Guide To Using
WebFOCUS
For
Run-Only Processing

WebFOCUS 9.X

NORTH CAROLINA AGRICULTURAL AND TECHNICAL STATE UNIVERSITY

WebFOCUS

WebFOCUS is an enterprise-level business intelligence (BI) and analytics platform that helps the university gain insights from its data. It offers tools for reporting, dashboards, data visualization, and ad hoc querying. With WebFOCUS, users can create interactive reports, design customized dashboards, and explore data through user-friendly interfaces. The platform supports a variety of data sources, including relational databases, spreadsheets, and web services.
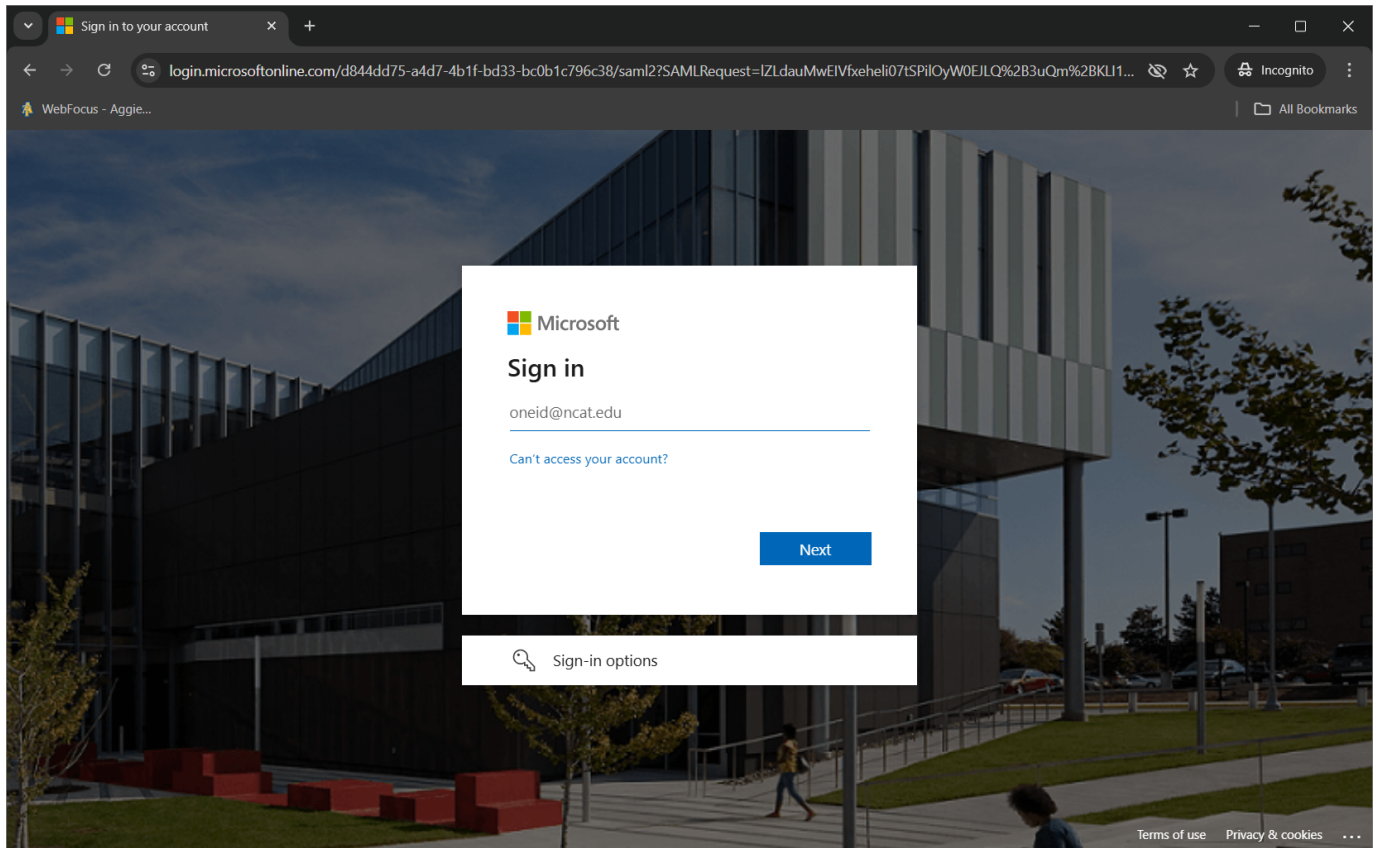
Accessing WebFOCUS

To use the WebFOCUS environment, **direct** your Web browser to https://hub.ncat.edu/administration/its/webfocus/index.php and **click WebFOCUS Login**.

Log in with your **OneId** and **Password.**

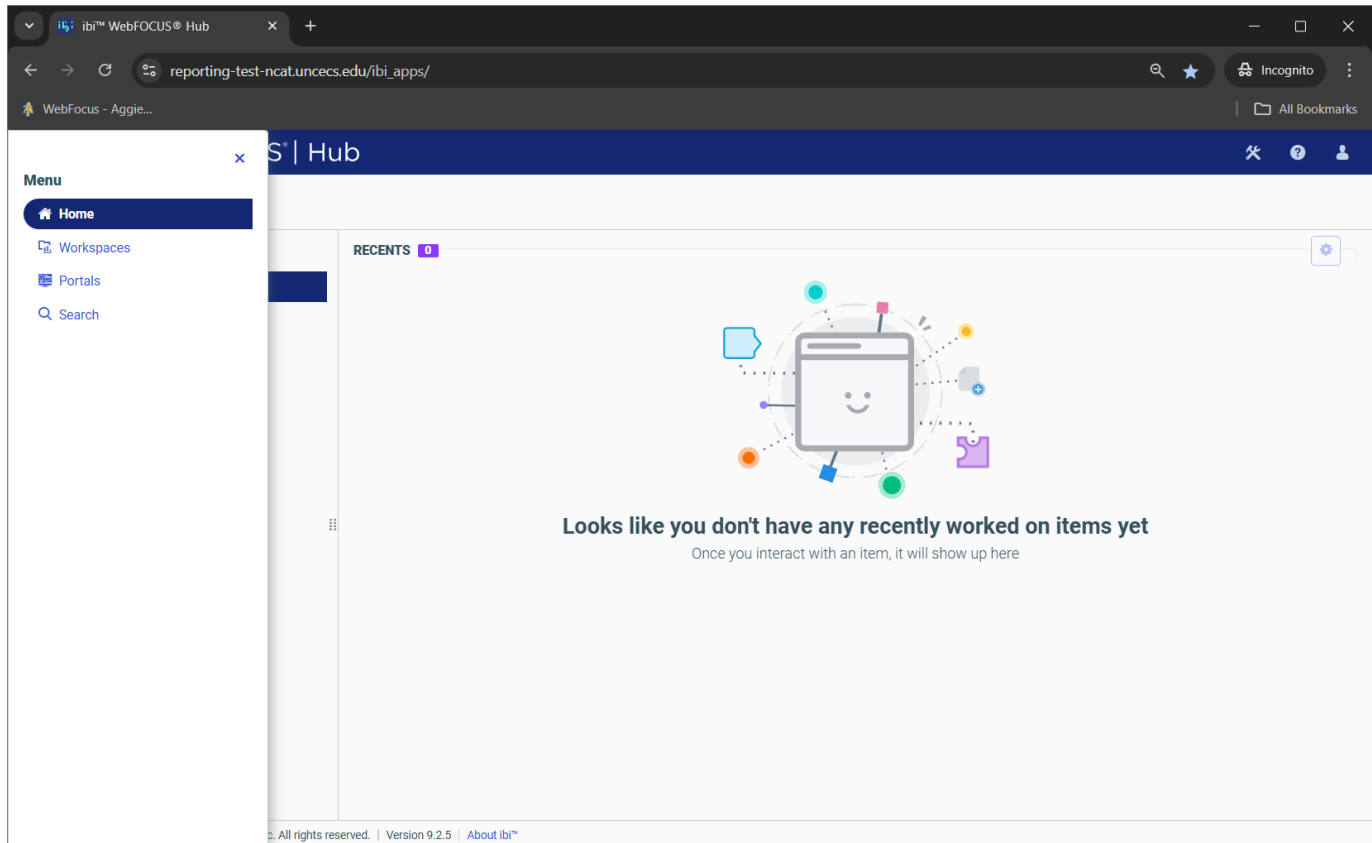**Note:** You must be VPN'd into the University network before you continue.

