



Click&DECiDE Business Application Intelligence

Administration Manager & Web Menu Manual

New Click&DECiDE 2018

64-bit

Last Edition December 10th, 2018

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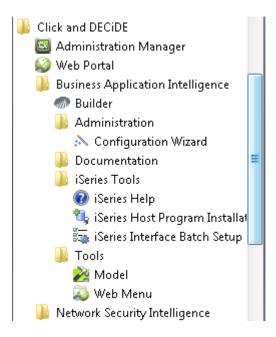




1. Starting with Click&DECiDE Administration Manager

1.1. Using the Click&DECiDE Start Menu

The Click&DECiDE Start menu displays the following modules. To display the Start menu click **Start> All Programs> Click and DECiDE**.



Administration Manager: click Administration Manager to launch the Administration Manager. The Administration Manager enables you to define and setup each data source you want to access. In the Enterprise Edition, the Administration Manager also enables you to define the Security when accessing data sources: User Groups, Users, Menus used in the Web Portal and the Authentication mode.

In the Express Edition, this command only allows to define and setup each data source you want to access.

Web Portal: click Web Portal to access your Click&DECiDE Web Portal. The Web Portal will be launched.

1.1.1. Using the Start Menu's Business Application Intelligence Folder

Builder: click **Builder** to launch the Click&DECiDE Builder. The Builder is the main program which enables you to start the application to create queries, reports and cross-tables, all saved in the same project with a ".wfv" extension.

Configuration Wizard: click **Configuration Wizard** to launch the Click&DECiDE Configuration Wizard again. You may choose to run the Configuration Wizard again in the following cases:

- If you need to change your license certificate.
- If you need to change the Web Portal Authentication mode.
- If you need to change your Mail Server name.
- If you need to change the SQL Server Authentication mode.





1.1.2. Using the Start Menu's Tools Folder

Model: click **Model** to launch the Click&DECiDE Model program (Enterprise Edition only). This program allows the Administrator to create end-user table views, with hidden fields, pre-defined joins, pre-prepared calculated fields and hidden criteria. Tables and columns can be renamed to make the names more user-friendly to the end user. A Click and DECiDE Model data source must be then created in the Administration Manager in order to make queries for a Model.

Web Menu: click **Web Menu** to launch the Click and DECiDE Web Menu program (Enterprise Edition only). This program allows the Administrator to create the Menus they want to publish via the Web Portal, according the User Groups defined in the Administration Manager.

1.1.3. Using the Start Menu's iSeries Tools Folder:

iSeries Help: click iSeries Help to open the Click and DECiDE iSeries Online Help.

iSeries Host Program Installation: click **iSeries Host Program Installation** to run the tools required to upload to the AS/400 Host Program.

iSeries Interface Batch Setup: click **iSeries Interface Batch Setup** to run the tools managing the rights for the Batch Facility. This is a specific feature for iSeries that must be prepared by the AS/400 Administrator.

1.1.4. Using the Start Menu's Documentation Folder

Products and Solution Data Sheets: click **Products and Solution Data Sheets** to product and solution documents on the Click& DECiDE web site.

Readme: click Readme to open the Readme file and read about the new features in the current version.

Technical Documentation: click **Technical Documentation** to open technical documents on the Click&DECiDE web site.

1.2. Launching the Administration Manager (Enterprise Edition)

If you have installed the Enterprise Edition, then if you click Administration Manager in the Click and DECiDE Start menu, the Click and DECiDE Administration Manager module will be launched. Click and DECiDE Administration Manager allows you to perform the following tasks:

- Add and configure each data source you need to access
- Manage Users and User Groups, and give them specific rights (new in version 2015!).
- Manage the Security for each data source that must be accessible according to the User Group
- Grant access to User Groups to predefined Web Menus.

To launch the Click&DECiDE Administration Manager click **Start> All Programs> Click and DECiDE> Administration Manager**.

Note: no login is required because, by default, the Windows Groups you belong to have been added to the Authorized Groups being able to run this program.

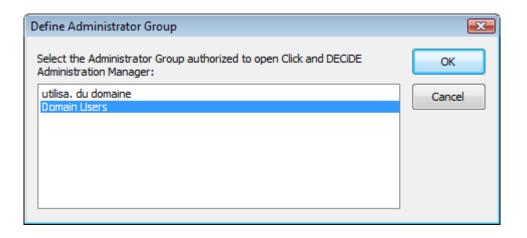
If the Server Computer does not belong to a Domain, the Setup procedure will treat the Local Groups. However, if the Server Computer belongs to a Domain, the Setup procedure will treat the Domain Groups.

1.3. Checking or Modifying the Administrator Group

To check or modify the Group authorized to open this program, please follow the steps below.



1. Select Tools> Set Administrator Group. The Define Administrator Group dialog box appears.



2. Select the Administrator Group authorized to open this program, and if necessary, create another specific Windows Administrator Group if necessary.

Important note: the above feature does not depend on the Web Portal Authentication Mode chosen when installing Click&DECiDE Enterprise Editions.

| Click and DECiDE Configuration | × |
|---|----------------------|
| Web Portal and Mail Configuration Select the authentication mode for the Web Portal and enter the server name used to send e-mail messages. | SMTP Click&DECiDE |
| Web Portal Authentication Mode Image: Windows Authentication Image: Click and DECiDE Authentication Mail Server (SMTP) Image: Ima | Options Iest |
| < <u>B</u> ack | Next > Cancel |

Contact us: E-mail: <u>support@clickndecide.com</u> Tel: +33 (0)4 67 84 48 00 Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France. To contact your nearest Click&DECiDE partner, <u>click here</u>.



Note: you can select either Windows Authentication or Click and DECiDE Authentication for the Web Portal when installing the software, however, this choice has no relation to the way the Click and DECiDE Administration Manager opens. Refer to the <u>Click&DECiDE BAI 2015 Setup User Guide</u>.

2. Using the Data Sources Tab (Enterprise Edition)

You must start by defining the data source you want to access. The Administration Manager allows you to add and setup a new configuration for each data source you need to access, manage <u>Users</u> and <u>User Groups</u>, manage the Security for the data sources that must be accessible depending on the User Group and give access to User Groups to predefined Web <u>Menus</u>.

| Security Click and DECiDE Administration Manager | | | | |
|---|---|--|--|--|
| Erile Edit View Tools Help | | | | |
| i 🖸 i 🕺 🗈 🛍 💙 🗠 🞯 i 🚣 🎘 🔊 | i 🖸 i 🔏 🖻 🛍 🔊 🝽 🞯 i 🏂 🎘 🏹 🐺 🖏 | | | |
| Data Sources | Data Source: SQL Server | | | |
| | Name : Secured SQL Server Properties | | | |
| Local SQL Secured SQL MyAS400 Server Server | How Should Click and DECiDE Client Connect To SQL Server? | | | |
| | Using Windows Authentication | | | |
| | Identification | | | |
| | User ID: | | | |
| | Password: | | | |
| | Confirmation: | | | |
| | Data Source Secured by Click and DECiDE | | | |
| | Click and DECiDE Security | | | |
| | Locked Access: Password Checked by the Data Source: | | | |
| | Max number of simultaneous connection: | | | |
| | | | | |
| | | | | |
| 📔 Data Sources 🤮 User Groups 🤱 Users 🗮 Menu 🦻 Authentications | | | | |
| Ready | CAPS NUM SCRL; | | | |

2.1. Modifying an Existing Data Source

To modify an existing data source, please follow the steps below.

- 1. Select the Data Sources tab.
- 2. Right-click the Data Source you want to modify. For example, the Data Source Local SQL Server.
- 3. Select Properties (or select File>Properties) to display the Settings dialog box.





| Microsoft SQL Server Interface - Settings | |
|--|--------------|
| Server Name .\SQLEXPRESS | OK Cancel |
| ✓ Support for decimal and numeric data type ✓ Alphanumeric Data on Server is stored with ✓ TCP/IP Connection | |

- 4. Specify the Server Name or Server Name\Instance Name for the SQL Server you want to access.
- 5. Select the appropriate check boxes.
- 6. Click OK.
- 7. Select the connection modes for an SQL data source (if appropriate) in the right pane.

| How Should Click and DECiDE Client Connect To SQL Server? | |
|---|---|
| Using Windows Authentication | - |
| Using A Unique SQL Server Authentication Profile | |
| Using Windows Authentication | |
| Using User Client Provided Profile (or Click and DECiDE Secured Password) | |

Windows Authentication: no Identification login is required.

| Data Source: SQL Server | | | |
|---|--|--|--|
| Name : Local SQL Server Properties | | | |
| How Should Click and DECiDE Client Connect To SQL Server? | | | |
| Using Windows Authentication 🔹 | | | |
| Identification | | | |
| User ID: | | | |
| Password: | | | |
| Confirmation: | | | |

Unique SQL Server Authentication Profile: this can be used if your SQL Server database security has been configured in Dual Mode and you wish to use an identified connection. Enter the User ID, Password and confirm the password. Note: the end user does not need to know the Database password, they only need to be identified.



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| Data | Data Source: SQL Server | | | |
|------|---|------------|--|--|
| | Name : Local 9 | Properties | | |
| | How Should Click and DECiDE Client Connect To SQL Server? | | | |
| | Using A Unique SQL Server Authentication Profile | | | |
| | Identification | | | |
| | User ID: | sa | | |
| | Password: ••••• | | | |
| | Confirmation: | ••••• | | |
| | | | | |

User Client Provided Profile (or a Click&DECiDE Secured Password): If you want the user to enter their personal SQL Server Client Login (or a Click&DECiDE Secured Password), then you must have selected Click and DECiDE Authentication when you ran the Configuration Wizard. In this case each user must be defined in the Administration Manager User Tab with a specific password. No Identification login is required now, but the user will be prompted to enter their client user login each time they connect to this data source later.

| Data Source: SQL Server | | | |
|-------------------------|---|------------|--|
| Name : | Local SQL Server | Properties | |
| C | How Should Click and DECiDE Client Connect To SQL Server? | | |
| - Identifica | | | |
| User ID: | | | |
| Passwor | rd: | | |
| Confirma | ation: | | |

- 8. Right-click the data source.
- 9. Note the following options available in the context menu.

| Local Serv | | |
|---------------|-----------------|--|
| Ser | Test Connection | |
| | Delete | |

Test connection: the connection will use the defined mode and only ask you to login if the **Using User Client Provide Profile** option was selected.

Delete: removes this data source.

10. Press **F2** if you want to change the data source name.



11. Click File> Update Security or the corresponding icon 4 to update the Administration Manager configuration after each modification.

2.2. Creating a New Data Source

You can create a new data source in the Data Sources tab, to do so please follow the steps below.

- 1. Right-click in the central pane of the Administration Manager.
- 2. Click New Data Source or select File> New> Data Source. The New Data Source dialog box appears.

| New Data Source | x |
|---------------------------------|--|
| Data Source Name: | OK Cancel |
| nee ADO Multi Dimensional (MDX) | , Oracle, DB2-UDB etc.) ed first. If this module is |
| | ssing file may be |

- 3. Note that each type of Data Source will display a specific dialog box where you can define the configuration.
- 4. Click each tab to configure the options according to the data source you want to use.
- 5. Note that for some Data Sources such as SQL Server, Oracle or UDB-DB2, you need the proprietary client module to be installed first. If not, an error message will appear as it is trying to connect to the missing client module.

2.2.1. Configuring an SQL Server Data Source

To configure an SQL Server Data Source, follow the steps below.

- 1. Right-click in the central pane of the Administration Manager.
- 2. Click New Data Source or select File> New> Data Source. The New Data Source dialog box appears.
- 3. Enter a Data Source Name, for example MySQLServer.





4. Select the **SQL Server** Data Source.

| New Data Source | ~ |
|-------------------|--------|
| Data Source Name: | ОК |
| MySQLServer | Cancel |
| Data Source: | |
| SQL Server 🔻 | |

- 5. Click **OK**. The **Settings** dialog box appears.
- 6. Enter the **Server Name** and if appropriate the Instance Name. For SQL Server 2008 installed with the Click&DECiDE package, the Instance name is SQLExpress. (.\SQLExpress can be entered).

| Microsoft SQL Server Interface - Settings | × |
|---|----------|
| Server Name | ОК |
| SQLServerName\SQLEXPRESS | Cancel |
| Support for decimal and numeric data type in write mode | |
| $\overline{\mathbb{V}}$ Alphanumeric Data on Server is stored with the ANSI character set | |
| TCP/IP Connection | |
| SQL Azure | |
| Native Client Version | |
| Automatically selected (2008, 2012, 2014, 2005) | |
| | |

- 7. Select the check boxes as appropriate.
- 8. The SQL Server version can be specified or is automatically selected.
- 9. Click OK.

2.2.2. Configuring an iSeries Data Source

To configure an iSeries Data Source, follow the steps below.

- 1. Right-click in the central pane of the Administration Manager.
- 2. Click **New Data Source** or select **File> New> Data Source**. The **New Data Source** dialog box appears.
- 3. Enter a **Data Source Name**, for example MyAS400 for a new iSeries Data Source.
- 4. Select the iSeries TCP/IP data source from the **Data Source** drop-down menu.



| New Data Source | x |
|--|---|
| Data Source Name: MyAS400 | OK Cancel |
| Data Source: | |
| iSeries TCP/IP 🗸 🗸 | |
| SQL Server iSeries TCP/IP | |
| ODBC Click and DECIDE Connect Click and DECIDE Model Excel | |
| Wa Web Service net ADO Multi Dimensional (MDX) not OLEDB (MDX and other) dist SAP WebMenu Google BigQuery | , Oracle, DB2-UDB etc.) ed first. If this module is ssing file may be |

- 5. Click OK. The iSeries TCP/IP Interface property sheet appears.
- 6. Enter the iSeries Name or IP address.

| iSeries TCP/IP Interface | × |
|---|------------------|
| iSeries TCP/IP RDB Name Character Set Date Format | Library list 🔹 🔺 |
| | Validate |
| iSeries Name or IP address : | |
| 192.168.0.103 | 2 |
| Internet Connection | |
| | |
| OK Cancel Apply | Help |

- 7. Select the RDB Name tab.
- 8. Enter the Relational Database Name (RDB Name).





| iSeries TCP/IP Interface | × |
|--|------------------|
| Series TCP/IP RDB Name Character Set Date Format | Library list 🚺 🔺 |
| Relational Database Name (RDBNAME): | Validate |
| OK Cancel Apply | Help |

- 9. Click Validate. The connection will be tested.
- 10. Note that once the connection has been successfully tested, the new iSeries data source is ready to use.

Note: for this data source, the Host Program Installation should be run before creating this data source.

| | Data Source: AS/400 TCP/IP | |
|-------------------------------|---|------------|
| MyAS400 Secured SQL Server | Name : MyAS400 Use a unique User ID/Password by default. | Properties |
| | User ID: QSECOFR | |
| | Password: |] . |
| | Confirmation: |] |
| | Data Source Secured by Click and DECiDE | |

- 11. Right-click the MyAS400 icon in the central pane.
- 12. Click Test Connection. The default login will be used. Note: if this data source must be used later via the Web Portal, you must activate the Data Source Secured by Click and DECiDE option. End users will be then able to connect to this AS/400 Data Source without knowing the iSeries Login, but using their Windows Login (if Windows Authentication has been selected) or using a predefined login declared in the Click and DECiDE Administration Manager if Click and DECiDE Authentication has been selected).





| Data | Source: AS/400 | TCP/IP | |
|------|---|-------------------------|------------|
| I | Name: MyAS400 | I | Properties |
| l | Use a unique User ID/Password by default. | | |
| | User ID: | QSECOFR | |
| | Password: | ••••• | |
| | Confirmation: | ••••• | |
| [| Data Source Secu - Click and DECiD | red by Click and DECiDE | V |
| | Locked Access: | Loccumy | |
| | Password Check | ed by the Data Source: | |
| | Max number of s | imultaneous connection: | |

2.2.3. Configuring an Oracle Data Source

Important: for some Data Sources such as Oracle, the version 2015 of Click&DECiDE does not provide any more a native data source. The only solution consists of using now an ODBC Oracle driver 64-bit.

If you are using queries made with the previous Click&DECiDE Native Oracle Data Source (32-bit) you will need to configure the ODBC Oracle 64-bit as follow:

- 1- Select the Access Join Style instead of the Oracle Join Style in the ODBC Interface Setup.
- 2- You can add the following rows in the DDIDOBC.INI file to make it working using the Native Oracle formulas instead of the Standard ODBC formulas:

[ODBC Oracle] FCT=fctora.fn

- 3- You can add the following rows in the DDIDOBC.INI file to get the Tables Descriptions and Columns Description:
- 4- [ODBC Oracle]

Tables=SELECT * FROM (SELECT DISTINCT ", T1.OWNER,T1.TABLE_NAME,'TABLE',T2.COMMENTS FROM SYS.ALL_TABLES T1 LEFT OUTER JOIN SYS.ALL_TAB_COMMENTS T2 ON T1.OWNER=T2.OWNER AND T1.TABLE_NAME=T2.TABLE_NAME UNION SELECT DISTINCT ", T1.OWNER, T1.VIEW_NAME, 'VIEW', T2.COMMENTS FROM SYS.ALL_VIEWS T1 LEFT OUTER JOIN SYS.ALL_TAB_COMMENTS T2 ON T1.OWNER=T2.OWNER AND T1.VIEW NAME=T2.TABLE NAME) WHERE OWNER LIKE '%2' AND TABLE NAME LIKE '%3' **ORDER BY 1.2** Columns=SELECT ",T1.OWNER SCHEMA_NAME,T1.TABLE_NAME,T1.COLUMN_NAME, decode(data_type, 'DATE',11,'FLOAT',6,'BINARY_FLOAT',6,'BINARY_DOUBLE',8, 'LONG RAW',-4,'LONG',-1,'CLOB',-1,'NCLOB', -10,'BLOB',-4,'BFILE',-4,'CHAR',1,'NCHAR', -8, 'VARCHAR2',12, 'NVARCHAR2',-9,'NUMBER', (CASE WHEN T1.DATA_PRECISION IS NULL THEN 8 ELSE 3 END), 'TIMESTAMP',11,'TIMESTAMP(0)',11,'TIMESTAMP(3)',11, 'TIMESTAMP(6)',11,'TIMESTAMP(9)',11,12) DATA_TYPE_ID, T1.DATA_TYPE

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DATA_TYPE_NAME, CASE data_type when 'NUMBER' THEN NVL(T1.DATA_PRECISION, T1.DATA_LENGTH) ELSE T1.DATA_LENGTH END COLUMN_SIZE, T1.DATA_LENGTH BUFFER_LENGTH_wrong,T1.DATA_SCALE DECIMAL_DIGITS_for_numbers, T1.DATA_PRECISION NUM_PREC_RADIX, CASE NULLABLE WHEN 'N' THEN 0 ELSE 1 END NULLABLE,NVL(T2.COMMENTS, ' ') COLUMN_DEF, T1.COLUMN_ID POSITION FROM SYS.ALL_TAB_COLUMNS T1 LEFT OUTER JOIN SYS.ALL_COL_COMMENTS T2 ON T1.OWNER=T2.OWNER AND T1.TABLE_NAME=T2.TABLE_NAME AND T1.COLUMN_NAME=T2.COLUMN_NAME where T1.OWNER='%2' and T1.TABLE_NAME='%3' ORDER BY T1.COLUMN_ID

2.2.4. Configuring an ODBC Data Source

To configure an ODBC Data Source, follow the steps below.

