Hyperion® Performance Suite™

Release 8.3

Hyperion® Foundation User's Guide

Hyperion®

Hyperion Solutions Corporation

P/N: D830583000

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Hyperion Solutions Corporation
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Sunnyvale, California 94089

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Preface

Welcome to the *Hyperion Performance Suite Foundation User's Guide*. This preface discusses the following topics:

- "Purpose" on page xiii
- "Audience" on page xiii
- "Document Structure" on page xiv
- "Related Documents" on page xv
- "Where to Find Documentation" on page xix
- "Conventions" on page xx
- "Additional Support" on page xxi
- "Documentation Feedback" on page xxi

Purpose

This guide provides information that you need to use the capabilities of the Hyperion Foundation web modules, a component of Hyperion Performance Suite. It explains Hyperion Performance Suite features and options and contains the concepts, processes, procedures, formats, tasks, and examples that you need to use the software.

Audience

This guide is for all levels of Hyperion Performance Suite users who are responsible for tasks ranging from simply finding and viewing documents to publishing many kinds of files or scheduling jobs and distributing their output around the globe

The *Foundation User's Guide* assumes familiarity with distributed computing environments and terminology, server management, web servers and servlet engines, and Microsoft Windows and/or UNIX operating systems.

Document Structure

This document contains the following information:

Chapter 1, "Overview and Basics," introduces Hyperion Performance Suite.

Chapter 2, "Finding and Viewing Content," discusses browsing or searching for information, and modifying folders and items.

Chapter 3, "Browse Preferences," discusses setting up your Browse environment using the Browse module preferences.

Chapter 4, "Using View Manager and Personal Pages," explains how to create a custom view of the information you are most interested in.

Chapter 5, "Subscribing," explains how to get automatically notified when content of interest to you is created or modified.

Chapter 6, "General Publishing," instructs you in publishing all files and jobs to the Hyperion Foundation Repository.

Chapter 7, "Managing Jobs,"explains how to immediately run jobs and how to schedule their execution and specify the distribution of their output.

Chapter 8, "BQY Jobs," details all of the properties and options specific to BQY jobs.

Chapter 9, "SQR and Generic Jobs," details all of the properties and options specific to SQR and generic jobs.

Chapter 10, "SQR Custom Parameter Forms," instructs how to create and use custom parameter forms for SQR jobs.

The Glossary contains a list of key terms and their definitions.

The Index contains a list of Hyperion Performance Suite terms and their page references.

Related Documents

Hyperion Performance Suite's comprehensive documentation set offers detailed technical information, troubleshooting advice, and best practices guidelines that help you maximize your Hyperion Solutions experience. In addition to the manuals listed, Hyperion Performance Suite products include substantial online help systems and release notes.

Note The documents listed in this section are located on the Document CD that ships with Hyperion Performance Suite.

General Documentation

What's New in Hyperion Performance Suite describes the new functionality of the Hyperion Performance Suite system.

The *Hyperion Performance Suite Installation Guide* provides the information you need to successfully install the Hyperion Performance Suite software on both Microsoft Windows and UNIX systems. It includes operating system and third-party software requirements; installation instructions and prerequisite information; installation details including directory structure and contents, registry entries, and sample INI, config, log, and startup files; configuration information for those administration tasks necessary to complete installation; and troubleshooting information including error messages.

The *Hyperion Performance Suite Migration Guide* provides guidelines and recommendations for migrating from Brio Portal 7. 0.x to Hyperion Performance Suite, and for migrating from Brio Intelligence 6.5 to Hyperion Performance Suite.

The *Hyperion Performance Suite Accessibility Guide* describes the accessibility features of all Hyperion Performance Suite products.

Hyperion Foundation Documentation

The *Hyperion Foundation Administrator's Guide* encompasses administration of Hyperion Foundation's services, applications, and tools. This book helps administrators define users and access privileges, configure and maintain the Hyperion Performance Suite system, and customize the user interface. The *Hyperion Foundation Administrator's Guide* is written for all levels of Hyperion Performance Suite administrators, from those who administer only a group of users, to those who oversee an entire system.

The *Hyperion Foundation Developer's Guide* provides information on how to customize and extend Hyperion Performance Suite using Foundation APIs, JSP pages, HTML templates, and other provided developer resources. This book is written for Java developers who need to customize the user interface and extend their system.

Hyperion Intelligence Documentation

The *Hyperion Intelligence Getting Started Guide* provides an overview of the Hyperion Intelligence client components and explains the user interface and basic commands. It includes information on how to retrieve data, how to query new data and change existing queries, and how to query a single database as well as multiple databases. It also covers how to work with query results. It is written for all levels of Hyperion Intelligence users.

The *Hyperion Intelligence Data Analysis and Reporting Guide* introduces the types of reports available in the Hyperion Intelligence client components and provides an overview of reporting concepts. It is written for all levels of Hyperion Intelligence users, from those who need to simply retrieve and view data in a report format, to those who need to build queries and reports as well as analyze data.

The *Hyperion Intelligence Object Model and Dashboard Design Guide* provides an understanding of Dashboard sections, and of the JavaScript syntax and object framework, specifically as they apply to interacting with BQY document elements. This book is written for developers who create documents using Hyperion Explorer or Hyperion Designer and who need to create front-ends using the Dashboard functionality provided by Hyperion Intelligence.

The *Hyperion Intelligence Administrator's Guide* helps administrators manage Hyperion Intelligence. The book is written for Hyperion Explorer and Hyperion Designer users who have access to more advanced features (such as connectivity and data modeling) and who may have responsibility for implementing Hyperion Intelligence in an enterprise environment.

Hyperion SQR Documentation

The *Hyperion SQR Getting Started Guide* provides procedures and code example to help develop SQR reports. This book is written for programmers who have a working knowledge of SQL and experience in writing software programs and who are developing reports for relational databases.

The *Hyperion SQR Language Reference* describes the structure, command set, and syntax of the SQR language. It also provides a directory to the library of sample SQR programs, an overview of the SQR initialization file, and a listing of SQR messages. This reference is intended for Hyperion SQR and SQL developers who must report on data from a wide range of enterprise datasources.

Designing Reports with Hyperion SQR Developer explains how to create SQR reports on Windows systems using Hyperion SQR Developer, Hyperion Solutions's GUI report design and layout tool. This book is written for anyone who wishes to create reports using the SQR Developer graphical user interface. To use this book effectively, you should be familiar with general report creation and your particular database and operating system. If you wish to create more complex reports using Hyperion SQR, you should be familiar with the SQR syntax and commands.

Accessing Data with Hyperion SQR for DDO provides an abstraction layer for heterogeneous data sources. This book describes DDO, its architecture and interfaces. It provides examples and instructions for accessing data from a DDO application and for writing a DDO driver. The book also discusses programming considerations and DDO common utilities. This book is written for developers who want to write DDO drivers that implement the DDO interfaces, as well as application developers who want to use the DDO interfaces for data access in their applications.

Using Hyperion SQR Activator explains how to integrate Hyperion SQR into a business application using an application development environment (such as Visual Basic) that supports Microsoft ActiveX Controls to satisfy production

and enterprise reporting needs. This book is written for application developers familiar with ActiveX controls who want to give their users the ability to run, view, and print SQR reports as part of their applications.

Where to Find Documentation

All Hyperion Performance Suite documentation is accessible from the following locations:

- Online help is accessible from the product that it documents. Start the product and click the Help button or menu command.
- The Hyperion Solutions Web site is located at `http://www.hyperion.com`.
- Access to the Hyperion Download Center is through `http://hyperion.subscribenet.com`.

To access documentation from the Hyperion Solutions Web site:

1. **Log on to `http://www.hyperion.com`.**
2. **Select the Support link and type your username and password to log on.**

Note New users must register to receive a username and password.

3. **Follow the on-screen instructions.**

To access documentation from the Hyperion Download Center:

1. **Log on to `http://hyperion.subscribenet.com`.**
2. **In the Login ID and Password text boxes, enter your assigned login ID name and password. Then click Login.**
3. **If you are a member on multiple Hyperion Download Center accounts, select the account that you want to use for the current session.**
4. **Follow the on-screen instructions.**

To order printed documentation:

1. **Visit the Hyperion Solutions Web site at `http://www.hyperion.com`.**
2. **In the United States, call Hyperion Solutions Customer Support at 877-901-4975.**

3 **From outside the United States, including Canada, call Hyperion Solutions Customer Support at 203-703-3600. Clients who are not serviced by support from North America should call their local support centers.**

Conventions

The following table shows the conventions that are used in this document:

Item	Meaning
➤	Arrows indicate one-step procedures.
Bold	Bold highlights options, buttons, or tabs that you need to choose and text that you need to type.
CAPITAL LETTERS	Capital letters denote commands and various IDs. For example: CLEARBLOCK command
[Ctrl + O]	Keystroke combinations shown with the plus sign (+) indicate that you should press the first key and hold it while you press the next key. Do not type the plus sign.
`Example text`	Courier font indicates that the example text is code or syntax. Courier font is also used for file names, directory/folder names, and path names. For example: `Sample1.bqy` is located in the `\HYPERION_HOME\Samples` directory.
`Courier italics`	Courier italic text indicates a variable field in command syntax. Substitute a value in place of the variable shown in Courier italics.
Mouse orientation	This document provides examples and procedures using a right-handed mouse. If you use a left-handed mouse, adjust the procedures accordingly.
Menu options	Options in menus are shown in the following format. Substitute the appropriate option names in the placeholders, as indicated. ***Menu name→Menu command→Extended menu command*** For example: **1.** Select **File→Desktop→Accounts**.

Additional Support

In addition to providing documentation and online help, Hyperion offers the following product information and support. For details on education, consulting, or support options, visit Hyperion's Web site at http://www.hyperion.com.

Education Services

Hyperion offers instructor-led training, custom training, and eTraining covering all Hyperion applications and technologies. Training is geared to administrators, end users, and information systems (IS) professionals.

Consulting Services

Experienced Hyperion consultants and partners implement software solutions tailored to clients' particular reporting, analysis, modeling, and planning requirements. Hyperion also offers specialized consulting packages, technical assessments, and integration solutions.

Technical Support

Hyperion provides enhanced electronic-based and telephone support to clients to resolve product issues quickly and accurately. This support is available for all Hyperion products at no additional cost to clients with current maintenance agreements.

Documentation Feedback

Hyperion strives to provide complete and accurate documentation. We value your opinions on this documentation and want to hear from you. Give us your comments by going to http://www.hyperion.com/services/support_programs/doc_survey/index.cfm.

1 Overview and Basics

Hyperion Performance Suite delivers query, analysis, and reporting in a web-based solution. Hyperion Foundation supports the entire Suite by providing easy, centralized access to information from your entire enterprise and beyond. You access and work with this information primarily through the four Hyperion Foundation modules: Browse, Personal Pages, Job Manager, and View Manager.

This chapter introduces the capabilities of Hyperion Foundation and some basic instructions for using the four main modules.

Note Documents that you can see, actions that you can perform, and resources that you can use in the Hyperion Performance Suite system are all controlled by the access control system.

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Hyperion Foundation Capabilities

Hyperion Foundation assists you in two fundamental tasks: getting information you need, and making information available to others who need it.

You can obtain information in a variety of ways, including browsing for documents, subscribing to folders that interest you, and through dashboards. You make information available to others by publishing it.

Reports are a special way to communicate information. You can publish jobs to allow generation of reports. Once a job is published, you can run it at any time, or schedule it to automatically run.

Web Modules

Hyperion Foundation has four web modules that you access through your web browser. These modules—your main tools for using the system—are:

- **Browse** – For finding and viewing all the information in Hyperion Foundation, and publishing information for others to use.
- **Job Manager** – For scheduling the automatic running of reports.
- **View Manager** – For viewing and managing all of your dashboards and pushed items.
- **Personal Pages** – Your personal window to information in Hyperion Performance Suite. You select what information to display, as well as its layout and colors.

There are several tasks that you perform similarly in all of the web modules and some concepts that pertain to all of them. These tasks and concepts are explained in the following sections.

Integration with Hyperion Products

You can access Hyperion Reports and Hyperion Analyzer applications through Hyperion Performance Suite. You can access the applications through the navigation pane of the browse module or on dashboards if the applications have been embedded.

Starting a Hyperion Foundation Session

You can start a Hyperion Foundation session by entering the specific URL for a module or by choosing a link to one of the modules.

To start a Hyperion Foundation session:

1 **In your web browser, go to the web page for the module where you wish to start.**

Ask your administrator if you do not have a link to the module or its URL. Each module has its own URL.

After starting one module, you can switch to another without relogging in.

2 **Enter your user ID and password in the required fields.**

User ID and password are case sensitive. Do not confuse your user ID with your user name. If you enter your user name, and it is different from your user ID, you will not successfully log in.

To start a session, you must log on to Hyperion Foundation, unless your administrator has set up your system to bypass the logon step, for example, by automatically logging you on using your network logon information.

3 **Choose Advanced to view your authentication system or to select another authentication system.**

4 **Choose Login.**

The main page of the module appears.

Switching Between Modules

From any web module, you can easily open another module.

To switch between modules:

➤ **From the drop-down Module menu located at the upper left, choose the module you want to open.**

Basics of Using the Web Modules

There are some general ways of doing things in all of the web modules. This section explains these general patterns, which are used for many tasks.

What's What on a Page

There are some common elements that appear on many pages of the web modules. Figure 1-1 shows these elements.

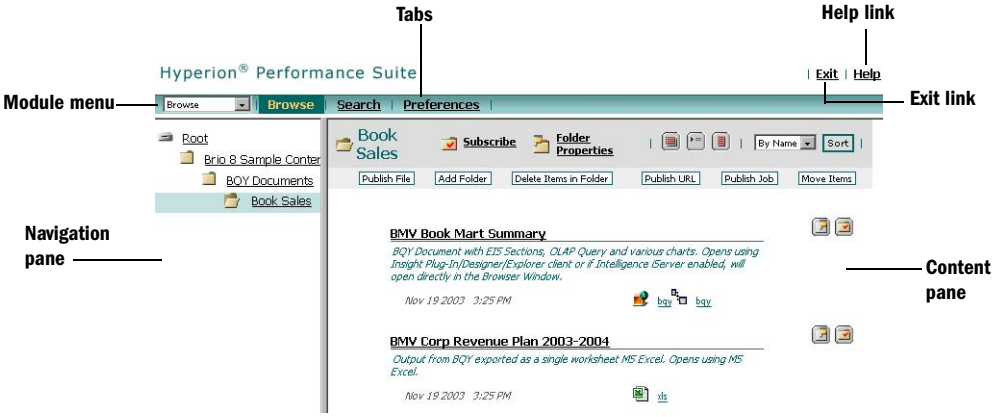


Figure 1-1 Common Elements of a Page

Moving Among Tabs

Each web module groups its features. You access these features by using the *tabs*, which appear to the right of the drop-down Module menu.

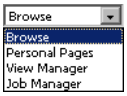
➤ **To move to a different tab, select it.**

Starting a Task

Most tasks in Hyperion Foundation start the same way.

To begin a task:

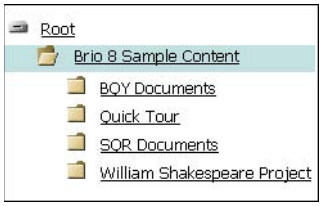
1 **Choose the appropriate web module from the Module menu.**



2 **Select the appropriate tab for the general area you want.**

3 **Select what you want to work on in the Navigation pane.**

The Navigation pane is used to display different contextual links. Depending on the context, you may choose a folder, or a task, a preferences group, and so on.



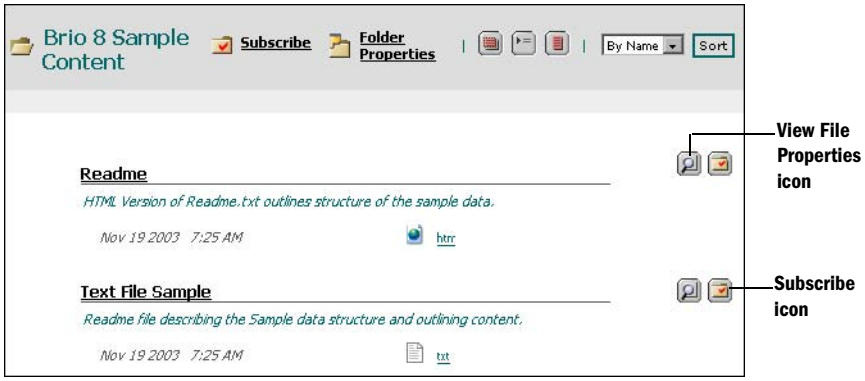
The Content pane displays a page corresponding to your selection: the contents of a selected folder, the first page to do a selected task, the selected group of preferences, and so on.

4 **Do the specific task.**

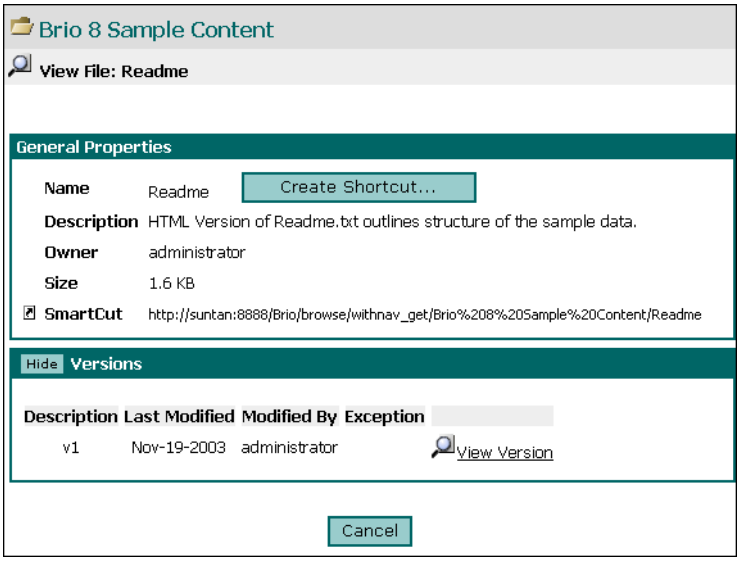
Three common possibilities for your next step are:

- If there is an action menu at the top of the Content pane, you might choose an action there. Here is an example of an action menu:

- If the Content pane displays a list, you might locate an item you want to work with and choose the icon next to it. Here is an example of icons for items in a list:



- If the Content pane displays properties, you might view or modify the properties. Here is an example of a properties page:



Saving or Discarding Changes

On pages where you modify information, choose either **Apply** (stays on the same page) or **OK** (moves to another page) to save your changes, or **Cancel** to discard the changes you made.

Avoid Browser's Back Button

Generally, you should avoid using the Back button of your web browser while using Hyperion Foundation. The Back button displays the page as it appeared when you last viewed it, and the page may have changed since then.

Instead of using the browser's Back button, choose a folder name or other Hyperion Foundation link to get fresh information.

Filtering a Displayed List

Sometimes, such as when assigning access privileges, you will see a page like the following, which has a list below a line beginning *Display only...*:

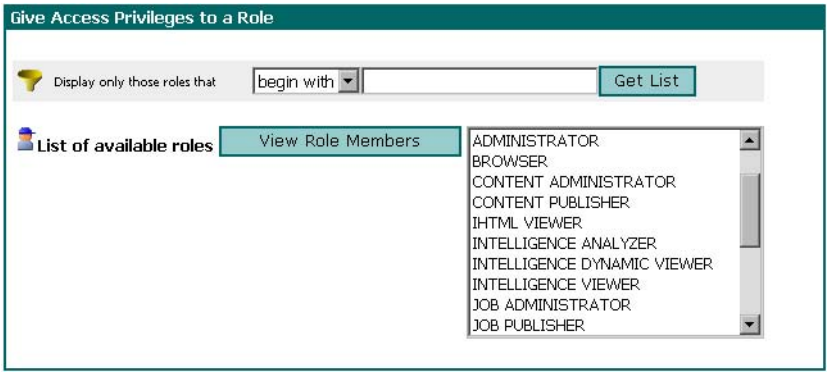


Figure 1-2 Display Only Example

To filter a displayed list:

1. **Choose one of the options from the drop-down menu.**
2. **If there is a text box, enter one or more characters in the text box.**

   Wildcards are not supported. Leaving the textbox empty returns an unfiltered list.
3. **Choose Get List.**

   Figure 1-3 and Figure 1-4 show some examples of filtered lists, showing the results of different entries.

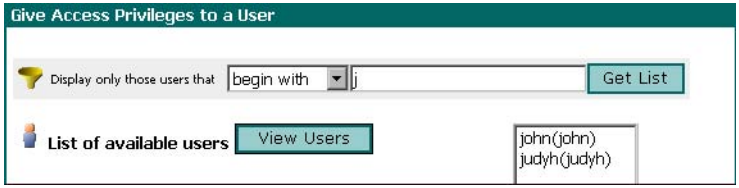


Figure 1-3 List of Users Beginning with "c"

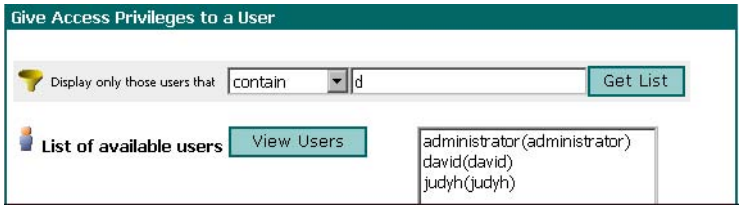


Figure 1-4 List of Users Containing "ad"

Making Lists Using Two Boxes

When making a list, you often see two list boxes like those shown in the Figure 1-5. For example, you use two list boxes to move items between folders or to delete items from a folder.

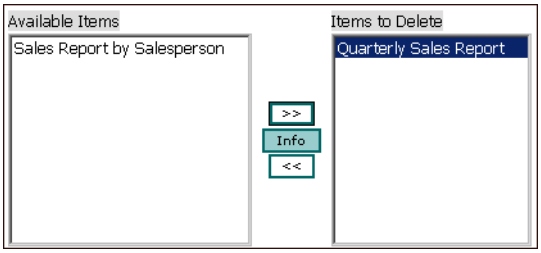


Figure 1-5 Two List Boxes

To make a list using two boxes:

1 **Specify a value in the box on the left.**

- If the box is an *edit box*, enter a value.
- If the box contains a list, select one or more value(s).

You can get more information, such as the descriptions of items, by selecting one or more items and then choosing the **Info** button.

2 **Choose the right-facing arrows (>>) to move the value into the *list box* (on the right).**

3 **Repeat the previous steps until your list is complete.**

4 **Choose the button at the bottom of the page that finishes the operation.**

The button that finishes the operation is next to the Cancel button and its title depends upon the operation.

Basics of the Browse Module

In the Browse module you find or search for documents and publish or make documents available for others. When you start the Browse module, the first page that appears is a list of items. Figure 1-6 shows important features of the Browse page.

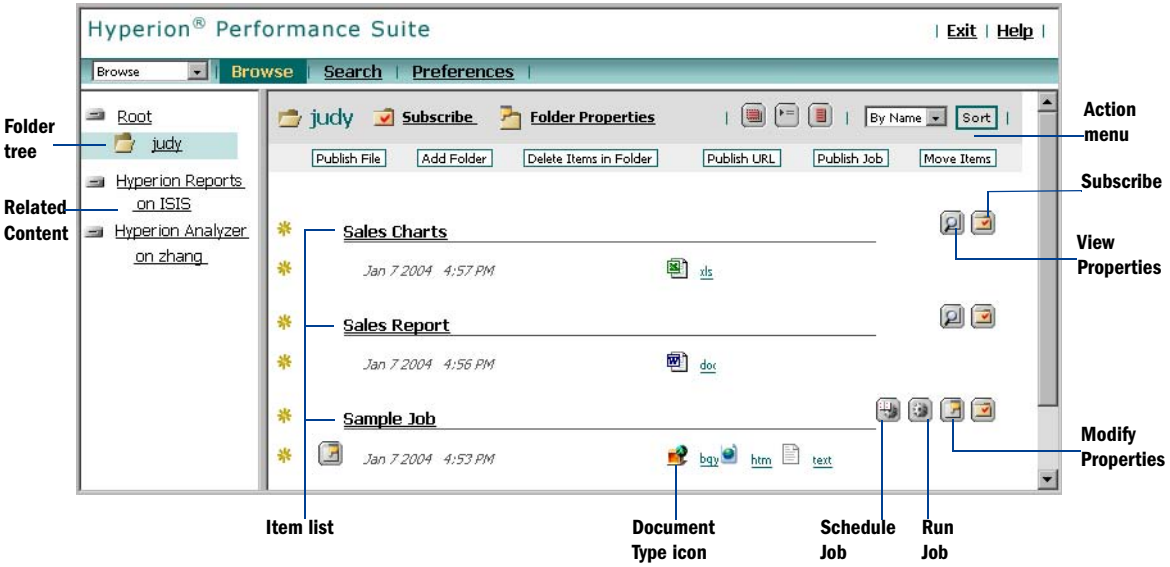


Figure 1-6 Browse Module

You can use the following features in the Browse module:

- **Folder tree** – Navigate to Hyperion Performance Suite folders and Related Content.
- **Item list** – View the contents of a selected folder.
- **Document Type icon** – Determine a document's file format.
- **Action menu** – Publish files, URLs, and jobs; add folders; modify folder properties; and move or delete items.
- **Schedule Job icon** – Select to schedule a particular job.
- **Run Job icon** – Select to run a particular job.
- **Subscribe icon** – Select to subscribe to an item.
- **View/Modify Properties icon** – Select to view or modify item properties.

Basics of the Job Manager Module

Use the Job Manager module to schedule job runs and manage scheduled jobs, time events, and job parameters. Figure 1-7 shows important features of the Job Manager module.

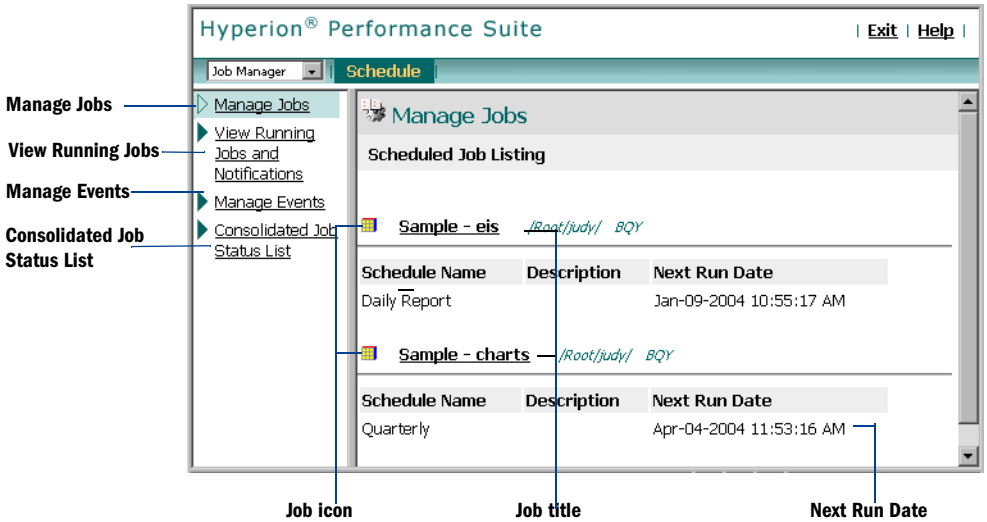


Figure 1-7 Job Manager Module

You can use the following features in the Job Manager module:

- **Manage Jobs page** – Add, delete, and modify job parameters and schedules.
- **View Running Jobs and Notifications page** – View current status of running jobs.
- **Manage Events page** – Add, delete, and modify time events.
- Consolidated Job Status List – **Monitor your scheduled jobs**
- **Job icon** – Determine the type of a particular job.
- **Next Run Date** – See when a job is scheduled to run next.

Basics of the View Manager Module

Use the View Manager module to view items and dashboards to which you have subscribed and items and dashboards that have been pushed to you.

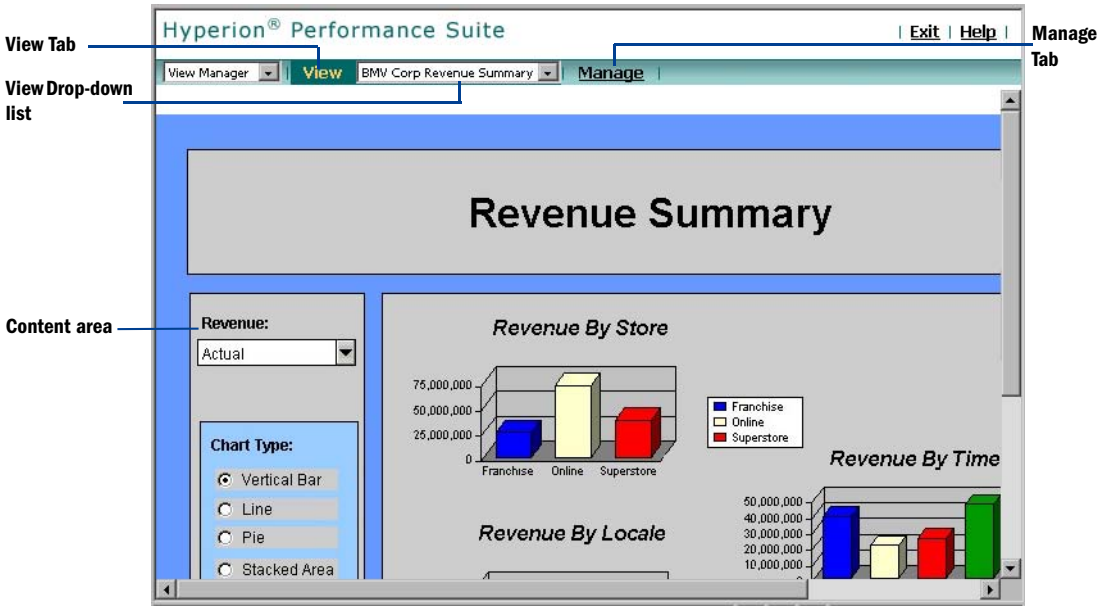


Figure 1-8 View Manager Module

You can use the following features in the View Manager module:

- **View Tab** – View your default dashboard or item or the dashboard or item you select.
- **View drop-down list** – Drop-down list of dashboards and items either selected by you or your administrator.
- **Content** area – Display either your default dashboard or item or the dashboard or item you selected from the drop-down list.
- **Manage Tab** – Add or remove an item or dashboard from the View drop-down list, select your default dashboard, and remove items from your View Manager.

Basics of the Personal Pages Module

A Personal Page is a place for you to display the information you need most frequently. You can have multiple Personal Pages and customize them to suit you. You can choose a default Personal Page, which is the page that first appears when you start the Personal Pages module.

Figure 1-9 shows different types of content that you can display on a Personal Page. A particular Personal Page may have some or all of these types.

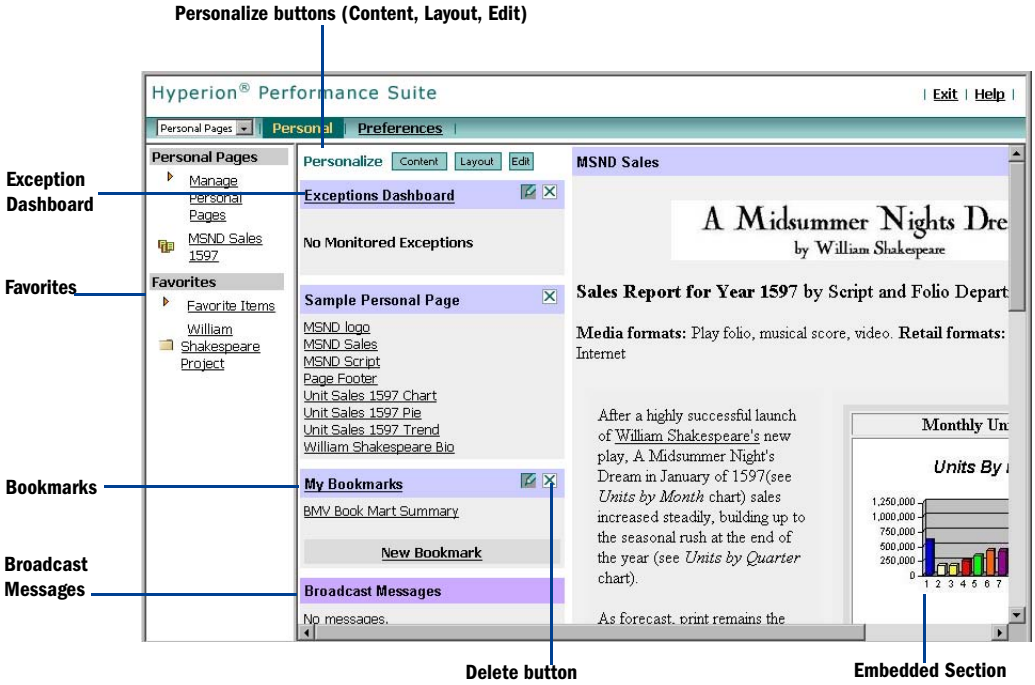


Figure 1-9 Personal Page Content Examples

You can use the following features in the Personal Pages module:

- **Broadcast Messages** – View messages your administrator addresses to everyone. Only the administrator can change the Broadcast Messages.
- **Favorites** – View the items and folders you use most frequently.
- **Bookmarks** – Add links to web pages.
- **Exceptions Dashboard** – Receive graphical alerts when an exception occurs.

- **Embedded BQY Sections** – Using Intelligence iServer popup menus, work interactively on sections from Hyperion Intelligence Products (Results, Tables, Pivots, Charts, and OLAP Results) that are embedded into a Personal Page.
- **Personalize buttons** – Customize your Personal Pages:
  - Choose **Content** to add or remove content offered by your administrator to/from your Personal Page.
  - Choose **Layout** to choose a different layout style or to change where the content appears on the page.
  - Choose **Edit** to choose different colors for various elements of the page.
- **Delete button** – Choose to delete the content window.

Basics of Access Control

Hyperion Performance Suite's access control determines which items you can access, and which operations you can perform. You get access to items as a user, as a member of a group, or through a role given to you. In addition, a publisher can give or revoke explicit access to a document. The level at which you can access items and perform tasks is called your *access privilege*.

Access to specific objects in the repository is controlled by the owner or publisher of the document. Access to operations, such as publishing, running jobs, or pushing items, is controlled through the roles you are given. For example, the owner of Job A gives you the modify and run access privilege, but you can only run that job if you have the Job Runner role. For Document B, the owner gives you the full control access privilege, but you can push Document B to others only if you have the View Manager Content Pusher role.

When you publish a file, you are the "owner" of that file, and you specify what level of access other users can perform on the file. You might specify that all users can read it, your group can modify it, and only you can have full control (delete it, change access to it, push it).

Quick Start Guide

Table 1-1 helps you quickly locate information to perform the most common tasks. You also can use this table as a checklist for learning the basic tasks.

Table 1-1 Quick Start Guide

Task	Description	Where to read about it
Browsing for items	Find items by looking through folders.	"Browsing" on page 2-4
Searching for items	Find items according to their keywords.	"Searching" on page 2-23
Viewing or modifying item properties	Properties include, for example, an item's description, expiration date, and access control.	"Viewing or Modifying Properties of an Item" on page 2-12
Moving items or folders	Move items or folders to another folder.	"Moving an Item or Folder" on page 2-19
Deleting items or folders	Delete items or folders.	"Deleting an Item or Folder" on page 2-20
Creating folders	Create a new folder.	"Creating a Folder" on page 2-21
Modifying folder properties	Modify a folder's properties.	"Viewing or Modifying Properties of a Folder" on page 2-22
Knowing the elements of a Personal Page	Personal Pages can contain various types of elements, such as bookmarks, HTML content, and live feeds.	"Basics of the Browse Module" on page 1-10
Customizing your Personal Pages	Modify the layout, contents, and colors of a Personal Page.	"Customizing Personal Page Content" on page 4-10
Creating bookmarks	Add bookmarks (links to web pages) to a Personal Page.	"Creating Bookmarks" on page 4-20
Subscribing to items and folders	Use subscriptions to get notifications of new or changed items, bookmark items, or put them in your Favorites.	Chapter 5, "Subscribing"
Displaying HTML content on a Personal Page	Display an HTML page on your Personal Page (in contrast to just displaying a link to it).	"Displaying HTML Content on Personal Pages" on page 4-13
Embedding sections of a BQY file on a Personal Page	Embed parts of a BQY file on a Personal Page (in contrast to just displaying a link to the file).	"Embedding BQY Document Sections in Personal Pages" on page 4-15

Table 1-1 Quick Start Guide *(Continued)*

Task	Description	Where to read about it
Creating a Personal Page	Create one or more Personal Pages.	"Creating a Personal Page" on page 4-34
Running a job	Execute a job immediately.	"Running a Job" on page 7-5
Scheduling an SQR, BQY, or generic job	Schedule a job to execute automatically at one or more predefined times, and specify to whom the output is distributed and how.	"Scheduling a Job" on page 7-7
Publishing a file or job	Make files available to others for viewing or modifying.	"Publishing Content" on page 6-4
Publishing a BQY document	Make BQY documents available either as files or as jobs.	"BQY Documents: Whether to Publish as Files or Jobs" on page 6-3
Publishing an SQR job	Make SQR jobs, generic jobs, or SPF files available to others.	"Publishing Content" on page 6-4
Setting access privileges	Define who has what privileges on a file that you publish.	"Setting Access Privileges" on page 6-8
Viewing dashboards	View a list of subscribed items and items that are pushed to you.	"Using the View Manager Module" on page 4-2

Summary

In this chapter, you learned what you can do with Hyperion Foundation, how to start a session, and what the main modules are used for. You also learned to identify standard parts of the page and to use some standard user-interface features. Finally, you learned what access privileges are and how they affect what you can see and do with Hyperion Performance Suite content.

2 Finding and Viewing Content

This chapter explains the basic tasks of finding and viewing your Hyperion Performance Suite content and Related Content with the Browse web module. *Related Content* is content from other Hyperion applications made available to you through the browse module of the Hyperion Performance Suite.

You can also publish and modify content using the Browse web module. For information on publishing content see Chapter 6, "General Publishing."

In This Chapter

About Items and Folders 2-2
Basics of Browse 2-4
Viewing Content. 2-9
Working with Items and Folders 2-19
Viewing Related Content 2-22
Searching 2-23

About Items and Folders

Content is everything your enterprise stores in Hyperion Foundation. The place where it is stored is called the Repository. Content can include report programs (jobs), report output, documents such as spreadsheets or word processing documents, images, HTML pages, files of any other type, multiple versions of files, and URLs. Each piece of content is called an item.

Items

An item is a file and its properties. Properties store extra information about the file. (This information is also called metadata.) Examples of properties include a description of the file, search keywords, and access control information that defines who may use the item and in what ways. An item may also contain multiple versions of its file. In the case of job output, an item may be a collection of output files in different formats.

Files

Files are any kind of items you publish, except jobs. Files that you can store in Hyperion Foundation include, for example, word processing documents, HTML files, images, BQY files or jobs documents, OCE files, and report output files.

Jobs

Jobs are programs you publish along with any other files that the jobs need in order to run. A job has special properties you specify so it can be executed.

Jobs fall into three categories:

- **BQY jobs** – BQY jobs are created with Designer or Explorer. You publish them using the Browse web module.
- **SQR jobs** – SQR jobs are created with SQR Developer. You publish them using the Browse web module.
- **Generic jobs** – Generic jobs are created using other applications (for example, Oracle or Crystal Reports) that have a command line interface.

Special Item Types

In addition to files and jobs, there are some special item types in Hyperion Foundation:

- **URL** – A link to a web page on the Internet or an intranet. By putting a URL in a folder, you can group together files and related web pages, as though the web pages were actually in the folder.
- **Shortcut** – A link to an item elsewhere in the Hyperion Foundation Repository. Create a shortcut when, for example, you want an item to appear in folder A, though it is stored in folder B.

Folders

The Hyperion Foundation lets you organize your items into folders. *Folders* are similar to the directories of your operating system, and are arranged in a hierarchical structure. A folder can contain subfolders, items, or both. Your administrator creates some folders for your enterprise, and users can create additional ones.

You can store items of all types together in a folder. In this way, you can organize information by its subject matter rather than where it comes from. For example, you can keep together all jobs, documents, and URLs pertaining to a project.

Basics of Browse

When you want to find or view content, you use the Browse web module. For a guide to the parts of the screen, see “Basics of the Browse Module” on page 1-10.

Browse has three tabs: Browse, Search, and Preferences. Browse is the tab that first appears when the Browse web module starts. You use the Browse tab for browsing through folders, viewing content, and performing actions on items and folders. On the Browse tab, you use the Navigation pane to navigate through folders and choose a folder to work in. You work with content in the Content pane. Initially, the Content pane displays an item list, as in Figure 2-1.

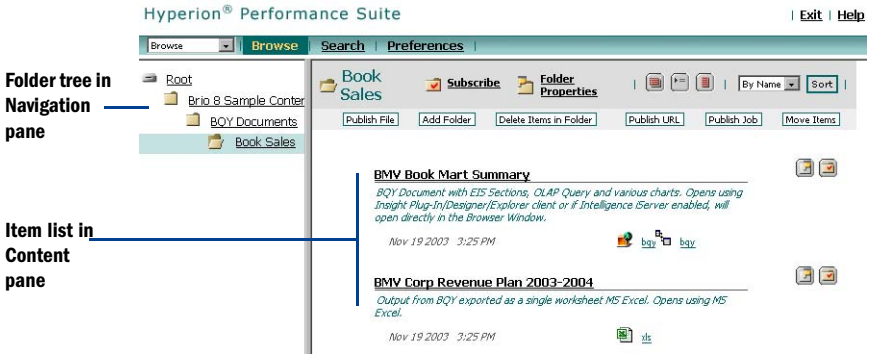


Figure 2-1 Content and Navigation Panes in the Browse Page

Note You must have proper access privilege to your default folder as well as at least view access privilege to all of its parent folders in order to be able to access the Browse module. If you cannot access the Browse module, contact your system administrator.

Browsing

By browsing through folders, you can look for items about a particular subject or a particular department—according to how your system’s folders are organized.

To see the contents of a folder, you select the folder name in the folder tree in the Browse module. The folder's contents appear as shown in Figure 2-2:

- In the Navigation pane, the folder's subfolders are listed.
- In the Content pane, the folder's items are listed.

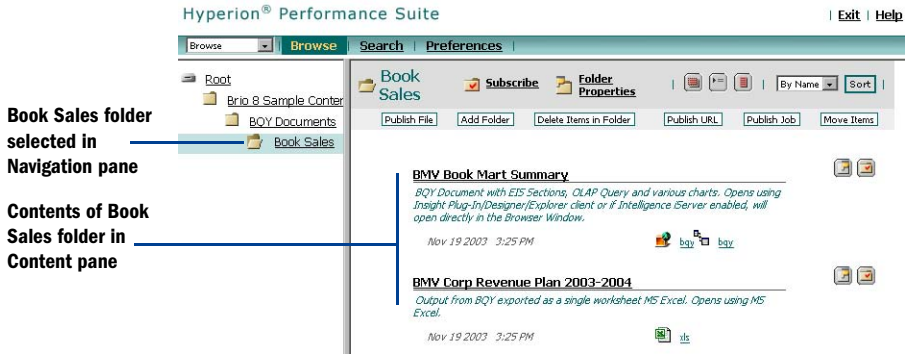


Figure 2-2 Folder Contents

Browsing is simple, yet a couple of points merit mention. First, if a folder contains *only* subfolders, the Content pane will advise you that there are no items in it. Looking just at the Content pane, you may think the folder is empty. Look at the Navigation pane to see the subfolders. In Figure 2-3, the folder named Broadcast Messages contains no content; however, its subfolders are displayed in the Navigation pane.

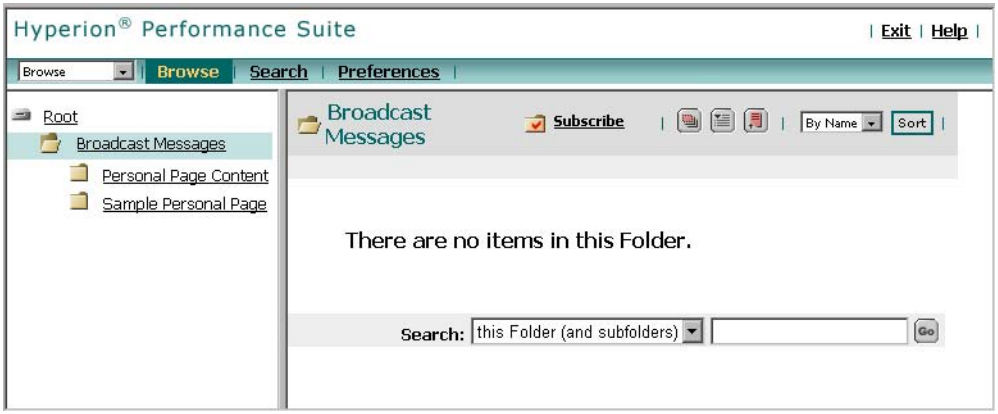


Figure 2-3 Folder that Contains Only Subfolders

When there are several subfolders in a folder, and you open one of them, the others are no longer visible. Instead, the selected folder opens, and its subfolders are shown. So it can appear that the selected folder has no *siblings* as in Figure 2-4; the folder Sample Personal Pages, a subfolder of Broadcast Messages, is open, revealing its subfolders, but hiding its sibling.

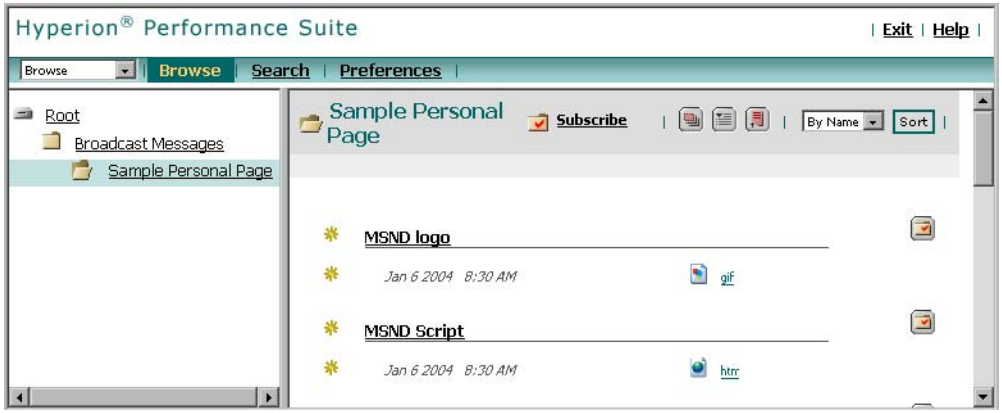


Figure 2-4 Contents of a Subfolder

Open the *parent* folder to see the formerly selected folder and its siblings. In Figure 2-5, Broadcast Messages is selected again, revealing Broadcast Messages and its siblings.

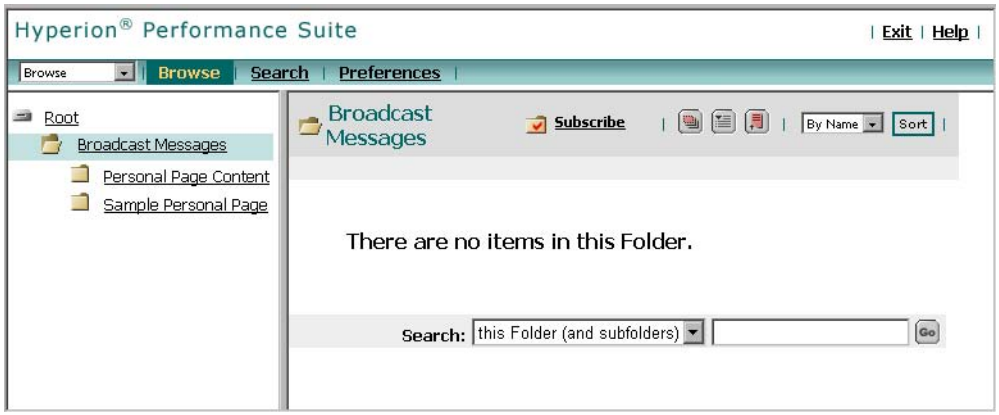


Figure 2-5 Parent Folder Opened Again

Information in an Item List

Figure 2-6 shows a typical item list and calls out the various icons, buttons, and information displayed on the page which are detailed in Table 2-1.

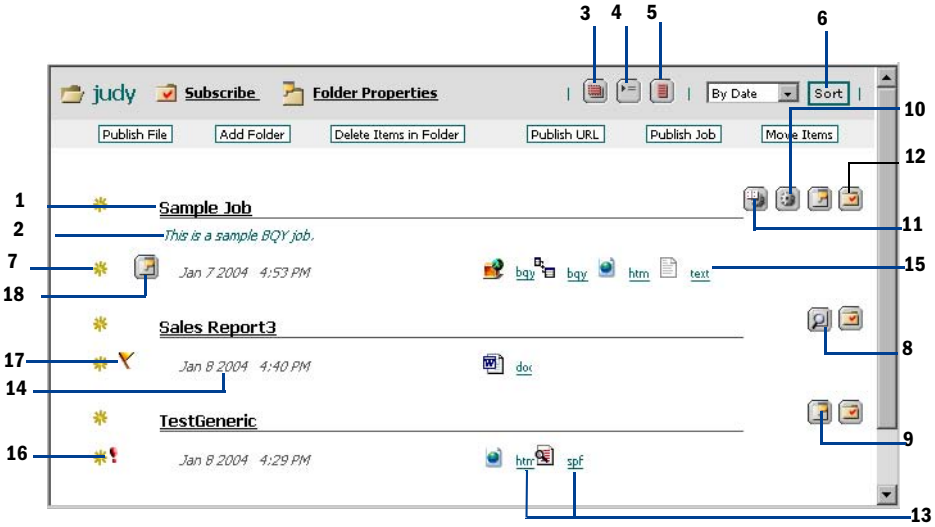


Figure 2-6 Browse Page Item List

Table 2-1 Information in an Item List

1	**Item name**	Choosing the name of the item opens it, unless the item is a job, in which case, choosing the item runs it.
2	**Item description**	Specifies what the item is or does.
3	**Show latest version only/Show all versions button**	For items with multiple versions and for jobs with multiple sets of job output, choose this button to toggle between showing only the latest version or last set of job output of each item and showing all versions and all the sets of job outputs.
4	**Hide/Show Item Descriptions button**	Choose this button to hide the item descriptions (2), or to show them again.
5	**Reveal/Conceal hidden Items button**	Some items may be marked as hidden, so they are normally not displayed. Choose this button to see them or to hide them again.
6	**Sort drop-down list**	Use this menu to list a folder's items in order By Name, By Date, or By Priority (if your Hyperion Foundation system displays priorities).
7	**New or Updated Item icon**	This icon indicates recently published or modified items. On the Preferences tab, you can set whether to display this indicator.

Table 2-1 Information in an Item List *(Continued)*

8	**View Properties button**	Choose this button to see the properties of the item. Display of this button indicates that you do not have permission to change the properties.
9	**Modify Properties button**	Choose this button to view or change the properties of the item. Display of this button indicates that you have permission to change the properties.
10	**Run Job button**	Choose this button to run the job immediately.
11	**Schedule Job button**	Choose this button to schedule the job to run at one or more future times.
12	**Subscribe button**	Choose this button to get notified when the item changes, or to put it on your Personal Page.
13	**File-format buttons**	Each version is represented by a button that indicates its file or item type (for example, BQY job or Microsoft Word document). To see the file size and original file name, hover the mouse over the file-format button.
14	**Date of version or output**	Date and time this version or job output was published or last modified.
15	**Job output buttons**	Below each item name, there is a list of job output buttons. All the job output files on one line are from the same run of the job. In this example the BQY job produced job output in HTML and Intelligence iServer format.
16	**High priority icon**	This icon indicates that the item was published with high priority.
17	**Exception icon**	This icon indicates that this version of the item has an exception.
18	**Modify Job Output properties button**	Choose this button to view or change the properties of the job output.

Viewing Content

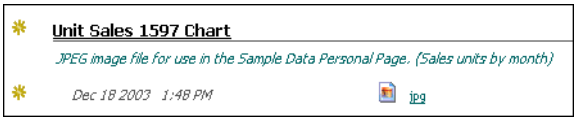
After you find the item you want, you can view it in the Browse module. This section describes tasks associated with viewing the contents of the Repository.

All of the tasks described in this section require that you are on the Browse tab of the Browse module.

Viewing an Item

To view an item:

➤ **Select the name of the item, or select the file-format link for a version or job output file.**

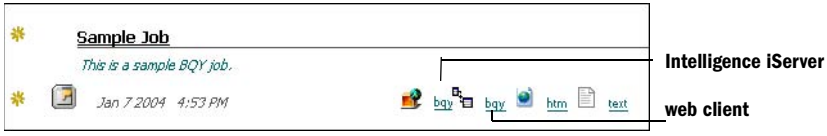


If your browser displays a prompt asking what program to use to open the file, this means that your browser does not recognize the type of file you are opening. For more information, see "Registering a New MIME Type or File Extension" on page 2-18.

To view BQY documents and BQY job output:

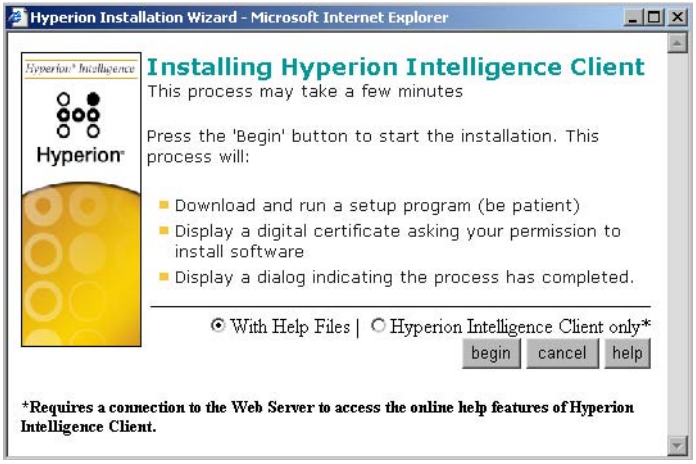
1 **Select the appropriate button to open your BQY document or BQY job output using the Intelligence iServer or the web client.**

If you select the Intelligence iServer, your document automatically opens. If you select the Intelligence Client, and you used it before, and your system has not been upgraded, the document automatically opens.



Note In UNIX or Mac, use the Intelligence iServer to view BQY documents or job output.