WebFOCUS Hub

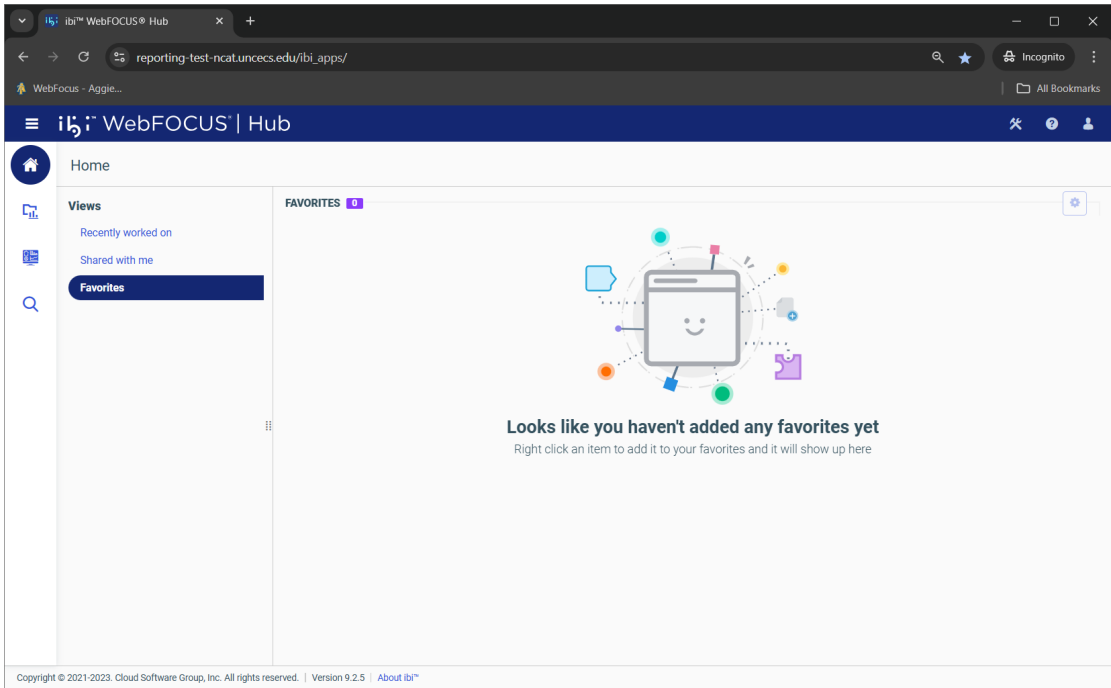The WebFOCUS Hub is the centralized location for all your work and development.

Content is accessible either via the upper-left hamburger menu or via the left-side icons.

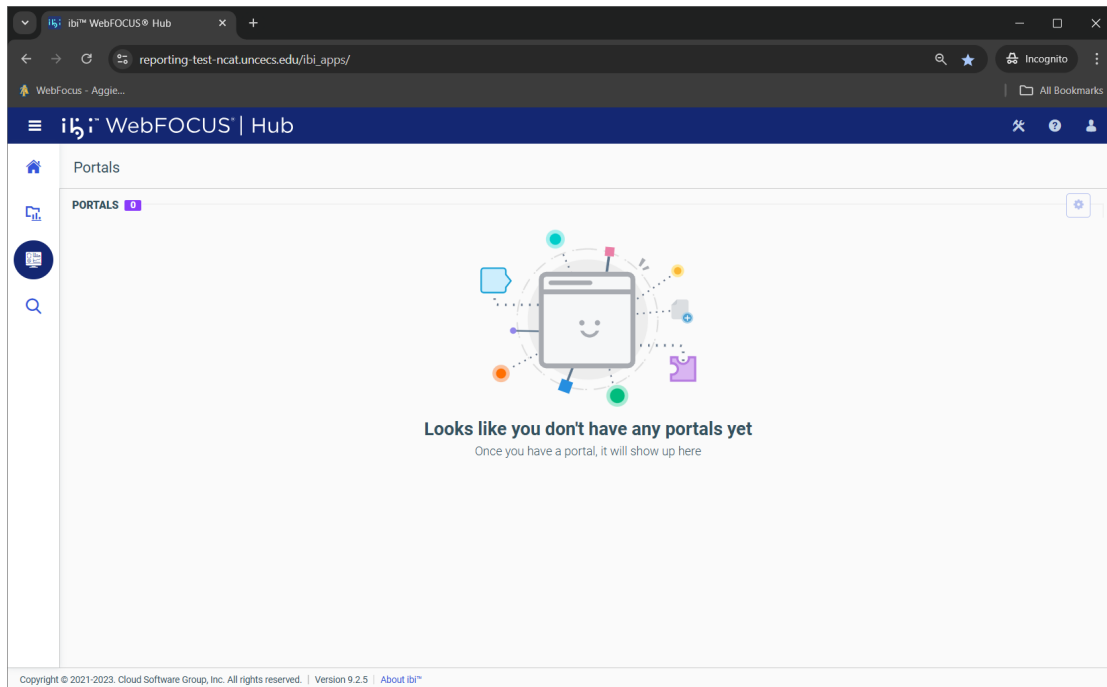**For Run-Only Users,** the typical options available are:
1. **Home**
2. **Workspaces**
3. **Portals**
4. **Search**

As you work through the environment, you will find reports that you use frequently. There is a feature called **favorites** that allows you to place a shortcut to those frequently used reports on your home screen. Below is a sample of that screen (with no reports). We'll add one later.