- 1. Right-click in the central pane of the Administration Manager.
- 2. Click **New Data Source** or select **File> New> Data Source**. The **ODBC Interface Setup** dialog box appears.
- 3. Select an **ODBC Data Source**.

| ODBC Interface - Setup | X |
|---|--------------|
| ODBC Data Source | OK Cancel |
| Supported Join Style Regular Only SQL/400 Access Oracle SQL Server | ODBC Setup |
| TimeStamp format {ts 'yyyy-mm-dd HH:MM:SS'} | |
| Advanced (use carefully, especially for server datasources) Image Schema / Name levels Image Also manage Catalog level if driver supports it Image Requires use of field index in GROUP BY clause for expressions Image Catalog Intervention Control of the server server datasources) | |

4. Click **ODBC Setup** to create or modify the ODBC Data Source Setup.



<u>Recommended</u>: the data source should be defined in the **System DSN** Tab, rather than the **User DSN** Tab, if you wish this data source to be able to be used not only locally on the Server but also from remote workstation through the Web Portal or using a Click&DECiDE Connect data Source.

| 🐺 ODBC Data Source Administrat | tor ? 💌 |
|--|--|
| User DSN System DSN File DSN | N Drivers Tracing Connection Pooling About |
| <u>S</u> ystem Data Sources: | |
| Name | Driver Add |
| Data Select Server Database 1.2 Data Set Vision CSV DestExcel DSDB12CLI Licences Licences V6 mysqlodbc | Microsoft Access Driver (* Microsoft Text Driver (*.txt Microsoft Excel Driver (*.xt Driver do Microsoft Access Driver do Microsoft Access Driver da Microsoft para ar MySQL ODBC 5.1 Driver |
| | e source stores information about how to connect to vider. A System data source is visible to all users ling NT services. |

- 5. Click **Configure** to define the ODBC setup as appropriate, according to the database type.
- 6. Go back to the **ODBC Interface Setup** dialog box.
- 7. Select the Join Style.

Regular Only: will only support Join Type #1 corresponding to the first option in the Click&DECiDE Builder **Join Properties** dialog box.

| Join Properties | |
|---|--------------|
| Join Criteria Join Type Only include rows where the joined fields from both tables match the join criteria. | OK Cancel |

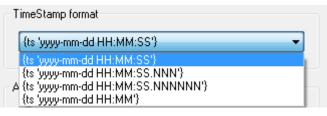
SQL Server: will support all proposed Join Types in the Click&DECiDE Builder Join Properties dialog box:





| Jo | oin Prop | perties | X |
|----|---------------|---|--------------|
| | Join Criteria | | OK Cancel |
| | <u>0 1</u> | Only include rows where the joined fields from both tables match the join criteria. | |
| | © <u>2</u> | Include all the records from 'Sales' and only those records from 'Salesman' where the joined fields match the join criteria. | |
| | © <u>3</u> | Include all the records from 'Salesman' and only those records from 'Sales' where the joined fields match the join criteria. | |
| | <u>6</u> | Include all the records from 'Salesman' and all the records from 'Sales'. | |

8. Select the Timestamp format: that corresponds to your ODBC Database from the drop-down list.



 Select the Advanced check boxes as appropriate. For example, the way to display table levels or to manage the GROUP BY statement.

2.2.5. Configuring an Excel Data Source

An Excel data source is an ODBC data source, however, you can very easily add an Excel data source by following the steps below.

Note: an Excel data source must refer to an Excel file having data in a Table representation, with the first row used as Column Header

- 1. Close the Excel file concerned.
- Move the Excel file into the Click and DECiDE Administration Manager Data Source tab by using a drag-and-drop operation. The ODBC Setup will be created automatically.
 Note: each Excel Sheet will appear in the table list as a Table when creating a query with Click and DECiDE Builder.





2.2.6. Configuring the Click and DECiDE Connect Data Source

This internal data source allows a user from any workstation to access any data source whose setup is defined in the Click and DECiDE Administration Manager.

The following example, explains how to create an Oracle 10 data source using a Connect Data Source, the client workstation does not have an Oracle proprietary client module and the Server has a proprietary client module.

- 1. Select the TCP/IP Connection tab.
- 2. Specify the Click and DECiDE Connect Server Name or Address.

| TCP/IP Connection Database Interface |
|---|
| Validate |
| Click and DECiDE Connect Server Name or Address |
| Internet Connection Password |
| OK Cancel Apply |

3. Select the **Database Interface** tab.

| Click and DECiDE Connect Interface | — ——————————————————————————————————— |
|--------------------------------------|--|
| TCP/IP Connection Database Interface | |
| | Validate |
| Configuration Name Oracle 10 | ₽ <u>₽</u> |
| Browse | |
| OK Can | cel Apply |

- 4. Click Browse... to view the data source list from the Server.
- 5. Select the corresponding Oracle data source.





| 🛃 Select Configuration to use | | |
|--|-------|----------|
| Oracle | | OK |
| Oracle 10 Progress | | Cancel |
| S36TCPIP Secured SQL Server SQL SERVER MODEL sqlserver SQLSERVER_ODBC SupportAndManagement test2 UDB Versions WFR_AS400TCPIP_SECURISE | 4 III | . |

- 6. Click OK to validate.
- 7. Click Validate.
- 8. Confirm the login.

2.2.7. Configuring the Click and DECiDE Model Data Source

This internal data source allows a user from any workstation to access a Click and DECiDE Model data source whose setup is defined in the Click and DECiDE Administration Manager. A Click and DECiDE Model data source is a specific data source corresponding to one or several views (or domains) defined with the Click and DECiDE Model module, which allows you to create end users views with:

- Predefined join conditions between several tables.
- Hidden fields.
- Predefined calculation fields.
- Hidden criteria.
- Columns renamed with the names you want.

The benefit for the end user is that they get a view as a single table, which makes it very user-friendly as the technical features are already prepared inside the Model (join, calculation fields and so on).

The benefit for the Administrator is that it gives access to filtered information to the end user and hides unauthorized data.

Click and DECiDE Model allows you to create criteria depending on the user logon. For example a user named Smith will only see data for the SOUTH Area from a Model, whereas another user named Baxter will see data from the same Model but for the NORTH Area.

For more information, please refer to the Click and DECiDE Model Manual.





2.3. Working with the Data Source Secured by Click&DECiDE Option

When a data source is not secured by Click and DECiDE Administration Manager it is not authorized for one or several User Groups, and then it is authorized to any client user located on a remote workstation and using a Click and DECiDE Connect Data Source connected to the Server where the Click and DECiDE Administration Manager is installed. The benefit is that only the Server machine needs a proprietary client module to be installed to connect the Data Source. The remote workstation does not need this client module but can access the data source via the Server machine using the Click and DECiDE Connect Data Source.

When a data source is secured by the Click and DECiDE Administration Manager it can be assigned to each required User Group, which allows the Administrator to control the tables each User Group can access. The Administrator can only give access to a library or a list of specified tables, and customize each User Group according to the data they can access.

Note: for any connection via the Web Portal, the data source must be secured by Click&DECiDE.

Note: for security reasons a user from a client workstation cannot write inside a table which belongs to a data source secured by the Click&DECiDE Administration Manager.

| Data Source Secured by Click and DECiDE | | |
|---|---|--|
| Click and DECiDE Security | | |
| Locked Access: | | |
| Password Checked by the Data Source: | | |
| Max number of simultaneous connection: | - | |
| | | |
| | | |

2.4. Configuring Click and DECiDE Security Options

Locked Access: allows to disable or enable the access to this Data Source for all users.

Password Checked by the Data Source: the password will be checked by the Data Source for a Click and DECiDE Connect data source. If you want to make this feature work via the Web Portal for the login, perform the following steps.

| Data Source Secured by Click and DECiDE | V |
|---|----------|
| Click and DECiDE Security | |
| Locked Access: | |
| Password Checked by the Data Source: | |
| Prevent Web User Defining ID: | |
| Max number of simultaneous connection: | |

Note: the **Password Checked by the Data Source** can only be used if you activated Click and DECiDE Authentication in the Click and DECiDE Configuration Wizard, with the "Forms" or "HTTP Basic" Authentication mode:

1. Activate **Click and DECiDE Authentication** in the Click and DECiDE Configuration Wizard if necessary. To do so, close all Click and DECiDE programs and run the Click and DECiDE



Configuration Wizard, then change the Web Portal Authentication Mode when the following screen appears.

| Click and DECiDE Configuration | × |
|--|--------------|
| Web Portal and Mail Configuration Select the authentication mode for the Web Portal and enter the SM server name used to send e-mail messages. | Click&DECiDE |
| Web Portal Authentication Mode Windows Authentication Click and DECIDE Authentication | Options |

Optional: the Options button allows you to specify the Click&DECiDE Authentication Mode among 3 choices:

| Click and DECiDE Authentication Options | × |
|---|--------------|
| Forms Authentication HTTP Digest Authentication HTTP Basic Authentication Data Source for Login Validation Series | OK Cancel |
| , | |

If using a HTTP link:

- The Forms Authentication: the login goes through a Click&DECiDE form in the Web Portal page. The password is not encrypted and Data Source Login can be used to connect to the Web Portal.
- The **HTTP Digest Authentication**: the password is hashed. No Data Source Login can be used, but this mode is more secured than the Basic Authentication.
- The **HTTP Basic Authentication**: the password is not encrypted (clear text). A Data Source Login can be used to connect to the Web Portal.

If using a HTTPS link:

- In the 3 above modes, the password are encrypted or hashed.
- 2. Note that once the new configuration is finished, the ALIASES.INI file contains the following:

| [Web] |
|-------------------------------|
| UseNTUserForWebLogin=0 |
| DataSourceForWebLogin=iSeries |

3. Click **File**> <u>Update Security</u> or the corresponding icon <u>I</u> to update the Administration Manager's configuration.



3. Working with the User Groups Tab

3.1. Working with User Group Definitions

The User Group tab enables you to add, remove or modify the User Groups definition.

| User Groups | • | × | User Group |
|--|---|---|--------------------------|
| WebUsers Admin Sers Sers CnD Sers Domain Users | | | Name: Admin Description: |
| | | | Super Administrator: 🔽 |
| | | | Enable: 🔽 |

Note: if you are under Windows Authentication, the Setup will automatically have inserted the Windows Group you belong to. For example, the Users Group named "Domain Users" in English or "Utilisa. du Domaine" in French. When selecting a User Group you can see the following options in the right pane.

Super Administrator: this option is corresponding to the Task Administrator option from the previous version 32-bit (V13.X) but now gives all the rights to the Users being in this Group. In fact, now, Click&DECiDE Manager 2015 provides an important new feature allowing to give specific rights to a User group and/or a User, described later in this Guide.

Enable: allows you to disable or enable all users belonging to a User Group at the same time. For example the Administrator can forbid a User Group to have direct access to any database or Web Portal access during a certain period.

Note: a User Group branch always displays five branches:

- Users: by default this does not contain any users if Windows Authentication is used, unless you need to declare certain users as CAL users (Client Access License). This branch contains identified Users if Click&DECiDE Authentication is used. Refer to the <u>User tab</u>.
- Data Sources Access: contains all Secured Data Sources assigned to the User Group. Refer to the Data Source tab.
- Menu Access: contains all the menus assigned to the User Group. Refer to the Menu tab.
- **Model Parameter:** this branch is empty by default, it can contain the parameters linked to a Click&DECiDE Model. Please refer to the Click&DECiDE Model Manual.
- Rights (New since version 2015): concerns what can do or see a User Group or User in the Web
 Portal. Refer to paragraph "Modifying some Rights for a User Group or a User"

3.2. Assigning Data Sources to a User Group

Once the data sources you need have been created and the Secured mode has been activated, you must grant access rights for these data sources to the concerned User Groups. To do so, please follow the steps below.

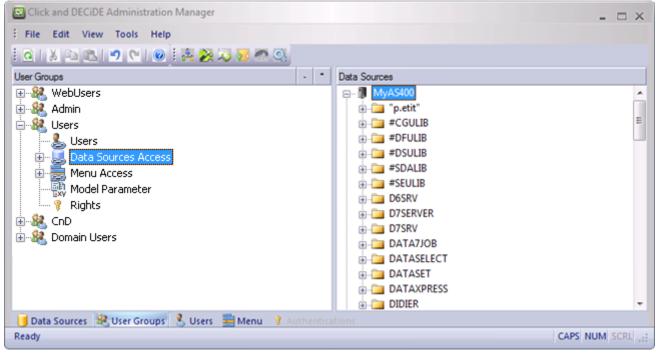
1. Select the **User Group** tab.





| Click and DECiDE Administration Manager File Edit View Tools Help | | | - ¤ × |
|---|------------|---|----------------|
| User Groups | | Data Sources | |
| WebUsers Admin Users Users Data Sources Access Menu Access Model Parameter Rights CnD Domain Users | | ⊕- ∰ MyAS400 ⊕- 间 Secured SQL Server | |
| 🔰 Data Sources 😣 User Groups 🤱 Users 🗮 Menu 😗 | Authentica | tions | |
| Ready | | | CAPS NUM SCRL; |

- 2. Select the User Group you need to modify, for example the group "Users" which is a Windows Group.
- 3. Select the Data Sources Access branch.
- 4. Note all the data sources declared as "Secured by Click and DECiDE" appear in the right pane.
- 5. Click the Data Source you want, in this example click the AS/400 Data Source.
- 6. Enter your login details. The Library and table list will appear.



- 7. Select a library.
- 8. Select the tables you want or give access to the whole library if you do not want to limit the access to only some tables.



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| Click and DECiDE Administration Manager | - = × |
|--|--------------------------------|
| File Edit View Tools Help | |
| i Q X 🗅 🖄 💌 🔍 🔘 i A 👰 🧔 🐖 Q | |
| User Groups - | Data Sources |
| Admin Users Users Data Sources Access DataSet Vision CSV_Web DataSet Vision CSV_Web Secured SQL Server DATAXPRESS DATAXPRESS SAMPLE/CATEGORY SAMPLE/CATEGORY SAMPLE/SALES SAMPLE/SALES_DETAILS SAMPLE/SALES_DETAILS SAMPLE/SALES_MAN Menu Access Model Parameter | MyAS400 Secured SQL Server |
| 📑 Data Sources 😣 User Groups 👶 Users 🚔 Menu 🕴 Authenti | |
| Ready | CAPS NUM SCRL .: |

In the above example, the Group named "Users" will now have access to the full AS/400 library named "DATAEXPRESS" but will only have access to some tables in the SAMPLE library.

9. Select **File**> <u>Update Security</u> or the corresponding icon <u>I</u> to update the Administration Manager's configuration.

3.3. Adding Users to a User Group

Although no users are required when you are in Windows Authentication Mode, you may sometimes need to add or remove users in a User Group, for example if you are in Click&DECiDE Authentication mode. To add users to a User Group, please follow the steps below.

1. Click the **User** branch in a User Group you want to add the user to.

| User Groups | • | × | All Users | | | | | |
|--------------------------------------|-------|-----|-------------------|------|----------|----------|-----------|----|
| 🖶 🍇 CnD | | * | User ID | Name | Password | Departme | Address 1 | Ad |
| | | | 👗 Admin | | *** | | | |
| Didier | | | 👃 Guest | | *** | | | |
| Olivier Pierre | | | 👃 🕹 Administrator | | *** | | | |
| ⊕ Herre ⊕…,, Data Sources Access | | | 👃 Didier | | *** | | | |
| E Menu Access | | Ξ | 👃 Olivier | | *** | | | |
| BAI Demonstration | | | 👗 Pierre | | *** | | | |
| Web Portal Statistics | | | 👗 Leif | | *** | | | |
| | | | 👗 Robert | | *** | | | |
| 🛛 🖓 Rights | | Ŧ | • | 111 | | | | Þ |
| 📔 Data Sources 🐰 User Groups 🤱 Users | 🚞 Mer | nus | 💡 Authenticatio | | | | | |

<u>Other situation</u>: under Windows Authentication, you want to remove the non-used Admin and WebUsers Groups (installed by default for the Click&DECiDE Authentication) and also the non-used Admin and Guest Users. If you do that and try to close Click&DECiDE Administration Manager, you could have a message saying that no User is defined inside a User Group being Administrator or that you have perhaps remove the only User Group being Administrator.

In that case, you need to define at least one Windows User Group being "Super Administrator" and drag and drop at least one user in this User Group.



2. Select the User in the All Users right pane.

| User Groups | • | × | All Users | | | | | |
|--|-----|-----|-----------------|------|----------|----------|-----------|----|
| | | * | User ID | Name | Password | Departme | Address 1 | Ad |
| | | | 🤱 Admin | | *** | | | |
| Didier Olivier | | | 🤱 Guest | | *** | | | |
| Pierre | | | 👃 Administrator | | *** | | | |
| In the second secon | | | 💄 Didier | | *** | | | |
| | | F | 👃 Olivier | | *** | | | |
| BAI Demonstration | | | 🔏 Pierre | | *** | | | |
| Web Portal Statistics | | | 🚴 Leif | | *** | | | |
| | | | 👗 Robert | | *** | | | |
| 🔤 💡 Rights | | Ŧ | • | III | | | | P. |
| 📋 Data Sources 🦓 User Groups 🤱 Users 🚞 | Mer | nus | 💡 Authenticatio | ns | | | | |

3. Move the User to the Users branch in the User Groups pane using a drag-and-drop operation.

| User Groups | • | × | All | Users | | | | | |
|---|-----|-----------|-------------------|---------------|----------|----------|----------|-----------|----|
| | | * | U | er ID | Name | Password | Departme | Address 1 | Ad |
| E Subsers | | | 8 | Admin | | *** | | | |
| Olivier Pierre Leif | | 🔲 🥈 Guest | | *** | | | | | |
| | | | 8 | Administrator | ator *** | | | | |
| | | | 8 | Didier | | *** | | | |
| ⊕ | | = | 👗 Olivier 🛛 😽 *** | | | | | | |
| | | | 1 | Pierre | | *** | | | |
| BAI Demonstration | | | 8 | Leif | | *** | | | |
| Web Portal Statistics | | | 8 | Robert | | *** | | | |
| | | Ŧ | • | | m | | | | |
| 间 Data Sources & User Groups 🔱 Users 🚞 | Mer | nus | 8 | | | | | | |

4. Select File> Update Security or the corresponding icon do update the Administration Manager's configuration.

3.4. Removing Users from a User Group

To remove users from a User Group, please follow the steps below.

1. Click the User branch in the User Group you want to remove the user from.

| Click and DECiDE Administration | on M | anager [Mode: Click and Decide] — 🗖 🗙 |
|--|-----------------|---|
| Eile Edit View Tools Help | 6 | 2 2 2 2 2 3 4 4< |
| User Groups Users Users Didier Olivier Pierre Data Sources Access Menu Access Model Parameter | * | User ID: Leif Name: Password: Confirmation: Enable: CAL: |
| Rights Control Contro | ▼ nus | Authentications |

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- 2. Select the User in the list.
- 3. Press Del.

| Click and DECiDE Administration | Click and DECiDE Administration Manager [Mode: Click and Decide] — 💻 🗴 | | | | | | |
|---|---|-----------------|------|----------|----------|-----------|-------|
| Eile Edit View Tools Help | 61 | @ 🖄 💫 { | 2 🐢 | <u>.</u> | | | |
| User Groups - | × | All Users | | | | | |
| 🗄 🍇 Users | | User ID | Name | Password | Departme | Address 1 | Ad |
| CnD | | 💄 Admin | | *** | | | |
| Didier | | 👃 Guest | | *** | | | |
| Olivier | | 🐁 Administrator | | *** | | | |
| Pierre | | 👃 💄 Didier | | *** | | | |
| 🗉 - 🔜 Data Sources Access | Ξ | 👃 Olivier | | *** | | | |
| 🗄 🚎 🧮 Menu Access | | 📕 🕹 Pierre | | *** | | | |
| 😟 🖶 Menu Access | | 📕 🕹 Leif | | *** | | | |
| 🖓 Rights | | 👃 Robert | | *** | | | |
| 🗄 📲 Domain Users | Ŧ | • | | | | | Þ |
| 🚺 Data Sources 🦓 User Groups 🤱 Users 🗮 Mei Ready | nus | Authentication | | | CAPS | NUM SCR | L .:: |

4. Click **File**> <u>Update Security</u> or the corresponding icon **(** to update the Administration Manager's configuration.

3.5. Adding a Menu to a User Group

To add an existing Menu to a User Group, please perform the following steps.

