



IBM WebSphere Commerce Version 5.4

Reporting Integration Guide
for Brio Enterprise™ Software

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First Edition (May 2002)

This edition applies to version 5.4 of IBM® WebSphere® Commerce (Program 5724 - A18) and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Introduction

Overview of the integration kit

For WebSphere Commerce sites, managers require in-depth analytical information of their business. This analytical data has to be captured periodically from the WebSphere Commerce database, based on the business relevance, specific business models and requirements. The data is then presented as reports satisfying the specified criteria.

Third party reporting tools like Brio Enterprise, can connect to WebSphere Commerce databases, build custom queries and generate reports based on query results. You can customize existing reports or introduce new reports consistent with your business needs. The generated reports are accessible through a WebSphere Commerce Accelerator interface, giving the user a single point of access.

This integration guide describes how Brio Enterprise can be used in the WebSphere Commerce environment to design, schedule, and publish custom reports. It contains step-by-step instructions to connect the WebSphere Commerce database with Brio Enterprise, create and customize reports, publish and schedule reports. Further, it explains how to integrate the generated reports with WebSphere Commerce and access them from WebSphere Commerce Accelerator.

The integration kit provides a set of ready to use reports that match the WebSphere Commerce Schema. These samples can be used as-is, modified or as a template for new reports.

Who should read this book?

Managers

- To understand the benefits of integrating Brio Enterprise with WebSphere Commerce
- To understand and gain an overview of this integration and how it relates to other WebSphere Commerce components

Administrators

- To maintain the shared or integrated environment between WebSphere Commerce and Brio Enterprise
- To set up access control policies
- To schedule and monitor report publishing

Report developers

- To create, publish and schedule reports

Objectives

The objectives of the integration kit are:

- Help WebSphere Commerce customers understand the capabilities of this integration
- Walk through the integration procedures
- Learn to create and customize reports using BrioQuery Designer
- Learn to schedule and publish reports

Note:

You can begin with the sample reports provided with the integration kit.

Components

The following components are used to integrate Brio Enterprise with WebSphere Commerce.

1. Brio Enterprise

Brio Enterprise version 6.2 includes client and server components. BrioQuery Designer, Brio Navigator and Brio Explorer will act as client components while Brio Broadcast Server and Brio OnDemand Server are at the server side. In this case, the BrioQuery Designer and the Brio Broadcast Server will be used to customize reports. You may choose other combinations to meet your business needs.

2. BrioQuery Designer

BrioQuery Designer is an interactive report design tool. It connects to a database where raw data is hosted. The user can use it to design and test queries, create tables and charts, and finally design reports by assembling the results.

The actual report designed can be registered as a 'report request' job on the Brio Broadcast Server and processed at predefined schedules.

3. Brio Broadcast Server

The Brio Broadcast server will run 'report request' jobs and publish results through different means and locations based on the respective settings. It can send the results through e-mail, to a web server (local or ftp), or as a Brio Report on a local file system. Multiple BrioQuery Designers or users can share a single Brio Broadcast Server.

A report can be scheduled to run daily, weekly, monthly, or based on a default or customized calendar. It can also be triggered by events.

Terminology

Connection file

A connection file is required for the BrioQuery document to use any database. The connection file (.oce) captures and stores connection information such as the application program interface software, the database software, the address of your database server, and your database user name.

Limit

Since unfiltered data can be many gigabytes on a server, limits make your final data set more efficient and manageable by filtering out unnecessary information. Limits also refine the scope of your reports. You can see in the Limit line, which Items in your data set are limited. Although you may have the same Item on both Limit and Request lines, they are independent of each other. You do not have to request an Item to limit it, or vice versa. You can apply limits in the Query or Results sections. In the Query section, the database filters out limited values before the data reaches your desktop. In the Results section, limited values are excluded from the display, but remain in the data set. In the Results section they are called local limits.

Query

A relational query is a request to a database server for information. It is constructed of columns that are selected from tables in a database. When you create a query, you ask the database to return an answer to a specific question. The results set is the answer to your question.

Variable limits

Variable limits give you the option to change the value of a specified limit at runtime. This allows you to generate multiple reports with a single query by setting different values for the limits of that query.

Chapter 2. Pre-requisites

This section covers the hardware and software pre-requisites necessary to integrate BrioQuery Designer and Brio Broadcast Server with WebSphere Commerce.

Hardware

The integration can be implemented on a single Windows machine from where the WebSphere Commerce database and HTTP file systems are accessible. The Brio Broadcast server can be accessed from several machines that are installed with the client software - BrioQuery Designer.

Note:

Refer to the Brio release note for minimal hardware requirements

Software

The following software is necessary:

- WebSphere Commerce Version 5.4 Business Edition or Professional Edition either on Windows NT[®], Windows 2000[®], AIX[®] or the Solaris[®] operating environment
- BrioQuery Designer and Brio Broadcast Server version 6.2 or later

Brio users are required to have the WebSphere Commerce database (DB2 or Oracle) access privilege. A separate DB2 or Oracle database is recommended for the job repository. If this is the case, then a database license (DB2, oracle, SQL Server or other databases that Brio supports) is essential for the Brio repository.

Planning

Before installing and configuring the BrioQuery Designer and the Brio Broadcast Server, make a checklist to avoid any confusion during configuration.

Use the following checklist to plan the integration:

- Identify where the BrioQuery Designer and Brio Broadcast Server will be installed
- Identify where the Brio repository database will reside
- Identify the DBMS system that will host the repository database
- Identify how to connect to the WebSphere Commerce database and access the HTTP server directory

- Identify the administrator(s) of the Brio repository database and Brio Broadcast Server
- Identify the user ID and password that is used to process queries on the WebSphere Commerce database
- Identify the query and report designers who need access to the WebSphere Commerce and the Brio Repository databases

Note:

For this sample integration the following were installed on a Windows based machine:

- WebSphere Commerce database
- Brio Repository (*Briorepo*)

The following were installed on another Windows based machine:

- BrioQuery Designer
- Brio Broadcast Server

Installing WebSphere Commerce ensures the installation of the IBM HTTP Server

DB2 version 7.2 was the RDBMS used. The administrator for WebSphere Commerce and Brio Enterprise was the same person.

Chapter 3. Architecture and workflow

Figure 1 describes the architecture for WebSphere Commerce and Brio configuration. You can customize the architecture to suit your needs but the workflow will remain the same.

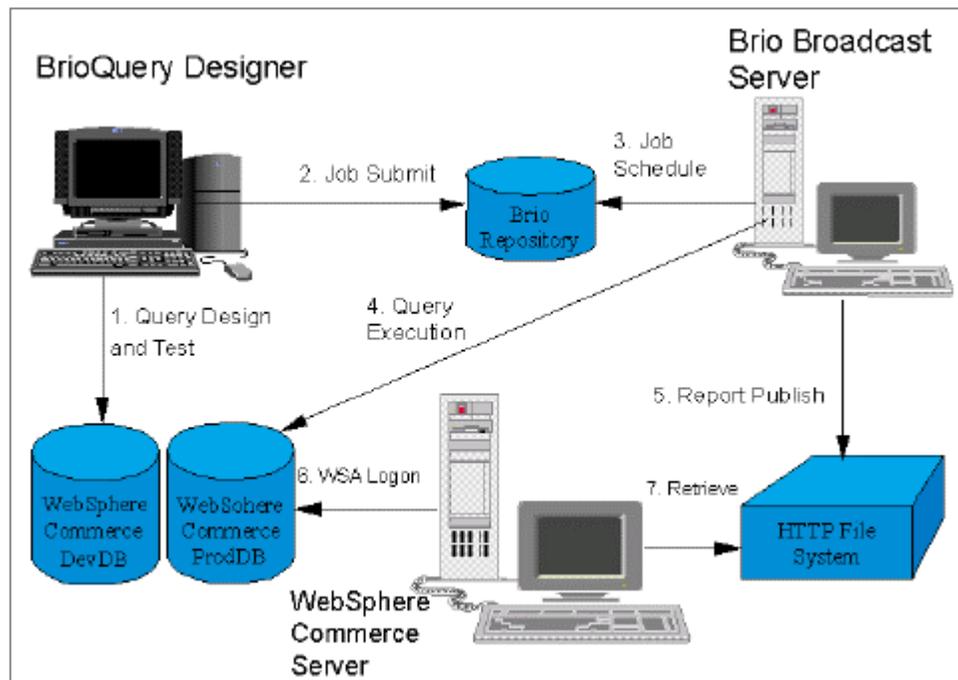


Figure 1: Logical view of the architecture

This is the basic workflow to create a report and have it run automatically at scheduled times:

1. Design and test the report using the BrioQuery Designer that is connected to the WebSphere Commerce database
2. Submit and schedule the report-request job using Brio Broadcast Server
3. Reschedule the job from the Brio Server Administration Console, if necessary
4. When scheduled, the Brio Broadcast Server executes the report query on WebSphere Commerce database and generates the report
5. The Brio Broadcast server publishes the report to the WebSphere Commerce file system or to any other directory you specify
6. The WebSphere Commerce administrators access the reports through WebSphere Commerce Accelerator

The Brio Broadcast server and the BrioQuery Designer can be installed on the same machine as the WebSphere Commerce database or any other machine on the network where the WebSphere Commerce database exists.

To create, customize and run a report, the BrioQuery Designer and the Brio Broadcast Server must connect to two databases:

- The WebSphere Commerce database. For example MALL
- The Brio Repository Database. For example, `Briorepo`

BrioQuery Designer

- Uses MALL to design and run queries
- Uses `Briorepo` to register and schedule jobs

Brio Broadcast Server

- Polls requests from `Briorepo`
- Runs the reports on schedule using the connection to MALL

Chapter 4. Creating reports

This section gives you detailed instructions on how to create a report. The steps involved are:

1. Creating an ODBC connection. Refer to Appendix B if you are using DB2; refer to Appendix C for Oracle
2. Installing BrioQuery Designer
3. Configuring BrioQuery Designer
4. Creating a connection document for WebSphere Commerce database
5. Creating a query
6. Limiting a query
7. Sorting results
8. Creating charts

Note:

- MALL is the default database name for WebSphere Commerce
- IRISMALL (as seen in the screenshots in Appendix B) is the database alias of Mall used in this example

Installing the BrioQuery Designer

Use the BrioQuery Designer to design and test queries; create tables and charts for presentation, and finally design reports by assembling the results and charts.

To install the BrioQuery Designer, refer to the *Brio Client Installation Guide*. Ensure that you follow the installation plan. Follow on screen instructions when you run the setup.

Configuring BrioQuery Designer

This section details the steps to configure the BrioQuery Designer. Configuring BrioQuery Designer involves:

- Setting default formats
- Creating a connection document for the WebSphere Commerce database

Setting default formats

After installing the BrioQuery Designer you must set the default formats. Depending on the locale or policy of your company, set default formats for date, currency, number and other conditions.

1. To open BrioQuery Designer from the **Start** menu go to **Programs** and select **BrioQuery Designer**. **Cancel** the Welcome to BrioQuery dialog if you do not have a connection file or a query document created.
2. From the **Tools** menu go to **Options** and select **Default Formats**. The **Detail Fonts and Styles** dialog displays. Check each tab to set the defaults you require. Ensure that everything in the **Numbers** tab meets the requirement of your company. Click **OK** to save the defaults.

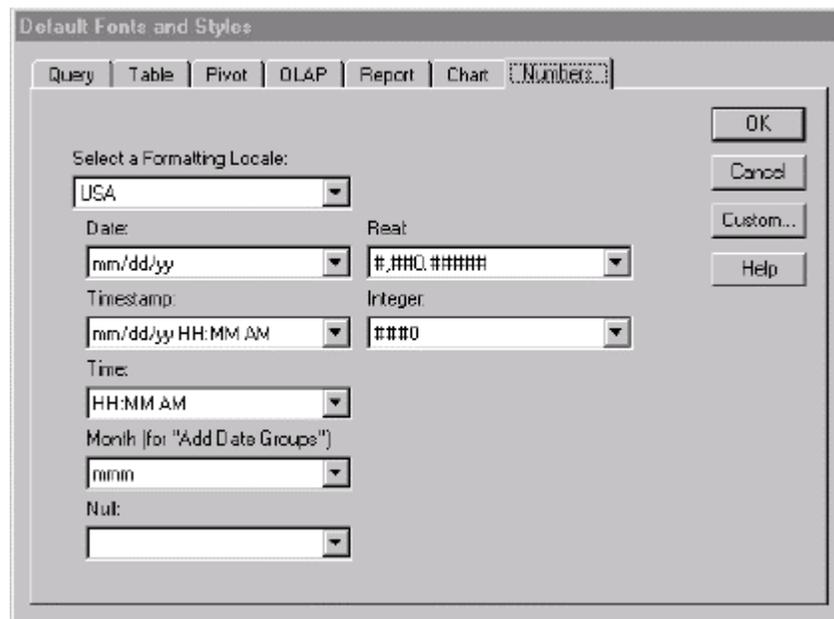


Figure 2: Default fonts and styles

Note:

You can change the font and styles for individual report, or return to change the defaults later.

Creating a connection document for WebSphere Commerce database

Before you create a report you must create a connection document. The BrioQuery designer uses a connection file whenever you connect to a database. Connection files contain the information to log on to a specific database. This includes connection parameters such as the connection software, the database software, the address of your database server, and your database user name.

Before you create a connection document you must complete creating an ODBC connection for the WebSphere Commerce database. Refer to Appendix B. Creating an ODBC connection.

To create the connection document for the WebSphere Commerce database, open the BrioQuery Designer.

1. From the **File** menu select **New**. A new file dialog displays.
2. Select **A New Database Connection File** and click **OK**.