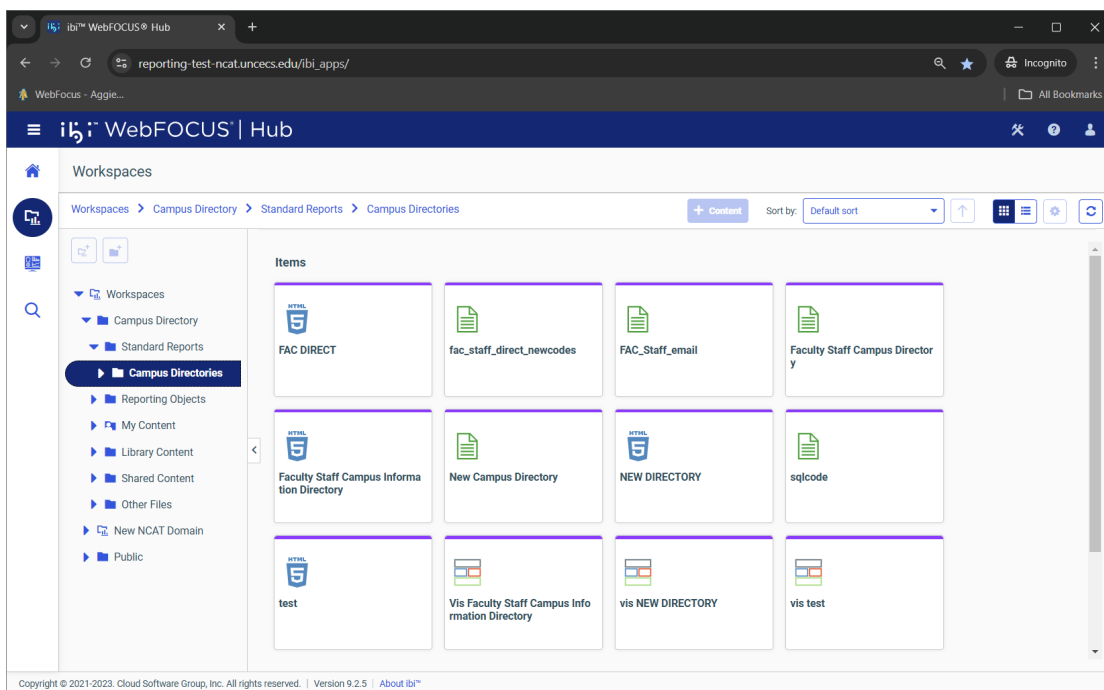If any portals (dashboards) are available, they are shown on the **Portals** icon.

The search feature will be discussed a little later.

Workspaces (aka domains)

These routinely represent the high level department structures of your organization.
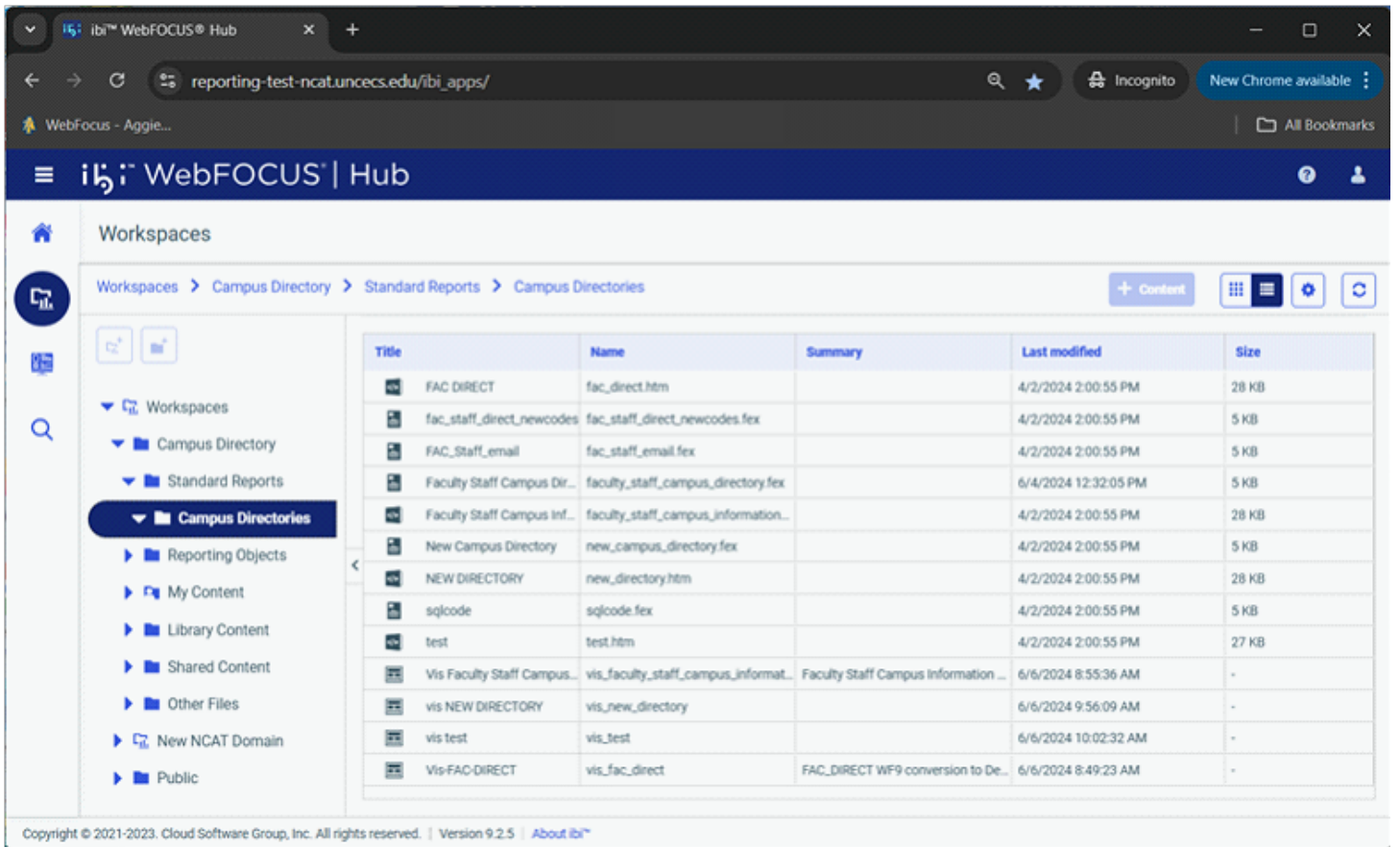

Standard Reports ~ a pre-defined procedure that is stored in a folder. Standard Reports are used to get data that changes on a regular basis. Each time a Standard Report is run, the output reflects the current data, while the format of the report stays the same.