1. Click the Menu Access branch for a User Group.

| Click | Click and DECiDE Administration Manager [Mode: Click and Decide] — 💻 🕱 | | | | | | |
|---|---|-------|--|--|--|--|--|
| É <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>T</u> ool | s <u>H</u> elp | × | 🔞 🛛 🕺 💫 📣 🦚 | • | | | |
| WebUsers Admin Jeers CnD Users CnD Jeers Didier Jolder Jolder Jolder Sources Acc Menu Access Menu Access Menu Access Model Parameter Web Portal St Web Port | ation | * | Description BAI Demonstration BAI Tools Web Portal Statistics | Menu Path %CND_BAI_SAMPLES%\Web Portal\DemoTo %CND_BAI_SAMPLES%\Web Portal\Web Ser | | | |
| Keauy | | | | CAPS NOM SCRL | | | |

- 2. Select the Menu in the **All Menus** right pane.
- 3. Move the Menu to the **Menu Access** branch in the **User Groups** pane using a drag-and-drop operation.





4. Select **File**> <u>Update Security</u> or the corresponding icon <u>I</u> to update the Administration Manager's configuration.

3.6. Removing a Menu from a User Group

To remove an existing Menu from a User Group, please perform the following steps.

1. Click the Menu Access branch for a User Group.

| Click and DECiDE Administration | Click and DECiDE Administration Manager [Mode: Click and Decide] - 🗖 🗴 | | | | | | |
|--|---|---|--|--|--|--|--|
| Eile Edit View Tools Help | 61 | 0 2 2 2 2 2 | <u>Q</u> | | | | |
| User Groups - | × | All Menus | | | | | |
| E-& WebUsers | * | Description | Menu Path | | | | |
| Bers Data Sources Access Menu Access BAI Demonstration BAI Tools Model Parameter Rights Admin Wusers | III | BAI Demonstration BAI Tools Web Portal Statistics | %CND_BAI_SAMPLES%\Web Portal\DemoWe %CND_BAI_SAMPLES%\Web Portal\DemoTo %CND_BAI_SAMPLES%\Web Portal\Web Ser | | | | |
| | Ŧ | • | III. F | | | | |
| 📋 Data Sources 🦓 User Groups 🤱 Users 🗮 Me | nus | Authentications | | | | | |
| Ready | | | CAPS NUM SCRL | | | | |

- 2. Select the Menu in the list.
- 3. Press Del.
- 4. Click **File**> <u>Update Security</u> or the corresponding icon **(** to update the Administration Manager's configuration.

3.7. Modifying a Parameter Value for a Model

Please refer to the Click&DECiDE Model Manual for more information.

3.8. Modifying some Rights for a User Group or a User

This is the main new feature for this Click&DECiDE version 2015. By default the Rights branch displays the following options where nothing is specified:

| • See WebUsers | | | |
|--|---|-------------|--|
| UsersF Data Sources AccessF Data Sources AccessF Menu AccessF Model ParameterF RightsF CnDF Domain UsersF | ght Pivot_Create Dashboard_Create User_Folder_Delete User_Folder_Write Group_Folder_Write Group_Folder_Write Folder Delete | Authorizati | Description V: Deny, Allow[(All)] V: Deny, Allow[(All)] V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] |
| - ד ד ד | P Folder_Write P Flow_Manage P User_Manage P Schedule_Execute P Schedule_Manage P Task_Manage | | V: Deny, Allow[(All,Menu.Desc)] Cr/Del/Ed U-V: Deny,Allow[(All)] Cr/Del/Ed U-V: Deny,Allow[(All)] Ex via shrtct ONLY - Values : Deny, Allow[(All)] Cr/Del/Ed Schedule - Values : Deny, Allow[(All)] Cr/Del/Ed Task - Values : Deny, Allow[(All,Self,Menu.Desc)] |

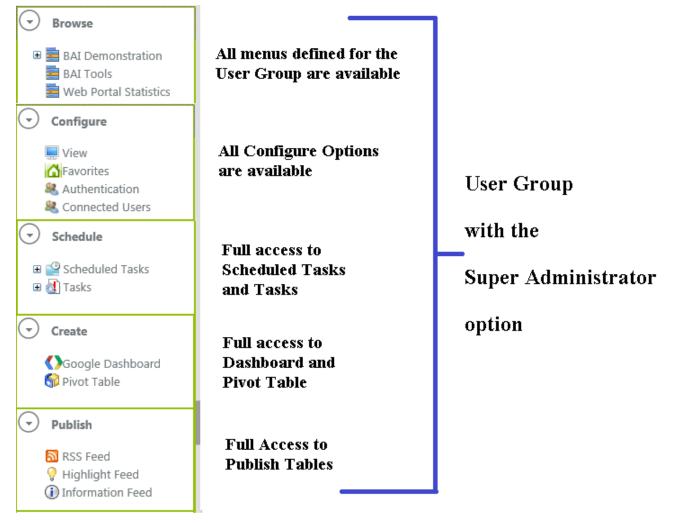
📙 Data Sources 🛛 🎎 User Groups 🖁 🐰 Users 🚔 Menus 😗 Authentications

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3.8.1. Super Administrator User Group

If the User Group is defined as "Super Administrator", any user from this Group can see and do everything: (not depending to any right specified in the right screen).



This configuration is corresponding to the default situation in previous versions when the "Task Administrator" option was enabled for a User Group.

Moreover, the Super Administrator is now the only one able to create and manage:

→ Generic Tasks

And

→ SQL Tasks.

(New in version 15.0.1)

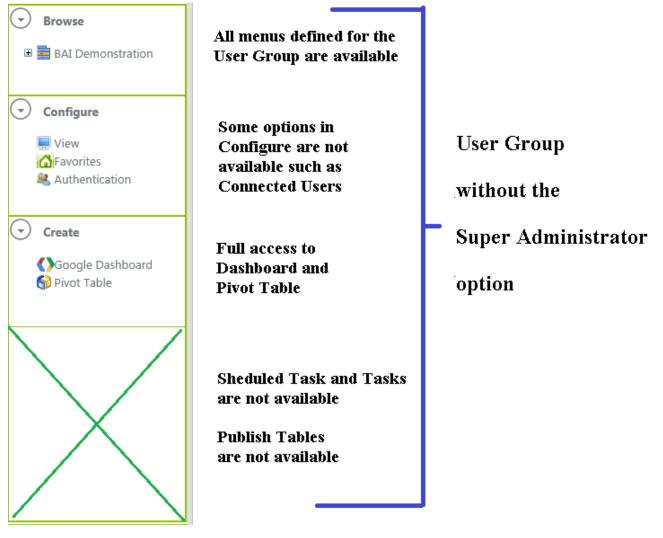
Contact us: E-mail: <u>support@clickndecide.com</u> Tel: +33 (0)4 67 84 48 00 Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France. WWW.Clickndecide.com To contact your nearest Click&DECiDE partner, click here.





3.8.2. User Group not being Super Administrator

If nothing is specified, and the User Group is NOT defined as "Super Administrator", any user from this Group can only see:



This configuration is corresponding to the default situation in previous versions when the "Task Administrator" option was disabled for a User Group:

Unless specified in another User Group, Users belonging to such a User Group:

- **Can** see and run the available Menus applied to this User Group. •
- Can modify the View configuration, manage their Favorites and see how they are authenticated in the • Web Portal and, if needed, manage their data source login.
- Can create and run some Dashboards and Pivot Tables, but can only save their works in their own User Shared Folders (see Inserting a Shared Folder by User)
- Cannot access to Tasks and Scheduled Tasks.
- Cannot access to the Publish Tables.





3.8.1. Customizing Rights for User Groups and Users

In this manual, the following terms are corresponding to:

Resource: item whose right can be modified (Pivot Table, Dashboard, Folder, Group Folder, User Folder, User, Schedule, Task, Flow)

Action: the operation that can be applied to a Resource. (Create, Write, Delete, Manage, Execute)

Authorization: is this Action on this Resource is allowed or denied?

A **Right** is a combination of a Resource + Action + Authorization.

If at least one right is defined (for example _P Dashboard_Create = Allow), then all rights are considered as "customized" and follow the rules below:

- "Undefined" (Empty string or "NULL"): the action on this resource is not authorized
- "Allow": the action on this resource is authorized.
- "Deny": the action on this resource is not authorized, even if authorized in another User Group.

Moreover, you can specify some attributes (depending on the resource) to the "Allow" authorization for more granularity:

- Allow(All): the action is authorized for all resources accessible to the User (not limited to the current User Group). This can also be written "Allow".
- Allow(Group.<Name>): Reserved for a future version only for _Flow Manage and _PUser Manage.
- Manage.Allow(Menu.<Description>): the action is authorized for all resources defined in the specified Menu.

You can specify more than one attribute, separating them with a comma ",".

Example:

For a specific User Group, being only in one specific Group, we want to apply "Allow" to the Create Dashboard resource:

In Administration Manager, select the Right "_P Dashbaord_Create" for this User Group:

| User Groups - * | Droits | | |
|--|---------------------------------------|-------------|--|
| Model Parameter | | | |
| E- & Users | Right | Authorizati | Description |
| Users | P Pivot Create | | V: Denv. Allow[(All)] |
| 🗄 🖳 🛃 Data Sources Access | _P Dashboard_Create | | V: Deny, Allow[(All)] |
| · → · · · · · · · · · · · · · · · · · · | _P User_Folder_Delete | | V: Deny, Allow[(All,Menu.Desc)] |
| Model Parameter | _P User_Folder_Write | | V: Deny, Allow[(All,Menu.Desc)] |
| i i ? Rights i⊒ | _P Group_Folder_Delete | | V: Deny, Allow[(All,Menu.Desc)] |
| End Users | _P Group_Folder_Write | | V: Deny, Allow[(All,Menu.Desc)] |
| Data Sources Access | _P Folder_Delete | | V: Deny, Allow[(All,Menu.Desc)] |
| DataSet Vision CSV | _P Folder_Write | | V: Deny, Allow[(All,Menu.Desc)] |
| 🛓 👘 DataSet Vision CSV_W | _P Flow_Manage | | Cr/Del/Ed U-V: Deny,Allow[(All)] |
| iSeriesGGO | _P User_Manage _P Schedule_Execute | | Cr/Del/Ed U-V: Deny,Allow[(All)] Ex via shrtct ONLY - Values : Deny, Allow[(All)] |
| i Local Database | _P Schedule_Execute | | Cr/Del/Ed Schedule - Values : Deny, Allow[(All)] |
| Secured SQL Server | _P Task_Manage | | Cr/Del/Ed Task - Values : Deny, Allow[(All,Self,Menu.Desc)] |
| ⊞ iSeries ⊡ Menu Access | | | |
| Menu Access Menu Access Main BAI Demonstration | | | |
| | | | |
| Rights - | | | |
| | | | |
| Data Sources 🤽 User Groups 💈 | Users 🗮 Menus 🦹 / | | s |

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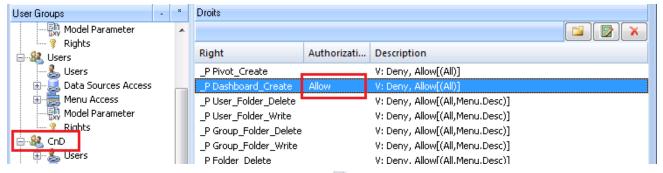


| Rights | | × |
|-----------------|---|---|
| Rights: | _P Dashboard_Create | • |
| Description: | V: Deny, Allow[(All)] | |
| Authorization : | Allow | • |
| | Allow Allow(All) Allow(Group.GroupName) Allow(Menu.Desc) Deny | |

Now click the Edit icon and open the list box for the Authorization option:

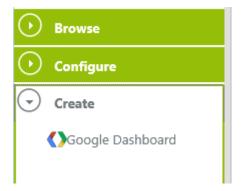
Select "Allow" and click OK.

Now the User Group "CnD" is allowed to Create Dashboard but not authorized to create anymore some Pivot Tables because the Resource "Pivot table" is now undefined (blank string).



Click **File>** <u>Update Security</u> or the corresponding icon <u>I</u> to update the Administration Manager's configuration.

In the Web Portal, a user belonging to this User Group will see this Create Menu without the Pivot Table:



Other example: we want this User Group to be authorized to Manage his own Tasks but only concerning existing items from the BAI Demonstration Menu:

In Administration Manager, select the Right "_P Task_Manage" for this User Group, and edit the value to enter "Allow(Self , Menu.BAI Demonstration)":

- "Self" means his "own" tasks only
- "Menu.BAI Demonstration" will limit this action to the "BAI Demonstration" Menu.





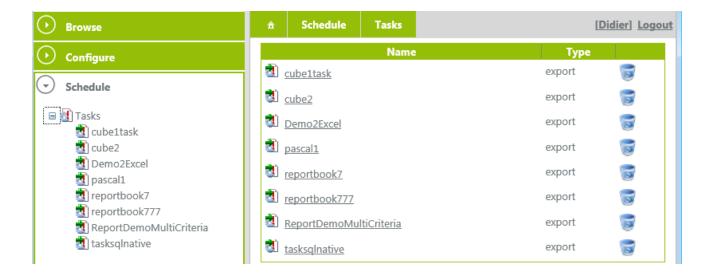
| CrD Users Data Sources Access DataSet Vision CSV DataSet Vision CSV DataSet Vision CSV_W DataSet Vision CSV_W Data | _P Group_Folder_Delete _P Group_Folder_Write _P Folder_Delete _P Folder_Write _P Flow_Manage _P User_Manage _P Schedule_Execute _P Schedule_Manage _P Task_Manage | w(Self,Menu.BAI Demonstration) | V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] V: Deny, Allow[(All,Menu.Desc)] Cr/Del/Ed U-V: Deny,Allow[(All)] Cr/Del/Ed U-V: Deny,Allow[(All)] Ex via shrtct ONLY - Values : Deny, Allow[Cr/Del/Ed Schedule - Values : Deny, Allow[Cr/Del/Ed Task - Values : Deny, Allow[(All) |
|---|---|--------------------------------|---|
|---|---|--------------------------------|---|

Click **File**> <u>Update Security</u> or the corresponding icon **(IDE)** to update the Administration Manager's configuration.

In the Web Portal, a user belonging to this User group will see the **Save Task** button available for a query, a report or a cross table from a Menu:

| Output Format: PDF | O HTML O Other: Excel XLS • |
|----------------------|------------------------------|
| 🕑 Share | |
| | Run Export to File Save Task |
| | |

And will only see the **Tasks** Branch in the **Schedule** level:



Note that:

II.

_P Flow_Manage can be used for a User Group or User authorized to see the Publish branch in the Web Portal.





_P User_Manage can be used for a User Group or User authorized to see the **Connected Users** in the **Configure** branch in the Web Portal, and thus can disconnect a user (Windows Authentication) or make him Inactive (Click&DECiDE Authentication).

3.8.2. Rights Managements Organigram

| | | | | | | Allow(Z1,Z2,) | |
|---|---|--------------------------------|------------------------------|--|-----------------------------------|---|--|
| | | Undefined | Deny | All | Self | Menu. <menudescription></menudescription> | Group. <groupname> (Reserved for future version)</groupname> |
| _P Dashboard_Create _P Pivot_Create | Access to Dashboard and/or Pivot Application | Can't do except if Allow | Can't do even if Allow | Can do | N/A | N/A | N/A |
| _P Folder_Write _P Folder_Delete _P Group_Folder_Write _P Group_Folder_Delete _P User_Folder_Write _P User_Folder_Delete | Write Delete in: Shared Folder Group Folder User Folder | Can't do except if Allow | Can't do even if Allow | Can do on all accessible folders | N/A | Can do on all folders of this menu | N/A |
| _P Task_Manage | Create Delete Edit ->Tasks | Can't do except if Allow | Can't do even if Allow | Can manage tasks whose item is accessible | Can manage his own tasks | Can manage tasks whose item belong to the menu and is accessible | N/A |
| _P Schedule_Manage | Create Delete Edit ->Schedule | Can't do except if Allow | Can't do even if Allow | Can manage schedules whose all tasks can be managed | N/A | N/A | N/A |
| _P Schedule_Execute | Execute Schedule via shortcuts ONLY | Can't do except if Allow | Can't do even if Allow | Can execute schedules whose items from all tasks are accessible | N/A | N/A | N/A |
| _P User_Manage | Create / Delete / Edit User View connected user and disconnect | Can't do except if Allow | Can't do even if Allow | Can manage all users | N/A | N/A | Can manage users that belong to the group |
| _P Flow_Manage | Add / Delete /Edit RSS / Information / Highlight flows | Can't do except if Allow | Can't do even if Allow | Can manage all flows | N/A | N/A | Can manage flows intended for the specified group |

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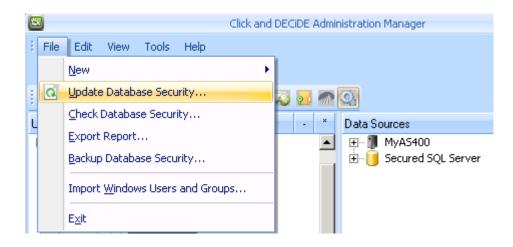


4. Updating Database Security

Each time you modify the access right inside the Administration Manager program, you must update the database security by selecting **File> Update Database Security** or by clicking the Update icon

You must update Database Security when you create a data source, a User Group, a User and when you change any link between the Administration Manager Tabs (Data Source, User Group, User, Menu and Authentication).

This action will update internal files used by Click&DECiDE.



Note that if you close the Click&DECiDE Administration Manager without clicking **Update Database Security...** a message will appear asking if you want to update database security.. It is always recommended to do so to ensure that the configuration is updated.





5. Working with the Users Tab

If the User Group is a Windows Group, all the users who belong to this Group will have the same access rights to the database tables as defined previously. Each user name does not need to be entered in the Administration Manager, except if you want to declare some of them as "CAL" users (according to your license certificate). A "CAL" (Client Access License) must be an identified user in the Administration Manager. If you only have concurrent users in your license certificate, you do not need to identify them in the Administration Manager.

5.1. Adding Users in the Users Tab

If the User Group is not a Windows Group, and if you are in Click and DECiDE Authentication mode, then you need to add the users you want to manage and add each user in a User Group. To add a user, please follow the steps below.

- 1. Select the Users tab.
- 2. Select File> New> User or right-click and select New> User. In the example below we are going to create the user James Smith and declare him as a CAL user.

| Sclick and DECiDE Administration Manager | | - = × |
|--|------------------------------|----------------|
| File Edit View Tools Help | | |
| i 🖸 i 💫 🖭 🥙 🕙 🔘 i 🖧 🎘 🌄 🐖 🔍 | | |
| Users - * | User | |
| ⊕ Admin ⊕ Guest ⊕ Didier ⊕ Pascal ⊕ Enrique ⊕ Pierre ⊕ Robert ⊕ Leif ⊡ Smith | UserID: Smith | - |
| | Name: James Smith | |
| ierrise Pascal ierrise Enrique | Password: | |
| | Confirmation: | |
| 🗄 💈 Robert | Enable: | |
| | CAL: | |
| User Groups | | |
| : | Data Source User ID Password | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| 🚺 Data Sources 🤐 User Groups 🔮 Users 🚔 Menu 🦹 Au Ready | thentications | CAPS NUM SCRL; |
| r cauy | | CKP3 NOM SCRU |

 Enter the following details in the right pane for each user: User ID: this is mandatory. Name: this is Optional. Password: this is optional, depending on the Authentication mode used. Enable: allows the Administrator to disable or enable a specific user without disabling the whole User Group. For example the Administrator can forbid a user to have direct access to any database or to the Web Portal for a certain period.