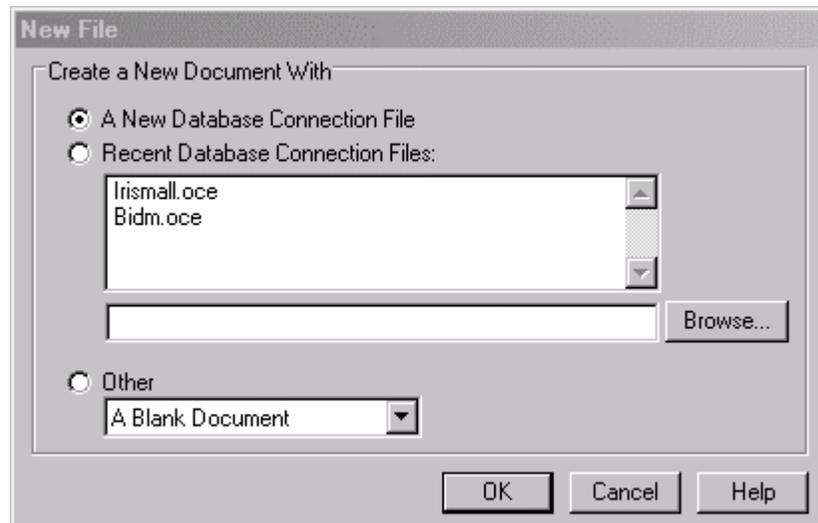


Figure 3: New file dialog

Note:

The dialog box allows you to create a new connection file, or select a database connection file from a menu list. You can also open recent document files. When opening a previously used document, BrioQuery automatically uses the connection file that was used to create the document, provided the connection file has not been moved, renamed, or deleted.

- From the Database Connection Wizard select the connection software and database type. Select the **Prompt for database name** checkbox. Click **Next**.

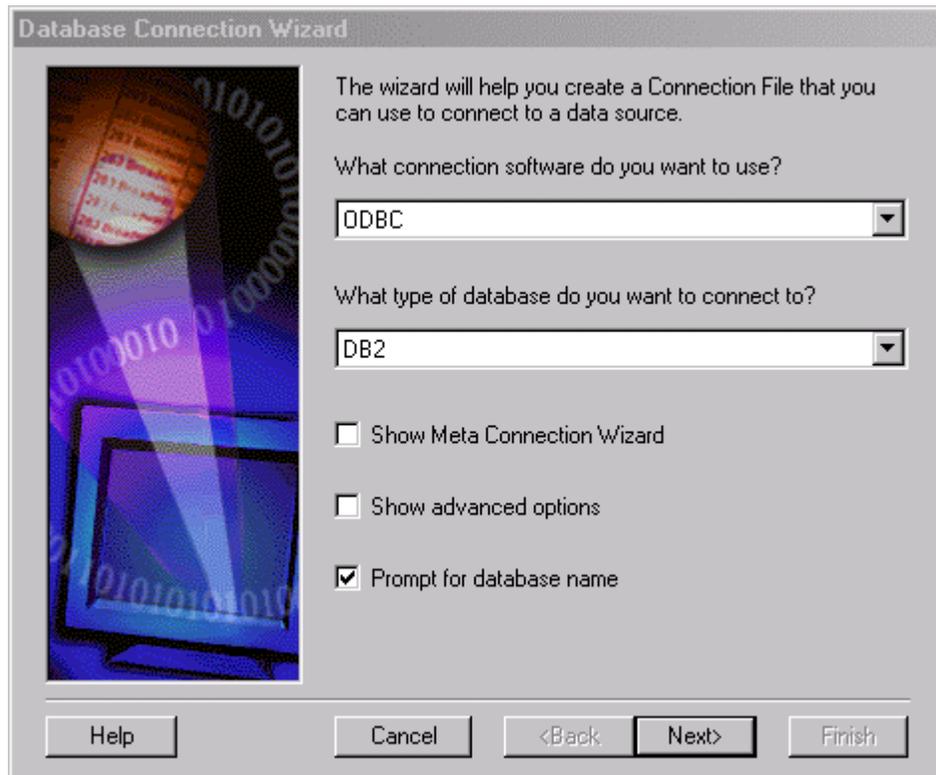


Figure 4: Select connection software and database

- In the next dialog, enter the **User Name** and **Password**. Select the **Host** from the menu. This is the data source (Database alias created during ODBC connection). Click **Next**.
- Select the **Database** Mall from the drop down menu, click **Next** and then **Finish**.
- Save your OCE. By default the file is saved in Brio/Brioquery/programs/open catalog extension folder. This completes the creation of your connection document.

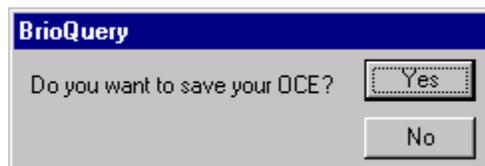


Figure 5: Save OCE dialog

Creating a query

A query is a request for information to a database. Create a database connection and from the appropriate database, select tables of interest from the table list in the catalog pane. These tables are groupings of related data. From a table, you select the specific columns to build the request and add limits, if any. Finally, you process the query by sending a request to the database. The database returns the results for your query.

You can create a query only after the connection document is created. Open the BrioQuery Designer and execute the following steps to create your query.

1. From the New File dialog, select the **Recent Database Connection File** button and choose `Irismall.oce` in this case. From the next drop down menu, select **A Blank Document** and click **OK**.

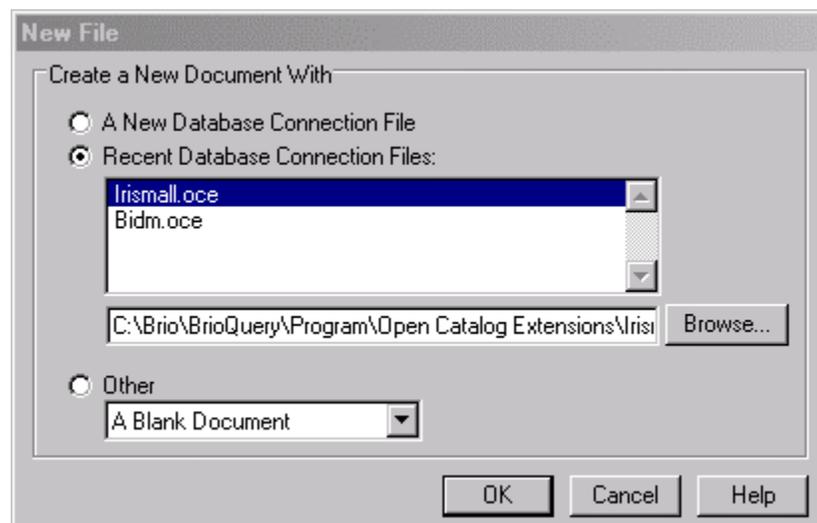


Figure 6: New file dialog

2. Enter the **Host Password** (for `Irismall.oce`) in the pop up and click **OK**. This opens an untitled report.
3. Click on the **Tables** icon in the left pane. The table names are displayed in a tree.

- Select the table for which you want to create a query and double click it. Here, we have selected **Orderitems** and **Catentdesc**. This displays the two tables as shown in Figure 7.

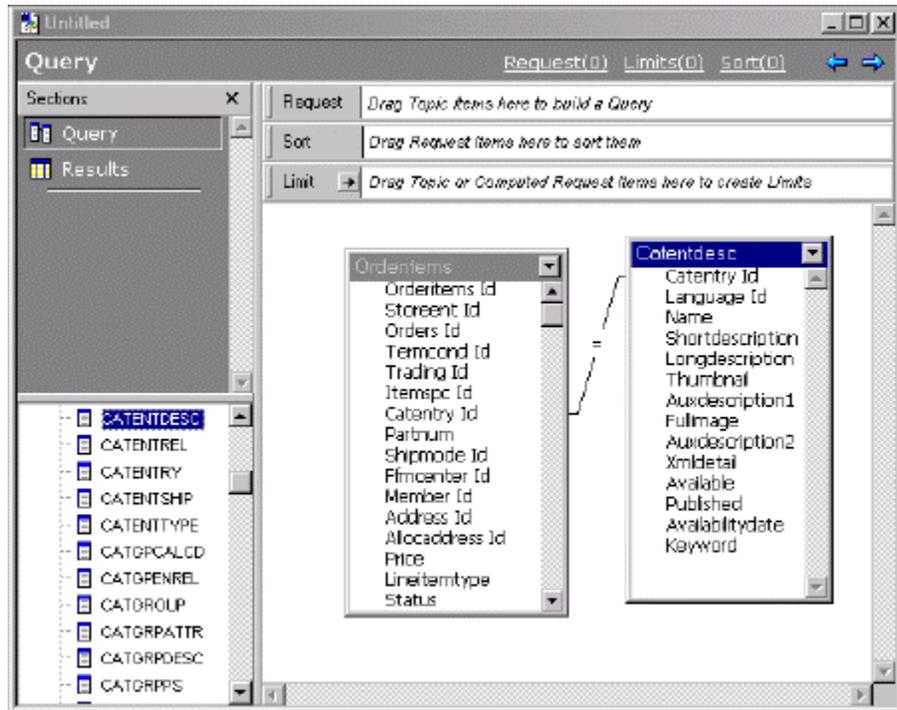


Figure 7: Selecting tables to create queries

- Select the column name for which you want to create the query. Drag and drop it into the **Request** row as shown in Figure 8. Here we have selected **Name** from the Catentdesc table and **Quantity** from the Orderitems table. To remove an item from the **Request** row, select it and then press Delete.



Figure 8: Displaying the column names in the request row

6. Double click on **Name** in the **Request** row. In the **Item Properties** dialog change the column name from Name to **Product** and click **OK** as shown in Figure 9. This will change the column header name from Name to Product in the final report you generate.

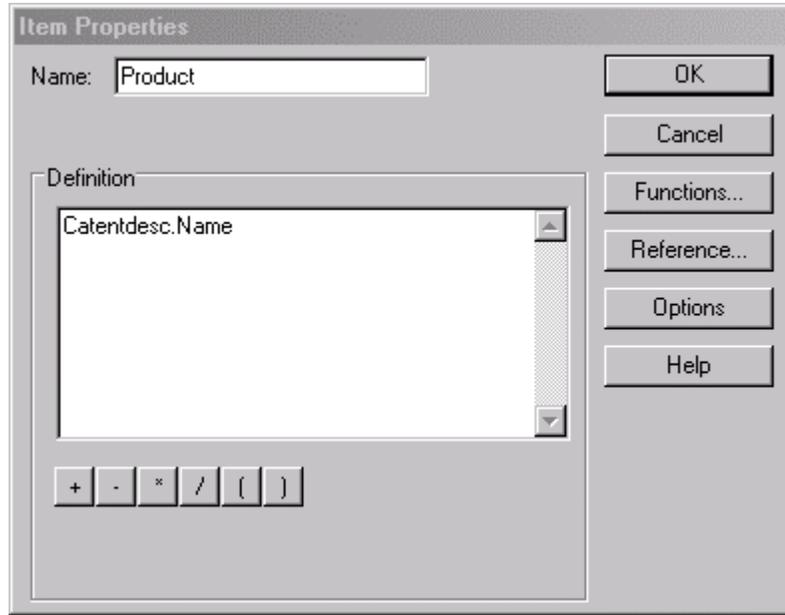


Figure 9: Item Properties dialog

7. Double click on **Quantity** in the **Request** row. In the **Item Properties** dialog change the column name from Quantity to **Units Sold** and click **OK** as shown in Figure 10.

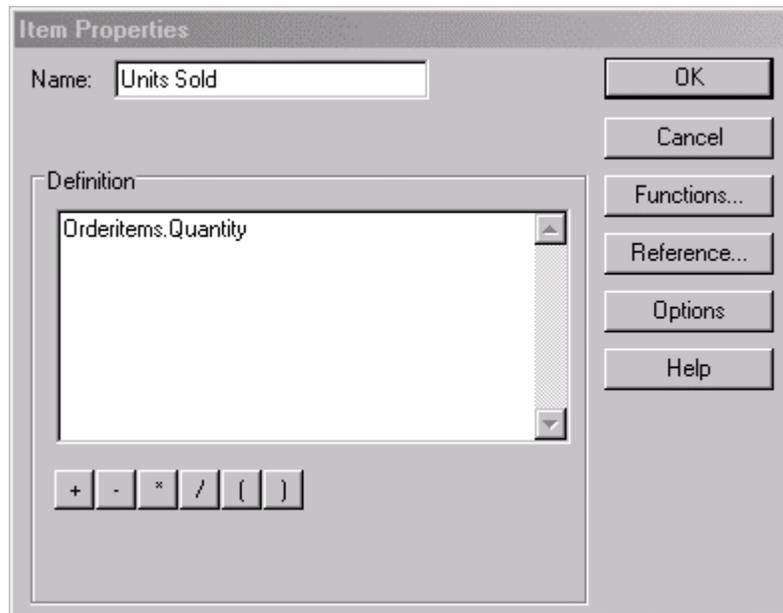


Figure 10: Item properties dialog

Note:

To change other column names follow steps 6 or 7 of this section.

Limiting a query

When building this query, you may not want to see information for every product you sell. Similarly, you probably don't want to see this information for every year the product has been available. You only want to see certain products and certain periods. Limits enable you to narrow your request and exclude the data that you don't need. This way you see only relevant data. For example, you can view only the number of items sold in the last quarter of the current year, as opposed to the whole year.

There are different ways to limit a query. Here we have discussed 3 instances. We have used the following columns from their corresponding tables as limits for this query.

- Storeent ID column from the Orderitems table. This limits the results of your query to a specific store. Ensure that the value of the Storeent ID that you are using is present in the Storeent table of the WebSphere Commerce database
- Language ID column from the Catentdesc table. This limits the results of your query to a specific language. Ensure that the value of the Language ID that you are using is present in the Storelang table of the WebSphere Commerce database
- Lastcreate column from the Orderitems table.

You can set more than one limit and each can be set as either a fixed or a variable limit.

This data in the sample report created here is for the store with a Store entity ID of 10001 and the Language ID as -1, which is English. You can use a different Store entity ID and Language ID to suit your requirements.

Variable limits

Variable limits give you the option to change the value of a specified limit at runtime. This allows you to generate multiple reports with a single query by setting different values for the limits of that query.