My Content ~ a personal report area where you can save, run, or edit the report and no other users have those reports.
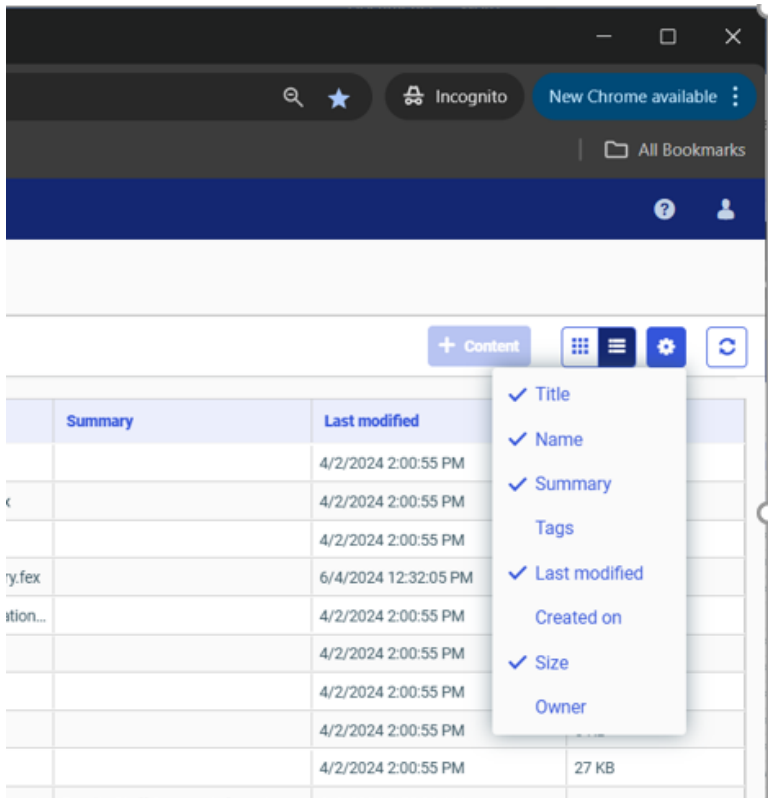
Shared Content ~ a report or custom report that another user has prepared and saved with the shared report feature.

Reporting Objects ~ a tailored view of a set of data that has been created and saved to a folder. The data in the reporting object is used to create personal reports quickly and in compliance with University guidelines.

You can switch from showing assets (reports, html pages, etc) in a panel or card view to a list view by clicking the icon next to the cog in the upper right corner. See below.
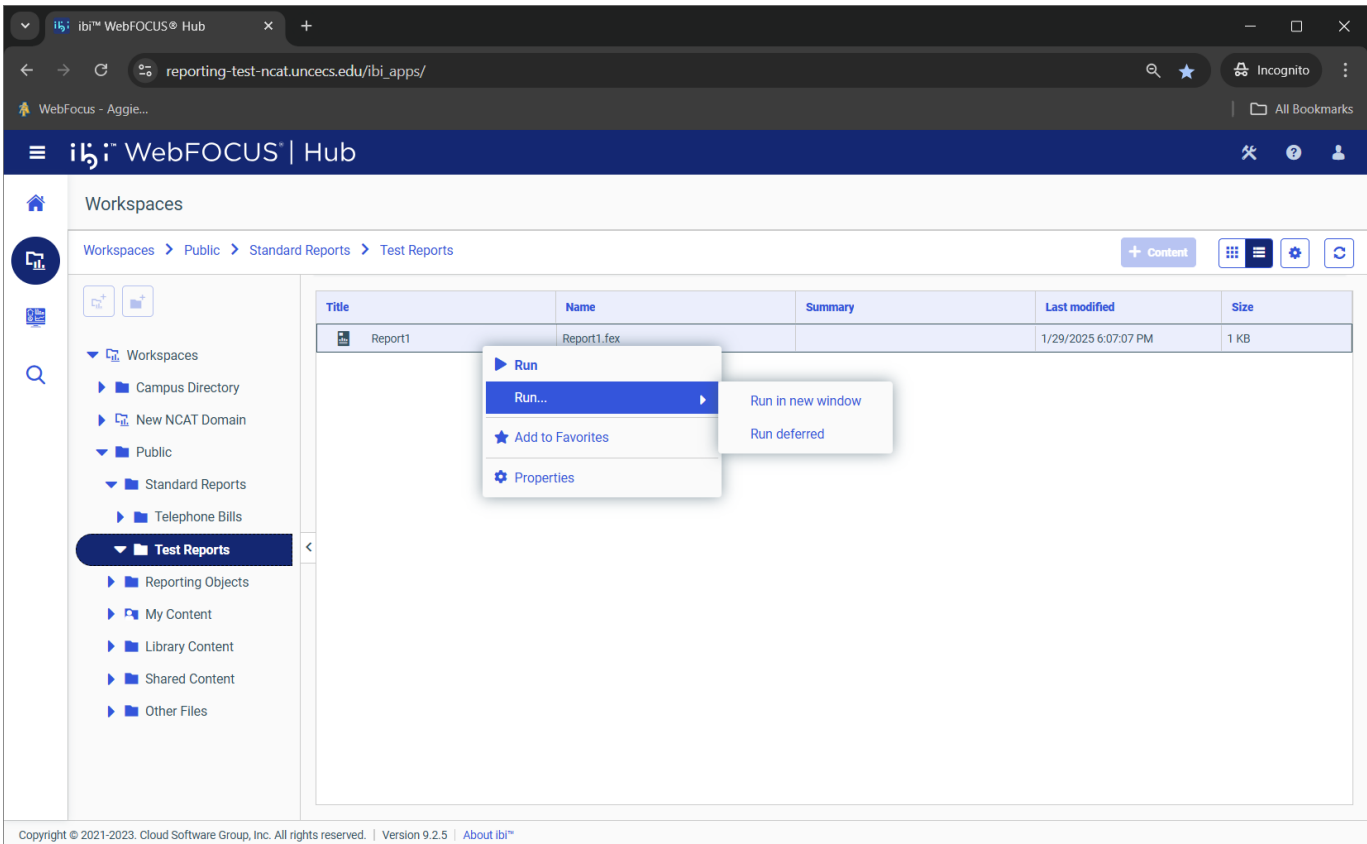

To modify the details of the columns shown, simply click the cog icon in the upper right and choose the details you want.