2 If you are using the Intelligence Client for the first time or if the Intelligence Client was upgraded since the last time you used it, you will be prompted to install.



Select either to install With Help Files or Intelligence Client only. Installing Intelligence Client without the help files takes less time and less disk space. However, if you are working offline, you cannot access the online help.

About Properties

Every item listed in Browse has properties (information about the item or metadata) saved as part of the item. The properties are grouped together and presented for viewing and modifying in boxes titled with the group name for easy reference. Figure 2-7 displays four groups of properties.

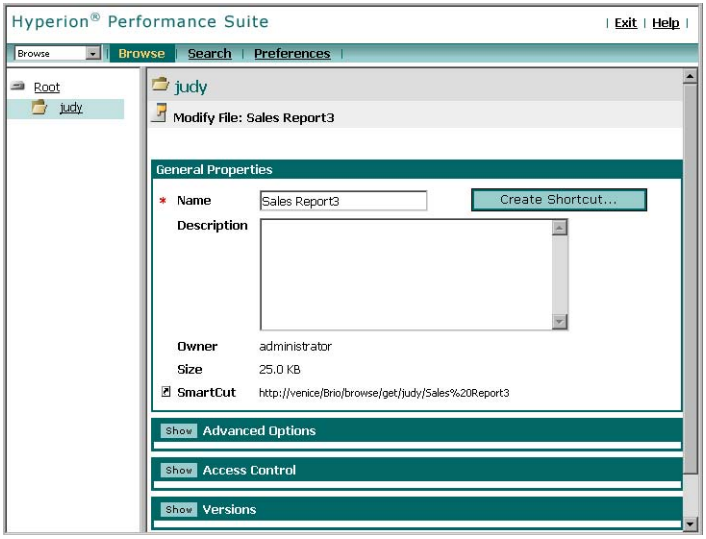


Figure 2-7 Example Properties Page

Notice that three of the groups are hidden (closed). To see their properties, you choose Show. When the box opens, revealing the properties, the Show button changes to Hide.

Advanced Options

When you first log on, properties named Advanced Options are unavailable, so all items you publish get the default settings for Advanced Options.

You can make the Advanced Options available by changing a setting on the Preferences tab. See "Browse Preferences" on page 3-5 for instructions on making Advanced Options available. The next time you publish an item, you can see the Advanced Options properties and can change their values.

Viewing or Modifying Properties of an Item

Every item listed in Browse has properties (information about the item or metadata) saved as part of the item. The properties are grouped together and presented for viewing and modifying in boxes titled with the group name for easy reference.

To view or modify an item's properties:

1 **Choose View Properties or Modify Properties for the item.**

The button that appears depends on depends on whether you have modify access to the item. If you have modify access, choose **Modify Properties** to modify or to view the properties.

For information about each property, see "Working with Properties and Options" on page 6-14.

2 Choose **OK** to save changes on this page and return to the Browse page.

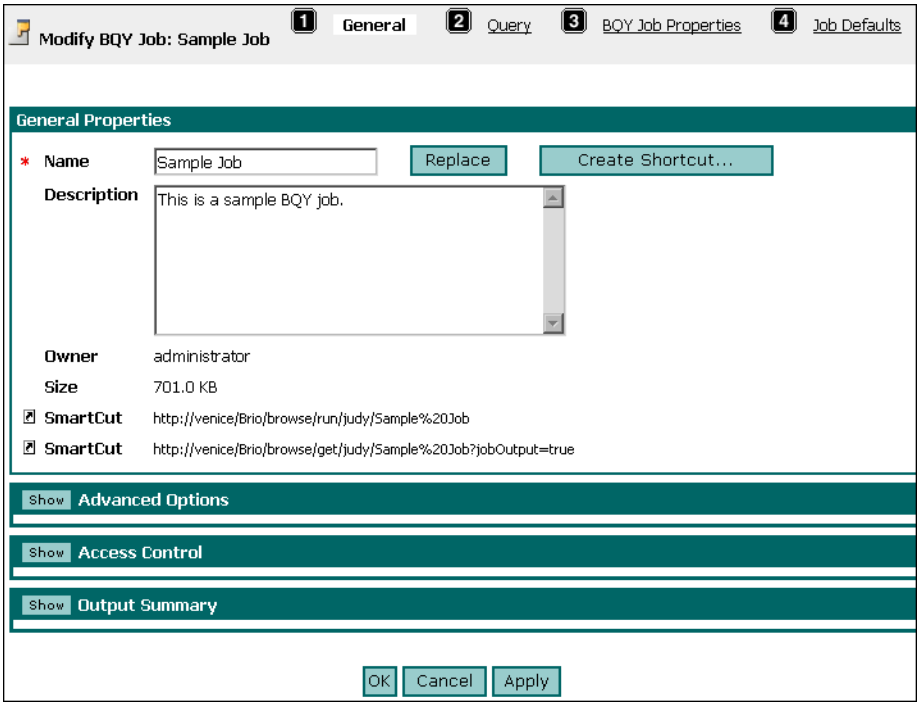
If the item has multiple property pages, choose **Apply** to save changes and continue to the next property page.

3 **To view or modify properties on another page, choose the link for that page.**

You can go to the property pages in any order.

4 **Choose Apply to save changes and continue to the next page until you have viewed or modified all the properties you want.**

Choose **Cancel** to discard your changes or choose **OK** to save changes on this page and return to the Browse page.



Note There are a few properties that appear only on versions (or output files), rather than the item itself. For more information, see Table 6-7 in Chapter 6, “General Publishing.”

Creating a Shortcut

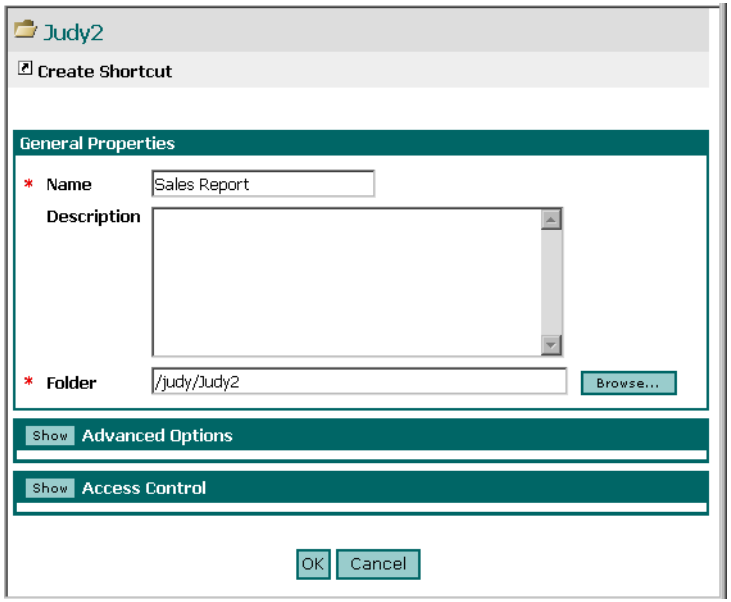
When you want access to an item from more than one folder, create a shortcut from the original folder to the second folder.

To create a shortcut:

1 Choose **Modify Properties** for the item.

2 Choose **Create Shortcut**.

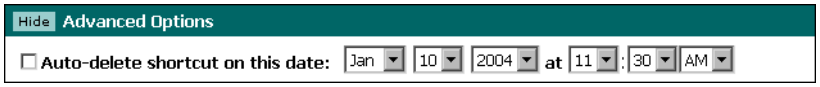
The Create Shortcut screen appears.



3 Enter the folder location or Browse for the folder location where you want to put the shortcut.

When you run a job from a shortcut the job output is stored in the folder with the shortcut.

4 If you want the shortcut to auto-delete, enable **Auto-delete shortcut on this date:** and select a date from the drop-down lists.



5 **Enter access control information.**

For more information on access control, see “Setting Access Privileges” on page 6-8.

6 **Choose OK.**

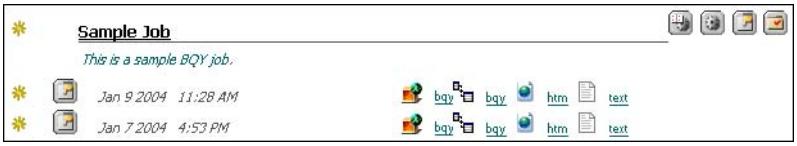
Viewing a Previous Version

When you choose the name of an item, the latest version of the item is displayed. You can also view previous versions of the item, if any have been published.

To view a previous version:

1 **If previous versions are not displayed, choose the Show All Versions button at the upper right of the page.**

2 **On the row of the version you want, choose the desired file-format link.**



For more information about versions, see “Working with Versions” on page 6-22.

Viewing or Modifying Properties of a Version

Version properties include the date the version was created, the date and user who last modified the version, the size of the file, and an option to flag as an exception.

To view or modify the properties of a version:

1 **Choose the View Properties or the Modify Properties button for the item.**

The button that appears depends on whether you have modify access on the item. If you have modify access, choose **Modify Properties** to modify or to view the properties.

2 **In the Versions section of the properties page, choose View or Modify next to the version of interest.**

You may need to choose the Show button on the Versions section if that section is hidden (closed). For details, see "Listing the Versions of a File" on page 6-26. For information about specific properties, see "Properties of Versions" on page 6-25.

Referring Another User to an Item

To give other users easy access to a particular item (so they do not have to navigate the folder tree or search for it), you can send the item's SmartCut. A *SmartCut* is a link, in the form of a special URL, to an item in the Hyperion Foundation Repository. In many email programs, the SmartCut is live in the message, so the recipient can simply choose it to launch a browser and go to the item. If the SmartCut is sent as plain text, recipients can copy the SmartCut into their browser's address bar.

An item's SmartCut is displayed on the General Properties page for the item. You can copy it from there.

To get the SmartCut for an item:

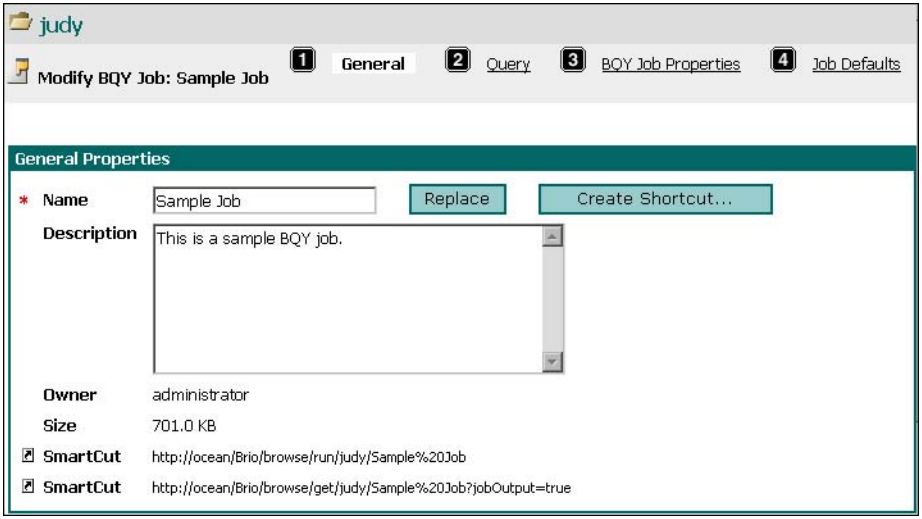
1 **Choose the View Properties or the Modify Properties button for the item.**

The button that appears depends on whether you have modify access on the item. If you have modify access, choose **Modify Properties** to modify or to view the properties.

2 **Copy the SmartCut.**

If the item is a job, choose between the following SmartCut types:

- **withnav_get** – Allows view access to an item including job output
- **withnav_run** – Allows run access to a job



Without closing the browser window, you can close a Hyperion Foundation session opened with a SmartCut by using the login command in the URL field of your browser window. The login command is used by appending `/login` to the end of the Browse module URL: `http://database/Hyperion/browse`.

For example, if the SmartCut in the address line is `http://venice/Hyperion/browse/withnav_get/sales/Hyperion`, replace `/withnav_get/sales/Hyperion` with `/login`. The new URL, `http://venice/Hyperion/browse/login`, ends your current session and opens the Hyperion Performance Suite login screen.

Registering a New MIME Type or File Extension

For every type of file you can open on your desktop, your local system maintains the information about which application to launch to open that type of file, and where the application resides.

Your administrator may create new file types (technically, new MIME types), or new file extensions for an existing type. You may be informed of the new type by your administrator, or you may discover it while browsing or trying to open a file. If there is a file type that your browser cannot open, a prompt will ask you what program to use to open it. To avoid that prompt, you need to register the type in your browser or operating system.

The procedure to register a new file extension or MIME type varies according to your operating system, its version, your browser, and the browser's version. For instructions, consult the documentation or online Help of the browser or operating system, or ask your system administrator.

Working with Items and Folders

All tasks described in this section require that you are on the Browse tab of the Browse module.

Moving an Item or Folder

You can move one or more items or folders from the current folder to a different folder. When you move a folder, all of its contents and subfolders move with it. You can move a folder even if it has subfolders which you cannot move directly due to lack of requisite access privileges.

To move items or folders from the current folder to another folder:

1 **Choose Move Items in the action menu.**

The action menu is the shaded area with action buttons and links, located just above the item list.

2 **Optionally, enable Show job output or Show hidden items, or both.**

These options affect what appears in the *Available Items* and *Available Folders list* boxes.

3 **In the *Available Items* list box, select each item you want to move and choose >> (right-facing arrows).**

The item appears in the *Items to Move* list box.

4 **In the *Available Folders* list box, select each folder you want to move and choose >> (right-facing arrows).**

5 **Specify the destination folder in the *Move Items to This Folder* field.**

6 **Choose Move.**

Deleting an Item or Folder

You can delete items and folders for which you have the requisite access privileges.

When you delete a folder, you delete its contents. Therefore, you can delete a folder only if you have sufficient access to delete every item it contains.

To delete one or more items or folders:

1 **Choose Delete Items in Folder in the action menu.**

2 **Optionally, enable Show Job Output or Show Hidden Items or both.**

These options affect what appears in the *Available Items* list box.

3 **In the *Available Items* list box, select each item you want to delete and choose >> (add item button).**

The item appears in the *Items to Delete* list box.

4 **In the *Available Folders* list box, select each folder you want to delete and choose >> (add item button).**

Note You can delete a folder only if you have permission to delete all of its contents.

5 **Enable Cascade-delete subfolders in deleted folders if you want to delete all subfolders within the designated folders (and the subfolders' subfolders, and so on).**

You cannot delete a folder without deleting its subfolders. If you are unsure if the subfolders contain subfolders, it is best to leave the Cascade-delete feature inactive.

6 **Choose Delete.**

Saving a Copy of a File or Job Output

If you wish to have your own copy of a file or job output that is published in the Repository, you can save it to your file system. This copy of the file is independent of the published copy in Hyperion Foundation, and any modifications done to it are not applied to the Repository copy. For information on editing published files see "Modifying a Published Item" on page 6-7.

To save a copy of a file or job output:

1. **Select the item in the Browse listing.**
2. **While you are viewing the item, use your browser's Save As command (usually under the File menu).**

Creating a Folder

You can easily add folders to organize and contain the items in the Repository.

To create a new folder:

1. **Navigate to the folder in which you want to create the new folder.**

2. **In the action menu, choose Add Folder.**
3. **Enter a name for the new folder.**
4. **Enter or change other properties as desired.**

   For information on the properties fields, see Chapter 6, "General Publishing."
5. **Choose Finish to save your changes.**

Viewing or Modifying Properties of a Folder

Folder properties include the description of the folder, the owner, the Smartcut, the option of hiding the file, and the access control information.

To view or modify a folder's properties:

1 **Select the folder in the Navigation pane.**

The folder's contents are listed.

2 **Choose Folder Properties.**

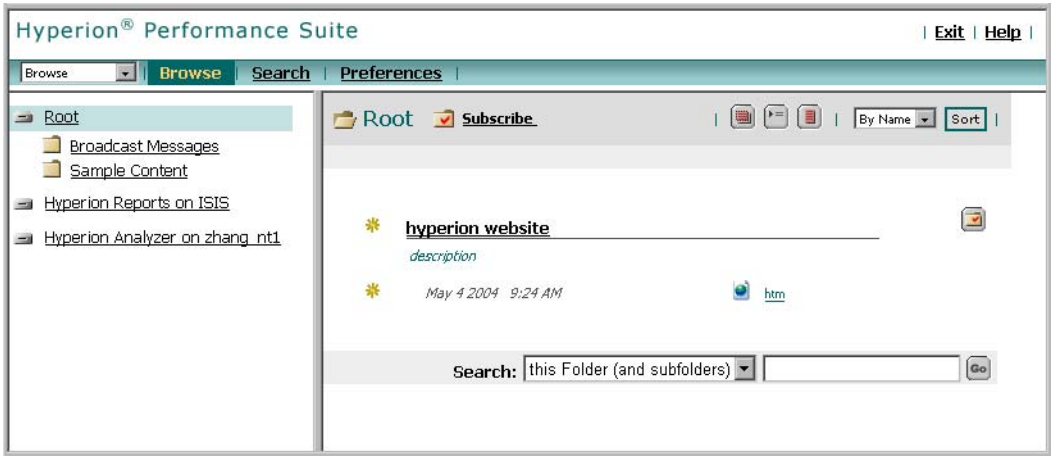
For information on the properties, choose **Help** or see Chapter 6, "General Publishing."

Viewing Related Content

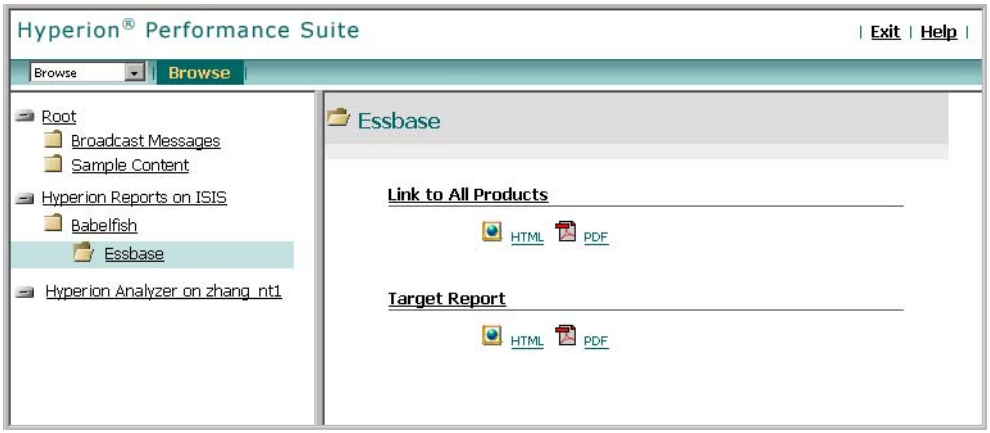
Related Content refers to the links in the navigation pane to other Hyperion applications. You can view Hyperion Reports and Hyperion Analyzer content. If you have no Related Content links, ask your administrator if this feature is supported at your site.

To view Related Content:

1 **Select a link to the application and server in which your content is located in the navigation pane.**



2 **Select the format in which you want to view the document under the document name in the content pane.**



Searching

Use Hyperion Foundation's search feature to find items in the repository. The search feature finds items based on keywords that were either specified when the item was published or generated automatically. Keywords are generated from the item's name and description and for BQY content, from the section names.

The system returns documents with one or more keyword matches. When there is a keyword match on a job, the job output is also returned in the search.

You cannot search content from Hyperion Reports or Hyperion Analyzer (related content) through this search feature.

Keywords

Enter the keywords that describe the information that you want and select the method by which to search. Items stored in the Repository have a set of keywords that characterize the information that they contain. By using AND, you can specify that retrieved items must match all keywords specified; with OR you, can specify that an item should be retrieved if at least one keyword matches the keywords stored with the item. Keywords must be entered without spaces, and keyword phrases are not supported.

You can enter keywords using any case. For example, if you enter the word Java, the search feature returns a list of items stored with the keywords JAVA, Java, and java.

Where to Search

You can specify that the search should be restricted to the last folder that you browsed (and any subfolders of this folder) or that the search should look for items in all folders.

Search Options

You can limit the search to specific types of information presented in the drop-down list. You can also specify the maximum age of items you are interested in. For example, all items that were published or updated within the last two months.

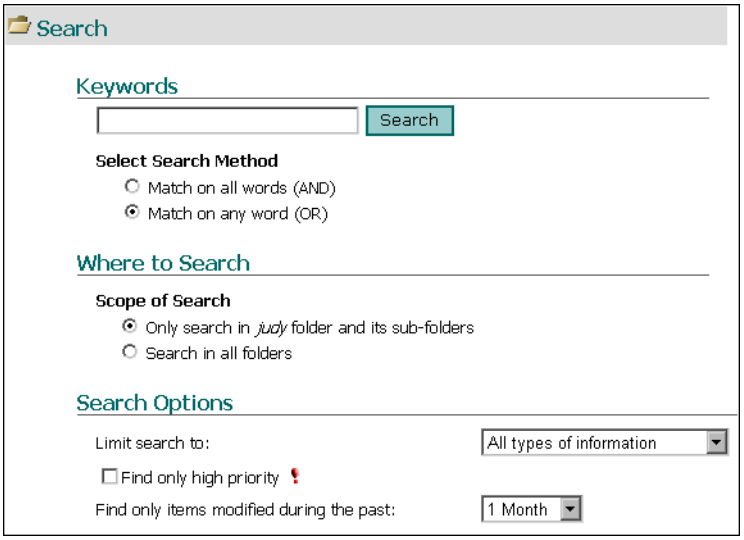
You can select any combination of these options. If more than one option is specified, only items that match each of the criteria are returned. For example, you could search for Word documents that were published to the Repository in the last week.

Searching

Use the search tab from the Browse module to search for items. You can perform a detailed search for information from the Search page. To limit the search, you can specify keywords to search on, the scope of the search and other search options, such as the type of document to find.

To search for items:

1 **Select the Search tab in the Browse module and select Go.**



2 **Specify keywords to search on.**

3 **Select which folders to search in the Where to Search section.**

4 **Specify search options.**

You can specify the type of document and the timeliness of the items to return.

Only items that match all of the search options criteria are returned. For example, you could search for Word documents that were published to Hyperion Foundation in the last week.

5 **Select Search.**

Your search results appear in the Content pane.

Summary

In this chapter, you have learned how to work with folders and items, how to view and modify properties, and how to search the Repository.

3 Browse Preferences

The Preferences tab of the Browse module allows you to customize the Browse environment. You can set your default email address for subscriptions notices, your default publishing access privileges, and many other default settings.

In This Chapter

Setting Preferences in Browse 3-2
Display Preferences 3-3
Publishing Preferences 3-9
Intelligence iServer Preferences 3-20
Related Content Preference 3-21
Pass-through Preferences 3-22

Setting Preferences in Browse

You can customize the Browse module environment by setting or changing the Browse Preferences.

To access Browse Preferences:

1 **In the Browse module, choose the Preferences tab.**

2 **Choose a category of Preferences in the Navigation pane.**

3 **Fill in the preferences you wish to change and choose Save Preferences.**

Refer to the following sections for details on the Browse preferences.

Display Preferences

You can customize the look and feel of the browse module with the following Display Preferences:

- General Preferences
- Browse Preferences
- Versions Preferences
- New Item Highlight Preferences
- Display Results Preferences

General Preferences

The General Preferences page (Figure 3-1) allows you to designate the default folder you want Browse to open as you log on, set up your default email address for notifications, select a new password, and enable 508 compliance features.

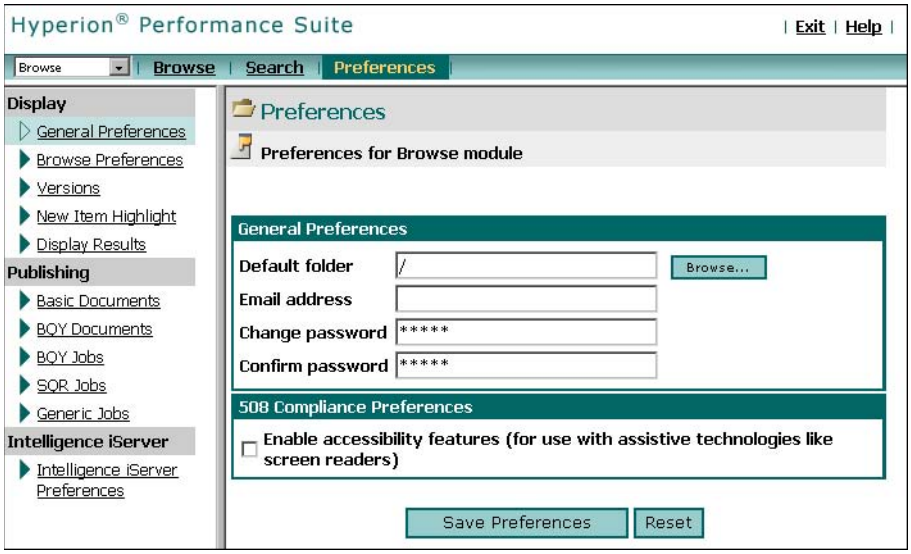


Figure 3-1 General Browse Preferences

General Preferences

You can modify the following General Preferences:

- **Default Folder** – Enter the name of the folder you want Browse to initially open or choose Browse to select the folder from a list. Your default folder should be the folder you access most frequently.
- **Email Address** – Enter the email address you want the Hyperion Foundation system to default to when sending your subscribe and job notifications. You can overwrite this default by entering a different email address when publishing or modifying files or jobs.
- **Change Password/Confirm Password** – Enter a new password and confirm it to change your logon password for the system.

508 Compliance Preferences

Select **Enable accessibility features (for use with assistive technologies like screen readers)** to enable the 508 compliance feature. For example, this feature adds a **Go** button to the Module menu. See the online help or the *Hyperion Performance Suite Accessibility Guide* for more details.

Browse Preferences

Browse Preferences (Figure 3-2) allow you to show the advanced options when publishing items or modifying or viewing properties and to automatically generate keywords for searching.

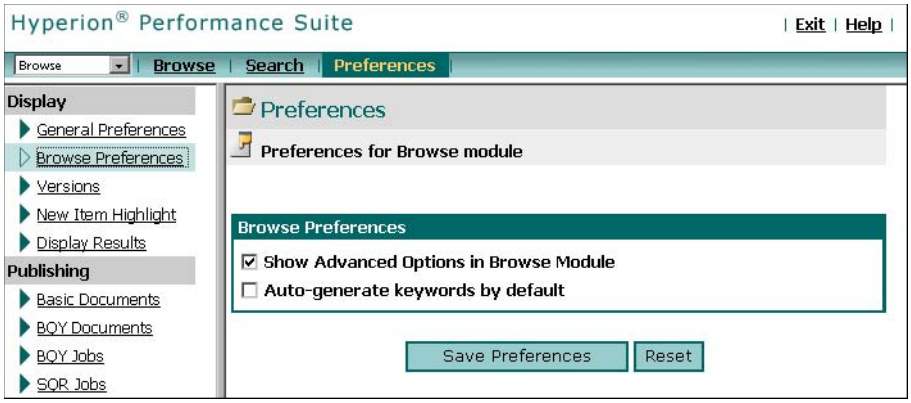


Figure 3-2 Browse Preferences

You can enable the following Browse Preferences:

- **Show Advanced Options in Browse Module** – Enable this preference if you want advanced options to be displayed when you publish items or modify and view properties. When this preference is disabled, the advanced options do not appear at all. When this preference is enabled, the advanced options are available, but may be hidden.
- **Auto-generate keywords by default** – Enable this preference to have the system auto-generate keywords when you publish an item.

Versions Preferences

Each item in the system can have multiple versions. The Versions preferences, displayed in Figure 3-3 allow you to choose the number of versions displayed in the Browse module.

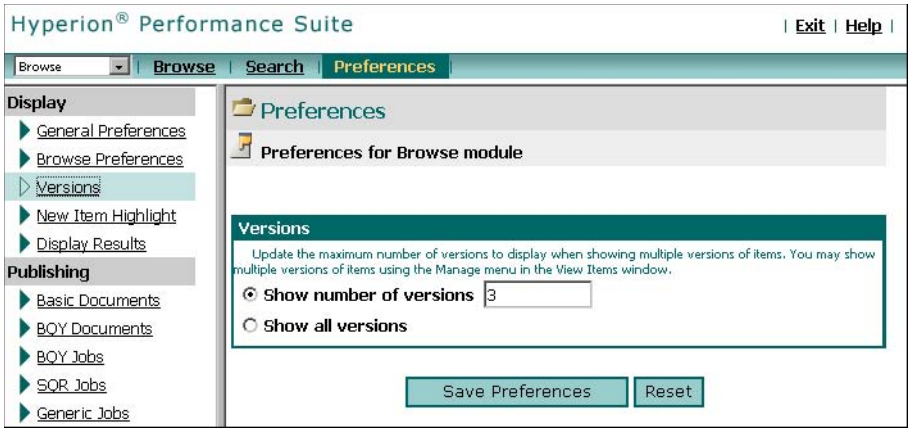


Figure 3-3 Versions Preferences

You can enable the following Versions preferences:

- **Show number of versions** – Select this preference to limit the number of versions per item you want listed in Browse. Enter the number in the field (default is 3).
- **Show all versions** – Enable this preference to display all versions in Browse.

New Item Highlight Preferences

The New Item Highlight preference (Figure 3-4) allows you to highlight newly published or modified items for a specified time period with a yellow asterisk.

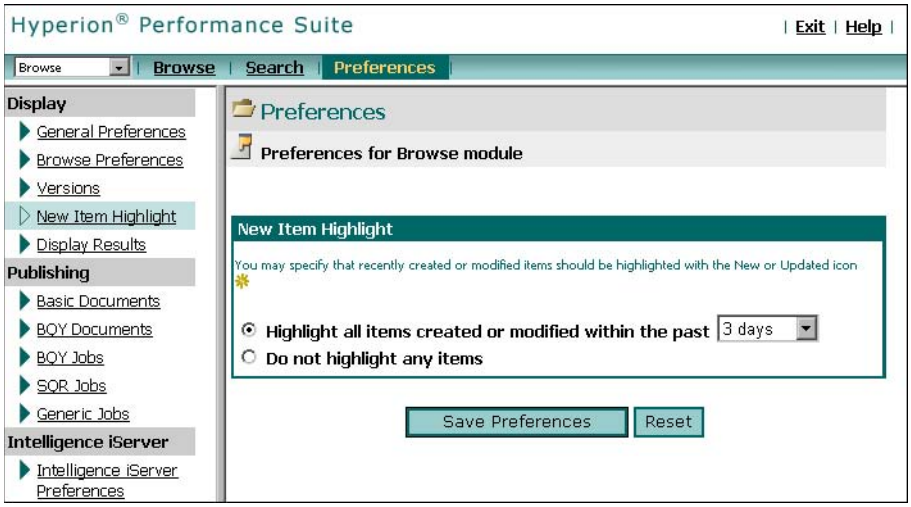


Figure 3-4 New Item Highlights Preferences

Choose between the following New Item Highlight preferences:

- **Highlight all items created or modified within the past** – Select and enter how long you want new items highlighted (default is 3 days).
- **Do not highlight any items** – Select to leave newly published or modified items unmarked.

Display Results Preferences

The Display Results preferences (Figure 3-5) allow you to display your search results on one page or on multiple pages.

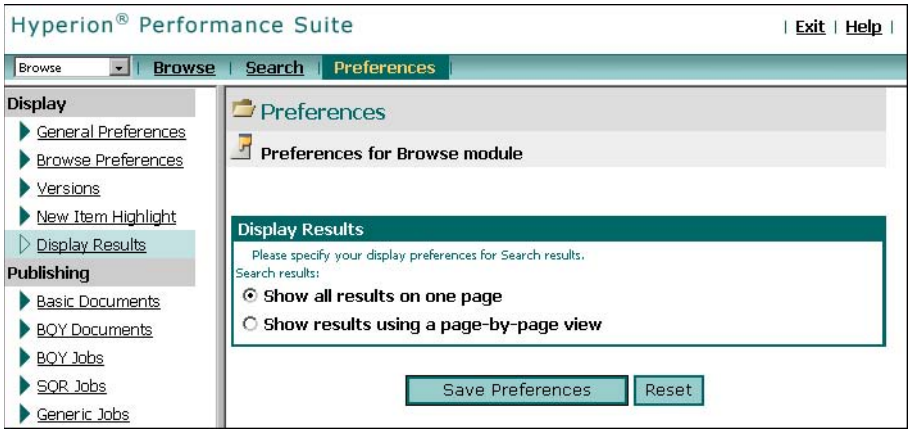


Figure 3-5 Display Results Preferences

Choose from the following search results preferences:

- **Show all results on one page** – Displays search results on one page.
- **Show results using a page-by-page view** – Displays search results on multiple pages. The page-by-page option is the system default.

Publishing Preferences

The Publishing preferences allow you to set your default access privileges for basic documents, BQY files or jobs documents, BQY jobs, SQR jobs, and generic jobs and allow you to set the default scanning folder for SQR jobs. These access privileges are the access control defaults for the items that you publish. By setting access privileges you can control which Hyperion Performance Suite users can view and/or modify the items you publish. You can modify these defaults whenever you wish or set different access privileges for specific items at publishing time.

Note These defaults are applied to the items that are published after the default is set. These defaults do not impact items that have already been published.

Advanced Options

Publishing preferences also include one option from the Advanced options page, *Enable for View Manager module*. Enabling this preference allows users, who have the proper access privileges, to add the selected document to their Dashboard subscriptions. This preference can be set on the publishing preferences page for each item type.

To set your default advanced options:

➤ **Select or de-select *Enable for View Manager module* on the publishing preference page for basic documents, BQY documents, BQY job output, SQR job output, or generic job output.**

The initial default for BQY documents and BQY jobs is enabled. The initial default for basic documents, SQR jobs, and generic jobs is disabled.

The following sections offer instructions on setting your default publishing access privileges for all types of items.

Default Access Privileges for Basic Documents

As with all content that you publish, you can give roles, groups, or individual users access privileges to your basic documents. Table 3-1 briefly describes the four types of access privileges you can assign.

Table 3-1 Access Privileges

Access Privilege	Access Level Allowed
No access	Cannot access the document in any manner
View	Can view the item
Modify	Can make changes, but not delete
Full control	Can view, modify, delete, and change access privileges

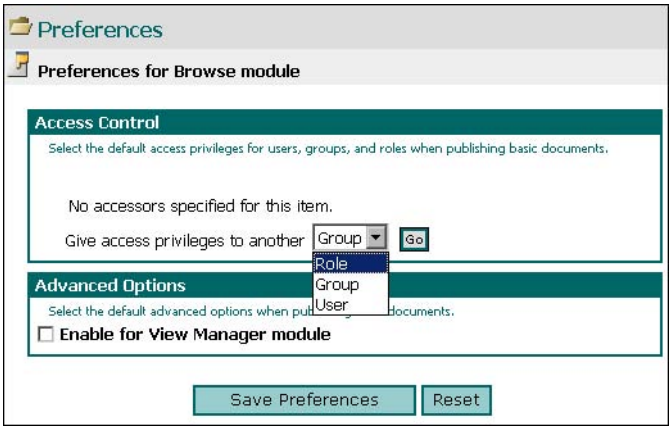
Tip If individual users belong to the same group or have been assigned a particular role, it is more efficient to give access privileges either to groups or roles, rather than to individual users.

To set the default access privileges for basic documents that you publish:

1 **From the Browse module Preference tab, select Basic Documents in the Navigation pane.**

The Access Control section appears.

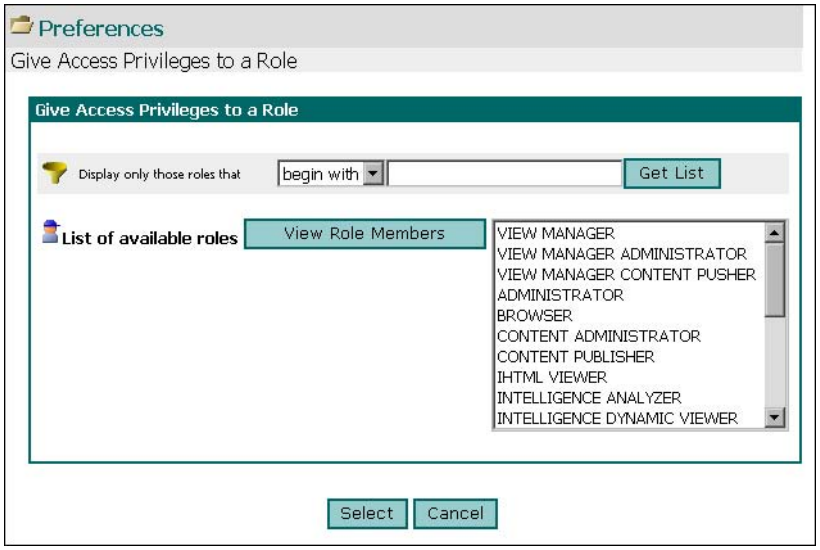
2 **Select Role, Group, or User from the *Give Access Privileges to another* drop-down list and choose Go.**



The Give Access Privileges to a Role/Group/User page appears.

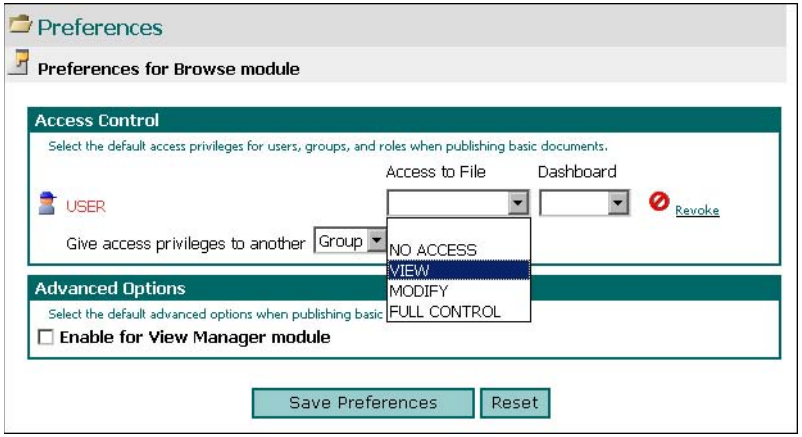
3 Filter the role, group, or user list by selecting **begin with**, **contain**, or **are in group** from the *Display only those roles/groups/users that* drop-down list, enter the letters or group name, and choose **Get List**.

(The *are in group* option is not an available filter for the role list.)



4 From the list that appears, select the role, group, or user to which you want to give access privileges and choose **Select**.

5 Select the access privilege from the drop-down list next to the new user, group, or role.



Choose from the following access privileges:

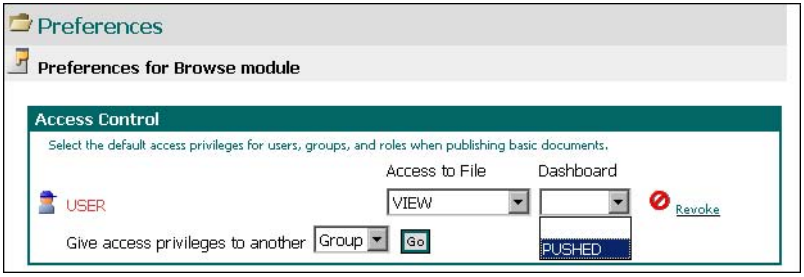
- **No access** – Cannot access the document in any manner
- **View** – Can only view the document
- **Modify** – Can make changes, but not delete
- **Full control** – Can display, change, and delete

6 **Repeat Step 2 through Step 5 to set additional access privileges for other users, groups, or roles.**

7 **If you have the View Manager Content Pusher role, you have the option to push this item to selected users/groups/roles. If you do not wish to push this item, skip to Step 8.**

a. Select the *Push this item to selected Users, Groups, and Roles* check box.

This check box enables the Dashboard drop-down list for each user, group, and role listed in the Access Control section.



b. Select **PUSHED** from the **Dashboard** drop-down list next to the users, groups, and roles to which you want to push the item.

Pushed items appear in the View Manger module.

8 Choose **Save Preferences.**

Default Access Control for BQY Documents

For BQY documents, you selectively grant not only access privileges, but also adaptive states. For information on adaptive states, see "Setting Access Privileges on BQY Documents" on page 6-12.

To set default access control for BQY documents that you publish:

1. **From the Browse module Preferences tab, choose BQY Document in the Navigation pane.**

   The Access Control section appears.

2. **Select Role, Group, or User from the Give Access Privileges to another drop-down list and choose Go.**

   The **Give Access Privileges to a Role/Group/User** page appears.

3. **Filter the role, group, or user list by selecting begin with, contain, or are in group from the Display only those roles/groups/users that drop-down list, enter the letters or group name, and choose Get List.**

   (The **are in group** option is not an available filter for the role list.)

4. **From the list that appears, select the role, group, or user to which you want to give access privileges and adaptive states and choose Select.**

5. **Select the access privilege from the drop-down list next to the new user, group, or role.**

6. **Select the adaptive state for this role, group, or user.**

   Table 6-2 on page 6-13 describes the adaptive states.

7. **Repeat Step 2 through Step 6 to set access control for BQY documents for other roles, groups, or users.**

8. **If you have the View Manager Content Pusher role, you have the option to push this item to selected users/groups/roles. If you do not wish to push this item, skip to Step 9.**

   a. Select the *Push this item to selected Users, Groups, and Roles* check box.

      This check box enables the Dashboard drop-down list for each user, group, and role listed in the Access Control section.

   b. Select **PUSHED** from the **Dashboard** drop-down list next to the users, groups, and roles to which you want to push the item.

      Pushed items appear in Dashboards.

9. **Choose Save Preferences.**

Default Access Control for BQY Jobs

You set default access control for BQY jobs from the Preferences tab in the Browse module. In addition to setting access privileges and adaptive states for the BQY job, you also set access privileges to the job output. Table 3-2 shows the access privileges for BQY jobs.

Table 3-2 Access to BQY Jobs

Access Privilege	Access Level Allowed
No access	Cannot access the document in any manner
View	Can view the item
Run	Can run the job
Modify and Run	Can make changes to the job and run it
Full Control	Can modify, run, delete, change access privileges

To set default access control for BQY jobs:

1. **From the Browse module Preferences tab, choose BQY Jobs in the Navigation pane.**

   The Access Control section appears.

2. **Select Role, Group, or User from the Give Access Privileges to another drop-down list and choose Go.**

   The **Give Access Privileges to a Role/Group/User** page appears.

3. **Filter the role, group, or user list by selecting begin with, contain, or are in group from the Display only those roles/groups/users that drop-down list, enter the letters or group name, and choose Get List.**

   (The **are in group** option is not an available filter for the role list.)

4. **From the list that appears, select the role, group, or user to which you want to give access privileges and adaptive states and choose Select.**

   The screen displays three drop-down lists: **Access to Job**, **Access to Job Output**, and **Adaptive State**.

5 **In the Access to Job box, select the access privilege for this role, group, or user.**

Access privileges for BQY jobs include **Modify and Run** (can make changes and run jobs, but not delete) in addition to the standard access privileges. See Table 3-2 for a description of access privileges for BQY jobs.

6 **In the Access to Job Output, select the access privilege to the job output.**

7 **In the Adaptive State box, select the adaptive state for this role, group, or user.**

Table 6-2 describes the adaptive states.

8 **Repeat Step 2 through Step 7 to set access control for BQY jobs for other roles, groups, or users.**

9 **If you have the View Manager Content Pusher role, you have the option to push the output of this job to selected users/groups/roles. If you do not wish to push the output, skip to Step 10.**

a. Select the *Push this item to selected Users, Groups, and Roles* check box.

This check box enables the Dashboard drop-down list for each user, group, and role listed in the Access Control section.

b. Select **PUSHED** from the **Dashboard** drop-down list next to the users, groups, and roles to which you want to push the item.

Pushed items appear in Dashboards.

10 **Choose Save Preferences.**

Default Access Control for SQR and Generic Jobs

You set default access control for SQR or generic jobs and job output from the Preferences tab in the Browse module. For SQR jobs, you can also set default folders to scan for required files. Table 3-2 shows the access privileges for SQR and generic jobs.

Table 3-3 Access to SQR and Generic Jobs

Access Privilege	Access Level Allowed
No access	Cannot access the document in any manner
View	Can view the item
Run	Can run the job
Modify and Run	Can make changes to the job and run it
Full Control	Can modify, run, delete, change access privileges

Setting Default Access Control for SQR and Generic Jobs

To set default access control for SQR and generic jobs:

1. From the Browse module Preferences tab, choose **SQR Jobs** or **Generic Jobs** in the Navigation pane.

   The Access Control section appears.

2. Select Role, Group, or User from the **Give Access Privileges to another** drop-down list and choose **Go**.

   The **Give Access Privileges to a Role/Group/User** page appears.

3. Filter the role, group, or user list by selecting **begin with**, **contain**, or **are in group** from the **Display only those roles/groups/users that** drop-down list, enter the letters or group name, and choose **Get List**.

   (The **are in group** option is not an available filter for the role list.)

4 **From the list that appears, select the role, group, or user to which you want to give access privileges and choose Select.**

The screen displays two drop-down lists: **Access to Job** and **Access to Job Output**.

5 **In the Access to Job box, select the access privilege for this role, group, or user.**

Access privileges for SQR and generic jobs include **Modify and Run** (can make changes and run jobs, but not delete) in addition to the standard access privileges. See Table 3-3 for a description of access privileges for SQR and generic jobs.

6 **In the Access to Job Output, select the access privilege to the job output.**

7 **Repeat Step 2 through Step 6 to set access control for SQR or generic jobs for other roles, groups, or users.**

8 **If you have the View Manager Content Pusher role, you have the option to push this job's output to selected users/groups/roles. If you do not wish to push the output, skip to Step 9.**

a. Select the *Push this item to selected Users, Groups, and Roles* check box.

This check box enables the Dashboard drop-down list for each user, group, and role listed in the Access Control section.

b. Select **PUSHED** from the **Dashboard** drop-down list next to the users, groups, and roles to which you want to push the item.

Pushed items appear in Dashboards.

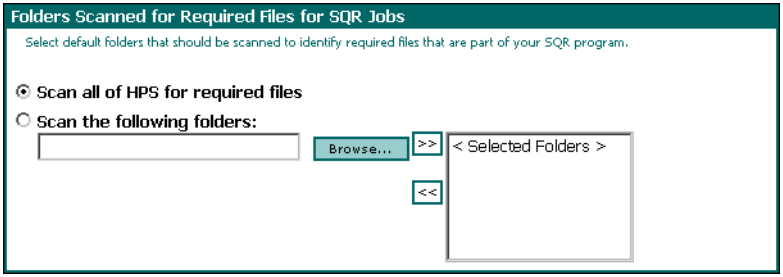
9 **Choose Save Preferences.**

Setting a Default Scanning Folder for SQR Jobs

You can also set which folders you want the system to scan when looking for required files for your SQR jobs. The default is to scan the entire Root folder structure.

To select the default folders to be scanned for SQR job required files:

1. Select SQR Jobs in the navigation pane of the Browse module Preferences page.
2. Under the section Folders Scanned for Required Files for SQR Jobs, choose *Scan all of HPS for required files* or choose *Scan the following folders* to set your default folders.



3. Select specific folders using the Browse button.
4. Use the arrows to add or delete folders from the list box.
5. Choose **Save Preferences**.

Intelligence iServer Preferences

The Intelligence iServer preferences (Figure 3-6) allow you to display BQY documents in a separate browser window. You can also specify the default format for dates and numbers.

Note The date and number formats set here are used to display dates and numbers that have not been explicitly formatted by the BQY designer.

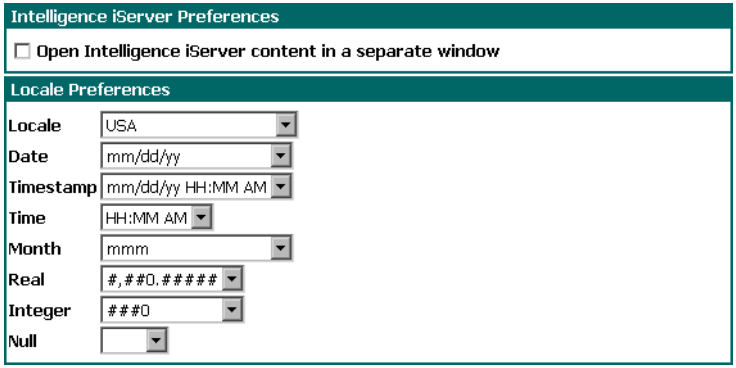


Figure 3-6 Intelligence iServer Preferences

Set your Intelligence iServer preferences:

- **Open Intelligence iServer content in a separate window** – Select to display the Intelligence iServer content in a separate browser window. Content is displayed in the same browser window by default.
- **Locale Preferences** – Select a locale from the drop-down list. The typical format for the selected locale automatically populates the date and number fields. Each date and number field can then be set to a different format individually.

Related Content Preference

The Related Content preference (Figure 3-7) allows you to display Related Content documents in a separate browser window.

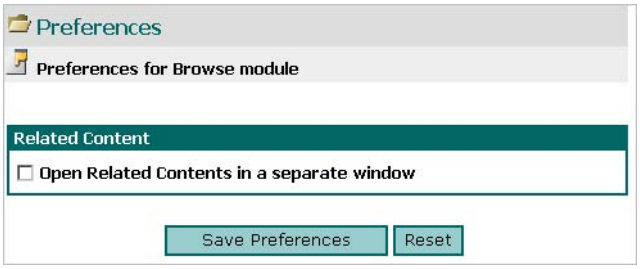


Figure 3-7 Related Content Preferences

Select to open Related Content (content from other Hyperion applications) in a separate window and de-select to open Related Content in the same window you are already using.

Pass-through Preferences

If enabled by your administrator, pass-through allows you to access data sources without entering a user name and password for each data source. If your administrator has set up pass-through to use user-specified credentials, you must specify a username and password in the Pass-through Settings page of Browse Preferences. If your administrator has set up pass-through to use login credentials, then the Pass-through Settings page is unavailable, and you do not need to enter additional credentials.

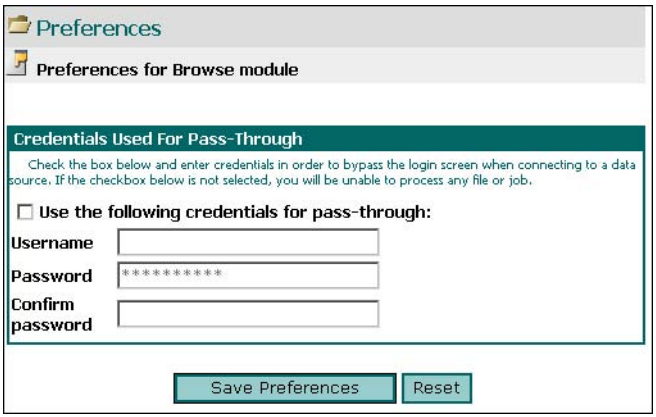


Figure 3-8 Credentials Used For Pass-Through Screen

Set your Credentials Used For Pass-Through:

- **Use the following credentials for pass-through** – Select to allow the system to use the username and password you enter in the Username and Password fields. If you do not select this option, you will not be able to process items using data sources.
- **Username** – Type a user name to be used for pass-through.
- **Password** and **Confirm password** – Type a password to be used for pass-through.

Note If you have problems accessing a data source when using pass-through, you should contact your administrator for assistance.

Summary

In this chapter you learned how to set default preferences for viewing and publishing items in the Browse and Search tabs of the Browse module.

4 Using View Manager and Personal Pages

View Manager and Personal Pages are web modules that allow you to tailor your display of Hyperion Performance Suite items according to your business needs.

View Manager displays and lists all of your pushed and subscribed items. Your designated default item or the first item on your list appears in the content pane when you first open the View Manager module.

Personal Pages are customizable pages that enable you to quickly view the Hyperion Performance Suite information and other web content that is important to you. You can modify the content and layout of Personal Pages, create additional Personal Pages, and copy and customize published Personal Pages. The first time you log into Hyperion Performance Suite, the administrator defined default Personal Page appears. You can modify the content, layout, and colors of this Personal Page, as well as add other Personal Pages.

In This Chapter

Using the View Manager Module 4-2
About Personal Pages 4-8
Customizing Personal Page Content 4-10
Working With Personal Pages 4-34
Accessing Personal Page Preferences 4-44

Using the View Manager Module

You can manage all aspects of your subscribed and pushed items through the View Manager module. Review these topics:

- Using the View Tab
- Using the Manage Tab

Using the View Tab

In View Manager, you can view items that you subscribe to and items that are pushed to you by an administrator or other users. These items include documents, job output, dashboards, and other Hyperion Performance Suite items.

The View Manager View tab displays the default item in the Content pane the first time the View Manager is opened per session. This default is either the first item in the drop-down list, or it is the default you specify on the Manage tab. Refer to "Changing the Default Item" on page 4-5 for instructions on changing the default item.

In addition to viewing the default item, you can select other items to view from the View drop-down list as illustrated in the Figure 4-1. By default, all of your pushed and subscribed items appear in the View drop-down list. From the Manage tab, you can remove or add any dashboard to the View drop-down list. Refer to "Displaying Items in the View Drop-down List" on page 4-6 for instructions on changing the items in the View drop-down list.

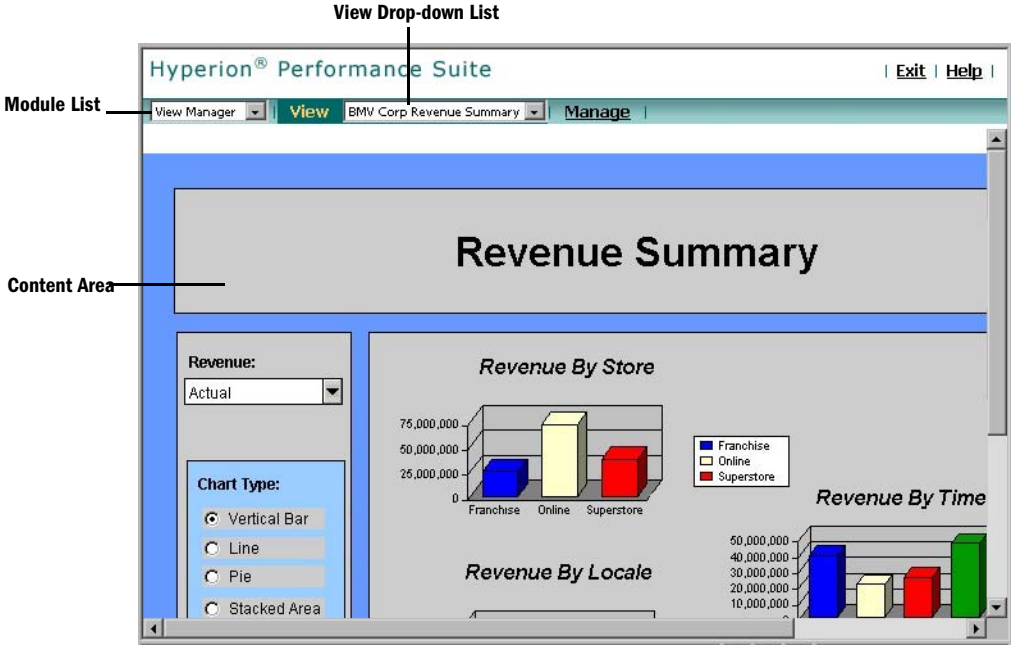


Figure 4-1 View Tab

To select another item from the View drop-down list:

➤ **Choose the down arrow on the drop-down list and select another item from the list.**

The selected item opens in the Content pane.