Here we have enabled the variable limit option for Storeent ID and Language ID. Thus, the query created here can be used to generate reports for a different store and language.

Fixed limits

Fixed limits will retain the value you assign to them at all times. When processing your query, you cannot change the value of this limit.

For example, if you set the Storeent ID as a fixed limit, the query created here will generate reports using the same store.

Note:

If the Limit row is not visible, click on the **Limit** link below the tool bar as shown in Figure 11.



Figure 11: Limit link

Execute the following steps to limit your query:

1. Select the **Storeent ID** column from the **Orderitems** table. Drag and drop it into the **Limit** row as shown in Figure 12. This limits your query to a specific store.

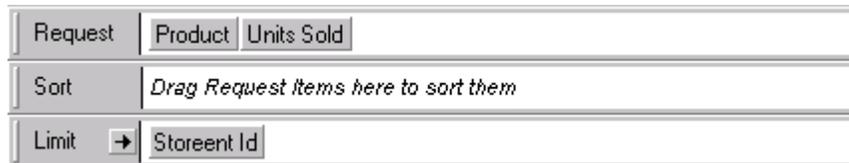


Figure 12: Limit row

- a. From the Limit: Storeent ID dialog, click on **Custom Values** and enter the **10001** as your Storeent ID. Click **OK**. The Storeent ID is the identity of the store used in this report.

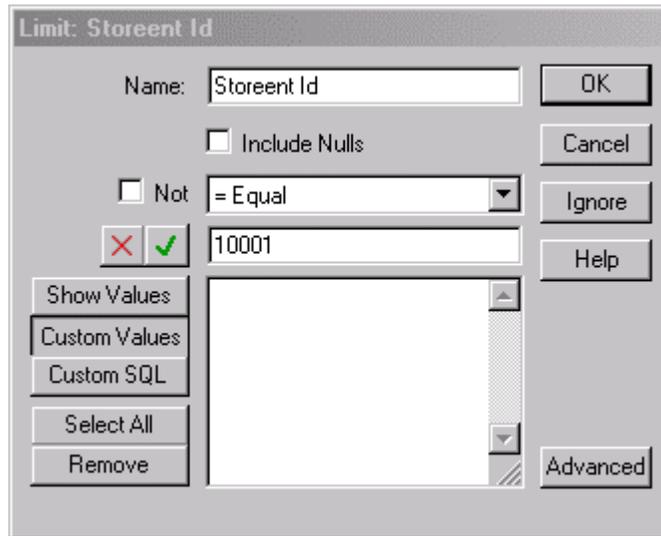


Figure 13: Limit: Storeent ID dialog

2. Select the **Language ID** column from the **Catentdesc** table. Drag and drop it into the **Limit** row. This limits your query to a specific language, as shown in Figure 14.

Request	Product	Units Sold
Sort	<i>Drag Request Items here to sort them</i>	
Limit	→ Storeent Id	AND □ Language Id

Figure 14: Setting the Language ID limit

- a. From the Limit: Language ID dialog click on **Show Values**. Select **-1** as your Language ID. Click **OK**. The language ID specified here is English.

Figure 15: Limit: Language ID dialog

- b. To enable the variable limit option for the Storeent ID limit, select **Storeent ID** from the **Limit** row. Right click and then select **Variable Limits** from the options provided. Repeat this to enable the variable limit option for **Language ID** and for any other limits you require.

When scheduling this query, the Brio Broadcast Server will ask for the values of the variable limits to process this query. Refer to Chapter 6. Publishing reports, steps 6 to 9. To generate a report using the same query for a different store and language, specify the relevant language ID.

3. Select the **Lastcreate** column from column from the **Orderitems** table. Drag and drop it into the **Limit** row.
4. In the Limit: Lastcreate dialog there are 5 options by which you can limit your query. Here, we have selected the **Custom SQL** as examples.
 - a.  From the Limit: Lastcreate dialog, click **Custom SQL**. You must enter your query limit manually and click **OK**.

(The limit shown in Figure 16 is designed to display only the creation of products completed in the current year.)

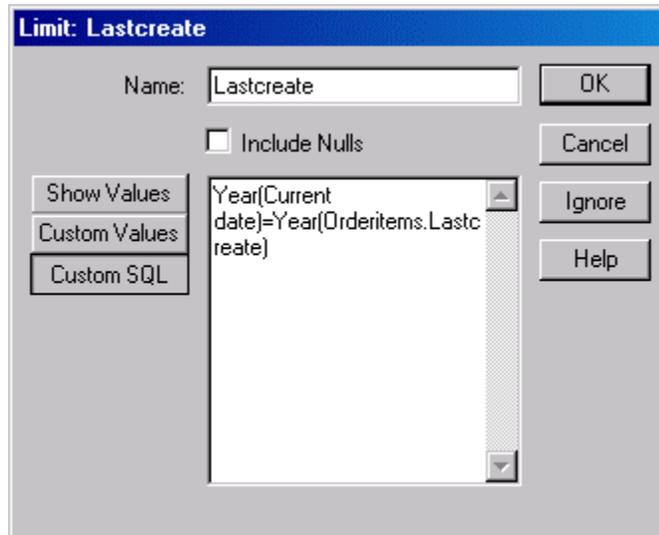


Figure 16: Limit: Lastcreate – Custom SQL dialog

Oracle From the Limit: Lastcreate dialog, click **Custom SQL**. You must enter your query limit manually and click **OK**. (The limit shown in Figure 17 is designed to display only the creation of products completed in the current year.)



Figure 17: Limit: Lastcreate – Custom SQL dialog

- b. To view the results of the above query, click on **Process** from the tool bar. The results of the query created in step 4a. will be displayed as seen in Figure 18.

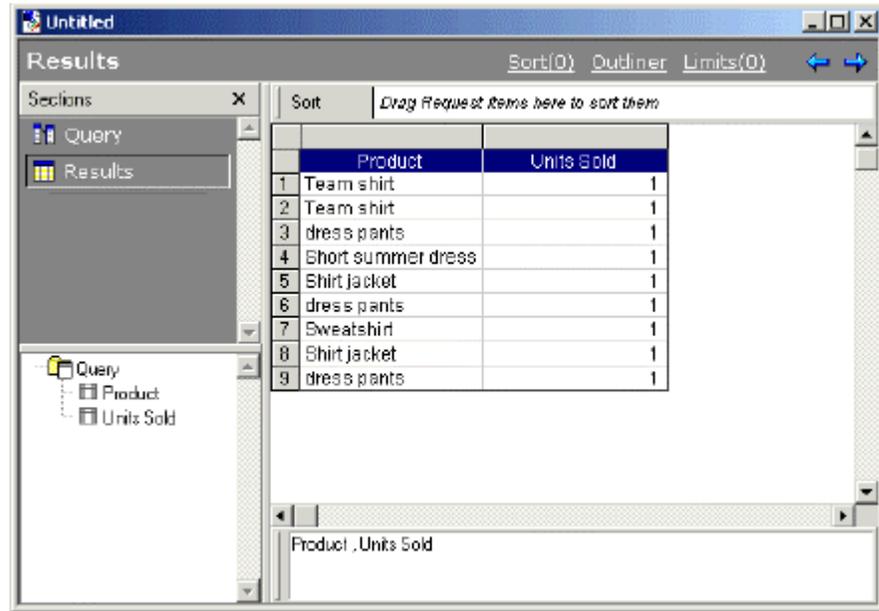


Figure 18: Custom SQL - query results window

5. If you want to create another query, click on the **Query** tab in the Results window to return to the BrioQuery Designer main window. Repeat the steps given above.

Sorting results

The sort function is used to present your results in a particular order, for example, ascending or descending order. The default sort setting is **Ascending**. If the Sort row is not visible, then click on the **Sort** link below the tool bar. Refer to Figure 11.

1. In the Results window, drag and drop **Products** from the tree in the lower left pane into the **Sort** row. Note that the names in the Product column as shown in Figure 18 are not in any particular order.
2. Right click on **Product** in the **Sort** row and select the order you want to sort it in. Click on **Process** in the main tool bar to view the results.

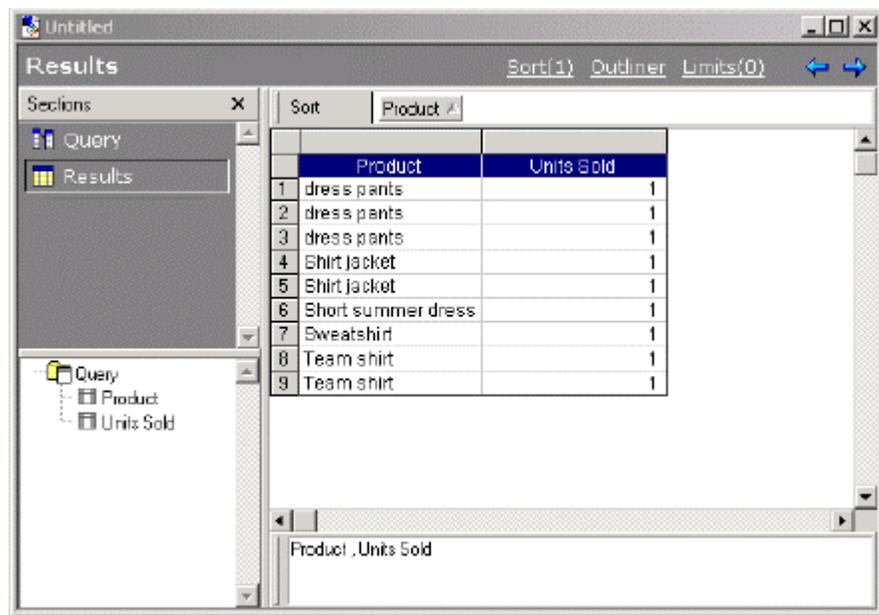


Figure 19: Sort – Custom SQL sort results

Creating charts

1. From the **Insert** menu select **New Chart**. This displays the **Chart** tab in the left pane.
2. From the **Results (Query)** tree in the lower left pane, drag and drop:
 - a. The **Units Sold** into **Y-Facts** in the lower right pane.
 - b. The **Products** into the **X-Categories** in the lower right pane. This displays the chart as shown in Figure 21.

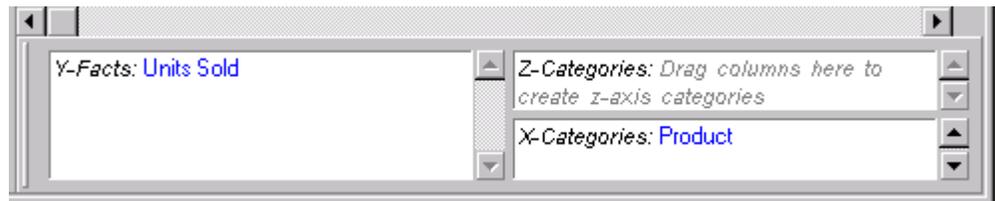


Figure 20: Displaying the Y-Facts and X-Categories

Note:

The Y-Facts and X-Categories is equivalent to the x and y axis used in graphs.

3. To give your chart a title, double click **Chart** and enter your title in the pop up. Click **OK**. This generates the title of the chart as seen in Figure 21.

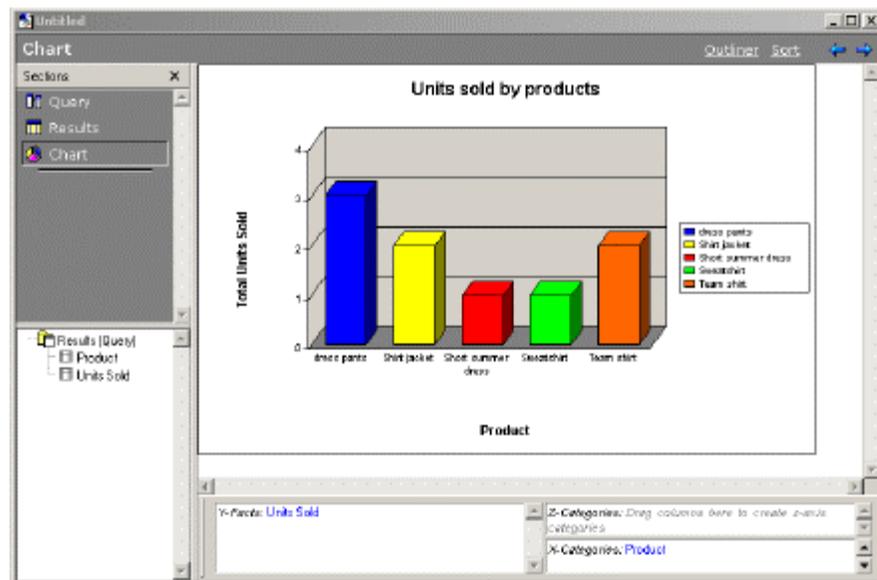


Figure 21: Units sold by products chart

4. To save the report select **Save** from the **File** menu. Enter the file name and click **Save**.

Chapter 5. Configuring Brio Broadcast Server

To configure the Brio Broadcast server from the **Start** menu go to **Programs, Brio Enterprise Server** and select **Server Administrator**.

1. From the Brio Enterprise Server Administrator pop up, click on **Broadcast Server**.
2. From the **Edit** menu select **Preferences** to configure your preferences for the report you are generating.
 - a. In the Preferences window, move to the **File Locations** tab.

- i) Browse and point the **Connections Directory** to the *Brio install directory\BrioQuery\Program\Open Catalog Extensions*.

Browse and point the **Working Directory** to *Brio install directory\Program Files\Brio\Brio Enterprise Server\temp*.

Browse and point the **BrioQuery Executable File** to *Brio install directory\BrioQuery\Program\BrioQry.exe*.

