

ActuateOne™

One Design
One Server
One User Experience

Using Actuate BIRT Designer Professional

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About Using Actuate BIRT Designer Professional

Using Actuate BIRT Designer Professional describes how to use Actuate BIRT Designer to create reports, and the Actuate BIRT option to configure and distribute BIRT reports.

Using Actuate BIRT Designer Professional describes the additional functionality available in Actuate BIRT Designer that is not available in the open-source BIRT Report Designer. Actuate provides this functionality as extra Eclipse features that integrate into the Eclipse BIRT report designer environment. For information about the functionality shared with the open-source BIRT Report Designer, see *BIRT: A Field Guide* and *Integrating and Extending BIRT*, both published by Addison-Wesley.

Using Actuate BIRT Designer Professional includes the following chapters:

- *About Using Actuate BIRT Designer Professional*. This chapter provides an overview of this guide.
- *Part 1. Retrieving data for reports*. This part explains how to connect to various data sources and retrieve data for use in reports.
- *Chapter 1. Accessing data*. This chapter lists all the types of data sources that Actuate BIRT Designer supports, and provides an overview of how reports access data.
- *Chapter 2. Accessing data in a JDBC database*. This chapter describes how to connect to and retrieve data from a database using the SQL query builder.
- *Chapter 3. Creating data objects*. This chapter describes how to create data objects to provide data for dashboards and reports.
- *Chapter 4. Accessing data in a data object*. This chapter describes how to connect to and retrieve data from a data object.
- *Chapter 5. Accessing data in an information object*. This chapter describes how to connect to and retrieve data from an information object.
- *Chapter 6. Accessing data in a report document*. This chapter describes how to connect to and retrieve data from a report document.

- *Chapter 7. Accessing data in an e.report.* This chapter describes how to connect to and retrieve data from a report developed with Actuate e.Report Designer Professional.
- *Chapter 8. Accessing data in Amazon DynamoDB.* This chapter describes how to connect to and retrieve data from a database store in Amazon DynamoDB.
- *Chapter 9. Accessing data in Amazon Relational Database Service.* This chapter describes how to connect to and retrieve data from a database instance in Amazon RDS.
- *Chapter 10. Accessing data in a Hadoop system.* This chapter describes how to connect to and retrieve data from a Hadoop system.
- *Chapter 11. Accessing data in Salesforce.com.* This chapter describes how to connect to and retrieve data from Salesforce.com.
- *Chapter 12. Accessing data in a POJO.* This chapter describes how to connect to and retrieve data from a POJO.
- *Chapter 13. Combining data from multiple data sources.* This chapter describes how to combine data from different data sets.
- *Part 2. Designing reports.* This part describes the additional design functionality available in Actuate BIRT Designer.
- *Chapter 14. Formatting a report.* This chapter describes the additional report formatting options in Actuate BIRT Designer.
- *Chapter 15. Building HTML5 charts.* This chapter describes the requirements and methods for adding and formatting HTML5 charts in a report.
- *Chapter 16. Using Flash objects in a report.* This chapter describes the requirements and methods for adding Flash objects in a report.
- *Chapter 17. Using built-in Flash charts and gadgets.* This chapter describes how to create and format Flash charts and gadgets using the Flash chart and Flash gadget builders.
- *Chapter 18. Using the Flash object library.* This chapter describes how to add Flash objects from the InfoSoft Flash object library to a report.
- *Chapter 19. Writing expressions using EasyScript.* This chapter describes how to write expressions using EasyScript, which is an expression syntax similar to the syntax used in Excel formulas. The chapter also provides a reference to the EasyScript functions and operators.
- *Chapter 20. Specifying filter conditions at report run time.* This chapter describes how to create dynamic filters and report parameters, which provide users more control over what data they see in a report.
- *Chapter 21. Displaying cross tab data by relative time periods.* This chapter describes how to aggregate cross tab data by relative time periods, such as year-to-date, current quarter, or trailing 30 days.

- *Chapter 22. Adding HTML buttons to a report.* This chapter describes how to use HTML buttons to run JavaScript code.
- *Chapter 23. Controlling user access to report pages and data.* This chapter describes how to use the page-level security and data security features in Actuate iServer to control user access to particular sections in a report and a particular set of data in a data object.
- *Chapter 24. Accessing iServer environment information.* This chapter describes how to write event handlers in a report to retrieve iServer environment information.
- *Chapter 25. Performing impact analysis.* This chapter describes how to assess the impact of changes in a database and in BIRT objects.
- *Part 3. Deploying reports and resources.* This part explains how to deploy reports and resources to an Actuate iServer encyclopedia.
- *Chapter 26. Deploying BIRT reports to iServer.* This chapter describes how to use the Actuate BIRT Report option to run and distribute BIRT reports in Actuate iServer.
- *Chapter 27. Configuring data source connections in iServer.* This chapter describes how to set up and use a data source configuration file using Actuate iServer.
- *Chapter 28. Configuring fonts in iServer.* This chapter describes how to set up and use custom fonts in Actuate BIRT reports using Actuate iServer.
- *Chapter 29. Working with BIRT encryption in iServer.* This chapter describes how to set up and use report encryption using Actuate iServer.
- *Chapter 30. Using custom emitters in iServer.* This chapter describes how to provide custom output formats for Actuate BIRT reports on Actuate iServer.
- *Part 4. Using Actuate BIRT APIs.* This part explains how to use classes in the `com.actuate.birt.*` public packages.
- *Chapter 31. Using the BIRT data object API.* This chapter describes how to work with BIRT data objects and report designs programmatically.

Part One

Retrieving data for reports

1

Accessing data

This chapter contains the following topics:

- Supported data sources
- How a report accesses data

Supported data sources

Actuate BIRT Designer supports all the types of data sources that open-source BIRT Report Designer supports, and more. Table 1-1 lists the types of data sources that each product supports.

Table 1-1 Supported data source types

Data source type	Actuate BIRT Designer	BIRT Report Designer
Actuate data object	✓	
Actuate information object	✓	
Actuate JDBC Salesforce.com	✓	
ActuateOne for e.Reports	✓	
Amazon DynamoDB	✓	
Amazon RDS	✓	
BIRT report document	✓	
Flat file	✓	✓
Hive	✓	✓
JDBC	✓	✓
JDBC connection for Query Builder	✓	
Plain Old Java Object (POJO)	✓	
Scripted	✓	✓
Static	✓	
Web service	✓	✓
XML document	✓	✓

Actuate data objects, Actuate information objects, and BIRT report documents are data files that report developers or data architects create with Actuate BIRT Designer. These files contain the information to connect to and retrieve data from enterprise data sources, such as databases and web applications.

The Actuate JDBC Salesforce.com data source enables a connection to a Salesforce.com database through JDBC.

ActuateOne for e.Reports is a data driver that supports the retrieval of data from reports developed using Actuate e.Report Designer Professional.

The Amazon DynamoDB data source enables a connection to Amazon's NoSQL (non-relational) database in the cloud.

The Amazon RDS (Relational Database Service) data source enables a connection to Amazon's web service, which provides access to a relational database in the cloud.

The Hive data source enables a connection to Hadoop through Hive, an open-source data warehouse infrastructure for facilitating data summarization, queries, and analysis.

Like the JDBC data source, the JDBC connection for Query Builder data source supports the retrieval of data from JDBC databases. However, instead of typing a SQL query to select the data to retrieve, you use a graphical query builder to construct the SQL query.

A static data source is a set of data that you create in Actuate BIRT Designer. This type of data is useful when you need to create sample data quickly for testing purposes.

How a report accesses data

A report uses the same mechanism to access data from any of the sources listed in Table 1-1. First, you create a data source, which is a BIRT object that contains the information to connect to an underlying data source. Each type of data source requires different connection information. For a JDBC data source, for example, you specify the driver, URL, and user login to connect to a database. An XML data source requires the location of the XML file and, optionally, the location of the XML schema.

Next, you create a data set, which is a BIRT object that specifies and returns all the data that is available to a report. For a JDBC data source, for example, you write a SQL query or run a stored procedure to retrieve specific data from a database. For an XML data source, you use XPath expressions to specify the XML elements and attributes from which to retrieve data.

This book provides instructions for accessing data from data sources that only Actuate BIRT Designer supports. For information about accessing data from data sources that both BIRT products support, see *BIRT: A Field Guide*.

2

Accessing data in a JDBC database

This chapter contains the following topics:

- Using database data in a report
- Accessing data using the SQL query builder

Using database data in a report

Like the open-source BIRT Report Designer, Actuate BIRT Designer supports connecting to many relational databases, such as Oracle, Sybase, Informix, DB2, SQL Server, and Derby, through database-specific JDBC drivers. Actuate BIRT Designer provides these JDBC drivers, whereas, users of the open-source designer must download and install the appropriate JDBC drivers.

Both designers provide a query editor for typing the SQL statement to specify the data to retrieve. In addition, Actuate BIRT Designer includes a SQL query builder that you can use to create SQL statements graphically. The query builder provides two advantages over the query editor:

- The ability to create and edit SQL statements quickly without typing SQL code. This feature is particularly useful when creating multiple joins, using SQL functions, or writing complex expressions.
- The ability for BIRT to modify a SQL query when you sort, group, or filter data using the graphical tools. BIRT maps these user-interface actions to the equivalent SQL expressions, and because the database processes the data, the report's performance improves.

This chapter describes how to access database data using the query builder. For information about using the query editor, see *BIRT: A Field Guide*.

Accessing data using the SQL query builder

As with other types of data sources, for a report to retrieve data from a database using the query builder, you must create the following BIRT objects:

- A data source that contains the information to connect to the database
- A data set that specifies the data to retrieve from the database

Connecting to a database

The connection properties vary depending on the specific database, but the following information is typically required:

- The database type
- The JDBC driver to use
- The database name and URL
- Login credentials

How to connect to a database

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select JDBC Database Connection for Query Builder from the list of data source types, as shown in Figure 2-1.
 - 2 In Data Source Name, type a name for the data source.

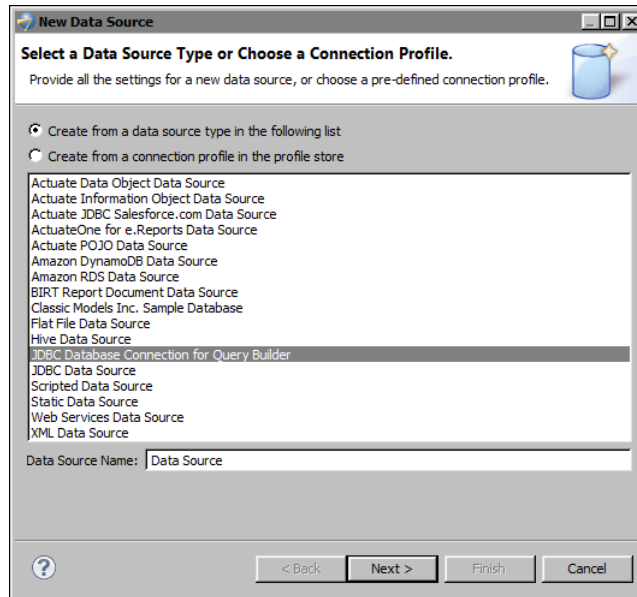


Figure 2-1 Selecting JDBC Database Connection for Query Builder

- 3 Choose Next.
- 3 In New JDBC Database Connection for Query Builder, select the database to which to connect. To connect to the Classic Models sample database, select Derby. Choose Next.
- 4 In New Connection Profile, select a driver, and provide the information to connect to the database. Figure 2-2 shows an example of the properties to connect to the sample database. These properties are supplied by default when you select Derby as the connection profile type. To connect to a different Derby database, select a different driver and specify the appropriate connection information.

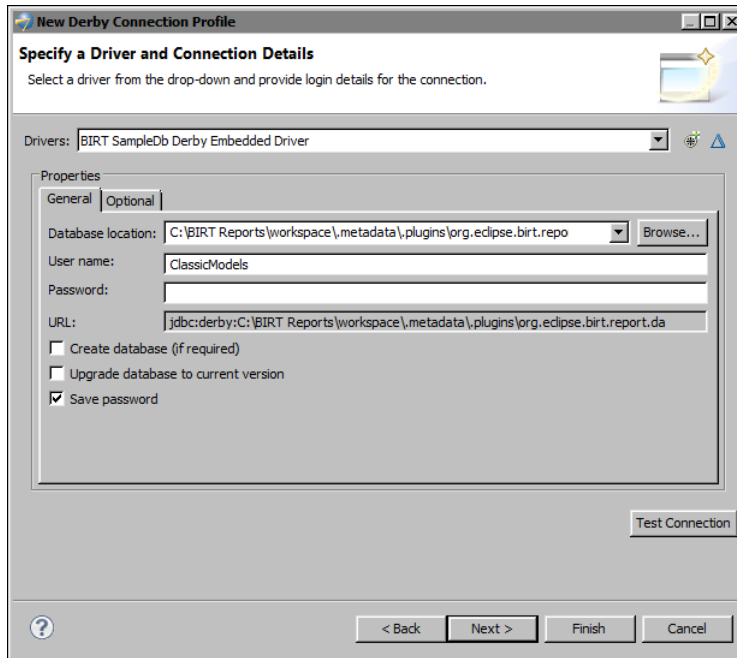


Figure 2-2 Connection properties for the sample database

Choose Test Connection to check the connection to the database. Choose Finish.

Specifying the data to retrieve

When you create a JDBC Database Connection for Query Builder data source, as described in the previous section, you have access to the SQL query builder. This graphical tool provides access to your database schema and objects, and wizards that help you select and join tables, sort, group, and filter data.

How to create a query using the query builder

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the JDBC Database Connection for Query Builder data source to use. Data Set Type displays SQL Select Query [Query Builder].
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.

The query builder appears, as shown in Figure 2-3. The top pane displays a `SELECT` statement. You can type a query here, or use the tools in the middle and bottom panes to create the query. The rest of this procedure describes the steps for creating a query graphically.

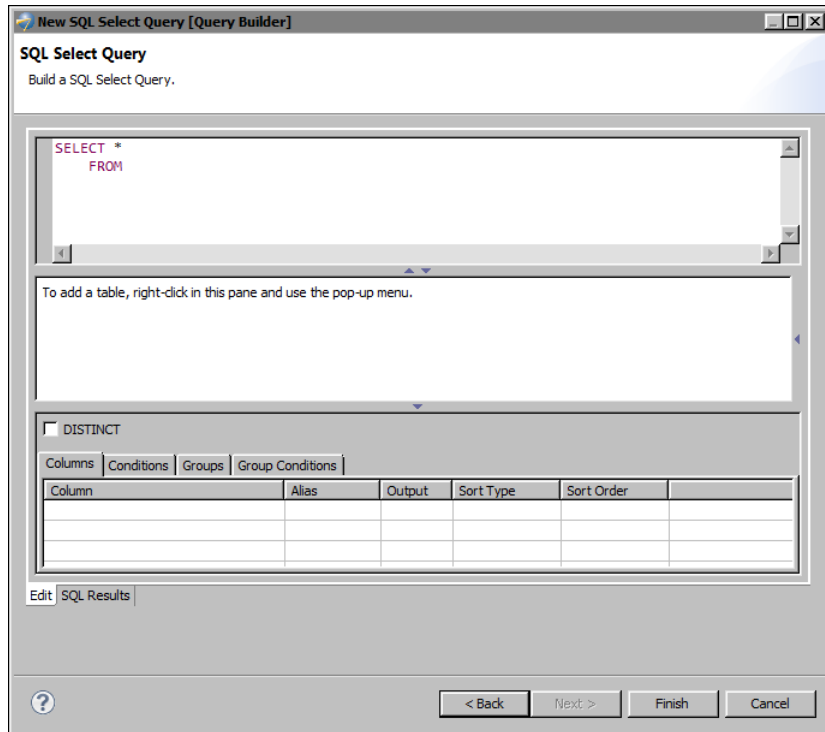


Figure 2-3 Query Builder

- 3 Select the tables and columns that contain the data to use in the report.
 - 1 Right-click in the middle pane, and choose Add Table.
 - 2 Expand a database schema, and select the desired table. The table and its columns appear in the middle pane.
 - 3 Select the desired columns.
 - 4 Repeat the previous steps to select columns in other tables.
- 4 Join the tables.
 - 1 Right-click in a table, then choose Create Join.
 - 2 In Create Join, specify the tables and columns to join, and the join type. Figure 2-4 shows an example of an inner join on the CUSTOMERNUMBER columns in the CUSTOMERS and ORDERS tables.

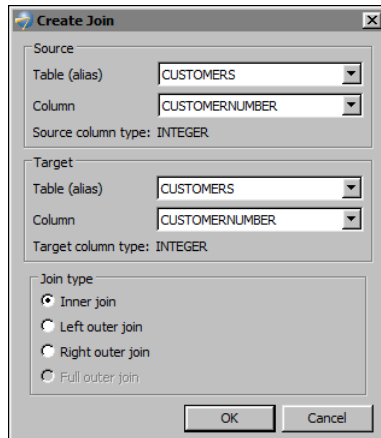


Figure 2-4 An inner join between two tables

- 3 Repeat the previous steps to join all the tables. Figure 2-5 shows three tables that are joined. The SELECT statement in the top pane is updated to reflect the selected columns and table joins. The bottom pane lists the selected columns and their properties.

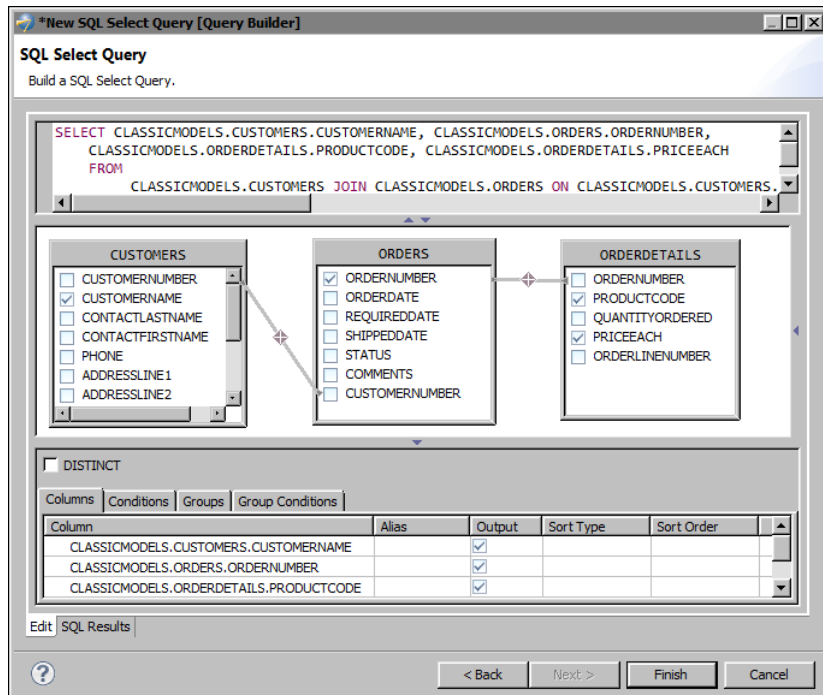


Figure 2-5 Query Builder showing three joined tables

- 5 If necessary, use the tabs in the bottom pane to do the following:
 - Choose Columns to edit column properties, create computed columns or complex expressions.
 - Choose Conditions to filter data rows.
 - Choose Groups to group aggregate data.
 - Choose Group Conditions to filter groups.

The following sections provide more information about each task.

Creating computed columns and complex expressions

Using SQL, you can manipulate data to return it in the format that you require. You can create computed columns that return values derived from multiple fields, for example:

```
QuantityOrdered * PriceEach  
ContactFirstName || ' ' || ContactLastName
```

You can aggregate data using SQL functions, for example:

```
SUM(OrderAmount)  
AVG(OrderTotal)
```

You can create statements that provide if-then-else logic, for example:

```
CASE WHEN QuantityInStock > 0 THEN 'In Stock' ELSE 'Out of Stock'  
END
```

How to create a computed column

- 1 Choose Columns.
- 2 In Column, click in an empty cell. Click the arrow button, scroll down the list of available columns, and choose Build Expression.
- 3 Click outside the cell to open the expression builder.
- 4 In Expression Builder, select the type of expression to build and choose Next. Expression Builder displays different properties depending on the expression type.

Figure 2-6 shows an example of a function expression. The expression uses an aggregate function, SUM, to calculate order totals. The expression, SUM(QUANTITYORDERED * PRICEEACH), is created by selecting the SUM function, and the required columns and operator to use in the calculation.

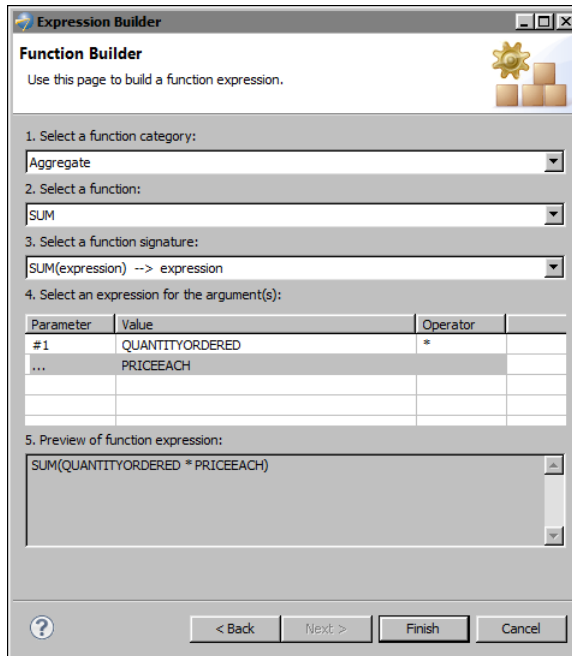


Figure 2-6 Example of a function expression

Choose Finish. The computed column appears under Columns.

- 5 In Alias, type an alias for the computed column so that it is easily identified.

Filtering data rows

Databases typically contain vast amounts of data. Reports, however, typically use a small subset of the data, so SQL queries often contain filter conditions to limit the rows returned.

How to filter data rows

- 1 Choose Conditions.
- 2 Create a filter condition.
 - 1 In Column, select a column or Build Expression to create an expression.
 - 2 In Operator, select an operator.
 - 3 In Value, select a column or type a value.
 - 4 In AND/OR, optionally select AND or OR to specify another filter condition.

Figure 2-7 shows an example of a filter condition.

Columns	Conditions	Groups	Group Conditions	
Column	Operator	Value	AND/OR	
CLASSICMODELS.ORDERS.ORDERDATE	>	'2004-06-30'		

Figure 2-7 Filter condition on data rows

The following WHERE clause is added to the SELECT statement in the top pane:

```
WHERE CLASSICMODELS.ORDERS.ORDERDATE > '2004-06-30'
```

Grouping data

If you use aggregate functions, such SUM or AVG, you typically have to group the results by one or more columns. For example, an Orders table contains order records and some customers have multiple orders. To get the order totals for each customer, you would use the GROUP BY clause to group the customers, and the SUM function to aggregate the order totals by customer.

How to group data

- 1 Choose Groups.
- 2 Under Column, click in an empty row. Click the arrow button, and select the column whose aggregate data to group. Figure 2-8 shows an example in which results are grouped on the CUSTOMERNAME column.

Columns	Conditions	Groups	Group Conditions
Grouping root			

Type:

Column
CLASSICMODELS.CUSTOMERS.CUSTOMERNAME

Figure 2-8 Grouping on the CUSTOMERNAME column

The following GROUP BY clause is added to the SELECT statement:

```
GROUP BY CLASSICMODELS.CUSTOMERS.CUSTOMERNAME
```

Filtering groups

You can specify filter conditions for data that is grouped. For example, if order records are grouped by customer, you can select only customers whose order totals exceed \$150000. The filter condition for a group is specified using the HAVING clause. This clause behaves like the WHERE clause, but is applicable to groups. The WHERE clause, on the other hand, applies to individual rows.

A SELECT statement can contain both WHERE and HAVING clauses. For example, you can select customers whose order totals exceed \$150000, factoring

only orders placed after 06/30/2004. The SELECT statement would look like the following:

```
SELECT CustomerName, SUM(OrderAmount) FROM Orders
WHERE OrderDate > '2004-06-30'
GROUP BY CustomerName
HAVING SUM(OrderAmount) > 150000
```

How to filter groups

- 1 Choose Group Conditions.
- 2 Create a filter condition.
 - 1 In Column, select a column or Build Expression to create an expression.
 - 2 In Operator, select an operator.
 - 3 In Value, select a column or type a constant value.
 - 4 In AND/OR, optionally select AND or OR to specify another filter condition.

Figure 2-9 shows an example of a filter condition specified for groups.

Columns	Conditions	Groups	Group Conditions	
Column	Operator	Value	AND/OR	
SUM(CLASSICMODELS.ORDERDETAILS.QUANTITYORDERED * CLASSICMODELS.ORDERDETAILS.PRICEEACH)	>=	150000		

Figure 2-9 A filter condition specified for groups

The following HAVING clause is added to the SELECT statement:

```
HAVING SUM (CLASSICMODELS.ORDERDETAILS.QUANTITYORDERED *
CLASSICMODELS.ORDERDETAILS.PRICEEACH) >= 150000
```

Creating data objects

This chapter contains the following topics:

- About data objects
- Design considerations
- Building a data object
- Providing cached data
- Publishing a data object
- Enabling incremental updates
- Managing user access
- Maintaining a data object

About data objects

A data object is a BIRT object that contains all the information necessary to connect to an external data source, retrieve data from that data source, and structure the data in a way that supports business analysis. Data objects are similar to data marts, which are simplified repositories of data gathered from corporate data sources and designed to address specific business queries.

Data architects or report developers create data objects to provide data for the following items:

- Dashboards, which users create using Actuate BIRT 360 Studio, a dashboard application on Actuate BIRT iServer
- BIRT reports that are created using either Actuate BIRT Designer or Actuate BIRT Studio on iServer

Data objects use Actuate's in-memory analytics technology, which loads data in memory to speed up the processing of data.

Design considerations

A data object is a collection of the following BIRT objects:

- Data sources
- Data sets
- Data cubes
- Report parameters

A data object can include any number of data sources, data sets, data cubes, and report parameters. Although it is possible to create a single data object that contains all the data that dashboard users or report developers could possibly need, a data object that provides too much data can be confusing for users. In addition, the amount of memory that a data object uses increases with the number of data rows returned by data sets and the number of aggregations calculated by cubes.

If creating data objects for diverse groups of users or reports, evaluate how best to organize data into data objects and how much data to include in each data object.

The objects to include in a data object depend on which item—dashboard or BIRT report—is using the data object. Table 3-1 lists the objects that you typically include when creating a data object for a dashboard and for a report.

Table 3-1 Typical objects in a data object for a dashboard and a report

	Data source	Data set	Cube	Report parameter
Dashboard	✓	✓	✓	✓
BIRT report	✓	✓	✓	

The following sections describe in more detail the guidelines for designing data objects for dashboards and reports.

Designing data objects for dashboards

Actuate BIRT 360 is a web application designed for business users who want to measure the effectiveness of their business processes and have this decision-support information displayed graphically in a dashboard. The data objects you create for dashboards need to extract the right data and provide it in a structure suitable for dashboard gadgets.

Use the following guidelines when designing data objects for dashboard users:

- Identify the users and create a data object or series of data objects for each user group.
A typical approach is to create data objects by groups of users, where each data object fulfills a different business need. For example, executives, sales managers, and customer support managers represent three distinct user groups with different data requirements. Executives might be interested in viewing revenue by month or quarter. Sales managers might need to evaluate the sales numbers of individual sales representatives by month or quarter. Customer support managers might need to monitor support call volume by days. Depending on how iServer user accounts are set up, you might be able to leverage the defined user roles and groups to identify the user groups by which to organize data objects. Contact the iServer administrator for this information.
- Provide users with sufficient data that they can use to analyze by different dimensions and at different levels of detail.
Users often need to view data from different dimensions. For example, sales managers might need to view sales by product line, by region, or by sales representative, and by different time periods. If viewing sales data by region, sales managers might need to drill down to view sales by cities within each region.
- Design data sets and cubes to provide data that is suitable for the gadgets that will be used to display data.
The dashboard provides a suite of gadgets for displaying data. Each gadget accesses data in the same way as the corresponding element does in a BIRT report.
 - All chart gadgets use data from either a data set or a cube.

- The cross tab gadget uses data from a cube.
- The table and summary table gadgets use data from a data set. In addition, summary tables require that each column in the data set be assigned the appropriate analysis type to provide the expected functionality. For more information, see “Configuring data set columns for summary tables,” later in this chapter.
- Design data sets or report parameters to provide lists of values to display in data selector gadgets. Just as a report parameter supports run-time filtering of data in a report, a data selector gadget enables a dashboard user to filter data in a chart, cross tab, table, or any other gadget that displays data.

Figure 3-1 shows a dashboard that uses five gadgets to display sales data. Descriptions of each gadget follow the illustration.

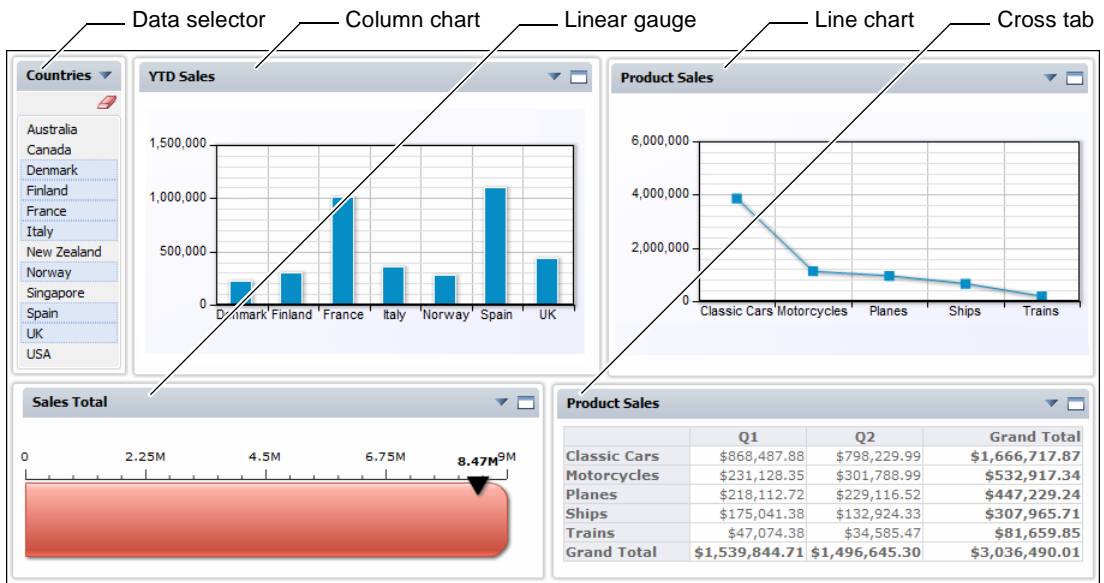


Figure 3-1 Sample dashboard displaying five gadgets

- The data selector gadget displays a list of countries. The data selector is linked to the column chart next to it. Dashboard users select values from the data selector to filter the data to display in the column chart. The data selector gets its values from a data set, a cube, or a report parameter.
- The column chart gadget is linked to the data selector, as described previously. The column chart derives its data from a data set or a cube.
- The line chart gadget derives its data from a data set or a cube.
- The linear gauge gadget derives its data from a data set or a cube.
- The cross tab gadget derives its data from a cube.

Designing data objects for reports created with Actuate BIRT Studio

Actuate BIRT Studio is a web-based report design tool on iServer designed for users who want to create reports quickly and easily without deep understanding of database architecture or report design techniques. BIRT Studio users create reports using predefined data sources and templates that provide the data and basic layout for their reports.

The data objects you create should provide the data in a structure that is appropriate for business users and for the report elements that users can add to a report. The design guidelines discussed in the previous section apply here as well, except for the following:

- In BIRT Studio, a chart uses data from a table in a report. The chart does not use data directly from a data set or a cube.
- Report parameters in a data object do not link to parameters created in BIRT Studio, so you typically do not include report parameters in a data object that you create for BIRT Studio users.

Designing data objects for reports created with Actuate BIRT Designer

A data object can be used as a data source for BIRT reports. As an alternative to defining data sources and data sets for each report, you can create a data object that multiple reports share. This principle is similar to reports sharing data sources and data sets stored in a library. One design option is to create data objects by types of reports. For example, if creating a set of sales reports and a set of customer reports, create one data object to provide data for the first set of reports and another for the second set of reports.

Report parameters in a data object cannot be reused in a report. A report parameter in a data object acts as a filter. You are prompted to specify a parameter value when you create a data source based on the data object, and the data source returns only the rows that meet the filter criteria.

Building a data object

Building a data object entails creating a data object file, then adding data sources, data sets, and cubes to the data object. To add these data items, you can:

- Create new data items within the data object.
- Export data items in reports or libraries to the data object.

How to create a data object

- 1 In the Report Design perspective, choose File→New→Data Object.
- 2 In New Data Object, do the following:
 - 1 Select the folder in which to store the data object.
 - 2 Edit the default file name to specify a new name. The extension must be .datadesign and the file name must not contain the following characters:
[] * / \ : & ?
Use a descriptive name that enables users to determine the contents of the data object. A descriptive name is particularly important if users have access to multiple data objects.
 - 3 Choose Finish. The report editor displays a blank data object design.
- 3 Start adding data sources, data sets, and cubes to the data object.

Creating new items for a data object

The procedures for creating data sources, data sets, cubes, and report parameters for a data object are the same as the procedures for creating these items for a report. Use Data Explorer to create, edit, and delete data items in a data object. Figure 3-2 shows a data object that contains one data source, two data sets, and two cubes.

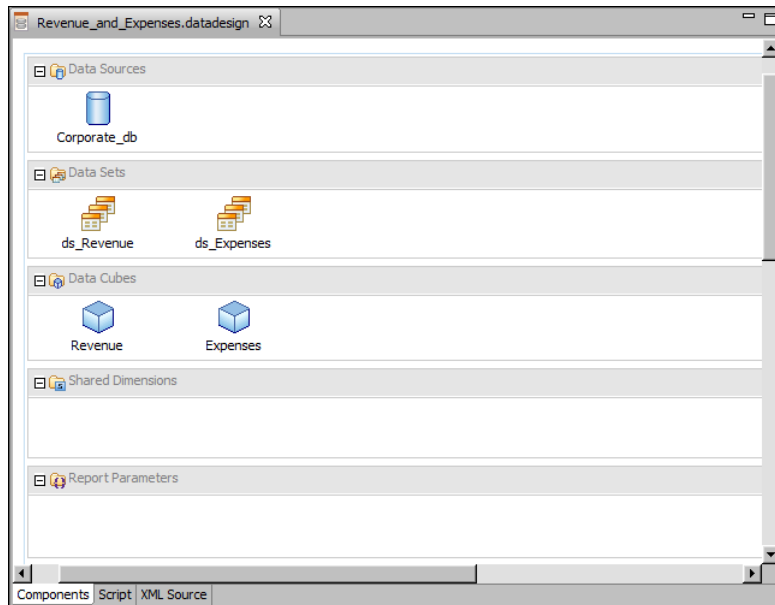


Figure 3-2 Contents of a data object

In this data object example, the Corporate_db data source connects to a corporate database. The ds_Revenue and ds_Expenses data sets retrieve data from the database. The Revenue and Expenses cubes use data from the ds_Revenue and ds_Expenses data sets, respectively. For information about creating data sources, data sets, and cubes, see *BIRT: A Field Guide*.

Exporting items to a data object

An organization that creates and uses BIRT reports has data sources, data sets, and cubes on hand. As a data object designer, you can reuse these items by exporting them from a report or a library to a data object.

The export utility copies the items to the data object. The exported items do not reference the original items in the report or the library. The export utility also detects and copies dependent items. For example, if you export a cube, the utility also exports the data source and data set that the cube uses.

Be careful when exporting multiple data sources, data sets, or cubes from different sources. If the data object contains an item with the same name, BIRT warns of the name conflict and asks whether or not to overwrite the item in the data object. Overwrite the item only if you want to replace it. The overwrite action cannot be undone. If you select a data set or a cube to export, and BIRT displays the name-conflict message, the duplicate names apply not only to the selected data set or cube, but to any dependent item. For a cube, for example, the data set or data source used by the cube might have the same name as a data set or data source in the target data object.

How to export data items to a data object

- 1 Open the report or library that contains the data items to export to a data object.
- 2 In Data Explorer, right-click a data item, then choose Export to Data Object, as shown in Figure 3-3.

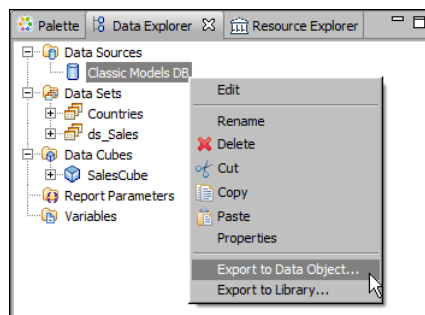


Figure 3-3 Exporting a data source to a data object

Export Elements to Data Object—Select Data Object displays the data objects (.datadesign files) in the resource folder, if any exists, as shown in Figure 3-4. By default, BIRT uses the current project folder as the resource folder.

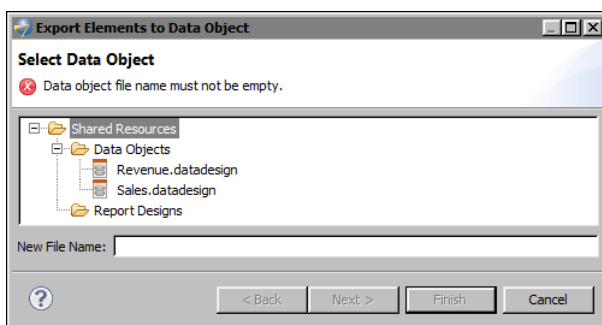


Figure 3-4 Export Elements displaying the data objects in the resource folder

- 3 Perform one of the following steps:
 - Select an existing data object to which to export data items.
 - Create a new data object by specifying a file name in New File Name. BIRT saves the data object in the resource folder.
- 4 Choose Next.
- 5 In Export Elements to Data Object—Select Elements, shown in Figure 3-5, select one or multiple data items to export. If you select a data set, BIRT also exports the data source that the data set uses. Similarly, if you select a cube, the associated data set and data source are exported.

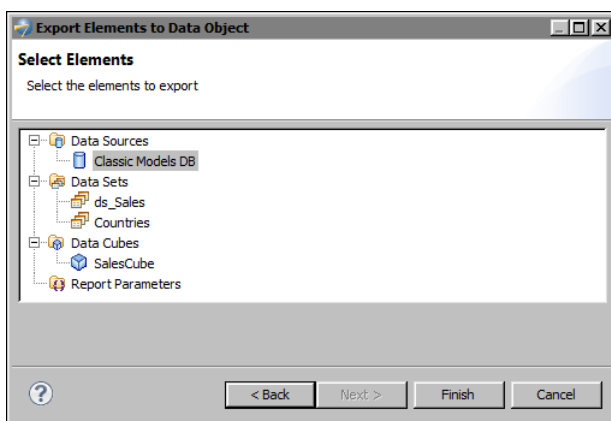


Figure 3-5 Export Elements displaying the data items that you can export

- 6 Choose Finish.

If BIRT does not detect any name conflicts between the items selected for export and the items in an existing data object, BIRT exports the items and asks if you want to open the data object.

- 7 Open the data object to review its contents. The exported data items appear in the data object.

Creating a shared dimension for cubes

If designing multiple cubes that contain the same dimension, create a shared dimension. For example, if one cube contains sales data by country, state, and city, and another cube contains budget data by country, state, and city, you can create a shared multi-level dimension that provides country, state, and city data. By using a shared dimension, you define and maintain dimension data in one place, and reuse the dimension in multiple cubes. Reusing a dimension also speeds up data processing.

There are two ways to create a shared dimension. You can:

- Create a new shared dimension.
- Convert an existing cube dimension into a shared dimension.

How to create a shared dimension

This procedure assumes that you have already created a data object, as well as, the data set that provides the data for the dimension.

- 1 Open the data object.
- 2 In Data Explorer, right-click Shared Dimensions, then choose New Shared Dimension.
- 3 In Dimension Builder, specify the following information:
 - In Dataset, select the data set that contains the columns to use in the dimension.
 - In Available Columns, drag a column and drop it in the following location:
(Drop a field here to create a group)
 - In Add Group, type a name for the group.
 - If creating a multi-level dimension, drag and drop additional columns. Figure 3-6 shows an example of a multi-level dimension that contains country, state, and city data.

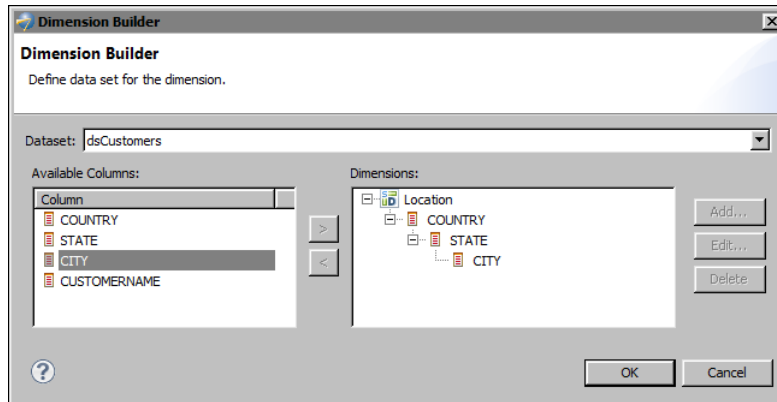


Figure 3-6 Dimension Builder displaying a defined shared dimension

Choose OK. The shared dimension appears under Shared Dimensions in Data Explorer and in the data object design.

How to convert a cube dimension into a shared dimension

This procedure assumes that you have already included cubes in a data object.

- 1 Open the data object.
- 2 In Data Explorer, expand the cube that contains the dimension to convert to a shared dimension, then right-click the dimension and choose Convert to Shared Dimension, as shown in Figure 3-7.

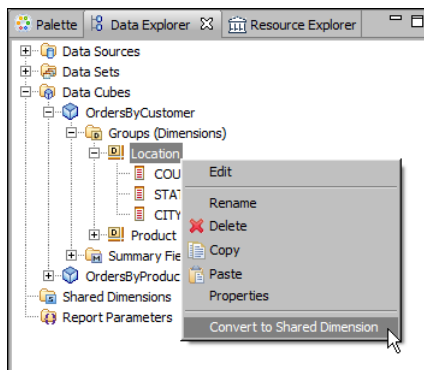


Figure 3-7 Converting a dimension to a shared dimension

The converted dimension appears under Shared Dimensions in Data Explorer and in the data object design, as shown in Figure 3-8. BIRT also replaces the original cube dimension with the shared dimension.

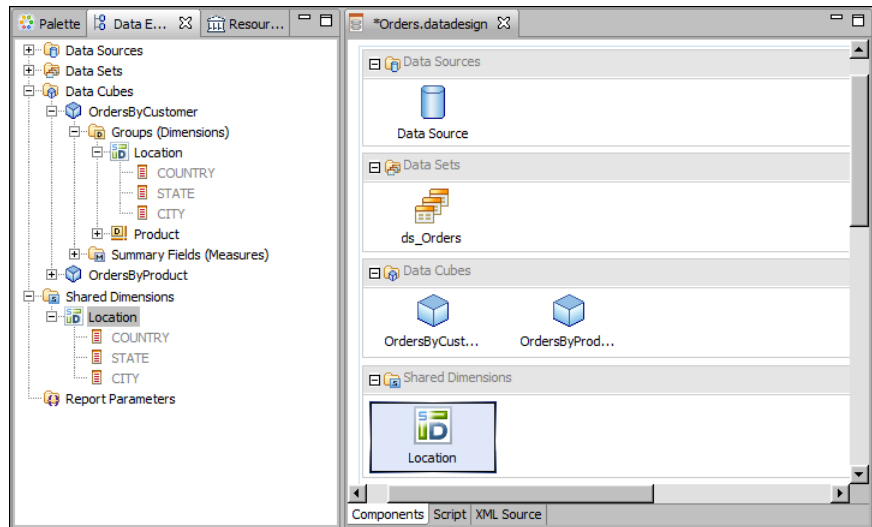


Figure 3-8 Data Explorer and data object showing the shared dimension

Configuring data set columns for summary tables

Summary tables are commonly used in dashboards and BIRT Studio reports to display key summary information. Figure 3-9 shows an example of a summary table created in BIRT Studio. Order data is grouped by date, in quarterly intervals, and by product line. The price of each order is summed to display subtotals for each quarter and product line, as well as, a grand total.

Quarter	Products	Sales
Q1, 2003		
	Classic Cars	\$152,582
	Trucks and Buses	\$43,594
	Vintage Cars	\$106,982
Sub Total (Q1, 2003)		\$303,157
Q2, 2003		
	Classic Cars	\$194,291
	Trucks and Buses	\$62,805
	Vintage Cars	\$86,264
Sub Total (Q2, 2003)		\$343,360
Q3, 2003		
	Classic Cars	\$268,968
	Trucks and Buses	\$73,842
	Vintage Cars	\$111,893
Sub Total (Q3, 2003)		\$454,704
Q4, 2003		
	Classic Cars	\$758,991
	Trucks and Buses	\$196,416
	Vintage Cars	\$314,023
Sub Total (Q4, 2003)		\$1,269,430
Grand Total		\$2,370,651

Figure 3-9 Summary table

To create a summary table quickly, users select a table's auto-summarize feature, then select the data set columns whose data to group and aggregate. When the auto-summarize feature is enabled, the software performs the grouping and aggregating. To support this feature, you must configure each data set column to provide the software with the appropriate information to perform these tasks. For example, it makes sense to group sales data by order date or product line, but not by revenue. Conversely, it makes sense to aggregate revenue values, but not order date or product line values.

To provide the appropriate information to generate a summary table, set the Analysis Type property of each data set column to one of the following values:

- **Dimension**

Use this analysis type to support the grouping of data in the column. For example, to display revenue by product line, set the product line column as a dimension.

- **Attribute**

An attribute describes the items associated with a dimension. For a product dimension, for example, attributes might include color, size, and price. When you set a column as an attribute, you must also specify the dimension column of which it is an attribute. The summary table cannot group data in an attribute column.

- **Measure**

Use this analysis type to support the aggregating of values in the column. For example, to calculate revenue totals, set the revenue column as a measure.

If you do not set a column's analysis type, Actuate BIRT Designer assigns a value using the following criteria:

- If the column contains numeric values, the analysis type is measure.
- If the column contains string, date, or Boolean values, the analysis type is dimension.
- If the column is a primary key, a foreign key, or an indexed column in a database, the analysis type is dimension even if the column contains numeric values.

Sometimes, the default analysis type values do not provide sensible data for a summary table. To create a well-designed data object, it is necessary to review the analysis type for every column in the data set. The following are examples of problems with the default values:

- Not all numeric columns are suitable as measures. Sometimes, it makes sense to group on numeric values, such as order numbers or customer numbers. In these cases, you would change the column's analysis type to dimension. Sometimes, it does not make sense to aggregate numeric data, such as MSRP

(Manufacturer's Suggested Retail Price), which might be more appropriate as an attribute of a product dimension.

- Not all string columns are suitable as dimensions. For example, if each value in a column, such as product code, is unique, it does not make sense to group on this column. Such a column is better defined as an attribute of a product dimension.

How to set the analysis type of a data set column

This procedure assumes that you have already created a data object and added a data set to it.

- 1 Open the data object.
- 2 In Data Explorer, double-click the data set to edit it.
- 3 In Edit Data Set, choose Output Columns, then double-click the column whose analysis type to set. Edit Output Column displays the properties of the selected column, as shown in Figure 3-10.

The screenshot shows the 'Edit Output Column' dialog box. The 'Name' field is set to 'PRODUCTLINE'. The 'Type' is set to 'String'. The 'Analysis Type' is set to 'Dimension'. The 'Display Name' is also 'PRODUCTLINE'. The 'Format as' is 'Unformatted'. The 'Alignment' is 'Left'. The 'Heading' is 'PRODUCTLINE'. The 'Access Control List Expression' is empty. The 'Link To' is 'None'. There are two checkboxes at the bottom: 'Index this column in generated datadesign for faster lookup.' and 'Remove duplicated values in the generated data file.' Both are unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

Figure 3-10 Properties of a data set column

- 4 In Analysis Type, select Dimension, Attribute, or Measure. If you select Attribute, in the list box that displays <Select Field Name...>, select a column of which this column is an attribute. The column you select must be a dimension column.

Creating hyperlinks to provide drill-down capability

Hyperlinks are commonly used in reports to enable users to find related information or drill down to more detailed data. For example, a summary report that displays sales totals by region can use hyperlinks to link each region to another report that displays detailed sales data. To provide this functionality in a dashboard or in a report, create hyperlinks in the following items in a data object:

- Data set columns
- Dimensions and measures in a cube

You can create the following types of hyperlinks:

- Drill-through, to link to a bookmarked location in a report
- URI, to link to a document or a web page

Figure 3-11 shows an example of a drill-through hyperlink definition that specifies a link to a bookmark, row["COUNTRY"], in a target report named SalesByCountryAndProduct.rptdesign.

The screenshot shows the 'Hyperlink Options' dialog box with the following settings:

- Select Hyperlink Type:** ☒ No Link, ☐ URI, ☒ Drill-through
- Step 1: Select a target report**
 - ☒ Report Design: /SalesByCountryAndProduct.rptdesign
 - ☐ Report Document:
 - Report Parameters:**

Parameters	Required	Data Type	Values

Add... Edit... Remove Remove All
- Step 2: Select a target anchor**
 - ☒ Target Bookmark
 - ☐ Table of Contents Entry in Target Report
 - row["COUNTRY"]
- Step 3: Create a link expression that matches the target bookmark**
 - Link Expression: row["COUNTRY"]
- Step 4: Show target report in**
 - ☒ New Window ☐ Parent Frame
 - ☐ Same Frame ☐ Whole Page
- Step 5: Select a format for target report**
 - ☐ Format the target report in:
- Step 6: Tool Tip**
 - Tool Tip: Click to link to detailed sales information

Buttons: ? OK Cancel

Figure 3-11 Definition of a drill-through hyperlink to link to a report

Figure 3-12 shows an example of a URI hyperlink definition that specifies a link to a document.

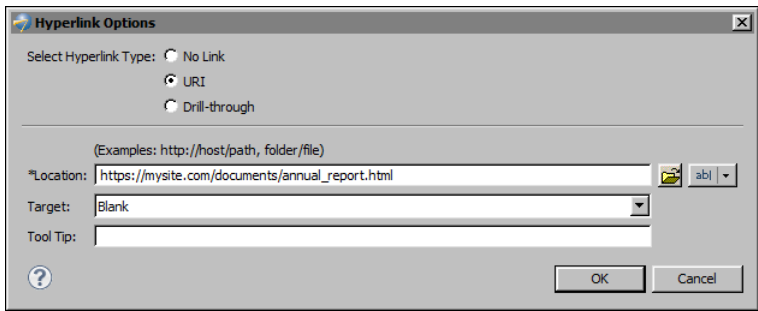


Figure 3-12 Definition of a hyperlink that uses a URI to link to a document

How to create a hyperlink from a data set column

This procedure assumes that you have already created a data object and added a data set to it.

- 1 Open the data object.
- 2 In Data Explorer, double-click the data set to edit it.
- 3 In Edit Data Set, choose Output Columns, then double-click the column to which to add a hyperlink. Edit Output Column displays the properties of the selected column, as shown in Figure 3-13.

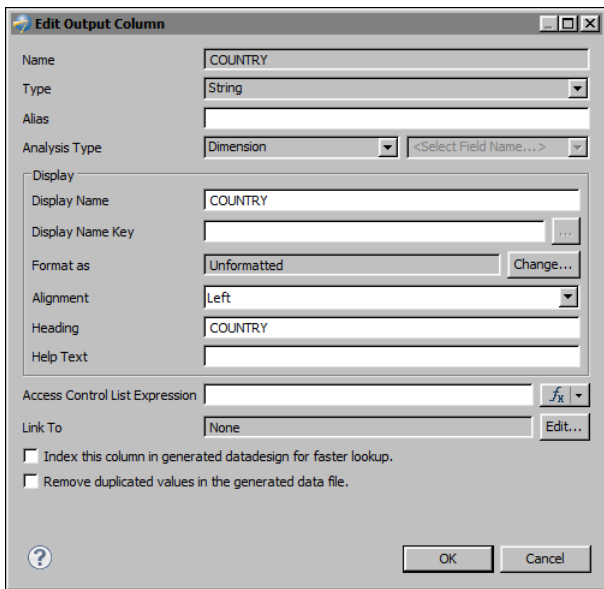


Figure 3-13 Edit Output Columns displaying the properties of a column

- 4 Choose Edit next to the Link To property.
- 5 In Hyperlink Options, select the type of hyperlink to create, then set the properties of the hyperlink. These steps are the same as the steps for defining a hyperlink in a report, and are described in *BIRT: A Field Guide*.

How to create a hyperlink from a dimension or measure in a cube

This procedure assumes that you have already created a data object and added a cube to it.

- 1 Open the data object.
- 2 In Data Explorer, double-click the cube to edit it.
- 3 In the cube builder, choose Groups and Summaries.
- 4 Under Groups and Summaries, double-click the dimension or measure to which to add a hyperlink.

The properties of the selected dimension or measure appear. Figure 3-14 shows the properties of a measure.

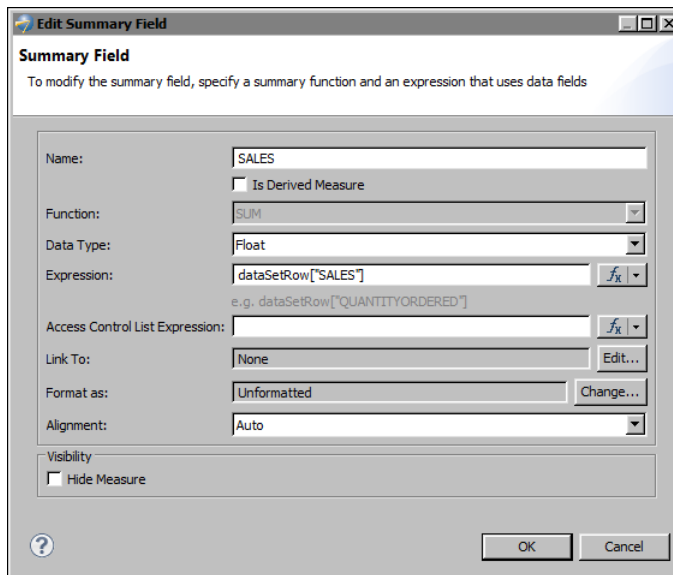


Figure 3-14 Edit Summary Field displaying the properties of a measure

- 5 Choose Edit next to the Link To property.
- 6 In Hyperlink Options, select the type of hyperlink to create, then set the properties of the hyperlink. These steps are the same as the steps for defining a hyperlink in a report, and are described in *BIRT: A Field Guide*.

Hiding data sets from users

When you publish a data object in iServer, dashboard and BIRT Studio users who are granted access to the data object can select any of the data sets and cubes in the data object as a source of data for their dashboard gadget or report. However, not all data sets return data that is suitable for a dashboard or a report.

Some data sets are created to provide data specifically for a cube or a report parameter, and the data usually is not useful for a dashboard or report. For example, a data set created for a report parameter that displays a list of countries would return only values from a country column. For some cubes, multiple data sets are linked to provide data for the cube, and the individual data sets do not provide sufficient data for a dashboard or report.

To present to users only data sets and cubes that are designed to provide data for dashboards and reports, you should hide data sets that only provide limited data for a report parameter or a cube.

How to hide data sets from users

- 1 In the data object design, right-click the data set to hide, and choose Edit.
- 2 In the data set editor, choose Settings.
- 3 In Visibility, deselect Include this data set in the generated data object store, as shown in Figure 3-15.

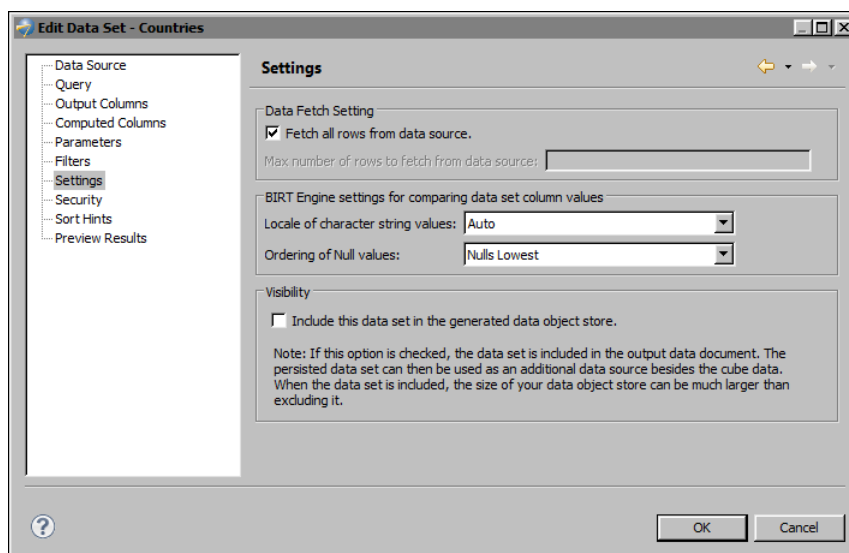


Figure 3-15 Data set editor displaying the Settings page

Providing cached data

When a dashboard or a report uses a data object, each time the dashboard is refreshed or the report is run, the data object connects to the underlying data source and retrieves data from it. This operation is typically resource-intensive. For a more efficient data access alternative, cache the data in a data object store, and provide dashboard and report users with access to the data object store.

How to create a data object store

- 1 In Navigator, right-click the data object design (.datadesign) file, then choose Generate Data Objects.
- 2 In Generate Data Objects, type a file name for the data object store. The file name must have a .data extension. Choose OK.

BIRT creates a data object store (.data file) that contains the materialized data. The file is saved in the same folder in which the data object design file resides.

Publishing a data object

To make data objects available to report developers using Actuate BIRT Designer, place the data objects in a shared resource folder, just as you do with other shared resources, such as libraries and style sheets.

To make data objects available to dashboard and BIRT Studio users, you must publish the data objects in an iServer Encyclopedia volume. From the iServer perspective, a data object is a resource, similar to Java classes, image files, or libraries, which are resources for reports published in iServer.

You can publish data object design (.datadesign) files or data object stores (.data). A common strategy is to publish the design files, then schedule those files to be run regularly to generate the data object stores. To manage system resources effectively, iServer volume administrators can make the data object stores generally available to users while limiting access to the data object design files.

How to publish a data object in an iServer volume

- 1 Create an iServer profile, which specifies the information to connect to an iServer volume.
- 2 Place the data object in the BIRT resource folder. The location of the resource folder is specified in the Preferences page, which you access by choosing Windows➤Preference from the main menu, then choosing Report Design—Resource. The default location is the current project folder.
- 3 Choose File➤Publish to iServer. Select Publish Resources, then select the data object to publish.

For more information about creating an iServer profile, assigning a resource folder in iServer, and publishing items to an iServer volume, see “Deploying BIRT reports to iServer,” later in this book. For information about managing files in iServer, see *Managing an Encyclopedia Volume*.

Enabling incremental updates

Data object stores (.data) containing cached data are typically updated regularly to provide the latest data to dashboards and reports. In some cases, you can speed up the generation process by using the incremental updates option. Instead of retrieving the full set of data rows each time the data object store is generated, the incremental updates option retrieves only additional data rows that meet specified criteria.

Use this option to add new data rows on a regular basis to a large set of legacy data. For example, a data object retrieves order information. When the data object is generated initially, it contains all the order information to date. Each week, a new data object store is generated to capture new order data. For cases like this, adding only the new data each week improves performance significantly.

Observe the following guidelines when designing a data object that uses the incremental update option:

- For each update, you must specify which data rows to add to an existing data object store. To accomplish this task, create a parameter in the data object. In the example described previously, the data object would use a date-time parameter to specify which week of data to retrieve.
- Data rows can only be added to the result set returned by a data set, provided that the data set definition does not change between updates. If you change the definition of a data set, for example, by adding or deleting a column, you must generate a new data object store without using the incremental updates option.
- If the data object contains a cube and you want the cube to include the new data set rows, or if you change the cube definition, you must also generate a new data object store without the incremental updates option.

How to enable incremental updates

This procedure assumes that you have already created the data object design (.datadesign).

- 1 In the layout editor, right-click in an empty area of the data object design.
- 2 Choose Enable Incremental Update.

After you publish this data object to iServer, incremental updates occur each time the data object is generated. Depending on the job properties that you specify, iServer replaces the existing .data file with the updated version or maintains

multiple versions of the .data file. Dashboards and BIRT Studio reports configured to use the latest .data file display the new data when users refresh the dashboard or report.

If you share the data object in a file system with other report developers using Actuate BIRT Designer, you replace the .data file manually.

How to apply incremental updates to a .data file stored in the file system

This procedure assumes that you have already created the data object design (.datadesign) and generated the initial data object store (.data).

- 1 In the layout editor, right-click in an empty area of the data object design, then choose **Enable Incremental Update**.
- 2 In Navigator, right-click the data object design, then choose **Generate Data Objects**.
- 3 In **Incremental Update**, do the following:
 - 1 Select **Use incremental update**.
 - 2 Select the .data file to update.
 - 3 In **Target data file name**, type a temporary .data file to which to write the new data. This step is required because a file saved in the file system cannot be read and written to at the same time.

Figure 3-16 shows an example of values specified in **Incremental Update**. In this example, **Employees.data** is the file to update, and **Employees_Temp.data** is the temporary file to which to write the new data.

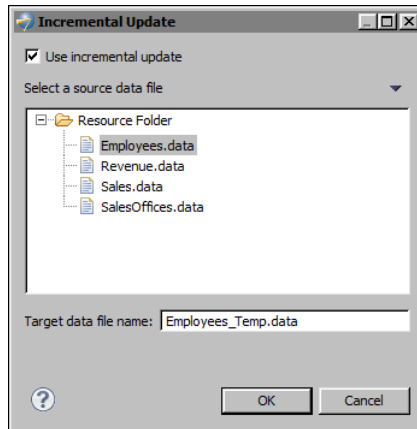


Figure 3-16 Incremental Update

- 4 Choose **OK**.
- 4 In **Input Parameters**, provide the parameter values to specify which data to add to the .data file. Figure 3-17 shows an example of a parameter that

displays a list of values from which you select a year or years whose data to add.

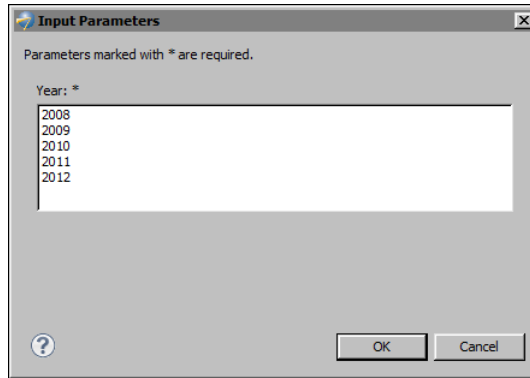


Figure 3-17 Input Parameters

- 5 In Navigator, delete the original .data file. In the example shown in Figure 3-16, you would delete Employees.data.
- 6 Rename the temporary .data file to the name of the original .data file. In the example shown in Figure 3-16, you would rename Employees_Temp.data as Employee.data.

Managing user access

When you publish a data object to an iServer Encyclopedia volume, you grant specific users or user groups access to the data object. This type of security is implemented in iServer, and users either have access to all the items in the data object, or none at all. For information about implementing security in iServer, see *Managing an Encyclopedia Volume*.

Using Actuate BIRT Designer in conjunction with iServer, you can apply more granular security rules to control user access to individual items in a data object, down to which data set columns, cube dimensions and measures, and data rows are available to particular groups of users. For information about implementing this type of security, see Chapter 23, “Controlling user access to report pages and data,” later in this book.

Maintaining a data object

Changes you make to any item in a data object propagate to the reports and dashboard gadgets that use that item. For example, if you add a dimension to a cube in a data object, all reports and gadgets that use that cube have access to the

new dimension. This automatic-update functionality is useful for applying necessary updates, such as connection properties in a data source, to all reports and gadgets.

However, the automatic-update functionality also means that you have to be careful with the type of change that you make. The following changes can cause errors in reports and gadgets:

- Renaming a data object, data source, data set, or cube
- Deleting a data object, data source, data set, or cube
- Deleting items within a data set or a cube, such as a column, dimension, or measure

To fix errors resulting from a renamed or deleted data object item, the user has to recreate the report element or dashboard gadget to use a different data object item.

Before changing a data object, run an impact analysis report to determine how many files, and which files, are affected. For information about this process, see Chapter 25, “Performing impact analysis.”

4

Accessing data in a data object

This chapter contains the following topics:

- Using data object data in a report
- Connecting to a data object
- Specifying the data to retrieve from a data object
- Using a cube in a data object

Using data object data in a report

A data object provides a report access to predesigned data sources, data sets, and cubes. Report developers create data objects to streamline the report creation process. Data objects provide the following benefits:

- Simplified data access and retrieval. The predesigned data sources, data sets, and cubes in a data object enable report developers to select the data to use in a report without knowledge of the underlying data source, how to connect to it, and how to extract data from it.
- Reusability across multiple reports. If a suite of reports require the same data, designing the data sources, data sets, and cubes once in a shared data object eliminates the need to design the same elements repeatedly for each report.
- Dynamic updates to data items. Changes to data items in a data object propagate to reports that use the data object, ensuring that reports have the latest updates, such as connection properties.

A report accesses data from a data object through either a data object design (.datadesign) file or a data object store (.data). The data design file retrieves data, on demand, each time the report is run. A data object store contains cached, or materialized, data, and provides much more efficient access to data. If getting real-time data is more important than report generation speed, use the data object design file. If data in the underlying data source does not change constantly, or if a data object store is generated regularly, use the data object store.

As with other types of data sources, for a report to use data from a data object, you must create the following BIRT objects:

- A data source that contains the information to connect to a data object
- A data set that specifies the data to use from the data object

Connecting to a data object

When creating a data source to connect to a data object, the only information required is the name of the data object.

How to connect to a data object

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select Actuate Data Object Data Source from the list of data source types, as shown in Figure 4-1.
 - 2 In Data Source Name, type a name for the data source.

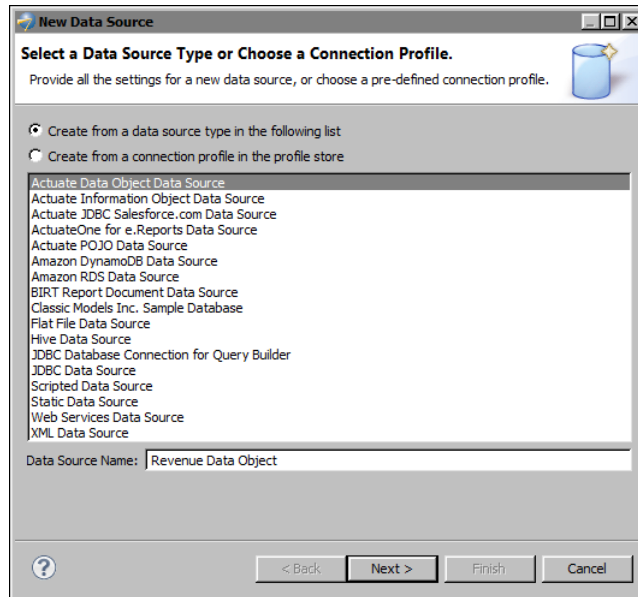


Figure 4-1 Selecting BIRT data object as a data source type

3 Choose Next.

- 3 In New Actuate Data Object Data Source, next to Data Object, choose Browse. Select Data Object File displays all the data objects (.datadesign and .data files) in the resource folder. Select the data object to use in the report, then choose OK.

Figure 4-2 shows an example of a data object data source that connects to a data object named Revenue.data.

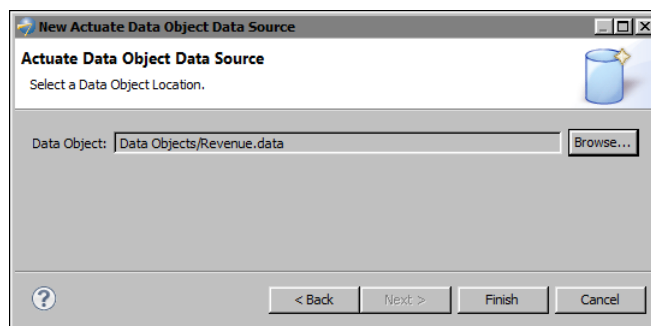


Figure 4-2 Data object selected

- 4 Choose Next. This button is enabled if the data object contains report parameters. Provide the parameter values.

5 Choose Finish.

The data source appears under Data Sources in Data Explorer. The report now has access to all the data sets and cubes defined in the data object.

Specifying the data to retrieve from a data object

Because a data object contains predesigned data sets, all you do is select a data set from the data object and the columns from the selected data set.

How to specify what data to retrieve from a data object

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the data object data source to use. Data Set Type displays Actuate Data Object Data Set.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.
- 3 In New Actuate Data Object Data Set, in Available Data Sets, select one of the data sets defined in the data object.
- 4 Select the columns to retrieve, and move them to the right pane.
- 5 Choose Finish to save the data set. Edit Data Set displays the columns in the data set, as shown in Figure 4-3.

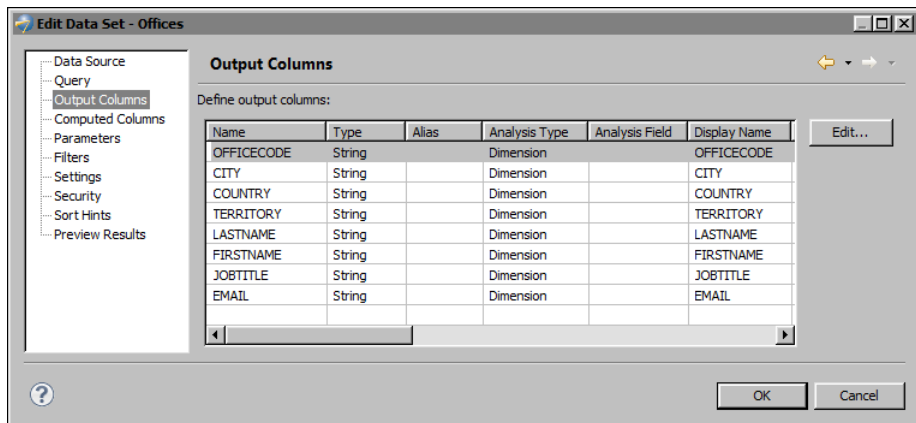


Figure 4-3 Columns in a data set

- 6 Choose Preview Results to view the data rows that the data set returns.
- 7 Choose OK to close the data set editor.

Using a cube in a data object

To add a cross tab to the report, a cube is required to provide data for the cross tab. You can create a cube, using data from a data set, or you can use a predefined cube in the data object. The option you choose depends on how familiar you are with creating cubes, whether you want modifications to the original cube to propagate to the cross tab, or whether you need control over the cube data. You cannot edit a cube from a data object.

How to use a cube in a data object

- 1 In Data Explorer, right-click Data Cubes, then choose Use Data Object Cube.
- 2 In Use Data Object Cube, specify the following information. Then choose OK.
 - 1 In Name, type a name for the cube.
 - 2 In Select Data Source, select the data source that connects to the data object that contains the cube.
 - 3 In Available Data Cubes, select a cube.

Figure 4-4 shows the selection of a cube named Revenue from a data object data source named Revenue Expenses Data Object.

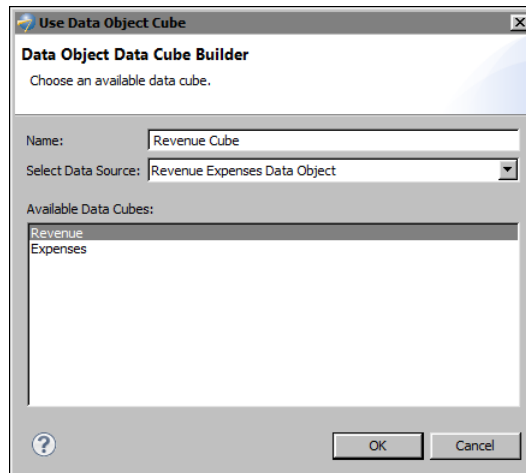


Figure 4-4 Cube selected from a data object

Accessing data in an information object

This chapter contains the following topics:

- Using information object data in a report
- Connecting to an information object
- Specifying the data to retrieve from an information object

Using information object data in a report

An information object is an encapsulated SQL query designed for use with report design applications, such as Actuate BIRT Designer and Actuate BIRT Studio. Created using the IO Design perspective in Actuate BIRT Designer, information objects can extract and integrate data from a variety of sources, including relational databases, stored procedures, web services, and XML documents. For information about creating information objects, see *Designing BIRT Information Objects*.

Information objects provide the following benefits that data objects also provide:

- Simplified data access and retrieval. Report developers select the data to use without knowledge of the underlying data source, how to connect to it, and how to extract data from it.
- Reusability across multiple reports. Reports can use the same set of data, yet can use different columns, sorting and grouping rules, filters, and parameters.
- Dynamic updates to data properties. Changes to an information object propagate to reports that use the information object, ensuring that reports have the latest updates, such as modified connection properties and queries.

As with other types of data sources, for a report to use data from an information object, you must create the following BIRT objects:

- A data source that contains the information to connect to an information object
- A data set that specifies the data to use from the information object

Connecting to an information object

Information objects are stored locally or in an Actuate BIRT iServer volume. To use an information object as a source of data for a report, you specify the location of the information object.

To connect to an information object published in iServer, you must have a user account on an iServer volume with the privileges that are required to access and run the information object. You need the following information to access an information object:

- The URL to the iServer and the name of the iServer volume that contains the information object
- Your login credentials

Contact the iServer administrator for this information.

How to connect to an information object

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select Actuate Information Object Data Source from the list of data source types, as shown in Figure 5-1.
 - 2 In Data Source Name, type a name for the data source.

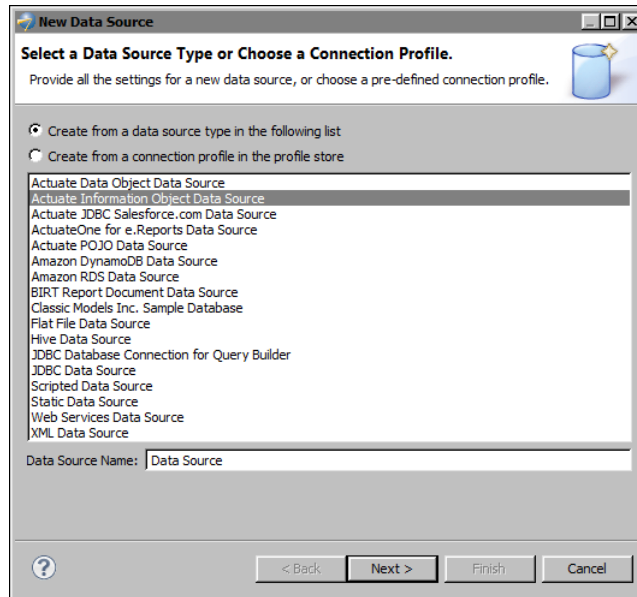


Figure 5-1 Selecting information object as a data source type

- 3 Choose Next.
- 3 In New Actuate Information Object Connection Profile, select one of the options to specify whether to use information objects stored locally or in an iServer volume. If you select Use Local Information objects, choose Finish.
- 4 If you select Use Published Information Objects, provide the following information to connect to the iServer volume on which the information object is stored:

- 1 In Server URI, type the URL to the iServer, using the following syntax:

`http://<server name>:<port>`

The following is an example of a URL:

`http://Athena:8700`

- 2 In Volume, type the name of the iServer volume that contains the information object.
- 3 In User Name, type the user name required to log in to the volume.
- 4 In Password, type the password required to log in to the volume.
- 5 In Use logged in user credentials on iServer, select Yes or No.
 - ❑ Select Yes to use the credentials of the user specified at login when the report is run on iServer. This option enables other users to run and view the report.
 - ❑ Select No to use the iServer URI, volume, user name, and password specified in the report design when the report is run on iServer. This option restricts access to the report.

Figure 5-2 shows an example of connection information specified for an information object data source that uses information objects published in an iServer volume.

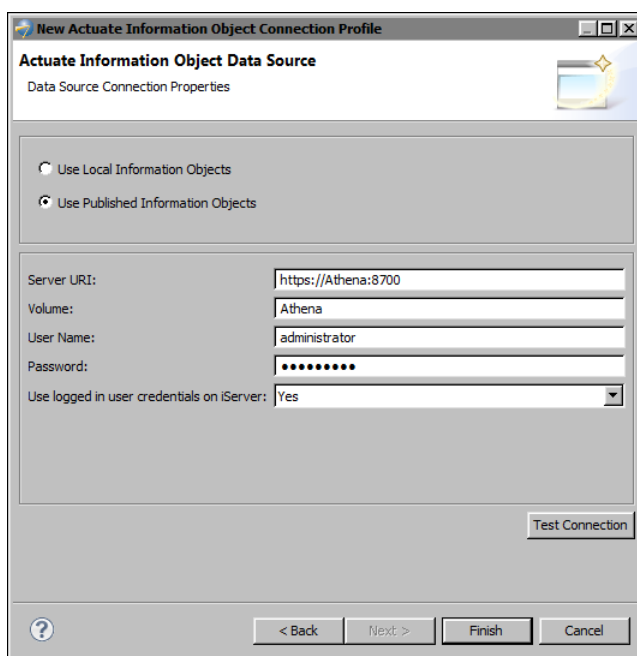


Figure 5-2 Information to connect to an information object in an iServer volume

- 5 Choose Finish.

The data source appears under Data Sources in Data Explorer.

Specifying the data to retrieve from an information object

An information object returns data rows in the structure required by BIRT reports. To specify what data rows to retrieve from an information object, you create a query using the Information Object Query Builder, which is integrated with the data set editor. The query builder provides a graphical interface that you use to select an information object, select data columns, specify group, sort, and filter criteria, and view the resulting query. Alternatively, if you are familiar with the content of an information object and are well-versed in Actuate SQL (based on the ANSI SQL-92 standard), you can type the query.

How to specify what data to retrieve from an information object

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the information object data source to use. Data Set Type displays Actuate Information Object Data Set.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.

New Data Set—Actuate Information Object Query appears, as shown in Figure 5-3.

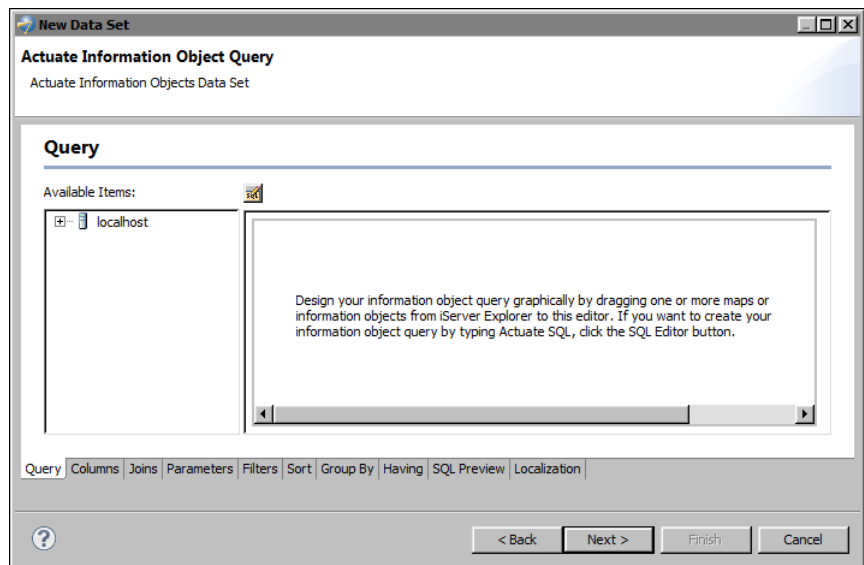


Figure 5-3 Information Object Query Builder

- 3 Create a query to specify the data to retrieve from the information object. Use either the graphical tools to create the query or the SQL Editor to type the query. For information about creating an information object query and using Actuate SQL syntax, see *Designing BIRT Information Objects*. The query builder integrated with the data set editor has the same user interface and functionality as the query builder in the Information Object Designer.

Figure 5-4 shows an example of a graphical query in which three information objects are joined. Only a few columns from each information object are selected.

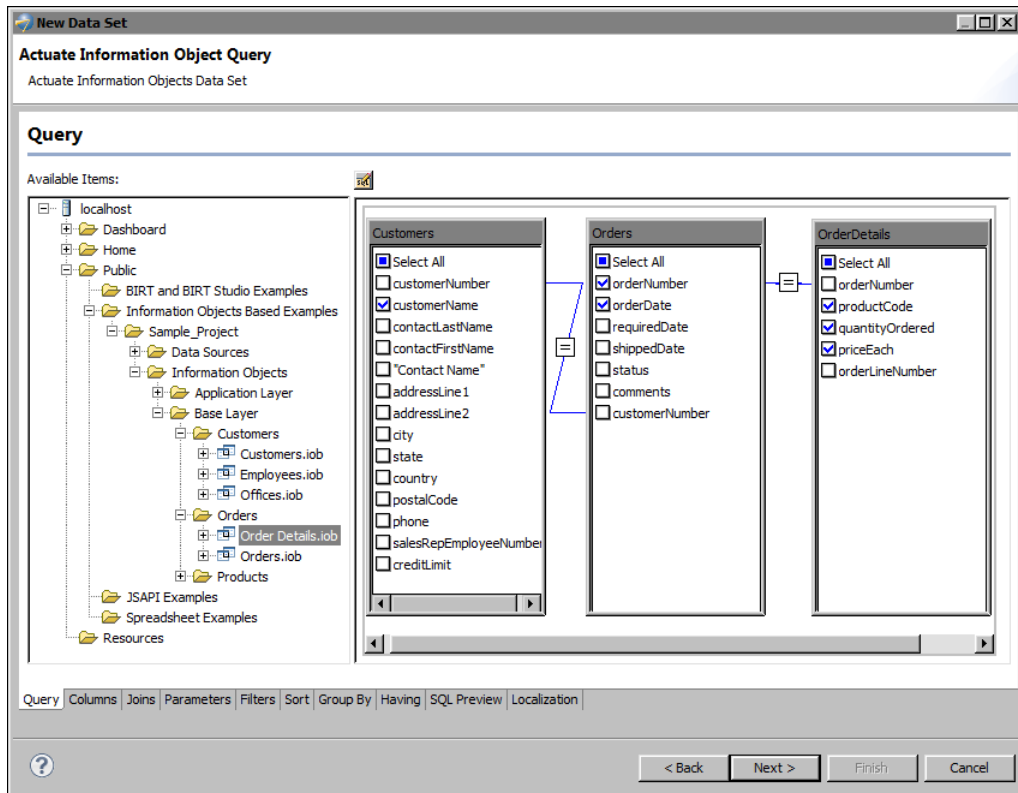


Figure 5-4 Information Object Query Builder displaying a graphical query

- 4 Choose Next. New Data Set—Actuate Information Object Query displays a message indicating the status of the query.
- 5 If the query contains errors, choose Back to fix the query. If the query is valid, choose Finish. Edit Data Set displays the columns in the data set, as shown in Figure 5-5.

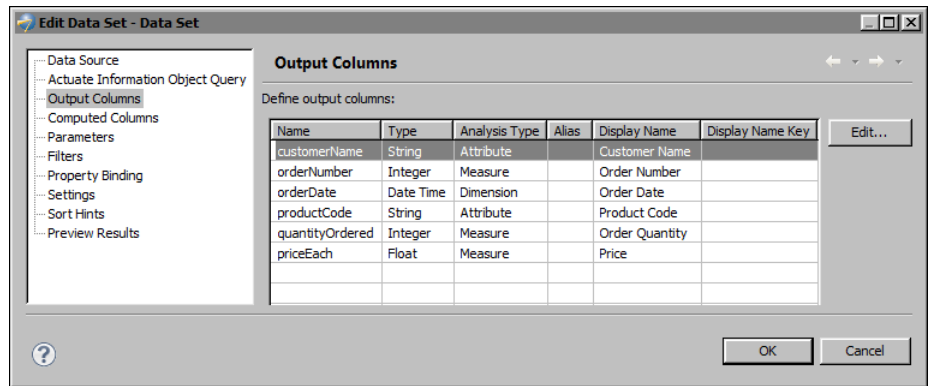


Figure 5-5 Columns in a data set

- 6 Choose OK to close the data set editor.

6

Accessing data in a report document

This chapter contains the following topics:

- Using report document data
- Creating a report document
- Connecting to a report document
- Specifying the data to retrieve from a report document

Using report document data

A report document is a binary file that contains report design information and cached data. It has the file extension .rptdocument. You can generate a report document from a report design, then use the report document as a data source for other reports. Using data from a report document provides the following benefits:

- Faster report-generation time because the report does not have to connect to an external data source, such as a database or web service, to retrieve data.
- Reuse of calculated data. If a table or chart in a report document contains calculated data, such as aggregations, that data is available to your report design.
- Simplifies report creation. You do not need to gather all the information to connect to an external data source, nor do you need to create the query to retrieve data from the data source. Eliminating these steps is particularly useful if data retrieval requires a complex SQL query to get data from a database, or a complex SOAP request to get data from a web service.

A report document provides efficient access to data, but at the cost of data possibly being out of date. It is most useful in cases where connecting to and querying a data source is resource-intensive, or when the data changes infrequently.

As with other types of data sources, for a report to use data from a report document, you must create the following BIRT objects:

- A data source that contains the information to connect to a report document
- A data set that specifies the data to use from the report document

Creating a report document

Generate a report document from a report design by choosing Run➤Generate Document. Specify the folder in which to save the report document. To share the report document with other report developers, put the file in a shared resource folder.

When used as a data source, the report document provides access to its result sets. At report generation, a result set is created for each table, chart, cross tab, and list. The data in a result set is defined by the data column bindings created for a table, chart, cross tab, or list. A report design has access to all result sets in a report document, except for a cross tab's result set.

For example, Figure 6-1 shows a report that displays sales data in two tables and a chart.

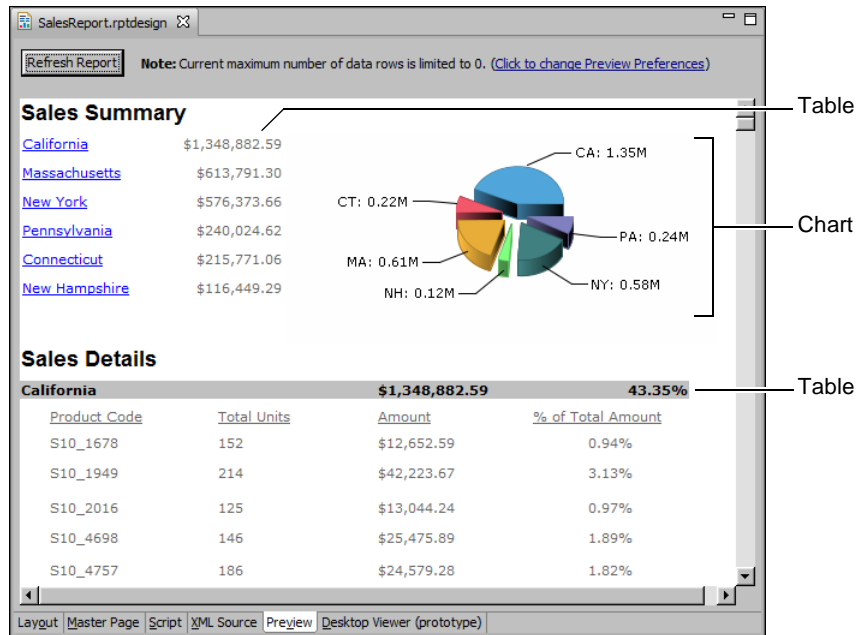


Figure 6-1 A report displaying data in two tables and a chart

A report design that uses a report document generated from this report has access to the result sets generated for the two tables and the chart. When you create a data set to specify which result set data to use, the data set editor displays all the available results sets, as shown in Figure 6-2.

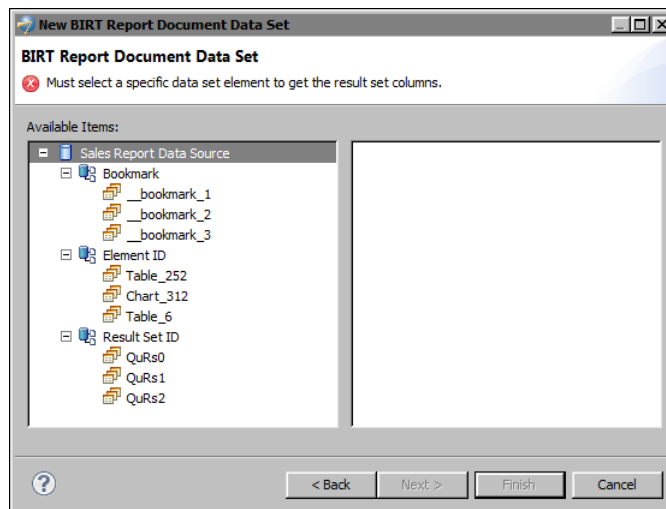


Figure 6-2 Data set editor displaying available result sets with default names

The result sets are organized under three categories: Bookmark, Element ID, and Result Set ID. The result sets named __bookmark_1, __bookmark_2, and __bookmark_3 correspond to the result sets for the first table, the chart, and the second table, respectively. Similarly, the result sets named Table_252, Chart_312, and Table_6 correspond to the result sets for the first table, the chart, and the second table. Finally, the result sets named QuRs0, QuRs1, and QuRs2 also correspond to the result sets for the first table, the chart, and the second table.

While it seems redundant to provide three methods to select any given result set, each method offers different benefits.

- For result sets that appear under Bookmark, the report developer designing the report from which a report document is generated can specify descriptive names. The name can be a literal string or an expression.
- For results sets that appear under Element ID, the report developer can also specify descriptive names, but can only use literal strings to do so. Result sets are also organized hierarchically if a report, such as a master-detail report, contains nested tables.
- For result sets that appear under Result Set ID, the report developer cannot specify alternate names. These generated names are useful for accessing a result set programmatically.

Figure 6-3 shows another example of the data set wizard displaying the result sets available to a report design.

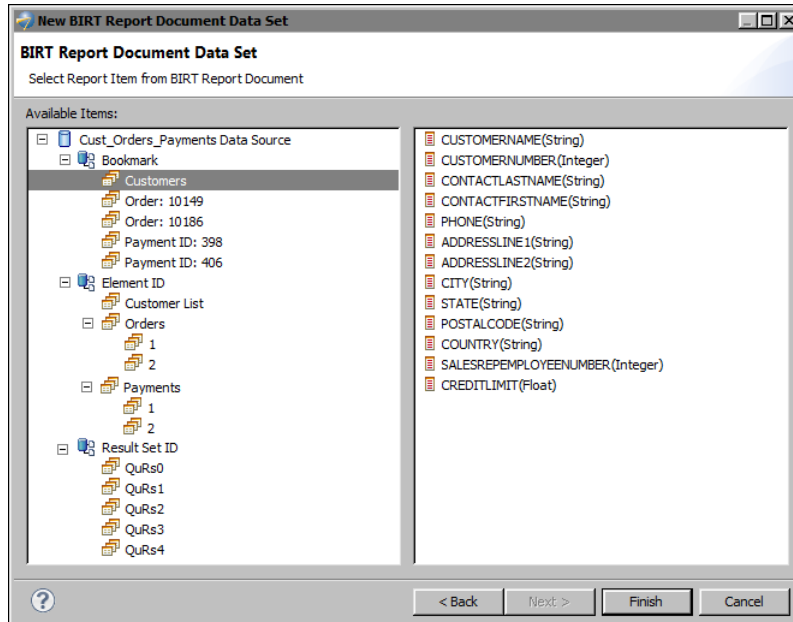


Figure 6-3 Data set editor displaying two result sets with custom names

This time, the result sets under Bookmark use custom names, rather than the default __Bookmark_#. Result sets under Element ID are organized hierarchically under Orders and Payments, which are custom names. This hierarchy reflects the structure of data in the report document.

Specifying bookmark names

As Figure 6-2 showed, BIRT generates a bookmark for each result set, and assigns bookmark names using the __bookmark_# format. If you are designing the report from which to generate a report document, you can specify more descriptive bookmark names to better identify the data in result sets. For example, instead of using the default name, __bookmark_1, to refer to the result set for the sales summary table, specify a name, such as Sales Totals by State.

How to specify a bookmark name

- 1 Open the report design to be used to generate a report document.
- 2 In the report layout, select the table, chart, or list for which to specify a bookmark.
- 3 In Properties Editor—Properties, choose Bookmark.
- 4 In Bookmark, specify one of the following:
 - A name, such as "Sales Totals by State". If typing a name, enclose it within double quotation marks, as shown in Figure 6-4.

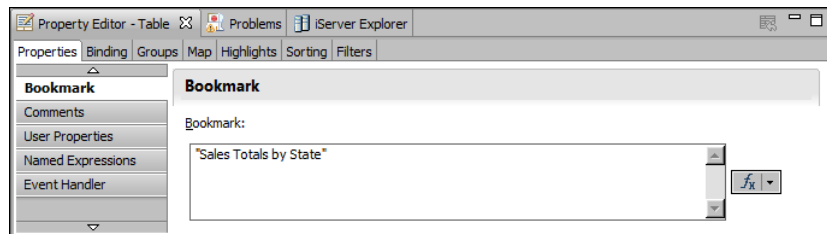


Figure 6-4 Specifying a bookmark name for an element

- An expression, such as the following:

```
row["COUNTRY"]  
"Order: " + row["ORDERNUMBER"]
```

Specify an expression if, for example, a table is nested within another table or a list. In this case, the generated report document typically contains multiple instances of the inner table, and each table instance has a result set. If each table instance provides data about a particular sales order, for example, it is useful to identify each result set by order number, as shown in Figure 6-3.

- 5 Save the report.

Specifying element names

BIRT also assigns an element ID for each result set. As Figure 6-2 showed, each ID consists of the element type, an underscore, and a number, for example, Table_252 or Chart_312. If you are designing the report from which to generate a report document, you can specify more descriptive element IDs to describe the data in result sets.

How to specify an element name

- 1 Open the report design to be used to generate a report document.
- 2 In the report layout, select the table, chart, or list for which to specify a name.
- 3 In Properties Editor—Properties, choose General.

Notice that the Name property is undefined. Notice, too, that the Element ID property has a read-only number, which BIRT automatically assigns to every report element. BIRT uses this number in the default result set name.

- 4 In Name, type a descriptive and unique name. A report cannot contain duplicate element names. Figure 6-5 shows an example of a name, Sales Chart, specified for a chart.

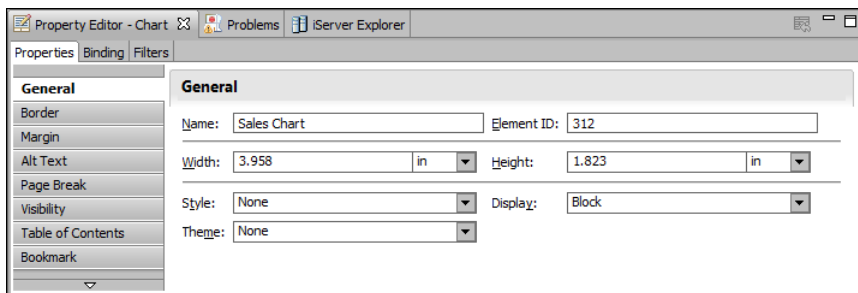


Figure 6-5 Specifying a name for a chart element

- 5 Save the report.

Connecting to a report document

When creating a data source to connect to a report document, the only information required is the location and name of the report document.

How to connect to a report document

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:

- 1 Select BIRT Report Document Data Source from the list of data source types, as shown in Figure 6-6.
- 2 In Data Source Name, type a name for the data source.

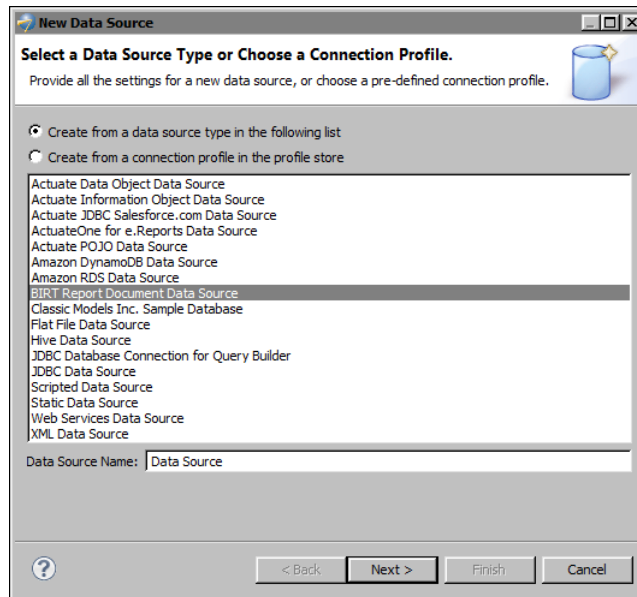


Figure 6-6 Selecting BIRT report document as a data source type

- 3 Choose Next.
- 3 In New BIRT Report Document Data Source Profile, use one of the following steps to provide a value for Report Document Path:
 - To select a report document in the resource folder, choose Browse. Select the report document, then choose OK.
 - To select a report document in a location other than the resource folder, click the arrow next to Browse, and choose Absolute Path. Navigate to the folder where the report document is stored, select the report document, then choose OK.

Figure 6-7 shows an example of a report document data source that connects to a file named SalesReport.rptdocument in the resource folder.

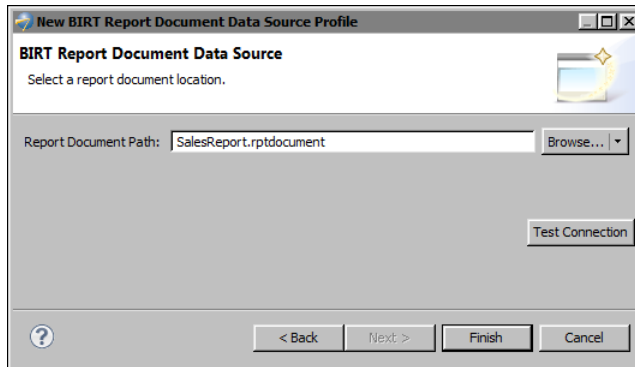


Figure 6-7 Report document selected

- 4 Choose Finish.

The data source appears under Data Sources in Data Explorer. The report now has access to the data saved in the report document.

Specifying the data to retrieve from a report document

Because a report document contains cached data in the form of result sets, all you do is select the result set or result sets whose data to use in a report design. You must create a data set for each result set.

How to retrieve data from a report document

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the report document data source to use. Data Set Type displays BIRT Report Document Data Set.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.

New BIRT Report Document Data Set displays all the result sets in the report document. These items are organized under Bookmark, Element ID, and Result Set ID.

- 3 Expand a category, then select a result set to see its data columns, as shown in Figure 6-8.

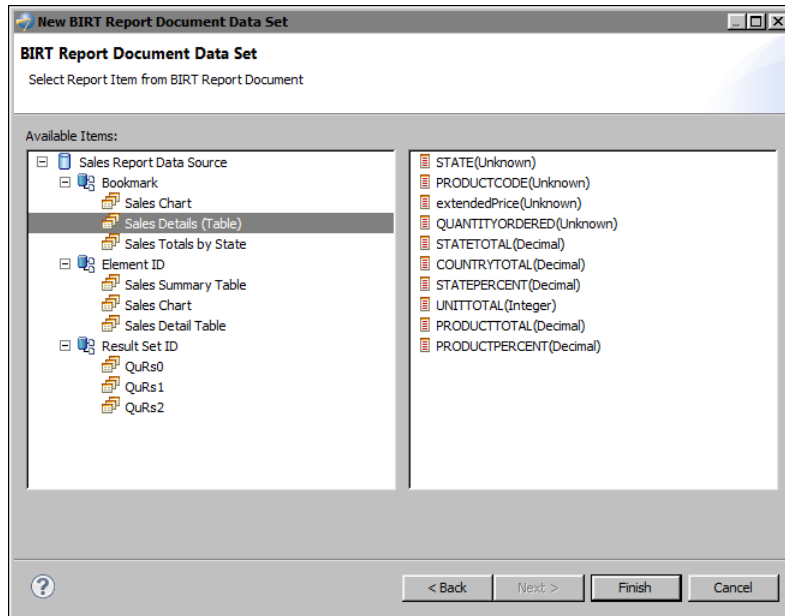


Figure 6-8 Selecting a result set

- 4 Select the result set that contains the data to use in the report, then choose Finish. Edit Data Set displays the columns in the data set, as shown in Figure 6-9.