4. Add this user to the required User Group, for example WebUsers.





- 5. Click the User Groups tab.
- 6. Select the WebUsers group.
- 7. Select the Users branch.

| Click and DECiDE Administration Manager | | | | | | - 🗆 × |
|---|----------------|-------------|--------|---------|--------|---------|
| E File Edit View Tools Help | | | | | | |
| i 🖸 i X 🗈 🖭 🤊 💙 🎯 i 🎘 🎘 🐺 🚳 🔇 | | | | | | |
| User Groups - * | All Users | | | | | |
| Harris Admin | User ID | Name | Passwo | Departm | Addres | Addres |
| E Webland | 👃 Admin | | *** | | | |
| WebUsers | 👃 💄 Guest | | *** | | | |
| Guest | 🐁 Didier | | *** | | | |
| Didier | 📕 🔱 Pascal | | *** | | | |
| Robert | 📕 🕹 Enrique | | ××× | | | |
| 🖃 🖳 Data Sources Access | 📕 🕹 Pierre | | *** | | | |
| i Data Sources Access | 📕 🕹 Robert | | ××× | | | |
| BAI Demonstration Web Portal Statistics | 👗 Leif | | *** | | | |
| | 👗 Smith | James Smith | ××× | | | |
| Model Parameter | | | | | | |
| E - 🎎 Domain Users | | | | | | |
| | · · | | | | | • |
| 📙 🚺 Data Sources 용 User Groups 🤱 Users 🚆 Menu 🕴 A | uthentications | | | | | |
| Ready | | | | | CAPS | JM SCRL |

- 8. Select the new user, for example Smith in the right All Users pane.
- 9. Move the new user from the **All Users** pane to the **Users** branch in the left **User Groups** pane using a drag-and-drop operation.

| Click and DECiDE Administration Manager | | | | | | - 🗆 X |
|---|----------------|-------------|--------|---------|--------|---------|
| Erile Edit View Tools Help | | | | | | |
| i Q i X 🖻 🛍 🔊 🝽 🞯 i A 🎘 🛪 🗖 🕷 🔇 | | | | | | |
| User Groups - * | All Users | | | | | |
| H Admin | User ID | Name | Passwo | Departm | Addres | Addres |
| Burgers | 👗 Admin | | *** | | | |
| e WebUsers | 👃 🚨 Guest | | *** | | | |
| Guest | 👃 👃 Didier | | *** | | | |
| Didier | 💄 Pascal | | *** | | | |
| Robert | 👃 🕹 Enrique | | *** | | | |
| Smith | 👃 🕹 Pierre | | ××× | | | |
| Data Sources Access | 👃 Robert | | *** | | | |
| | 👗 Leif | | ××× | | | |
| BAI Demonstration | 👗 Smith | James Smith | *** | | | |
| Web Portal Statistics | | | | | | |
| Model Parameter | | | | | | · · · · |
| Domain Users | • | | | | | - F |
| 🔡 📴 Data Sources 🎎 User Groups 🔮 Users 🚆 Menu 💡 A | uthentications | | | | | |
| Ready | | | | | CAPS | JM SCRL |

- 10. Add the data sources that you want to authorize for the WebUsers group. In this example the MyAS400 data source has been added to the authorized data sources for the WebUsers group.
- 11. Click the Update Security icon of to validate the changes.



5.2. Specifying Data Source Login for each user

If a data source is defined in Click and DECiDE Administration Manager but you do not want to use a unique User ID/Password by default for all users, as in the following picture:

| Data Source: AS/400 TCP/IP | |
|---|------------|
| Name: AS400TCPIP | Properties |
| Use a unique User ID/Password by default. Identification | |
| User ID: |] |
| Password: |] |
| Confirmation: |] |
| Data Source Secured by Click and DECIDE | |
| Click and DECiDE Security | |
| Locked Access: | |
| Password Checked by the Data Source: | |
| Max number of simultaneous connection: | × V |
| | |

it is possible to define in the Users Tab a specific login for one or several data sources. To do so, select the User in the User Tab and make a right mouse click in the right bottom window and select **New> Password**:

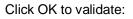
| User | | | |
|---------------|----------|---------------|---------------------|
| User ID: | Didier | | |
| Name: | | | |
| Password: | | | |
| Confirmation: | | | |
| Enable: | | | |
| CAL: | V | | |
| Data Source | | User ID | Password |
| | | | |
| | | <u>N</u> ew → | <u>D</u> ata Source |
| | | | User <u>G</u> roup |
| | | | <u>U</u> ser |
| | | | <u>P</u> assword |
| | | | <u>M</u> enu |

Select the Data Source Name and enter the User login:





| Define Data Source | ce Login Details | v |
|--------------------|--|--------|
| Data Source Nam | ie: | ОК |
| AS400TCPIP_SE | CURED 🔹 | Cancel |
| User ID: | DIDIER | |
| Password: | ••••• | |
| Confirmation: | ••••• | |
| Enter the User ID | and Password to access this data source. | |



| Users - * | User |
|---|--|
| Admin AdminDB Administrator Analyser Analyser Baxter Jim Davis Sandra Didier | User ID: Didier Name: Password: Confirmation: Enable: |
| User Groups | CAL: CAL: |
| ia is Secured SQL Server ia is AS400TCPIP_SECURED | |

When the above user will connect to the AS400TCPIP_SECURED data source, the iSeries login sent to the data base will be the one defined in the above screen, being specific to each user.

If you wish to remove any row in the right bottom frame, select the required row and click the command **Edit> Delete**.





6. Using Group and User Group Properties

A "Property" is new feature since version 10.2.1 allowing to apply some criteria to a Group and/or a User Group, decided by the Administrator. Later, when running a query, report or cube through the Web Portal or a Click&DECiDE Connect Data Source, the end-user will retrieve data filtered by this property.

Example: if a Property allows a User to get data only from SOUTH and EAST areas, any query, report or cube based on this Property, will only return data for the SOUTH and EAST areas. If this User belongs to a Group whose Property also authorize to see the NORTH-WEST area, then the user will get records corresponding to the SOUTH, EAST and NORTH-WEST areas.

When you select a Group or a User Group, you can see on the right pane a "Properties" frame with 3 buttons:

| 8 | Click and DECiDE Administration Manager _ 😑 🗙 | | | | |
|--|---|--|--|--|--|
| File Edit View Tools Help File Edit View Tools Help User Groups - - - - - - - - - - - - - | User Group Name: Admin Description: Task Administrator: Image: Ima | | | | |
| | Properties | | | | |
| | Property Value Type Description Ctrl. Value | | | | |
| 间 Data Sources 🎎 User Groups | | | | | |
| Ready | CAPS NUM SCRL .: | | | | |

6.1. The first button allows to create a new Property:

| New Property | | |
|----------------------------|---------------------------------|-----------|
| Name | New User or User Group Prope | rty |
| Туре | String | • |
| Description | | |
| Value | | |
| (Values separated by a ser | nicolon with multi values type) | OK Cancel |

Name: enter a name for the Property (this name will be used later in a Click&DECiDE Builder parameter – Refer to the Click&DECiDE Builder Query User Guide).

Type: select the required type for single values among String, Numeric, Date, Time or Timestamp. Note that for multiple values you must select the **Multi values** Type whatever will be the field type.

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Description: optional, you can enter here a text to remember the purpose of the property.

Value: if empty, nothing will be applied for the Group and User group whose Property value is empty. If not empty, you can enter a single value or several values with a semicolon separator if Multi values type has been chosen.

Validate with OK

| Properties | | | | | |
|------------|---------------|-------------|--------------------|---------------|--|
| Prope | Value | Туре | Description | Ctrl. Value | |
| AREA | SOUTH;CENTRAL | Multi value | test demo database | SOUTH;CENTRAL | |

Click the **Update Security** icon **I** to validate the changes.

6.2. The second button 📝 allows to edit an existing Property:

Click this icon to edit and modify an existing property. Example: with the Click and DECiDE Web Demonstration.wfv project file, all queries inside have a parameter calling the property named AREA. You can thus enter the following values to test this feature with the demo database:

| Edit Property | | |
|----------------------------|---------------------------------|-----------|
| | | |
| Name | AREA | |
| | (| |
| Туре | Multi values | ▼ |
| Description | test demo database | |
| | | |
| Value | WEST;NORTH-WEST | |
| (Values separated by a sen | nicolon with multi values type) | OK Cancel |

All available values for AREA are: ATLANTIC;CENTRAL;NORTH-WEST;SOUTH;WEST

Click the Update Security icon of to validate any changes.

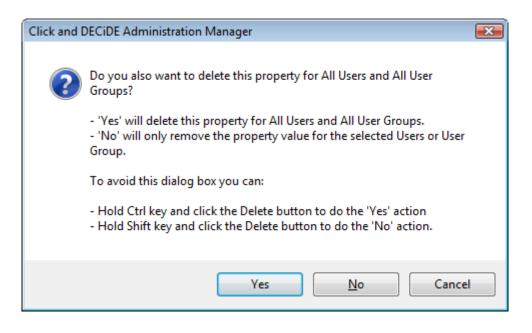
6.3. The third button 🚵 allows to remove partially or totally an existing Property:

Click this icon if you wish to clear the values for a Group or User Group or if you wish to remove this property for all Groups and User Groups.

The following choice will be prompt:







6.3.1. Remove partially a Property for a Group or User Group

Click No to only clear the value(s) for the selected Group or User Group

Click the Update Security icon of to validate any changes.

6.3.2. Remove totally a Property for all Groups and User groups

Click **Yes** to delete this property for all Groups and User Groups. Make sure that no query is still using this Property in your Click&DECiDE or Dashboard applications.

Click the <u>Update Security</u> icon A to validate any changes.

6.3.3. Do not make any change

Click Cancel to do not apply any change.

6.4. How a property is used inside a Click&DECiDE Query?

You can see several examples by opening the Click and DECiDE Web Demonstration.wfv project file in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.

Open for example the "demo_multicriteria" query

Click Query> Parameter to open the Parameter Dialog Box

Select the parameter named PropertyArea

As you can see in the next picture, this parameter is updated by a **User Property**, is optional and the name of the UserPropety is AREA, defined in Administration Manager as described previously as an example.

When a User Property is optional, the value IGNORE will be used in the query.





| ? Query Para | meters 💌 | | |
|---|----------------------|--|--|
| Parameters: | 🖺 🗙 🕈 🗲 🕌 🛍 | | |
| param_area param_salea | sman | | |
| PropertyAre | | | |
| | Parameter Properties | | |
| Name | PropertyArea | | |
| Туре | String | | |
| Status | Enable | | |
| Update Method | User Property | | |
| Mandatory | No | | |
| Parameter | AREA | | |
| | | | |

For more information, please refer to the <u>Click&DECiDE Builder Query User Guide</u>.





7. Working with the Menu Tab

The Menu tab allows the Administrator to add or remove Menus, previously created with Click&DECiDE Web Menu. The Administrator can define the menu name that should be displayed via the Web Portal and the path to the menu file with the .wmu extension.

| | Click and DECiDE Administration Manag | er [Mode: Windo | ws] _ = X |
|-------------------------|---|-----------------|-------------------------------|
| File Edit View Too | ls Help | | |
| i 🛛 i X 🖻 🛍 🔊 (| 🖂 🞯 🤅 🚵 🧔 🦛 🔯 | | |
| Menus | | | <u> </u> |
| Menus | Menu Path | | |
| BAI Demonstration | %DATASET_DEMO%\DemoWeb\DemoWeb.wmu | Name: | BAI Demonstration |
| 喜 BAI Tools | %DATASET_DEMO%\DemoWeb\DemoTools.wmu | | |
| 📄 Web Portal Statistics | %DATASET_DEMO%\DemoWeb\Web Server Statist | Path: | %DATASET_DEMO%\DemoWeb\D Edit |
| | | | |
| | | | |
| | | | |
| • | | • | |
| 📋 Data Sources 🛛 🎎 User | Groups 🤱 Users 🚞 Menus 💡 Authenticatio | ns | |
| Ready | | | CAPS NUM SCRL |

7.1. Adding an Existing Menu

To add an existing menu in the left Menu pane, please follow the steps below.

- 1. Select File> New> Menu, or right-click and select New> Menu.
- 2. Change the default "New Menu" name by the name you want.
- 3. Click the Path Browse button in the right pane, to find the menu file with the .wmu extension on the hard disk.
- 4. Click in the left pane to view the Menu Path.
- 5. Modify the path to replace the beginning of the path with an environment variable if necessary.
- 6. Click File> Update Security or the corresponding icon divide the Administration Manager's configuration.

7.1. Removing an Existing Menu

To remove an existing menu from the left pane list, please follow the steps below.

- 1. Select the menu you want to delete from the left Menus pane.
- 2. Press Del.

Note: this action will not delete the menu file from the hard disk, but only from the menu list.

7.2. Creating a New Menu

To create a new menu in the left **Menus** pane, please follow the steps below.

- 1. Select File> New> Menu, or right-click and select New> Menu.
- 2. Change the default "New Menu" name by the name you want.
- 3. Click Edit in the right pane. This action will launch the Click and DECiDE Web Menu and create an empty new menu, ready to be defined with the branches you need to create. See further Use of Click and DECiDE Web Menu.

7.3. Modifying an Existing Menu

To modify an existing menu which can be seen in the left **Menus** pane, please follow the steps below.



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- 1. Select the menu you want to modify in the left Menus pane.
- 2. Click **Edit** in the right pane. This action will launch Click and DECiDE Web Menu and will open the menu you selected to modify. Modify the menu as appropriate. See further Use of Click and DECiDE Web Menu.

7.4. Working with Click and DECiDE Web Menu

When Click and DECiDE Web Menu is launched the following screen appears.

| 20 | DemoWeb.wmu - Click and DECiDE Web Menu | א נ | |
|---------------------------|---|---------|--|
| i 🗅 💕 🖬 i 🕹 🛍 i 🔗 i | 👝 🖶 💭 🕀 🖳 🚷 😞 🔊 🚘 🎯 | | |
| Eile Edit Insert View Hel | lp | | |
| i root | | | |

The "root" in the central pane is not visible in the Web Portal, however you can modify it, replacing "root" by the name of the menu that you specified in the Administration Manager **Menu** tab.

The toolbar includes the following icons:

- inserts a New Folder, allowing you to create branches and sub-levels if necessary.
- inserts a Click&DECiDE Dynamic Query
- 💷 inserts a Click&DECiDE Dynamic Report
- Sinserts a Click&DECiDE Dynamic Cube (made with a 32-bit version)
- inserts a Click&DECiDE Static Query (a query that is already published in HTML format)

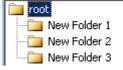
kinserts a Click&DECiDE Static Report (a report that is already published in HTML format)

- inserts a Click&DECiDE Static Cube (a cube that is already published in HTML format)
- inserts a link to a file (Excel, PDF, Word and so on.)
- inserts a URL or a link to a Dashboard.
- Inserts a link to Click&DECiDE Builder running on a specified Secured Data Source.
- inserts a Shared Folder.

7.4.1. Inserting a New Folder

To insert a new folder, please follow the steps below.

Click the Second Second



2. Create a sub-folder in the folder you want.



| 🚞 root |
|--------------------|
| 🛁 New Folder 1 |
| 🖻 🛅 New Folder 2 |
| 🔚 🔁 New Folder 2-1 |
| New Folder 3 |

3. Rename the folders as follows: Queries, Reports and Cubes.

| 🚞 roo | |
|----------|---------------|
| ···· 🛅 | Queries |
| ė. · · 🚞 | Reports |
| | 🛅 Sub-Reports |
| · 🛅 | Cubes |

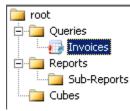
7.4.2. Inserting a Click&DECiDE Dynamic Query

To insert a dynamic query, please follow the steps below.

- 1. Select the **Queries** folder.
- 2. Click the 🔛 Dynamic Query icon in the toolbar to add a dynamic query.

| 🚞 root | |
|---------|-----------------|
| ė- 🧰 🧿 |)ueries |
| | 😼 Dynamic Query |
| 🚊 📴 🖪 | leports |
| · ···· | Sub-Reports |
| - E 🔁 🕻 | Iubes |

3. Rename the default name Dynamic Query with the name you want. For example Invoices.



- 4. Double-click the new Dynamic Query branch or click the in icon to open **Click and DECiDE Query** property sheet.
- 5. Click the **Browse...** button.
- 6. Select the required Click&DECiDE project file (*.wfv).
- Select the Invoices query in the proposed item list. This example uses the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
- 8. Replace the beginning of the path with an environment variable if necessary.





| Click and DECiDE Query |
|---|
| General Format Icon |
| Click and DECiDE project file name |
| %DATASET_DEMO%\DemoWeb\Click and Decide Web Demonstration.w |
| Browse |
| Item |
| Visible in browser |
| OK Cancel Apply Help |

- 9. Clear the **Visible in browser** check box if you want to hide this item in the Web Portal. In this example we are going to select the **Visible in browser** check box.
- 10. Click the Format tab to specify the authorized output formats.

Note: only the selected formats will be proposed to end users in the Web Portal. More information about the output formats is given in the Menu Web <u>Output Format</u> section.

11. Click **OK**.

7.4.3. Inserting a Click&DECiDE Dynamic Report

To insert a dynamic report, please follow the steps below.

- 1. Select the Reports folder.
- 2. Click the **Dynamic Report** icon 💷 icon.



3. Rename the default folder name **Dynamic Report** to the report name you want. For example **Sales by Area**.



4. Double-click the new **Dynamic Report** branch or click the into open the **Click and DECiDE Report** property sheet.





- 5. Click the Browse... button.
- 6. Select the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
- 7. Select the Sales by area report.
- 8. Replace the beginning of the path with an environment variable if necessary.

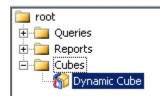
| Click and DECiDE Report | X |
|---|---|
| General Format Icon | |
| Click and DECiDE project file name | |
| %DATASET_DEMO%\DemoWeb\Click and Decide Web Demonstration.w | |
| Browse | |
| Item | |
| Sales by area | |
| Visible in browser | |
| OK Cancel Apply Help | |

- 9. Select the Visible in browser check box if you want the item to be visible in the Web Portal. Clear the check box if you want to hide this item in the. This option is used when a report calls another hidden report, however you need to know the URL report inside the Menu to create the hyperlink. (Refer to the Click and DECiDE Report Manual).
- 10. Click the Format tab to specify the authorized output formats. A report can be exported in HTML and PDF format with a WYSIWYG presentation and in Excel format when only data is exported, including breaks levels if exist.
- 11. Click OK.

7.4.4. Inserting a Click&DECiDE Dynamic Cube (V13.1 - 32-bit project)

To insert a dynamic cube, please follow the steps below.

- 1. Select the Cubes folder.
- 2. Click the Dynamic Cube 🚳 icon.



3. Rename the default name Dynamic Cube to the name you want. For example Sales by year and by Salesman.







- 4. Double-click the new Dynamic Cube or click the a icon to open the **Click and DECiDE Cube** property sheet.
- 5. Click the **Browse...** button.
- 6. Select the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
- 7. Select the Cube 1 Sales by Year and by Salesman cube.
- 8. Replace the beginning of the path with an environment variable if necessary.

| Click and DECiDE Cube | x |
|---|---|
| General Format Icon | |
| | |
| Click and DECiDE project file name | |
| %DATASET_DEMO%\DemoWeb\Click and Decide Web Demonstration.w | |
| Browse | |
| | |
| Item | |
| Cube 1 Sales by Year and by Salesman | |
| | |
| Visible in browser | |
| | |
| | |
| OK Cancel Apply Help | |

- 9. Select the **Visible in browser** check box if you want the cube to be visible in the Web Portal. Clear the check box if you want to hide the check box in the Web Portal.
- 10. Click the Format tab to specify the authorized <u>output formats</u>. A cube is mainly exported to HTML format. This allows the user to manipulate the dimensions and measures in the dynamic cube. Note: that exporting the cube to PDF format will generate a static PDF file with the cube inside but it will not be possible to use the condensed or detailed modes nor with the dimensions and measures. A cube can also be sent to Excel 2007, this is a new feature in Click and DECiDE version 10.1.
- 11. Click **OK**.

7.4.5. Inserting a Click&DECiDE Static Query

To insert a static query, please follow the steps below.