Browse and point the **Server Executable File** to *Brio install directory\Brio Enterprise Server\Program\ BQServer.exe*

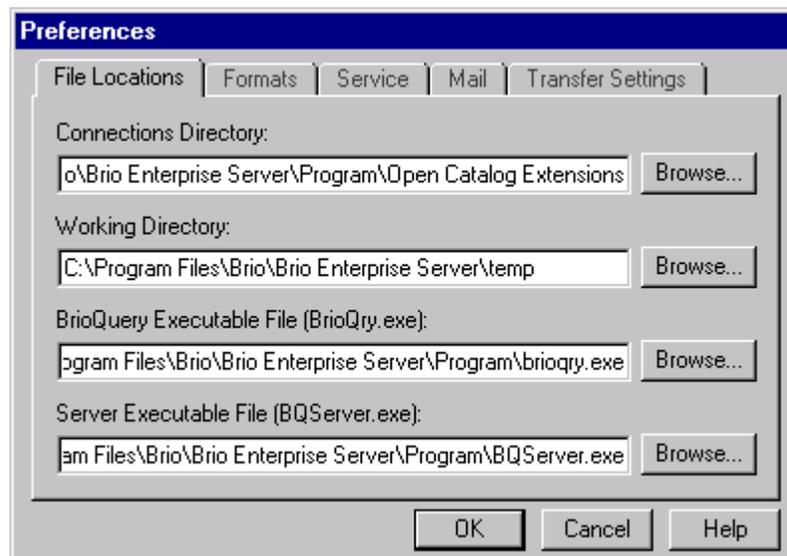


Figure 22: File Location preferences to configure Brio Broadcast Server

- b. Move to the **Formats** tab and set your preferences.
 - i) Select a **Formatting Locale** from the drop down menu.

- ii) Select the **Date**.
- iii) Select the **Timestamp**.
- c. Move to the **Service** tab and enter your **Server Name**, which is the machine name where the Brio Broadcast Server is installed.
- d. Move to the **Mail** tab to view the default selection.
- e. Move to the **Transfer Settings** tab.
 - i) The **IP Address** or the server name (The machine name where Brio Broadcast Server is installed) displays by default.
 - ii) The **Port Number** appears by default. Click **OK**.

Execution of the above steps completes configuring your Preferences.

- 3. In the Brio Enterprise Server Administrator click **Add Connection** to select the connection file for the Brio Broadcast Server.

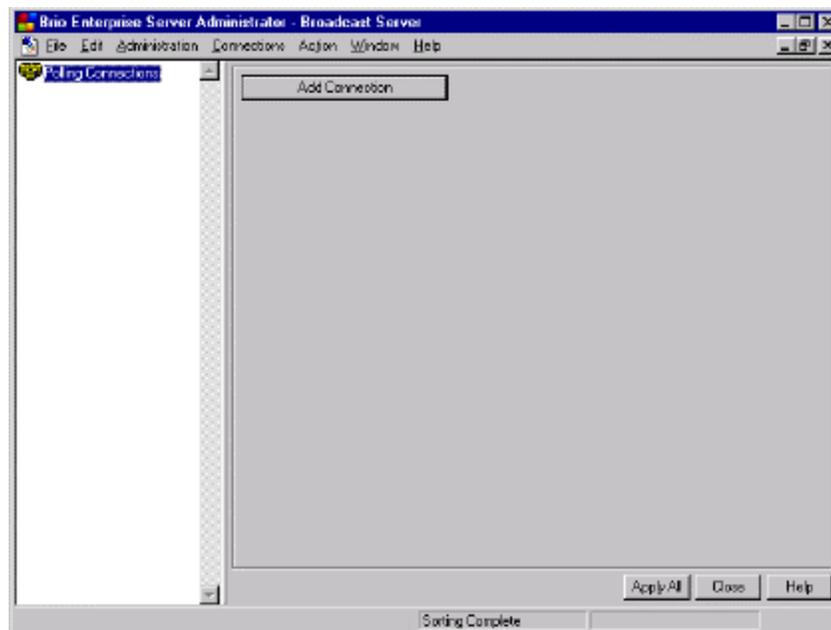


Figure 23: Enterprise server administrator - adding a connection

- a. Before you select a connection file for the Brio Broadcast Server you need to create an empty Brio database. Refer to Appendix A. Creating the Brio repository database.
- b. Create an ODBC connection for the new database. Refer Appendix B. Creating an ODBC connection.
- c. Create a connection file for this database. Follow the steps from the section, Creating a connection document for WebSphere Commerce database. When you reach step 5, select the Briorepo database you created from the dropdown menu and continue.

4. Select your connection file and click **Open**. In this case it is `Briorepo.oce`. This is the connection file that is used to connect to the Brio database.

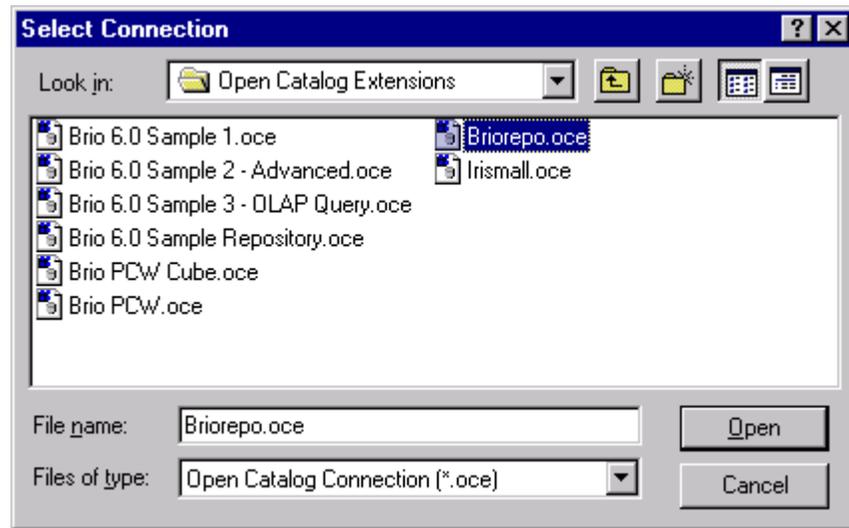


Figure 24: Selecting Brio connection file

5. Enter the **Host User Name** and **Host Password** and click **OK**. For example, `db2admin`. A pop up will convey that there are No Broadcast Server repository tables found in this database. Click **OK**

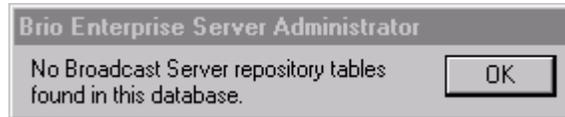


Figure 25: No repository tables message

6. From this screen click on **Create Repository**.

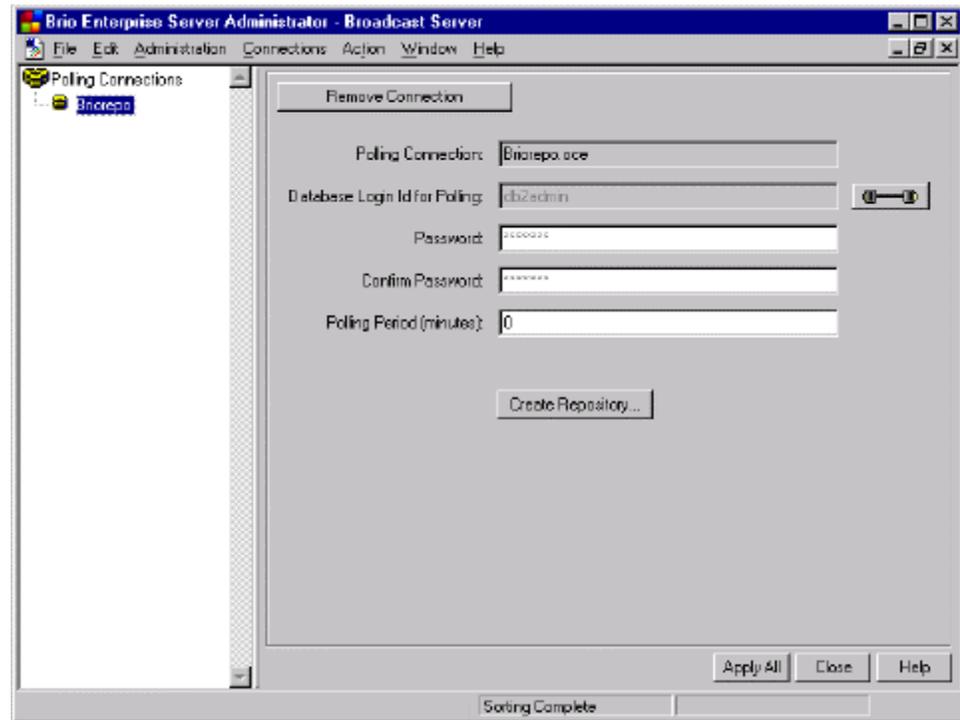


Figure 26: Creating repository tables

- a. In the Create All dialog enter Briorepo as the **Database Name**. Enter the **Owner Name**, which is the WebSphere Commerce database schema name. Check the **Grant Tables to Public** check box and click **Create All** as seen in Figure 27.

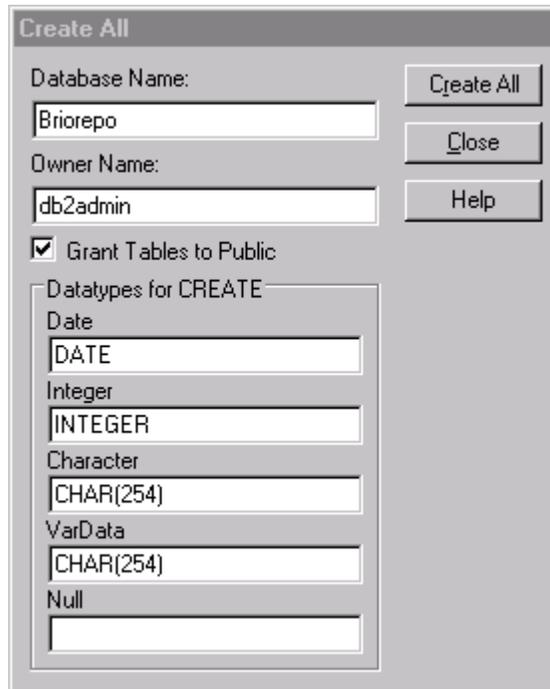


Figure 27: Create All dialog

- b. Click **OK** to the Tables Created message.



Figure 28: Tables created message

- c. Select the **Repository Owner** name, which is the WebSphere Commerce database schema name. For example the Mall database schema name, db2admin. Click **OK**.

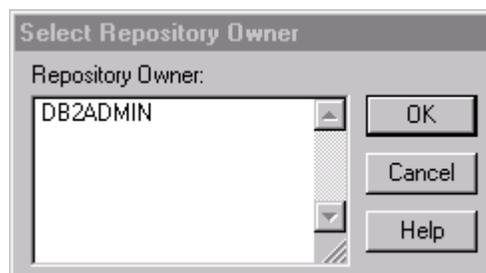


Figure 29: Select Repository Owner

- d. Select **Yes** for this new server message.

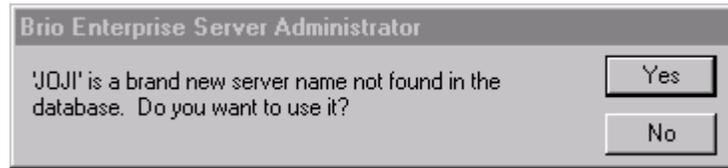


Figure 30: Using a brand new server

- e. Click **Close** to close the Create All dialog.
7. Change the **Polling Period** to more than zero minutes. For example, 2 minutes as shown in Figure 31.

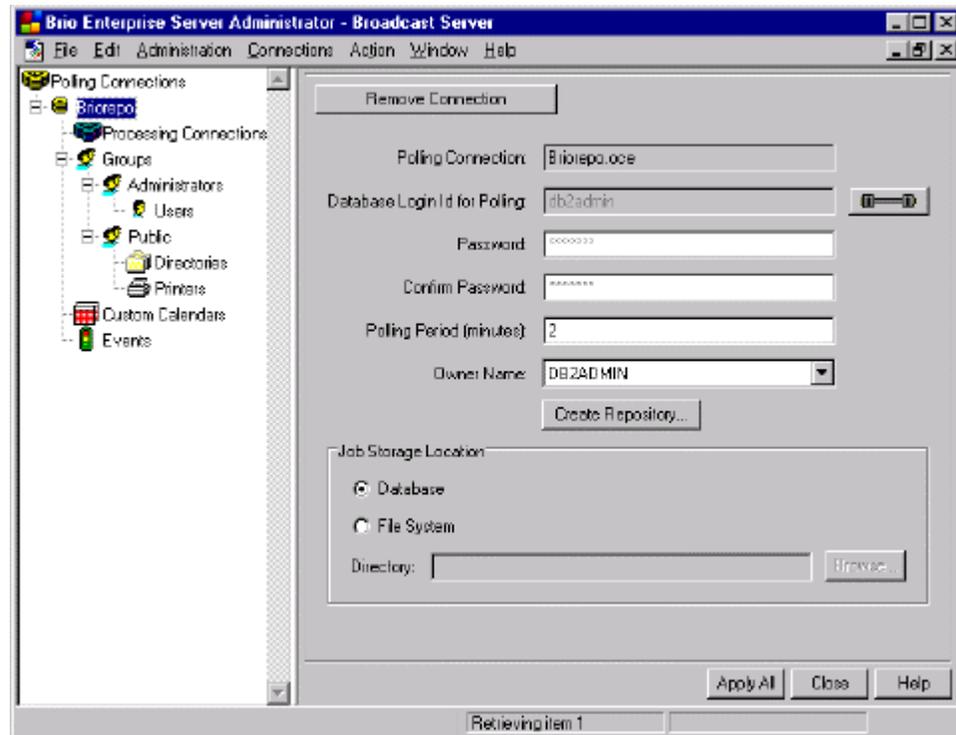


Figure 31: Changing the polling period

- a. Select the **Owner Name** as db2admin, which is the repository owner name created in step 6c.
- b. Select **Database** as the Job Storage Location.
- c. Select **Processing Connections** from the left pane. Click on **Add Processing Connection**.