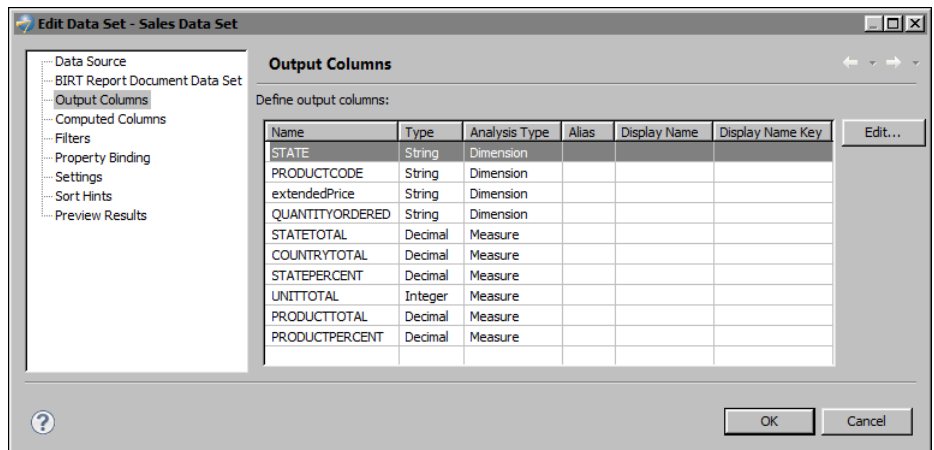


Figure 6-9 Columns in a data set

- 5 Choose Preview Results to view the data rows that the data set returns.
- 6 Choose OK to close the data set editor.

7

Accessing data in an e.report

This chapter contains the following topics:

- Using ActuateOne for e.Reports Data Connector
- Connecting to an e.report
- Specifying the data to retrieve from an e.report

Using ActuateOne for e.Reports Data Connector

The ActuateOne for e.Reports Data Connector is an open data access (ODA) driver that enables BIRT to retrieve data from an e.report, a report designed and generated using Actuate e.Report Designer Professional. The e.report is a report object instance (.roi) file. Using the ActuateOne for e.Reports Data Connector driver to access the data and business logic from the existing e.report's data schema preserves the business logic in the report while BIRT consumes the data.

For more information about e.reports, see *Working with Actuate e.Reports*.

About ActuateOne for e.Reports Data Connector functionality

A BIRT data object, information object, or report design can use the data connector to retrieve data from an existing ROI file in an Encyclopedia volume on Actuate BIRT iServer Release 11 or higher. The ROI file does not need to be on the same Encyclopedia volume as the BIRT report design.

The report object design (.rod) file used to generate the ROI file must have searchable fields defined. The ActuateOne for e.Reports Data Connector uses the display names for the searchable fields to name the columns in the BIRT data set.

An ActuateOne for e.Reports data source connects to an Encyclopedia volume. An ActuateOne for e.Reports data set maps controls in a selected e.report to data set columns. The user interface for creating the data set displays the control names as available columns. The names of the columns that the e.report data source uses are not available.

Accessing an e.report using Page Level Security

The ActuateOne for e.Reports Data Connector respects the Page Level Security (PLS) privileges implemented in the source e.report. The BIRT report developer must specify user credentials for an ROI file in order to retrieve data from that ROI file. PLS privileges of the specified user restrict the data that the BIRT report design retrieves from the ROI file.

Accessing an e.report having multiple sections

A BIRT report design can retrieve data from a complex, multi-section e.report. Each data set, however, can access data from a single section only. For example, if an e.report contains parallel sections to display an orders report and a payments report side-by-side, a data set can access data either from the orders report or the payments report, but not from both.

A data set is also limited to accessing data from either data controls or page controls, but not from both. Typically, a BIRT report uses data from data controls.

To determine which controls are available for use in the same data set, open the ROD file in e.Report Designer Professional to view the report structure. If the ROD file is not available, use the Output Columns page in Edit Data Set in BIRT Designer Professional to examine the partially scoped name of each column. The name's scope appears before the scope resolution operator (::), as shown in the following example:

```
SalesRepTitleFrame::SalesRepTotal
```

Connecting to an e.report

When creating an ActuateOne for e.Reports data source in a BIRT report to connect to an e.report, you specify the Encyclopedia volume that contains the ROI files. You specify iServer connection properties and the name of the Encyclopedia volume. Specify the use of a trusted connection to improve performance. As you edit the data source and the data set, a trusted connection uses the same session to communicate with the iServer. A non-trusted connection uses the specified credentials to log in to the iServer for each communication.

How to create an ActuateOne for e.Reports data source

- 1 In Data Explorer, right-click Data Sources and choose New Data Source.
- 2 In New Data Source, select ActuateOne for e.Reports Data Source, as shown in Figure 7-1. Choose Next.

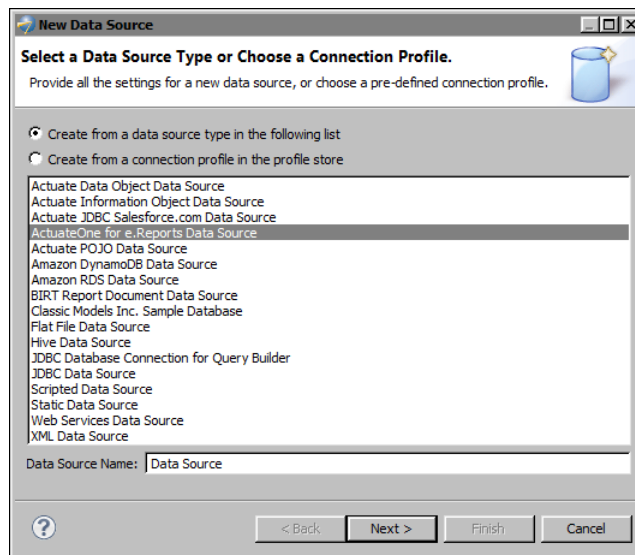


Figure 7-1 Selecting ActuateOne for e.Reports Data Source

- 3 In New ActuateOne for e.Reports Data Source Profile, type the URL of the server, the user credentials, the volume name, and whether the connection is trusted, as shown in Figure 7-2.

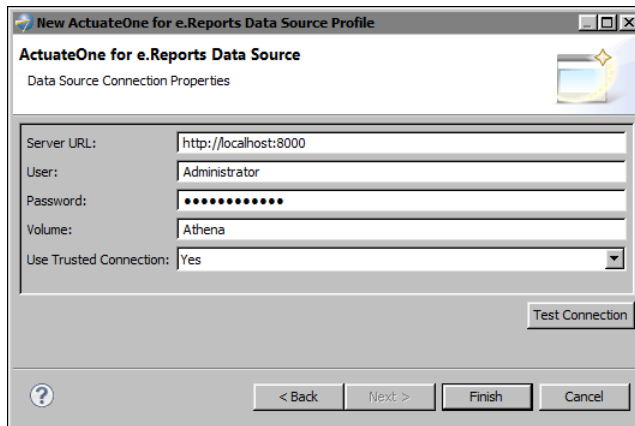


Figure 7-2 Creating a data source profile

- 4 Choose Test Connection to ensure that the connection information is correct. If Test Connection returns an error, repeat the preceding steps to correct the error. Choose OK if the connection is successful.
- 5 Choose Finish.

Specifying the data to retrieve from an e.report

The controls in an e.report provide the columns for a data set. As discussed earlier, you must use columns from controls in only a single section in the e.report, and you must use either data controls or page controls. The scoped name of the column shows the section that contains the control. This name is available in the user interface for editing the data set.

How to create an ActuateOne for e.Reports data set

- 1 In Data Explorer, right-click Data Sets and choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the ActuateOne for e.Reports data source to use. Data Set Type displays ActuateOne for e.Reports Data Set.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.
- 3 In Select Columns, choose Browse.

- 4 Navigate to the location of the ROI file and select the ROI file, as shown in Figure 7-3. Choose OK.

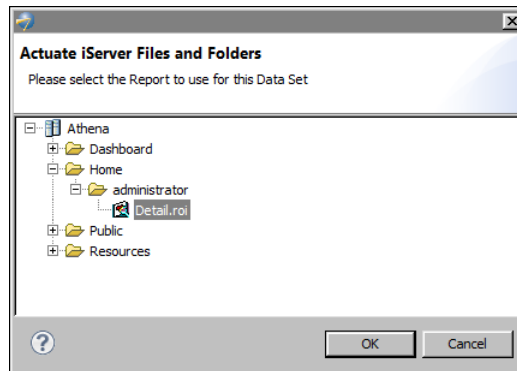


Figure 7-3 Selecting the ROI file

- 5 In Select Columns, choose Refresh Columns. Available Columns displays the column names from the ROI file, as shown in Figure 7-4.

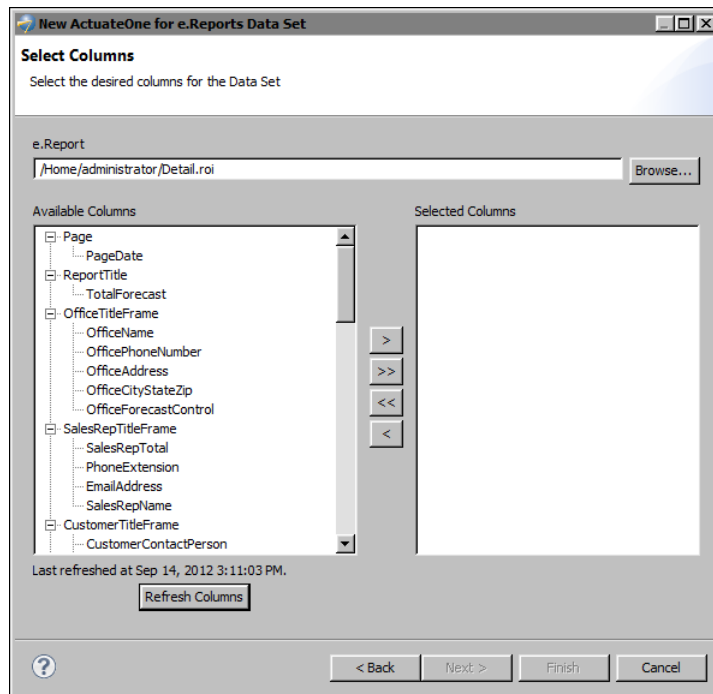


Figure 7-4 Available columns in Detail.roi

- 6 Select the columns to include in the report. Choose the right arrow to move the columns to the Selected Columns pane, as shown in Figure 7-5.

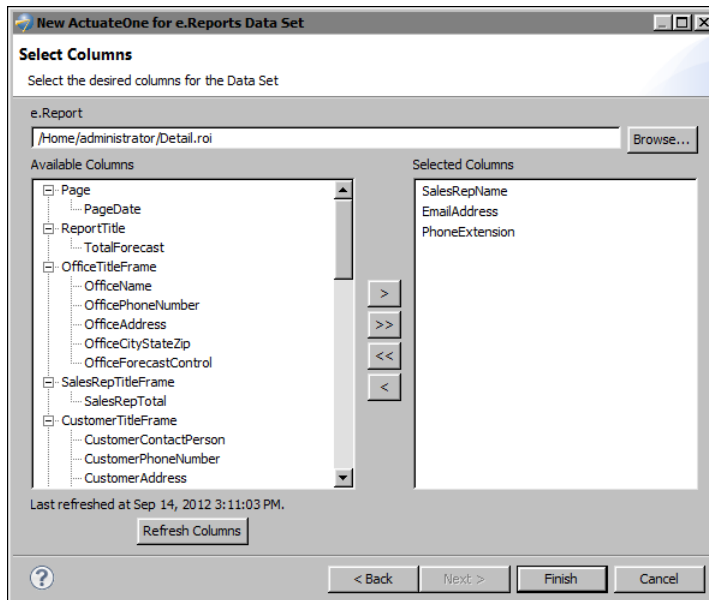


Figure 7-5 Selecting columns

Choose Finish.

- 7 In Edit Data Set, select Preview Results. Figure 7-6 shows the data rows returned by the data set.

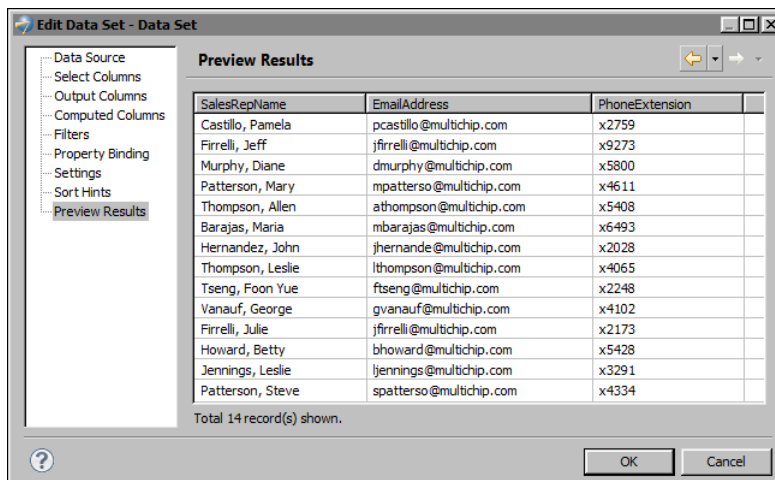


Figure 7-6 Preview of data set results

If the error message shown in Figure 7-7 appears, you selected columns from different sections in the e.report.

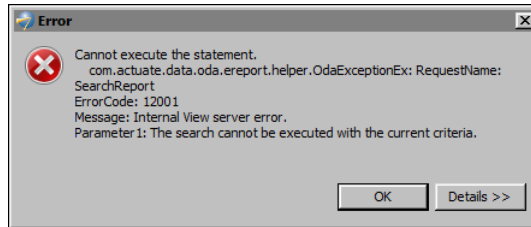


Figure 7-7 Error message displayed when the selected columns are from different sections

If the error message shown in Figure 7-8 appears, you selected columns from both data and page controls.

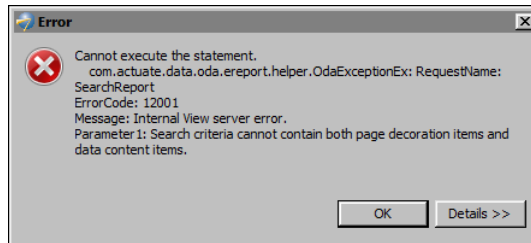


Figure 7-8 Error message displayed when selected columns are from data and page controls

8 To resolve these errors, perform the following steps:

- 1 In the error message, choose OK.
- 2 Choose Output Columns.
- 3 Expand Name to make the full names of the output columns visible, as shown in Figure 7-9.

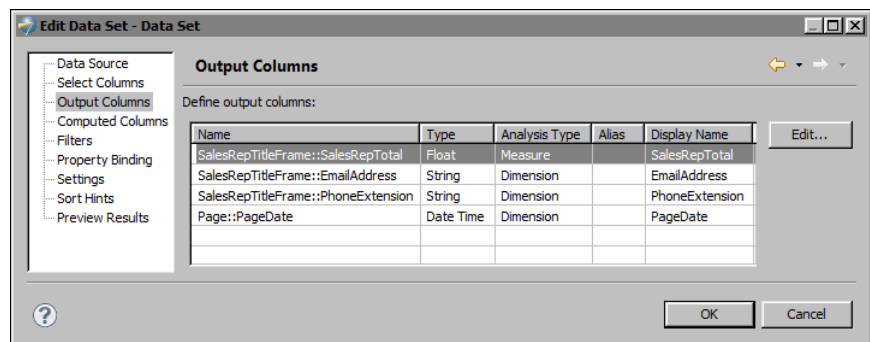


Figure 7-9 Checking scope prefixes

Note each name's prefix. In the example shown in Figure 7-9, the first three columns are in the SalesRepTitleFrame component, and the fourth is in the Page component. This information indicates that the first three columns are from data controls, and the fourth column is from a page control.

- 4 Choose Select Columns. In Selected Columns, remove the incompatible columns.
- 5 Choose Preview Results to verify that the data set returns data rows.

Accessing data in Amazon DynamoDB

This chapter contains the following topics:

- Using Amazon DynamoDB data in a report
- Connecting to Amazon DynamoDB
- Specifying the data to retrieve from Amazon DynamoDB

Using Amazon DynamoDB data in a report

Amazon DynamoDB is a fully-managed database service that supports the operations of a non-relational, or NoSQL, database in the cloud. Organizations use Amazon DynamoDB to manage large volumes of data that do not require the features of a relational database, and to offload the administrative costs and complexities of operating a database.

Amazon DynamoDB is a schema-less database, and does not support relational queries, such as joins, or complex transactions. It is particularly useful for storing data, such as product catalogs, logs, or forum postings, where the data structure does not require a relational model.

An Amazon DynamoDB database organizes data into tables. A table is a collection of items and each item is a collection of attributes. For example, a products table can contain items, such as books, DVDs, and CDs. A book item can have ID, title, author, publisher, and ISBN attributes. A CD item can have ID, title, and artiste attributes. Unlike a database with a schema, items in an Amazon DynamoDB table are not required to have the same number or types of attributes.

Each attribute is a name-value pair. The value can be a single value or a multi-value set, as shown in the following examples:

```
Author = "J.K. Rowling"
```

```
Author = "Susan Smith", "John Smith"
```

For each item, one attribute—typically an ID—must be a primary key that identifies the item in a table. The primary key is the only part of the table that is indexed, and it is also used to hash partition data across multiple servers.

Actuate BIRT Designer supports access to data in Amazon DynamoDB. As with other types of data sources, for a report to use data from Amazon DynamoDB, you must create the following BIRT objects:

- A data source that contains the information to connect to a DynamoDB database.
- A data set that specifies the data to retrieve

Connecting to Amazon DynamoDB

Actuate BIRT Designer provides an ODA (Open Data Access) driver to connect to Amazon DynamoDB. You provide the regional endpoint to a web service to access an Amazon DynamoDB database, as well as, your access credentials.

How to create an Amazon DynamoDB data source

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.

- 2 In New Data Source, specify the following information:
 - 1 Select Amazon DynamoDB Data Source from the list of data source types.
 - 2 In Data Source Name, type a name for the data source.
 - 3 Choose Next.
- 3 In New Amazon DynamoDB Data Source Profile, specify the properties to connect to your Amazon DynamoDB database instance.
 - 1 In AWS Region Endpoint URL, specify the regional endpoint to the web service to which to make requests. The default value specifies the US-East region, which the AWS SDKs and console for Amazon DynamoDB reference. For a list of supported regions and endpoints, see the Amazon DynamoDB documentation.
 - 2 In Amazon Web Services Access credentials, type your user credentials to log in to the system. Set Use Security Token Service to yes to use temporary security credentials.
 - 3 In Amazon Web Services Client Configuration:
 - ❑ In Connection Timeout, specify the number of milliseconds to wait for a connection.
 - ❑ In Maximum Number of Retries, specify the number of times to attempt to connect until a successful connection is established.
 - ❑ In Data Transfer Timeout, specify the number of milliseconds to wait for a response to a data request.

Figure 8-1 shows an example of properties to connect to a database instance in Amazon DynamoDB.

The screenshot shows a Windows-style dialog box titled "New Amazon DynamoDB Data Source Profile". The main title bar says "Amazon DynamoDB Data Source" and the subtitle is "Data Source Connection Properties". The dialog contains several sections with input fields:

- AWS Region Endpoint URL:** A text box containing "https://dynamodb.us-east-1.amazonaws.com/".
- Amazon Web Services Access Credentials:** A section containing:
 - AWS Access Key Id:** A text box containing "AKYDI6QURMKNLNGGIQPA".
 - Secret Access Key:** A text box with masked characters (dots).
 - Use Security Token Service:** A dropdown menu currently set to "no".
- Amazon Web Services Client Configuration:** A section containing:
 - Connection Timeout (in ms):** A text box containing "50000".
 - Maximum Number of Retries:** A text box containing "10".
 - Data Transfer Timeout (in ms):** A text box containing "50000".

At the bottom right of the dialog is a "Test Connection" button. At the very bottom are four buttons: "< Back", "Next >", "Finish", and "Cancel".

Figure 8-1 Connection properties for an Amazon DynamoDB database

Specifying the data to retrieve from Amazon DynamoDB

Once the report connects to an Amazon DynamoDB database, you create a data set and select the table from which to retrieve data. A data set can retrieve data from one table only.

After selecting a table, you select the attributes from which to retrieve data. BIRT maps each selected attribute to a data set column. Because DynamoDB is a schema-less database in which each table item can contain a different set of attributes, you have the option of specifying the number of items to scan to compile the list of attributes. Scanning items in a table can be resource intensive. If all the table items contain the same attributes, specify one (the default) as the number of items to scan.

How to specify what data to retrieve from an Amazon DynamoDB database

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the Amazon DynamoDB data source to use. Data Set Type displays Amazon DynamoDB Data Set.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.
- 3 In New Data Set, in Query, do the following:
 - 1 In DynamoDB Table, select the table from which to retrieve data.
 - 2 In Number of Items to Scan for Attributes, type the number of table items for which to search for attributes, then choose Scan. The fewer the number of items to scan, the faster the response.

Available Attributes displays the attributes defined in the scanned items. If you do not see the attributes you expect and want, increase the number of items to scan, then choose Scan.
 - 3 In Available Attributes, select the attribute or attributes whose data to retrieve.
 - 4 If Searchable by Composite Key is available, you can filter the data to retrieve by searching for a hash key value, a range key value, or both. For information about this task, see “Filtering by a composite primary key,” later in this chapter.
 - 5 In Advanced Settings, specify the following options:
 - ▢ In AWS fetch size, type the maximum number of items to return in each web service call to the database, or select No fetch size limit. If you

select the latter, each fetch operation returns the entire result set up to 1MB, the limit set by Amazon DynamoDB. The smaller the fetch size value, the faster the response time per web service call. The higher the fetch size, the fewer the calls to fetch data.

- ❑ Select the Eventually consistent reads option to maximize the read throughput. Deselect this option to request a strongly consistent read, which returns a result that reflects all writes that receive a successful response prior to the read.
- ❑ In Separator character(s) in a multi-valued set column, specify the character to use to separate values in a multi-value set. By default, BIRT returns a multi-value set as a string in the following format:

Value1 | Value2 | Value3

You can change the separator character to a comma, for example, to return results in the following format:

Value1, Value2, Value3

Figure 8-2 shows an example of an Amazon DynamoDB query.

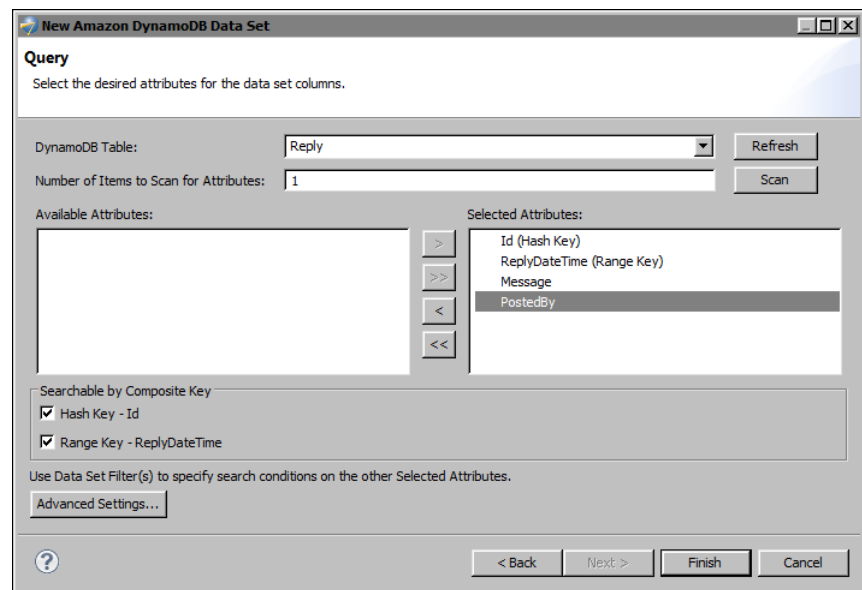


Figure 8-2 Example of an Amazon DynamoDB query

- 4 Choose Finish to save the data set. Edit Data Set displays the columns, and provides options for editing the data set.
- 5 Choose Preview Results to view the data rows returned by the data set.

Filtering data

Amazon DynamoDB is designed to store large volumes of data across multiple servers. Database users must design tables for efficient write and read operations. As discussed earlier, the required primary key is the only part of a table that is indexed, and it is also used to hash partition data across multiple servers.

Amazon DynamoDB supports two types of primary keys:

- Hash primary key, which consists of one attribute. For example, a product catalog table can use ProductID as its primary key.
- Composite primary key, which consists of two attributes. The first attribute is a hash attribute and the second attribute is a range attribute. For example, a forum table can use ForumName and Subject as its primary key, where ForumName is the hash attribute and Subject is the range attribute.

A table's primary key type determines how you specify a filter condition, and how Amazon DynamoDB searches for data, as the following sections describe.

Filtering by a composite primary key

A composite key supports searching for a specific value in the hash attribute, and can include searching on the range attribute as well. Searching on both attributes narrows a search. When a composite primary key is defined for a table, Amazon DynamoDB uses its Query API to search on the key index only. This type of search is typically efficient.

If you select a table that uses a composite primary key, the query page of the data set editor displays the Searchable by Composite Key option, as shown in Figure 8-3. This option is disabled if the selected table uses a hash primary key.

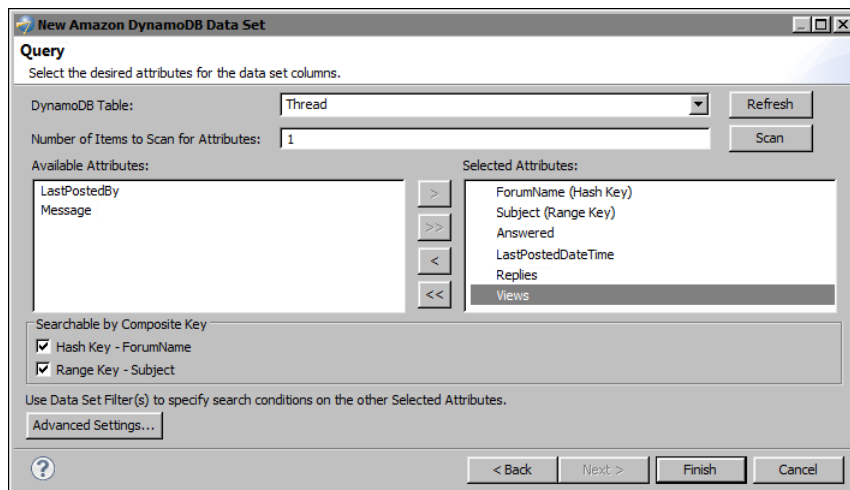


Figure 8-3 Query page displaying the Searchable by Composite Key option

In this example, the hash attribute is ForumName and the range attribute is Subject. You can select one or both of these attributes on which to filter. Each attribute you select creates a corresponding data set parameter, as shown in Figure 8-4.

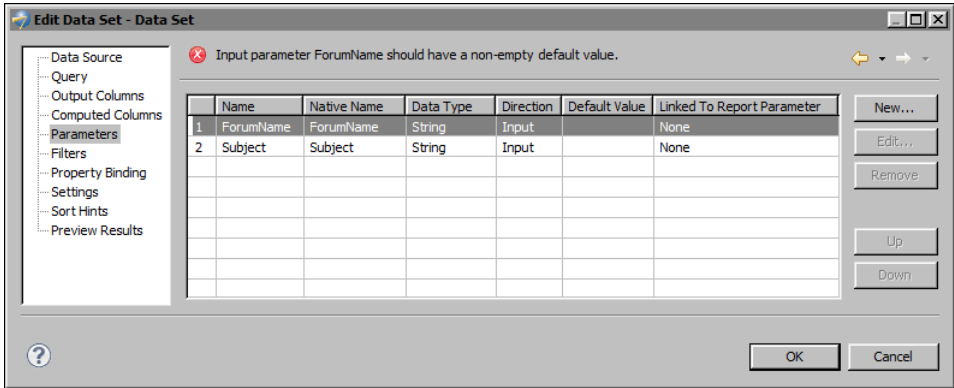


Figure 8-4 Data set parameters associated with the selected attributes in the composite primary key

You must edit each data set parameter to specify the attribute value to search. Figure 8-5 shows searching for the value Amazon DynamoDB in the ForumName hash attribute.

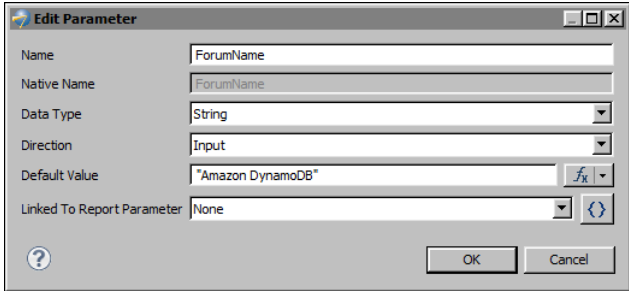


Figure 8-5 Parameter value specified for an attribute in a composite primary key

Filtering by an attribute

You can filter data by any attribute selected in a data set. When filtering by an attribute that is not a primary key, Amazon DynamoDB uses its Scan API to scan the entire table, then filters out values to provide the desired result set. This type of search is not efficient, and slows down as a table grows.

To filter by an attribute that is not a composite primary key, use the Filters page in the data set editor. Figure 8-6 shows an example of a filter condition created for the Product Catalog data set, where the BicycleType attribute is equal to Road.

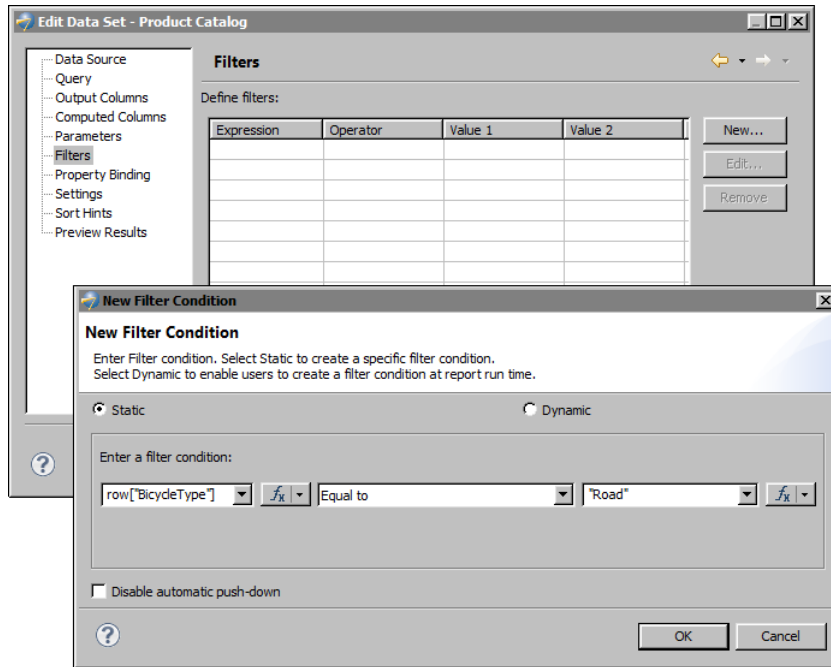


Figure 8-6 A filter condition specified for an attribute

This filter condition uses the Equal to operator, which looks for an exact match. With this filter, a match is found if the BicycleType attribute contains the single value, Road. As mentioned earlier, an attribute, however, can contain a multi-value set, which BIRT returns in value1 | value2 | value3 format. If the BicycleType attribute contains a multi-value set, such as Road | Hybrid, there is no match.

If you do not know whether a string attribute contains a single value or a multi-value set, do not use the Equal to operator in the filter condition. Instead, use the following operator:

Contains substring, or value in a set

To exclude a value when comparing values in a multi-value set, use the following operator:

Absence of substring, or value in a set

Figure 8-7 shows a filter condition where the Color attribute must contain the value Red.

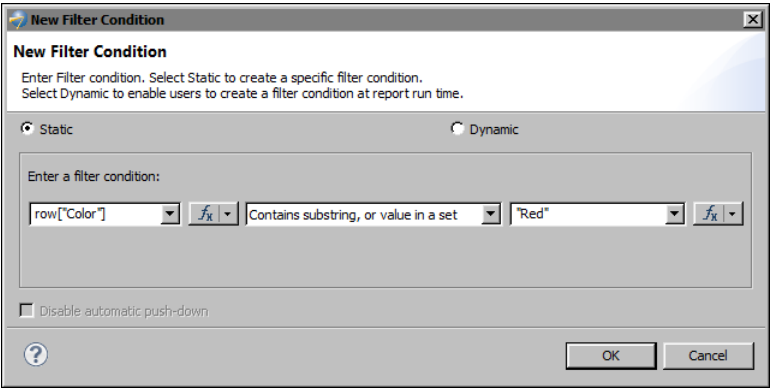


Figure 8-7 A filter condition specified for an attribute that contains a multi-value set

Figure 8-8 shows the data rows returned when the filter condition in Figure 8-7 is applied. The Color column in each row contains the value Red.

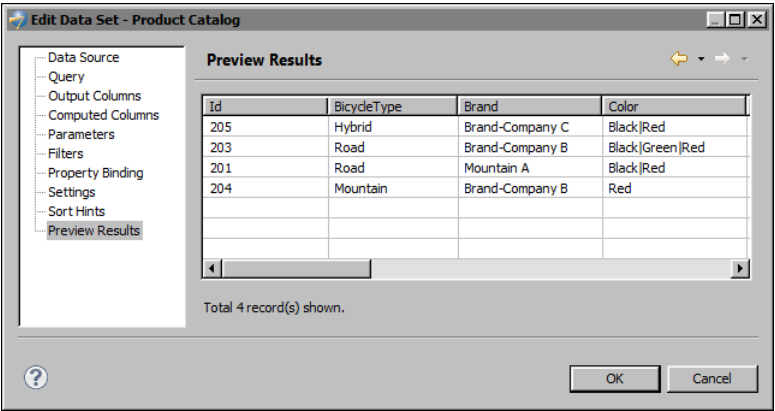


Figure 8-8 Results of applying a filter condition

Accessing data in Amazon Relational Database Service

This chapter contains the following topics:

- Using Amazon RDS data in a report
- Connecting to Amazon RDS
- Specifying the data to retrieve from Amazon RDS

Using Amazon RDS data in a report

Amazon Relational Database Service (RDS) is a web service that supports the operations of a relational database in the cloud. It provides access to a MySQL or Oracle database and manages all the administrative tasks, including hardware and software configuration and updates, automated backups, and system monitoring.

Organizations use Amazon RDS to manage their database deployment in the cloud, paying only for the computing resources and storage that their database instance uses. By off-loading the costs and complexities of purchasing and maintaining hardware and database software, organizations can focus on their business applications.

Actuate BIRT Designer supports access to data in Amazon RDS. As with other types of data sources, for a report to use data from Amazon RDS, you must create the following BIRT objects:

- A data source that contains the information to connect to a MySQL or Oracle database in Amazon RDS.
- A data set that specifies the data to retrieve

Connecting to Amazon RDS

Actuate BIRT Designer provides two JDBC drivers to connect to MySQL and Oracle, the databases supported by Amazon RDS. You provide the URL to connect to the specific database instance on Amazon RDS, and your login credentials. The URL, or endpoint, is available in the DB Instance description in Amazon's AWS (Amazon Web Services) Management Console.

How to create a Amazon RDS data source

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select Amazon RDS Data Source from the list of data source types.
 - 2 In Data Source Name, type a name for the data source.
 - 3 Choose Next.
- 3 In New Amazon RDS Data Source Profile, specify the properties to connect to the MySQL or Oracle database instance on Amazon RDS.
 - 1 In Driver Class, select either the MySQL or Oracle JDBC driver.
 - 2 In Endpoint, type the URL to the database instance.

- 3 In User Name and Password, type the user credentials to log in to the system.

Figure 9-1 shows an example of properties to connect to a MySQL database instance in Amazon RDS.

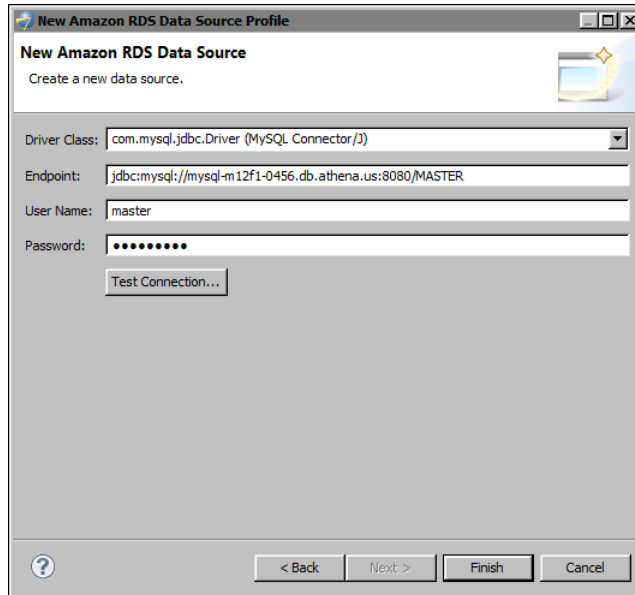


Figure 9-1 Connection properties for a MySQL instance on Amazon RDS

Specifying the data to retrieve from Amazon RDS

Once the report connects to a MySQL or Oracle database in Amazon RDS, you create a data set and write a SQL query to specify what data rows to retrieve.

How to specify what data to retrieve from a database in Amazon RDS

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the Amazon RDS data source to use. Data Set Type displays SQL Select Query.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.
- 3 In New Data Set, in Query Text, type a SQL statement that indicates what data to retrieve.

- 4** Choose Finish to save the data set. Edit Data Set displays the columns, and provides options for editing the data set.
- 5** Choose Preview Results to view the data rows returned by the data set.

10

Accessing data in a Hadoop system

This chapter contains the following topics:

- Using Hadoop data in a report
- Connecting to a Hadoop system
- Specifying the data to retrieve from a Hadoop system

Using Hadoop data in a report

With data storage requirements approaching several petabytes, relational databases no longer meet the needs of many organizations. Facebook, for example, analyzes 15 terabytes of log data each day. To store and process vast amounts of data, organizations use “big data” systems such as Hadoop. An open-source software framework designed for scalable, distributed computing, Hadoop spreads and manages data on clusters of servers and coordinates work among them.

To achieve reliability and efficiency in distributed processing, Hadoop uses a MapReduce programming model, which uses map and reduce operations to divide data-intensive tasks, such as data searches or data aggregation, into discrete tasks that can be done in parallel across clusters of servers. The map phase occurs when each discrete task is distributed, or mapped, to all the servers. The reduce phase occurs when the intermediate results are merged, or reduced, into one result set.

Actuate BIRT Designer supports access to Hadoop data through Hive, which is a data warehouse infrastructure built on top of Hadoop. Hive facilitates data summarization, queries, and analysis. It provides a mechanism for structuring large data sets and querying the data using a SQL-like language called Hive Query Language (HQL). By using Hive to access data, you can write HQL queries, instead of MapReduce functions, to specify the data to retrieve.

As with other types of data sources, for a report to use data from a Hadoop system, you must create the following BIRT objects:

- A data source that contains the information to connect to a Hive system
- A data set that specifies the data to retrieve

Connecting to a Hadoop system

Actuate BIRT Designer provides a JDBC driver to connect to a Hadoop system through Hive. Similar to connecting to a database, you provide the URL to the Hive machine and your user credentials. You also have the option to pass MapReduce scripts to Hadoop. These scripts can be written in any programming language.

How to create a Hive data source

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select Hive Data Source from the list of data source types.

- 2 In Data Source Name, type a name for the data source.
- 3 Choose Next.
- 3 In New Hive Data Source Profile, specify the properties to connect to the Hive system.
 - 1 In Database URL, type the URL to the Hive system.
 - 2 In User Name and Password, type the user credentials to connect to the system.
 - 3 In Add File Statement, optionally type one or more Add File statements to add script files to the Hadoop distributed cache, as shown in the following example. Separate each Add File statement with a semicolon.

```
add file /usr/local/hive/rating_mapper.py; add file /usr/  
local/hive/weekday_mapper.py;
```

Figure 10-1 shows an example of properties to connect to a Hive system.

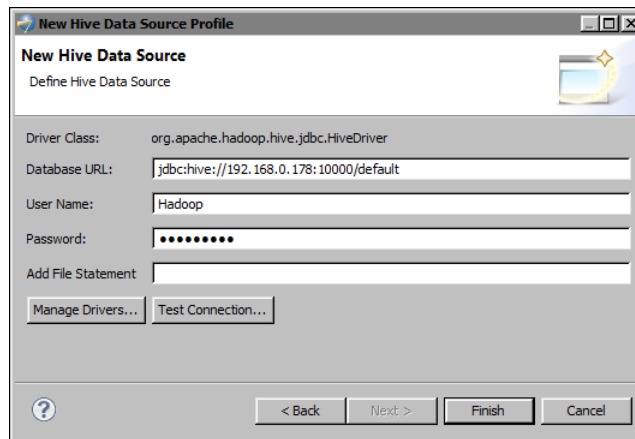


Figure 10-1 Connection properties for a Hive system

Specifying the data to retrieve from a Hadoop system

To specify what data rows to retrieve from a Hadoop system running Hive, you write a query using HQL. As mentioned earlier, HQL is similar to SQL. HQL supports many of the same keywords as SQL, for example, SELECT, WHERE, GROUP BY, ORDER BY, JOIN, and UNION.

Hive transforms HQL statements into MapReduce jobs that Hadoop uses to perform and manage parallel processing across the clusters of servers. You can embed your own MapReduce scripts in the query by using the TRANSFORM clause. You make these scripts available to Hadoop through the Add File

property when you configure the connection properties, as described in the previous section.

The following is an example of a HQL query that uses the TRANSFORM clause:

```
SELECT
    TRANSFORM (userid, movieid, rating, unixtime)
    USING 'python weekday_mapper.py'
    AS (userid, movieid, rating, weekday)
FROM u_data
```

How to specify what data to retrieve from a Hadoop system

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the Hive data source to use. Data Set Type displays HQL Select Query.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.
- 3 In HQL Query, in Query text, type a HQL statement that indicates what data to retrieve. Figure 10-2 shows an example of an HQL query specified in the data set editor.

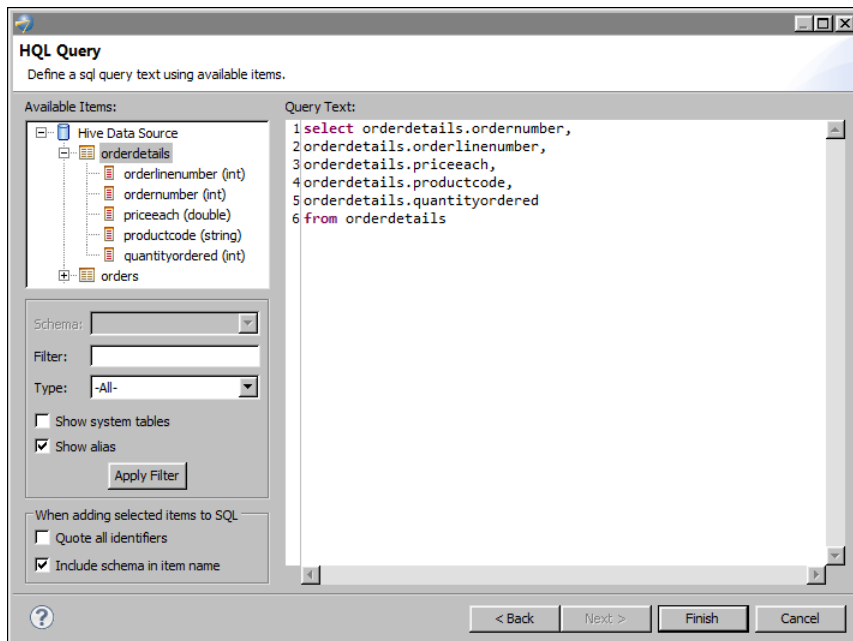


Figure 10-2 Data set editor displaying an HQL query

- 4 Choose Finish to save the data set. Edit Data Set displays the columns, and provides options for editing the data set, as shown in Figure 10-3.

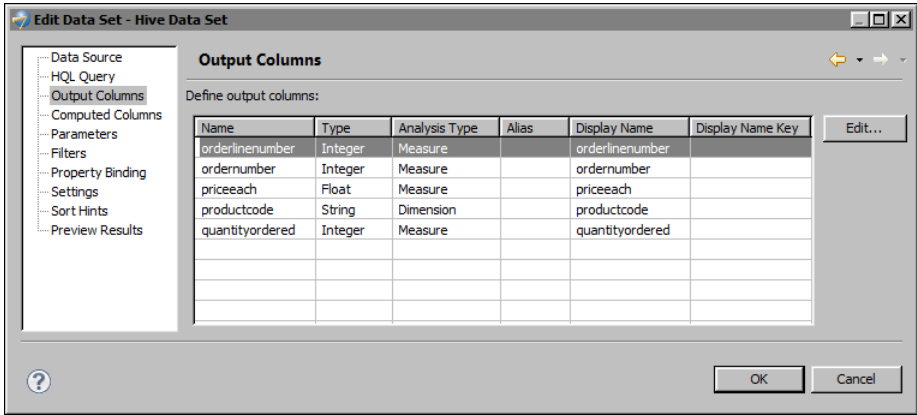


Figure 10-3 Data set editor displaying the output columns

- 5 Choose Preview Results to view the data rows returned by the data set.

11

Accessing data in Salesforce.com

This chapter contains the following topics:

- Using Salesforce.com data in a report
- Connecting to Salesforce.com
- Specifying the data to retrieve from Salesforce.com

Using Salesforce.com data in a report

Salesforce.com is a company specializing in software-as-a-service (SaaS), providing Customer Relationship Management (CRM) applications that run in the cloud. Organizations use these CRM applications to manage all aspects of their business activities with customers, including tracking the status of contracts and sales opportunities, accessing customer profiles and account histories, and communicating with decision makers.

Actuate BIRT Designer supports access to data in Salesforce.com, enabling you to integrate this business data in your reports. As with other types of data sources, for a report to use data from Salesforce.com, you must create the following BIRT objects:

- A data source that contains the information to connect to a database in Salesforce.com
- A data set that specifies the data to retrieve

Connecting to Salesforce.com

Actuate BIRT Designer uses a DataDirect JDBC driver to connect to Salesforce.com. This third-party driver supports access to Salesforce objects through JDBC and SQL. You provide the URL to connect to a Salesforce instance, and your login credentials. You can also set performance-tuning properties to control the data communications between BIRT and Salesforce.com.

How to create a Salesforce.com data source

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select Actuate JDBC Salesforce.com Data Source from the list of data source types.
 - 2 In Data Source Name, type a name for the data source.
 - 3 Choose Next.
- 3 In New Actuate JDBC Salesforce.com Data Source Profile, specify the properties to connect to a Salesforce instance, and optionally, change the performance-tuning settings.
 - 1 In Database URL, type the URL to a Salesforce instance.
 - 2 In User Name, type the user name to log in to the system.

- 3 In Password, type the user password and security token to log in to the system, for example, myPasswordXXXXXXXXXX, where myPassword is the password and XXXXXXXXXXXX is the security token. A user's security token is assigned by a Salesforce.com administrator. A user can change his or her security token in Salesforce.com's Personal Setup tool.
- 4 In Database Name, do one of the following:
 - ❑ Deselect Use default, then type a filename prefix, or a path and a prefix. The driver uses this value to create or locate the set of Salesforce embedded database files. For example, if Database Name is set to AcmeData, the database files that are created or loaded have the format, AcmeData.<file extension>. If you specify a path and a prefix, such as C:\Resources\Data\AcmeData, the driver creates or looks for database files AcmeData.<file extension> in the C:\Resources\Data folder.
 - ❑ Select Use default. This option uses BIRT's resource folder as the path and the User Name value as the filename prefix.
- 5 In Connection Retry Count, specify the number of times to attempt to connect until a successful connection is established.
- 6 In Connection Retry Delay, specify the number of seconds to wait between each connection attempt.
- 7 In Fetch Size, specify the number of data rows that the driver processes before returning data to the application. A small fetch size can improve the initial response time of the query. A large fetch size can improve overall fetch times at the cost of additional memory.
- 8 In Web Service Fetch Size, specify the number of data rows that the driver fetches for each JDBC call.
- 9 In Web Service Retry Count, specify the number of times the driver retries a SELECT query that has timed out.
- 10 In Web Service Timeout, specify the number of seconds that the driver waits for a response to a web service request.

Figure 11-1 shows an example of properties to connect to a Salesforce.com instance.

Figure 11-1 Connection properties to a Salesforce.com instance

Specifying the data to retrieve from Salesforce.com

Once the report connects to a Salesforce.com instance, you create a data set and write a SQL query to specify what data rows to retrieve. The driver translates the SQL query to a SOQL query before sending it to Salesforce.com for execution. SOQL (Salesforce Object Query Language) is Salesforce.com's query language for accessing data, and is similar to SQL. You cannot write a SOQL query in the data set editor.

How to specify what data to retrieve from a database in Salesforce.com

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the Actuate JDBC Salesforce.com data source to use. Data Set Type displays Select Query.
 - 2 In Data Set Name, type a name for the data set.

3 Choose Next.

In New Data Set, in Query Text, type a SQL statement that indicates what data to retrieve. Figure 11-2 shows an example of a query specified in the data set editor.

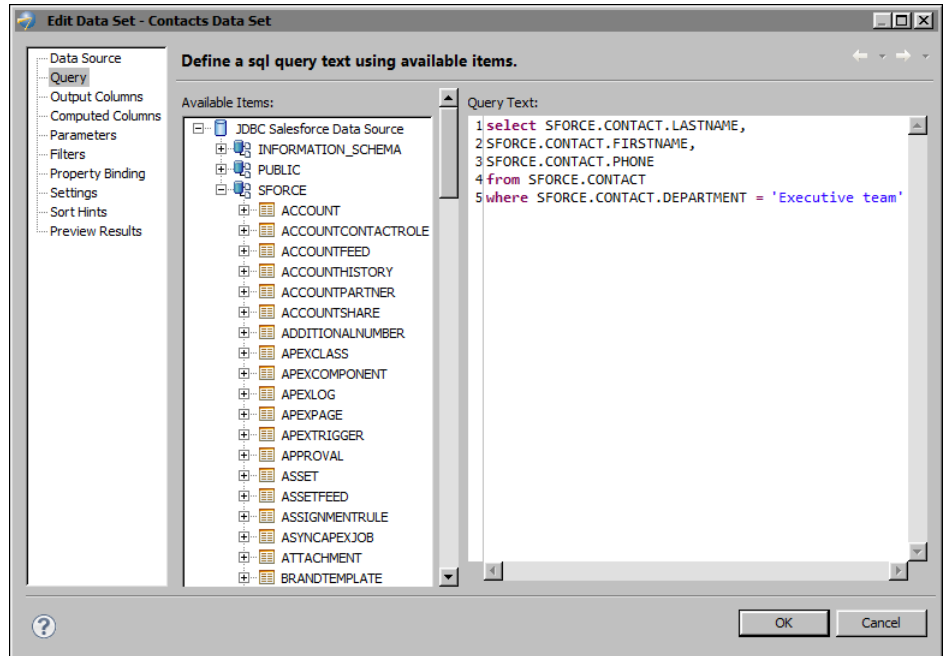


Figure 11-2 Data set editor displaying a SELECT query

- 3 Choose Finish to save the data set. Edit Data Set displays the columns, and provides options for editing the data set.
- 4 Choose Preview Results to view the data rows returned by the data set.

Accessing data in a POJO

This chapter contains the following topics:

- Using POJO data in a report
- Connecting to a POJO
- Specifying the data to retrieve from a POJO

Using POJO data in a report

Plain Old Java Objects (POJOs) are simple Java objects that do not implement framework-specific interfaces such as those defined by the EJB framework. Java developers use POJOs to separate an application's business logic from infrastructure frameworks, which constantly evolve. POJOs are frequently used for data persistence—the storage and retrieval of data—in Java applications.

Actuate BIRT Designer supports the use of POJOs as a data source for reports. As with other types of data sources, such as databases, XML files, and web services, for a report to use data from a POJO, you must create the following BIRT objects:

- A POJO data source that contains the information to connect to a POJO
- A POJO data set that defines the data that is available to a report

No programming is required to create these BIRT objects. However, if using POJOs created by another developer, a basic understanding of what the classes do and the data they provide is necessary. A simple POJO example typically consists of the following classes:

- A class that describes the data object, for example, a books class that describes the properties of books, including book title, author, publisher, year published, and so on.
- A class that specifies how to retrieve data. For example, such a class can retrieve data about each book by using the Java interface, `Iterator`, and implementing the `open()`, `next()`, and `close()` methods to iterate through all the book objects.

Connecting to a POJO

When creating a POJO data source in a BIRT report to connect to a POJO, you specify the location of the JAR file that contains the POJO classes. You can specify either a relative or absolute path.

How to create a POJO data source

- 1 In Data Explorer, right-click Data Sources, then choose New Data Source.
- 2 In New Data Source, specify the following information:
 - 1 Select Actuate POJO Data Source from the list of data source types, as shown in Figure 12-1.
 - 2 In Data Source Name, type a name for the data source.

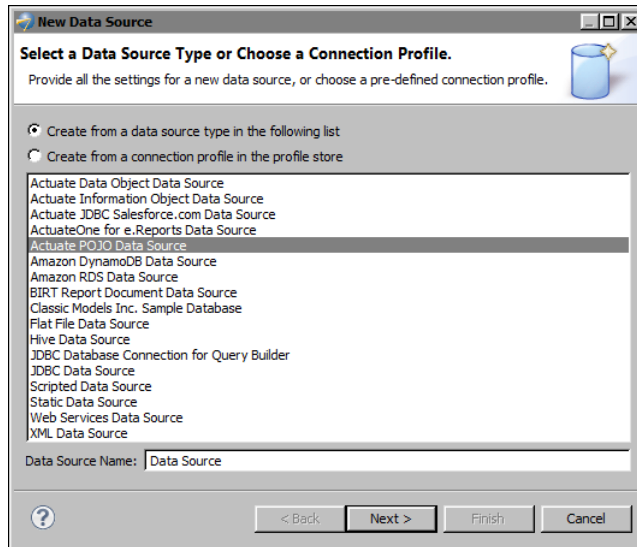


Figure 12-1 Selecting POJO as a data source type

3 Choose Next.

3 In New POJO Data Source Profile, shown in Figure 12-2, specify the properties to connect to the POJO.

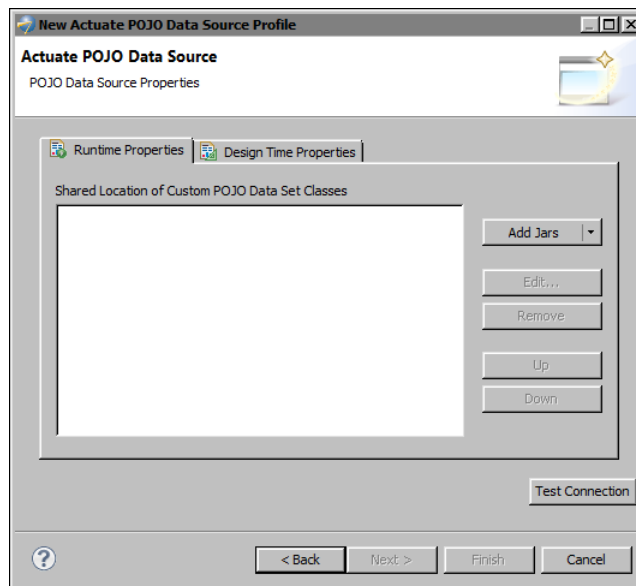


Figure 12-2 POJO data source properties

- 1 In Runtime Properties, specify the location of the POJO classes that define the run time properties of the data source. Click the arrow icon next to Add Jars, then select either Relative path or Absolute path.

- ❑ Select Relative path to specify a path that is relative to the folder designated as the resource folder. By default, BIRT uses the current project folder as the resource folder.

In Select Jars/Zips, which displays the contents of the resource folder, as shown in Figure 12-3, select the JAR file, then choose OK.

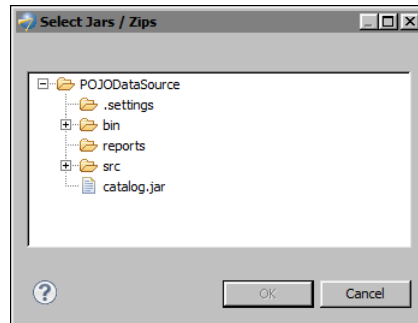


Figure 12-3 Select Jars/Zips displaying the contents of the resource folder

- ❑ Select Absolute path to specify the full path in the file system. Browse the file system and select the JAR file, then choose OK.
- 2 In Design Time Properties, specify the location of the POJO classes that define the design time properties of the data source. The data set editor uses this information to list the get methods, which you select to define the column mappings for the POJO data set. Use the instructions in the previous step to specify either a relative path or absolute path to the POJO classes.
 - 4 Choose Test Connection to ensure that the connection information is correct. If Test Connection returns an error, repeat the preceding steps to correct the error.
 - 5 Choose Finish. The new POJO data source appears under Data Sources in Data Explorer.

Specifying the data to retrieve from a POJO

BIRT reports must use data that is structured as a table consisting of rows and columns. For a POJO data set to return data in this format, you map methods or members of a POJO class to columns. Listing 12-1 shows an example of a class that represents music CDs. The class describes the members and uses pairs of get

and set methods to persist the data. To create a data set using this class, you would map the get methods to columns.

Listing 12-1 Class representing music CDs

```
package dataset;
public class CD {

    private String cdTitle;
    private String cdArtist;
    private String cdCountry;
    private String cdCompany;
    private String cdPrice;
    private String cdYear;

    public CD(String title) {
        this.cdTitle = title;
    }
    public String getCDTitle() {
        return cdTitle;
    }
    public void setCDTitle(String title) {
        this.cdTitle = title;
    }
    public String getCDArtist() {
        return cdArtist;
    }
    public void setCDArtist(String artist) {
        this.cdArtist = artist;
    }
    public String getCDCountry() {
        return cdCountry;
    }
    public void setCDCountry(String country) {
        this.cdCountry = country;
    }
    public String getCDCompany() {
        return cdCompany;
    }
    public void setCDCompany(String company) {
        this.cdCompany = company;
    }
    public String getCDPrice() {
        return cdPrice;
    }
}
```

```

public void setCDPrice(String price) {
    this.cdPrice = price;
}
public String getCDYear() {
    return cdYear;
}
public void setCDYear(String year) {
    this.cdYear = year;
}
}

```

How to create a POJO data set

This procedure assumes you have already created the POJO data source that this data set uses. Examples in this section refer to the POJO example in Listing 12-1.

- 1 In Data Explorer, right-click Data Sets, then choose New Data Set.
- 2 In New Data Set, specify the following information:
 - 1 In Data Source Selection, select the POJO data source to use. Data Set Type displays Actuate POJO Data Set.
 - 2 In Data Set Name, type a name for the data set.
 - 3 Choose Next.
- 3 In New Actuate POJO Data Set, specify the following information:
 - 1 In POJO Data Set Class Name, specify the POJO class that retrieves the data at run time. Choose Browse to find and select the class.
 - 2 In Application Context Key, use the default key or delete it. This property is optional.

Figure 12-4 shows an example of properties set for a POJO data set.

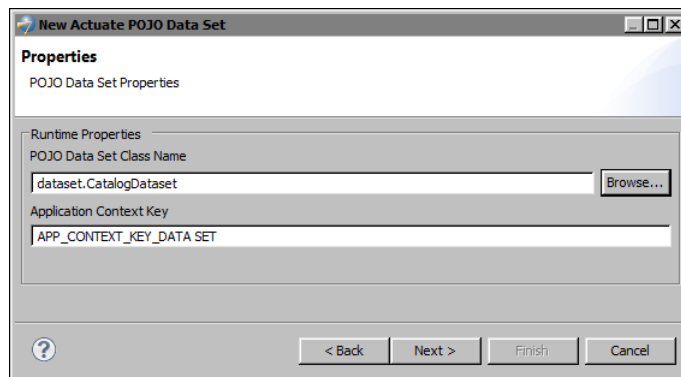


Figure 12-4 POJO data set properties

- 4 Choose Next.
- 5 Map methods or fields in a POJO class to data set columns, using the following steps:
 - 1 In POJO Class Name, specify the POJO class that contains the get methods to map to columns. You can choose Browse to find and select the class.

The data set editor uses a get* filter to display all the get methods in the specified POJO class, as shown in Figure 12-5.

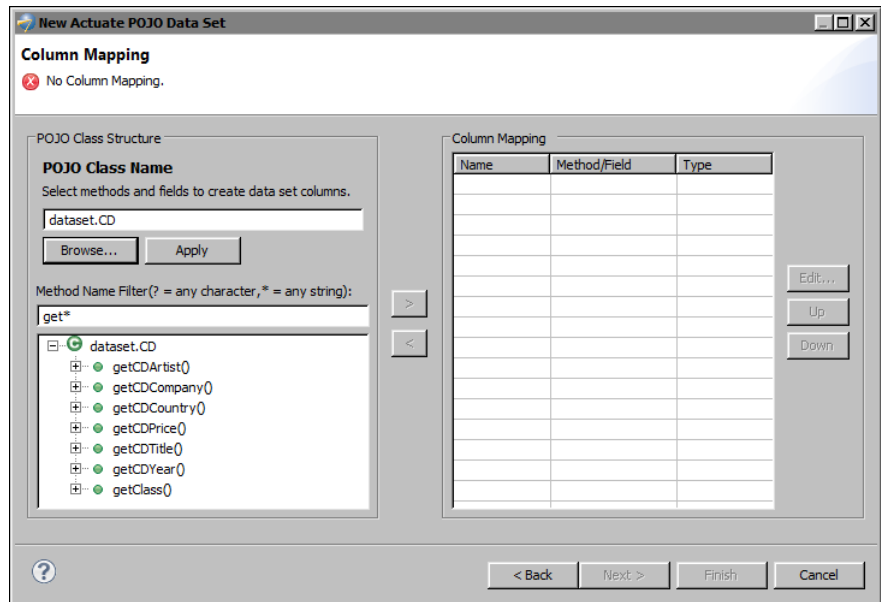


Figure 12-5 Data set editor displaying the get methods in a POJO class

- 2 Double-click the get method to map to a data set column.

Add Column Mapping displays the mapping information, as shown in Figure 12-6.

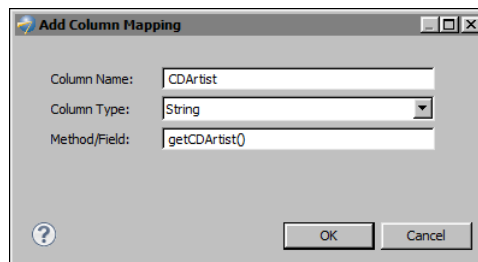


Figure 12-6 Column mapping information

Choose OK to accept the default values.

- 3 Repeat the previous step for every column to add to the data set.
Figure 12-7 shows an example of column mappings defined in a POJO data set.

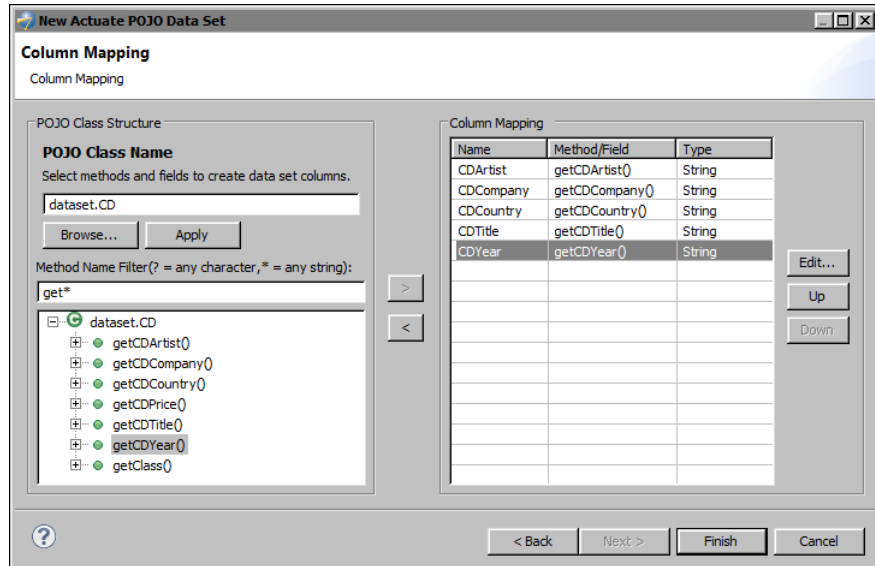


Figure 12-7 Data set editor displaying the column mappings

- 6 Choose Finish to save the data set. Edit Data Set displays the columns, and provides options for editing the data set.
- 7 Choose Preview Results to view the data rows returned by the data set.
Figure 12-8 shows an example of data rows returned by a POJO data set.

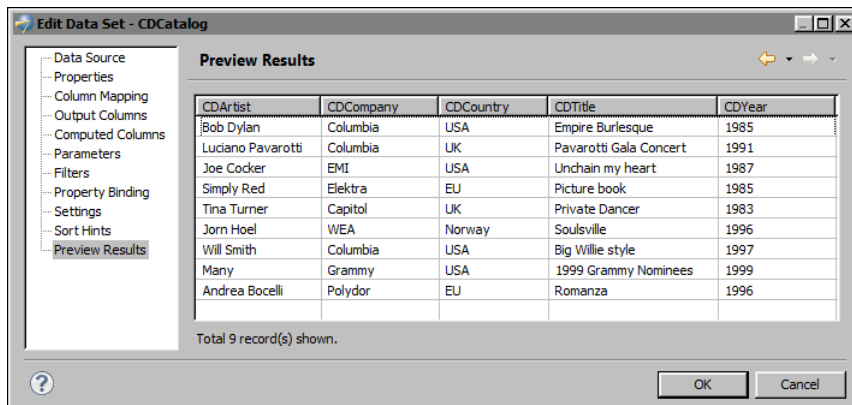


Figure 12-8 Data rows returned by a POJO data set

Combining data from multiple data sources

This chapter contains the following topics:

- Ways to combine data
- Creating a union data set
- Creating a joined data set

Ways to combine data

Sometimes, the data that a report requires originates in several data sources. For example, an application system generates monthly transaction data and the data for each month is saved in a separate CSV file, or a system saves data in different formats, such as XML and CSV.

Actuate BIRT Designer provides two options for combining data from multiple sources. You can create a union data set or a joined data set. The option you choose depends on the data structures and the results you want. Both options entail combining data sets, so before creating a union data set or a joined data set, you first create the individual data sets. For example, to combine data from an XML file with data from a CSV file, you must first create the XML data set and the flat file data set.

Creating a union data set

A union data set combines the results returned by two or more data sets. Creating a union data set is similar to using a SQL UNION ALL statement, which combines the result sets of two or more SELECT statements into a single result set.

Create a union data set to consolidate data from multiple sources that have similar data structures. For example, a company maintains separate database tables to store contact information about employees and contractors. The structure of the tables are similar. Both contain Name and Phone fields. Suppose you want to create a master contact list for all employees and contractors. The solution is to create one data set to retrieve employee data, a second data set to retrieve contractor data, and a union data set that combines data from the previous data sets.

Figure 13-1 illustrates the data sets that return employee and contractor data.

Employees data set			Contractors data set	
Name	Phone	E-mail	Name	Phone
Mark Smith	650-343-2232	msmith@acme.com	Sarah Brown	650-545-3645
Patrick Mason	650-343-1234	mason@acme.com	Sean Calahan	415-242-8254
Soo-Kim Yoon	650-343-5678	skyoon@acme.com	Paula Mitchell	650-662-9735
Maria Gomez	650-343-9876	gomez@acme.com	Michael Lim	408-234-2645

Figure 13-1 Data sets with common fields returning employee and contractor data

When creating a union data set, you select the fields to include. Figure 13-2 shows a union data set that includes all the fields from both Employees and Contractors

data sets. The Name field contains all employee and contractor names. The Phone field also contains all employee and contractor phone numbers. The E-mail field exists only in the employee data set, so only employee data rows have e-mail data.

Union data set

Name	Phone	E-mail
Mark Smith	650-343-2232	msmith@acme.com
Patrick Mason	650-343-1234	mason@acme.com
Soo-Kim Yoon	650-343-5678	skyoon@acme.com
Maria Gomez	650-343-9876	gomez@acme.com
Sarah Brown	650-545-3645	
Sean Calahan	415-242-8254	
Paula Mitchell	650-662-9735	
Michael Lim	408-234-2645	

Figure 13-2 Union data set that combines all data from Employees data set and Contractors data set

Figure 13-3 shows a union data set that includes only the common fields, Name and Phone, from the Employees and Contractors data sets.

Union data set

Name	Phone
Mark Smith	650-343-2232
Patrick Mason	650-343-1234
Soo-Kim Yoon	650-343-5678
Maria Gomez	650-343-9876
Sarah Brown	650-545-3645
Sean Calahan	415-242-8254
Paula Mitchell	650-662-9735
Michael Lim	408-234-2645

Figure 13-3 Union data set that combines data from common fields in Employees data set and Contractors data set

In the previous example, the two data sets used to create a union data set contained common fields with the same names. This condition is required for consolidating data into a single field. However, data sources often use different field names.

Suppose the Name field in the Employees and Contractors tables is EmployeeName and ContractorName, respectively. To create a union data set that consolidates employee and contractor names in a single field, rename the field names in the individual data sets to use the same name. When creating the

Employees data set, in Output Columns, use the Alias property to give the EmployeeName field another name. Figure 13-4 shows the EmployeeName field with the alias, Name.

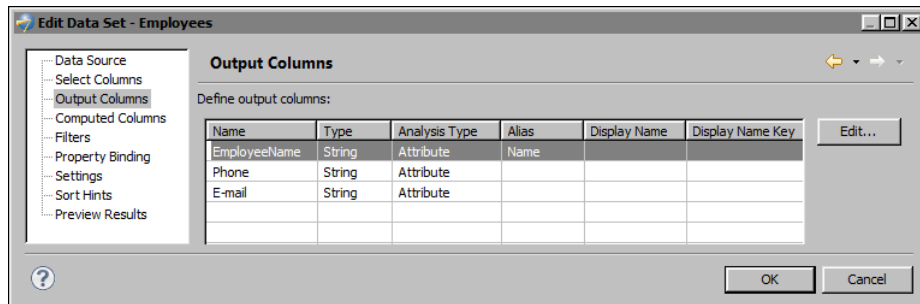


Figure 13-4 Alias specified for the EmployeeName field

Similarly, when creating the Contractors data set, edit the ContractorName field to use the same alias.

How to create a union data set

This procedure assumes that you have created the data sets to be included in the union data set.

- 1 In Data Explorer, right-click Data Sets, and choose Union Data Set.
- 2 In New Data Set, in Data Set Name, optionally type a name for the union data set.
- 3 Choose New.
- 4 In New Union Element, in Select Data Set, select the first data set that contains the data to include in the union data set.

New Union Element displays the fields in the selected data set, as shown in Figure 13-5.

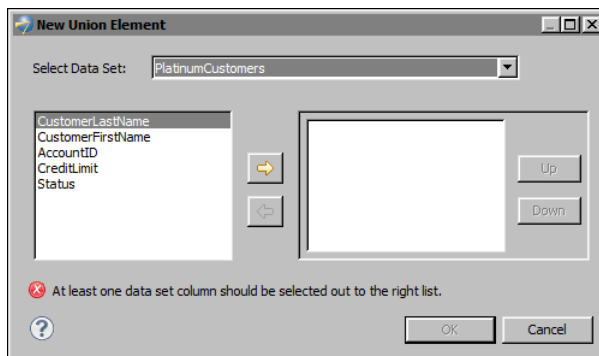


Figure 13-5 Fields in a data set selected for a union data set

- 5 Select the fields to include in the union data set, then choose OK.
- 6 Repeat steps 3 to 5 to add the next data set to the union data set.

Figure 13-6 shows a union data set named MasterCustomerList that consists of fields from two data sets, PlatinumCustomers and GoldCustomers.

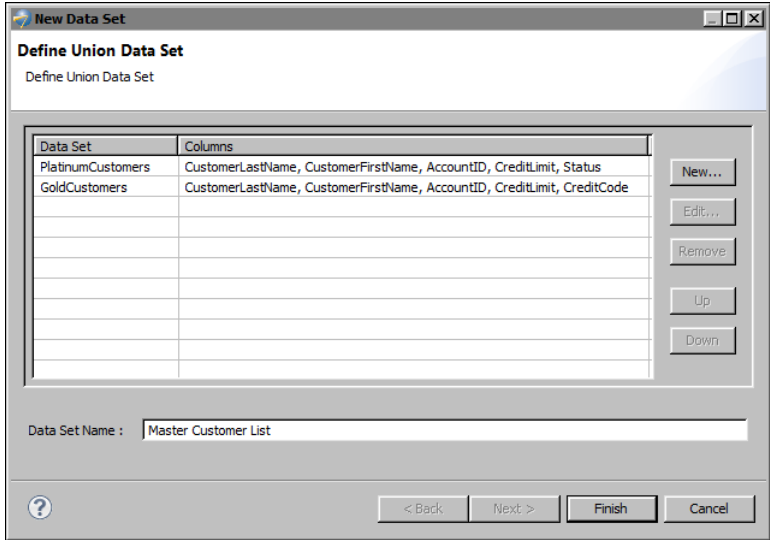


Figure 13-6 Definition of a union data set that combines two data sets

- 7 Choose Finish. Edit Data Set displays the selected fields, and provides options for editing the data set.
- 8 Choose Preview Results. Figure 13-7 shows the rows returned by the Master Customer List union data set.

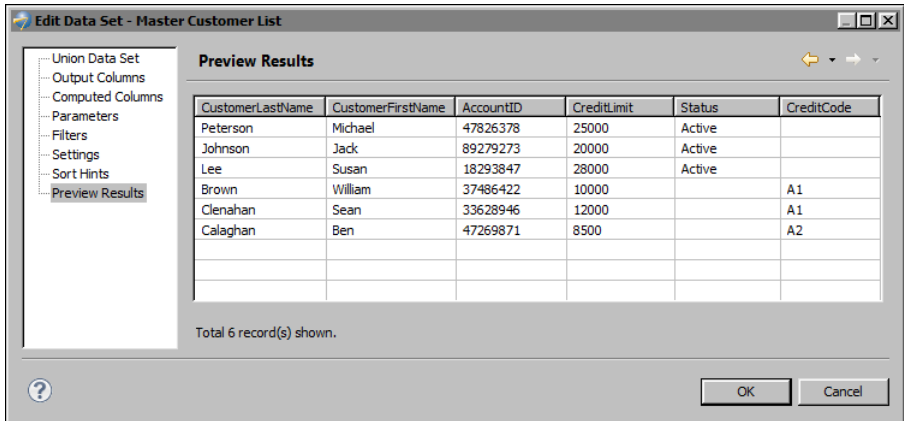


Figure 13-7 Data rows returned by the union data set

Creating a joined data set

A joined data set combines the results of two or more data sets that are related through a common key. Creating a joined data set is similar to joining tables in a database using a SQL JOIN clause. Use a joined data set to combine data from different data sources in which a relationship exists, as shown in the following example.

Figure 13-8 illustrates data sets that return data about customers and orders. The data sets are related through the CustomerID field. You can retrieve order information for each customer by joining the data sets.

Customers data set

CustomerName	CustomerID
Sarah Brown	1001
Sean Calahan	1002
Paula Mitchell	1003
Michael Lim	1004

Orders data set

OrderID	Amount	CustomerID
110	1500.55	1003
115	12520.00	1001
120	8450.50	1004
125	7550.00	1002

Figure 13-8 Data sets with a common field returning customer and order data

Figure 13-9 shows the results of joining the customers and orders data sets on the CustomerID key, and displaying only the CustomerName and Amount fields in the joined data set.

CustomerName	Amount
Sarah Brown	12520.00
Sean Calahan	7550.00
Paula Mitchell	1500.55
Michael Lim	8450.50

Figure 13-9 Data rows returned when the customers and orders data sets are joined

Actuate BIRT Designer supports the functionality of joined data sets available in the open-source version, and provides the following additional features in an updated user interface:

- The capability to join more than two data sets
- The capability to join on more than one key
- Support for new join operators: <>, <, >, <=, >=
- Support for a new type of join, the side-by-side join

Unlike the other types of supported joins (inner, left outer, right outer, and full outer), the side-by-side join links data sets without requiring a key. The resulting

joined data set displays the selected fields side by side. Figure 13-10 shows two data sets that do not share a common field. The first data set returns customer data, and the second data set returns order data.

Customers data set		Orders data set	
CustomerName	CustomerID	OrderID	Amount
Sarah Brown	1001	110	1500.55
Sean Calahan	1002	115	12520.00
Paula Mitchell	1003	120	8450.50
Michael Lim	1004	125	7550.00

Figure 13-10 Data sets without a common field

Figure 13-11 shows the results of joining the customers and orders data sets using the side-by-side join. When using this type of join, do not misinterpret the results. As Figure 13-11 shows, the data from the two data sets appear side by side, implying that each customer has a relationship with an order when, in fact, no such relationship exists.

CustomerName	CustomerID	OrderID	Amount
Sarah Brown	1001	110	1500.55
Sean Calahan	1002	115	12520.00
Paula Mitchell	1003	120	8450.50
Michael Lim	1004	125	7550.00

Figure 13-11 Results of a side-by-side join

For information about the other types of supported joins, see *BIRT: A Field Guide*.

How to create a joined data set

This procedure assumes that you have created the data sets to be included in the joined data set.

- 1 In Data Explorer, right-click Data Sets, and choose Join Data Set.
- 2 In New Data Set, in Data Set Name, optionally type a name for the joined data set.
- 3 Specify the data sets to use in the joined data set. Under Available data sets, drag each data set to the editing area. Figure 13-12 shows three data sets in the editing area.

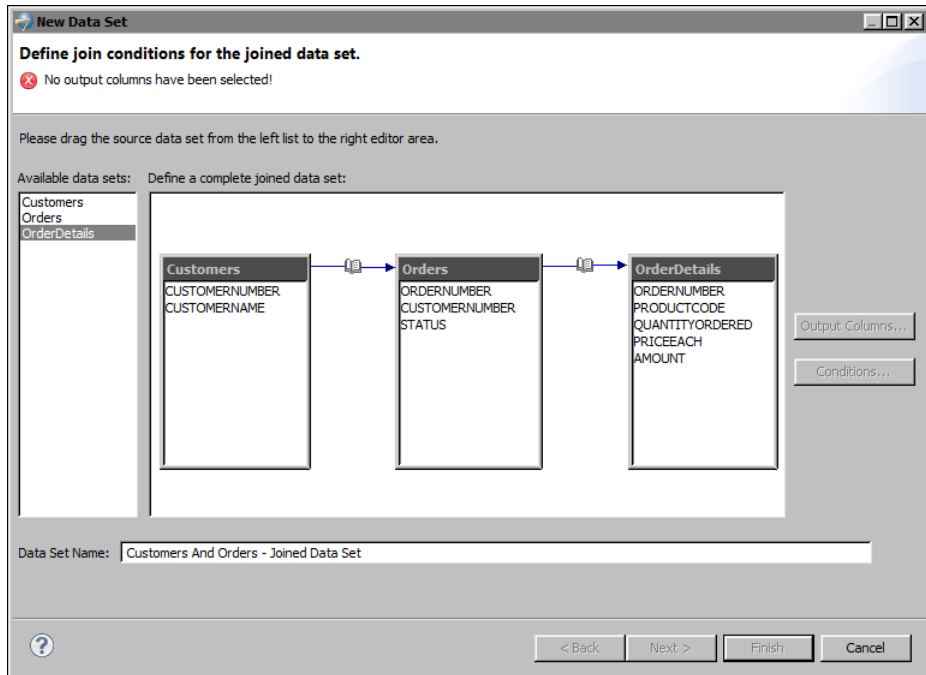


Figure 13-12 Three data sets selected for a joined data set

- 4 Specify the fields from each data set to include in the joined data set. Perform the following tasks for each data set:
 - 1 Select a data set by clicking anywhere in the image of the data set. Do not, however, click on a field name.
 - 2 Choose Output Columns.
 - 3 In Edit Data Set Properties, under Select output columns, select the desired data set fields, then choose OK.
- 5 Specify the conditions for joining the data sets. Perform the following tasks for each pair of data sets. In the example shown in Figure 13-12, specify a condition for joining the first and second data sets, and a condition for joining the second and third data sets.
 - 1 Select the arrow between two data sets.
 - 2 Choose Conditions.
 - 3 In Define join type and join conditions, specify the following information:
 - 1 In Join Type, select the type of join to use.
 - 2 If you select a join type other than Side-By-Side, define a join condition.

- ❑ Choose New.
- ❑ Select the fields on which to join, and select a operator that specifies how to compare the values in the fields being joined. Figure 13-13 shows a join condition that combines data when the CUSTOMERNUMBER value in the Customers data set is equal to the CUSTOMERNUMBER value in the Orders data set.

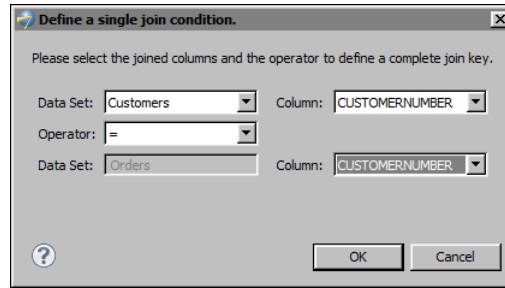


Figure 13-13 Joining data sets on a common field

- ❑ Choose OK.

The Define join type and join conditions dialog displays the specified condition, as shown in Figure 13-14.

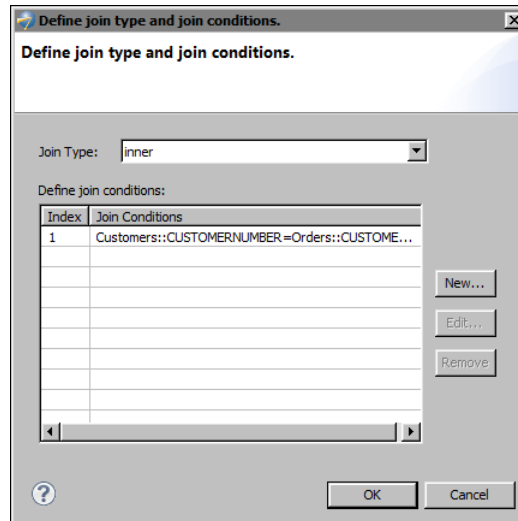


Figure 13-14 Definition of an inner join

- 4 Choose OK.
- 6 Choose Finish to save the joined data set.

Joining on more than one key

You can specify more than one join condition when joining two data sets. For example, you can join a customers data set with a sales offices data set, shown in Figure 13-15, to find the names of customers and sales managers that are located in the same city and state.

Customers data set

Name	City	State
Mark Smith	San Francisco	California
Patrick Mason	Los Angeles	California
Paula West	New York	New York
Joanne Kim	San Diego	California

Sales Offices data set

City	State	SalesMgr
Los Angeles	California	Robert Diaz
New York	New York	Monica Blair
San Francisco	California	Susan Kline

Figure 13-15 Data sets with two common fields, City and State

You would create the following join conditions:

- The first condition, shown in Figure 13-16, compares the State values in the Customer and SalesOffices data sets and looks for a match.

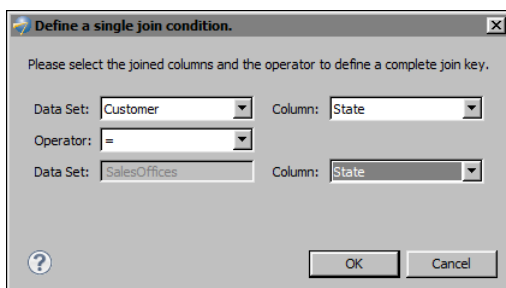


Figure 13-16 Joining on a State field

- The second condition, shown in Figure 13-17, compares the City values in both data sets and looks for a match.

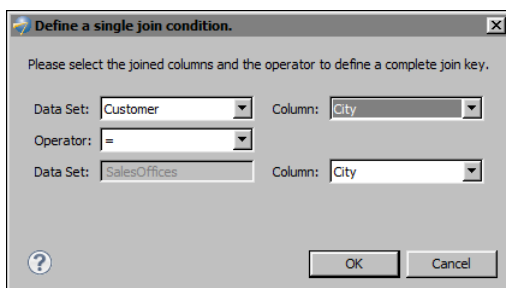


Figure 13-17 Joining on a City field

The joined data set returns the results shown in Figure 13-18, if the join type is fullOuter.

Figure 13-18 Data rows returned by the joined data set

Specifying a join condition not based on equality

The condition for joining values in two fields is usually based on equality (=), as shown in all the examples so far. Less common are join conditions that use any of the other comparison operators: not equal (<>), greater than (>), less than (<), greater than or equal to (>=), and less than or equal to (<=).

The following example shows the use of joins that are not based on equality. In the example, a Sales data set is joined with a Commissions data set. The joined data set uses a >= join and a < join to look up the commissions to pay to sales managers, based on their sales totals and management levels.

Figure 13-19 shows the Sales and Commissions data sets. In the Commissions data set, each level has four commission rates. For level 1, a commission rate of 25% is paid if a sales total is between 75000 and 100000, 20% is paid if a sales total is between 50000 and 75000, and so on.

Sales data set

SalesMgr	Level	TotalSales
Susan Kline	1	55000
Robert Diaz	2	45000
Monica Blair	2	28000
Sean Calahan	1	23000

Commissions data set

Level	LowRange	HighRange	Commission
1	75000	100000	25
1	50000	75000	20
1	25000	50000	15
1	15000	25000	10
2	70000	100000	25
2	45000	70000	20
2	20000	45000	15
2	10000	20000	10

Figure 13-19 Data sets returning sales and commission rates data

The following join conditions specify the fields on which to join and how to compare the values in the fields being joined:

- The first condition, shown in Figure 13-20, compares the Level values in the Sales and Commissions data sets and looks for a match.

Define a single join condition.

Please select the joined columns and the operator to define a complete join key.

Data Set: Sales Column: Level

Operator: =

Data Set: Commissions Column: Level

? OK Cancel

Figure 13-20 Joining on the Level field and looking for a match

- The second condition, shown in Figure 13-21, uses the >= operator to compare the TotalSales values in the Sales data set with the LowRange values in the Commissions data set.

Define a single join condition.

Please select the joined columns and the operator to define a complete join key.

Data Set: Sales Column: TotalSales

Operator: >=

Data Set: Commissions Column: LowRange

? OK Cancel

Figure 13-21 Joining on TotalSales and LowRange fields using the >= operator

- The third condition, shown in Figure 13-22, uses the < operator to compare the TotalSales values in the Sales data set with the HighRange values in the Commissions data set.

Define a single join condition.

Please select the joined columns and the operator to define a complete join key.

Data Set: Sales Column: TotalSales

Operator: <

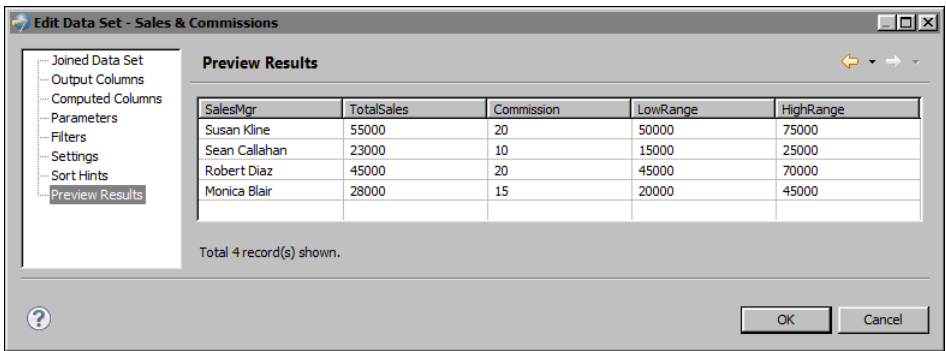
Data Set: Commissions Column: HighRange

? OK Cancel

Figure 13-22 Joining on TotalSales and HighRange fields using the < operator

The second and third join conditions check if a sales total is greater than or equal to LowRange and less than HighRange.

The joined data set returns the results shown in Figure 13-23.



The screenshot shows a software window titled "Edit Data Set - Sales & Commissions". On the left is a sidebar with a tree view containing: "Joined Data Set", "Output Columns", "Computed Columns", "Parameters", "Filters", "Settings", "Sort Hints", and "Preview Results" (which is selected). The main area is titled "Preview Results" and contains a table with 5 columns: "SalesMgr", "TotalSales", "Commission", "LowRange", and "HighRange". The table has 4 data rows. Below the table, it says "Total 4 record(s) shown." At the bottom right are "OK" and "Cancel" buttons. A help icon (?) is at the bottom left.

SalesMgr	TotalSales	Commission	LowRange	HighRange
Susan Kline	55000	20	50000	75000
Sean Callahan	23000	10	15000	25000
Robert Diaz	45000	20	45000	70000
Monica Blair	28000	15	20000	45000

Figure 13-23 Data rows returned by the joined data set

Part Two

Designing reports

Formatting a report

This chapter contains the following topics:

- Formatting features in Actuate BIRT Designer
- Removing the default themes
- Hiding columns in a table
- Using a Quick Response (QR) code to link to content
- Designing for optimal viewer performance

Formatting features in Actuate BIRT Designer

Actuate BIRT Designer supports all the formatting features available in the open-source version, and provides additional features. The reports you create using Actuate BIRT Designer are typically published to the Actuate BIRT iServer, where they can be viewed in Interactive Viewer, opened in BIRT Studio, added to a dashboard, or made available to mobile devices. Often, when designing a report, you consider how the report is viewed and used by these applications.

This chapter describes the additional report formatting options in Actuate BIRT Designer. For information about other formatting options, see *BIRT: A Field Guide*. This chapter also describes the design issues to consider when designing reports that users view in the web viewer.

Removing the default themes

By default, new reports that you create use a set of themes that apply formatting to charts, gadgets, tables, and cross tabs. Figure 14-1 shows a table with the default formats.

Products.rptdesign

Refresh Report

Note: Current maximum number of data rows is limited to 0. ([Click to change Preview Preferences](#))

	PRODUCT	VENDOR	MSRP
Classic Cars	1952 Alpine Renault 1300	Classic Metal Creations	214.3
	1972 Alfa Romeo GTA	Motor City Art Classics	136
	1962 LanciaA Delta 16V	Second Gear Diecast	147.74
	1968 Ford Mustang	Autoart Studio Design	194.57
	2001 Ferrari Enzo	Second Gear Diecast	207.8
	1969 Corvair Monza	Welly Diecast Productions	151.08
	1968 Dodge Charger	Welly Diecast Productions	117.44
	1969 Ford Falcon	Second Gear Diecast	173.02
	1970 Plymouth Hemi Cuda	Studio M Art Models	79.8
	1969 Dodge Charger	Welly Diecast Productions	115.16
	1993 Mazda RX-7	Highway 66 Mini Classics	141.54

LayoutMaster PageScriptXML SourcePreviewDesktop Viewer (prototype)

Figure 14-1 Table with the default formats

The themes are defined in a library, ThemesReportItems.rptlibrary, which is added to every new report.

To apply your own themes or styles in a report, disable the default themes by doing one of the following:

- When creating a new report, in the second dialog of the New Report wizard, deselect Include the default themes. Figure 14-2 shows this option selected, which is the default.

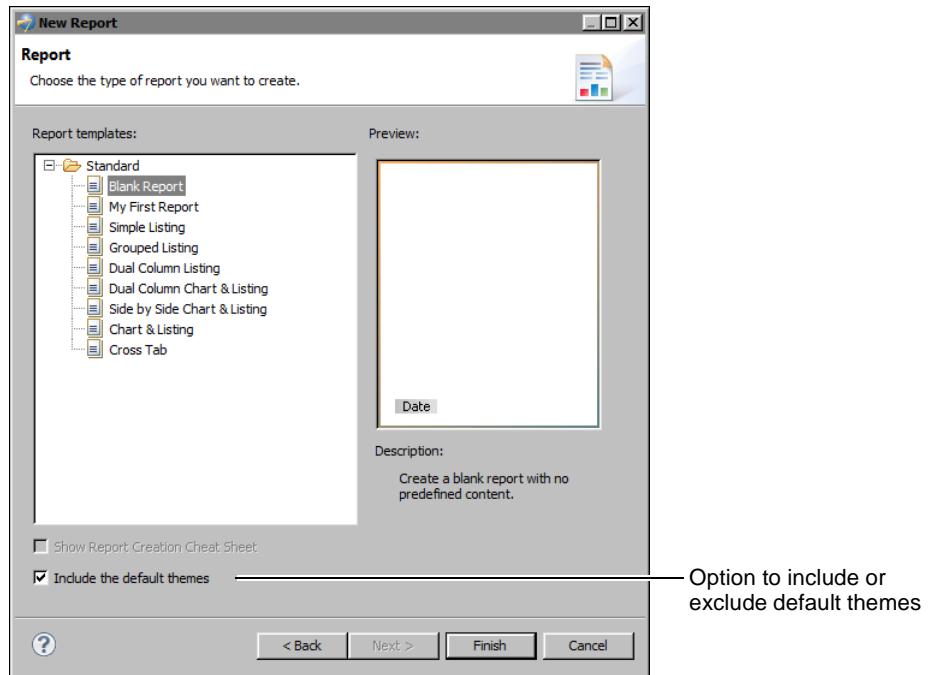


Figure 14-2 Include the default themes selected by default

- If a report already includes the default themes, in the Outline view, expand Libraries, then right-click ThemesReportItems and choose Remove Library, as shown in Figure 14-3.

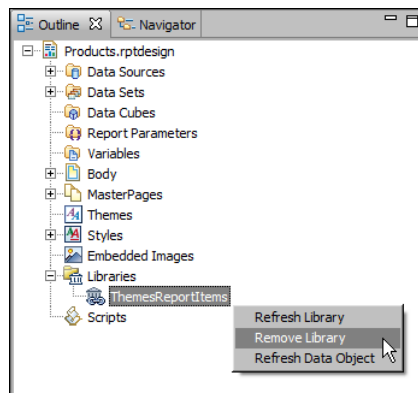


Figure 14-3 Removing ThemesReportItems.rptlibrary from a report

The previous procedures remove all the default themes from a report. You can, however, choose to remove themes from specific report elements while maintaining default themes for other report elements. Figure 14-4 shows an

example of removing a default theme, ThemesReportItems.default-table, from a table by setting the Theme property to None.

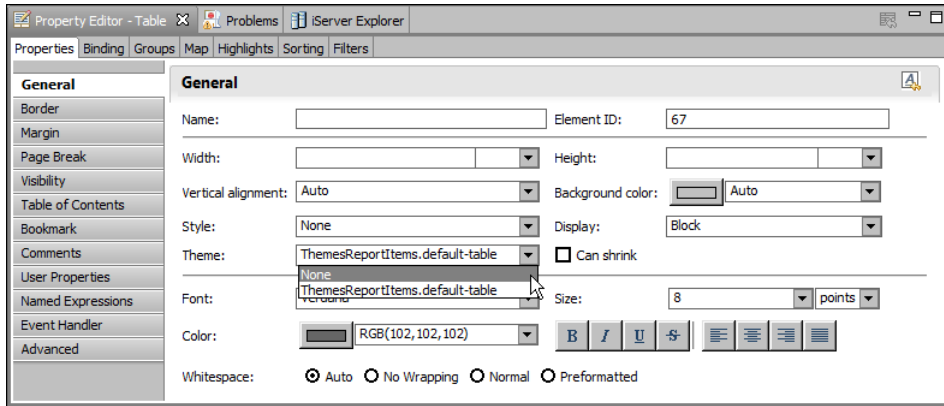


Figure 14-4 Setting a table's Theme property to None

Hiding columns in a table

There are two ways to hide a column in a table. You can:

- Set the column's Display property to No Display.
- Set the column's Visibility property to Hide.

Use the Display property if you are designing a report for Interactive Viewer and you want to hide one or more columns when the report is first displayed in Interactive Viewer. Users viewing the report can then choose to show the hidden columns. The Display property is available under Advanced properties in Property Editor, as shown in Figure 14-5.

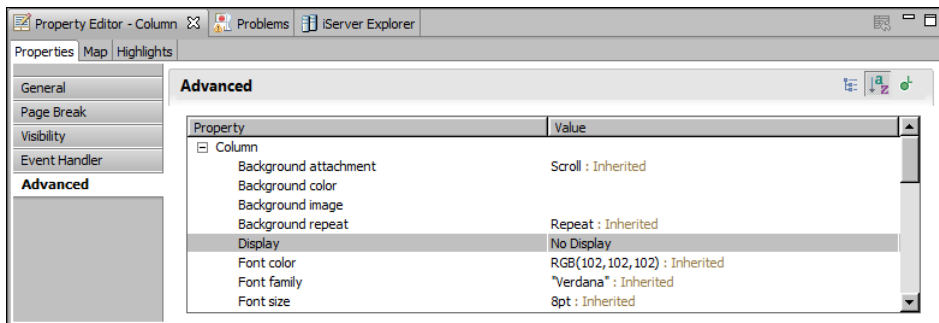


Figure 14-5 Display property of a table column set to No Display

Use the Visibility property to hide a column based on the output format or on a specific condition. For example, you can hide a column in all formats except PDF, or hide a column if it contains no values. The Visibility property is available under Properties in the Property Editor, as shown in Figure 14-6.

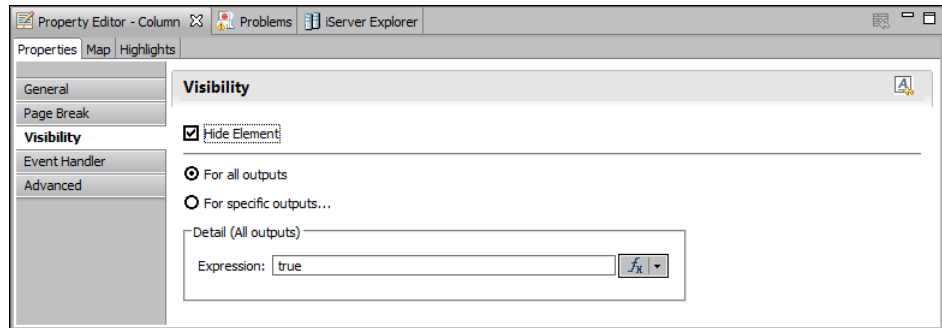


Figure 14-6 Visibility property of a table column set to Hide Element

In releases prior to 11SP1, columns hidden by the Visibility property were available for display in the Interactive Viewer. In releases 11SP1 and later, they are not. Reports created in a release prior to 11SP1 and which used the Visibility property to hide or display a column now exhibit different behavior in Interactive Viewer. To restore the original behavior, change the report to use the Display property instead of the Visibility property.

Using a Quick Response (QR) code to link to content

A QR code is a type of two-dimensional barcode that contains encoded information. Figure 14-7 shows an example of a QR code.



Figure 14-7 A QR code

QR codes are used by a wide range of applications targeted to mobile-phone users. QR codes can store URLs, business card information, or any kind of text. Use a QR code in a report to provide contact information or links to other reports. Mobile-phone users who have a QR code reader on their phone can scan the image of a QR code to display the contact information or open a report.

Actuate BIRT Designer includes a QR code generator, ZXing, for generating QR codes. To insert a QR code in a report, insert an image element to display the QR code. In the image's onCreate or onRender event, write code to dynamically

create the QR code. Listing 14-1 shows a code example that creates a QR code that when scanned opens a report, qrreport.rptdesign, on an Actuate BIRT iServer.

Listing 14-1 Code to create a QR code that opens a report

```
var size = 350; // image width and height in pixels
var bgnd = new Packages.java.awt.Color(1.0, 1.0, 1.0); // white
    background
var fgnd = new Packages.java.awt.Color(0, 0, 0); // black
    foreground

// Report URL to encode.
var message = "http://athena:8910/iportal/
    executereport.do?__executablename=/
    qrreport.rptdesign&invokeSubmit=true;"

var writer = new Packages.com.google.zxing.qrcode.QRCodeWriter();
var matrix = writer.encode(message,
    Packages.com.google.zxing.BarcodeFormat.QR_CODE, size, size);

var bi = new Packages.java.awt.image.BufferedImage(size, size,
    Packages.java.awt.image.BufferedImage.TYPE_INT_RGB);
var g = bi.getGraphics();
g.setColor(bgnd);
g.fillRect(0,0,size,size);
g.setColor(fgnd);
for (var y = 0; y < size; y++) {
    for (var x = 0; x < size; x++) {
        if (matrix.get(x, y)) {
            g.fillRect(x, y, 1, 1);
        }
    }
}

baos = new Packages.java.io.ByteArrayOutputStream();
Packages.java.awt.imageio.ImageIO.write(bi, "png", baos);
```

QR codes support up to 4,296 characters. The higher the number of characters, the higher the resolution of the QR code. Note, however, that low-resolution mobile phone cameras might not be able to read high-resolution codes.