Running Reports

1. **Double-Click** <desired> report **OR**
2. **Right-Click** <desired> report and choose one of the available **Run options** from the menu

By default, a report runs in the same window. You can move it to a separate window by clicking the upper arrow icon at the upper right corner of the report window.
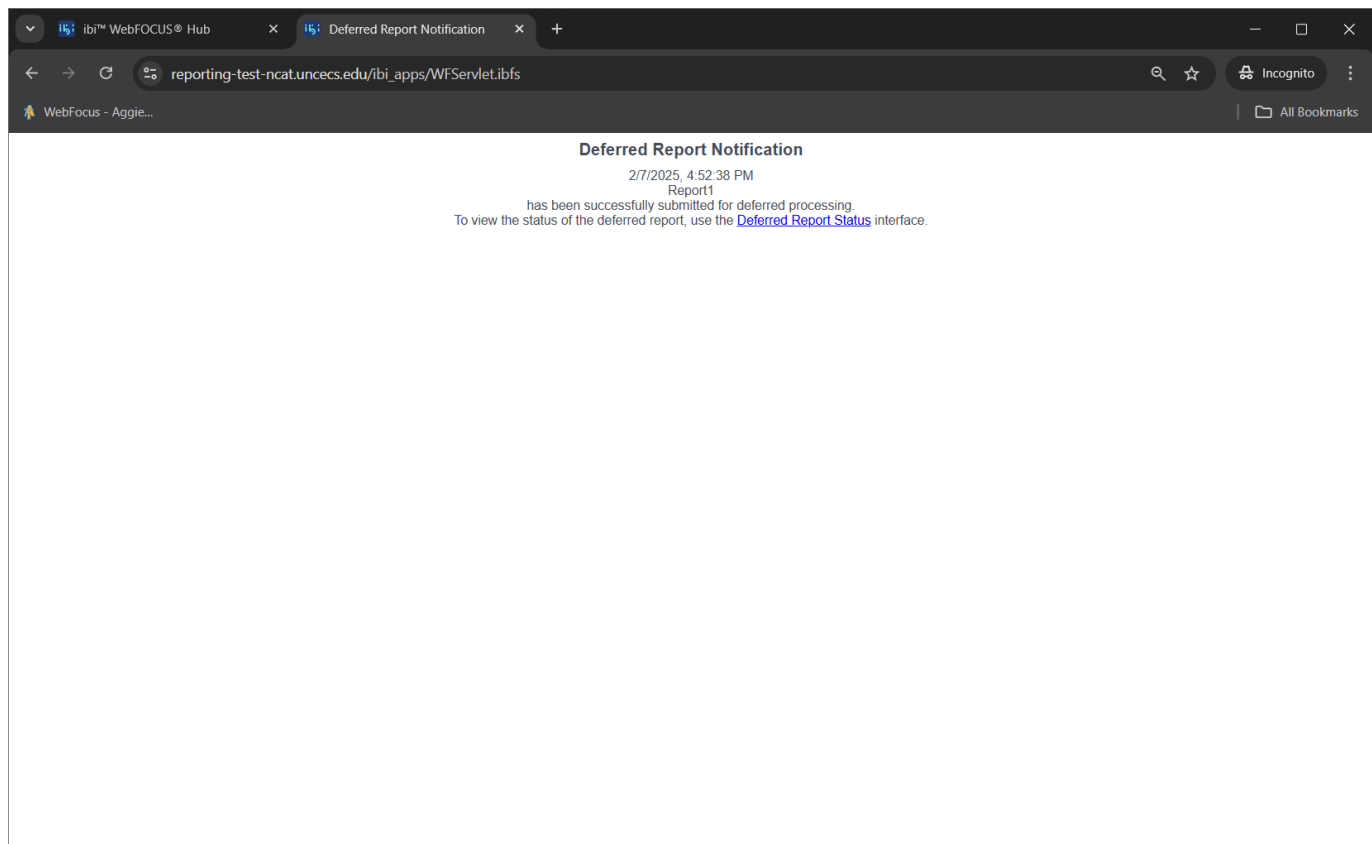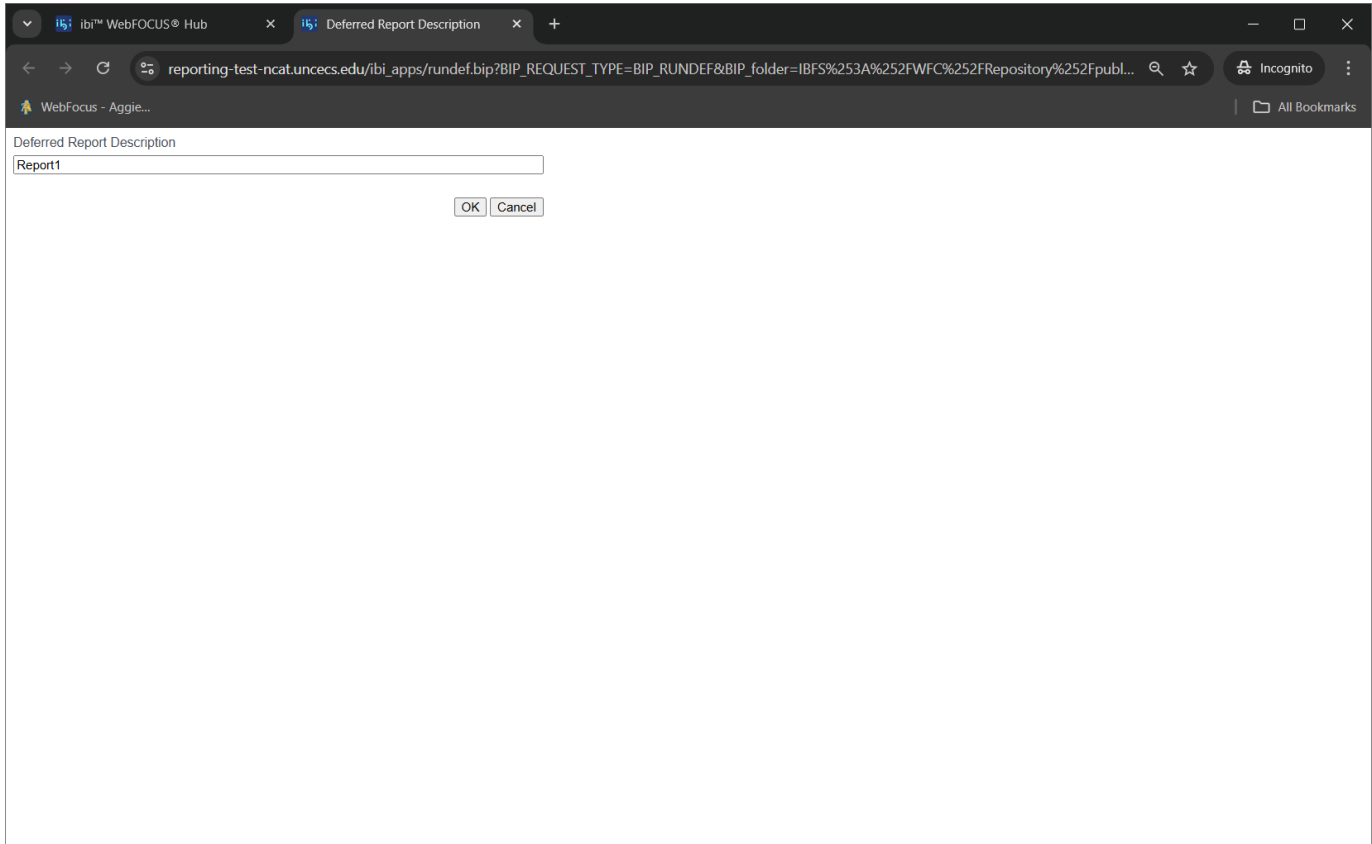
Running Reports Deferred