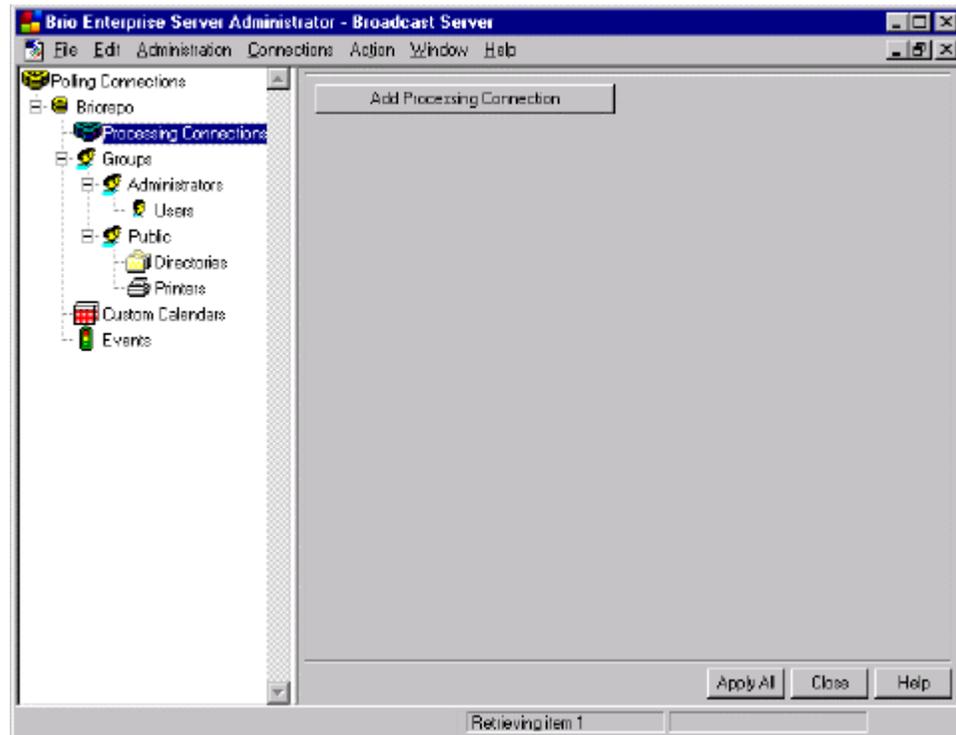


Figure 32: Add processing connection

- d. Browse to select the path to your connection file. In this case it is `Irismall.occ` (Open catalog Extensions file) created for the WebSphere Commerce database, Mall.
8. In the left pane from **Groups** select **Administrators** and then **Users**. Click on **Add Users** in the right pane as shown in Figure 33.

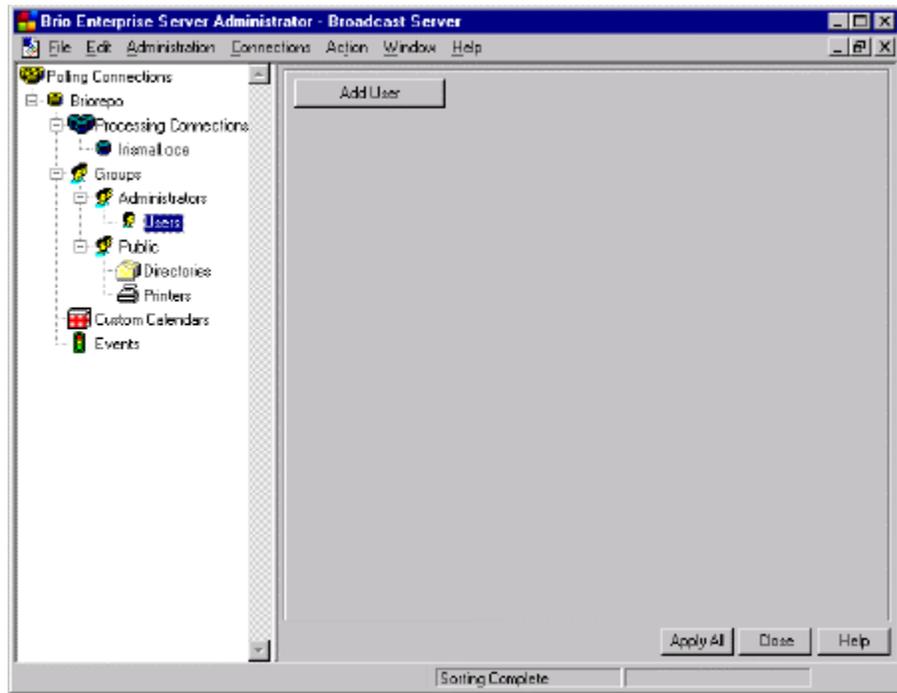


Figure 33: Adding users

9. Enter the **Database Login ID** and **User Name**. For example db2admin.
10. Select **Public** from the tree in the left pane and then **Directories**. Click on **Add Directory**. This specifies the directory where the published reports are placed.

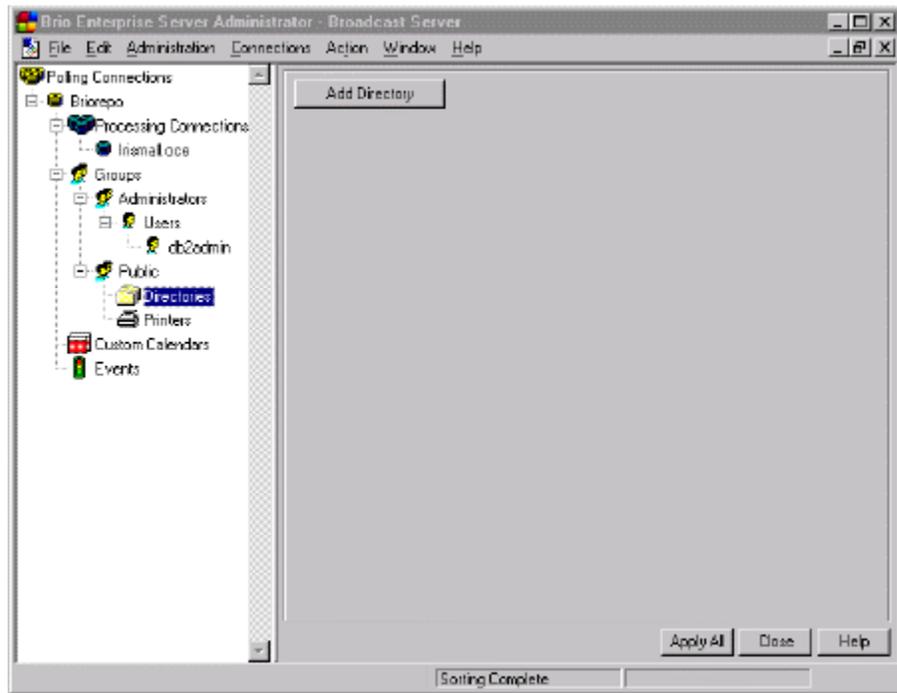


Figure 34: Adding a directory

11. In the following window as shown in Figure 35 enter:

- a. The **Directory Alias** where you want to publish the reports. For example Test.
- b. Enter the **Directory Path** C:\websphere\ibm\httpserver\htdocs\brioreports. Click **Apply All**. This displays the directory alias in the tree.

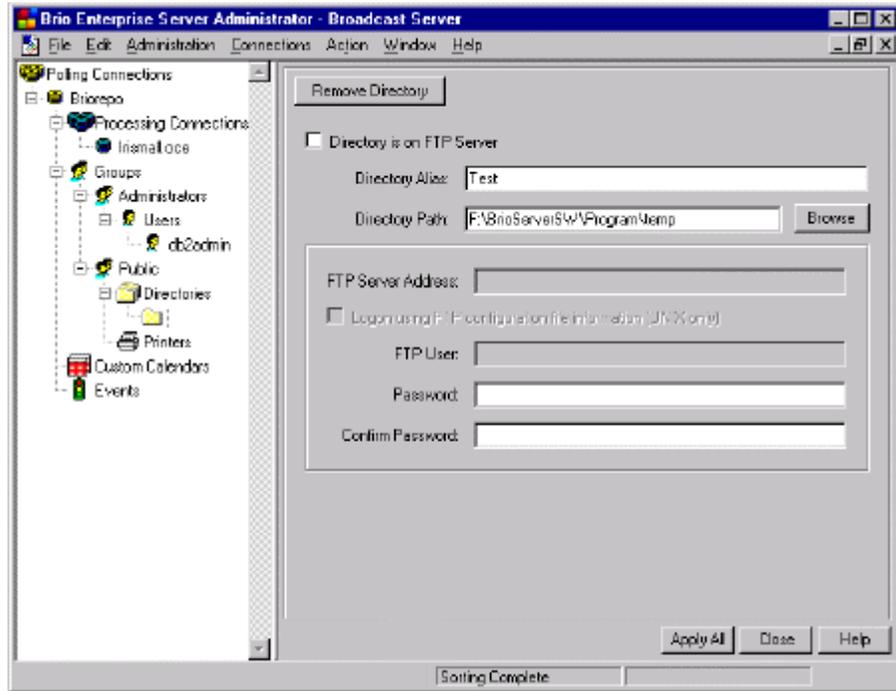


Figure 35: Creating the directory alias

Creating a custom calendar

You can create a customized calendar depending on your company or business needs. When publishing reports you can use this calendar to set the dates to publish your reports.

12. Select **Custom Calendar** from the tree in the left pane and click **Add Calendar**.

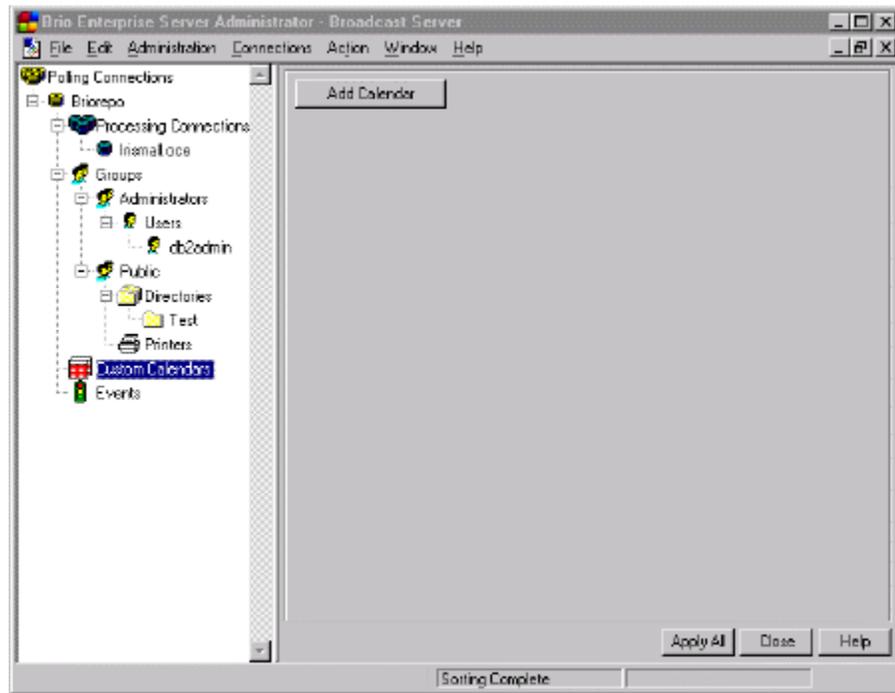


Figure 36: Creating a custom calendar

13. Enter the **Custom Calendar Name** and click **Add Year** to select the year for which you want to create the calendar.

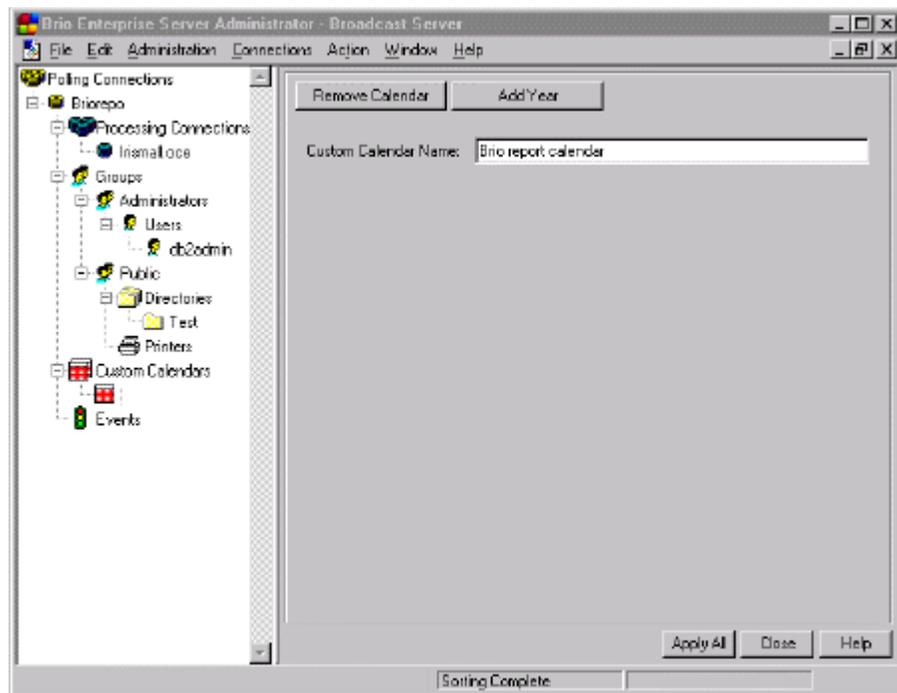


Figure 37: Naming the custom calendar

14. Enter the **Quarterly Start Dates** in column and row 1. These are the customized dates depending on your business requirements. Press the Tab key to automatically fill in the dates in the other fields.