Designing for optimal viewer performance

Actuate BIRT viewers support a feature called progressive viewing, which displays the first few pages as soon as they are generated instead of waiting until the entire report is generated. For long reports, this feature can significantly reduce the amount of time a user waits before the first page appears.

The design and functionality of a report affect the time it takes for BIRT to generate the initial pages. A major factor that hinders performance is the retrieval of data from an underlying data source, and the storage and processing of all that data before BIRT can render the first report page. Optimal viewing performance occurs when BIRT renders a page as soon as the data for that page has been retrieved, before data for the entire report is processed.

To achieve optimal progressive viewing performance, observe the following guidelines:

- Ensure that data sets return only the data that you want to display in each report element (tables, lists, or charts).

For example, if the data in a table must be filtered, grouped, sorted, or aggregated, perform these tasks at the data source level. To manipulate data at the table level, BIRT not only has to retrieve and store more data, it also has to spend more time processing the data.

- If, as recommended in the previous point, you create a data set to return data rows that are already grouped, disable the group sorting in BIRT, which occurs when you create a group using the group editor.

To disable group sorting in BIRT, select the table in which grouping is defined. In Property Editor, choose Advanced, then set the Sort By Groups property to false.

- If creating nested tables (a table within another table) as is common in master-detail reports, create a data set for each table instead of creating a single data set that both the outer and inner tables use.
- Avoid the following items:
 - Top *n* or bottom *n* filters. These filters require that BIRT process an entire set of data to determine the subset of data to display.
 - Aggregations that require multiple passes through data, for example, subtotals as a percentage of a grand total.
 - Summary tables. Even though these tables do not display detail rows, BIRT must still process all the detail rows to calculate and display the summary data.

Building HTML5 charts

This chapter contains the following topics:

- About HTML5 charts
- Creating an HTML5 chart
- Formatting an HTML5 chart
- Writing event handlers

About HTML5 charts

HTML5 is an open standard for structuring and presenting content for the World Wide Web, and is increasingly regarded as the alternative to Flash for creating interactive and animated content for traditional and mobile devices.

HTML5 charts provide the following benefits:

- Animated charts that display on all computers and mobile devices. Flash charts are not supported on all mobile devices. BIRT charts (SVG, BMP, JPG, and PNG) that are generated with the BIRT chart engine are designed for static, print-based documents.
- Highly customizable charts whose presentation, design-time and generation-time properties you can control through the user interface and scripting. Flash charts support only a limited number of properties that can be customized through scripting. BIRT charts support extensive scripting, but not animation.

Comparing HTML5, Flash, and BIRT charts

Use the information in Table 15-1 to decide which chart format to use in a report.

Table 15-1 Features available in HTML5, Flash, and BIRT charts

	HTML5	Flash	BIRT
Displays in the web viewer	✓	✓	✓
Displays in PDF	✓	✓	✓
Displays in other document formats (DOC, PPT, XLS, etc.) as a static image	✓	–	✓
Supported on mobile devices	✓	limited	✓
Provides animation	✓	✓	–
Supports customization through scripting	✓	limited	✓
Rank in number of available chart types, 1 being the highest	3	1	2

Table 15-1 does not list the chart types or chart properties supported by each chart format because that list would be too long. As the last item in the table indicates, in this release, HTML5 charts support the fewest number of chart types. However, the common chart types, such as bar, line, pie, and area, are supported. As you design HTML5 charts, you will also discover that many of the properties available to BIRT charts are also available to HTML5 charts.

If creating animated charts, first review the set of HTML5 charts to see if a suitable chart is available. If you need to present data in a chart that is not available in HTML5 (for example, maps or complex combination charts), use a

Flash object. Note, however, that Flash objects have limited support on mobile devices, and Adobe is discontinuing further development of Flash technology for mobile devices.

Information about using Flash objects in a report is provided later in this book. For information about building BIRT charts, see *BIRT: A Field Guide*.

Rendering platform

Actuate BIRT Designer uses Highcharts, a third-party charting library, to render HTML5 charts. This charting library, written in JavaScript, is integrated into Actuate BIRT Designer's standard chart builder, where you create HTML5 charts using the familiar user interface.

Highcharts also provides a full API, which you can use to programmatically add, remove, or modify chart elements after creating the chart in the chart builder. Access to the Highcharts API is through the chart builder's script editor.

Creating an HTML5 chart

The procedure for creating an HTML5 chart is the same as the procedure for creating a BIRT chart. To create an HTML5 chart, perform the following tasks:

- Drag the chart element from the palette and drop it in the report.
- In the chart builder, choose a chart type, and set Output Format to HTML5, as shown in Figure 15-1. This is the default format if you select a chart type supported by HTML5.
- Specify the data to present in the chart.
- Format the chart.

This chapter describes the features that are unique to HTML5 charts, for example, scripting with the Highcharts API and designing chart themes using JavaScript. For information about the different chart types, specifying data for a chart, and using the standard formatting options, see *BIRT: A Field Guide*.

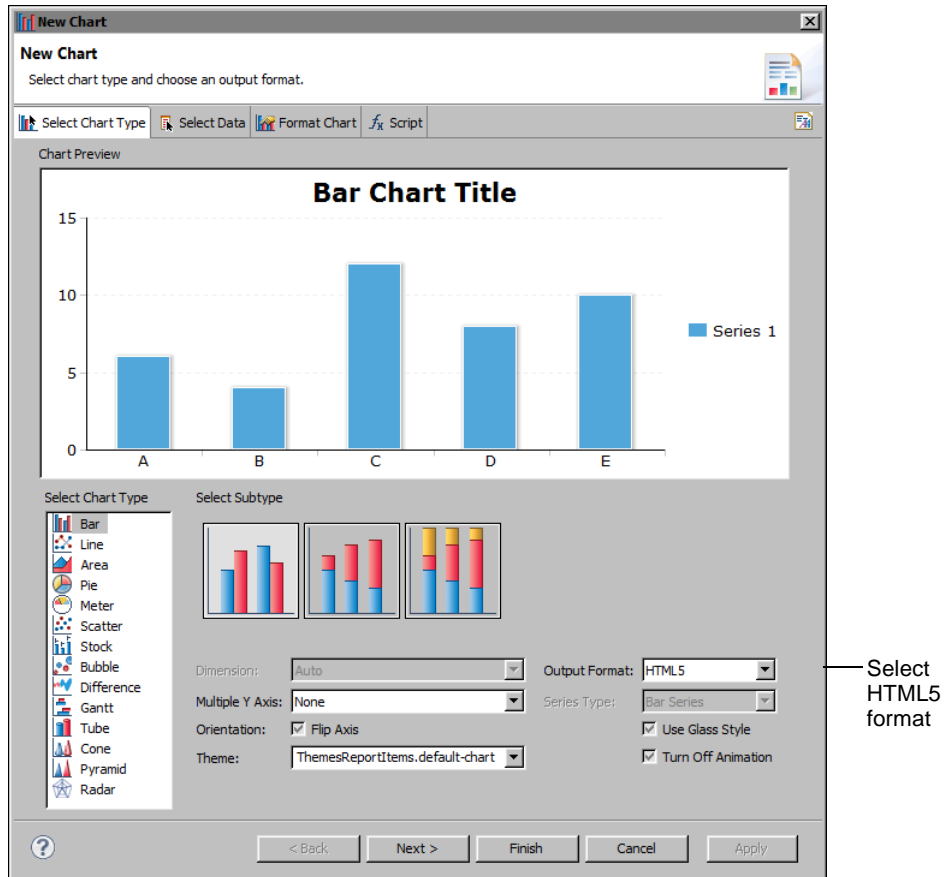


Figure 15-1 Select Chart Type page showing the HTML5 format selected for a bar chart

Formatting an HTML5 chart

As with a BIRT chart, you format an HTML5 chart using one or both of the following methods:

- Use the chart builder's Format Chart page to set style properties for the different parts of the chart.
- Apply a chart theme, which defines styles for the different parts of a chart. Themes provide a flexible way to define and maintain styles in one place and reuse them for any chart that you create. Actuate BIRT Designer provides several predefined themes for HTML5 charts. For a custom look, create your own chart themes.

If using both methods to format a chart, the properties in the chart theme function as the basis for the chart's appearance. Properties that you set in the Format Chart page override properties set by the theme.

The user interface indicates clearly whether a property is set by a theme or set in the chart builder. Properties presented as a list box or as radio buttons display the value Auto for default values that are set by a theme or by the software. These properties display a specific value if set in the chart builder.

Properties set through check boxes have three states—on, off, and default. A check mark indicates the on state, an empty check box indicates the off state, and a check box with a grey check mark or a blue square indicates the default state. The symbol for the default state changes depending on the Windows theme that your machine uses.

A default state can be set by a theme or the software, and the default state can be either on or off. So, even though it might appear counter-intuitive, a grey check mark does not necessarily mean that a property is on by default. For example, the Use Glass Style property, available in the Select Chart Type page, as shown in Figure 15-1, is set to the default state, and the software's default value is off. To apply the glass style to the chart, you would click the check box until it displays a check mark.

Similarly, the property below it, Turn Off Animation, is set to the default state, which is off. In other words, animation is turned on by default. To turn off animation, you would click the check box until it displays a check mark.

Applying a chart theme

On the Select Chart Type page, Theme displays the theme currently applied to the chart, or None, if one is not applied. To change the theme or apply one, select a theme from the drop-down list. The list displays all the predefined themes, as well as, the themes that you created. When you select a theme, the chart previewer shows the changes instantly.

Creating a chart theme

HTML5 charts support two types of chart themes:

- A general chart theme that you create with the graphical chart theme builder, and which you can apply to both BIRT and HTML5 charts.
- A JavaScript theme that you create using JavaScript and the Highcharts API. Use this programming option to define chart attributes that are not available through the graphical chart theme builder, or if you are more comfortable writing scripts and prefer to view all attributes in text format on a single page. Unlike the general chart theme, a JavaScript theme is applicable to HTML5 charts only.

A typical approach to designing chart themes, whether general or JavaScript, is to create one theme for all chart types. Use this approach to design a consistent presentation style for all chart types, one that uses corporate styles, for example. Such a theme might define general attributes, such as color schemes for the chart background and plot areas, font styles for chart titles, value labels, or axis labels, border styles, and legend styles.

The charts in Figure 15-2 and Figure 15-3 are examples of how a bar chart and a line chart appear in a consistent style when the same theme is applied. The charts use the same color schemes, fonts, grid, border and legend styles. In these examples, the charts use a predefined chart theme, ThemesReportItems.Chart Grid. You can use the same design principles when creating custom themes.

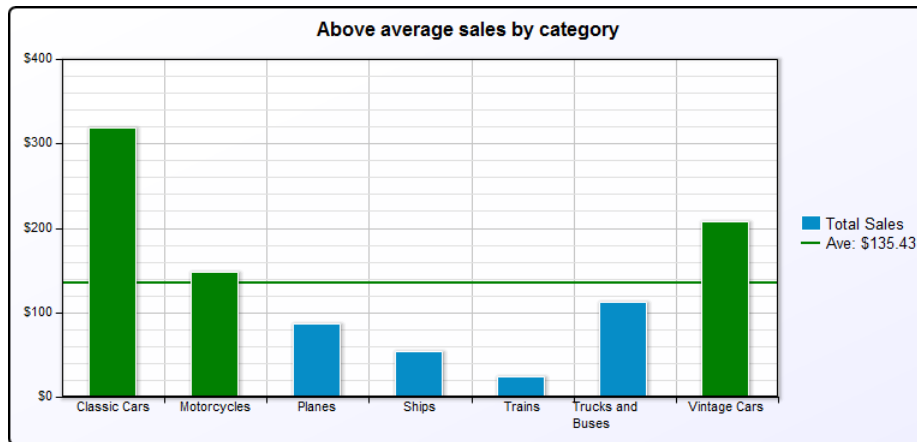


Figure 15-2 Bar chart using a predefined theme, ThemesReportItems.Chart Grid

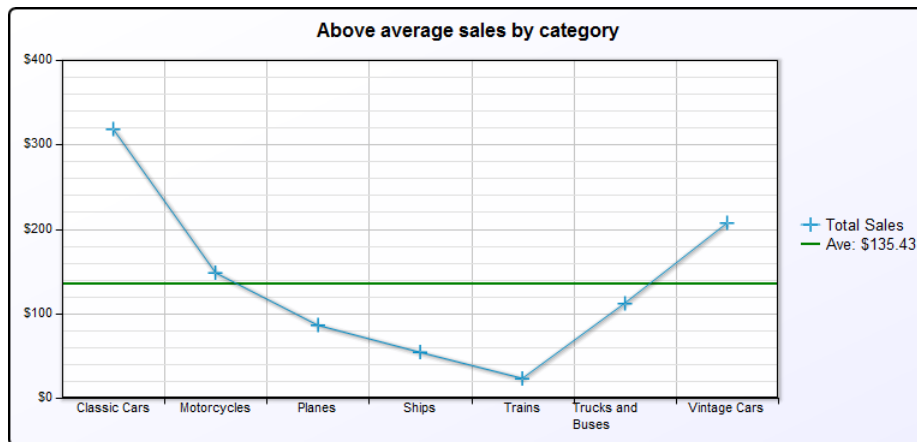


Figure 15-3 Line chart using the same theme, ThemesReportItems.Chart Grid

You can create a chart theme in a report design or in a library. Create a chart theme in a library—the typical approach—to share the theme with other report developers or to use the theme in other reports. A chart theme defined in a report design is available only to charts in that report.



If an existing chart contains the formatting attributes you want to set in a theme, export the attributes to a theme. To do so, open the chart in the chart builder, then click the button at the top right side of the chart builder, and specify a name for the new theme. BIRT creates a theme that contains all the formatting attributes from the chart. The theme is created in the report that contains the source chart and is accessible through the Outline view for the report design. To place this theme in a library, copy it from the Outline view and paste it into a library.

The predefined chart themes included with Actuate BIRT Designer are defined in a library, `ThemesReportItems.rptlibrary`. You can download this library from the Resources folder in Actuate BIRT iServer to use as an example when creating your own library of themes.

Creating a general chart theme

The chart theme builder, which you use to create a general chart theme, organizes and presents properties in a similar way as the Format Page of the chart builder. Figure 15-4 shows the Format Chart Theme page where you set formatting attributes for the different parts of a chart. The preview section shows your formatting changes for the selected chart type, which you choose in the Preview Type page.

Use the Script page to write event-handling code for a theme. This code applies only to HTML5 charts. It is ignored when the theme is applied to a BIRT chart. Information about writing event handlers is provided later in this chapter.

How to create a general chart theme

- 1 In Outline, right-click Themes and choose New Report Item Theme.
- 2 In New Report Item Theme, specify the following information:
 - In Name, type a name for the theme.
 - In Type, select Chart.Choose OK.
- 3 In Chart Theme Wizard, select the first option, General, to define a theme. Choose Next.
- 4 In the chart theme builder, shown in Figure 15-4, define the style properties for the chart theme.

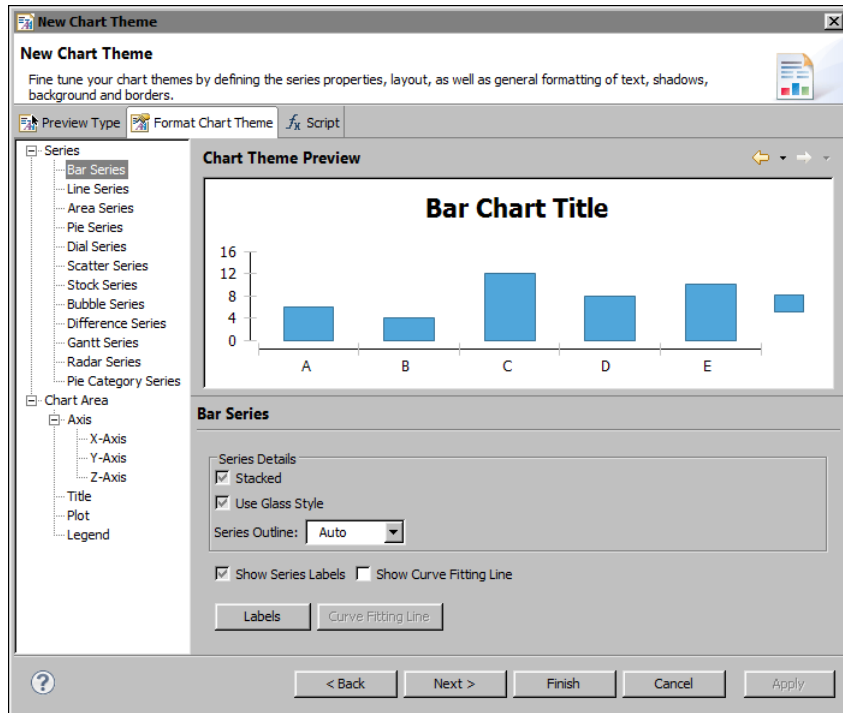


Figure 15-4 Format Chart Theme page of the chart theme builder

Creating a JavaScript chart theme

As mentioned earlier, Actuate BIRT Designer uses Highcharts, a third-party charting library, to render HTML5 charts. To create a JavaScript chart theme, you set the Highcharts chart options to values that provide the visual attributes you desire. Every option has a default value. You define attributes only to change default settings, or to add items that do not appear by default.

Listing 15-1 shows the JavaScript code for the predefined chart theme, Chart Grid. The charts in Figure 15-2 and Figure 15-3 use this theme. As the code shows, options are set using a JavaScript object notation structure. Keys and values are connected by colons, separated by commas, and grouped by curly brackets.

For a complete reference of the options and their descriptions, see the Highcharts documentation at the following location:

<http://www.highcharts.com/ref/>

The Highcharts reference contains two sections, The options object and Methods and properties. Look at The options object for information about the options you can set in a chart theme.

Listing 15-1 JavaScript code for the chart theme Chart Grid

```
colors: ['#058DC7', '#50B432', '#ED561B', '#DDDF00', '#24CBE5',
        '#64E572', '#FF9655', '#FFF263', '#6AF9C4'],
chart: {
    backgroundColor: {
        linearGradient: [0, 0, 500, 500],
        stops: [
            [0, 'rgb(255, 255, 255)'],
            [1, 'rgb(240, 240, 255)']
        ]
    },
    borderWidth: 2,
    plotBackgroundColor: 'rgba(255, 255, 255, .9)',
    plotShadow: true,
    plotBorderWidth: 1
},
title: {
    style: {
        color: '#000',
        font: 'bold 16px "Trebuchet MS", Verdana, sans-serif'
    }
},
subtitle: {
    style: {
        color: '#666666',
        font: 'bold 12px "Trebuchet MS", Verdana, sans-serif'
    }
},
xAxis: {
    gridLineWidth: 1,
    lineColor: '#000',
    tickColor: '#000',
    labels: {
        style: {
            color: '#000',
            font: '11px Trebuchet MS, Verdana, sans-serif'
        }
    },
    title: {
        style: {
            color: '#333',
            fontWeight: 'bold',
            fontSize: '12px',
            fontFamily: 'Trebuchet MS, Verdana, sans-serif'
        }
    }
}
```

```

    }
  },
  yAxis: {
    gridLineWidth: 1,
    minorGridLineWidth: 1,
    minorTickInterval: 'auto',
    lineColor: '#000',
    lineWidth: 1,
    tickWidth: 1,
    tickColor: '#000',
    labels: {
      style: {
        color: '#000',
        font: '11px Trebuchet MS, Verdana, sans-serif'
      }
    },
    title: {
      style: {
        color: '#333',
        fontWeight: 'bold',
        fontSize: '12px',
        fontFamily: 'Trebuchet MS, Verdana, sans-serif'
      }
    }
  },
  legend: {
    itemStyle: {
      font: '9pt Trebuchet MS, Verdana, sans-serif',
      color: 'black'
    },
    itemHoverStyle: {
      color: '#039'
    },
    itemHiddenStyle: {
      color: 'gray'
    }
  },
  labels: {
    style: {
      color: '#99b'
    }
  }
}

```

How to create a JavaScript chart theme

- 1 In Outline, right-click Themes and choose New Report Item Theme.

- 2 In New Report Item Theme, specify the following information:
 - In Name, type a name for the theme.
 - In Type, select Chart.
 Choose OK.
- 3 In Chart Theme Wizard, select the second option, HTML5, to define a theme. Choose Next.
- 4 In the JavaScript chart theme builder, shown in Figure 15-5, write code that defines the desired style properties for the chart theme. The Preview section displays the results of your code for a selected chart type.

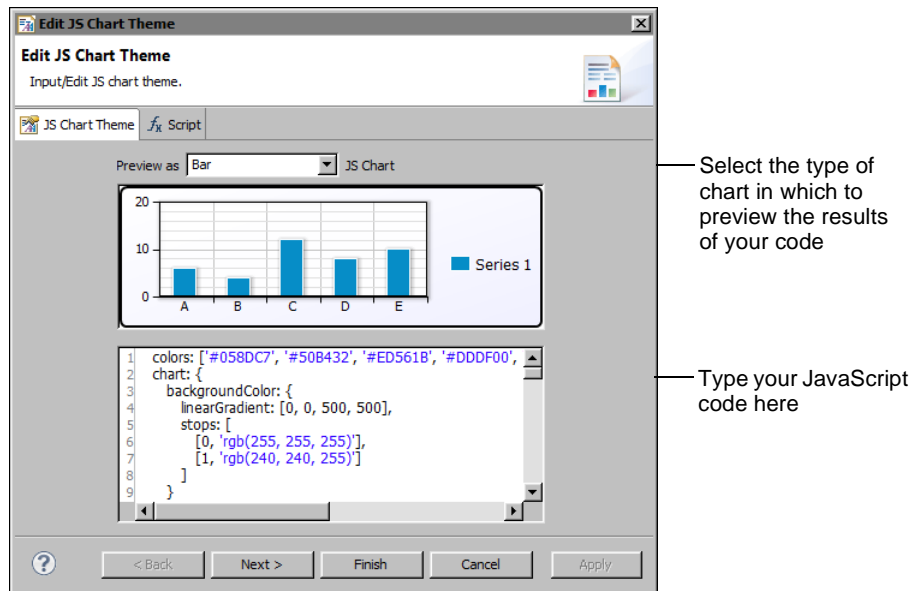


Figure 15-5 Example of JavaScript code and preview of a bar chart

- 5 To write event-handling code, described in the next section, choose the Script tab.

Writing event handlers

You can write scripts in JavaScript that specify the task to perform when a particular event occurs. This type of script is called an event handler. Like BIRT charts, HTML5 charts support two types of event handlers:

- Event handlers that respond to user interactions, such as a mouse click on a legend or a mouse over a series, when viewing the report. For example, you

can create an event handler to link to another report when a user clicks a bar in a bar chart.

- Event handlers that respond to chart events, which occur when BIRT renders the chart. Use this type of event handler to conditionally change or add chart elements as the chart is being generated. For example, you can write an event handler to calculate an average value and display this value as a marker line.

For both types of event handlers, you use the script editor in the chart builder, as shown in Figure 15-6. To launch the script editor, choose the Script tab.

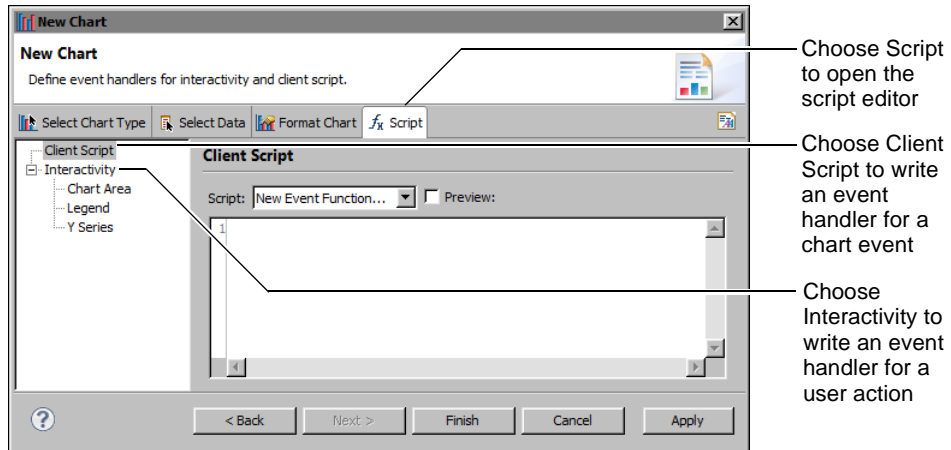


Figure 15-6 Script editor displaying the UI for writing an event handler for a chart event

To create an event handler that responds to a user interaction, choose **Interactivity**. To create an event handler that responds to a chart event, choose **Client Script**, as shown in Figure 15-6.

Scripts that you write using **Client Script** apply to HTML5 charts only. If you later change a chart's output format from HTML5 to SVG, BIRT ignores these client-side scripts when generating the chart.

Writing event handlers that respond to user interactions

Depending on what you want to accomplish, you can create some of these interactivity event handlers without scripting. For typical event handlers, the script editor in the chart builder simplifies the process by providing a list of chart elements, a list of events, and a list of actions. Select the chart element you wish to make interactive, select an event, such as **Mouse Click** or **Mouse Over**, then select an action, such as **Show Tooltip** or **Hyperlink**. To implement a custom action, choose **Invoke Script**, then write JavaScript code. For HTML5 charts, this code can use the Highcharts API.

Figure 15-7 shows an example of an event handler defined for a chart's Y series. The event handler runs when the Mouse Over event is triggered. When triggered, the Show Tooltip action runs. In this example, the tooltip is set to display the series data, which is typical.

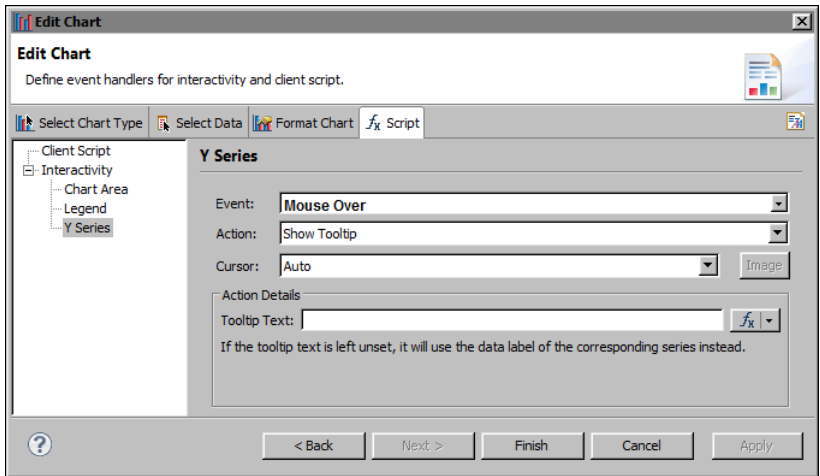


Figure 15-7 Script editor displaying an interactivity event handler

Figure 15-8 shows the results of the previous event handler. When the user places the mouse pointer over the first bar in the bar chart, a tooltip displays the series data value.

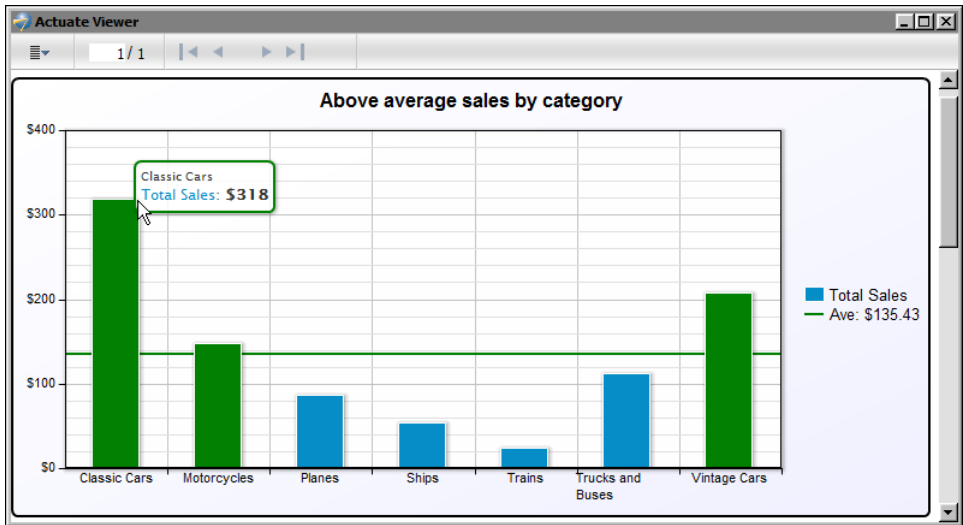


Figure 15-8 A tooltip displays a bar's data value when the user places the mouse pointer over the bar

Figure 15-9 shows an example of an event handler defined for a chart's legend. The event handler runs when the Mouse Click event is triggered. When triggered, the Invoke Script action runs. In this example, the following script brings a series in an area chart to the front when the user clicks the series name in the legend:

```
evt.target.group.toFront();
```

This line of code calls a method in the Highcharts API.

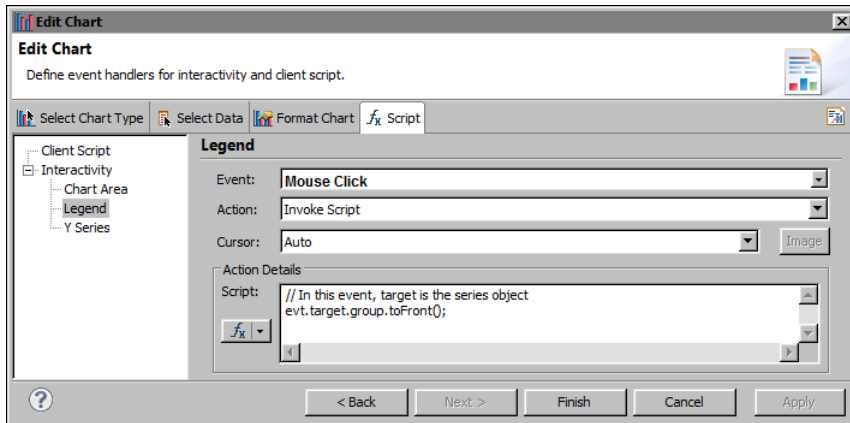


Figure 15-9 Script editor displaying an event handler that runs a script

Figure 15-10 shows the results of the previous event handler. When the user clicks the In Process series in the area chart's legend, the corresponding series in the chart displays in front of the other overlapping series.

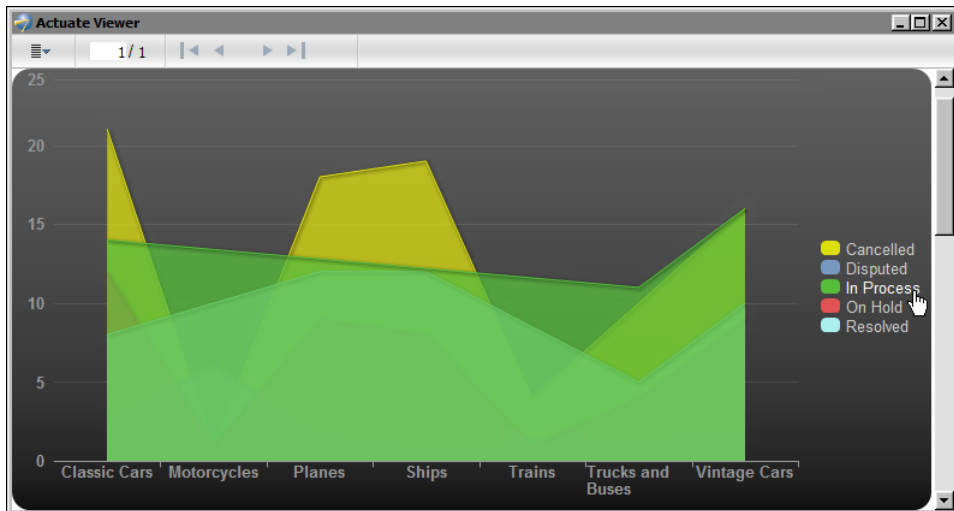


Figure 15-10 In Process series displayed in front when the user clicks the series name in the legend

Compared to BIRT charts, HTML5 charts support fewer events and actions, and fewer chart elements on which to define event handlers. The additional events that BIRT charts support, but that HTML5 charts do not, include Mouse Down, Mouse Up, Mouse Move, Key Down, and Key Up. The additional chart elements for which you can define event handlers in a BIRT chart, but not an HTML5 chart, include the chart title, *y*-axis, and *x*-axis.

If you begin by creating a BIRT chart, then later change the output format to HTML5, BIRT ignores the event handlers defined for events that are specific to a BIRT chart when generating the chart. This behavior provides the flexibility of creating and maintaining event handlers for either chart format with the option of changing the chart format at any time without any additional changes to the design.

Writing event handlers that respond to chart events

Unlike event handlers that respond to user interactions with the chart, the event handlers that you write for chart events require programming in JavaScript. You also have to learn the Highcharts API to know what chart options you can manipulate and how.

In the script editor, you select an event function, such as `beforeRendering()` or `beforeDrawAxis()`, then you write code that performs a specific task or tasks when the chart event occurs. The event handlers that you write for HTML5 chart events differ from the event handlers for BIRT charts in several important aspects, as described in Table 15-2.

Table 15-2 Comparison of event handlers in HTML5 charts and BIRT charts

Event handlers in HTML5 charts	Event handlers in BIRT charts
Support only JavaScript	Support JavaScript and Java
Use client-side scripting and limited server-side scripting	Use server-side scripting only
Use the Highcharts API	Use BIRT’s charting API

Write client-side scripts using the script editor accessible from the Script tab in the chart builder. Write server-side scripts using the script editor accessible from the Script tab in the report editor. Only the following server-side event functions are supported for HTML5 charts: `beforeDataSetFilled()`, `afterDataSetFilled()`, and `beforeGeneration()`

This section provides information about writing client-side event handlers for HTML5 chart events. For information about writing server-side event handlers, see *Integrating and Extending BIRT*.

For documentation about the Highcharts API, go to the following location:

<http://www.highcharts.com/ref/>

About the HTML5 chart events

The set of events for an HTML5 chart is much smaller than the set of events for a BIRT chart. Table 15-3 lists the HTML5 chart event functions and describes when they are called.

Table 15-3 HTML5 chart event functions

Event function	Called
afterRendering(chart)	After the chart is rendered
beforeDrawAxis(axis, axisOptions, chart, axisIndex)	Before rendering each axis
beforeDrawDataPoint(point, pointOptions, chart, seriesIndex, pointIndex)	Before drawing each data point graphical representation or marker
beforeDrawSeries(series, seriesOptions, chart, seriesIndex)	Before rendering the series
beforeGeneration(options)	Before the chart is created
beforeRendering(options, chart)	Before the chart is rendered

Setting chart options through scripting

The before functions are called after BIRT generates the static JavaScript options, which are based on the chart's data and formatting options set in the chart builder. The beforeGeneration() function is the first function called after the generation of the static JavaScript options, but before a chart object is created. Use beforeGeneration() to add chart options that Highcharts provides, but that are not available through the chart builder's format page.

For example, Highcharts provides a credits option to display a credits label in the chart. To add this label to the lower right corner of the chart (the default position), you would write code as follows:

```
beforeGeneration: function(options)
{
    options.credits = {
        enabled: true,
        text: 'Acme Inc.'
    };
},
```

As the code example shows, beforeGeneration() receives an options object. You use this options object to configure chart options. When you type the word, options, followed by a period (.), the script editor displays a list of options, as shown in Figure 15-11. Click an option to view summary information about it. Double-click an option to add it to your code.

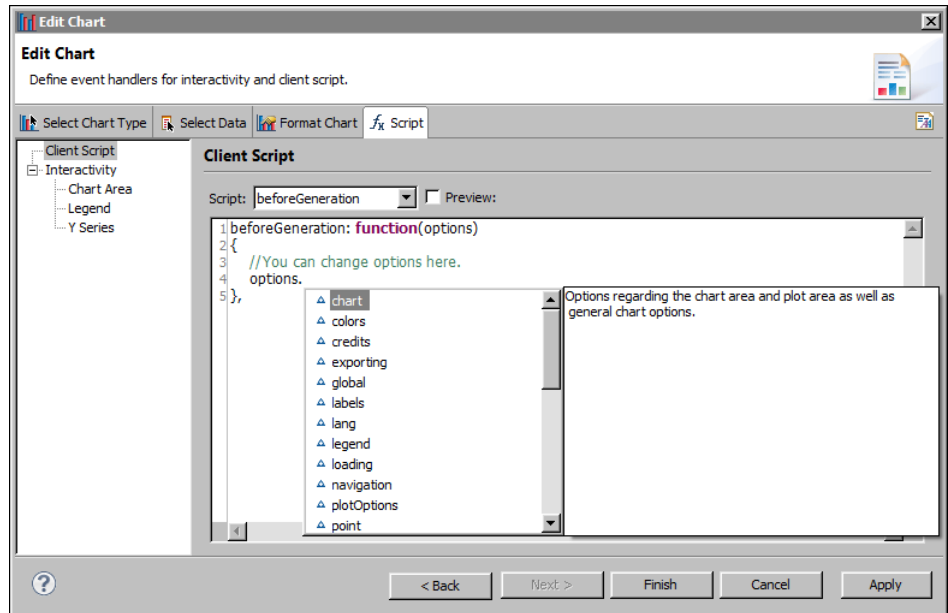


Figure 15-11 The script editor displaying the available options

The other before functions also receive an options object, for example, `axisOptions` or `seriesOptions`, which is specific to the associated chart element. Your code typically makes changes to the options object to change the appearance of an axis, series, or data point. The following code example shows how to use `beforeDrawSeries()` and the `seriesOptions` object to display a legend for all series types except pie:

```
beforeDrawSeries: function(series, seriesOptions, chart,
    seriesIndex)
{
    if ( series.type == "pie" )
    {
        seriesOptions.showInLegend = false;
    }
    else
    {
        seriesOptions.showInLegend = true;
    }
},
```

All the before functions, except `beforeGeneration()`, also receive the chart object, which represents the chart that is created based on the original static options and any options created with `beforeGeneration()`. With the exception of `beforeGeneration()`, your code can query the chart object to determine what changes to make to the options. You typically use these before functions to

dynamically add, change, or remove a chart element based on specified conditions. Your code, however, should not make any changes to the chart object itself because it is a temporary object. Changes to this temporary chart are discarded along with the chart.

After the before functions run, BIRT passes the original options and your scripted options into a constructor to create a new chart object. The afterRendering() function provides the final opportunity to make changes to this new chart object. To get the chart object, use the getCore() method, as shown in the following code snippet:

```
afterRendering: function (Chart)
{
    myChart=Chart.getCore();
    ...
}
```

Scripting example 1

The bar chart in Figure 15-12 shows the following custom options that are added through scripting:

- A script in beforeDrawSeries() calculates the average sales total, and changes the color of bars that show data values above the average value.
- A script in afterRendering() draws a plot line on the y-axis to show the average value, and adds a legend item to display the average value.

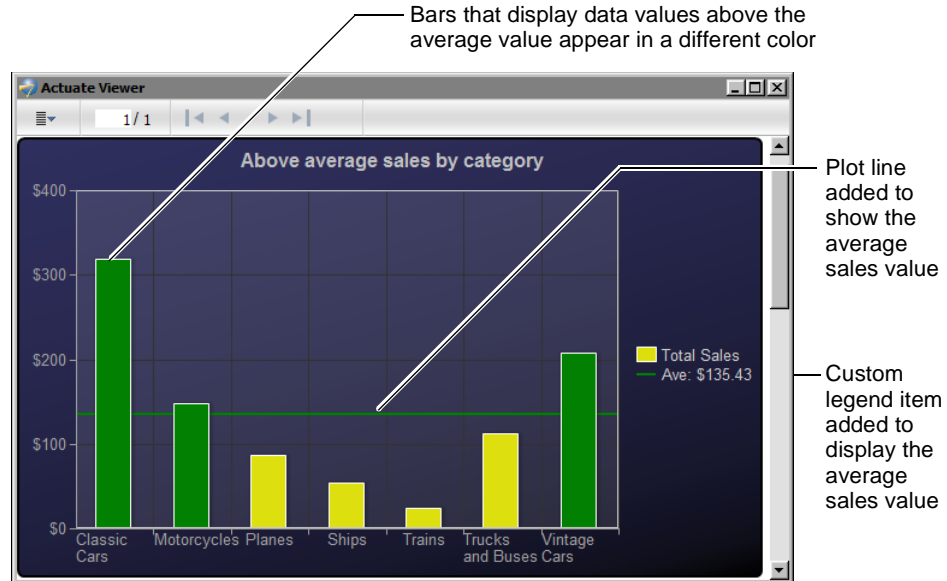


Figure 15-12 Customized options in a bar chart

The event handlers written for the bar chart appear in Listing 15-2.

Listing 15-2 Event-handling script for the bar chart with customized options

```
beforeDrawSeries: function(series, seriesOptions, tempChart,
    seriesIndex)
{
    var totalValue = 0;
    // First, find the average value for the series
    for ( var i = 0; i < series.data.length; i++ )
    {
        totalValue += series.data[i].y;
    }
    aveValue = totalValue / series.data.length;

    for ( var j = 0; j < series.data.length; j++ )
    {
        // Find out if this data point is above average
        if ( series.data[j].y <= aveValue )
        {
            continue;
        }
        // The data point is above average. Color it green.
        var pointOptions = seriesOptions.data[j];
        pointOptions.color = 'green';
    }
},

afterRendering: function(myChart)
{
    // Get the chart object
    chart=myChart.getCore();
    var mySeries = chart.series[0];

    // Assuming aveValue was set in the beforeDrawSeries function,
    // draw a plot line at the average value
    mySeries.yAxis.addPlotLine({
        color: 'green',
        width: 2,
        value: aveValue,
        id: 'averageValuePlotLine',
        zIndex: 2
    });
    // Add a legend item that labels the plot line
    // Do this by adding an empty series
    chart.addSeries({
        color: 'green',
        name: 'Ave: $' + aveValue.toFixed(2),
        marker: {
```

```

        enabled: false
    }
  });
},

```

Scripting example 2

The bar chart in Figure 15-13 shows custom objects, stars, that are added through scripting. Each star indicates the highest value for each order status series. A script in `afterRendering()` performs the following tasks:

- Calculates the highest (max) value for each y-series
- Draws a star based on the width of the bar
- Positions the stars at the top of the appropriate bars

This script showcases Highchart's `renderer` object, which supports drawing shapes, such as circles, rectangles, and stars, and adding images and text to a chart. The `renderer` is useful for adding annotations to a chart. For example, instead of a star, you can annotate the max value by creating text and enclosing it in a rectangle.



Figure 15-13 Bar chart with custom objects

The JavaScript code written for this bar chart appears in Listing 15-3.

Listing 15-3 Event-handling script for the bar chart with custom objects

```
afterRendering: function(myChart)
{
    // Get the chart object
    chart=myChart.getCore();

    // Get the max values from the y-axis series
    for ( var i = 0; i < chart.series.length; i++ )
    {
        var mySeries = chart.series[i];
        var maxValue = mySeries.data[0].y;
        var maxValueIdx = 0;
        if ( !maxValue )
        {
            maxValue = 0;
        }

        for ( var j = 1; j < mySeries.data.length; j++ )
        {
            var curValue = mySeries.data[j].y;
            if ( !curValue )
            {
                continue;
            }

            if ( maxValue < mySeries.data[j].y )
            {
                maxValue = mySeries.data[j].y;
                maxValueIdx = j;
            }
        }

        var maxPoint = mySeries.data[maxValueIdx];

        // Create a group to hold each annotation
        var group = chart.renderer.g().add();

        // Draw a star based on the width of the column,
        // and add it to the group
        var star = chart.renderer.path(['M', maxPoint.barW/2, 0,
            'L',
            maxPoint.barW*.4, maxPoint.barW/4,
            maxPoint.barW*.05, maxPoint.barW/4,
            maxPoint.barW*.325, maxPoint.barW*.475,
            maxPoint.barW*.2, maxPoint.barW*.85,
            maxPoint.barW/2, maxPoint.barW*.6,
```

```

maxPoint.barW*.8, maxPoint.barW*.85,
maxPoint.barW*.675, maxPoint.barW*.475,
maxPoint.barW*.95, maxPoint.barW/4,
maxPoint.barW*.6, maxPoint.barW/4,
'Z']]
.attr({
  fill : 'yellow',
  stroke: 'black',
  'stroke-width': 1
}).add(group);

// Move the group to the top of the correct bar, and set it to
// draw in front of everything in the chart
group.attr({
  translateX: maxPoint.barX + chart.plotLeft,
  translateY: maxPoint.barY + chart.plotTop - maxPoint.barW -
    10
});
group.toFront();
}
},

```

Scripting example 3

The scatter chart in Figure 15-14 shows a vertical and horizontal plot line and tooltip that appear when the mouse pointer is placed over a data point. The plot line and tooltip disappear when the mouse pointer is moved away from a data point.

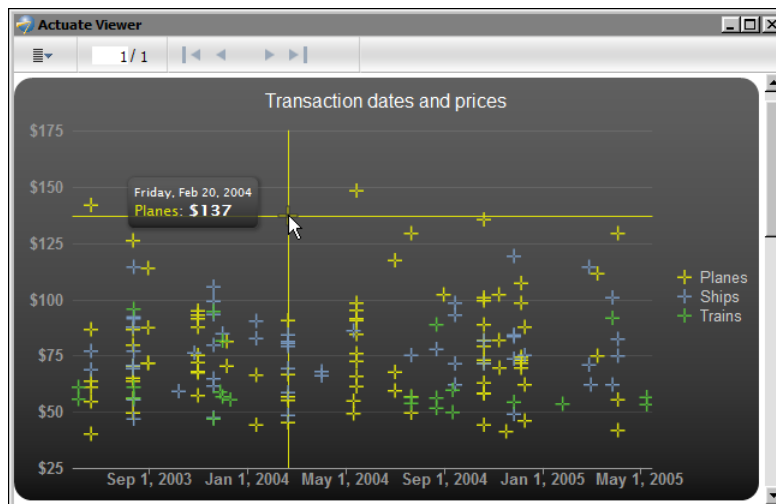


Figure 15-14 Scatter chart displaying a dynamic plot line and tooltip

The event-handling script to display and remove the plot line dynamically appears in Listing 15-4.

Listing 15-4 Event-handling script to display a plot line dynamically

```
beforeRendering: function(options, chart)
{
    options.plotOptions = {
        series : {
            point : {
                events : {
                    mouseOver: function() {
                        this.series.xAxis.addPlotLine({
                            color: this.series.color,
                            width: 1,
                            value: this.x,
                            id: 'dynamicVerticalPlotLine'
                        });
                        this.series.yAxis.addPlotLine({
                            color: this.series.color,
                            width: 1,
                            value: this.y,
                            id: 'dynamicHorizontalPlotLine'
                        });
                    },
                    mouseOut: function() {
                        this.series.xAxis.
                            removePlotLine('dynamicVerticalPlotLine');
                        this.series.yAxis.
                            removePlotLine('dynamicHorizontalPlotLine');
                    }
                }
            }
        }
    };
},
```


16

Using Flash objects in a report

This chapter contains the following topics:

- About Flash
- Software requirements
- Ways to add Flash objects in a report
- Output formats that support Flash

About Flash

Flash, developed by Adobe Systems, is software commonly used for adding animation and interactivity to web pages, and to create rich Internet applications. Actuate BIRT Designer supports the use of Flash objects, such as Flash charts and gadgets, in reports. Figure 16-1 shows examples of the types of Flash objects that reports can display.

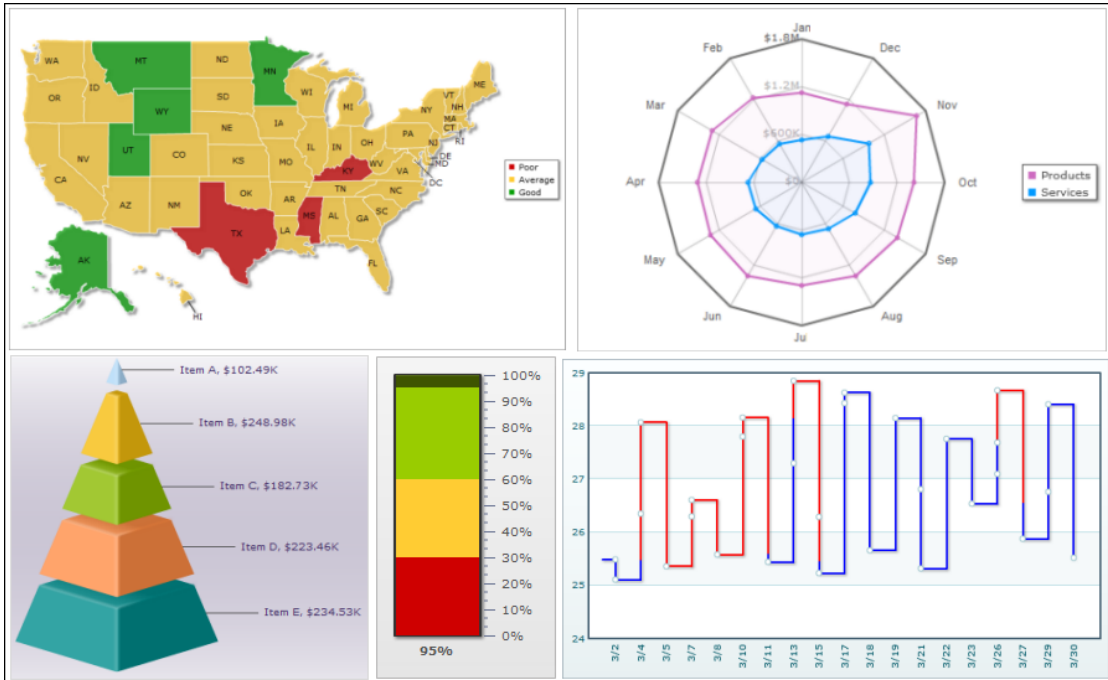


Figure 16-1 Flash charts and gadgets

Software requirements

You must install Adobe Flash Player to view and interact with Flash objects in a report design. Flash player installs as an ActiveX control or browser plug-in. It is available from Adobe at the following location:

<http://www.adobe.com/products/flashplayer>

Ways to add Flash objects in a report

Add Flash objects in a report in any of the following ways. The methods are listed in order of difficulty, from easiest to most difficult:

- Use a built-in Flash chart or Flash gadget. These elements are available in the palette and provide the basic types of charts and gadgets. Actuate BIRT Designer provides tools for creating these elements without any programming. For information about using these elements, see Chapter 17, “Using built-in Flash charts and gadgets.”
- Use a Flash chart, gadget, or other object in the InfoSoft Flash Object Library, a third-party library that is packaged with Actuate BIRT Designer. Using a Flash object from this library requires programming in JavaScript or Java to convert data to the XML format required by the object and then to pass the converted data to the object. For information about using objects in the InfoSoft Flash Object Library, see Chapter 18, “Using the Flash object library.”
- Use a Flash object from a third-party library other than InfoSoft. The procedure for using this type of Flash object is similar to the procedure for using objects in the InfoSoft Flash Object Library.
- Use a custom Flash object that you or another programmer develops using third-party software. This method provides full control and access to the underlying code of the Flash object, but requires knowledge of how the object is created, as well as, how to integrate and use the object in the report. The procedure for using a custom Flash object is similar to the procedure for using objects in the InfoSoft Flash Object Library.

To determine the method to use, consider the data to present and which type of Flash object is most suitable for the data, then look at the available types of built-in Flash charts and gadgets. For example, if you determine that a doughnut chart is best, you need look no further than the built-in Flash chart. However, if you decide that a Flash map is best, look at the maps included in the InfoSoft Flash Object Library. In most cases, the built-in Flash objects and the InfoSoft Flash Object Library provide all the objects suitable for presenting report data.

Output formats that support Flash

HTML reports display Flash content. Report users must have Flash Player installed. PDF reports can also display Flash content if the Adobe Reader supports Flash. Download a version of Adobe Reader that supports Flash from the following location:

<http://www.adobe.com/acrobat>

If creating a report that contains Flash content and that will be viewed in other formats, such as XLS or DOC, use the visibility property to hide Flash objects in formats that do not support Flash. If you do not hide the Flash objects, the report displays a message, such as “Flash report items are not supported in this report format.” As a substitute for a Flash chart or gadget, use a standard chart or an HTML5 chart and set it to appear in formats that do not support Flash content.

Using built-in Flash charts and gadgets

This chapter contains the following topics:

- About Flash charts and gadgets
- Creating a Flash chart and gadget
- Formatting a Flash chart
- Formatting a Flash gadget
- Using animation and other visual effects
- Tutorial 1: Creating a Flash chart
- Tutorial 2: Creating a Flash gadget
- Limitations

About Flash charts and gadgets

Flash charts are charts that use visual effects and animation. Actuate BIRT Designer supports the creation of Flash charts, HTML5 charts, and BIRT charts. BIRT charts are static images whereas Flash and HTML5 charts add motion and more visual interest. For example, an animated Flash column chart can progressively draw its columns from the bottom to the top and its x-axis labels from left to right. For a comparison of Flash and HTML5 charts, see Chapter 15, “Building HTML5 charts.”

Actuate BIRT Designer provides these Flash chart types: column, bar, line, pie, and doughnut. Like Flash charts, Flash gadgets display data graphically and with animation. The difference between the two elements is that a gadget typically displays a single value whereas a chart plots multiple values for comparison. The supported Flash gadgets, shown in Figure 17-1, are meter, linear gauge, sparkline, cylinder, thermometer, and bullet.

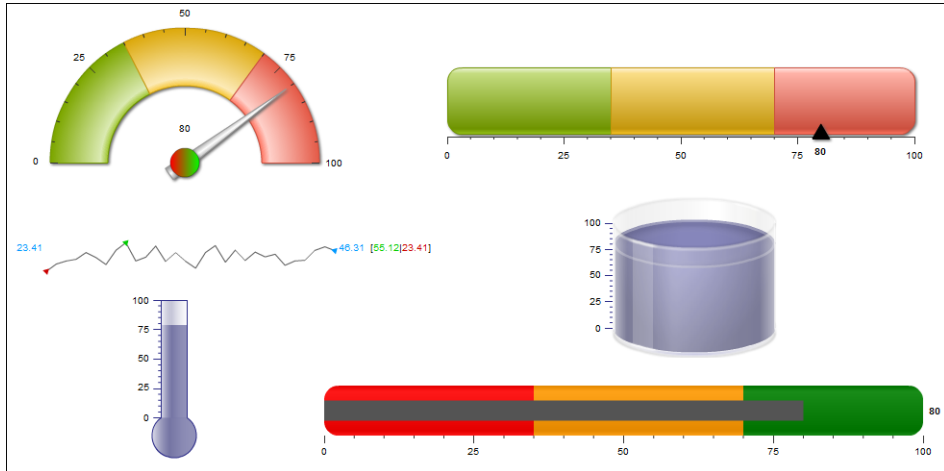


Figure 17-1 Flash gadgets

Creating a Flash chart and gadget

The procedure for creating a Flash chart and gadget is the same as the procedure for creating a BIRT chart. To create a Flash chart or gadget, perform the following tasks:

- Drag the Flash chart or Flash gadget element from the palette and drop it in the report.
- Choose a type of chart or gadget.

- Specify the data to present in the chart or gadget.
- Format the chart or gadget.

The formatting options available to the Flash elements are different from the formatting options available to BIRT charts. While many of the chart parts and formatting attributes are the same, Flash lets you add animation and special visual effects to parts of a chart or gadget.

This chapter describes the formatting options that are unique to Flash charts and gadgets. Flash gadgets are covered in more detail because gadgets have features that differ from those in a BIRT chart. For information about the different chart types, specifying data for a chart, and using the standard formatting options, see *BIRT: A Field Guide*.

Formatting a Flash chart

The Flash chart builder is similar to the standard BIRT chart builder. Both provide a separate page for formatting tasks. Figure 17-2 shows an example of the Format Chart page displaying Series properties for a Flash chart. This page is similar to the Format Chart page in the standard chart builder. The primary difference is the capability to add animation and special visual effects, such as bevels, glow, and blur, to a Flash chart. These tasks are described later in this chapter.

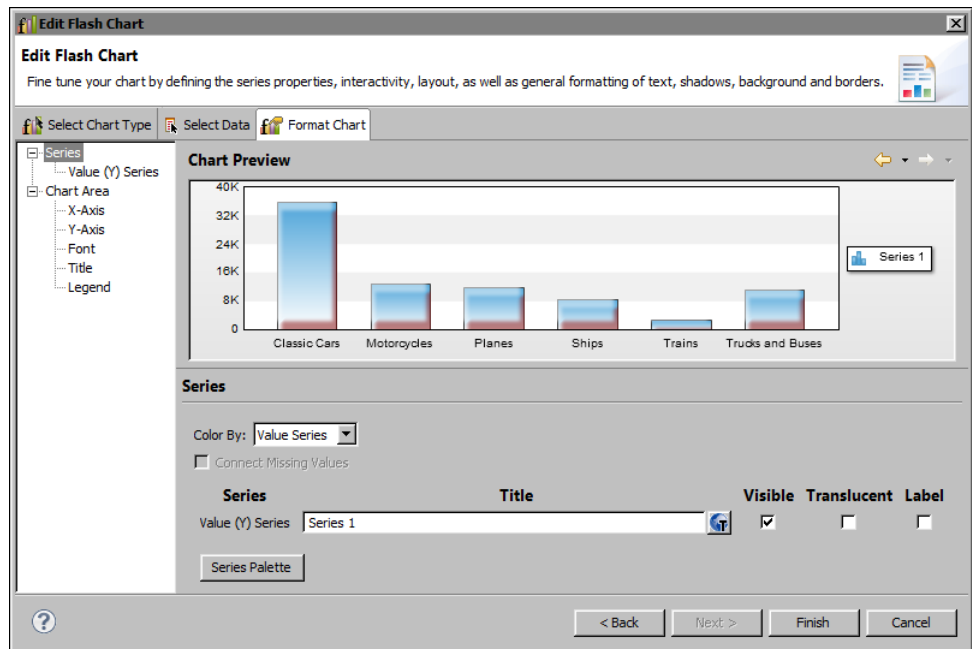


Figure 17-2 Format Chart page in the Flash chart builder

Formatting a Flash gadget

Like the Flash and standard chart builders, the Flash gadget builder provides a separate page for formatting tasks. Figure 17-3 shows an example of the Format Gadget page displaying the general properties for a linear gauge.

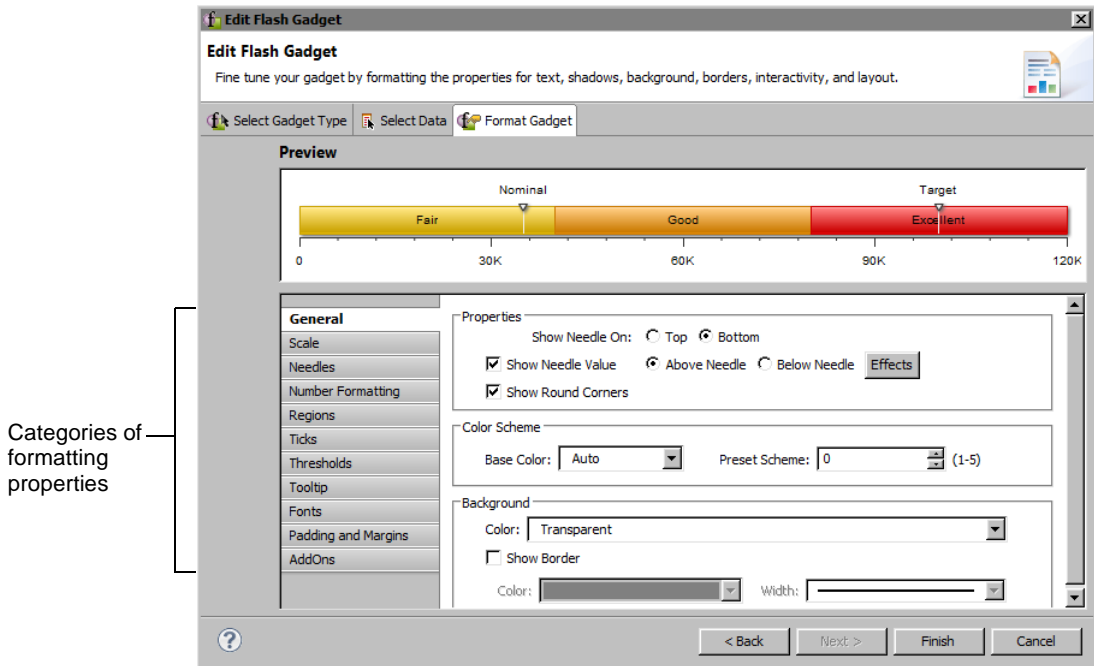


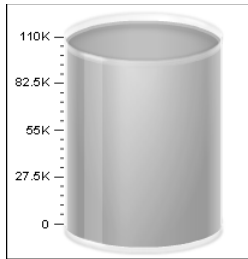
Figure 17-3 Format Gadget displaying a linear gauge and its general properties

Format Gadget lists formatting properties of each visual part of a gadget. As Figure 17-4 shows, for a linear gauge, you can format its scale, needle, numbers, regions, ticks, thresholds, and so on. Each gadget has a different set of formatting properties, which change specific aspects of the gadget's appearance.

General properties

The general properties of a gadget control overall appearance, such as color scheme, background and border style, and whether animation is enabled. General properties can also define the radius of a cylinder gauge, the needle position of a linear gauge, or the start and end angles of a meter gauge. For example, Figure 17-4 shows how changing the Radius, Height, and Viewing Angle properties affects the view of a cylinder gauge gadget. Radius and Height values are expressed as percentages of the gadget area.

Radius: 20%(default)
Height: 50% (default)
Viewing Angle: 30 (default)



Radius: 30%
Height: 60%
Viewing Angle: 0

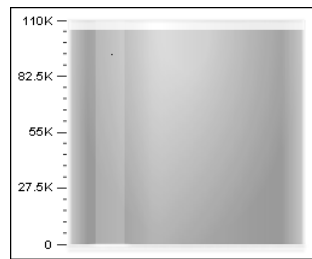
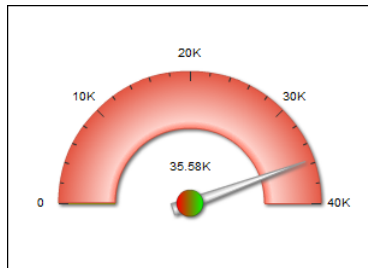


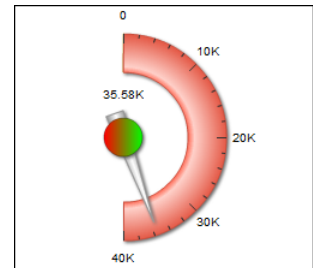
Figure 17-4 Examining results of setting properties for a cylinder gauge

Figure 17-5 shows examples of setting the Start Angle and End Angle properties to change the shape and orientation of a meter gauge. The examples also show how to use the Outer Radius and Inner Radius properties to set the thickness of the arc in the gauge.

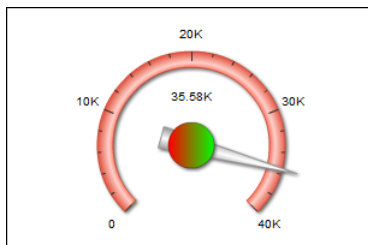
Start Angle: 180 (default)
End Angle: 0 (default)
Outer Radius: 70% of Radius (default)
Inner Radius: 40% of Radius (default)



Start Angle: 90
End Angle: -90
Outer Radius: 40% of Radius
Inner Radius: 25% of Radius



Start Angle: 225
End Angle: -45
Outer Radius: 30% of Radius
Inner Radius: 25% of Radius



Start Angle: 45
End Angle: 135
Outer Radius: 50% of Radius
Inner Radius: 50% of Radius

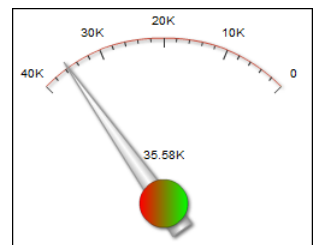


Figure 17-5 Examining results of setting properties for a meter gadget

Table 17-1 shows all the general properties and lists the gadgets to which they apply. Some properties appear for only one type of gadget. Other properties are common to multiple types of gadgets.

Table 17-1 General properties

Property	Gadget	Usage
Background Color	All	Sets the background color of the gadget.
Base Color	All	Sets the color scheme of the gauge. You can use either a base color or a preset color scheme. All other selections derive from this selection.
Center X Coordinate	Meter	Specifies the <i>x</i> coordinate of the gauge center.
Center Y Coordinate	Meter	Specifies the <i>y</i> coordinate of the gauge center.
Color	All	Specifies the color of the border around the gadget.
Connect Missing Data	Sparkline	Connects a line between missing points of data.
End Angle	Meter	Specifies the angle where the gauge ends drawing.
Fill color	Cylinder, thermometer	Specifies the color of the contained image within a filled type of gadget, such as a cylinder or thermometer.
Height	Cylinder, thermometer	Specifies the percentage of the gadget area that the gadget image height occupies.
Inner Radius	Meter	Specifies the radius of the inner portion of the gauge.
Outer Radius	Meter	Specifies the radius of the outer portion of the gauge.
Preset Scheme	All	Selects a preset color scheme for the gauge. You can use either a base color or a preset color scheme. All other selections derive from this selection.
Radius (or Bulb Radius)	Cylinder, thermometer	Species the percentage of the gadget area that the gadget image radius occupies.
Show Border	All	Enables or disables the border around the gadget.
Show Dial Values	Meter	Enables or disables the value display on the dial. The dial position can be selected to be above or below the dial.
Show Needle On	Linear gauge	Set to top to have needles appear on top of the gadget, set to bottom to have them appear on the bottom.

Table 17-1 General properties

Property	Gadget	Usage
Show Needle Value	Linear gauge	Enables or disables the display of the value at the needle. If enabled, set to Above Needle to display the value above the needle, or set to Below Needle to display the value below the needle.
Show Round Corners	Linear gauge, bullet	Enables or disables rounded corners on the gauge.
Show Value	Cylinder, thermometer	Enables or disables the display of the value the gadget is illustrating.
Start Angle	Meter	Specifies the angle where the gauge begins drawing.
Start X Coordinate	Cylinder	Chooses a starting <i>x</i> coordinate percentage that positions the image within the gadget. Selecting 0 starts the image at the left side of the gadget.
Start Y Coordinate	Cylinder	Chooses a starting <i>y</i> coordinate percentage that positions the image within the gadget. Selecting 0 places the starting <i>y</i> coordinate at the top of the gadget, selecting 100 places it at the bottom.
Style	All	Supports adding a style to the gadget.
Sub-Title	Sparkline, bullet	Adds a subtitle to the gadget.
Title	Sparkline, bullet	Adds a title to the gadget.
Turn Off All Animations	All	Enables or disables all animation effects.
Turn Off Default Animations	All	Enables or disables default animation.
Viewing angle	Cylinder	Specifies the angle at which the gadget is viewed. Valid values are 0 through 50. 0 appears flat, 50 is tilted towards the viewer.
Width	Linear gauge, meter	Specifies the thickness of the border around the gadget.

Scale properties

Scale properties define the range of values and the number of tick marks that a gadget displays. The scale properties affect the numbers displayed on the gadget, not its size. Minimum Value and Maximum Value specify the lowest and highest numbers, respectively. However, if the data set value (represented by the needle value) is lower than the minimum value or higher than the maximum value, the minimum or maximum value is ignored.

Figure 17-6 shows scale properties set for a linear gauge.

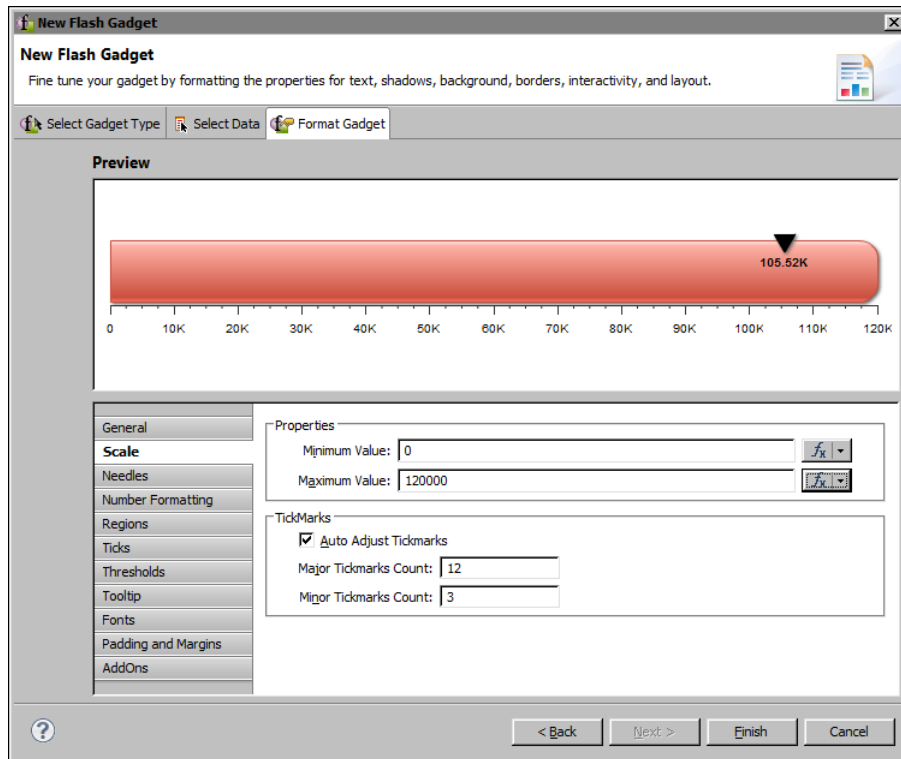


Figure 17-6 Format Gadget displaying a linear gauge and its scale properties
Table 17-2 shows all the scale properties and lists the gadgets to which they apply.

Table 17-2 Scale properties

Property	Gadget	Usage
Auto Adjust Tickmarks	All but sparkline	Enables or disables tick marks created evenly across the scale
Major Tickmarks Count	All but sparkline	Specifies the number of major tick marks to display on the scale
Maximum Value	All	Sets the highest value of the scale
Minimum Value	All	Sets the lowest value of the scale
Minor Tickmarks Count	All but sparkline	Specifies the number of minor tick marks to display between major tick marks

Needle properties

Needle properties define the shape, size, and color of a needle. A needle appears only in a linear gauge and in a meter gauge, and is used to point to a data value. Figure 17-7 shows the needle properties set for a meter gauge.

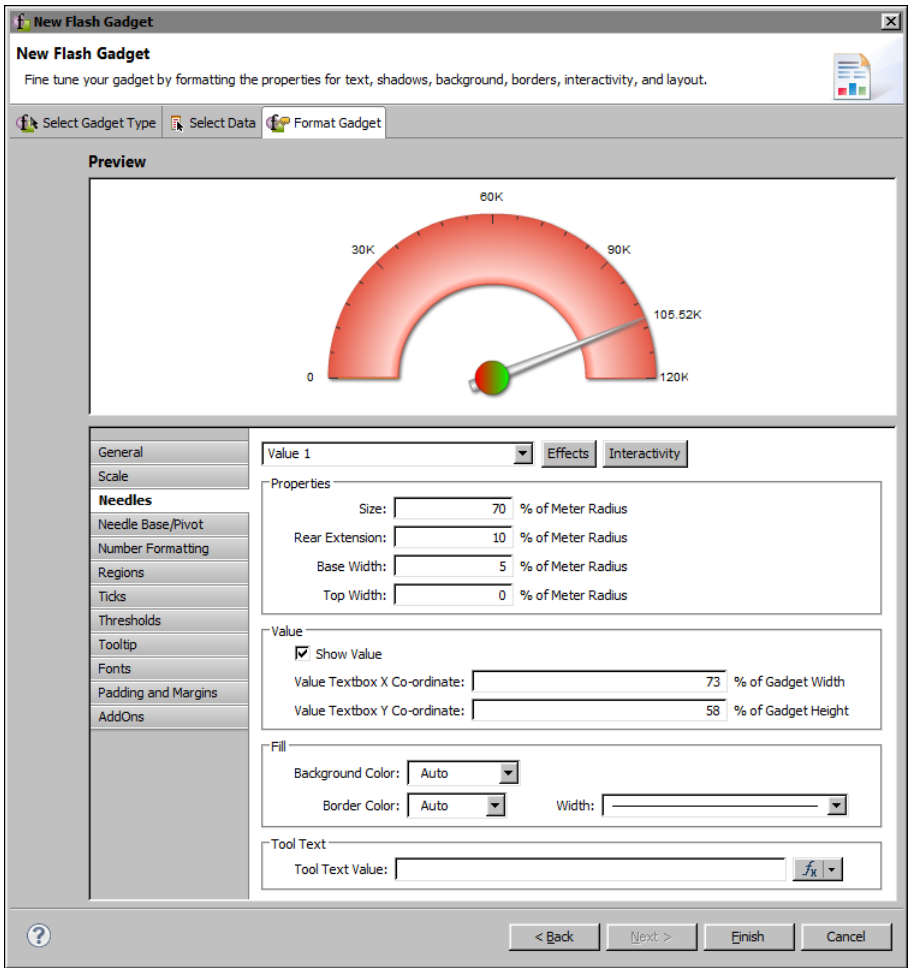


Figure 17-7 Selecting options for the needle of a meter gauge gadget

For a meter gauge, the needles properties apply only to the pointer part of the needle. To format the base, or pivot, of the needle (represented by the circle), choose Needle Base/Pivot.

Table 17-3 shows all the needle properties and lists the gadgets to which they apply.

Table 17-3 Needle properties

Property	Gadget	Usage
Base Width	Meter	Sets the size of the bottom part of the needle, as a percent of the size of the gadget.
Border Color	Linear gauge, meter	Sets the border color of the needle.
Border Width	Linear gauge, meter	Sets the thickness of the needle border.
Fill Background Color	Meter	Sets the background color of needle.
Fill Color	Linear gauge	Sets the interior color of the needle.
Rear Extension	Meter	Sets the size of the portion of the needle behind the pivot as a percent of the size of the gadget.
Shape	Linear gauge	Sets the shape of the needle.
Show Value	Meter	Enables or disables the display of the value to which the needle points.
Size	Linear gauge, meter	Sets the size in pixels, or in percent of gadget width, of the needle.
Tooltip	Linear Gauge, meter	Specifies text for the tooltip.
Top Width	Meter	Sets the size of the tip of the needle as a percent of the size of the gadget.
Value	Linear gauge, meter	Sets which needle to format. Several needles can co-exist, based on the data used to create the gadget.
Value Textbox X Co-ordinate	Meter	Sets the <i>x</i> coordinate of the value text, as a percent of gadget width.
Value Textbox Y Co-ordinate	Meter	Sets the <i>y</i> coordinate of the value text, as a percent of gadget height.

Needle base or pivot properties

Needle base or pivot properties define the appearance of a needle base, or pivot. Drawn as a circle, the base is the point around which the needle rotates. A needle base appears only for a meter gauge. Figure 17-8 shows the needle base properties set for a meter gauge. The size of the needle base is larger than the default size, and the fill color is set to a radial gradient.

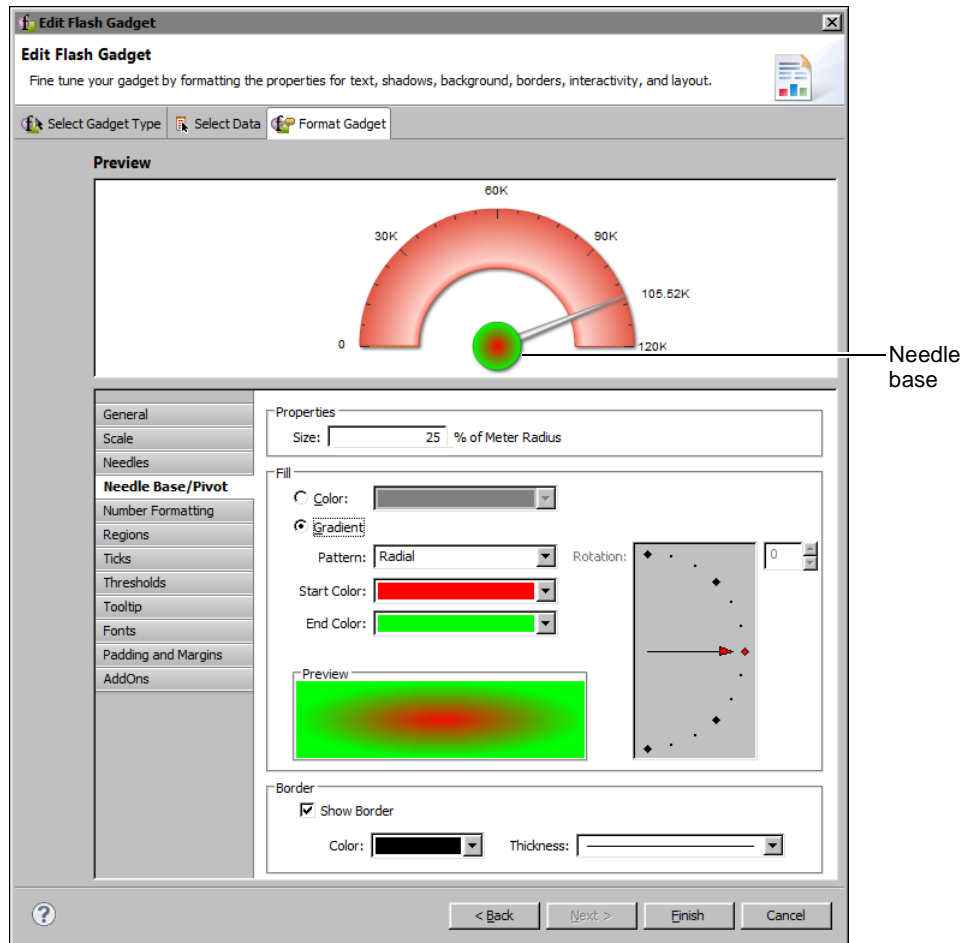


Figure 17-8 Selecting options for the needle base of a meter gauge

Table 17-4 shows all the needle base or pivot properties. These properties are used only in a meter gauge.

Table 17-4 Needle base/pivot properties

Property	Usage
Border Color	Sets the border color of the needle base.
Border Thickness	Sets the width of the needle base border.
End Color	Sets the ending color to use in a fill gradient.
Fill Color	Sets the interior color of the needle base to a solid color.

(continues)

Table 17-4 Needle base/pivot properties (continued)

Property	Usage
Fill Gradient	Sets the interior color of the needle base to a color gradient.
Pattern	Specifies the pattern of the fill gradient. Choose Radial or Linear.
Rotation	Sets the angle of a linear fill gradient.
Show Border	Displays or hides the border around the needle base.
Size	Sets the size of the needle base as a percent of the meter radius.
Start Color	Sets the starting color to use in a fill gradient.

Number formatting properties

Number formatting properties define how numbers are displayed in a gadget. Use these properties to abbreviate numbers, to add text before or after a number, or to specify the number of digits to display after a decimal point. Figure 17-9 shows the number formatting properties set for a thermometer gauge. Numbers display with the dollar symbol (\$) before the number and they appear in abbreviated format, such as \$30K instead of \$30,000.

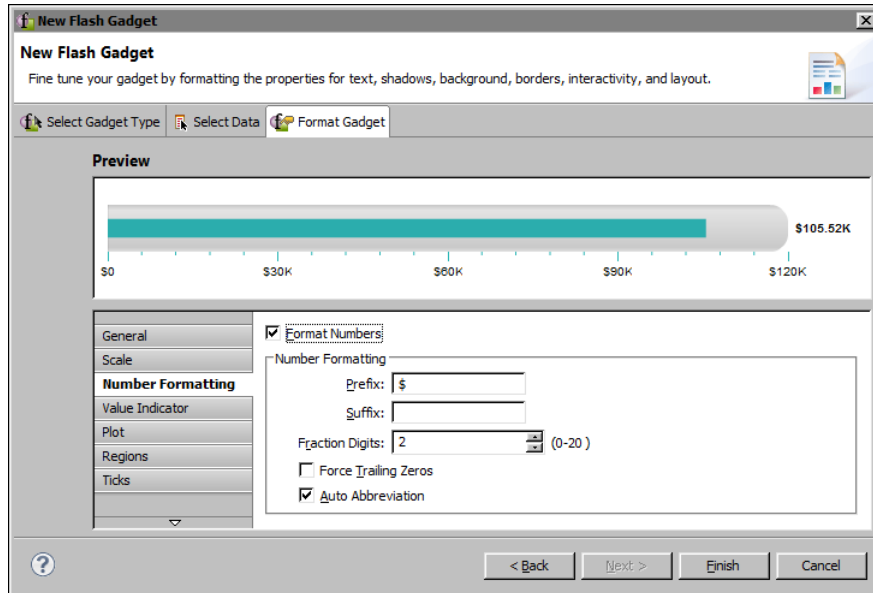


Figure 17-9 Examining a linear gauge and its number formatting properties

Table 17-5 shows all the number formatting properties. These properties are used in all the gadgets.

Table 17-5 Number formatting properties

Property	Usage
Auto Abbreviation	Abbreviates a number to an appropriate number factor. For example, 10,000 becomes 10K.
Force Trailing Zeros	Enables or disables the display of trailing zeros after the decimal point.
Format Numbers	Enables and disables number formatting.
Fraction Digits	Specifies the number of digits displayed after the decimal point.
Prefix	Specifies a text value to display before a number.
Suffix	Specifies a text value to display after a number.

Region properties

Region properties enable the division of the data plot into regions. Use regions to provide more information about values in a gadget. Compare the linear gauges in the following figures. The gauge in Figure 17-10 does not show regions. The gauge in Figure 17-11 displays three regions, labeled Fair, Good, and Excellent.

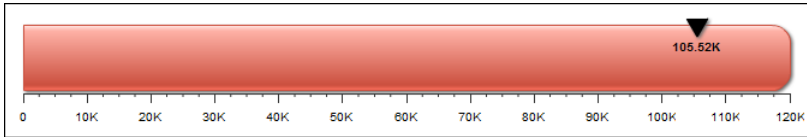


Figure 17-10 Linear gauge without regions

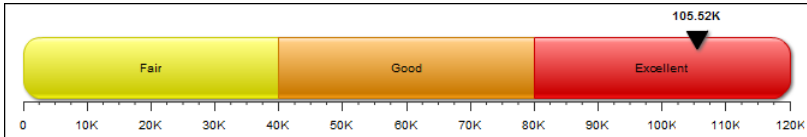


Figure 17-11 Linear gauge with three regions

Figure 17-12 shows the properties set for the region labeled Fair in Figure 17-11.

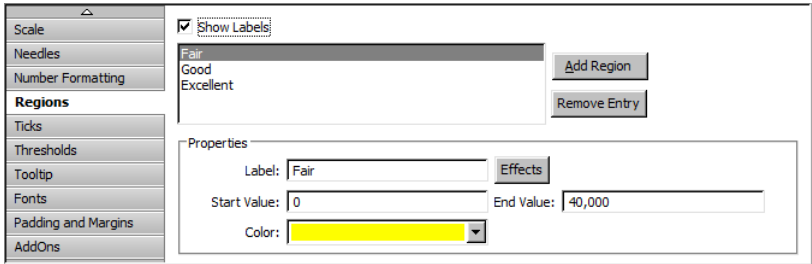


Figure 17-12 Properties specified for a region labeled Fair

Table 17-6 shows all region properties and lists the gadgets to which they apply.

Table 17-6 Region properties

Property	Gadget	Usage
Color	Linear gauge, meter, bullet	Specifies the color of the region.
End Value	Linear gauge, meter, bullet	Specifies where the region ends.
Label	Linear gauge, meter, bullet	Specifies the name of the region.
Region	Linear gauge, meter, bullet	Chooses the region for which the settings apply. You can also add or remove a region from the list.
Show Labels	Linear gauge	Display or hide the region labels.
Start Value	Linear gauge, meter, bullet	Specifies where the region starts.

Tick properties

Tick properties define the size, color, and position of tick marks on a gadget.

Figure 17-13 shows the tick properties set for a linear gauge. Tick marks appear at the top and inside the gauge. The first and last tick values display Min and Max instead of numbers.

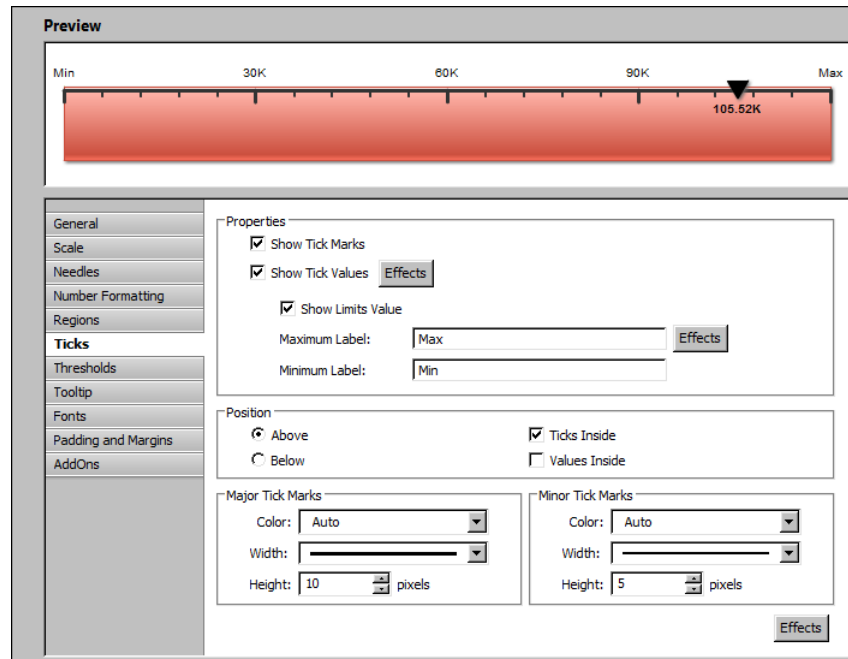


Figure 17-13 Format Gadget displaying a linear gauge and its tick properties

Table 17-7 shows all the tick properties and lists the gadgets to which they apply.

Table 17-7 Tick properties

Property	Gadget	Usage
Major Tick Marks Color	Linear gauge, meter, bullet, cylinder, thermometer	Sets the color of major tick marks.
Major Tick Marks Height	Linear gauge, meter, bullet, cylinder, thermometer	Sets the height of major tick marks.
Major Tick Marks Width	Linear gauge, meter, bullet, cylinder, thermometer	Sets the width of major tick marks.
Maximum Label	Linear gauge, meter, bullet, cylinder, thermometer	Sets the highest tick mark value. Text replaces the numeric value.
Minimum Label	Linear gauge, meter, bullet, cylinder, thermometer	Sets the lowest tick mark value. Text replaces the numeric value.
Minor Tick Marks Color	Linear gauge, meter, bullet, cylinder, thermometer	Sets the color of minor tick marks.
Minor Tick Marks Height	Linear gauge, meter, bullet, cylinder, thermometer	Sets the height of minor tick marks.
Minor Tick Marks Width	Linear gauge, meter, bullet, cylinder, thermometer	Sets the width of minor tick marks.
Position	Cylinder, thermometer	Positions tick marks on the right side of the gadget.
Position Above	Linear gauge, meter, bullet	Sets tick marks to appear above the gadget.
Position Below	Linear gauge, meter, bullet	Sets tick marks to appear below the gadget.
Position Left	Cylinder, thermometer	Positions tick marks on the left side of the gadget.
Show Limits Value	Linear gauge, meter, bullet, cylinder, thermometer	Enables or disables the display of the first and last values.
Show Tick Marks	Linear gauge, meter, bullet, cylinder, thermometer	Enables or disables the display of tick marks on the gadget.
Show Tick Values	Linear gauge, meter, bullet, cylinder, thermometer	Enables or disables the display of values on tick marks.
Ticks Inside	Linear gauge, meter, bullet	Sets tick marks to appear inside or outside of the gadget.
Values Inside	Linear gauge, meter, bullet	Sets tick mark values to appear inside or outside of the gadget.

Threshold properties

Threshold properties define thresholds, which you use to identify meaningful values. For example, in a linear gauge that displays a sales total, you can add a threshold that identifies the target sales amount, as shown in Figure 17-14. By displaying this threshold value, the gauge shows whether the actual sales total is over or under the sales target.

Figure 17-14 also shows the threshold properties set to create the threshold. You can specify a label, create a threshold line or a threshold zone, specify a threshold value or range of values, and format the line and marker. You can create multiple thresholds for a gadget.

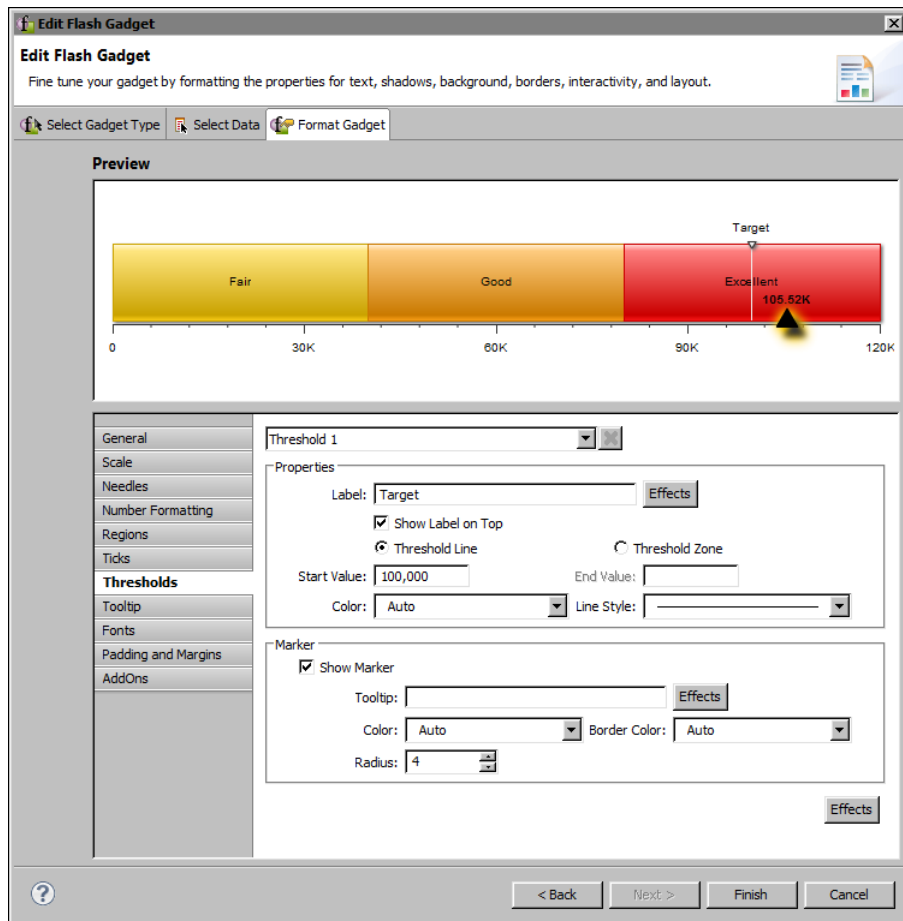


Figure 17-14 Examining a linear gauge and its threshold properties

Table 17-8 shows all the threshold properties and lists the gadgets to which they apply.

Table 17-8 Threshold properties

Property	Gadget	Usage
Arc Inner Radius	Meter	Specifies the inner radius of arc for the threshold area
Arc Outer Radius	Meter	Specifies the outer radius of arc for the threshold area
Border Color	Linear gauge, meter	Sets the border color of the threshold marker
Color	Linear gauge, meter, sparkline	Sets the color of the threshold area on the gadget
End Value	Linear gauge, meter, sparkline	Sets the end value of the threshold zone
Label	Linear gauge, meter	Specifies the text to apply to the threshold
Length	Bullet	Specifies the length of the threshold as a percent of gadget size
Line Style	Linear gauge, meter, sparkline	Sets the line style of the threshold
Marker Color	Linear gauge, meter	Sets the color of the threshold marker
Radius	Linear gauge	Sets the size of the threshold marker
Show as Zone	Sparkline	Enables or disables display of the threshold as a zone
Show Border	Meter	Enables or disables display of a border around the threshold
Show Marker	Linear gauge, meter	Enables or disables display of the marker on the threshold
Show Threshold	Sparkline, bullet	Enables or disables display of the threshold
Show Value	Meter	Enables or disables display of the threshold value
Show Value Inside	Meter	Displays value inside or outside of the arc on the gadget
Show Value on Top	Linear gauge	Enables or disables display of the threshold value
Size	Meter	Sets the size of the threshold marker
Start Value	Linear gauge, meter, sparkline	Sets start value of the threshold zone
Threshold	Linear gauge, meter	Sets which threshold the settings affect

(continues)

Table 17-8 Threshold properties (continued)

Property	Gadget	Usage
Threshold Line/ Threshold Zone	Linear gauge, meter	Sets whether the threshold is a single line or a zone
Tooltip	Linear gauge, meter	Sets tooltip text for the marker on the threshold
Width	Sparkline, bullet	Sets the width of the threshold

Anchor properties

Anchor properties control the shape, size, color, and visibility of markers, or anchors, in a sparkline gadget. Unlike other gadgets that display only one or two data values, a sparkline gadget plots multiple values and, by default, uses anchors to highlight the first, last, lowest, and highest values. Figure 17-15 shows the anchor properties set for a sparkline gadget.

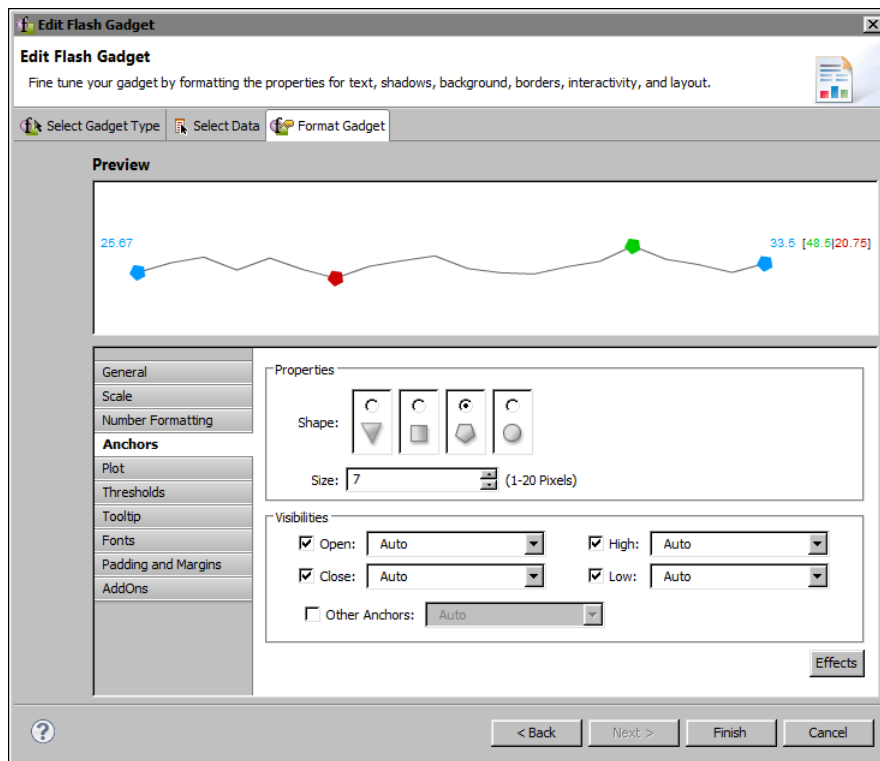


Figure 17-15 Examining a sparkline gadget and its anchor properties

Table 17-9 shows all the anchor properties. These properties are used only in a sparkline gadget.

Table 17-9 Anchor properties

Setting	Usage
Shape	Sets the shape of the anchors.
Size	Sets the size of the anchor in pixels.
Visibilities	Sets the visibility and color of the anchors. Open, Close, High, and Low anchors are visible by default. To display anchors for all the other values, select Other Anchors.

Plot properties

Plot properties control the appearance of elements in the data plot area of bullet and sparkline gadgets. For a bullet gadget, you can add a border around the gadget or a shadow below it. You can also specify whether to display the value label and whether to display the value indicator as a line or as a dot.

For a sparkline gadget, you can specify whether to display the first, last, lowest, or highest values, change the color and width of the data line, and add bars in the background to represent period blocks. For example, if a sparkline displays daily stock quotes over a month, you can show period blocks that have a length of 5 to divide the stock values into weeks. The value of 5 assumes that each week has five trading days.

For example, Figure 17-16 shows the preview of a sparkline gadget. The gadget displays period bars where each period contains five values. Alternate bars appear in color.

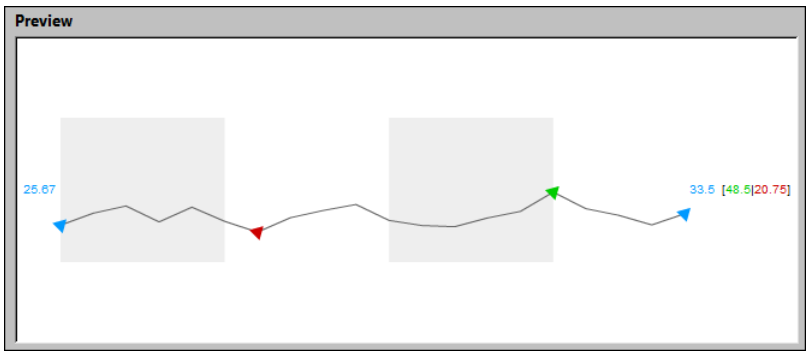


Figure 17-16 Format Gadget displaying a sparkline gadget

Figure 17-17 shows the plot properties specified for the plot that appears in the sparkline gadget example shown in Figure 17-16.

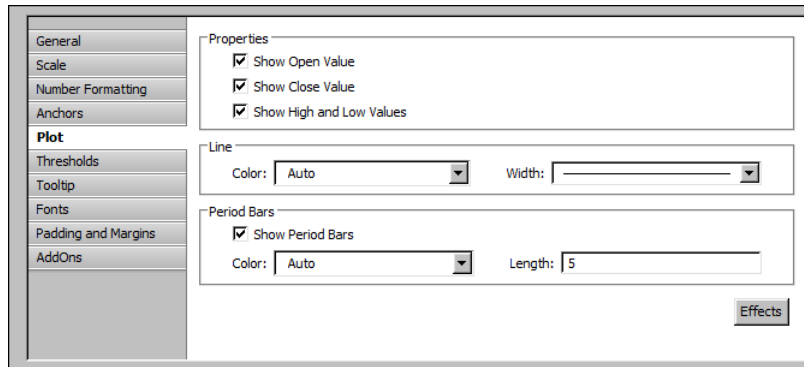


Figure 17-17 Examining the plot properties for a sparkline gadget
Table 17-10 shows all the plot properties.

Table 17-10 Plot properties

Property	Gadget	Usage
Border	Bullet	Enables or disables the border around the gadget.
Border Color	Bullet	Sets the color of the border around the gadget.
Border Width	Bullet	Sets the thickness of the border around the gadget.
Line Color	Sparkline	Sets the color of the plot line.
Line Width	Sparkline	Sets the thickness of the plot line.
Period Bars Color	Sparkline	Sets the color of the period bars. The color is applied to alternate bars.
Period Bars Length	Sparkline	Sets the number of values that each period bar highlights.
Show as Dot	Bullet	Enables or disables the display of the value indicator as a dot instead of a solid line.
Show Close Value	Sparkline	Enables and disables the display of the close value.
Show High and Low Values	Sparkline	Enables and disables the display of the high and low values.
Show Open Value	Sparkline	Enables and disables the display of the open value.
Show Period Bars	Sparkline	Enables and disables the display of period bars.

Table 17-10 Plot properties

Property	Gadget	Usage
Show Shadow	Bullet	Enables or disables the appearance of a shadow below the gadget.
Show Value Label	Bullet	Enables or disables the display of the value on the gadget.

Value indicator properties

Value indicator properties control the size, color, and border of the value indicator in a bullet gadget, as shown in Figure 17-18.

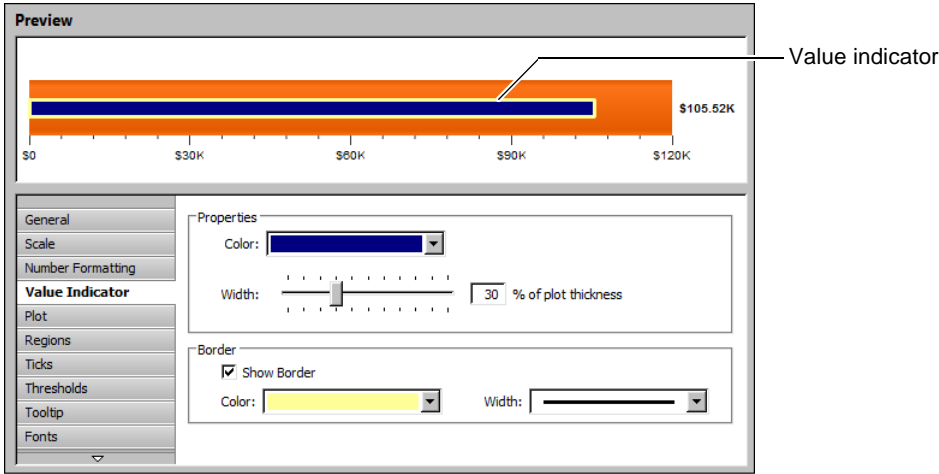


Figure 17-18 Examining a bullet gadget and its value indicator properties

Table 17-11 shows the value indicator properties. These properties are used only in a bullet gadget.