- 1. Select the Queries folder.
- 2. Click the Static Queries 🔤 icon.





| 🧧 root | |
|------------|--|
| | |
| - Invoices | |
| | |
| E Geports | |
| 🗄 🛅 Cubes | |
| | |

- 3. Launch Click&DECiDE Builder, select Start> All Programs> Click and DECiDE> Builder in the Start menu.
- 4. Open the Click and Decide Web Demonstration.wfv project file located by default in the C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal directory.
- 5. Open the **Customer file** query.
- 6. Export the query by selecting File> HTML> Publish to Web Portal.
- 7. Select the target directory in C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Publication. Note the following file name will be proposed Customer file.cndr
- 8. Click OK.
- 9. Rename the default name Static Query to Customer List.
- 10. Double-click the new static query or click the income is the click and DECiDE static Query properties property sheet.
- 11. Click the **Browse...** button.
- 12. Select the Customer file.cndr file located in the C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Publication directory.

| Click and DECiDE static Query properties | × |
|---|---|
| General Icon | |
| Static Query Path | |
| ts\Click and DECiDE Samples\Web Portal\Publication\Customer file.cndr | |
| Browse | |
| ✓ Visible in browser | |
| OK Cancel Apply Help | |

- 13. Select the **Visible in browser** check box if you want the static query to be visible in the Web Portal. Clear the check box if you want to hide the static query in the Web Portal.
- 14. Click **OK**.



| 2 | Untitled - Click and DECiDE We | eb Menu | _ = X |
|---|--------------------------------|-------------|-------|
| 🗄 🗅 💕 🖬 I 🐰 🗈 🙈 I | 🖀 i 👝 i 😔 👰 🚱 📑 | 🗟 🚷 🞯 🗦 📚 🖗 | |
| File Edit Insert View | Help | | |
| root Queries Invoices Customer List Reports Cubes | | | |

7.4.6. Inserting a Click&DECiDE Static Report

To insert a static report, please follow the steps below.

- 1. Select the **Reports** folder.
- 2. Click the Static Report 🔜 icon.

| 🧰 root | |
|---------------------------|--|
| | |
| | |
| Sub-Reports | |
| Sales by Area | |
| Static Report ⊡⊡ Cubes | |
| | |

3. Rename the default Static Report name with the name you want, for example Sales by Category.



- 4. Double-click the new static report or click the a icon to open the **Click and DECiDE Static Report Properties property sheet**.
- 5. Click the **Browse...** button.
- 6. Select the Sales by category.cndr file located in the C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Publication directory.
- 7. Optional: note that the path name using the Environment variable can be used.

%CND_BAI_SAMPLES%\Web Portal\Publication\Sales by category.cndr





| Click and DECiDE static Report properties | × |
|---|---|
| General Icon | |
| Static Report Path | |
| %CND_BAI_SAMPLES%\Web Portal\Publication\Sales by category.cndr | |
| Browse | |
| ✓ Visible in browser | |
| | |
| | |
| OK Cancel Apply Help | |

- 8. Select the **Visible in browser** check box if you want the static report to be visible in the Web Portal. Clear the check box if you want to hide this item in the Web Portal if necessary.
- 9. Click **OK**.

7.4.7. Inserting an URL or Click&DECiDE Dashboard

To insert a Click&DECiDE Google Chart Dashboard, please follow the steps below.

- 1. Select the root branch.
- 2. Click the **New Folder** icon to insert a new folder.
- 3. Right-click the new folder.
- 4. Select Rename and rename the folder with the name you want, for example **Dashboard**.
- 5. Select the new folder, in this example the **Dashboard** folder.
- 6. Click the 📚 icon to add an URL.



7. Go to the Web Portal and select in the BAI Demonstration menu, the Dashboard branch, then the Geo Chart Application sample:





| Browse BAI Demonstration Dashboards | | | |
|-------------------------------------|-----------------------|-------------------------|------|
| | | | Name |
| | Acces to Click&DECiE | E SAAS Demonstration | |
| | Geo Chart Application | | 1 |
| | Dashboard Applicatio | Open Open in new tab | |
| | 🗟 Other Dashboard Sar | Open in new window | |
| | | Save target as | |
| | | Print target | |
| | | Cut | |
| | | Сору | |
| | | Copy shortcut | |

- 8. Make a right mouse click and select Copy shortcut.
- 9. Rename the default name Dashboard with the name you want, for example USA Geo Chart in this example.



10. Double-click the new USA Geo Chart branch and paste the URL into the box: (removing the http://servername):

/DVWEB/Menus/Display.aspx?__ma=BAI+Demonstration&__mi=2558&__rp=Dashboard+Samples% 2fSales+by+Area.xgc

| URL properties | × |
|--|---|
| General Icon | |
| | |
| /DVWEB/Menus/Display.aspx?ma=BAI+Demonstration&mi=2558&_ | |
| | |
| ✓ Visible in browser | |
| | |
| OK Cancel Apply Help | |

11. Optional: click the Icon Tab and enter a picture name such as "googledevelopperlogo.png"





| URL properties | × | | | |
|---|---|--|----------------------|--|
| General Icon | | | | |
| Custom Icon: googledevelopperlogo.png | | | | |
| To customize the icon for this item, enter the icon flename. You must copy the icon file in each theme folder for which you want to customize the icon. (Default path is C:\inetpub\wwwroot\dvweb\App_Themes\Click and DECiDE\Images for the Click and DECiDE theme). You should have a better result with pictures of size 16x16. | | | | |
| | | | OK Cancel Apply Help | |

The picture is located into the Server in the directory C:\Program Files\Click and DECiDE\dvweb\App_Themes\Click and DECiDE\Images. You also can select another picture in this directory. (No path has been to enter, only the picture name).

12. Click OK to validate.

7.4.8. Inserting a Link to a File

To insert a link to a file, please follow the steps below.

- 1. Select the root folder.
- 2. Click the **New Folder** icon to insert a new folder.
- 3. Right-click the new folder.
- 4. Select Rename.
- 5. Rename the folder with the name you want, for example **Other**.
- 6. Select the new folder, in this example the **Other** folder.
- 7. Click the A Link to File icon to add a link to a file.

| 🚞 root |
|----------------|
| 🗄 🛅 Queries |
| 🗄 🛅 Reports |
| 🗄 🛅 Cubes |
| 🗄 🛅 Dashboard |
| 🖻 🛅 Other |
| Link to a file |

- 8. Right-click Link to a file.
- 9. Select Rename.
- 10. Rename Link to a file with the name you want, for example Sales by Salesman.



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| 🧰 root | |
|-------------------|--|
| 🕀 👘 Queries | |
| 🗄 💼 Reports | |
| 🖻 📲 Cubes | |
| 🖻 💼 Dashboard | |
| 🗄 🔚 Other | |
| Sales by Salesman | |

- 11. Double-click the new Sales by Salesman branch or click the interval icon to open the Link to a file properties property sheet.
- 12. Click Browse....
- 13. Select the **Sales by salesman.xls** file located in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.

| Link to a file properties | × |
|--|---|
| General Icon | |
| File Path | |
| %DATASET_DEMO%\DemoWeb\sales by salesman.xls | |
| Browse | |
| Mime Type | |
| Visible in browser | |
| OK Cancel Apply Help | |

- 14. Note that the corresponding Mime Type is automatically displayed, if the file is recognized.
- 15. Click the Mime Type arrow to expand the drop-down list.
- 16. Click OK.

7.4.9. Inserting a URL

To insert a URL, please follow the steps below. The URL could launch a query, a report, a cube, a <u>Dashboard</u> as describe before, a Web Site etc.

- 1. Select the **Other** folder.
- 2. Click the S Hyperlink icon to add a link to an URL.

| 🧰 root |
|-----------------------|
| 🗄 🛅 Queries |
| 😟 🧰 Reports |
| 😟 🧰 Cubes |
| 😟 🛅 Dashboard |
| 🖻 🛅 Other |
| - 🛃 Sales by Salesman |
| I 🤮 URL |
| |



- 3. Right-click URL.
- 4. Select Rename.
- 5. Rename the default name URL with the name you want, for example Click&DECiDE Web Site.

| 🧀 root | |
|-----------------------|--|
| 🗄 🛅 Queries | |
| 🗄 🛅 Reports | |
| 😟 🔁 Cubes | |
| 😟 🔁 Dashboard | |
| 🖹 🛅 Other | |
| Sales by Salesman | |
| Click&DECiDE Web Site | |

- 6. Double-click the new URL, in this example Click&DECiDE Web Site or click the 11 icon to display the URL Properties property sheet.
- 7. Enter the URL you need, for example http://www.clickndecide.com.

| URL properties | × |
|-----------------------------|------|
| General Icon | |
| | |
| | |
| http://www.clickndecide.com | |
| | |
| | |
| Visible in browser | |
| | ~~~ |
| | |
| | |
| OK Cancel Apply | Help |
| | |

8. Click OK.

7.4.10.Inserting a link to Click&DECiDE Builder

If your license certificate located in the Server machine authorizes you to use Clik&DECiDE Builder via the Web Portal, using a secured data source specified by your Administrator of the Administration Manager, you can add a link to use this application for those authorized users. To insert a link to Click&DECiDE Builder in the Web Portal, please follow the steps below.

- 1. Select the root folder.
- 2. Click the **Area New Folder** icon to insert a new folder
- 3. Right-click the new folder.
- 4. Select Rename.
- 5. Rename the new folder with the name you want, for example Click&DECiDE Builder.
- 6. Select the new folder, in this example the Click&DECiDE Builder folder.
- 7. Click the **Insert Dynamic Link to Click&DECiDE Builder** icon, to add a link to start Click&DECiDE Builder using a predefined secured data source, such as the one installed with Click&DECiDE BAI.





8. Right-click the default name **Builder Link**.

9. Select Rename.

- 10. Rename the Builder Link with the name you want, for example Click&DECiDE Builder on SQL Server.
- 11. Double-click the new Builder Link or click the income the Query Builder Link properties property sheet. Now this dialog box allows to select several Data Sources (declared as Data Sources with Security in Administration Manager) (new since version 2015)

| Query Builder link properties | × |
|---|---|
| General Icon | |
| Data Source ▲ Local SQL Server ▲ model1 ▲ ✓ Secured SQL Server ↓ Test ✓ Allow access to all secured Data Sources ✓ Misible in browser | |
| OK Cancel Apply Help | |

- 12. Select the required Data Source(s) from the Data Source drop-down list Note: the selected data source(s) must be a secured data source in the Administration Manager.
- 13. Optional: you can enable access to all secured Data Sources.
- 14. Click **OK**.

| 🫅 root |
|------------------------------------|
| 🗄 🔂 Queries |
| E Reports |
| 🗄 💼 Cubes |
| 🗄 📲 Dashboard |
| 🗄 📲 Other |
| 🗄 📲 Click&DECiDE Builder |
| Click&DECIDE Builder on SQL Server |
| |

Note: when the authorized end user clicks this link for the first time, they will be prompted to install Click&DECiDE Builder.

7.4.11. Inserting a Shared Folder

To insert a shared folder, please follow the steps below.

- 1. Select the **root** folder.
- 2. Click the Reference in the Provided Head Folder icon.



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- 3. Right-click the new Shared Folder.
- 4. Select Rename.
- 5. Rename the default name **Shared Folder** with the name you want, for example **My Shared Folder**.
- 6. Double-click the new Shared Folder, in this example My Shared Folder or click the into open the Shared Folder Properties property sheet.
- 7. Select the General tab.

| Shared folder properties | × |
|--|------|
| General Click and DECIDE Format Icon | |
| Folder path | |
| • %DATASET_DEMO%\DemoWeb\Shared Folder | ► |
| ✓ Display sub folders | |
| Hide Empty Directories | |
| Files to display | |
| Show files | |
| Hide files | |
| Hide extension | |
| Visible in browser | í I |
| | |
| OK Cancel Apply | Help |

- 8. Click Browse.
- Select the Folder Path corresponding to the directory you want to be used as a Shared Folder, example C:\Program Files\Click and DECiDE\BAI\DemoWeb\Shared Folder or using the Environment variable %DATASET_DEMO%\DemoWeb\Shared Folder.
- 10. Click **Display sub folders** if you want to see all the sub-folders.
- 11. Click Hide Empty Directories if you want to hide them.
- 12. Note that by default **Show files** will show all files including Click&DECiDE Builder project files. To limit the files shown, you can enter specific files and/or items beginning with a string. For example:

Show files = B*;W* will only display directories, files or Click&DECiDE Builder project files beginning with a B or W. Show files = *.wfv;*.pdf will display files with the wfv or pdf extensions. (Use a semicolon as separator). Note that *. will display directories names.



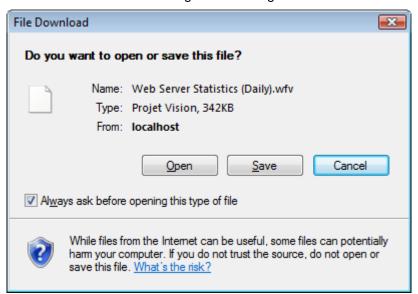
Hide files = *.lst;*.cub will hide files with the lst or cub extensions. (Use a semicolon as separator). Note: queries, reports and cubes can be hidden directly from a Click&DECiDE Builder project file using the Visible property set to No for each required item.

Hide extension: select this check box if you want to hide all file extensions.

13. Select the Click and DECiDE tab:

| Shared fo | lder properties | × |
|-------------|--|---|
| General | Click and DECiDE Format Icon | |
| This DEC | page lets you define the shared folder behaviour for Click and iDE projects (files with the .WFV extension) Enable browsing in Click and DECiDE project files (If this option is not checked, files with .WFV extension will be treated as regular files). | |
| | Show item type as sub-directory | |
| | | |
| | OK Cancel Apply Help | |
| | OK Cancel Apply Help | |

14. Select the Enable browsing in Click and DECiDE project files check box, if you want to display the content of each visible project file in the shared folder. If you clear this check box the project file will behave as a standard file and the user will get the message about the file download.



If the Enable browsing in Click and DECiDE project files check box is selected, then you can see all the queries, reports and cubes in the same branch.

- 15. Enable the Show Item Type as Subdirectory check box if you want to see three distinct branches to separate queries, reports and cubes.
- 16. Select the Format tab.





Select the output format you want to authorize for all project items (queries, reports and cubes).
 Note: refer to the <u>Output Format</u> section later in this document.

| Click and DECiDE Report | × |
|--|---|
| General Format Icon | |
| HTML report PDF report ASCII ASCII List ASCII Sequential | |
| OK Cancel Apply Help | |

18. Click OK.

7.4.12. Inserting a Shared Folder by Group

Under Windows Authentication, you can insert a Shared Folder that will create automatically a sub-directory for each recognized Windows User Groups, such as Administrators, Users, Domains Users, etc.

To do so, create a <u>shared folder</u> as describe in the previous paragraph but change the target path adding **<GROUP> (in Uppercase characters)** in the path:

%CND_BAI_SAMPLES%\Web Portal\Shared Folder\<GROUP>

If you are a User belonging to the User Group whose name in Windows is "Users", then, when accessing this Shared Folder, you automatically will see the list of the Group(s) you belong to:

| â Browse | BAI Demo | nstration Shared I | olderBy Group | [Didier] Logout |
|----------|----------|--------------------|-----------------|-----------------|
| Name | Size | Modification | Cre | ation |
| & USERS | 0 12/0 | 8/2013 15:58:25 | 12/08/2013 15:5 | 8:25 |

And when you click on one of these Groups, you see the content authorized of this Group:

| Browse BAI Demonstration | Shared | FolderBy Group | USERS [Didier] Logo |
|---------------------------------|-----------|---------------------|---------------------|
| Name | Size | Modification | Creation |
| ClicknDECiDE_BAI_Data_Sheet.doc | 2 232 428 | 08/08/2013 20:51:54 | 12/08/2013 15:11:05 |
| ClicknDECiDE_BAI_Data_Sheet.pdf | 393 611 | 08/08/2013 20:51:54 | 12/08/2013 15:11:05 |
| Daily Report 130812.pdf | 53 070 | 12/08/2013 15:28:20 | 12/08/2013 15:28:19 |
| My first google chart.xgc | 1 161 | 12/08/2013 15:18:54 | 12/08/2013 15:18:54 |

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Note: this <GROUP> also will be used by the "File" > "Open" and the "File" > "Save As" commands from the "Create" main command in the Web Portal, used to manage the Google Charts Applications. (Refer to the Google Chart User Manual for more information).

Note also that this <GROUP> can be used when defining a Task in the Destination Directory Path:

| | Destination | |
|-----------------------|--|---|
| Output Format: | PDF O HTML O Others Excel XL5 | |
| Destination Directory | BAI Demonstration Dashboards Shared Folder Shared Folder By Group USERS Shared Folder By User BAI Tools Web Portal Statistics | The <group> syntax in the destination directory</group> automatically display the Windows User Groups defined in C&D Administration Manager you belong to. |

(Refer to the Web Portal User Manual for more information).

7.4.13. Inserting a Shared Folder by User

Under Windows Authentication, you can insert a Shared Folder that will create automatically a sub-directory for each recognized Windows User, such as Administrator, Georges, Mary, Alicia, John etc.

To do so, create a shared folder as describe in the previous paragraph but change the target path adding <USER> (in Uppercase characters) in the path: %CND BAI SAMPLES%\Web Portal\Shared Folder\<USER>

If you are a Windows User then, when accessing this Shared Folder, you automatically will only see the content of the Subdirectory corresponding to your Name (User-ID): For example the current connected User is "Didier":

| â | Browse BAI Demonstration Shared Folder By User [Didier] Logout | | | | | | |
|---|--|--------|---------------------|---------------------|--|--|--|
| | Name | Size | Modification | Creation | | | |
| | Central Result Last Quarter.pdf | 58 350 | 12/08/2013 16:36:32 | 12/08/2013 16:36:32 | | | |

And here, with the Same Destination Directory "Shared Folder by User", the Administrator User will see the content of the "Administrator" Subdirectory:

| Browse BAI Demonstration Shared F | Folder By User | [Administrator] Log |
|--|-----------------------------|----------------------|
| Name | Size Modification | Creation |
| DicknDECiDE IBM iSeries Data Sheet.pdf | 271,997 8/8/2013 8:51:54 PM | 8/12/2013 4:56:17 PM |
| Monthly Report 1308.pdf | 53,070 8/12/2013 3:28:20 PM | 8/12/2013 4:55:03 PM |
| Technical Guide.docx | 1,161 8/12/2013 3:18:36 PM | 8/12/2013 3:16:47 PM |
| Test google chart.xgc | 1,161 8/12/2013 3:18:54 PM | 8/12/2013 4:55:03 PM |

Note: this <USER> also will be used by the "File" > "Open" and the "File" > "Save As" commands from the "Create" main command in the Web Portal, used to manage the Google Charts Applications. (Refer to the Google Chart User Manual for more information).

Note also that this <USER> can be used when defining a Task in the Destination Directory Path:



| | Destination |
|--------------------------|--|
| Output Format: | PDF O HTML O Others Excel XLS The <user> syntax in the Destination Directory will</user> |
| Destination Directory | BAI Demonstration/Shared Folder By User Directory whose name is the Current Connected User ID. |
| Destination File | South Result For Last Quarter.pdf × |
| Suffix | None + |

7.4.14. Inserting a Calendar Shared Folder (New since version 15.1)

Click&DECiDE Web Portal allows to manage a special Shared Folder containing files having a calendar suffix using the Y, M and D characters so that a Year, a Month or a Date can be recognized.

In the BAI Demonstration Menu you can see a new "Calendar Folder":

| Shared Folder | |
|--------------------|--|
| Calendar Folder | |
| My Group Folder | |
| Can My User Folder | |

A Calendar Folder is made as a Standard Shared Folder describe previously in this Manual, but now a new Tab named "Calendar View" can be enabled:

| | Shared folder properties | × |
|---|---------------------------|---|
| General Click and DECIDE | Format Calendar View Icon | |
| Browse this Folder as a C Date Reference | Calendar | |
| Daily Files | | |
| Standard File Na | ame (*_%y%m%d.*) | |
| Custom Filtering | *_%y%m%d.* | |
| Monthly Files | | |
| Standard File Na | ame (*_%y%m.*) | |
| Custom Filtering | *_%y%m.* | |
| Yearly Files | | |
| Standard File Na | ame (*_%y.*) | |
| Custom Filtering | *_%y.* | |
| | | - |
| | OK Cancel Apply Help | |

Enable the option "Browse this folder as a Calendar" to make this shared folder as a Calendar Folder.