Using the Manage Tab

The Manage tab displays an alphabetical list of all your subscribed and pushed items. You use the Manage tab to modify what appears in the View tab. Each item in the list has these check boxes next to it:

- **View Dropdown** – Use to add or remove an item from the View drop-down list. By default, all items are listed in the View drop-down list.
- **Default** – Use to select a default dashboard. If none is selected, the first item in the alphabetical list is displayed. The default dashboard is displayed the first time the View Manager is opened per session.
- **Remove from View Manager** – Use to remove the item from the Manage list. This check box is disabled if the item is pushed to you.

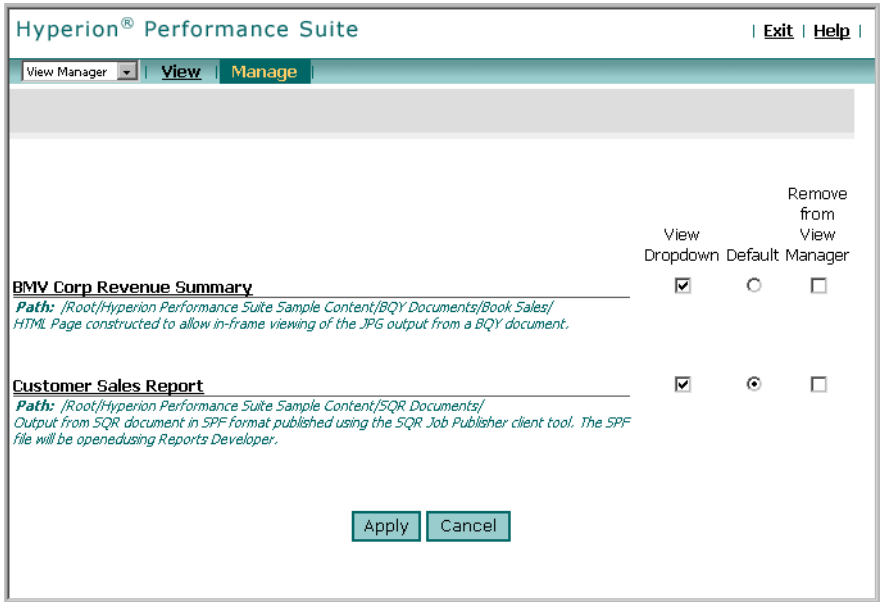


Figure 4-2 Manage Tab

Changing the Default Item

You can change the item that appears when you first open the View tab of the Dashboard module.

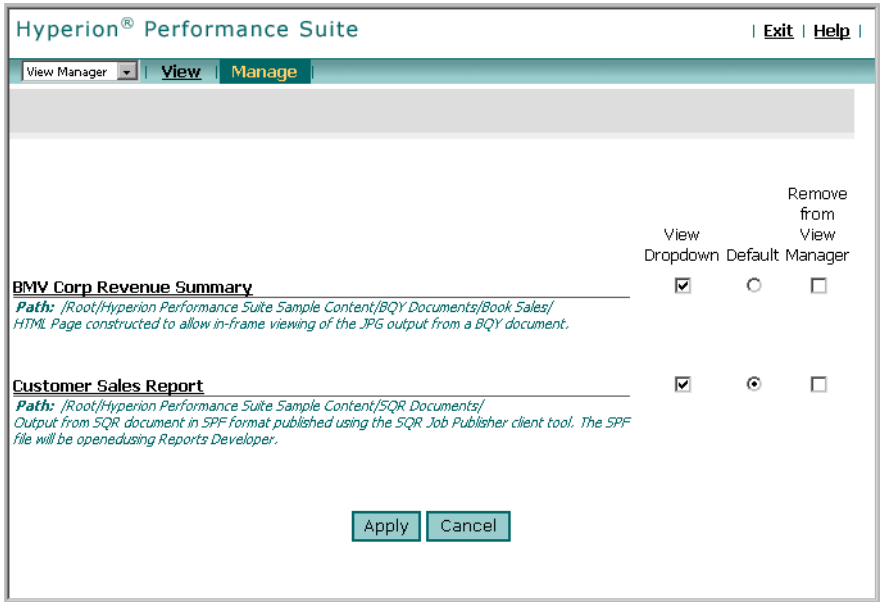
To change your default item:

1 **In the View Manager module, select the Manage tab.**

2 **Select the Default radio button next to the item you want to make your default item.**

If no default is selected, the first item on the Manage list is displayed.

Only items with the View Dropdown check box selected can be used as the Default item. The default dashboard automatically displays the first time View Manager is opened per session.



3 **Choose Apply.**

Displaying Items in the View Drop-down List

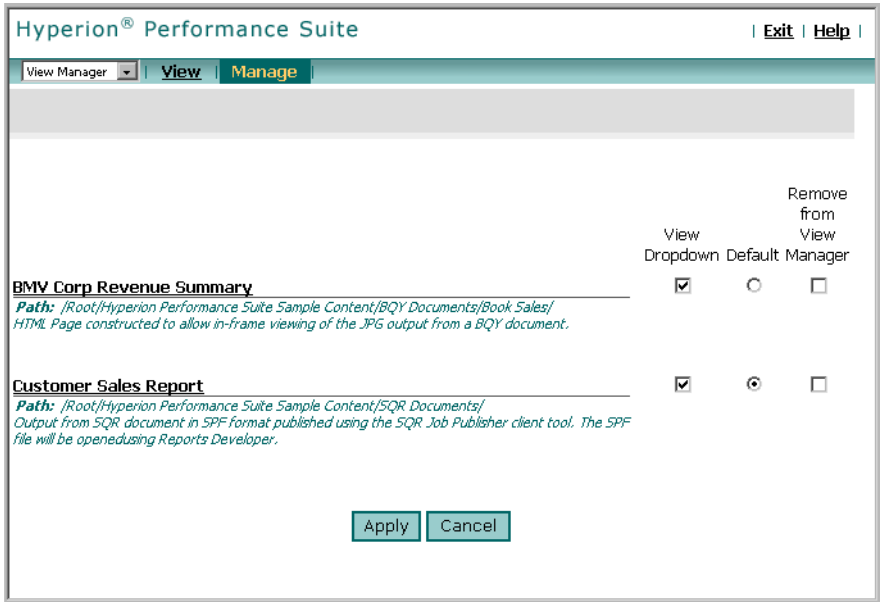
By default, all items appear in the View drop-down list.

To add or remove items to/from the View list:

1 **In the View Manager module, select the Manage tab.**

2 **Select or de-select the View Dropdown check box next to the item you want to add to or remove from the drop-down list.**

An item that has the View Dropdown check box selected appears in the list. An item that does not have the View Dropdown check box selected does not appear in the list.



3 **Choose Apply.**

Removing items from the View drop-down list does not remove them from the Manage tab. Refer to the following section for instructions on permanently removing items from the Manage tab.

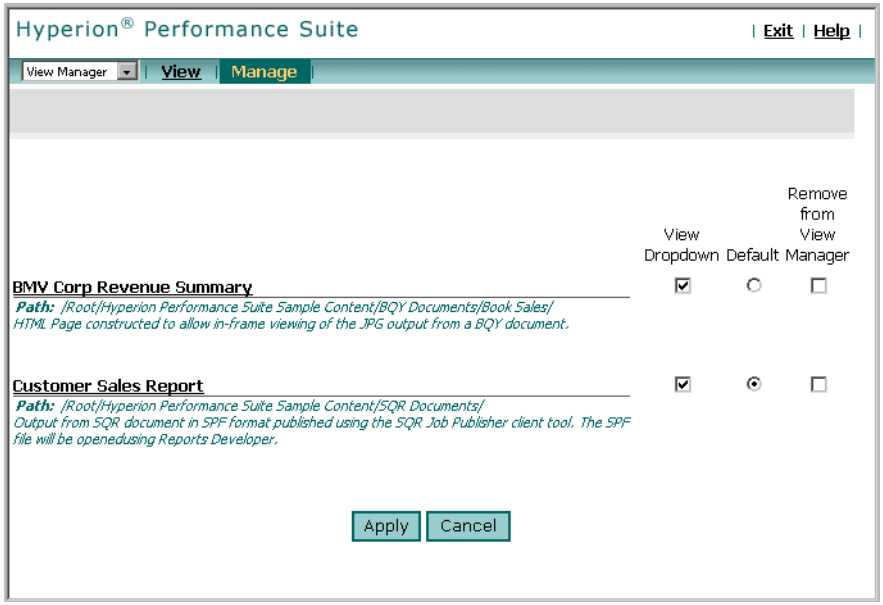
Removing Items from The Manage Tab

You can remove any subscribed item from the Manage tab. Pushed items cannot be removed.

☆ Tip An alternative to removing pushed items from the Manage tab, which cannot be removed, is to remove them from the View drop-down list. This way, you do not view them when using the View tab. Refer to "Displaying Items in the View Drop-down List" on page 4-6 for details about removing items from the drop-down list.

To remove items from the Manage tab:

1. **In the View Manager module, select the Manage tab.**
2. **Select the Remove from View Manager check box next to the item you want to remove from the Manage tab.**



3 Choose **Apply.**

This permanently removes the item from the Manage tab and disables your ability to view it in the View Manager module. However, you can subscribe again to the item in Browse module. Refer to "Adding an Item to the View Manager Module" on page 5-4 for detailed instructions.

Note In some cases, you attempt to remove an item that you subscribed to from the View manage tab only to find it still listed on the page. This item was also pushed to you in addition to you having subscribed to it. You can remove subscribed items, but you cannot remove pushed items.

About Personal Pages

The components that make up a Personal Page are called content windows and file content windows. *Content windows* can be collections of links to Hyperion Performance Suite items or external sources, image bookmarks, and Broadcast Messages. *File content windows* display the contents of job output, BQY sections, and other HTML files.

You can add or remove content windows or file content windows. All content windows and file content windows are optional except Broadcast Messages. You cannot remove Broadcast Messages, nor delete a Personal Page that displays them, unless you have another Personal Page that displays the Broadcast Messages.

Content on Personal Pages include:

- **Broadcast Messages** – A special folder that the Hyperion Performance Suite administrator populates. The contents of this folder are displayed as one or more content windows that appear to *every* user.
- **Image bookmarks** – Graphic links to web pages or Hyperion Performance Suite items.

- **HTML file or job output displayed as a file content window** – A Hyperion Performance Suite HTML item whose contents are displayed on a Personal Page. An example is the Personal Dashboard shown in Figure 4-3. URLs can also be made displayable.
- **Exceptions Dashboard** – Monitored exceptions. You add exception indicators to this dashboard. Each indicator represents one exception-capable report.
- **Displayable BQY sections** – Sections from BQY files and job output from BQY jobs that you have access to.
- **My Bookmarks** – A collection of links to web pages or Hyperion Performance Suite items.

Figure 4-3 shows a variety of content windows and file content windows.

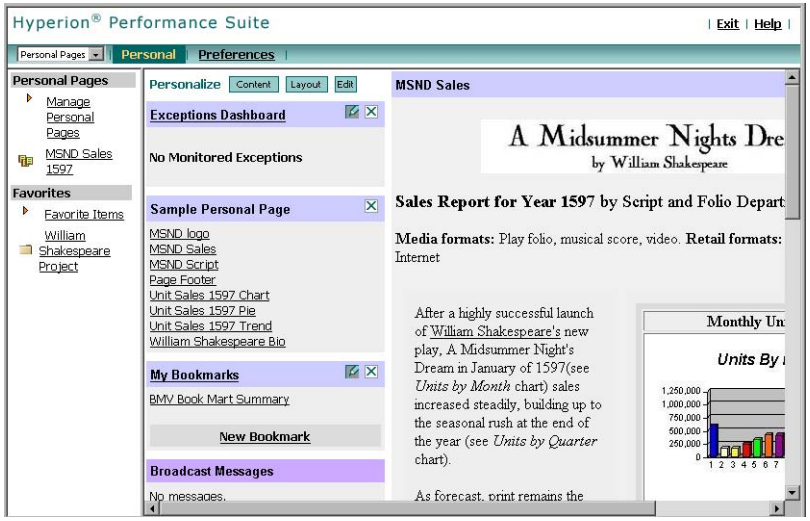


Figure 4-3 Sample Personal Page

Note If your administrator configured the use of heading bars, each content window's title appears in a colored heading on the Personal Pages.

Customizing Personal Page Content

You can specify the information that is included on, as well as the appearance of, your Personal Pages. Things you can do to customize your Personal Pages include:

- Adding Personal Page Contents
- Modifying the Layout of a Personal Page
- Changing the Colors on a Personal Page
- Displaying HTML Content on Personal Pages
- Creating Bookmarks
- Using the Exceptions Dashboard
- Embedding BQY Document Sections in Personal Pages

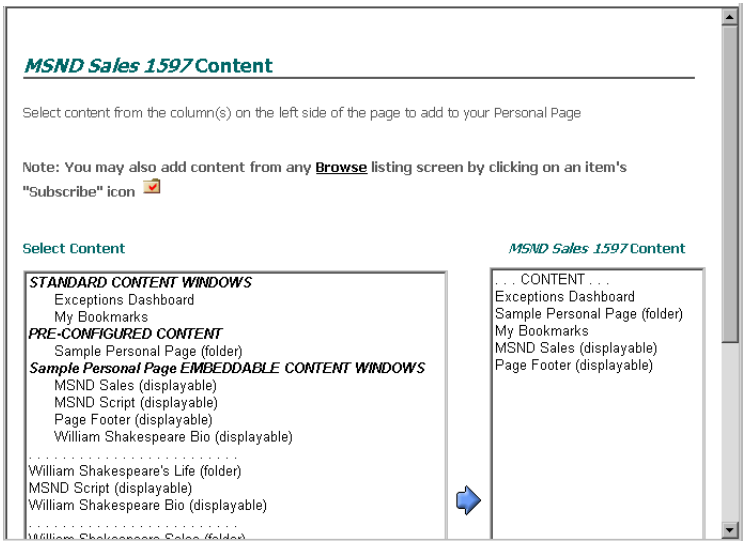
Adding Personal Page Contents

To add content (content windows) to a Personal Page:

1 **In the Personal Pages module, choose Content in the Personalize menu.**

The My Personal Pages page appears in the Content pane.

2 **Select the content you want to add from the Select Content list box.**



The items listed here under content are controlled by your administrator. You can also add content through the subscribe feature. See “Subscribing” on page 5-1.

3 **Choose the right-facing arrow to move the selected content to the My Personal Page Content list box on the right.**

4 **Choose Save Settings at the bottom of the page.**

Removing Personal Page Contents

To remove content (content windows) from a Personal Page:

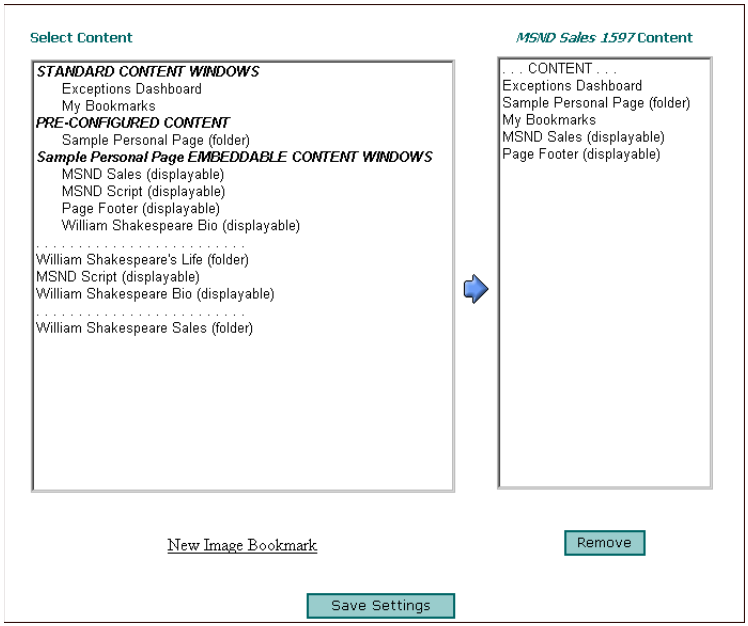
➤ **Choose X in the title of the content window you wish to remove.**

Or:

1 **In the Personal Pages module, choose Content in the Personalize menu.**

The My Personal Pages page appears in the Content pane.

2 **Select the content you want to remove from the My Personal Page Content list box on the right and choose Remove.**



3 **Choose Save Settings.**

Displaying HTML Content on Personal Pages

You can add an HTML Hyperion Performance Suite document/output file as a file content window on a Personal Page.

HTML job output from SQR jobs and generic jobs must be enabled in order to display the HTML job output as a file content window.

Displaying an HTML File on a Personal Page

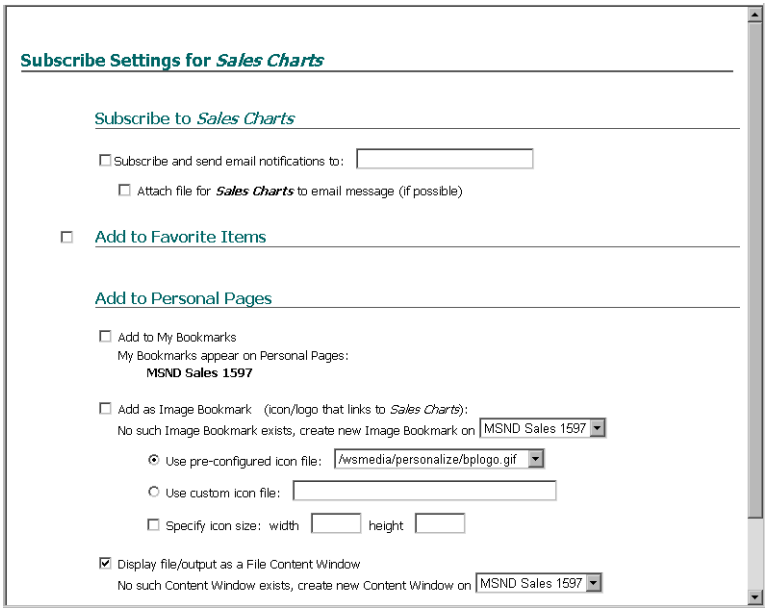
To display an HTML file on a Personal Page:

1. Select **Browse**.

2. Navigate the folders till you find the document you want to add to your Personal Page and choose the document's **Subscribe** button.

3. On the Subscribe Settings page, select **Display file/output as a File Content Window**.

   If this option is not on the Subscribe Settings page, this file/output cannot be displayed as a file content window.



4. From the *No such Content Window exists, create new Content Window on* drop-down list, select a **Personal Page** on which to display the file/output.

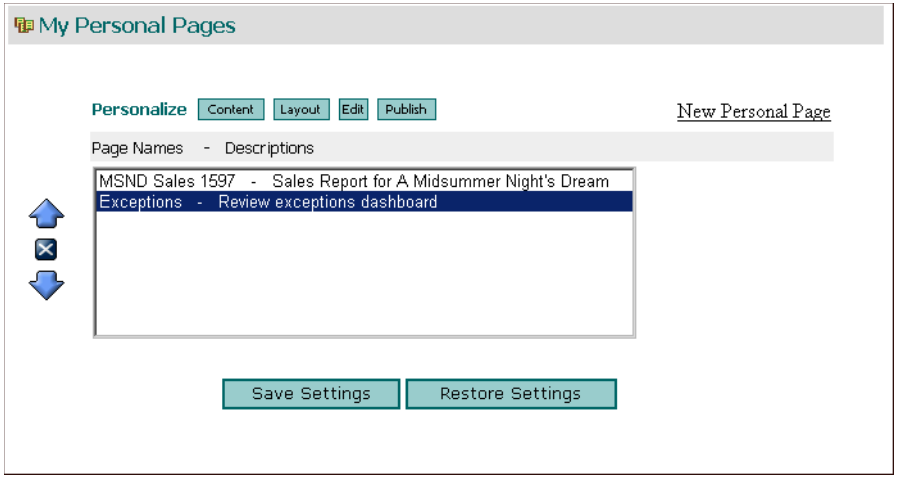
5. Choose **Save Settings**.

Adding a File Content Window on Additional Personal Pages

If you want to add the same file content window (display the same HTML document/output file) on an additional Personal Page:

1 **From the Personal tab, choose Manage Personal Pages in the Navigation pane.**

The My Personal Pages page appears in the Content pane.



2 **Select the Personal Page you want to add the file content window to and choose Content.**

The Content page appears.

3 **Choose the desired file content window and add it to the Content list for your Personal Page.**

4 **Choose Save Settings.**

Removing a File Content Window from All Personal Pages

If you want to remove a file content window from all Personal Pages you have included it on:

1 **Select Browse.**

2 **Navigate to the original HTML document/output file and choose its Subscribe button.**

3 **On the Subscribe page, disable Display file/output as a file content window.**

4 **Choose Save Settings.**

Embedding BQY Document Sections in Personal Pages

You can embed sections of BQY files or BQY job output into a Personal Page. If the document is the output of a job, it must be from a single-cycle BQY job. You see the most recent job output in the embedded section.

Embedded sections are fully interactive, with options available from the popup menu. You can choose whether to include the Intelligence iServer Main Menu bar or just the Navigation bar as part of the embedded section. BQY document sections that you can embed are:

- **Results** – Reduced vertically to fit in the container, with horizontal scroll bars. To view more vertical regions, use the page navigation options available on the Main Menu bar.
- **Tables** – Reduced vertically to fit in the container, with horizontal scroll bars. To view more vertical regions, use the page navigation options available on the Main Menu bar.
- **Pivot** – Reduced vertically to fit in the container, with horizontal scroll bars. To view more vertical regions, use the page navigation options available on the Main Menu bar.
- **Chart** – Scaled proportionally to fit in the container.
- **Reports** – Clipped to fit in the container.
- **Dashboard** – Clipped to fit in the container.

Embedding a BQY Section on a Personal Page

For you to embed a BQY section on a Personal Page the document must be Intelligence iServer enabled, and you must have the proper access privileges to view the document.

To embed a BQY section on a Personal Page:

1. Select **Browse**.

2. Navigate the folders till you find the document you want to add sections from to your Personal Page, then choose the document's **Subscribe** button.

3. On the Subscribe Settings page, select **Add sections of BQY Document**.

4. Select the section you want to add from the **Embed Section** drop-down list (limited to sections that are Intelligence iServer enabled).

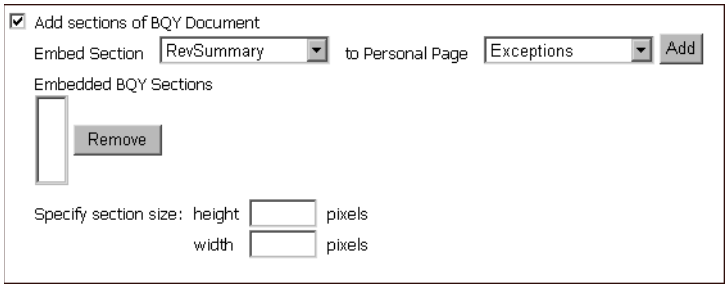
5. Select the Personal Pages you want to add the sections to from the **to Personal Page** drop-down list.

6. Choose **Add**.

   The section will appear in the **Embedded BQY Sections** drop-down list.

7. Specify the size you want each section to be on the Personal Page.

   Select the desired section from the **Embedded BQY Sections** drop-down list and specify its height and width in pixels in the respective field.



8. Choose **Save Settings**.

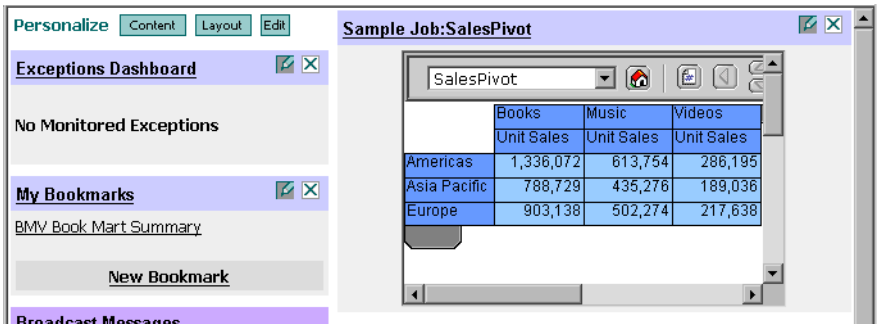
Editing an Embedded BQY Section on a Personal Page

After you embed a BQY section, you can edit its properties.

To edit the properties of an embedded section:

1 **Navigate to the Personal Page that displays the embedded section you want to edit and choose Edit.**

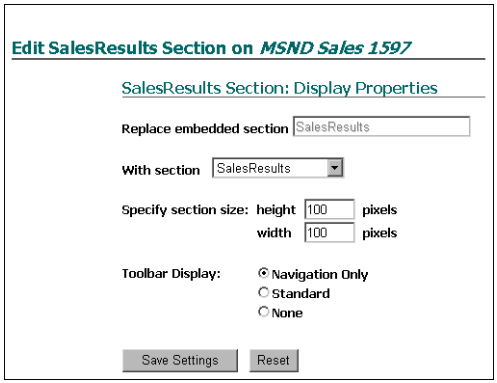
In this example, the Sample 1:Sales Pivot file content window is too large.



2 **Change the necessary fields.**

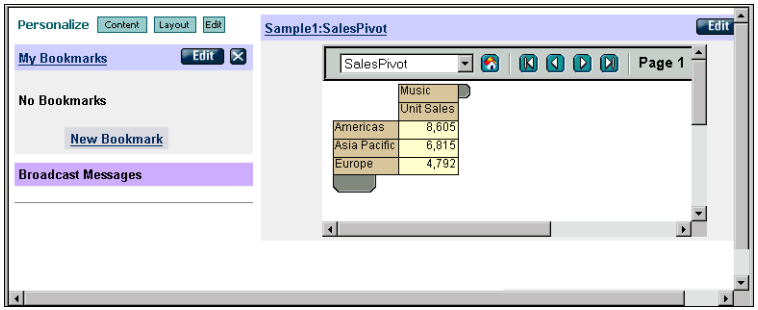
- **Replace embedded section** – (Read only) Displays the section currently embedded.
- **With section** – Select a section from the drop-down list to replace the currently embedded section. The name of currently embedded section appears by default.
- **Specify section size** – Enter the size of the section in pixels.
- **Toolbar display** – Select the Intelligence iServer toolbar to embed with the section (the default is no toolbar).
  - Select **Navigation Only**, to have the first page, previous page, next page, and last page toolbar buttons only.
  - Select **Standard**, to have all toolbar buttons, including access to the Intelligence iServer online help.

- Select **None**, to have no toolbar displayed.



3 Choose **Save Settings**.

The edited embedded section appears on your Personal Page.



Removing an Embedded BQY Section from a Personal Page

You can remove any embedded BQY section from your Personal Page.

To remove an embedded BQY section from a Personal Page:

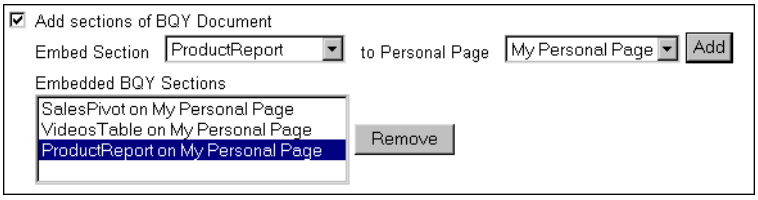
➤ **On your Personal Page, choose X in the title of the file content window containing the BQY section you want to remove.**

Or:

1 **Select Browse.**

2 **Navigate the folders till you find the document that contains the embedded sections you want to remove from your Personal Page, then choose the document's Subscribe button.**

3 **On the Subscribe Settings page, select the section you want to remove from the Embedded BQY Sections list box and choose Remove.**



4 **Choose Save Settings.**

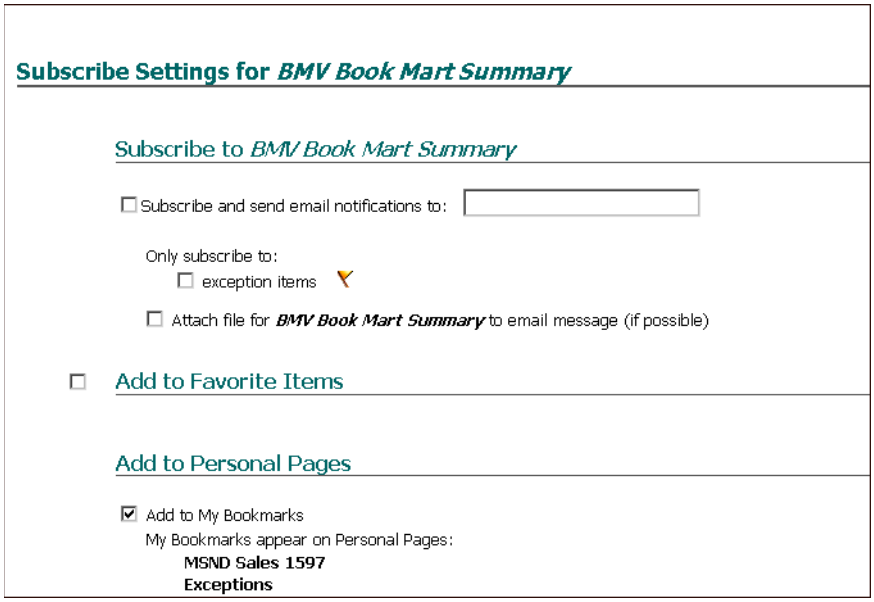
Creating Bookmarks

You can include bookmarks on a Personal Page. A bookmark is a text link or image link to a Hyperion Performance Suite item or to the URL for any intranet or Internet web page.

Adding a My Bookmark for a Hyperion Performance Suite Item

To add a My Bookmark for a Hyperion Performance Suite item:

1. **Select Browse and browse to the item you would like to bookmark.**
2. **Choose the item's Subscribe button.**
3. **On the Subscribe Settings page, under the heading Add to Personal Pages, select Add to My Bookmarks.**

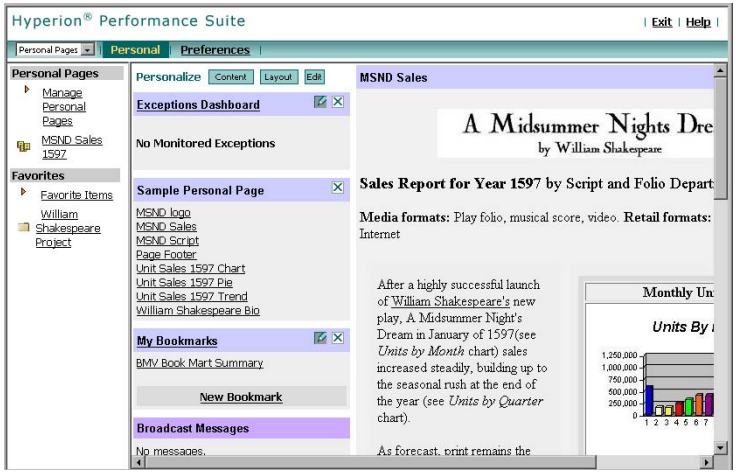


Note The new bookmark, as part of the My Bookmarks item, appears on every Personal Page that includes the My Bookmarks item.

4 Choose **Save Settings**.

5 Go to your Personal Page.

The Bookmark appears in the My Bookmarks list.



Adding an Image Bookmark for a Hyperion Performance Suite Item

To add an image bookmark for a Hyperion Performance Suite item:

1 **Select Browse and browse to the item you would like to bookmark.**

2 **Choose the item's Subscribe button.**

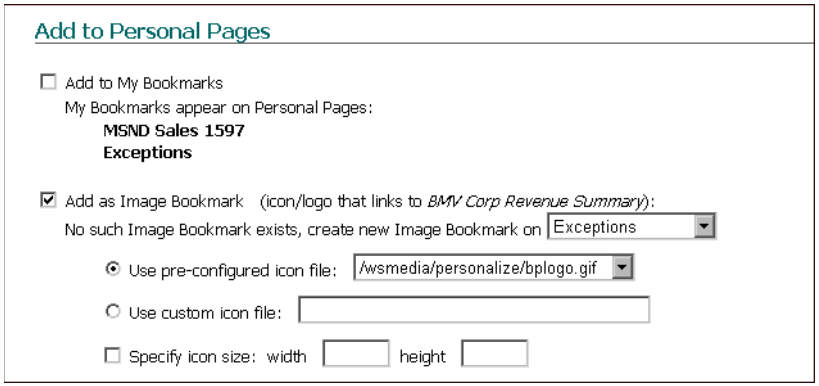
3 **On the Subscribe Settings page, under Add to Personal Pages, select Add As Image Bookmark. Specify the following information:**

- Which Personal Page to put the new image bookmark on
- The path to the graphics file you want to use. Choose either

a. A preconfigured Hyperion Performance Suite graphic from the drop-down list or

b. A custom graphic (your administrator needs to add your custom graphic to the Hyperion Performance Suite file system and give you the path to it). Using a graphic file from your local file system will not work.

- The desired dimensions for displaying the image (in pixels)



4 **Choose Save Settings.**

Adding an Image Bookmark for a Web Page (URL)

To add an image bookmark for a Web page:

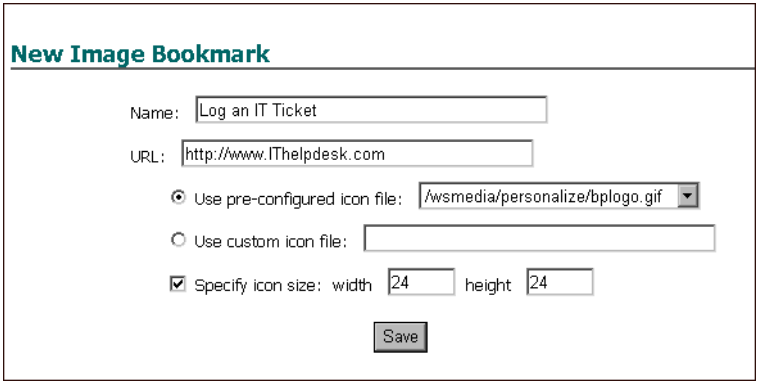
1 **Go to the Personal Page where you want the image bookmark to appear.**

2 **Choose Content.**

3 **On the Personal Page Content page, choose New Image Bookmark at the bottom of the page.**

4 **On the New Image Bookmark page, specify:**

- A name for the image bookmark
- The path of the graphics file you want to use (either a preconfigured Hyperion Performance Suite graphic or a custom graphic you requested your administrator to add to Hyperion Foundation)
- The desired dimensions for displaying the image (in pixels)



5 **Choose Save.**

Using the Exceptions Dashboard

Use the Exceptions Dashboard to monitor exceptions on your personal page. Exceptions notifications allow you to monitor certain conditions or situations and alert you when a certain threshold is crossed or event occurs in a report published to the Repository.

Usually, an exception is generated by an SQR or SQR iServer job that is specifically written to produce exceptions for Hyperion Performance Suite. You can subscribe to the job and choose to be notified when the exception occurs, either by email or in the Exceptions Dashboard (or both).

For each program you add to the Exceptions Dashboard, a green traffic light icon appears. When an exception occurs, the light changes to red. You can customize the Exceptions Dashboard by choosing its Edit button.

You have only one Exceptions Dashboard, even if you put it on multiple Personal Pages. If you modify the Exceptions Dashboard on one Personal Page, it changes on all of your Personal Pages that include it. Figure 4-4 shows the Exception Dashboard on a Personal Page.

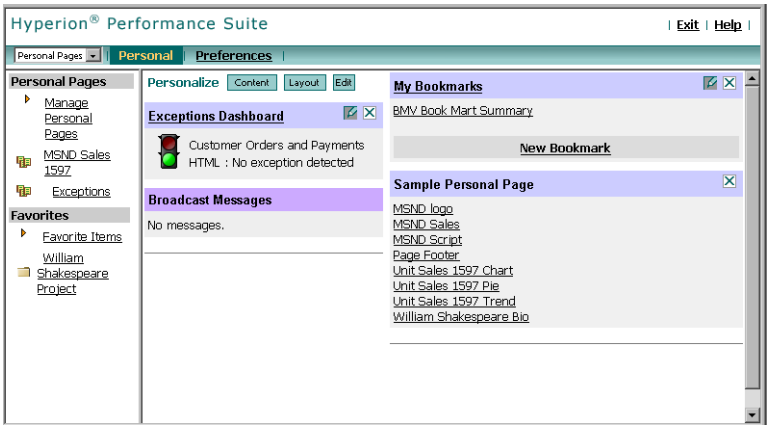


Figure 4-4 Exceptions Dashboard on a Personal Page

Adding the Exceptions Dashboard to a Personal Page

You can add the Exceptions Dashboard to all of your Personal Pages or to just one.

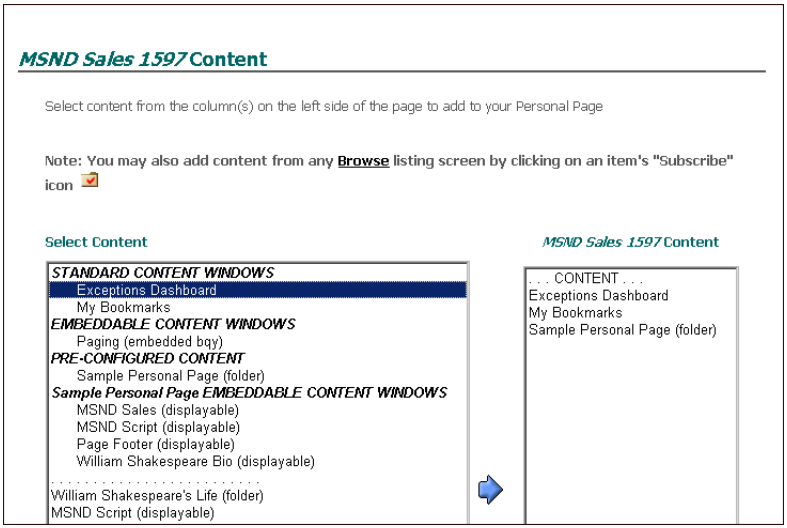
To add the Exceptions Dashboard to a Personal Page:

1. **Go to the Personal Page to which you want to add an Exceptions Dashboard.**

2. **Choose Content.**

3. **Choose Exceptions Dashboard and choose the right-facing arrow to add it to the Content list for your Personal Page.**

   Select the Exceptions Dashboard from the Select Content list box and choose the right-facing arrow.



4. **Choose Save Settings.**

Adding Monitored Exceptions

When you add a monitored exception, an icon is added to the Exceptions Dashboard that represents a job or file capable of generating an exception.

Note The owner of the file, or another user who has full control access privileges on it, must have enabled this file to be added to the exceptions dashboard for the following procedure to work.

To add a monitored exception:

1. Select **Browse**.

2. Navigate to the job whose exception you want to monitor and choose the job's **Subscribe** button.

3. On the Subscribe Settings page, choose **Add to Exceptions Dashboard** (in the Add to Personal Pages section of the page).

   If this option is not on the Subscribe Settings page, this file cannot be monitored for exceptions.

4. Choose **Save Settings**.

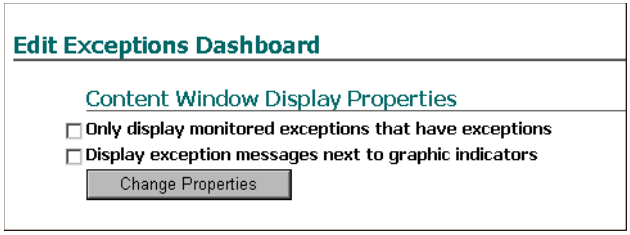
   Once you have added a monitored exception to your Exceptions Dashboard, you can include the Exceptions Dashboard as Personal Page content. See "Adding Personal Page Contents" on page 4-11 for more information.

Customizing the Exceptions Dashboard

You can customize the display of the Exceptions Dashboard.

To customize your Exceptions Dashboard:

1. On the Exceptions Dashboard heading, choose **Edit** or the name **Exceptions Dashboard**.
2. If you prefer not to show the green lights, but instead only have a red light appear when an exception occurs, enable the **Only display monitored exceptions that have exceptions** option.
3. If, when an exception occurs, you want to see its explanatory message next to its red light, enable the **Display exception messages next to graphic indicators** option.



4. Choose **Change Properties**.

Modifying the Layout of a Personal Page

Use the Layout button to choose a different layout style for a Personal Page or to rearrange content windows.

Choosing a Different Layout Style

The layout style of a Personal Page includes how many columns or sections the page has and where they appear on the page.

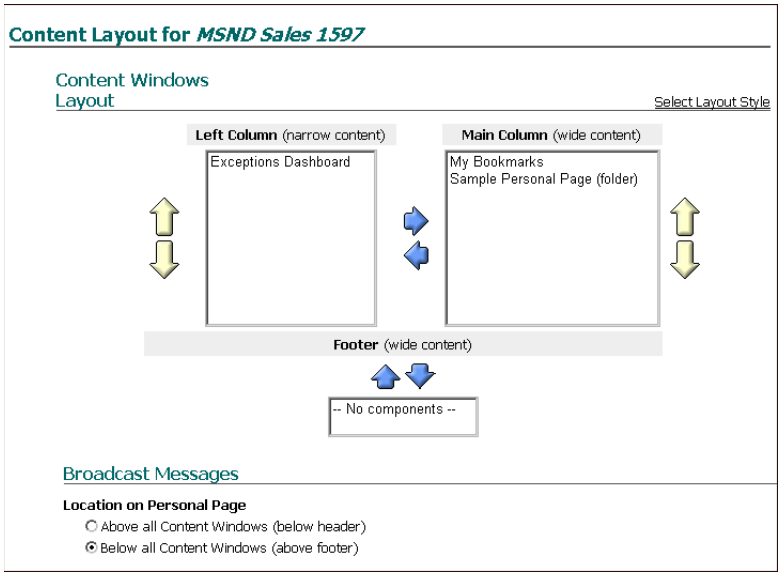
To choose a different layout style for a Personal Page:

1 **From the Personal tab, choose Personal Pages in the Navigation pane.**

The My Personal Pages page appears in the Content pane.

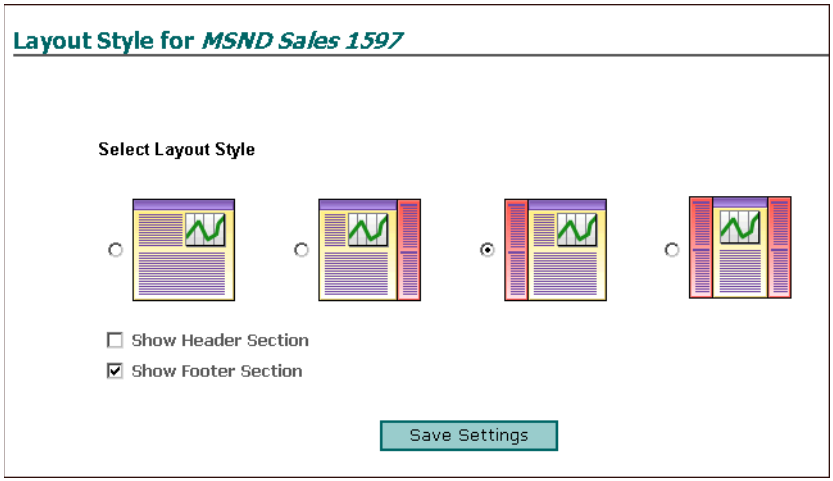
2 **Select the Personal Page you want and choose Layout from the Personalize bar.**

The Content Layout page appears.



3 Choose **Select Layout Style.**

4 Choose any of the layout styles shown.



5 If you want to put content windows in a section across the top or bottom of the Personal Page, choose **Show Header Section** or **Show Footer Section.**

6 Choose **Save Settings.**

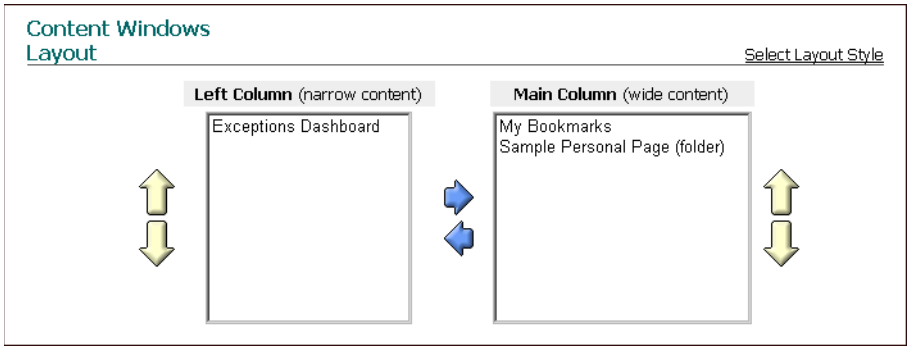
Rearranging Content Windows

To move content windows around on a Personal Page:

1 Choose **Layout** from the Personalize menu.

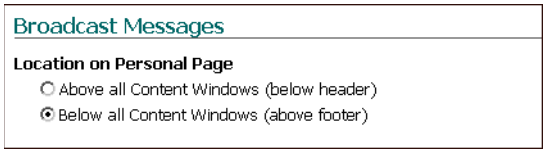
2 Select a content window you want to relocate.

3 If you want to move the selected content window up or down within the section (column, header or footer) it is currently in, choose one of the vertical arrows. If you want to move the selected content window to another section, choose one of the horizontal arrows.



4 Continue selecting and moving content windows until they are arranged as you want.

5 If you want to move the Broadcast Messages content windows, choose either **Above all Content Windows** or **Below all Content Windows** in the Broadcast Messages section of the Content Layout page.



6 Choose **Save Settings**.

Changing the Colors on a Personal Page

You can choose among predefined color schemes for your Personal Page, or individually set the color for any element of the page. Figure 4-5 shows some of the elements of a Personal Page whose colors can be modified.

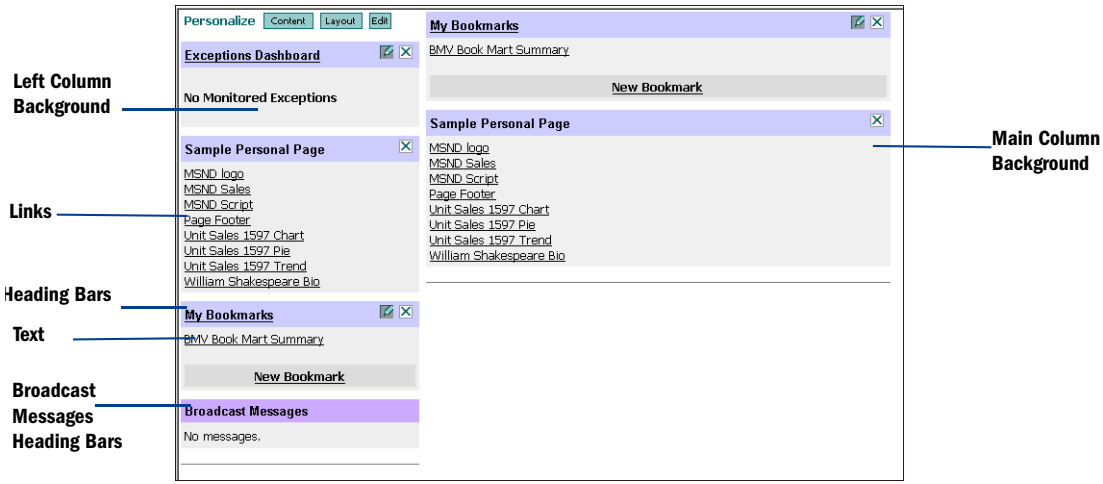


Figure 4-5 Personal Page Colorable Elements

To change the colors on a Personal Page:

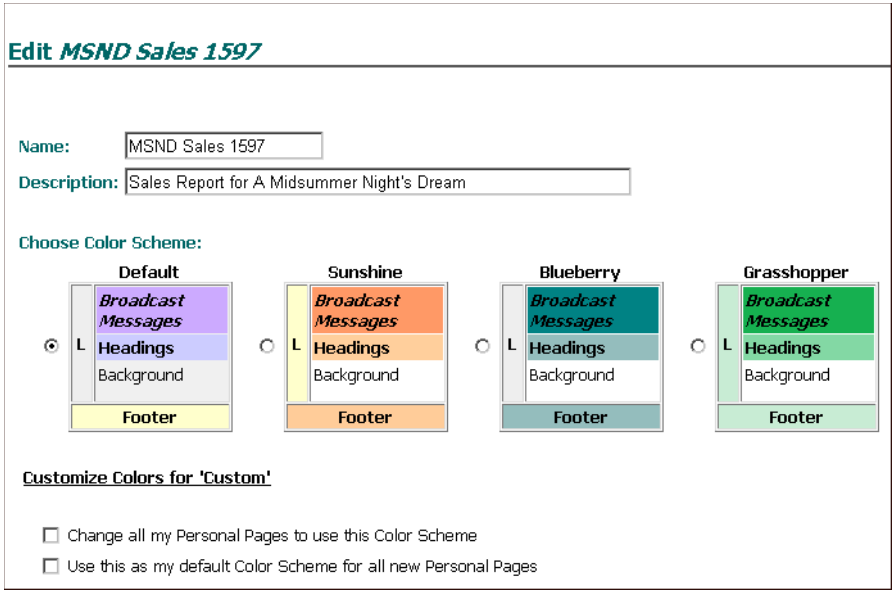
1. **Choose Personal Pages in the Navigation pane of the Personal tab.**

   The My Personal Pages page appears in the Content pane.

2. **Select the Personal Page you want and choose Edit from the Personalize bar.**

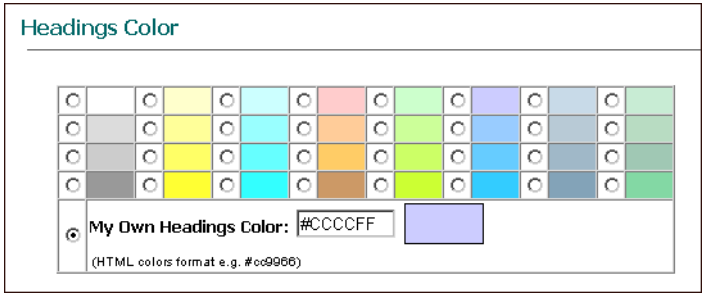
   The Edit page appears.

3 Choose one of the color schemes shown.



4 If you want to set colors individually, choose **Customize Colors for Custom**. If not, go to Step 7.

For each colorable Personal Page element, the Customize Color Scheme page displays an array of color samples above a My Own __ Color option. You can choose any color in the array by selecting its radio button. The color shown next to the My Own __ Color entry box is the element's current color. For example, in the picture below, My Own Headings Color is currently set to bright yellow, but the user is changing it to violet.



5 For each element of the page whose color you want to change, select the **new color** you want or enter a **hexadecimal color code** (for example, #000000 is the hexadecimal color code for black) in the My Own __ Color entry box.

6 Choose **Save Settings**.

7 Select either, both, or neither of the color scheme options:

- **Change all my Personal Pages to use this Color Scheme** – Applies the specified color scheme to all your existing Personal Pages
- **Use this as my default Color Scheme for all new Personal Pages**– Applies the specified color scheme to the current Personal Page and any future ones.

8 Choose **Save Settings**.

Working With Personal Pages

In addition to customizing your Personal Page, you can also create multiple Personal Pages for different purposes, specify a default Personal Page if you have more than one, and publish a Personal Page so that others can use it as their own. Review information on:

- Creating a Personal Page
- Copying a Published Personal Page
- Deleting a Personal Page
- Setting the Default Personal Page
- Publishing a Personal Page

Creating a Personal Page

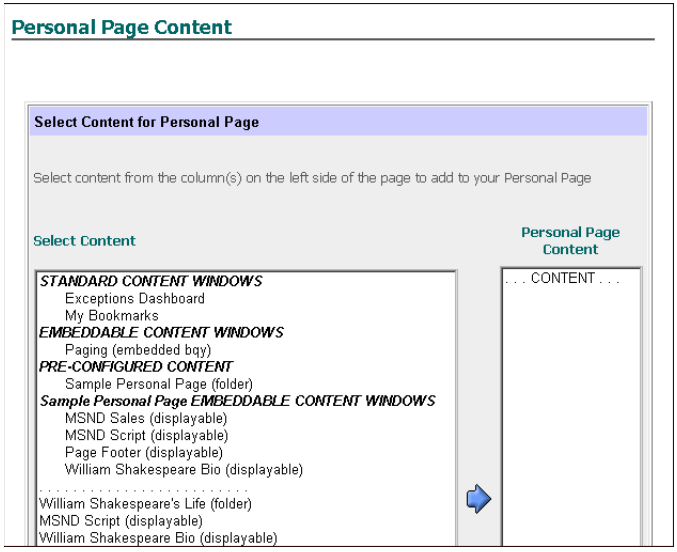
You can create multiple Personal Pages. To create a Personal Page:

1. Choose **Personal Pages** in the Navigation pane of the Personal tab.
2. On the My Personal Pages page, choose **New Personal Page**.

   The New Personal Pages link does not appear if you exceeded the number of Personal Pages allowed by your administrator. You must remove a Personal Page for the link to appear.