Table 17-11 Value indicator properties

Property	Gadget	Usage
Border Color	Bullet	Sets the color of the border
Border Width	Bullet	Sets the thickness of the border
Color	Bullet	Sets the color of the value indicator
Show Border	Bullet	Enables or disables a border around the value indicator
Width	Bullet	Sets the value indicator width as a percent of the plot thickness

Tooltip properties

Tooltip properties control the visibility and appearance of tooltips in a gadget. A tooltip displays a data value when the mouse pointer is placed over a value marker. Figure 17-19 shows a meter gadget that displays a tooltip and the properties set for the tooltip.

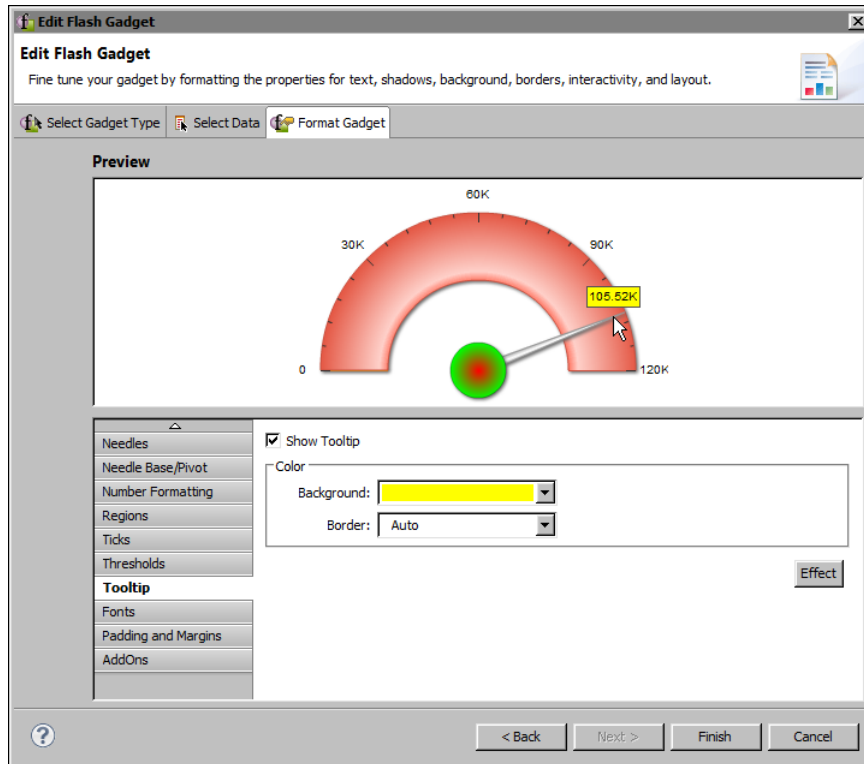


Figure 17-19 Format Gadget displaying a bullet gadget and its tooltip properties

Table 17-12 shows the tooltip properties. These properties are available to all the gadgets.

Table 17-12 Tooltip properties

Property	Usage
Show Tooltip	Enables and disables the display of a tooltip
Background	Sets the background color for the tooltip
Border	Sets the border color for the tooltip

Font properties

Font properties define the type, size, and color of the font used for any text in a gadget. Table 17-13 shows the font properties. These properties are available to all the gadgets.

Table 17-13 Font properties

Property	Usage
Font	Specifies the name of the font
Size	Specifies the font size in points
Color	Specifies the color of the text

Padding and margin properties

Padding and margin properties support the addition of space on all sides of a gadget, between a title and the plot, and between a data value and the plot. Compare the sparkline gadgets in Figure 17-20 and Figure 17-23. The gadget in Figure 17-20 uses default values for all the padding and margin properties.

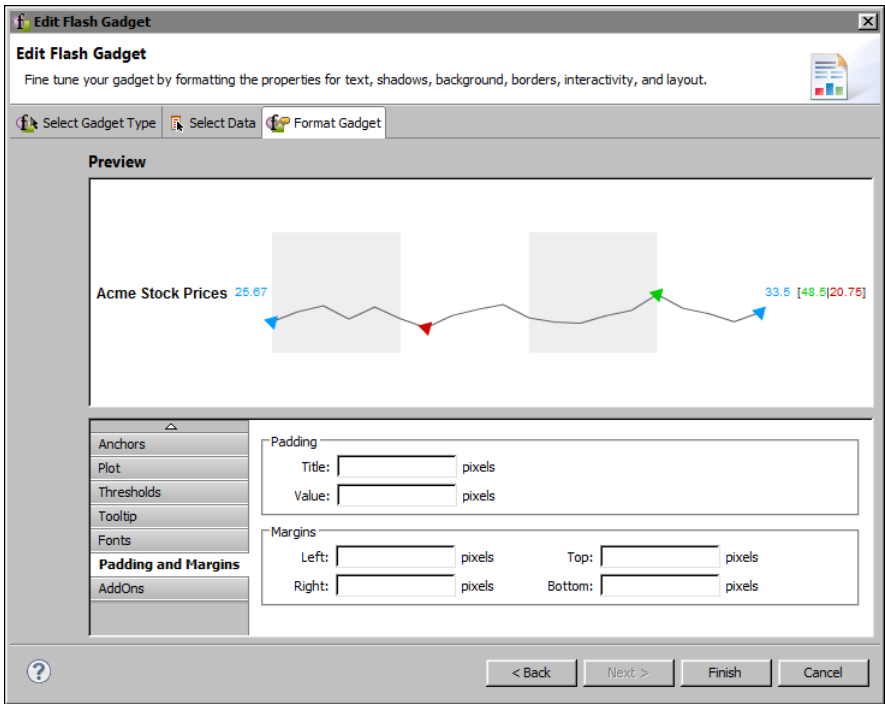


Figure 17-20 Format Gadget displaying a sparkline gadget and its default padding and margin property settings

The gadget in Figure 17-21 uses the margin and padding properties to add extra space between the elements in the gadget.

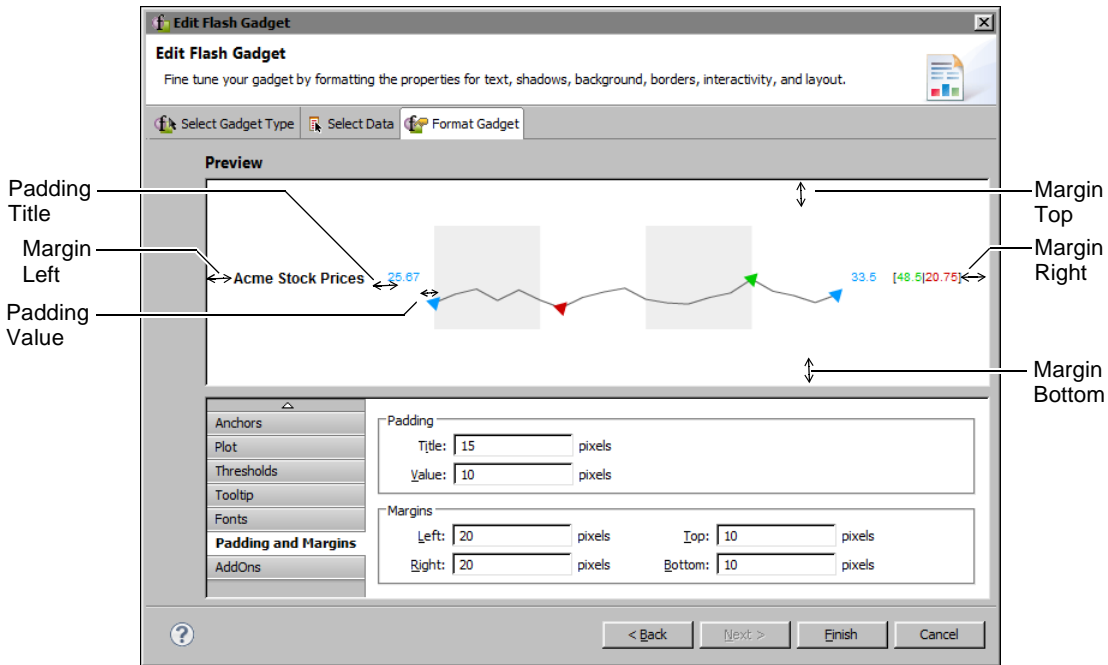


Figure 17-21 Format Gadget displaying a sparkline gadget that uses padding and margin properties to add extra space between elements

Table 17-14 shows the padding and margin properties.

Table 17-14 Padding and margin properties

Property	Gadget	Usage
Padding Title	Sparkline, bullet	Adds space, in pixels, between the title and the element next to it
Padding Value	All	Adds space, in pixels, between the data value and the element next to it
Margins Left, Right, Top, Bottom	All	Adds space, in pixels, around the entire gadget on the left, right, top and bottom sides

AddOn properties

AddOn properties support the creation of custom objects, called AddOns, to add to a gadget. You can add rectangles, polygons, circles, arcs, lines, text, and images

to any gadget to enhance its appearance. You can create any number of objects and arrange objects on top of or behind one another.

Figure 17-22 shows an example of adding two rectangles with rounded corners behind a meter gauge. To create this image, create one rectangle with a white border, then create another rectangle that is slightly larger. Use the same fill color for both rectangles. Place the larger rectangle behind the smaller rectangle.

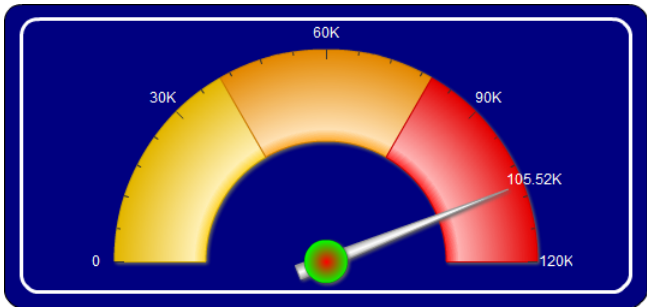


Figure 17-22 AddOn objects used to enhance a meter gadget

Figure 17-23 shows the AddOns page. AddOns lists the two rectangles added to the meter gauge. The objects are listed in z order, which is the order from front to back.

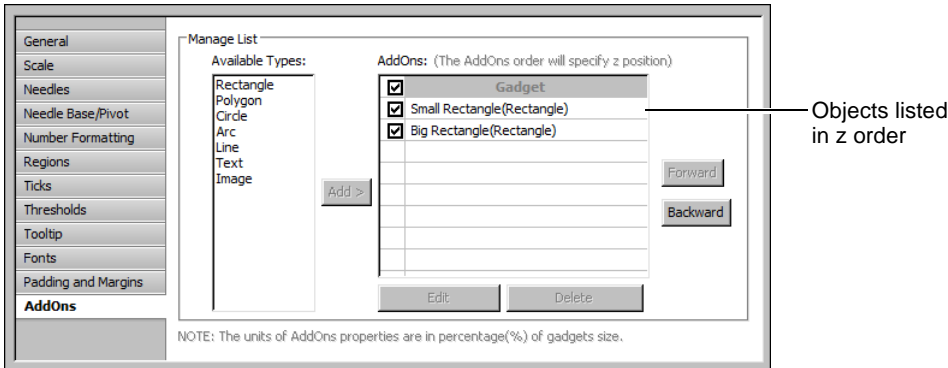


Figure 17-23 Format Gadget displaying a meter gauge and its AddOn properties

Figure 17-24 shows the properties set for the larger rectangle. Notice that the size of the rectangle is not fixed. Rather, the size is a percentage of the gadget's size. You define an AddOn's size by specifying values for these four properties: Start X coordinate, Start Y coordinate, End X coordinate, and End Y coordinate. By using a relative size, AddOns adjust to the size of the gadget area.

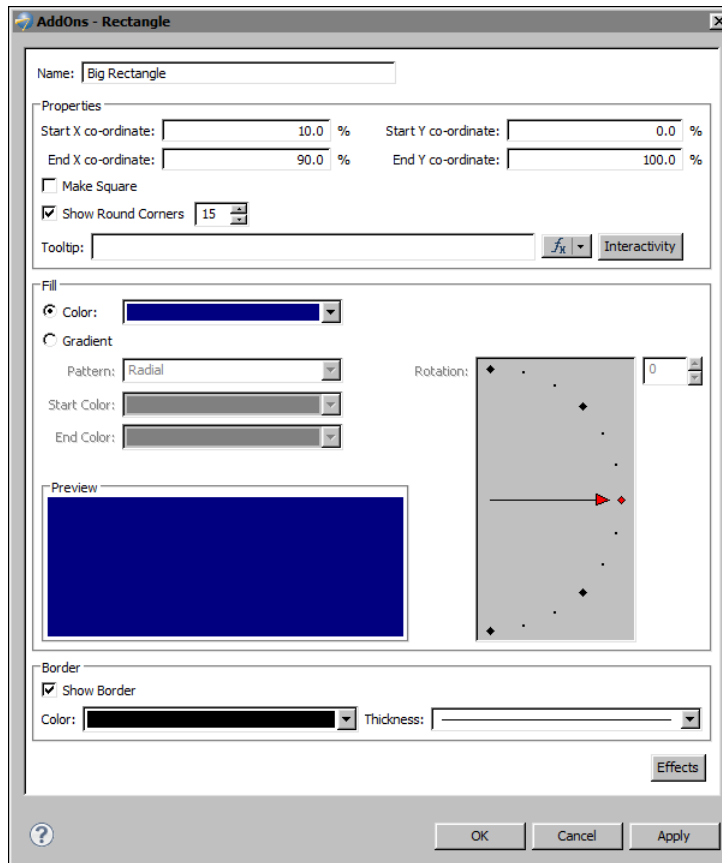


Figure 17-24 Properties of an AddOn object

Table 17-15 shows the properties for creating the different types of objects that you can add to a gadget.

Table 17-15 AddOn properties

Property	Object Type	Usage
Center X coordinate	Polygon, Circle, Arc	Specifies the location, as a percentage of the size of the gadget, of the <i>x</i> coordinate of the object.
Center Y Coordinate	Polygon, Circle, Arc	Specifies the location, as a percentage of the size of the gadget, of the <i>y</i> coordinate of the object.
Color	Line, Text	Specifies the color of the line.
Dash Gap	Line	Specifies the length of gaps between dashes, in pixels.
Dash Length	Line	Specifies the length of dashes, in pixels.

Table 17-15 AddOn properties (continued)

Property	Object Type	Usage
End Angle	Circle, Arc	Specifies the end angle of the object.
End Color	Rectangle, Polygon, Circle, Arc	Specifies the end color of the gradient fill.
End X coordinate	Rectangle	Specifies the location, as a percentage of the size of the gadget, of the end <i>x</i> value of the object.
End Y coordinate	Rectangle	Specifies the location, as a percentage of the size of the gadget, of the end <i>y</i> value of the object.
Font	Text	Specifies the font for the object. You can also select Bold, Italic, or Underline.
Font Size	Text	Specifies the font size in points.
Horizontal	Text	Supports the selection of horizontal text alignment within the gadget.
Inner Radius	Arc	Specifies the radius of the inner portion of the object, as a percent of the size of the gadget.
Gradient	Rectangle, Polygon, Circle, Arc	Select to have a gradient type of fill. Choose a Radial or Linear pattern.
Label	Text	Specifies the text that appears on the object.
Name	All	Specifies the name of the object. This name appears in the list on AddOns options.
Outer Radius	Arc	Specifies the radius of the outer portion of the object, as a percent of the size of the gadget.
Radius	Circle	Specifies the radius, as a percent of the gadget, of the object.
Rotation	Rectangle, Polygon, Circle, Arc	Specifies the rotation angle for the fill within the object.
Rotation Angle	Polygon	Specifies the rotation angle of the object.
Scale Image	Image	Enables or disables image scaling. Adjust the height and width of the image by percent.
Scale This Font	Text	Select to alter the size of the text. Adjust the scaling amount for width and height by percent.
Show as Dashed	Line	Enables or disables dashed lines.
Show Border	Rectangle, Polygon, Circle, Arc	Enables or disables the drawing of a border line around the object. Select the color and thickness of the border with the Color and Thickness drop-down menus.

(continues)

Table 17-15 AddOn properties (continued)

Property	Object Type	Usage
Show Round Corners	Rectangle	Enables or disables rounded corners. Type the percent of a circle to round the corner.
Sides	Polygon	Specifies the number of sides on the object.
Size	Polygon	Specifies the size, as a percent of the gadget, of the object.
Solid Color	Rectangle, Polygon, Circle, Arc	Select to use a solid fill color for the object. Select a color from the associated drop-down list box.
Start Angle	Circle, Arc	Specifies the beginning angle of the object.
Start Color	Rectangle, Polygon, Circle, Arc	Specifies the start color of the gradient fill.
Start X coordinate	Rectangle	Specifies the location, as a percentage of the size of the gadget, of the beginning <i>x</i> value of the object.
Start Y coordinate	Rectangle	Specifies the location, as a percentage of the size of the gadget, of the beginning <i>y</i> value of the object.
TextBox Background Color	Text	Specifies the background color of the text box.
TextBox Border Color	Text	Sets the border color of the text box.
Text Wrap	Text	Disables or enables text wrap. Choose, by percent of the gadget, the maximum height and width for the wrap.
Thickness	Line	Specifies the thickness of the line.
Transparent	Image	Specifies the amount of transparency, in percent, of the image.
URL	Image	Specifies the location of the image for AddOn file types of .gif, .jpg, .png, or .swf.
Vertical	Text	Supports the selection of vertical text alignment within the gadget.

Using animation and other visual effects

By default, every Flash chart and gadget animates the data plot, the part of the chart or gadget that represents the data. For example, the columns in a column chart grow vertically and horizontally, and the pie and doughnut charts rotate.

You can change the default animation and define custom animations and visual effects. The types of visual effects you can apply are shadow, glow, bevel, blur, and font.

When defining custom animations and visual effects, do the following:

- Select the part of the chart or gadget to animate or to apply a visual effect.
- Select the type or types of effects to apply and set their properties.

If a standard formatting property and an effect property are set for the same chart or gadget part, the effect property takes precedence. For example, if the font property and a font effect are set for the *x*-axis labels, the font effect is used.

Creating effects

There are two approaches to designing effects for a Flash chart or gadget. You can create one or both of the following effects:

- A specialized effect that applies to a single chart or gadget part
- A general purpose effect that applies to multiple parts of a chart or gadget

The first approach is typical. For example, you might create one animation effect that draws a chart's *x*-axis labels horizontally, and a second animation effect that draws *y*-axis labels vertically.

Use the second approach to apply the same animation or visual effects to more than one chart or gadget part. For example, to apply the same font properties to the legend title, *x*-axis labels, and *y*-axis labels, create an effect with the desired font properties, then apply this effect to the three chart parts. Whenever you need to change the font for these chart parts, you modify a single effect. This approach enables you to reuse and maintain common effects easily.

How to create an effect

- 1 Select the part of the chart or gadget to which to apply an effect. If the selected part supports effects, the Effects button appears.
- 2 Choose Effects. Effects shows the part of the chart or gadget selected for an effect. Figure 17-25 shows an example of X-Axis Labels selected for a Flash chart.

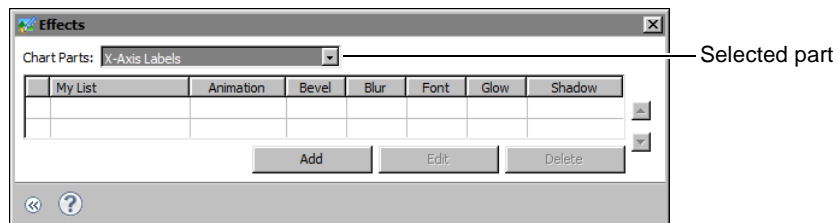


Figure 17-25 Effects displaying the chart part selected for an effect

- 3 To apply an effect to a different part of the chart or gadget, select a different part from the drop-down list.
- 4 Choose Add to create an effect.
- 5 In Add New Effect, type a name for the effect, then choose OK. Effect, shown in Figure 17-26, lists the types of effects that you can apply. Animation is selected by default.

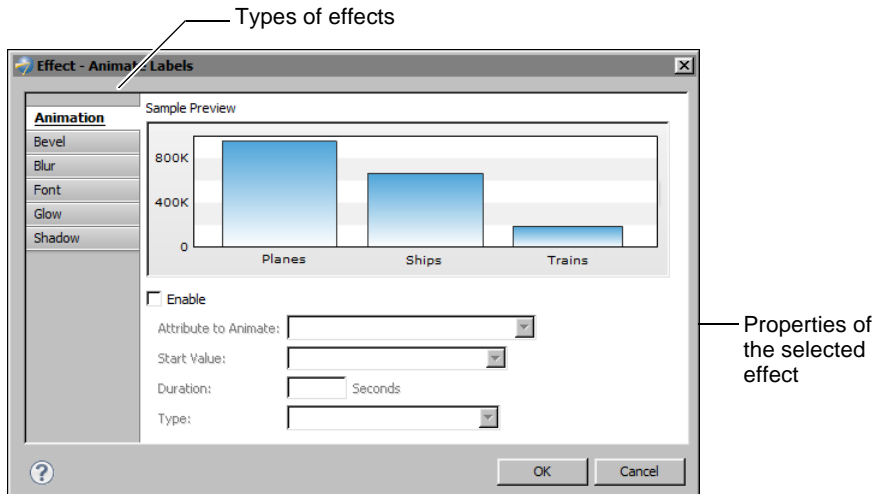


Figure 17-26 Types of effects that can be set for Flash object

- 6 Choose an effect type, then choose Enable.
- 7 Set the properties of the selected effect type. The properties of each effect type are described later in this chapter.
- 8 If desired, choose another effect type. For example, you can create an effect that uses the glow and shadow effect types.
- 9 Choose OK when you finish creating the effect. Effects displays information about the effect you created. Figure 17-27 shows an example.

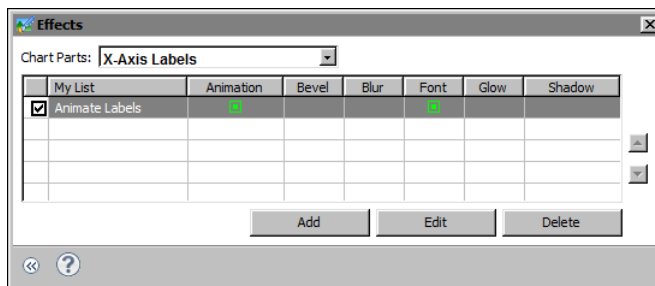


Figure 17-27 A defined effect named Animate Labels

My List shows an effect named Animate Labels. The check mark indicates that the effect applies to X-Axis Labels. The symbol under Animation and Font indicates that the Animate Labels effect uses animation and font effects.

For specific examples of creating effects, see the tutorials later in this chapter.

How to apply an effect to multiple parts in a chart or gadget

This procedure assumes that you have already created the effect.

- 1 Select the part of the chart or gadget to which to apply an existing effect, then choose Effects. Alternatively, choose Effects for any part that currently appears in the Format Chart or Format Gadget page. The point is to open the Effects dialog.

Effects lists all the effects defined for the Flash chart or gadget.

- 2 In Effects, in Chart Parts (for a Flash chart) or Effect Target (for a Flash gadget), select the item to which to apply an effect, if necessary.
- 3 Under My List, select the effect to apply by clicking the check box next to the effect. Figure 17-28 shows an example of the Highlight effect selected for the needle in a Flash gauge.

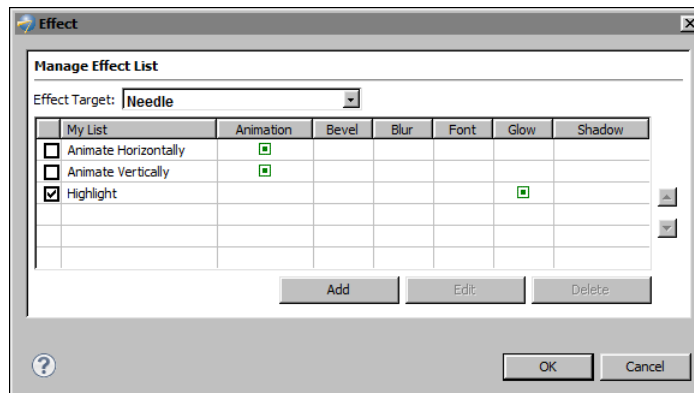


Figure 17-28 Applying an effect to a Flash object's needle

Managing effects

A single Flash chart or gadget can use any number of effects. The Effects dialog box, shown in Figure 17-28, shows all the effects created for a chart or gadget. In this dialog box, aside from creating a new effect as described previously, you can perform the following tasks:

- See which parts of the chart or gadget have effects applied. Open the drop-down list next to Chart Part or Effect Target. Items that have effects applied appear in bold.

- See which parts of the chart or gadget a particular effect applies to. Under My List, hover the mouse pointer over an effect. A tooltip displays the name of the chart or gadget part that uses the effect. For example, the following tooltip indicates that an effect applies to a chart's *y*-axis labels and title:

Target: Y-Axis Labels, Title

- Edit an effect. Under My List, select the effect, then choose Edit.
- Delete an effect. Under My List, select the effect, then choose Delete.

Animation effect

Using the animation effect, you can animate different parts of a chart or gadget, including the background, title, data plot, data values, *x*-axis labels, *y*-axis labels, and more. After selecting the object to animate, you set properties to define how the object moves, including the direction, pattern, and duration of the animation.

For example, you can animate the data plot of a column chart so that the columns are drawn from the left side of the chart to the right side in five seconds, with a bouncing motion at the end. Figure 17-29 shows the properties set to create this type of animation. The Attribute to Animate value of X coordinate specifies that the *x* (horizontal) position of the plot is animated. The Start Value setting of Chart Start X specifies that the animation starts from the left side of the chart.

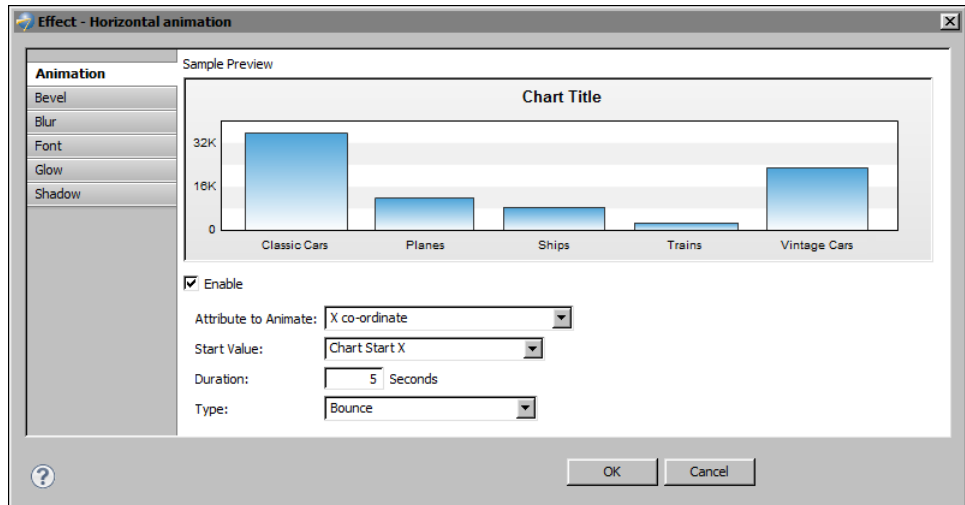


Figure 17-29 Definition of an animation effect

Table 17-16 describes the animation properties.

Table 17-16 Animation properties

Property	Description
Attribute To Animate	Specifies the property of the object to animate as described in Table 17-17. Each attribute produces different movements. Not all attributes apply to all chart objects. For example, the rotation attribute applies only to the data plot of a pie and doughnut chart.
Duration	Specifies the duration of animation in seconds.
Start Value	Specifies the start position of the animation. Either specify a fixed pixel location or select a macro. Macros are useful for setting a start <i>x</i> or <i>y</i> position at the start, center, or end position of chart. Without a macro, such as Chart Center X, you would have to experiment with many <i>x</i> values to find the center of the chart. Macros are described in Table 17-18.
Type	Specifies the type of animation as described in Table 17-19. The animation type determines acceleration and deceleration during animation. For example, a chart object might gradually increase its speed near the beginning of an animation, but slow down at the end of the animation.

Table 17-17 describes the attributes of a chart part, or object, that you can animate.

Table 17-17 Animation attributes

Attribute	Description
Horizontal Scale	Animates the <i>x</i> (horizontal) scale of the object. For example, for the data plot of a column chart, the columns are animated to grow widthwise.
Rotation	Animates pie and doughnut charts in a circular motion.
Transparency	Specifies alpha transition, or transparency fading.
Vertical Scale	Animates the <i>y</i> (vertical) scale of the object. For example, for the data plot of a column chart, the columns are animated to grow in height.
X coordinate	Animates the <i>x</i> position of the object.
Y coordinate	Animates the <i>y</i> position of the object.

Table 17-18 describes the macros that you can select for the Start Value property described in Table 17-16. Chart refers to the entire area of the Flash chart or gadget. Canvas refers to the plot area.

Table 17-18 Animation Start Value macros

Macro	Description
Chart Start X	The start x position of the chart, which is equal to 0
Chart Start Y	The start y position of the chart, which is equal to 0
Chart Width	The width of the chart
Chart Height	The height of the chart
Chart End X	The end x position of the chart, which is the same as the chart width
Chart End Y	The end y position of the chart, which is the same as the chart height
Chart Center X	The center x position of the chart
Chart Center Y	The center y position of the chart
Canvas Start X	The start x position of the canvas, which is the x coordinate of the left side of the canvas
Canvas Start Y	The start y position of the canvas, which is the y coordinate of the top of the canvas
Canvas Width	The width of the canvas
Canvas Height	The height of the canvas
Canvas End X	The canvas end x position, which is the x coordinate of the right side of the canvas
Canvas End Y	The canvas end y position, which is the y coordinate of the bottom of the canvas
Canvas Center X	The center x position of the canvas
Canvas Center Y	The center y position of the canvas

Table 17-19 describes the type of animation that you can select for the Type property described in Table 17-16.

Table 17-19 Animation types

Type	Description
Bounce	Adds a bouncing motion at the end of the animation. The number of bounces relates to the duration. Longer durations produce more bounces.
Elastic	Adds an elastic motion at the end of the animation. The range of motion is larger than that of the bounce. The amount of elasticity is unaffected by duration.
Linear	Adds a smooth movement from start to end of the animation without any changes in speed.

Table 17-19 Animation types

Type	Description
Regular	Adds slower movement at the end of the animation.
Strong	Adds an effect similar to regular, but the effect is more pronounced.

Bevel effect

Use the bevel effect to create bevels on chart and gadget objects. This effect is typically applied to a data plot, as shown in Figure 17-30. As the figure shows, the bevel makes the pie chart appear more three-dimensional. By setting properties, you can control the angle, depth, and color of the bevel.

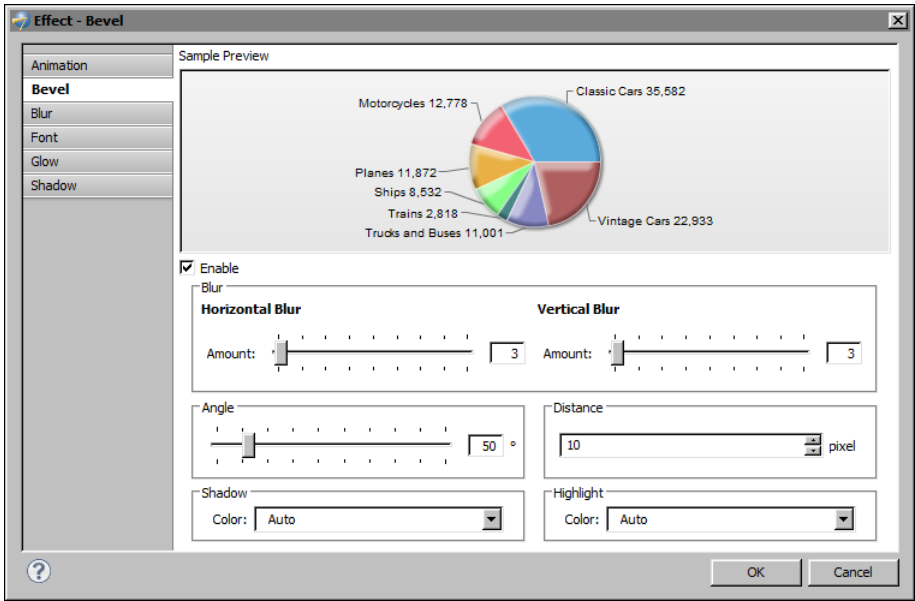


Figure 17-30 Definition of a bevel effect

Table 17-20 describes the bevel properties.

Table 17-20 Bevel properties

Property	Description
Angle	Specifies the angle of the bevel. Values are 0 to 360 degrees.
Distance	Specifies the offset distance of the bevel. Values are in pixels.
Highlight	Specifies the color of the highlight portion of the bevel.

(continues)

Table 17-20 Bevel properties (continued)

Property	Description
Horizontal Blur	Specifies the amount of horizontal blur in pixels.
Shadow	Specifies the color of the shadow portion of the bevel.
Vertical Blur	Specifies the amount of vertical blur in pixels.

Blur effect

Use the blur effect to blur a chart or gadget object. Figure 17-31 shows this effect applied to the gauge of a linear gadget.

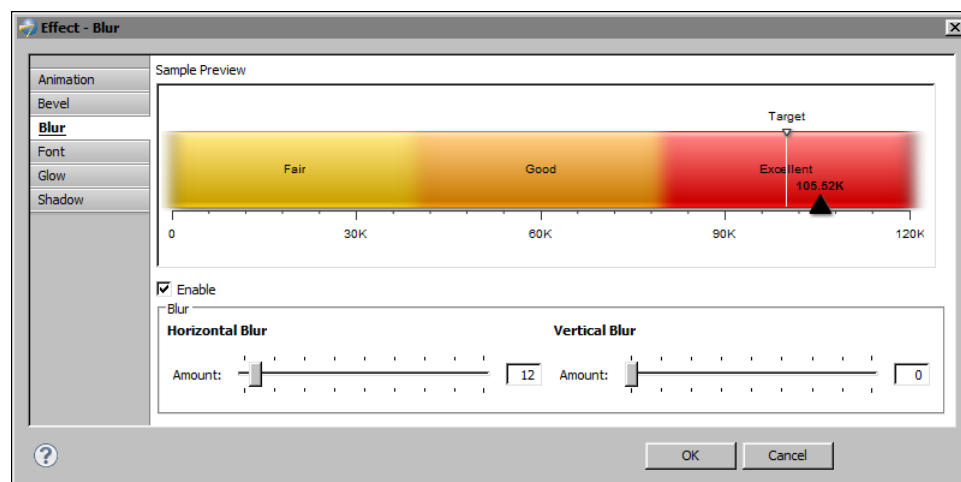


Figure 17-31 Definition of a blur effect

Table 17-21 describes the blur properties.

Table 17-21 Blur properties

Property	Description
Horizontal Blur	Specifies the amount of horizontal blur in pixels
Vertical Blur	Specifies the amount of vertical blur in pixels

Font effect

By default, all text in a Flash chart and gadget appear in the same font. Use the font effect to apply different fonts to different text objects. For example, you can use one font for the axes labels and another for the legend labels.

Table 17-22 describes the font effect properties.

Table 17-22 Font effect properties

Property	Description
Background color	Sets the background color for the text box
Bold	Sets text to bold
Border color	Creates a border around the text of specified color
Color	Sets the font color
Font	Sets the font family for the text
Italic	Sets text to italic
Size	Specifies the font size
Underline	Sets text to underline

Glow effect

Use the glow effect to add a glowing outline around a chart or gadget object. Figure 17-32 shows this effect applied to the data plot of a pie chart.

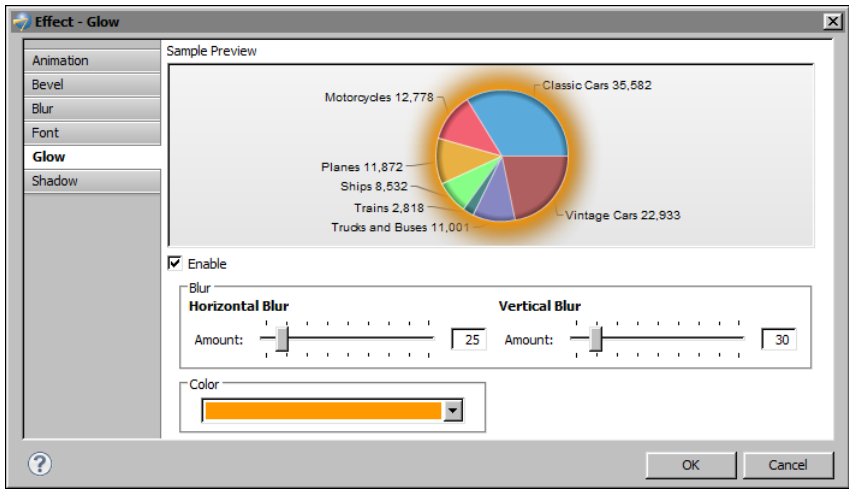


Figure 17-32 Definition of a glow effect

Table 17-23 describes the glow effect properties.

Table 17-23 Glow properties

Property	Description
Color	Specifies the color of the glow
Horizontal Blur	Specifies the amount of horizontal blur in pixels
Vertical Blur	Specifies the amount of vertical blur in pixels

Shadow effect

Use the shadow effect to add a shadow to a chart or gadget object. Figure 17-33 shows this effect applied to the data plot of a pie chart.

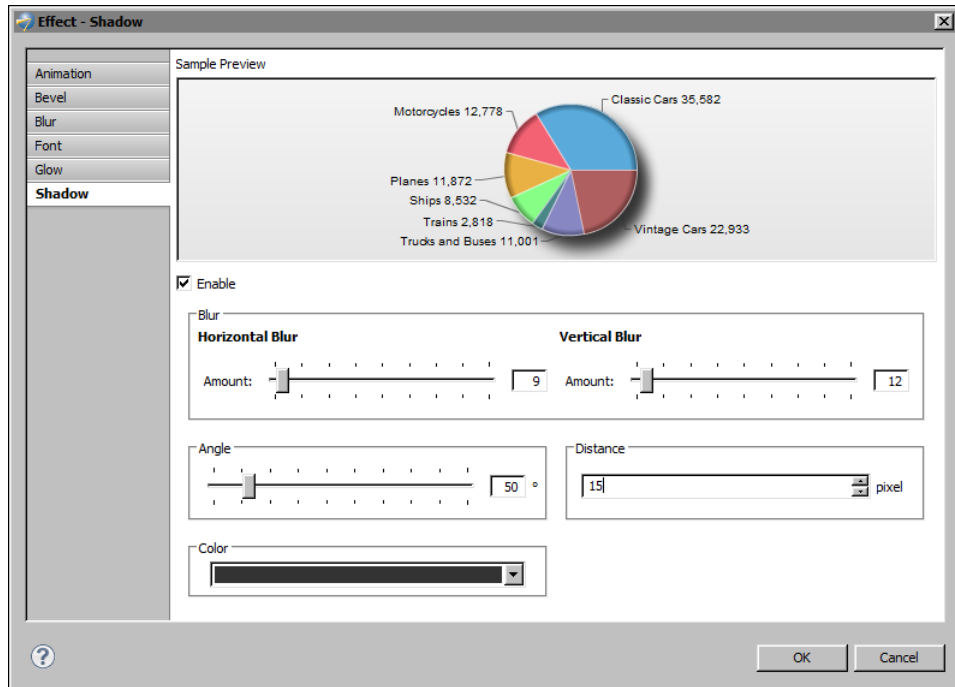


Figure 17-33 Definition of a shadow effect

Table 17-24 describes the shadow effect properties.

Table 17-24 Shadow properties

Property	Description
Angle	Specifies the angle of the shadow. Valid values are from 0 to 360 degrees.
Color	Specifies the color of the shadow.
Distance	Specifies the offset distance for the shadow in pixels.
Horizontal Blur	Specifies the amount of horizontal blur in pixels.
Vertical Blur	Specifies the amount of vertical blur in pixels.

Tutorial 1: Creating a Flash chart

This tutorial provides step-by-step instructions for building a report that uses an animated Flash column chart to display sales by product line. You perform the following tasks:

- Create a new report.
- Build a data source.
- Build a data set.
- Add a Flash chart to the report.
- Select data for the Flash chart.
- Animate the *x*-axis labels.
- Animate the *y*-axis labels.
- Change the animation effect of the columns.

Task 1: Create a new report

This task assumes you have already created a project for your reports.

- 1 Choose File→New→Report.
- 2 In Select Project, select the project in which to create the report, then choose Next.
- 3 In New Report, type the following text as the file name:
`ProductLineSales.rptdesign`
- 4 Choose Finish. A blank report appears in the layout editor.

Task 2: Build a data source

In this procedure, create a data source to connect to the Classic Models sample database.

- 1 Choose Data Explorer.
- 2 Right-click Data Sources, and choose New Data Source from the context menu.
- 3 Select Classic Models Inc. Sample Database from the list of data sources. Use the default data source name, then choose Next. Connection information about the new data source appears.
- 4 Choose Finish. The new data source appears under Data Sources in Data Explorer.

Task 3: Build a data set

In this procedure, build a data set to indicate what data to retrieve from the OrderDetails and Products table.

1 In Data Explorer, right-click Data Sets, and choose New Data Set.

2 In New Data Set, in Data Set Name, type the following text:

SalesTotals

Use the default values for the other fields.

- Data Source Selection shows the name of the data source that you created earlier.
- Data Set Type specifies that the data set uses a SQL SELECT query to retrieve the data.

3 Choose Next.

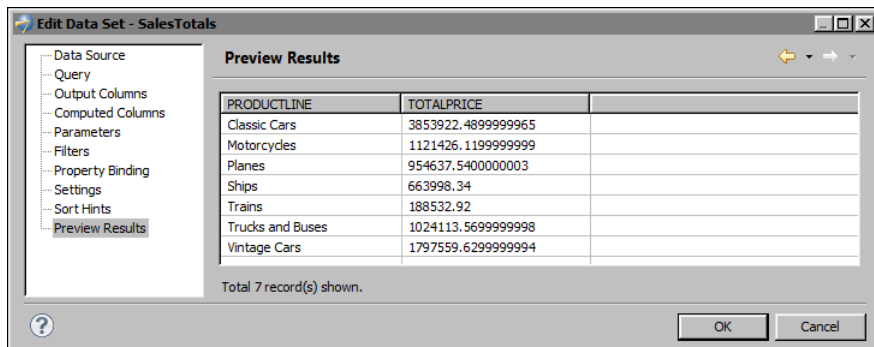
4 In New Data Set—Query, type the following SQL SELECT statement to indicate what data to retrieve:

```
select Products.ProductLine,  
sum(OrderDetails.QuantityOrdered * OrderDetails.PriceEach) as  
    TotalPrice  
from OrderDetails, Products  
where products.productcode = orderdetails.productcode  
group by products.productline  
order by products.productline
```

This statement calculates the total sales amount for each product line.

5 Choose Finish to save the data set. Edit Data Set displays the columns specified in the query, and provides options for editing the data set.

6 Choose Preview Results. Figure 17-34 shows the data rows that the data set returns.



PRODUCTLINE	TOTALPRICE
Classic Cars	3853922.4899999965
Motorcycles	1121426.1199999999
Planes	954637.5400000003
Ships	663998.34
Trains	188532.92
Trucks and Buses	1024113.5699999998
Vintage Cars	1797559.6299999994

Figure 17-34 SalesTotals data set preview

7 Choose OK.

Task 4: Add a Flash chart to the report

Use the palette to insert a Flash chart, then select a chart type.

- 1 Choose Palette, then drag the Flash Chart element from the palette to the blank report design. The Flash chart builder opens and displays the Select Chart Type page, as shown in Figure 17-35.

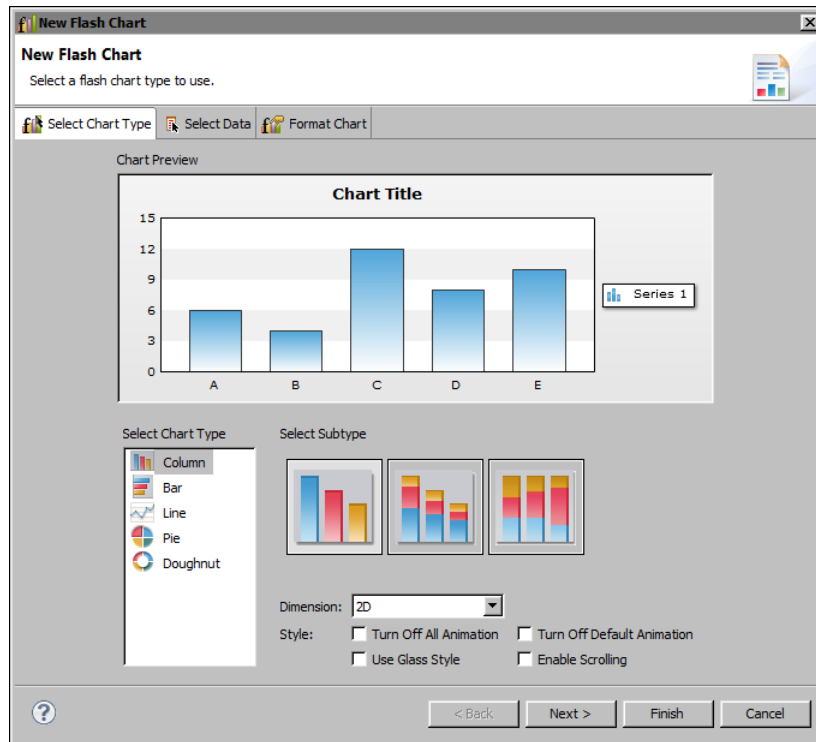


Figure 17-35 Flash chart builder displaying the Select Chart Type page

- 2 Create a column chart, using the default values for all the properties.

Task 5: Select data for the Flash chart

In this procedure, select the data to present in the chart.

- 1 In the Flash chart builder, choose Next to display the Select Data page.

On this page, under Select Data, Use Data From is selected by default and its value is set to SalesTotals, the data set you created earlier. Data Preview shows the columns and values returned by the data set.

- 2 In Data Preview, select the PRODUCTLINE column header and drag it to the empty field to the right of Category (X) Series, as shown in Figure 17-36.
- 3 Select the TOTALPRICE column header and drag it to the empty field in Value (Y) Series, as shown in Figure 17-36.

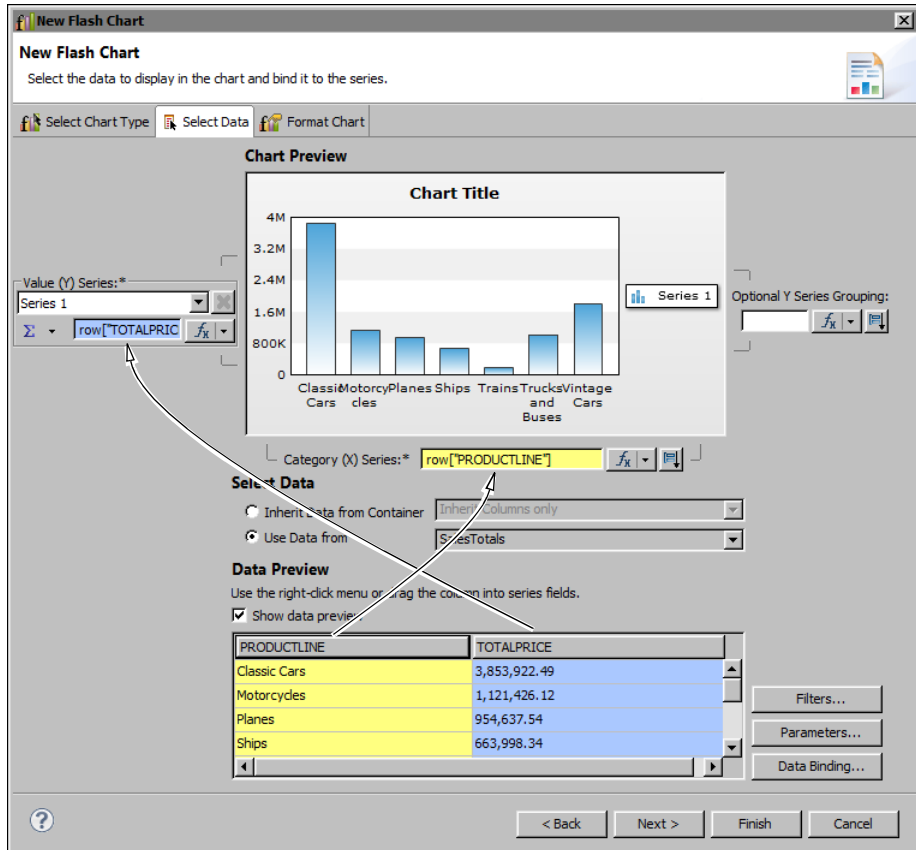


Figure 17-36 Specifying the data to use for the category and value series

The image in Chart Preview changes to use the specified data.

- 4 Before formatting the Flash chart, preview the chart.
 - 1 Choose Finish to close the Flash chart builder.
 - 2 In the layout editor, enlarge the Flash chart. Increase its width to seven inches, and increase its height to three inches.
 - 3 Run→View Report→In Web Viewer.

The Flash chart is animated. Columns are drawn linearly from the bottom to the top. Figure 17-37 shows the generated chart.

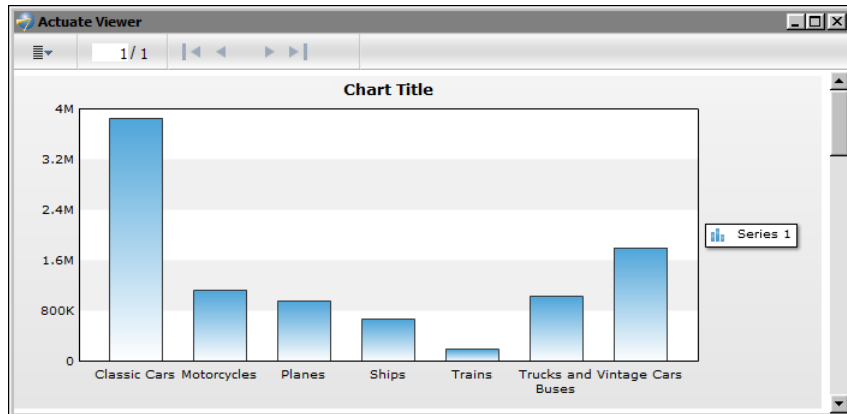


Figure 17-37 Preview of the Flash chart

5 Close the viewer.

Task 6: Animate the x-axis labels

In this procedure, animate *x*-axis labels to draw them linearly from left to right.

- 1 Double-click the Flash chart to open the Flash chart builder.
- 2 Choose Format Chart.
- 3 Choose X-Axis in Chart Area, shown in Figure 17-38. Then, choose Effects.

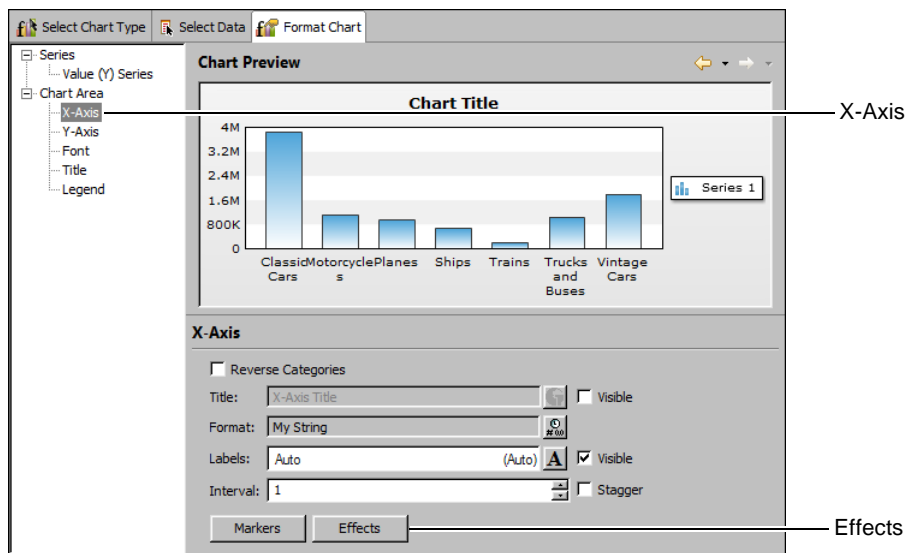


Figure 17-38 Select X-Axis and Effects to apply animation to x-axis labels

In Effects, Chart Parts displays X-Axis Labels, indicating that is the part of the chart selected for an effect.

- 4 Choose Add to create an effect.
- 5 In Add New Effect, type the following text as the name of the effect, then choose OK:

Animate Horizontally

In Effect—Animate Horizontally, Animation is selected by default.

- 6 Specify the following animation values, as shown in Figure 17-39:

- Select Enable.
- In Attribute to Animate, select X co-ordinate.
- In Start Value, select Canvas Start X.
- In Duration, type 3.
- In Type, select Linear.

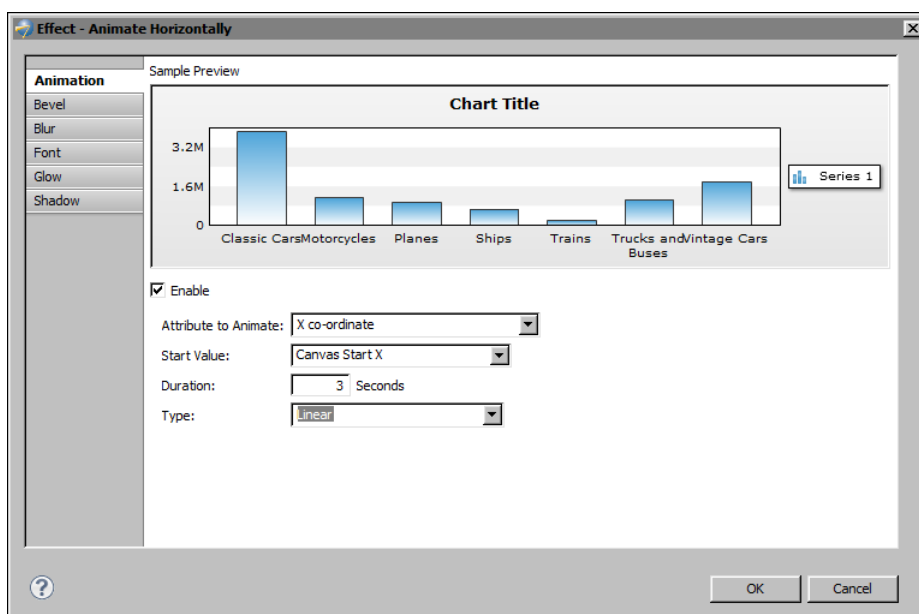


Figure 17-39 Animation values specified for the Animate Horizontally effect

- 7 Choose OK to save the effect.

In Effects, shown in Figure 17-40, My List shows Animate Horizontally, the effect you just created. The check mark indicates that the effect applies to X-Axis Labels. A symbol under Animation indicates that the effect uses animation.

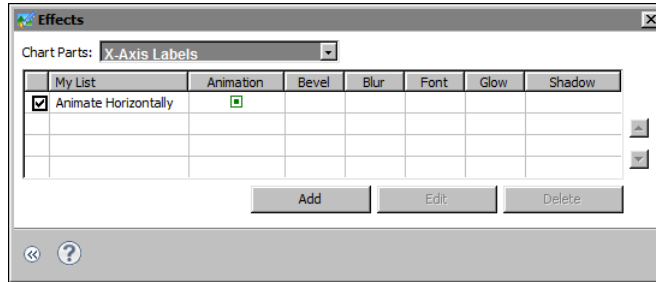


Figure 17-40 Effects lists the Animate Horizontally effect

Task 7: Animate the y-axis labels

In this procedure, animate the y-axis labels to display them from top to bottom with a bouncing movement.

- 1 In Effects, in Chart Parts, select Y-Axis Labels.
- 2 Choose Add to create a new effect.
- 3 In Add New Effect, type the following text as the name of the effect, then choose OK:

Animate Vertically

- 4 Specify the following animation values:
 - Select Enable.
 - In Attribute to Animate, select Y co-ordinate.
 - In Start Value, select Chart Start Y.
 - In Duration, type 3.
 - In Type, select Bounce.
- 5 Choose OK to save the effect.

Task 8: Change the animation effect of the columns

As you saw earlier, the default animation for a column chart is the drawing of columns vertically from bottom to top. In this procedure, animate the columns to grow in both height and width.

- 1 In Effects, in Chart Parts, select Data Plot.
- 2 Choose Add to create a new effect.
- 3 In Add New Effect, type the following text as the name of the effect, then choose OK:

Animate Columns

- 4 Specify the following animation values:
 - Select Enable.
 - In Attribute to Animate, select Horizontal Scale
 - In Start Value, select Canvas Start X.
 - In Duration, type 3.
 - In Type, select Linear.
- 5 Choose OK to save the effect.

In Effects, the Animate Columns effect is added to the list, as shown in Figure 17-41.

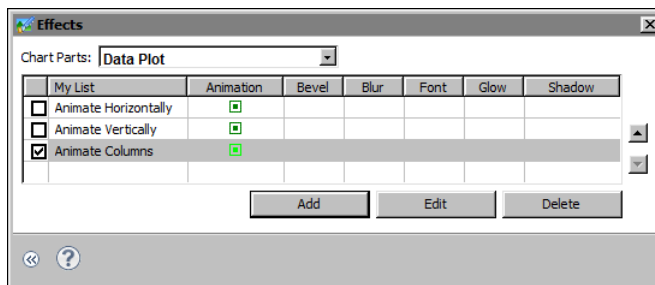


Figure 17-41 Effects listing the three effects created

- 6 Close Effects, then choose Finish to close the Flash chart builder.
- 7 View the report in the web viewer.

Tutorial 2: Creating a Flash gadget

This tutorial provides step-by-step instructions for creating an animated Flash gadget to display a sales grand total. This tutorial continues with the report built in the previous tutorial, which used a Flash chart to display sales totals by product line. The Flash gadget in this tutorial uses the data from the data set created in the previous tutorial. If you want to skip creating the Flash chart in the previous tutorial, set up the data required by the Flash gadget by running through the following tasks from the previous tutorial:

- Task 1: Create a new report
- Task 2: Build a data source
- Task 3: Build a data set

This tutorial covers the following tasks:

- Add a Flash gadget to the report.

- Select data for the linear gauge.
- Divide the data area into regions.
- Add thresholds.
- Animate the region labels.

Task 1: Add a Flash gadget to the report

- 1 Choose Palette, then drag the Flash Gadget element from the palette and drop it in the report, above the Flash chart. The Flash gadget builder opens and displays the Select Gadget Type page, as shown in Figure 17-42.

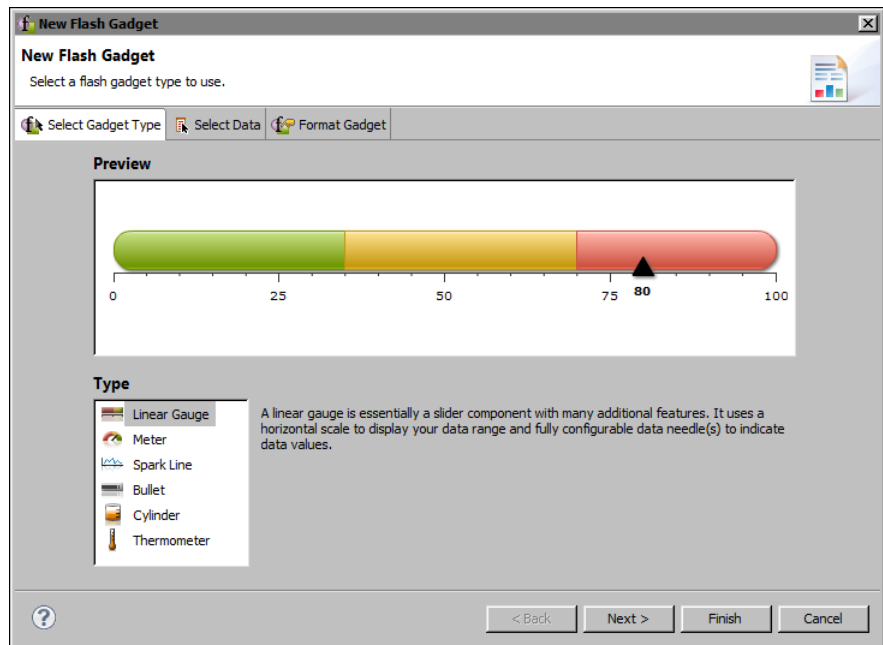


Figure 17-42 Flash gadget builder displaying the Select Gadget Type page

- 2 Create a linear gauge, the gadget selected by default.

Task 2: Select data for the linear gauge

In this procedure, specify the data to present in the gauge.

- 1 In the Flash gadget builder, choose Next to display the Select Data page.

On this page, under Select Data, Use Data From is selected by default and its value is set to SalesTotals, the data set you created earlier. Data Preview shows the columns and values returned by the data set.

- 2 In Data Preview, select the TOTALPRICE column header and drag it to the empty field in Value Definition, as shown in Figure 17-43.

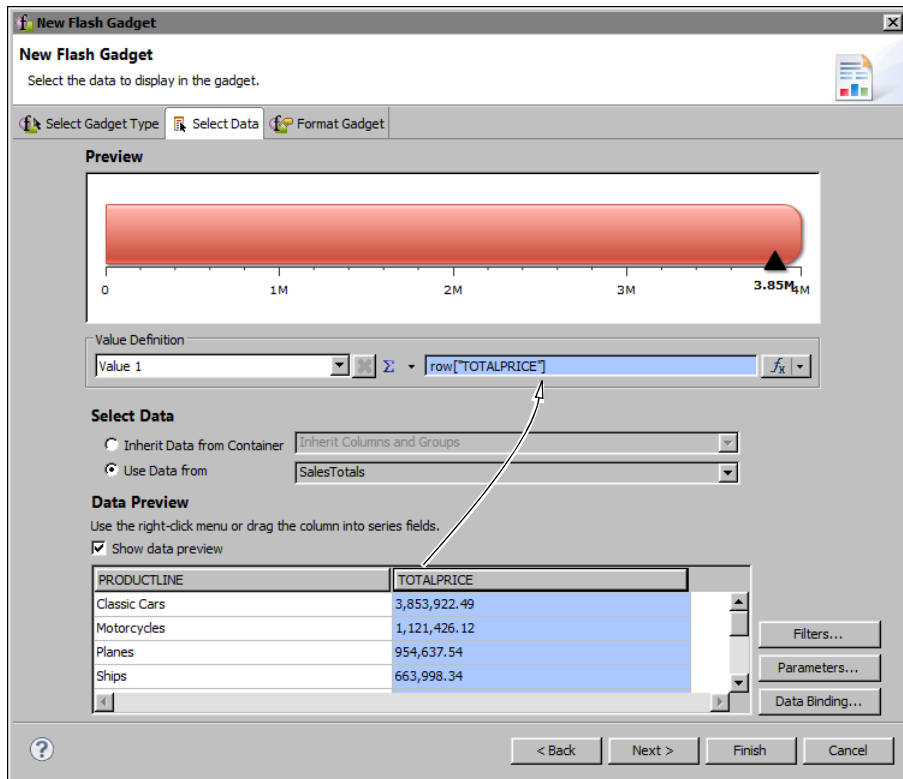


Figure 17-43 Specifying the data to use for the gauge value

The gauge in Preview changes to use the specified data. The needle shows a value of 3.85M, which is the total for Classic Cars, the value in the first row returned by the data set.

- 3 Specify that the gauge display the sum of sales across all product lines.
 - 1 Click the down arrow button next to the sigma (Σ) symbol.
 - 2 In Aggregate Expression, select Sum, then choose OK.

In Preview, the needle now shows a value of 9.6M.
- 4 Before formatting the gauge, preview the report.
 - 1 Choose Finish to close the Flash gadget builder.
 - 2 In the layout editor, resize the gauge. Increase its width to 7 inches, and decrease its height to 1.5 inches.

- 3 Choose Run→View Report→In Web Viewer. The gauge is animated. The gauge is drawn linearly from the left to the right, and the needle moves from the left edge of the gauge to its final position.

Task 3: Divide the data area into regions

In this procedure, divide the data area into three regions labeled Fair, Good, and Excellent.

- 1 In the layout editor, double-click the gauge to open the Flash gadget builder.
- 2 Choose Format Gadget.
- 3 Choose Regions from the list of options. Figure 17-44 shows the default region properties. There are three predefined regions: A, B, and C. A is selected by default.

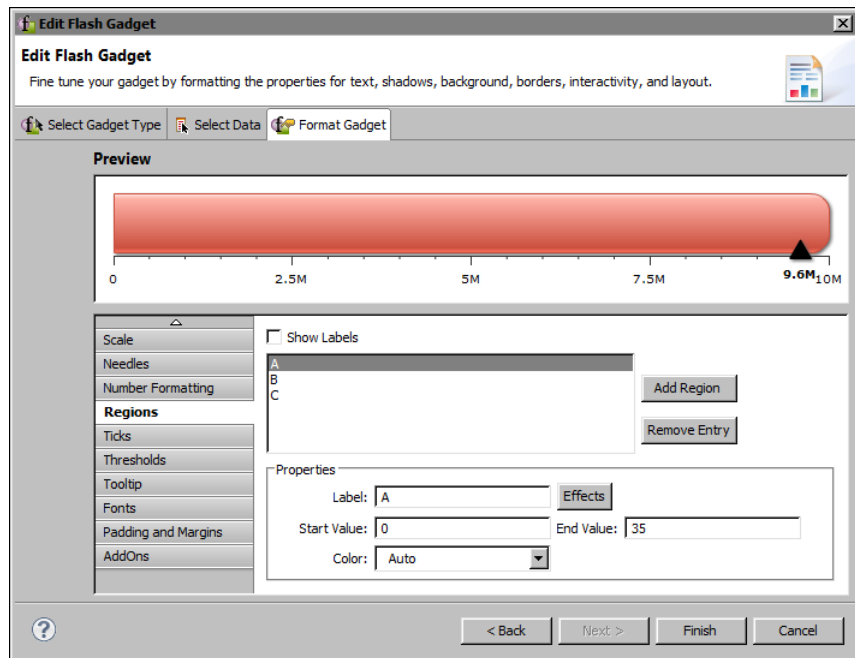


Figure 17-44 Format Gadget page displaying default region properties

- 4 In Properties, change the properties of region A as follows:
 - 1 In Label, type:
Fair
 - 2 In Start Value, use the default value 0.
 - 3 In End Value, type 3,000,000.

- 4 In Color, select a red color.
- 5 Select B, then set its properties as follows:
 - 1 In Label, type:
Good
 - 2 In Start Value, type 3,000,000.
 - 3 In End Value, type 7,500,000.
 - 4 In Color, select a yellow color.
- 6 Select C, then set its properties as follows:
 - 1 In Label, type:
Excellent
 - 2 In Start Value, type 7,500,000.
 - 3 In End Value, type 10,000,000.
 - 4 In Color, select a green color.

Preview shows the data area of the gauge divided into three regions, as shown in Figure 17-45. The regions appear in the specified colors, but the region labels do not appear.

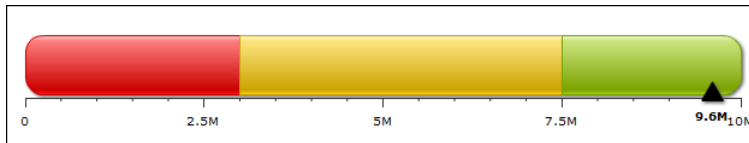


Figure 17-45 Gauge displaying three regions

- 7 Select Show Labels to display the region labels. The gauge displays Fair, Good, and Excellent in the corresponding regions, as shown in Figure 17-46.

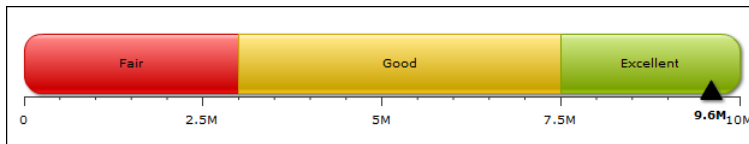


Figure 17-46 Gauge displaying region labels

Task 4: Add thresholds

In this procedure, add two threshold points to represent nominal and target sales values.

- 1 Choose Thresholds from the list of options.
The page displays the properties for a predefined threshold, Threshold1.

2 Change the properties of Threshold1 as follows:

- 1 In Properties—Label, type:
Nominal
- 2 In Start Value, type 2,500,000
- 3 In Marker, select Show Marker.

In Preview, the gauge displays a threshold line that displays the Nominal label above the marker.

- 3 Create a new threshold. In the drop-down list that displays the text Threshold1, click the down arrow button, then choose <New Threshold...>.
- 4 Set the properties of Threshold2 as follows:

- 1 In Properties—Label, type:
Target
- 2 In Start Value, type 8,000,000.
- 3 In Marker, select Show Marker.

The gauge displays the Target threshold. Figure 17-47 shows the gauge with the two thresholds added.

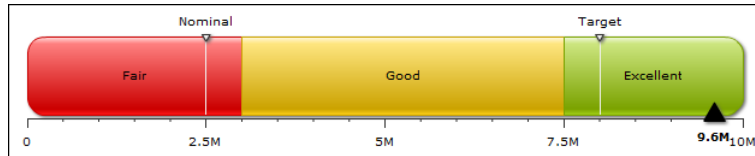


Figure 17-47 Gauge displaying thresholds

Task 5: Animate the region labels

In this procedure, animate the region labels to move from the left of the gauge to their final positions.

- 1 Choose Regions.
- 2 In Properties, Choose Effects, next to the Label property value. In Effects, Effect Target displays Gauge Labels, indicating that is the part of the gadget selected for an effect.
- 3 Choose Add to create an effect.
- 4 In Add New Effect, type the following text as the name of the effect, then choose OK:

Animate Horizontally

In Effect—Animate Horizontally, Animation is selected by default.

5 Specify the following animation values, as shown in Figure 17-48:

- Select Enable.
- In Attribute to Animate, select X co-ordinate.
- In Start Value, select Chart Start X.
- In Duration, type 3.
- In Type, select Linear.

When you finish specifying the values, Sample Preview shows the animation.

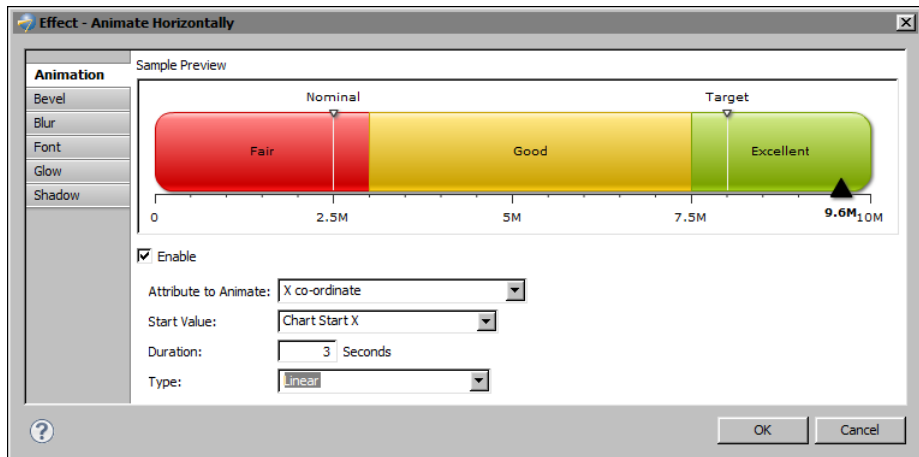


Figure 17-48 Animation values specified for the Animate Horizontally effect

6 Choose OK to save the effect.

In Effects, shown in Figure 17-49, My List shows Animate Horizontally, the effect you just created. The check mark indicates that the effect applies to Gauge Labels. A symbol under Animation indicates that the effect uses animation.

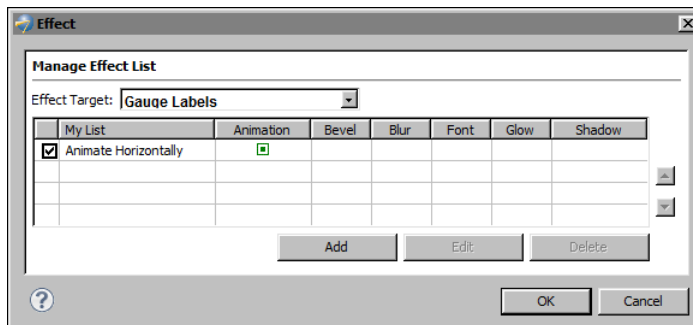


Figure 17-49 Effects lists the Animate Horizontally effect

Task 6: Animate the sales value

In this procedure, animate the sales value to move it from the top of the gauge to its final position above the needle.

- 1 In Effects, in Effect Target, select Value.
- 2 Choose Add to create a new effect.
- 3 In Add New Effect, type the following text as the name of the effect, then choose OK:

Animate Vertically

- 4 Specify the following animation values:
 - Select Enable.
 - In Attribute to Animate, select Y co-ordinate.
 - In Start Value, select Chart Start Y.
 - In Duration, type 2.
 - In Type, select Linear.
- 5 Choose OK to save the effect, then choose OK to close Effect.
- 6 Display the sales value above the needle.
 - 1 In the Format Gadget page, choose General.
 - 2 In Properties, next to Show Needle Value, select Above Needle.

Task 7: Add a glow effect to the needle

In this procedure, highlight the needle by adding a glow effect.

- 1 Choose Needles from the list of options, then choose Effects.
- 2 In Effects, choose Add to create a new effect.
- 3 In Add New Effect, type the following text as the name of the effect, then choose OK:

Highlight

- 4 In Effect—Highlight, choose Glow.
- 5 Specify the following glow values:
 - Select Enable.
 - Use the default values for Horizontal Blur, Vertical Blur, and Color.
- 6 Choose OK to save the effect, then choose OK to close Effect.
- 7 Choose Finish to save the formatting changes to the gauge.

- 8 Preview the report in the web viewer. The gauge should look like the one in Figure 17-50.

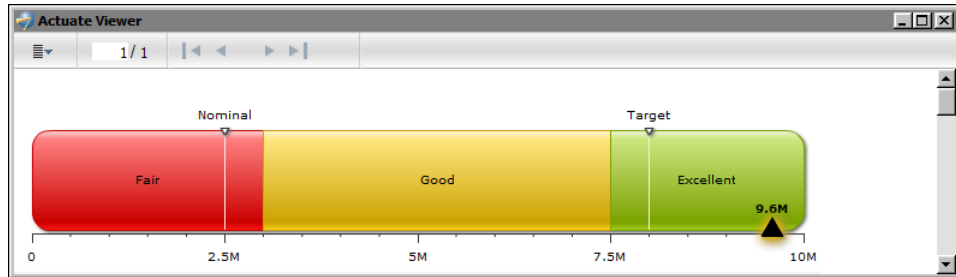


Figure 17-50 Preview of finished Flash gadget

Limitations

Due to certain aspects of using Flash objects with Actuate BIRT, there are situations where the Flash object does not work as expected. Data for the Flash object is embedded in the Flash object by default. If you create a Flash chart or gadget that contains data exceeding 64KB, you get an error, such as “A script in this movie is causing Adobe Flash Player to run slowly.” This error can appear in either Actuate BIRT Designer or Actuate Interactive Viewer.

To fix this error, set the Embed Data property of the chart or gadget to false, and rebuild the report. This property setting prevents data from being embedded in the Flash object, and the object displays properly. To set the Embed Data property, in the report layout, select the Flash chart or gadget, and in Property Editor, select Advanced. Note, however, that setting a chart’s Embed Data property to false displays the chart in an HTML report only. The chart does not appear in PDF.

Using the Flash object library

This chapter contains the following topics:

- About the Flash object library
- Inserting a Flash object in a report
- Providing data to a Flash object
- Using the Flash object library documentation
- Tutorial 3: Creating a Flash map that gets data through the dataXML variable
- Tutorial 4: Creating a Flash chart that gets data through the dataURL variable
- Debugging a Flash object

About the Flash object library

Actuate BIRT Designer includes a library of Flash objects developed by InfoSoft. This third-party library provides hundreds of Flash objects organized in four categories—charts, power charts, widgets, and maps. If the Flash chart and Flash gadget elements, described in the previous chapter, do not provide the type of chart or gadget that you want to use in a report, look in the Flash object library.

Unlike the Flash chart and Flash gadget elements in the palette, using a Flash object from this library requires programming in JavaScript or Java. Knowledge of XML is also essential.

About Flash charts

The Flash object library provides all the basic chart types—bar, column, line, pie, and doughnut—supported by the built-in Flash chart element, as well as, an extensive gallery of advanced charts, including combination, multi-series, scroll, and XY plot charts.

Figure 18-1 shows examples of Flash charts that are available in the library, but not in the Flash chart element in the palette.

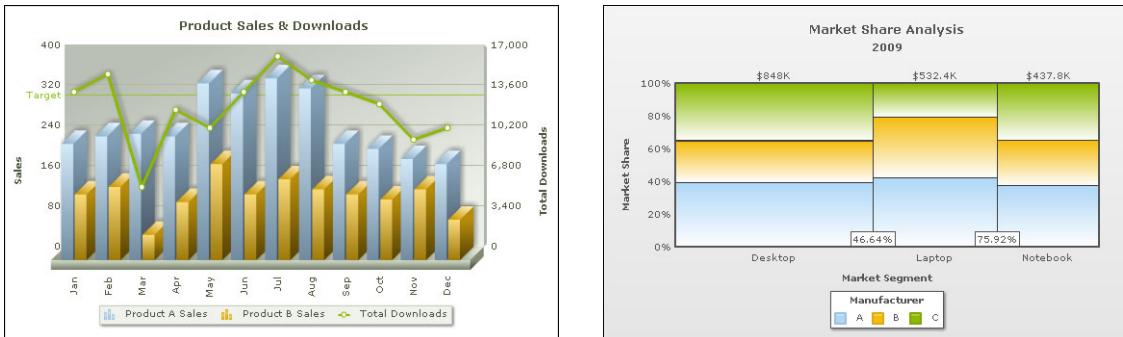


Figure 18-1 Column 3D line dual Y combination chart and marimekko chart

About Flash gadgets

The Flash object library provides all the common gadgets—linear, meter, bullet, cylinder, and thermometer—supported by the built-in Flash gadget element, and many others, including funnel, pyramid, gantt, and LED gadgets. Gadgets, commonly used in dashboard applications, are suitable for displaying KPIs (Key Performance Indicators) and other critical data that are monitored in real time.

Figure 18-2 shows examples of Flash gadgets that are available in the library, but not in the Flash gadget element in the palette.

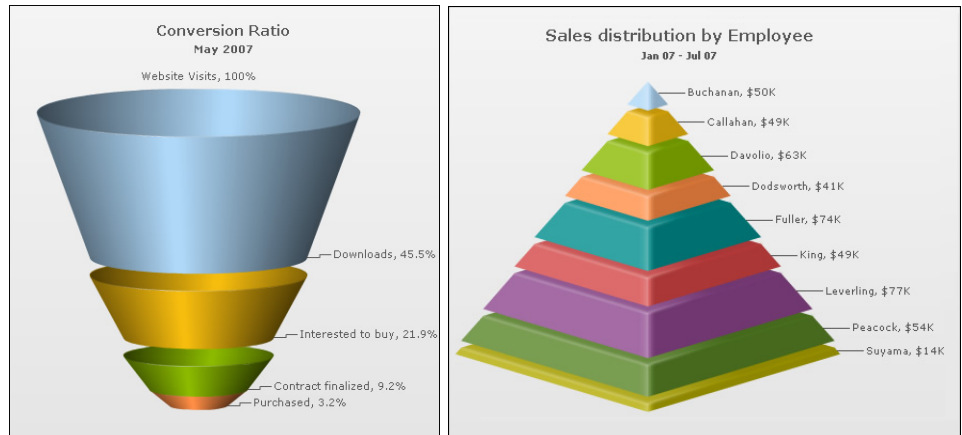


Figure 18-2 Funnel gadget and pyramid

About Flash maps

Flash maps are vector maps suitable for displaying data by geographical divisions, such as population distribution, electoral results, office locations, survey results, weather patterns, and real-estate sales. The Flash object library provides hundreds of maps, including maps of the world, continents, countries, European regions, USA states, and so on.

Figure 18-3 shows examples of Flash maps.

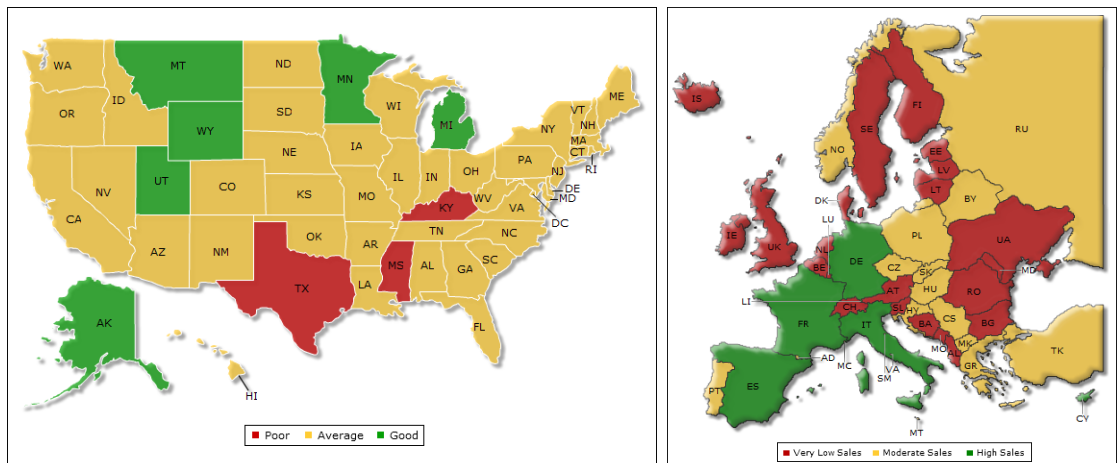


Figure 18-3 US map and Europe map

About Flash power charts

Flash power charts are specialized charting widgets that provide unique ways to present data. Charts, such as the drag-node, logarithmic, radar, kagi, and waterfall chart can be used for a wide variety of purposes, including simulations, scientific plotting, financial analysis, and hierarchical diagrams.

Figure 18-4 shows examples of power charts.

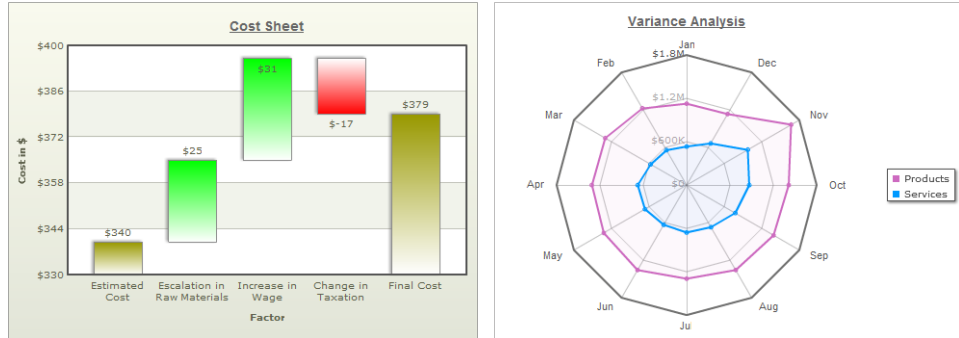


Figure 18-4 Waterfall chart and radar chart

Flash object components

Essentially, the Flash object library is a collection of Shockwave Flash (SWF) files that generate Flash charts, gadgets, or maps based on data and configuration settings provided in XML format. Each Flash object used in a report comprises the following components:

- An SWF file, which is a ready-to-use chart, gadget, or map
- XML data, which defines the data values and properties for rendering the Flash chart, gadget, or map

The Flash object library provides the SWF files. You provide the XML data in the format required by the Flash object.

Inserting a Flash object in a report

Just like the other report elements, you can insert a Flash object directly in the report page or in any of the container elements, which is the typical case. The location depends on various factors, including the position of the Flash object relative to other report elements, or whether the Flash object shares data in a data set that is used by other elements. For information about laying out a report, see *BIRT: A Field Guide*.

How to insert a Flash object

- 1 Drag the Flash Object element from the palette and drop it in the report layout.
- 2 In Flash Builder, specify the following information:
 - 1 In Select content from, select Flash Object Library, as shown in Figure 18-5.

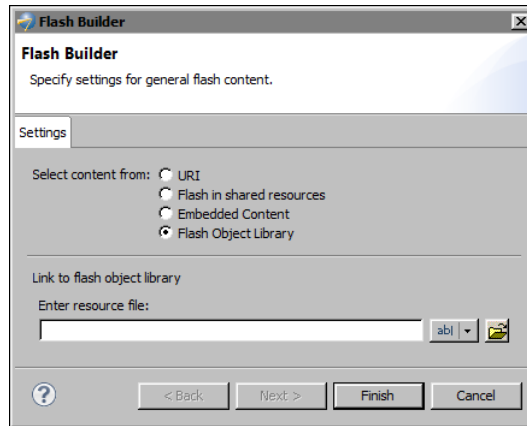


Figure 18-5 Selecting Flash Object Library

- 2 In Enter resource file, choose the open folder button to select a Flash file from the library.

Browse for Flash Files displays the top-level contents of the Flash Object Library, as shown in Figure 18-6.

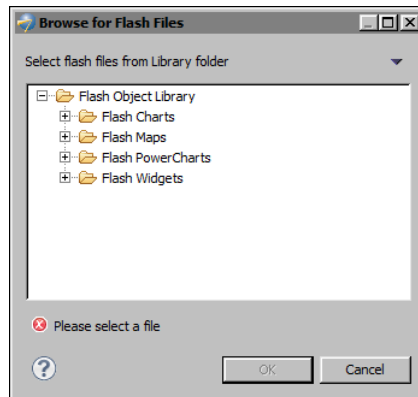


Figure 18-6 Top-level contents of the Flash Object Library

- 3 Expand the folder that contains the type of Flash object you want, then select the SWF file for the object. Figure 18-7 shows some of the SWF files in the Flash Charts folder. The names of the SWF files reflect the chart types. For example, to insert a bubble chart in the report, select Bubble.swf.

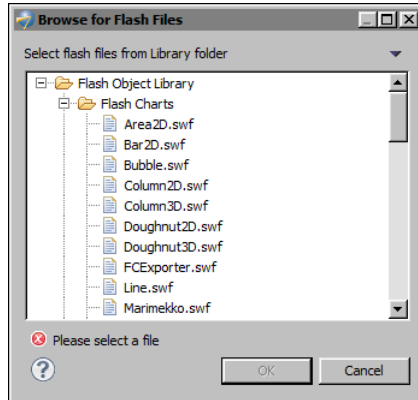


Figure 18-7 Available Flash charts

- 4 Choose OK.
- 3 Choose Finish. The Flash object appears in the report layout. Now, you must provide data to the Flash object.

Providing data to a Flash object

All Flash objects are controlled by XML properties. You must use XML to provide data to a Flash object and to define the visual and functional properties of a Flash object. Unlike the Flash charts and gadgets that you create using the Flash chart and Flash gadget elements, an object in the Flash library cannot access data directly from a data set. After creating a data set to retrieve data from a data source, you write code that accesses the data and converts it to the required XML format.

Before you can write this code, you need to know what XML is required for a given Flash object. The XML differs depending on the type of Flash object. The following example shows a basic single-series chart and the XML that defines its data and properties. Figure 18-8 shows a doughnut chart that displays a company's revenue by business division.

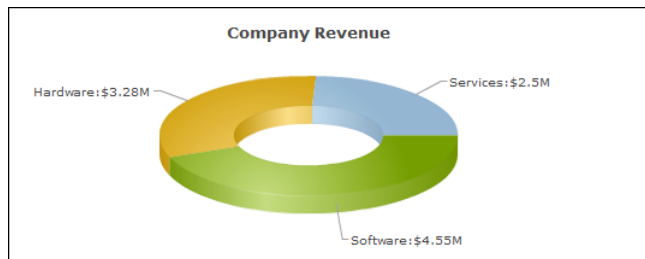


Figure 18-8 Doughnut chart displaying revenue by business division

Listing 18-1 shows the XML that defines the data and properties of the doughnut chart.

Listing 18-1 Sample XML for a doughnut chart

```
<chart caption='Company Revenue' numberPrefix='$'  
  labelSepChar=':'>  
  <set label='Services' value='2500000' />  
  <set label='Hardware' value='3280000' />  
  <set label='Software' value='4550000' />  
</chart>
```

In a BIRT report, the values highlighted in bold are data values that are derived from a data set. Other XML attributes and values define the appearance of the chart. For example:

- caption='Company Revenue' sets the title of the chart.
- numberPrefix='\$' adds the dollar symbol as a prefix to all numbers on the chart.
- labelSepChar=':' specifies that the colon character be used to separate the data label and data values on the chart.

Even if you are not well-versed in XML, you quickly learn that chart data and formatting information are defined using the attribute='value' format. Notice that the sample XML is brief for a chart that looks presentable. Only two visual attributes are specified. The XML does not define attributes for fonts or colors. Every Flash object uses default values for visual attributes. You define attributes only to change default settings, or to add items that do not appear by default.

The next example shows a multi-series chart and the XML that defines its data and properties. Figure 18-9 shows a multi-series column chart that displays expenses and revenue from 2005 to 2009.

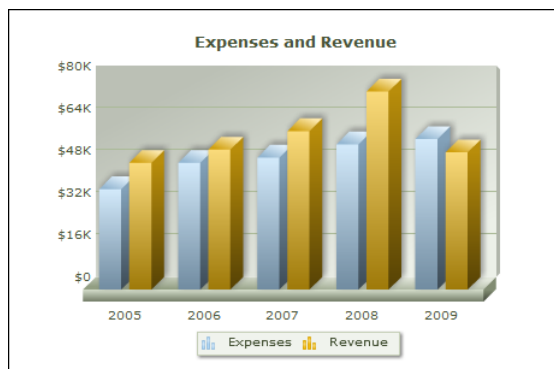


Figure 18-9 Multi-series column chart displaying expenses and revenue for five years

Listing 18-2 shows the XML that defines the data and properties of the multi-series chart.

Listing 18-2 Sample XML for a multi-series column chart

```
<chart caption='Expenses and Revenue' showValues='0' decimals='0'
  numberPrefix='$'>
  <categories>
    <category label='2005' />
    <category label='2006' />
    <category label='2007' />
    <category label='2008' />
    <category label='2009' />
  </categories>

  <dataset seriesName='Expenses'>
    <set value='38000' />
    <set value='48000' />
    <set value='50000' />
    <set value='55000' />
    <set value='57000' />
  </dataset>

  <dataset seriesName='Revenue'>
    <set value='48000' />
    <set value='53000' />
    <set value='60000' />
    <set value='75000' />
    <set value='52000' />
  </dataset>
</chart>
```

The values highlighted in bold are data values that are provided by a data set. Compared to the single-series doughnut chart, the XML for defining the data for a multi-series column chart is slightly more complex. The data for the multi-series chart is divided into three sections, whereas the data for the single-series doughnut chart is contained in one section.

Once you determine the XML needed to define the data and properties for a specific Flash object, perform the following tasks:

- 1 Write code to generate the XML.

Use either JavaScript or Java, depending on the method you use to pass the XML to the Flash object, described next.

- 2 Pass the XML to the Flash object.

There are two ways to accomplish this task. Use either the dataXML variable or the dataURL variable to pass the XML to the Flash object.

Generating the XML data

Defining the visual attributes is straightforward. Simply use the attribute='value' format for each attribute; for example, color='8BBA00'. Defining the data, however, requires programming to iterate through a data set and retrieve values from each row of data.

The following examples include code snippets, which show how to accomplish this task using JavaScript. For complete programming examples using JavaScript and Java, review the tutorials later in this chapter.

Doughnut chart example

In the doughnut chart example shown in Figure 18-8, data is defined using the <set> tag and the following format:

```
<set label='Services' value='2500000' />
```

The code you write must get values from two columns, one that stores business division values, and another that stores revenue values. Assume that the data set providing the data values returns rows as shown in Figure 18-10.

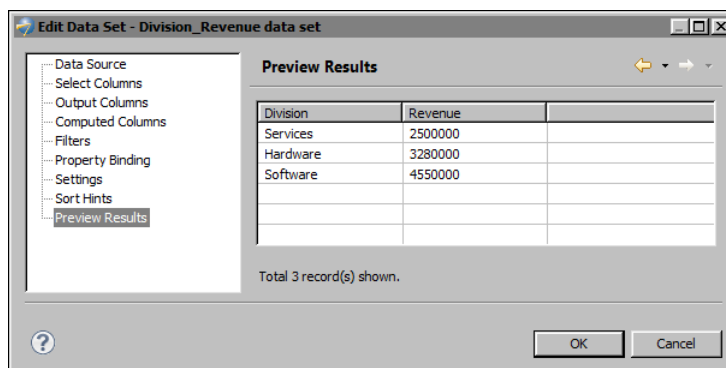


Figure 18-10 Data rows returned by data set in doughnut chart example

The JavaScript code for getting the division and revenue values from a data set row and creating a single <set> line would look like the following:

```
var setData = "<set ";
setData = setData + "label='" +
    this.getRowData().getColumnValue("Division") + "'";
setData = setData + "value='" +
    this.getRowData().getColumnValue("Revenue") + "' />";
```

To generate all the <set> lines, add code, such as the following:

```
xmlData = xmlData + setData;
```

Multi-series chart example

In the multi-series chart example shown in Figure 18-9, category data is defined within the <categories> tag using the <category> tag in the following format:

```
<category label='2005' />
```

Value series data is defined within the <dataset> tag using the <set> tag in the following format:

```
<set value='38000' />
```

The code you write gets values from three columns in each data set row. Assume that the data set providing the data values returns rows as shown in Figure 18-11.

Year	Expenses	Revenue
2005	38000	48000
2006	48000	53000
2007	50000	60000
2008	55000	75000
2009	57000	52000

Figure 18-11 Data rows returned by data set in multi-series chart example

The JavaScript code for getting the column values from each data set row would look like the following:

```
var YearData = "<category label='" +  
    this.getRowData().getColumnValue("Year") + "' />";  
  
var ExpenseData = "<set value='" +  
    this.getRowData().getColumnValue("Expenses") + "' />";  
  
var RevenueData = "<set value='" +  
    this.getRowData().getColumnValue("Revenue") + "' />";
```

To generate all the <category> and <set> lines, add code, such as the following:

```
dataPart1 = dataPart1 + YearData;  
dataPart2 = dataPart2 + ExpenseData;  
dataPart3 = dataPart3 + RevenueData;
```

Using the dataXML variable to pass XML data

Use the dataXML variable if the XML to pass to the Flash object is less than 64KB, a limit imposed by the Flash Player. Passing the data through the dataXML variable embeds the data in the Flash object. If the XML exceeds 64KB, the Flash Player displays an error. When using the dataXML variable, you write JavaScript code, as shown in the code examples in the previous section, to generate the XML.

Writing this code requires a basic understanding of BIRT events and their order of execution, as well as, BIRT elements and the functions for manipulating data.

How to use the dataXML variable to pass data to the Flash object

This procedure assumes you have already generated the data in XML format, as described in the previous section.

- 1 In the report layout, select the Flash object.
- 2 In Property Editor, choose the Flash Variables tab.
- 3 In the Flash Variables page, choose Add.
- 4 In Add Variables, do the following:
 - 1 In Name, type:
dataXML
 - 2 In Expression, choose the JavaScript expression builder.
- 5 In the JavaScript expression builder, type an expression that passes the complete XML to the Flash object. The following expression passes the XML for creating the doughnut chart shown earlier in Figure 18-8:

```
//Get the data generated and saved in the g_dataPart global var  
var g_dataPart =  
    reportContext.getPersistentGlobalVariable("g_dataPart");  
  
//Build the complete XML  
"<chart caption='Company Revenue' showPercentageValues='1'>" +  
    g_dataPart + "</chart>"
```
- 6 Choose OK to save the expression.
- 7 Choose OK to save the dataXML variable.

Using the dataURL variable to pass XML data

Use the dataURL variable if the XML to pass to the Flash object exceeds 64KB, which can occur for more complex objects, such as multi-series combination charts that require many rows of data or the definition of a large number of attributes.

When you use the dataURL variable, the XML data is stored in a separate file rather than embedded in the Flash object. To use this method, you write a Java class to generate the XML file, then pass the URL of the program to the Flash object.

Writing a Java class requires experience with the Eclipse Java development process. The Java class must be implemented as a plug-in, which is a modular component that provides a specific type of service within the Eclipse platform. In

fact, all the tools in Eclipse and Actuate BIRT Designer are plug-ins. For information about developing plug-ins, see the Eclipse documentation.

How to use the dataURL variable to pass data to the Flash object

This procedure assumes you have already implemented a plug-in that generates the XML file to pass to the Flash object.

- 1 In the report layout, select the Flash object.
- 2 In Property Editor, choose the Flash Variables tab.
- 3 In the Flash Variable page, choose Add.
- 4 In Add Variables, do the following:
 - 1 In Name, type:
dataURL
 - 2 In Expression, choose the JavaScript expression builder.
- 5 In the JavaScript expression builder, type an expression that passes the URL of the plug-in to the Flash object. Use the `createDataURL()` method of the `flashContext` object, as shown in the following example:

```
flashContext.createDataURL("ComboChartXMLFormat", true, null);
```

The first argument, `ComboChartXMLFormat`, is the format defined in the plug-in. The second argument, `true`, specifies that the URL is encoded. The third argument, `null`, specifies that there are no custom parameter names and values to pass to the URL.
- 6 Choose OK to save the expression.
- 7 Choose OK to save the dataURL variable.

Using the Flash object library documentation

This chapter describes the procedures for inserting a Flash object from the library in a report and passing data to the object. This chapter does not provide documentation about every Flash object, the structure of each object, or the XML elements and attributes that you use to create an object. This information, essential for generating the required XML, is available in the InfoSoft documentation, which is included in Actuate BIRT Designer's online help.

To access the InfoSoft documentation, in the main menu, choose **Help**→**Help Contents**. In **Help**, expand **Actuate BIRT Guide**. The InfoSoft documentation is titled **Flash Object Library Reference**.

This reference is organized by Flash object type, as shown in Figure 18-12.

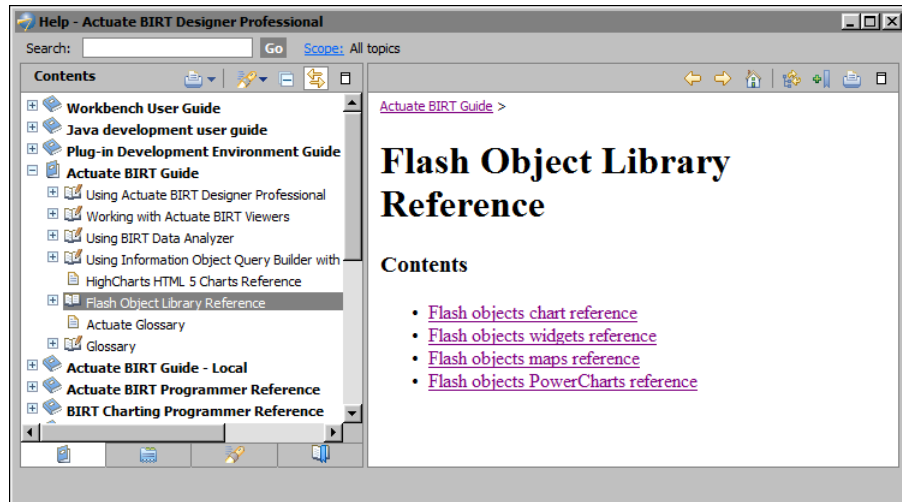


Figure 18-12 Contents of the Flash Object Library Reference

To find documentation about a particular Flash object, choose the corresponding reference, then drill down until you find the specification for the specific Flash object. The specification provides a complete reference to the object, including descriptions of all the parts of the object, and all the properties that can be set to manipulate and format the object. For example, let's say you want to see reference information about the 3D pie chart. First, choose Flash objects chart reference. In the InfoSoft documentation for charts, navigate through the following topic structure: Chart XML API—Single Series Charts—Pie 3D Chart.