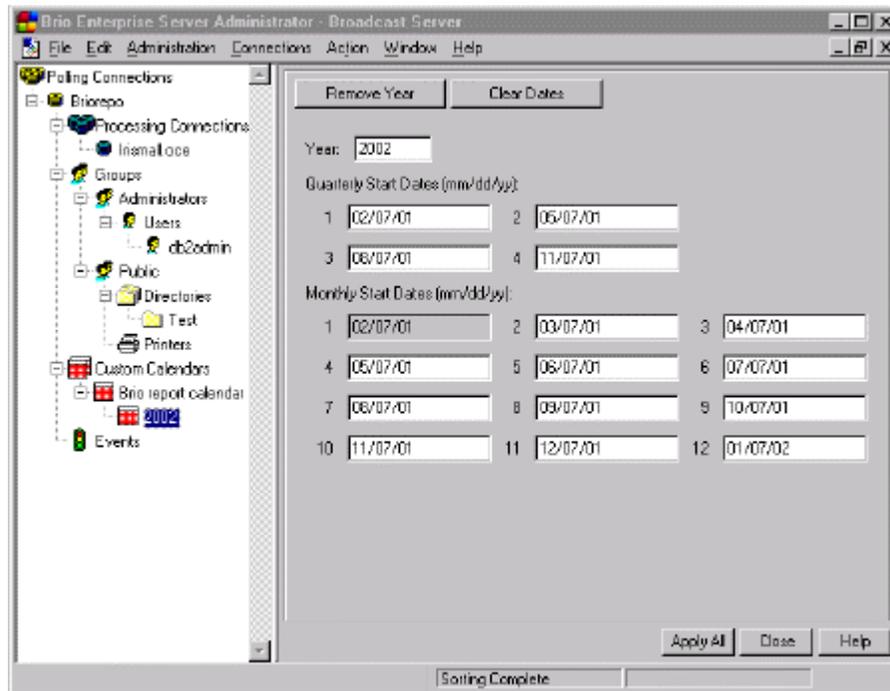


Figure 38: Entering dates for the custom calendar

15. Click **Apply All**. This completes configuring the Brio Broadcast Server.

Chapter 6. Publishing reports

After you complete configuring the Brio Broadcast Server you are ready to publish your report. Publishing the report from the BrioQuery Designer involves the following steps.

From the BrioQuery Designer open your query file.

1. From the **Tools** menus go to **View Job List**, **Select** and choose **Briorepo.oco**.
2. Enter the **Host Password**, which is db2admin in this case. Click **OK**.
3. If you have published reports earlier the Job Information list displays the list of published reports. To add a new job click on **Add Job**.

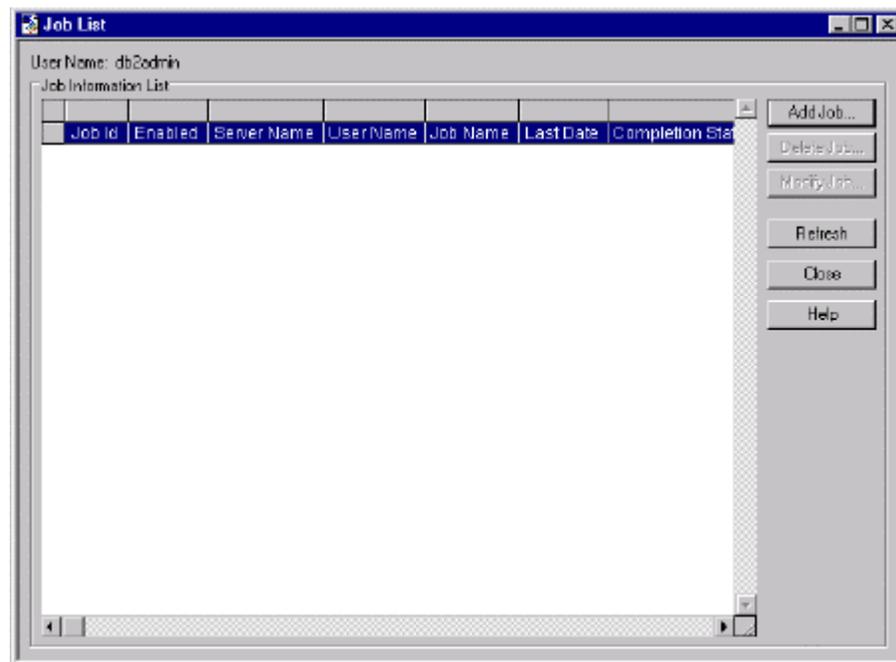


Figure 39: Job List

4. Open the query file that you want to publish

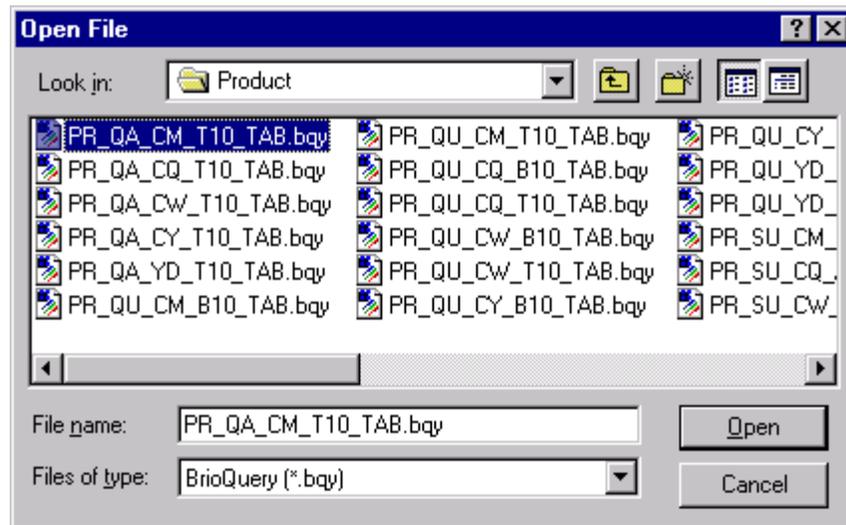


Figure 40: Opening the query file

5. In the Job Detail dialog complete the following:
 - a. Move to the **General** tab as shown in Figure 41.
 - i) The server will assign the **Job ID**.
 - ii) The **User name** is db2admin in this case.
 - iii) Enter the **Job Name**, which is the name of your query file. For example PR_QA_CM_T10_TAB.
 - iv) The **Last Date** and **Next Date** will be listed automatically only if the job is scheduled. In this case they will not be listed, as the job is being published the first time.
 - v) From the drop down menu select your **Calendar** (regular or customized). For example, Brio report calendar.
 - vi) Select the **Server Name**, which is the machine name where the Brio Broadcast server is installed.

Job Detail

General | Queries | Actions | Schedule

Enabled

Job Id: (will be assigned)

User Name: db2admin

Job Name: PR_QA_CM_T10_TAB

Document: PR_QA_CM_T10_TAB.bqy

Last Date:

Next Date:

Calendar: (Regular)

Server Name: JOJI

Send e-mail notification upon completion?

Address:

Check Name Address Book

Reload... OK Cancel Help

Figure 41: Job Detail – general tab

- b. Move to the **Actions** tab as shown in Figure 42.
- c. Click on **Add Action**.

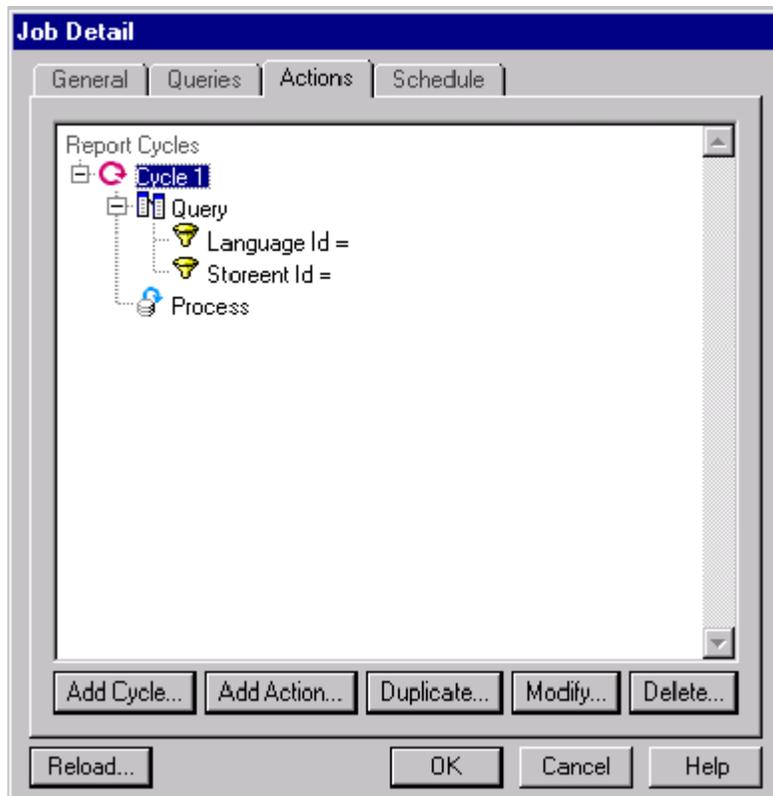


Figure 42: Job detail – Actions tab

- i) In the Action dialog uncheck the **Append Job ID** check box.

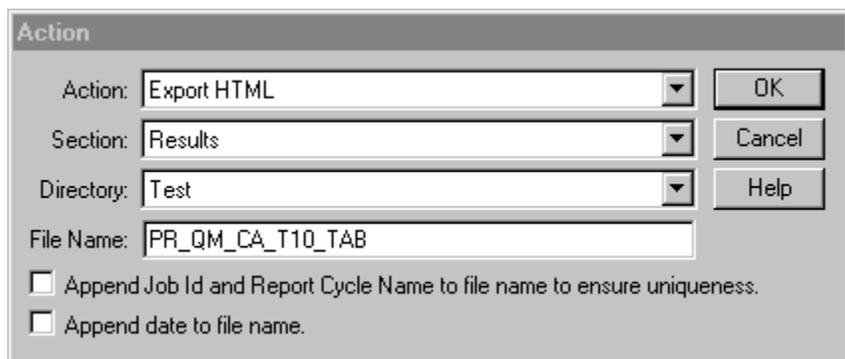


Figure 43: Job detail -creating a results section

- ii) In the **Action** field, from the drop down menu select the Export HTML option. This will publish the results of your query in HTML format.
- iii) In the **Section** field select the Results option. This will display the results of your report in tabular format.
- iv) Select the **Directory** alias where the published reports will be stored. For example, Test directory.

- v) Enter the **File Name** that you want to assign to the results of your query. Here we have used PR_QA_CM_T10_TAB, which is the name of the query file. Therefore the results will be published in the file PR_QA_CM_T10_TAB.htm.
 - vi) Click **OK**. This completes the action details required to publish your report.
- d. To view the scheduled jobs move to the **Actions** tab. Your report is listed under Process.

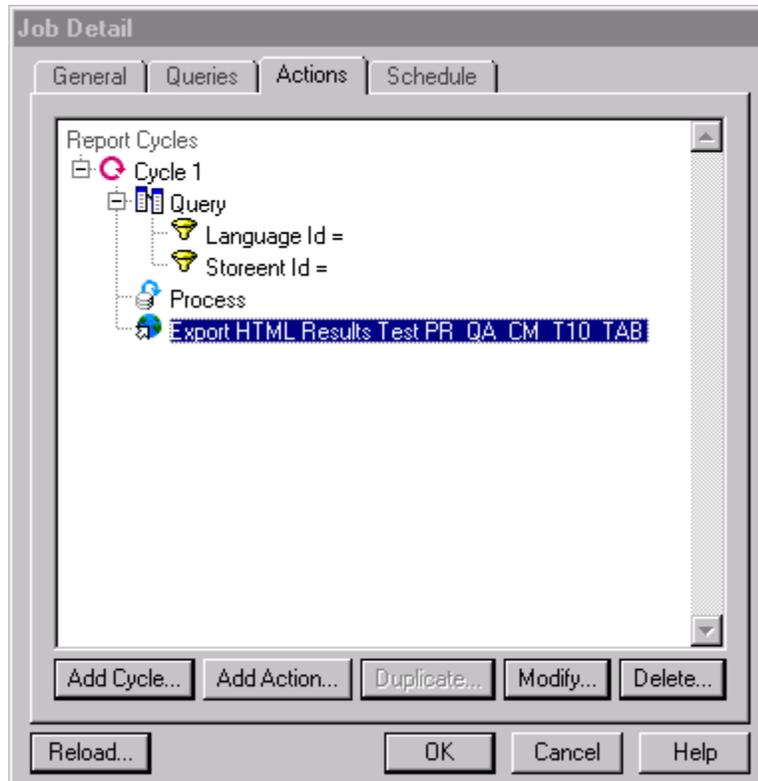
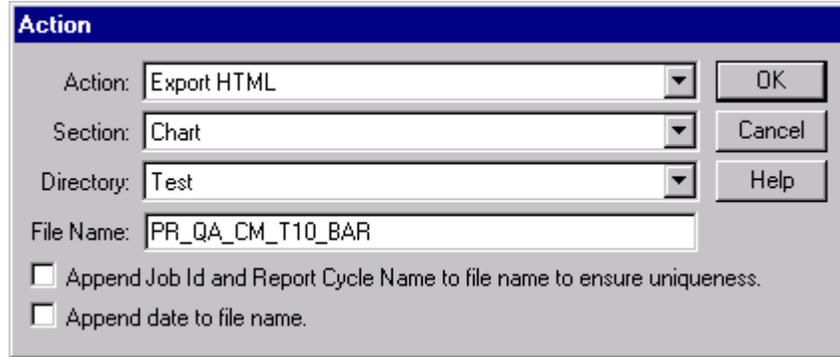


Figure 44: Actions dialog displaying the scheduled job

- e. If you want to view the results of your query as a chart, click **Add Action** from the Job Detail dialog.

- i) In the Action dialog, select the **Chart** option from the Section field. Change the **File Name** that you want to assign to the results of your query. Uncheck the **Append Job ID** checkbox. Do not change any other details. Click **OK**.