If you choose the **Run deferred** option, you will be taken to another screen asking for the report description. This option is for reports you know will take a long time to run. You can come back and retrieve these reports from the **Tools icon** at the top right of the main screen.
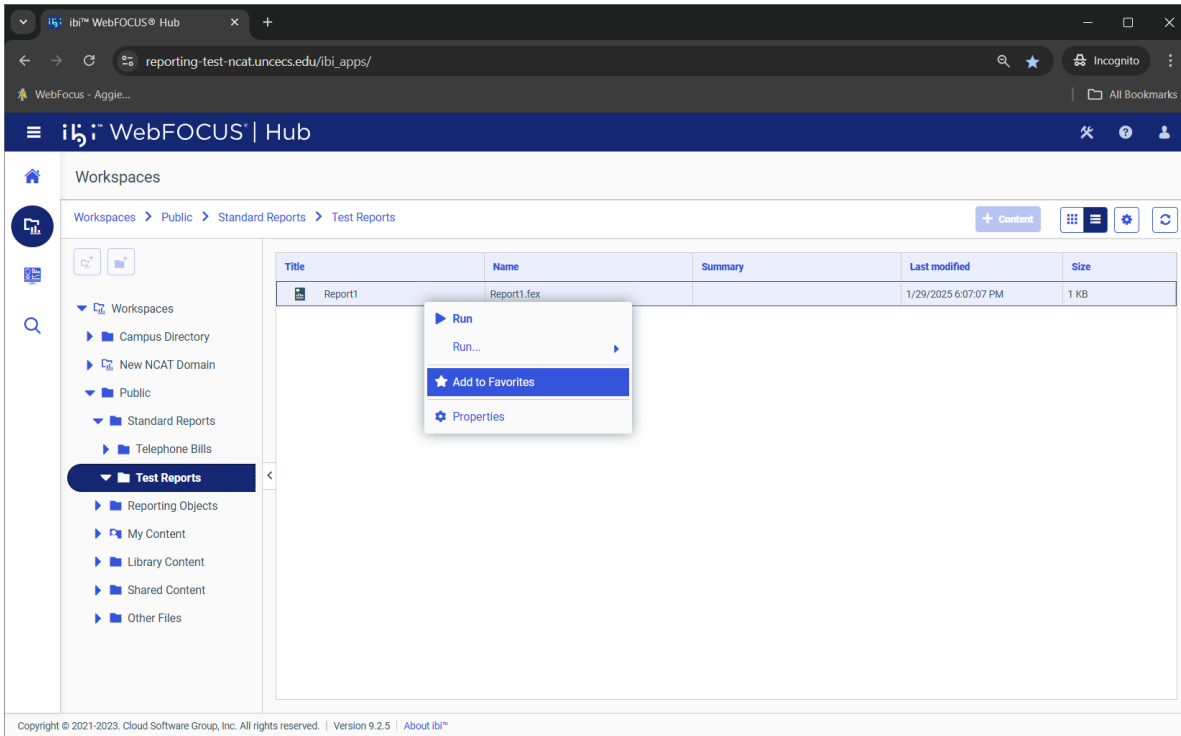