Tutorial 3: Creating a Flash map that gets data through the dataXML variable

This tutorial provides step-by-step instructions for building a report that uses a Flash map from the Flash object library to display sales by territory. The map uses data from the Classic Models sample database, which you convert to XML and pass to the map through the dataXML variable.

This tutorial requires a considerable amount of code (SQL, JavaScript, and XML). Instead of typing the code, you can copy the code from the online help.

You perform the following tasks in this tutorial:

- Create a new report.
- Build a data source.
- Build a data set.

- Find a suitable Flash map.
- Review the map specifications.
- Map the data set values to the Flash map entity values.
- Add the Flash map to the report.
- Generate an XML data string.
- Create the dataXML variable and pass the data.
- Format the Flash map.

Task 1: Create a new report

This task assumes you have already created a project for your reports.

- 1 Choose File→New→Report.
- 2 In Select Project, select the project in which to create the report, then choose Next.
- 3 In New Report, type the following text as the file name:
`SalesByTerritory.rptdesign`
- 4 Choose Finish. A blank report appears in the layout editor.

Task 2: Build a data source

In this procedure, create a data source to connect to the Classic Models sample database.

- 1 Choose Data Explorer.
- 2 Right-click Data Sources, and choose New Data Source from the context menu.
- 3 Select Classic Models Inc. Sample Database from the list of data sources. Use the default data source name, then choose Next. Connection information about the new data source appears.
- 4 Choose Finish. The new data source appears under Data Sources in Data Explorer.

Task 3: Build a data set

In this procedure, build a data set to specify what data to retrieve and combine from various tables in the database.

- 1 In Data Explorer, right-click Data Sets, and choose New Data Set.
- 2 In New Data Set, in Data Set Name, type the following text:
`Sales By Territory`

Use the default values for the other fields.

- Data Source Selection shows the name of the data source that you created earlier.
- Data Set Type specifies that the data set uses a SQL SELECT query to retrieve the data.

3 Choose Next.

4 In New Data Set —Query, type the following SQL SELECT statement to retrieve the sales total for each territory:

```
SELECT CLASSICMODELS.OFFICES.TERRITORY,  
SUM(CLASSICMODELS.ORDERDETAILS.QUANTITYORDERED *  
CLASSICMODELS.ORDERDETAILS.PRICEEACH) as SALES  
FROM CLASSICMODELS.CUSTOMERS,  
CLASSICMODELS.ORDERS,  
CLASSICMODELS.ORDERDETAILS,  
CLASSICMODELS.OFFICES,  
CLASSICMODELS.EMPLOYEES  
WHERE CLASSICMODELS.ORDERS.ORDERNUMBER =  
CLASSICMODELS.ORDERDETAILS.ORDERNUMBER  
AND CLASSICMODELS.CUSTOMERS.SALESREPEMPLYEENUMBER =  
CLASSICMODELS.EMPLOYEES.EMPLOYEEENUMBER  
AND CLASSICMODELS.EMPLOYEES.OFFICECODE =  
CLASSICMODELS.OFFICES.OFFICECODE  
AND CLASSICMODELS.CUSTOMERS.CUSTOMERNUMBER =  
CLASSICMODELS.ORDERS.CUSTOMERNUMBER  
GROUP BY CLASSICMODELS.OFFICES.TERRITORY
```

5 Choose Finish to save the data set. Edit Data Set displays the columns specified in the query, and provides options for editing the data set.

6 Choose Preview Results. Figure 18-13 shows the data rows that the data set returns.

TERRITORY	SALES
APAC	1147176.3499999999
EMEA	4520712.2799999993
Japan	457110.069999999983
NA	3479191.9099999997

Total 4 record(s) shown.

Figure 18-13 Sales By Territory data set preview

7 Choose OK.

Task 4: Find a suitable Flash map

The data set created in the previous task returns sales data for four worldwide territories: APAC (Asia Pacific), EMEA (Europe and middle east), Japan, and NA (North America). In this procedure, look in the Flash object library for a map suitable for representing data in these territories.

- 1 In Help, expand Actuate BIRT Guide, choose Flash Object Library Reference, then choose Flash objects maps reference.
- 2 Choose Map Gallery—World & Continents. This folder lists three world maps: World Map, World Map (Countries), and World Map (8 Regions). Review each map.
- 3 For this tutorial, either World Map or World Map (8 Regions) is suitable for the data. Use World Map. The help displays the image of World Map, as shown in Figure 18-14.

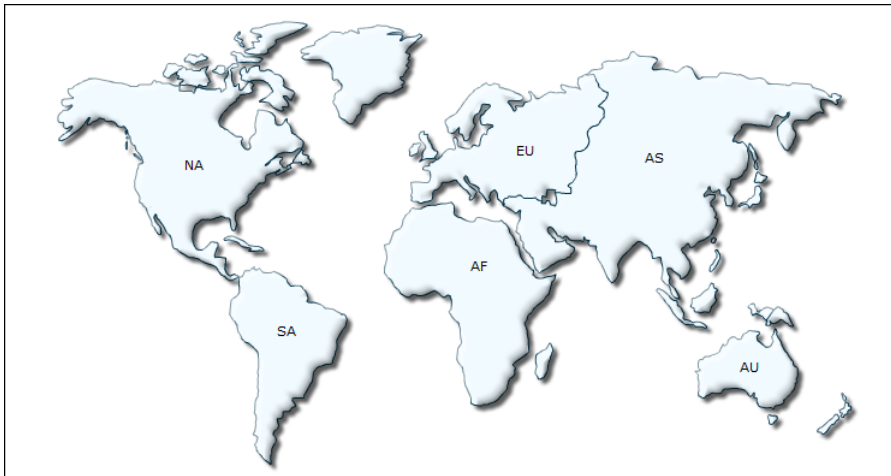


Figure 18-14 World Map available in Flash Object Library

World Map displays the names of the continents as two-letter abbreviations: NA, SA, AF, EU, AS, and AU. The Classic Models data uses these acronyms for the sales territories: APAC, EMEA, Japan, NA.

Task 5: Review the map specifications

Each map in the library displays different entities. An entity is the smallest item represented in a map. For example, in a world map that shows continents, each continent is an entity. In a continent map that shows countries, each country is an entity. Similarly, in a country map that shows states, each state is an entity. In this procedure, review the entities in World Map.

- 1 In the online Help for Flash maps, choose Map Specification Sheets—World & Continents—World Map.
- 2 The World Map Specification Sheet, shown in Figure 18-15, displays information about the map, including its list of entities. Each entity has the following properties:
 - Internal Id—The ID through which an entity is referred to in the XML data document
 - Short Name—The abbreviated entity name, which appears on the map
 - Long Name—The full entity name, which appears as a tool tip

World Map Specification Sheet		
Map Name: World Map SWF Name: FCMap_World.swf Dimensions (Width x Height): 750 x 400 pixels Selection: Continents		
List of Entities		
Internal Id	Short Name (Abbreviated Name)	Long Name
NA	NA	North America
SA	SA	South America
EU	EU	Europe
AF	AF	Africa
AU	AU	Australia
AS	AS	Asia

Figure 18-15 World Map Specification Sheet available in online help

Task 6: Map the data set values to the Flash map entity values

To display data from the data set in the Flash map, you need to map the territory values in the data set to the internal ID values used by World Map.

- 1 In Data Explorer, under Data Sets, right-click Sales By Territory, then choose Edit.
- 2 In Edit Data Set, choose Computed Columns, then choose New.
- 3 In New Computed Column, specify the following information:
 - 1 In Column Name, type Territory_ID.
 - 2 In Data Type, select String.
 - 3 In Expression, choose the JavaScript expression builder.
 - 4 In the expression builder, type the following statement, then choose OK.
 Each case statement replaces a territory value with the corresponding internal ID used by the map.

```

switch(row["TERRITORY"]) {
    case "EMEA":
        name = "EU";
        break;
    case "APAC":
        name = "AS";
        break;
    case "Japan":
        name = "AS";
        break;
    case "NA":
        name = "NA";
        break;
}

```

5 Choose OK.

- 4 Choose Preview Results. The data set returns the data shown in Figure 18-16. The Territory_ID values match Internal Id values in World Map.

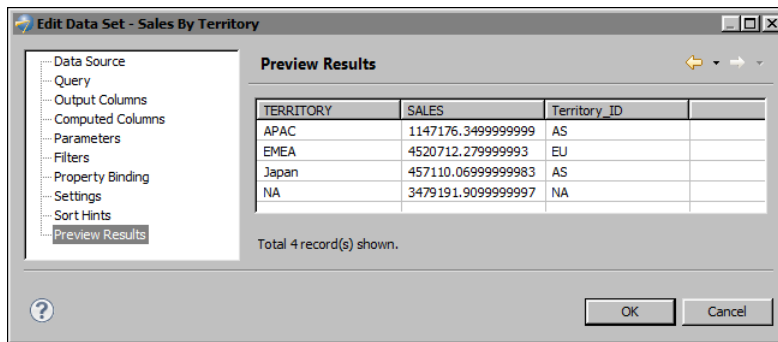


Figure 18-16 Sales By Territory data set preview includes Territory_ID values

- 5 Choose OK.

Task 7: Add the Flash map to the report

In this procedure, add World Map from the Flash object library to the report.

- 1 Insert a table that consists of one column and one detail row, and bind the table to the Sales By Territory data set.
- 2 Drag a Flash Object element from the palette and drop it in the table's footer row.
- 3 In Flash Builder, specify the following information:
 - 1 In Select content from, select Flash Object Library, as shown in Figure 18-17.

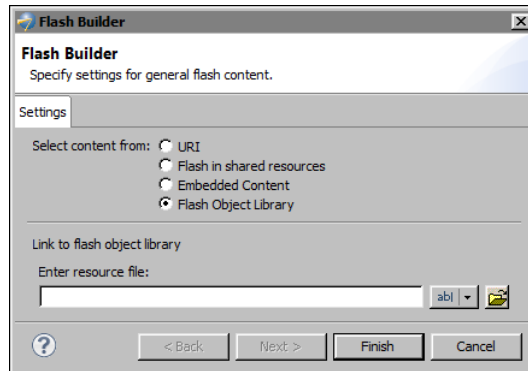


Figure 18-17 Selecting Flash Object Library

- 2 In Enter resource file, choose the open folder button to select a Flash file from the library.
- 3 In Browse for Flash Files, expand Flash Maps, and select FCMap_World.swf. Choose OK. In Flash Builder, the path to the Flash file appears in Enter resource file.
- 4 Choose Finish.

Task 8: Generate an XML data string

Data provided to any Flash object must be in the specific XML format that the object requires. In this procedure, look at the Flash map documentation for this information, then generate an XML data string that provides data in the required format.

- 1 In the online Help for Flash maps, choose How to use FusionMaps. This topic describes the procedure for displaying data in a map. It includes an example of displaying population data in the world map. The following is the sample XML:

```
<map borderColor='005879' fillColor='D7F4FF' numberSuffix='
  Mill.' includeValueInLabels='1' labelSepChar=': '
  baseFontSize='9'>
  <data>
    <entity id='NA' value='515' />
    <entity id='SA' value='373' />
    <entity id='AS' value='3875' />
    <entity id='EU' value='727' />
    <entity id='AF' value='885' />
    <entity id='AU' value='32' />
  </data>
</map>
```

Each XML document for maps starts with the <map> element. As the example shows, you can specify formatting attributes for the <map> element. Within the <map> element is the <data> element. The <data> element contains <entity> elements that define the data for each entity on the map. For example, <entity id='NA' value='515' /> assigns the population value 515 to the NA (North America) entity. The entity ID corresponds to the internal ID, which you saw earlier in the Map Specification Sheet for World Map.

- 2 Write code to generate an XML string that provides data defined as <entity> elements. The code needs to create the content within the <data> element. A logical place to put this code is in the OnCreate() method for the table's detail row because this method executes with each retrieval of a data row from the data set.

- 1 In the report layout, select the detail row of the table, choose Script, then select OnCreate.

- 2 Type the following code in the script editor:

```
var entityLine = "<entity id='" +
    this.getRowData().getColumnValue("Territory_ID") + "' "
    + "value='" + this.getRowData().getColumnValue("SALES")
    + "' />";
```

```
dataPart = dataPart + entityLine;
```

```
reportContext.setPersistentGlobalVariable("g_dataPart",
    dataPart );
```

The code iterates through the data rows in the data set, and builds an XML string using the Territory_ID and SALES values. The full XML string is stored as a persistent global variable so that it can be accessed anywhere in the report.

- 3 Initialize the dataPart variable, using the following steps:

- 1 Return to the report layout. Select the table, choose Script, then select OnCreate.

- 2 Type the following code:

```
dataPart="";
```

The table's OnCreate() method is typical for placing start-up or initialization code for report elements in a table.

Task 9: Create the dataXML variable and pass the data

As described earlier in this chapter, one of the ways to pass data to a Flash object is through the dataXML variable. In this procedure, create the dataXML variable and assign the XML content to the variable.

- 1 In the report layout, select the Flash object.
- 2 In Property Editor, choose Flash Variables, as shown in Figure 18-18.

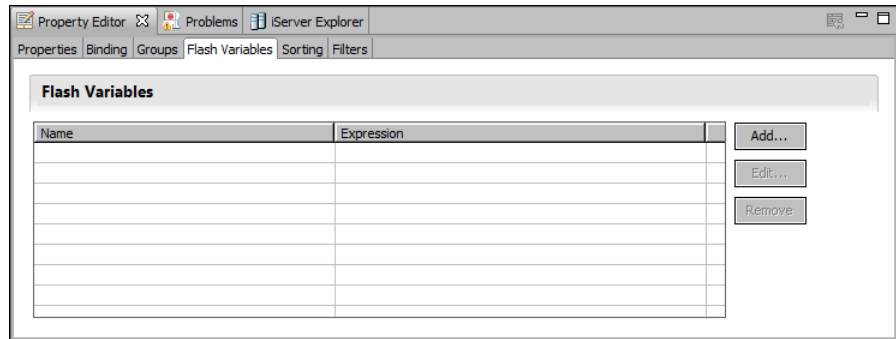


Figure 18-18 Flash Variables tab in Property Editor

- 3 Choose Add.
- 4 In Add Variables, do the following:
 - 1 In Name, type:
 - 2 In Expression, choose the JavaScript expression builder.
- 5 In the JavaScript expression builder, type the following expression:

```
var g_dataPart =
    reportContext.getPersistentGlobalVariable("g_dataPart");

"<map><data>" + g_dataPart + "</data></map>"
```

The first statement retrieves the XML data string that you created earlier and stored in the persistent global variable `g_dataPart`. The second statement builds a bare-bones XML data document that contains only the essential elements. This line creates the required `<map>` and `<data>` elements, and appends the `g_dataPart` variable, which supplies the `<entity>` data. The XML does not include any formatting attributes.

- 6 Choose OK.
- 7 Choose Preview. The previewer displays the Flash map. Move the mouse pointer over each continent. A tooltip displays the continent's full name and the sales total for that continent (if sales data exists for the continent), as shown in Figure 18-19. This Flash map uses all the default data and formatting attributes.

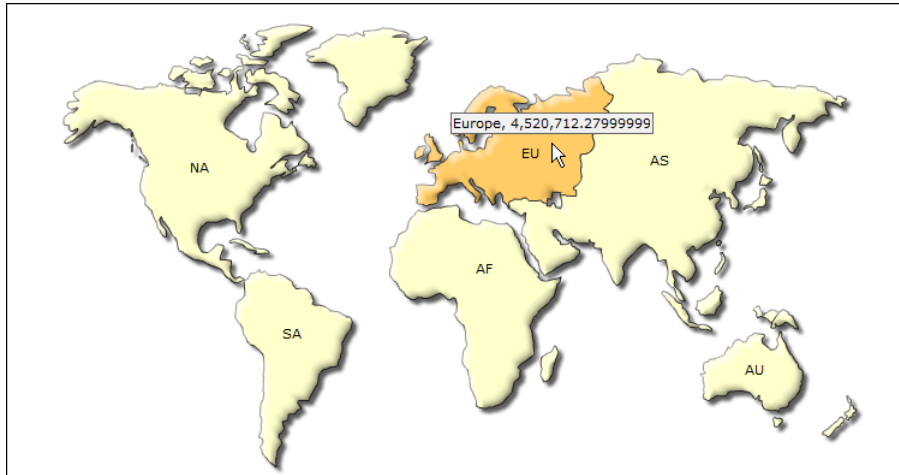


Figure 18-19 Preview of the Flash map with the mouse pointer over Europe

Task 10: Format the Flash map

Now that you verified that the map displays the correct sales data for the territories, you can focus on adding functionality and visual interest to the map. Perform the following tasks in this section:

- Display sales values in a more readable format.
- Change the colors used in the map.
- Define data ranges and apply different colors to each range.
- Create city markers.

You specify formatting attributes by editing the XML string you typed in the previous task.

Display sales values in a more readable format

In this procedure, format the sales value so that it displays \$4.52M instead of 4,520,712.27999999. Also, specify that the sales values appear on the map in the following format:

EU: \$4.52M

- 1 Choose Layout to resume editing the map.
- 2 Select the Flash object. In Property Editor, choose Flash Variables, select the dataXML variable, and choose Edit.
- 3 In Edit Variables, choose the expression builder.

- 4 In the line that defines the XML (the line that begins with "<map>"), add the text shown in bold. You must type the entire XML string in a single line.

```
"<map decimals='2' formatNumberScale='1' numberPrefix='$'  
  includeValueInLabels='1' labelSepChar=': '><data>" +  
  g_dataPart + "</data></map>"
```

For information about these attributes, see the “XML Attributes” topic in the Flash map help.

- 5 Choose Validate to verify the expression. If there are no syntax errors, choose OK.
- 6 In Edit Variables, choose OK.
- 7 Choose Preview. The sales values appear in \$4.52M format on the map and in the tooltip.

Building the XML string in readable pieces

As you add attributes, the XML string becomes increasingly difficult to type and read as a single line in the expression builder. This procedure shows how to build the XML string piece by piece.

- 1 Choose Layout to resume editing the map.
- 2 Edit the dataXML expression in the expression builder. Replace the line that defines the XML string (the line that begins with "<map>") with the following lines:

```
var str = "<map "  
//Format sales numbers  
str += "decimals='2' formatNumberScale='1' numberPrefix='$'"  
  
//Display sales numbers in the map  
str += "includeValueInLabels='1' labelSepChar=': '"  
str += ">"  
  
//Define data  
str += "<data>" + g_dataPart + "</data>"  
str += "</map>"
```

The str variable stores the XML string. The += operator adds each successive piece of string to the current string. By building the XML string in pieces, you can read, edit, delete, and add attributes easily. As the example shows, you can also add comments about the purpose of the attributes.

- 3 Choose Validate to verify the syntax of the expression.
- 4 Preview the report to ensure that the map displays correctly. The expression builder’s validation does not verify that the XML string contains valid content.

Change the colors used in the map

In this procedure, change the fill and background colors of the map. Use Hex codes for the color values.

- 1 Choose Layout to resume editing the map.
- 2 Edit the dataXML expression in the expression builder. Add the following lines before the `str += ">"` line:

```
//Colors in map  
str += "fillColor='DDDDDD' bgColor='FFFFDC'"
```

- 3 Validate the expression, then preview the report.

Define data ranges and apply different colors to each range

In this procedure, categorize the sales data into the following ranges, and apply a different color to each range:

```
0 - 1000000, Below target  
1000001 - 4000000, Within target  
4000001 - 8000000, Above target
```

- 1 Choose Layout to resume editing the map.
- 2 Edit the dataXML expression in the expression builder. Add the following lines after the `str += ">"` line. Each `str` line must be a single line.

```
//Create data ranges  
str += "<colorRange> "  
str += "<color minValue='0' maxValue='1000000'  
    displayValue='Below target' color='CCFF99' />"  
str += "<color minValue='1000001' maxValue='4000000'  
    displayValue='Within target' color='66CCFF' />"  
str += "<color minValue='4000001' maxValue='8000000'  
    displayValue='Above target' color='FFDDFF' />"  
str += "</colorRange>"
```

- 3 Validate the expression, then preview the report.

Create city markers

In this procedure, display markers for these cities in which there are sales offices: New York, Paris, San Francisco, and Tokyo. To display markers, define the properties of each marker, including a user-specified ID, its XY position, the label to display, and the position of the label relative to the marker. You can also specify the shape, size, and color of each marker. After defining the markers, create the list of markers to display on the map.

- 1 Choose Layout to resume editing the map.

- 2 Edit the dataXML expression in the expression builder. Add the following lines after the data range definition, that is, after the `str += "</colorRange>"` line. Each `str` line must be a single line.

```
// Define city markers
str += "<markers>"
str += " <definition>"
str += "<marker id='NYC' x='210' y='140' label='New York'
      labelPos='bottom' />"
str += "<marker id='PAR' x='360' y='130' label='Paris'
      labelPos='bottom' />"
str += "<marker id='TOK' x='630' y='160' label='Tokyo'
      labelPos='right' />"
str += "<marker id='SFO' x='80' y='163' label='San Francisco'
      labelPos='left' />"
str += "</definition>"

//Specify the shape, size, and color of the markers
str += "<shapes>"
str += "<shape id='TOKdot' type='circle' radius='3'
      fillColor='ffd700' labelPadding='+1' /> "
str += "<shape id='PARdot' type='circle' radius='3'
      fillColor='ffd700' labelPadding='-2' /> "
str += "<shape id='NYCdot' type='circle' radius='3'
      fillColor='ffd700' labelPadding='+1' /> "
str += "<shape id='SFODot' type='circle' radius='3'
      fillColor='ffd700' labelPadding='+1' /> "
str += "</shapes>"

//Specify which markers to display
str += "<application>"
str += "<marker id='TOK' shapeId='TOKdot' />"
str += "<marker id='NYC' shapeId='NYCdot' />"
str += "<marker id='PAR' shapeId='PARdot' />"
str += "<marker id='SFO' shapeId='SFODot' />"
str += "</application>"
str += "</markers>"
```

- 3 Validate the expression, then preview the report.

The map should look like the one shown in Figure 18-20. The territories with sales data appear in different colors. A legend displaying the data range colors and labels appears on the right. The map displays circular markers and labels for San Francisco, New York, Paris, and Tokyo.

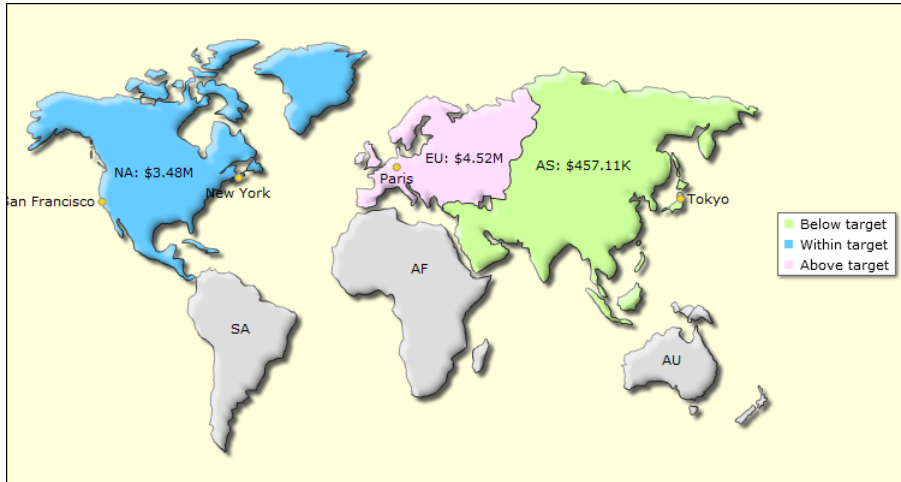


Figure 18-20 Flash map displaying all the formats you applied

This tutorial demonstrates only a few of the attributes that you can use to format and manipulate a Flash map. For a complete list and descriptions of the attributes, see the Flash map help.

Tutorial 4: Creating a Flash chart that gets data through the dataURL variable

This tutorial provides step-by-step instructions for building a report that uses a combination chart from the Flash object library to display revenue data by country. The chart uses data from the Classic Models sample database, which you convert to XML and pass to the chart through the dataURL variable.

As described earlier, using the dataURL variable to pass data requires Java programming and plug-in development experience. Although this tutorial provides detailed procedures accompanied by screen illustrations and conceptual explanations, Java programming experience is essential in the event basic troubleshooting is required or your Eclipse environment does not match exactly the environment shown in this tutorial.

You perform the following tasks in this tutorial:

- Create a new report.
- Build a data source.
- Build a data set.
- Add a Flash chart to the report.

- Create a plug-in.
- Define an extension.
- Create a Java class.
- Implement methods in the class.
- Deploy the plug-in.
- Create the dataURL variable.

Task 1: Create a new report

- 1 Choose File→New→Report.
- 2 In Select Project, select a project in which to create the report. Choose Next.
- 3 In New Report, type the following text as the file name:
`RevenueByCountry.rptdesign`
- 4 Choose Finish. A blank report appears in the layout editor.

Task 2: Build a data source

In this procedure, create a data source to connect to the Classic Models sample database.

- 1 Choose Data Explorer.
- 2 Right-click Data Sources, and choose New Data Source from the context menu.
- 3 Select Classic Models Inc. Sample Database from the list of data sources. Use the default data source name, then choose Next. Connection information about the new data source appears.
- 4 Choose Finish. The new data source appears under Data Sources in Data Explorer.

Task 3: Build a data set

In this procedure, build a data set to indicate what data to retrieve from various tables in the database.

- 1 In Data Explorer, right-click Data Sets, and choose New Data Set.
- 2 In New Data Set, in Data Set Name, type the following text:
`Revenue`
 Use the default values for the other fields.
 - Data Source Selection shows the name of the data source that you created earlier.

- Data Set Type specifies that the data set uses a SQL SELECT query to retrieve the data.

3 Choose Next.

4 In New Data Set—Query, type the following SQL SELECT statement to retrieve the revenue and total of items sold for each country:

```
SELECT CLASSICMODELS.CUSTOMERS.COUNTRY,
SUM (CLASSICMODELS.ORDERDETAILS.QUANTITYORDERED *
CLASSICMODELS.ORDERDETAILS.PRICEEACH) as SALES,
SUM (CLASSICMODELS.ORDERDETAILS.QUANTITYORDERED) as QUANTITY
FROM CLASSICMODELS.CUSTOMERS,
CLASSICMODELS.ORDERS,
CLASSICMODELS.ORDERDETAILS
WHERE CLASSICMODELS.CUSTOMERS.CUSTOMERNUMBER =
CLASSICMODELS.ORDERS.CUSTOMERNUMBER
AND CLASSICMODELS.ORDERS.ORDERNUMBER =
CLASSICMODELS.ORDERDETAILS.ORDERNUMBER
GROUP BY CLASSICMODELS.CUSTOMERS.COUNTRY
HAVING SUM (CLASSICMODELS.ORDERDETAILS.QUANTITYORDERED *
CLASSICMODELS.ORDERDETAILS.PRICEEACH) > 200000
ORDER BY 2 DESC
```

5 Choose Finish to save the data set. Edit Data Set displays the columns specified in the query, and provides options for editing the data set.

6 Choose Preview Results. Figure 18-21 shows the data rows that the data set returns.

COUNTRY	SALES	QUANTITY
USA	3273280.0499999996	35844
Spain	1099389.0899999992	12429
France	1007374.0200000004	11090
Australia	562582.59	6246
New Zealand	476847.00999999983	5396
UK	436947.4400000001	5013
Italy	360616.80999999994	4045
Finland	295149.35000000003	3192
Norway	270846.29999999999	2842
Singapore	263997.77999999999	2760
Denmark	218994.92	2197
Canada	205911.85999999996	2293

Total 12 record(s) shown.

Figure 18-21 Revenue data set preview

7 Choose OK.

Task 4: Add a Flash chart to the report

In this procedure, add the 2D dual-Y combination chart from the Flash object library to the report.

- 1 Drag a Flash Object element from the palette and drop it in the report layout.
- 2 In Flash Builder, specify the following information:
 - 1 In Select content from, select Flash Object Library.
 - 2 In Enter resource file, choose the open folder button to select a Flash file from the library.
 - 3 In Browse for Flash Files, expand Flash Charts, and select MSCombiDY2D.swf, as shown in Figure 18-22.

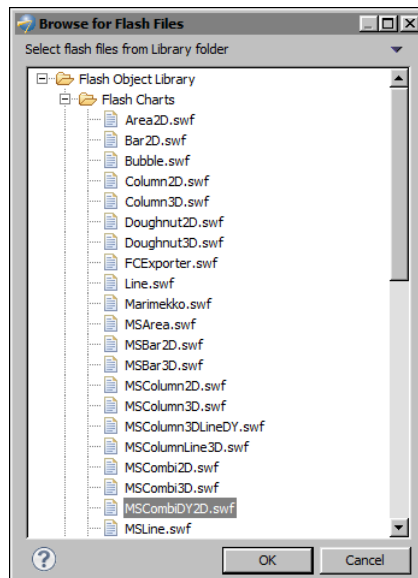


Figure 18-22 Selecting a Flash chart from the Flash Object Library

- 4 Choose OK. In Flash Builder, the path to the Flash file appears in Enter resource file.
- 3 Choose Finish.
- 4 Bind the Flash object to the Revenue data set.
 - 1 While the Flash object is selected, in Property Editor, choose the Binding tab.
 - 2 In the Binding page, in Data Set, select Revenue.The Flash object has access to data in the selected data set.

Task 5: Create a plug-in

Data provided to any Flash object must be in the specific XML format that the object requires. To use the dataURL variable to pass data to the Flash object, you create a Java class to generate an XML document, and deploy the class as a plug-in. In this procedure, you create the plug-in using the Eclipse Plug-in Development Environment (PDE).

- 1 In the main menu, choose Window→Open Perspective→Other.
- 2 In Open Perspective, choose Plug-in Development, as shown in Figure 18-23.

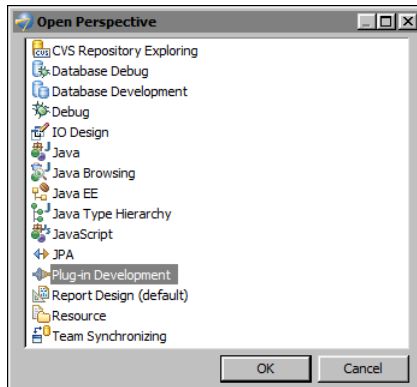


Figure 18-23 Selecting the Plug-in Development perspective

Choose OK. The Plug-in Development perspective displays the views and tools for creating and managing plug-ins.

- 3 Choose File→New→Project.
- 4 In New Project, expand Plug-in Development, and select Plug-in Project, as shown in Figure 18-24.

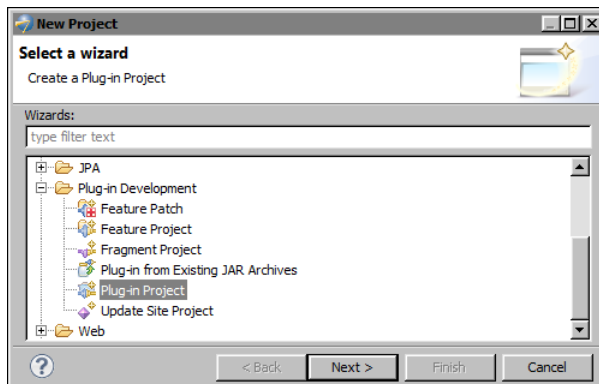


Figure 18-24 Selecting Plug-in Project

Choose Next.

5 In New Plug-in Project, specify the following project information:

1 In Project Name, type:

`com.actuate.birt.flash.library.sample.CombinationChart`

This name follows the naming convention used by Actuate BIRT plug-ins.

2 In Target Platform, select the following option:

OSGi framework: Equinox

OSGi is a framework specification for developing and deploying modular Java applications. Equinox is an Eclipse project that implements the OSGi framework and is the plug-in technology used by Eclipse and BIRT.

3 Use the default values for the other properties. Figure 18-25 shows the information specified for the plug-in project.

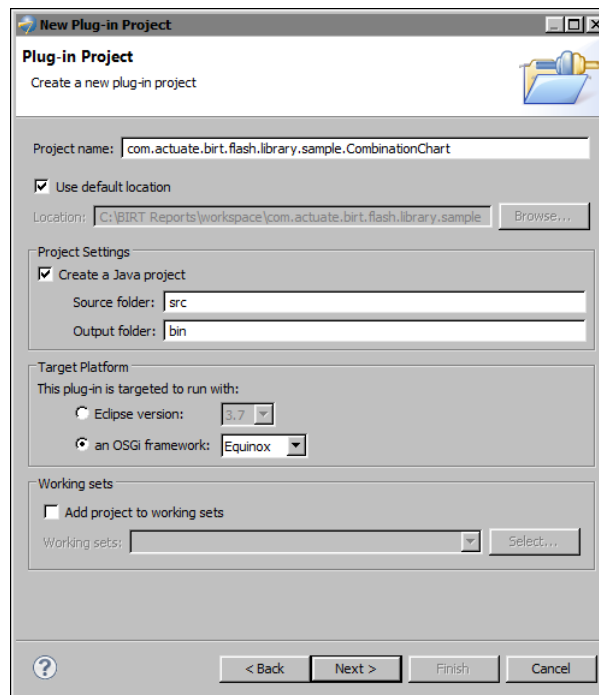


Figure 18-25 Properties of the plug-in project

Choose Next.

6 In New Plug-in Project—Content, specify the information for generating the plug-in.

- 1 In Properties, use all the default values.
 - ❑ ID identifies the plug-in. By default, the value you specified as the project name in the previous step is used as the ID value.
 - ❑ Version is the version number to assign to this plug-in.
 - ❑ Name is the plug-in's display name, which appears in general descriptions about the plug-in.
 - ❑ Provider is the name of the plug-in contributor.
 - ❑ Execution Environment specifies the JRE (Java run-time environment) to use.
- 2 In Options, uncheck the first option, Generate an activator, a Java class that controls the plug-in's life cycle.

Figure 18-26 shows the information for generating the plug-in.

New Plug-in Project

Content
Enter the data required to generate the plug-in.

Properties

ID:

Version:

Name:

Provider:

Execution Environment:

Options

☐ Generate an activator, a Java class that controls the plug-in's life cycle
Activator:

☐ This plug-in will make contributions to the UI

☐ Enable API Analysis

Figure 18-26 Information for generating the plug-in

Choose Finish.

Eclipse creates the plug-in. The Plug-in editor displays an Overview page, as shown in Figure 18-27. This page shows the properties of the plug-in and provides links to pages about developing, testing, and deploying a plug-in.

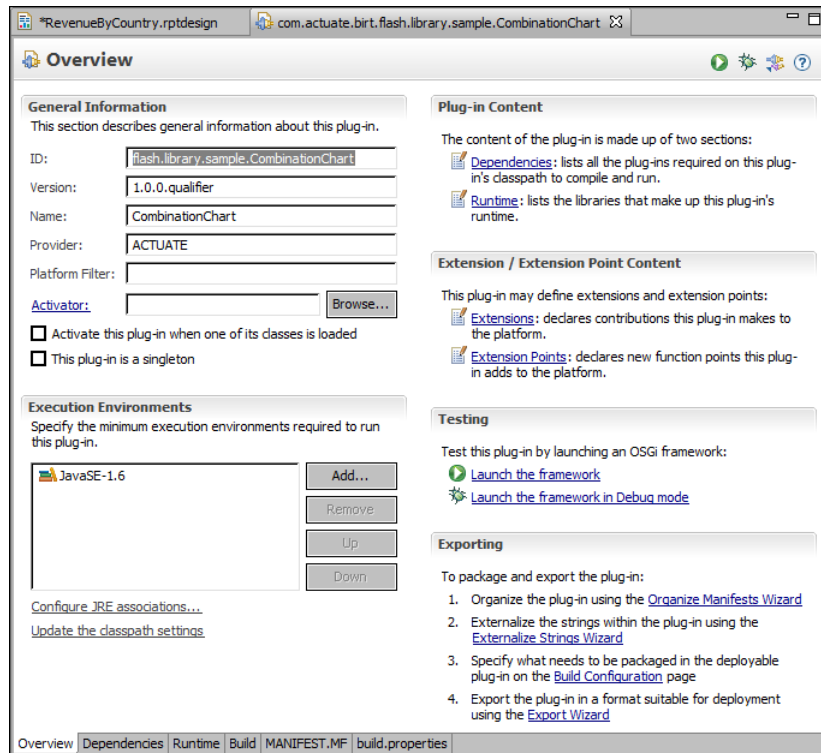


Figure 18-27 Plug-in editor displaying overview information

Task 6: Define an extension

In this procedure, define an extension that customizes the data extraction functionality provided by the `org.eclipse.birt.report.engine.dataextraction` plug-in. This plug-in defines an extension point, which your plug-in uses to define a custom extension to retrieve data from the data set and generate the XML data required by the Flash chart.

- 1 In the Plug-in editor, choose the Extensions tab. If an Extension tab is not available, do the following:
 - 1 In the Overview page, in the Extension/Extension Point Content section, choose the Extensions link.
 - 2 In the message that appears, choose Yes.
- 2 In the Extensions page, choose Add.
- 3 In New Extension, perform the following steps:
 - 1 Deselect Show only extension points from the required plug-ins.

- 2 Select `org.eclipse.birt.report.engine.dataExtraction` from the list of extension points, as shown in Figure 18-28.

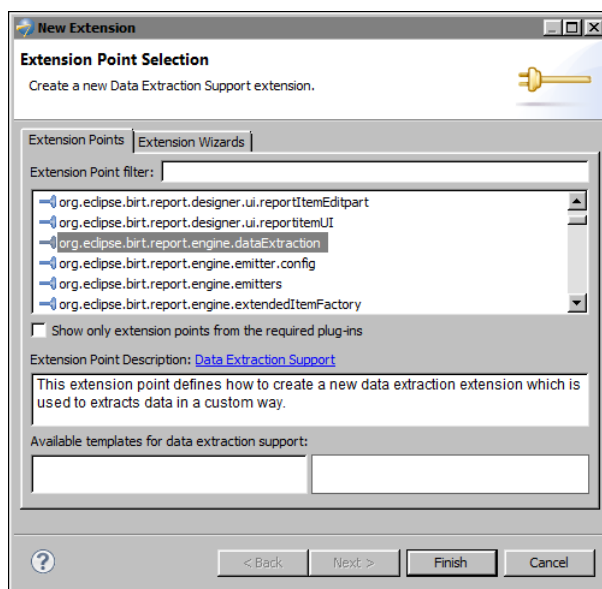


Figure 18-28 Selecting an extension point

Choose Finish. A message asks if you want to add a dependency to the `org.eclipse.birt.report.engine` plug-in. Choose Yes. The Extensions page displays the new extension to the plug-in.

- 4 In Extension Element Details, edit the extension properties using the values shown in Table 18-1.

Table 18-1 Extension properties

Property	Value	Description
id	<code>com.actuate.birt.flash.library.sample.combchart.XMLGenerator</code>	The extension identifier.
format	<code>CombChartXMLFormat</code>	The supported format of this data extraction extension. Later, when you create the Flash chart's <code>dataURL</code> variable, you pass the format value as an argument to the <code>createDataURL()</code> method.
class	<code>com.actuate.birt.flash.library.sample.combchart.XMLGenerator</code>	The Java class that implements the <code>IDataExtractionExtension</code> interface. You create this class later.

Table 18-1 Extension properties

Property	Value	Description
contentType	text/xml	Mime type of the file generated by the extension.
name	Combination Chart XML Format	The name of the extension. This name appears in the user interface.
isHidden	true	Specifies whether format is shown in the user interface.

Figure 18-29 shows the specified properties in the Extensions page.

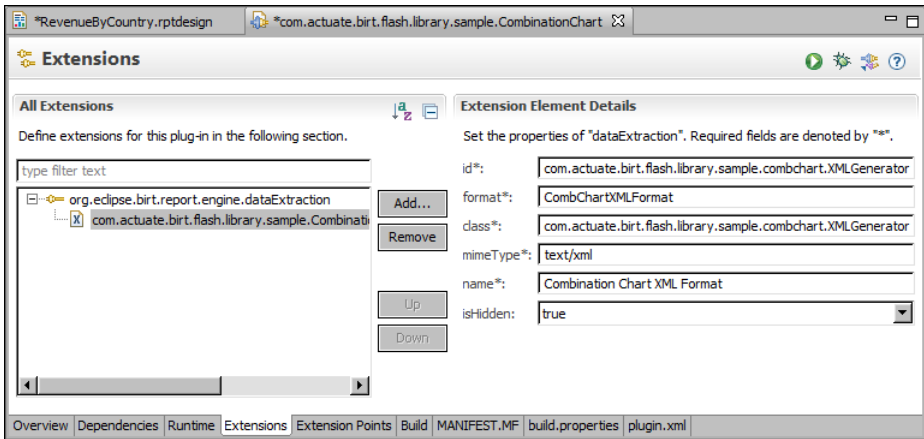


Figure 18-29 Properties of the extension

- 5 Save the plug-in. Package Explorer displays the folder structure of the plug-in, as shown in Figure 18-30.

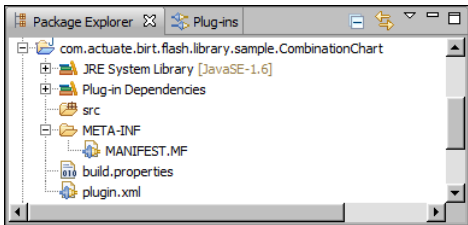


Figure 18-30 Package Explorer displaying the folder structure of the plug-in

Task 7: Create a Java class

In this procedure, create a Java class that contains the code to generate the XML data required by the Flash chart. This class implements the data extraction interface, `IDataExtractionExtension`.

- 1 In Package Explorer, right-click the src folder, then choose New→Class.
- 2 In New Java Class, specify the following information:
 - 1 In Package, type:
`com.actuate.birt.flash.library.sample.combchart`
 - 2 In Name, type:
`XMLGenerator`
 - 3 In Interfaces, choose Add to add the data extraction interface.
 - 4 In Implemented Interfaces Selection, select `IDataExtractionExtension`. If the dialog box does not display any interfaces, do the following:
 - ❑ Under Choose interfaces, type:
`IDataE`
Matching items lists the interfaces that begin with `IDataE`.
 - ❑ Select `IDataExtractionExtension`.
 - ❑ Choose OK.
 - 5 Use the default values for the other options. Figure 18-31 shows the properties for the class.

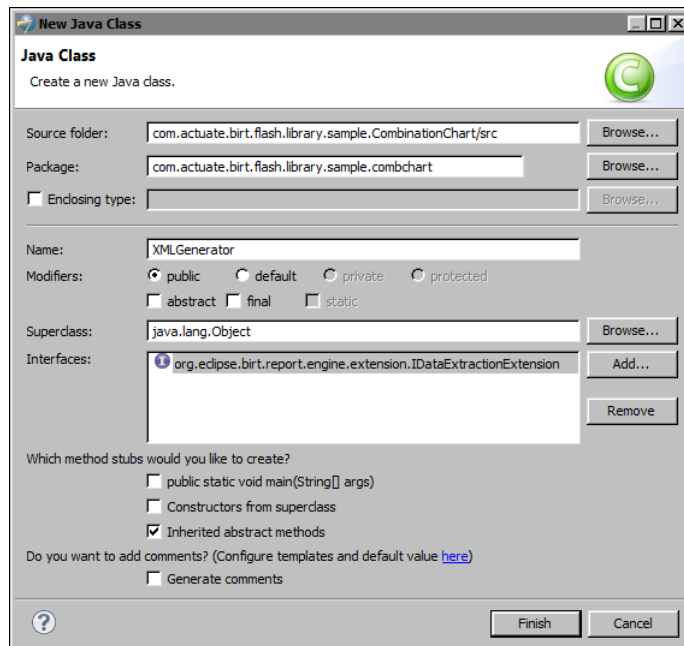


Figure 18-31 Properties for the class

- 6 Choose Finish. In Package Explorer, the class, XMLGenerator.java, appears in the plug-in's src folder. The content of XMLGenerator.java appears in the editor, as shown in Figure 18-32.

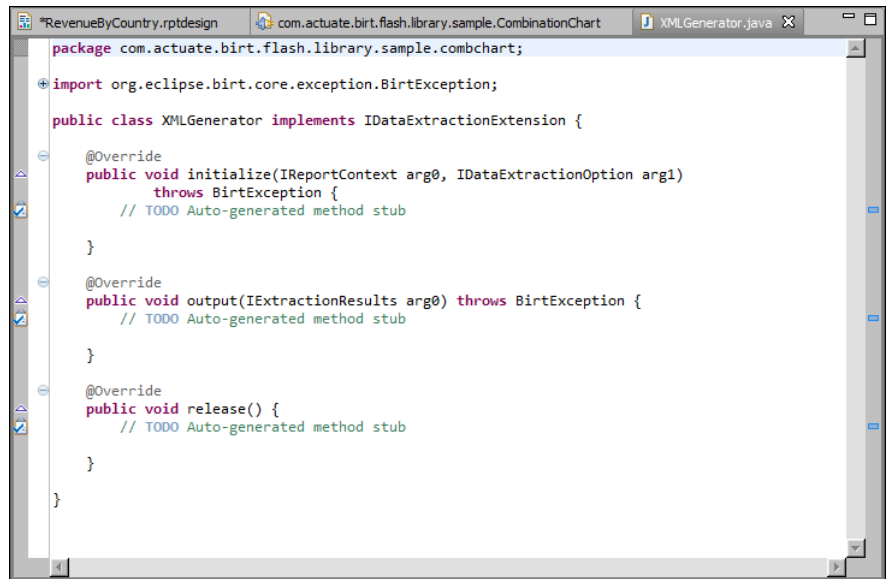


Figure 18-32 Code template for XMLGenerator.java

Task 8: Implement methods in the class

When you create a Java class using the wizard, Eclipse generates a code template, as shown in Figure 18-32. As the class declaration shows, the XMLGenerator class implements the IDataExtractionExtension interface. The interface defines three methods, which your class must implement. Perform the following tasks in this section:

- Import the required packages.
- Implement the initialize() method.
- Implement the output() method.
- Implement the release() method.

Import the required packages

The code template contains import statements to include the packages that contain the classes your code needs. Verify that the code contains the following import statements. If any are missing, add them.

```
import java.io.IOException;
import java.io.OutputStream;
import java.io.UnsupportedEncodingException;

import org.eclipse.birt.core.exception.BirtException;
import org.eclipse.birt.report.engine.api.IDataExtractionOption;
import org.eclipse.birt.report.engine.api.IDataIterator;
import org.eclipse.birt.report.engine.api.IExtractionResults;
import org.eclipse.birt.report.engine.api.script.IReportContext;
import org.eclipse.birt.report.engine.extension.
    IDataExtractionExtension;
```

Implement the initialize() method

The initialize() method is the first method that the BIRT report engine calls before rendering the Flash object. Use this method to initialize resources.

- 1 Add the following line after the class declaration line (the line that begins with `public class XMLGenerator`):

```
private IDataExtractionOption option;
```

This statement declares a private variable, `option`, of type `IDataExtractionOption`. The initialize() method takes an input argument of this type.

- 2 Add the following line after the initialize() method declaration:

```
this.option = arg1;
```

This statement assigns the `option` variable to the input argument `arg1`.

Listing 18-3 shows the edited code in the class definition and initialize() method.

Listing 18-3 Class definition and initialize() method implementation

```
public class XMLGenerator implements IDataExtractionExtension {
    private IDataExtractionOption option;

    public void initialize(IReportContext arg0,
        IDataExtractionOption arg1)
        throws BirtException {
        this.option = arg1;
    }
}
```

Implement the output() method

The output() method is where you write the code to build the XML data to pass to the Flash chart. Listing 18-4 shows the code to write to replace the output() code stub. Some of the XML strings that define chart attributes are long. You must type each string in a single line. Each string ends with a semicolon (;).

You can copy the code from the online help topic with the same title as this section title. In the Actuate BIRT Guide online help, choose Using the Flash object library—Tutorial 4: Creating a Flash chart that gets data through the data URL variable—Implement methods in the class.

Read the comments embedded in the code to understand what each section of code does. For information about the XML elements and attributes used to build the XML data, see the sample XML for the 2D dual-Y combination chart. In the online help for Flash charts, choose Chart XML API—Combination Charts—2D Dual Y Combination.

Listing 18-4 output() method implementation

```
public void output(IExtractionResults results) throws
    BirtException {
    //Get the handle of the OutputStream defined in the
    //IDataExtractionOption interface
    OutputStream stream = option.getOutputStream();

    //If the stream is not null, define three string buffers.
    //The xml buffer is used to build the full XML.
    //The xmlSales and xmlQty buffers store the data for the
    //Revenue and Quantity series.
    if ( stream != null )
    {
        StringBuffer xml = new StringBuffer();
        StringBuffer xmlSales = new StringBuffer();
        StringBuffer xmlQty = new StringBuffer();

        //Start building the XML. This part defines chart attributes.
        //Type this XML string in a single line.
        xml.append( "<chart caption='Revenue by Country'
        PYAxisName='Revenue' SYAxisName='Quantity'
        numVisiblePlot='8' showValues='0' numberPrefix='$'
        useRoundEdges='1' labelDisplay='ROTATE' >");

        //If results is not null, iterate through the data set rows.
        //Add the values to the data series. Add the data and
        //additional formatting attributes to the XML.
        //Type each appended XML string in a single line.
        if ( results != null )
        {
            IDataIterator itr = results.nextResultIterator();
            xml.append( "<categories >" );
            xmlSales.append("<dataset seriesName='Revenue' >");
            xmlQty.append("<dataset seriesName='Quantity'
                parentYAxis='S' >");
```

```

while ( itr.next() )
{
    String country =
        String.valueOf(itr.getValue("COUNTRY"));
    String sales = String.valueOf(itr.getValue("SALES"));
    String qty = String.valueOf(itr.getValue("QUANTITY"));
    xml.append( "<category label='"+ country + "' />" );
    xmlSales.append( "<set value='"+ sales + "' />" );
    xmlQty.append( "<set value='"+ qty + "' />" );
}
xmlSales.append("</dataset>");
xmlQty.append("</dataset>");
xml.append( "</categories>" );
xml.append(xmlQty);
xml.append(xmlSales);
xml.append("<trendlines>");
xml.append(" <line startValue='400000' color='91C728'
    displayValue='Target' showOnTop='1'/> ");
xml.append("</trendlines>");
xml.append("<styles> ");
xml.append("<definition> <style name='CanvasAnim'
    type='animation' param='_xScale' start='0'
    duration='1' /> </definition> ");
xml.append(" <application> <apply toObject='Canvas'
    styles='CanvasAnim' /> </application> ");
xml.append("</styles>");
xml.append("</chart>");

//Write the buffer to the output stream.
//Use the try/catch blocks to catch exceptions.
try
{
    stream.write( xml.toString().getBytes("UTF-8"));
    stream.flush();
}
catch ( UnsupportedEncodingException e )
{
    e.printStackTrace();
}
catch ( IOException e )
{
    e.printStackTrace();
}
}
}
}

```


Implement the release() method

Use the release() method to clean up allocated resources.

- 1 Add the following line after the release() method declaration:

```
this.option = null;
```

This statement releases the handle to the output stream.

- 2 Save your changes to XMLGenerator.java. You have finished implementing the class and the plug-in.

Task 9: Deploy the plug-in

In this procedure, deploy the plug-in using Eclipse's Export utility. This utility creates a plug-in JAR file and copies it to a specified folder.

- 1 From the main menu, choose File→Export.
- 2 In Export, expand Plug-in Development, and select Deployable plug-ins and fragments, as shown in Figure 18-33.

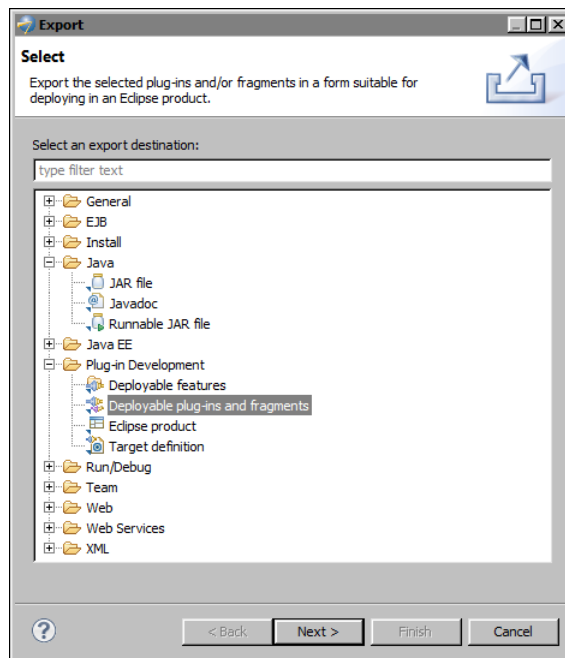


Figure 18-33 Selecting Deployable plug-ins and fragments

- 3 Choose Next. In Export, Available Plug-ins and Fragments displays the plug-in you created.

- 4 Select `com.actuate.birt.flash.library.sample.CombinationChart`.
- 5 In Destination—Directory, type the following path, if necessary.
For Windows 7:
`C:\Program Files (x86)\Actuate11\MyClasses\eclipse`
For Windows XP:
`C:\Program Files\Actuate11\MyClasses\eclipse`
All custom plug-ins that Actuate BIRT Designer uses must be placed in this folder.
- 6 Choose Finish.
- 7 Restart Actuate BIRT Designer. This step is required for the new plug-in to take effect.

Task 10: Create the dataURL variable

In this procedure, create the dataURL variable to pass the XML data generated by the plug-in to the Flash chart.

- 1 Open the report design perspective by choosing Report Design in the toolbar.
- 2 Choose `RevenueByCountry.rptdesign`, the report you created earlier in this tutorial.
- 3 In the report layout, select the Flash object.
- 4 In Property Editor, choose the Flash Variables tab.
- 5 In Flash Variables, choose Add.
- 6 In Add Variables, do the following:
 - 1 In Name, type:
`dataURL`
 - 2 In Expression, choose the JavaScript expression builder.
- 7 In the JavaScript expression builder, type the following expression:
`flashContext.createDataURL("CombChartXMLFormat", true, null);`
The first argument, `CombChartXMLFormat`, is the format specified in the extension properties of the plug-in. The second argument, `true`, specifies that the URL is encoded. The third argument, `null`, specifies that there are no custom parameter names and values to pass to the URL.
- 8 Choose OK.
- 9 Preview the report. The Flash chart should look like the one shown in Figure 18-34. The chart has two *y* axes. The left axis displays revenue values

and the right axis displays quantity values. The column chart presents revenue data and the line chart presents quantity data.

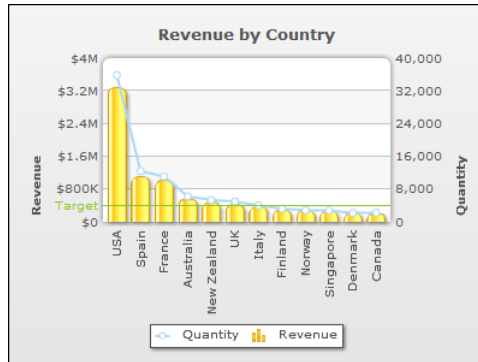


Figure 18-34 Preview of Flash chart

Debugging a Flash object

Because using a Flash object from the Flash object library requires programming and typing XML content, implementation errors are common. To troubleshoot errors, use the following debugging tools:

- The JavaScript debugger in Actuate BIRT Designer. Use this tool to debug the JavaScript code you write when using the dataXML variable to pass data to the Flash object.
- The Eclipse debugger. Use this tool to debug the entire report and the Java classes that the report uses. This tool is useful for debugging the Java class you write when using the dataURL variable to pass data to the Flash object.
- The debug mode provided by Flash objects. Use this method to see the processing that occurs in the Flash object.

Information about using the JavaScript debugger and the Eclipse debugger is provided in the Eclipse Series book, *Integrating and Extending BIRT*. This section provides instructions for using the debug mode in Flash objects.

Using the Flash object's debug mode

The debug mode provides a description and status of the Flash object. When you run a report in debug mode and there are errors generating the Flash object, the debugger lists the errors. If the Flash object runs without errors, the debugger shows the XML used to create the Flash object. Figure 18-35 shows an example of the type of information displayed by the debugger.

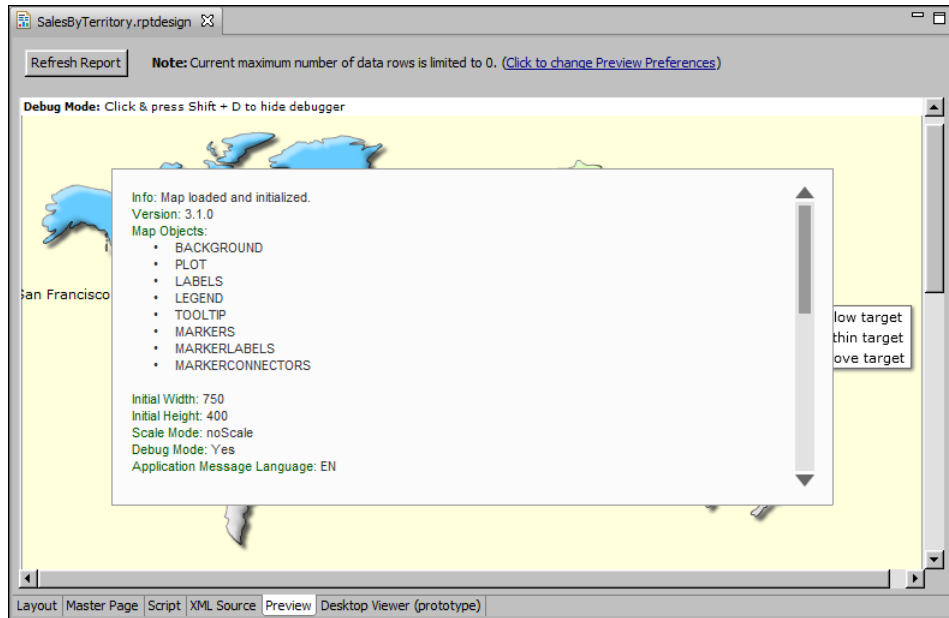


Figure 18-35 Information displayed by the Flash object debugger

How to enable debug mode

- 1 In the report layout, select the Flash object to debug.
- 2 In Property Editor, choose Flash Variables, then choose Add.
- 3 In Add Variables, specify the following information, then choose OK:
 - 1 In Name, type:
debugMode
 - 2 In Expression, type:
1
- 4 Preview the report. A debug window opens on top of the Flash object, as shown in Figure 18-35. To hide the debug window, click it while pressing Shift+D. Use the same keystrokes to redisplay the debug window.

How to disable debug mode

Edit the debugMode variable. Set Expression to 0.

Resolving errors

For information about the types of errors, their typical causes, and ways to resolve them, see the Debugging topics in the InfoSoft online documentation.

Figure 18-36 shows a portion of the “Basic Troubleshooting” topic under “Debugging Your Maps.”



Figure 18-36 Troubleshooting topic in the InfoSoft online documentation

Writing expressions using EasyScript

This chapter contains the following topics:

- About EasyScript
- Using the EasyScript expression builder
- Changing the default expression syntax
- Functions
- Operators

About EasyScript

EasyScript is an expression syntax similar to the syntax used in Excel formulas. Like Excel, EasyScript provides functions for performing calculations on report data. In Actuate BIRT Designer, EasyScript is supported in most places an expression is required. For example, when specifying an expression for a computed column, a column binding, a filter condition, or a map rule, you can use either JavaScript or EasyScript.

Choosing between EasyScript and JavaScript

You can use both JavaScript and EasyScript expressions in a report. For simple expressions or common calculations, the choice is often based on syntax familiarity or simplicity. Users who work with Excel functions will find EasyScript syntax familiar and easy to use.

The following example is an EasyScript expression that rounds values in a Price field to the nearest integer:

```
ROUND([Price])
```

The following example is the equivalent JavaScript expression:

```
Math.round(row["Price"])
```

Both expressions are straightforward, although one could argue that the EasyScript syntax is simpler. Now, compare the expressions used to round the Price values to 2 decimal places. In the following expressions, the first shows EasyScript syntax, and the second shows JavaScript syntax:

```
ROUND([Price], 2)
Math.round(row["Price"]*100)/100
```

In this case, the EasyScript syntax is clearly simpler and more intuitive. The EasyScript `ROUND()` function provides a second argument that lets you specify the number of decimal places to which to round the number. The JavaScript `round()` function does not, and, therefore, requires additional mathematical operations.

If a report needs complex calculations that require lines of code or calculations that cannot be done with EasyScript, use JavaScript. For information about writing JavaScript expressions, see *BIRT: A Field Guide*.

Syntax rules

When writing an EasyScript expression, observe the following rules:

- Enclose field names within square brackets (`[]`), for example, `[CustomerID]`.

- Field names and function names are case-sensitive. All function names are uppercase.
- When creating an expression that contains a literal date, always type the date according to the conventions of the US English locale. For example, if working in the French locale, type 07/10/2010 to represent July 10, 2010. Do not type 10/07/2010, which is the convention for dates in the French locale. The following expression, which calculates the number of days from the current date to Christmas, includes a literal date:

```
DIFF_DAY(TODAY(), "12/25/10")
```

- When creating an expression that contains a literal number, always type the number according to the conventions of the US English locale. Use a period (.), not a comma (,) as the decimal separator.

Using the EasyScript expression builder

When specifying an expression, the JavaScript syntax is the default. Figure 19-1 shows the icon that represents JavaScript syntax. Clicking on this icon opens the JavaScript expression builder.

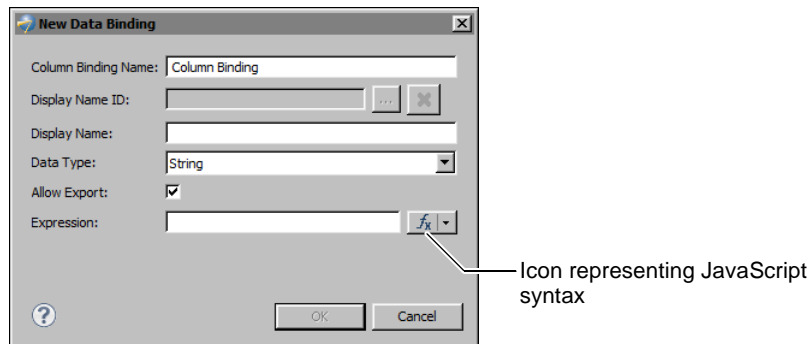


Figure 19-1 An expression property set to use a JavaScript expression

To switch to EasyScript syntax, click the arrow button next to the JavaScript syntax icon and choose EasyScript Syntax, as shown in Figure 19-2.

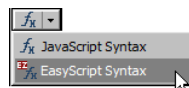


Figure 19-2 Switching to EasyScript

This action opens the EasyScript expression builder, shown in Figure 19-3.

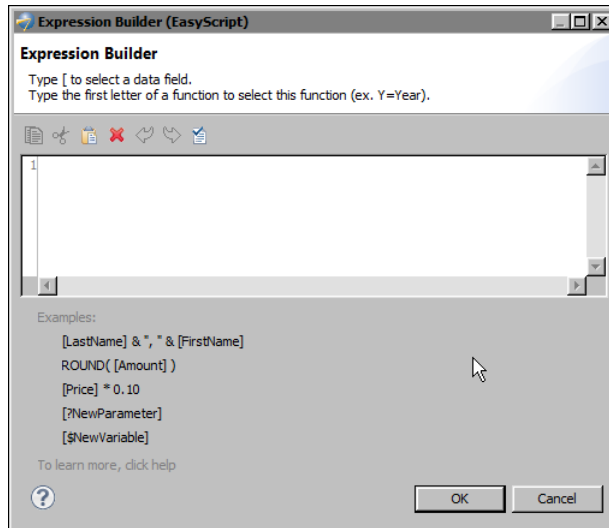


Figure 19-3 EasyScript expression builder

Like the JavaScript expression builder, the EasyScript expression builder provides help selecting functions and fields to use in an expression. To use a function in an expression, type the first letter of the function, then select a function from the list that appears. To use a field, type the left square bracket ([), then select a field from the list.



When you finish creating an expression, choose Validate to verify the expression.

Changing the default expression syntax

If you consistently use EasyScript or use it more than JavaScript, you can change the Default Syntax property in Preferences to EasyScript syntax. To access this property, select Window→Preferences, and choose Report Design—Expression Syntax. After changing the default syntax, the EasyScript syntax icon appears by default every time you create a new expression.

The Default Syntax property does not convert existing JavaScript expressions to EasyScript expressions, and vice versa. To change the syntax of an expression, you must select the syntax type and edit the expression accordingly.

Functions

This section is a complete reference to all of the EasyScript functions in Actuate BIRT Designer. This reference organizes the functions alphabetically. Each

function entry includes a general description of the function, its syntax, the arguments to the function, the result the function returns, and an example that shows typical usage.

ABS()

Returns the absolute value of a number without regard to its sign. For example, 6 is the absolute value of 6 and -6.

Syntax ABS(number)

Argument **number**
The number for which you want to find the absolute value.

Returns An integer that represents the absolute value of a specified number.

Example The following example returns the absolute value for each number in the TemperatureCelsius field:

```
ABS([TemperatureCelsius])
```

ADD_DAY()

Adds a specified number of days to a date value.

Syntax ADD_DAY(date, n)

Arguments **date**
The date or date expression that represents the start date.

n
The number of days to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

Returns The date value that results from adding the specified number of days to the start date.

Example The following example adds 15 days to each date value in the InvoiceDate field:

```
ADD_DAY([InvoiceDate], 15)
```

ADD_HOUR()

Adds a specified number of hours to a date value.

Syntax ADD_HOUR(date, n)

ADD_MINUTE()

Arguments **date**

The date or date expression that represents the start date. If a start date does not have a time value, the function assumes the time is midnight, 12:00 AM.

n

The number of hours to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

Returns The date-and-time value that results from adding the specified number of hours to the start date.

Example The following example adds eight hours to each date value in the ShipDate field:

```
ADD_HOUR([ShipDate], 8)
```

ADD_MINUTE()

Adds a specified number of minutes to a date value.

Syntax ADD_MINUTE(date, n)

Arguments **date**

The date or date expression that represents the start date. If a start date does not have a time value, the function assumes the time is midnight, 12:00 AM.

n

The number of minutes to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

Returns The date-and-time value that results from adding the specified number of minutes to the start date.

Example The following example subtracts 30 minutes from each date in the StartTime field:

```
ADD_MINUTE([StartTime], -30)
```

ADD_MONTH()

Adds a specified number of months to a date value.

Syntax ADD_MONTH(date, n)

Arguments **date**

The date or date expression that represents the start date.

n

The number of months to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

Returns The date value that results from adding the specified number of months to the start date. This function always returns a valid date. If necessary, the day part of the resulting date is adjusted downward to the last day of the resulting month in the resulting year. For example, if you add one month to 1/31/08, `ADD_MONTH()` returns 2/29/08, not 2/31/08 or 2/28/08, because 2008 is a leap year.

Example The following example adds two months to each date value in the `InitialRelease` field:

```
ADD_MONTH([InitialRelease], 2)
```

ADD_QUARTER()

Adds a specified number of quarters to a date value.

Syntax `ADD_QUARTER(date, n)`

Arguments **date**

The date or date expression that represents the start date.

n

The number of quarters to add to the start date. If you specify a negative number, the result is the number subtracted from the start date.

Returns The date value that results from adding the specified number of quarters to the start date. A quarter is equal to three months. For example, if you add two quarters to 9/22/08, `ADD_QUARTER()` returns 3/22/09.

Example The following example adds two quarters to each date value in the `ForecastClosing` field:

```
ADD_QUARTER([ForecastClosing], 2)
```

ADD_SECOND()

Adds a specified number of seconds to a date value.

Syntax `ADD_SECOND(date, n)`

Arguments **date**

The date or date expression that represents the start date. If a start date does not have a time value, the function assumes the time is midnight, 12:00 AM.

n

The number of seconds to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

ADD_WEEK()

Returns The date-and-time value that results from adding the specified number of seconds to the start date.

Example The following example adds 30 seconds to each date value in the StartTime field:

```
ADD_SECOND([StartTime], 30)
```

ADD_WEEK()

Adds a specified number of weeks to a date value.

Syntax ADD_WEEK(date, n)

Arguments **date**

The date or date expression that represents the start date.

n

The number of weeks to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

Returns The date value that results from adding the number of weeks to the start date.

Example The following example adds two weeks to each date value in the OrderDate field:

```
ADD_WEEK([OrderDate], 2)
```

ADD_YEAR()

Adds a specified number of years to a date value.

Syntax ADD_YEAR(date, n)

Arguments **date**

The date or date expression that represents the start date.

n

The number of years to add to the start date. If you specify a negative number, the result is as if the number is subtracted from the start date.

Returns The date value that results from adding the number of years to the start date.

Example The following example adds five years to each date value in the HireDate field:

```
ADD_YEAR([HireDate], 5)
```

BETWEEN()

Tests if a value is between two specified values.

Syntax	BETWEEN(source, target1, target2)
Arguments	<p>source The value to test. The value can be a string, numeric, or date value.</p> <p>target1 The first value in the range of values to compare to. String and date values must be enclosed in double quotation marks (" ").</p> <p>target2 The second value in the range of values to compare to. String and date values must be enclosed in double quotation marks (" ").</p>
Returns	True if source is between target1 and target2, or equal to target1 or target2; returns false otherwise.
Examples	<p>The following example tests each value in the SalesTotal field to see if the value is between 10000 and 20000:</p> <pre>BETWEEN([SalesTotal], 10000, 20000)</pre> <p>The following example tests each value in the CustomerName field to see if the value is between A and M:</p> <pre>BETWEEN([CustomerName], "A", "M")</pre> <p>The following example tests each value in the ReceiptDate field to see if the value is between 10/01/07 and 12/31/07:</p> <pre>BETWEEN([ReceiptDate], "10/01/07", "12/31/07")</pre> <p>The following example uses BETWEEN() in conjunction with the IF() and ADD_DAY() functions to calculate a shipment date. If an orderDate value is in December 2007 (between 12/1/07 and 12/31/07), add five days to the orderDate value. If an orderDate value is in a month other than December, add three days to the orderDate value.</p> <pre>IF(BETWEEN([orderDate], "12/01/07", "12/31/07"), ADD_DAY([orderDate], 5), ADD_DAY([orderDate], 3))</pre>

CEILING()

Rounds a number up to the nearest specified multiple.

Syntax	CEILING(number, significance)
Arguments	<p>number The number to round up.</p> <p>significance The multiple to round number to.</p>

DAY()

Returns The number that results from the rounding. If the specified number value is an exact multiple of significance, no rounding occurs.

Examples CEILING() is commonly used to round up prices. For example, to avoid dealing with pennies, you can round prices in a Price field up to the nearest nickel with the following expression:

```
CEILING([Price], 0.05)
```

If the Price value is 20.52, CEILING() returns 20.55.

The following example rounds prices up to the nearest dime:

```
CEILING([Price], 0.1)
```

If the Price value is 20.52, CEILING() returns 20.60. If the Price value is 20.50, CEILING() returns 20.50. No rounding occurs because 20.50 is already a multiple of 0.1.

The following example rounds prices up to the nearest dollar:

```
CEILING([Price], 1)
```

If the Price value is 20.30, CEILING() returns 21.0.

DAY()

Returns a number from 1 to 31 that represents the day of the month.

Syntax DAY(date)

Argument **date**
The date or date expression from which you want to extract the day.

Returns The number of the day of the month for the specified date value.

Example The following example gets the number of the day for each date value in the ShipDate field:

```
DAY([ShipDate])
```

DIFF_DAY()

Calculates the number of days between two date values.

Syntax DIFF_DAY(date1, date2)

Arguments **date1**
The first date or date expression to use in the calculation.

date2
The second date or date expression to use in the calculation.

- Returns** The number of days between date1 and date2. If date1 is earlier than date2, the result is a positive number; otherwise the result is a negative number.
- Example** The following example calculates the time it takes to pay invoices by computing the number of days between each value in the invoiceDate field and each value in the paymentDate field:

```
DIFF_DAY([invoiceDate],[paymentDate])
```

The following example calculates the number of days from an order date to Christmas:

```
DIFF_DAY([orderDate], "12/25/10")
```

The following example calculates the number of days from the current date to Christmas. TODAY() is a function that returns the current date.

```
DIFF_DAY(TODAY(), "12/25/10")
```

DIFF_HOUR()

Calculates the number of hours between two date values.

- Syntax** DIFF_HOUR(date1, date2)
- Arguments**
- date1**
The first date or date expression to use in the calculation. If the date does not have a time value, the function assumes the time is midnight, 12:00 AM.
- date2**
The second date or date expression to use in the calculation. If the date does not have a time value, the function assumes the time is midnight, 12:00 AM.
- Returns** The number of hours between date1 and date2.
- Example** The following example calculates the number of hours between each value in the startTime field and each value in the finishTime field:
- ```
DIFF_HOUR([startTime],[finishTime])
```
- The following example calculates the number of hours from the current date to Christmas. NOW() is a function that returns the current date and time.
- ```
DIFF_HOUR(NOW(), "12/25/10")
```

DIFF_MINUTE()

Calculates the number of minutes between two date values.

- Syntax** DIFF_MINUTE(date1, date2)

DIFF_MONTH()

Arguments **date1**

The first date or date expression to use in the calculation. If the date does not have a time value, the function assumes the time is midnight, 12:00 AM.

date2

The second date or date expression to use in the calculation. If the date does not have a time value, the function assumes the time is midnight, 12:00 AM.

Returns The number of minutes between date1 and date2.

Example The following example calculates the number of minutes between each value in the startTime field and each value in the finishTime field:

```
DIFF_MINUTE([startTime],[finishTime])
```

The following example calculates the number of minutes from the current date to Christmas. NOW() is a function that returns the current date and time.

```
DIFF_MINUTE(NOW(), "12/25/10")
```

DIFF_MONTH()

Calculates the number of months between two date values.

Syntax DIFF_MONTH(date1,date2)

Arguments **date1**

The first date or date expression to use in the calculation.

date2

The second date or date expression to use in the calculation.

Returns The number of months between date1 and date2. The function calculates the difference by subtracting the month number of date1 from the month number of date2. For example, if date1 is 8/1/08 and date2 is 8/31/08, DIFF_MONTH() returns 0. If date1 is 8/25/08 and date2 is 9/5/08, DIFF_MONTH() returns 1.

Example The following example calculates the number of months between each value in the askByDate field and each value in the ShipByDate field:

```
DIFF_MONTH([askByDate],[shipByDate])
```

The following example calculates the number of months from each value in the hireDate field to the end of the year:

```
DIFF_MONTH([hireDate], "12/31/10")
```

DIFF_QUARTER()

Calculates the number of quarters between two date values.

Syntax	DIFF_QUARTER(date1, date2)
Arguments	<p>date1 The first date or date expression to use in the calculation.</p> <p>date2 The second date or date expression to use in the calculation.</p>
Returns	The number of quarters between date1 and date2. DIFF_QUARTER() calculates the difference by subtracting the quarter number of date1 from the quarter number of date2. For example, if date1 is 1/1/10 and date2 is 3/31/10, DIFF_QUARTER() returns 0 because both dates are in quarter 1. If date1 is 3/31/10 and date2 is 4/15/10, DIFF_QUARTER() returns 1 because date1 is in quarter 1 and date2 is in quarter 2.
Example	<p>The following example calculates the number of quarters between each value in the PlanClosing field and each value in the ActualClosing field:</p> <pre>DIFF_QUARTER([PlanClosing], [ActualClosing])</pre> <p>The following example calculates the number of quarters from each value in the orderDate field to the end of the year:</p> <pre>DIFF_QUARTER([orderDate], "12/31/10")</pre>

DIFF_SECOND()

Calculates the number of seconds between two date values.

Syntax	DIFF_SECOND(date1, date2)
Arguments	<p>date1 The first date or date expression to use in the calculation. If the date does not have a time value, the function assumes the time is midnight, 12:00 AM.</p> <p>date2 The second date or date expression to use in the calculation. If the date does not have a time value, the function assumes the time is midnight, 12:00 AM.</p>
Returns	The number of seconds between date1 and date2.
Example	<p>The following example calculates the number of seconds between each value in the startTime field and each value in the finishTime field:</p> <pre>DIFF_SECOND([startTime], [finishTime])</pre> <p>The following example calculates the number of seconds from the current date to Christmas. NOW() is a function that returns the current date and time.</p> <pre>DIFF_SECOND(NOW(), "12/25/10")</pre>

DIFF_WEEK()

Calculates the number of weeks between two date values.

Syntax DIFF_WEEK(date1, date2)

Arguments **date1**

The first date or date expression to use in the calculation.

date2

The second date or date expression to use in the calculation.

Returns The number of weeks between date1 and date2. The function calculates the difference by subtracting the week number of date1 from the week number of date2. For example, if date1 is 1/1/10 (week 1 of the year), and date2 is 1/4/10 (week 2 of the year), DIFF_WEEK() returns 1.

Example The following example calculates the number of weeks between each value in the askByDate field and each value in the shipByDate field:

```
DIFF_WEEK([askByDate],[shipByDate])
```

The following example calculates the number of weeks from each value in the orderDate field to the end of the year:

```
DIFF_WEEK([orderDate], "12/31/10")
```

DIFF_YEAR()

Calculates the number of years between two date values.

Syntax DIFF_YEAR(date1, date2)

Arguments **date1**

The first date or date expression to use in the calculation.

date2

The second date or date expression to use in the calculation.

Returns The number of years between date1 and date2. The function calculates the difference by subtracting the year number of date1 from the year number of date2. For example, if date1 is 1/1/10 and date2 is 12/31/10, DIFF_YEAR() returns 0. If date1 is 11/25/09 and date2 is 1/5/10, DIFF_YEAR() returns 1.

Example The following example calculates the number of years between each value in the HireDate field and each value in the TerminationDate field:

```
DIFF_YEAR([HireDate],[TerminationDate])
```

The following example calculates the number of years from each value in the HireDate field to the current date. TODAY() is a function that returns the current date.

```
DIFF_YEAR([HireDate], TODAY())
```

FIND()

Finds the location of a substring in a string.

Syntax FIND(target, source)

FIND(target, source, index)

Arguments **target**

The substring to search for. The search is case-sensitive.

source

The string in which to search.

index

The position in str where the search starts.

Returns

The numerical position of the substring in the string. The first character of a string starts at 1. If the substring is not found, FIND() returns 0.

Examples

The following example searches for the substring, Ford, in each ProductName value:

```
FIND("Ford", [ProductName])
```

If the product name is 1969 Ford Falcon, FIND() returns 6.

The following example searches for the first hyphen (-) in each product code:

```
FIND("-", [ProductCode])
```

If the product code is ModelA-1234-567, FIND() returns 7.

The following example uses FIND() in conjunction with the LEFT() function to display the characters that precede the hyphen in a product code. The LEFT() function extracts a substring of a specified length, starting from the first character. In this example, the length of the substring to display is equal to the numerical position of the hyphen character.

```
LEFT([ProductCode], FIND("-", [ProductCode]))
```

If the product code is ModelA-1234, the expression returns the following string:

```
ModelA
```

IF()

Returns one value if a specified condition evaluates to true, or another value if the condition evaluates to false.

Syntax IF(c, vt, vf)

Arguments **c**
The condition to test.

vt
The value to return if the condition evaluates to true.

vf
The value to return if the condition evaluates to false.

Returns Returns the vt value if c is TRUE or the vf value if c is false.

Example The following example calculates and displays different discount amounts based on the value in the Total field. If the Total value is greater than 5000, the discount is 15%. Otherwise, the discount is 10%.

```
IF([Total]>5000, [Total]*15%, [Total]*10%)
```

The following example uses IF() in conjunction with the BETWEEN() and ADD_DAY() functions to calculate a shipment date. If an orderDate value is in December 2010 (between 12/1/10 and 12/31/10), add five days to the orderDate value. If an orderDate value is in a month other than December, add three days to the orderDate value.

```
IF(BETWEEN([orderDate], "12/1/10", "12/31/10"),  
  ADD_DAY([orderDate], 5), ADD_DAY([orderDate], 3))
```

The following example checks each value in the Office field. If the value is Boston, San Francisco, or NYC, display U.S. If the value is something other than Boston, San Francisco, or NYC, display Europe and Asia Pacific.

```
IF([Office]="Boston" OR [Office]="San Francisco" OR  
  [Office]="NYC", "U.S.", "Europe and Asia Pacific")
```

IN()

Tests if a value is equal to a value in a list.

Syntax IN(source, target1,..., targetN)

Arguments **source**
The value to test. The value can be a string, numeric, or date value.

target1, ..., targetN
The value or values to compare to.

- Returns** True if the source value is equal to one of the target values; returns false otherwise.
- Example** The following example tests if New Haven, Baltimore, or Cooperstown are values in the city field. If any one of the cities is in the field, IN() returns true.
- ```
IN([city], "New Haven", "Baltimore", "Cooperstown")
```
- The following example tests if 9/15/08 or 9/30/08 are values in the payDate field:
- ```
IN([payDate], "9/15/08", "9/30/08")
```
- The following example uses IN() in conjunction with the IF() function to test if Ships or Trains are values in the ProductLine field. If Ships or Trains is a value in the field, display Discontinued Item; otherwise, display the product line value as it appears in the field.
- ```
IF(IN([ProductLine], "Ships", "Trains"), "Discontinued Item",
[ProductLine])
```

## ISNULL( )

Tests if a value in a specified field is a null value. A null value means that no value exists.

- Syntax** ISNULL(source)
- Argument** **source**  
The field in which to check for null values.
- Returns** True if a value in the specified field is a null value; returns false otherwise.
- Example** The following example uses ISNULL( ) in conjunction with the IF( ) function to test for null values in the BirthDate field. If there is a null value, display No date specified; otherwise display the BirthDate value.
- ```
IF(ISNULL([BirthDate]), "No date specified", [BirthDate])
```

LEFT()

Extracts a substring from a string, starting from the left-most, or first, character.

- Syntax** LEFT(source)
LEFT(source, n)
- Arguments** **source**
The string from which to extract a substring.

LEN()

n

The number of characters to extract, starting from the first character.

Returns A substring of a specific length.

- If you omit **n**, the number of characters to extract, the function returns the first character only.
- If **n** is zero, the function returns an empty string.
- If **n** is greater than the length of the string, the function returns the entire string.

Example The following example displays the first letter of each name in the CustomerName field:

```
LEFT([CustomerName])
```

The following example uses the LEFT() and FIND() functions to display the characters that precede the hyphen in a product code:

```
LEFT([ProductCode], FIND("-", [ProductCode]))
```

If the product code is ModelA-1234, the expression returns the following string:

```
ModelA
```

LEN()

Counts the number of characters in a string.

Syntax LEN(source)

Argument **source**
The string expression to evaluate.

Returns The number of characters in the specified string.

Example The following example returns the length of each value in the ProductCode field:

```
LEN([ProductCode])
```

The following example uses LEN() in conjunction with the RIGHT() and FIND() functions to display the characters that appear after the hyphen in a product code. RIGHT() extracts a substring of a specified length, starting from the last character. In this example, the length of the entire string returned by LEN() minus the length up to the hyphen is the number of characters to display:

```
RIGHT([ProductCode], LEN([ProductCode]) - FIND("-", [ProductCode]))
```

If the product code is ModelA-Ford, the expression returns Ford.

LIKE()

Tests if a string matches a pattern.

Syntax LIKE(source, pattern)

source

The string to evaluate.

pattern

The string pattern to match. You must enclose the pattern in double quotation marks (" "). The match is case-sensitive. You can use the following special characters in a pattern:

- A percent character (%) matches zero or more characters. For example, %ace% matches any string value that contains the substring ace, such as Facebook, and MySpace. It does not match Ace Corporation because this string contains a capital A, and not the lowercase a.
- An underscore character (_) matches exactly one character. For example, t_n matches tan, ten, tin, and ton. It does not match teen or tn.

To match a literal percent (%), underscore (_), precede those characters with two backslash (\) characters. For example, to see if a string contains M_10, specify the following pattern:

```
"%M\\_10%"
```

Returns True if the string matches the pattern; returns false otherwise.

Example The following example returns true for values in the customerName field that start with D:

```
LIKE([customerName], "D%")
```

The following example returns true for productCode values that contain the substring Ford:

```
LIKE([productCode], "%Ford%")
```

The following example uses two LIKE() expressions to look for the substrings "Ford" or "Chevy" in each ProductName value. If a product name contains either substring, the expression displays U.S. Model; otherwise, it displays Imported Model.

```
IF((LIKE([ProductName], "%Ford%") = TRUE) OR (LIKE([ProductName], "%Chevy%") = TRUE)), "U.S. model", "Imported Model")
```

LOWER()

Converts all letters in a string to lowercase.

Syntax LOWER(source)

Argument **source**
The string to convert to lowercase.

Returns The specified string in all lowercase letters.

Example The following example displays all the string values in the productLine field in lowercase:

```
LOWER ( [productLine] )
```

MATCH()

Tests if a string matches a pattern. The pattern must use JavaScript regular expression syntax.

Syntax MATCH(source, pattern)

Arguments **source**
The string to evaluate.

pattern

The string pattern to match. You must enclose the pattern in quotation marks (" "). In JavaScript regular expression syntax, a pattern is enclosed within a pair of forward slash (/) characters. However, for this argument, the forward slash characters are optional. For example, the following values are equivalent:

```
"smith"  
"/smith/"
```

You can use any special character supported by JavaScript regular expressions, such as the following:

- A question mark (?) matches zero or one occurrence of the character previous to it. For example, "te?n" matches tn, ten, and often. It does not match teen or intern.
- An asterisk (*) matches zero or any number of occurrences of the character previous to it. For example, "te*n" matches tn, ten, often, and teen. It does not match intern.
- A period (.) matches any character. For example, "te.*" matches ten, often, teen, and intern.

- A caret (^) specifies that the pattern to look for is at the beginning of a string. For example, "^ten" matches ten, tennis, and tense. It does not match often or pretend.
- An i character specifies a case-insensitive search. For example, "/smith/i" matches Smith, blacksmith, and Smithsonian. In this case, the pair of forward slashes is required.

To match a special character literally, precede the special character with two backslash (\) characters. For example, to check if a string contains S*10, specify the following pattern:

```
"/S\\*10/"
```

Returns True if the string matches the pattern; returns false otherwise.

Examples The following example returns true for values in the ProductCode field that start with S18:

```
MATCH([ProductCode], "^S18/")
```

The following example uses MATCH() to check if the values in the SKU field contain the letters EM followed by a number that ends with 99. If there is a match, display Discontinued; otherwise, display the SKU value.

```
IF(MATCH([SKU], "/EM.*99/"), "Discontinued", [SKU])
```

MOD()

Returns the remainder after a number is divided by another.

Syntax MOD(number, divisor)

Arguments **number**

The number to divide.

divisor

The number by which to divide the number value. You must specify a non-zero number.

Returns The remainder after the number value is divided by the divisor value. Different applications and programming languages define the modulo operation differently when either the dividend or the divisor are negative. For example, in EasyScript and Excel, MOD(-5, 3) returns 1. However, in JavaScript and most databases, the modulo operation returns -2.

Examples The following examples shows the results that the function returns for specific numbers:

```
MOD(10, 5) // returns 0
```

MONTH()

```
MOD(11, 5) // returns 1
MOD(12, 5) // returns 2
MOD(-10, 5) //returns 0
MOD(-11, 5) //returns 4
MOD(-12, 5) //returns 3
MOD(10, -5) //returns 0
MOD(11, -5) //returns -4
MOD(12, -5) //returns -3
```

The following example uses MOD() to check if numbers in the Grade field are odd or even. When the divisor is 2, MOD() returns 0 for even numbers, and 1 for odd numbers.

```
MOD([Grade], 2)
```

The following example uses MOD() and YEAR() to get the last digit of a year. YEAR() returns the year number of a date. Dividing a number by 10 returns the last digit of the number.

```
MOD(YEAR([BirthDate]), 10)
```

MONTH()

Returns the month for a specified date value.

Syntax MONTH(date)

MONTH(date, option)

Arguments **date**

The date or date expression whose month to get.

option

A number that represents the month format to return. Use one of the following values:

- 1 to get the month as a number from 1 to 12.
- 2 to get the full month name, for example, January. The result is locale-specific.
- 3 to get the abbreviated month name, for example, Jan. The result is locale-specific.

If you omit option, MONTH() returns the month as a number.

Returns The month for a specified date value.

Example The following example returns the month, 1–12, for each value in the ShipDate field:

```
MONTH([ShipDate])
```

The following example returns the full month name for each ShipDate value:

```
MONTH([ShipDate], 2)
```

NOT()

Negates a Boolean expression.

- Syntax** NOT(x)
- Argument** **x**
The Boolean value or expression to negate.
- Returns** True if the expression evaluates to false, and false if the expression evaluates to true.
- Example** The following example uses NOT() in conjunction with the IF() function. It tests if the value in the State field is not CA. If the value is not CA, it returns the value in the Markup field multiplied by 10%, and by 15% if it is.
- ```
IF (NOT ([State]="CA"), [Markup] *10%, [Markup] *15%)
```
- The previous IF( ) expression is semantically equivalent to the following expression:
- ```
IF ([State]="CA", [Markup] *15%, [Markup] *10%)
```

NOTNULL()

Tests if a value in a specified field is a non-null value.

- Syntax** NOTNULL(source)
- Argument** **source**
The field in which to check for non-null values.
- Returns** True if a value in the specified field is not a null value; returns false otherwise.
- Example** The following example uses NOTNULL() in conjunction with the IF() function to test for non-null values in the BirthDate field. If there is a non-null value, display the BirthDate value; otherwise display No date specified.
- ```
IF (NOTNULL([BirthDate]), [BirthDate], "No date specified")
```

---

## NOW( )

Returns the current date and time.

- Syntax** NOW( )

## QUARTER( )

**Returns** The current date and time. For example:

Feb 10, 2010 2:55 PM

**Example** The following example uses the DIFF\_DAY( ) and NOW( ) functions to calculate the number of days from the current date and time to Christmas:

```
DIFF_DAY(NOW(), "12/25/10")
```

---

## QUARTER( )

Returns the quarter number for a specified date value.

**Syntax** QUARTER(date)

**Arguments** **date**

The date or date expression whose quarter number to get.

**Returns** A number from 1 to 4 that represents the quarter for a specified date value. Quarter 1 starts in January.

**Examples** The following example displays the quarter number for each value in the CloseDate field:

```
QUARTER([CloseDate])
```

The following example displays a string—Q1, Q2, Q3, or Q4—for each value in the CloseDate field:

```
"Q" & QUARTER([CloseDate])
```

---

## RIGHT( )

Extracts a substring from a string, starting from the right-most, or last, character.

**Syntax** RIGHT(source)

RIGHT(source, n)

**Arguments** **source**

The string from which to extract a substring.

**n**

The number of characters to extract, starting from the last character.

**Returns** A substring of a specific length.

- If you omit n, the number of characters to extract, the function returns the last character only.
- If n is zero, the function returns an empty string.

- If n is greater than the length of the string, the function returns the entire string.

**Example** The following example displays the last four characters of each value in the ProductCode field:

```
RIGHT([ProductCode], 4)
```

The following example uses RIGHT( ) in conjunction with the LEN( ) and FIND( ) functions to display the characters that appear after the hyphen in a product code. This example assumes that the number of characters after the hyphen varies. Therefore, the length of the entire string (returned by LEN( )) minus the length up to the hyphen (returned by FIND( )) is the number of characters to display.

```
RIGHT([ProductCode], LEN([ProductCode]) - FIND("-", [ProductCode]))
```

If the product code is ModelA-Ford, the expression returns Ford. If the product code is ModelCZ15-Toyota, the expression returns Toyota.

---

## ROUND( )

Rounds a number to a specified number of digits.

**Syntax** ROUND(number)

ROUND(number, dec)

**Arguments** **number**

The number to round.

**dec**

The number of digits to round number to. If you omit dec, ROUND( ) assumes 0.

**Returns** A number rounded to a specified number of digits.

**Example** The following example rounds the numbers in the PriceEstimate field to return an integer. For example, if the PriceEstimate value is 1545.50, ROUND( ) returns 1546. If the PriceEstimate value is 1545.25, ROUND( ) returns 1545.

```
ROUND([PriceEstimate])
```

The following example rounds the numbers in the PriceEstimate field to one decimal place. For example, if the PriceEstimate value is 1545.56, ROUND( ) returns 1545.6. If the PriceEstimate value is 1545.23, ROUND( ) returns 1545.2.

```
ROUND([PriceEstimate], 1)
```

The following example rounds the numbers in the PriceEstimate field to one digit to the left of the decimal point. For example, if the PriceEstimate value is 1545.56,

## ROUNDDOWN( )

ROUND( ) returns 1550. If the PriceEstimate value is 1338.50, ROUND( ) returns 1340.

```
ROUND([PriceEstimate], -1)
```

---

## ROUNDDOWN( )

Rounds a number down to a specified number of digits.

**Syntax**    ROUNDDOWN(number)

             ROUNDDOWN(number, dec)

**Arguments**    **number**

The number to round down.

**dec**

The number of digits to round number down to. If you omit dec, ROUND( ) assumes 0.

**Returns**    A number rounded down to a specified number of digits.

**Example**    The following example rounds down the numbers in the PriceEstimate field to return an integer. For example, if the PriceEstimate value is 1545.25, ROUNDDOWN( ) returns 1545. If the PriceEstimate value is 1545.90, ROUNDDOWN( ) returns 1545.

```
ROUNDDOWN([PriceEstimate])
```

The following example rounds down the numbers in the PriceEstimate field to one decimal place. For example, if the PriceEstimate value is 1545.56, ROUNDDOWN( ) returns 1545.5. If the PriceEstimate value is 1545.23, ROUNDDOWN( ) returns 1545.2.

```
ROUNDDOWN([PriceEstimate], 1)
```

The following example rounds the numbers in the PriceEstimate field down to one digit to the left of the decimal point. For example, if the PriceEstimate value is 1545.56, ROUNDDOWN( ) returns 1540. If the PriceEstimate value is 1338.50, ROUNDDOWN( ) returns 1330.

```
ROUNDDOWN([PriceEstimate], -1)
```

---

## ROUNDUP( )

Rounds a number up to a specified number of digits.

**Syntax**    ROUNDUP(number)

             ROUNDUP(number, dec)



|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Arguments</b> | <p><b>number</b><br/>The number to round up.</p> <p><b>dec</b><br/>The number of digits to round number up to. If you omit dec, ROUND( ) assumes 0.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Returns</b>   | A number rounded up to a specified number of digits.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Example</b>   | <p>The following example rounds up the numbers in the PriceEstimate field to return an integer. For example, if the PriceEstimate value is 1545.25, ROUNDUP( ) returns 1546. If the PriceEstimate value is 1545.90, ROUNDUP( ) returns 1546.</p> <pre>ROUNDUP ([PriceEstimate])</pre> <p>The following example rounds up the numbers in the PriceEstimate field to one decimal place. For example, if the PriceEstimate value is 1545.56, ROUNDUP( ) returns 1545.6. If the PriceEstimate value is 1545.23, ROUNDUP( ) returns 1545.3.</p> <pre>ROUNDUP ([PriceEstimate], 1)</pre> <p>The following example rounds up the numbers in the PriceEstimate field to one digit to the left of the decimal point. For example, if the PriceEstimate value is 1545.56, ROUNDUP( ) returns 1550. If the PriceEstimate value is 1338.50, ROUNDUP( ) returns 1340.</p> <pre>ROUNDUP ([PriceEstimate], -1)</pre> |

---

## SEARCH( )

Finds the location of a substring in a string. The substring can contain wildcard characters.

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Syntax</b>    | SEARCH(pattern, source)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                  | SEARCH(pattern, source, index)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Arguments</b> | <p><b>pattern</b><br/>The string pattern to search for. You must enclose the pattern in double quotation marks (" "). You can use the following special characters in a pattern:</p> <ul style="list-style-type: none"> <li>■ An asterisk ( * ) matches zero or more characters, including spaces. For example, t*n matches tn, tin, and teen.</li> <li>■ A question mark ( ? ) matches exactly one character. For example, t?n matches tan, ten, tin, and ton. It does not match teen or tn.</li> </ul> <p><b>source</b><br/>The string in which to search.</p> |

## SQRT( )

### index

The position in source where the search starts.

**Returns** The numerical position of the string pattern in the string. The first character of a string starts at 1. If the substring is not found, SEARCH( ) returns 0.

**Examples** The following example searches for the string pattern, S\*A, in each product code. If the product name is KBS5412A, SEARCH( ) returns 3.

```
SEARCH("S*A", [ProductCode])
```

The following example uses SEARCH( ) in conjunction with the LEFT( ) function to display the characters that precede the first space character in a product name. The LEFT( ) function extracts a substring of a specified length, starting from the first character. In this example, the length of the substring to display is equal to the numerical position of the space character.

```
LEFT([ProductName], SEARCH(" ", [ProductName]))
```

If the product name is 1969 Ford Falcon, the expression returns 1969.

---

## SQRT( )

Calculates the square root of a number.

**Syntax** SQRT(number)

**Argument** **number**  
The number for which you want to find the square root. The number must be a positive number.

**Returns** A number that is the square root of the specified number.

**Examples** The following example calculates the square root of each numeric value in the LotSize field:

```
SQRT([LotSize])
```

The following example uses SQRT( ) to calculate the actual distance travelled uphill, given the base distance and elevation values. This example applies the Pythagorean theorem, which states that  $a^2 + b^2 = c^2$ . Using this theorem, the actual distance traveled is c, which means we want to calculate

$$c = \sqrt{a^2 + b^2}$$

which translates to the following expression:

```
SQRT((([Distance] * [Distance]) + ([Elevation] * [Elevation])))
```

---

## TODAY( )

Returns the current date that includes a time value of midnight, 12:00 AM.

**Syntax** TODAY( )

**Returns** The current date in the following format:

Feb 11, 2010 12:00 AM

**Examples** The following example calculates the number of days from the current date to Christmas:

`DIFF_DAY(TODAY(), "12/25/10")`

The following example calculates the number of years from each value in the HireDate field to the current date:

`DIFF_YEAR([HireDate], TODAY())`

---

## TRIM( )

Removes the leading and trailing blanks from a specified string. TRIM( ) does not remove blank characters between words.

**Syntax** TRIM(source)

**Argument** **source**  
The string from which to remove leading and trailing blank characters.

**Returns** A string with all leading and trailing blank characters removed.

**Example** The following example uses TRIM( ) to remove all leading and trailing blank characters from values in the FirstName and LastName fields. The expression uses the & operator to concatenate each trimmed FirstName value with a space, then with each trimmed LastName value.

`TRIM([FirstName]) & " " & TRIM([LastName])`

---

## TRIMLEFT( )

Removes the leading blanks from a specified string.

**Syntax** TRIMLEFT(source)

**Argument** **source**  
The string from which to remove the leading blank characters.

**Returns** A string with all leading blank characters removed.

## TRIMRIGHT( )

**Example** The following example concatenates a literal string with each value in the customerName field. TRIMLEFT( ) removes all blank characters preceding the customerName value so that there are no extra blank characters between the literal string and the customerName value.

```
"Customer name: " & TRIMLEFT([customerName])
```

---

## TRIMRIGHT( )

Removes the trailing blanks from a specified string.

**Syntax** TRIMRIGHT(source)

**Argument** **source**  
The string from which to remove the trailing blank characters.

**Returns** A string with all trailing blank characters removed.

**Example** The following example concatenates each value in the Comment field with a semicolon, then with a value in the Action field. TRIMRIGHT( ) removes all blank characters after the Comment value so that there are no extra blank characters between the Comment string and the semicolon.

```
TRIMRIGHT([Comment]) & "; " & [Action]
```

---

## UPPER( )

Converts all letters in a string to uppercase.

**Syntax** UPPER(source)

**Argument** **source**  
The string to convert to uppercase.

**Returns** The specified string in all uppercase letters.

**Example** The following example displays all the string values in the customerName field in all uppercase:

```
UPPER([customerName])
```

---

## WEEK( )

Returns a number from 1 to 52 that represents the week of the year.

**Syntax** WEEK(date)

**Argument** **date**  
The date or date expression whose week of the year to get.

- Returns** A number that represents the week of the year for the specified date value.
- Example** The following example gets the week number of the year for each date value in the ShipDate field:

```
WEEK ([ShipDate])
```

---

## WEEKDAY( )

Returns the day of the week for a specified date value.

**Syntax** WEEKDAY(date, option)

**Arguments** **date**  
The date or date expression from which you want to get the day of the week.

**option**  
A number that represents the weekday format to return. Use one of the following values:

- 1 to get the day as a number from 1 (Sunday) to 7 (Saturday).
- 2 to get the day as a number from 1 (Monday) to 7 (Sunday).
- 3 to get the day as a number from 0 (Monday) to 6 (Sunday).
- 4 to get the full weekday name, for example, Wednesday. The result is locale-specific.
- 5 to get the abbreviated weekday name, for example Wed. The result is locale-specific.