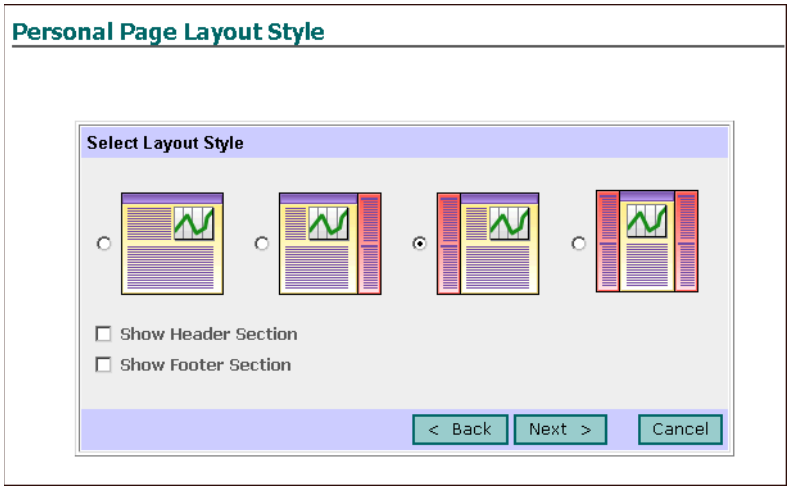
Note If you have access to any published Personal Page, you are given the choice to copy one or more of those to the Personal module. For more information, see "Publishing a Personal Page" on page 4-41. Continue with this set of instructions if you are creating a page from scratch.

3 On the Personal Pages Content page, use the shorter arrows to add the content windows you want (listed on the left side) to the Content list for your new Personal Page (on the right) and choose **Next**.



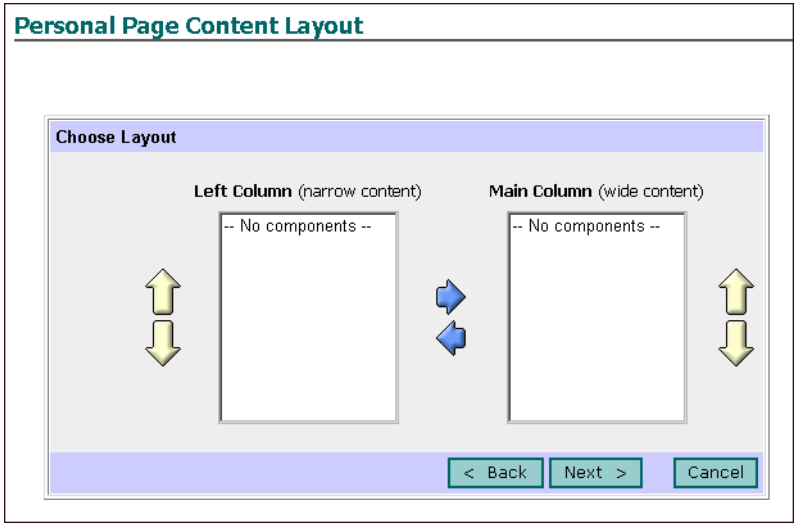
4 On the Personal Page Layout Style page, choose a layout style and choose **Next**.

The layout illustrations show only the Personal Page portion of the browser window; the Navigation pane also appears on the left side. A Header section is a wide area that can contain one or more content windows, located above the page's columns. A Footer section is the same, but located at the bottom of the page.



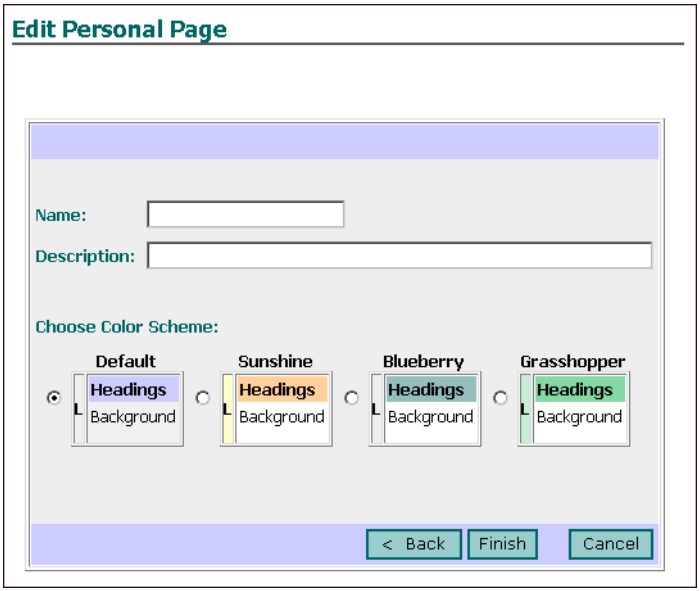
5 **On the Choose Layout page, arrange the various content windows where you want them on your Personal Page.**

Choose a content window and then a short arrow to move the content window between sections. Choose a content window and then a long arrow to change a content window's position in a section. When you are done, choose **Next**.



6 **On the Edit Personal Page page, enter a name and description for your new Personal Page, choose a color scheme, and then choose Finish when you are done.**

You can further customize the colors at a later time if you wish. On the My Personal Pages page, the new Personal Page is listed with your other ones.



7 **Choose your new Personal Page's name in the Navigation pane to view your new Personal Page.**

Copying a Published Personal Page

In addition to publishing new Personal Pages, you can also copy published Personal Pages.

To copy published Personal Pages:

1. **In the Personal Pages module, click the Personal Pages icon in the Navigation pane to display the My Personal Pages page.**
2. **Click the New Personal Page link to display the Add Personal Page page.**
3. **Select Copy Published Personal Page, and then choose Next.**

   The Add Existing Personal Pages page appears.
4. **Select the personal page(s) you want to copy from the list, and then choose Finish.**

   The page(s) now appear in the Personal Pages list in the Navigation pane.

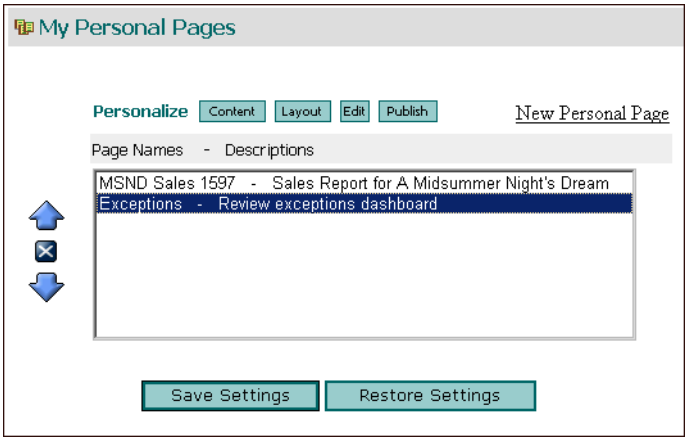
Deleting a Personal Page

To delete a Personal Page:

1 **Choose Personal Pages at the bottom of the Navigation pane of the Personal tab.**

The My Personal Pages page appears in the Content pane.

2 **Select the Personal Page you want to delete from the Page Names – Descriptions list.**



3 **Choose the X to the left of the list.**

The selected Personal page is removed from the list.

Note Choose Restore Settings to restore the deleted Personal Page to the list.

4 **Choose Save Settings.**

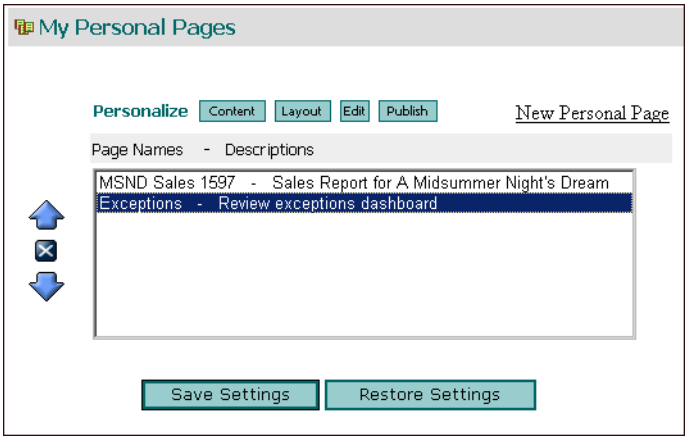
Setting the Default Personal Page

To set your default Personal Page:

1 **Choose Personal Pages in the Navigation pane of the Personal tab.**

The My Personal Pages page appears in the Content pane.

2 **On the My Personal Pages page, select the Personal Page you want to use as your default. Use the up arrow to move this page to the top of the list.**



3 **Choose Save Settings.**

Publishing a Personal Page

You may publish a new Personal Page or replace a published Personal Page using the content of your Personal Page. Publishing a Personal Page enables other users to copy it.

Note To publish Personal Pages, you need the proper access privileges to the Personal Page folder.

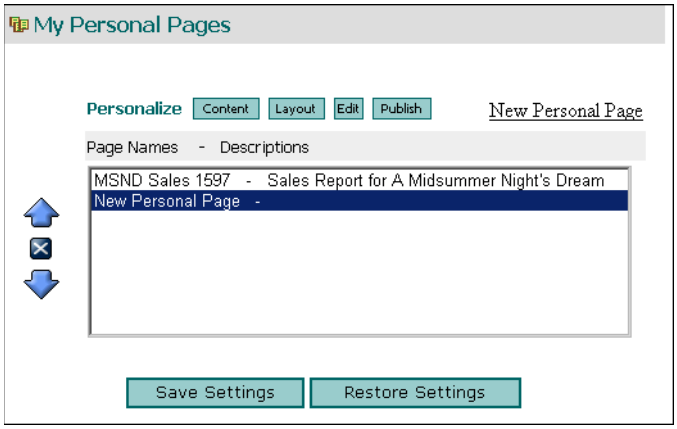
Tip If you frequently publish Personal Pages, you could add the Personal Pages folder to your Favorites folder.

To publish a Personal Page:

1. **Choose Personal Pages in the Navigation pane of the Personal tab.**

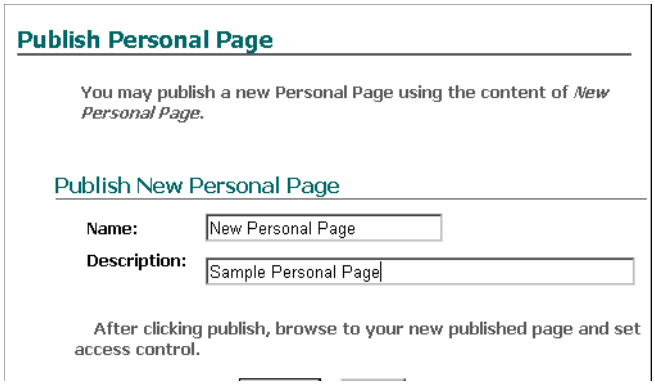
   The My Personal Pages page appears in the Content pane.

2. **On the My Personal Pages page, select the Personal Page you want to publish and choose Publish.**



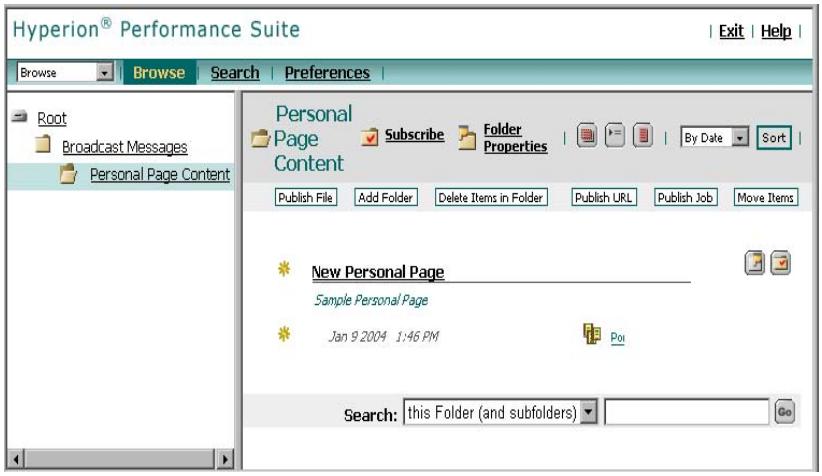
3. **Enter a name and a description in the Publish New Personal Page section and choose Publish.**

The name and description defaults to what you have already assigned to this Personal Page. You can change these now that you are publishing the page for other users. The name and description should communicate what is distinctive about this page.



4 To set access control on the Personal Page you just published, select **Browse** in the Module menu.

5 Browse to the Personal Page Content folder in the Broadcast Messages folder.



6 **Choose the Modify Properties button for the Personal Page on which you want to set the access control.**

See “Setting Access Privileges” on page 6-8 for instructions on how to set access privileges for your newly published Personal Page.

Default access privileges when publishing Personal Pages are the same as basic documents. See “Publishing Preferences” on page 3-9.

To replace a published Personal Page:

➤ **Follow the instructions for publishing a Personal Page, but replace Step 3 with this step: In the Replace Personal Page section, select the page to replace and then choose Replace.**

You can replace a published Personal Page with one that has a different name. The published page gets replaced, but the name remains the same.

Accessing Personal Page Preferences

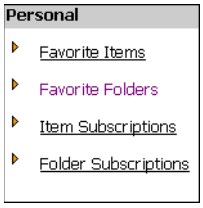
Personal Pages preferences gives you access to edit the subscribe settings of your personalized content. From the Preference tab of the Personal Pages module you can edit the subscribe settings for the following content:

- **Favorite Items** – Lists all items added to your Favorite Items list.
- **Favorite Folders** – Lists all folders added to your Favorite Folders list.
- **Item Subscriptions** – Lists all items in which you have subscribed to receive notifications.
- **Folder Subscriptions** – Lists all folders in which you have subscribed to receive notifications.

To modify the subscribe settings of your personalized content:

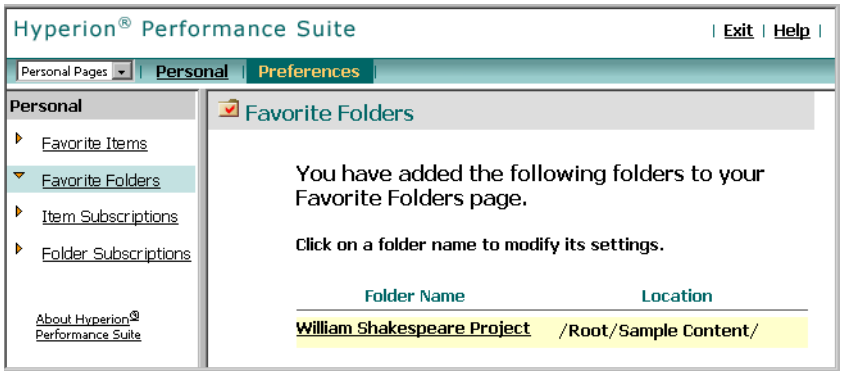
1 **Choose the Preferences tab in the Personal Page module.**

The navigation pane changes displaying the folder names of your personalized content.



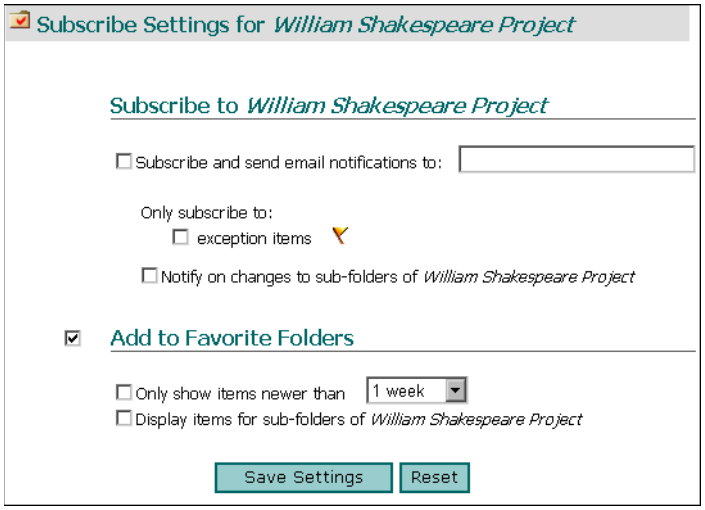
2 **In the Navigation pane, choose the folder name of the type of content in which you want to edit the subscribe settings.**

The name and location of the items or folders from the content list appears in the Content pane.



3 **Choose the name of any item to modify its subscribe settings.**

The subscribe page for the item appears.



4 **Modify the subscribe settings and choose Save Settings.**

Summary

In this chapter you have learned how to change your views of View Manager. In addition, you learned how to modify the content and layout of Personal Pages, create additional Personal Pages, copy published Personal Pages, and add your own content to Personal Pages. You have also seen how to embed Intelligence iServer sections to your Personal Pages.

5 Subscribing

Hyperion Foundation provides easy access to content that is important to you through subscriptions. By subscribing to an item or folder, you can get automatic notification of updates to content, save content for easy access as favorites, display links or content on your customized pages that you set up, or add an item to your Dashboard list.

In This Chapter

About Subscribe 5-2
Subscribing to Items 5-2
Subscribing to Folders 5-7
Viewing an Item When You Receive a Notification 5-10
Managing Your Subscriptions 5-10

About Subscribe

The subscribe feature gives you the ability to get a notification every time a particular item updates, a specific job runs, or anything in a folder changes. You can choose to receive an email that contains a notification message or an email that has the changed item attached. You can also use the subscribe feature to store items or folders to your Favorite Items or Favorite Folders, to add a bookmark to your Personal Page, or to add items to your View Manager module.

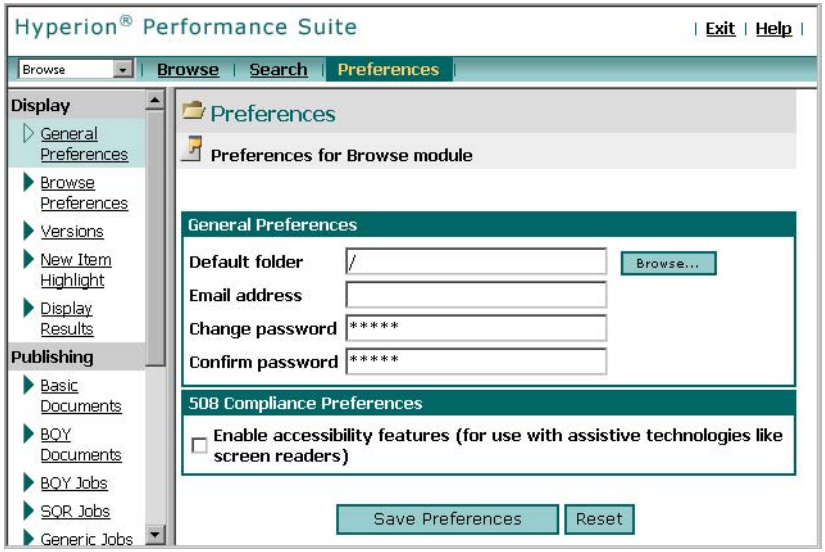
Subscribing to Items

Items are documents, jobs, URLs, and anything else contained in a Browse folder and listed on a Browse page. For more information on items, see "About Items and Folders" on page 2-2.

If you subscribe to a document, you are notified whenever a new version of a document is published or when a version of a document is updated. If you subscribe to a job, you are notified every time the job is run. You are notified of changes by email at the email address that you specify.

To set up a default email address:

1 **Navigate to the General Preferences page of the Preferences tab of the Browse module.**



2 **Enter your default email address and choose Save Preferences.**

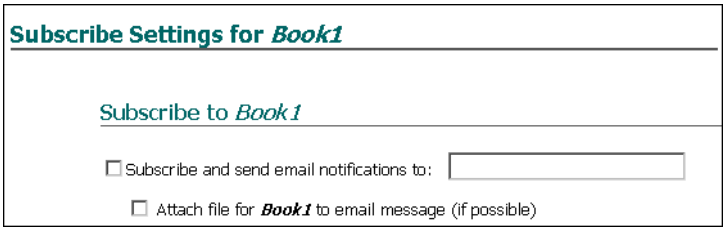
Subscribing to be Notified When an Item Changes

Subscribe to an item if you want to be notified whenever that item changes. You can choose to receive an email notification that the item changed or to receive an email notification with the changed item attached.

To subscribe to be notified when an item changes:

1. **In the Browse module, navigate to the item you want to subscribe to and choose the Subscribe button.**
2. **On the Subscribe Settings page, select Subscribe and send email notifications to or Attach file for (item name) to email message (if possible).**

   Your administrator determines the maximum size of attachments.



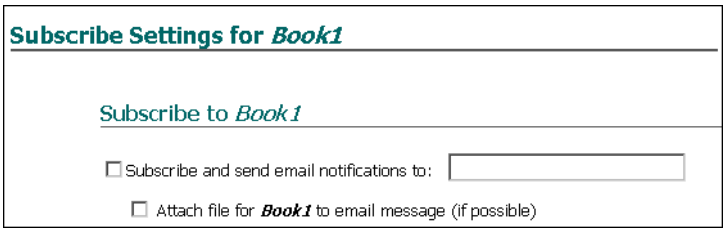
3. **Choose Save Settings.**

Removing a Subscription

When you no longer need to know that an item is updated, remove your subscription for the item.

To remove a subscription:

1. **Navigate to the item you want to stop subscribing to and choose the Subscribe button.**
2. **On the Subscribe Settings page, clear the subscribe option.**



3. **Choose Save Settings.**

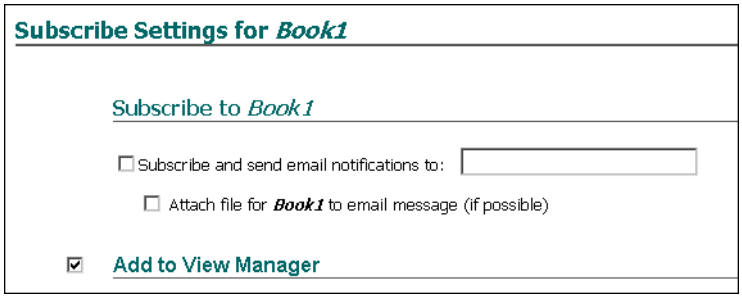
Adding an Item to the View Manager Module

Items that you want to manage through the View Manager module can be added to the View Manager module with the subscribe button. Items subscribed to View Manager appear in the View Manager Manage tab and in the View drop-down list. Refer to "Using the View Manager Module" on page 4-2 for more details.

Note This option is not available for multiple-cycle BQY jobs.

To add an item to the View Manager module:

1. **In the Browse module, navigate to the item you want to add to the View Manager list.**
2. **Choose the Subscribe button.**
3. **On the Subscribe Settings page, select Add to View Manager.**



4. **Choose Save Settings.**
5. **To see your Dashboard list, select View Manager from the module list.**

Adding an Item to Your Favorites

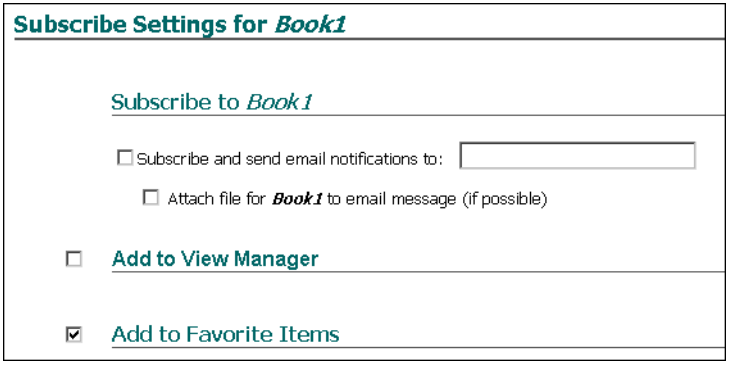
Items that you frequently access can be added to your Favorite Items list.

To add an item to your Favorite Items list:

1. In the Browse module, navigate to the item you want to add to your Favorite Item list.

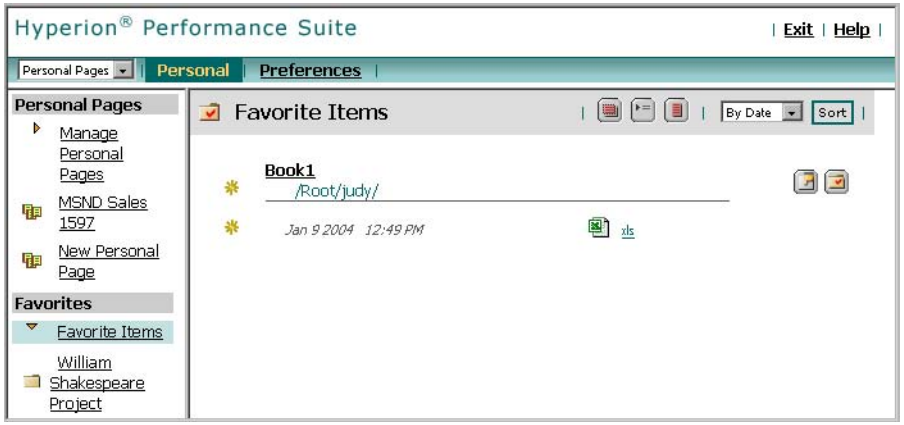
2. Choose the **Subscribe** button.

3. On the Subscribe Settings page, select **Add to Favorite Items**.



4. Choose **Save Settings**.

5. To see the Favorite Items list, go to the Personal Pages module and choose **Favorite Items**.



Subscribing to Exceptions

Reports and files can be set up to report special occurrences. These special occurrences are flagged in the program to be reported as exceptions. You can get automatic notification only when an exception occurs as opposed to receiving notification when the file is updated.

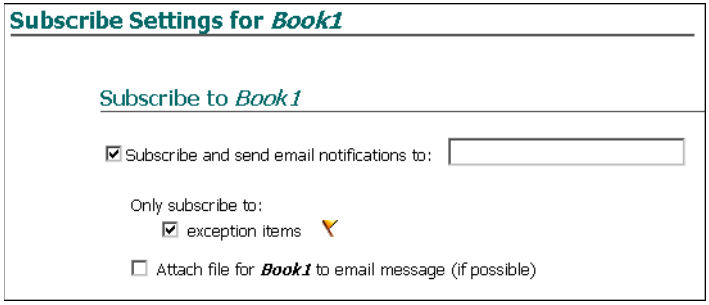
Note The owner of the file or job, or another user who has full control access privileges on it, must have enabled the file or job to report exceptions for the following procedure to work.

To subscribe to exceptions:

1. **In the Browse module, navigate to the item to which you want to subscribe and choose the Subscribe button.**

2. **On the Subscribe Settings page, select exception items.**

   If this option is not on the Subscribe Settings page, this file or job does not use exceptions.



3. **Choose Save Settings.**

Note You can also add exceptions to your Exceptions Dashboard on your Personal Page. See "Adding Monitored Exceptions" on page 4-26.

Subscribing to Folders

When you subscribe to a folder, you are notified of any new items published in that folder or any updates to items within the folder. You can also receive notification if there are any changes to the subfolders of the subscribed folder.

You are notified of changes by email at the email address that you specify. To set up a default email address, go to the General Preferences page on the Preferences tab of the Browse module. For more information, see "To set up a default email address:" on page 5-2.

Subscribing to be Notified When a Folder Changes

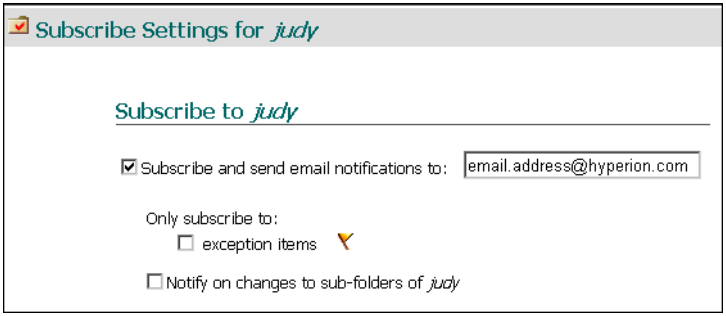
If you are interested in the entire contents of a folder or subfolder, you can subscribe to the folder or subfolder. You will receive an email notification when any item in the folder changes or if any new items are added to the folder.

To subscribe to receive notification for changes to folders or subfolders:

1. **In the Browse module, navigate to the folder to which you want to subscribe.**
2. **Choose Subscribe next to the Subscribe icon in the row with the folder name.**

3. **On the Subscribe Settings page select Subscribe and send email notification to: to receive notification for this folder and to change or enter your email address.**

   The email address that appears here may be your default email set by your administrator, or the default email address you set in General Preferences in the Browse module. You can change your email address just for this subscription by entering a new email address here.



4 If you want to receive notification when there are changes to the subfolders, select **Notify on changes to subfolders of *subfolder***.

5 If you want to receive notification only when there are exceptions, select **exception items**.

6 If you want to receive notification only when there are high priority items, select **high priority items**.

This option is only available if the administrator has enabled priority ratings.

7 Choose **Save Settings**.

Removing a Subscription

When you no longer need to know about content changes in a folder, you can remove your subscription to the folder.

To remove a subscription:

1 Navigate to the folder you want to stop subscribing to and choose **Subscribe** next to the Subscribe icon.

2 On the Subscribe Settings page, clear the subscribe option.

Adding a Folder to Favorite Folder List

Folders that you frequently access can be added to your Favorite Folders list.

To add a folder to Favorite Folder list:

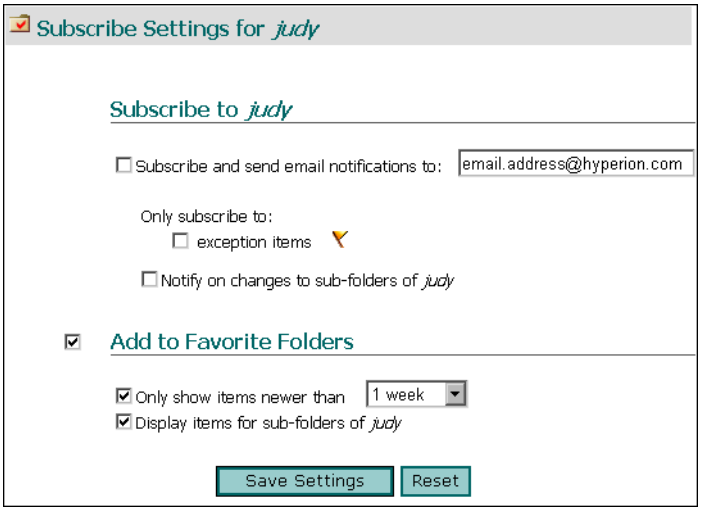
1 In the Browse module, navigate to the folder you want to add to your Favorite Folder list.

2 Choose **Subscribe** next to the subscribe icon.

3 On the Subscribe Settings page, select **Add to Favorite Folders**.

The **Only show items newer than** option can be used to display only new items in your Favorite Folder list.

The **Display items for subfolders of** option displays the folder and the subfolder items as one merged folder.



4 Choose **Save Settings**.

5 To see your Favorite Folders lists, go to the Personal Pages module and choose the folder name under the Favorite Folders heading.

Viewing an Item When You Receive a Notification

With an email notification you can access an item directly without browsing the Repository.

Email notification comes in one of two formats:

- **Email with a link to the item or folder** – Choose the link; if you have access to that item, you can open the document.
- **Email with the item attached** – Follow the directions to either view the file where it is or download the attachment to a file.

Managing Your Subscriptions

You manage your subscriptions from the Personal Pages Preference tab. Choose either Item Subscriptions or Folder Subscriptions to view your list of item or folder subscriptions. You can choose individual subscriptions from either list to modify or delete a subscription. For more information, see "Accessing Personal Page Preferences" on page 4-44.

Viewing a List of Your Subscriptions

To view a list of your subscriptions:

1. **Navigate to the Personal Pages module, and choose the Preference tab.**
2. **Choose either Item Subscriptions or Folder Subscriptions.**

3. **Choose any subscription from the list and modify or delete the subscription.**

Summary

In this chapter you have learned how to set up subscriptions and favorites. Subscribing allows you to automatically receive copies or email notifications of updated documents.

6 General Publishing

In order to publish content, you must have the proper accesses privilege. You can publish jobs if your Browse page shows the Publish File or Publish Job links in the action menu. With the proper access, you can publish content, which includes files, jobs, and URLs, to the Hyperion Foundation Repository, and you can modify or delete specific items.

For information about publishing Personal Pages, see Chapter 4, "Using View Manager and Personal Pages."

In This Chapter

About Publishing 6-2

Publishing Content. 6-4

Setting Access Privileges 6-8

Working with Properties and Options 6-14

Working with Versions 6-22

About Publishing

When you publish to the Repository, you identify the file or job that you are publishing by entering the path (where it is currently stored), name, and a short description. These identifying pieces of information are called properties. For example, the path to a file might be `c:\test.doc`; its name might be `test.doc`. Some properties, such as file size and MIME type (file extension) are "read" by the system when it adds the item to the Repository, and you do not have to manually enter them.

You publish content to the Hyperion Foundation Repository to make it available to others. You may give users different access privileges on the items you publish. For example, you might give some users the ability to modify the content, while limiting others to viewing (or reading) it. Refer to "Setting Access Privileges" on page 6-8 for detailed information on access privileges.

Note If you try to publish an item whose MIME type is not currently defined, you get an error message indicating that the extension is unknown. Contact your administrator to create the MIME type.

Review the following sections for extra information about publishing:

- BQY Documents: Whether to Publish as Files or Jobs
- HTML Files

Refer to "Publishing Content" on page 6-4 for general instructions on publishing items to the Repository.

BQY Documents: Whether to Publish as Files or Jobs

You can publish a BQY files or jobs document either as a file or as a job, depending on how you intend it to be used. Publish a BQY document as a file to make it available for interactive analysis on user's desktops. Publish a BQY document as a job for scheduled or on-demand execution and distribution of output.

Note If the BQY document you are publishing uses row-level security, the row-level security feature is applied when queries in the job or file are processed. When publishing BQY documents that already contain data, make certain that the data in the BQY document is appropriate for the audience. For example, publish BQY documents containing only generalized summary data, such as "total sales for the company." When the users process queries to get more detailed information, their row level security restrictions would be applied at the more detailed levels, such as sales data for only their region or department.

Table 6-1 enumerates the uses of a BQY document when published as a file or as a job.

Table 6-1 Two Ways of Publishing a BQY Document

What a user can do with a BQY document published as a...	File	Job
Use it interactively with web client	✓	
Use it interactively with the Intelligence iServer	✓	
Schedule automatic execution		✓
Distribute output via email		✓
Produce multiple-cycle output		✓
Distribute output to network directories		✓
Publish current results for further analysis with either the web client or the Intelligence iServer		✓
FTP output		✓
Print output		✓

HTML Files

In HTML files, the links to images and to other HTML files are dependent on their locations in the directory structure. To assure that the links remain functional after you publish them:

- Use relative links in the HTML
- Create folders and subfolders that mirror the directory structure

For example, suppose the files are in this directory structure:

```
Company Handbook
   index.html
   Supporting Files
      benefits.html
      confidentiality.html
      ...
   Images
      co_logo.gif
      hq_daycare.gif
      ...
```

where `index.html` links to files in the subdirectories `\Supporting Files` and `\Images`. After publishing `index.html` (in a folder of any name), you need to create subfolders named `\Supporting Files` and `\Images`, and publish the files from the corresponding subdirectories into those subfolders.

Publishing Content

You publish all content, including files, jobs, and URLs, through the Browse module. This section offers generic instructions for the following tasks:

- Publishing Single Files
- Publishing Multiple Files
- Modifying a Published Item

Publishing Single Files

To publish a file, job, or URL:

1 **In the Browse module, navigate to the folder in which you want the item to reside.**

2 **In the action menu, choose Publish File, Publish Job, or Publish URL.**

3 **Fill in the properties in the form that appears.**

Required properties are marked with a red asterisk. If a value exists, you can keep the value or change it.

To specify access privileges to the item, see "Setting Access Privileges" on page 6-8.

For general properties that appear on the screen after you choose a publish command, see Table 6-3 on page 6-15. Item type specific properties are described after the common properties in this chapter.

For specific job properties, see "Properties of BQY Jobs" on page 8-4, "SQR Job Properties" on page 9-2, or "Generic Job Properties" on page 9-26.

Note Some properties are read and displayed by the system and are visible after publishing, when you want to view or modify the properties.

4 **Choose Next to continue, or Finish to publish the item.**

If you need to return to a previous page of the publishing process, choose the Back button at the bottom of the page. Do not use your browser's Back button.

Note When you publish an item, the system checks the file extension and assigns a MIME type accordingly. If multiple MIME types are associated with the file extension, you need to select a MIME type from the drop-down list. If the system does not recognize the file extension, publishing fails. Notify your administrator if you have a need for a new MIME type.

Publishing Multiple Files

You can publish more than one file at a time. These files must be published to the current folder.

You can simultaneously publish files that have different file extensions. For example, you could publish a text file with an HTML file and some image files.

Multiple file publishing does not work for BQY, OCE, or SQR files.

To publish multiple files at the same time:

1 **In the Browse module, navigate to the folder in which you want the files to reside.**

2 **In the action menu, choose Publish File.**

3 **Choose Multiple Files.**

4 **Make a list of the files you want to publish.**

Browse for the first file. Choose **>>** (right-facing arrows) to add the file to the list box. Continue Browsing and adding files to the list box until you have all the files you want to publish. To delete files from the list, select the file and choose **<<** (left-facing arrows).

5 **Fill in or change properties as desired.**

6 **Choose Next.**

If you subsequently need to backtrack, choose the Back button at the bottom of the page. Do *not* use your browser's Back button.

For information about specific properties, choose Help or read the appropriate section in this chapter, which covers all properties for items you can publish using the multiple file button.

7 **Choose Finish to publish the item.**

The items are published in the current folder.

Modifying a Published Item

In Hyperion Foundation, modifying an item means modifying its *properties*. Modifying an item's content is not a function of the Hyperion Foundation system. You cannot modify and save the content of an item as you would a file that you open from your desktop. The only way to overwrite content in the Repository is by using Browse to publish a replacement version. Modifying an item's *content* is done outside of the Hyperion Foundation system.

For instructions on modifying the properties of an item, see "Viewing or Modifying Properties of an Item" on page 2-12.

To modify the content of a published item:

1. **Modify the item's content outside of Hyperion Foundation.**

   With the appropriate application for the file type, edit a local or network copy of the file.

2. **Save your changes.**

3. **Publish the modified file as a new version by using the Add Version feature of Browse.**

   For instructions on adding versions, see "Adding a Version" on page 6-23.

Note When you open an item from Browse, and then modify it, you are using an application program to do the editing—even if the item content is displayed inside the browser. (In this case, the application is running inside the browser.) You can use the application's Save As command, but this saves a copy of the file to your file system, not to the Repository.

Setting Access Privileges

The level of access—view, modify, run, full control—that you grant to others on an item you publish is called access privilege. When you publish an item, you decide who gets access to it and at what level. You have full access control over the items you publish, and you can always change the access privilege level for all roles, groups, and users.

If your administrator has not specified which way you should grant access privileges, then you can choose to do so through roles, groups, or to individual users. Remember, however, that if there are many individual users to whom you wish to grant the same access privileges, it is more efficient to grant the privileges through roles or groups than to individual users.

Note If you want the access privileges to apply to other content that you publish, make them your default privileges by checking the box beside the text that says *Make these the default access privileges for all files I publish*. For more information about setting default access privileges, see "Publishing Preferences" on page 3-9.

The following procedure shows you how to set or modify access privileges:

- Setting or Modifying Access Privileges on Items
- Setting Access Privileges on BQY Documents
- Pushing Items

Setting or Modifying Access Privileges on Items

You have the option of setting access privileges as you publish items or modifying access privileges of already published items. When modifying the access privileges of a previously published item, navigate to the desired item in the Browse web module and choose **Modify Properties** for that item.

If you have the View Manager Content Pusher role, you have the ability to push all types of items, except multiple-cycle jobs and folders, to others when setting or modifying access control.

To set or modify access privileges:

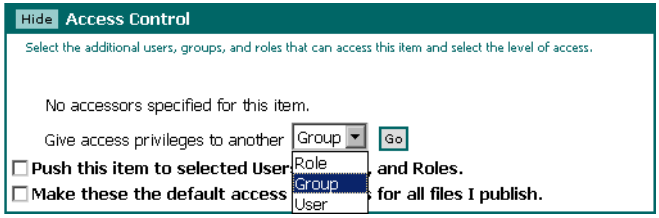
1 **In the Browse module, navigate to the file whose access privileges you want to modify.**

2 **Choose Modify Properties for the item.**

The Modify page appears.

3 **Choose Show on the Access Control section to display current access privileges.**

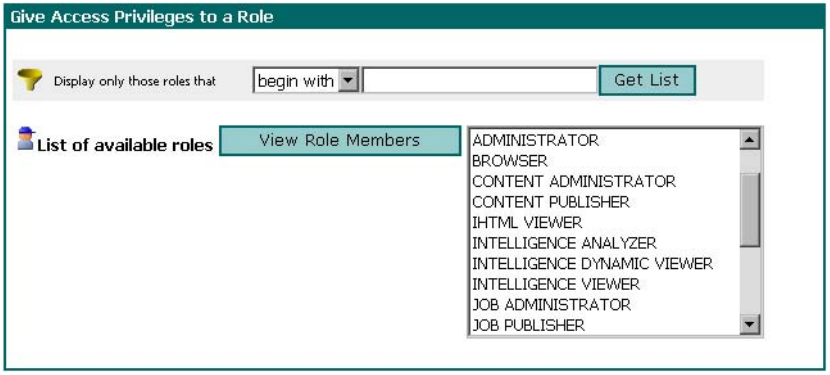
4 **Select Role, Group, or User from the *Give Access Privileges to another* drop-down list and choose Go.**



The Give Access Privileges to a Role/Group/User page appears.

5 **Filter the role, group, or user list by selecting begin with, contain, or are in group from the *Display only those roles/groups/users that* drop-down list, enter the letters or group name, and choose Get List.**

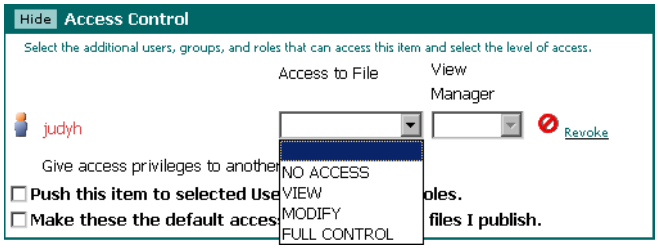
The **are in group** option is not an available filter for the role list.



6 **From the list that appears, select the role, group, or user to which you want to give access privileges and choose Select.**

The Access Control Section appears with the new user, group, or role available for further modification.

7 **Select the access privilege from the drop-down list next to the new user, group, or role.**



- **No access** – Cannot access the document in any manner
- **View** – Can only display the document
- **Modify** – Can make changes, but not delete
- **Modify and Run** – Can make changes and run jobs, but not delete
- **Full control** – Can display, change, and delete

For additional access privileges for BQY documents, see "Setting Access Privileges on BQY Documents" on page 6-12.

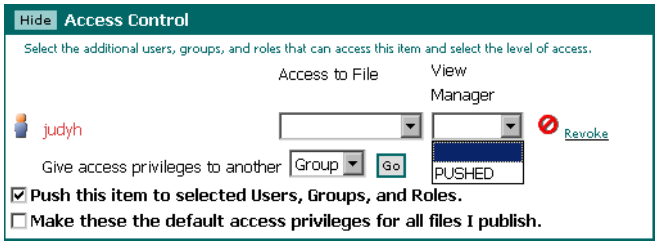
8 **Repeat Step 4 through Step 7 to set additional access privileges for other users, groups, or roles.**

Note If all of the users/groups/roles in which you have access to are not listed, filter the list with different criteria or contact your administrator. Your administrator determines the maximum number of users/groups/roles to list.

9 **If you have the View Manager Content Pusher role, you have the option to push this item to selected users/groups/roles. If you do not wish to push this item, skip to Step 10.**

a. Select the *Push this item to selected Users, Groups, and Roles* check box.

This check box enables the Push Document drop-down list for each user, group, and role listed in the Access Control section.



b. Select **PUSHED** from the **Push Document** drop-down list next to the users, groups, and roles to which you want to push the item.

Pushed items appear in Dashboards.

10 **If preferred, select *Make these selected access privileges my defaults for all files I publish*.**

Enable to automatically set the same access privileges for all files you publish after this file. You can change the access privileges for each file or re-set your default access privileges at any time.

11 **Choose OK or Apply.**

Note To remove a role, group, or user from the access list, choose **Revoke** next to the role, group, or user to be removed. You can remove a role, group, or user from the access list when publishing or modifying the properties of an item.

Setting Access Privileges on BQY Documents

For BQY files, you selectively grant not only access privileges, but also adaptive states as shown in Figure 6-1.

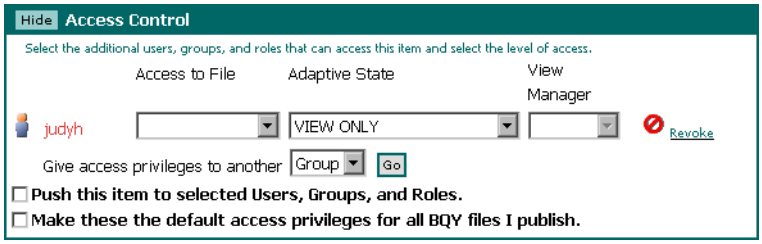


Figure 6-1 Access Control for a BQY Document

For BQY jobs, you set access privileges for the job output by granting specific access to users or groups or by enabling the *Only user who ran the job has access to the job output* option as shown in Figure 6-2.

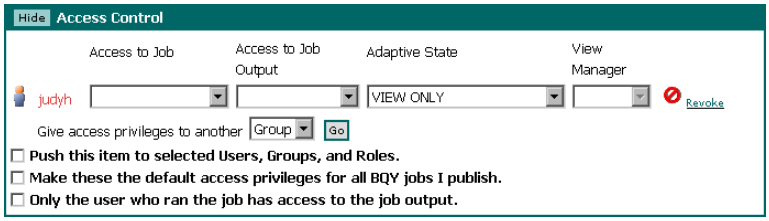


Figure 6-2 Access Control for a BQY Job

Note When publishing a BQY job, you need to assign yourself an adaptive state on the job output to access it.

Adaptive states are described in Table 6-2.

Table 6-2 Adaptive States

Adaptive State Icon	Adaptive State	Means that User:
	View Only	Can view the document, but may not modify it.
	View and Process	Can view the document and refresh the data, but may not otherwise modify the document.
	Analyze	Can create and modify charts, pivots, and reports in the document, but may not modify the queries or refresh the data.
	Analyze and Process	Can create and modify charts, pivots and reports in the document and may refresh the data. However, the user may not modify the query.
	Query and Analyze	Can create and modify charts, pivots and reports in the document and may refresh the data. Can build and limit queries before processing.
	Datamodel and Analyze	Can create and modify charts, pivots and reports in the document and may refresh the data. Can build and limit queries before processing. Can create and modify data models.

Pushing Items

If you have the View Manager Content Pusher role, you can push items over which you have full access control. You can push an item to users, groups, or roles while publishing the item, or you can push an item that has already been published. These pushed items appear on the dashboard of the specified user, group member, or role holder and cannot be removed except by the person who pushed them. For instructions on pushing items, refer to "Setting or Modifying Access Privileges on Items" on page 6-8.

Working with Properties and Options

This section discusses properties and options of Repository items, starting with those that are common to most and then proceeding to those specific to particular types of items. You specify properties and options when you publish content and also when you modify content. Refer to "Publishing Content" on page 6-4 to learn how to access properties pages while publishing content, and refer to "Viewing or Modifying Properties of an Item" on page 2-12 to learn how to access properties pages of published content.

BQY-specific job properties are in Chapter 8, "BQY Jobs." SQR-specific and generic job-specific properties are in Chapter 9, "SQR and Generic Jobs."

Review this section for:

- Common Properties
- Options of OCE Files
- Properties of BQY Files
- Properties of HTML Files
- Properties of URLs

Common Properties

This section describes General and Advanced properties that are common among all items. You specify some of these properties when you publish an item. Others are read by the system as it processes the item you are publishing. All properties appear when you view the properties of a published item.

Common General Properties

Most items have all of the common general properties shown in Figure 6-3 and described in Table 6-3.

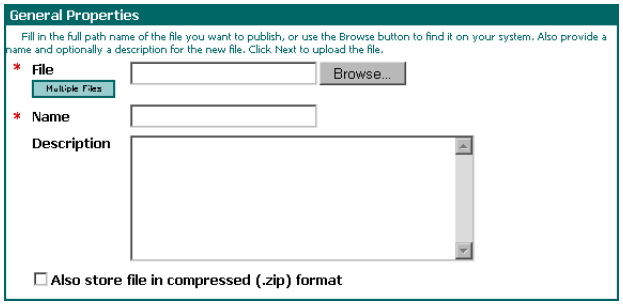


Figure 6-3 Common General Properties

Table 6-3 Common General Properties

File	Enter the path and file name or browse to the file you want to publish. The file or path name is limited to 250 characters.
Name	The Name can contain letters, numbers, the space character, and the underscore character (_). The Name by default is set to the file name without the extension, but you can change it to something more meaningful or readable. For example, you could change the name *Jan03SR* to *January 2003 Sales Report.*
Description	A meaningful description of the item. For example, *January 2003 sales figures for all regions plus a composite chart*. The length is limited to 254 characters. The description is used to generate keywords for keyword searching.
Also store file in compressed (.zip) format	If this property is enabled, a ZIP file is created and published with the original file. (This is not an option for BQY files and jobs, SQR jobs, generic jobs, and OCE files.) **Note:** If you enable *Also store file in compressed (.zip) format* when publishing an HTML file, users will not be able to display the HTML files as a File Content Window on a Personal Page.
Publish as Generic Job	This property exists for BQY and SQR jobs only. Enable if you want to publish your BQY or SQR job as a generic job.
Owner	(Read-only) After publishing, this property is automatically set to the person who published the job.
Size	(Read-only) After publishing, this property is automatically set to show the file size.
SmartCut	(Read-only) After publishing, this property is automatically set to show the SmartCut for the item. A SmartCut is a URL you can copy and send to other users so they can go directly to the item.

Common Advanced Options

Many, but not all items, have the advanced options shown in Figure 6-4 and described in Table 6-4.

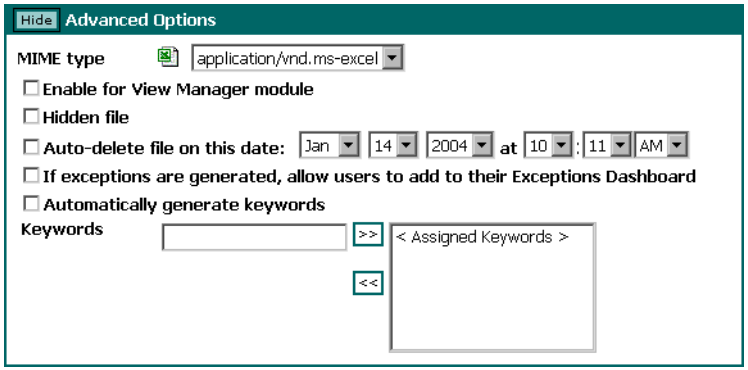


Figure 6-4 Common Advanced Options

Table 6-4 Common Advanced Options

MIME Type	(Read Only) The file type of the file you are publishing. MIME stands for Multipurpose Internet Mail Extension. Some examples of MIME types are: MS Word file, HTML file, and Personal Page. This field is only changeable for generic jobs.
Character Encoding	(For HTML files only) The character-encoding method used by the file, such as UTF-8. This encoding must be specified so that Hyperion Foundation can display the file correctly. If the character encoding is not specified in this property setting, nor in the code of an HTML file, Hyperion Foundation uses the character encoding set by your administrator.
Hidden Item	Indicates whether users can see the item in Browse. Enable this option if you do not want users to see the item. You may want to enable this option, for example, for image files needed by an HTML file. The image files need to be in the same folder as the HTML file, but users do not need to see them when they browse the folder.

Table 6-4 Common Advanced Options *(Continued)*

Auto-delete after this date	Enable this option if you want the item to be automatically deleted. Select a date from the month, day, and year drop-down list when the item is no longer relevant. The default date is the next day. Defining an expiration date removes the item from the Repository when all of the following conditions are met: ■ The expiration date has passed. ■ The Auto-delete check box is checked. ■ The system performs its regular garbage collection (up to an hour after the expiration date). ■ For folders, set auto-delete to occur after all contents have been deleted from the folder.
Enable for View Manager module	Select to allow users to subscribe to this item for viewing in the View Manager module.
Allow users to add this file to the Exceptions Dashboard	If a job or file can report exceptions, enable this option so that users can monitor exceptions from a Personal Page. When an exception occurs during execution of the job, users who have subscribed can be notified by email or through an Exceptions Dashboard indicator.
Automatically generate keywords	If this property is enabled, the system will generate default keywords based on the words contained in the Name and Description fields. For BQY content, the section names are also used as keywords. Searches find this item by its keywords.
Keywords	To add a new keyword, type it in the empty field and choose the right-facing arrows to add it to the list of keywords. To delete a keyword, select it from the list box and choose the left-facing arrows. Creating keywords for each item is highly recommended so that users can search Hyperion Foundation for important information and documents.

Options of OCE Files

OCE files are used by BQY jobs and BQY files to connect to databases. A separate OCE file must be specified for each query of a BQY file or job, except for queries that use Local Results, to enable users to process that query. (For more information on BQY documents, see the Intelligence Clients guides.)

For more information on OCE file properties, see "Properties of BQY Jobs" on page 8-4.

Properties of BQY Files

BQY files have many of the same additional properties as BQY jobs. Refer to Chapter 8, "BQY Jobs," for detail information on the properties.

In the BQY Job Properties section only the part about the Intelligence iServer Options applies to BQY files as well as BQY jobs.

Properties of HTML Files

In addition to the common General Properties and the common Advanced options, HTML files have some special Advanced Options shown in Figure 6-5 and displayed in Table 6-5.

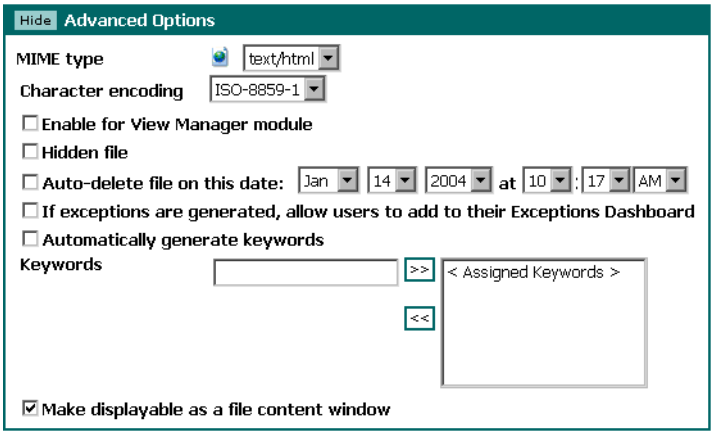


Figure 6-5 Additional Advanced HTML file Options

Table 6-5 Additional Advanced Options of HTML Files

Character encoding	Specify the method of character encoding for the web page. Note: Use UTF8 for non-Latin-1 languages or when using WebSphere or iPlanet native servlet engines.
Make displayable as a file content window	If this property is enabled the contents of this item can be displayed on Personal Pages. (Default is enabled.)