Close this browser tab when done. Click the **Tools icon** in the upper right corner of the main screen to check report status.
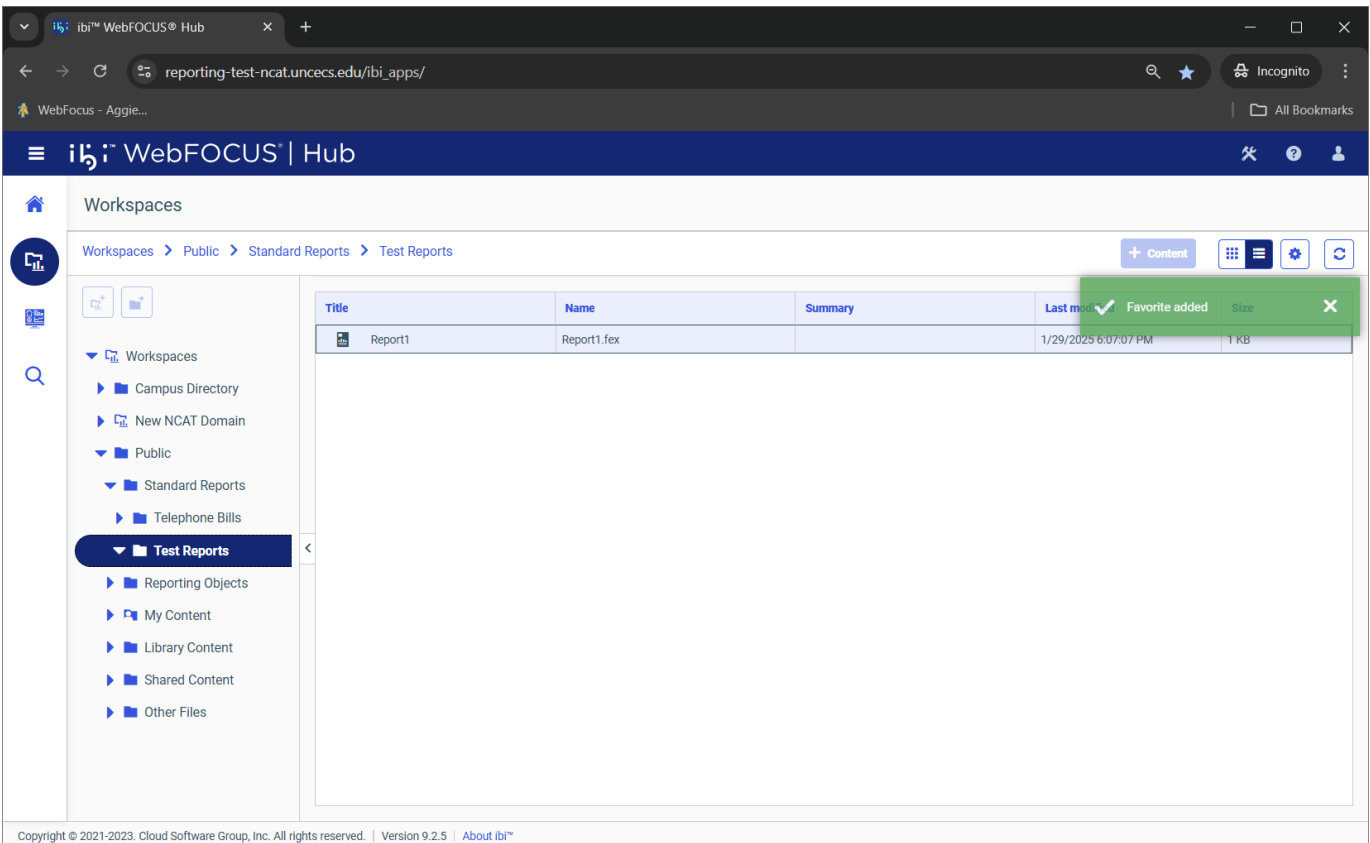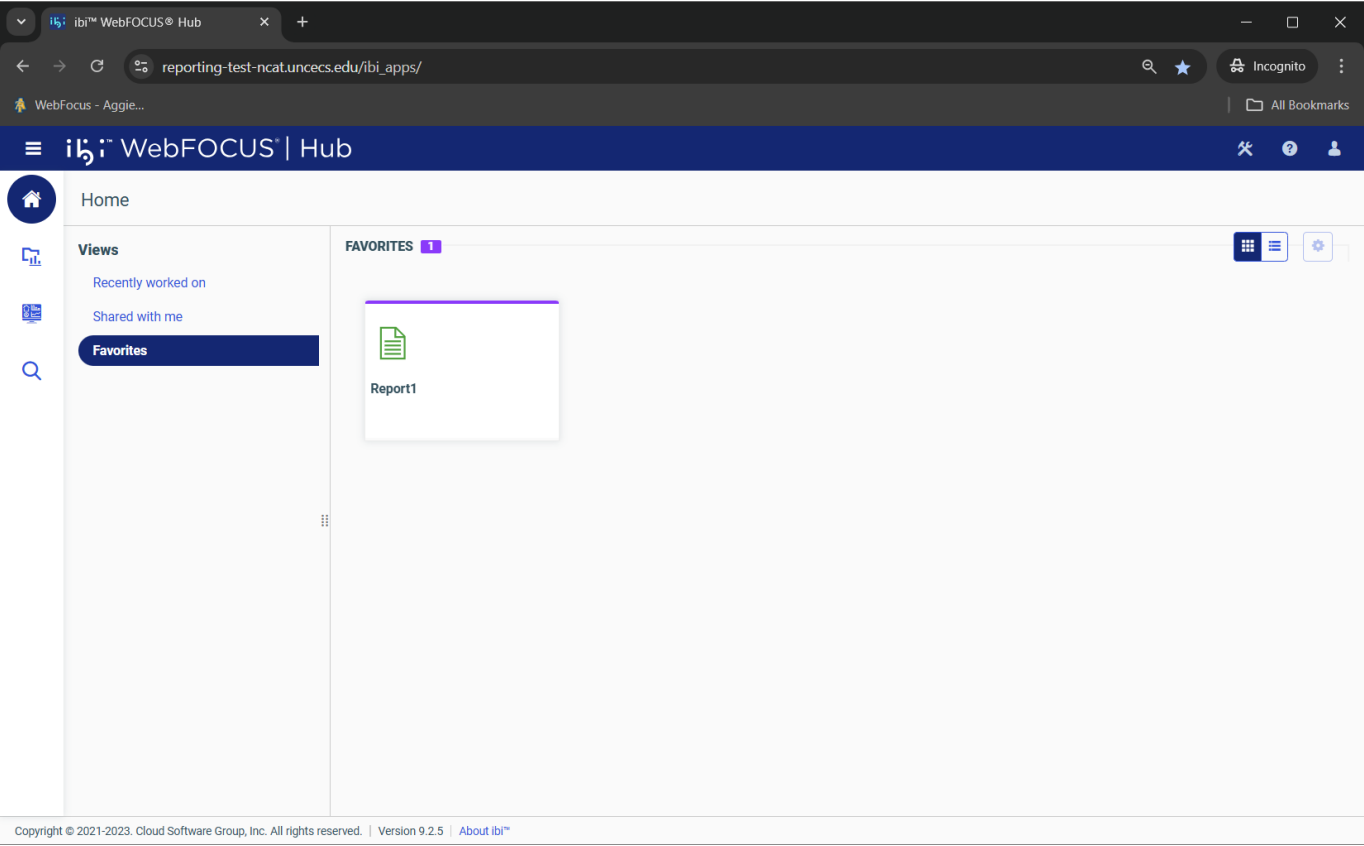
Favorites

Most items in WebFOCUS have the option **Add to Favorites** which adds this to your favorites secion on the Home screen.