If you omit option, WEEKDAY( ) assumes option 1.

**Returns** The day of the week for a specified date value.

**Example** The following example gets the full weekday name for each date value in the DateSold field:

```
WEEKDAY ([DateSold] , 4)
```

---

## YEAR( )

Returns the four-digit year value for a specified date value.

**Syntax** YEAR(date)

**date**  
The date or date expression from which you want to extract the year part.

**Returns** The number that represents the four-digit year for the specified date value.

**Example** The following example gets the four-digit year for each date value in the ShipDate field, and adds 15 to the four-digit year. For example, if the ShipDate value is Sep 16, 2008, YEAR( ) returns 2023.

```
(YEAR([ShipDate]) + 15)
```

# Operators

Table 19-1 lists the operators in EasyScript.

**Table 19-1** EasyScript operators

| Operator | Use to                                                      | Example                                                                                  |
|----------|-------------------------------------------------------------|------------------------------------------------------------------------------------------|
| +        | Add two or more numeric values together                     | [OrderAmount] + [SalesTax]                                                               |
| -        | Subtract one numeric value from another                     | [OrderAmount] - [Discount]                                                               |
| *        | Multiply numeric values                                     | [Price] * [Quantity]                                                                     |
| /        | Divide numeric values                                       | [Profit]/12                                                                              |
| ^        | Raise a numeric value to a power                            | [Length]^2                                                                               |
| %        | Specify a percent                                           | [Price] * 80%                                                                            |
| =        | Test if two values are equal                                | IF([ProductName] = "1919 Ford Falcon", "Discontinued Item", [ProductName])               |
| >        | Test if one value is greater than another value             | IF([Total] > 5000, [Total]*15%, [Total]*10%)                                             |
| <        | Test if one value is less than another value                | IF([SalePrice] < [MSRP], "Below MSRP", "Above MSRP")                                     |
| >=       | Test if one value is greater than or equal to another value | IF([Total] >= 5000, [Total]*15%, [Total]*10%)                                            |
| <=       | Test if one value is less than or equal to another value    | IF([SalePrice] <= [MSRP], "Below or equal to MSRP", "Above MSRP")                        |
| <>       | Test if two values are not equal                            | IF([Country] <> "USA", "Imported product", "Domestic product")                           |
| AND      | Test if two or more conditions are true                     | IF(([Gender] = "Male" AND [Salary] >= 150000 AND [Age] < 50), "Match found", "No match") |
| OR       | Test if any one of multiple conditions is true              | IF(([City] = "Boston") OR ([City] = "San Francisco"), "U.S.", "Europe and Asia")         |
| &        | Concatenate string values                                   | [FirstName] & " " & [LastName]                                                           |

# 20

## **Specifying filter conditions at report run time**

This chapter contains the following topics:

- About report parameters and filters
- Enabling the user to specify a filter condition
- Getting information about queries

---

## About report parameters and filters

Report parameters provide a mechanism for collecting values from a report user or a program. They are typically used in filters to collect information that determines the data to display in a report. Actuate BIRT Designer supports all the functionality of parameters and filters available in the open-source version, and provides additional features.

In open-source BIRT Report Designer, the following expression in the filter tool is an example of how a filter uses a report parameter to obtain the filter value at run time:

```
row["Total"] Greater than or Equal params[Sales Total].value
```

The field to evaluate (row["Total"]) and the operator that determines the type of filter test (Greater than or Equal) are specified at design time. At run time, the report user supplies the parameter value, which, in this example, is a sales total, such as 10000.

In Actuate BIRT Designer, report parameters and filters are enhanced to support dynamic filter conditions, which provide users more control over what data they see in the report. Instead of specifying only the value on which to filter, the report user can specify conditions, such as Total Less than 10000, or Total Between 10000 and 20000, or Total Greater than 20000. The user can also choose to view all totals; in other words, the user can choose to omit the filter condition.

Another enhancement is that these filters can modify the underlying query so that filtering occurs in the database. This functionality applies when accessing a database through an information object or a JDBC connection for query builder data source. When using these data source types, only data rows that meet the filter criteria are retrieved from the database. By retrieving a limited number of rows, Actuate BIRT Designer's performance improves.

This chapter describes how to create report parameters and filters to enable dynamic filtering. For information about other types of parameters and filters, see *BIRT: A Field Guide*.

---

## Enabling the user to specify a filter condition

To enable users to specify a filter condition, complete the following tasks in the recommended order:

- Create a dynamic filter report parameter.
- Create a dynamic filter and bind it to the report parameter.



## Creating a dynamic filter report parameter

A dynamic filter report parameter differs from a regular report parameter in one important aspect. Using a dynamic filter parameter, you can provide report users with a list of operators, which they can use to construct their own filter condition.

Figure 20-1 shows an example definition of a dynamic filter parameter where the display type is a text box. Aside from the Dynamic Filter Condition section, where you specify the column on which to filter and the operators to provide to users, the properties are similar to the properties for a regular report parameter.

**Edit Dynamic Filter Parameter**

Name:

Prompt text:

Data type:

Display type:

Dynamic Filter Condition

Column:

Operator:

Default value:

1000

Buttons: Add, Edit..., Remove, Remove All

Buttons: OK, Cancel

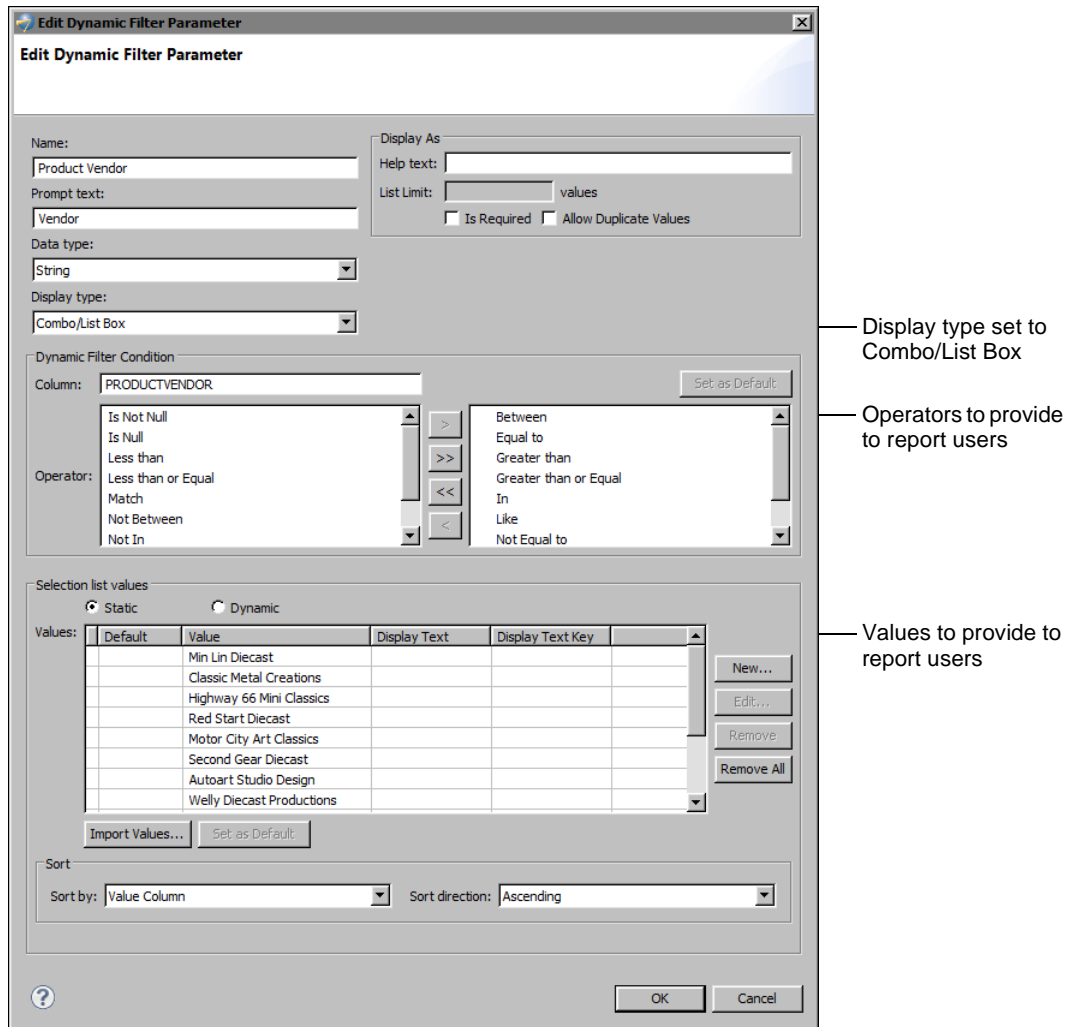
Standard properties for a report parameter

Column on which to filter

Operators to provide to report users

**Figure 20-1** Properties of a dynamic filter parameter whose display type is a text box

Like the regular report parameter, a dynamic filter parameter can also provide the user with a list of values. However, values can be presented in a combo box or list box only. Figure 20-2 shows an example definition of a dynamic filter parameter that includes a list of values. The display type is set to Combo/List Box.



**Figure 20-2** Properties of a dynamic filter parameter whose display type is a combo box or list box

### How to create a dynamic filter report parameter

- 1 In Data Explorer, right-click Report Parameters, and choose New Dynamic Filter Parameter.
- 2 Specify the properties of the dynamic filter parameter. For information about the standard properties for a report parameter, see *BIRT: A Field Guide*. The following Dynamic Filter Condition properties are specific to a dynamic filter parameter:

- In Column, type the name of the field on which to filter.
- In Operator, select the operators to provide to the user. By default, all the operators are selected. To remove an operator, select it and click <.
- Optionally, set one of the operators as the default. Select the operator, then choose Set as Default. A check mark appears next to the operator. If you specify a default operator, you must also specify a value in Default Value.

**3** Choose OK.

## **Making a filter parameter optional**

When you create a dynamic filter parameter, you can require the user to specify a value or you can make the filter optional. It is usually good practice to make the filter optional, so that the user can view a report with all the data. For example, if a report displays inventory data by vendor and you create an optional parameter to filter on vendors, the user can select No Condition to view inventory data for all vendors.

On the other hand, you can require that the user specify a value if displaying all the data results in a very long report. A report that runs into hundreds of pages is not only difficult to read, but the report takes longer to generate.

To make a filter parameter optional, deselect the Is Required property.

## **Accepting multiple values**

Users often want to select any number of values for a filter condition. In an inventory report, for example, the user might need to view data for several vendors. To support the selection of multiple values, create a dynamic filter parameter as follows:

- Select Combo/List Box as the display type.
- Select the In operator as one of the operators to provide to the user.
- Create a list of values.

## **Creating a dynamic filter**

Actuate BIRT Designer supports two types of filters: static and dynamic. Use a static filter to define a specific filter condition at design time. Use a dynamic filter to enable users to define a filter condition at report run time.

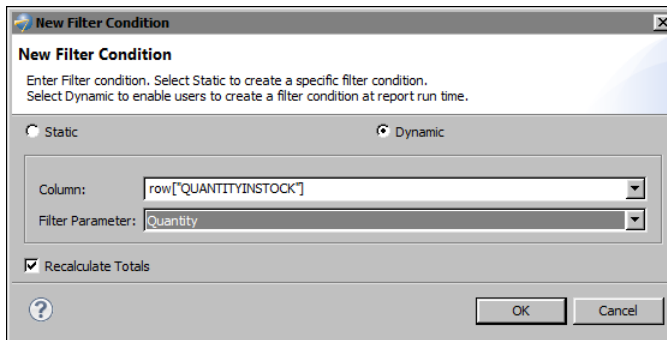
### **How to create a dynamic filter**

This procedure assumes you have already created the dynamic filter report parameter to bind to the filter you are creating.

- 1** Select the element to which to apply a dynamic filter condition. For example, select a data set, a table, or a chart whose data you want to filter.

- 2 Choose Filters, then choose New or Add to define a filter.
- 3 In New Filter Condition, specify the following values:
  - 1 Choose Dynamic.
  - 2 In Column, select the field on which to filter.
  - 3 In Filter Parameter, select the dynamic filter parameter to update this filter with user-specified values at run time.

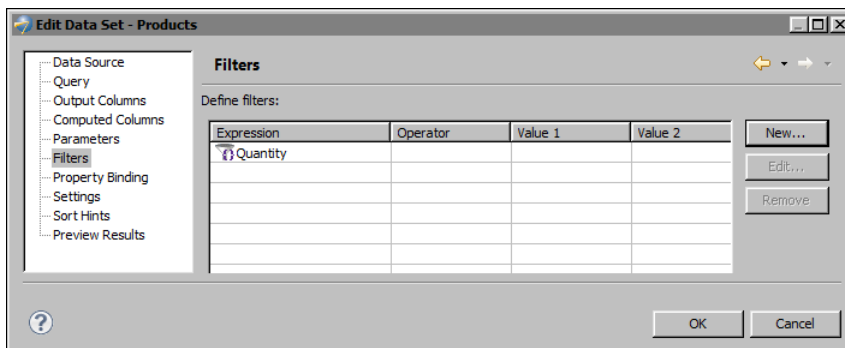
Figure 20-3 shows an example in which a QUANTITYINSTOCK field is bound to a dynamic filter parameter named Quantity.



**Figure 20-3** Definition of a dynamic filter condition

- 4 Choose OK.

The filter appears on the Filters page. Figure 20-4 shows the Quantity dynamic filter on the Filter page of the data set editor. Unlike a static filter, no values appear under Operator, Value 1, or Value 2, indicating that these values are specified at run time.



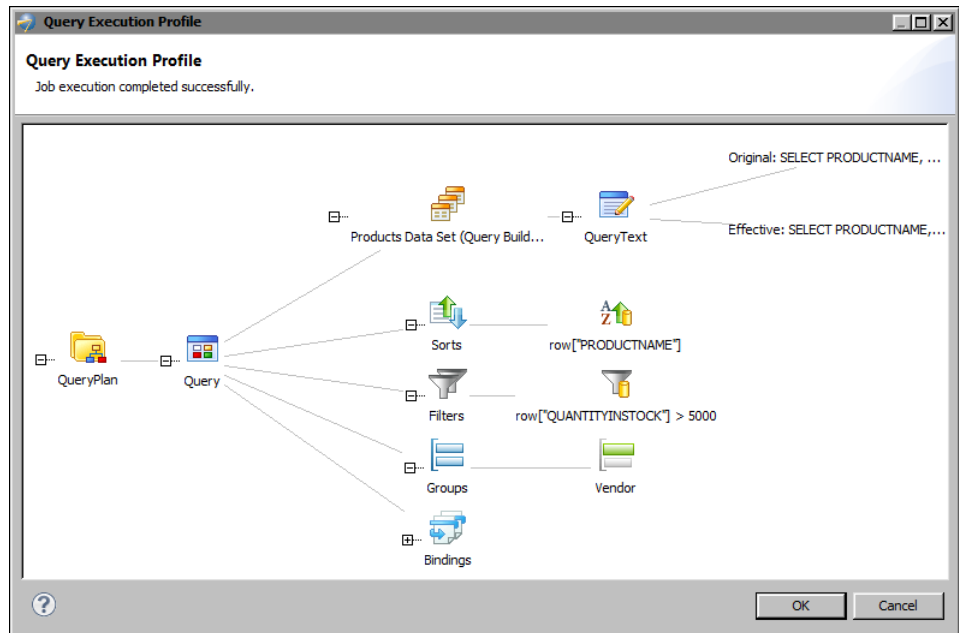
**Figure 20-4** Dynamic filter in a data set

## Getting information about queries

When a report accesses data from a database, it is useful to understand what queries the report sends to the database, and how charts and tables get their data. For example, if you create a dynamic filter on a table to display sales data for certain products only, does BIRT send a query to retrieve sales data for all products then filter at the table level to display data for specific products, or does BIRT send a query that retrieves only data for specific products? Answers to questions such as this can help you optimize the performance of a report.

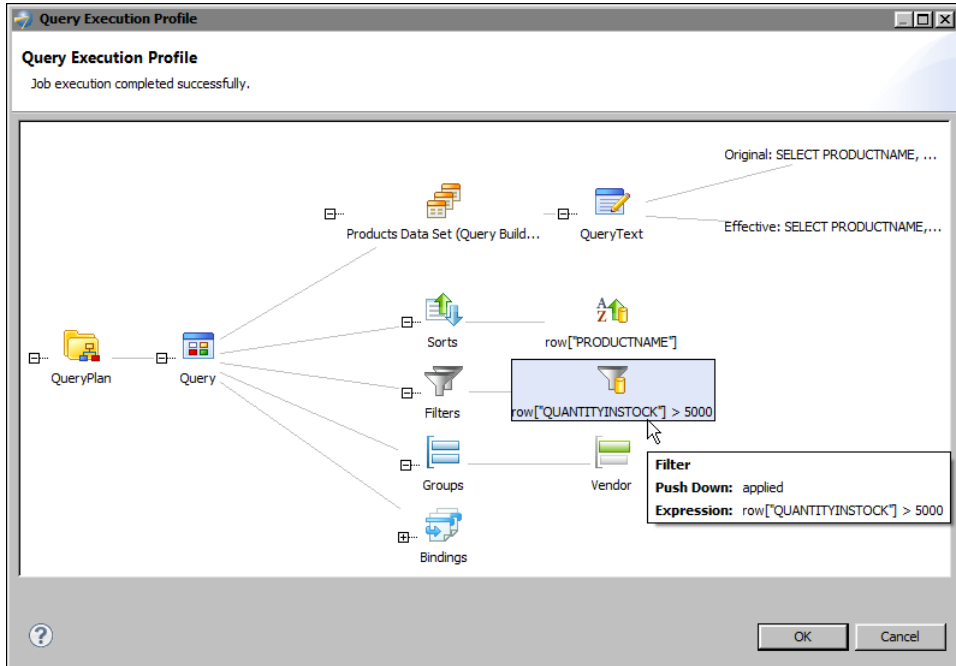
To get information about the queries that are executed, right-click a report element, such as a table or a chart, then choose Show Query Execution Profile. Figure 20-5 shows an example of a query that is executed for a table. In this example, Query Execution Profile shows the following information:

- The data set (Products Data Set) that is bound to the table, the original query specified, and the query modified by BIRT and sent to the database
- A sort definition that sorts data rows by product name in ascending order
- A filter condition (row["QUANTITYINSTOCK"] > 5000)
- A group definition that groups data by vendor
- Data bindings associated with the table



**Figure 20-5** Query execution profile for a table

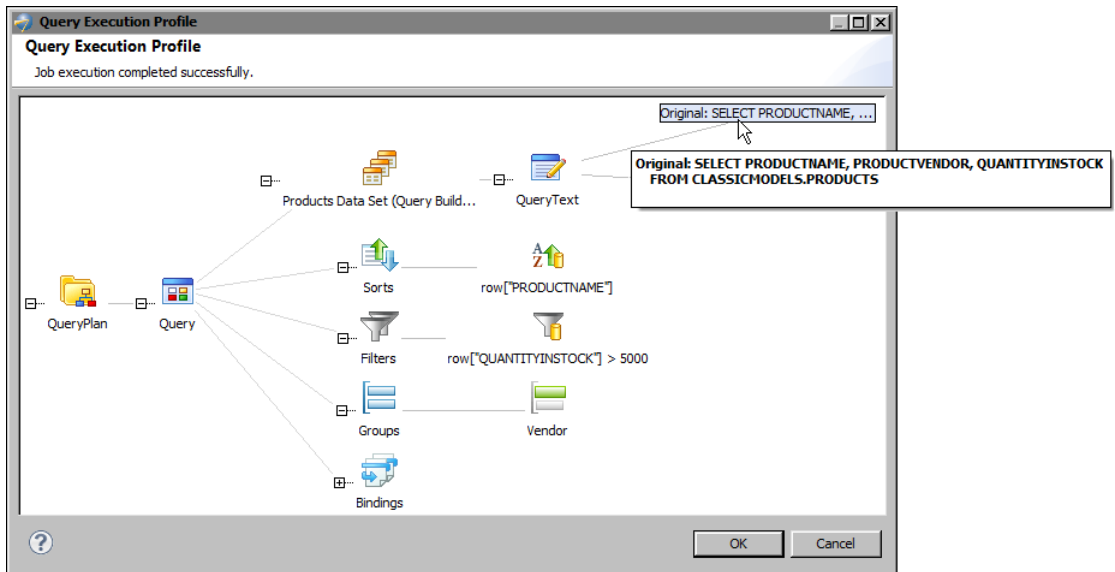
Select each item in the query execution profile to see more information about that item. For example, click the filter, as shown in Figure 20-6, to see whether the filter is executed in BIRT or at the database level. In the filter information, “Push Down: applied” means that the filter is pushed down to, or executed by, the database. Similarly, select the sort and group definitions to see where these tasks are executed.



**Figure 20-6** Filter information displayed in the query execution profile

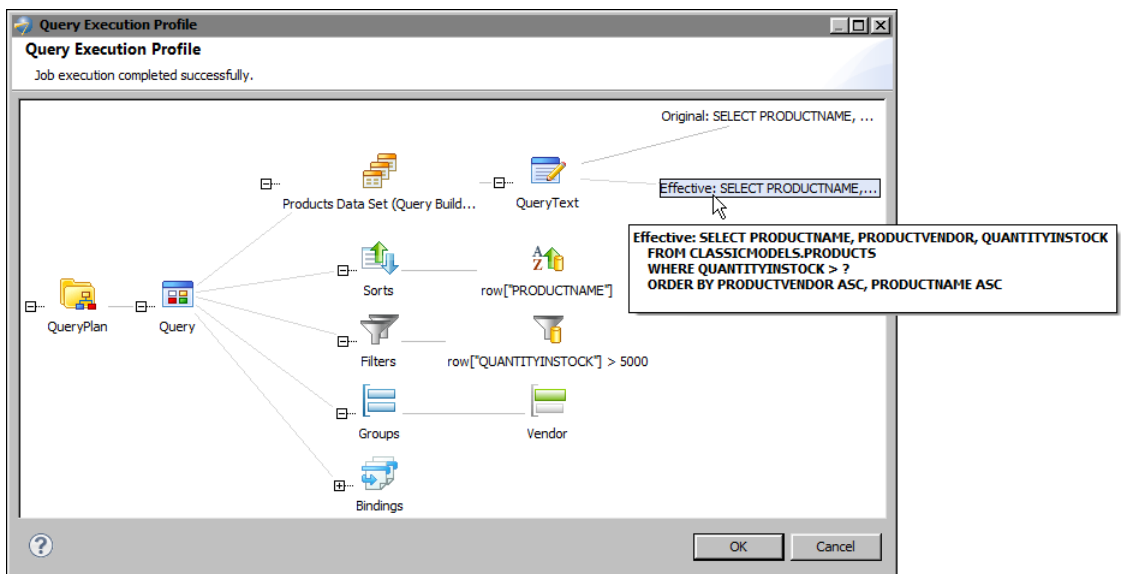
Another piece of useful information that the query execution profile provides is whether, and how, BIRT modifies a query when you sort, group, or filter data using the graphical tools. As discussed at the beginning of this chapter, BIRT can modify a query to perform these tasks at the database level if the report accesses the database through an information object or a JDBC connection for query builder data source.

Select the Original: SELECT statement to see the query specified originally. Select the Effective: SELECT statement to see the query modified by BIRT. Figure 20-7 shows an example of the SELECT statement in the original query. Figure 20-8 shows an example of the SELECT statement in the modified query.



**Figure 20-7** Original query displayed in the query execution profile

As Figure 20-8 shows, BIRT changes the original query to add a filter condition (WHERE clause) and a sort condition (ORDER BY clause).



**Figure 20-8** Modified (effective) query displayed in the query execution profile

The performance of a report improves when data is processed by the database rather than by BIRT. Data filtering in particular can affect performance significantly because filtering can mean the difference between retrieving hundreds or millions of rows of data.

When you create filters using the graphical filter tool, BIRT pushes a filter to the database if the filter condition can be mapped to a SQL expression (if using the JDBC connection for query builder data source) or an Actuate SQL expression (if using an information object data source). Using that criterion, the following are examples of when BIRT pushes a filter to the database:

- The filter uses an operator that is supported by the database, for example, `<`, `>`, `=`.

BIRT-specific operators, such as Match, Top Percent, and Bottom Percent, do not have SQL equivalents, so a filter that uses any of these operators is not pushed to the database.

- The filter uses an expression that refers to a field in a database table. For example, the following filter condition is pushed to the database if SalesTotal is a column in the database table:

```
row["SalesTotal"] Greater than 5000000
```

On the other hand, the following filter condition is not pushed to the database if Profit is a computed column derived from other columns, for example, `row["Sales"] - row["Cost"]`:

```
row["Profit"] Greater than 2000000
```



# Displaying cross tab data by relative time periods

This chapter contains the following topics:

- About relative time periods
- Aggregating data by a relative time period

## About relative time periods

Cross tabs typically aggregate and display data by time periods because time is an essential part of data analysis. Any analysis of stock performance, revenue, or productivity is meaningful only if it can be measured by day, week, month, quarter, or year. Support for displaying data by a specific time period has been available since the introduction of cross tabs in open-source BIRT Report Designer. For example, a cross tab can display revenue data for a particular month, quarter, or year.

In Actuate BIRT Designer, cross tabs are enhanced to support relative time periods, such as current month, previous month, year-to-date, quarter-to-date, quarter-to-date in the previous year, trailing 30 days, and so on. Displaying data by relative time periods supports, for example, the comparison of current data with past data of the same period. Figure 21-1 shows a report that displays sales data in four cross tabs. All the cross tabs use data from the same cube.

- The first cross tab displays sales by region and by quarter.
- The second cross tab displays total sales, sales in the current year (2011), and sales in the previous year (2010).
- The third cross tab displays the quarter-to-date sales in the current year and, as comparison, sales for the same period in the previous year, and sales in the previous quarter.
- The fourth cross tab compares sales in the previous 15 days with the same period the previous year.

Report generated on December 01, 2011

|               | 2010 |      |      |       | 2011  |       |       |       | Grand Total |
|---------------|------|------|------|-------|-------|-------|-------|-------|-------------|
|               | Q1   | Q2   | Q3   | Q4    | Q1    | Q2    | Q3    | Q4    |             |
| Europe        | 6000 | 6000 | 8000 | 14000 | 12000 | 14000 | 16000 | 24000 | 100000      |
| North America | 4000 | 5000 | 7000 | 12000 | 11000 | 13000 | 15000 | 22000 | 89000       |

|               | Total Sales | Current Year | Previous Year |
|---------------|-------------|--------------|---------------|
| Europe        | 100000      | 66000        | 34000         |
| North America | 89000       | 61000        | 28000         |

|               | Quarter-to-date | Same Quarter, Previous Year | Previous Quarter |
|---------------|-----------------|-----------------------------|------------------|
| Europe        | 24000           | 14000                       | 16000            |
| North America | 22000           | 12000                       | 15000            |

|               | Trailing 15 days | Trailing 15 days, previous year |
|---------------|------------------|---------------------------------|
| Europe        | 18000            | 4000                            |
| North America | 17000            | 3000                            |

Figure 21-1 Report displaying four cross tabs

The first cross tab represents the typical way of displaying a measure (sales) by two dimensions (a region dimension and a time dimension) defined in a cube. The other cross tabs aggregate data by region and by relative time periods. The procedures for aggregating the sales data by the relative time periods shown in the examples are described later in this chapter. For information about building cubes and cross tabs, see *BIRT: A Field Guide*.

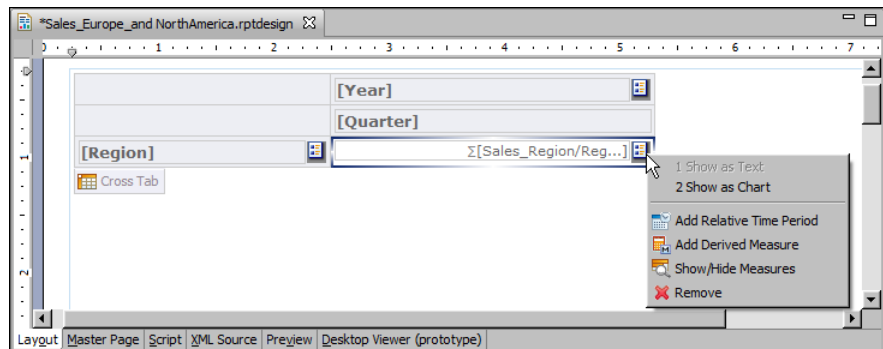
## Aggregating data by a relative time period

As the cross tab examples in Figure 21-1 show, the capability to aggregate data by relative time periods is useful for comparing data across different time periods. In addition to viewing data by the typical time periods, such as quarter-to-date or previous quarter, you can define time periods, for example, to compare the week before Christmas with the week after Christmas, or the last 15 days in a quarter with the same period last year.

BIRT provides this functionality at the cross tab level where you add a relative time period element and select the time period (Year To Date, Previous Year To Date, and so on) for which to view data. In many cases, you do not need to make any changes to the cube, assuming that the cube already contains at least one time dimension, which is typical. A cube that provides sales data, for example, typically defines time dimensions, such as orderDate or shipDate.

### How to aggregate data by a relative time period

- 1 In the detail area of a cross tab, insert a relative time period element. To do so, click the button next to a measure, as shown in Figure 21-2, and choose Add Relative Time Period.



**Figure 21-2** Inserting a relative time period measure

- 2 In Relative Time Period Aggregation Builder, specify the properties of the relative time period measure. All properties are required unless described as optional.

- In Column Binding Name, type a name for the measure data element.
- In Display Name (optional), type an alternate name to display in the report design. If one is not specified, the report design displays the Column Binding Name value.
- In Data Type, select a data type appropriate for the measure. The default type, Float, provides the best performance and a high precision level.
- In Time Period, select the desired time period in which to aggregate the data. For example, to calculate sales totals for the current month, select Current Month. The time periods are described in Table 21-1 later in this chapter. Some time periods, such as Previous N Months, require additional property values, which appear immediately below Time Period.
- In Function, select the function to perform the desired aggregate calculation. The default function, SUM, adds up all the measure values. For information about each aggregate function, see *BIRT: A Field Guide*.
- In Expression, select the measure whose values to aggregate, or specify an expression. The drop-down list displays the measures used in the cross tab.
- In Filter Condition (optional), specify an expression to include only certain measure values from the aggregate calculation. For example, specify a filter, such as `measure["SalesAmount"] > 100`, to include only sales amounts over 100 in the calculation.
- In Aggregate On, select the dimension or dimensions by which to aggregate the measure data. The dimensions used in the cross tab are selected by default.
- In Time Dimension, select the time dimension that contains the date values to use in the relative time period calculation. The drop-down list displays all the time dimensions defined in the cube. The time dimension inserted in the cross tab, if any, is selected by default. If you did not insert a time dimension in the cross tab, the first time dimension defined in the cube is selected by default. In the example report shown in Figure 21-1, the first cross tab displays a time dimension (dates are grouped by year and quarter), but the other cross tabs do not.
- In Reference Date, specify the date that is the basis for calculating the specific period for aggregating data. Select one of the following options:
  - Today. This option uses the current date (the date on which the report is run) as the reference date. For example, if the relative time period specified in Time Period is Year to Date, and the report is run on 12/01/2011, BIRT aggregates the data for the year up to, and including, 12/01/2011.
  - This date. This option uses a fixed date value, which you specify, as the reference date. If the time period is Year to Date, and you specify 09/30/2011, BIRT aggregates the data for the year up to, and including,

09/30/2011. You can use the Calendar tool in the expression builder to select a date, or type a date value in one of the following formats:

"09/30/2011"

"2011-09-30"

Enclose the date in quotes if specifying a JavaScript or EasyScript expression.

- ❑ Most recent date in Time Dimension. This option uses the latest date in the dimension specified in the Time Dimension property as the reference date. For example, if the time dimension contains the dates 07/07/2011, 11/30/2011, and 09/19/2011, the date 11/30/2011 is used as the reference date. This option is available only if the cross tab contains a time dimension.

## Examples of relative time period aggregations

Figure 21-1 showed examples of cross tab data aggregated by relative time periods. In all the examples, the current date is December 01, 2011. This section describes how those aggregations are defined.

### Example 1: Displaying data for the current year

Figure 21-3 shows using Current Year to calculate the sum of the Sales measure by region for the current year up to the current date. The dates used in the calculation are from the TransactionDate dimension. These settings result in the current year data displayed in the second cross tab shown in Figure 21-1.

Relative Time Period Aggregation Builder

Column Binding Name: YTD

Display Name ID:

Display Name:

Data Type: Float

Time Period: Current Year

Function: SUM

Expression: measure["Sales"]

Filter Condition:

Aggregate On: Region/Region

Time Dimension: TransactionDate

Reference Date: ☒ Today ☐ This date:

Please enclose the provided date value in quotes.  
For example: "2012-01-23", "1/23/2012".

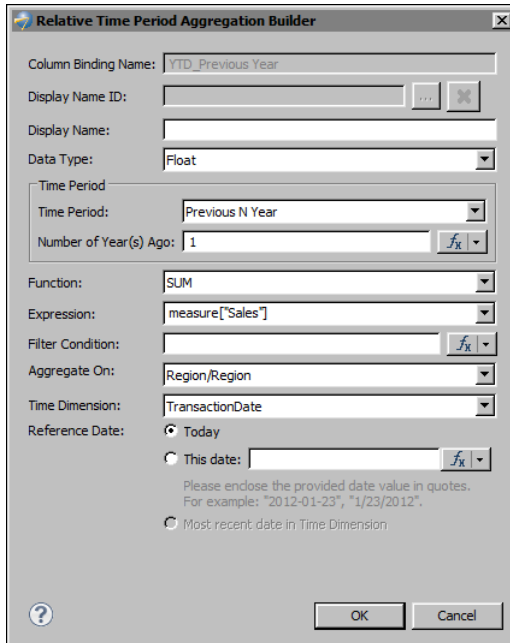
☐ Most recent date in Time Dimension

OK Cancel

**Figure 21-3** Properties set to display Sales data for the current year

## Example 2: Displaying data for the previous year

Figure 21-4 shows using Previous Year to calculate the sum of the Sales measure by region for the previous year. Number of Year(s) Ago is set to 1 to specify that data from one year ago is to be used in the calculation. Reference Date set to Today specifies that the previous one year is calculated from the current date. These settings result in the previous year data displayed in the second cross tab shown in Figure 21-1.



The screenshot shows the 'Relative Time Period Aggregation Builder' dialog box. The 'Column Binding Name' is 'YTD\_Previous Year'. The 'Display Name ID' and 'Display Name' fields are empty. The 'Data Type' is 'Float'. The 'Time Period' is 'Previous N Year'. The 'Number of Year(s) Ago' is '1'. The 'Function' is 'SUM'. The 'Expression' is 'measure[Sales]'. The 'Filter Condition' is empty. The 'Aggregate On' is 'Region/Region'. The 'Time Dimension' is 'TransactionDate'. The 'Reference Date' is 'Today'. There are 'OK' and 'Cancel' buttons at the bottom right.

**Figure 21-4** Properties set to display Sales data for the previous year

## Example 3: Displaying data for the quarter to date

Figure 21-5 shows using Quarter to Date to calculate the sum of the Sales measure by region for the current quarter up to the current date. These settings result in the quarter-to-date data displayed in the third cross tab shown in Figure 21-1.

**Relative Time Period Aggregation Builder**

Column Binding Name: Quarter-to-date

Display Name ID: [ ] [X]

Display Name: [ ]

Data Type: Float

Time Period: Quarter to Date (QTD)

Function: SUM

Expression: measure["Sales"]

Filter Condition: [ ] f<sub>x</sub>

Aggregate On: Region/Region

Time Dimension: TransactionDate

Reference Date: ☒ Today ☐ This date: [ ] f<sub>x</sub>

Please enclose the provided date value in quotes.  
For example: "2012-01-23", "1/23/2012".

☐ Most recent date in Time Dimension

[?] [OK] [Cancel]

**Figure 21-5** Properties set to display Sales data for the quarter to date

#### Example 4: Displaying data for the same quarter in the previous year

Figure 21-6 shows using Quarter to Date Last Year to calculate the sum of the Sales measure by region for the same quarter last year. Number of Year(s) Ago is set to 1 to specify that data for the quarter from one year ago is to be used in the calculation. These settings result in the same quarter, previous year data displayed in the third cross tab shown in Figure 21-1.

**Relative Time Period Aggregation Builder**

Column Binding Name: QTD Previous year

Display Name ID: [ ] [X]

Display Name: [ ]

Data Type: Float

Time Period: Quarter to Date Last Year

Number of Year(s) Ago: 1 f<sub>x</sub>

Function: SUM

Expression: measure["Sales"]

Filter Condition: [ ] f<sub>x</sub>

Aggregate On: Region/Region

Time Dimension: TransactionDate

Reference Date: ☒ Today ☐ This date: [ ] f<sub>x</sub>

Please enclose the provided date value in quotes.  
For example: "2012-01-23", "1/23/2012".

☐ Most recent date in Time Dimension

[?] [OK] [Cancel]

**Figure 21-6** Properties set to display Sales data for the same quarter last year

### Example 5: Displaying data for the previous quarter

Figure 21-7 shows using Previous Quarter to calculate the sum of the Sales measure by region for the previous quarter. Number of Quarter(s) Ago is set to 1 to specify that data from one quarter ago is to be used in the calculation. These settings result in the previous quarter data displayed in the third cross tab shown in Figure 21-1.

The screenshot shows the 'Relative Time Period Aggregation Builder' dialog box. The 'Column Binding Name' is set to 'Previous Quarter'. The 'Display Name ID' and 'Display Name' fields are empty. The 'Data Type' is set to 'Float'. Under the 'Time Period' section, 'Time Period' is set to 'Previous N Quarter' and 'Number of Quarter(s) Ago' is set to '1'. The 'Function' is set to 'SUM', the 'Expression' is 'measure[Sales]', and the 'Filter Condition' is empty. The 'Aggregate On' is set to 'Region/Region' and the 'Time Dimension' is 'TransactionDate'. Under 'Reference Date', 'Today' is selected. There is a help icon at the bottom left and 'OK' and 'Cancel' buttons at the bottom right.

**Figure 21-7** Properties set to display Sales data for the previous quarter

### Example 6: Displaying data for the previous 15 days

Figure 21-8 shows using Trailing N Days to calculate the sum of the Sales measure by region for a specified number of days prior to the current day. Number of Days(s) Ago is set to 15 to specify that data from the previous 15 days is to be used in the calculation. These settings result in the trailing 15 days data displayed in the fourth cross tab shown in Figure 21-1.



**Relative Time Period Aggregation Builder**

Column Binding Name:

Display Name ID:  ...

Display Name:

Data Type:

Time Period

Time Period:

Number of Day(s) Ago:

Function:

Expression:

Filter Condition:

Aggregate On:

Time Dimension:

Reference Date: ☒ Today

☐ This date:

Please enclose the provided date value in quotes.  
For example: "2012-01-23", "1/23/2012".

☐ Most recent date in Time Dimension

**Figure 21-8** Properties set to display Sales data for the previous 15 days

### Example 7: Displaying data for the previous 15 days last year

Figure 21-9 shows using Trailing N Periods to calculate the sum of the Sales measure by region for a specified number of days prior to the current day, but in the previous year. The first Number of Period Ago property is set to 15 and The First Period is set to DAY to specify that data from the previous 15 days is to be used in the calculation. The second Number of Period Ago property is set to 1 and The Second Period is set to YEAR to specify that the calculation is for the previous year. These settings result in the trailing 15 days, previous year data displayed in the fourth cross tab shown in Figure 21-1.

**Figure 21-9** Properties set to display Sales data for the previous 15 days last year

## Supported time periods

Table 21-1 describes the time periods available for the Time Period property. All the time periods are relative to a reference date, which, as described earlier, can be the current date (the date the report is run), a date you specify, or the latest date in the time dimension.

**Table 21-1** Supported time periods

| Time period   | Description                                                                                                                                                               |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Current Month | The entire month relative to the month and year portions of the reference date. For example, if the reference date is 2011-01-10, the period is 2011-01-01 to 2011-01-31. |

**Table 21-1** Supported time periods (continued)

| Time period     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Current Period  | <p>The entire period from a specified period relative to the reference date. For example, use to aggregate data for the same quarter five years ago.</p> <p>This time period requires three additional properties:</p> <ul style="list-style-type: none"> <li>■ The First Period, which specifies either year, quarter, or month as the type of period for which to aggregate data</li> <li>■ Number of Periods Ago, which specifies the number of prior periods (type of period specified next), from which to begin the calculation</li> <li>■ The Second Period, which specifies either year, quarter, month, or day as the type of period</li> </ul> <p>For example, if the reference date is 2012-02-08, to aggregate data for the same quarter five years ago, specify the following:</p> <ul style="list-style-type: none"> <li>■ The First Period: Quarter</li> <li>■ Number of Periods Ago: 5</li> <li>■ The Second Period: Year</li> </ul> <p>Data is aggregated for the entire quarter, 2007-01-01 to 2007-03-31.</p> |
| Current Quarter | <p>The entire quarter relative to the month and year portions of the reference date. For example, if the reference date is 2011-12-15, the period is 2011-10-01 to 2011-12-31.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Current Year    | <p>The entire year relative to the year portion of the reference date. For example, if the reference date is 2011-06-30, the period is 2011-01-01 to 2011-12-31.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Month to Date   | <p>The period starting at the beginning of the reference date's month and ending at the reference date. For example, if the reference date is 2011-12-25, the period is 2011-12-01 to 2011-12-25.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

*(continues)*

**Table 21-1** Supported time periods (continued)

| <b>Time period</b>      | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Month to Date Last Year | Same as Month To Date, but for the previous nth year. This time period requires another property, Number of Years Ago, which specifies which prior year. For example, if the reference date is 2011-12-25 and Number of Years Ago is 1, the period is 2010-12-01 to 2010-12-25.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Next N Periods          | <p>The next n periods from the reference date. This time period requires two additional properties:</p> <ul style="list-style-type: none"> <li>■ Number of Periods Ago, which specifies the number of periods</li> <li>■ The First Period, which specifies either year, quarter, month, week, or day as the period in which to begin the calculation</li> </ul> <p>For example if the reference date is 2012-01-01, Number of Periods Ago is 1, and The First Period is Month, then the period is 2012-01-01 to 2012-01-31.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Period to Date          | <p>The period from a specified period relative to the reference date. For example, use to aggregate data for the same quarter to date, five years ago.</p> <p>This time period requires three additional properties:</p> <ul style="list-style-type: none"> <li>■ The First Period, which specifies either year, quarter, or month as the type of period for which to aggregate data</li> <li>■ Number of Periods Ago, which specifies the number of prior periods (type of period specified next), from which to begin the calculation</li> <li>■ The Second Period, which specifies either year, quarter, month, or day</li> </ul> <p>For example, if the reference date is 2012-02-08, to aggregate data for the same quarter up to 02-08, five years ago, specify the following:</p> <ul style="list-style-type: none"> <li>■ The First Period: Quarter</li> <li>■ Number of Periods Ago: 5</li> <li>■ The Second Period: Year</li> </ul> <p>Data is aggregated for 2007-01-01 to 2007-02-08.</p> |

**Table 21-1** Supported time periods (continued)

| Time period                | Description                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Previous N Month           | The previous nth month relative to the month and year portions of the reference date (the day portion is ignored). This time period requires another property, Number of Months Ago, which specifies which prior month. For example, to specify three months back from the reference month, type 3. If the reference date is 2012-01-15 and Number of Months Ago is 3, then the period is 2011-10-01 to 2011-10-31.       |
| Previous N Month to Date   | The previous nth month relative to the reference date. This time period requires another property, Number of Months Ago, which specifies which prior month. For example, to specify three months back from the reference date, type 3. If the reference date is 2012-01-15 and Number of Months Ago is 3, then the period is 2011-10-01 to 2011-10-15.                                                                    |
| Previous N Quarter         | The previous nth quarter relative to the month and year portions of the reference date (the day portion is ignored). This time period requires another property, Number of Quarters Ago, which specifies which prior quarter. For example, to specify one quarter back from the reference date, type 1. If the reference date is 2012-03-15 and Number of Quarters Ago is 1, then the period is 2011-10-01 to 2011-12-31. |
| Previous N Quarter to Date | The previous nth quarter relative to the reference date. This time period requires another property, Number of Quarters Ago, which specifies which prior quarter. For example, to specify one quarter back from the reference date, type 1. If the reference date is 2012-03-15 and Number of Quarters Ago is 1, then the period is 2011-10-01 to 2011-12-15.                                                             |

*(continues)*

**Table 21-1** Supported time periods (continued)

| <b>Time period</b>        | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                  |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Previous N Year           | The previous nth year relative to the year portion of the reference date. This time period requires another property, Number of Years Ago, which specifies which prior year. For example, to specify two years back from the reference date, type 2. If the reference date is 2011-09-30 and Number of Years Ago is 2, then the period is 2009-01-01 to 2009-12-31. |
| Previous N Year to Date   | The previous nth year relative to the reference date. This time period requires another property, Number of Years Ago, which specifies which prior year. For example, to specify two years back from the reference date, type 2. If the reference date is 2011-09-30 and Number of Years Ago is 2, then the period is 2009-01-01 to 2009-09-30.                     |
| Quarter to Date           | The period starting at the beginning of the reference date's quarter and ending at the reference date. For example, if the reference date is 2011-12-25, the period is 2011-10-01 to 2011-12-25.                                                                                                                                                                    |
| Quarter to Date Last Year | Same as Quarter To Date, but for the previous nth year. This time period requires another property, Number of Years Ago, which specifies which prior year. For example, if the reference date is 2011-12-25 and Number of Years Ago is 1, then the period is 2010-10-01 to 2010-12-25.                                                                              |
| Trailing N Days           | The last n days from the reference date. This time period requires another property, Number of Days Ago, which specifies the number of trailing days. For example, if the reference date is 2011-12-25, and Number of Days Ago is 15, then the period is 2011-12-10 to 2011-12-24.                                                                                  |
| Trailing N Months         | The last n months from the reference date. This time period requires another property, Number of Months Ago, which specifies the number of trailing months. For example, if the reference date is 2011-12-25, and Number of Months Ago is 3, then the period is 2011-09-25 to 2011-12-25.                                                                           |

**Table 21-1**      Supported time periods (continued)

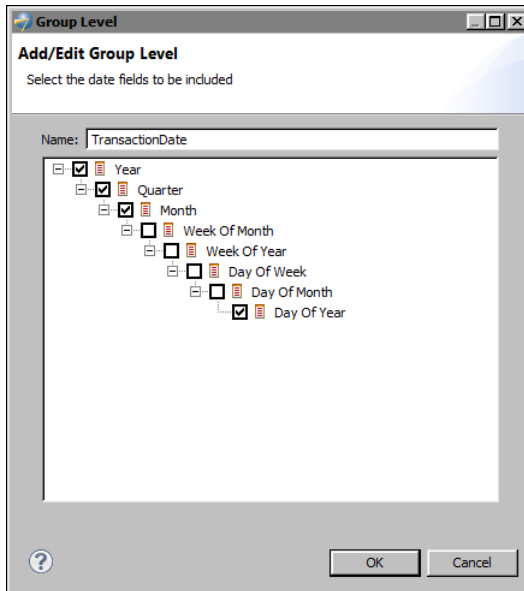
| Time period        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Trailing N Periods | <p>The last n periods from a specified period relative to the reference date. For example, use to aggregate data for the two months prior to the reference date five years ago.</p> <p>This time period requires four additional properties. The first and second properties define the period for which to aggregate data:</p> <ul style="list-style-type: none"><li>■ Number of Periods Ago, which specifies the number of periods</li><li>■ The First Period, which specifies either year, quarter, month, or day as the type of period</li></ul> <p>The third and fourth properties define the period relative to the reference date from which to begin the calculation.</p> <ul style="list-style-type: none"><li>■ Number of Periods Ago, which specifies the number of prior periods</li><li>■ The Second Period, which specifies either year, quarter, month, or day as the type of period</li></ul> <p>For example, if the reference date is 2012-01-01, to aggregate data for the two months prior to January 1, five years ago, specify the following:</p> <ul style="list-style-type: none"><li>■ Number of Periods Ago: 2</li><li>■ The First Period: Month</li><li>■ Number of Periods Ago: 5</li><li>■ The Second Period: Year</li></ul> <p>Data is aggregated for the period 2007-11-01 to 2007-12-31.</p> |
| Year to Date       | <p>The period starting at the beginning of the reference date's year and ending at the reference date. For example, if the reference date is 2011-06-30, the period is 2011-01-01 to 2011-06-30.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

### Using the \* to Date and Trailing N \* time periods

Time periods, such as Month to Date, Quarter to Date, Previous N Year to Date, Trailing N Months, and Trailing N Periods, are calculated using the year, month, and day parts of a reference date. For example, Month to Date covers the period starting at the beginning of the reference date's month and ending at the reference

date. If the reference date is 2012-01-08, the period is 2012-01-01 to 2012-01-08. Contrast this with Current Month, which is calculated using only the year and month parts of a reference date. For a reference date of 2012-01-08, Current Month covers the entire month, 2012-01-01 to 2012-01-31.

Because the \* to Date and Trailing N \* time periods use the day part of a reference date, the time dimension defined in the cube must include the Day Of Year level. Figure 21-10 shows an example in which the time levels, Year, Quarter, Month, and Day Of Year, are selected for a time dimension.



**Figure 21-10** Time levels selected for a time dimension in a cube

If the time dimension in the cube does not include the Day of Year level, and you use a \* to Date or a Trailing N \* time period in a relative time period measure, BIRT displays a warning when you run the report. In the generated report, those measures display the wrong results. Month to Date returns the same results as Current Month, Quarter to Date returns the same results as Current Quarter, and so on. In other words, the day part of the reference date has no effect.



# Adding HTML buttons to a report

This chapter contains the following topics:

- About HTML buttons
- Creating an HTML button
- Writing code for an HTML button
- Changing the appearance of an HTML button

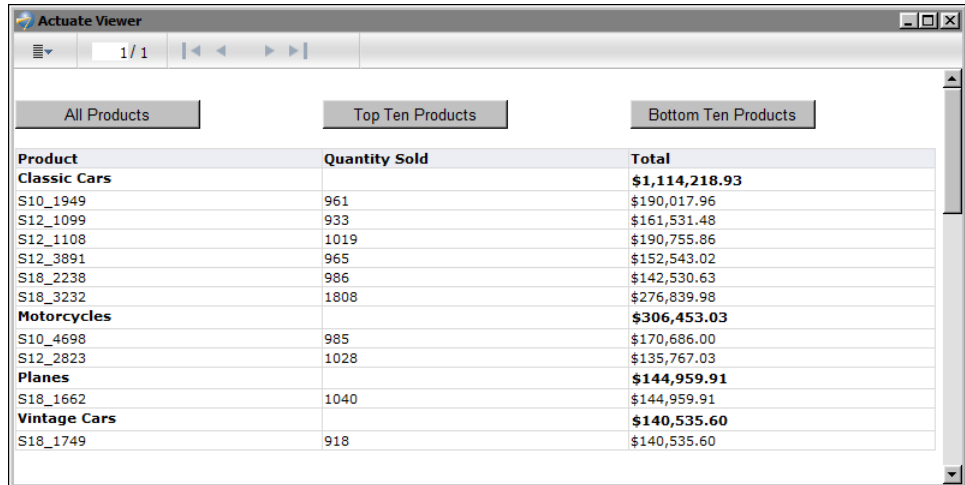
---

## About HTML buttons

In a BIRT report, an HTML button is a report element that provides the same functionality as a button defined with the HTML <button> tag in a web page. The HTML button can execute client-side JavaScript code associated with button events, such as a button click or double-click.

You can use HTML buttons to provide users with custom interactive reporting functionality. For example, you can create HTML buttons that, when clicked, filter data, hide or show data, sort data, link to another report, or perform calculations.

Figure 22-1 shows Actuate Viewer displaying a product sales report that contains three buttons at the top. Each button provides a different data filtering option. The user can choose to view all product sales, the top ten products, or the bottom ten products. The report in Figure 22-1 shows the top ten products. The report in Figure 22-1 shows the top ten products.

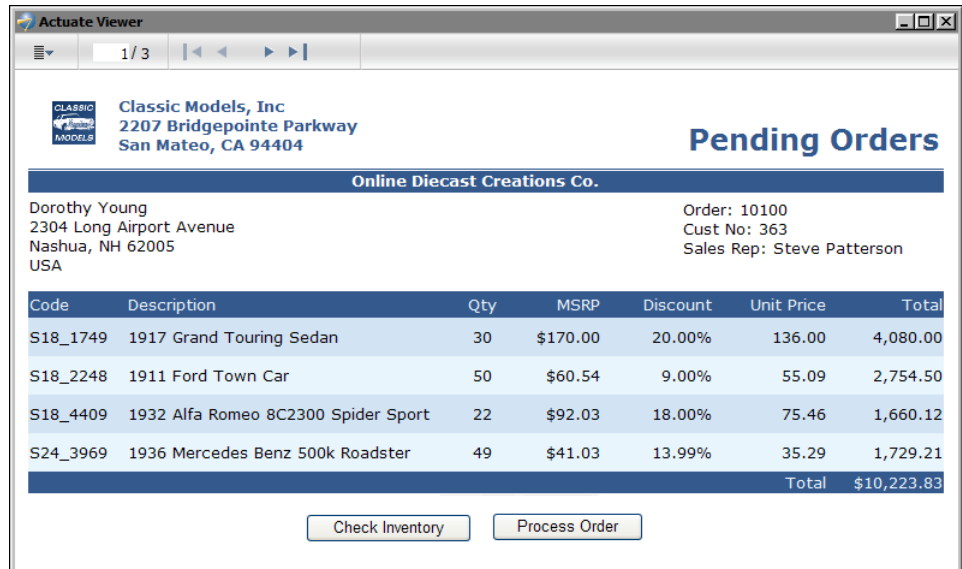


| Actuate Viewer                                    |               |                       |
|---------------------------------------------------|---------------|-----------------------|
| 1 / 1                                             |               |                       |
| All Products Top Ten Products Bottom Ten Products |               |                       |
| Product                                           | Quantity Sold | Total                 |
| <b>Classic Cars</b>                               |               | <b>\$1,114,218.93</b> |
| S10_1949                                          | 961           | \$190,017.96          |
| S12_1099                                          | 933           | \$161,531.48          |
| S12_1108                                          | 1019          | \$190,755.86          |
| S12_3891                                          | 965           | \$152,543.02          |
| S18_2238                                          | 986           | \$142,530.63          |
| S18_3232                                          | 1808          | \$276,839.98          |
| <b>Motorcycles</b>                                |               | <b>\$306,453.03</b>   |
| S10_4698                                          | 985           | \$170,686.00          |
| S12_2823                                          | 1028          | \$135,767.03          |
| <b>Planes</b>                                     |               | <b>\$144,959.91</b>   |
| S18_1662                                          | 1040          | \$144,959.91          |
| <b>Vintage Cars</b>                               |               | <b>\$140,535.60</b>   |
| S18_1749                                          | 918           | \$140,535.60          |

**Figure 22-1** Report with HTML buttons that provide different data filtering options

You can also use HTML buttons to integrate a report with other enterprise applications. Figure 22-2 shows an example of a report that uses Check Inventory and Process Order buttons to link to business processes that run in a different application.

The HTML button is supported in HTML reports only. It does not work in other output formats, such as PDF or Excel, and appears as static text in those documents. If a report is to be viewed in formats other than HTML, use the Visibility property to hide HTML buttons in all output formats, except HTML.



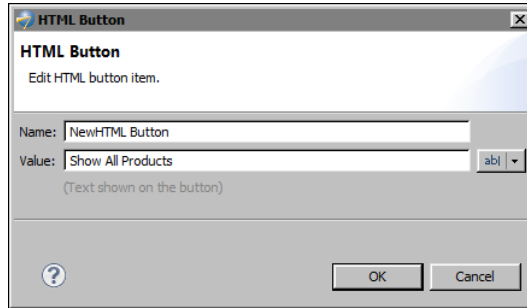
**Figure 22-2** Report with HTML buttons that link to business processes

## Creating an HTML button

Creating a functional HTML button entails inserting the HTML button element in the desired location in the report, specifying the text to display on the button, then programming the button's action. You can place an HTML button in the report page, a grid, table, list, and cross tab.

### How to create an HTML button

- 1 Drag an HTML button element from the palette and drop it in the desired location in the report.
- 2 In HTML Button, specify the following values:
  - 1 In Name, type a different name for the element if you do not want to use the default name. Each HTML button must have a unique name.
  - 2 In Value, type the text to display on the button. Alternatively, select JavaScript Syntax or EasyScript Syntax to create an expression to display a dynamic or calculated value. Figure 22-3 shows an example of text specified for Value.

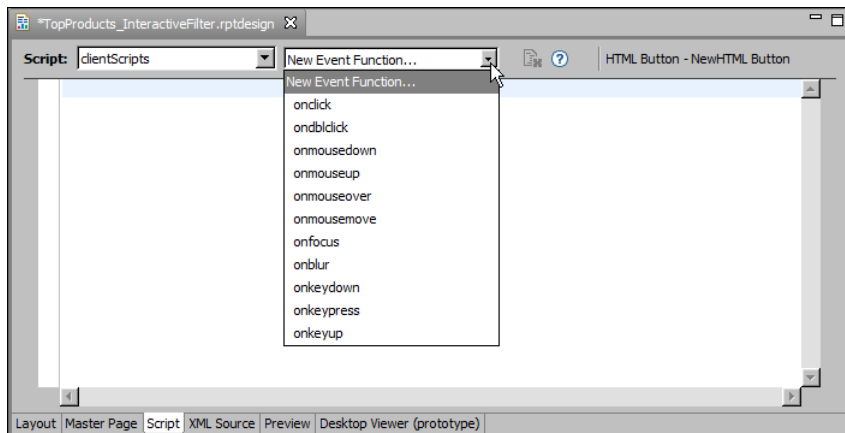


**Figure 22-3** Definition of an HTML button

- 3 Choose OK. A message appears, providing information about writing code for the button. Choose OK.

The HTML button appears in the report.

- 3 While the button is selected, choose the Script tab.
- 4 In the script editor, click New Event Function and select a button event from the drop-down list, shown in Figure 22-4.



**Figure 22-4** Click New Event Function to display the list of button events

- 5 Write JavaScript code to program the button's action for the selected event. The next section provides information about this task.
- 6 Run the report in the web viewer to test the button's functionality. If you do not receive expected results, or if you receive an error, check the event handler script for possible problems.

---

# Writing code for an HTML button

After inserting an HTML button in a report, you use the script editor to write JavaScript code that specifies the task to perform when a particular button event occurs. This type of code is called an event handler. HTML button event handlers can consist of any valid JavaScript code, and typically access report data and the Actuate JavaScript API to provide interactive viewing functionality.

The HTML button supports multiple events, and you can write multiple event handlers for a single button to execute different routines based on the event that occurs. For example, you can write an event handler that displays help information when the user moves the mouse pointer over a button, and a second event handler to run a business process when the user clicks the button.

Table 22-1 lists and describes the events that the HTML button supports and for which you can write code.

**Table 22-1** Supported events

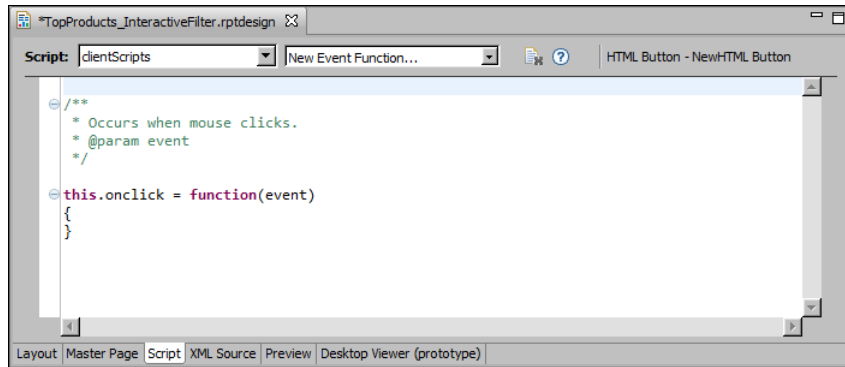
| Event       | Description                                                  |
|-------------|--------------------------------------------------------------|
| onblur      | Occurs when the button loses focus, or stops being active    |
| onclick     | Occurs when the button is clicked                            |
| ondblclick  | Occurs when the button is double-clicked                     |
| onfocus     | Occurs when the button gets focus, or becomes active         |
| onkeydown   | Occurs when a keyboard key is pressed                        |
| onkeypress  | Occurs when a keyboard key is pressed and released           |
| onkeyup     | Occurs when a keyboard key is released                       |
| onmousedown | Occurs when a mouse button is pressed                        |
| onmousemove | Occurs when a mouse pointer moves when it is over the button |
| onmouseover | Occurs when a mouse pointer moves onto the button            |
| onmouseup   | Occurs when a mouse button is released                       |

When you select an event for which to write code, the script editor provides a JavaScript code template, as shown in Figure 22-5.

The following line of code in the template instructs the software to execute the code within the braces that follow when a click, or button press, event occurs:

```
this.onclick = function(event)
```

Do not modify this line of code. Write your JavaScript code within the braces following that line.



**Figure 22-5** Script editor displaying a script template

If you write multiple event handlers for an HTML button, the script editor places all the event handlers serially, as shown in the following code example:

```
/**
 * Occurs when mouse clicks.
 * @param event */

this.onclick = function(event)
{
 /* onclick code here */
}

/**
 * Occurs when a mouse button is released.
 * @param event */

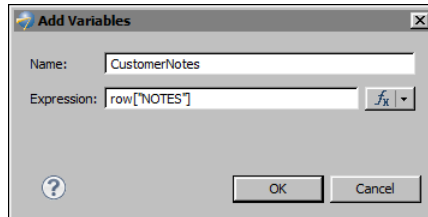
this.onmouseup = function(event)
{
 /* onmouseup code here */
}
```

## Accessing report data

It is common to use HTML buttons to perform calculations on-demand or to present additional information. For example, rather than display customer notes that take up space in a report or that users view infrequently, you can create an HTML button that, when clicked, displays the information when users want to view the information.

These types of event handlers typically require access to data in the report, such as row data, aggregate data, or report parameter values. To provide event handlers with access to report data, you must do the following:

- 1 Insert the HTML button in a container, such as a table, that provides access to data.
- 2 For each type of data, create a variable for the HTML button using the Variables page on Property Editor. Figure 22-6 shows an HTML button variable named CustomerNotes whose value is set to the Notes column.

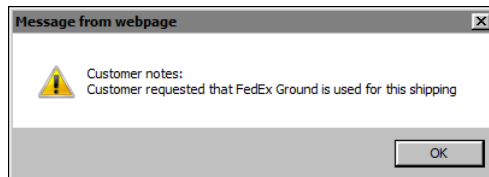


**Figure 22-6** Variable associated with an HTML button

After you create a variable, use `dataObject` to access the variable in an event handler. For example, to access the variable `CustomerNotes`, use `dataObject.CustomerNotes`, as shown in the following event handler code:

```
/**
 * Occurs when mouse clicks.
 * @param event */
this.onclick = function(event)
{
 alert("Customer notes: " +
 "\n" + dataObject.CustomerNotes);
}
```

This example uses the JavaScript `alert` function to display customer notes in a message box, as shown in Figure 22-7.



**Figure 22-7** Message box displaying a note when the HTML button is clicked

The next example shows how to use an HTML button to calculate the price of a product after applying a discount specified by the user at report view time. Figure 22-8 shows the report in the web viewer. The report lists the products and their MSRP (Manufacturer's Suggested Retail Price). Each product row contains a Discounted Price button for calculating the discounted price for that product.

| Product                        | MSRP   |                  |
|--------------------------------|--------|------------------|
| 1952 Alpine Renault 1300       | 214.3  | Discounted Price |
| 1972 Alfa Romeo GTA            | 136    | Discounted Price |
| 1962 LanciaA Delta 16V         | 147.74 | Discounted Price |
| 1968 Ford Mustang              | 194.57 | Discounted Price |
| 2001 Ferrari Enzo              | 207.8  | Discounted Price |
| 1969 Corvair Monza             | 151.08 | Discounted Price |
| 1968 Dodge Charger             | 117.44 | Discounted Price |
| 1969 Ford Falcon               | 173.02 | Discounted Price |
| 1970 Plymouth Hemi Cuda        | 79.8   | Discounted Price |
| 1969 Dodge Charger             | 115.16 | Discounted Price |
| 1993 Mazda RX-7                | 141.54 | Discounted Price |
| 1965 Aston Martin DB5          | 124.44 | Discounted Price |
| 1948 Porsche 356-A Roadster    | 77     | Discounted Price |
| 1995 Honda Civic               | 142.25 | Discounted Price |
| 1998 Chrysler Plymouth Prowler | 163.73 | Discounted Price |
| 1999 Indy 500 Monte Carlo SS   | 132    | Discounted Price |

**Figure 22-8** Product report using HTML buttons to calculate discounted prices  
 When the user clicks a button, a window prompts the user to enter a discount percent, as shown in Figure 22-9.

Explorer User Prompt

Script Prompt:  
 Enter the discount percent:

OK Cancel

**Figure 22-9** Window prompting for a discount percent  
 After the user enters a value, such as 10, and chooses OK, another window displays the product's discounted price, as shown in Figure 22-10.

Message from webpage

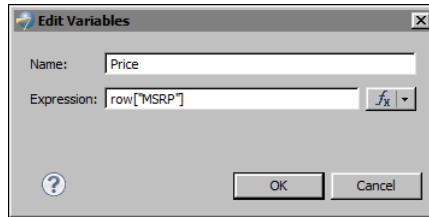
Discounted price: 192.87

OK

**Figure 22-10** Window displaying the discounted price  
 To create this HTML button, a button labeled Discounted Price is inserted in the detail row of a table. The HTML button's event handler code requires the MSRP



values to calculate the discounted price, so a variable is created. Figure 22-11 shows the definition of a variable named Price.



**Figure 22-11** Price variable defined for the HTML button

The event handler code for the HTML button is as follows:

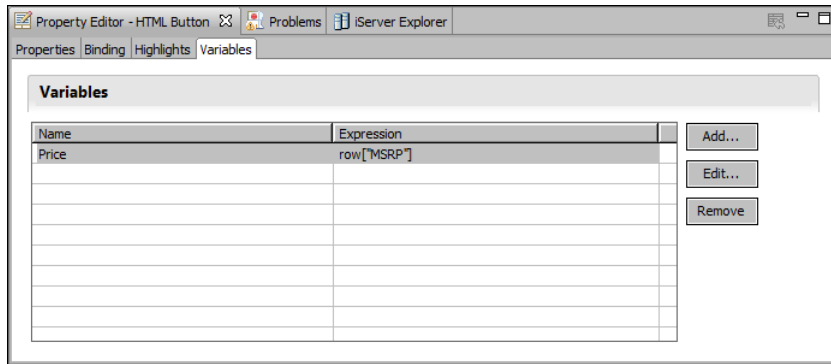
```
this.onclick = function(event)
{
 Discount = window.prompt('Enter the discount percent: ', '');
 DiscountedPrice = dataObject.Price - (dataObject.Price *
 (Discount/100));
 alert("Discounted price: " + DiscountedPrice);
}
```

The first line after the opening brace prompts the user for a discount value and stores the value in the Discount variable. The second line calculates the discounted price using the values in the Price and Discount variables. The third line displays the results in a message box. Note that this event handler code covers only the main tasks. A more complete event handler would also perform data validation to ensure that the input value is a number, and handle the case if the user chooses Cancel at the prompt.

#### How to add a variable to an HTML button

- 1 In the layout editor, select the HTML button to which to add a variable.
- 2 Choose Property Editor, then choose the Variables tab.
- 3 In Variables, choose Add.
- 4 In Add Variables, specify the following values:
  - 1 In Name, type a unique name for the variable. JavaScript event handlers use the name to access the variable's information through dataObject. For example, the event handler accesses a variable named credit as dataObject.credit.
  - 2 In Expression, type the value that the variable contains. You can also use Expression Builder to create a value. Choose OK.

Variables displays the variable you created, as shown in Figure 22-12.



**Figure 22-12** Variable defined for an HTML button

## Using the Actuate JavaScript API

Actuate provides a JavaScript API (JSAPI) to support the integration of Actuate technology with web applications. Application developers can use the API to embed entire reports or individual report elements, such as charts or tables, into existing web pages.

HTML button event handlers can also use JSAPI to access report elements, manipulate data, and refresh a report in the Actuate viewer. For example, you can use the JSAPI to implement interactive functionality in the viewer, such as sorting and filtering data, linking to other report elements, and displaying or hiding report elements.

The three HTML buttons in the report shown in Figure 22-1, which provide three data filtering options, use methods in the JSAPI to get the current viewer, create the filters, and reload the report with new data each time the user clicks one of the buttons. The following is the event handler code for the Top Ten Products button:

```
this.onclick = function(event)
{
 //Get the current viewer object and the table with the
 //bookmark DetailTable on the current page.
 var viewer = this.getViewer();
 var pagecontents = viewer.getCurrentPageContent();
 var table = pagecontents.getTableByBookmark("DetailTable");

 //Create a top 10 filter on the table
 table.setFilters(new actuate.data.Filter("PRICE",
 actuate.data.Filter.TOP_N, "10"));

 //Reload the table
 table.submit();
}
```

The following is the event handler code for the All Products button:

```
this.onclick = function(event)
{
 var viewer = this.getViewer();
 var pagecontents = viewer.getCurrentPageContent();
 var table = pagecontents.getTableByBookmark("DetailTable");
 table.clearFilters("PRICE");
 table.submit();
}
```

The JSAPI provides many classes and methods that are useful for adding functionality to HTML buttons. For more information about using the JSAPI, see *Using Actuate JavaScript API*.

## Testing an HTML button

As mentioned previously, HTML buttons are supported in HTML reports only. To test the functionality of an HTML button, run the report in the web viewer. The previewer in the report editor does not support the Actuate JavaScript API. You can view an HTML button that contains JSAPI code in the previewer, but it does not respond to any button events.

---

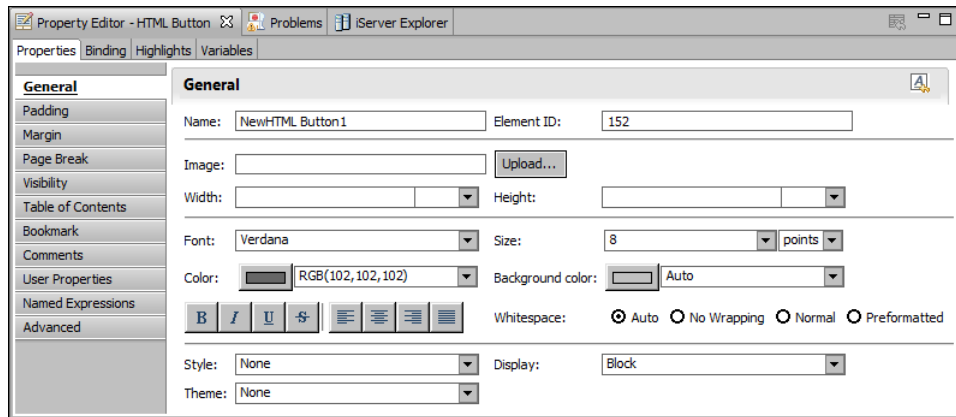
## Changing the appearance of an HTML button

As with other report elements, you can modify an HTML button by changing property values, such as its name, its value, or aspects of its appearance. The tabs on the property sheet for the element support altering the appearance, visibility, and other features.

The general properties page provides the ability to change the size, color, and the appearance of the text of the button. By default, the button's size adjusts to the length of the text on the button. If a report contains multiple buttons and you want all the buttons to be the same size, specify values for the Width and Height properties.

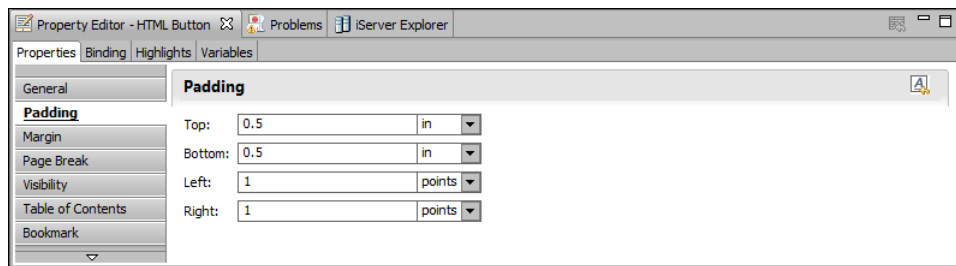
The general properties page also supports adding an image to the face of the button. Use the Upload button next to the Image property to add an image. Before doing so, make sure the image file is the appropriate size for the button. A button expands to display the image in its full size unless you specify Width and Height values. So, if an image is large, and you use the default auto-sizing feature, the button is large. If you use explicit Width and Height values, and the image is larger than the specified button size, the image is truncated. To change the size of an image, you must edit the image using a graphic editing tool.

Figure 22-13 shows the general properties for an HTML button.



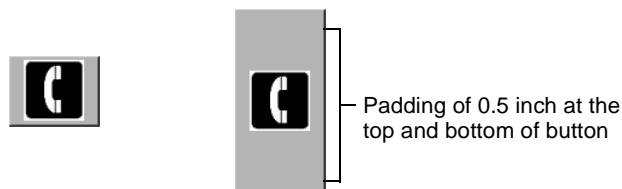
**Figure 22-13** General properties for an HTML button

Use the padding settings, as shown in Figure 22-14, to add extra space around the text or image on the face of the HTML button.



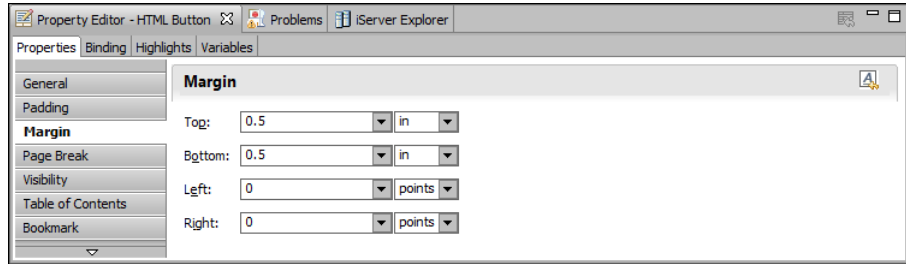
**Figure 22-14** Padding properties for an HTML button

Padding supports the use of different units, such as inches or points. When you add padding, it affects the HTML button as shown in Figure 22-15. The button on the left uses the default padding values. The button on the right uses padding values of 0.5 inch at the top and bottom.



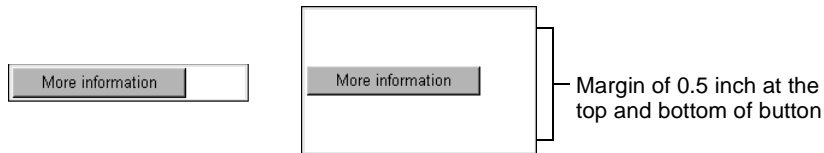
**Figure 22-15** Padding added to an HTML button using an image

Use the margin settings to increase the space around the entire button. Specifying margin values is similar to specifying padding values, as shown in Figure 22-16.



**Figure 22-16** Margin properties for an HTML button

However, whereas padding modifies the size of the HTML button, margins modify the space around the button and do not change the button size. Figure 22-17 shows two buttons, each within a cell. The button on the left uses the default margin values. The button on the right uses margin values of 0.5 at the top and bottom.



**Figure 22-17** Margin space around an HTML button in a table

Visibility, Page Break, Table of Contents, and other properties operate in the same manner as they do for other report elements.

### How to change the name or value of an HTML button

- 1 Double-click the HTML button.
- 2 In HTML Button, in Name, type the new button name. In Value, type the new value.
- 3 Choose OK. The HTML button displays the new value.



# Controlling user access to report pages and data

This chapter contains the following topics:

- About the security model
- Controlling user access to report pages
- Controlling user access to data

---

## About the security model

All files stored in an Actuate BIRT iServer Encyclopedia volume are subject to a standard security procedure, which restricts file access to authorized users. The iServer security model is based on roles and privileges. The iServer administrator creates roles for various job functions in an organization, such as finance, marketing, and sales. The privileges, or permissions, to perform certain operations, such as read, write, and execute, are assigned to roles. Users are assigned roles, and, through these roles, acquire the privileges to perform particular operations on folders and files.

With this level of security, each user has access to files and folders on a need-to-know basis. For security at a more detailed level, iServer provides the following types of security:

- Page-level security, which controls user access to particular sections or pages in a report. This security feature requires the Page Level Security option on iServer. The published report must be assigned the Secure Read privilege.
- Data security, which controls user access to a particular set of data provided by a BIRT data object. This security feature is part of the core iServer functionality. The published data object must be assigned the Secure Read privilege.

The security procedure that applies to files and folders in an iServer volume is implemented entirely in iServer. Page-level security and data security, however, require implementation in Actuate BIRT Designer as well.

### About access control lists (ACLs) and security IDs

Page-level and data security use the same security mechanism in Actuate BIRT Designer: access control lists.

An access control list (ACL) is a list of security IDs that tells iServer which users have access to a particular item in a report or data object. A security ID can be either a user name or a role defined in iServer. Typically, you use roles because they are more permanent than user names. A role can be assigned to different users at different times as employees leave or change positions.

To implement page-level and data security in Actuate BIRT Designer, perform the following tasks:

- In the report or data object, select the item to which to apply security.
- For the item's Access Control List Expression property, specify an expression that evaluates to a security ID or a list of security IDs.



## ACL expression syntax

The ACL expression must evaluate to a string, and can be either a JavaScript or EasyScript expression. If specifying multiple security IDs, separate each with a comma.

The following expressions are examples of ACL expressions in JavaScript. The first expression specifies a literal role name. The second expression specifies two literal role names. The third expression evaluates to role names, such as Sales Manager France or Sales Manager Canada. The fourth expression specifies two literal role names and an expression that evaluates to role names.

```
"CFO"
"CFO" + "," + "Sales VP"
"Sales Manager " + row["Country"]
"CFO" + "," + "Sales VP" + "," + "Sales Manager " + row["COUNTRY"]
```

The following ACL expressions are the EasyScript equivalent:

```
"CFO"
"CFO" & "," & "Sales VP"
"Sales Manager " & [Country]
"CFO" & "," & "Sales VP" & "," & "Sales Manager " & row["COUNTRY"]
```

---

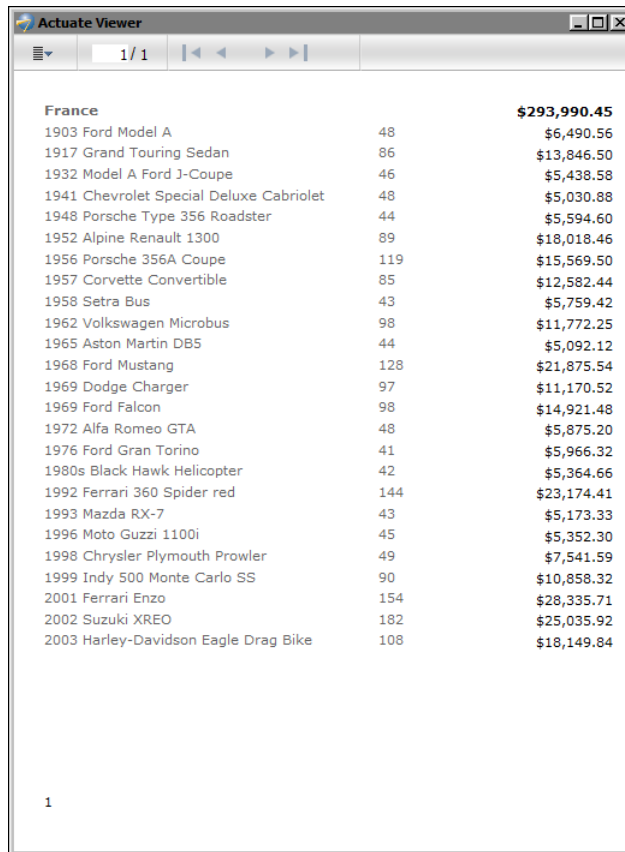
## Controlling user access to report pages

In a report that uses page-level security, report users can view only pages to which they have access. You can design a single report that meets the needs of a range of users. The most common case is to create a hierarchy of ACLs where each successive level has access to more information. The ACL hierarchy can match the organizational hierarchy of a company.

For example, in a report that provides worldwide sales data by region and country, you can restrict user access to the content as follows:

- Each country sales manager can view only the pages that display sales data for her country.
- Each regional sales manager can view all the pages that display sales data for the countries in her region.
- The vice president of sales can view the entire report.

Figure 23-1 shows the single page that the sales manager in France can view. Note that the page number is 1.

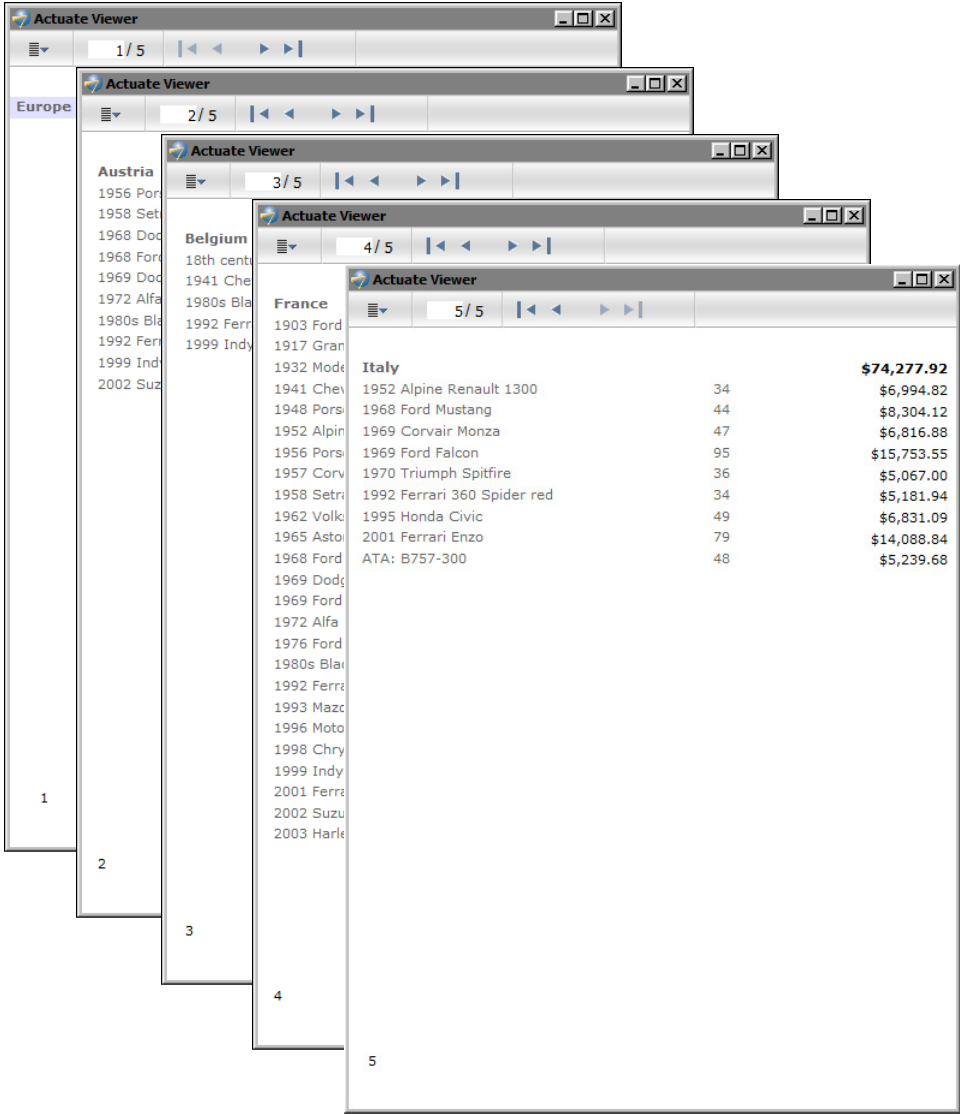


| France                                  |     | \$293,990.45 |
|-----------------------------------------|-----|--------------|
| 1903 Ford Model A                       | 48  | \$6,490.56   |
| 1917 Grand Touring Sedan                | 86  | \$13,846.50  |
| 1932 Model A Ford J-Coupe               | 46  | \$5,438.58   |
| 1941 Chevrolet Special Deluxe Cabriolet | 48  | \$5,030.88   |
| 1948 Porsche Type 356 Roadster          | 44  | \$5,594.60   |
| 1952 Alpine Renault 1300                | 89  | \$18,018.46  |
| 1956 Porsche 356A Coupe                 | 119 | \$15,569.50  |
| 1957 Corvette Convertible               | 85  | \$12,582.44  |
| 1958 Setra Bus                          | 43  | \$5,759.42   |
| 1962 Volkswagen Microbus                | 98  | \$11,772.25  |
| 1965 Aston Martin DB5                   | 44  | \$5,092.12   |
| 1968 Ford Mustang                       | 128 | \$21,875.54  |
| 1969 Dodge Charger                      | 97  | \$11,170.52  |
| 1969 Ford Falcon                        | 98  | \$14,921.48  |
| 1972 Alfa Romeo GTA                     | 48  | \$5,875.20   |
| 1976 Ford Gran Torino                   | 41  | \$5,966.32   |
| 1980s Black Hawk Helicopter             | 42  | \$5,364.66   |
| 1992 Ferrari 360 Spider red             | 144 | \$23,174.41  |
| 1993 Mazda RX-7                         | 43  | \$5,173.33   |
| 1996 Moto Guzzi 1100i                   | 45  | \$5,352.30   |
| 1998 Chrysler Plymouth Prowler          | 49  | \$7,541.59   |
| 1999 Indy 500 Monte Carlo SS            | 90  | \$10,858.32  |
| 2001 Ferrari Enzo                       | 154 | \$28,335.71  |
| 2002 Suzuki XREO                        | 182 | \$25,035.92  |
| 2003 Harley-Davidson Eagle Drag Bike    | 108 | \$18,149.84  |

1

**Figure 23-1** Page that the sales manager in France can view

Figure 23-2 shows the pages that the regional sales manager for Europe can view. The pages are numbered 1 through 5. Here, the sales data for France is on page 4, whereas, it is on page 1 in the report that the sales manager of France sees, as shown in Figure 23-1. The report displays page numbers sequentially in the order that they appear to a user.



**Figure 23-2** Pages that the regional sales manager for Europe can view

Figure 23-3 shows the full report, which only the vice president of sales can view.

The figure shows a stack of 11 Actuate Viewer windows, each displaying a different page of a report. The windows are numbered 1 through 11, corresponding to the pages of the report. The top window (page 11) shows a detailed table of car models and their prices.

| Year | Model                                   | Count | Price               |
|------|-----------------------------------------|-------|---------------------|
| 1955 | USA                                     |       | <b>\$496,322.14</b> |
| 1955 | 18th century schooner                   | 48    | \$5,898.72          |
| 1955 | 1903 Ford Model A                       | 223   | \$28,746.54         |
| 1955 | 1917 Grand Touring Sedan                | 316   | \$47,292.30         |
| 1955 | 1928 Mercedes-Benz SSK                  | 119   | \$19,090.90         |
| 1955 | 1932 Model A Ford J-Coupe               | 97    | \$11,296.39         |
| 1955 | 1940 Ford Pickup Truck                  | 48    | \$5,488.32          |
| 1955 | 1940s Ford truck                        | 47    | \$5,633.89          |
| 1955 | 1941 Chevrolet Special Deluxe Cabriolet | 58    | \$5,157.94          |
| 1955 | 1948 Porsche Type 356 Roadster          | 232   | \$29,979.64         |
| 1955 | 1949 Jaguar XK 120                      | 76    | \$6,215.28          |
| 1955 | 1952 Alpine Renault 1300                | 332   | \$65,361.44         |
| 1955 | 1952 Citroen-15CV                       | 59    | \$5,820.35          |
| 1955 | 1956 Porsche 356A Coupe                 | 137   | \$17,656.16         |
| 1955 | 1957 Chevy Pickup                       | 192   | \$21,557.76         |
| 1955 | 1957 Corvette Convertible               | 142   | \$17,188.27         |
| 1955 | 1958 Setra Bus                          | 49    | \$5,357.66          |
| 1955 | 1962 LanciaA Delta 16V                  | 220   | \$30,301.98         |
| 1955 | 1962 Volkswagen Microbus                | 184   | \$22,259.54         |
| 1955 | 1964 Mercedes Tour Bus                  | 143   | \$16,690.02         |
| 1955 | 1965 Aston Martin DB5                   | 152   | \$17,248.29         |
| 1955 | 1968 Dodge Charger                      | 94    | \$10,700.96         |
| 1955 | 1968 Ford Mustang                       | 222   | \$39,503.49         |
| 1955 | 1969 Corvair Monza                      | 130   | \$18,646.36         |
| 1955 | 1969 Ford Falcon                        | 241   | \$37,696.33         |
| 1955 | 1969 Harley Davidson Ultimate Chopper   | 59    | \$5,533.61          |

**Figure 23-3** Pages that the vice president of sales can view

Without page-level security, you would need to create multiple reports—one report for each user—and the iServer administrator would then have to define different security rules for each report, and manage multiple reports. In the sales report example, which presents data for three regions and eight countries, you would have to create twelve reports. For large companies, which typically have more hierarchical levels and more users, the number of reports increases.

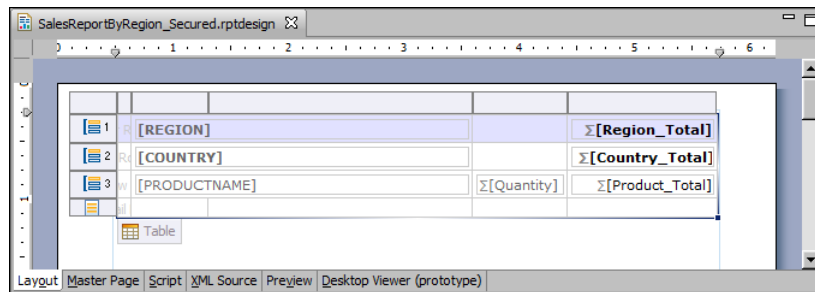
## Adding page-level security to a report

To implement page-level security in a report, perform the following tasks:

- Identify the sections that require security.  
The most common elements to which to apply security are tables, lists, grids, and groups defined in a table.
- Identify the users that can view each section.  
Obtain the security IDs, typically roles, from the iServer volume administrator.
- Set security.  
For each element that requires security, right click the element, then select Security from the context menu. Set the Access Control List Expression property to the security ID or IDs to which to grant access to the element's content.

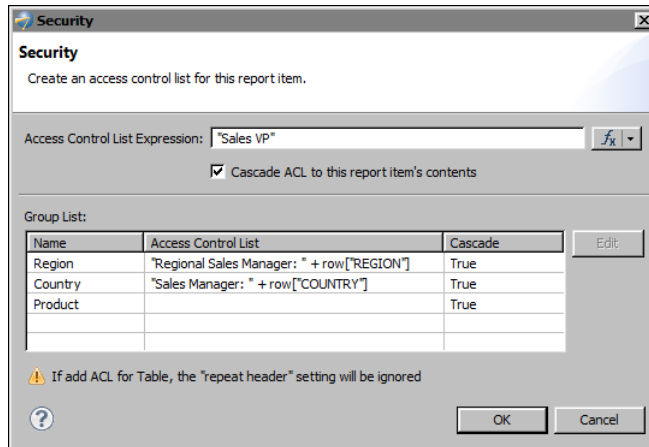
### Example 1

Figure 23-4 shows the design for the sales report shown in the previous section. The report design consists of a single table that groups data by region, country, and product.



**Figure 23-4** Design of report that groups sales data by region and country

Page-level security is applied to these elements: the table, the Region group, and the Country group. Figure 23-5 shows the Security dialog for the table element.



**Figure 23-5** Page-level security applied to the table and two of its groups

- The Access Control List Expression property is set to the value "Sales VP".
- The Cascade ACL option is selected. This setting propagates the specified ACL to all the elements in the table.

These settings specify that only the Sales VP has access to all of the table's contents.

- For the Region group:
  - The Access Control List expression is:
 

```
"Regional Sales Manager: " + row["REGION"]
```

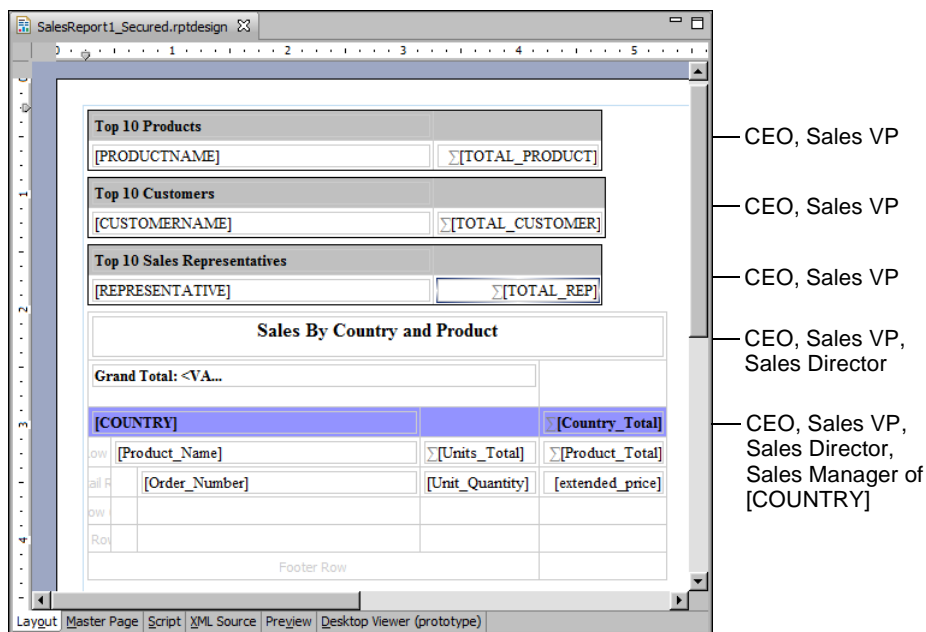
This expression specifies that data for each region is restricted to a specific regional sales manager role. For example, only a user with the Regional Sales Manager: Europe role can view the sales data for Europe.
  - Cascade is set to True. This value propagates the ACL to the elements in the Region group, providing the regional sales manager access to all the data within the Region group.
- For the Country group:
  - The Access Control List expression is:
 

```
"Sales Manager: " + row["COUNTRY"]
```

This expression specifies that data for each country is restricted to a specific sales manager role. For example, only a user with the Sales Manager: France role can view the sales data for France.
  - Cascade is set to True. This value propagates the ACL to the elements in the Country group, providing the sales manager access to all the data within the Country group.

## Example 2

This example shows how to implement page-level security in a report that contains multiple tables. Figure 23-6 shows a report design that contains four tables and identifies the roles that can view each table. The last table shows detailed sales data grouped by country and product. The CEO, Sales VP, and Sales Director can view all the content in this table. Each sales manager can view only the sales data for her country.



**Figure 23-6** Design of report that contains four tables and the roles that can access each table

There are several ways to implement page-level security in this report. You can:

- Select each table and set each table's Access Control List Expression property to the roles identified in Figure 23-6.

The ACL for the first, second, and third tables would be:

```
"CEO" + "," + "Sales VP"
```

The ACL for the first fourth table would be:

```
"CEO" + "," + "Sales VP" + "," + "Sales Director"
```

The ACL for the Country group in the fourth table would be:

```
"CEO" + "," + "Sales VP" + "," + "Sales Director" + "," +
"Sales Manager of " + row["COUNTRY"]
```

- Use the Cascade ACL option to cascade security IDs from a container element to its contents. Because the CEO and Sales VP roles can view the entire report, it is more efficient to specify the ACL once at the topmost container, the report element, than it is to specify the same ACL multiple times.

The ACL for the report element would be:

```
"CEO" + "," + "Sales VP"
```

The ACL for the fourth table would be:

```
"Sales Director"
```

The ACL for the Country group in the fourth table would be:

```
"Sales Manager of " + row["COUNTRY"]
```

- Add a grid to the report, place all the tables in the grid, and cascade the "CEO" + "," + "Sales VP" ACL expression from the grid instead of from the report element. This design is more versatile than the previous one because it is often practical to leave the ACL at the report level blank to grant all users access to the report. Later, if you add new sections, such as a title page, for a broader range of users, it is easier to start with the rule that all users can view all the content in a report, then restrict access to particular sections.

The report examples in this section illustrate several key concepts about page-level security, which are summarized next. Understanding these concepts can help you design a report to use page-level security.

- When an element's ACL expression property is blank, there are no viewing restrictions for that element, except those restrictions (determined by the ACLs) that the element inherits from its container.
- An element inherits the ACLs from its container when the container's Cascade ACL option is selected. This option, selected by default, means that a user who is permitted to view a container can also view all elements within the container.
- The report element is the topmost container. If its ACL expression property is blank, BIRT assigns an internal ACL of "\_\_all" to the report. This setting combined with the selected Cascade ACL option ensures that a report created initially is accessible to all users.
- BIRT generates one report document, inserting a page break between elements that have different ACLs. This concept explains why some pages display just a group header, as Figure 23-3 shows, when groups in a table have different ACLs.

## Enabling and disabling page-level security

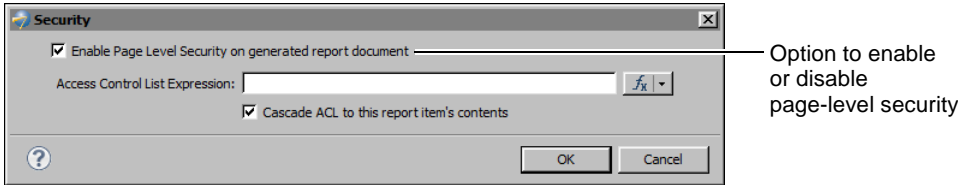
For ACLs to take effect when the report is run on iServer, you must enable page-level security in the report design. When enabled, BIRT generates a report



that consists of pages, which are restricted to users with specified security IDs. If you decide later to make the entire report available to users, all you do is disable the page-level security option. You do not have to remove the ACLs.

**How to turn page-level security on or off**

- 1 In the layout editor, right-click a blank area of the report, then select Security.
- 2 In Security, shown in Figure 23-7, either select or deselect Enable Page Level Security on generated report document.



**Figure 23-7** Enabling page-level security

**Configuring page numbers**

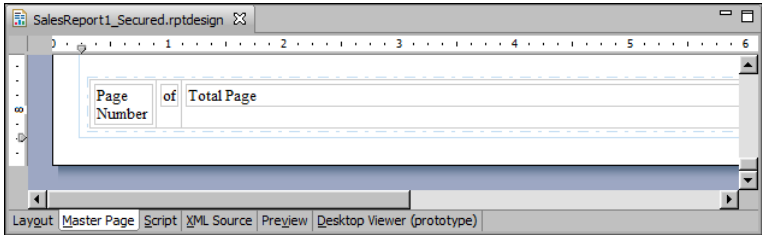
A report that uses page-level security provides two options for displaying page numbers. The report can display page numbers sequentially in the order that they appear to a user. For example, if a user can view pages 1, 5, 6, and 8 of a report, the page numbers that the user sees are 1, 2, 3, and 4. Alternatively, the report can display the actual page numbers 1, 5, 6, and 8.

Similarly, for page number formats that include the total page count, such as 1 of 4, the total page count can be the number of pages visible to the user or the number of pages in the report.

**How to configure page numbers**

This procedure assumes that the report already contains page number elements.

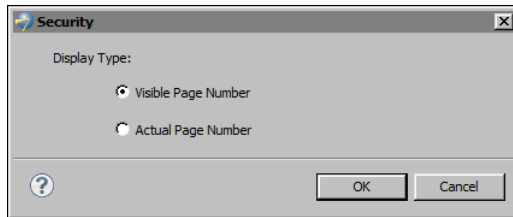
- 1 Choose Master Page to view the page number elements. Figure 23-8 shows an example of a master page where the footer contains three elements to display page numbers in the format 1 of 10.



**Figure 23-8** Master page containing page number elements

- 2 Right-click the Page Number element and choose Security.

- 3 In Security, shown in Figure 23-9, select a display option, then choose OK.
  - Select Visible Page Number to display numbers sequentially in the order that the pages appear to the user.
  - Select Actual Page Number to display the numbers as they appear in the entire report.



**Figure 23-9** Selecting a page-numbering option

- 4 If the page number format includes a total page count, as shown in the sample master page in Figure 23-8, use the instructions in the previous step to select a display option for the Total Page element.

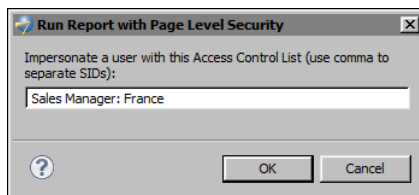
## Testing page-level security

Actuate BIRT Designer supports the simulation of secure report viewing, so that you can test page-level security without having to publish the report to iServer, log in with different user credentials, run the report and verify its output.