Properties of URLs

In addition to the common General properties and common Advanced options, URLs have some special Advanced Properties shown in Figure 6-6 and displayed in Table 6-6.

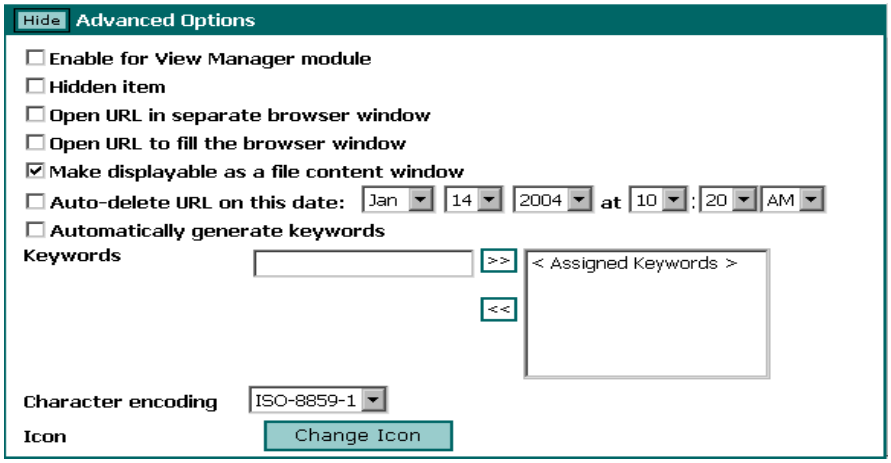


Figure 6-6 Additional Advanced URL Options

Table 6-6 Additional Advanced Options of URLs

URL (in the General Properties group)	Enter the URL starting with either `http.//` or `https://`.
Open URL in separate browser window	If this property is enabled, opening the URL will launch a new browser window for the URL's web page. If this property is disabled, the web page opens in the Browse browser window.
Open URL to fill the browser window	If this property is enabled, when the web page is opened, it will use all of the area used by the Hyperion Foundation web modules. If this property is disabled, then the web page fills only the Content pane, so that the Browse module's Navigation pane, tabs, and so on, are still visible.
Make displayable as a file content window	If this property is enabled the contents of this item can be displayed on Personal Pages. (Default is enabled.)
Character encoding	Specify the method of character encoding for the web page. Note: Use UTF8 for non-Latin-1 languages or when using WebSphere or IPlanet native servlet engine.
Icon	Shows the icon that will be shown for the URL. To change the icon, choose **Change Icon.**
Change Icon button	Select to add a GIF or JPG file from your PC or from the Repository. Set the width and height of the icon to smaller than 24 pixels.

Working with Versions

File items can contain multiple versions. A typical file item is really a collection of versions, even if you have not explicitly published multiple versions. When you publish a file, the resulting item is a collection containing a single version. You can later publish additional versions.

Versions can be revisions of the same file, or completely different files. BQY documents can have multiple versions. If the BQY document is considerably different from the original BQY document, you should publish a new document.

Note BQY jobs and OCE files have one version. To change the published version, use the **Replace** button on the General Properties page. It is important to replace the job or OCE file with a similar file. If the BQY job is considerably different from the original BQY job, you should publish a new job. The system will accept any file as a replacement for a BQY job or an OCE file.

Example You store a series of speeches by the CEO of your company as a single item called *CEO Speaks*. Each speech is in a separate file, and you add each of these files as an additional version of the item. Users do not have to know the name or date of a speech, because all are found under the same name, *CEO Speaks*.

Working with versioned items is mostly effortless. When you choose an item's name, the latest version is displayed. When you move or delete an item, all of its versions are included in the operation. You can also work with a specific version when you want to.

Versions have their own properties that are distinct from the properties of their collection item.

This section describes the properties of versions of files and explains how to manipulate specific versions. This section covers the following topics:

- Adding a Version
- Listing the Versions of a File
- Viewing or Modifying Properties of Versions
- Properties of Versions
- Deleting a Version

Adding a Version

You can publish any file as a version of another file. See "Working with Versions" on page 6-22 for more information on versions.

To publish a version of a file item:

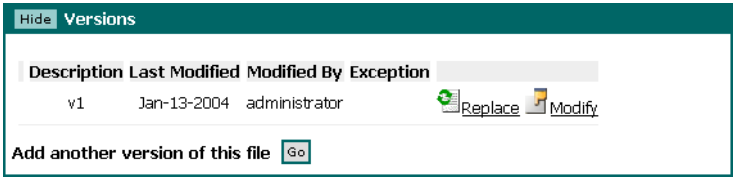
1. **Locate the item in the Browse module.**

2. **Choose Modify Properties for the item.**

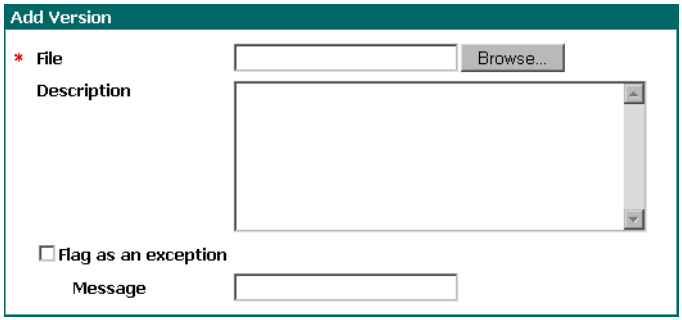
   The Modify Properties page appears.

3. **In the Versions section, choose Go next to *Add another version of this file*.**

   You may need first to choose **Show** to open the Versions section.



4. **Choose Browse and select the file to add as a new version.**



5. **Optionally, enter a Description or enable Flag as an exception.**

6. **Choose Add Version.**

   The Modify File page reappears, with the new version now listed in the Versions section. The version is not added to the Repository yet, however.

7. **Choose OK.**

   The version is added to the Repository as the latest version.

Viewing or Modifying Properties of Versions

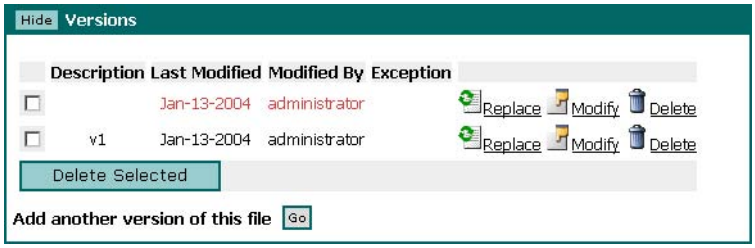
Each version of an item has its own properties.

To view or modify the properties of a version:

1 **In Browse, navigate to the item whose version you want to edit.**

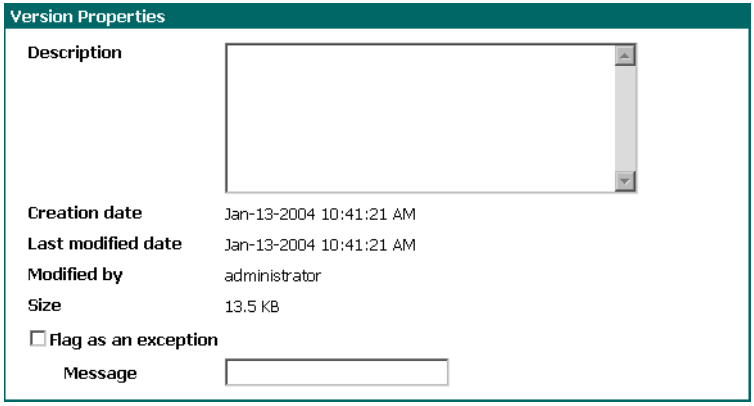
2 **Choose the View Properties or Modify Properties button for the item.**

The properties of the item are displayed.



3 **In the Versions section of the Modify Properties page, choose View or Modify for the version.**

The properties of the version are displayed. The only properties you can modify are *Description*, *Priority, Flag as an Exception*, and *Message* (when Flag as an exception is selected). Refer to "Properties of Versions" on page 6-25 for information on each property.



4 **After modifying properties, choose OK.**

Properties of Versions

Table 6-7 shows all of the properties of versions.

Table 6-7 Properties of Versions

Description	A meaningful description of the version that distinguishes it from other versions. For example, *Using preliminary figures as of 2/03* or *First draft with Marketing's comments*. The length is limited to 254 characters.
Creation date	(Read-only) Date on which the version was created.
Last modified date	(Read-only) Date on which the version was changed. Changing a version can involve replacing it or modifying any of its properties.
Modified by	(Read-only) Name of the user who made the last modification to the version.
Priority	Has values Normal or High. In Browse, a special icon is displayed next to items that have a Priority value of High. Also, users can sort on Priority, and search for high-priority items. (This property is available only if your administrator has activated the Priority feature on your system.)
Size	(Read-only) The file size. This property is set automatically.
Flag as an exception	An exception is an indicator of a condition or result (such as a threshold being reached) generated by an automated process. *Flag as an exception* can be set by a user or by a program. If the file is on a user's Exception Dashboard, and this version is the latest, the state of this property is indicated on the Exceptions Dashboard. For more information about exceptions, see "Using the Exceptions Dashboard" on page 4-24.
Message	Text associated with an exception on this version. When an exception is flagged on the version, a report may print this message, or it may be visible from a user's Exception Dashboard.

Listing the Versions of a File

You can control whether all of the versions of each item are listed in Browse, or only the latest version of each.

To list a file's versions if they are not displayed:

➤ **Choose the Show All Versions button at the upper right of the page.**

When all versions are displayed, the name of the button changes to **Show Latest Version Only**, so that you can toggle between the two settings.

You can also control the number of versions listed on the Browse page through the Browse Preference tab. See "Versions Preferences" on page 3-6.

Deleting a Version

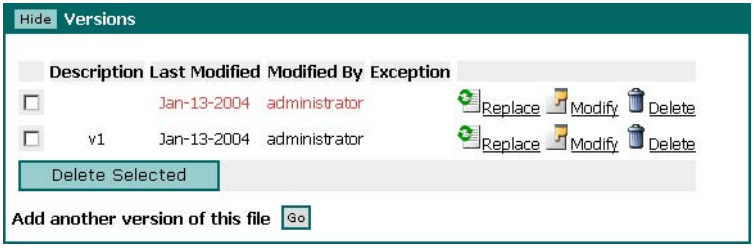
You can delete a single version or you can delete multiple versions at the same time.

To delete a version of an item:

1 In Browse, navigate to the item whose version you want to edit.

2 Choose the **View Properties** or **Modify Properties** button for the item.

The properties of the item are displayed.



3 In the Versions section of the Modify Properties page, select the check box next to the version you want to delete.

4 Choose **Delete Selected**.

Or

1 Choose **Delete** next to the item.

2 Choose **OK** when prompted to delete the item.

Summary

In this chapter you have learned how to publish content using the Browse web module. You have also learned about the different properties associated with the content you are publishing. You have seen how easy it is to add new versions to an existing item.

7 Managing Jobs

In Hyperion Foundation, you can execute jobs from the Browse web module, and you can manage scheduled jobs including time events and job parameter lists from the Job Manager module. Hyperion Foundation can run three types of jobs:

- **BQY job** – A BQY file published in Hyperion Foundation as a job and its associated files.
- **SQR job** – An SQR report or program and its associated files. An SQR job can be secure or nonsecure.
- **Generic job** – A report or program from another software provider (for example, an Oracle report or a Crystal report), and any associated files.

For publishing jobs, see Chapter 6, "General Publishing." For specific job property details, see Chapter 8, "BQY Jobs" or Chapter 9, "SQR and Generic Jobs."

Note You must have the requisite access privileges to run and/or schedule jobs.

In This Chapter

About Job Execution 7-2
Running a Job 7-5
Scheduling a Job 7-7
Creating a New Personal Recurring Time Event 7-13
Modifying Job Output Properties 7-15
Using the Job Manager 7-16

About Job Execution

You can easily run jobs from the Browse web module. Simply choose the Run button for the jobs you want to run, enter the job parameters you are prompted for and see your job output in your browser window. You can also run jobs automatically by scheduling your jobs to run using time events and recurring job parameters.

If your administrator has enabled the pass-through feature, you can set up foreground jobs to run without additional requests for data source login credentials.

You can run jobs in the foreground or in the background depending upon how the job was configured by the publisher.

Foreground Jobs

When a job executes in the foreground, you must wait until the job completes before continuing with other tasks. When a foreground job finishes executing, Hyperion Foundation displays:

- For BQY files or jobs jobs, a link to the output in the folder where the job was published
- For SQR jobs, the HTML frame file
- For generic jobs:
  - The primary output file, if there is only one
  - A list of primary output files, if there are multiple files
  - A list of all output files, if there is no primary one

Background Jobs

When a job is executing in the background, you can perform some other tasks in the foreground. When the background job finishes executing, the output files are written to the repository, and a notification message is displayed on the Job Status page under Notifications in the Job Manager module. The Output button appears next to the job title. Choose the Output button to view the job output.

About Running Jobs

You can use Hyperion Foundation to execute BQY, SQR, and generic jobs in real time or using a schedule.

For how to run a job see "Running a Job" on page 7-5.

About Scheduling Jobs

Scheduling a job allows you to automatically run jobs at a specific date or time and/or on a recurring basis. To schedule a job, you must associate a time event and a job parameter list with the job. All types of jobs can be scheduled through Hyperion Foundation.

Events define the timetable for running a job. *Job Parameters* define the compile time and run time values necessary to execute a job. *Schedules* specify the job you want to execute, as well as the event schedule and job parameter list for running the job.

For how to schedule a job see "Scheduling a Job" on page 7-7.

Events

Events define when the job runs and whether the job runs only once or many times. You can determine whether the job runs every Wednesday, or every fourth Friday, or after a specific event has occurred.

Because events are not associated with a particular job, you can use them to schedule multiple jobs. You can create personal recurring time events that only you can use. You may also have access to public recurring time events and externally triggered events your administrator has created.

You can create events as you schedule a job or from the Manage Events screen on the Job Manager tab. You can also view, modify, access, or delete time events.

The types of events that can be used for scheduling jobs are:

- **Public recurring time events** – Reusable time events created by an administrator and accessible through access control.
- **Personal recurring time events** – Reusable time events created by you and accessible only to you.

- **Externally triggered events** – Date based events created by an administrator and accessible through access control. Jobs are scheduled to run when the event is triggered.
- **Custom time events** – Time events created by you for one time use by a specific job schedule. Custom events are not listed, so they cannot be used by any other job schedule.

Job Parameters

Job parameters are run-time values that are necessary to run a job. The run-time values are the job variables or limits you are prompted for by the job. For some BQY jobs, job parameters also include processing and job output options. For more information on BQY jobs, see "BQY Job Parameters" on page 8-3.

You can save job parameters to:

- Run or schedule jobs without being prompted for the run-time values.
- Share job parameters with other users.
- Run jobs using different parameters on a schedule.

Hyperion Foundation supports the following types of job parameters:

- **Public job parameters** – Reusable named job parameters created by your administrator and accessible to you with the required access privileges.
- **Personal job parameters** – Reusable named job parameters created by you and accessible only by you.
- **Custom job parameters** – Unnamed job parameters created by you and associated with a specific schedule. Custom job parameters are not listed or named and cannot be used with any other schedule. They are deleted when the schedule is deleted.

Note Job parameters can only be created when creating or modifying a job schedule or when running a job. See "Running a Job" on page 7-5 or "Scheduling a Job" on page 7-7 to see how to get to the job parameters section.

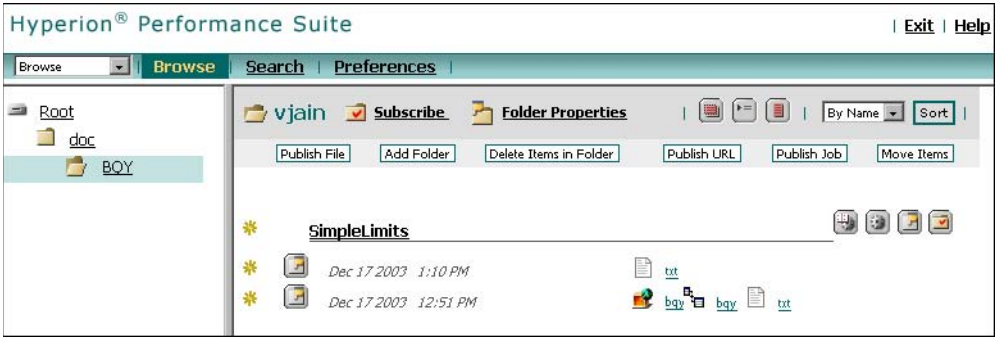
Running a Job

This section provides general instructions for running a job and setting your default job parameters. Details about setting job parameters are covered in "Setting Job Parameters for BQY Jobs" on page 8-14 and "Setting SQR and Generic Job Parameters" on page 9-31.

Note In Windows, if you are running a pre-8.x SQR job and have multiple versions of SQR installed on your machine, you will need to add the SQRDIR entry into the SQR.ini file. The default locations of the SQR.ini file are C:\Program Files\Brio\SQR*Database type* and/or C:\Program Files\Hyperion\SQR*Database type*.

To run a job:

1. **In the Browse module, navigate to the job you want to run and choose either the job title or the Run Job button.**



2. **If database authentication is required, enter the user name and password for each connection in the Database Connectivity section.**

   The Database Connectivity section appears only if database authentication is required.

3. **In the Job Parameters section, start defining new parameters using either an available job parameters list or new values and choose Go.**

   If the job has no run-time variables, the job parameters section is not displayed.

To set personal default job parameters, see "Setting Default Job Parameters" on page 7-6.

If you are using existing parameters, skip Step 4.

4 **Set values, set limits, or define or modify cycles depending upon the type of job you are running.**

See "Setting Job Parameters for BQY Jobs" on page 8-14 or "Setting SQR and Generic Job Parameters" on page 9-31.

5 **Choose Run Job.**

Setting Default Job Parameters

Job parameters selected when jobs are published are called Publisher Defaults. You can override these default job parameters at run time and set your own default job parameters. Your jobs will run with your default job parameters until you change them.

To set your default job parameters:

1 **In the Browse module, navigate to the job you want to run and choose either the job title or the Run Job button.**

2 **Select either an available job parameters list or new values from the drop-down list.**

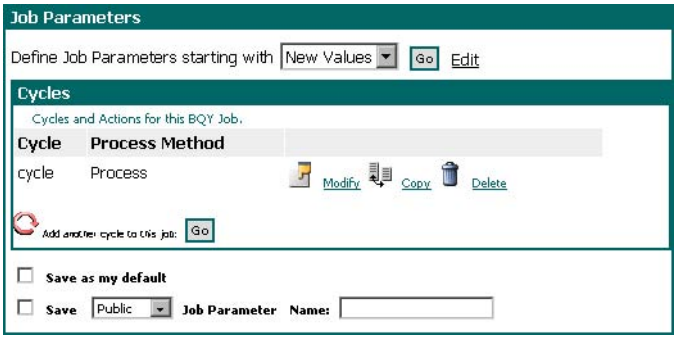
If using an available job parameters list without any modifucations, skip to Step 5.

3 **Set values, set limits, or define or modify cycles depending upon the type of job you are running.**

See "Setting Job Parameters for BQY Jobs" on page 8-14 or "Setting SQR and Generic Job Parameters" on page 9-31.

4 Select **Save Job Parameters** and enter a name in the textbox.

5 Select **Save as my default.**



6 Choose **Run Job.**

Your job parameters will not be saved until you run the job.

Scheduling a Job

This section provides general instructions for scheduling a job. Details about setting parameters are covered in "Setting Job Parameters for BQY Jobs" on page 8-14 and "Setting SQR and Generic Job Parameters" on page 9-31. Details about specifying events is in "Creating a New Personal Recurring Time Event" on page 7-13.

To schedule a job:

1 In the Browse module, navigate to the job you want to schedule and choose the **Schedule Job** button.

2 Choose **Go** next to *Add a new Schedule*.

3 Fill in the properties.

- **Name** – (Required) Whatever you wish to call the item. The Name can contain letters, numbers, the space character, and the underscore character "_".
- **Description** – A meaningful description of the schedule. For example, *Quarter end for all regions*. The length is limited to 254 characters.

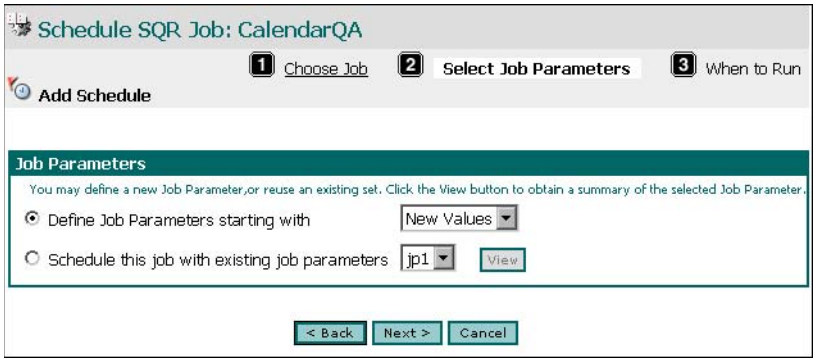
- **Priority** – When jobs are scheduled to process at the same time, jobs with the highest priority number run first. Use any number between 100 (highest) and -100 (lowest) to set priority.
- **Run this job** – Infinitely or a specified number of times. The job automatically becomes inactive after it has run the indicated number of times.
- **User name and Password** – You are prompted for database authentication if it is required.

4 Choose **Next**.

5 In the Job Parameters section of the Select Job Parameters page, select one of the following options:

- To create job parameters from scratch, select **Define job parameters for this job starting with** and select **New Values** from the drop-down list.
- To create new job parameters from existing job parameters, select **Define job parameters for this job starting with** and select an existing job parameter from the drop-down list. This allows you to quickly create a job run which is similar to an existing job run. Make changes to the parameters and save the completed job parameters using a different name.

- To use or view job parameters, select **Schedule this job with existing job parameters** and select the parameters you want to use from the drop-down list. Choose **View** if you want to see the parameters before you move on to the next screen.



If the job has no parameters (no run time variables or limits), the job parameters section is not displayed.

If there are no existing parameters for this job, you will have to create new job parameters.

6 **Choose Next.**

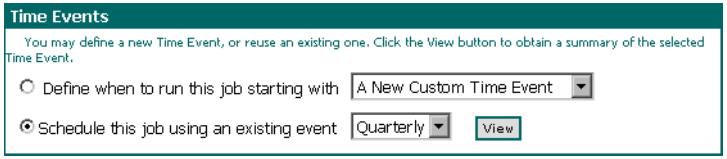
7 **Set values, set limits, or define new cycles depending upon the type of job you are running.**

See "Setting Job Parameters for BQY Jobs" on page 8-14 or "Setting SQR and Generic Job Parameters" on page 9-31.

8 **In the When to Run section, decide if you want to create a new event or use an existing event.**

If there are no existing events, you need to create a new event.

Note If a schedule is associated with an inactive event, the job will not run. You can check the active status of an event by viewing your events on the Manage Events page of the Job Manager module.



- To create a new custom time event, select *Define when to run this job starting with* and select *A New Custom Time Event* from the drop-down list.
- To create a new recurring personal time event from scratch, select *Define when to run this job starting with* and select *A New Recurring Time Event* from the drop-down list.
- To create a new recurring personal time event starting with another time event, select *Define when to run this job starting with*, select an existing time event, and save this time event using a different name.
- To use or view a time event, select *Schedule this job using an existing event* and select the event you want to use. Choose **View** if you want to see the event before you move on to the next screen.

9 **Choose Next.**

If you are using an existing event, skip the next step.

10 **To create a new time event, see "Creating a New Personal Recurring Time Event" on page 7-13.**

11 **If desired, set up notification options.**

If you want to view your notifications in the Job Manager, select *Display notification in Job Manager Module*. See "Viewing Running Jobs and Notifications" on page 7-22.

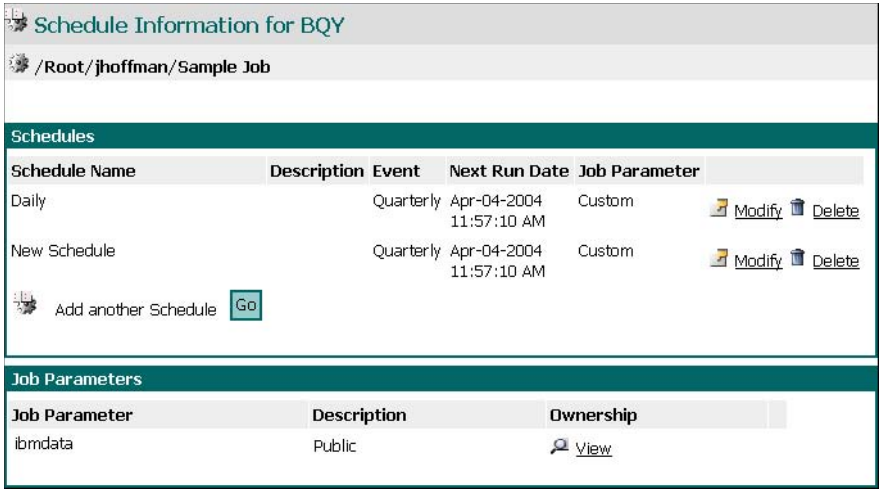
If you want to email the notification, enter email addresses in the text box. Separate email addresses by semicolons, colons, space characters, commas, or new lines.

If you want to attach the latest job output to the email, select *Attach PDF outputs to email messages*.

For SQR jobs, see additional notification options in "Job Output Options when Scheduling SQR jobs" on page 9-33.

12 **Choose Finish to schedule the job.**

Schedule information for your job appears.

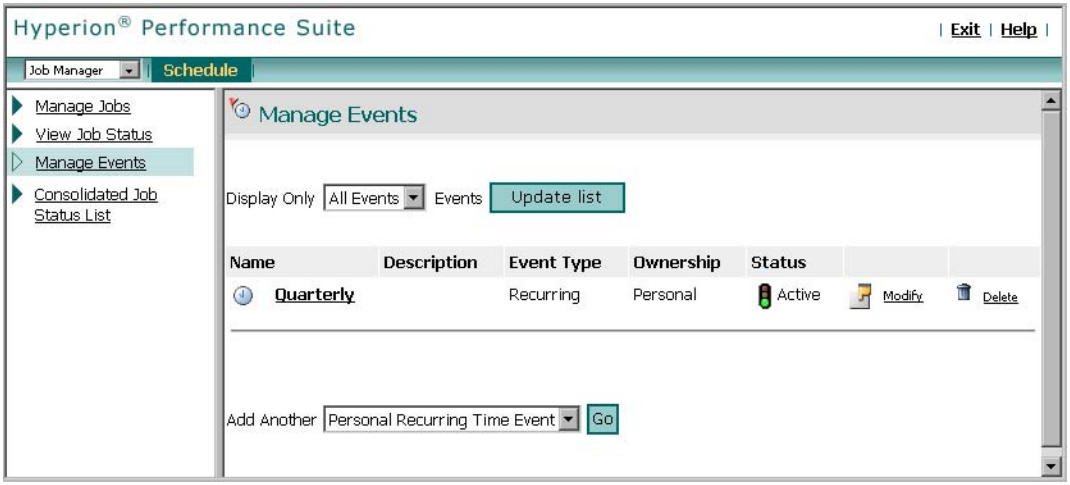


Creating a New Personal Recurring Time Event

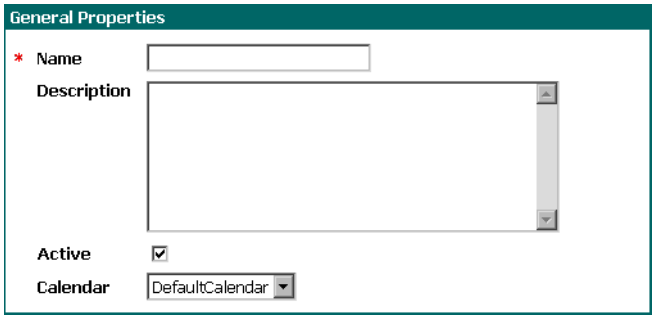
To create a personal recurring time event from the Job Manager Module:

1 Select **Manage Events** in the Navigation pane.

2 Scroll to the bottom of the page and select the type of time event you want to create from the Add Another list and choose **Go**.



3 Enter the name and description of the time event you are creating.



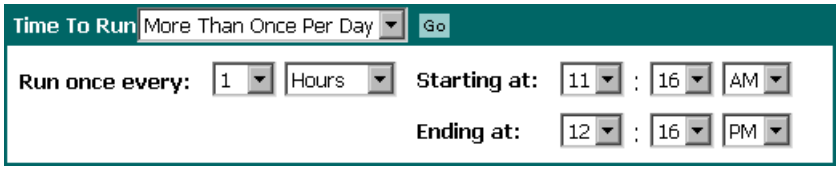
4 Select the calendar you want to use for this time event.

Company calendars are created by your administrator.

5 From the Days to Run list, select which option you want to use and choose **Go** (*By Day* is the default).

By Day, By Week, By Period, By Quarter, and By Year let you specify a recurring time pattern. Advanced Days of Week and Advanced Days of Period give you the option to select specific days with no pattern.

6 From the Time to Run list, select which option you want to use and choose **Go** (*Once per hour* is the default.)



The options include Once Per Day, More Than Once Per Day, or External Event.

7 Enter a Start Date and choose the appropriate radio button to enter either an **End Date** or to accept the default, **No End Date**.

8 Choose **Finish**.

Modifying Job Output Properties

Job output is listed in the same folder as the job. Each run of the job will produce job output which is listed separately. You can modify or view the job output properties depending on your access privileges on the job. For SQR and generic jobs.

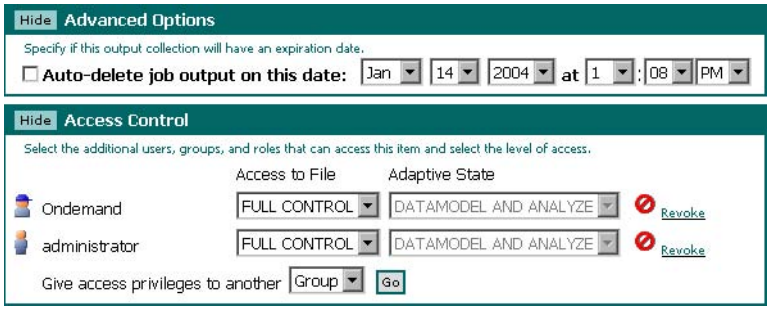
To modify or view job output properties:

1 **Navigate to the job output in the Browse web module and choose the Modify Job Output Properties button.**

2 **Change the properties.**

In the Access Control section, when assigning access to additional users, groups, or roles, the adaptive state is limited to *View Only*. Also, the adaptive state cannot be modified for the existing roles, groups, and users. You can modify the adaptive state for future job output when modifying the access control for the job.

For more information on modifying access control, see "Setting Access Privileges" on page 6-8.



3 **Choose OK when you are finished changing properties.**

Using the Job Manager

You can manage all aspects of your scheduled jobs through the Job Manager module including:

- Viewing a list of all your scheduled jobs with their associated schedules and parameters
- Viewing the job status of your running jobs
- Monitoring your scheduled jobs
- Modifying, deleting, and adding schedules
- Viewing, modifying, and deleting job parameters
- Viewing a list of time events in which you have access
- Creating, modifying, and deleting time events

Viewing Your Scheduled Jobs

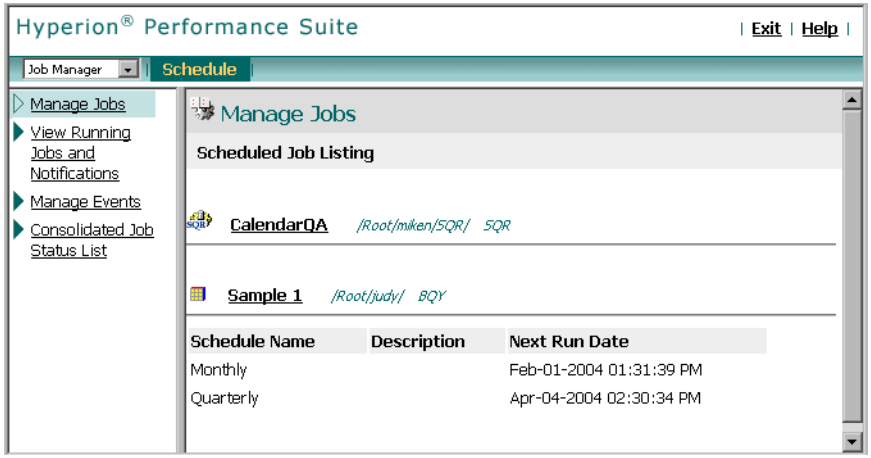
You can view your scheduled jobs from the Manage Jobs page or from the Consolidated Job Status List. The Manage Jobs page lists all of your jobs and their associated schedules. The Consolidated Job Status List page provides a filtered list of your jobs with detailed information about each job.

For more information about the Consolidated Job Status List, see "Monitoring Scheduled Jobs" on page 7-17.

To view a complete list of scheduled jobs:

➤ Select **Manage Jobs** from the Navigation pane.

A listing of scheduled jobs appears in the Content pane.



Monitoring Scheduled Jobs

You can monitor a select list of scheduled jobs and perform the following tasks from the Consolidated Job Status List page:

- Modify job properties
- Modify schedule properties
- Modify event properties
- Add schedules
- Delete schedules

The list of jobs you can monitor from the Consolidated Job Status List is determined by the filters you set. You can save and change your filter criteria whenever you want by going to the filter page from the Consolidated Job Status List page.

To monitor a select list of scheduled jobs:

➤ **Select Consolidated Job Status List from the Navigation pane.**

If you have no default filter criteria, the filter page will appear before the Consolidated Job Status List page. For more information on filtering the Consolidated Job Status List, see "Filtering Consolidated Job Status List" on page 7-19.

Navigate multiple pages by choosing **Next** or **Prev** or by entering a page number in the page text box and choosing **Go**.

Table 7-1 lists the descriptions of the columns on the Consolidated Job Status List page.

Table 7-1 Consolidated Job Status List Columns

Job Name	Displays the name of the job.
Job Owner	Displays the job owner's login id. A non-administrator user must have view access of a job for the job to list.
Schedule Name	Displays the name of the schedule for the job.
Schedule Owner	Displays the scheduler owner's login id. Only administrators can see schedules owned by others.
Event Name	Displays the name of the event.
Last Run Date	Displays the date the job last ran. If the schedule or event is inactive this column displays either Schedule Inactive or Event Inactive.
Last Status	Displays the status of the last time the job ran.
Next Run Date	Displays the next date the job will be running.
Links	Displays image links. Choose a link to modify job properties, modify schedule properties, modify event properties, and/or add schedules.

To modify job properties of a scheduled job:

➤ **Select the Modify Job Property button from the Links column.**

For more information about modifying job properties, see "Viewing or Modifying Properties of an Item" on page 2-12.

To modify schedule properties of a scheduled job:

➤ **Select the Modify Schedule Property button from the Links column.**

For more information about modifying schedule properties, see "Modifying a Schedule" on page 7-23.

To modify an event associated with a scheduled job:

➤ **Select the Modify Event Property button from the Links column.**

For more information about modifying event properties, see "Modifying Events" on page 7-28.

To add a new schedule:

➤ **Select the Add Schedule button from the Links column.**

For more information about creating schedules, see "Adding a Schedule" on page 7-24.

To delete schedules:

➤ **Select the schedules you want to delete and choose Delete checked schedules.**

For more information about deleting schedules, see "Deleting a Schedule" on page 7-24.

Filtering Consolidated Job Status List

You can filter your job list using any of the filter criteria listed in Table 7-2. A particular filter is not set when the text box adjacent to it is blank. The Consolidated Job Status List will be sorted by the filter you choose in the Default Sort Order field of the filter page.

To set filters and sort criteria for the Consolidated Job Status List:

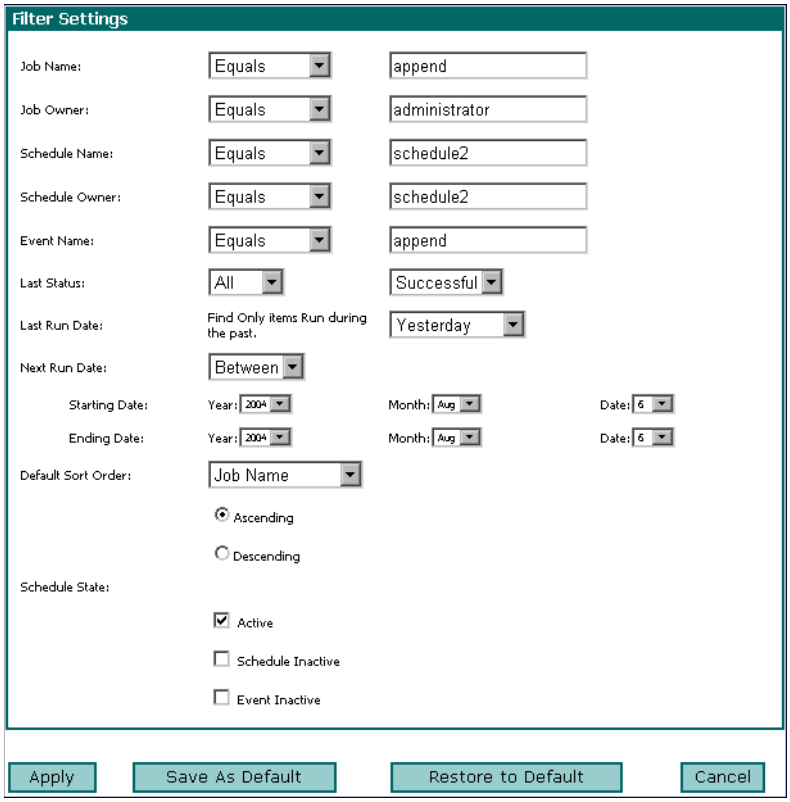
1 **Go to the filter page.**

a. If you do not have default filter criteria, select Consolidated Job Status List from the Job Manager navigation pane.

b. If you do have default filter values, choose Set Job List Filters from the top of the Consolidated Job Status List page.

2 **Select the filters you want to use.**

See Table 7-2 for more details on the filter criteria.



3 **Determine the sort order by selecting the Default Sort Order from the drop-down list and the radio button indicating ascending or descending order.**

The default sort filter is the job name.

4 **Choose Apply, Save As Default, Restore to Default, or Cancel.**

Apply saves your values for one session. Save as default saves your values as your default values. Restore to default retrieves the values you last saved as your default values. Cancel saves no values.

Table 7-2 Job Filters

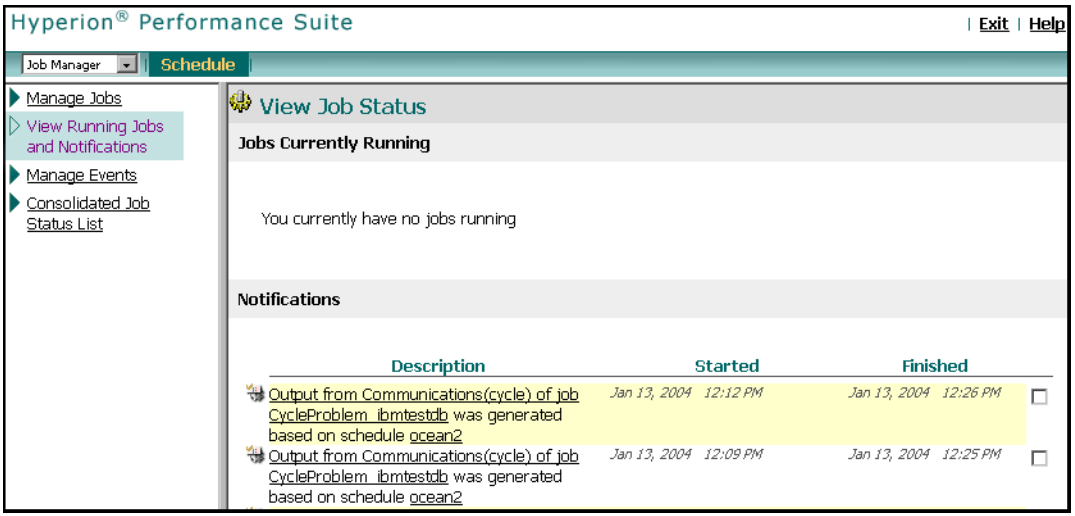
Job Name	Select **Equals**, **Contains**, **Ends with**, or **Begins with** from the drop-down list and enter text in the text box.
Job Owner	Select **Equals**, **Contains**, **Ends with**, or **Begins with** from the drop-down list and enter text in the text box.
Schedule Name	Select **Equals**, **Contains**, **Ends with**, or **Begins with** from the drop-down list and enter text in the text box.
Schedule Owner	Select **Equals**, **Contains**, **Ends with**, or **Begins with** from the drop-down list and enter text in the text box.
Event Name	Select **Equals**, **Contains**, **Ends with**, or **Begins with** from the drop-down list and enter text in the text box.
Last Status	Select **All**, **Is**, or **Is not** from the first drop-down list and **Successful**, **Failed**, or **Cancelled** from the second drop-down.
Last Run Date	Select the time period from the drop-down list.
Next Run Date	Select **After**, **Between**, or **Before** from the drop-down list and the year, month, and day for your selection.
Default Sort Order	Select a filter criteria from the drop-down list in which the list will sort. Select a radio button for ascending or descending sort order.
Schedule State	Select the desired filter(s) for the schedule state. Active is the default.

Viewing Running Jobs and Notifications

To view the status of your running jobs:

➤ **Select View Running Jobs and Notification from the Navigation pane.**

Two lists appear in the Content pane: a listing of your jobs currently running and a listing of notifications of completed jobs you set up to receive notification from.



You can delete job completion notifications one at a time or all at the same time.

- To delete a job completion notification, select the box next to the notification, scroll to the bottom of the Job Status page, and choose **Delete Selected**.
- To delete all of the notifications, scroll to the bottom of the Job Status page, select **Select all displayed messages**, and choose **Delete Selected**.

Modifying a Schedule

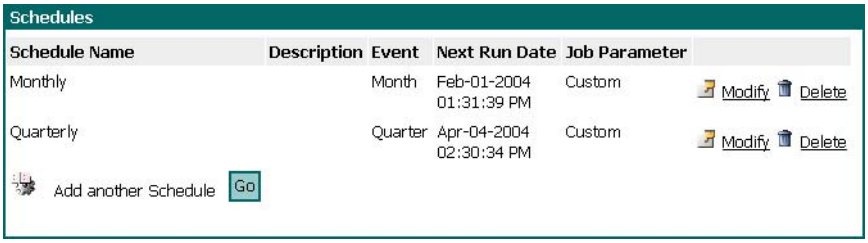
When your scheduling needs for a job changes, you can modify the schedule from the Job Manager module.

To modify a schedule:

1 **Select the job from the Scheduled Job listing.**

A schedule and parameter list for the job appears.

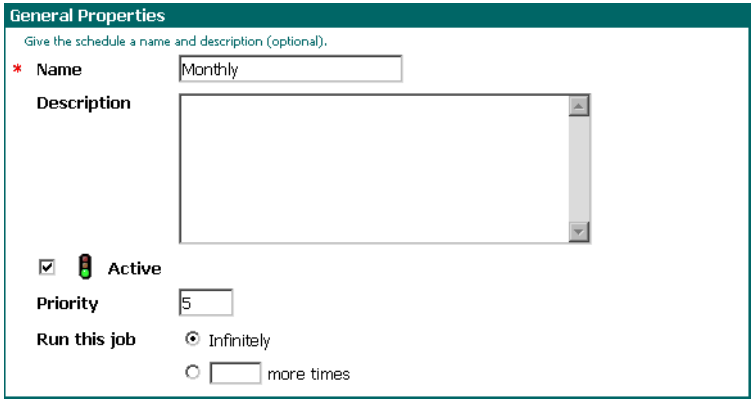
2 **Choose Modify for the schedule you want to change.**



3 **Change the properties you want to modify.**

Choose the link next to the numbered steps for the specific properties you need to change.

For details on the properties, see "Scheduling a Job" on page 7-7. In modify you can deactivate or activate the schedule on the General Properties page by toggling between Active and Inactive.



4 **After you modify the properties on a page, choose Apply if you have more properties to modify. Choose OK if you are done modifying properties.**

Choosing OK returns you to the Schedule Information page of the job you are modifying.

Deleting a Schedule

When you no longer use a schedule, you can delete the schedule from the Job Manager module.

To delete a schedule:

➤ **Choose Delete for the schedule you want to delete from the schedule information list.**

The schedule is deleted from all job schedule lists.

Adding a Schedule

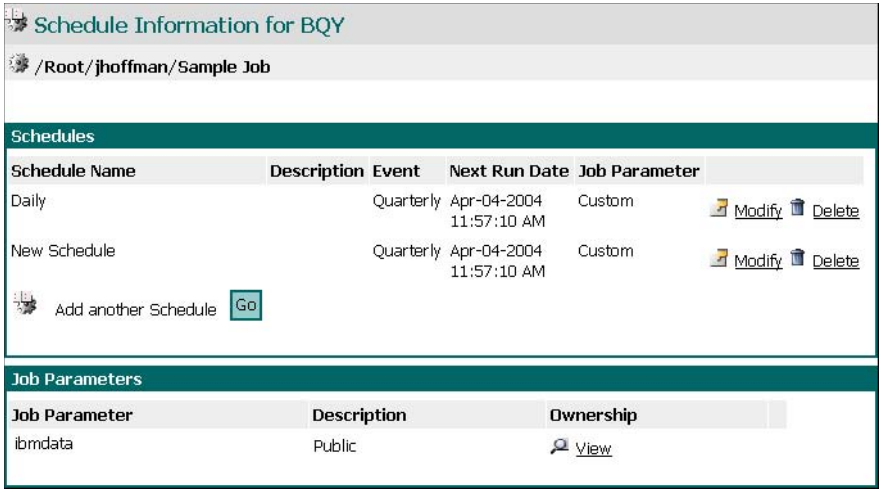
You can add another schedule from the Job Manager module.

To add a schedule:

1 **Select the job from the Scheduled Job listing.**

A schedule and parameter list for the job will appear.

2 **Choose Go next to Add another Schedule.**



3 **Follow the instructions in "Scheduling a Job" on page 7-7 starting on Step 3.**

Viewing Job Parameters

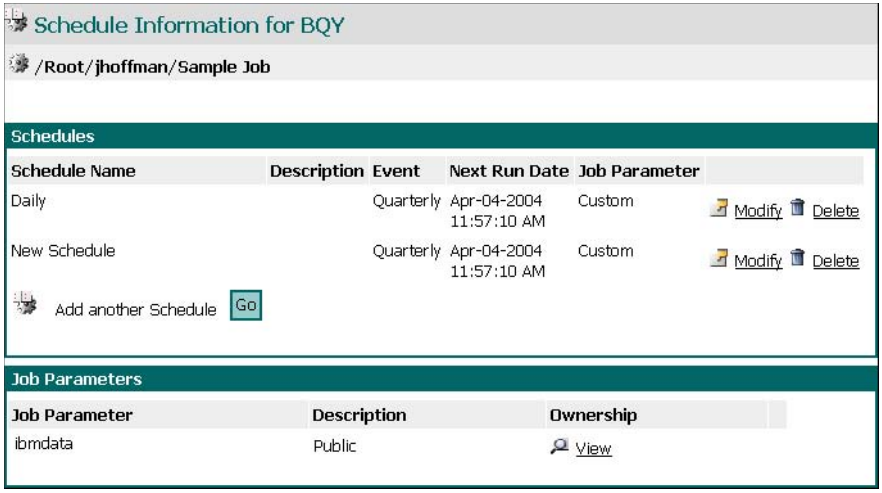
The Job Manager module gives you a list of all the job parameters associated with a particular job.

To view job parameters:

1 **Select the job from the Scheduled Job listing.**

A schedule and job parameter list for the job appears on the Schedule Information page.

2 **Choose View for the job parameters you want to see.**



Modifying Job Parameters

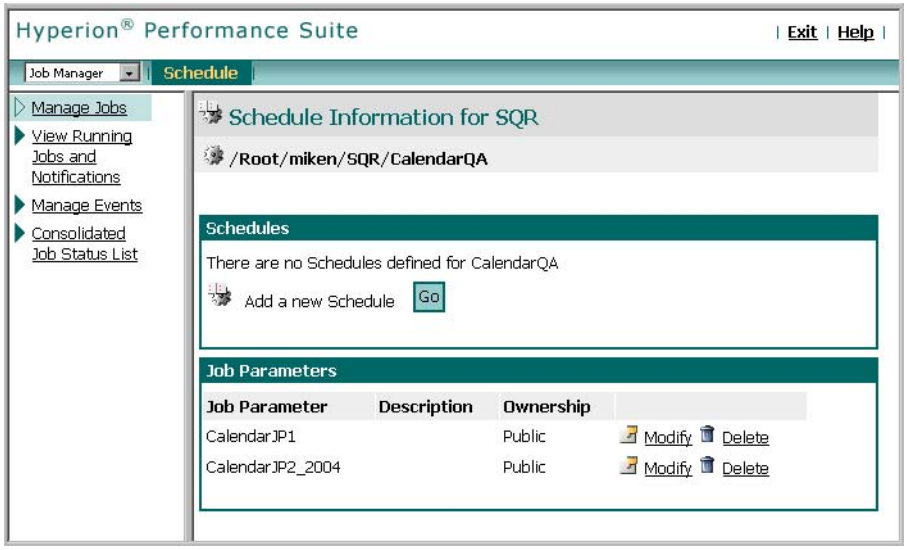
You can modify the properties of job parameters from the Job Manager module.

To modify job parameters:

1 **Select the job from the Scheduled Job listing.**

A schedule and job parameter list for the job appears.

2 **Choose Modify for the job parameters you want to change.**



3 **Change the properties you want to modify.**

You can either move through all of the property pages using **Next** or choose the link next to the numbered steps for specific properties. For SQR and generic jobs, see "Setting SQR and Generic Job Parameters" on page 9-31. For BQY jobs, see "Setting Job Parameters for BQY Jobs" on page 8-14.

4 **Choose OK to get back to the schedule information list.**

Deleting Job Parameters

You can delete job parameters that are not being used by a schedule.

To delete job parameters from the Job Manager module:

1 **Select the scheduled job that the parameters are associated with.**

A list of all the schedules and job parameters for the job appears.

2 **Select Delete next to the job parameters and confirm deletion by choosing OK.**

If no schedules are associated with it, the job parameter is deleted.

If any schedules are associated with it, you must associate the schedule with other job parameters by modifying the schedule.

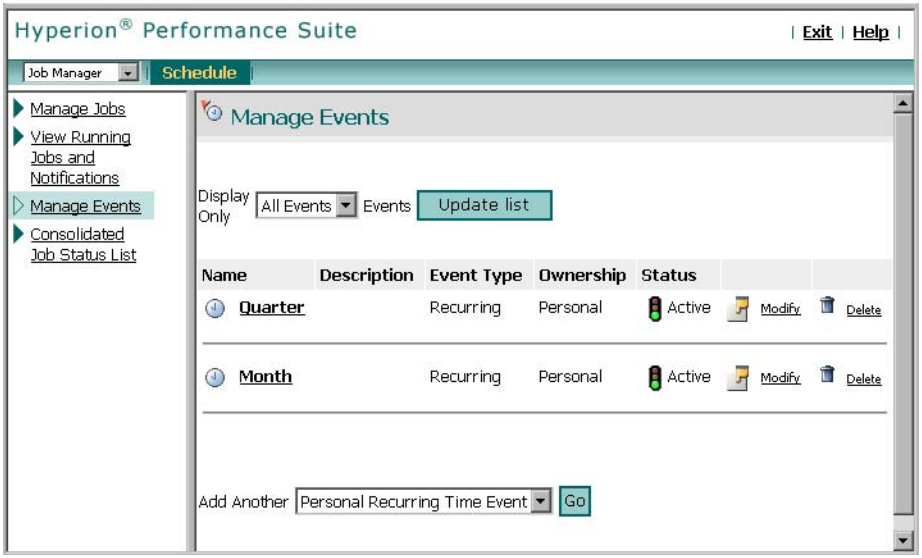
Viewing Events

You can view all of your available events from the Job Manager module.

To view available events from the Job Manager module:

1 **Select Manage Events in the Navigation pane.**

A list of available recurring and externally triggered events appears.



2 **To filter the events list, select either Public or Personal from the Display only list and choose Update List.**

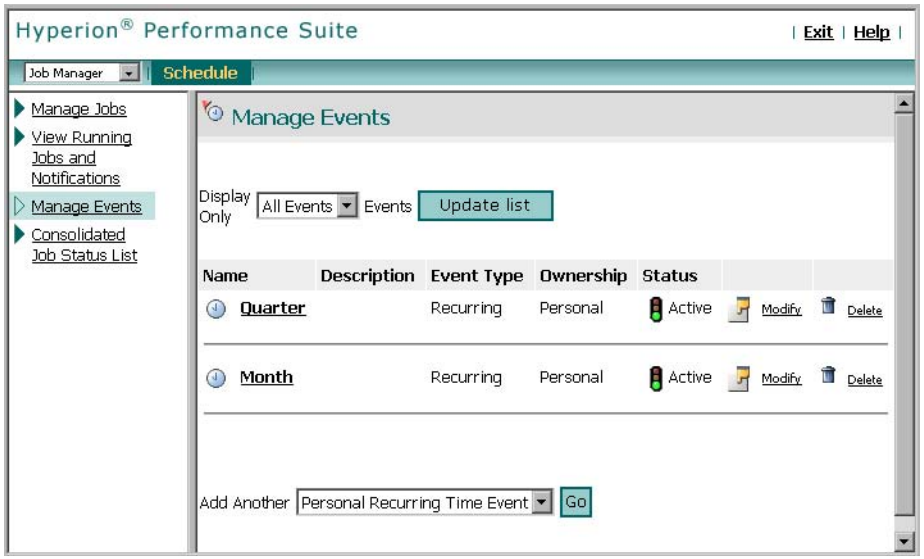
Modifying Events

You can modify events you created from the Job Manager module.

To modify an event from the Job Manager module:

1 **Select Manage Events in the Navigation pane.**

A list of all available events appears.



2 **Choose the event title or select Modify next to the event.**

3 **Change any of the properties listed.**

4 **Choose Finish.**

The modified event appears in the events list.