If you wish to see a calendar icon in this Menu Branch, just add the picture name "calendar.png", already existing in each Web Portal Theme, in the Icon Tab:





| | | Share | ed folder pro | operties | × |
|-------------------------------|--|---|-----------------------|--|---|
| General | Click and DEC | CiDE Format | Calendar View | Icon | |
| | | calendar.png | | | |
| You cust C:\ir for t | must copy the omize the icon. hetpub\wwwroo he Click and DB | icon file in each . (Default path is ot\dvweb\App_ ECiDE theme). | s _Themes\Click ar | r which you want to and DECiDE\Images | |
| You | should have a | better result wit | h pictures of size | e 16x16. | |

The **Daily Files** will be recognized if their prefix contains the Year, the Month and the Day information as specified in the "Daily Files" frame (Standard means for example Firewall_Daily_YYMMDD.pdf, or Sales for the Day_YYMMDD.xlsx etc.).

The **Monthly Files** will be recognized if their prefix contains the Year and the Month information as specified in the "Monthly Files" frame (Standard means for example Firewall_Monthly_YYMM.pdf, or Sales for the Month_YYMM.xlsx etc.)

The **Yearly Files** will be recognized if their prefix contains the Year information as specified in the "Yearly Files" frame (Standard means for example Firewall_Yearly_YY.pdf, or Sales for the year_YY.xlsx etc.)

For each level, you can customize the suffixes you need if necessary.

| | | Shared | l folder prop | perties | | | × |
|---------|---|----------|---|---|---|------------------------|---|
| General | Click and DECiDE | Format C | Calendar View | con | | | |
| Date | wse this Folder as a C Reference illy Files Standard File Na © Custom Filtering | | - | | | | |
| Mc | Orthly Files Standard File Na Ocustom Filtering | | Date Parse %d : Day of m.¶ %m : Mont %y : Year w | f month as h as decin vithout cer | s decimal nu nal number ntury, as dec y, as decima | (01 - 12) imal numb | - |
| Ye | Yearly Files | | | | | | |
| | | 0 | K Car | ncel | Apply | Help | |

As you can see in the Tooltip:

The Year %Y can be with century, as decimal number (4 digits)

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The Year %y can be without century, as decimal number (2 digits) between 00 and 99

The Month %m must be as decimal number (2 digits) between 01 and 12

The Day %d must be as decimal number (2 digits) between 01 and 31

<u>Warning</u>: if you define for example the Custom Monthly Filtering as *_%y%m.* (with 2 digits for the year) and the Custom Yearly Filtering as *_%Y.* (with 4 digits for the year), then you could have sometimes a similar and confusing value such as this example:

Custom Monthly Filtering = 2004 supposed to be year 2020 and Month of April

Custom Yearly Filtering = 2004 supposed to be the year 2004

The rule is the following: "the program will test first if the value matches the Daily filter, then if the value matches the Monthly filter and then if the value matches the Yearly filter".

In the above example a file named Sales_for_2004.pdf will be first considered as being a Monthly Filter and not a Yearly Filter. If you really want this file to be recognized as a Yearly filter, modify the Custom Monthly Filter as follow: *_%Y%m.* (with 4 digits for the year).

Example installed with the Demo Database: click the "Calendar Folder" in the BAI Demonstration Menu and click the YEAR button: the result should look like the following picture if current year is 2015:



Each white square with a number of the day is corresponding to a Daily File having the suffixes defined in the Web Menu, so you immediately see where are the days with such files. If you click on of these squares, you open the content. Example if you click on November 16th, 2015: that will open this PDF file.

| | Sales for the I | Day 16/11/2015 | |
|--|------------------------|----------------|----------|
| Area 🔐 | Code Salesman name III | Date II | |
| SOUTH | | | |
| SOUTH | 3 Jean Martin | 16/11/2015 | |
| | | 2015 | |
| | Jean Martin | | \$ |
| SOUTH | 16 Kim Johnson | | |
| | | 16/11/2015 | |
| | | 2015 | |
| | Kim Johnson | | \$4 |
| SOUTH | | | \$11: |
| General total: Generated Report File: SALES | 151116.pdf | 🕂 🗔 🔍 🔍 | -) 🕞 11: |

Then you can navigate using the following arrows:





If you see a Daily File as the above example, November 16th, 2015 and click the middle arrow, you will jump to the November Monthly file (if exists):

| | Sales for the year 2015 and | for the Month of November | |
|------------|-----------------------------|---------------------------|-----------------------------|
| Area 📲 | Code Salesman name 💵 | Date II | Amount |
| NORTH-WEST | | | |
| NORTH-WEST | 11 Joe Kramer | | |
| | | 13/11/2015 | \$58 545,00 |
| | | | **** |
| | | 14/11/2015 | \$69 924,50 |
| | | 14/11/2015 2015 | \$69 924,50 \$128 469,50 |
| | Joe Kramer | | 1 |

but if you are currently seeing a Monthly File (November 2015) and click the middle arrow, you will jump to the Yearly File for the year 2015 (if exists):

| | Sales for th | ne year 2015 | M. |
|----------|----------------------|--------------|--------------|
| Area 📶 | Code Salesman name 💵 | Date II | Amount |
| ATLANTIC | | | |
| ATLANTIC | 4 Diane Meyer | | |
| | | 05/01/2015 | \$73 605,00 |
| | | 06/02/2015 | \$76 953,18 |
| | | 16/03/2015 | \$79 194,50 |
| | | 22/03/2015 | \$58 776,00 |
| | | 10/06/2015 | \$231 969,40 |
| | | 12/08/2015 | \$77 918,20 |
| | | 13/09/2015 | \$200 328,20 |
| | | 13/10/2015 | \$67 712,00 |
| | | 2015 | \$866 456,47 |
| | Diane Meyer | | \$866 456,47 |
| ATLANTIC | 12 Karen Walker | | |
| | | 06/02/2015 | \$88 093,74 |

if you are currently seeing a Yearly File (Year 2015) and click the right arrow, you will jump to the next Yearly File for the year 2016 (if exists) etc.

Go back to the Calendar Folder branch; if you click the Month button, you will see all the days of the current month (or selected month):

| Today Month Year Su Mo Tu Su Fr Sa Su Mo Tu We Th Fr Sa A A 5 6 A 7 A A 9 A 11 A 5 6 21 A 5 A A A 5 A A A 5 A <td< th=""><th></th><th>🔒 Browse</th><th>BAI Der</th><th>nonstration</th><th>Calendar I</th><th>Folder</th><th></th></td<> | | 🔒 Browse | BAI Der | nonstration | Calendar I | Folder | |
|---|----|----------|---------|--------------|--------------|--------|----|
| Su Mo Tu We Th Fr Sa 4 | | Today | м | onth | r ear | | |
| 4 | | | | October 2015 | | | 6 |
| Image: second | Su | Мо | Tu | We | Th | Fr | Sa |
| Image: second | | | | | | | |
| 11 12 13 14 15 16 | | | | | | | |
| Image: second | | | | | 8 | | 1 |
| | | | | | | | |
| | | | 17 | | | | |
| 18 19 20 21 22 23 | | | 13 | | | | |
| 18 19 20 21 22 23 | | | | | | | |
| | | | | 21 | | | |
| | | | | | | | |
| 25 26 27 28 29 30 | | 26 | 27 | | | 30 | |

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Note that the current day is the one having a red frame.

You can click the left or right arrow to go to the previous or next month.

If you click the Today button, you will jump to the Monthly view containing the current date:

| â Browse | BAI Demonstration | Calendar Folder |
|----------|-------------------|-----------------|
| Today | Month | ear |

Calendar folder with sub-directories:

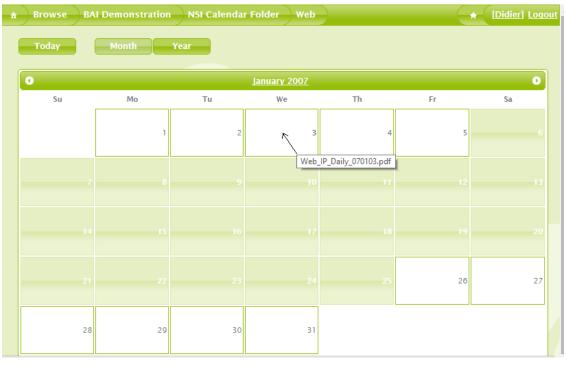
Since version 15.2 the Calendar Folder automatically manage the sub-directories if exist.

In the BAI Demonstration Menu, you can see a standard Shared Folder allowing to access the Cick&DECiDE Network Security Intelligence directory, displaying several sample PDF files for various equipment's:

| Browse BAL | Demonstratio | n Shared Folder Network Sec | curity Intelligence | → [Didier] Loc |
|-------------------|--------------|-----------------------------|----------------------|--|
| Name | Size | Modification | Creation | |
| 🫅 Email | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | |
| 🚞 <u>Firewall</u> | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | te 🔁 🛋 |
| 🚞 IPS | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | T |
| Proxy | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | te 🗐 🚽 |
| | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | te a constante da constante constante da con |
| 🚞 <u>Web</u> | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | te de la companya de |
| 🚞 <u>WMI</u> | 0 | 8/18/2015 9:20:33 AM | 8/18/2015 9:20:33 AM | te a constante de la constante |

If we define a new Calendar folder on this location:

%CND_BAI_SAMPLES%\Web Portal\Shared Folder\Network Security Intelligence we can navigate in each sub-directory and see the PDF files according to their dates and suffixes in a Calendar View mode. Example if you select the Web sub-directory you should see several files for January 2007 and February 2007:



On each file a tooltip displays the file name if you place the mouse on a date with a file.

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Calendar folder with different file names:

If a Calendar folder contains several file families, with different names for the same suffix (same date or same month or same year), since version 15.2 the Calendar Folder will automatically display each file family separately:

Example: in a same directory we have a first file family with file names such as SALES_YYMM.PDF and another file family with file names such as ORDERS_YYMM.PDF, and also some SALES_YYMMDD.PDF and ORDERS_YYMMDD.PDF and some SALES_YY.PDF and ORDERS_YY.PDF.

The Calendar Folder will display all these files as follow: If you click the Year Level, you will see all the Months of the current year with some white squares on the dates having some files with expected suffixes: example for October 2015

| Year | | |
|--|---|--|
| | <u>20</u> | <u>15</u> |
| <u>February</u> | <u>March</u> | <u>April</u> |
| Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 2 23 24 25 26 27 28 | No Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 31 31 31 31 | Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 30 |
| August | <u>September</u> | October |
| Su Mo Tu We Th Fr Sa | Su Mo Tu We Th Fr Sa | Su Mo Tu We Th Fr Sa |
| | | 4 5 6 7 8 9 10 |
| | 13 14 15 16 17 18 19 | 11 12 13 14 15 16 17 |
| | | 18 19 20 21 22 23 24 |
| 23 24 25 26 27 28 29 30 31 | 27 28 29 30 | 25 26 27 28 29 30 31 |
| | | |

If you place the mouse on a white square, the list of the found files appears in a Tooltip:

| | | 0 | ctober | | | | | | No | vembe | |
|----|----|----|--------|----|----|-------|----------|------|----|-------|--|
| Su | Мо | Tu | We | Th | Fr | Sa | Su | Мо | Tu | We | |
| | | | | | | | | | | | |
| | | | | | 9 | 10 | | | | | |
| | 12 | 13 | | | | 17 | 15 | 16 | | | |
| | | 20 | 21 | | | ORDER | S_151010 | .pdf | | | |
| | 26 | 27 | | 29 | 30 | SALES | 151010.p | ατ0 | | | |

If you click on a white square, the files are displayed so that you can now select one of them to open it:

| Browse BAI Demonstration | I Various Cal | endar Folder 10/10/2015 | | (Didier) Logo |
|--------------------------|---------------|-------------------------|-----------------------|---------------|
| Name | Size | Modification | Creation | |
| CRDERS_151010.pdf | 56,057 | 10/13/2015 10:46:16 PM | 10/27/2015 2:14:43 PM | |
| 5ALES_151010.pdf | 56,057 | 10/13/2015 10:46:16 PM | 10/27/2015 2:14:30 PM | 1 |
| | | Create Folder | | |

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You can now open for example the ORDERS_151010.PDF file, then navigate to the next or previous file whose name also begins with ORDERS_.

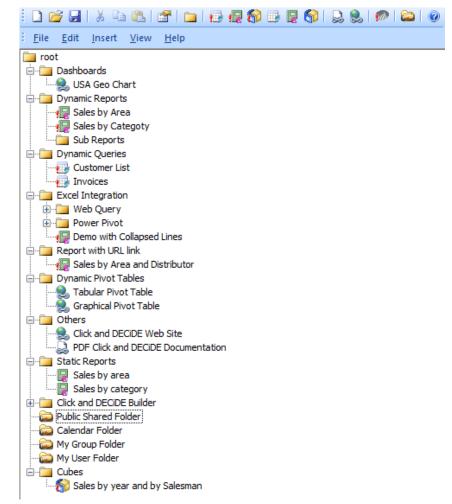
7.5. Saving and applying a Menu

To save and apply a menu, please follow the steps below.

1. Select File> Save As or File> Save or click the 🛃 Save icon to save your menu with the file extension *.wmu.

Note: each time you save a menu, it is not necessary to update the security via the Click&DECiDE Administration Manager as this menu file is a separate file. You only need to update the security if you modify the Menu list or Menu assigned to one or several User Groups.

2. Enter the menu name as appropriate, for example My Menu.wmu:



- 3. Go back to Administration Manager.
- 4. Select the Menu tab.
- 5. Add a new menu in the left Menus pane.
- Change the name to the name you want, in this example **My Menu** in the right pane. 6.
- 7. Click ... browse to search for your menu, in this example the menu saved as My Menu.wmu.





| ≟ <u>F</u> ile <u>E</u> dit <u>V</u> iew | <u>T</u> ools <u>H</u> elp | | |
|--|--|-------|---|
| : 🖪 X 🖻 🛍 | ୬ 🗠 @ 🏂 💫 🛃 🦚 🖏 | | |
| Menus | | | |
| Menus | Menu Path | Name: | [|
| BAI Demonstration | BAI Demonstration %CND BAI SAMPLES%\Web Portal\DemoWeb.wmu | | My Menu |
| BAI Tools %CND_BAI_SAMPLES%\Web Portal\DemoTools.wmu | | | CND RAT CAMPLECK/Wash DestallMrs Means summer |
| Web Portal Statistics %CND_BAI_SAMPLES%\Web Portal\Web Server Statistics.wmu | | Path: | 6CND_BAI_SAMPLES%\Web Portal\My Menu.wmu |
| My Menu | %CND_BAI_SAMPLES%\Web Portal\My Menu.wmu | | |
| | | | |

- 8. Click the new menu you've just created in the left **Menus** pane, in this example the **My Menu** row to see the Menu **Path**.
- 9. Modify the path with an environment variable in the Path text box in the right pane.
- 10. Select the User Group tab:

| É <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp | | | |
|--|---------|-------------------------|--|
| i Q X 🗈 🛍 🍠 🝽 🎯 i 🏂 💫 📲 🦚 | <u></u> | | |
| User Groups | | All Menus | |
| | | Description | Menu Path |
| in the second se | | BAI Demonstration | %CND_BAI_SAMPLES%\Web Portal\DemoWeb.wmu |
| E- Sers | _ | 📥 BAI Tools | %CND_BAI_SAMPLES%\Web Portal\DemoTools.wmu |
| | | 🚞 Web Portal Statistics | %CND_BAI_SAMPLES%\Web Portal\Web Server Statistics.wmu |
| | | 🔚 My Menu | %CND_BAI_SAMPLES%\Web Portal\My Menu.wmu |
| BAI Demonstration | | | |
| BAI Tools Drag and dr | op you | r Menu to | |
| Web Portal Statistics the "Menu 2 | Access' | ' branch | |
| My Menu for the Grou | up that | will have | |
| Borness to th | - | | |
| Rights | | | |
| ⊕ & Administrators | | | |

- 11. Move the menu you created from the right **All Menus** pane to the **Menu Access** branch in the left **User Groups** pane using a drag-and-drop operation. In this example we are going to move the **My Menu** menu.
- 12. Click File> Update Database Security or click the **O Update** icon.
- 13. Launch the Web Portal, select **Start> All Programs> Click and DECiDE> Web Portal**.
- 14. Disconnect and reconnect if you need to reload the menu list in the Web Portal. The new menu, in this example **My Menu** menu will appear if you are a user belonging to the corresponding User Group.





| ← → @ http://localhost/dvweb/D | efe 🄎 🗕 🖒 🌈 Click and DECiDE Web Portal 🗙 | - □ × ⋔★☆ |
|--|---|-----------------|
| ✓ Browse | | [Didier] Logout |
| BAI Demonstration BAI Tools BAI Tools My Menu Dashboards Dynamic Reports Dynamic Queries Excel Integration Report with URL link Dynamic Pivot Tables Others Static Reports Click and DECIDE Builder Shared Folder Shared Folder My Group Folder Cubes Web Portal Statistics | Menus Browse Configure Schedule Create Publish ✓ Create Sales for the current Mo Most Recent Sales for ea Sales to Excel | ard |
| Configure | | |
| Schedule Create | | |
| → Publish | CLick& OSC(OS Copyright Click&DECIDE 2010-2014 Support Terms & Conditions | 2 |

Or, if you start the Web Portal with <u>http://servername/dvweb/home.aspx</u> or hide the Left Pane you will see the Web Portal as follow:

| â | | | [Didier] Logo |
|-------------|--|---|---------------|
| 🖀 Menus | ★ Favorites | | 1 |
| Browse | Ann Kapmer Apport | Max Date for a Selesman Max For a Selesman Internet 1000 000 Internet 000 000 | 00 |
| ★ Configure | Michael Description Description <thdescription< th=""> <thdescription< th=""> <th< th=""><th>04 1020 10200 44 1020 10200 45 1020 10200 45 1020 10200 45 10200 10200 45 10200 10200 46 10200 10200 46 10200 10200 46 10200 10200 46 10200 10200 47 10200 10200 48 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200</th><th></th></th<></thdescription<></thdescription<> | 04 1020 10200 44 1020 10200 45 1020 10200 45 1020 10200 45 10200 10200 45 10200 10200 46 10200 10200 46 10200 10200 46 10200 10200 46 10200 10200 47 10200 10200 48 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 49 10200 10200 | |
| © Schedule | Sales for the current M | Most Recent Sales for | Dashboard |
| ✓ Create | | | |
| n Publish | Sales to Excel | | |
| ୍କ News 👁 ୯ | | | |

And if you click the **Browse** button, the menus will appear as follow:

| n Browse | | ★ [Didier] Logout |
|--------------------------------|------|-------------------|
| | Name | |
| BAI Demonstration | | |
| BAI Tools | | |
| My Menu | | |
| 🛓 <u>Web Portal Statistics</u> | | |

15. Click the My Menu branch to display the Menu Content:

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| Browse My Menu | + [Didier] Logo |
|----------------------------|-----------------|
| Name | |
| ()Dashboards | |
| Dynamic Reports | |
| Dynamic Queries | |
| Excel Integration | |
| Carl Report with URL link | |
| Dynamic Pivot Tables | |
| Dthers | |
| Static Reports | |
| M Click and DECiDE Builder | |
| Shared Folder | |
| Calendar Folder | |
| My Group Folder | |
| 😂 My User Folder | |
| Cubes | |

16. Click any branch to display the Content:

| ★ [Didier] Logout |
|-------------------|
| |
| |
| |
| |
| |

or

| 🖈 Browse My Menu Dashboards | * [Didier] Logout |
|-----------------------------|-------------------|
| Name | |
| USA Geo Chart | |
| | |

Just click the "My Menu" in the main bar to come back to the Menu List.