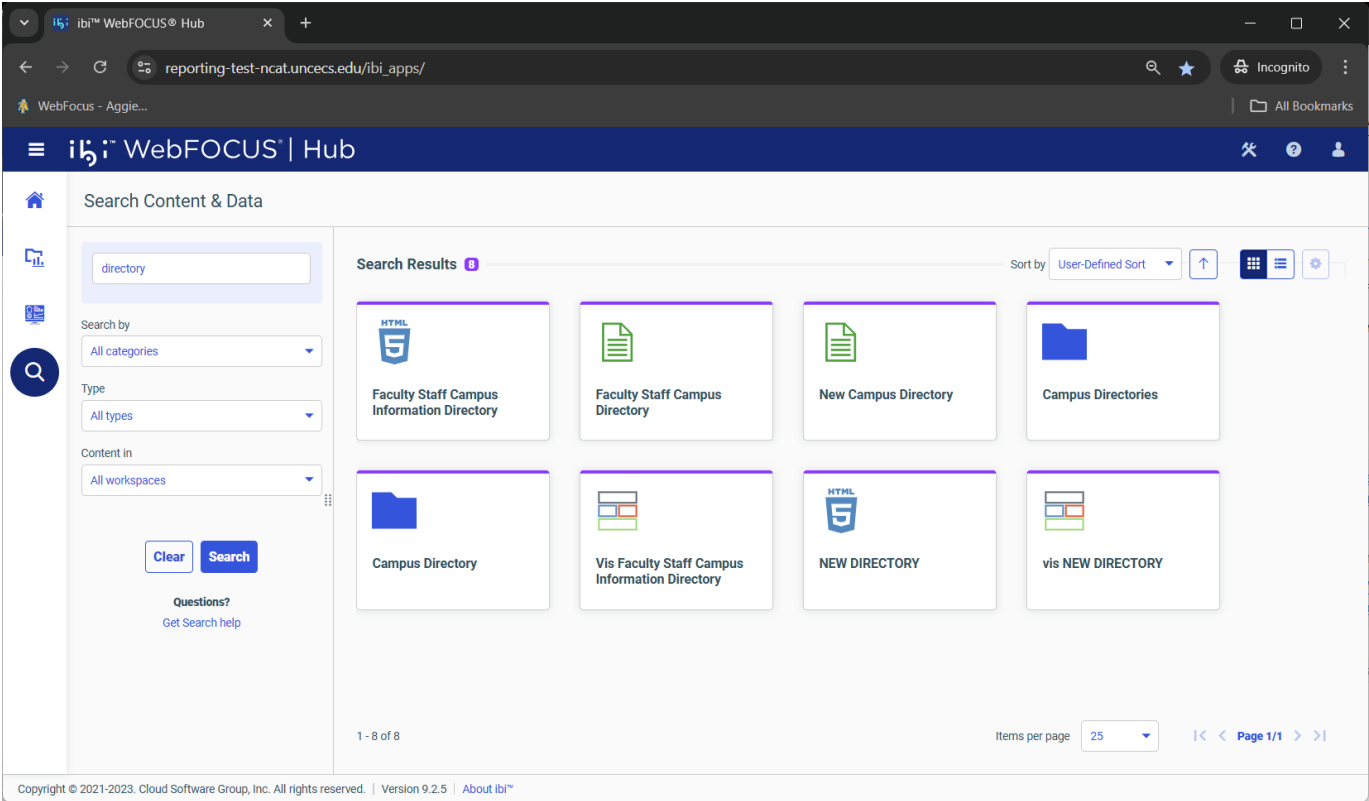Notice the message confirming the report has been added to favorites.

And returning to the Home screen we see that the **Favorites** section has been updated with the new report.
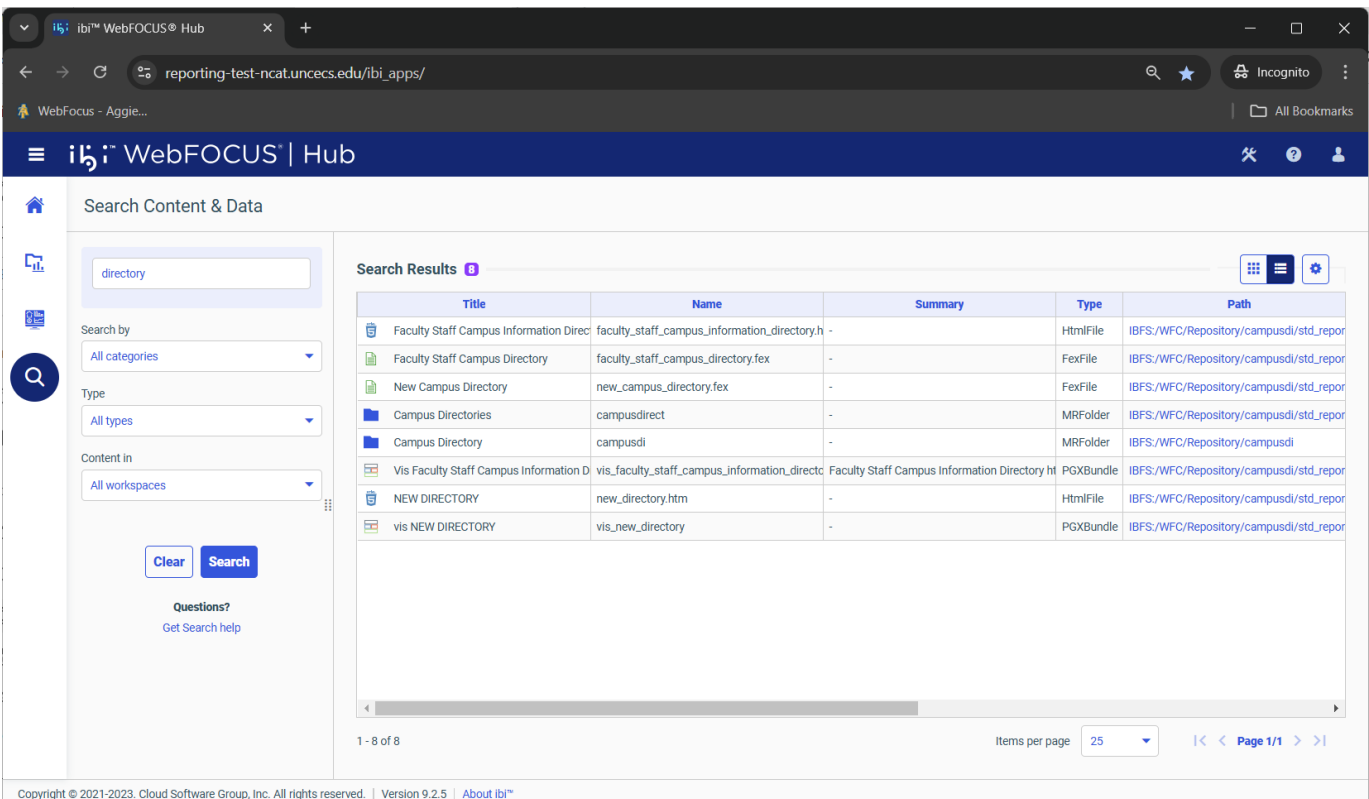
Search Content

The new version of WebFOCUS stores all reports, charts, portals, folders, etc in a database repository. Based on this, a new search capability has been provided to find content based on titles, filenames, summaries, etc. Natural language and fuzzy searches are supported.

In the simple example below, a simple search for the word **directory** is performed. This is across all areas this user has access to and across all object types.

A **panel view** is default, but for more details I switch to a **list view** on the following screen.

A really powerful feature of the search facility is the ability to utilize all the capabilities of the product directly from this screen.
You can:
- Run Reports
- Add items to your favorites
- Locate items (take you directly to the Workspace/subfolder where the items exists)
- Look at the detailed properties of items
- Find items that somewhat match what you are looking for (not exactly)

Exiting WebFocus

Be sure to Exit the Web FOCUS environment correctly!

1. **Click the person icon in the upper right corner**
2. **Click Sign Out**