Deleting Events

You can delete events you created that are not being used by a schedule or another event. For example, if an external event is used to trigger a recurring event, the recurring event needs to be deleted or disassociated from the external event before the external event can be deleted.

To delete an event from the Job Manager module:

1. **Choose Manage Events on the Navigation pane.**

   A list of all available time events appears.

2. **Select Delete next to the time event and confirm deletion by choosing OK.**

   If no schedules or external events are associated with it, the time event is deleted.

   If any schedules are associated with the time event you want to delete, you need to associate the schedules with different time events by modifying the schedule.

   If any external events are associated with the time event you want to delete, you need to disassociate the time event from the external event by modifying the time event or deleting the external event.

Summary

In this chapter you have learned how to execute jobs either in the foreground or the background using time events and job parameter lists. You have also learned how to manage your jobs using the Job Manager web module.

8 BQY Jobs

The basic procedures for publishing, executing, and scheduling BQY jobs are located in Chapter 6, “General Publishing” and Chapter 7, “Managing Jobs”. This chapter details the procedures and the properties specific to BQY jobs and OCE files. OCE files are the connection files that BQY jobs and BQY documents use to connect to data sources for processing queries.

In This Chapter

About BQY Jobs 8-2
Properties of BQY Jobs 8-4
Options of OCE Files 8-11
Setting Job Parameters for BQY Jobs 8-14
Job Parameter Options for BQY Jobs 8-18
Example: Publishing and Scheduling a BQY Job 8-26

About BQY Jobs

BQY jobs are created with Designer or Explorer. You can publish, execute or run, and schedule BQY jobs. BQY jobs are defined through the use of properties and parameters.

BQY Job Publishing

Before publishing a BQY job, have the following information available for entry:

- OCE file names to connect to the database for processing queries.
- Custom calendar name, if not using the default calendar to resolve dynamic date parameters.
- Limit names and values, if running a job with parameters that need to be specified. For more information on limits and parameters, see "BQY Job Parameters" on page 8-3.
- Email addresses, if you want to email the results directly to users.
- Access to an output directory, if you want to send your results to a directory.
- Database create and insert privileges, if you are processing the results to a database table.
- Database grant access, if you want to give additional users access to a database table.

For instructions on publishing a BQY job, see "Example: Publishing and Scheduling a BQY Job" on page 8-26.

BQYs Using Pass-Through

The pass-through feature allows users to log on once and access reports' data sources without additional authentication. Pass-through is enabled per authentication system and then per OCE file. Pass-through can be used for foreground jobs and all BQY documents.

Talk to your administrator about enabling specific authentication systems for pass-through. When pass-through is enabled, you can then enable or disable pass-through for OCE files.

BQY Job Parameters

BQY job parameters include run-time values, processing options, and job output options. Processing and job output options are defined using cycles and actions. A cycle contains job actions and job limits. A*ctions* define how a document is processed and how results are distributed. *Limits* are the values for the run-time variables.The job cycles are named and associated with a particular job.

The owner (or publisher) of the job specifies when publishing the job whether users can create more cycles (multiple-cycle jobs) or only use the default cycle (single-cycle jobs).

- **Single-cycle jobs** – Limited to one cycle. The default processing and printing actions are used. All single-cycle job results are processed to a BQY file as job output. The job output is listed with the job in the Browse item list.
- **Multiple-cycle jobs** – Processed according to how many cycles are defined. Cycles can be created using different processing, printing, and exporting actions. You can set up a job to process as many times as necessary at each scheduled run with different parameters (or limits) and job output options.

Example

Your document queries sales transactions within a certain region. The region is specified through a variable limit on the query to make the appropriate data available to each sales manager on Monday mornings.

When scheduling the job, you can add a job run cycle for each region. By resolving the variable limit for each run to retrieve numbers only for one region, you can then email the numbers from that run directly to the appropriate regional manager. All of the job run cycles are part of the same job, which is easier to track and update.

Properties of BQY Jobs

The BQY job properties for publishing and modifying BQY jobs are described in this section. For details on the General properties and the common Advanced options, see the “Common Properties” on page 6-14.

BQY documents have many of the same additional properties as BQY jobs. On the BQY Job Parameters page only the Intelligence iServer Options apply to BQY documents as well as BQY jobs.

The following topics detail BQY job properties:

- Additional Advanced Options
- Query Properties
- BQY Job Properties
- Job Defaults

Additional Advanced Options

These options shown in Figure 8-1 and displayed in Table 8-1 are in addition to the common Advanced properties detailed in “Common Properties” on page 6-14.

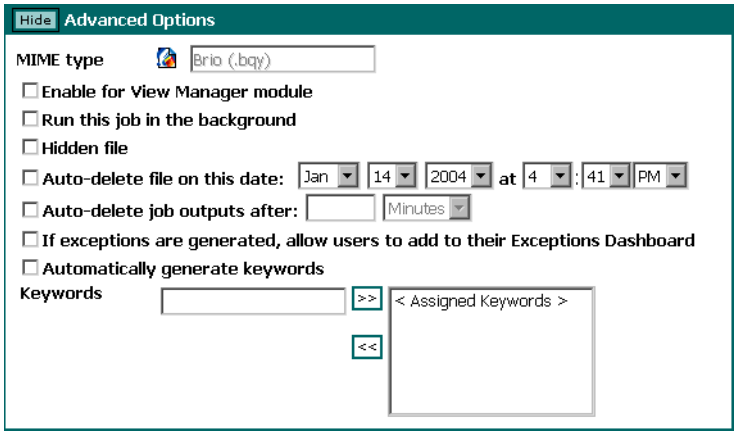


Figure 8-1 Additional Advanced Options for BQY Jobs

Table 8-1 Additional Advanced Options for BQY Jobs

Run this Job in Background	Enable to run your job in the background.
Auto-delete job outputs after	Select time period from the drop-down list and enter numeric to specify when the job output should be automatically deleted.

Query Properties

Use the Query Properties shown in Figure 8-2 and detailed in Table 8-2 to set up or change the database connections for the job.

OCE files are used by BQY jobs and BQY files to connect to databases. Each query in a BQY document can use a different database. A separate OCE file can be specified for each query of a BQY file or job.

Before publishing BQY files and jobs you need access to all of the OCEs your BQY document uses. If you do not have access to the OCE files they will not appear in the drop-down connection list. Talk to your administrator about getting access to the OCEs you need.

If you want to use pass-through, see "Pass-Through Using Multiple OCE Files" on page 8-11.

Note If no OCE file is specified for a query, the user accessing the BQY document cannot process that query unless it is a query that uses only Local Results.

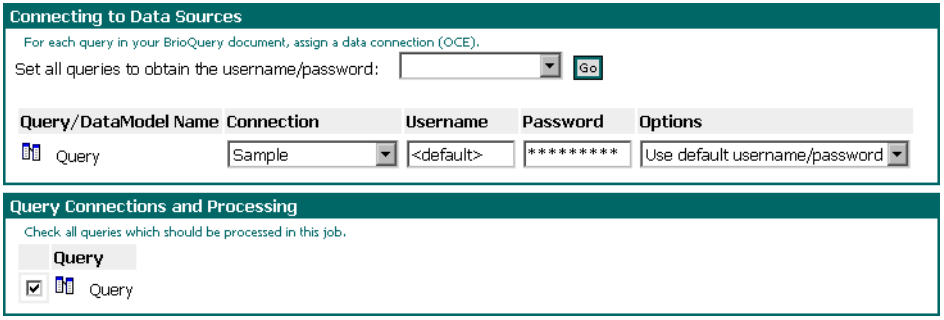


Figure 8-2 Data Sources and Query Properties

Table 8-2 Data Sources and Query Properties

Set all queries to obtain the user name/password	If you want to use a common method to obtain all the user name/password combinations for all queries, select one of the following from the drop-down list and choose **Go**: ■ From OCE default — Uses the username/password method selected for the OCE file when the OCE file was published. The word "<default>" appears in the username and password fields. ■ Prompt end-user — Prompts the end-user to supply a valid user name and password per data connection. The word "<prompt>" appears in the username and password fields. ■ Specify now — Prompts the publisher to supply a valid user name and password for all queries. The user name the publisher specifies appears in all the user name fields. The password specified is starred out. You can override individual user name/password combinations by selecting a method from the options list for each specific query connection.
Connection	Select the correct OCE file to use with this query. If the query uses only Local Results, select <No connection> from the drop-down list. If you want to use pass-through, see "Pass-Through Using Multiple OCE Files" on page 8-11.
User name	Enter the user name you want to use for this query or set globally with the Connecting to Data Sources drop-down list or set individually with the options list.
Password	Enter the password you want to use for this query or set globally with the Connecting to Data Sources drop-down list or set individually with the options list.
Options	Set the user name/password for this query using the method selected: OCE default or Prompt end-user. See descriptions for these methods under Connecting to Data Sources in this table.
Query Connections and Processing	Check all queries you want to process at run time.

BQY Job Properties

The BQY job properties page shown in Figure 8-3 and Figure 8-4 and displayed in Table 8-3 and Table 8-4 contains General Properties and the Intelligence iServer options.

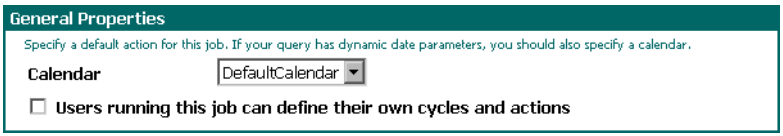


Figure 8-3 BQY General Properties

Table 8-3 BQY General Properties

Calendar	Select a calendar from the drop-down list for resolving dynamic date parameters.
Users running this job can define their own cycles and actions	Enable to allow users to define cycles and parameters for this job creating a multiple-cycle job. The default is disabled (single-cycle jobs) by default. Only single-cycle jobs can be viewed in the View Manager. **Note:** You must check this option in order to be able to modify it at a later time.

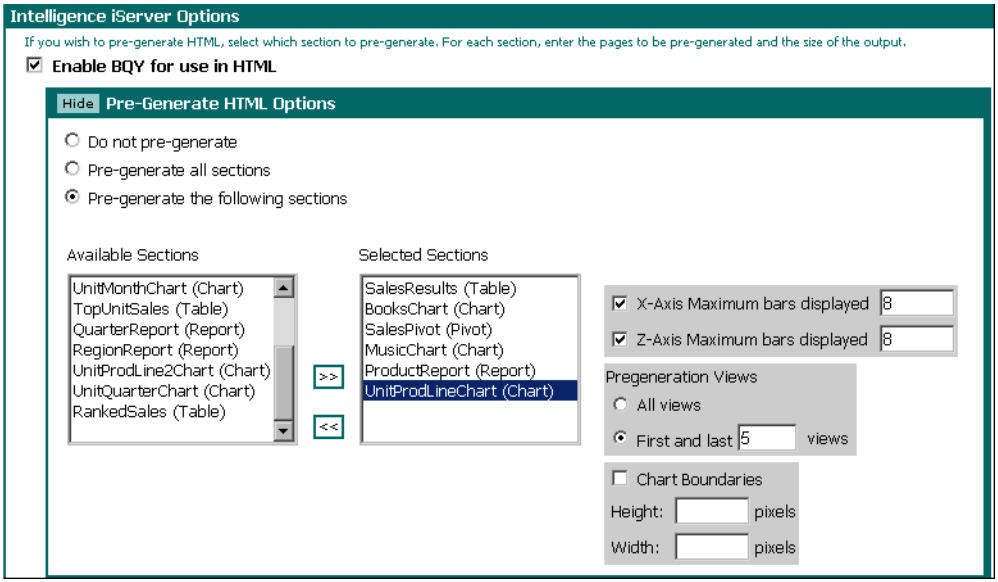


Figure 8-4 Intelligence iServer Options

Table 8-4 Intelligence iServer Options

Enable BQY for use in HTML	Enable if you want the BQY file to be displayed in a browser using the Intelligence iServer web module.
Do not pre-generate	Content is generated in HTML when the BQY file is opened. The bounding rectangle size is based on dimensions specified when the file was created.
Pre-generate all sections	Pre-generates the HTML for all sections.The Intelligence iServer uses default values from the BQY file for the bounding rectangle and paging.
Pre-generate the following sections	Pre-generates the HTML for single or multiple sections. Paging and sizing options are available when a section is highlighted in Selected Sections. This option is used in conjunction with the Available Sections, Selected Sections, All pages, First and last pages, Height and Width options below. Paging and sizing information can only be specified on a section-by-section basis. If paging information does not apply to a section, the paging section is deactivated.
Available Sections	Displays all sections available for pre-generation in the BQY file. Select each section you wish to pre-generate and choose **>>** to move it to the *Selected Sections* list box.
Selected Sections	Displays the sections that will be pre-generated. When you select a section, the bounding rectangle size is automatically populated by values stored in the Intelligence Service, in row or pixel format depending upon the section type. To remove a selected section, choose the section and then choose **<<** to move it to the Available sections list box. If a user publishes another version of a BQY file, and new sections have been added to the file, the newly added sections will not be displayed here, unless the BQY file is republished.
All pages	Enables pre-generation of all pages of a section. Enabling this option may place high demands on the Repository.
First and last pages	Specify the first and last number of pages for which you want to pre-generate the HTML. By default, the page value of this option is five pages. The First and Last pages option is the default page value for all selected sections.

Table 8-4 Intelligence iServer Options *(Continued)*

Vertical and Horizontal Page Break	Specify page breaks either in rows, columns, or pixels. The default is 100 rows (vertical) and 100 columns (horizontal).
Chart Boundaries	Specify in pixels the maximum height and width of a chart. This is blank by default.
X-axis and Z-axis maximum bars displayed	For bar charts, specify the maximum number of bars to display on the X and Z axis. The default is 8.

If you enable the option to use HTML, you have the option to pregenerate the BQY sections in HTML. Pre-generation of sections improves the initial response time for users when accessing the BQY file with the Intelligence iServer.

The last saved section (or the first open section) in the document always gets pre-generated whether you specify it or not. If you did not specify pre-generation of the last saved section (first open section), then only the first page of that section is pre-generated.

Note Pre-generation is not recommended if the data is constantly changing. Row Level Security is not applied in pre-generation.

After you set the BQY job properties, the following button selection (Figure 8-5) appears at the end of the page when publishing a BQY job.

Figure 8-5 Buttons on the BQY Job Properties Page

Choose **Next** if your job has variables and you need to enter run-time defaults for the variables. Choose **Schedule Now** if you do not have any run-time variables and you want to set up a schedule to run the job now. Choose **Finish** if you do not have any run-time variables and you do not want to schedule the

job now. You can schedule the job at any time from the Browse web module. See “Scheduling a Job” on page 7-7 for more information about scheduling jobs.

Job Defaults

The Job Defaults page shown in Figure 8-6 and detailed in Table 8-5gives you the option to include HTML as a default job output format and to set default job parameter values. For details on setting job parameter values, see “Setting Job Parameters for BQY Jobs” on page 8-14.

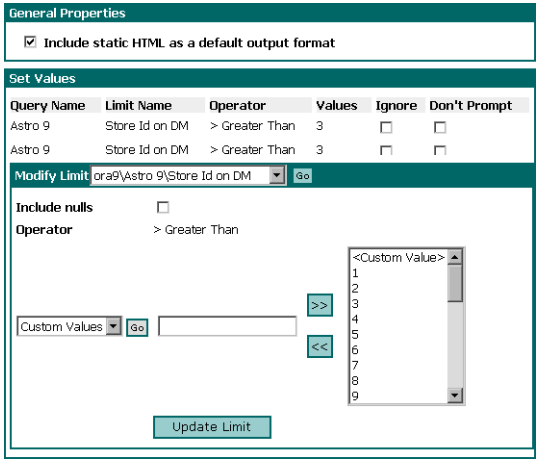


Figure 8-6 Job Defaults

Table 8-5 Job Defaults

Include static HTML as a default output format	Select this option to make HTML your default output format along with the standard default output format which is the standard BQY document.
Set Values	Set your default job parameter values. For field definitions to set values, see “Setting Job Parameters for BQY Jobs” on page 8-14.

The following button selection (Figure 8-7) appears at the end of the Job Defaults page when publishing a BQY job.

Figure 8-7 Buttons on the Job Defaults Page

Choose **Schedule Now** if you want to set up a schedule to run the job now. Choose **Finish** if you do not want to schedule the job now. You can schedule the job at any time from the Browse web module. See "Scheduling a Job" on page 7-7 for more information about scheduling jobs.

Options of OCE Files

OCE files are used by BQY jobs and BQY files to connect to databases. A separate OCE file must be specified for each query of a BQY file or job, except for queries that use only Local Results, to enable users to process that query. For more information on BQY documents, see the Intelligence Clients guides.

Pass-Through Using Multiple OCE Files

If enabled by your administrator, pass-through allows you to access data sources without entering a user name and password for each data source. In order for pass-through to work for BQY jobs or files associated with multiple OCEs, the following conditions are necessary:

- OCEs must be configured for pass-through.
- Credentials required to access each data source must be identical.

Note Hyperion recommends selecting similarly configured OCE files when publishing a BQY. In order to allow publishing users to make this selection, the OCEs should be named in a way that indicates whether the OCE is configured for pass-through.

When processing BQY jobs and files with some OCEs configured for pass-through and other OCEs not configured for pass-through, the behavior of the BQY is as follows:

- OCEs configured for pass-through – The user is not prompted for logon credentials.
- OCEs not configured for pass-through – The credential option selected when the BQY job or file was published (prompt user, specify now, or use OCE default) is used.

Thus a user may be prompted to log on if the BQY is published with a mixture of pass-through configured and not pass-through configured OCE files.

Caution! All pass-through enabled OCEs specified in a BQY job or file must have identical database credentials in order for all queries to process in that BQY job or file.

Processing OCE Options

In addition to the common General properties and common Advanced options, two additional types of options are offered for OCE files: Processing OCE Options and Meta OCE Options.

Processing OCE Options are used to store the connection information for your OCE. ReviewFigure 8-8 and Table 8-6 for information on Processing OCE Options.

Figure 8-8 Processing OCE Options

Table 8-6 Processing OCE Options

Data source access	Choose a method for the OCE file to obtain a user name and password when running a job or processing a file: ■ Use the user name/password specified below — Enter the database user name and password in the fields provided here. ■ Prompt for user name/password — You will be prompted for database user name and password at the time this BQY job is run or scheduled or the BQY file is processed. This is the default when pass-through is not enabled.

Table 8-6 Processing OCE Options *(Continued)*

User name	If Data source access is set to use this field, fill in the database user name here.
Password	If Data source access is set to use this field, fill in the database password here.
Allow pass-through where end user's authentication system is enabled for it	Enable to allow users to use pass-through credentials for accessing data sources.

Meta OCE Options are used to store a file that contains extra information about the OCE. ReviewFigure 8-9 and Table 8-7 for information on Meta OCE Options.

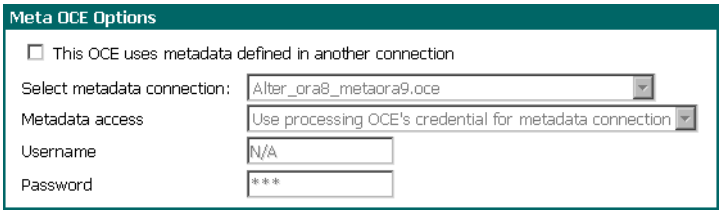


Figure 8-9 Meta OCE Options

Table 8-7 Meta Options for OCE Files

This OCE uses metadata defined in another connection	Enable if metadata is used and its connection is not specified in this OCE file. All the fields in this group are disabled if this field is not selected.
Select metadata connection	Select the OCE file for the metadata here if metadata is used and its connection is not specified in this OCE file.
Use processing OCE's credential for metadata connection	Enable to use the same user name and password associated with the OCE to access the metadata.
Use specified user name/password	Enable to use the user name and password specified here to access the metadata.

Setting Job Parameters for BQY Jobs

Job parameters are different for each type of BQY job: single-cycle and multiple-cycle. With single-cycle jobs the job parameters contain the job variables or limits. With multiple-cycle jobs, the job parameters contain the job variables or limits and the job cycles which contain the processing options and the job actions.

Note Job parameters can only be created when creating or modifying a job schedule or when running a job. See "Running a Job" on page 7-5 or "Scheduling a Job" on page 7-7 to see how to get to the first step of this procedure.

Single-Cycle Job Parameters

Only single-cycle jobs with variables or limits have job parameters.

Note Job parameters can only be created when creating or modifying a job schedule or when running a job. See “Running a Job” on page 7-5 or “Scheduling a Job” on page 7-7 to see how to get to the first step of this procedure.

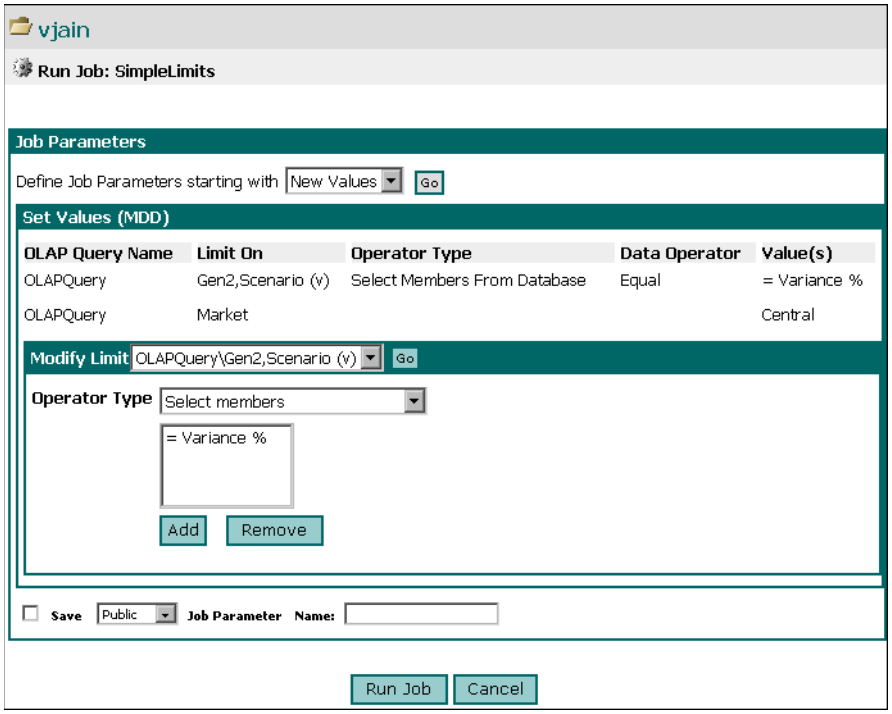
To set job parameters for a single-cycle BQY job:

1. **Select a limit from the Modify Limit list and choose Go.**

   The table above the Modify Limit field displays the current values for this limit.

2. **Choose new values to use for this limit and choose Update Limit. (For details on limit options, see Table 8-8).**

3. **If you want to save your job parameters, select Save Job Parameters and enter a name.**



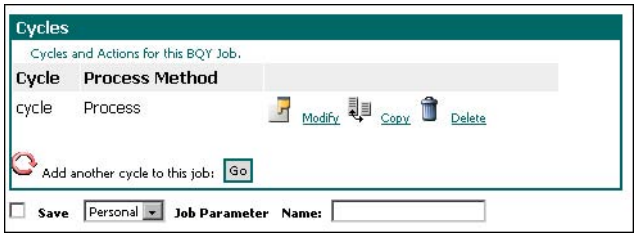
Multiple-Cycle Job Parameters

When creating job parameters for multiple-cycle jobs you can save both the cycles and the job parameters that are associated with the job you are running or scheduling.

Note Job parameters can only be created when creating or modifying a job schedule or when running a job. See "Running a Job" on page 7-5 or "Scheduling a Job" on page 7-7 to see how to get to the first step of this procedure.

To set job parameters for a multiple-cycle BQY job:

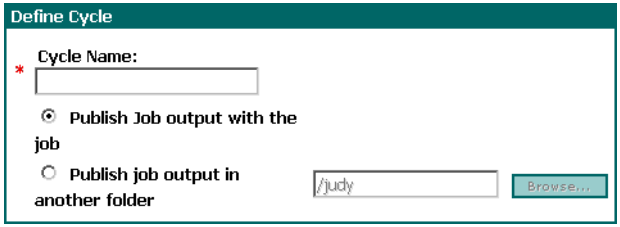
1. **Modify a cycle or add a cycle by choosing Modify for an existing cycle or choose Go to add another cycle to this job.**



2. **Enter a cycle name.**

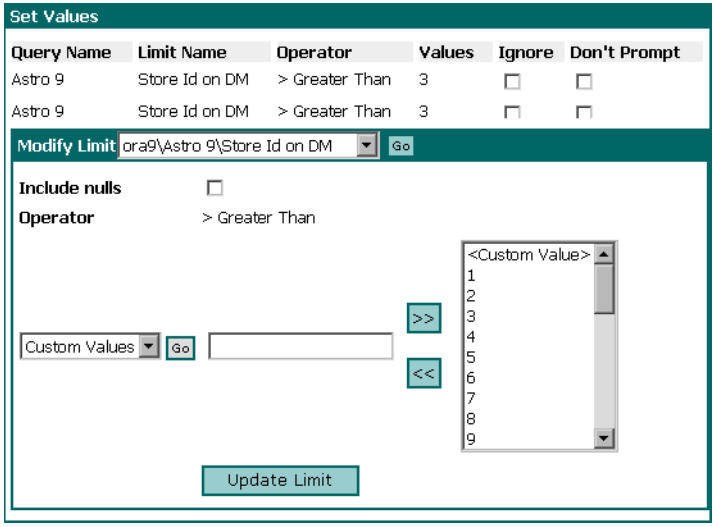
3. **Select to either Publish Job Output with the job or Publish job output in another folder.**

   If you selected publish output to another folder, enter or browse for the folder.



4 **Select a limit from the Modify Limit list and choose Go.**

The table above the Modify Limit field displays the current values for all the limits.



5 **Choose the new values for that limit and choose Update Limit.**

For details on limit options, see Table 8-8.

6 **Select process options.**

The connection file and database to which you are connected determine whether or not you can process the results to a database table.

See Table 8-10 for detailed information on process options.

7 **Select action options.**

For details on action options, see Table 8-11.

8 **Choose OK.**

9 **If you want to save your job parameters, select Save Job Parameters and enter a name.**

Job Parameter Options for BQY Jobs

This section provides details on the following BQY job parameter options:

- **Limit Options** – For both single-cycle and multiple-cycle BQY jobs
- **Processing Options** – For multiple-cycle BQY jobs only
- **Actions Options** – For multiple-cycle BQY jobs only

Limit Options

Limits in Hyperion Intelligence are a mechanism whereby you can selectively filter the amount of data that is processed and displayed when querying a relational or OLAP database.

Query limits which are created initially in Hyperion Designer can be either static or variable. The values of static limits can not be changed. The values of variable limits can be changed at run-time by using the Set Values page. The Set Values page displays different information for relational and OLAP databases.

The following topics detail the information displayed on the Set Values page when querying either relational or OLAP databases:

- Setting Limit Values When Using Relational Databases
- Setting Limit Values When Using OLAP Queries

Setting Limit Values When Using Relational Databases

The Set Values page shown in Figure 8-10 and Table 8-8 display the current values for limits above the Modify Limit field.

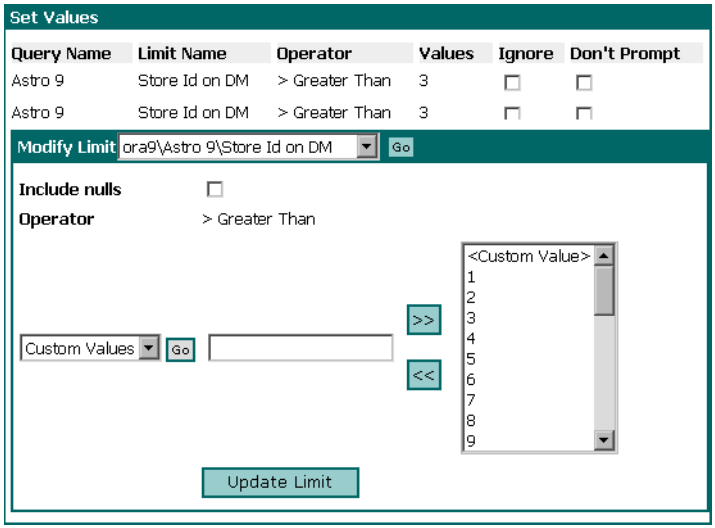


Figure 8-10 Limit Options for BQY Jobs

Table 8-8 Limit Options for BQY Jobs

Query Name	(Read-only) Name of the query from the BQY job.
Limit Name	(Read-only) Name of the field the limit is on from the BQY job.
Operator	(Read-only) The operator this limit uses, such as =, <, and >.
Value(s)	(Read-only) The values this limit uses. Variable system values such as $USER are also acceptable. The values are from the database the query is using.
Ignore	Disables this limit when processing the query.

Table 8-8 Limit Options for BQY Jobs *(Continued)*

Don't prompt	Disables prompting of the end-user for run-time values. A dynamic value such as a system variable can be used for value(s). This option essentially changes the variable limit to a static limit with fixed values.
Modify Limit	Select a limit from the drop-down list to modify.
Include nulls	Enables including an "is null" condition in the SQL sent to the database when the query is processed.
Operator	(Read-only) The operator this limit uses, such as =, <, and >.
Show values	Retrieves all available values associated with the item from the database. This allows you to consider and select from the actual range of values when applying a limit.
Custom values	Displays a list of available values saved with the limit or read from a file. This enables you to select values from a pre-defined pool. You can create and save a custom list with each limit.

Setting Limit Values When Using OLAP Queries

You can set OLAP variable limits and slicers when publishing or scheduling a job with an OLAP query.

In an OLAP query, you can apply limits in order to filter data on any cube Dimension Level that is to be displayed in the top labels or side labels of the OLAP query.

Slicers are limits on a dimension that are not present in either top or side labels but are visible in the data displayed. The Set Values page list of limits displays the slicers last.

Note When modifying limits, you cannot remove the last limit. You must have at least one limit value per limit.

The Figure 8-11 and Table 8-9 detail the variable limits and slicers of OLAP queries:

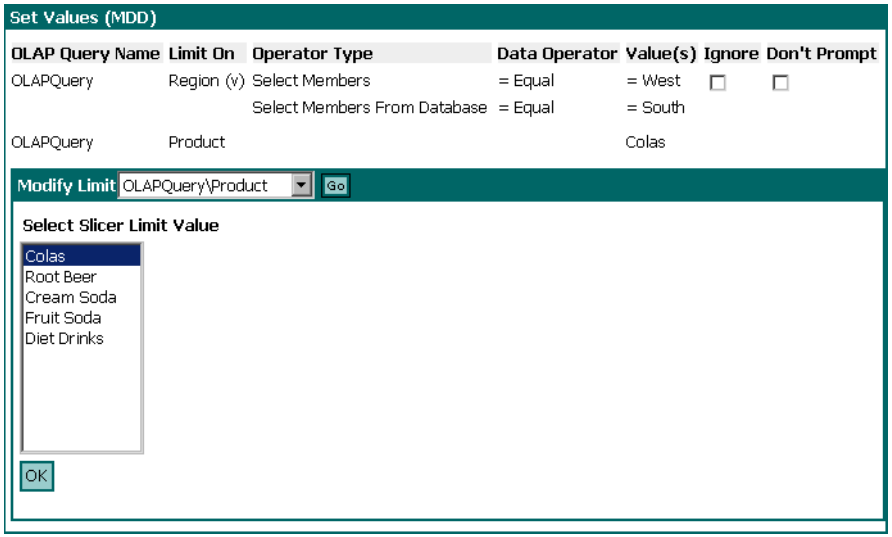


Figure 8-11 Limit Options for OLAP Queries

Table 8-9 Limit Options for OLAP Queries

OLAP Query Name	(Read-only) Name of the query from the BQY job.
Limit On	Depending on the database, you can choose from Top/Side labels, Slicers, Measures.
Operator Type	Depending on the database, options include: ■ Select Members From Database ■ Select By Measure ■ Top N ■ Bottom N ■ Top Sum ■ Bottom Sum ■ Top N% ■ Bottom N% ■ Select Members ■ User Defined Attributes ■ Substitution Variables Slicers have no operator types.
Data Operator	(Read-only) The operator this limit uses, such as =, <, and >. Slicers have no data operators.

Table 8-9 Limit Options for OLAP Queries

Value(s)	(Read-only) The values this limit uses. Variable system values such as $USER are also acceptable. The values are from the database the query is using.
Ignore	Disables this limit when processing the query.
Don't Prompt	Disables prompting of the end-user for run-time values. A dynamic value such as a system variable can be used for value(s). This option essentially changes the variable limit to a static limit with fixed values.

Process Options

The Process Options are shown in Figure 8-12 and displayed in Table 8-10. The connection file and database to which you are connected determines whether or not you can process the results to a database table. You must have Create and Insert privileges on the database in order to process to a database table.

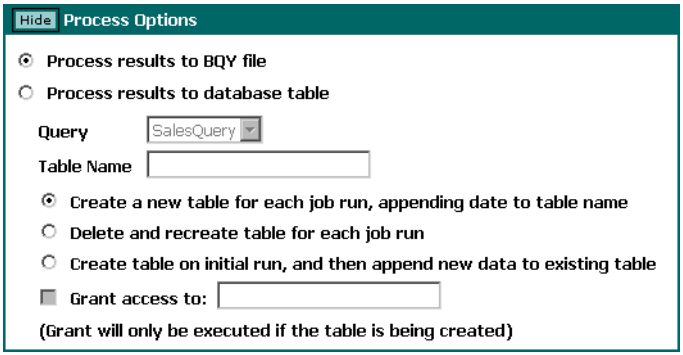


Figure 8-12 Process Options for Multiple-cycle BQY Jobs

Table 8-10 Process Options for BQY Cycles

Publish job output with the job	Publish the job output in the folder where the job resides.
Publish job output in another folder	Publish the job output to a folder you specify.
Process results to BQY file	Queries are processed to the Results section of the BQY file. Results from a query appear in the Results section.
Process results to database table	Creates a table in the database to store your data set. Items on the Request line become the column headings of the new table, and you can append new columns to the table and query it as needed. You need Create and Insert privileges on the database to process to a database table.
Query	Select the query you want to process to a database table.

Table 8-10 Process Options for BQY Cycles

Table Name	In the Table Name field, enter the name of the new table you want to create, or type the name of an existing table to which you want to append columns. See your database administrator if you want to use a new table.
Create a new table for each run, appending date to table name	Creates a new table for each run of the job and appends the date to the table name.
Delete and recreate table for each job run	Deletes the old table and creates a new table for each run of the job using the same table name.
Create table on initial run, and then append new data to existing table	Creates a table on the initial run and then adds new data to the existing table.
Grant access to:	Enter database user names (separated by commas) for each additional user who can access the table and choose **OK**. Only a user with Grant privileges can use the Grant Access to field. If *Grant Access to* is not selected, the table will be granted only to your own user ID. (This refers to database user names.)

Action Options for Multiple-Cycle BQY Jobs

The Action Options are shown in Figure 8-13 and displayed in Table 8-11. The action is the output method. The options on the actions page vary depending on the action chosen:

- **Export** – Applies to Dashboard, Report, Results, Chart, Pivot, OLAPQuery, and entire document as web page.
- **Save document** – Applies to the entire BQY file.
- **Email section** – Applies to Dashboard, Report, Results, Chart, Pivot, and OLAPQuery.
- **Email document** – Applies to the entire BQY file.
- **Print** – Applies to Dashboard, Report, Results, Chart, Pivot, and OLAPQuery.

Note The print option is available only if the administrator has defined a printer for the Hyperion Foundation system.

Note A cycle can have only one Save As Job Output action. It can have multiple save actions, but it can only be saved as a file on some output folders.

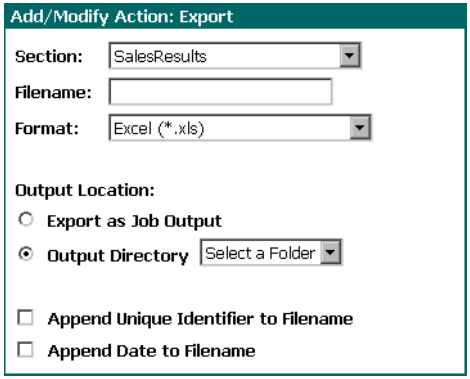


Figure 8-13 Example Action Page: Export

Example: Publishing and Scheduling a BQY Job

Table 8-11 Action Options

Section	Select the section to be saved, printed, mailed or exported.
Filename	Enter a name for the export file (no extension).
Format	Select the format of the exported file (the selection presented depends upon the type of section you are exporting and the type of export action): ■ Excel (*.xls) ■ HTML (*.htm) ■ Lotus 1-2-3 (*.wks) ■ Text (Tab Delimited)(*.txt) ■ Text (Comma Delimited)(*.csv) ■ Adobe Acrobat (*.pdf) ■ Graphics file (*.jpg)
Export as job output	Select to export section to the current job folder in the Repository. (Currently the filename is not used with this option.)
Save as job output	Select to save section to the current job folder in the Repository. (Currently the filename is not used with this option.)
Output Directory	Select the directory where the export file or BQY document is saved.
Append Unique Identifier to Filename	Appends both the job ID# and the name of the job's report cycle to the saved BQY document or export file. This ensures that the file is recognizable if similar files are saved to the same directory.
Append Date to Filename	Appends the current date (year, month and date) to the saved document or exported file to indicate when it was processed.
Save Results with Document	Saves data contents of the Results section with the saved or emailed document.
Save Computed Values with Document	Saves the computed values with the document.
Save in Compressed Format	Saves the saved BQY file using the BQY compressed file format.

Table 8-11 Action Options *(Continued)*

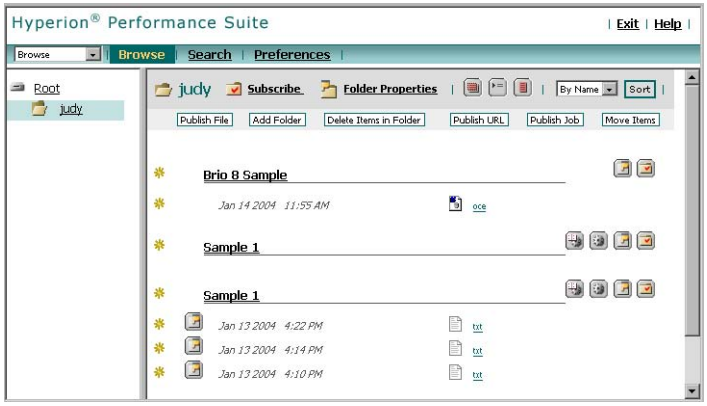
Send Files	Toggles inclusion of the scheduled file in an email message.
Send Results	Includes the data contents of the Results section with the saved or emailed document.
Send Computed Values	Includes the computed values when sending the saved or emailed document.
Send Compressed	Sends the saved BQY file in BQY compressed file format.
Additional Message	Email message text.

The example in this section illustrates the process of publishing and scheduling a BQY job. In this example, you publish and schedule sample1.bqy to run once a quarter.

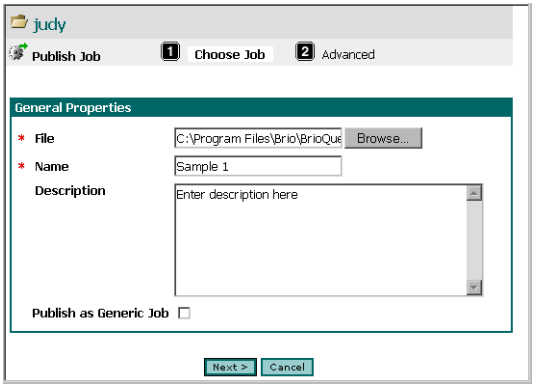
To publish sample1.bqy:

1 **Navigate to the folder in which you want to publish this job.**

2 **Choose Publish Job from the action menu.**



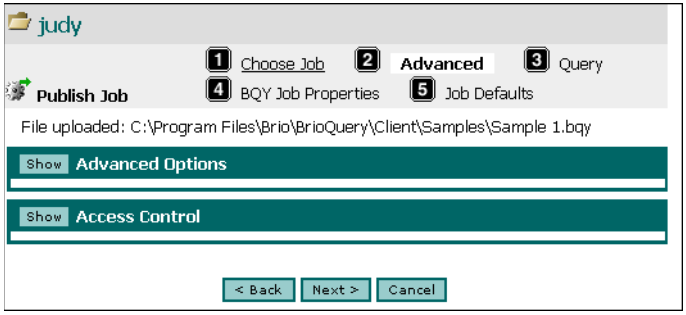
3 **Browse for the job, enter a description, and choose Next.**



The Advanced page opens.

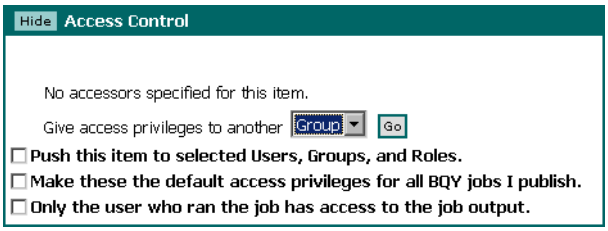
4 **Choose Show to open the access control section on the Advance page.**

In this example we are not changing any of the advanced options so we do not need to open that section.

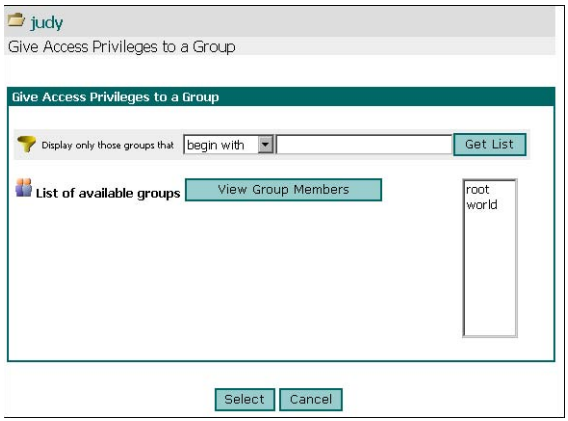


5 **Give the world group access to sample1.bqy.**

a. Select group from the drop-down list and choose **Go**.

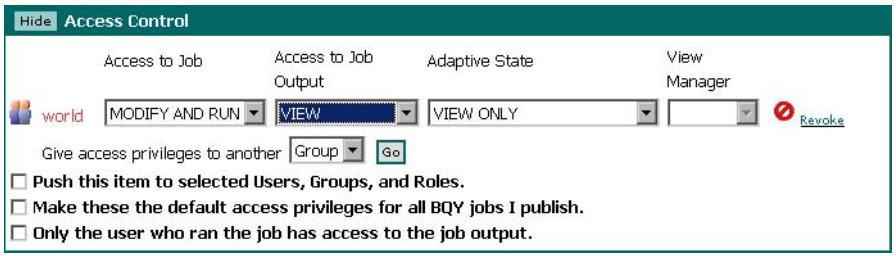


b. Select world from the listbox and choose **Select**.



c. Select the access control level for the job and for the job output, and set the adaptive state.

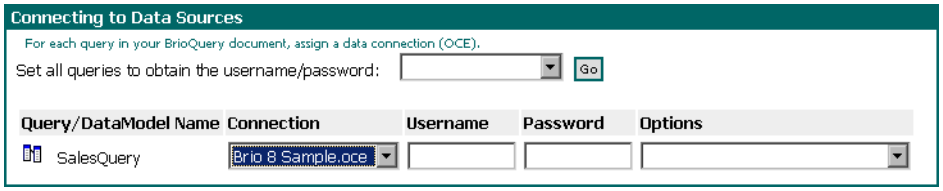
- **Job access** - Modify and Run
- **Job output access** - View
- **Adaptive state** - View only



d. Choose **Next**.

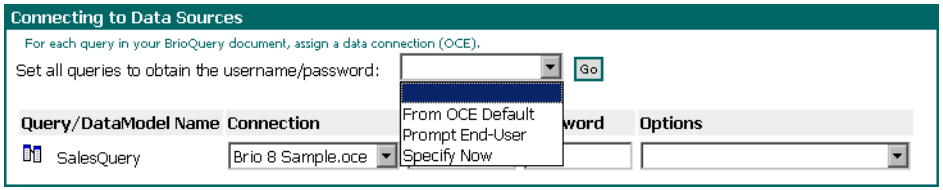
The Query Page appears.

6 **Under Connecting to Data Sources, select Brio 8 Sample from the Connection drop-down list.**



7 **Select From OCE Default from the *Set all queries to obtain the username/password* drop-down list and choose Go.**

The username and password fields populate with the OCE default username and password.

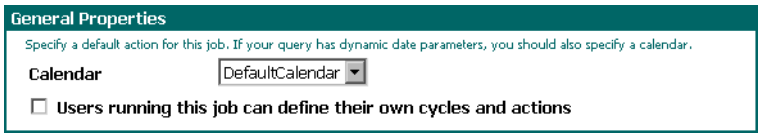


8 **Choose Next.**

The BQY Job Properties page appears.

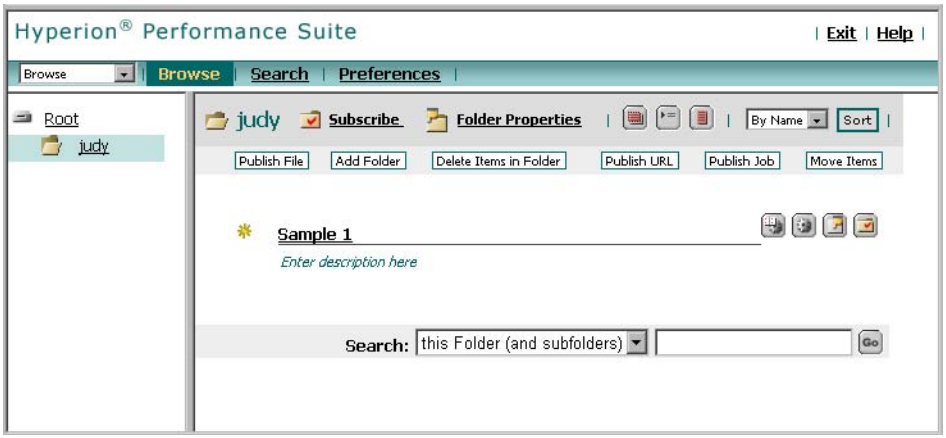
9 **Under General Properties, select *Users running this job can define their own cycles and actions*.**

Enabling this field makes this job a multiple cycle job. When users cannot define cycles and actions the job is a single cycle job.



10 **Scroll down and choose Finish.**

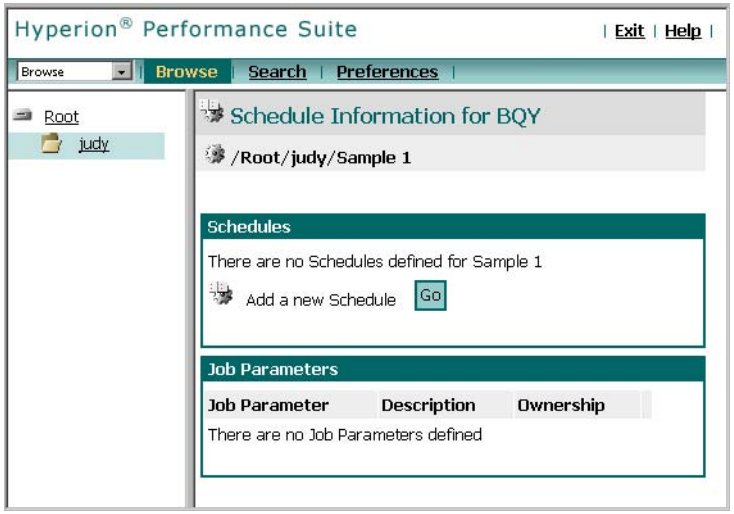
You have just finished publishing Sample1.bqy. Check the item list of the folder in which you published this job.



To schedule sample1.bqy job:

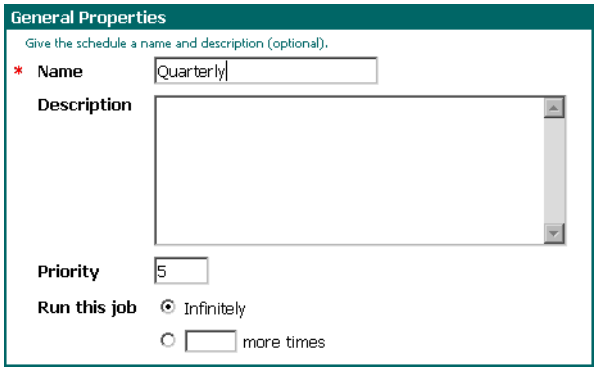
1 **Navigate to sample1.bqy and choose the Schedule button.**

2 **Choose Go to add a new schedule.**



The Choose Job page appears.

3 Under General Properties, enter Quarterly for the name of this schedule and choose **Next**.



4 On the Select Job Parameters page, choose **Next**.

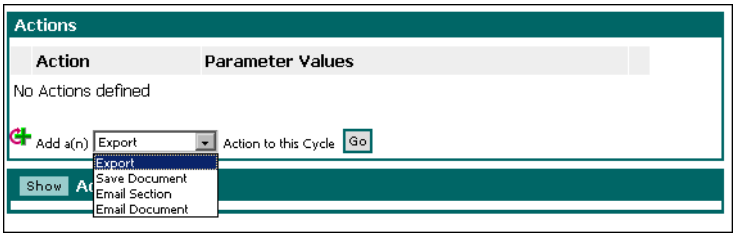
The Set Values page appears.

5 Choose **Go** next to *Add another cycle to this job:* to define a new cycle.

The Add/Modify Cycle page appears.

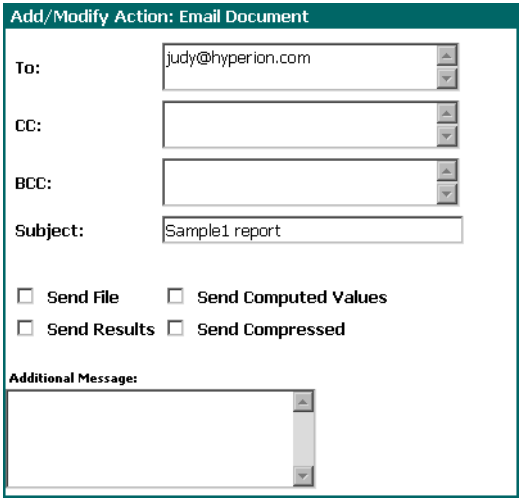
6 Under Define Cycles, enter Email in the **Cycle Name:** field.

7 Under Actions, select **Email Document** from the drop-down list and choose **Go**.



The Add/Modify Action page appears.

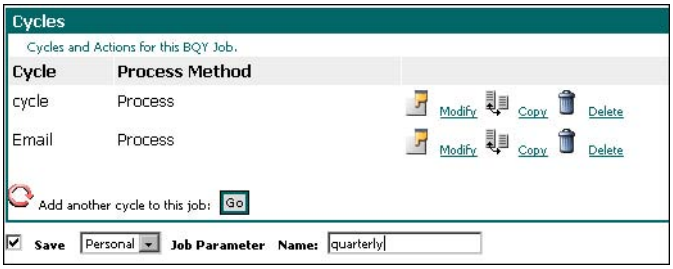
8 Enter your email information and choose **OK**.



9 On the Add/Modify Cycle page, choose **OK**.

10 Select **Save Personal Job Parameters** and enter a name in the **Name** field.

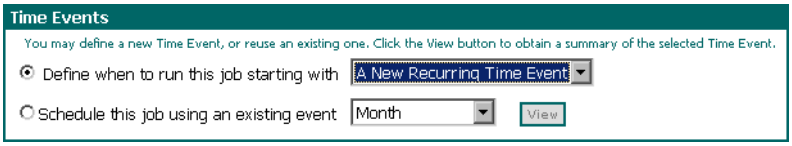
This saves the cycle as a job parameter so you can modify it later.



11 Choose **Next**.

The When to Run page appears.

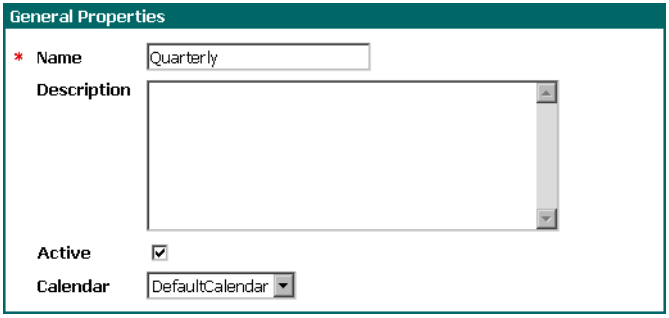
12 From the *Define when to run this job starting with* drop-down list, select A New Recurring Time Event.



13 Choose **Next**.

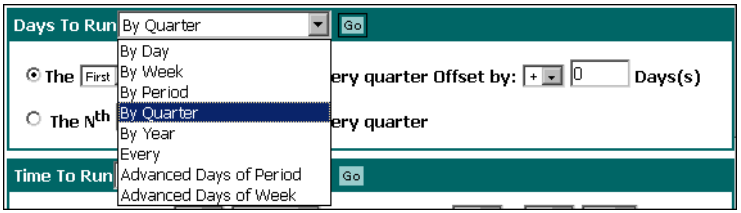
The Manage Events page appears.

14 Under General Properties, enter the event name.



15 Select By Quarter from the Days to Run drop-down list and choose **Go**.

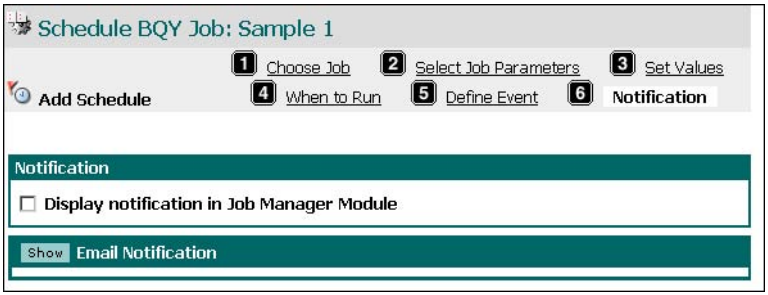
This gives you the default values for running your job every quarter.