### How to test page-level security

- 1 Make sure page-level security is enabled. This procedure is described earlier in this chapter.
- 2 Choose Run→View Report with Page Security, and select the output format in which to view the report.
- 3 In Run Report with Page Level Security, shown in Figure 23-10, type a security ID specified in an ACL. For example:

Sales Manager: France



**Figure 23-10** Using a specified security ID

Choose OK. The report runs and displays only the page or pages that the specified security ID can view.

- 4 Repeat the previous step until you finish testing all the security IDs used in the report.

---

## Controlling user access to data

In addition to page-level security, iServer also supports data security, which controls user access to a particular set of data provided by a BIRT data object. For example, you can design a data object that returns one set of data rows for one group of dashboard or report users, and a different set for another group of users.

You can limit access to the following items in a data object:

- A data set, its rows and columns
- A cube, its measures, dimensions, dimension levels, and dimension members

After designing the data object, generate a data object store (a .data file) and publish this file to an iServer volume. iServer supports data security on .data files, but not on .datadesign files.

A user can only see and use the data items to which she is granted access. The security rules apply to users designing a dashboard in BIRT 360 or a report in BIRT Studio, as well as, users running a dashboard or report.

Unlike page-level security, the concept of cascading, or inherited, ACLs does not apply to data security. A cube does not inherit the ACL specified for the data set that the cube uses. Similarly, a joined data set does not inherit ACLs specified for the underlying data sets.

### Adding security to a data object

To implement security in a data object, perform the following tasks:

- Identify the data items that require security.
- Identify the users that can view each item. Obtain the security IDs, typically roles, from the iServer volume administrator.
- In the data object design (.datadesign), for each item that requires security, set the item's Access Control List Expression property to the security ID or IDs to which to grant access to the item.

### Adding security to a data set

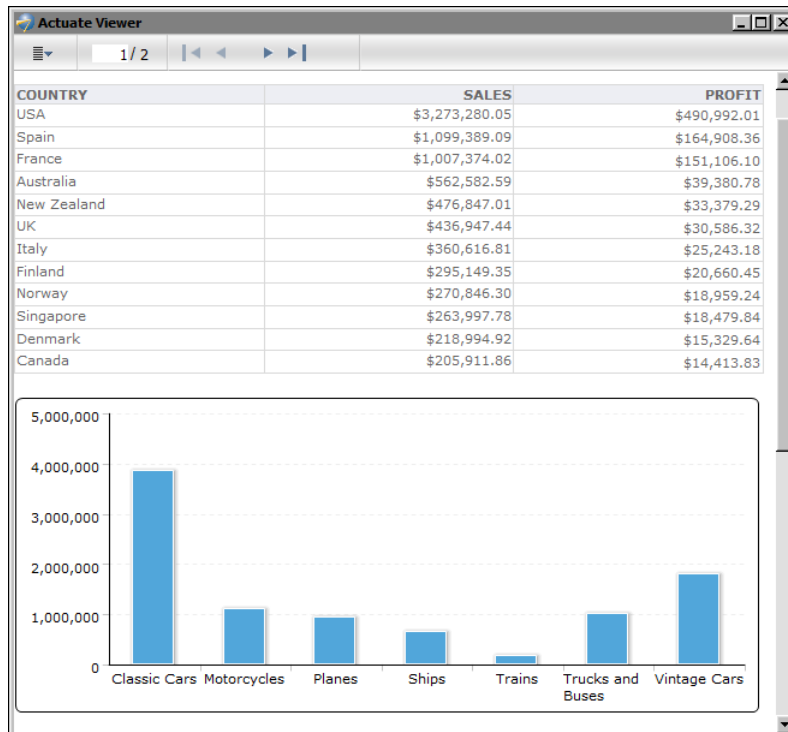
To apply security to a data set, select Security, then specify the security IDs in Access Control List Expression. Figure 23-11 shows an example where the expression specified for the data set's Access Control List Expression property is:

```
"CEO" + ", " + "CFO"
```



**Figure 23-11** Data security applied to the data set

In the example, only users with the CEO or CFO role can access the data set. For example, in a report that contains a table that uses the secured data set, only the CEO and CFO can view the data in the table, as shown in Figure 23-12. Other users see an empty table, as shown in Figure 23-13.

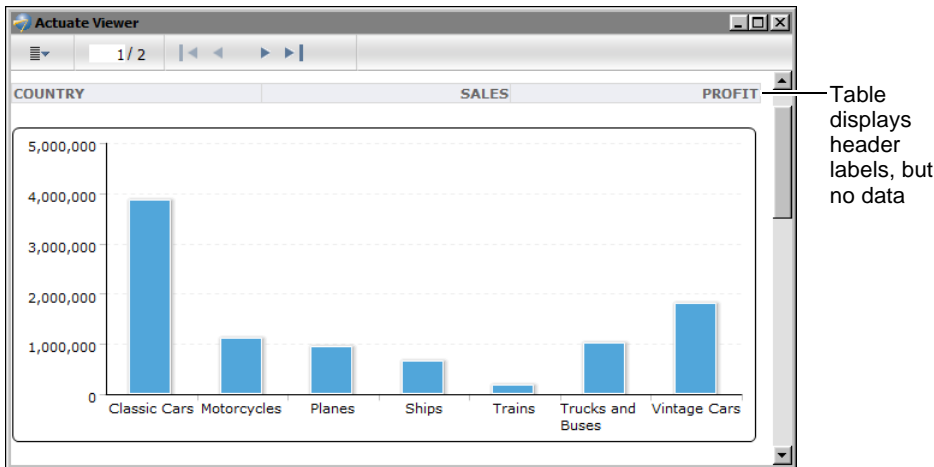


**Figure 23-12** Preview of the report for the CEO and CFO roles

As Figure 23-13 shows, the table does not display data from the secured data set, but the labels in the table's header appear. To hide the entire table if there is no

data, use the table's Visibility property. Specify an expression, as shown in the following example, as the condition for hiding the table. In the expression, Row\_Count is a column binding that uses the COUNT function to return the number of rows in the table.

```
row["Row_Count"] == null
```

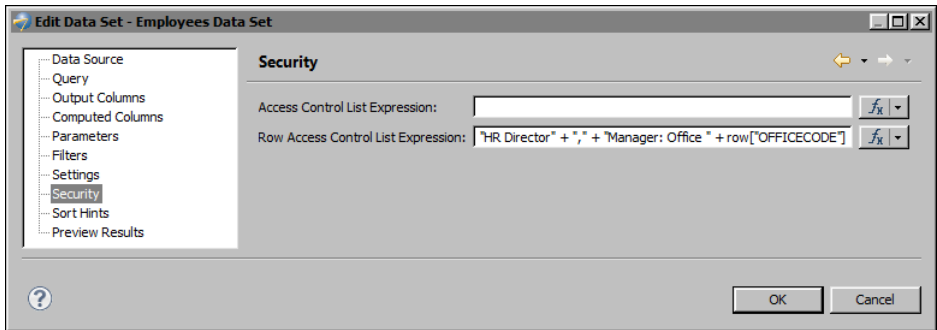


**Figure 23-13** Preview of the report for roles other than CEO or CFO

You can also apply security to rows in a data set, which is a typical approach. To do so, specify the security IDs in Row Access Control List Expression.

Figure 23-14 shows an example where the expression specified for the Row Access Control List Expression property is:

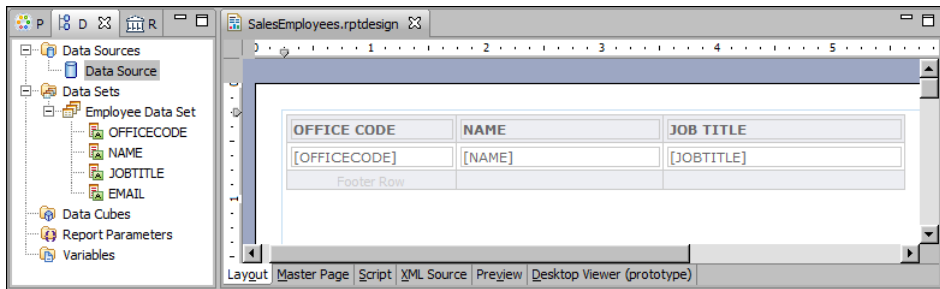
```
"HR Director" + "," + "Manager: Office " + row["OFFICECODE"]
```



**Figure 23-14** Data security applied to data set rows

Security applied to data set rows acts as a filter. In the example shown in Figure 23-14, the HR Director can view all rows in the data set. Managers can view only rows that pertain to their department as specified by the office code.

Figure 23-15 shows a report design that uses the secured data object. In the design, a table contains data elements that access the data set columns in the data object.



**Figure 23-15** Report design that uses data from a data set in a secured data object

When run and viewed by the HR Director, the report displays all the rows in the data set, as shown in Figure 23-16.

| OFFICE CODE | NAME              | JOB TITLE            |
|-------------|-------------------|----------------------|
| 1           | Diane Murphy      | President            |
| 1           | Mary Patterson    | VP Sales             |
| 1           | Jeff Firrelli     | VP Marketing         |
| 1           | Anthony Bow       | Sales Manager (NA)   |
| 1           | Leslie Jennings   | Sales Rep            |
| 1           | Leslie Thompson   | Sales Rep            |
| 2           | Julie Firrelli    | Sales Rep            |
| 2           | Steve Patterson   | Sales Rep            |
| 3           | Foon Yue Tseng    | Sales Rep            |
| 3           | George Vanauf     | Sales Rep            |
| 4           | Gerard Bondur     | Sale Manager (EMEA)  |
| 4           | Loui Bondur       | Sales Rep            |
| 4           | Gerard Hernandez  | Sales Rep            |
| 4           | Pamela Castillo   | Sales Rep            |
| 4           | Martin Gerard     | Sales Rep            |
| 5           | Mami Nishi        | Sales Rep            |
| 5           | Yoshimi Kato      | Sales Rep            |
| 6           | William Patterson | Sales Manager (APAC) |
| 6           | Andy Fixter       | Sales Rep            |
| 6           | Peter Marsh       | Sales Rep            |
| 6           | Tom King          | Sales Rep            |
| 7           | Larry Bott        | Sales Rep            |
| 7           | Barry Jones       | Sales Rep            |

**Figure 23-16** Preview of the report for the HR Director role

When run and viewed by the manager of a specific office code, the report displays only the rows for that office. Figure 23-17 shows the report that Manager: Office 4 sees.

| OFFICE CODE | NAME             | JOB TITLE           |
|-------------|------------------|---------------------|
| 4           | Gerard Bondur    | Sale Manager (EMEA) |
| 4           | Loui Bondur      | Sales Rep           |
| 4           | Gerard Hernandez | Sales Rep           |
| 4           | Pamela Castillo  | Sales Rep           |
| 4           | Martin Gerard    | Sales Rep           |

**Figure 23-17** Preview of the report for the Manager: Office 4 role

As the example shows, applying security to data set rows is useful for creating a single data set that provides different data to different users.

You can also apply security to each column in a data set. For example, you can restrict a profit/loss column or a salary column to users with executive-level roles. To do so, select Output Columns, select the column, then specify the security IDs in Access Control List Expression. Figure 23-18 shows an example where the expression specified for a column's Access Control List Expression property is:

"Sales VP"

**Edit Output Column**

Name: PROFIT

Type: Float

Alias:

Analysis Type: Measure

Display:

Display Name: PROFIT

Display Name Key:

Format as: Unformatted

Alignment: Right

Heading:

Help Text:

Access Control List Expression: \*Sales VP

Link To: None

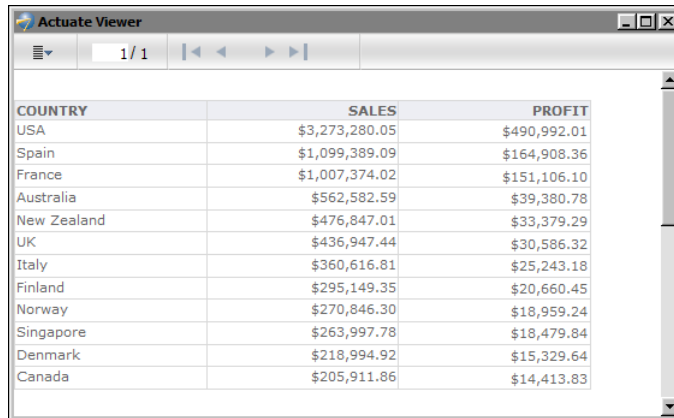
☐ Index this column in generated datadesign for faster lookup.

☐ Remove duplicated values in the generated data file.

OK Cancel

**Figure 23-18** Data security applied to a column in a data set

In the example, only users with the Sales VP role can access data in the PROFIT column. Figure 23-19 shows a report using the PROFIT column and how the report appears to a user with the Sales VP role.

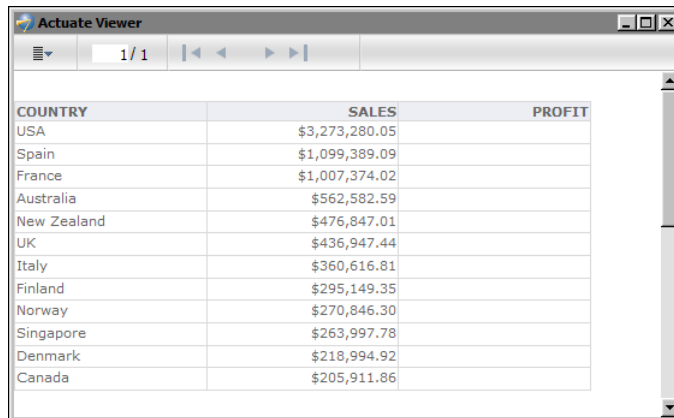


| COUNTRY     | SALES          | PROFIT       |
|-------------|----------------|--------------|
| USA         | \$3,273,280.05 | \$490,992.01 |
| Spain       | \$1,099,389.09 | \$164,908.36 |
| France      | \$1,007,374.02 | \$151,106.10 |
| Australia   | \$562,582.59   | \$39,380.78  |
| New Zealand | \$476,847.01   | \$33,379.29  |
| UK          | \$436,947.44   | \$30,586.32  |
| Italy       | \$360,616.81   | \$25,243.18  |
| Finland     | \$295,149.35   | \$20,660.45  |
| Norway      | \$270,846.30   | \$18,959.24  |
| Singapore   | \$263,997.78   | \$18,479.84  |
| Denmark     | \$218,994.92   | \$15,329.64  |
| Canada      | \$205,911.86   | \$14,413.83  |

**Figure 23-19** Preview of the report for the Sales VP role

Figure 23-20 shows the same report, but as viewed by a user without the Sales VP role. There is no data in the PROFIT column; only the PROFIT label appears in the table header. To hide the entire column if there is no data, set the column's Visibility property to an expression, such as the following:

```
row["PROFIT"] == null
```



| COUNTRY     | SALES          | PROFIT |
|-------------|----------------|--------|
| USA         | \$3,273,280.05 |        |
| Spain       | \$1,099,389.09 |        |
| France      | \$1,007,374.02 |        |
| Australia   | \$562,582.59   |        |
| New Zealand | \$476,847.01   |        |
| UK          | \$436,947.44   |        |
| Italy       | \$360,616.81   |        |
| Finland     | \$295,149.35   |        |
| Norway      | \$270,846.30   |        |
| Singapore   | \$263,997.78   |        |
| Denmark     | \$218,994.92   |        |
| Canada      | \$205,911.86   |        |

**Figure 23-20** Preview of the report for roles other than Sales VP

Security at the column level also controls the availability of certain columns to users designing a dashboard in BIRT 360 or a report in BIRT Studio.

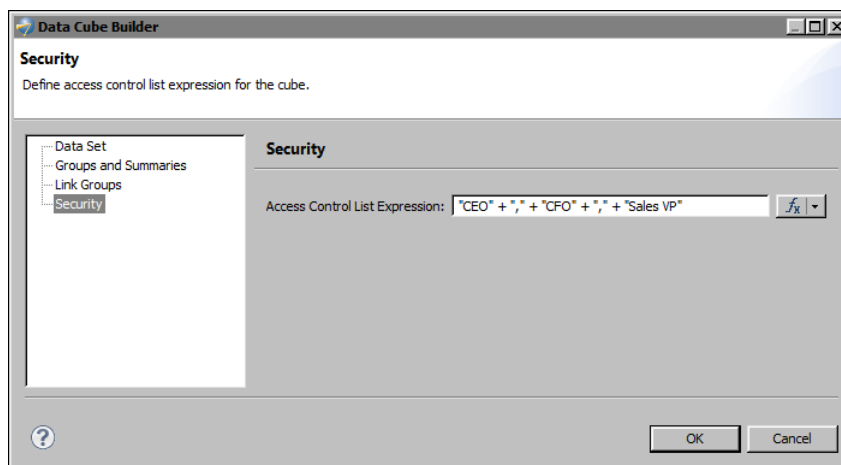


## Adding security to a cube

To apply security to a cube, in the cube builder, choose Security, then specify the security IDs in Access Control List Expression. Figure 23-21 shows an example where the expression specified for the Access Control List Expression property is:

```
"CEO" + "," + "CFO" + "," + "Sales VP"
```

Only users with the CEO, CFO, or Sales VP role have access to the cube. For example, in a report that contains a cross tab that uses the secured cube, only the CEO, CFO, and Sales VP can view the data in the cross tab. Other users see an empty cross tab. Similarly, in BIRT Studio or BIRT 360, only users with those roles can see and use the secured cube in their report designs or dashboards.



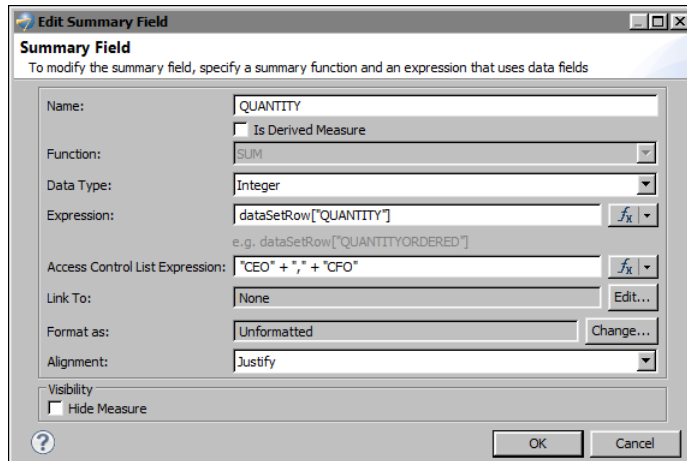
**Figure 23-21** Data security applied to a cube

Within a cube, you can limit access to each measure and dimension. For example, you can restrict a profit measure to users with executive-level roles. In the cube builder, choose Groups and Summaries, select the dimension or measure, then specify the security IDs in the Access Control List Expression property.

Figure 23-22 shows an example where the expression specified for a measure's Access Control List Expression property is:

```
"CEO" + "," + "CFO"
```

In a report that contains a cross tab that uses this cube, only the CEO and CFO can view the QUANTITY data in the cross tab.

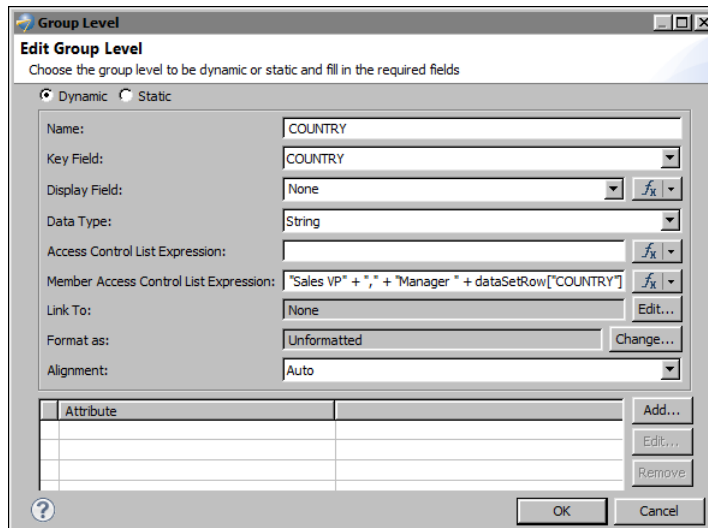


**Figure 23-22** Data security applied to a cube measure

With a dimension, you can also restrict access according to the dimension's values, or members. For example, you can provide executives access to sales data for all countries and restrict managers to sales data for their respective countries. Figure 23-23 shows security applied to the members of a Country dimension. The expression specified for the Member Access Control List Expression property is:

"Sales VP" + "," + "Manager " + dataSetRow["COUNTRY"]

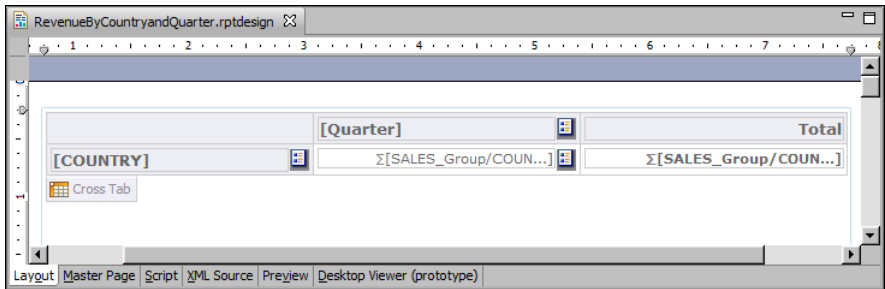
In this example, the Sales VP can view data for all countries. Managers can view only data for their country.



**Figure 23-23** Data security applied to members of a dimension

Notice that the Group Level dialog box, as shown in Figure 23-23, displays two ACL properties. Access Control List Expression controls access to the dimension (users either have access to the entire dimension or not at all), whereas, Member Access Control List Expression controls access to specific data within the dimension.

Figure 23-24 shows a report design, which uses the data object that contains the cube with security applied to its country dimension. In the report design, a cross tab uses data from the cube to display sales totals by country and by quarter.



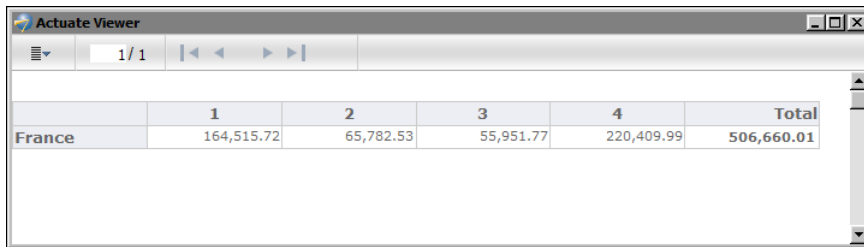
**Figure 23-24** Report design that uses data from the secured cube

When the report is run and viewed by a user with the Sales VP role, the cross tab displays sales data for all countries, as shown in Figure 23-25.

|             | 1          | 2          | 3          | 4          | Total        |
|-------------|------------|------------|------------|------------|--------------|
| USA         | 220,975.88 | 273,159.10 | 369,912.42 | 662,452.25 | 1,526,499.65 |
| France      | 164,515.72 | 65,782.53  | 55,951.77  | 220,409.99 | 506,660.01   |
| Spain       | 97,316.09  | 108,642.01 | 20,009.53  | 213,914.21 | 439,881.84   |
| UK          | 32,306.03  | 45,443.54  |            | 160,444.36 | 238,193.93   |
| New Zealand | 31,670.37  | 75,050.74  | 35,034.57  | 91,606.59  | 233,362.27   |
| Australia   | 44,894.74  |            | 45,221.86  | 114,096.58 | 204,213.18   |
| Italy       | 7,612.06   |            | 133,842.25 | 37,654.09  | 179,108.40   |
| Germany     | 33,820.62  |            | 31,310.09  | 68,700.99  | 133,831.70   |
| Japan       | 47,177.59  | 37,221.54  |            | 48,927.64  | 133,326.77   |
| Canada      |            | 52,281.87  | 37,527.58  | 33,594.58  | 123,404.03   |
| Switzerland | 47,375.92  |            | 61,402.00  |            | 108,777.92   |
| Singapore   | 22,474.17  | 44,160.92  | 41,397.32  |            | 108,032.41   |
| Sweden      |            |            | 48,809.90  | 59,019.88  | 107,829.78   |
| Denmark     |            | 32,922.43  |            | 74,310.20  | 107,232.63   |
| Norway      |            |            | 44,798.17  | 52,514.46  | 97,312.63    |
| Finland     |            | 44,607.13  | 34,341.08  |            | 78,948.21    |
| Belgium     | 16,901.38  |            | 45,352.47  | 12,081.52  | 74,335.37    |
| Ireland     | 32,538.74  |            | 17,359.53  |            | 49,898.27    |
| Austria     |            |            | 6,419.84   | 42,813.83  | 49,233.67    |
| Philippines |            |            |            | 15,822.84  | 15,822.84    |

**Figure 23-25** Preview of the cross tab for the Sales VP role

When the report is run and viewed by the manager of a specific country, the cross tab displays only sales data for his or her specific country. Figure 23-26 shows the cross tab that the Manager France role sees.



The screenshot shows the Actuate Viewer application window. At the top, there's a navigation bar with a dropdown menu, a page indicator '1 / 1', and navigation buttons. Below this is a cross tab table. The table has six columns: 'France', '1', '2', '3', '4', and 'Total'. The 'France' row contains the following values: 164,515.72, 65,782.53, 55,951.77, 220,409.99, and 506,660.01.

|        | 1          | 2         | 3         | 4          | Total      |
|--------|------------|-----------|-----------|------------|------------|
| France | 164,515.72 | 65,782.53 | 55,951.77 | 220,409.99 | 506,660.01 |

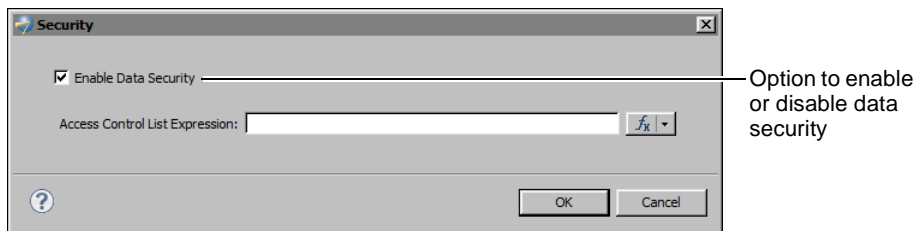
**Figure 23-26** Preview of the cross tab for the Manager France role

## Enabling and disabling data security

For ACLs to take effect, you must enable data security in the data object. If you decide later to make all the data in the data object available to users, all you do is disable data security. You do not have to remove the ACLs.

### How to turn data security on or off

- 1 In the layout editor, right-click in an empty area of the data object design, then select Security.
- 2 In Security, shown in Figure 23-27, either select or deselect Enable Data Security.



**Figure 23-27** Enabling data security

## Testing data security

Actuate BIRT Designer supports the simulation of viewing reports with data security. You can test data security in a report without having to publish the report to iServer, log in with different user credentials, run the report and verify its output.

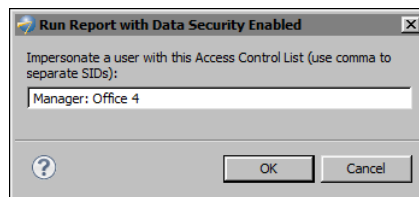
To test data security from the perspective of a user designing a dashboard in BIRT 360 or a report in BIRT Studio, you need to run tests on the iServer. The testing procedure entails the following steps:

- Publishing the data object (.data file) to an iServer volume
- Sharing the data object with selected users or roles, and assigning the Secure Read privilege
- Logging in with each user credential
- Launching the dashboard design tool or BIRT Studio, and using the data object as a source of data for the dashboard or report.

#### How to test data security in a report in Actuate BIRT Designer

- 1 Using Actuate BIRT Designer, build a report that uses a secure data object store (.data) as its data source. For information about this procedure, see Chapter 4, “Accessing data in a data object.”
- 2 When you finish building the report, choose Run→View Report with Data Security, and select the output format in which to view the report.
- 3 In Run Report with Data Security Enabled, shown in Figure 23-28, type a security ID specified in an ACL in the data object. For example:

Manager: Office 4



**Figure 23-28** Running a report with data security using a specified security ID  
Choose OK.

The report runs and displays only the content that the specified security ID can view.

- 4 Repeat the previous step until you finish testing all the security IDs used in the report.



# Accessing iServer environment information

This chapter contains the following topics:

- Writing event handlers to retrieve iServer environment information
- Debugging event handlers that use the iServer API
- iServer API reference

---

## Writing event handlers to retrieve iServer environment information

Report developers distribute reports to users by publishing them to Actuate BIRT iServer. Sometimes a report requires information about the iServer environment to implement application or business logic based on, for example, the security credentials of the user running the report, the browser in which the report is viewed, the server volume on which the report is run, and so on. BIRT provides an API, referred to in this chapter as the iServer API, that enables access to this type of information.

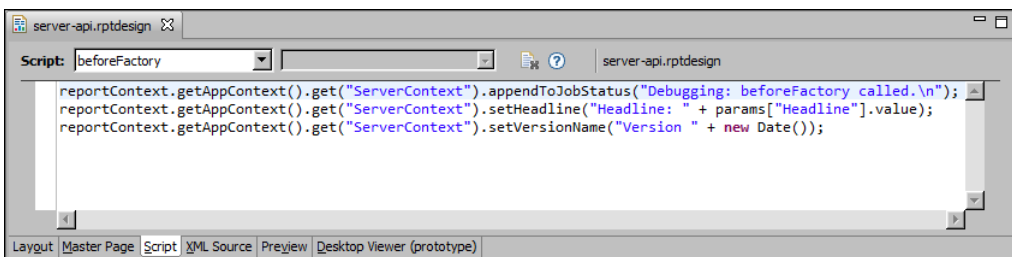
To use the iServer API in a report, you write event handler scripts in either Java or JavaScript. BIRT event handlers are associated with all the elements that make up a report, such as data sources, data sets, tables, charts, and labels. When a report is run, BIRT fires events and executes event handlers in a specific sequence to generate and render the report.

Writing event handlers in a report requires knowledge of the BIRT event model. For information about the event model and details about writing event handlers in Java and JavaScript, see *Integrating and Extending BIRT*. This chapter describes the additional requirements for accessing and debugging the iServer API in an event handler.

### Writing a JavaScript event handler

You write a JavaScript event handler that uses the iServer API the same way you write other event handlers. In Actuate BIRT Designer, you select an element, such as the report design or a table, then use the script editor to select an event, such as `beforeFactory` or `onCreate`, for which to write an event handler.

Figure 24-1 shows the script editor displaying event-handling code written for the report design's `beforeFactory` event.



**Figure 24-1** Event-handling code in the script editor



## Writing a Java event handler

Writing a Java event handler that uses the iServer API is similar to writing other types of event handlers. You create a Java event handler class, make the class available to BIRT, and associate the class with a report element. The difference is the additional JAR files required to access the iServer API.

You must add the following JAR files in the build path and classpath when configuring the Java event handler project:

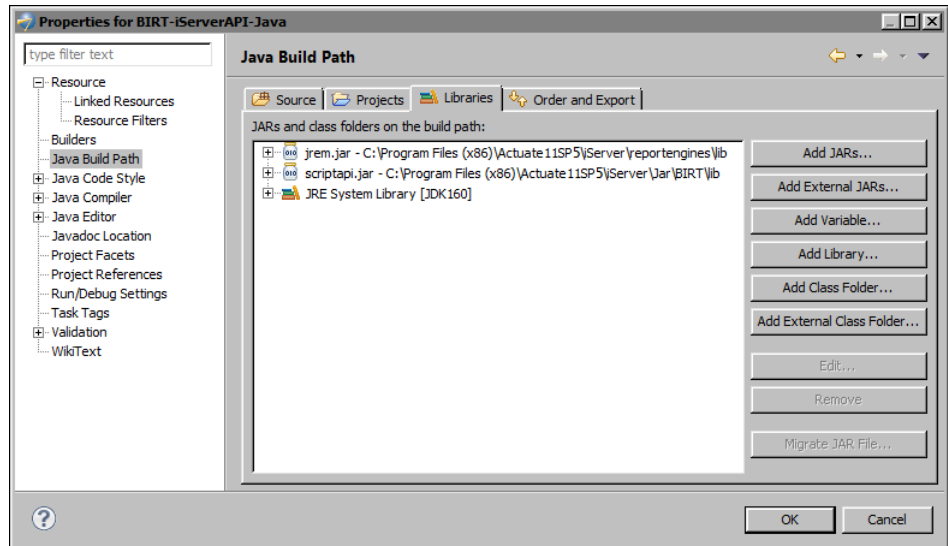
- \$ACTUATE\_HOME\iServer\Jar\BIRT\lib\scriptapi.jar

This JAR file provides the event handler classes and access to the reportContext object. If you use the ULocale methods, com.ibm.icu\_version.jar is also required. \$ACTUATE\_HOME is the location where iServer is installed.

- \$ACTUATE\_HOME\iServer\reportengines\lib\jrem.jar

This JAR file contains the definitions of the classes and methods in the iServer API.

Figure 24-2 shows the build path of a Java project that uses the iServer API. In this example, Actuate BIRT Designer is installed on the same machine where iServer is installed. If Actuate BIRT Designer is installed on a different machine, you must copy the JAR files from the iServer machine to your workspace.



**Figure 24-2** Build path of a Java project that uses the iServer API

## About the serverContext object

The BIRT engine uses an object called `serverContext` to store information about the iServer environment. The `serverContext` methods and properties are defined in the `IServerContext` interface. The container for the `serverContext` object is the application context object `appContext`. The `appContext` object stores objects and values that are used in all phases of report generation and presentation.

The `appContext` object, in turn, is a property of the `reportContext` object. This object stores information associated with the instance of the report that is being generated or viewed. For example, the `reportContext` object stores information about report parameters, global variables, report output format, locale, the request that runs the report, and the application context. The `reportContext` class defines methods for setting and retrieving these properties. Every event handler in a BIRT report has access to the `reportContext` object. In Java, the `reportContext` object is an argument to all event-handler methods.

To call a method to retrieve iServer environment information, the code must reflect the relationships between the `serverContext`, `appContext`, and `reportContext` objects.

The following JavaScript code snippet shows how to call the `getVolumeName()` method to retrieve the name of the iServer volume in which a report runs:

```
reportContext.getAppContext().get("ServerContext").getVolumeName()
```

The following example shows the equivalent code snippet in Java:

```
IServerContext scontext;
scontext = (IServerContext)
 reportContext.getAppContext().get("ServerContext");
scontext.getVolumeName();
```

## JavaScript event handler example

The code example in Listing 24-1 uses the `getUserRoles()` method to retrieve the user's roles and displays the contents of a report element if the user role is Manager. This code can be used, for example, in the `onPrepare` event of a table element to hide or display the table depending on the user role. The code example also uses the `appendToJobStatus()` method to write messages about the user's roles to the server job status.

### Listing 24-1 JavaScript event handler

---

```
userRoles = reportContext.getAppContext().get("ServerContext")
 .getUserRoles();

reportContext.getAppContext().get("ServerContext")
 .appendToJobStatus("The user roles are:" + userRoles + "\n");
```

```

if (userRoles != null)
{
 for (i = 0; i < userRoles.size(); i++)
 {
 if (userRoles.get(i) == "Manager")
 {
 reportContext.setGlobalVariable("HideDetails", "false");
 reportContext.getAppContext().get("ServerContext")
 .appendToJobStatus("The user has a Manager role\n");
 break;
 }
 }
}

```

## Java event handler example

Like the JavaScript event handler in the previous section, the Java code example in Listing 24-2 uses the `getUserRoles()` method to retrieve the user's roles and displays the contents of a table if the user role is Manager. The `TableEH` class extends the `TableEventAdapter` class and implements the event-handler script in the `onPrepare` event method.

**Listing 24-2** Java event handler class

---

```

package server.api.eh;

import java.util.List;

import org.eclipse.birt.report.engine.api.script.IReportContext;
import org.eclipse.birt.report.engine.api.script.element.ITable;
import org.eclipse.birt.report.engine.api.script.eventadapter
 .TableEventAdapter;

import com.actuate.reportapi.engine.IServerContext;

public class TableEH extends TableEventAdapter {

 public void onPrepare(ITable tbl, IReportContext reportContext)
 {
 IServerContext scontext;
 scontext = (IServerContext)
 reportContext.getAppContext().get("ServerContext");
 List<String> userRoles = scontext.getUserRoles();
 scontext.appendToJobStatus("The user roles are:" + userRoles
 + "\n");
 }
}

```

```

 for (int i = 0; i < userRoles.size(); i++)
 {
 if (userRoles.get(i).contentEquals("Manager"))
 {
 reportContext.setGlobalVariable("HideDetails", "false");
 scontext.appendToJobStatus("The user has a Manager role
 \n");
 break;
 }
 }
 }
}

```

---

## Debugging event handlers that use the iServer API

A report that uses the iServer API returns the expected results only when it is run on iServer. When the report is run in Actuate BIRT Designer, the report cannot access the iServer to retrieve the server information, and the report typically returns null values. Therefore, you cannot debug the iServer API calls in the same way you debug other event handlers in Actuate BIRT Designer.

To debug iServer API calls, use the `appendToJobStatus()` method to write a debugging message for each event handler. For example, if you write a JavaScript event handler for the `beforeFactory` event, add the following line of debugging code:

```

reportContext.getAppContext().get("ServerContext")
 .appendToJobStatus("Debugging: beforeFactory called.\n");

```

In a Java event handler, write:

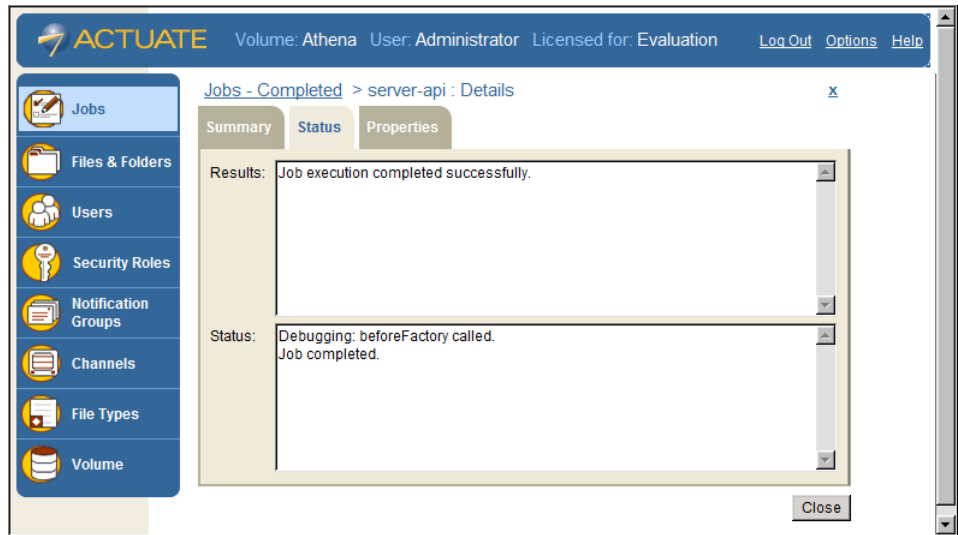
```

IServerContext scontext;
scontext = (IServerContext)
 reportContext.getAppContext().get("ServerContext");
scontext.appendToJobStatus("Debugging: beforeFactory called.\n");

```

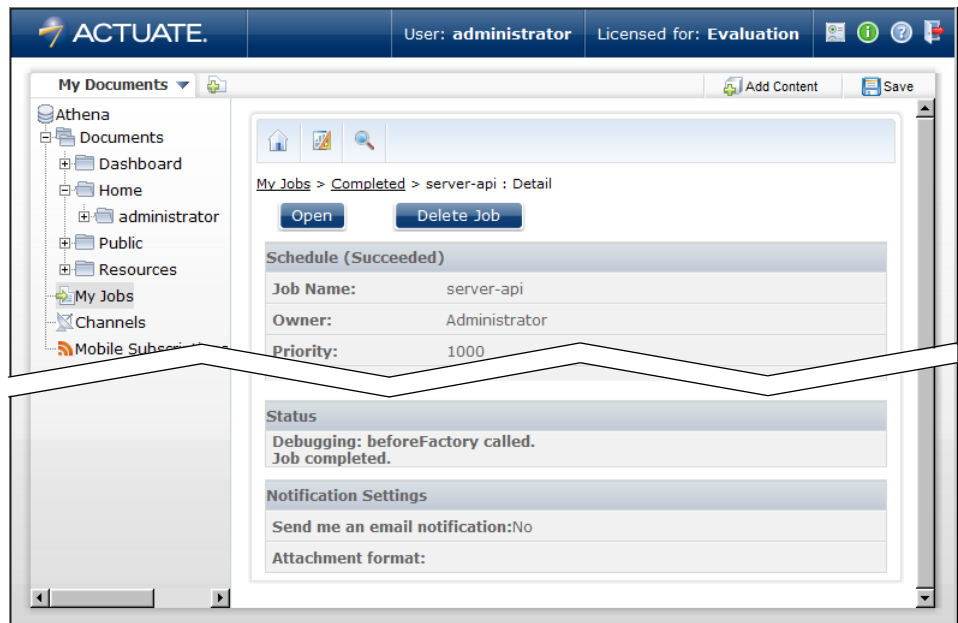
The `appendToJobStatus()` method writes a specified string message in the status section of a job-completion notice. After running the report on iServer, you can view these messages in either iServer Management Console or iServer Information Console.

In Management Console, choose **Jobs—Completed**, then choose the job's details. The job's Status page displays the debug messages in the Status section, as shown in Figure 24-3.



**Figure 24-3** Debug message in the job status page in Management Console

In Information Console, choose My Jobs—Completed, then choose Details next to the job whose status you want to review. The debug messages appear in the Status section in the job details page, as shown in Figure 24-4.



**Figure 24-4** Debug message in the status section in the job detail page in Information Console

---

## iServer API reference

This section lists all the methods in the iServer API in alphabetical order. Each method entry includes a general description of the method, the JavaScript and Java syntaxes, the result the method returns, and examples.

---

### appendToJobStatus( )

Appends a specified string to the status of the current job. iServer writes status messages for each report-generation job.

**JavaScript syntax**    `appendToJobStatus(statusString)`

**Java syntax**    `public void appendToJobStatus( String statusString )`

**Argument**    **statusString**  
The string to add to the job status.

**Usage**    Use to provide information for debugging purposes. For example, to verify that an event handler is executed, write a message indicating that the event method is called.

**JavaScript example**

```
reportContext.getAppContext().get("ServerContext")
 .appendToJobStatus("This message appears when beforeFactory is
 called.\n");
```

**Java example**

```
IServerContext scontext;
scontext = (IServerContext)
 reportContext.getAppContext().get("ServerContext");
scontext.appendToJobStatus("This message appears when
 beforeFactory is called.\n");
```

---

### getAuthenticationId( )

Retrieves the current user's authentication ID.

**JavaScript syntax**    `getAuthenticationId()`

**Java syntax**    `public String getAuthenticationId()`

**Usage**    Use in cases when the report application needs to pass the ID to another application, such as IDAPI calls to iServer.

**Returns**    An authentication ID in String format.

|                           |                                                                                                                                                         |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>JavaScript example</b> | <code>reportContext.getAppContext().get("ServerContext").getAuthenticationId();</code>                                                                  |
| <b>Java example</b>       | <pre>IServerContext scontext; scontext = (IServerContext)     reportContext.getAppContext().get("ServerContext"); scontext.getAuthenticationId();</pre> |

---

## getServerWorkingDirectory( )

Retrieves the path to the folder in the file system where temporary files are stored.

|                           |                                                                                                                                                               |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>JavaScript syntax</b>  | <code>getServerWorkingDirectory()</code>                                                                                                                      |
| <b>Java syntax</b>        | <code>public String getServerWorkingDirectory()</code>                                                                                                        |
| <b>Usage</b>              | Use to read or write information from and to the file system.                                                                                                 |
| <b>Returns</b>            | The full path to the iServer working directory.                                                                                                               |
| <b>JavaScript example</b> | <code>reportContext.getAppContext().get("ServerContext").getServerWorkingDirectory();</code>                                                                  |
| <b>Java example</b>       | <pre>IServerContext scontext; scontext = (IServerContext)     reportContext.getAppContext().get("ServerContext"); scontext.getServerWorkingDirectory();</pre> |

---

## getUserAgentString( )

Identifies the browser used to view a report.

|                           |                                                                                                                                                                                                                                                      |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>JavaScript syntax</b>  | <code>getUserAgentString()</code>                                                                                                                                                                                                                    |
| <b>Java syntax</b>        | <code>public String getUserAgentString()</code>                                                                                                                                                                                                      |
| <b>Usage</b>              | Use in cases when an application requires different code for different browsers. The browser information is available only when the report is rendered, so use <code>getUserAgentString( )</code> in a report element's <code>onRender</code> event. |
| <b>Returns</b>            | <p>The browser type in String format. For Internet Explorer, for example, <code>getUserAgentString( )</code> might return a string, such as:</p> <pre>Mozilla/4.0 (compatible; MSIE 7.0; Windows NT 5.1; InfoPath.1; MS-RTC LM 8)</pre>              |
| <b>JavaScript example</b> | <code>reportContext.getAppContext().get("ServerContext").getUserAgentString();</code>                                                                                                                                                                |

**Java example** `IServerContext scontext;  
scontext = (IServerContext)  
reportContext.getAppContext().get("ServerContext");  
scontext.getUserAgentString();`

---

## getUserRoles( )

Retrieves the roles assigned to the current user.

**JavaScript syntax** `getUserRoles()`

**Java syntax** `public List<String> getUserRoles()`

**Usage** Use in cases when an application requires different code for different iServer security roles.

**Returns** The current user's security roles.

**JavaScript example** `reportContext.getAppContext().get("ServerContext")  
.getUserRoles();`

**Java example** `IServerContext scontext;  
scontext = (IServerContext)  
reportContext.getAppContext().get("ServerContext");  
List<String> userRoles = scontext.getUserRoles();`

---

## getVolumeName( )

Retrieves the name of the iServer volume on which the report runs.

**JavaScript syntax** `getVolumeName()`

**Java syntax** `public String getVolumeName()`

**Usage** Use in cases when an application running in a multi-volume environment requires volume information, for example, to implement logging in a report.

**Returns** The name of the iServer volume running a report.

**JavaScript example** `reportContext.getAppContext().get("ServerContext")  
.getVolumeName();`

**Java example** `IServerContext scontext;  
scontext = (IServerContext)  
reportContext.getAppContext().get("ServerContext");  
scontext.getVolumeName();`







# Performing impact analysis

This chapter contains the following topics:

- About impact analysis
- Searching for database items used in BIRT objects
- Identifying the files impacted by a BIRT object
- Viewing the relationships among files in a project
- Assessing the impact of changes in an Actuate BIRT iServer volume

---

## About impact analysis

In an enterprise reporting system, data requirements frequently change, and BIRT data sources must be updated accordingly. For example, columns in a database table can be renamed or deleted, or their data type changed. These changes require updates to the data objects or information objects that retrieve data from the affected columns. Changes in a data object or information object, in turn, impact the reports and dashboards that derive their data from those data sources.

Actuate BIRT Designer provides tools for assessing the impact of changes in a database and in BIRT objects. Using these tools, you can:

- Search for a specific column used by files in a workspace or a specific project
- Identify the files that are impacted by a specific file
- View the relationships among files in a project

Through impact analysis, you can more easily manage changes in your environment.

---

## Searching for database items used in BIRT objects

You can identify the files impacted by a change in a database schema by searching for a specific table or column in a workspace or a project. The search tool finds and lists all the files—data objects, information objects, libraries, and report designs—that access data from the specified table or column.

### How to search for files that use a specific database, table, or column

- 1 From the main menu, choose Search→Database.
- 2 In Search—Database Search:
  - 1 Specify the host name of the database to search, using one of the following methods:
    - ❑ In Databases, select an item from the list of database host names and types. The list shows only database hosts found in the current project, regardless of the scope of the search.
    - ❑ In Search for database host name or select from the list below, type the name of the database host.
  - 2 Optionally, after the database host name, type a table name and a column name. Type a colon (:) to separate each item, as shown in the following examples:

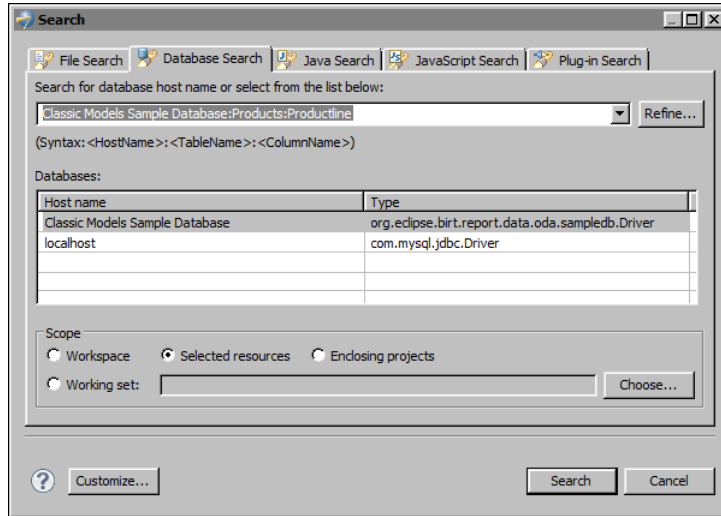
Classic Models Sample Database:Products

Classic Models Sample Database:Products:Productline

You can choose Refine to search for and select a table or a column. The Refine dialog box, however, lists only the tables and columns used by files in the current project.

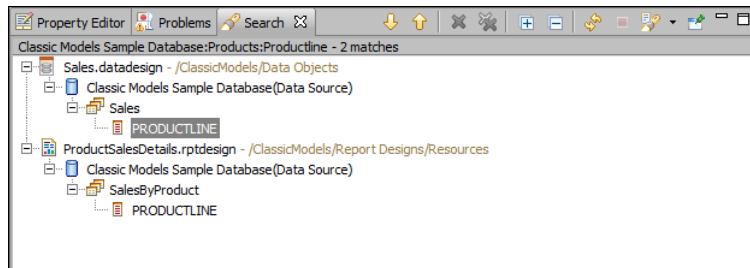
- 3 In Scope, select the scope of the search. You can search the entire workspace, the resources selected in Navigator, the projects that enclose the selected resources, or predefined working sets.

Figure 25-1 shows an example of searching for the Productline column in the Products table in the Classic Models sample database.



**Figure 25-1** Database search example

- 4 Choose Search. The search results appear in the Search view, as shown in Figure 25-2. Search displays all the files that use the specified column and the file locations. For each file, Search identifies the data set in which the column is defined.



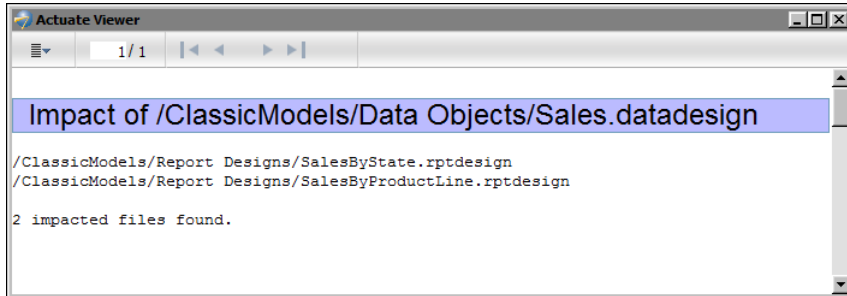
**Figure 25-2** Database search results

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## Identifying the files impacted by a BIRT object

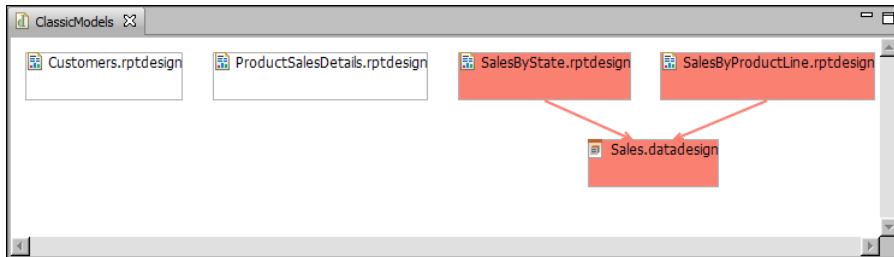
Use one of the following ways to assess the impact of changing a BIRT object:

- Generate an impact report, which lists the files that are affected by a selected object. To generate this report, in Navigator, right-click the object, then choose Generate Impact Report. Figure 25-3 shows an example of an impact report generated for a data object, Sales.datadesign. This impact report lists two reports that use the data object.



**Figure 25-3** Impact report generated for Sales.datadesign

- Generate a project model diagram, which provides a graphical view of all the BIRT files in the project, and highlight a specific file and the files that depend on it, as shown in Figure 25-4. To display this diagram, right-click the file and choose Show Impact.

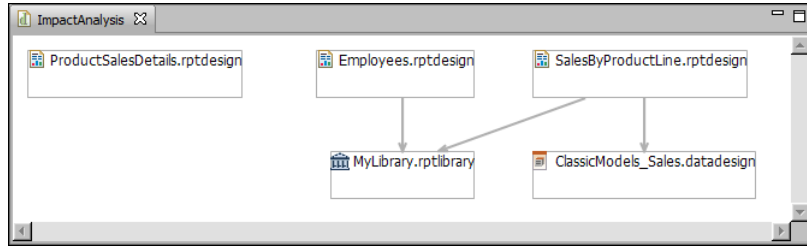


**Figure 25-4** Highlighted graphical view of Sales.datadesign and the reports that use it

---

## Viewing the relationships among files in a project

In Navigator, right-click the project, and choose Show Relationship Overview. The report editor displays a project model diagram, as shown in Figure 25-5. The diagram shows all the BIRT files in the project, and the relationships among them.



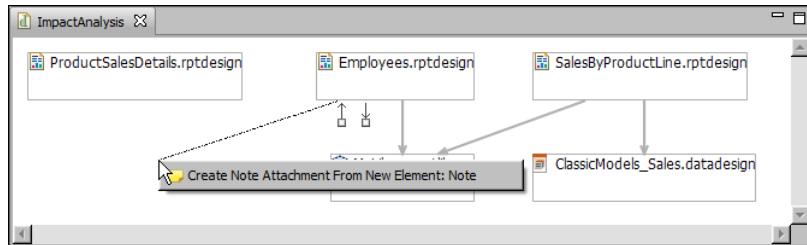
**Figure 25-5** Project model diagram

The diagram in Figure 25-5 shows the following files and relationships:

- ProductSalesDetails.rptdesign does not depend on any files.
- Employee.rptdesign depends on MyLibrary.rptlibrary.
- SalesByProductLine.rptdesign depends on MyLibrary.rptlibrary and ClassicModels\_Sales.datadesign.

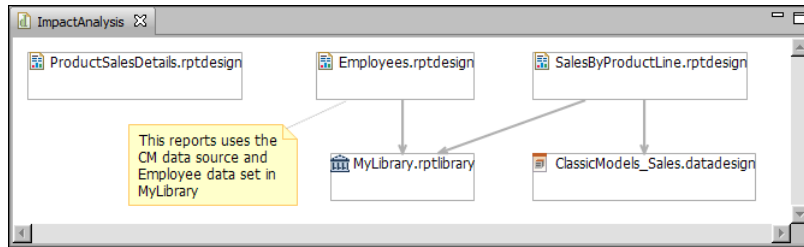
You can zoom the diagram, print it, or save it as an image. Right-click in an empty space in the diagram to access these options. You can edit the layout of the diagram by moving objects.

You can also add notes to any item in the diagram. For example, if a report depends on a library, it would be useful to list the specific element or elements in the library that the report uses. Hover the mouse pointer over the item. When you see two arrows with boxes, as shown in Figure 25-6, click one of the arrows and drag the line to an area in which to create a note. When you release the mouse button, a Create Note Attachment button appears. Click it to create a note.



**Figure 25-6** Creating a note in the project model diagram

Figure 25-7 shows a note created for Employees.rptdesign. If you add notes, save the diagram as an image file or print it. The notes are lost when you close the view or regenerate the diagram.



**Figure 25-7** Note added to the project model diagram



The impact-analysis tools can be used in a BIRT project only. They are not available in other types of projects, such as Java or plug-in projects. In Navigator, a BIRT project is identified with a B symbol in the corner of the project icon.

Furthermore, the project model diagram and impact report show the file dependencies between BIRT files only, such as data objects, information objects, libraries, and reports. Non-BIRT files, such as JAR, CSS, and image files, that reports might use are not included in the project model diagram or impact report.

## Assessing the impact of changes in an Actuate BIRT iServer volume

Impact-analysis tools are available in Actuate BIRT Designer only. To identify file dependencies in an iServer volume, download the volume contents to a BIRT project in Actuate BIRT Designer, then run the impact-analysis commands on the project, as described in the previous sections.

You can download content from the entire volume or from specific folders. But, first, you must create an iServer profile, which stores the properties to connect to a specific volume.

### How to create a new iServer profile

- 1 Select iServer Explorer. If you do not see this view, choose Window→Show View→iServer Explorer.
- 2 Right-click Servers, and choose New iServer Profile.
- 3 In New iServer Profile, specify the connection information.
  - 1 In Profile type, select iServer.
  - 2 In Profile name, type a unique name that identifies the new profile. Using the volume name is a good way to identify the volume to which this profile connects.
  - 3 In iServer, type the name or IP address of the iServer.
  - 4 In Port number, type the number of the port to access iServer.



- 5 In Volume, select the iServer Encyclopedia volume.
- 6 In User name, type the user name required to access the volume.
- 7 In Password, type the password required to access the volume.
- 8 To save the password with the profile, select Remember Password.

Figure 25-8 shows an example of connection properties specified for an iServer volume named Athena.

**Figure 25-8** Properties of an iServer profile

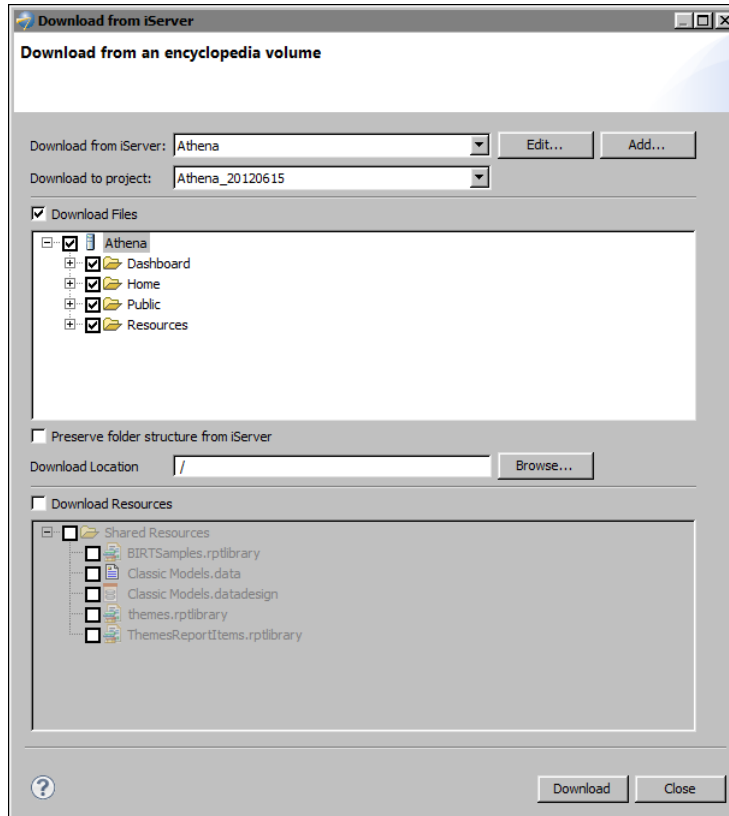
- 4 Choose Finish. The iServer profile appears in iServer Explorer. Expand the profile to display the contents of the volume.

#### **How to download content from an iServer volume**

- 1 Choose File→Download→Download from iServer. If this menu item is unavailable, select Navigator.
- 2 In Download from iServer, specify the following information:
  - 1 In Download from iServer, select the profile of the iServer volume from which to download content.
  - 2 In Download to project, select a BIRT project to which to download the volume content.
  - 3 In Download Files, select the files to download. Select the volume to download all content, or select specific folders and files.

- 4 In Download Location, choose Browse to select a folder within the BIRT project in which to download the files.

Figure 25-9 shows an example of properties specified for downloading an entire volume named Athena. The files are downloaded to the root folder of the project, Athena\_20120615.

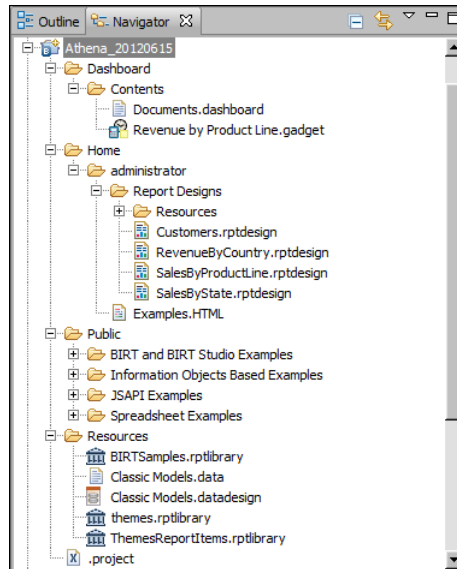


**Figure 25-9** Properties specified for an iServer volume download

- 5 Choose Download. Actuate BIRT Designer downloads the selected volume files to the specified project folder.

Figure 25-10 shows an example of files downloaded to the project folder, Athena\_20120615.

You can now run the impact-analysis commands on the project, or on specific files in the project.



**Figure 25-10** Navigator displaying the downloaded iServer files in the Athena\_20120615 project



# Part Three

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**Deploying reports and resources**



# Deploying BIRT reports to iServer

This chapter contains the following topics:

- About deploying BIRT reports
- Publishing a report resource to iServer
- Deploying Java classes used in BIRT reports
- Installing a custom JDBC driver
- Installing custom ODA drivers and custom plug-ins

---

## About deploying BIRT reports

This chapter describes how to run and distribute BIRT reports in the Actuate business reporting system. To deploy BIRT reports, you need to understand the environment in which the reports run.

iServer provides a central location from which business users can access, run, and view reports. You can also use Actuate Information Console to run report executables, and to manage, generate, view, and print report documents.

Actuate BIRT Designer Professional, the tool that you use to develop BIRT reports, has built-in capabilities that facilitate the deployment process. The Actuate BIRT Designer integrates with iServer in several important ways to support performing the following tasks:

- Use an open data access (ODA) information object data source that resides on an Encyclopedia volume.
- Publish a report design to an Encyclopedia volume.
- Publish a resource to an Encyclopedia volume.
- Install a custom JDBC driver for use by BIRT reports running in the iServer environment.

A user accesses BIRT Studio from Actuate Information Console. BIRT Studio is a licensed option of iServer. To deploy templates and reports to BIRT Studio you use the deployment features available in Actuate BIRT Designer Professional. The following sections describe these capabilities.

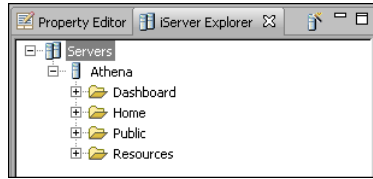
---

## Publishing a report to iServer

The purpose of publishing a report to iServer is to make it accessible to a large number of users. A published report is available to manage, meaning you can schedule re-running the report to include updates from the data sources. You can also choose who can access part or all of the report.

Actuate BIRT Designer Professional provides tools for easy deployment of reports, templates and their resources to iServer. The designer connects directly to an iServer and deploys the reports to selected iServer folders. The designer provides an iServer Explorer view for managing iServer connections. Using iServer Explorer, you can create iServer connection profiles to store the connection properties to a specific Encyclopedia volume. Figure 26-1 shows iServer Explorer displaying an iServer profile.

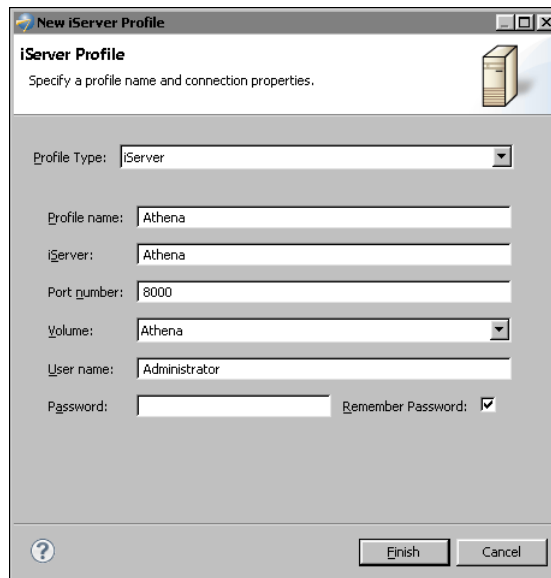




**Figure 26-1** iServer Explorer view

### How to create a new iServer profile

- 1 In Actuate BIRT Designer, open iServer Explorer. If you do not see the iServer Explorer view in the designer, select **Windows**→**Show view**→**iServer Explorer**.
- 2 In iServer Explorer, right-click **Servers**, and choose **New iServer Profile**.
- 3 In **New iServer Profile**, specify the connection information. Figure 26-2 displays an example of connection properties provided for an iServer named **Athena**.



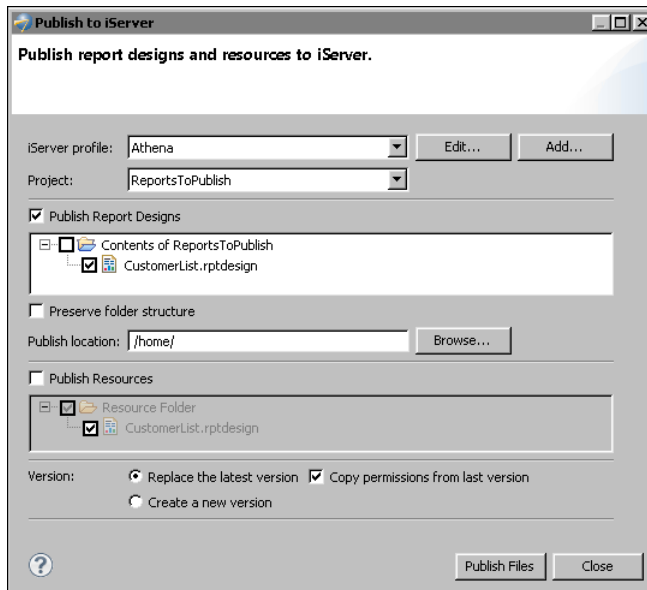
**Figure 26-2** Setting properties in a new iServer profile

- 1 In **Profile type**, select **iServer**.
- 2 In **Profile name**, type a unique name that identifies the new profile.
- 3 In **iServer**, type the name or IP address of the iServer.
- 4 In **Port number**, type the number of the port to access iServer.
- 5 In **Volume**, select the iServer Encyclopedia volume.

- 6 In User name, type the user name required to access the volume.
- 7 In Password, type the password required to access the volume.
- 8 Select Remember Password, if you want to save the password.
- 4 Choose Finish to save the iServer profile. The iServer profile appears in the iServer Explorer as shown in Figure 26-1.

#### How to publish a report design to iServer

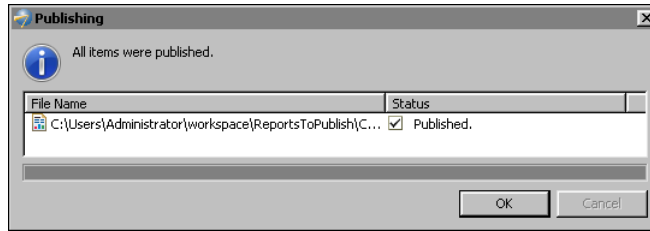
- 1 Choose File>Publish>Publish to iServer.
- 2 On Publish to iServer, select a server profile. If there is no appropriate profile in the iServer profile list, create a new profile by choosing Add. In New iServer Profile, complete the information in the New iServer Profile, as shown in Figure 26-2. Then, choose Close.
- 3 Select the project where the report you want to publish is located.
- 4 Select Publish Report Designs.
- 5 On Publish to iServer, select the report, as shown in Figure 26-3.
- 6 In Publish location, type or browse for the location on the Encyclopedia volume in which to publish the report design, as shown in Figure 26-3.



**Figure 26-3** Selecting a server and location

- 7 Choose Publish Files. A window showing the file upload status appears.

In Publishing, wait until the upload finishes, then choose OK, as shown in Figure 26-4.



**Figure 26-4** Confirming the report publishing

8 In Publish Report Designs, choose Close.

---

## Publishing a report resource to iServer

BIRT reports frequently use files with additional information to present report data to the users. A BIRT resource is any of the following items:

- Static image that a BIRT report design uses
- Report library
- Properties file
- Report template
- Data object
- CSS file
- External JavaScript file
- SWF file of a Flash object
- Java event handler class packaged as a Java archive (JAR) file

You can publish BIRT resources from the BIRT Report Designer's local resource folder to iServer. By default, the Resource folder is the current report project folder. If you use shared resources with other developers and the resource files for your reports are stored in a different folder, you can change the default Resource folder. Use Windows→Preferences→Report Design→Resource menu to set the resource folder.

In the Encyclopedia volume, the Resource folder is set to /Resources by default. In the sample Encyclopedia volume, the /Public folder contains sample reports. The libraries and templates used by these sample reports are stored in the /Resources folder.

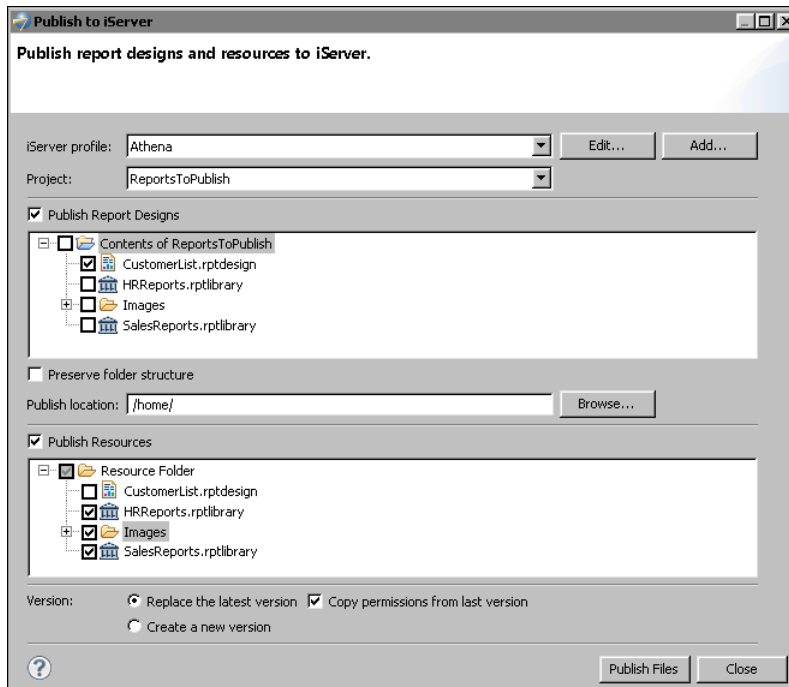
If the resource folder in the Encyclopedia volume is different from the default, before publishing a resource, you need to set up the Resource folder in the Encyclopedia volume.

### How to change the Resource folder on an Encyclopedia volume

- 1 Open Management Console and log in to the Encyclopedia volume.
- 2 Create a folder to designate as a resource folder.
- 3 Choose Volume→Properties.
- 4 On Properties→General, in Resource folder, type or browse to the folder to which you want to publish BIRT resources. Choose OK.

### How to publish a resource from the Resource folder to iServer

- 1 In Actuate BIRT Designer, choose File→Publish→Publish to iServer.
- 2 Select the iServer profile, as shown in Figure 26-5.
- 3 On Publish to iServer, you can publish reports and resources. Choose Publish Resources.
- 4 On Publish to iServer, expand the Actuate BIRT Designer's Resource Folder and select the resources to publish.



**Figure 26-5** Publish Resources dialog

- 5 Choose Publish Files. A new window showing the file upload status appears.
- 6 Choose OK when the upload finishes.
- 7 In Publish to iServer, choose Close.

---

## Deploying Java classes used in BIRT reports

A BIRT report uses scripts to implement custom functionality. For example, you can use scripts to create a scripted data set or to provide custom processing for a report element. When you deploy a BIRT report to an Encyclopedia volume, you must provide iServer with access to the Java classes that the scripts reference. You package these classes as JAR files that can be recognized and processed from an iServer Java factory process. There are two ways to deploy Java classes:

- Deploy the JAR files to the Encyclopedia volume.

This method supports creating specific implementations for each volume in iServer. This method of deployment requires packaging the Java classes as a JAR file and attaching the JAR file as a resource to the report design file. You treat a JAR file as a resource in the same way as a library or image. Using this method, you publish the JAR file to iServer every time you make a change in the Java classes.

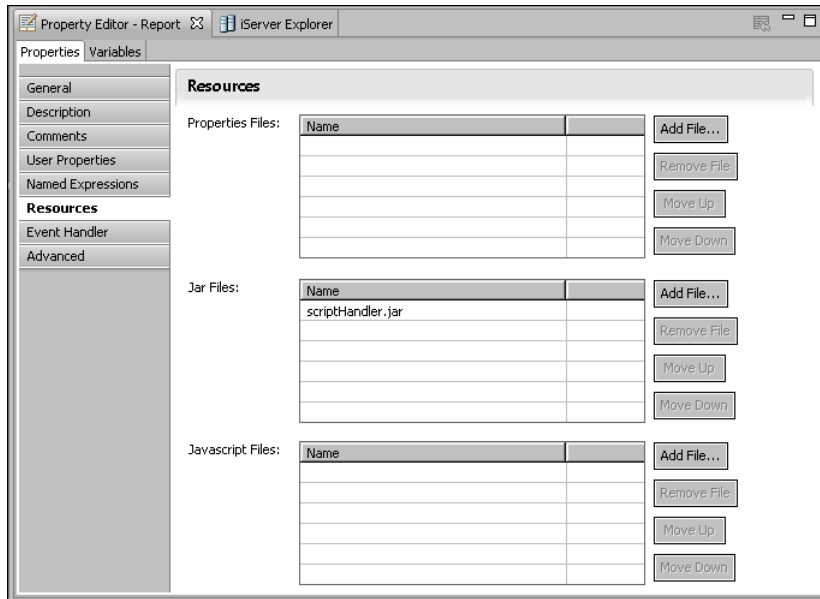
- Deploy the JAR files to the following iServer subdirectory:

`$ACTUATE_HOME\iServer\resources`

This method uses the same implementation for all volumes in iServer. Actuate does not recommend deploying JAR files to an iServer /resources folder because iServer must be restarted after deploying the JAR file. Another disadvantage of this deployment technique is that the JAR file, deployed in the iServer /resources directory is shared across all volumes, which can cause conflicts if you need to have different implementations for different volumes. When using this method, you do not have to add the JAR file to the report design's Resource property.

### How to configure BIRT reports and deploy a JAR file to an Encyclopedia volume

- 1 Package the Java classes as a JAR file and copy the JAR file to the Actuate BIRT Designer resource folder.
- 2 Open the report design in Actuate BIRT Designer.
- 3 In Outline, select the root report design slot and select Resources property group in the Property Editor window.
- 4 In Resources, in JAR files, choose Add and navigate through the Resource folder to select the JAR file, as shown on Figure 26-6.



**Figure 26-6** Add JAR file as a resource to a report

When the report executes, the engine searches for the required classes and methods only in this JAR file.

- 5 Choose File ➤ Publish ➤ Publish to iServer to publish the report and the JAR file to the iServer.
  - 1 Select the server profile.
  - 2 Select Publish Report Designs, choose the report, and the folder on iServer where you want to copy the report.
  - 3 Select Publish Resources and choose the JAR file. The JAR file is stored in the Encyclopedia volume's Resource folder.
- 6 Run the report from Information Console or Management Console.

#### How to deploy a JAR file to an iServer /resources folder

- 1 Copy the JAR file to the following iServer subdirectory:

`$ACTUATE_HOME\iServer\resources`

`$ACTUATE_HOME` is the folder where Actuate products install. By default, it is `C:\Program Files\Actuate11` for version 11.

- 2 Publish the report to iServer as described in "Publishing a report to iServer," earlier in this chapter.

- 3 Restart iServer.
- 4 Run the report from Information Console or Management Console.

---

## Installing a custom JDBC driver

In order to run a BIRT application in the iServer environment when the BIRT application uses a custom JDBC driver, you must install the JDBC driver in the following location:

```
$ACTUATE_HOME\iServer\Jar\BIRT\platform\plugins
 \org.eclipse.birt.report.data.oda.jdbc_<VERSION>\drivers
```

---

## Installing custom ODA drivers and custom plug-ins

All custom ODA drivers and custom plug-ins must be installed in the following folder:

```
$ACTUATE_HOME\iServer\MyClasses\eclipse\plugins
```

By default, Actuate iServer and Information Console load custom plug-ins from this folder. If your application uses a different location to store custom plug-ins, you must set this location in each product's link file. Actuate products use link files to locate folders where the custom plug-ins are deployed. The name of the link files are customPlugins.link and customODA.link. As the file names suggest, the customODA.link file stores the path for custom ODA drivers, and customPlugins.link is for all plug-ins used by BIRT reports and the BIRT engine, such as custom emitters, or Flash object library plug-ins. Typically, the link files are stored in a \links subfolder of the Eclipse instance of the product. For Actuate BIRT Designer, for example, the file is located in:

```
$ACTUATE_HOME\BRDPro\eclipse\links
```

You can change the path in customPlugins.link file and deploy the plug-ins to the new location.

When you install the InformationConsole.war file to your own J2EE application server, the shared folder MyClasses is not available. In this case, custom plug-ins should be copied to this folder:

```
WEB-INF/platform/dropins/eclipse/plugins
```

The locations of the link files for each product are listed in Table 26-1.

**Table 26-1** .link files locations

| <b>Product</b>                     | <b>Paths of .link files</b>                    |
|------------------------------------|------------------------------------------------|
| Actuate BIRT Designer Professional | \$ACTUATE_HOME\BRDPro\eclipse\links            |
| Actuate iServer                    | \$ACTUATE_HOME\iServer\Jar\BIRT\platform\links |
| Information Console                | WEB-INF/platform/dropins/eclipse/plugins       |



# Configuring data source connections in iServer

This chapter contains the following topics:

- About data source connection properties
- Using a connection profile
- Using a connection configuration file
- Accessing BIRT report design and BIRT resource path in custom ODA plug-ins

---

## About data source connection properties

Every BIRT data source object specifies the connection properties required to connect to an underlying data source. Typically, many report designs access the same data source. Rather than typing the same connection properties for each design, you can create a connection profile to reuse the same connection properties across multiple designs. Usually you change database connection properties used in the development environment when you publish the reports to Actuate BIRT iServer.

To change the connection properties dynamically when you design or deploy your reports, you can use one of two approaches, connection configuration file or connection profile. The connection profile approach is the recommended method of managing database connections. The following sections describe these two approaches.

---

## Using a connection profile

The connection profile includes information about the database driver, a user ID, password, port, host, and other properties related to the type of data source. BIRT supports using a connection profile when creating a data source in a report design. When a connection profile changes, the BIRT report picks up those changes. This behavior makes migration from a test to a production environment straightforward.

You can use connection profiles for all data source types, except SQL Query Builder data sources. If you have to use connection profiles for this type of data source, you must define a unique connection profile in each report.

### Creating a connection profile

There are two ways to create a connection profile in BIRT Report Designer Professional. You can create a connection profile in Data Explorer, when you create a data source, or in Data Source Explorer view. You use Data Source Explorer to modify, import and export connection profiles.

Connection profiles are stored in text files called connection profile stores. Connection profile stores can contain multiple connection definitions for various ODA data sources. The default connection profile store is `ServerProfiles.dat`, located in the `.metadata` folder in your workspace.

You can also define your own connection profile store, and choose an absolute or a relative file path to store it. It is a good practice to create and use your own profile store file, instead of the default store. Using the default store requires

using absolute file paths for a profile location and involves additional procedures of exporting a profile.

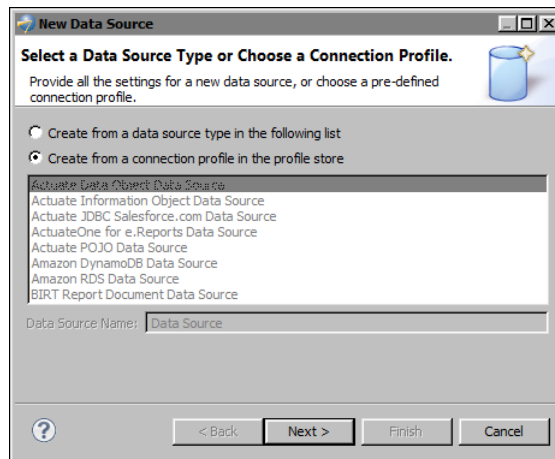
Using the Data Source Explorer to create a connection profile limits the connection profile location definition to an absolute file path only, while Data Explorer allows a relative and absolute file path definition. When using a relative file path, the Resource folders in the designer and iServer are used as the base folders. At design time, the BIRT Resource folder points to either the project root or an item in the workspace or a folder on the file system. This setting is available under Report Design->Resources node in the Preferences view. At runtime, the BIRT Resource folder points to the Resource folder on the iServer.

Like other BIRT resource files, you must deploy the connection profile store to the iServer when you deploy the report that uses it. By default, BIRT Designer deploys relative path connection profiles to the iServer resource folder.

The connection profile store file can be encrypted using BIRT secured encryption framework. The default extension for the connection profile is .acconnprofiles. This extension is tightly integrated with the default out-of-the-box encryption.

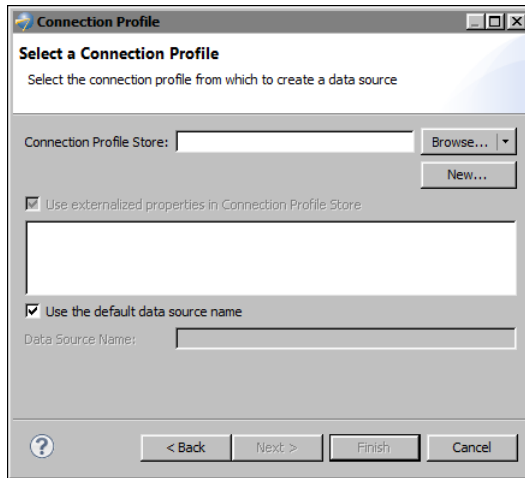
### How to create a connection profile using Data Explorer

- 1 In Data Explorer, right-click Data Sources, and choose New Data Source.
- 2 In New Data Source, choose Create from a connection profile in the profile store, as shown in Figure 27-1.



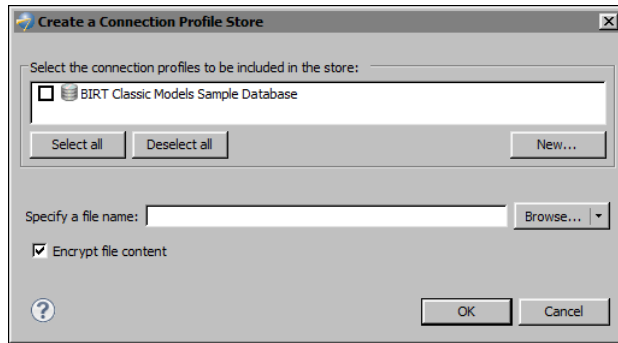
**Figure 27-1** Create a new data source

- 3 Choose Next. Connection Profile appears, as shown in Figure 27-2.



**Figure 27-2** Connection Profile

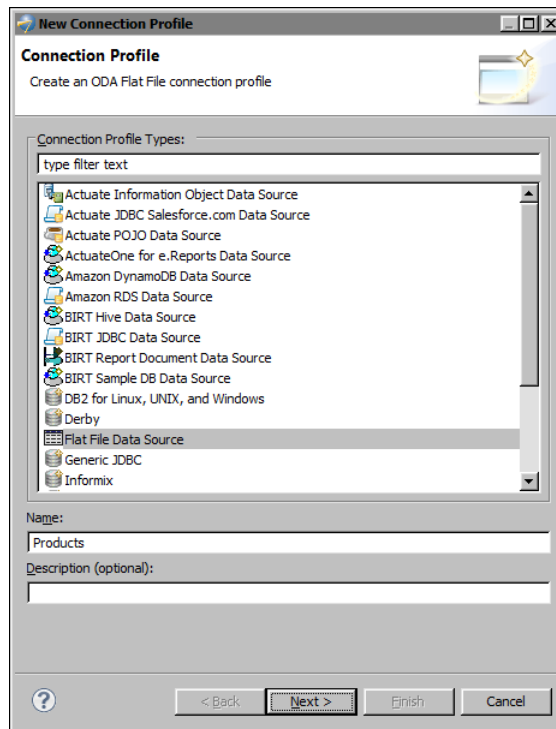
- 4 In Connection Profile, perform one of the following steps:
  - To use an existing profile store, choose Browse.
    - 1 In Browse, narrow down your selection by choosing Relative Path, or Absolute Path for the connection profile store. Relative Path lists all the connection profile stores in the Resources folder. Absolute Path opens a browser window to the file system.  
  
Selecting a connection profile store displays the connection profile store content in the text box below Use externalized properties in Connection Profile Store.
    - 2 Select Use externalized properties in Connection Profile Store to maintain the link to the profile instance in the external profile store file. It is enabled by default. Disabling removes the external reference link, and copies the properties from the selected profile to the data source local properties.
    - 3 Deselect Use the default data source name, if you wish to specify a data source name different from the default.
  - To create a new connection profile store, choose New. Create Connection Profile Store appears, as shown in Figure 27-3.



**Figure 27-3** Create a connection profile store

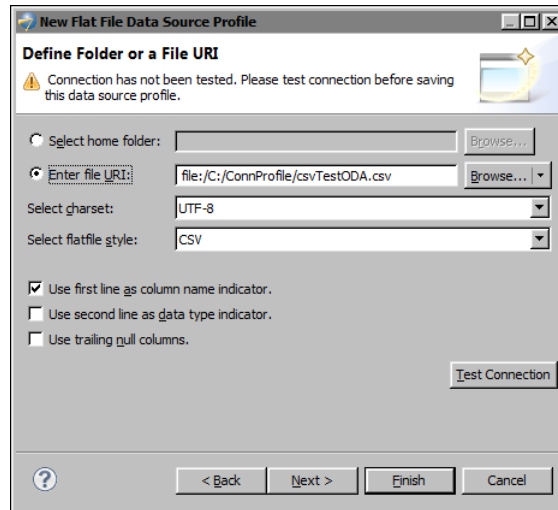
- 1 In Create Connection Profile Store, select an existing profile from the list or choose New to create a new connection profile.

New Connection Profile appears, as shown in Figure 27-4, and lists the data source types for which you can create connection profiles.



**Figure 27-4** New Connection Profile

- 2 Choose a data source type and specify a name of the new connection profile. In this example, as shown in Figure 27-4, Flat File Data Source type is selected.
- 3 Choose Next. A new window for defining the data source properties appears.
- 4 Specify the required information to connect to the data source. For a flat file data source, as shown in Figure 27-5, you must enter:
  - ❑ flat file home folder, or file URI
  - ❑ flat file character set format
  - ❑ flat file style
  - ❑ file format details, such as Use first line as column name indicator, Use second line as data type indicator, and Use trailing null columns.

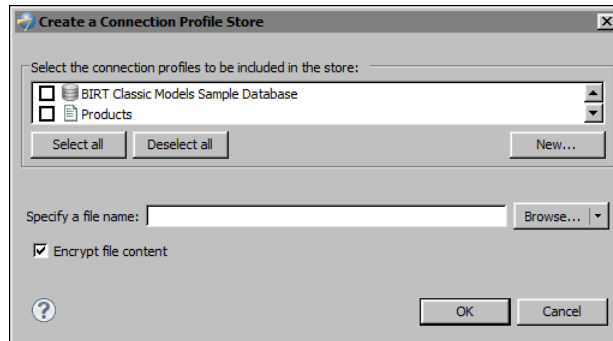


**Figure 27-5** Defining a folder for a flat file data source profile

The connection properties are the same as the properties displayed by the data source wizard.

- 5 Select Test Connection to verify the connectivity.
- 6 Choose Finish.

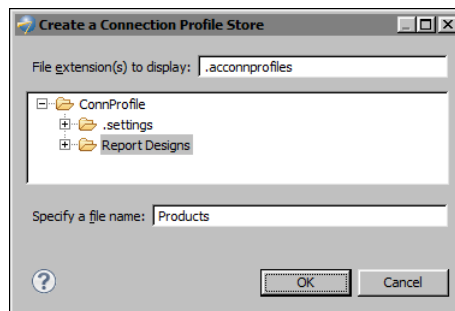
The new connection profile appears in the list of connection profiles, as shown in Figure 27-6.



**Figure 27-6** Selecting a connection profile

- 7 In Create a Connection Profile Store, select the connection profile, Products.
- 8 Specify a file name for the store file.
- 9 Choose Browse to select a location for the profile store, or choose the arrow icon next to Browse, and choose Relative Path or Absolute Path. By default, profile store files are saved in a relative file path. Try to use a relative path, unless your implementation requires an absolute path.

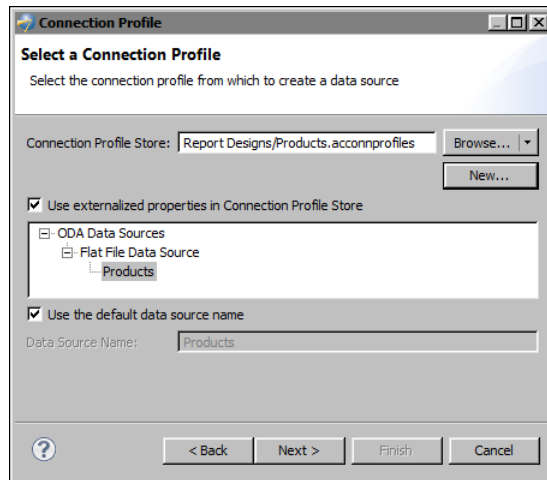
The relative path selection brings up a window like the one in Figure 27-7. The default file extension is .aconnprofiles and the displayed location is the Resource folder in your workspace.



**Figure 27-7** Specifying a store file name

- 10 Select a folder in the suggested location and specify the file name, if you have not entered it in the previous step. Choose OK.
- 11 Deselect Encrypt file content if you wish not to encrypt. The option to encrypt is default.
- 12 In Create a Connection Profile Store, choose OK.

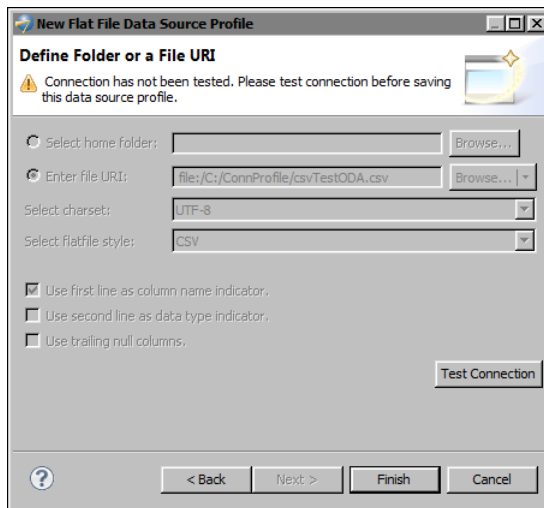
The selected relative path, in this example ReportDesigns /Products.acconnprofiles, appears in Connection Profile Store box as shown in Figure 27-8.



**Figure 27-8** Selecting the store path

13 Choose Next.

- 5 If you see a window, such as the one shown in Figure 27-15, choose Test Connection. If the connection is successful, choose Finish to save the connection profile.



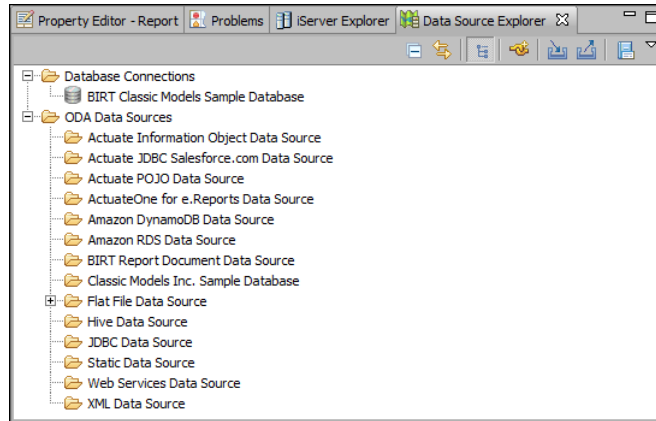
**Figure 27-9** Testing the connection



## How to create a connection profile from Data Source Explorer

- 1 Choose Window→Show View→Other.
- 2 In Show View, expand Data Management and select Data Source Explorer, then choose OK.

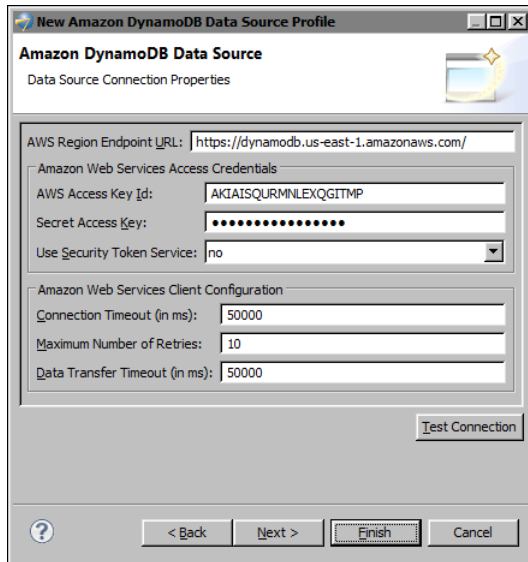
Data Source Explorer lists the data source types for which you can create connection profiles, and any previously defined connection profiles, as shown in Figure 27-10.



**Figure 27-10** Data Source Explorer

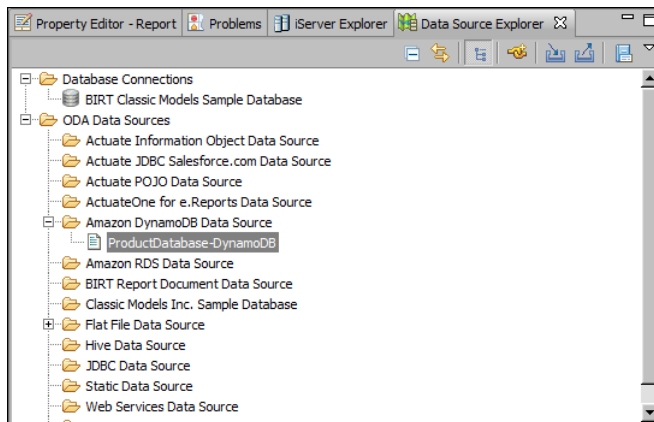
Database Connections supports creating profiles to connect to databases using drivers shipped with Actuate BIRT Designer. These database drivers provide access to the graphical SQL query builder. Creating a database connection profile is equivalent to creating a data source by selecting JDBC Database Connection for Query Builder in the data source wizard. ODA Data Sources supports creating profiles to connect to all the other types of data sources.

- 3 Right-click the data source type for which to create a connection profile. Choose New.
- 4 Specify a name for the connection profile. Use a name that describes the data source, so that you or other report developers can identify it when selecting the profile later.
- 5 Specify the information to connect to the data source. The connection properties are the same as the properties displayed by the data source wizard. Figure 27-11 shows an example of connection properties for Amazon DynamoDB.



**Figure 27-11** Connection properties for Amazon DynamoDB

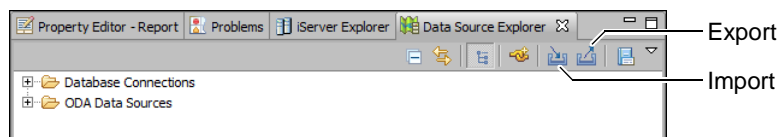
- 6 Choose Test Connection to verify the connection to the data source.
- 7 Choose Finish. The connection profile appears under the data source type in Data Source Explorer. Figure 27-12 shows a connection profile, ProductsDatabase-DynamoDB, under Amazon DynamoDB Data Source.



**Figure 27-12** Data Source Explorer displaying a connection profile for Amazon DynamoDB

## Managing a connection profile

You can create connection profiles for different purposes. Data Source Explorer provides import and export functionality to support multiple connection profiles. This functionality supports creating and maintaining separate profiles with connection properties valid for different environments. Figure 27-13 shows Data Source Explorer, and the Import and Export buttons.



**Figure 27-13** Importing and exporting connection profiles

### Exporting connection profiles

Connection profiles are exported as text files, either plain or encrypted. Use the exported feature to:

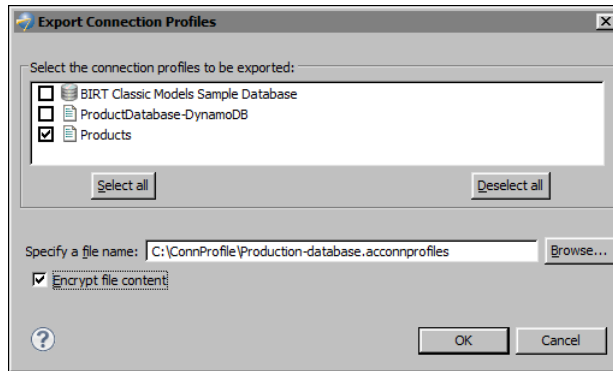
- Move reports from development to production environments.
- Plan to create a new workspace or upgrade to a newer version.
- Reuse existing connection profiles.
- Share a common set of connection profiles across a workgroup.
- Deploy a set of connection profiles to a server environment whose application can work directly with the exported file.

#### How to export a connection profile

- 1 In Data Source Explorer, choose Export.
- 2 Select the connection profiles you want to export, as shown in Figure 27-14.
- 3 Enter a fully qualified path to create a new file, or choose Browse to overwrite an existing file.

Use the default `.acconnprofiles` extension if you plan to encrypt the connection profile and use the default out-of-the-box encryption mechanism for it.

- 4 Deselect Encrypt File Content if the connection profiles do not contain passwords or any other content that pose a security risk.
- 5 Choose OK.

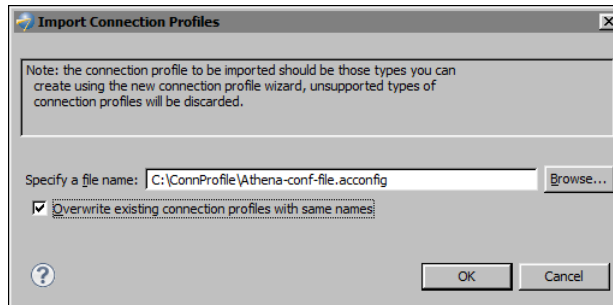


**Figure 27-14** Exporting a connection profile

## Importing connection profiles

You might import a connection profile if you created connection profiles in a previous version of the product and want to reuse them in the current version, or want to share a common set of connection profiles across a workgroup.

Importing connection profiles, as shown in Figure 27-15 involves a profile selection. You can overwrite an existing profile if you choose to.



**Figure 27-15** Importing a connection profile

### How to import a connection profile

- 1 In Data Source Explorer, choose Import.
- 2 Enter the fully qualified path to the connection profile file, or choose Browse.
- 3 Choose Overwrite Existing Connection Profiles with Same Names, if you wish.
- 4 Choose OK.

The connection profile appears under its data source category.

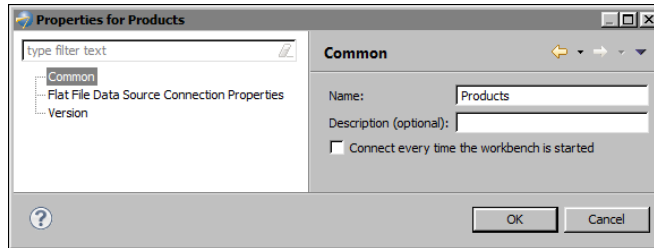
## Editing connection profile properties

You can use Data Source Explorer or Console Editor Application to edit connection profile properties. Console Editor Application works from a command line and is useful in environments where you do not have BIRT Report Designer installed. Use this application for editing connection profile store files.

### How to edit connection profile properties

- 1 Open Data Source Explorer.
- 2 Expand the category for the connection profile that you want to edit.
- 3 Right-click the data source and select Properties.
- 4 Edit the connection profile properties as necessary.

Figure 27-16 shows an example of the properties for a flat file data source.