7.6. Working with Advanced Menu Functions

7.6.1. Working with the Options Dialog Box

When you select **View> Options**, the **Options** dialog box appears. This dialog box allows you to define general options for the Menu program for the work directories for the following files:

- Click&DECiDE Builder project files (*.wfv)
- Click&DECiDE Menu files (*.wmu)



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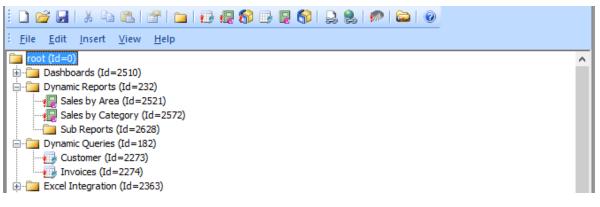


7.6.2. Using the Show ID Command

Select View> Show ID to display the unique ID given to each Menu Item. Each branch will automatically be attributed a menu ID.

| 3 My Menu.wmu - Click and DECiDE Web Menu | - | | × |
|--|-----|-----|------|
| i i i i i i i i i i i i i i i i i i i | | | |
| Ready | CAP | NUM | SCRL |

Each sub-branch or final item is also attributed a specific menu ID.



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7.6.3. Building a Report URL for a Drill-Down to Another Report

If you want to jump from one report to another, for example if you want to create drill-downs in your reports, then you will need to use URLs. The IDs we saw in the above section are used in the URL that you create for drill-down links. In this example we are going to create a URL to enable use to jump from the Sales by Area report (Id=9 in the above menu) to another report, located in the Sub-Reports branch.

Exercise 1:

- 1. Add the **Demo Multicriteria** report into the **Sub-Reports** branch.
- 2. Note the following menu with the Menu Id = 2632 appear for this report.



3. Specify the report to be run and the output format you need (PDF for example)

| neral Format Icon | |
|---|-----------------------|
| Click and DECiDE project file name | |
| _BAI_SAMPLES%\Web Portal\Click and Decide | Web Demonstration.wfv |
| | Browse |
| ltem | |
| Demo_Multicriteria | |

- 4. Save this Menu
- 5. Launch the Web Portal.
- 6. Display this branch via the Web Portal:

| 4 | Browse My Menu Dynamic Reports Sub Reports | * [Didier] Logout |
|---|--|-------------------|
| | Name | |
| | n Demo Multicriteria | |
| | | |

- 7. Click the demo_multicriteria sub-report.
- 8. Select any area for the first criteria.
- 9. Leave IGNORE (for all values) for the Salesman criteria.
- 10. Leave IGNORE for the Date criteria (the default values will be used later):



| 🖈 📄) My Menu 📄 Dynamic Reports 🔵 Su | b Reports Demo Multicriteria | + [Didier] Logo |
|--|------------------------------|-----------------|
| ✓ Area? | ATLANTIC | |
| Salesman Name: | IGNORE | |
| Date? (Use key words or a calendar date) | IGNORE | |
| Output Format: PDF O HTML | | |
| > Share | | |

- 11. Click the Share button.
- 12. You get this URL given by the Web Link to this page:

| ▼ Share | | | |
|---|------------|--|--|
| Web Link to this page | | | |
| Display Parameters O Display Result O Download Link | 🗌 Auto Run | | |
| http://localhost/dvweb/Menus/ShowParameters.aspx?ma=My+Menu&mi=2632&AREA_PARAM=ATLANTIC&f=PDF&e=0 | | | |
| | | | |

13. Change the link selecting **Display Result**:

| Web Link to this page | | | | |
|--|---------------------|--|--|--|
| O Display Parameters | Show Naivgation Bar | | | |
| http://localhost/dvweb/Menus/Display.aspx?ma=My+Menu&mi=2632&AREA_PARAM=ATLANTIC&f=PDF&e=0 | | | | |

- 14. Open the demo_multicriteria query using Click&DECiDE Builder.
- 15. Select Query> Parameters to open the Query Parameters dialog box.
- 16. Select the **AREA_PARAM** parameter.
- 17. Click the 🗎 Copy icon.

| 2 | Query Parameters | x | |
|----------------------|------------------|---|--|
| Parameters: | 🖾 🗙 🗲 🐇 🗈 🛍 🕴 | 2 | |
| AREA_PARAM | | | |
| SALNAME_PARAM | | | |
| P_DATE | | | |
| PropertyArea | | | |
| | | | |
| | | | |
| Parameter Properties | | | |
| Name | AREA_PARAM | | |
| Туре | String | | |

- 18. Close the query.
- 19. Open the Sales by area and distributor query that feeds the Sales by Area report.





- 20. Select Query> Parameters to open the Query Parameters dialog box.
- 21. Paste the parameter previously copied with the 🛱 icon.
- 22. Click OK.

| 2 | Query Parameters | × |
|--------------------------|--|----|
| Parameters: | 🖺 🗙 🗲 🕌 🛍 🛍 | 3 |
| PropertyArea | | |
| AREA_PARAM | | |
| | | |
| | | |
| | | |
| | | _ |
| | Parameter Properties | _ |
| Name | AREA_PARAM | Ψ. |
| Туре | String | |
| Status | Enable | |
| Update Method | Input Query List | |
| Title | Area? | |
| Mandatory | No | |
| Editable | Yes | |
| Default Value | IGNORE | |
| Query | DEFINE SOURCE "Secured SQL Server" TYPE src;DEFINE PARAM | |
| Selection | Extended | |
| Hide List's First Column | No | |

- 23. Click the leftmost column of the AREA field. The Criteria dialog box appears.
- 24. Click New to add new criteria on that field.
- 25. Enter the parameter name using the **Expression** tab.

| Value Column Expression Query AREA_PARAM | |
|---|-----------------------------|
| | |
| | |
| | Not Combine Uncombine |
| | Parameters |

- 26. Click OK.
- 27. Close and save the Sales by area and distributor query.
- 28. Open the Sales by Area report (based on this query).
- 29. Select the **AREA** field in the Group Header AREA.



- 30. Select the General tab in the Properties pod.
- 31. Enter the following URL in the Hyperlink text box.

='/dvweb/Menus/Display.aspx? ma=My+Menu& mi=2632&AREA PARAM='+AREA+'& f=PDF& e=1'

Note: using the copied URL we have replaced the beginning before /dvweb with a single quote, then replaced the AREA_PARAM =ATLANTIC with '...AREA_PARAM='+AREA+'...' and _e=0 with _e=1.

| | 🔟 Click and Decide Web Demonstration.wfv* 🖳 Sales by area* 💿 🔻 🗙 | Properties P | ı x |
|----|--|--|-----|
| | ······································ | Data or Formula : Data | |
| _ | | 4 General Format Data All | ⊳ |
| | ● 🖓 ቀł Report Header | Name Data | |
| | ● | Description Area | |
| Γ. | | Hyperlink =/dvweb/Menus/Display.aspx?ma=My+Menu&mi=26; * | |
| ŀ | Click&DECiDE | Bookmark | |
| Ŀ | | Highlight | |
| | | | |
| | • • Group Header AREA | | |
| | | | |
| ŀ | | | |
| · | | | |

ShowParameters.aspx will display the parameters and output formats.

Display.aspx will not display the parameters and output formats.

_ma=My+Menu is the Menu name.

_mi=2632 is the Menu ID for the called report.

'...**AREA_PARAM='+AREA+'...'** means that the parameter AREA_PARAM will take the content of the AREA field.

_e=1 means that the execution of the called report will be performed immediately without offering the Cancel button.

_e=0 means that the execution of the called report will be performed showing the Run and Cancel buttons.

_f=PDF: means that the output format for the called report will be Acrobat Reader, it could be modified to _f=HTML for example.

The URL can contain the following items:

| Long Syntax | Short Syntax | Description |
|---------------------|-----------------|--|
| Menu Items | | |
| mnu_alias | ma | Menu name |
| | ma | Example:ma=My+Menu |
| mnu_itemid | mi | Menu ID (number), example: &mi=28 |
| Shared Folder Items | | |
| relative_path | rn | Relative path to a Builder Project inside a Shared Folder |
| | rp | Example: &rp=Click+and+Decide+Web+Demonstration.wfv |
| | | File type in a Shared Folder |
| type | t | Example: &t=vision for a Builder Project file. If this parameter is missing the Builder Project File will be considered as a standard file a File Download dialog box will be displayed. |
| item type | it | Project Item Type in a Shared Folder (1=query, 2=report, 4=cube) |
| item_type | n | Example: ⁢=2 |



| item_name Parameters | in | Project Item Name in a Shared Folder Example: ∈=Demo_Multicriteria | |
|---------------------------------|---------------------------------|--|--|
| | | ¶matername=Value& if the value fixed | |
| | | '¶metername='+ ColumnName+'' if the value is returned by an alphanumeric query column | |
| <parameter name=""></parameter> | <parameter name=""></parameter> | '¶metername='+ Str(ColumnName)+'' if the value is returned by a numeric query column | |
| | | <pre>`&parametername='+ FormatDateTime('yyyy/mm/dd',ColumnName)+'' if the value is returned by a Date or DateTime query column</pre> | |
| | | '¶metername='+ ParamAsString('ParamDateName',[x])+'' if the value is returned by a Date or DateTime Parameter. x is optional and can take values from 0 to 3. (Refer to Click&DECiDE Report Manual). | |
| Output Format | | | |
| format | f | Output format (PDF, HTML or a C&D Builder output format) | |
| Execution | Execution | | |
| exec | е | 0 = display parameter list before to be run / 1 = run now. | |

- 32. Save the Sales by Area report.
- 33. Close the report.
- 34. Go back to the Menu.
- 35. Clear the **Visible in browser** check box to ensure the sub-report demo multicriteria is not visible in the Web Portal. (Note that you also can Hide the full branch Sub-Report).

| Click and DECiDE Report | × | |
|---|---|--|
| General Format Icon | | |
| Click and DECiDE project file name | | |
| _BAI_SAMPLES%\Web Portal\Click and Decide Web Demonstration.wfv | | |
| Browse | | |
| Item | | |
| Demo_Multicriteria | | |
| Nisible in browser | | |
| | | |
| OK Cancel Apply Help | | |

- 36. Click OK.
- 37. Or just Clear the **Visible in browser** option to hide the **Sub-Reports** branch.





| Folder properties | × |
|--------------------|------|
| General Icon | |
| Visible in browser | |
| | |
| OK Cancel Apply | Help |

- 38. Click File> Save to save the menu.
- 39. Go back to the Web Portal.
- 40. Disconnect and Reconnect to refresh the Menu
- 41. Note the Sub-Reports branch is now hidden.

| â | Browse My Menu Dynamic Reports | * (| [Didier] Logout |
|---|--------------------------------|-----|-----------------|
| | Name | | |
| | Sales by Area | | |
| | Sales by Category | | |
| | | | |

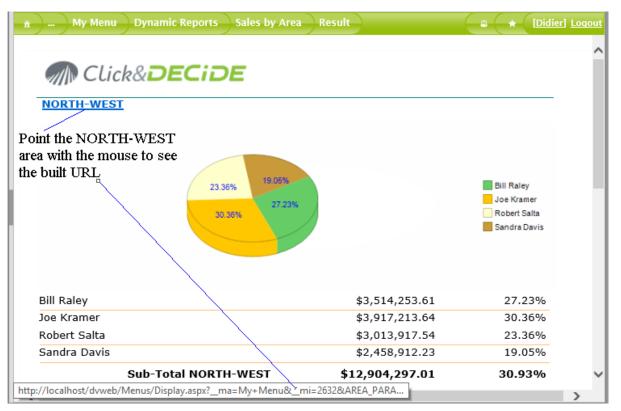
42. Click the **Sales by Area** dynamic report in the right pane.

| 🔒 Browse My Menu Dynamic Report | s Sales by Area | * [Didier] Logout |
|--------------------------------------|--------------------------|-------------------|
| Area? | IGNORE | |
| Output Format: PDF O HTML O Other: | | |
| → Share | | |
| Run | Export to File Save Task | |

- 43. Select several Areas or leave IGNORE.
- 44. Select PDF or HTML output format (but remember that the URL built contains __f=PDF)
- 45. Click Run to run the report.
- 46. Place the mouse in the Area field to display the URL as follows.







47. Click on NORTH-WEST for example. The Demo Multicriteria report will appear for the NORTH-WEST area:

| | | - | |
|---|---------------------------|------------------------------|-------------------|
| 긎 🗇 🎯 http://localhost/dvweb, 🔎 🗕 🖒 🎯 Click and E | DECiDE Web Portal × | í | n ★ ¤ |
| 🔒 🛄 My Menu 🔵 Dynamic Reports 🔵 Sales by Area | Result | | ier] <u>Loqou</u> |
| Report Demo Multi Cr | teria with 3 Break Levels | ATT. | ^ |
| Area II Code Salesman name II | Date II | Amount | |
| NORTH-WEST | | | |
| NORTHWEST 1 Bill Raley | | | |
| | 4/6/2014 | \$96,930.25 | |
| | 4/7/2014 | \$111,522.75 | |
| | 5/9/2014 | \$214,401.60 | |
| | 6/16/2014 | \$78,983.13 | |
| | 6/17/2014 | \$93,671.94 | |
| Cilleda terres and terres to a second terrela | 8/14/2014 | \$136,054.00 | |
| Click here or here to come back | 8/16/2014 | \$148,711.00 | |
| to the first non-ort | 10/30/2014 | \$123,008.50 | |
| to the first report | 10/31/2014 | \$136,210.50 | |
| | 11/9/2014 11/10/2014 | \$121,893.50 \$135.540.50 | |
| | 11/22/2014 | \$135,540.50 | |
| | 11/22/2014 | \$238,710.00 \$253,546,75 | |
| | 12/10/2014 | \$57,550.00 | |
| | 2014 | \$1,946,734.41 | |

Note that the new report can be generated in the same frame or in a new frame, according to the PDF Reader configuration, with a new Menu Bar, so you can either click the Result Tab to see again the Sales by Area result, or the Demo Multicriteria Tab to come back to the called report.

You can come back to the Sales by Area result by clicking the **Result Tab** or the **Browser Back button**.

7.6.4. Change Item IDs

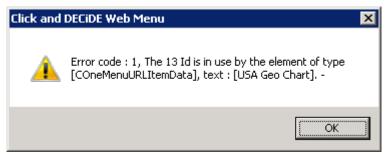
To change Item IDs, please follow the steps below.

1. Select the item whose ID you want to modify.





 Select Edit> Special>Change Item ID if you wish to modify the Id for this item. The new ID number must be a number that is not already used by another item, otherwise an error message will inform you that this number is already used.



3. Enter a valid new ID in the New ID box.

| Change Id | × |
|------------------------------|--------|
| Demo_MultiCriteria | Cancel |
| Current ID: 21 New ID: 25 | |

4. Click OK.

7.6.5. Checking Menu Integrity

To check a menu's integrity, please follow the steps below.

- 1. Select Edit> Special>Check menu integrity.
- 2. Note the success message appears if no problems are found.



3. Click OK.

7.6.6. Minimizing the Next ID Value

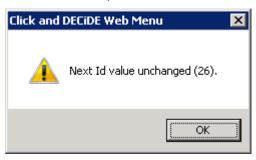
Each time you delete an item in a Menu or a Branch, the ID used is lost. If the highest menu Id was 32 and you remove the items with the ID numbers 29 to 32, the next time you add a new item, the ID number will be 33 because 32 was the last used.

To minimize the next ID value, please follow the steps below.

1. Remove the item ID you want, in this example 33.



- 2. Select Edit> Special>Minimize Next Id Value if you wish to reset the next ID value to the lowest possible.
- 3. Note the confirmation for the next ID value (this will be the first available number not already used).



Or, if you have removed the branch having the ID = 25, then the message could be:

| Click and | DECiDE Web Menu | × |
|-----------|----------------------------------|---|
| <u> </u> | Next Id minimized from 26 to 21. | |
| | OK | |

If there is no item using the IDs 22 to 25.

4. Click OK.

7.7. Defining Web Menu Output Formats

Each time you create a branch running a Click&DECiDE item (Query, Report or Cube), you can specify the authorized output formats. For example, if you want a report to only be exported to PDF format, or a Cube to only be exported to HTML format or to Excel Pivot Table, or a query to be exported to several formats, such as PDF, HTML, Excel and so on.

To define Web Menu output formats, please follow the steps below.

- 1. Click the **Item Properties** icon to define the item properties property sheet, for example, the **Click and DECiDE Query** property sheet.
- Select the Format tab to specify the authorized output formats, by clicking on the left part of the output format name:

| Click and DECiDE Quer | у | × |
|--|---|---|
| General Format Icon | | |
| HTML report PDF report ASCII ASCII List ASCII Sequential Atom | ~ | • |

Note: the output format list is the one that was installed with the Click&DECiDE Builder on the Server machine, and if the list has been customized, the modified formats or new available output formats will appear in this list.



- 3. Click OK.
- 4. Select File> Save.

7.7.1. Working with Output Formats without Options

Select HTML and/or PDF in the item properties Format tab if you wish the item to be exported later to these formats by the end user.

Note the special Atom output format that can be used if you wish to be able through the Web Portal to create some Power Pivot inside Excel 2010 or greater. Refer to the Click&DECiDE BAI Web Portal User Guide v2015 for more information, chapter 4.7.

| Click and DECiDE Query | | | × |
|--|---|-----------|---|
| General Format Icon | | | |
| ASCII List ASCII Sequential Ascii Sequential Atom Bigquery Csv Csv | < | () | |

Note the special **Bigquery** output format that can be used if you wish send data to the **Google Cloud** Database.

| Click and DECiDE Query | | | × |
|---|----------|-----------|---|
| General Format Icon | | | |
| ASCII List ASCII Sequential Atom Bigquery Csv (Isiondo) | ^ | () | |

Note the special Google Data Table output format that can be used if you wish to use the Google Dashboard running against already prepared data source files (*.gcd) giving a faster response time that a real-time connection to dynamic queries. Refer to the BAI Dashboard Google Chart User Guide for more information.

| Click and DECiDE Query | | | x |
|--|---|-----------|---|
| General Format Icon | | | |
| Excel XLSX Excel XLSX Big Data Google Data Table | ^ | () | |
| Local SQL Server Pivot Data Table DECT | > | | |

Note the special **Pivot Data Table** output format that will authorize through the Web Portal to see the Pivot Data Table output format, allowing to create dynamically a **Pivot Table**.





| Browse BAI Demonstration SI | hared Folder Tabular Pivot Table | The second secon |
|--|----------------------------------|--|
| Area? | IGNORE | |
| Salesman Name: | IGNORE | |
| Date? (Use key words or a calendar | IGNORE | |
| date) | | |
| Output Format: Other: Pivot Data Tab | | |
| → Share | | |
| | Run Export to File | |

Note the special **WebQuery** output format that can be used if you wish to be able through the Web Portal to see the special icon allowing to retrieve data in an Excel sheet using the corresponding URL in the command **Data> From Web** as describe in the ClicknDECiDE_BAI_Web_Portal_User_Guide_v2015.pdf manual, chapter 4.6.

| Click and DECiDE Query | | × |
|--|---|---|
| General Format Icon | | |
| □ RTF □ Text (Unicode) ✓ WebQuery XML | ^ | • |
| XML Big Data | ~ | |

7.7.2. Working with ASCII Output Formats with Options

All output formats such as ASCII, ASCII List, ASCII Sequential, CSV, RTF and so on, accept certain options such as a template target file and a write mode: ERASE or APPEND.

To work with ASCII output formats with options, please follow the steps below.

- 1. Click the item properties icon to display the item properties property sheet. For example, the **Click and DECiDE Query** property sheet.
- 2. Select the **ASCII** output format.





| Click and DECiDE Query | × |
|--|---|
| General Format Icon | |
| ☐ HTML report ▲ ☐ PDF report ▲ ☑ ASCII ▲ ☐ ASCII List ▲ ☐ ASCII Sequential ✓ | |
| Template File/Sheet Name Browse Write Mode or Cell[Mode]: | |
| OK Cancel Apply Help | |

3. Click Browse... to locate the ASCII template on your disk.

| Destination Information | × |
|---|--------------|
| File Name: C:\Users\Public\Documents\Click and DECiDE Sam Action: Erase content v | OK Cancel |

- 4. Select the Write Mode, either Erase content or Append content from the Action drop-down list.
- 5. Click OK.

| Click and DECiDE Query | × |
|---|---|
| General Format Icon | |
| HTML report PDF report ASCII ASCII List | |
| ASCII Sequential | |
| Template File/Sheet Name nents\Click and DECiDE Samples\Web Portal\DestAsciiWeb.bt Browse | |
| Write Mode or Cell[Mode]: ERASE | |
| OK Cancel Apply Help | |

6. Select File> Save to save your menu to apply the changes.

Note: when the end user runs this query later and selects ASCII as the output format, the data will be sent using a copy of the template file and using the specified write mode. If the template file contains, for example





a row with all header column names, the **Append content Action** option must be used, because the **Erase content** mode will generate a new ASCII file without the header row.