Action

Action: Export HTML

Section: Chart

Directory: Test

File Name: PR_QA_CM_T10_BAR

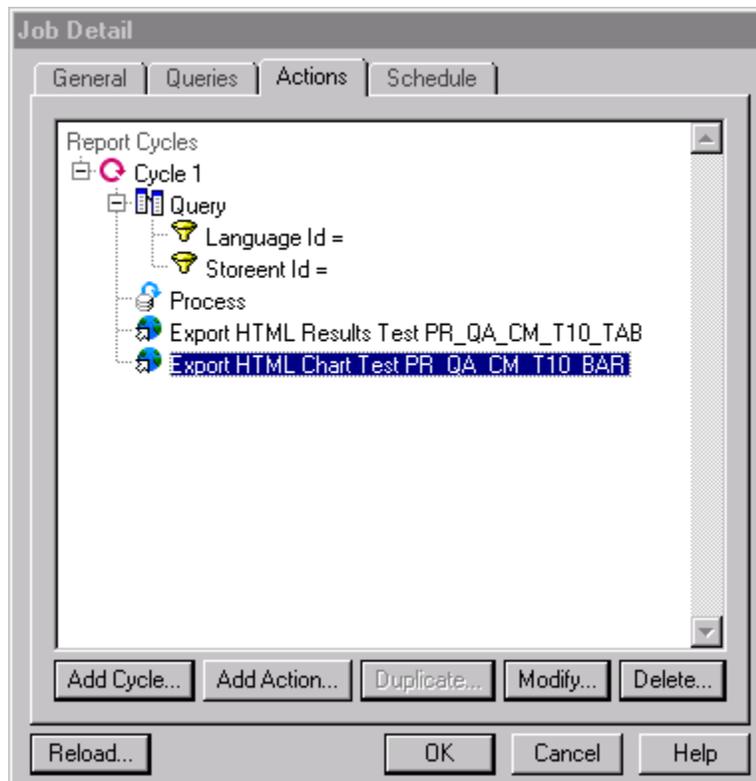
Append Job Id and Report Cycle Name to file name to ensure uniqueness.

Append date to file name.

OK Cancel Help

Figure 45: Job detail -creating a chart section

- f. Move to the **Actions** tab to check your scheduled jobs. You will find two jobs listed under process.



Job Detail

General Queries **Actions** Schedule

Report Cycles

- Cycle 1
 - Query
 - Language Id =
 - Storent Id =
 - Process
 - Export HTML Results Test PR_QA_CM_T10_TAB
 - Export HTML Chart Test PR_QA_CM_T10_BAR**

Add Cycle... Add Action... Duplicate... Modify... Delete...

Reload... OK Cancel Help

Figure 46: Checking scheduled jobs

- g. Move to the **Schedule** tab
 - i) Depending on the frequencies at which you want to publish your report, select your option from the drop down menu. In this case, we selected **Daily**.
 - ii) Set the **Time to execute** and click **OK**.

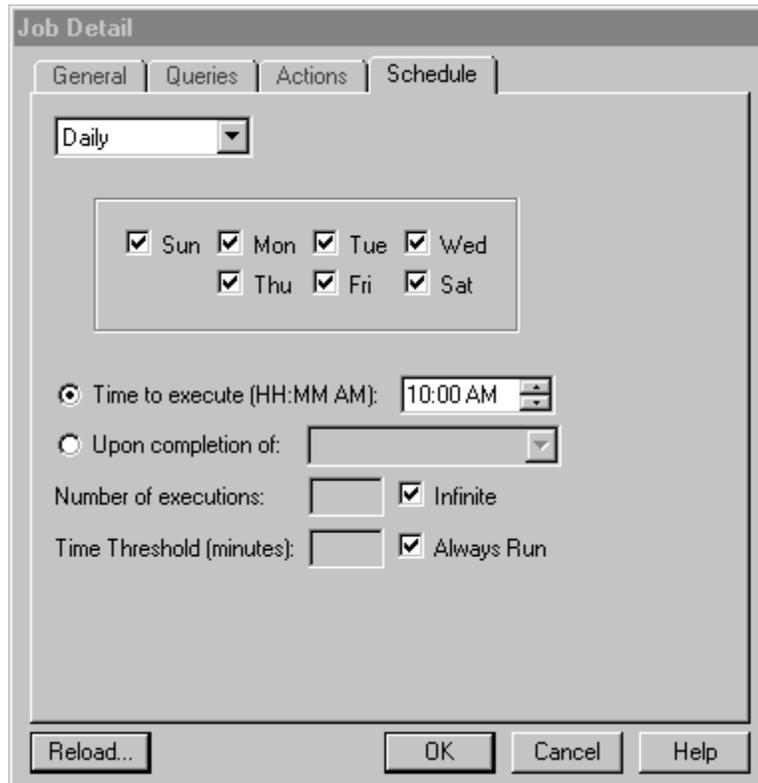


Figure 47: Job detail – schedule tab

- 6. Click **OK** to the message that pops up as shown in Figure 48.

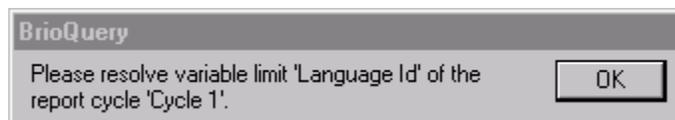


Figure 48: Resolve variable limit message

7. In the Job Detail Actions dialog, double click on **Language ID =**. Enter the **Host Password** in the pop up and click **OK**.

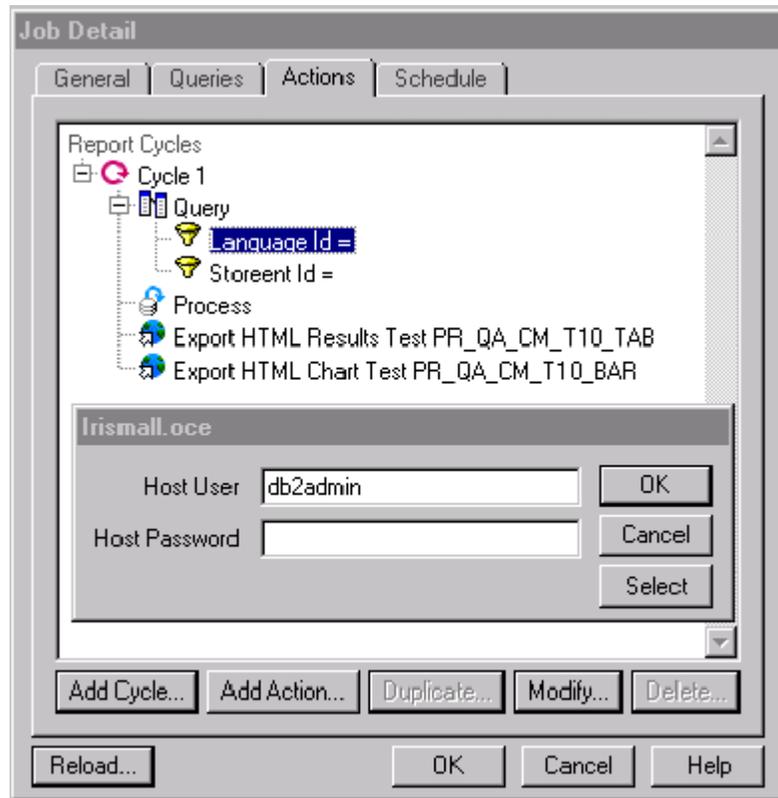


Figure 49: Setting Language ID

- a. In the Limit: Language ID dialog click on **Custom Values**. Enter the variable limit of the Language ID you choose. In this case it is **-1** and click **OK**. This displays the variable limit you entered in the Job Detail Actions dialog as shown in Figure 50.

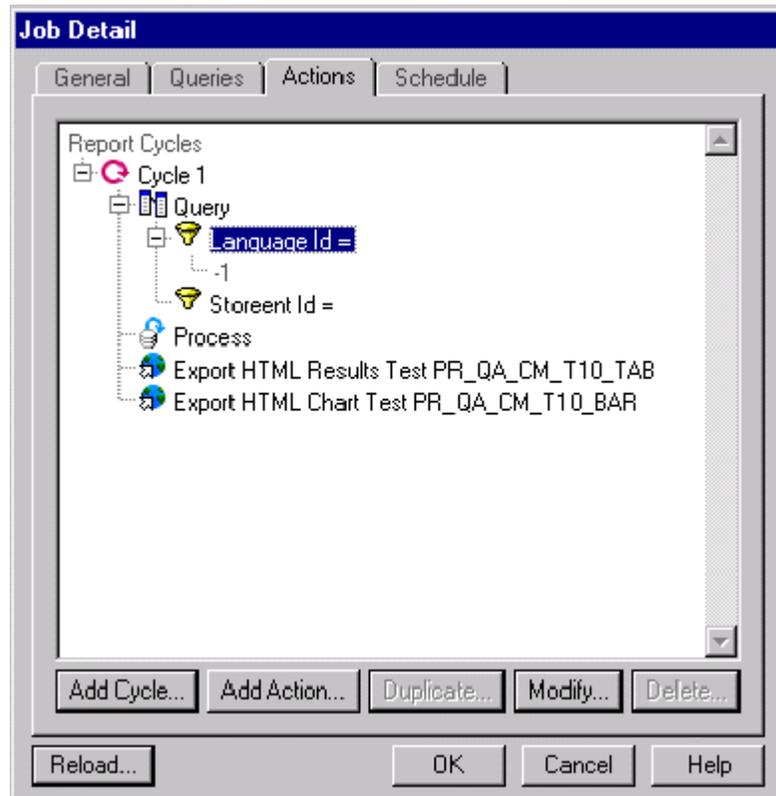


Figure 50: Displaying Language ID

- b. Click **OK**.
8. Click **OK** to the message that pops up as shown in Figure 51.



Figure 51: Resolve variable limit Storent ID message

9. In the Job Detail Actions dialog, double click on **Storent ID =** as shown in Figure 52.

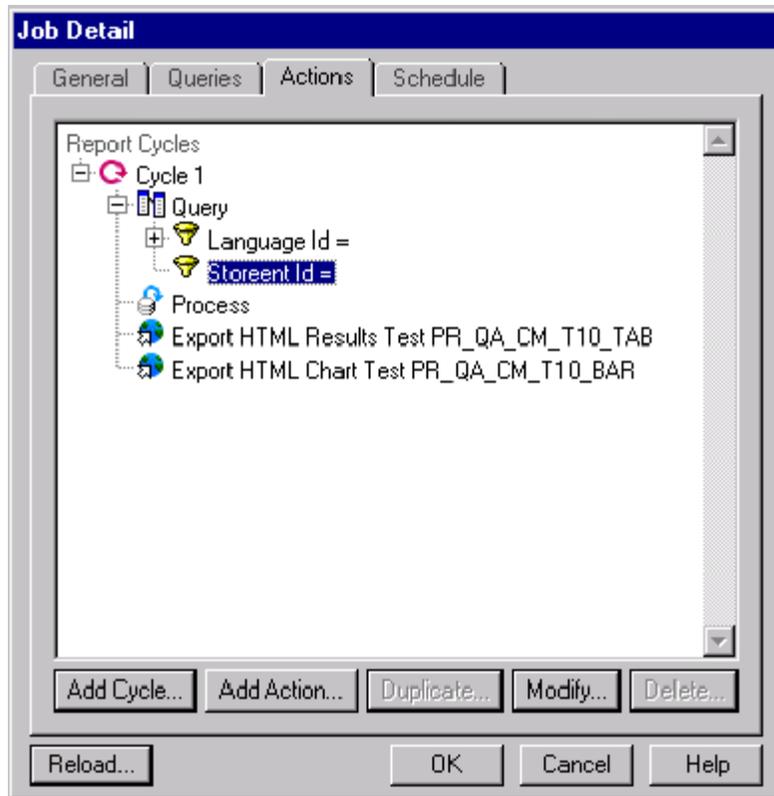


Figure 52: Setting Storeent ID

- a. In the Limit: Storeent ID dialog click on **Custom Values**. Enter the variable limit of you Storeent ID, **10001** in this case and click **OK**. This displays the variable limit you entered in the Job Detail Actions dialog as shown in Figure 52.

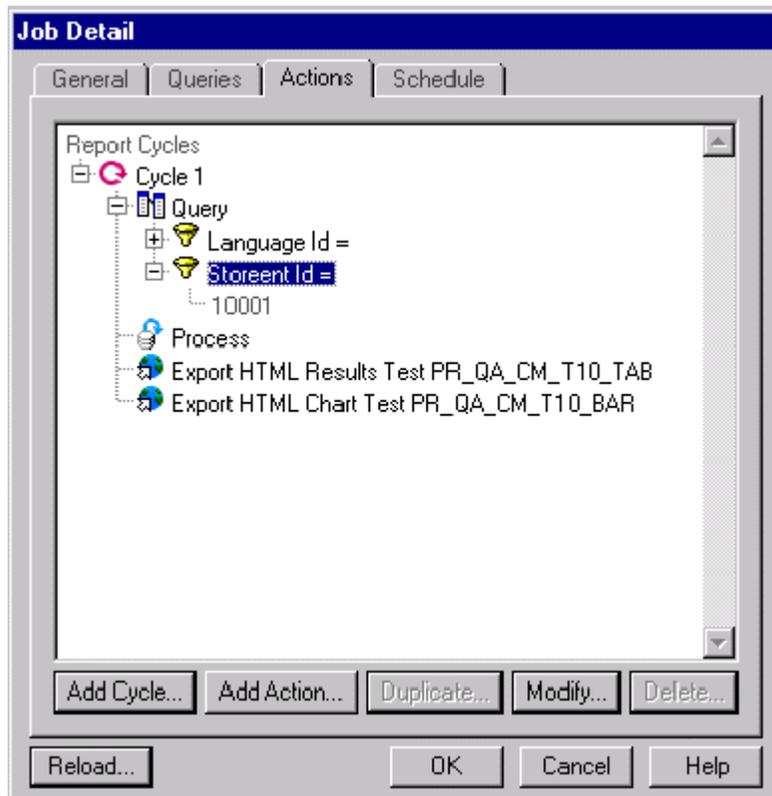


Figure 53: Displaying Storement ID

10. Enter and confirm your **Password** in the Setup Job Connections pop up. Ensure that the connection document in the **Connection** field is the one that was used to connect to the WebSphere Commerce Mall database. Click **Finish**.