16 Choose **Next**.

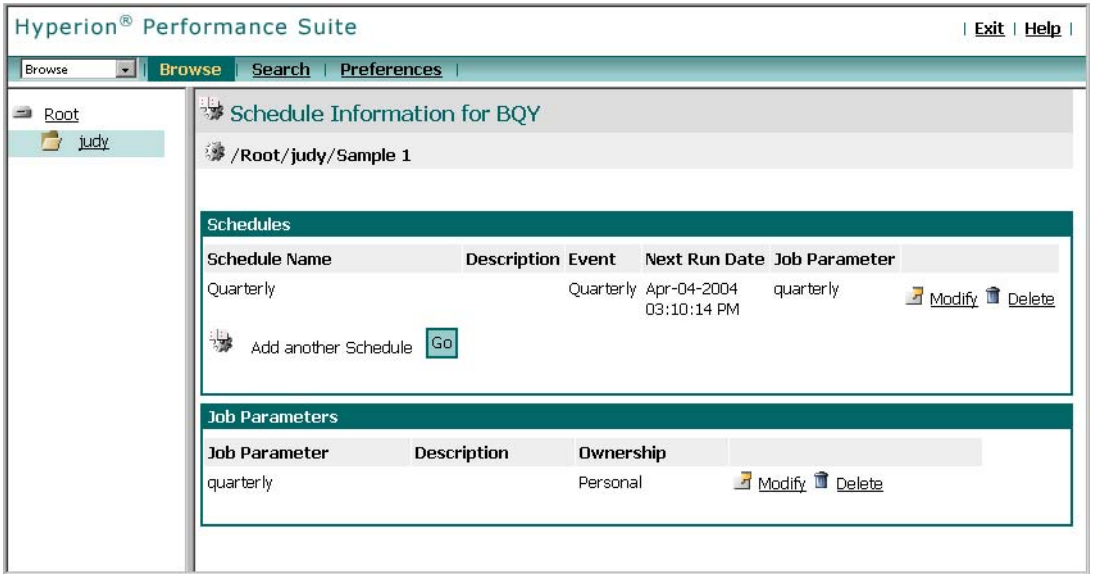
The Notification page appears.

17 Select *Display notification in Job Manager Module*.



18 Choose **Finish**.

The Schedule Information for BQY screen appears.



Your job, Sample 1, is now published and scheduled to run.

Summary

In this chapter you have learned how to publish and schedule BQY jobs. You can also use this chapter as a reference for publishing and scheduling properties of BQY jobs.

9 SQR and Generic Jobs

SQR jobs are created with SQR Developer. Generic jobs are created using other applications that have a command line interface. You can publish, execute or run, and schedule SQR and generic jobs using the Browse and Job Manager modules. In addition, you use properties and parameters to further define both SQR and generic job options. This chapter explains the properties specific to SQR jobs, generic jobs, and SPF files (SQR job output).

For basic publishing procedures, see Chapter 6, "General Publishing". For basic job execution and scheduling procedures, see Chapter 7, "Managing Jobs".

Note In Windows, if you are running a pre-8.x SQR job and have multiple versions of SQR installed on your machine, you will need to add the SQRDIR entry into the SQR.ini file. The default locations of the SQR.ini file are C:\Program Files\Brio\SQR*Database type* and/or C:\Program Files\Hyperion\SQR*Database type*.

In This Chapter

SQR Job Publishing Prerequisites 9-2
SQR Job Properties 9-2
Generic Job Properties 9-26
Modifying SQR and Generic Job Properties 9-30
Setting SQR and Generic Job Parameters 9-31
Job Output Options when Scheduling SQR jobs 9-33
Working with Secure SQR Jobs 9-35

SQR Job Publishing Prerequisites

You need to have the following information before publishing an SQR job:

- Database connectivity, database type, and version of SQR needed to run the SQR program that you are adding (choose from the provided drop-down list). Example: Marketing/SQR v.8.0.
- Files that the SQR program references when executed:
  - Include files (#include commands)
  - Input data files (Open for-reading commands)
  - Image files (print-image and declare-image commands).
- Compile-time parameters (ASK commands) and Run-time parameters (INPUT commands).
- For secure SQR jobs: The security organization of the program, that is, which users have access to which data and, accordingly, how the output should be "bursted," or divided.

SQR Job Properties

The properties explained in this section pertain only to SQR and generic jobs. The properties that do not apply to generic jobs are noted. See "Generic Job Properties" on page 9-26 for additional properties unique to generic jobs.

SQR jobs have the following properties:

- General Properties
- Advanced Options
- Connectivity and Run Options
- Parameters
- Output

Many of the General properties and the common Advanced options for SQR and generic jobs are the same as they are for other items such as BQY jobs. See "Common Properties" on page 6-14 for details on these properties. In this section, only the properties unique to SQR and generic jobs are included.

Analyzing Your SQR Program

When publishing an SQR job, the system can analyze your SQR program for dependencies. This analysis occurs if you request the system to scan for required files and INPUT/ASK parameters. This could take some time if your SQR program is large.

The system examines the following commands in your SQR program:

- **INCLUDE** – Includes an external source file into the SQR report specification; for example, an SQR code file, `charts.sqi`, required by `stocks.sqr` when it compiles.
- **OPEN** – Opens an operating system file for reading or writing. For example, the following OPEN statement opens the file for sequential reading of the data in the file, which is identified to the SQR program as '1':

  ```
  open 'stocks.dat'as 1 for-reading record=100
  ```

- **DECLARE-IMAGE** – Declares the type, size, and source of an image to be printed. For example:

  ```
  declare-image control flow
     type = eps-file
     source = 'controlf.eps'
     image-size = (321, 309)
  end-declare
  ```

- **PRINT-IMAGE** – Prints an image in any section of the report. As with the declare-image command, the print-image command takes type, size, and source arguments.
- **ASK** – Retrieves a compile-time substitution variable. The retrieval may be by user input, command-line arguments, or as entries in the @file on the command line.
- **INPUT** – Retrieves a run-time variable. May receive its values by user input, command-line arguments, or as entries in the @file on the command line.
- **PRINT URL=”...”** – Prints the file found at the URL location, usually an image file. The file is added to the list of required files for the job.
- **SECURE** – Retrieves the secure tag.

General Properties

The ability to retrieve the source file is the only unique property for SQR jobs on the general properties page. All other general properties are explained in "Common Properties" on page 6-14.

Figure 9-2 and Table 9-1 show the general properties page for SQR jobs.

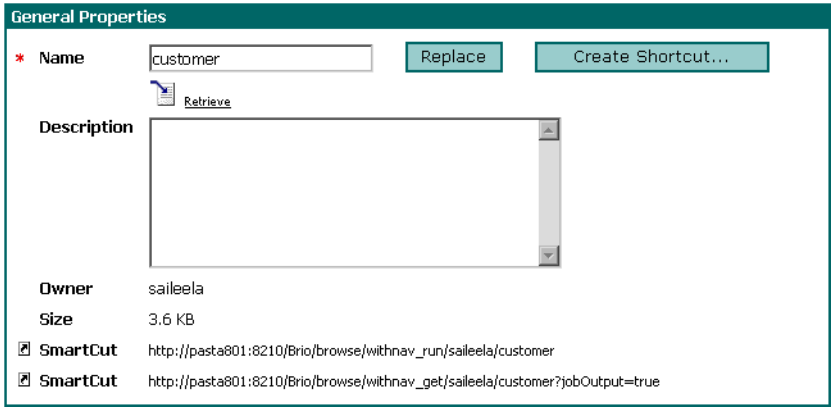


Figure 9-1 General Properties Page

Table 9-1 General Properties

Retrieve	Provides access to the SQR program source file. You can use this to view or modify the program.

Advanced Options

The Security Tags Included property is the only unique property for SQR jobs on the advanced options page. All other advanced options are explained in "Common Advanced Options" on page 6-16.

Table 9-2 shows the advanced options for SQR jobs.

Table 9-2 Advanced Options

Security Tags Included	(Read only) Indicates whether the job is secure or not. (SQR jobs only.) Secure jobs can only have HTML output.

Connectivity and Run Options

This section includes all data source connection properties and run properties for SQR jobs:

- Connection and Run Options
- Required Files
- Add Required Files
- Advanced SQR Options

Connection and Run Options

Use these options to set up or change the database connections and the SQR engine for the job. These options apply only to SQR jobs.

Figure 9-2 and Table 9-3 show the connection and run options for SQR jobs.

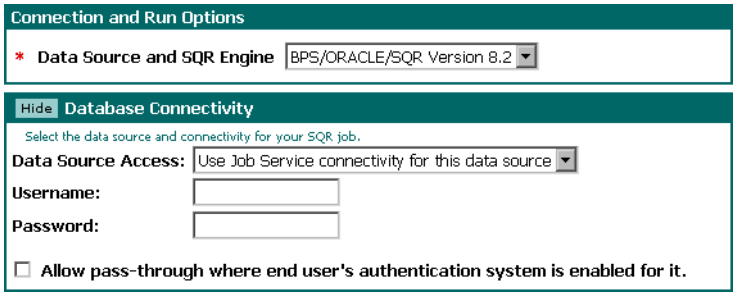


Figure 9-2 Connection and Run Options

Table 9-3 Connection and Run Options

Data Source and SQR Engine	Select a data source and an SQR engine from the drop-down list. If the data source or SQR engine you need is not available, see your administrator.
Use the default connectivity for this data source	Select to use the default username and password for this data source.
Prompt for database username and password at run-time	Select to prompt the user to enter a valid username and password at run-time.
Set username and password to run this job	Select to set the username and password now at publishing time.
Allow pass-through where end user's authentication system is enabled for it	Enable to allow access to this job's data sources without additional credentials.

Required Files

You can identify and locate required files by scanning the SQR program or by manually entering the required files. As you identify and locate required files, they are added to the required files screen. For generic jobs, you must manually enter required files.

Required Files are files associated with a job or SPF file and are required for a successful execution. They can be one of the following:

- For SQR jobs, Include/Data/Image files and INI file.
- For generic jobs, associated files used for running the job.
- SPF files and associated files used in viewing the SPF file.

Here we will concentrate on required files managed through a listing interface, namely those for SQR/generic jobs and SPF files. The INI file and custom form required files are managed through a different interface.

Note You should scan for required files before manually entering required files because the new scanned results will replace the required files list. If duplicate required files are listed, you must make sure to delete the extra files.

Figure 9-3 shows the Required Files page.

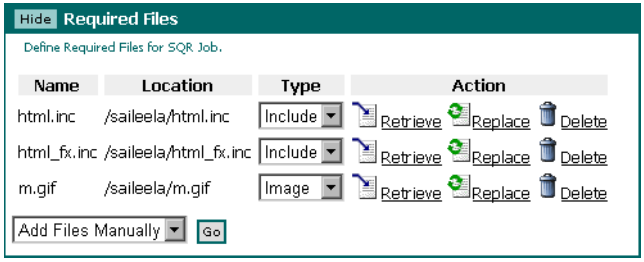


Figure 9-3 Required Files

Table 9-4 explains the properties on the Required Files page.

Table 9-4 Required Files

Name	Name of the required file. The Local File icon next to the name indicates that the file is located on your local system.
Location	Path of required file. If the location is not listed, you must either find the file by selecting Modify or delete the file.
Type	Displays the correct type (INCLUDE, IMAGE, DATA) based on what the system determines. For manually entered files, JPEG, GIF, and HTML files are given the IMAGE type. You must select a type for other manually entered files. All files must have a type before you can continue the publishing process.
Action	**Retrieve** – Select the link to open the file. You can retrieve any type of required file including image files and data files. **Replace** – Select the link to replace the file. You can choose a file either from your local computer or from the Hyperion Foundation Repository to replace this file. **Delete** – Select the link to delete the file. **Modify** – Select the link to browse for files that the system could not locate. This allows you to locate the missing file on your local system.

Table 9-4 Required Files

Add Files Manually	Default method to locate the required files for a job. You can either enter each required file separately and/or zip the required files and enter the zip file manually. Hyperion Foundation extracts the zipped files and adds them to the required files summary list.
Scan Folders Specified in Preferences	The SQR program scans for required files in the folders listed in preferences, see "Setting a Default Scanning Folder for SQR Jobs" on page 3-19. Files not located are listed on the summary screen with the File not found message under location. Locate the missing files by selecting Modify.
Scan All of HPS	The SQR program is scanned for required files and the files that are located in the Hyperion Foundation Repository are located and listed on the required files summary list. If your program uses variables for file names in the OPEN, DECLARE-IMAGE, or PRINT-IMAGE commands, you will get a warning message that the system is unable to find the files unless you provide the file names. Ignore the message, if you are going to enter the required files manually or the variables point to files that reside on the Job Service host using a full path, Otherwise you should exit the publishing process and modify your SQR program.

Add Required Files

Browse your local system or the repository for the required file you want to manually add.

Figure 9-4 shows the required files page.

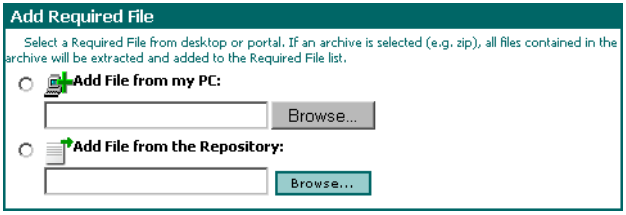


Figure 9-4 Add Required File

Advanced SQR Options

Advanced SQR options only apply to SQR jobs. For more information on the command line flags and the SQR.ini file, see the *Hyperion SQR Language Reference* manual.

Figure 9-5 and Table 9-5 show the advanced SQR options.

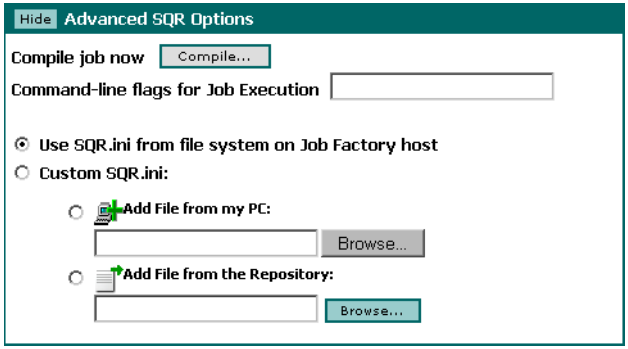


Figure 9-5 Advanced SQR Options

Table 9-5 Advanced SQR Options

Compile job now	Choose this button to compile the program. Benefits to compiling your program now include: ■ Saving compiled version of your program to save time when later when running the job. ■ Validating SQL ASK parameters. ■ Checking validity of your SQR program.
Command line flags for Job Execution	Enter optional command line flags in the text box. Some flags can be over-ridden by job output option formats and demand paging options, for example, -burst and -printer.xx where xx is a format type. The following command line flag option is not available here: -EH_CSVONLY. The system allows up to 250 characters on the command line.
Use SQR.ini from File System on Job Service Host	Default SQR.ini file location.
Custom SQR.ini	Select to enter the path to a custom SQR.ini file. Browse for the file on your local machine or in the repository.

Parameters

SQR jobs have two types of parameters, ASK and INPUT. ASK parameters (variables) are used at compile time. INPUT parameters (variables) are used when the job is executed and appear as prompts when the user runs the job. You can add ASK and INPUT parameters to the parameter list. Only SQR jobs have ASK parameters. Both SQR and generic jobs can have INPUT parameters. Further define each parameter by selecting the Modify button for that parameter. Also select custom forms for user input of the parameters.

Define Parameters

Figure 9-6 shows the initial Define Parameters page. Figure 9-7 shows the Define parameters screen either after scanning or after manually entering some parameters. Table 9-6 details the define parameter properties.

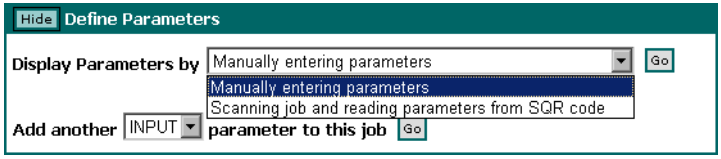


Figure 9-6 Define Parameters

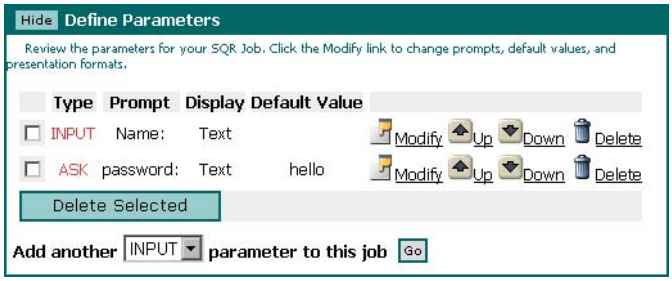


Figure 9-7 Define Parameters with Parameters List

Table 9-6 Define Parameters

Manually entering parameters	Default method for entering ASK and INPUT parameters. Parameters are listed on this screen as you add them.
Scanning job and reading parameters from the SQR code	If you select this method, the system scans the SQR job and the INPUT and ASK parameters list automatically on this screen.
Add another parameter to this job	Select either INPUT or ASK and click GO.
Type	The Type is either INPUT or ASK.

Table 9-6 Define Parameters

Prompt	The prompt the user sees when prompted for values for this parameter.
Display	The display format (Text, SQL Choice, Choice Box) for this parameter. Default is Text.
Default Value	The default value for the parameter.
Modify	Select to modify the following properties for each parameter: prompt, display format, and default value.
Arrow icons	Use the arrows to re-order the parameters. The parameters are processed in the order they appear on this list.
Garbage can icon	Select to delete the parameter.

Modify ASK Parameters

ASK parameters can be entered either as text entry or as an SQL query. Figure 9-8 shows the properties for text entry ASK parameters.

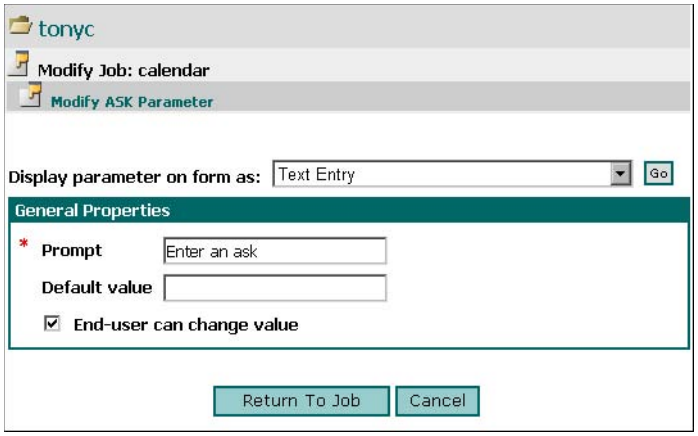


Figure 9-8 ASK Parameter Text Entry

Figure 9-9shows the properties for ASK parameters SQL query.

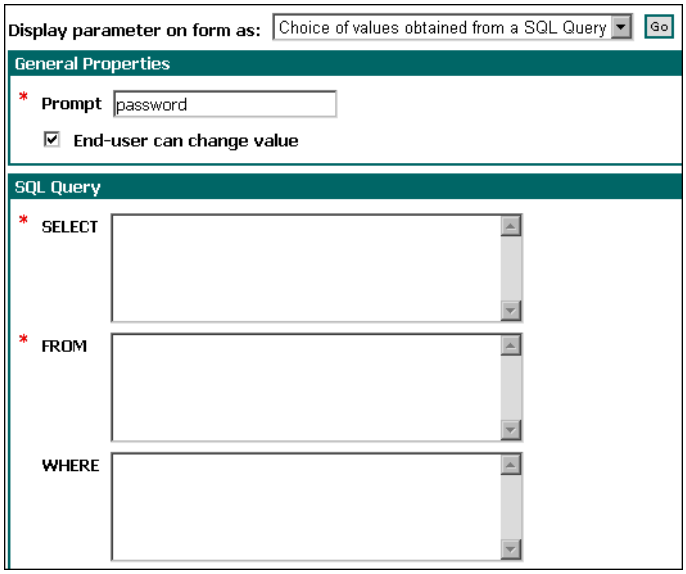


Figure 9-9 ASK Parameter SQL Query

Table 9-7 explains the ASK parameter properties.

Table 9-7 ASK Parameter Properties

Display parameter on form as:	(Both)Select if you want this parameter to display as Text Entry or as Choice of Values from SQL Query.
Prompt	(Both) Enter the prompt for this parameter.
Default value	(Text entry) Enter a default value or allow the end-user to change the value. The system requires a default value or that *End-user can change value* is enabled.
End-user can change value	(Both) Enabled this allows the end-user to enter a default value during run time.

Modify INPUT Parameters

INPUT parameters can be entered as a text entry, as pre-determined values, or as an SQL query. Figure 9-10 shows the properties for text entry INPUT parameters.

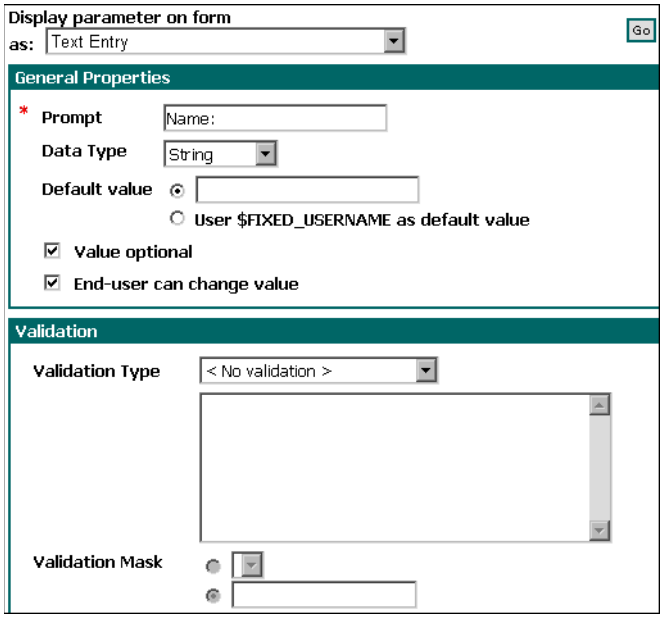


Figure 9-10 INPUT Parameter Text Entry

Figure 9-11 shows the properties for pre-determined values INPUT parameters.

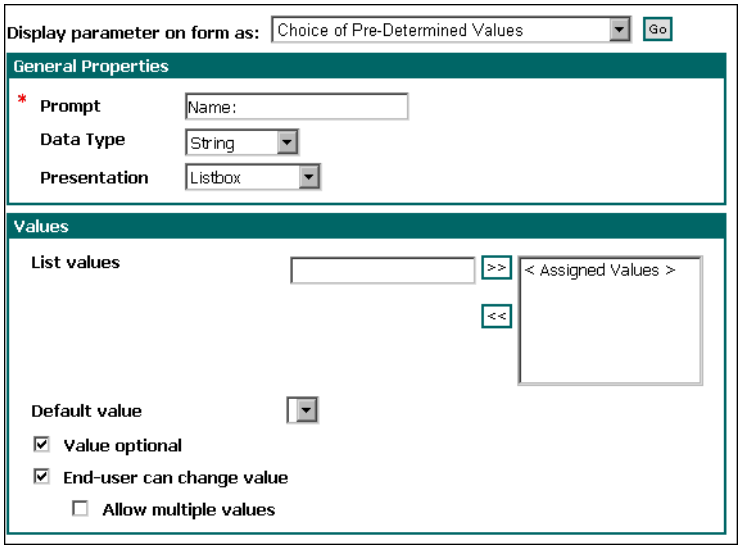


Figure 9-11 INPUT Parameters Pre-determined Values

Figure 9-12 shows the properties for SQL query INPUT parameters.

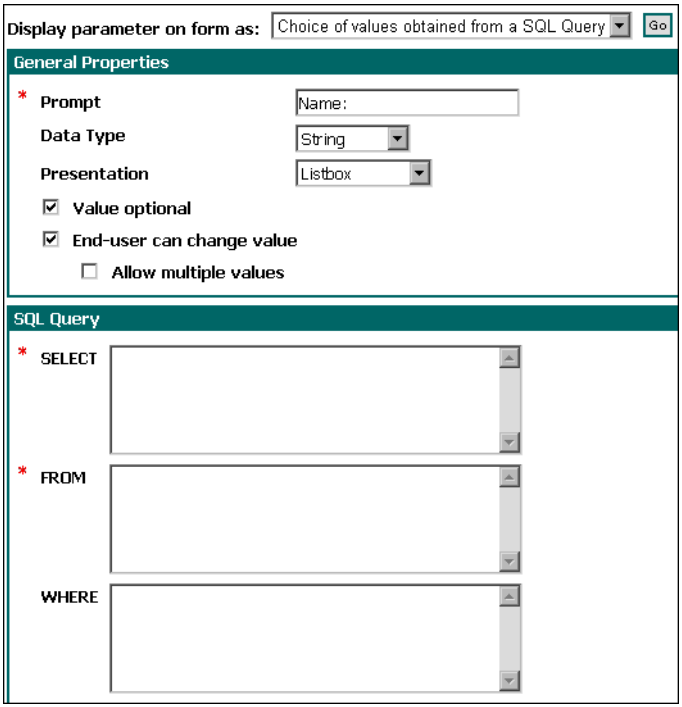


Figure 9-12 INPUT Parameters SQL Query

Table 9-8 explains the INPUT parameter properties.

Table 9-8 INPUT Parameter Properties

Display parameter on form as:	(All)Select if you want this parameter to display as Text Entry, as Choice of Pre-determined Values, or as Choice of Values from SQL Query.
Prompt	(All) Enter the prompt for this parameter.
Data Type	(All) Select the data type, (text, numeric, or date) from the drop-down list. (Default is text)
Presentation	(Pre-determined and SQL Query) Select the presentation format from the drop-down list: drop-down, radio buttons, or listbox.
Default value	(Pre-determined and Text entry) Enter a default value or allow the end-user to change the value. If *Value optional* is disabled, the system requires a default value or requires that the *End-user can change value* is enabled. When $FIXED_USERNAME is enabled, *Value optional* and *End-user can change value* are disabled.
Value optional	(All) Enable to allow this parameter to have no default value. This option allows the user to execute a job with no value for this parameter.

Table 9-8 INPUT Parameter Properties

End-user can change value	(All) Enable to allow the end-user to enter a default value during run time. If no default value is specified at this time and this is enabled, the end-user must specify a default value. (Pre-determined and SQL Query) When this is enabled the allow multiple values field is enabled.
Allow multiple values	Available for listbox presentation only. If the multiple values selected are being used to create dynamic selection criteria within the SQR program, the SQR program must be designed to construct the appropriate WHERE clause.
Validation Type	(Text) Select the validation type from the drop-down list.
Validation Mask	(Text) Select either a standard validation mask or a custom validation mask.
List Values	(Pre-determined) Enter values individually in the textbox and move them over to the listbox using the right-facing arrows. Delete values by selecting them in the listbox and selecting the left-facing arrows.
SELECT/FROM/WHERE	(SQL Query) Enter SQL commands to retrieve the parameter list.

Custom Form

You can select a custom HTML parameter form or use the default form for INPUT parameter intake when the job is run. Parameter forms can be simple or complex. A parameter form can consist of a simple HTML page that contains a form, or it can be a complex HTML page that invokes JavaScript or an applet. The form that you select can be a customized web parameter collection form developed by your company.

When you assign a form the Browse module stores it in the Repository. You can assign a form from your local system, one that is already in the Repository, or the provided default form.

For more information about parameter forms, see Chapter 10, "SQR Custom Parameter Forms."

Figure 9-13 and Table 9-9 show the custom form properties.

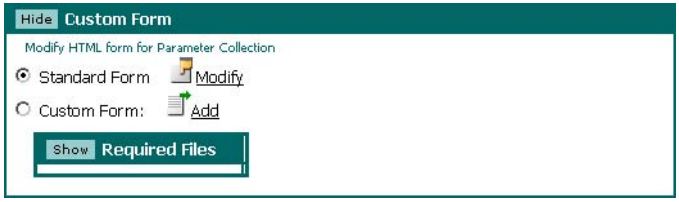


Figure 9-13 Custom Form

Table 9-9 Custom Form

Standard Form	This is the default HTML parameter form.
Custom Form	Choose **Add** next to Custom Form to upload the custom form file. Browse to the custom form file on your local system or the Repository. After you add a custom form, Add is replaced with the custom form file path and Replace. If the file you selected is not an HTML file, the system asks you to select another file.
Replace	Select to replace the current custom form file. Browse to the new form file on your local system or in the Repository.

Table 9-9 Custom Form

Modify	Appears only when modifying the properties. Choose **Modify** to change the content of your custom form. Your session may time out while you are changing the form. Log back in and add the modified form using Modify. For details on modifying parameter forms, see Chapter 10, “SQR Custom Parameter Forms”.
Required Files	Add supporting files, such as GIF images, used by the form. You can specify required files only after selecting a custom form file.
Name	Name of the required file. The icon next to the name indicates that the file is located on your local system.
Location	Path of required file.
Action	**Replace** - Select the first action icon to replace the file. You can choose a file either from your local system or the Repository. **Delete** - Select the second action icon to delete the file.
Add Files Manually	Choose **Go** to add required files manually.

Parameter List Options

Figure 9-14 and Table 9-8 details the INPUT parameter list options.

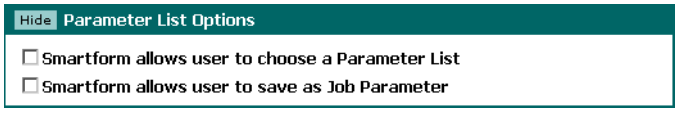


Figure 9-14 Parameter List Options

Table 9-10 Parameter List Options

Smartform allows user to choose a Parameter list	Select to allow users to choose from a selection of defined parameter lists at runtime.
Smartform allows user to save this set of parameters as “My Defaults”	Select to allow users to save a parameter list for the values entered in the input fields.

Output

HTML format is always selected for an output format. You can add additional output formats by selecting them or listing them in the textbox.

Output Options

Figure 9-15 and Table 9-11 details the output options.

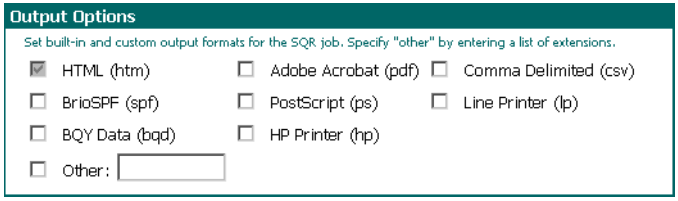


Figure 9-15 Output Options

Table 9-11 Output Options

Choose Output Options for SQR Job	Select the output formats you want generated from your SQR program. Options include: .lp (line printer), .ps (postscript), .csv (comma-separated value), .pdf (Portable Document Format), .bqd (used with BQY files), .hp (HP printer), and .spf (printer-independent file format created by the SQR server) files. Values entered in *other* are stored as a custom property. Output formats selected here override all other output formats specified in any other SQR Command-Line Option interface. Only HTML is available for Secure SQR jobs. Note: The selected/unselected SPF output checkbox only shows/hides SPF output from the output listing. However, SPF output is always generated.

Demand Paging

Demand paging offers options for splitting, or "bursting", the report into separate files for better performance. By bursting a report, you avoid downloading it in its entirety into the browser.

For secure SQR jobs, it is important to choose an HTML Demand Paging option according to how the report divides the output among users or groups.

Demand paging is for HTML output only.

Figure 9-16 and Table 9-12 detail the demand paging options.

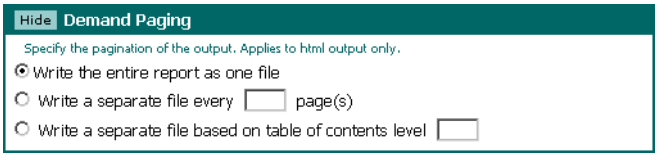


Figure 9-16 Demand Paging

Table 9-12 Demand Paging

Write the entire report as one file	Writes the complete report output to a single HTML file. (Not available for a secure SQR job.)
Write a separate file every __ pages	Creates a separate HTML file for every n pages. For example, if you enter 1, a separate HTML file is created for every page of the report, while if you enter 20, a separate HTML file is created for every 20 pages. The number of pages is optional. If you don't enter a number, a separate HTML file is created for every page in the report.
Write a separate file based on table of contents level	Creates a separate HTML file for every entry in the table of contents. For example, if you enter 1, a separate HTML file is created for the top level (level 1) in the table of contents. If you enter 2, a separate HTML file is created for every entry of level 2 or 1. The entry level number is optional, with a default value of 1. That is, If you don't enter a number, a separate HTML file is created for every top level in the table of contents. If there is no table of contents, the report is saved as a single HTML file.

Advanced

Figure 9-17 and Table 9-13 detail the advanced output properties.

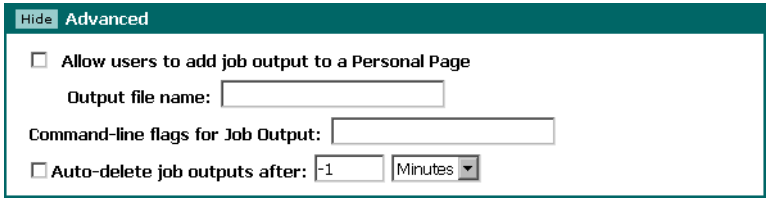


Figure 9-17 Advanced SQR Output Options

Table 9-13 Advanced SQR Output Options

Allow users to add job output to a Personal Page	Select to allow users to embed the contents of job output in Personal Pages. Only HTML output can be displayed on Personal Pages.
Command-line flags for Job Output	Specify other command line flags used in output bursting.
Auto delete job is run	Enable to automatically delete job output. Indicate when to delete by entering a number and selecting a time frame (minutes, hours, days, weeks, years) after the job is run. Default is days.

Compile Properties

You can compile your SQR program now or before you run it. All pre-compile programs re-compile if any INCLUDE file is modified.

Figure 9-18 and Table 9-14 explain the compile properties.

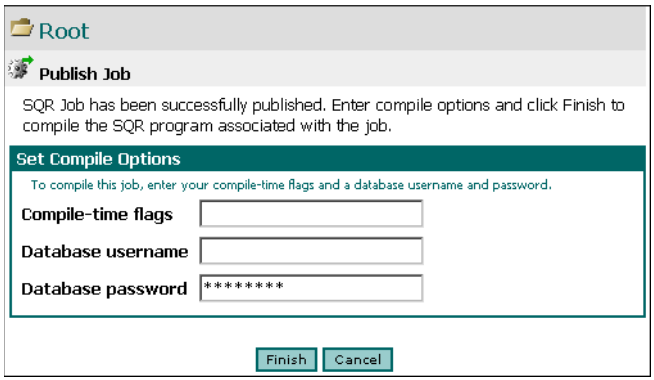


Figure 9-18 Set Compile Options Page

Table 9-14 Compile Properties

Compile-Time Flags	Enter the command-line flags that can be used at compile time.
Database Username	A valid user name to access the database.
Database Password	A valid password for the database user name you specified.
ASK parameters	If your SQR job requires ASK parameters, their default values appear. To modify the default values for the ASK parameters required by the SQR job, select the ASK parameter, modify the default value in the Value field, and apply changes.

SPF File Properties

SPF file properties are a subset of SQR job properties. An SQR Portable File (SPF) is a printer-independent file format that allows for all the SQR graphical features, including fonts, lines, boxes, shaded areas, charts, bar codes, and images. SQR portable files have a default extension of SPF or SNN (for multiple reports).This file format is very useful for saving the output of a report. SPF files can be distributed electronically in addition to being read with the SQR Viewer. Producing SPF output also allows you to decide later where to print it.

Generic Job Properties

Most generic job properties are the same as SQR job properties. The General properties, the Advanced options, and the Parameter properties are the same except where noted in the SQR Job Properties section. (see "SQR Job Properties" on page 9-2).

The Job Input/Output properties are unique to generic jobs and are explained below.

Define Job Options

If the application that you need to run your program is not available, see your administrator to configure a Job Service with the application you need.

Figure 9-19 and Table 9-15 shows the output options for generic jobs.

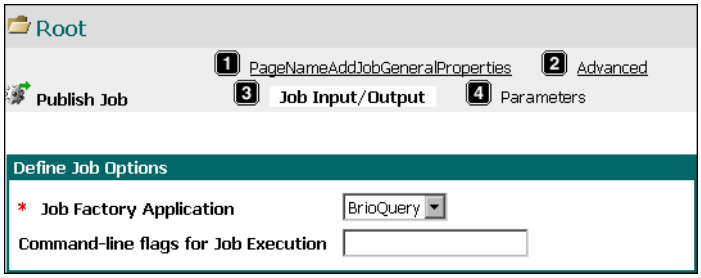


Figure 9-19 Generic Job Options

Table 9-15 Generic Job Options

Job Service Application	Select the application that will be used to run your program. If the application your program requires is not on the list, a new or existing Job Service must be configured for the application *before* proceeding with the setup of this job.
Command -line flags for Job Execution	Enter the command-line flags that will be passed to the application.

Required Files

Identify and locate required files by manually entering the required files. As you identify and locate required files they are added to the required files screen.

Figure 9-20 and Table 9-16 shows the required files options for generic jobs.

Figure 9-20 Generic Job Required Files

Table 9-16 Generic Job Required Files

Name	Name of the required file. The icon next to the name indicates that the file is located on your local system.
Location	Path of required file. If the location is not listed, you must either find the file by clicking the modify icon or delete the file.
Action	**Replace** - Select the first action icon to replace the file. You can choose a file either from your local computer or from the Hyperion Foundation Repository to replace this file. Replacement files must have the same name as the original. **Delete** - Select the second action icon to delete the file.
Add Files Manually	Method to locate the required files for a job. You can either enter each required file separately and/or zip the required files and enter the zip file manually. Hyperion Foundation extracts the zipped files and adds them to the required files summary list.

Database Connectivity

Enter a valid database username, password and connect string.

Figure 9-21 and Table 9-17 shows the output options for generic jobs.

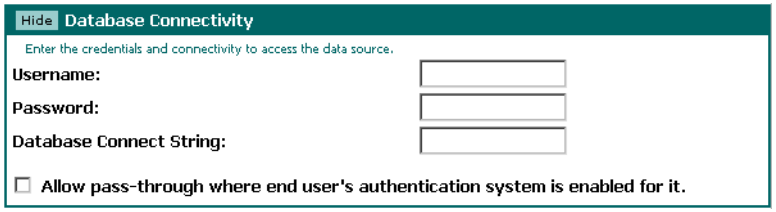


Figure 9-21 Generic Job Database Connectivity

Table 9-17 Generic Job Database Connectivity

Username	Enter your username for the data source.
Password	Enter your password for the data source.
Database Connect String	Enter the database connect string for the data source.
Allow pass-through where end user's authentication system is enabled for it	Enable to allow access to this job's data sources without entering credentials.

Output Options

Figure 9-22 and Table 9-18 shows the output options for generic jobs.

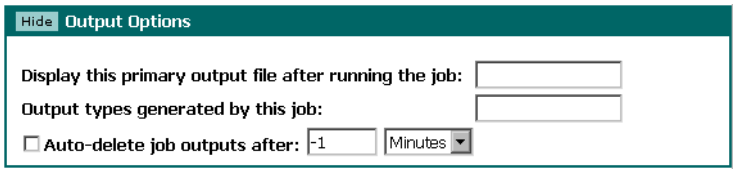


Figure 9-22 Generic Job Output Options

Table 9-18 Generic Job Output Options

Display this primary output file after running the job:	Multiple formats can be specified separated by a semi-colon, for example, *.html; *.pdf. Once one of the formats matches at least one file, the rest of the formats are ignored. If nothing is specified, all formats are shown.
Output types generated by this job	The value entered here is stored as the property, `SYS_OUTPUTFILETYPE`. Use API in your application to access this property.
Auto-delete output after the job is run	Enable to automatically delete job output. Indicate when to delete by entering a number and selecting a time frame (minutes, hours, days, weeks, years) after the job is run. Default is minutes.

Modifying SQR and Generic Job Properties

The properties of SQR and generic jobs can be modified if necessary. For general instructions on modifying properties, see “Viewing or Modifying Properties of an Item” on page 2-12. For details on SQR job properties, see “SQR Job Properties” on page 9-2. For details on generic job properties, see “Generic Job Properties” on page 9-26.

Output Summary

The Output Summary section is available when modifying properties. You can delete job output here.

Figure 9-23 shows the output summary for SQR and generic jobs.

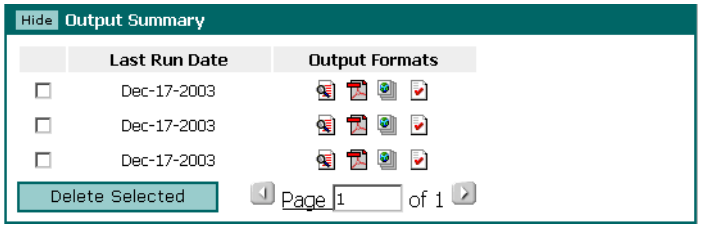


Figure 9-23 Output Summary

Setting SQR and Generic Job Parameters

You need to set the necessary run time values for jobs before the job is run or scheduled. You can save these values as personal job parameters, so they can be used again. The following instructions provide information on setting job parameters while running a job. For information on setting job parameters while scheduling a job, see “Scheduling a Job” on page 7-7.

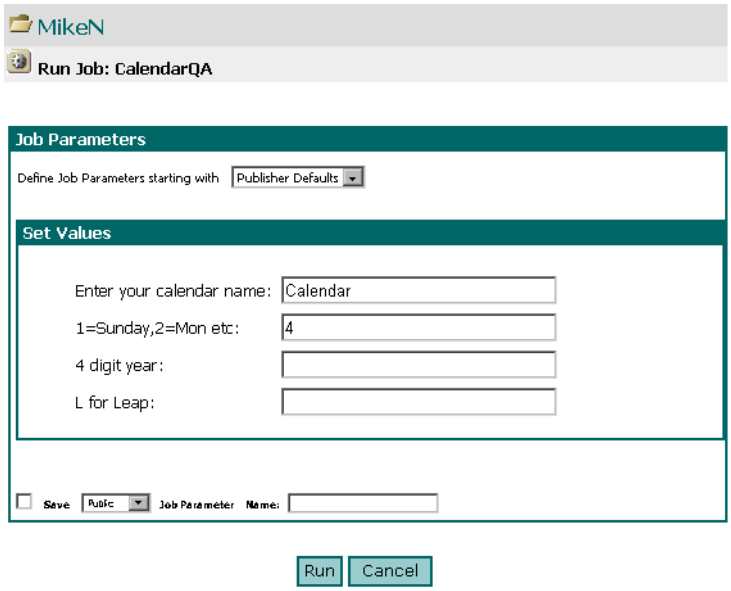
To set job parameters for SQR and generic jobs:

1 Run a job.

Job parameters can be specified when creating or modifying a job schedule or when running a job. See “Running a Job” on page 7-5 or “Scheduling a Job” on page 7-7 to see how to get to the first steps of this process.

2 **Enter the necessary run time values in the Set Values section if you are running the job or on the Select Job Parameters page if you are scheduling the job.**

You will need to specify values for all of the ASK parameters unless you specified default values during publishing or if you have a saved job parameter in the Job Parameter list.



3 **If you want to save these values as Personal job parameters, select Save and enter a name for the job parameters.**

Running an SQR and Generic Job

You need to set the necessary run time values for jobs before the job is run or scheduled. You can save these values as personal job parameters, so they can be used again. The following instructions provide information on setting job parameters while running a job. For information on setting job parameters while scheduling a job, see "Scheduling a Job" on page 7-7.

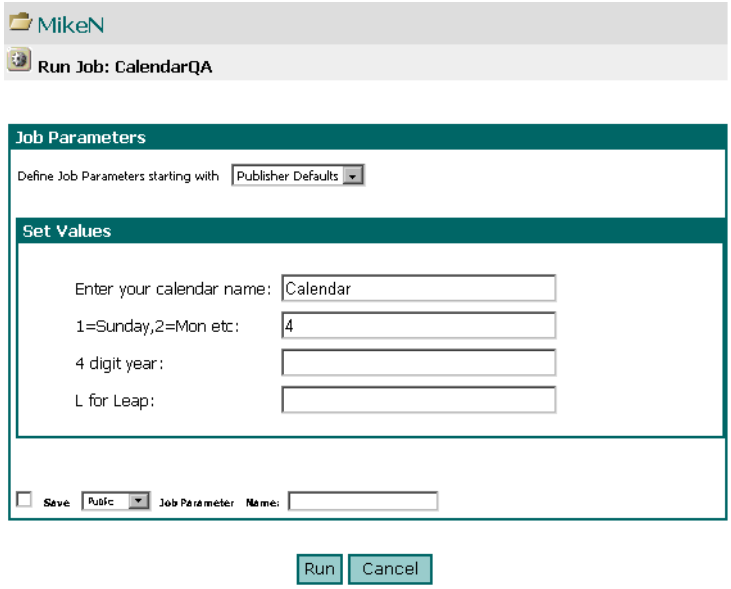
To set job parameters for SQR and generic jobs:

1 Run a job.

Job parameters can be specified when creating or modifying a job schedule or when running a job. See "Running a Job" on page 7-5 or "Scheduling a Job" on page 7-7 to see how to get to the first steps of this process.

2 **Enter the necessary run time values in the Set Values section if you are running the job or on the Select Job Parameters page if you are scheduling the job.**

You will need to specify values for all of the ASK parameters unless you specified default values during publishing or if you have a saved job parameter in the Job Parameter list.



3 **If you want to save these values as Personal job parameters, select Save and enter a name for the job parameters.**

Job Output Options when Scheduling SQR jobs

In addition to the standard job output options explained in "Scheduling a Job" on page 7-7, SQR jobs offer additional email notification options and output directory options.

Email Notification Options

SQR jobs offer the additional email notification options explained in Figure 9-24 and Table 9-19.

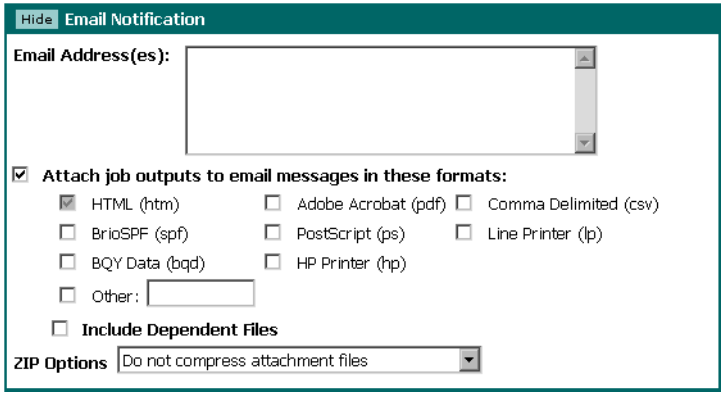


Figure 9-24 Email Notification Options

Table 9-19 Email Notification Options

Email Address(es)	Enter email addresses to send the status reports to. Separate email addresses by semicolons, colons, space characters, commas, or new lines.
Attach job output to email messages in these formats	Select to send an attachment in the formats selected. HTML format is automatically sent if not de-selected.
Include dependent files	Select to include all files dependent on this job in the email attachment.
Zip Options	Select Zip file options: ■ **Do not compress attachment files** – Zip file not created ■ **Combine all attachments into one Zip file** – Zip file created containing HTML and all file formats selected ■ **Combine only HTML and Graphics into Zip file** – Zip file created containing HTML and selected graphics file formats

Output Directory Options

SQR jobs have the additional output directory options shown in Figure 9-25 and explained in Table 9-20.

Note The Save to Output Directory section appears only if the administrator has configured at least one output directory.

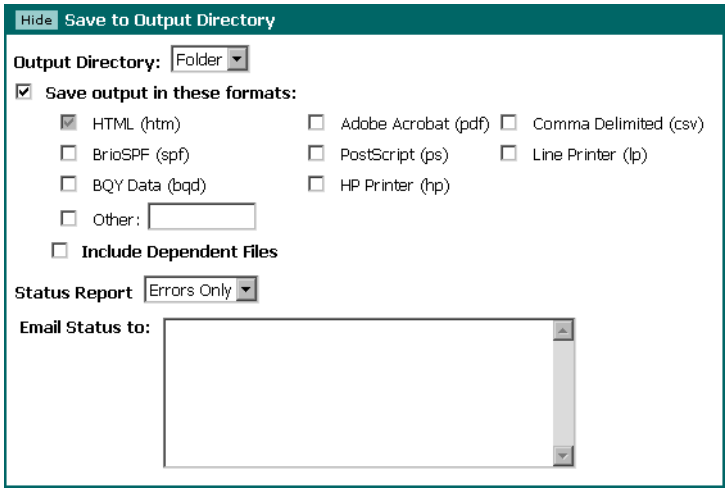


Figure 9-25 Output Directory Options

Table 9-20 Output Directory Options

Output Directory	Your job is automatically saved to the directory the job i in. Select an output directory from the drop-down, if you want your job output to go in a different output directory. (Your administrator configures the directory list.)
Save output in these formats	Select to save job output in additional formats. HTML is automatically generated. This options works only when selecting a directory from the drop-down list.
Include dependent files	Select to include all files dependent on this job.
Status Report	Select when you want to receive status reports. The default is to receive a status report only when there are errors.
Email Status to:	Enter email addresses to send the status reports to. Separate email addresses by semicolons, colons, space characters, commas, or new lines.

Working with Secure SQR Jobs

Secure SQR jobs require different handling than nonsecure jobs. Secure SQR jobs have security tags applied to different sections of a report. This section explains what they are and how their security is accomplished and protected.

The SQR programmer can apply security tags to sections of a report, thereby restricting access to each section to a particular set of users. Such a report is a "secure" SQR report. For details on programming a secure SQR report, see your SQR documentation.

When the secure SQR job is run, the security tags are written to the SPF file. When the SPF file is executed by the Job Service, each resulting HTML file is given a single security tag that assures that only users who are allowed to see all of the data in that file can see the file.

It is important to set the bursting (or demand paging) options appropriately for a secure report, so that the resulting files correspond to the way the SQR program divided data among users. If you do not burst the SPF file correctly, security will be preserved but some users may not have access to some data they should be able to see.

The SPF file written by running a SQR program can itself be published in the Repository. Executing a secure SPF file yields the same output with the same access privileges as though you had executed the secure SQR job.

Hyperion Performance Suite produces only HTML output (with images) for a secure report.

Access Privileges on Secure SQR Jobs

The access privileges on a secure SQR file are automatically set so that only the owner (the publisher) of the job can execute the job. Other users have no access to the SQR file. The access on the SQR file can only be modified by the owner. Modifying these access privileges loosens the default security for this secure SQR job.

The access privileges on a secure SPF file that was generated by a secure SQR program do not come from the output access privileges in the job properties. Instead, they are always set so that only the owner can access the file.

Note The globaladministrator role has full access to every resource (object) in the system; this includes secure reports, SPF, and output files. The globaladministrator role's complete access is implied throughout this documentation, even when not stated.

The access privileges on the output files (HTML or images) are derived, first, from the user's current access when the job is executed, or from the job's output access privileges if they are set. In addition, each output file may have a set of security tags associated with the output. The job owner can change the access privileges on the SPF or output files. In the case of the SPF file, which contains all of the data, broadening the access means relaxing the security on the report.

For a particular user to see an output file (HTML or image), the user must have *all* of the following:

- View access on the report's folder.
- View access on the output file.
- Access granted by the output file's SQR security tag, which is derived from the security tags in the code.

The security tags are not checked when job output is deleted. Only the normal access privilege checking is performed. This gives the owner of a job output file the ability to delete it, regardless of whether the security tags allow the owner to view the file's contents. If a secure report creates any data files through use of SQR's OPEN statement, only the job owner has view access to them. The owner can relax the security for these files, as for the SQR and SPF files.

Security Mode

Every item in SQR has a security mode that is set either on or off.

The security mode for all items derived from a secure SQR file is on. These items include the SPF file, all output files, the SQRProgramOutput item, and the SPFFileOutputCollection item. If a file is secure, this information appears in the Properties dialog box (on the Advanced tab).

It is possible to create a secure SQR program that produces both secure and nonsecure output. The SQR program can be coded so that some pages are output without any security, while the rest are secure. In this case, all users who have access to the output files through normal Hyperion Performance Suite access control will see the non-secure output pages as well as any secure pages they are authorized to see. The ability to create both secure and non-secure pages within a secure SQR program is governed by the use of the `security` command in SQR.

You can create a new version of a secure report, or replace an existing version, but the security mode for the new one must be the same as for any existing versions.

Recommendations for Security

The following actions are recommended to ensure the security of secure SQR and SPF jobs in your Hyperion Performance Suite system.

- Set up one or more dedicated user accounts for secure SQR or SPF jobs.
- A dedicated account can be used for a single secure report or for a group of related secure reports.
- Ensure that secure jobs are run only from dedicated accounts.
- Everyone with access to such an account can publish secure jobs, and thereby have access to the SPF file, which contains all the data. Therefore, limit access to each dedicated account to as few people as possible.

Note to SQR Programmers

Hyperion Performance Suite has built-in conventions for designating security tags to Hyperion Performance Suite users or groups. A security tag that begins with *u#* represents a user. A security tag beginning with *g#* represents a group, as does any other security tag.

Viewing Security Information

Secure SQR programs tailor their output for different users and restrict access accordingly. You can determine whether a file related to an SQR program is secure by viewing its security mode.

A secure SQR file and its related files have *Secure mode* property set to *on*. The related files include SQR output files, SPF file collections, and SPF output collections.

To view the security mode of a file:

1. **Select the file in the Browse module and choose the Modify properties icon.**
2. **Open the Advanced Options section.**

   If the file is secure, the *Security Tags Included* box will be checked.

Supporting Exceptions in SQR or Generic Programs

This section is for SQR programmers, and programmers of generic report programs, who want to support exception notifications to users. (Users can receive email notifications or see a graphic indicator on the Exceptions Dashboard on a Personal Page.)

SQR Programming

For an SQR program to support exceptions, it must include the following program lines:

```
open 'output.properties' as 0 for-append record=32767:vary
write 0 from 'exception.default=on'
write 0 from 'exception.default.text=<exception text>
close 0
```

Generic Report Programming

For generic jobs or files to support exceptions you need to set up exception reporting through the job output properties, exception present and exception text, using the Hyperion Performance Suite API.

Setting Priority on Output Programmatically

In SQR programs, you can set the output to be high priority. In Browse module listings, users will see the *High priority* icon next to any job output or version with priority set to high. Users can also sort according to priority (normal or high).

To set priority to high on the output, a program writes the string `rating=high-priority` to the `output.properties` file used by the Job Service. The following code excerpt accomplishes this:

```
open 'output.properties' as 0 for-append record=32767:vary
write 0 from 'rating=high-priority'
close 0
```

Summary

This chapter is a reference for SQR and generic job properties for publishing and scheduling.