7.7.3. Working with Excel Output Formats with Options

The Excel XLS and Excel XLSX output formats accept certain options such as a template file name, a Sheet name, the destination cell and the write mode as follows.

7.7.3.1. Excel XLS

To work with an Excel XLS (Excel 95 to Excel 2003) output format with options, please follow the steps below.

1. Select the Excel XLS output format for this query.

| Click and DECiDE Query | × |
|---|-----|
| General Format Icon | |
| Csv (Unicode) Csv (Unicode) Excel XLS Excel XLSX Excel XLSX Big Data Geogle Data Table Template File/Sheet Name | • |
| Brows | e |
| Write Mode or Cell[Mode]: | |
| OK Cancel Apply He | elp |

- 2. Click **Browse** to locate the **ModelExcel.xls** file in the C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal directory by default.
- 3. Select the demo Sheet Name.
- 4. Change the cell to A8.
- 5. Keep the **Replace** action.

| | Destination Information | | × |
|--------------------------|-----------------------------------|------------------|---|
| File Name: %CND_BAI_S | AMPLES%\Web Portal\ModelExcel.xls | OK Cancel |] |
| Sheet Name: Cell: | demo A8 | | |
| Action: | Replace 💌 | | |

6. Click **OK**. The presentation you defined will appear

Note: the syntax for the Excel and Sheet name is the following:

[C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\ModelExcel.xls]demo

or



[PathName\FileName.xls]SheetName

And the destination cell and write mode are written as follows.

A8[REPLACE]

or

Cell[WriteMode]

| Click and DECiDE Query | | | | | |
|--|------|--|--|--|--|
| General Format Icon | | | | | |
| Csv (Unicode) | | | | | |
| Excel XLS | | | | | |
| Excel XLSX Big Data | | | | | |
| Template File/Sheet Name | | | | | |
| [%CND_BAI_SAMPLES%\Web Portal\ModelExcel.xls]demo Browse | - 11 | | | | |
| Write Mode or Cell[Mode]: A8[REPLACE] | | | | | |
| OK Cancel Apply Help | | | | | |

- 7. Click OK.
- 8. Select **File> Save** to save the menu to apply the changes.

Note: when the end user runs this query later and selects Excel as the output format, the data will be sent using a copy of the Excel template loaded in memory and using the specified Sheet Name, Cell and write mode.

7.7.3.2. Excel XLSX

The same can be performed with **Excel XLSX** (Excel 2007, Excel 2010 or greater). Repeat the steps described for Excel in the section directly above. Select the ModelExcel.xlsx file instead of the ModelExcel.xls.

| Click and DECiDE Query | x |
|---|---|
| General Format Icon | |
| Csv (Unicode) Excel XLS Excel XLSX Excel XLSX Big Data Google Data Table | |
| Template File/Sheet Name [%CND_BAI_SAMPLES%\Web Portal\ModelExcel.xlsx]demo Write Mode or Cell[Mode]: A8[REPLACE] | |
| OK Cancel Apply Help | |

Contact us: E-mail: <u>support@clickndecide.com</u> Tel: +33 (0)4 67 84 48 00 Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France. To contact your nearest Click&DECiDE partner, <u>click here</u>.



Note: the syntax for the Excel XLSX and Sheet name is as follows.

[C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal \ModelExcel.xlsx]demo

or

[PathName\FileName.xlsx]SheetName

Note: when the end user runs this query later, selecting Excel XLSX as the output format, the data will be sent using a copy of the Excel XLSX template loaded in memory and using the specified Sheet Name, Cell and write mode.

7.7.3.3. Excel XLSX Big Data

This output format is similar to the **Excel XLSX** (Excel 2007, Excel 2010 or greater) but will allow a fast transfer performance. This option only accepts ERASESHEET or ERASEFILE write modes and sends data without layout neither format that you can change later under Excel This format is recommended for very big volume of Data.

7.7.4. Excel Pivot Table and OWC Cube

These output formats are specific for a Cube item and will apply to a Cube Tab. The Cube must have been done with a Click&DECiDE Builder version 13 (32-bit).

This new feature; since version 10.1, allows you to send data and presentation from a dynamic cube in the Web Portal to Excel XLSX (Excel 2007 or greater using *.XLSX).

Since version 2013, the Cubes Data Tabs can also be exported to **Excel Pivot Table** (without the Chart Tabs).

Since version 2015, a Cube can be run in HTML (Tabular views and Chart Views) using the **OWC Cube** output format.

That is why, now, all available formats appear in the Menu Builder for a Cube:

| Click and DECiDE Cube | × |
|------------------------|---|
| General Format Icon | |
| Cube Excel Pivot Table | 8 |

Once the menu is saved and the menu list refreshed through the Web Portal, select this output format to send the cube tab into an Excel XLSX file having the XLSM extension, as in the following example:

| Browse My Menu Cubes Sales by year | and by Salesman | ★ [Didier] Logout |
|--|--------------------------|-------------------|
| Area? | IGNORE | |
| Salesman Name: | IGNORE | |
| Date? (Use key words or a calendar date) | IGNORE | |
| Output Format: O OWC Cube Excel Pivot Table | | |
| ▶ Share | | |
| | | |
| Run | Export to File Save Task | |



Contact us: E-mail: <u>support@clickndecide.com</u> Tel: +33 (0)4 67 84 48 00 Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France. To contact your nearest Click&DECiDE partner, <u>click here</u>.



Do you want to open or save Sales by Year and by Salesman.xism (32.6 KB) from localhost?

Open the file under Excel 2007, 2010 or greater.

| | C5 | ▼ (° fs | 586901.8 | | | | | ~ |
|------|---------------|-----------------|-----------------|-----------------|-----------------|---|----------------------------------|------------|
| | А | В | С | D | E | | PivotTable Field List | × × |
| 1 | AREA | All AREA 🔽 | | | | | | |
| 2 | | | | | | | Choose fields to add to report: | i - |
| 3 | TOTAL | Years 💌 | | | | | Σ Values | ^ |
| 4 | SALNAME 💌 | ■ 2014 | ■ 2015 | ■ 2016 | Grand Total | | TOTAL | |
| 5 | Bill Raley | \$1,946,734.41 | \$586,901.80 | \$980,617.40 | \$3,514,253.61 | | | _ |
| 6 | Diane Meyer | \$809,028.71 | \$866,456.48 | \$1,117,395.96 | \$2,792,881.15 | | | |
| 7 | Doug Castro | \$539,347.00 | \$2,057,604.94 | \$3,702,036.66 | \$6,298,988.60 | | | - 11 |
| 8 | Georges Dunel | \$986,082.85 | \$1,058,487.55 | \$974,480.00 | \$3,019,050.40 | | | |
| 9 | James Smith | \$2,515,405.81 | \$877,679.15 | \$260,713.50 | \$3,653,798.46 | | DATE by Month | |
| 10 | Jean Martin | \$380,835.70 | \$221,698.60 | \$325,283.80 | \$927,818.10 | = | | |
| 11 | Jim Baxter | \$317,132.10 | \$336,686.40 | \$317,937.79 | \$971,756.29 | | B SALINAME | |
| 12 | Joe Kramer | \$302,905.50 | \$1,145,743.10 | \$2,468,565.04 | \$3,917,213.64 | | | · · |
| 13 | John Brown | \$60,028.75 | \$70,754.50 | \$666,119.23 | \$796,902.48 | | Drag fields between areas below: | |
| 14 | Karen Walker | \$349,603.38 | \$376,172.84 | \$65,860.00 | \$791,636.21 | | Report Filter Column Labels | |
| 15 | Kim Johnson | \$114,746.00 | \$132,729.50 | \$455,860.15 | \$703,335.65 | | AREA | - |
| 16 | Ric Smith | \$809,453.25 | \$2,670,371.44 | \$3,460,295.59 | \$6,940,120.28 | | | |
| 17 | Robert Salta | \$1,082,461.50 | \$330,074.50 | \$1,601,381.54 | \$3,013,917.54 | | | |
| 18 | Sandra Davis | \$421,544.69 | \$454,850.26 | \$1,582,517.28 | \$2,458,912.23 | | Row Labels E Values | |
| 19 | Tim Rosenberg | \$73,173.00 | \$78,634.00 | \$240,590.29 | \$392,397.29 | | SALNAME TOTAL | |
| 20 | Wanda Sanders | \$463,290.50 | \$501,604.30 | \$557,420.15 | \$1,522,314.95 | | | |
| 21 | Grand Total | \$11,171,773.15 | \$11,766,449.35 | \$18,777,074.36 | \$41,715,296.86 | - | Defer Layout Update | Jodate |
| 14 - | Sheet1 | セフ / | Ī | 4 | • • | 1 | | -prosect |
| Rea | dy | | | | | | □□□ 100% | + .:: |

Using **OWC Cube** output format, you will get the result as follow:

| â BAI | Demonstration | n Dynamic (| Cubes Cub | e 1 Sales by Y | ear and by Sal | esman Re | a [Adminis | trator] <u>Déconne</u> |
|------------------|-------------------------|-----------------|----------------|----------------|----------------|----------------|-----------------|------------------------|
| Cube 1 Sales by | / Year and by Sale | esman | | | | | | |
| Cube Chart | | | | | | | | |
| | | | | | | | | |
| | |] 💐 🌾 📕 🖷 | i 🗇 🌆 🖣 🏹 🛛 | | | | | |
| Sales by Year ar | nd by Salesman | 1 | | | | | | |
| AREA 🔻 | | | | | | | | |
| | | | | | | | | |
| | Years 🕶 Quarte | | | | | | | - |
| | ⊞ 2013 | ⊞ 2014 | 🗆 2015 | | | | | Grand Total |
| | | | | | | | Total | |
| | | | | | | | | |
| SALNAME 🔹 👻 | TOTAL | | TOTAL | | | TOTAL | | |
| Bill Raley | \$980 617,40 | \$1 946 734,41 | \$94 029,60 | \$285 789,00 | \$83 468,20 | \$123 615,00 | \$586 901,80 | \$3 514 253,61 |
| Diane Meyer 👘 | \$1 117 395,96 | \$809 028,71 | \$288 528,68 | \$231 969,40 | \$278 246,40 | \$67 712,00 | \$866 456,48 | \$2 792 881,15 |
| Doug Castro | \$3 702 036,66 | \$539 347,00 | \$63 270,00 | \$413 728,69 | \$525 278,50 | \$1 055 327,75 | \$2 057 604,94 | \$6 298 988,60 |
| Georges Dunel | \$974 480,00 | \$986 082,85 | \$369 413,60 | \$178 550,50 | \$343 310,70 | \$167 212,75 | \$1 058 487,55 | \$3 019 050,40 |
| James Smith | \$260 713,50 | \$2 515 405,81 | \$206 072,80 | \$271 419,80 | \$400 186,55 | | \$877 679,15 | \$3 653 798,46 |
| Jean Martin 👘 | \$325 283,80 | \$380 835,70 | | | \$87 316,60 | \$134 382,00 | \$221 698,60 | \$927 818,10 |
| Jim Baxter 👘 | \$317 937,79 | \$317 132,10 | \$158 318,20 | | \$178 368,20 | | \$336 686,40 | \$971 756,29 |
| Joe Kramer 👘 | \$2 468 565,04 | \$302 905,50 | \$151 172,80 | | \$578 429,80 | \$416 140,50 | \$1 145 743,10 | \$3 917 213,64 |
| John Brown | \$666 119,23 | \$60 028,75 | | | \$70 754,50 | | \$70 754,50 | \$796 902,48 |
| Karen Walker 👘 | \$65 860,00 | \$349 603,38 | \$158 306,99 | | \$217 865,85 | | \$376 172,84 | \$791 636,21 |
| Kim Johnson 👘 | \$455 860,15 | \$114 746,00 | \$42 375,00 | | | \$90 354,50 | \$132 729,50 | \$703 335,65 |
| Ric Smith | \$3 460 295,59 | \$809 453,25 | \$1 389 965,69 | | \$616 749,31 | \$663 656,44 | \$2 670 371,44 | \$6 940 120,28 |
| Robert Salta 👘 | \$1 601 381,54 | \$1 082 461,50 | \$274 794,50 | \$55 280,00 | | | \$330 074,50 | \$3 013 917,54 |
| Sandra Davis 👘 | \$1 582 517,28 | \$421 544,69 | | | \$149 480,01 | \$305 370,25 | \$454 850,26 | \$2 458 912,23 |
| Tim Rosenberg | \$240 590,29 | \$73 173,00 | | | | \$78 634,00 | \$78 634,00 | \$392 397,29 |
| Wanda Sanders | \$557 420,15 | \$463 290,50 | | \$226 123,30 | \$275 481,00 | | \$501 604,30 | \$1 522 314,95 |
| Grand Total | \$18 777 074 <u>,36</u> | \$11 171 773,15 | \$3 196 247,85 | \$1 662 860,69 | \$3 804 935,63 | \$3 102 405,19 | \$11 766 449,35 | \$41 715 296,86 |

Contact us: E-mail: <u>support@clickndecide.com</u> Tel: +33 (0)4 67 84 48 00 Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France. To contact your nearest Click&DECiDE partner, <u>click here</u>.



8. Other commands

8.1. Backup Database Security

Use the command File> Backup Database Security to save your entire Administration Manager configuration.

A default name such as 2010.03.17_122424.cndbck will be proposed (YYYY.MM.DD_hhmmss.cndbck)

Note that the previous extension was .bck can still be used, but since version 10.1 the extension will be .cndbck.

| Click and [| DECiDE Administration Manager | × |
|-------------|--|---|
| I | You have made a backup of Click and DECiDE Server To restore all settings just double-click on backup file. Warning: the Click and DECiDE Model and Click and DECiDE Web Menu files are not included in that backup file. Note also that the restore path must be the same as the backup path. | ı |
| | ОК | |

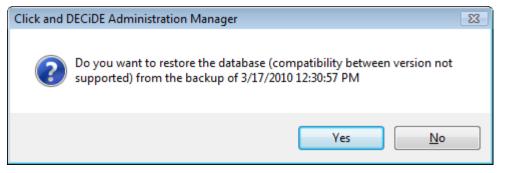
This backup file will contain all the data sources defined, all the Users and User Groups defined, all the Menu Names defined in this software and all the relation between each Tab

New since Click&DECiDE version 2012: this backup also contains now the Scheduled Tasks and the Output Formats defined in the Server machine and made with Click&DECiDE Builder.

Warning: this backup will not include the Menu files (with extension *.wmu) neither the Model files (with extension *.mod or *.mox).

8.2. Restore a Backup for Administration Manager

Close Click&DECiDE Administration Manager. Search for your backup file (with extension *.bck or *.cndbck) and double-click on this file. You will get this window. Click **Yes** to continue.



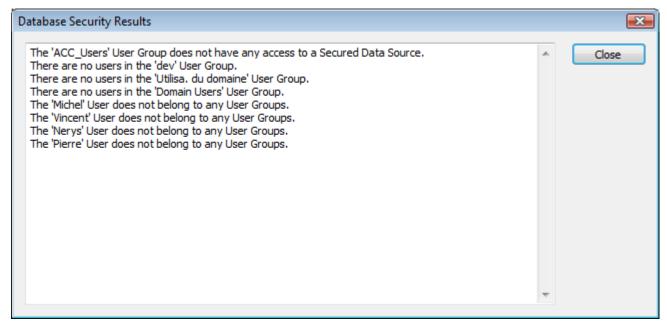
That will restore the backup file and open Click&DECiDE Administration Manager.

Click now the command **File> Update Database Security** or the corresponding icon is to be sure to generate again the working internal files.

8.3. Check Database Security

Click the command **File> Check Database Security** to get a windows displaying information about missing items such as User Group without users, Users Groups without Data Source Access, User not belonging to any User Group etc.





8.4. Export Report

Click the command File> Export Report to get a report in RTF format about:

Data Source summary: all the data source name, their type, the Running Mode, the security, the maximum of simultaneous users, the Locked status, the direct access, the default password, etc.

User Group summary: Name, Description, Task Administrator (Supervisor), Enable status.

Users summary: Name, ID, Password (stars only will appear if exist), Address, Zip Code, City, Phone, Enable status.

User and Password summary: Data Source, ID, Password (Encrypted if exist).

User and User Group summary: list of all Users with ID and Name for each User Group.

User Group and Data Source Access summary: User Group, Data South, Path (if defined).

Problems summary: the same information given by the command File> Check Database Security

8.5. Import Windows Users and Groups

Click the command **File> Import Windows Users and Groups** to import directly in Click&DECiDE Administration Manager one or several Windows User Groups and Users.

You will get this window with all machines in the Domain. Select a machine to display the sub-levels Local Group and Global Groups:





| Windows User and Group Import Utility |
|--|
| Select Users and/or Groups, then click Import: |
| Select Users and/or Groups, then click Import: |
| |
| |
| |

Select the required level, then double click the name to display the sub-level content:

| Windows User and Group Import Utility | | | | |
|--|-----|--|--|--|
| Select Users and/or Groups, then click Import: | | | | |
| | | | | |
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Select the required sub-level to display the sub-level users:





| Windows User and Group Import Utility | | |
|---|---|--|
| Select Users and/or Groups, then click Import: | | |
| Image: Second | ^ | |
| Backup Operators Distributed COM Users Guests Guest | | |
| IUSR_NR2008 Wetwork Configuration Operators Wetwork Configuration Users | | |
| Performance Monitor Users Viewer Users Power Users Print Operators | | |
| Remote Desktop Users Replicator | - | |
| Details: | | |
| | * | |
| | - | |
| Import Close | | |

And click Import to retrieve the information inside Click&DECiDE Administration Manager.

The Details box can display some warning such as:

| Details: | | |
|--|-------|--|
| The 'Administrator' User was not imported because of: The changes you requested to the table were not successful because they would create du | | |
| The 'Guest' User was not imported because of: The changes you requested to the table were not successful because they would create o | ۱ | |
| Import Close | | |

The 'Administrator' User was not imported because of:

The changes you requested to the table were not successful because they would create duplicate values in the index, primary key, or relationship. Change the data in the field or fields that contain duplicate data, remove the index, or redefine the index to permit duplicate entries and try again.

When this step is finished, click **Close**.





Apply then to any required User Group the data sources they can access to, the menu they will be able to see through the Web Portal, etc.

Always finish using the command File> Update Database Security or the corresponding icon of to be sure to generate again the working internal files.

8.6. Expand or Reduce all Levels with one click

When being in the User Groups Tab or in the Users Tab, you can expand all levels using one click on the "plus" icon:

| Users - | ; | User | | |
|--|-----|--|---------|------------|
| Admin User Groups Model Parameter AdminDB Model Parameter Model Parameter Model Parameter Model Parameter Model Parameter Model Parameter Click this icon to expand all user levels Model Parameter Model Parameter M | M H | User ID: Name: Password: Confirmation: Enable: CAL: | • | |
| 🗄 😓 Data Sources Access | - | Data Source | User ID | D Password |
| Model Parameter | | | | |

When being in the User Groups Tab or in the Users Tab, you can reduce all levels using one click on the "minus" icon:

| Users 2 | • User |
|---|--|
| Admin AdminDB Adminstrator Analyser Baxter Jim | User ID: Admin Name: Password: ••••• |
| Davis Sandra Click this icon to reduce | Confirmation: ••••• |
| Didier Didier Dupont William | Enable: |
| 🚊 📲 🛃 Forti | CAL: |
| 🖶 🐁 François | |
| 🖶 📲 Guest | Data Source User ID Password |
| in the second s | |

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