**Figure 27-16** Modifying connection profile properties

## Editing connection profile store files using Console Editor Application

You can also view and edit connection profile properties in connection profile store files using Console Editor Application, which is an application you can launch outside the Eclipse workbench. Console Editor Application is a system console application to make minor changes to an exported connection profile, such as the file path to the JDBC driver JARs, a connection URL or an ODA data source file path.

When you copy an exported file to a server environment for deployment, you can use this editor tool to quickly adjust the connection profile properties without having to open Data Source Explorer in the Eclipse workbench. The updates are saved in a separate file for all the connection profiles. If the connection profile is deployed on iServer, you must download the profile first, make the changes, and then upload it to iServer again.

Before you can use Console Editor Application, you must install `org.eclipse.datatools.connectivity.console.profile_<version>.jar` in your Eclipse environment, along with the other DTP plug-ins. The plug-in is installed with the BIRT Report Designer Professional installation.

From within your Eclipse home directory, enter the command:

```
eclipse[c] -nosplash -application
org.eclipse.datatools.connectivity.console.profile.
StorageFileEditor

[-? | -in <connectionProfileFile> | -out <saveAsFile> | -profile
 <profileName>]
```

For Windows platforms, indicate eclipssec. For other platforms, use eclipse. The command line options are presented in Table 27-1.

**Table 27-1** Optional command line options

| Option                      | Description                                                                                                                                                                               |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -?                          | Displays help.                                                                                                                                                                            |
| -in <connectionProfileFile> | Enter the name of the connection profile storage file to view and/or change.                                                                                                              |
| -out <saveAsFile>           | Enter the name of the output file to save your changes.                                                                                                                                   |
| -profile <profileName>      | Enter the name of a connection profile to view and/or change. If you do not specify a connection profile name, the Console Editor steps through all the profiles found in the input file. |

If you do not specify an argument value, Console Editor prompts you for an input value.

## Deploying a connection profile

Connection profiles that use relative paths are deployed the same way as report resources, and by default they are saved to the iServer resource folder. For more details on how to publish resources to iServer, see “Publishing a report resource to iServer,” in Chapter 26.

When deploying reports that use absolute connection profiles, you must deploy the connection profile to the correct folder in the file system on the iServer machine. For example, if a report uses a connection profile stored in folder C:\ConnProfile\MySQL.acconnprofiles, you must manually create the same folder C:\ConnProfile on the iServer machine and copy the MySQL.dat file there.

## Encrypting connection profile properties

BIRT supports encrypting the connection profile properties by using the cipherProvider extension point. To define a new encryption method you must extend org.eclipse.datatools.connectivity.cipherProvider extension point.

To define a new encryption plug-in you must define the file extension and its corresponding provider of javax.crypto.Cipher class for the encryption of connection profile store files. Listing 27-1 shows an example of such definition.

- fileExtension – The file extension of connection profile store files that shall be encrypted and decrypted using the cipher provider class specified in the class attribute. The out-of-the-box encryption implementation defines .acconnprofiles as a default extension.

The fileExtension attribute value may include an optional dot (.) before the file extension, for example you can define profiles or .profiles. A keyword default may be specified as an attribute value to match files with no file extension.

- class – The concrete class that implements the org.eclipse.datatools.connectivity.security.ICipherProvider interface to provide the javax.crypto.Cipher instances for the encryption and decryption of connection profile store files. The custom class may optionally extend the org.eclipse.datatools.connectivity.security.CipherProviderBase base class, which reads a secret (symmetric) key specification from a bundled resource. The base implementation class of the org.eclipse.datatools.connectivity.security.ICipherProvider interface is org.eclipse.datatools.connectivity.security.CipherProviderBase. The class uses a default bundled encryption key as its javax.crypto.spec.SecretKeySpec.

The example in Listing 27-1 registers org.company.connectivity.security.ProfileStoreCipherProvider as the provider for files with the extension .profile and for those with no file extension.

### Listing 27-1 Example of javax.crypto.Cipher extension

---

```
<extension
id="org.company.connectivity.security.cipherProvider"
point="org.eclipse.datatools.connectivity.cipherProvider">

 <cipherProvider fileExtension="profile"
class="org.company.connectivity.security.
ProfileStoreCipherProvider">
 </cipherProvider>

 <cipherProvider fileExtension="default"
class="org.company.connectivity.security.
ProfileStoreCipherProvider">
 </cipherProvider>

</extension>
```

Listing 27-2 shows an example implementation of `org.company.connectivity.security.ProfileStoreCipherProvider` class.

**Listing 27-2** `org.eclipse.datatools.connectivity.security.ICipherProvider` interface implementation example

---

```
import org.eclipse.core.runtime.Platform;
import
 org.eclipse.datatools.connectivity.security.CipherProviderBase;
import
 org.eclipse.datatools.connectivity.security.ICipherProvider;
import org.osgi.framework.Bundle;

public class ProfileStoreCipherProvider extends CipherProviderBase
 implements ICipherProvider
{
 /* (non-Javadoc)
 * @see
 * org.eclipse.datatools.connectivity.security.CipherProviderBase#
 * getKeyResource()
 */
 @Override
 protected URL getKeyResource()
 {
 Bundle bundle = Platform.getBundle(
 "org.company.connectivity.security");
 return bundle != null ?
 bundle.getResource("cpkey") : //$NON-NLS-1$
 super.getKeyResource();
 }
}
```

## Binding connection profile properties

There are two connection profile properties, Connection Profile Store URL and Connection Profile Name, that can be bound to report parameters or expressions and updated when the report is generated.

The next section shows how to bind a parameter to change Connection Profile Store URL.

### Binding Connection Profile Store URL property

The Connection Profile Store URL property is the path and name of the connection profile store file that contains the connection profile used in a report. The report developer can use the property binding feature in the BIRT data source editor to assign a dynamic file path or URL to Connection Profile Store URL property. This can be done at report run time without changing the report design



itself. You can create multiple connection profile store files for different purposes and pass them to a report as parameters at run time.

For example, you have two JDBC connection profiles to the same database using different user names and passwords. These profiles are stored in two separate profile store files. At run time, you can select the profile store you want to use to connect to the database.

Connection Profile Store URL property name is `OdaConnProfileStorePath`. You can also use the property binding feature to specify a JavaScript expression for the value of `OdaConnProfileStorePath`. This feature provides the flexibility to define a different root path for different file properties. For example, the JavaScript expression can include a variable to control the root path:

```
config["birt.viewer.working.path"].substring(0,2) +
 "../data/ProfileStore.acconnprofiles"
```

Alternatively, you can use a `reportContext` object to pass session information and build the path expression.

## Binding a connection profile name to a report parameter

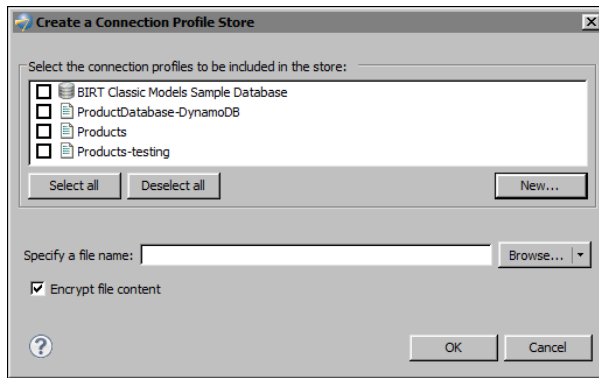
You can also externalize a connection profile name for a data source by binding it to a report parameter. The next example shows how to create a report design that uses a CSV file as a data source, using Actuate BIRT Designer Professional. At design time, the report design uses the CSV file in the folder, `C:\ConnProfile\Testing`. Typically, the design time CSV file contains only a few records. In the production environment, the CSV file, which contains more records, is in the folder, `C:\ConnProfile\Production`. You create two connection profiles, one for the testing database and one for the production database, and pass the name of the connection profile as a parameter at run time. In this way, the report runs as expected in development and production environments.

### How to bind Connection Profile Store URL property to a report parameter

- 1 In BIRT Designer Professional, create a new BIRT report.
- 2 In Data Sources, create a new data source and choose Create from a connection profile in the profile store. Choose Next.
- 3 In Connection Profile, choose New.
- 4 In Create a Connection Profile Store, select New.
- 5 In New Connection Profile, choose Flat File Data Source and enter `Products-testing` as a profile name.
- 6 In Description, type `Testing database`. Choose Next.
- 7 In New Flat File Data Source Profile, choose Enter File URI:, and choose Browse to select the testing database file, which is `C:\ConnProfile\Testing\csvTestODA.csv`, in this example.

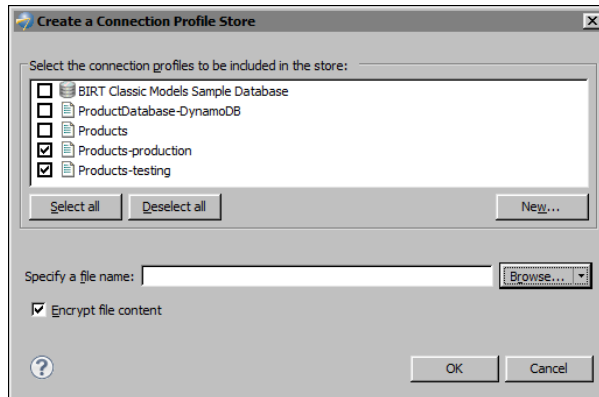
- 8 Choose Test Connection to validate the connection, and select Finish.

Products-testing profile appears in the Create a Connection Profile Store list, as shown in Figure 27-17.



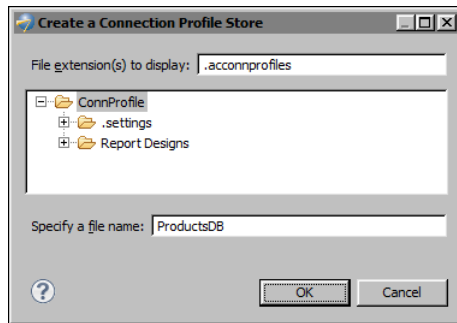
**Figure 27-17** Create a connection profile for testing

- 9 In Create a Connection Profile, choose New to create a connection profile for the production database.
- 10 In New Connection Profile, choose Flat File Data Source and enter Products-Production as a connection profile name.
- 11 Choose Next.
- 12 In New Flat File Data Source Profile, enter the file URI:  
C:\ConnProfile\Production\csvTestODA.csv.
- 13 Select Test Connection to validate the connection.
- 14 Choose Finish.  
Products-production appears in Create a Connection Profile Store list.
- 15 In Select the connection profiles, select Products-testing and Products-production, as shown in Figure 27-18.
- 16 In Specify a file name, choose Browse.  
Create a Connection Profile store appears, showing Resources folder.



**Figure 27-18** Creating a relative path connection profile store

- 17 In Connection Profile Store choose the root project folder, ConnProfile, as shown in Figure 27-19.



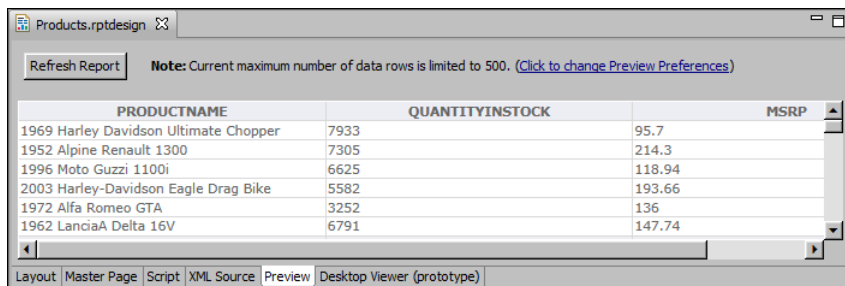
**Figure 27-19** Specifying a store file name and location

- 18 Enter ProductsDB as a file name, and choose OK.
- 19 In Connection Profile Store, choose OK.  
Select Connection Profile appears, as shown in Figure 27-20, prompting you to select a connection profile for the data source.
- 20 In Connection Profile select the testing database connection profile, Products-testing, as shown in Figure 27-20.
- 21 Deselect Use the default data source name and change the data source name to ProductsDB.
- 22 Choose Next.



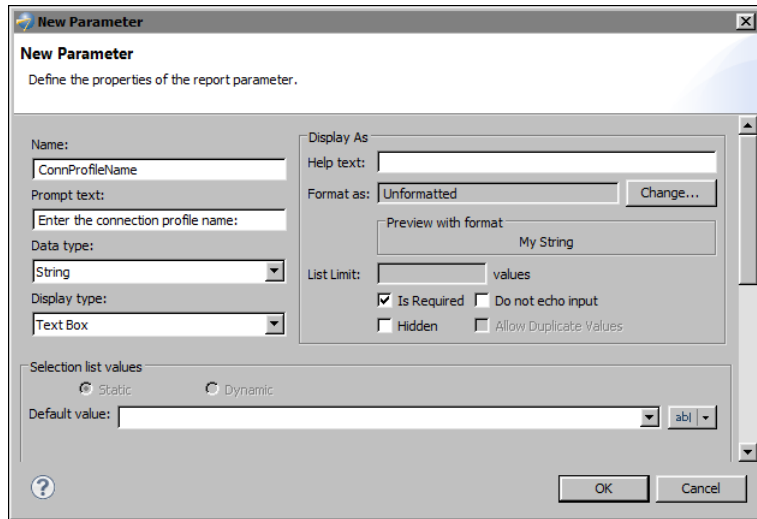
**Figure 27-20** Selecting a connection profile

- 23 Select Test Connection to validate the connection. Choose Finish.  
Products data source appears in Data Explorer.
- 24 In Data Explorer create a new data set named Products from the Products data source.
- 25 Add the Products data set to the layout and preview the report, as shown in Figure 27-21. In the example the report displays only six rows of data.



**Figure 27-21** Previewing the report with testing data

- 26 Select Layout and create a new report parameter in Data Explorer.
- 27 Name the parameter ConnProfileName, as shown in Figure 27-22.
- 28 In Prompt text enter:  
Select the connection profile name:
- 29 Choose OK to create the parameter.



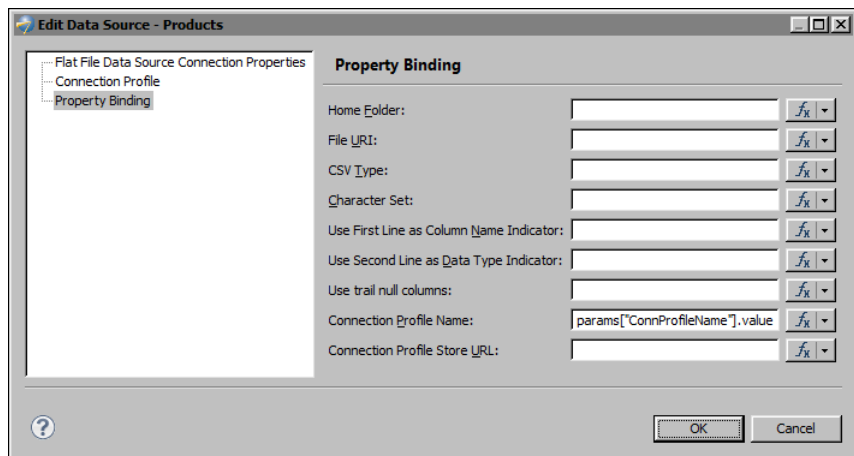
**Figure 27-22** Creating a report parameter

**30** In Data Explorer double-click, Products data set to open the properties.

**31** Choose Property Binding, as shown in Figure 27-23, and enter the expression:

```
params["ConnProfileName"].value
```

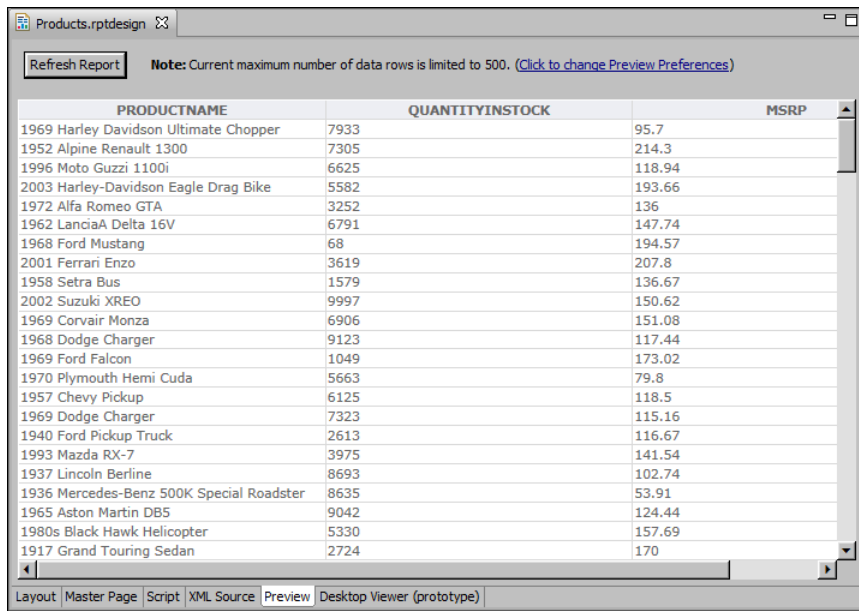
Alternatively, you can select Fx to use Expression Builder to create the expression.



**Figure 27-23** Binding a connection profile name to a report parameter

**32** Choose OK.

- 33** Select Preview. In Parameters, enter Products-production to choose the production database as a data source. The report displays a large set of data, as shown in Figure 27-24.



PRODUCTNAME	QUANTITYINSTOCK	MSRP
1969 Harley Davidson Ultimate Chopper	7933	95.7
1952 Alpine Renault 1300	7305	214.3
1996 Moto Guzzi 1100i	6625	118.94
2003 Harley-Davidson Eagle Drag Bike	5582	193.66
1972 Alfa Romeo GTA	3252	136
1962 LanciaA Delta 16V	6791	147.74
1968 Ford Mustang	68	194.57
2001 Ferrari Enzo	3619	207.8
1958 Setra Bus	1579	136.67
2002 Suzuki XREO	9997	150.62
1969 Corvair Monza	6906	151.08
1968 Dodge Charger	9123	117.44
1969 Ford Falcon	1049	173.02
1970 Plymouth Hemi Cuda	5663	79.8
1957 Chevy Pickup	6125	118.5
1969 Dodge Charger	7323	115.16
1940 Ford Pickup Truck	2613	116.67
1993 Mazda RX-7	3975	141.54
1937 Lincoln Berline	8693	102.74
1936 Mercedes-Benz 500K Special Roadster	8635	53.91
1965 Aston Martin DB5	9042	124.44
1980s Black Hawk Helicopter	5330	157.69
1917 Grand Touring Sedan	2724	170

**Figure 27-24** Previewing the report with the production data

## Using a connection configuration file

A connection configuration file is an XML file that sets the data source connection properties to use when iServer runs a report. Externalizing data source connection information in this file enables an administrator to modify these settings without modifying the report.

iServer expects the configuration file to use UTF8 encoding. You also can use a file that only has ASCII characters. The settings that you use in a connection configuration file override the settings in a report.

### Setting up the connection configuration file

In a BIRT report design, the configuration key that specifies a data source is the concatenation of the ODA plug-in's data source extension ID and the data source design name separated by an underscore (\_) character.

The connection property names are the connection properties defined for your data source. To find the correct names for the connection properties, check the

data source definition in the XML source of the BIRT report design file. You can view the report's XML source by selecting the XML Source tab in the report editor.

The code example in Listing 27-3 shows the XML definition of a MySQL Enterprise database in a report design. Using this data source, the report developer can test the report in development. This XML data source definition specifies the connection properties, `odaDriverClass`, `odaURL`, `odaUser`, and `odaPassword`, for the data source, `ClassicModels`.

**Listing 27-3** The XML definition of a MySQL Enterprise database

---

```
<data-sources>
 <oda-data-source extensionID=
 "org.eclipse.birt.report.data.oda.jdbc" name="Customers"
 id="4">
 <property name="odaDriverClass">
 com.mysql.jdbc.Driver
 </property>
 <property name="odaURL">
 jdbc:mysql://localhost/ClassicModels
 </property>
 <property name="odaUser">root</property>
 <property name="odaPassword">pwd</property>
 </oda-data-source>
</data-sources>
```

At run time, the report uploaded to iServer connects to a production database that resides on a different database server. The connection properties specify a machine IP address, 192.168.218.226, and a different username and password. To externalize the database connection information, create the configuration property file, `DBConfig.xml`, with the settings shown in Listing 27-4.

**Listing 27-4** A configuration property file that connects to a production database

---

```
<Config>
<Runtime>
<ConnectOptions
 Type="org.eclipse.birt.report.data.oda.jdbc_Customers">
 <Property PropName="odaDriverClass">
 com.mysql.jdbc.Driver
 </Property>
 <Property PropName="odaURL">
 jdbc:mysql://192.168.218.226:3306/ClassicModels
 </Property>
 <Property PropName="odaUser">operator</Property>
 <Property PropName="odaPassword">pwd</Property>
```

```
</ConnectOptions>
</Runtime>
</Config>
```

## Understanding how iServer uses the connection configuration file

When the report runs, iServer searches the path in the configuration file parameter for the configuration file that contains the valid ConnectOptions values. The Factory process reads the configuration file containing the ConnectOptions values when the process starts. Factory processes that are running when you change the configuration file do not use the new information. Only Factory processes that start after the configuration file changes use the new information. To ensure that a report executable file uses the updated configuration file information, confirm that no reports are active and stop all currently running Factory processes before you change the configuration file. After you change the file, iServer starts a Factory process for the next report request using these settings.

## Setting the location of a connection configuration file

There is no default location for the connection configuration file. iServer uses the value of the configuration file parameter to locate the connection configuration file.

If you do not specify a value for this parameter, iServer uses the database connection properties in the report executable file. When you set or change the value of the configuration file parameter, you must restart iServer for the change to take effect.

On a Windows operating system, the configuration file parameter can specify a path and file name or a URL. For example:

```
C:\BIRTRptConfig\DBConfig.xml
```

or:

```
http://myserver/configs/testconfig.xml
```

On a UNIX or Linux operating system, the parameter value can only be a path and file name. The parameter value cannot be a URL.

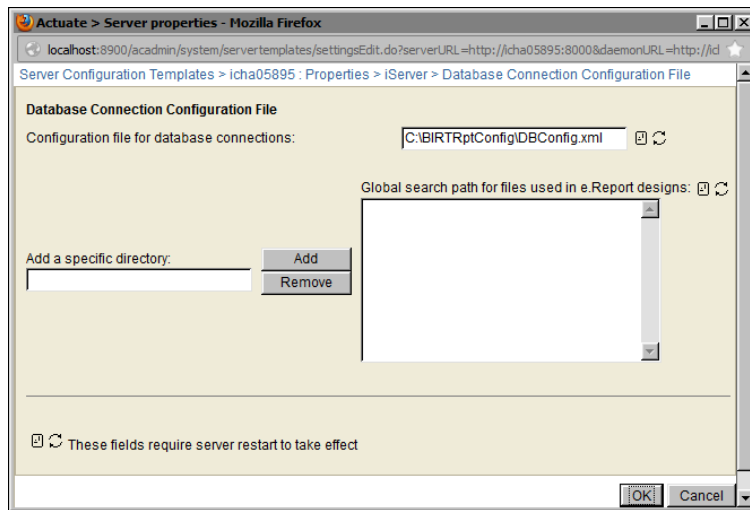
If you have an iServer cluster, each iServer in the cluster must have access to the file. You must use a local absolute path for each machine in the cluster. If you use a single copy of the file for a cluster, put the file in a shared location and set the path to that shared location for all iServers in the cluster.



## How to set up a configuration file in iServer Configuration Console

To set up a connection configuration file, create the file and specify the name and location using the ConnConfigFile parameter in iServer Configuration Console.

- 1 Log in to iServer Configuration Console.
- 2 From the banner, select Advanced view.
- 3 From the side menu, select Server Configuration Templates.
- 4 In Server Configuration Templates, select the name of the template to modify.
- 5 In Properties Settings, select iServer to expand the property list.
- 6 In the iServer property list, choose Database Connection Configuration File.



**Figure 27-25** Specifying the location of a connection file

- 7 In Actuate—Server properties, in Configuration file for database connections, type the configuration file's location, as shown in Figure 27-25.
- 8 Restart iServer.

## Encrypting the connection properties

Actuate BIRT supports the encryption of connection properties in the connection configuration file. The encryption conversion is created in Actuate BIRT Designer, using BIRT's encryption framework. The encryption user interface reads a user-specified configuration file, and writes the encrypted values for a specified property type to a new output file. The configuration file must have the file-name extension, .acconfig.

The run-time decryption processing runs in Actuate BIRT Designer, iServer, and Actuate Java Component. You must deploy the encrypted version of a configuration file to the iServer or Actuate Java Component environments, and set up the database configuration for iServer.

For more information about the BIRT encryption mechanism, see Chapter 29, “Working with BIRT encryption in iServer.”

### How to encrypt a configuration file in BIRT Designer

This procedure assumes you have already created a connection configuration file with an extension of .acconfig. Listing 27-5 shows an example of connection properties specified for Microsoft SQL server. The properties are not encrypted.

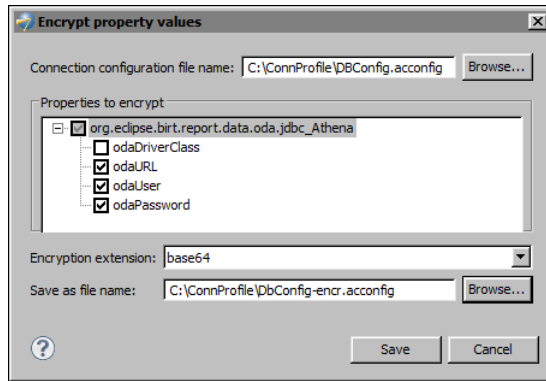
#### Listing 27-5 Connection configuration file

---

```
<?xml version="1.0" encoding="UTF-8"?>
<Config>
 <Runtime>
 <ConnectOptions
 Type='org.eclipse.birt.report.data.oda.jdbc_Athena'>
 <Property PropName='odaDriverClass'>
 com.actuate.jdbc.sqlserver.SQLServerDriver
 </Property>
 <Property PropName='odaURL'>
 jdbc:actuate:sqlserver://
 Athena:1433;databasename=Financials </Property>
 <Property PropName='odaUser'>
 fmanager </Property>
 <Property PropName='odaPassword'>password</Property>
 </ConnectOptions>
 </Runtime>
 </Config>
```

- 1 In Actuate BIRT Designer, choose File—Encrypt Property values from the main menu.
- 2 In Encrypt property values, in Connection configuration file name, choose Browse and select the connection file to encrypt.
- 3 Select the properties to encrypt.
- 4 In Encryption extension, select the encryption algorithm.
- 5 In Save as file name, type or choose Browse to specify the file path and name for the encrypted connection file.

Figure 27-26 shows an example of encryption options specified for a connection configuration file.



**Figure 27-26** Encrypting property values

- 6 Choose Save to encrypt the properties. The encrypted configuration file looks like the one in Listing 27-6.

**Listing 27-6** Encrypted connection configuration file

```
<?xml version="1.0" encoding="UTF-8"?>
<Config>
 <Runtime>
 <ConnectOptions
 Type='org.eclipse.birt.report.data.oda.jdbc_Athena'>
 <Property PropName='odaDriverClass'>
 com.actuate.jdbc.sqlserver.SQLServerDriver
 </Property>
 <Property PropName='odaURL'>
 amRiYzphY3RlYXRlOnNxbHNlcnZlcjov...
 </Property>
 <Property PropName='odaUser'>
 ZmlhbmFnZX...
 </Property>
 <Property PropName='odaPassword'>
 cGFzc3...
 </Property>
 <Property PropName='encryptedPropNames'>
 odaURL|odaUser|odaPassword
 </Property>
 <Property PropName='encryptionExtName'>
 base64
 </Property>
 </ConnectOptions>
 </Runtime>
</Config>
```

The encryption feature encrypts the selected properties and adds two new properties to the connection options. The `encryptedPropNames` property specifies the list of encrypted properties, separated by `|`. The `encryptionExtName` property specifies the encryption algorithm.

## Externalizing the connection profile properties on the iServer

You can use the iServer database connection configuration file to externalize the data source properties for any data source connection property in a BIRT report design. The data source properties are externalized in the connection configuration file that is made accessible to the iServer.

As Connection Profile Store URL is the ODA data source property, `OdaConnProfileStorePath`, the file path to the connection profile can itself be externalized. To externalize Connection Profile Store URL ODA data source property, specify it in the iServer's connection configuration file. When the report is deployed to the iServer and executed, the server reads the connection profile from the file path specified in the iServer database connection configuration file. The file path specified in the report design is ignored.

## Understanding externalization precedence

Data source properties in a report design can be externalized to the connection profile and to the iServer connection configuration file. In addition, Connection Profile Store URL itself can be externalized. The following precedence rules explain how iServer and Information Console determine the final list of data source properties for report execution:

- Information Console – Data source properties in the connection profile override the data source properties in the report design.
- iServer – Data source properties in the iServer connection configuration file override the data source in the connection profile that overrides the data source connection properties in the report. The ascending order of precedence for iServer is as follows:
  - Data source properties in the report design
  - Data source properties in the connection profile
  - Data source properties in the iServer connection configuration file

The following sample connection configuration file externalizes the file path to the connection profile and shows the required structure:

```
<Config>
<Runtime>
<ConnectOptions Type="org.eclipse.birt.report.data.oda.jdbc_SQL
 Server Data Source">
```

```

 <Property PropName="OdaConnProfileStorePath">
 C:\SqlServer.profile
 </Property>
</ConnectOptions>
</Runtime>
</Config>

```

The connection profile referenced by the BIRT report design is read when the report is executed in Information Console and iServer. The path to the connection profile in the design has to be visible to Information Console and iServer applications.

## Referencing an external connection profile

The path to the external connection profile is stored in the BIRT report design. The ODA data source property, `ConnectionProfileStoreURL`, holds this value. The path can be a relative or an absolute file path, or a URL. File paths, whether relative or absolute, must be accessible by the Information Console web application when the report is deployed to Information Console. Similarly, this path must be accessible by the iServer when the report is deployed to the iServer. Actuate does not recommend the use of absolute file paths. Typically, the location of the connection profile in all three environments, Actuate BIRT Designer, Information Console, and iServer, resolves to a different path. Absolute paths have the disadvantage that the absolute path used in the Actuate BIRT Designer environment on Windows will not be available when the report is deployed to Information Console or iServer on UNIX. On UNIX, you can use relative paths with the use of soft links, but these links are not available on Windows.

Using a relative path, you deploy the connection profile to iServer, and this resolves the issue with different environments and not accessible absolute paths.

When the absolute file path to the connection profile is different in the design environment compared to the Information Console and iServer deployment environments, there are some options to avoid having to change the report design file before deployment, as described in the following section.

When specifying network paths in BIRT reports always use the Universal Naming Convention (UNC) to describe the path, instead of a mapped drive letter. Windows XP and later do not allow processes running as services to access network resources through mapped network drives. For this reason, a report that uses a mapped drive letter to access a resource runs in Actuate BIRT Designer Professional. The same report fails when running on iServer or Information Console, because the iServer or Information Console processes cannot resolve the mapping address.

For example, a BIRT report uses a flat file `Production.csv` as a data source. The flat file is located on a shared network drive on a machine, named `ProductionServer`. The UNC network path to the file is `\\ProductionServer\e$\Data` and it is mapped as `X:\` in your system. Using the path `X:\` to define the data source

HOME folder works only in Actuate BIRT Designer. Using the UNC path \\ProductionServer\e\$\Data in the data source definition is the correct way to define network paths.

---

## Accessing BIRT report design and BIRT resource path in custom ODA plug-ins

ODA providers often need to obtain information about a resource path defined in ODA consumer applications. For example, if you develop an ODA flat file data source, you can implement an option to look up the data files in a path relative to a resource folder managed by its consumer. Such resource identifiers are needed in both design-time and run-time drivers.

ODA consumer applications are able to specify:

- The run-time resource identifiers and pass them to the ODA run-time driver in an application context map
- The design-time resource identifiers in a DataSourceDesign, as defined in an ODA design session model

### Accessing resource identifiers in the run-time ODA driver

For run time, the BIRT ODA run-time consumer passes its resource location information in the org.eclipse.datatools.connectivity.oda.util.ResourceIdentifiers instance in the appContext map. ODA run-time drivers can get the instance in any one of the setAppContext methods, such as IDriver.setAppContext:

- To get the instance from the appContext map, pass the map key ResourceIdentifiers.ODA\_APP\_CONTEXT\_KEY\_CONSUMER\_RESOURCE\_IDS, defined by the class as a method argument.
- To get the BIRT resource folder URI, call, getApplResourceBaseURI( ) method.
- To get the URI of the associated report design file folder call getDesignResourceBaseURI( ) method. The URI is application-dependent and it can be absolute or relative. If your application maintains relative URLs, call the getDesignResourceURILocator.resolve( ) method to get the absolute URI.

The code snippet on Listing 27-7 shows how to access the resource identifiers through the application context.

#### **Listing 27-7**    Accessing resource identifiers at run time

---

```
URI resourcePath = null;
URI absolutePath = null;
```

```

Object obj = this.appContext.get
 (ResourceIdentifiers.ODA_APP_CONTEXT_KEY_CONSUMER_RESOURCE
 _IDS);
if (obj != null)
{
 ResourceIdentifiers identifier = (ResourceIdentifiers)obj;

 if (identifier.getDesignResourceBaseURI() != null)
 { resourcePath = identifier.getDesignResourceBaseURI();

 if (! resourcePath.isAbsolute())
 absolutePath =
 identifier.getDesignResourceURILocator().resolve(
 resourcePath);
 else
 absolutePath = resourcePath;
 }
}

```

## Accessing resource identifiers in the design ODA driver

The resource identifiers are available to the custom ODA designer UI driver. The designer driver provides the user interface for the custom data source and data set. Typically, to implement a custom behavior, the data source UI driver extends the following class:

```

org.eclipse.datatools.connectivity.oda.design.ui.wizards
 .DataSourceWizardPage

```

The `DataSourceWizardPage` class has an inherited method, `getHostResourceIdentifiers( )`, that provides access to the resource and report paths. The extended `DataSourceWizardPage` just needs to call the base method to get the `ResourceIdentifiers` for its path's information. Similarly, if the custom driver implements a custom data source editor page, it extends:

```

org.eclipse.datatools.connectivity.oda.design.ui.wizards
 .DataSourceEditorPage

```

The `DataSourceEditorPage` class has an inherited method, `getHostResourceIdentifiers( )`. The extended class just needs to call the base class method to get the `ResourceIdentifiers` object for the two resource and report paths base URIs. Related primary methods in the `org.eclipse.datatools.connectivity.oda.design.ResourceIdentifiers` class are:

- `getDesignResourceBaseURI();`
- `getApplResourceBaseURI();`





# Configuring fonts in iServer

This chapter contains the following topics:

- About configuring fonts
- Understanding font configuration file priorities
- Understanding how the BIRT engine locates a font
- Understanding the font configuration file structure

---

## About configuring fonts

Actuate Information Console and iServer support rendering BIRT reports in different formats such as PDF, Microsoft Word, Postscript, and PowerPoint. The processes that do the conversion use the fonts installed on your system to display the report characters.

BIRT uses a flexible mechanism that supports configuring font usage and substitution. This mechanism uses font configuration files for different purposes that control different parts of the rendering process. The configuration files can configure the fonts used in specific operating systems, for rendering to specific formats, in specific locales only, or combinations of these parameters.

The plug-in folder, `org.eclipse.birt.report.engine.fonts`, contains the font configuration files. Table 28-1 shows the location of this folder in the supported BIRT environments.

**Table 28-1**      Locations of the font configuration file plug-in folder

Environment	Font configuration file folder location
Actuate BIRT Designer Professional	<code>\$Actuate&lt;release&gt;\BRDPro\eclipse\plugins</code>
Information Console	<code>\$Information Console\iportal\WEB-INF\platform\plugins</code>
iServer	<code>\$Actuate&lt;release&gt;\iServer\Jar\BIRT\platform\plugins</code>

---

## Understanding font configuration file priorities

BIRT reports use five different types of font configuration files. The font configuration file-naming convention includes information about the rendering format, the system platform, and the system locale, as shown in the following general format:

```
fontsConfig_<Format>_<Platform>_<Locale>.xml
```

The platform name is defined by the Java System property, `os.name`. The current Java Network Launch Protocol (JNLP) specification does not list the values for the `os` attributes. Instead it states that all values are valid as long as they match the values returned by the system property `os.name`. Values that only match the beginning of `os.name` are also valid. If you specify Windows and the `os.name` is Windows 98, for example, the operating system name is accepted as valid.

The following sample Java class code shows how to check the `os.name` property for the value on your machine:

```
class WhatOS
{
 public static void main(String args[])
 {
 System.out.println(System.getProperty("os.name"));
 }
}
```

BIRT supports the following types of font configuration files, with increasing priority:

- For all rendering formats

These files have no format specifier in their names. These configuration files are divided into three sub-types.

- The default configuration file:

`fontsConfig.xml`

- Configuration files for a specific platform, for example:

`fontsConfig_Windows_XP.xml`

- Configuration files for a specific platform and locale, for example:

`fontsConfig_Windows_XP_zh.xml`

`fontsConfig_Windows_XP_zh_CN.xml`

- For certain formats only

These files include the format specifier in their names. These configuration files are divided into two sub-types:

- The default configuration file for a format, for example:

`fontsConfig_pdf.xml`

- Configuration files for a format for a specific platform:

`fontsConfig_pdf_Windows_XP.xml`

---

## Understanding how the BIRT engine locates a font

The PDF layout engine renders the PDF, PostScript, and PowerPoint formats. The engine tries to locate and use the font specified at design time. The PDF layout engine searches for the font files first in the fonts folder of the plug-in, `org.eclipse.birt.report.engine.fonts`. If the specified font is not in this folder, the BIRT engine searches for the font in the system-defined font folder. You can change the default load order by using the settings in the font configuration file.

When the required font for a character is not available in the search path or is incorrectly installed, the engine uses the fonts defined in the UNICODE block for that character. If the UNICODE definition also fails, the engine replaces the character with a question mark (?) to denote a missing character. The font used for the ? character is the default font, Times-Roman.

The engine maps the generic family fonts to a PDF-embedded Type1 font, as shown in the following list:

- Cursive font styles to Times-Roman
- Fantasy font styles to Times-Roman
- Monospace font styles to Courier
- Sans-serif font styles to Helvetica
- Serif font styles to Times-Roman

---

## Understanding the font configuration file structure

The font configuration file, fontsConfig.xml, consists of the following major sections:

- <font-aliases>
- <composite-font>
- <font-paths>

### <font-aliases> section

In the <font-aliases> section, you can:

- Define a mapping from a generic family to a font family. For example, the following code defines a mapping from the generic type "serif" to a Type1 font family Times-Roman:

```
<mapping name="serif" font-family="Times-Roman"/>
```

- Define a mapping from a font family to another font family. This definition is useful if you want to use a font for PDF rendering which differs from the font used at design time. For example, the following code shows how to replace simsun with Arial Unicode MS:

```
<mapping name="simsun" font-family="Arial Unicode MS"/>
```

Previous versions of Actuate BIRT Designer use the XML element <font-mapping> instead of <font-aliases>. In the current release, a <font-mapping> element works in the same way as the new <font-aliases> element. When a font configuration file uses both <font-mapping> and

<font-aliases>, the engine merges the different mappings from the two sections. If the same entries exist in both sections, the settings in <font-aliases> override those in <font-mapping>.

## <composite-font> section

The <composite-font> section is used to define a composite font, which is a font consisting of many physical fonts used for different characters. For example, to define a new font for currency symbols, you change font-family in the following <block> entry to the Times Roman font-family:

```
<composite-font>
...
<block name="Currency Symbols" range-start="20a0"
 range-end="20cf" index="58" font-family="Times Roman" />
...
</composite-font>
```

The composite fonts are defined by <block> entries. Each <block> entry defines a mapping from a UNICODE range to a font family name, which means the font family is applied for the UNICODE characters in that range. You cannot change the block name or range or index as it is defined by the UNICODE standard. The only item you can change in the block element is the font-family name. You can find information about all the possible blocks at <http://www.unicode.org/charts/index.html>.

In cases when the Times Roman font does not support all the currency symbols, you can define the substitution character by character using the <character> tag, as shown in the following example:

```
<composite-font>
...
 <character value="?" font-family="Angsana New"/>
 <character value="\u0068" font-family="Times Roman"/>
...
</composite-font>
```

Note that characters are represented by the attribute, value, which can be presented two ways, the character itself or its UNICODE code.

You can find information about all the currency symbols from <http://www.unicode.org/charts/symbols.html>.

A composite font named all-fonts is applied as a default font. When a character is not defined in the desired font, the font defined in all-fonts is used.

## <font-paths> section

If the section <font-paths> is set in fontsConfig.xml, the engine ignores the system-defined font folder, and loads the font files specified in the section,

<font-paths>. You can add a single font path or multiple paths, ranging from one font path to a whole font folder, as shown in the following example:

```
<path path="c:/windows/fonts"/>
<path path="/usr/X11R6/lib/X11/fonts/TrueType/arial.ttf"/>
```

If this section is set, the PDF layout engine will only load the font files in these paths and ignore the system-defined font folder. If you want to use the system font folder as well, you must include it in this section.

On some systems, the PDF layout engine does not recognize the system-defined font folder. If you encounter this issue, add the font path to the <font-paths> section.

# Working with BIRT encryption in iServer

This chapter contains the following topics:

- About BIRT encryption
- About the BIRT default encryption plug-in
- Creating a BIRT report that uses the default encryption
- Deploying multiple encryption plug-ins
- Deploying encryption plug-ins to iServer
- Generating encryption keys
- Creating a custom encryption plug-in
- Using encryption API methods

---

## About BIRT encryption

BIRT provides an extension framework to support users registering their own encryption strategy with BIRT. The model implements the Java™ Cryptography Extension (JCE). The Java encryption extension framework provides multiple popular encryption algorithms, so the user can just specify the algorithm and key to have a high security level encryption. The default encryption extension plug-in supports customizing the encryption implementation by copying the BIRT default plug-in, and giving it different key and algorithm settings.

JCE provides a framework and implementations for encryption, key generation and key agreement, and message authentication code (MAC) algorithms. Support for encryption includes symmetric, asymmetric, block, and stream ciphers. The software also supports secure streams and sealed objects.

A conventional encryption scheme has the following five major parts:

- Plaintext, the text to which an algorithm is applied.
- Encryption algorithm, the mathematical operations to conduct substitutions on and transformations to the plaintext. A block cipher is an algorithm that operates on plaintext in groups of bits, called blocks.
- Secret key, the input for the algorithm that dictates the encrypted outcome.
- Ciphertext, the encrypted or scrambled content produced by applying the algorithm to the plaintext using the secret key.
- Decryption algorithm, the encryption algorithm in reverse, using the ciphertext and the secret key to derive the plaintext content.

---

## About the BIRT default encryption plug-in

BIRT's default encryption algorithm is implemented as a plug-in named:

```
com.actuate.birt.model.defaultsecurity_<Release>
```

Table 29-1 shows the location of this plug-in folder in the supported BIRT environments.

**Table 29-1**      Locations of the default encryption plug-in folder

Environment	Font configuration file folder location
Actuate BIRT Designer Professional	\$Actuate<Release>\BRDPro\eclipse\plugins
Information Console	\$Information Console\iportal\webapps\iportal \WEB-INF\platform\plugins



**Table 29-1**      Locations of the default encryption plug-in folder

Environment	Font configuration file folder location
iServer	\$Actuate<Release>\iServer\Jar\BIRT\platform\plugins

## About supported encryption algorithms

Two different cryptographic methods, private-key and public-key encryptions, solve computer security problems. Private-key encryption is also known as symmetric encryption. In private-key encryption, the sender and receiver of information share a key that is used for both encryption and decryption. In public-key encryption, two different mathematically related keys, known as a key pair, are used to encrypt and decrypt data. Information encrypted using one key can only be decrypted by using the other member of the key pair. BIRT's default encryption plug-in supports the following algorithms within these two methods:

- Private-key encryption.
  - DES is the Digital Encryption Standard as described in FIPS PUB 46-2 at <http://www.itl.nist.gov/fipspubs/fip46-2.htm>. The DES algorithm is the most widely used encryption algorithm in the world. This algorithm is the default encryption that BIRT uses.
  - DESede, triple DES encryption

Triple-DES or DESede is an improvement over DES. This algorithm uses three DES keys k1, k2, and k3. A message is encrypted using k1 first, then decrypted using k2 and encrypted again using k3. This technique is called DESencryptiondecryptionencryption. Two or three keys can be used in DESede. This algorithm increases security as the key length effectively increases from 56 to 112 or 168.
- Public-key encryption supports the RSA algorithm.

RSA uses both a public key and a private key. The public key can be known to everyone and is used for encrypting messages. Messages encrypted with the public key can only be decrypted using the private key.

## About the components of the BIRT default encryption plug-in

The BIRT default encryption plug-in consists of the following main modules:

- acdefaultsecurity.jar
- encryption.properties file
- META-INF/MANIFEST.MF
- plugin.xml

## About acdefaultsecurity.jar

This JAR file contains the encryption classes. The default encryption plug-in also provides key generator classes that can be used to create different encryption keys.

## About encryption.properties

This file specifies the encryption settings. BIRT loads the encryption type, encryption algorithm, and encryption keys from the encryption.properties file to do the encryption. The file contains pre-generated default keys for each of the supported algorithms.

You define the following properties in the encryption.properties file:

- **Encryption type**  
Type of algorithm. Specify one of the two values, symmetric encryption or public encryption. The default type is symmetric encryption.
- **Encryption algorithm**  
The name of the algorithm. You must specify the correct encryption type for each algorithm. For the symmetric encryption type, BIRT supports DES and DESede. For public encryption type, BIRT supports RSA.
- **Encryption mode**  
In cryptography, a block cipher algorithm operates on blocks of fixed length, which are typically 64 or 128 bits. Because messages can be of any length, and because encrypting the same plaintext with the same key always produces the same output, block ciphers support several modes of operation to provide confidentiality for messages of arbitrary length. Table 29-2 shows all supported modes.

**Table 29-2** Supported encryption modes

Mode	Description
None	No mode
CBC	Cipher Block Chaining Mode, as defined in the National Institute of Standards and Technology (NIST) Federal Information Processing Standard (FIPS) PUB 81, "DES Modes of Operation," U.S. Department of Commerce, Dec 1980
CFB	Cipher Feedback Mode, as defined in FIPS PUB 81
ECB	Electronic Codebook Mode, as defined in FIPS PUB 81
OFB	Output Feedback Mode, as defined in FIPS PUB 81
PCBC	Propagating Cipher Block Chaining

- Encryption padding

Because a block cipher works on units of a fixed size, but messages come in a variety of lengths, some modes, for example CBC, require that the final block be padded before encryption. Several padding schemes exist. The supported paddings are shown in Table 29-3. All padding settings are applicable to all algorithms.

**Table 29-3** Supported encryption paddings

Mode	Description
NoPadding	No padding.
OAEP	Optimal Asymmetric Encryption Padding (OAEP) is a padding scheme that is often used with RSA encryption.
PKCS5Padding	The padding scheme described in RSA Laboratories, “PKCS #5: Password-Based Encryption Standard,” version 1.5, November 1993. This encryption padding is the default.
SSL3Padding	The padding scheme defined in the SSL Protocol Version 3.0, November 18, 1996, section 5.2.3.2.

- Encryption keys

Actuate provides pre-generated keys for all algorithms.

Listing 29-1 shows the default contents of encryption.properties.

**Listing 29-1** Default encryption.properties

```
#message symmetric encryption , public encryption.
type=symmetric encryption

#private encryption: DES(default), DESede
#public encryption: RSA
algorithm=DES

NONE , CBC , CFB , ECB(default) , OFB , PCBC
mode=ECB
NoPadding , OAEP , PKCS5Padding(default) , SSL3Padding
padding=PKCS5Padding

#For key , support default key value for algorithm
#For DESede ,DES we only need to support private key
#private key value of DESede algorithm : 20b0020...
#private key value of DES algorithm: 527c2qI

#for RSA algorithm , there is key pair. you should support
private-public key pair
```

```
#private key value of RSA algorithm: 30820...
#public key value of RSA algorithm: 30819...
#private key
symmetric-key=527c23...
#public key
public-key=
```

## About META-INF/MANIFEST.MF

META-INF/MANIFEST.MF is a text file that is included inside a JAR to specify metadata about the file. Java's default ClassLoader reads the attributes defined in MANIFEST.MF and appends the specified dependencies to its internal classpath. The encryption plug-in ID is the value of the Bundle-SymbolicName property in the manifest file for the encryption plug-in. You need to change this property when you deploy multiple instances of the default encryption plug-in, as described later in this chapter. Listing 29-2 shows the contents of the default MANIFEST.MF.

### Listing 29-2 Default MANIFEST.MF

---

```
Manifest-Version: 1.0
Bundle-ManifestVersion: 2
Bundle-Name: Actuate Default Security Plug-in
Bundle-SymbolicName:
 com.actuate.birt.model.defaultsecurity;singleton:=true
Bundle-Version: <release><version>
Require-Bundle: org.eclipse.birt.report.model,
 org.eclipse.core.runtime
Export-Package: com.actuate.birt.model.defaultsecurity.api
Bundle-ClassPath: acdefaultsecurity.jar
Bundle-Vendor: Actuate Corporation
Eclipse-LazyStart: true
Bundle-Activator:
 com.actuate.birt.model.defaultsecurity.properties.
 SecurityPlugin
```

## About plugin.xml

plugin.xml is the plug-in descriptor file. This file describes the plug-in to the Eclipse platform. The platform reads this file and uses the information to populate and update, as necessary, the registry of information that configures the whole platform. The <plugin> tag defines the root element of the plug-in descriptor file. The <extension> element within the <plugin> element specifies the Eclipse extension point that this plug-in uses,

org.eclipse.birt.report.model.encryptionHelper. This extension point requires a sub-element, <encryptionHelper>. This element uses the following attributes:

- class

The qualified name of the class that implements the interface IEncryptionHelper. The default class name is com.actuate.birt.model.defaultsecurity.api.DefaultEncryptionHelper.

- extensionName

The unique internal name of the extension. The default extension name is jce.

- isDefault

The field indicating whether this encryption extension is the default for all encryptable properties. This property is valid only in a BIRT Report Designer environment. When an encryption plug-in sets the value of this attribute to true, the BIRT Report Designer uses this encryption method as the default to encrypt data. There is no default encryption mode in iServer and Information Console. The encryption model that BIRT uses supports implementing and using several encryption algorithms. The default encryption plug-in is set as default using this isDefault attribute. If you implement several encryptionHelpers, set this attribute to true for only one of the implementations. If you implement multiple encryption algorithms and set isDefault to true to more than one instance, BIRT treats the first loaded encryption plug-in as the default algorithm.

Listing 29-3 shows the contents of the default encryption plug-in's plugin.xml.

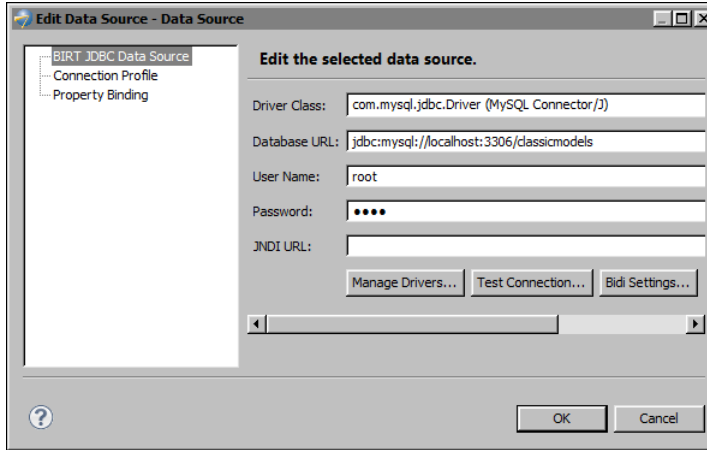
**Listing 29-3**     Default plugin.xml

---

```
<?xml version="1.0" encoding="UTF-8"?>
<?eclipse version="3.2"?>
<plugin>
 <extension
 id="encryption"
 name="default encryption helper"
 point="org.eclipse.birt.report.model.encryptionHelper">
 <encryptionHelper
 class="com.actuate.birt.model.defaultsecurity.api
 .DefaultEncryptionHelper"
 extensionName="jce" isDefault="true" />
 </extension>
 </plugin>
```

## Creating a BIRT report that uses the default encryption

This section describes an example that shows how the entire mechanism works. This example uses Actuate BIRT Designer to create a report design. The report design connects to a MySQL Enterprise database server using the user, root, and password, root, as shown in Figure 29-1.



**Figure 29-1** Data source properties for the encryption example

The encryption model stores the encrypted value of the database password in the report design file. Along with the value, the model stores the encryptionID. In this way, it identifies the encryption mechanism used to encrypt the password, as shown in the <encrypted-property> element in the following code:

```
<data-sources>
<oda-data-source
 extensionID="org.eclipse.birt.report.data.oda.jdbc" name="Data
 Source" id="6">
 <property name="odaDriverClass">
 com.mysql.jdbc.Driver
 </property>
 <property name="odaURL">
 jdbc:mysql://localhost:3306/classicmodels
 </property>
 <property name="odaUser">root</property>
 <encrypted-property name="odaPassword" encryptionID="jce">
 10e52...
 </encrypted-property>
</oda-data-source>
</data-sources>
```

iServer uses the encryptionID attribute of the <encrypted-property> element to identify the algorithm to decrypt the password. After using the algorithm on the value of <encrypted-property>, iServer connects to the database and generates the report.

---

## Deploying multiple encryption plug-ins

In some cases, you need to use an encryption mechanism other than the Data Source Explorer default in your report application. For example, some applications need to create an encryption mechanism using the RSA algorithm that the default encryption plug-in supports. In this case, you must create an additional encryption plug-in instance. For use within Actuate BIRT Designer, you can set this plug-in as the default encryption mechanism. If you change the default encryption mechanism, you must take care when you work with old report designs. For example, if you change an existing password field in the designer, the designer re-encrypts the password with the current default encryption algorithm regardless of the original algorithm that the field used.

### How to create a new instance of the default encryption plug-in

- 1 Make a copy of the default encryption plug-in:

- 1 Copy the folder:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins
 \com.actuate.birt.model.defaultsecurity_<Release>
```

- 2 Paste the copied folder in the same folder:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins
```

- 3 Rename:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins\Copy of
 com.actuate.birt.model.defaultsecurity_<Release>
```

to a new name, such as:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins
 \com.actuate.birt.model.defaultsecurity_<Release>_rsa
```

- 2 Modify the new plug-in's manifest file:

- 1 Open:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins
 \com.actuate.birt.model.defaultsecurity_2.3.2_rsa\
 META-INF\MANIFEST.MF
```

- 2 Change:

```
Bundle-SymbolicName:
 com.actuate.birt.model.defaultsecurity
```

to:

```
Bundle-SymbolicName:
 com.actuate.birt.model.defaultsecurity.rsa
```

MANIFEST.MF now looks similar to the one in Listing 29-4.

**Listing 29-4**      Modified MANIFEST.MF for the new encryption plug-in

---

```
Manifest-Version: 1.0
Bundle-ManifestVersion: 2
Bundle-Name: Actuate Default Security Plug-in
Bundle-SymbolicName:
 com.actuate.birt.model.defaultsecurity.rsa;singleton:=true
Bundle-Version: <Release>.<Version>
Require-Bundle: org.eclipse.birt.report.model,
 org.eclipse.core.runtime
Export-Package: com.actuate.birt.model.defaultsecurity.api
Bundle-ClassPath: acdefaultsecurity.jar
Bundle-Vendor: Actuate Corporation
Eclipse-LazyStart: true
Bundle-Activator: com.actuate.birt.model.defaultsecurity
 .properties.SecurityPlugin
```

**3** Save and close MANIFEST.MF.

**3** Modify the new plug-in's descriptor file to be the default encryption plug-in:

**1** Open:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins
 \com.actuate.birt.model.defaultsecurity_<Release>_rsa
 \plugin.xml
```

**2** Change:

```
extensionName="jce"
```

to:

```
extensionName="rsa"
```

plugin.xml now looks similar to the one in Listing 29-5.

**3** Save and close plugin.xml.

**Listing 29-5**      Modified plugin.xml for the new encryption plug-in

---

```
<?xml version="1.0" encoding="UTF-8"?>
<?eclipse version="<Version>"?>
<plugin>
```



```

<extension
 id="encryption"
 name="default encryption helper"
 point="org.eclipse.birt.report.model.encryptionHelper">
 <encryptionHelper
 class="com.actuate.birt.model.defaultsecurity.api
 .DefaultEncryptionHelper"
 extensionName="rsa" isDefault="true" />
 </extension>
</plugin>

```

- 4 Modify the original plug-in's descriptor file, so that it is no longer the default encryption plug-in:

- 1 Open:

```

$ACTUATE_HOME\BRDPro\eclipse\plugins
\com.actuate.birt.model.defaultsecurity_<Release>
\plugin.xml

```

- 2 Change:

```

isDefault="true"
to:
isDefault="false"

```

- 3 Save and close plugin.xml.

- 5 Set the encryption type in the new plug-in to RSA:

- 1 Open:

```

$ACTUATE_HOME\BRDPro\eclipse\plugins
\com.actuate.birt.model.defaultsecurity_<Release>_rsa
\encryption.properties

```

- 2 Change the encryption type to public encryption:

```

type=public encryption

```

- 3 Change the algorithm type to RSA:

```

algorithm=RSA

```

- 4 Copy the pre-generated private and public keys for RSA to the symmetric-key and public-key properties. encryption.properties now looks similar to the one in Listing 29-6.

- 5 Save and close encryption.properties.

**Listing 29-6** Modified encryption.properties file for the new encryption plug-in

---

```
#message symmetric encryption , public encryption
 type=public encryption
#private encryption: DES(default), DESede
#public encryption: RSA
 algorithm=RSA
NONE , CBC , CFB , ECB(default) , OFB , PCBC
 mode=ECB
#NoPadding , OAEP , PKCS5Padding(default) , SSL3Padding
padding=PKCS5Padding
#For key , support default key value for algorithm
#For DESede ,DES we only need to support private key
#private key value of DESede algorithm : 20b0020e918...
#private key value of DES algorithm: 527c23ea...
RSA algorithm uses a key pair. You should support
#private-public key pair
#private key value of RSA algorithm: 308202760201003....
#public key value of RSA algorithm: 30819f300d0....
#private key
symmetric-key=308202760....
#public key
public-key=30819f300d0.....
```

- 6 To test the new default RSA encryption, open Actuate BIRT Designer and create a new report design. Create a data source and type the password.
- 7 View the XML source of the report design file. Locate the data source definition code. The encryptionID is rsa, as shown in the following sample:

```
<data-sources>
 <oda-data-source name="Data Source" id="6"
 extensionID="org.eclipse.birt.report.data.oda.jdbc" >
 <text-property name="displayName"></text-property>
 <property name="odaDriverClass">
 com.mysql.jdbc.Driver
 </property>
 <property name="odaURL">
 jdbc:mysql://192.168.218.225:3306/classicmodels
 </property>
 <property name="odaUser">root</property>
 <encrypted-property name="odaPassword"
 encryptionID="rsa">
 36582dc88.....
 </encrypted-property>
 </oda-data-source>
</data-sources>
```

- 8 Create a data set and a simple report design. Preview the report to validate that BIRT connects successfully to the database server using the encrypted password. Before trying to connect to the data source the report engine decrypts the password stored in the report design using the default RSA encryption plug-in. Then the engine submits the decrypted value to the database server.

---

## Deploying encryption plug-ins to iServer

If you deploy your report designs to iServer, you need to deploy the report and the new encryption plug-in to iServer. iServer loads all encryption plug-ins at start up. During report execution, iServer reads the encryptionID property from the report design file and uses the corresponding encryption plug-in to decrypt the encrypted property. Every time you create reports using a new encryption plug-in, make sure you deploy the plug-in to iServer, otherwise the report execution on the server will fail.

When using iServer, you do not need to deploy the encryption plug-ins to Information Console.

### How to deploy a new encryption plug-in instance to iServer

- 1 Copy:

```
$ACTUATE_HOME\BRDPro\eclipse\plugins
 \com.actuate.birt.model.defaultsecurity_2.3.2_rsa
```

to:

```
$ACTUATE_HOME\iServer\Jar\BIRT\platform\plugins
```

- 2 Publish your report design to iServer.
- 3 Restart iServer to load the new encryption plug-in.
- 4 Log in to iServer using Information Console and run the report. iServer now uses the new encryption plug-in to decrypt the password.

---

## Generating encryption keys

The default encryption plug-in provides classes that can be used to generate different encryption keys. The classes names are `SymmetricKeyGenerator` and `PublicKeyPairGenerator`. `SymmetricKeyGenerator` generates private keys, which are also known as symmetric keys. `PublicKeyPairGenerator` generates public keys. Both classes require `acdefaultsecurity.jar` in the classpath.

Both classes take two parameters, the encryption algorithm and the output file, where the generated encrypted key is written. The encryption algorithm is a

required parameter. The output file is an optional parameter. If you do not provide the second parameter, the output file is named key.properties and is saved in the current folder. The encryption algorithm values are shown in Table 29-4.

**Table 29-4** Key-generation classes and parameters

Class name	Encryption algorithm parameter
com.actute.birt.model.defaultsecurity.api.keygenerator.SymmetricKeyGenerator	des
com.actute.birt.model.defaultsecurity.api.keygenerator.SymmetricKeyGenerator	desede
com.actute.birt.model.defaultsecurity.api.keygenerator.PublicKeyPairGenerator	rsa

### How to generate a symmetric encryption key

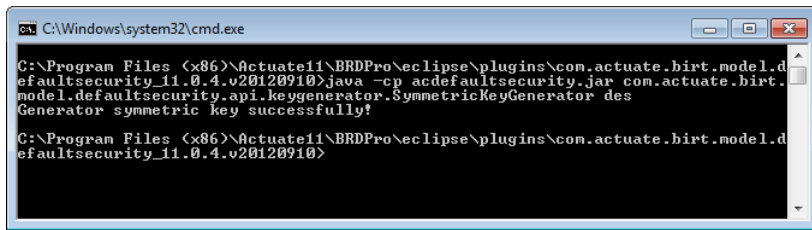
Run the main function of SymmetricKeyGenerator.

- 1 To navigate to the default security folder, open a command prompt window and type:

```
cd C:\Program Files\Actuate11\BRDPro\eclipse\plugins
\com.actuate.birt.model.defaultsecurity_<Release>
```

- 2 To generate the key, as shown in Figure 29-2, type:

```
java -cp acdefaultsecurity.jar
com.actuate.birt.model.defaultsecurity.api.keygenerator.
SymmetricKeyGenerator des
```



**Figure 29-2** Symmetric key generation

- 3 The generated key is saved in the file, key.properties. The content of the file looks like this one:

```
#Key Generator
#Mon Sep 17 10:26:58 PDT 2012
symmetric-key=c402dad0c7a8...
```

- 4 Copy the key from the generated key file to the encryption.properties file.

## How to generate a public key using RSA encryption

Run the main function of `PublicKeyPairGenerator`.

- 1 To navigate to the default security folder, open a command prompt window and type:

```
cd C:\Program Files\Actuate11\BRDPro\eclipse\plugins
 \com.actuate.birt.model.defaultsecurity_<Release>
```

- 2 In the command prompt window, type:

```
java -cp adefaultsecurity.jar
 com.actuate.birt.model.defaultsecurity.api.keygenerator.
 PublicKeyPairGenerator rsa
```

The class generates a pair of keys saved in the `key.properties` file:

```
#Key Generator
#Mon Sep 17 10:34:58 PDT 2012
public-key=30819f300d06092a86...
symmetric-key=3082027...
```

- 3 Copy the key from the generated key file to the `encryption.properties` file.

---

## Creating a custom encryption plug-in

To create a custom encryption plug-in, you need to extend the following extension point:

```
org.eclipse.birt.report.model.encryptionHelper
```

The interface `IEncryptionHelper` defines two methods, as shown in the following code:

```
public interface IEncryptionHelper
{
 public String encrypt(String string);

 public String decrypt(String string);
}
```

You need to implement these methods and program your encryption and decryption logic there.

To install the custom encryption plug-in, copy the plug-in to the product's plugins folder, where the default plug-in resides. Change the `isDefault` property in `plugin.xml` to `true`. Change the `isDefault` properties of the rest of the encryption plug-ins to `false`.

---

## Using encryption API methods

You can call the API methods in the default encryption plug-in when you have to set the encryptionID property, or encrypt data programmatically. The following list describes these methods and shows their signatures:

- `IEncryptionHelper::encrypt` encrypts the given string, and returns the encrypted string:  

```
String IEncryptionHelper::encrypt(String value)
```
- `IEncryptionHelper::decrypt` decrypts the given encrypted string, and returns the original string:  

```
public String IEncryptionHelper::decrypt(String string)
```
- `MetaDataDictionary::getEncryptionHelper` returns the encryption helper with the extension ID:  

```
public IEncryptionHelper
 MetaDataDictionary::getEncryptionHelper(String id)
```
- `MetaDataDictionary::getEncryptionHelpers` gets all the encryption helpers:  

```
public List MetaDataDictionary::getEncryptionHelpers()
```

# Using custom emitters in iServer

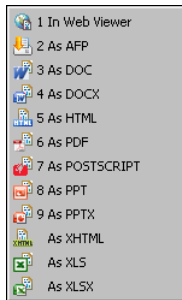
This chapter contains the following topics:

- About custom emitters
- Deploying custom emitters to iServer and Information Console
- Rendering in custom formats
- Configuring the default export options for a BIRT report

---

## About custom emitters

In Actuate BIRT Designer Professional or Interactive Viewer, you can choose to render BIRT reports in several different formats, as shown in Figure 30-1.



**Figure 30-1**      Rendering formats

Actuate provides out-of-the-box report rendering for the following file formats:

- AFP - Advanced Function Printing document format
- DOC - Microsoft Word document
- DOCX - Microsoft Word document, introduced in Windows 7
- HTML - HyperText Markup Language document, a standard format used for creating and publishing documents on the World Wide Web
- PDF - Created by Adobe, a portable file format intended to facilitate document exchange
- POSTSCRIPT - A page description language document for medium- to high-resolution printing devices
- PPT - Microsoft PowerPoint document
- PPTX - Microsoft PowerPoint document for Windows 7
- XHTML - Extensible Hypertext Markup Language document, the next generation of HTML, compliant with XML standards
- XLS/XLSX - MS-Excel Document

If you need to export your document to a format not directly supported by Actuate, such as CSV and XML, you need to develop a custom emitter. Actuate supports using custom emitters to export reports to custom formats. After a system administrator places custom emitters in the designated folder in Information Console or iServer, and registers the emitters with iServer, he must restart the product. Users then are able to use the emitters as output formats when scheduling BIRT report jobs in iServer or exporting BIRT reports in Information Console. Custom emitters are also supported as e-mail attachment formats.



iServer uses the custom emitter format type as a file extension for the output file when doing the conversion. When you develop custom emitters, always use the same name for a format type and an output file extension type. Management Console and Actuate Information Console for iServer display the options of each emitter for the user to choose when exporting a report.

The *Integrating and Extending BIRT* book, published by Addison-Wesley, provides detailed information about how to develop custom emitters in BIRT.

---

## Deploying custom emitters to iServer and Information Console

The custom emitters in BIRT are implemented as plug-ins and packaged as JAR files. To make them available to the Actuate products that support them, copy the emitters to the MyClasses folder. The MyClasses folder appears at different levels on different platforms and but it is always available at the product's installation folder. For iServer the folder is at the following location:

```
Actuate<release>/iServer/MyClasses/eclipse/plugins
```

When you install InformationConsole.war file to your own J2EE application server, the shared folder MyClasses is not available. In this case, custom emitter plug-ins should be copied to the following folder:

```
<context-root>/WEB-INF/platform/plugins
```

Every time you deploy a custom emitter you need to restart the product. This ensures the emitter JAR is added to the classpath and the product can discover the new rendering format. For iServer deployment you must execute an extra step to register the emitter with iServer.

The following tools and products support custom emitters:

- Actuate BIRT DesignerProfessional
- Actuate BIRT Studio
- BIRT Interactive Viewer for iServer
- Information Console for iServer
- iServer

---

## Rendering in custom formats

After deploying the custom emitter, you can see the new rendering formats displayed along with built-in emitters in the following places:

- Preview report in Web Viewer in Actuate BIRT Designer
- Output page of schedule job in Management Console and Information Console for iServer
- Attachment notification page of schedule job in Management Console or Information Console for iServer
- Export content in Actuate BIRT Viewer and Actuate BIRT Interactive Viewer

The following examples show the deployment and usage of a custom CSV emitter. The CSV emitter renders a report as a comma-separated file. The JAR file name is `org.eclipse.birt.report.engine.emitter.csv.jar`. The custom format type is `MyCSV`.

To test the emitter functionality with Management and Information Consoles, you schedule any BIRT report design or report document from the examples in the Public folder. The examples that follow use the report from the sample Encyclopedia volume for an iServer:

`Public/BIRT and BIRT Studio Examples/CustomerList.rptdesign`

### How to deploy a custom emitter to iServer

This example assumes that the iServer is installed in the `Actuate<Release>` folder on Windows.

- 1 Copy `org.eclipse.birt.report.engine.emitter.csv.jar` to:

`Actuate<Release>\iServer\MyClasses\eclipse\plugins`

- 2 Register the emitter with iServer.

- 1 Open the following file:

`Actuate<Release>\iServer\etc\jfcstsvrconfig.xml`

JREM uses this configuration file at startup to load the registered emitters.

- 2 Navigate to the end of the file to find the following entry:

```
<node name="BIRTReportRenderOption">
```

The entry contains a list of emitter descriptions separated by a semicolon. The emitter description must have the format type and the emitter id separated by a colon. For example, the PDF emitter is described as:

```
pdf:org.eclipse.birt.report.engine.emitter.pdf;
```

- 3 Add your emitter description to the beginning of the `<entry name="RenderFormatEmitterIdMapping">` tag:

```
MyCSV:org.eclipse.birt.report.engine.emitter.csv;
```

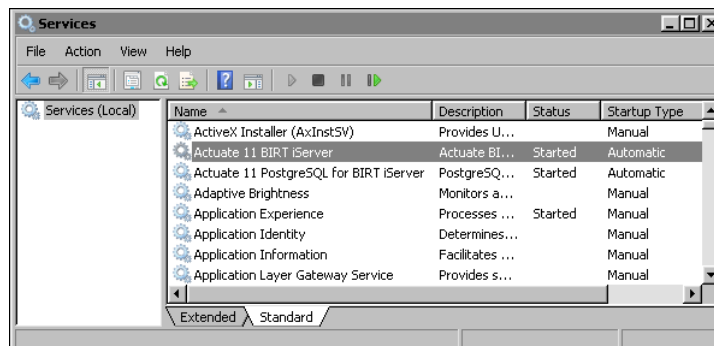
The whole tag would look like this:

```
<node name="BIRTReportRenderOption">

<!-- The value is "render_format:emitter_ID" separated by ";",
 for example, pdf:org.eclipse.birt.report.engine.emitter.pdf;
 xml:org.eclipse.birt.report.engine.emitter.xml -->

<entry name="RenderFormatEmitterIdMapping">
 MyCSV:org.eclipse.birt.report.engine.emitter.csv;
 html:org.eclipse.birt.report.engine.emitter.html;
 xhtml:com.actuate.birt.report.engine.emitter.xhtml;
 pdf:org.eclipse.birt.report.engine.emitter.pdf;
 postscript:org.eclipse.birt.report.engine.emitter.postscript;
 xls:com.actuate.birt.report.engine.emitter.xls;
 ppt:org.eclipse.birt.report.engine.emitter.ppt;
 pptx:com.actuate.birt.report.engine.emitter.pptx;
 doc:org.eclipse.birt.report.engine.emitter.word;
 docx:com.actuate.birt.report.engine.emitter.docx
</entry>
</node>
```

- 3 Restart the iServer to make it load the new plug-in in its classpath:
  - Restart Actuate iServer <Release> from Start>Settings>Control Panel>Administrative Tools>Services, as shown in Figure 30-2.
  - If you use a separately deployed Information Console, you must also restart Apache Tomcat for Actuate Information Console <Release>.



**Figure 30-2** Services

The following procedures show how to export a BIRT report to a custom format in different products. The procedures use an example format, MyCSV.

### How to deploy and use a custom emitter in Actuate BIRT Designer

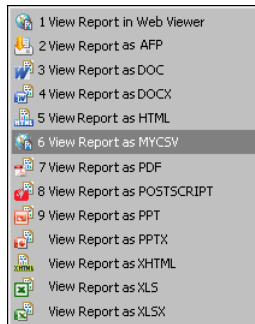
This example assumes that iServer is installed in the Actuate<Release> folder on Windows.

- 1 Copy the emitter to:

Actuate<Release>\MyClasses\eclipse\plugins

- 2 Reopen the designer.
- 3 Preview the report in Web Viewer.

The new MYCSV format appears in the list of formats, as shown in Figure 30-3.

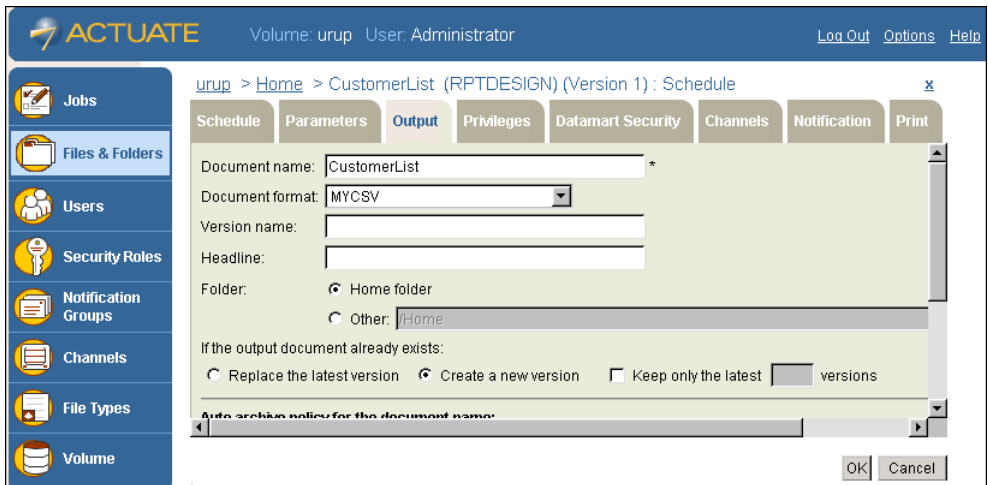


**Figure 30-3** List of available formats in Web Viewer

### How to export a BIRT report in iServer Management Console

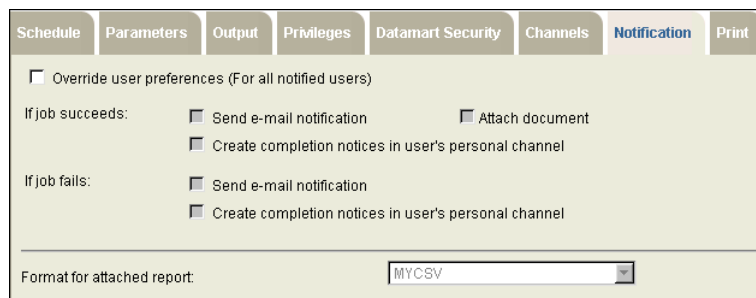
- 1 Open iServer Management Console.
- 2 Navigate to the Public/BIRT and BIRT Studio Examples folder.
- 3 Click the blue arrow next to CustomerList.rptdesign and choose the Schedule option from the menu.
- 4 In the Schedule page, select Output tab.

The new MYCSV format appears in the list of the available formats, as shown in Figure 30-4.



**Figure 30-4** Output format in Management Console

- 5 Choose the Notification tab in the same Schedule Job page. Select MYCSV format from the Format for the attached report's drop-down list, as shown in Figure 30-5.

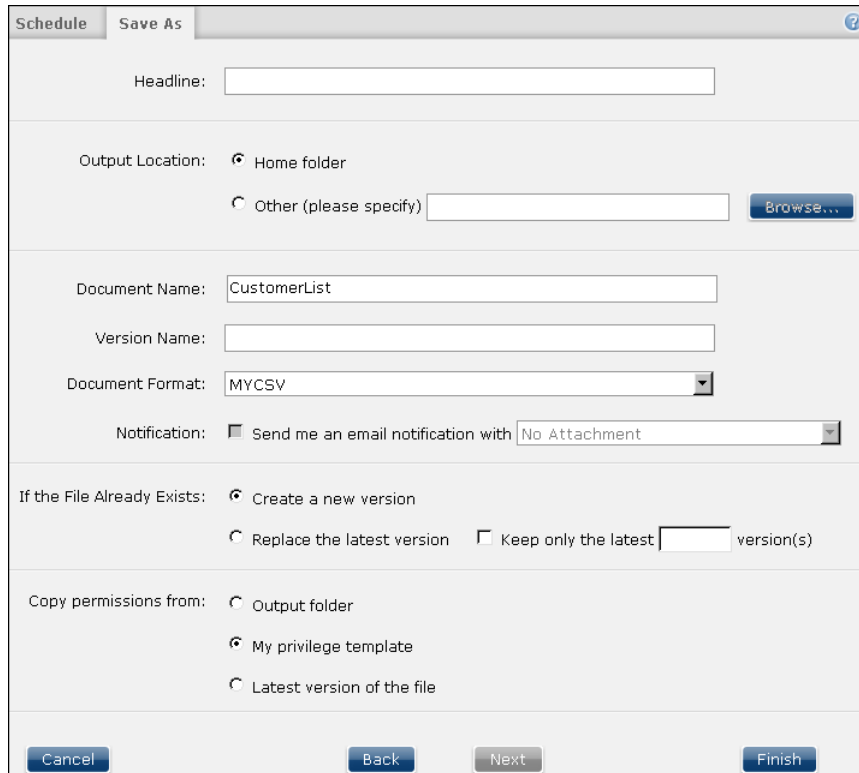


**Figure 30-5** Notification tab in the Schedule Job page

- 6 Choose OK. The generated report is saved as CustomerList.MYCSV in the Encyclopedia volume. The report is also attached to the e-mail notification.

### How to export a BIRT report from Information Console or iServer

Schedule a BIRT report to run by choosing Save As on the Schedule page. The new MYCSV format appears in the document format list. You can also select to attach the output report to an e-mail notification, as shown in Figure 30-6.



**Schedule** **Save As**

Headline:

Output Location: ☒ Home folder  
☐ Other (please specify)  **Browse...**

Document Name:

Version Name:

Document Format:

Notification: ☒ Send me an email notification with

If the File Already Exists: ☒ Create a new version  
☐ Replace the latest version ☐ Keep only the latest  version(s)

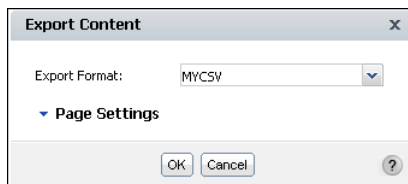
Copy permissions from: ☐ Output folder  
☒ My privilege template  
☐ Latest version of the file

**Cancel** **Back** **Next** **Finish**

**Figure 30-6** Save As tab in the Schedule Jobs page in Information Console

### How to export a BIRT report from Actuate BIRT Viewer or Actuate BIRT Interactive Viewer

- 1 Open a BIRT report in Actuate BIRT Viewer or Interactive Viewer.
- 2 Select Export Content from the viewer menu. The new MYCSV format shows up in Export Format, as shown in Figure 30-7.



**Export Content** X

Export Format:

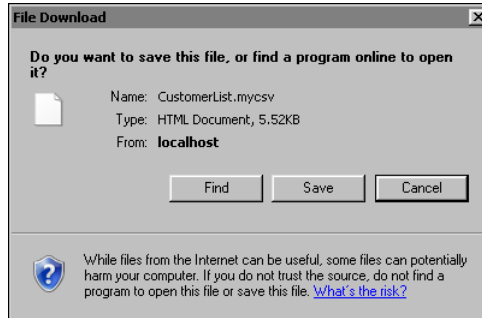
▼ Page Settings

**OK** **Cancel** ?

**Figure 30-7** Export Content in Actuate BIRT Viewer

- 3 Choose OK.

A file download window appears, as shown in Figure 30-8. You can choose to open or save the file. The suggested file name is CustomerList.mycsv.



**Figure 30-8** File Download

---

## Configuring the default export options for a BIRT report

You can export a BIRT report to various formats from the web viewer. These formats include docx, pptx, xls, xlsx, pdf, ps, doc, and ppt. You can configure the default export options by creating a `RenderDefaults.cfg` file that contains name-value pairs for the appropriate options. You must create a separate `RenderDefaults.cfg` file for each format. For example, when you export a BIRT report to XLSX, `RenderDefaults.cfg` can set `Enable pivot table` to `false` by default. Place `RenderDefaults.cfg` in the following locations:

- On iServer, place `RenderDefaults.cfg` in `<SERVER_HOME>\Jar\BIRT\platform\plugins\com.actuate.birt.report.engine.emitter.config.<EMITTER_TYPE>_<RELEASE_NUMBER>.jar`, for example `C:\Program Files (x86)\Actuate11SP5\iServer\Jar\BIRT\platform\plugins\com.actuate.birt.report.engine.emitter.config.xls_11.0.4.v20120810.jar`. When you create or modify `RenderDefaults.cfg`, you must restart iServer.
- On the desktop, place `RenderDefaults.cfg` in `<BDPRO_HOME>\eclipse\plugins\com.actuate.birt.report.engine.emitter.config.<EMITTER_TYPE>_<RELEASE_NUMBER>.jar`, for example `C:\Program Files (x86)\Actuate11\BRDPro\eclipse\plugins\com.actuate.birt.report.engine.emitter.config.xls_11.0.4.v20120810.jar`.

For information about creating a `RenderDefaults.cfg` file, see *Working with Actuate BIRT Viewers*.





# Part Four

---

**Using Actuate BIRT APIs**



## Using the BIRT data object API

This chapter contains the following topics:

- About generating data objects from an application
- Generating data object elements for BIRT report designs
- Tutorial 5: Creating a data element using the Design Engine API

---

## About generating data objects from an application

Actuate BIRT iServer includes a Design Engine API extension to create and alter data objects programmatically. This Actuate extension provides Java classes to automate data object generation, retrieving important information required regularly for any application. The classes that support BIRT data objects, DataMartCubeHandle, DataMartDataSetHandle, and DataMartDataSourceHandle, are contained in the com.actuate.birt.report.model.api package.

Like the BIRT data objects implemented in the BIRT data explorer, BIRT data objects generated by the Design Engine API generate data sources and data sets from a .datadesign or .data file. Using the extension requires programming in Java. Knowledge of XML is also helpful.

Handling data objects for BIRT reports requires knowledge of programming using the BIRT reporting API and the report object model. For information about the BIRT reporting API and the report object model, see *Integrating and Extending BIRT*. This chapter describes the additional requirements for generating data objects for reports.

---

## Generating data object elements for BIRT report designs

To generate data object data sources, data sets, and cubes for a BIRT report design, first configure BIRT\_HOME to access the Actuate commercial model API Java archive (JAR) files from Actuate iServer. To accomplish this task, generate a DesignConfig object with a custom BIRT\_HOME path, as shown in the following code:

```
// Create an DesignConfig object.
DesignConfig config = new DesignConfig();
// Set up the path to your BIRT Home Directory.
config.setBIRTHome("C:/Program Files/Actuate11/iServer/Jar/BIRT
/platform");
```

Use the path to the iServer installation specific to your system.

Using this design configuration object, create and configure a Design Engine object, open a new session, and generate or open a report design object, as shown in the following code:

```
// Create the engine.
DesignEngine engine = new DesignEngine(config);
SessionHandle sessionHandle = engine.newSessionHandle(
 ULocale.ENGLISH);
ReportDesignHandle designHandle = sessionHandle.createDesign();
```

These objects are contained in the model API package `org.eclipse.birt.report.model.api`.

The `ElementFactory` class supports access to all the elements in a report. The following code generates an `Element Factory` object:

```
ElementFactory factory = designHandle.getElementFactory();
```

To generate data sources, data sets, and cubes, use the `datamart` methods of an `ElementFactory` object: `newDataMartCube( )` for a new cube, `newDataMartDataSet( )` for a data set, and `newDataMartSource( )` for a new data source. For example, to instantiate a new data source, use the following code:

```
DataMartDataSourceHandle dataSource =
 factory.newDataMartDataSource("Data Object Data Source");
```

Associate a handle for a data object data source with an actual data source from the contents of a data or data design file. For example, to associate a data source handle with a data source from `test.datadesign`, use the following code:

```
dataSource.setDataMartURL("test");
dataSource.setAccessType(
 DesignChoiceConstants.ACCESS_TYPE_TRANSIENT);
```

Finally, add the data element to the report design, as shown in the following code:

```
designHandle.getDataSources().add(dataSource);
```

To complete the data source assignment, output the report design into a file and close the design handle object, using code similar to the following:

```
FileOutputStream fos = new FileOutputStream("output.rptdesign");
designHandle.serialize(fos);
// Close the document.
fos.close();
designHandle.close();
```

The resulting output file, `output.rptdesign`, contains the new data source, retrieved from `test.datadesign`. This data source appears in `Data Sources` in `Data Explorer` and establishes a link to the `.datadesign` file, `test.datadesign`. The XML source for `output.rptdesign` includes markup similar to the following lines:

```
<datamart-node location="file:/MyProject/test.datadesign">
...
<data-sources>
 <data-mart-data-source name="Data Object Data Source" id="7">
 <property name="datamartURL">test</property>
 <property name="accessType">transient</property>
 </data-mart-data-source>
</data-sources>
```

When exporting this report design to an Encyclopedia volume, also export `test.datadesign` to maintain the reference to the data source.

## Creating data object data sets for BIRT report designs

To create a data object data set, use the `newDataMartDataSet()` method from `ElementFactory`. For example, to instantiate a new data set, use the following code:

```
DataMartDataSetHandle dataSet =
 factory.newDataMartDataSet("Data Set");
```

Associate the data object data cube with a `DataMartDataSourceHandle` object and then add the name of a data set from the data or data design file. For example, to access a data set called "SetName", use the following code:

```
dataSet.setDataSource(dataSource.getName());
dataSet.setDataObject("SetName");
```

`DataMartDataSetHandle` inherits the `setDataSource()` method from `DataSetHandle`.

Finally, add the data element to the report design, as shown in the following code:

```
designHandle.getDataSets().add(dataSet);
```

## Creating data object data cubes for BIRT report designs

To create a data object data cube, use the `newDataMartDataCube()` method from `ElementFactory`. For example, to instantiate a new data cube, use the following code:

```
DataMartDataCubeHandle dataCube =
 factory.newDataMartDataCube("Data Cube");
```

Associate the data object data cube with a `DataMartDataSourceHandle` object and assign a data cube from the data or data design file. For example, to access a data cube called "CubeName", use the following code:

```
dataCube.setDataSource(dataSource.getName());
dataCube.setDataObject("CubeName");
```

Finally, add the data element to the report design, as shown in the following code:

```
designHandle.getDataCubes().add(dataCube);
```

---

## Tutorial 5: Creating a data element using the Design Engine API

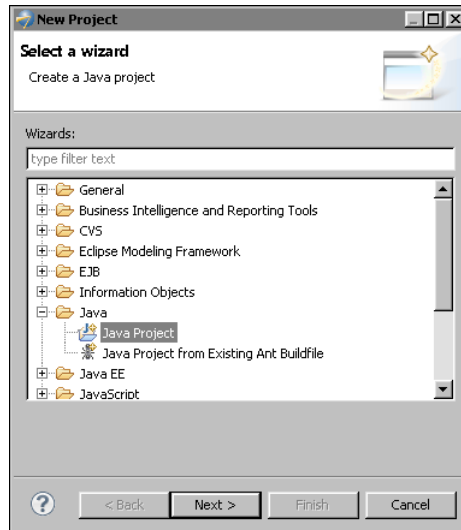
This tutorial provides step-by-step instructions for creating a Java class that generates a BIRT report design with a BIRT data source generated from a BIRT data design file. You perform the following tasks:

- Set up a project.
- Create a GenerateDataObject Java class.
- Create the main( ) method to test the code.
- Run the code.

## Task 1: Set up a project

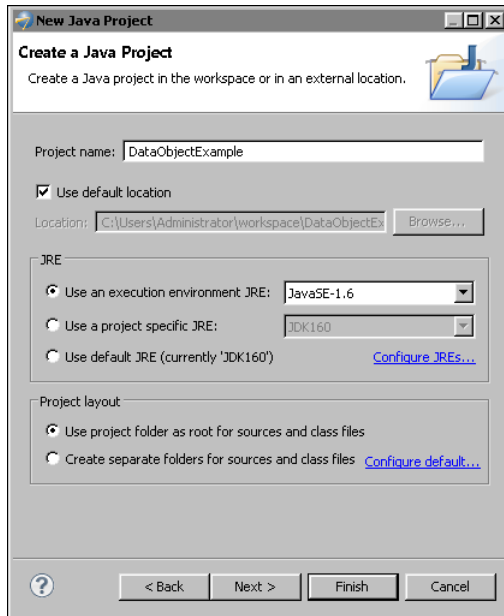
To compile a Design Engine API application, the design engine Java archive (JAR) files from Actuate iServer must be in your classpath. You can find the design engine JAR files in the <Actuate home>/iServer/Jar/BIRT/lib directory folder. The main JAR files that contain the design engine classes are coreapi.jar and modelapi.jar files. In addition, you need a data design file from which to generate the data objects. For this tutorial, the data design file is include.datadesign.

- 1 In Java perspective, select File→New→Java Project. New Project appears, as shown in Figure 31-1.



**Figure 31-1** Creating a new project

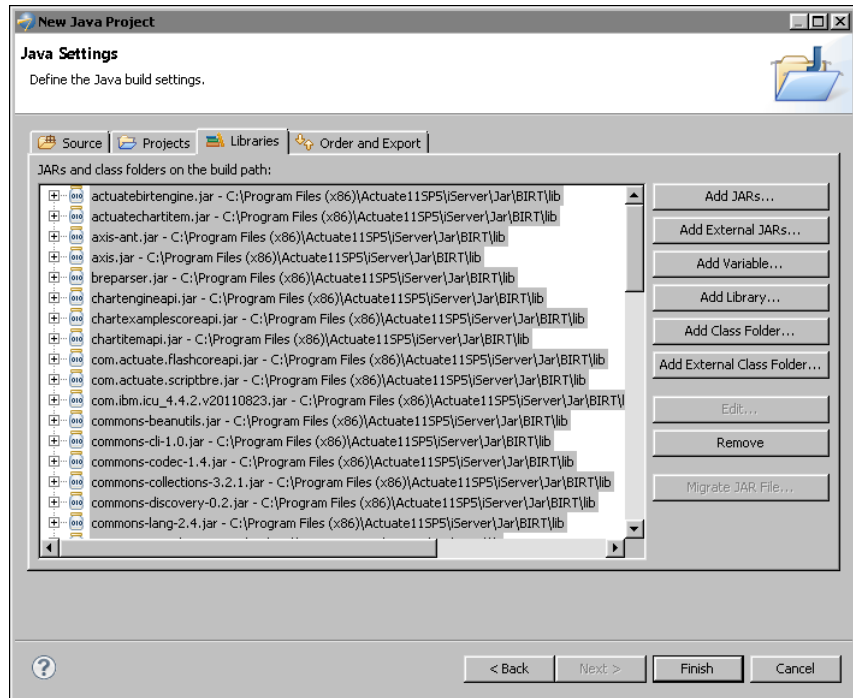
- 2 Expand Java, select Java Project, and choose Next. New Java Project appears, as shown in Figure 31-2.



**Figure 31-2** Creating the DataObjectExample project

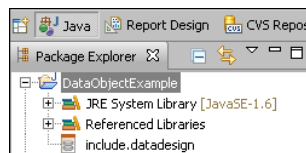
- 3 In Project Name type:  
DataObjectExample
- 4 In Project layout, select:  
Use project folder as root for sources and class files
- 5 Choose Next. Java Settings appears.
- 6 Set the project build path.
  - 1 Select the Libraries tab.
  - 2 Choose Add External JARs.
  - 3 In JAR Selection, navigate to the iServer\Jar\BIRT\lib directory. For the default installation of BIRT on Windows XP, this directory is:  
C:\Program Files\Actuate11\iServer\Jar\BIRT\lib
  - 4 In JAR Selection, select all of the JAR files in the directory.
  - 5 Choose Open. The libraries are added to the classpath as shown in Figure 31-3.
  - 6 Choose Finish.





**Figure 31-3** DataObjectsAPI project build path

- 7 Import the data design file.
  - 1 In the Package Explorer, right-click the DataObjectExample project.
  - 2 Choose Import from the context menu.
  - 3 In Import, choose General►File System and then choose Next.
  - 4 In File System, choose Browse.
  - 5 Navigate to and select a data design file. Then choose Finish. The data design file appears in the project as shown in Figure 31-4.

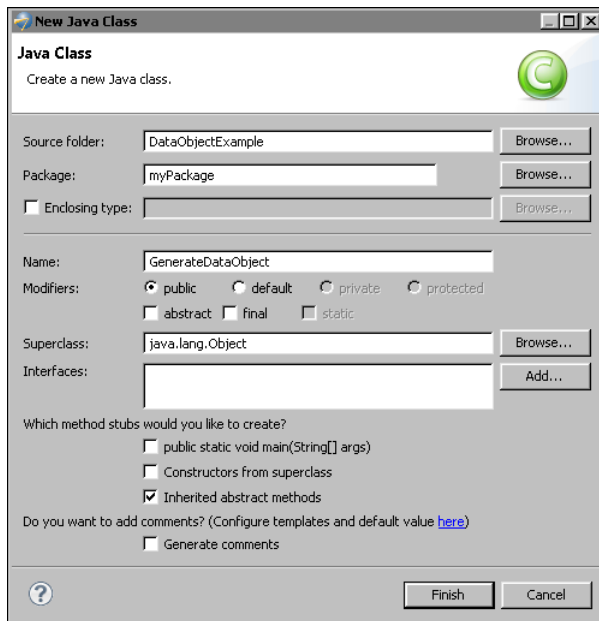


**Figure 31-4** DataObjectExample project showing the data design file

## Task 2: Create a GenerateDataObject Java class

This Java class creates a simple report design, with table, list, and image elements.

- 1 Choose File→New→Class. New Java Class appears.
- 2 In Name type:  
GenerateDataObject
- 3 In Package, as shown in Figure 31-5, type:  
myPackage



**Figure 31-5** Creating a GenerateDataObject class

- 4 Choose Finish. GenerateDataObject.java opens in the Java editor.
- 5 Add a BIRT\_HOME static variable to the class. For the default installation of iServer on a 32-bit Windows system, use the following line in the body of the GenerateDataObject class body:

```
private static final String BIRT_HOME = "C:/Program Files(x86)
/Actuate11sp5/iServer/Jar/BIRT/platform";
```

## Task 3: Create the main( ) method to test the code

Add a main( ) method to run the class.

- 1 Type the following main method:

```
public static void main(String[] args) throws Exception
{
}
```

An error indicating that the `BirtException` class is not defined appears.

- 2 Use Quick Fix (Ctrl+1) to import the `BirtException` class definition.
- 3 Add the main method body shown in Listing 31-1 to your `main()` method.

**Listing 31-1**     `main()` method code

---

```
DesignConfig config = new DesignConfig();
config.setBIRTHome(BIRT_HOME);

DesignEngine engine = new DesignEngine(config);
SessionHandle sessionHandle = engine.newSessionHandle(
 ULocale.ENGLISH);
ReportDesignHandle designHandle = sessionHandle.createDesign();
ElementFactory factory = designHandle.getElementFactory();

DataMartDataSourceHandle dataSource =
 factory.newDataMartDataSource("Data Source");
dataSource.setDataMartURL("include");
dataSource.setAccessType(
 DesignChoiceConstants.ACCESS_TYPE_TRANSIENT);
designHandle.getDataSources().add(dataSource);

FileOutputStream fos = new FileOutputStream("test.rptdesign");
designHandle.serialize(fos);
fos.close();

designHandle.close();
System.out.println("Done");
```

Read the code explanations:

- To access a data source and its contents, the application must first generate and configure a design engine object.
- After creating the engine object, the code instantiates a new session. The `SessionHandle` object manages the state of all open data and report designs. Use `SessionHandle` to open, close, and create data designs, and to set global properties, such as the locale and the units of measure for data elements. Create the session handle only once. BIRT supports only a single `SessionHandle`.
- Generate a new design handle using the `SessionHandle` object. Create a design engine element factory using the `DesignHandle` object.
- Create a new instance of `DataMartDataSourceHandle` and set the datamart URL to the name of a datamart file, `include`, which corresponds to the

include.datadesign file added to the project. Then, configure the access type and add the data source handle to the design handle object.

- Finally, open a file output stream to a report design, test.rptdesign, that uses the data object. Export the data design element to the report design.

#### 4 Add the import statements shown in Listing 31-2 to the beginning of the file.

##### **Listing 31-2** import statement code

---

```
import java.io.FileOutputStream;
import org.eclipse.birt.core.exception.BirtException;
import org.eclipse.birt.report.model.api.DesignConfig;
import org.eclipse.birt.report.model.api.DesignEngine;
import org.eclipse.birt.report.model.api.ElementFactory;
import org.eclipse.birt.report.model.api.ReportDesignHandle;
import org.eclipse.birt.report.model.api.SessionHandle;
import org.eclipse.birt.report.model.api.elements
 .DesignChoiceConstants;
import com.actuate.birt.report.model.api
 .DataMartDataSourceHandle;
import com.ibm.icu.util.ULocale;
```

## **Task 4: Run the code**

- 5 Create a Run configuration for GenerateDataObject.java class.
  - 1 In Package Explorer, select:  
GenerateDataObject.java
  - 2 From the main menu, choose Run→Run Configurations.
  - 3 Double-click the Java Application link in the left frame of Run Configurations. The GenerateDataObjects configuration gets created.
  - 4 Choose Run. Save and Launch appears. Choose OK.
- 6 After the execution completes, refresh the contents of the DataObjectExample project. test.rptdesign appears.
- 7 Open the report design and view the XML source. The XML contains a datamart element that points to include.datadesign and a data source called include, as shown in the following code:

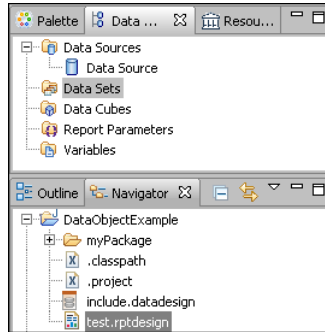
```
<datamart-node
 location="file:/DataObjectExample/include.datadesign">
...
<data-sources>
 <data-mart-data-source name="Data Source" id="4">
 <property name="datamartURL">include</property>
```

```

 <property name="accessType">transient</property>
 </data-mart-data-source>
</data-sources>

```

- 8 In Data Explorer, expand Data Sources to view the new data source, as shown in Figure 31-6.



**Figure 31-6** Data Source in test.rptdesign

The final code for GenerateDataObject is shown in Listing 31-3.

### Listing 31-3 GenerateDataObject.java

```

package myPackage;
import java.io.FileOutputStream;
import org.eclipse.birt.core.exception.BirtException;
import org.eclipse.birt.report.model.api.DesignConfig;
import org.eclipse.birt.report.model.api.DesignEngine;
import org.eclipse.birt.report.model.api.ElementFactory;
import org.eclipse.birt.report.model.api.ReportDesignHandle;
import org.eclipse.birt.report.model.api.SessionHandle;
import org.eclipse.birt.report.model.api.elements
 .DesignChoiceConstants;
import com.actuate.birt.report.model.api.DataMartCubeHandle;
import com.actuate.birt.report.model.api.DataMartDataSourceHandle;
import com.ibm.icu.util.ULocale;

public class GenerateDataObject {

 private static final String BIRT_HOME =
 "C:/Program Files/Actuate11/iServer/Jar/BIRT/platform";

 public static void main(String[] args) throws Exception
 {
 DesignConfig config = new DesignConfig();
 config.setBIRTHome(BIRT_HOME);
 }

```

```

DesignEngine engine = new DesignEngine(config);
SessionHandle sessionHandle =
engine.newSessionHandle(ULocale.ENGLISH);
ReportDesignHandle designHandle = sessionHandle.createDesign();
ElementFactory factory = designHandle.getElementFactory();

DataMartDataSourceHandle dataSource =
factory.newDataMartDataSource("Data Source");
dataSource.setDataMartURL("include");
dataSource.setAccessType(DesignChoiceConstants
.ACCESS_TYPE_TRANSIENT);
designHandle.getDataSources().add(dataSource);

FileOutputStream fos = new FileOutputStream("test.rptdesign");
designHandle.serialize(fos);
fos.close();

designHandle.close();
System.out.println("Done");
}
}

```

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