10 SQR Custom Parameter Forms

An SQR job uses a parameter form to obtain INPUT parameter values from users at run time. This chapter explains how to customize parameter forms.

In This Chapter

Customizing Parameter Forms for SQR Jobs 10-2

Elements of Parameter Forms. 10-8

Parameter Forms: Examples and Tips 10-13

Customizing the JavaScript Validation Routines 10-33

Customizing Parameter Forms for SQR Jobs

By default, when a user runs an SQR job or creates or modifies a parameter list, Hyperion Foundation generates a standard parameter form to collect parameter information. For some SQR jobs, you may prefer to customize this standard form. For example, it might be desirable to provide a more sophisticated field layout, or your organization may have conventions to follow. You can create a custom parameter form and associate it with the job at run time. Whenever a user runs or schedules a job that is associated with a custom form, the custom form is displayed instead of the standard form.

A parameter form consists of a simplified HTML page that contains a form with user-input fields. It can also be more complex, invoking JavaScript and/or an applet. However, it must *not* have the following tags:

- HTML tags such as <HTML>, <BODY>, <FORM>, and so on
- Any HTML that specifies the names and descriptions of the parameters
- Any HTML that specifies the access control for the parameters

Note To start creating custom parameter forms, you can use the job's standard form as a model or as a starting point for modification. See "Customizing Parameter Forms for SQR Jobs" on page 10-2.

Processing Parameter Forms

The SQR job's associated parameter form or the standard form appears when a user performs any of these actions:

- Chooses the job's **Run Job** button while in an item list.
- Chooses the name of the job while in an item list.
- Creates a new list of parameter values while scheduling a job.
- Modifies an existing parameter list while scheduling a job.

After the user completes the form and submits it for execution, Hyperion Foundation performs the following actions:

1. Validates any parameters for which validation was defined.
2. Processes the form.

   The information collected in the form can include parameter values and database logon information as required by the job. When brought up in the context of scheduling, the information collected also includes the parameter list name and description.
3. Creates or modifies the parameter list or runs the job, as applicable.
4. If the job was run, retrieves job output for the user to view.

Assigning a Parameter Form to a Job

After creating a custom parameter form, do the following to assign it to an SQR job:

1. **In the Browse module, navigate to the desired SQR job, and choose Modify Properties.**
2. **Select Parameters from the top menu.**
3. **Select Custom Form and browse to the file you want to use.**
4. **If your parameter form uses additional files, such as GIF images, choose Show Required Files.**

   For information about adding required files, see "Add Required Files" on page 9-9.
5. **When you are finished changing properties for the form, choose OK.**

Note Custom parameter forms created in a version prior to Hyperion Performance Suite release 8.0 need to be updated before you can use them with Hyperion Performance Suite. This note explains how to update old forms.

Hyperion Performance Suite custom parameter forms specify only the portion of the displayed form in which the user sets the values of the parameters. As a result, you must remove the following portions of old customized forms:

- HTML tags such as <HTML>, <BODY>, <FORM>, and so on
- Any HTML that specifies the names and descriptions of the parameters
- Any HTML that specifies the access control for the parameters

Also, the *DropDown* widget type now allows only a single selection. The new widget type *ListBox* can allow the selection of a single value or multiple values. The following tags support *ListBox*es, and are described in Additional ElementsTable 10-2.

```
<WS:IsParameterTypeCond type="ListBox">
<WS:IsParameterMultiValuesCond hasValue="yes">
```

Hyperion Foundation determines whether an HTML file is a valid parameter form by checking for the existence of a special element: `<WS:ONEAppClient version="8.0">`

Assigning the Standard Form to a Job

If you have already assigned a custom form to a job, you can re-assign the standard form.

To assign the standard form to a job:

1. In the Browse module, navigate to the desired SQR job, and choose **Modify Properties**.
2. Select **Parameters** from the top menu.
3. Select **Standard Form**.
4. Choose **OK**.

Editing a Parameter Form

For custom forms, edit the form before you assign it to a job. If you choose to edit a form after it is assigned to a job, you can edit it by downloading it to your local system, making the changes, and then uploading it back to the Repository. An edited standard form is uploaded as a custom form.

Hyperion Performance Suite parameter forms contain special tags that graphical HTML editors cannot display correctly. However, the tags are designed so that you can still carefully make some layout modifications using some graphical HTML editors. Before using a particular editor, make certain that it does not alter the code.

Using such an editor to modify a parameter form requires knowledge of the Hyperion Performance Suite parameter-form tags. When editing a parameter form, be careful to keep the groups of tags together. Otherwise, the resulting form may not work correctly.

You can also edit a parameter form using a nongraphical HTML editor, such as Macromedia Homesite. With any editor, be careful not to alter the Hyperion Performance Suite tags.

To edit a parameter form:

1 In the Browse module, navigate to the SQR job.

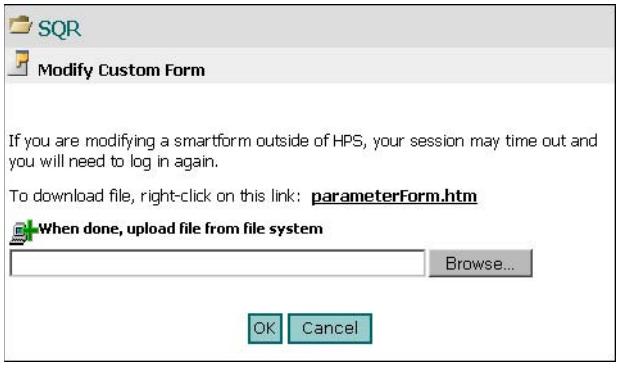
2 Choose **Modify Properties** for the job.

3 Select **Parameters** from the links on top.

4 Choose **Show** Custom Form.

5 Select **Modify** next to either Standard Form or Custom Form.

6 Right-click the link on the Modify Custom Form page.



7 **Select Save Target As... from the drop-down menu.**

8 **Specify a location in your file system to save an editable copy of the standard form, and choose Save.**

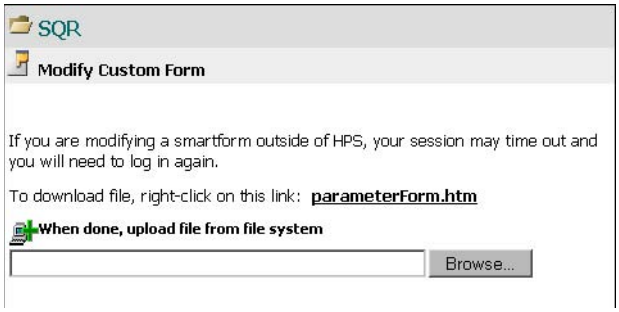
9 **Edit the form on your local system.**

Use an HTML editor that does not alter the code.

For details on the special HTML elements for parameter forms, see "Elements of Parameter Forms" on page 10-8.

10 **Navigate back to the Modify Custom Form page and select Browse... to choose your edited form file.**

Your edited file must have the same name as the original file.



11 **Choose OK to save changes.**

Note For localized installations, each parameter form's HTML code, as well as its Character encoding property, must specify its character encoding method.

Elements of Parameter Forms

You create a parameter form as an HTML file that contains special *elements*. Before displaying a parameter form, Hyperion Foundation interprets and processes any elements that it encounters in the parameter form. Typically, Hyperion Foundation processes an element by replacing it with the value indicated by the element. For example, it replaces `<WS:JobName/>` with the name of the job.

Note Parameter form elements are case sensitive.

Types of Elements

There are three main types of elements for parameter forms:

- Basic
- Conditional
- Looping

Basic Elements

A basic element has the form:

```
<WS:xxx/>
```

An example is: `<WS:JobName/>`.

Conditional Elements

A conditional element has the form:

```
<WS:xxxCond hasValue="X">
...
</WS:xxxCond>
```

You can insert any HTML or applicable parameter form elements between the start tag and its end tag. Hyperion Foundation evaluates whether the specific condition indicated by the *`hasValue`* argument is true or false. If true, the enclosed HTML is included in the form that appears. If false, Hyperion Foundation ignores the HTML enclosed within the start and end tags.

Looping Elements

A looping element has the form:

```
<WS:xxxLoop>
...
</WS:xxxLoop>.
```

An example is `<WS:ParameterPickListLoop>`. You can insert any HTML between the start and end tags. When Hyperion Foundation processes these elements, it processes the contents of the loop until the loop finishes. The termination condition for the loop depends on the specific element.

Required Elements

A parameter form provides required elements and additional elements to use if, for example, you are setting up a parameter pick list or need to access information from a database.

Required elements include those that identify a file as a parameter form file, return parameter information, and return the URL to use when the user submits the form for processing. Table 10-1 The following table lists the required elements for parameter forms.

Table 10-1 Required Elements

Elements	Function
<WS:ONEAppClient version="8.0" />	Identifies the form as a parameter form 8.0.
<WS:ParameterAskCond hasValue="n"></WS:ParameterAskCond>	Selects the nth ASK parameter, where *n* is from 1 to the total number of ASK parameters.
<WS:ParameterFieldName/>	Returns the name of the HTML form field for setting the value of the parameter currently selected in `ParameterInputCond` or `ParameterAskCond`.
<WS:ParameterInputCond hasValue="n"></WS:ParameterInputCond>	Selects the nth INPUT parameter, where *n* should be from 1 to the number of INPUT parameters.
<WS:ParameterName/>	Returns the current parameter name.
<WS:ParameterValue/>	Returns the value of the current parameter. If the parameter is for an existing parameter list, returns the current value of the parameter.

The sections that follow show code snippets that use the required elements.

Parameter Forms Version

The following code snippet shows the element that identifies the version of the parameter form. Any parameter form must include this element.

```
<!-- <WS:ONEAppClient version="8.0" /> -->
```

Specify Import File

The element that follows specifies the name of the import file for the parameter form.

```
<WS:IMPORT_file="parameterFormJavaScript.imp"/>
```

Parameter List Elements

Scheduling a job requires the creation of a parameter list. A parameter list has a name and description and contains values of each of the parameters associated with the job. When scheduling a job, the user selects a parameter list. This is the set of parameters that Hyperion Foundation uses when it runs the scheduled job.

Parameter Display Elements

The following code snippet shows the use of elements for handling parameter values. If your form uses a parameter pick list, see the sample code at the end of this chapter.

```
<WS:ParameterInputCond hasValue="1">     <!-- 1st parameter -->
                                                <!-- Name of parameter -->
        <TD VALIGN="MIDDLE">
            <FONT face="Arial, Helvetica, sans-serif" size="-1">
                   <B><WS:ParameterName/></B>
            </FONT>
        </TD>

        <TD VALIGN="MIDDLE" COLSPAN="2">
        <INPUT TYPE="text" NAME="<WS:ParameterFieldName/>"
               VALUE="<WS:ParameterValue/>" SIZE="30">
        </TD>
</WS:ParameterInputCond>
```

The `<WS:ParameterInputCond>` and `<WS:ParameterAskCond>` tags select the INPUT or ASK parameter that is used to resolve the `<WS:ParameterName/>`, `<WS:ParameterFieldName/>`, and `<WS:ParameterValue>` tags. You must set the `hasValue` argument from 1 to the number of INPUT or ASK parameters.

Additional Elements

Table 10-2 lists other elements available for use in parameter forms.

Table 10-2 Additional Elements

Elements	Function
<WS:EmbedParameterValidationRoutines/>	Adds the JavaScript parameter validation routines to the form. For more information about validation routines.
<WS:FormUsesParameterValidationCond/>	Evaluates to true if the current job requires JavaScript validation routines.
<WS:HasParameterValidationCond>	Tests to see whether the current parameter has a validation function.
<WS:HasParameterValidationMaskCond>	Returns true if there is a mask associated with the current parameter's validation function.
<WS:InitializeParameterPickList/>	Initializes the current parameter's static or dynamic choice options. Prints an error message if initialization fails.
<WS:IsParameterMultiValuesCond hasValue="yes">	Evaluates to true if the parameter allows multiple values.
<WS:IsParameterTypeCond type="DropDown">	Evaluates to true if the allowable values for the current parameter should display as a drop-down list that allows only a *single* selection.
<WS:IsParameterTypeCond type=editbox>	Evaluates to true if the parameter should display as an edit box.
<WS:IsParameterTypeCond type="ListBox">	Evaluates to true if the allowable values for the current parameter should display in a list box (a drop-down list that allows either single *or multiple* selections). To enable multiple selections, you must set `IsParameterMultiValuesCond` to "yes".
<WS:IsParameterTypeCond type= radiobuttons >	Evaluates to true if the allowable values for the current parameter should display as radio buttons.
<WS:ParameterListPublisherDefaultsFieldName/>	Returns the name of the HTML form field used for the "Publisher Defaults" parameter list.
<WS:ParameterPickListLoop> </WS:ParameterPickListLoop>	Iterates through the values of a parameter's pick list.
<WS:ParameterPickListValue/>	Use within a <WS:ParameterPickListLoop>; returns the next value in a parameter's pick list.

Table 10-2 Additional Elements *(Continued)*

Elements	Function
<WS:ParameterPickListValueSelected selectType = "select"/>	Must be used within a <WS:ParameterPickListLoop>; returns "selected" if the next value in the pick list is the current value for the parameter. Note that you can set `selectType` to either “select” or “check.” If the pick list for a parameter has only a few values, you might prefer to display the different options using HTML radio buttons. In this case, setting the selectType to “check” returns “checked.” You can use this to indicate which option is the current value for the parameter.
<WS:ParameterValidationMask/>	Returns the mask associated with the current parameter's validation function.
<WS:ParameterValidationName/>	Returns the name of the current parameter's validation function.
<WS:PostedInputValue fieldName=xxx/>	When used in a parameter form, this element is replaced by the input value posted in the field xxx. This is useful when you are developing a multi-page parameter form where you want to post values from one page to the next. You can also use this element to restrict the values of a dynamic choice parameter, based on previous input. Say your report takes *state* and *city* parameters, and you create a multi-page form that contains two pages. The first page requests the *state*, the second requests the *city*. You may want to use the value entered for *state* to filter the options presented for *city*. You can retrieve only cities in the specified state by using `<WS:PostedInputValue fieldName=param_1/>` in the Clause of the dynamic-choice definition for *city*. For more information, see “Parameter Forms: Examples and Tips” on page 10-13.
<WS:PublisherDefaultsParameterValue/>	Returns the value of the current parameter in the “Publisher Defaults” parameter list.
<WS:RequiredParameterCond>	Evaluates to true if the current parameter is non-optional.
<WS:SaveDefaultsCheckboxFieldName/>	Returns the name of the HTML form field that represents the “save default” check box.
<WS:ShowFormsParameterListCond>	Determines whether to display parameter lists. Differs from `<WS:hasParameterListCond/>` in that it also checks whether the publisher wants the parameter lists displayed.
<WS:ShowFormsSaveMyDefaultsCond>	Determines whether the publisher enabled 'save as my defaults'.
<WS:ShowParameterListPublisherDefaultsCond>	Evaluates to true if the job is configured to display the “Publisher Defaults”.

Parameter Forms: Examples and Tips

This section offers some ideas of what you can do with parameter forms, as well as code examples to show you how.

Restricting a List Based on User

When defining the list of values for a dynamic-choice parameter, whether using the standard parameter form or developing a custom parameter form, you may want to filter the database values based on who runs the job (or creates/edits the parameter list). To do so, use the following tag:

```
<WS:UserName/>
```

In the Browse module, you can use the `<WS:UserName/>` tag in the `WHERE` clause (*Clause* option) for a dynamic-choice parameter.

Restricting a List Based on Previous Input

When defining the list of values for a dynamic-choice parameter in a custom parameter form, you may want to filter the database values according to previous form input. You can do so in either of the following ways:

- Retrieve all the values. Then use JavaScript to filter them based on the previous input.
- Make a multi-page parameter form. Add the tag `<WS:PostedInputValue fieldName=xxx/>` to the `WHERE` clause. (You enter the `WHERE` clause in the *Clause* option when defining a dynamic-choice parameter in SQR Job Publisher.)

Example 1

Suppose your report takes parameters *city* and *state*. City is a dynamic-choice list, which you want to filter according to the user's input for *state*. Using the multi-page parameter form method, you obtain a value for *state* from the user on the first page. On the second page, you display a dynamic-choice list for *city*, whose definition includes the following `WHERE` clause:

```
WHERE state='<WS:PostedInputValue fieldName=param_1/>'
```

Parameter Pick List Example

The code snippet that follows shows the use of tags for parameter pick lists.

```
<!-- if parameter is a dynamic choice or static choice -->

        <WS:ParameterInputCond hasValue="2">            <!--2nd parameter-->
           <SELECT NAME="<WS:ParameterFieldName/>">
              <WS:ParameterPickListLoop>  <!-- iterate over values in pick list -->
                  <OPTION VALUE="<WS:ParameterPickListValue/>"
                         <WS:ParameterPickListValueSelected
                              selectType="select"/>><WS:ParameterPickListValue/>
                  </OPTION>
              </WS:ParameterPickListLoop>
           </SELECT>
         </WS:ParameterInputCond>
```

Parameter Form Code Examples

This section shows you two parameter forms for a hypothetical SQR report named “Sales Charts.” The first is a custom form, and the second is the standard form that you can generate for the report.

The Custom Parameter Form

The first example parameter form is a custom form for an SQR report program named “Sales Charts.” The Figure 10-1 shows the form as displayed in Browse when a user runs the job.

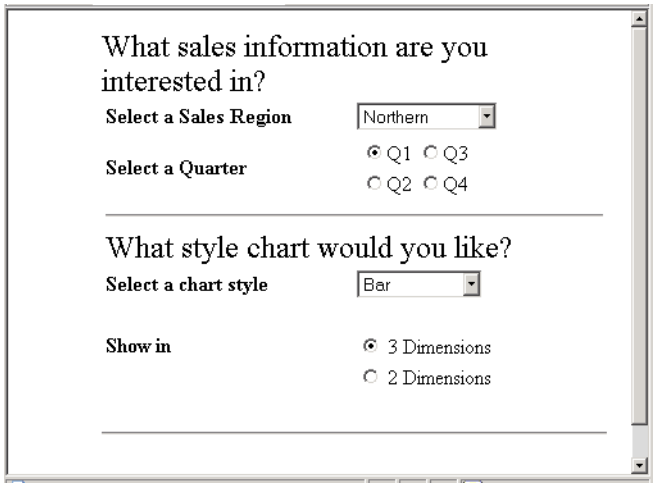


Figure 10-1 Custom Parameter Form for Sales Charts

This custom parameter form uses a drop-down list and radio buttons, so examining its code will show you how to implement those types of HTML controls.

The code of the custom parameter form follows.

Custom Parameter Form for Sales Chart Report

```
<!-- Example custom parameter form for Sales Charts

     This form is used for:
        1) Running the job
        2) Creating a parameter list for the job
        3) Editing a parameter list for the job
-->

<!-- this line defines the version -->
<!-- <WS:ONEAppClient version="8.0"/> -->

<WS:Import file="parameterFormJavaScript.imp"/>  <!-- imports the tag to submit
the form -->

    <TABLE border="0" width="98%" cellpadding="0" cellspacing="0">
    <tr>
        <td width="65" height="1"><!--TD  !--> </td>
        <td valign="top" width="400" height="1"><font size="5">
<!--TD VALIGN=TOP ALIGN=LEFT!-->
        What sales information are you interested in?</font><table
        border="0" width="100%">
            <tr>
                <td width="40%"><strong>Select a Sales Region</strong></td>
                <td width="40%"><select name="Param_1" size="1">
                    <option>Northern</option>
                    <option>North-Eastern</option>
                    <option>Eastern</option>
                    <option>South-Eastern</option>
                    <option>Southern</option>
                    <option>South Western</option>
                    <option>Western</option>
                    <option>North Western</option>
                    <option>Central</option>
                </select></td>
            </tr>
            <tr>
                <td width="40%"><strong>Select a Quarter</strong></td>
                <td width="40%"><table border="0">
                    <tr>
                        <td><input type="radio" checked
                        name="Param_2" value="1">Q1 </td>
                        <td><input type="radio" name="Param_2"
                        value="3">Q3</td>
                    </tr>
```

```
                    <tr>
                        <td><input type="radio" name="Param_2"
                        value="2">Q2</td>
                        <td><input type="radio" name="Param_2"
                        value="4">Q4</td>
                    </tr>
                </table>
                </td>
            </tr>
            <tr>
                <td colspan="2"><hr>
                </td>
            </tr>
            <tr>
                <td colspan="2"><font size="5">What style chart
                would you like?</font></td>
            </tr>
            <tr>
                <td><strong>Select a chart style</strong></td>
                <td><select name="Param_3" size="1">
                    <option>Bar</option>
                    <option>Line</option>
                    <option>Pie</option>
                    <option>Stacked-Bar</option>
                    <option>100%-Bar</option>
                </select></td>
            </tr>
            <tr>
                <td> </td>
                <td> </td>
            </tr>
            <tr>
                <td><strong>Show in</strong></td>
                <td><input type="radio" checked name="Param_4"
                value="YES" > 3 Dimensions </td>
            </tr>
            <tr>
                <td> </td>
                <td><input type="Radio" name="Param_4" value="NO"> 2 Dimensions
</td>
            </tr>
    <tr>
        <td> </td>
        <td> </td>
    </tr>
            </tr>
        </table>
        <hr color="#0000FF">
        <p><!--hr!--> </p>
        </td>
    </tr>
    <tr>
        <td> </td>
        <td> </td>
    </tr>
</table>
```

The Standard Parameter Form

The standard way to create a custom parameter form for an SQR job is to generate and save the standard form, and then modify it. So the custom form for Sales Charts would typically be developed from that job's standard form, shown in the Figure 10-2.

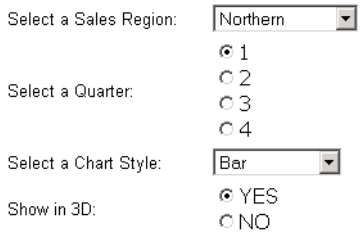


Figure 10-2 Standard Parameter Form for *Sales Charts*

The code of this standard parameter form follows.

Standard Parameter Form for *Sales Charts*

```
 <!--
     This is the template which is used to either:
        1) Run a Job which requires parameters and/or database user information
        2) Create a Parameter List for a Job
        3) Edit a Parameter List for a Job

     This template is used when there is no custom form associated with the Job.
-->

<script language="JavaScript">
<!--

    /* Set of common utility functions */

/* function to check whether the text has non-space characters */
function hasCharacters(text) {
    if (text.length <= 0)
        return false;

    foundChar = false
    // Iterate looking for a non-whitespace char
    for (i=0; i < text.length; i++) {
        ch = text.charAt(i)
         if ((ch != ' ') && (ch != '\n') && (ch != '\t') && (ch != '\r') && (ch !=
'\b'))
            return true;
```

```
    }
    return false;
}

/* Utility function to check if text has valid email address format */
function isValidEmailFormat(addr) {
    var firstCh = addr.charAt(0)
    var lastCh = addr.charAt(addr.length-1)

    // Make sure the email address doesn't start or end with a delimiter
    if ((firstCh == "@") || (lastCh == "@") || (firstCh == ".") || (lastCh == "."))
        return false;

    // Make sure the email address does not contain consecutive delimiters
    if ((addr.indexOf("@@") >= 0) || (addr.indexOf("..") >= 0) ||
(addr.indexOf("@.") >= 0) || (addr.indexOf(".@") >= 0))
        return false;

    var pieces;
    pieces = addr.split("@");
    // Make sure there's exactly 1 "@" symbol and that the domain portion has
characters and does not end with the "." character
    if ((pieces.length != 2) || !hasCharacters(pieces[0]) ||
(pieces[1].charAt(pieces[1].length-1) == ".")) {
        return false;
    }
    var domainPieces;
    domainPieces = pieces[1].split(".");
    // Make sure there is at least one "." in the second half of email address
    if (domainPieces.length < 2) {
        return false;
    }
    // Make sure all pieces have characters
    for (j=0; j < domainPieces.length; j++) {
         if (!hasCharacters(domainPieces[j])) {
             return false;
         }
    }
    return true;
 }

/**
 *  Function that checks whether any of the field's items are checked
 */
function anyChecked(field) {
    if (field.length == null) {
       return field.checked;
    }
    else {
        for (var i=0; i <field.length; i++) {
             if (field[i].checked) {
                 return true;
             }
         }
     }
```

```
    return false;
}

/**
 *  Function to get the index of the first checked item (e.g. set of radio buttons)
 *  Returns -1 if not found.
 */
function getCheckedIndex(field) {
    if (field.length != null) {
         for (var i=0; i <field.length; i++) {
             if (field[i].checked) {
                  return i;
             }
         }
    }
    return -1;
}

/**
 *  Function to check or uncheck a set of fields
 */
function checkAll(field, state) {
    if (field.length == null) {
      field.checked = state;
    }
    else {
        for (var i=0; i <field.length; i++) {
            field[i].checked = state;
         }
     }
}

/**
* Note - do NOT name this function “isInteger”, as there is a similarly named
*       method in formValidation.js
*/
function isValidInteger(val) {
    for (var i=0; i < val.length; i++) {
          var c = val.charAt(i);
          if ((i ==0) && ((c == "-") || (c == "+"))) {
   // Ignore leading plus or minus
   continue;
           }
           // Make sure character is a digit
           if (!isValidDigit(c))
   return false;
    }
    return true;
}

/**
* do not name isDigit, as this conflicts with a similar names method in
formValidation.js
*/
function isValidDigit(val) {
```

```
    return ((val.length == 1) && (val >= "0") && (val <= "9"));
}
    var debug = false;

    function validateParameterListInfo() {

        // Ensure that the parameter list name is non-null
        var nameField = document.forms[0].ParameterListName;
        if (nameField.value.length == 0) {
            alert("Please enter a name for the parameter list.");
            nameField.focus();
            return false;
        }
        if (nameField.value.search("\"") != -1) {
           alert("A parameter list name cannot contain double-quote (\").  Please
re-enter.");
            nameField.focus();
            return false;
        }
        return validateParameterInfo();
    }

    function validateLoginInfo() {
        return true;
    }

   // lookupInput
   // looks up an input in a form. Tries to reference the input by name
   // to avoid JS errors when the input does not exist. If the input is not found,
   // then null will be returned
   //
   // Since inputs of type "select-one" and radio buttons use a different
   // object model (each radio button has an input object), when radio
   // buttons are encountered, this routine returns an array containing
   // all the matching radio button. The array makes the radio button model
   // a lot closer to the select-one model and consequently radio buttons
   // are easier to work with

   function lookupInput(form, input){
      if (debug) alert("looking up " + input + " in " + form.name);

      if (debug){
          var names = "";
          for (var i = 0; i < form.elements.length; i++){
                names = names +  form.elements[i].name + " ";
          }
          alert(names);
      }
      var radioArray = null;
      for (var i = 0; i < form.elements.length; i++){
         if (form.elements[i].name.toLowerCase() == input.toLowerCase()){
             if (debug) alert("lookupInput: found " + input);
             if (form.elements[i].type.toLowerCase() == "radio"){
                 Array.prototype.type="radio";
                 if (radioArray==null){
```

```
                    radioArray = new Array(0);
                }
                // below we implement a push using concat because push is
                // not supported by JS 1.2 in IE (it fails without an error)
                // radioArray.push(form.elements[i]);
                radioArray = radioArray.concat(new Array(form.elements[i]));
            }
               else{
               if (debug) alert("lookupInputs: return " + input);
                return form.elements[i];
            }
        }
    }
    return radioArray;// radioArray will be null if the input was not found
}

// lookupSingleInput
// looks up an input in a form. Tries to reference the input by name
// to avoid JS errors when the input does not exist. If the input is not found,
// then null will be returned
//
// This function differs from lookupInput: if input references a radio button,
// this function returns the selected radio button. Otherwise null is returned.
function lookupSingleInput(form, input){

    if (debug){
        alert("looking up " + input + " in " + form.name);
        var names = "";
        for (var i = 0; i < form.elements.length; i++){
              names = names +  form.elements[i].name + " ";
        }
        alert(names);
    }
    var radioButton = null;
    for (var i = 0; i < form.elements.length; i++){
       if (form.elements[i].name.toLowerCase() == input.toLowerCase()){
           if (debug) alert("lookupSingleInput: found " + input);
           if (form.elements[i].type.toLowerCase() == "radio") {
               if (form.elements[i].checked) {
                   if (debug) alert("lookupSingleInputs: return " +
form.elements[i].value);
                   return form.elements[i];
               }
               radioButton = form.elements[i];
           }
              else{
           if (debug) alert("lookupSingleInputs: return " + input);
               return form.elements[i];
           }
       }
    }

      // this will be null, if the parameter is not found
      // will be the value of the last radioButton if it is found (but no
      // radioButton has been checked)
```

```
      return radioButton;
   }

    // Returns true, if the given element has user input
   function objectHasInput(input, inputType) {
       if (inputType == "select-one") {
          return (input.selectedIndex != -1);
       }
       else if (inputType == "radio") {
          return input.checked;
       }
      value = input.value;
      return hasCharacters(value);
   }

   function invalidInput(prompt, value, msg){
      alert("Invalid input: " + "\"" + prompt + "\" is set to \"" + value + "\". "
+ msg);
   }
   function invalidNullInput(prompt, value, msg){
      alert("Invalid input: " + "the \"" + prompt + "\" field cannot be empty.");
   }

   // Function to validate the parameters when the submit button is pressed.
    function validateParameterInfo() {
      if (debug) alert("validateParameterInfo");
        // Ensure that the ist name is non-null
        var pcfForm = document.PCF;
      var value;
      var input;
      var inputType; // the type of control used to display the input
      var valid;
      var hasInput;
      var selectedIndex;
                        // Loop for all parameters
      input = lookupSingleInput(pcfForm, "Param_1"); // lookup is called (rather
                              // than directly referencing the param) so that if
                              // the param does not exist, the warning can be
shown

         if (input == null) {
                 invalidNullInput("Select a Sales Region");
                return false;// clause won't be output if value can be empty
          }
          else {
             inputType = input.type.toLowerCase();
             if (debug) alert("validateParameterInfo inputType:" + inputType);
             hasInput = objectHasInput(input, inputType);

                 if (!hasInput){
                     invalidNullInput("Select a Sales Region");
                    return false;// clause won't be output if value can be empty
                 }
          }
                        // Loop for all parameters
```

```
      input = lookupSingleInput(pcfForm, "Param_2"); // lookup is called (rather
                              // than directly referencing the param) so that if
                              // the param does not exist, the warning can be
shown

         if (input == null) {
                 invalidNullInput("Select a Quarter");
                return false;// This clause won't be output if the value can be
empty
          }
          else {
             inputType = input.type.toLowerCase();
             if (debug) alert("validateParameterInfo inputType:" + inputType);
             hasInput = objectHasInput(input, inputType);

                 if (!hasInput){
                     invalidNullInput("Select a Quarter");
                    return false;// clause won't be output if the value can be
empty
                 }
          }
                         // Loop for all parameters
      input = lookupSingleInput(pcfForm, "Param_3"); // lookup is called (rather
                              // than directly referencing the param) so that if
                              // the param does not exist, the warning can be
shown

         if (input == null) {
          }
          else {
             inputType = input.type.toLowerCase();
             if (debug) alert("validateParameterInfo inputType:" + inputType);
             hasInput = objectHasInput(input, inputType);
          }
                         // Loop for all parameters
      input = lookupSingleInput(pcfForm, "Param_4"); // lookup is called (rather
                              // than directly referencing the param) so that if
                              // the param does not exist, the warning can be
shown
         if (input == null) {
                 invalidNullInput("Show in 3D");
                return false;// This clause won't be output if the value can be
empty
          }
          else {
             inputType = input.type.toLowerCase();
             if (debug) alert("validateParameterInfo inputType:" + inputType);
             hasInput = objectHasInput(input, inputType);

                 if (!hasInput){
                     invalidNullInput("Show in 3D");
                    return false;// This clause won't be output if the value can
be empty
                 }
          }
```

```
   return true;
}

/**
 * validates that job's input parameters & login info are configured correctly
 */
function validateJobInfo() {
   return ((validateLoginInfo()) && (validateParameterInfo()));
}

          // Arrays that manage the parameter lists
          // Each param list is stored in its own array for the format
          // [param list name, param_1, param_2, ..., param_n]
          // The array "ParameterLists" manages all the parameter lists
          //
          // parameterLists should have same structure as in example below
          //
             //parameterLists = new Array(
           //                    new Array(  "Sample",
           //                                "1",
           //                                "2",
           //                                "3",
           //                                "4"
           //                    ),
           //                    new Array(  "sample2",
           //                                "11",
           //                                "22",
           //                                "33",
           //                                "44"
           //                    )
           //                  );
var parameterLists = new Array(
        new Array( "publisherdefaults"
                         , "Northern"
                         , "1"
                         , "Bar"
                         , "YES"
                 ),

           new Array(  "0ad72cbe-0000-0765-000000efbec5a825"
                         , "Northern"
                         , "1"
                         , "Bar"
                         , "YES"
                   ),

           new Array(  "0ad72cbe-0000-0cfe-000000f077fd28bd"
                         , "Northern"
                         , "1"
                         , "Bar"
                         , "YES"
                   ),
      null );

/**
```

```
     * Returns the text of the option selected in parameterList list box
     */
    function getParamListSelection(form){
       var input;
       var inputType; // the type of control used to display the inputvar valid;
       // use tags to iter over for each param
       input = lookupInput(form, "ParamListFN"); // lookup is called (rather
                                 // than directly referencing the param) so that if
                                 // the param does not exist, the warning can be
shown
       if (input == null){// if there is no ParamListFN alert
          alert("field ParamListFN not found in form");
       }
       else{
          inputType = input.type.toLowerCase();
          if (debug) alert("inputType:" + inputType);
          if(inputType == "select-one"){
              var paramListName = input.options[input.selectedIndex].value;
              if (debug) alert("getParamListSelection text:" +
input.options[input.selectedIndex].text);
              if (debug) alert("getParamListSelection value:" +
input.options[input.selectedIndex].value);
              return paramListName;
          }
          else{
              alert("ParamListFN must be a select field");
          }
       }
       return null;
    }

    /**
     * Return an array that represents the parameter list named 'parameterListName'
     * returns null if cannot find a parameterList with name 'parameterListName'
     */
    function lookupParameterListArrayByName(parameterListName){
       var curParamList;
       for(i = 0; i < (parameterLists.length-1); i++){
          curParamList = parameterLists[i];
          if (curParamList == null){
              alert("Found null parameter list -- this should never happen");
          }
          if (debug) alert("lookupParameterListArrayByName compare" +
curParamList[0] + " and " + parameterListName);
          if (curParamList[0] == parameterListName){
              return curParamList;
          }
       }
       return null;
    }

    function setSelectParameter(inputField, selectValue){
       for (var i = 0;i< inputField.length; i++) {
          if (inputField.options[i].text == selectValue) {
              inputField.options[i].selected = true;
```

```
            return;
        }
    }
    if (debug) alert("setSelectParameter:Failed to update " +  inputField.name + "
with " + selectValue);
   }

   function setSelectMultiplieParameter(inputField, selectValue){
       if (selectValue != null)
       {
        for (var i = 0;i< inputField.length; i++)
        {
         inputField.options[i].selected = false;
         for (var j = 0;j< selectValue.length; j++)
         {
                     if (inputField.options[i].text == selectValue[j])
                     {
                         inputField.options[i].selected = true;
                         break;
                     }
         }
        }
       }
   }

   function setRadioParameter(inputField, selectValue){
      if (debug) alert("setRadioParameter:" + inputField.length);

      for (var i = 0; i < inputField.length; i++){
        if (debug) alert("setRadioParameter compare " + inputField[i].value + "
and " + selectValue);
         if (inputField[i].value == selectValue){
             inputField[i].checked = true;
             return;
         }
      }
   }

   /**
    * update the selection made in an input control
    */
   function setParameter(inputField, selectValue){
      if (inputField == null){
         alert("setParameter: null," +  selectValue);
         return;
      }
        if (debug) alert("setParameter: setting " + inputField.toString());

      var inputType = inputField.type.toLowerCase();
      if (debug) alert("setParameter: " + inputType);

      if (inputType == "text"){
         inputField.value = selectValue;
      }
      else if (inputType == "select-one"){
```

```
         setSelectParameter(inputField, selectValue);
      }
      else if (inputType == "select-multiple"){
          setSelectMultiplieParameter(inputField, selectValue);
      }
      else if (inputType == "radio"){
         setRadioParameter(inputField, selectValue);
      }
      else if (inputType == "hidden"){
            if (debug) alert(inputField.name + " was hidden");
      }
      else{
          alert(inputType);
         alert(inputField.name + " was never set");
      }
   }

   /**
    * given an array the represents a ParameterList update the inputs on the
screen
    * to reflect the selection of the parameterList represented by
selectedParamListArray.
    */
   function setParameters(form, selectedParamListArray){
      var noOfParam = selectedParamListArray.length -1;// the -1 is to allow for
the name
      var i = 1;
      var input;

                         // Loop for all parameters
      input = lookupInput(form, "Param_1");
         setParameter(input, selectedParamListArray[i]);
            i++;
            if ((debug) && (i>noOfParam)){
                alert("setParameters: setting parameter " + i + ", only " +
noOfParam + " parameters defined");
            }
                            // Loop for all parameters
      input = lookupInput(form, "Param_2");
         setParameter(input, selectedParamListArray[i]);
            i++;
            if ((debug) && (i>noOfParam)){
                alert("setParameters: setting parameter " + i + ", only " +
noOfParam + " parameters defined");
            }
                            // Loop for all parameters
      input = lookupInput(form, "Param_3");
         setParameter(input, selectedParamListArray[i]);
            i++;
            if ((debug) && (i>noOfParam)){
                alert("setParameters: setting parameter " + i + ", only " +
noOfParam + " parameters defined");
            }
                            // Loop for all parameters
      input = lookupInput(form, "Param_4");
```

```
          setParameter(input, selectedParamListArray[i]);
             i++;
             if ((debug) && (i>noOfParam)){
                 alert("setParameters: setting parameter " + i + ", only " +
noOfParam + " parameters defined");
             }
   }

   /**
    * update inputs using a parameter list selected from parameterListName field
    * The method is invoked from onchange field in parameterListName SELECT field.
    */
   function selectParameterList(){
        var pcfForm = document.PCF;
      var paramListSelection = getParamListSelection(pcfForm);
      var selectedParamListArray = null;// the paramList values selected

      if (paramListSelection != null){
         selectedParamListArray =
lookupParameterListArrayByName(paramListSelection);
      }
      if (selectedParamListArray != null){
         setParameters(pcfForm, selectedParamListArray);
      }
   }

//-->
</script>
  <!-- imports the tag to submit the form -->

    <TABLE border="0" width="98%" cellpadding="0" cellspacing="0">
        <TR>
            <TD WIDTH="45"><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="1"></TD>
            <TD WIDTH="15"></TD>
            <TD WIDTH="160"><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="160"
HEIGHT="1"></TD>
            <TD WIDTH="100%"><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="10"
HEIGHT="1"></TD>
        </TR>

        <TR>
            <TD COLSPAN="4"><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="12" BORDER="0"></TD>
        </TR>

                      <!-- if there are parameters -->


            <!-- Start Display of Parameters -->

                              <!-- Loop for all parameters -->

                     <!-- If Parameter is NOT hidden -->
```

```
                    <TR>
                        <TD><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="5" BORDER="0"></TD>
                        <TD VALIGN="middle" COLSPAN="3"><IMG
src="/Brio/wsmedia/art/space.gif" width="20" height="5"></TD>
                    </TR>
                    <TR>
                        <TD COLSPAN="2"><IMG SRC="/Brio/wsmedia/art/space.gif"
WIDTH="45" HEIGHT="12" BORDER="0"></TD>
                                                <!-- Name of parameter -->
                        <TD VALIGN="MIDDLE"><FONT face="Arial, Helvetica, sans-
serif" size="-1">Select a Sales Region:</FONT></TD>

                        <TD VALIGN="MIDDLE" COLSPAN="2">

                        <!--IF Text Box-->

                    <!--IF Drop Down-->

                                <!-- if parameter has a pick list -->

                                <SELECT NAME="Param_1">

                                           <!-- iterate over values in pick list
-->
                                      <OPTION VALUE="Northern" selected> Northern
</OPTION>
                                           <!-- iterate over values in pick list
-->
                                    <OPTION VALUE="North-Eastern" > North-Eastern
</OPTION>
                                           <!-- iterate over values in pick list
-->
                                       <OPTION VALUE="Eastern" > Eastern </OPTION>
                                           <!-- iterate over values in pick list
-->
                                    <OPTION VALUE="South-Eastern" > South-Eastern
</OPTION>
                                           <!-- iterate over values in pick list
-->
                                     <OPTION VALUE="Southern" > Southern </OPTION>
                                           <!-- iterate over values in pick list
-->
                                    <OPTION VALUE="South-Western" > South-Western
</OPTION>
                                           <!-- iterate over values in pick list
-->
                                       <OPTION VALUE="Western" > Western </OPTION>
                                           <!-- iterate over values in pick list
-->
                                    <OPTION VALUE="North-Western" > North-Western
</OPTION>
                                           <!-- iterate over values in pick list
-->
```

```
                                        <OPTION VALUE="Central" > Central </OPTION>

                                 </SELECT>


                        <!--IF List Box-->

                            <!--IF Radio-->

                            <TD VALIGN="TOP" COLSPAN="2">

                        </TR>

                                  <!-- Loop for all parameters -->

                         <!-- If Parameter is NOT hidden -->

                        <TR>
                            <TD><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="5" BORDER="0"></TD>
                            <TD VALIGN="middle" COLSPAN="3"><IMG
src="/Brio/wsmedia/art/space.gif" width="20" height="5"></TD>
                        </TR>
                        <TR>
                            <TD COLSPAN="2"><IMG SRC="/Brio/wsmedia/art/space.gif"
WIDTH="45" HEIGHT="12" BORDER="0"></TD>
                                                                        <!-- Name of
parameter -->
                            <TD VALIGN="MIDDLE"><FONT face="Arial, Helvetica, sans-
serif" size="-1">Select a Quarter:</FONT></TD>

                            <TD VALIGN="MIDDLE" COLSPAN="2">

                            <!--IF Text Box-->

                        <!--IF Drop Down-->

                        <!--IF List Box-->

                            <!--IF Radio-->
                                    <!-- if parameter has a pick list -->

                                                <!-- iterate over values in pick list -->
                               <input type="Radio" name="Param_2" value="1"
checked>1<br>
                                                <!-- iterate over values in pick list -->
                               <input type="Radio" name="Param_2" value="2" >2<br>
                                                <!-- iterate over values in pick list -->
                               <input type="Radio" name="Param_2" value="3" >3<br>
                                                <!-- iterate over values in pick list -->
                               <input type="Radio" name="Param_2" value="4" >4<br>

                            <TD VALIGN="TOP" COLSPAN="2">

                        </TR>
```

```
                                <!-- Loop for all parameters -->

                        <!-- If Parameter is NOT hidden -->


                      <TR>
                          <TD><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="5" BORDER="0"></TD>
                          <TD VALIGN="middle" COLSPAN="3"><IMG
src="/Brio/wsmedia/art/space.gif" width="20" height="5"></TD>
                      </TR>
                      <TR>
                          <TD COLSPAN="2"><IMG SRC="/Brio/wsmedia/art/space.gif"
WIDTH="45" HEIGHT="12" BORDER="0"></TD>
                                                                  <!-- Name of
parameter -->
                          <TD VALIGN="MIDDLE"><FONT face="Arial, Helvetica, sans-
serif" size="-1">Select a Chart Style:</FONT></TD>

                          <TD VALIGN="MIDDLE" COLSPAN="2">

                          <!--IF Text Box-->

                      <!--IF Drop Down-->

                                  <!-- if parameter has a pick list -->

                                  <SELECT NAME="Param_3">

                                          <OPTION VALUE=""></OPTION>
                                              <!-- iterate over values in pick list
-->
                                         <OPTION VALUE="Bar" selected> Bar </OPTION>
                                              <!-- iterate over values in pick list
-->
                                          <OPTION VALUE="Line" > Line </OPTION>
                                              <!-- iterate over values in pick list
-->
                                          <OPTION VALUE="Pie" > Pie </OPTION>
                                              <!-- iterate over values in pick list
-->
                                         <OPTION VALUE="Stacked-Bar" > Stacked-Bar
</OPTION>

                                  </SELECT>

                      <!--IF List Box-->

                          <!--IF Radio-->

                          <TD VALIGN="TOP" COLSPAN="2">

                      </TR>
```

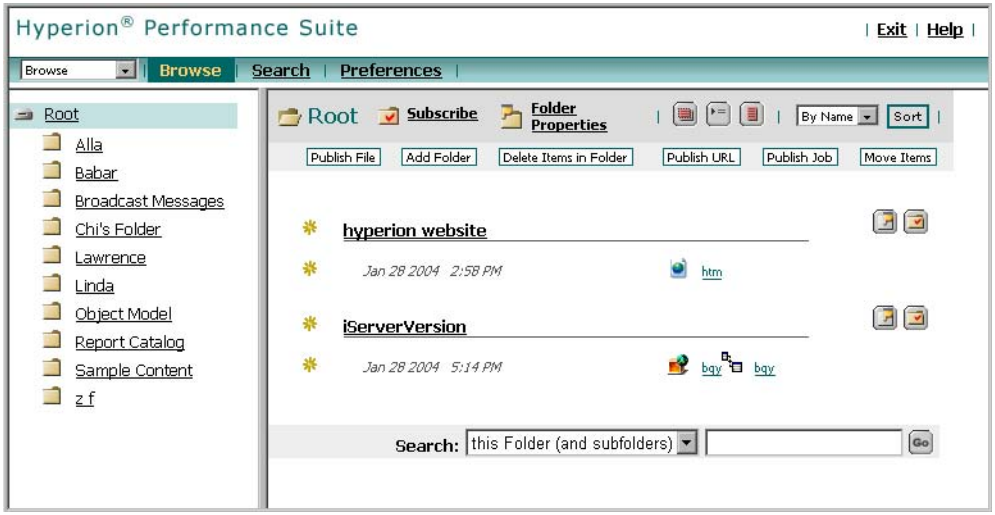
```
                                <!-- Loop for all parameters -->

                      <!-- If Parameter is NOT hidden -->

                     <TR>
                         <TD><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="5" BORDER="0"></TD>
                         <TD VALIGN="middle" COLSPAN="3"><IMG
src="/Brio/wsmedia/art/space.gif" width="20" height="5"></TD>
                     </TR>
                     <TR>
                         <TD COLSPAN="2"><IMG SRC="/Brio/wsmedia/art/space.gif"
WIDTH="45" HEIGHT="12" BORDER="0"></TD>
                                                                  <!-- Name of
parameter -->
                         <TD VALIGN="MIDDLE"><FONT face="Arial, Helvetica, sans-
serif" size="-1">Show in 3D:</FONT></TD>

                         <TD VALIGN="MIDDLE" COLSPAN="2">

                         <!--IF Text Box-->

                     <!--IF Drop Down-->

                     <!--IF List Box-->

                         <!--IF Radio-->
                                 <!-- if parameter has a pick list -->

                                             <!-- iterate over values in pick list -->
                            <input type="Radio" name="Param_4" value="YES"
checked>YES<br>
                                             <!-- iterate over values in pick list -->
                            <input type="Radio" name="Param_4" value="NO" >NO<br>

                         <TD VALIGN="TOP" COLSPAN="2">

                     </TR>

            <!-- End Display of Parameters -->

            <TR>
                <TD COLSPAN="4"><IMG SRC="/Brio/wsmedia/art/space.gif" WIDTH="45"
HEIGHT="12" BORDER="0"></TD>
            </TR>

    </TABLE>
```

Customizing the JavaScript Validation Routines

To redefine or modify validation routines for text-field parameters:

1 **In the Browse module, make sure that Reveal hidden items is on.**

On the Browse tab, displaying an item list, you can control whether hidden items display by use of the **Reveal hidden items** button. It is the right-most button at the top of an item list, just to the left of the sort-order drop-down list.



To check whether hidden items are displayed, hover the mouse pointer over this button. If the label that displays is *Conceal hidden items*, then they are currently displayed.

When hidden items are displayed, the *System* folder appears under the root folder.

2 **Navigate to and choose the System folder.**

3 **Choose the JavaScript file formValidation, and save this file to a local disk.**

Now you have an editable local copy of the file.

4 **Edit `formValidation.js` in the editor of your choice.**

Information necessary for editing the validation routines appears in this file .

5 **Save your changes.**

6 **In Browse, choose the Modify Properties button for `formValidation`.**

7 **In the Versions section, either replace the most recent version, or add a new version.**

To replace the most recent version:

a. Choose **Replace** next to the most recent version.

b. Choose **Browse**, and in the *Choose file* window, find and select your edited copy of `form Validation.js`.

c. Choose **Open**.

d. Choose **Replace**.

To add a new version:

a. Choose **Go** next to *Add another version of this file*.

b. Choose **Browse**, and in the *Choose file* window, find and select your edited copy of `formValidation.js`.

c. Choose **Open**.

d. Choose **Add Version**.

Glossary

access privileges The level of access—for example, view, modify, run, full control—that the publisher of an item grants to others; also, at what level other users or groups can access a user or group as well as what a user and members of a group can do.

actions Execution of a BQY job is defined in terms of a series of actions. Actions define the job output format.

adaptive states BQY level of permission. There are six levels of permission: view only, view and process. analyze, analyze and process, query and process, and datamodel and analyze.

bookmark A link to a Hyperion Performance Suite item or a web site, displayed on a Personal Page of a user. The two types of bookmarks are My Bookmarks and image bookmarks.

bounding rectangle The perimeter that encapsulates the BQY content when embedding BQY sections in a Personal Page. It is required by the Intelligence iServer to generate HTML and is specified in pixels for height and width or row per page.

BQY files or jobs Files created by the Hyperion Solutions's Intelligence products and published into the Repository as files or as jobs. Files and jobs have different capabilities.

BQY sections Divisions of a BQY file used to display and analyze information in different formats (for example, Chart Section and Pivot Section).

connection file See Open Catalog Extension (OCE) Files.

content Information stored in the Hyperion Foundation Repository. It includes report programs (jobs), report output, documents such as spreadsheets or word processing documents, images, HTML pages, files of any type, multiple versions of files, or URLs.

custom calendar Any calendar created by an administrator.

custom job parameter Unnamed job parameter created by you and associated with a specific schedule.

custom time event A time event created by you for one time use with a specific schedule.

cycle Used when scheduled BQY jobs need to process and produce different job output with one job run. Cycles are part of BQY job parameters.

default folder A user's home folder.

embedded section Sections from Hyperion Intelligence Products (Results, Tables, Pivots, Charts, and OLAP Results) can be embedded into a Personal Page. All embedded sections maintain live data content and formatting from the original section.

exception A condition or result (such as a threshold being reached) generated by an automated process, which requires some intervention or oversight. It can cause (a) the corresponding indicator on a subscribing user's Exceptions Dashboard to change, or (b) a notification to be sent to a user who has subscribed to it.

Exceptions Dashboard An optional content window used to monitor exceptions on Personal Pages. Add exception indicators to this dashboard. Each indicator represents one exception-capable report.

externally triggered events Non-time based events that are used to schedule job runs.

folders Items are organized into folders. Folders are similar to the directories or folders of your operating system, and are arranged in a hierarchical structure. A folder can contain subfolders, items, or both.

generic jobs All jobs except SQR and BQY jobs.

HTML See Hypertext Markup Language (HTML).

Hypertext Markup Language (HTML) A programming language used to create World Wide Web pages, with hyperlinks and tags that explain how to format the information on the screen.

image bookmarks Graphic links to web pages or Hyperion Performance Suite items.

Intelligence iServer Thin-client product used to interactively view BQY documents with a browser.

Intelligence Products A fully integrated business intelligence solution that provides powerful query, analysis, and reporting functionality across both client/server and web environments.

item A piece of content. An item can be a report program (job), report output, a document created in a spreadsheet or word processing application, an image, an HTML page, a file of any type, a set of versions of a file, or a URL. Every item possesses properties, which store extra information about the item.

jobs Executable objects; typically reports, programs, or scripts.

job output Files or reports produced from running a job.

job parameters The compile time and run time values necessary to run a job.

metadata Data about data; properties and options pertaining to particular content items or other resources (such as users).

MIME types Multipurpose Internet Mail Extension. Describes the format of data in an item (for example, an Excel spreadsheet or an SQR program) so that Hyperion Foundation knows which application to launch to open the object.

null value A value that is absent of data.

Open Catalog Extension (OCE) Files Tiles that encapsulate and store connection information used to connect Hyperion applications to a database. OCE files specify the database API (ODBC, SQL*Net, and so on), database software, the network address of the database server, and your database user name. Administrators create and publish OCE files.

personal job parameters Reusable, named job parameters that are accessible only to the user who created them.

Personal Pages Your personal window to information in Hyperion Foundation. You select what information to display, as well as its layout and colors.

personal recurring time events Reusable time events that are accessible only to the user who created them.

priority (schedule) Jobs scheduled to run at the same time are run in order of their priority.

properties Information about a file or other resource. For example, the Name or MIME Type of a file, or the User ID and Password of a user. (Also called *metadata.*)

public job parameters Reusable named job parameters created by your administrator and accessible to you with the requisite access privileges.

public recurring time events Reusable time events created by an administrator and accessible through the access control system.

publish To enter a file into the Hyperion Foundation Repository. The publisher uploads the file and sets its access control and other properties.

recurring time event An event that specifies a starting point and the frequency to run a job.

register *See* publish

Repository The file system and database where Hyperion Foundation content and metadata are stored.

retrieve Provides access to the SQR program source file. You can use this to view or modify the program.

schedules Specify the job you want to run, as well as the event schedule and job parameter list for running the job.

shortcut A link to an item elsewhere in Hyperion Foundation. Create a shortcut when, for example, you want an item to appear in folder A, though it is stored in folder B

SmartCut A link to an item in Hyperion Foundation, in the form of a special URL.

SPF files Printer-independent files created by the SQR server that contains a representation of the actual formatted report output, including fonts, spacing, headers, footers, and so on.

SQR A specialized programming language for data access, data manipulation, and reporting.

subscribe To register an interest in an item or folder, in order to receive automatic notification whenever the item or folder is updated.

time events Triggers for execution of jobs.

URL An address used by a web browser to find web pages.

variable A value that can be modified when you run a report.

web client Intelligence plug-in product that enables users to create queries, analyze data, and create reports through a browser.

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