Note:

Depending on the connection file you are using, your User ID and Password to Setup Job Connections can be different from the default ones provided. If this is the case, then enter your new **User ID** and **Password** as shown in Figure 54.

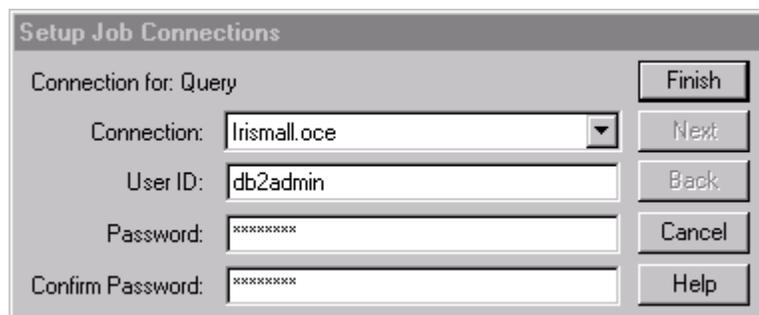


Figure 54: Setup job connections dialog

11. You will have to wait for some time before your job is added to the Job Information List. The example used here is PR_QA_CM_T10_TAB, which is displayed in the Job Information List with the Job ID as 1 as shown in Figure 55. Note that Job 1 will be published depending on the polling period you specified. In this case it is 2 minutes.

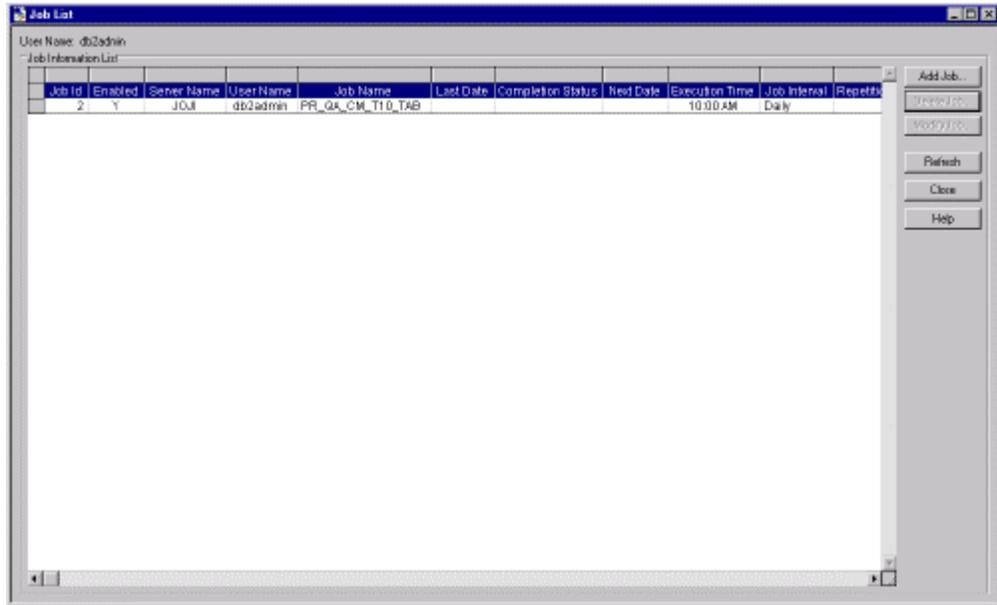


Figure 55: Displaying the scheduled job in the Job Information List

12. To check if your job is published, the Completion Status column in the Job Information List must return a **Successful** message.

Note:

In case of an error, go to the Working Directory you specified when configuring the Brio Broadcast Server preferences. In this case the Working Directory is C:\program Files\Brio\Brio Enterprise Server\temp. Check the log file with the specific job ID. This file contains the details about your job.

Chapter 7. IBM HTTP server authentication

To secure the reports created you must set HTTP server authentication for the directory where the reports are published. To do this, go to the **HTTP Administration Server Console**.

To set up authentication for the reports directory create a scope for the directory in Admin Console. For example, `C:\websphere\ibm httpserver\htdocs\brioreports`. Select this scope before making further changes in the Admin Settings. This is necessary for the changes to be effective in the reports directory. To do this,

1. Open Internet Explorer or any other browser and type the URL to the IBM HTTP Server. For example, `http://iris`.
2. On the main page click on **Configure Server**.
3. Enter the HTTP admin **User Name and Password** in the pop up. Click **OK**.
4. Select **Configuration Structure** from the left pane and then select **Create Scope**.
 - a. From the drop down menu select **Directory** as shown in Figure 56.
 - b. Select the **Path** button.
 - c. Give the path of the HTTP directory where the Brio reports are published, For example,
`C:\Websphere\ibm http server\htdocs\brioreports`
 - d. Select **All** for Allow override of directives.
 - e. Click **Submit**. The new scope is created and displays in the right pane. Refer to Figure 56.

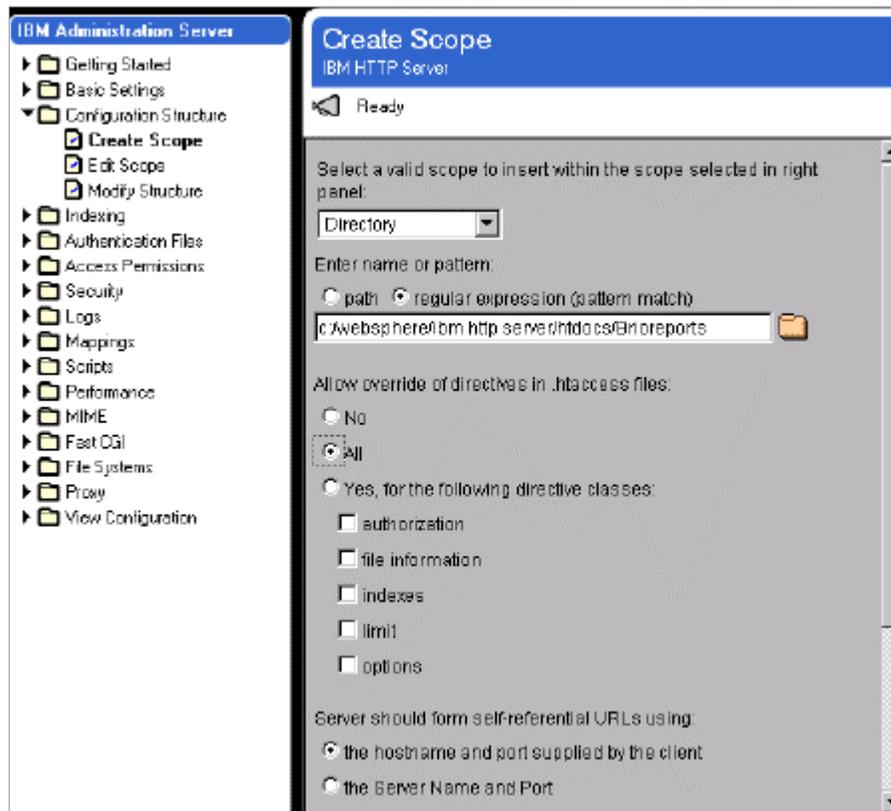


Figure 56: Creating a scope

After creating the scope, create user accounts to give access to the reports. Here, creating an individual user account is the given example.

5. To create a new user account and password go to **Authentication Files** in the left pane. This is where the user ID and encrypted password are stored. Refer to Figure 57.
 - a. From the left pane select **Individual**.
 - b. To create an authentication file click **Create**. Browse to select the **Directory** and **File Name** of the authentication file. Click **Apply**.
 - c. To define a new user click **Add**.
 - d. Enter the **User Name**, **Password** and **Reconfirm Password**. Click **Apply**.
 - e. To add more users repeat steps c and d.

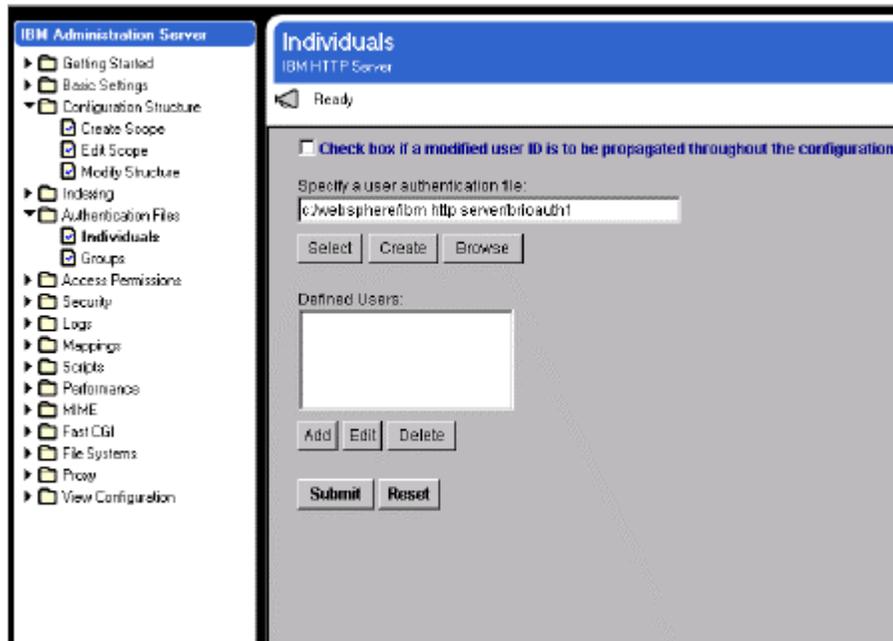


Figure 57: Entering the directory and file name of the authentication file

- f. Click **Submit** to complete the creation of the authentication file and users. The users will be added to your list of **Defined Users** as shown in Figure 58.

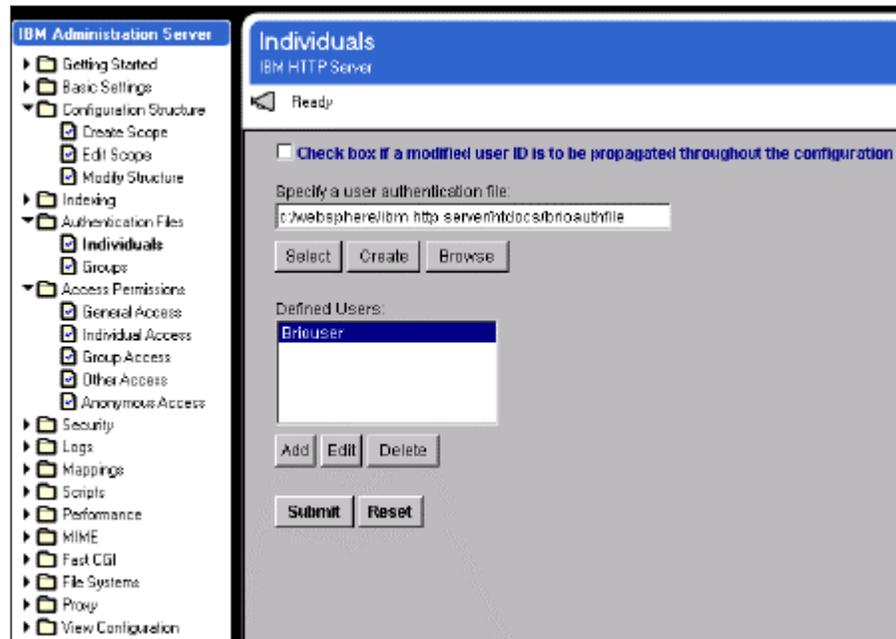


Figure 58: Displaying defined users

6. To provide access to the users you have created for the reports directory, from the left pane select **Access permissions** and **General access**.
 - a. As shown in Figure 59 click the **Scope** button on the top panel and select the Scope that was created for the reports directory in step 2.
 - b. Select **Basic** as Authentication type.
 - c. Enter the **Authentication realm name**. This acts as a reference for the browser to avoid requesting repeated access permissions for different resources in the same directory in one session.

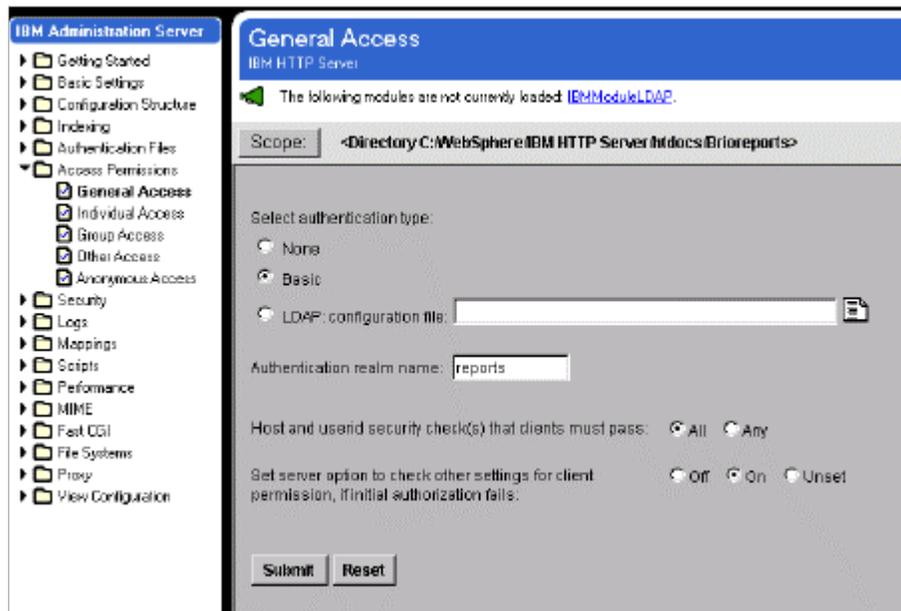


Figure 59: Providing access to the user

- d. Click **Submit**.

- e. Now, select **Individual Access** from the left pane as shown in Figure 60.

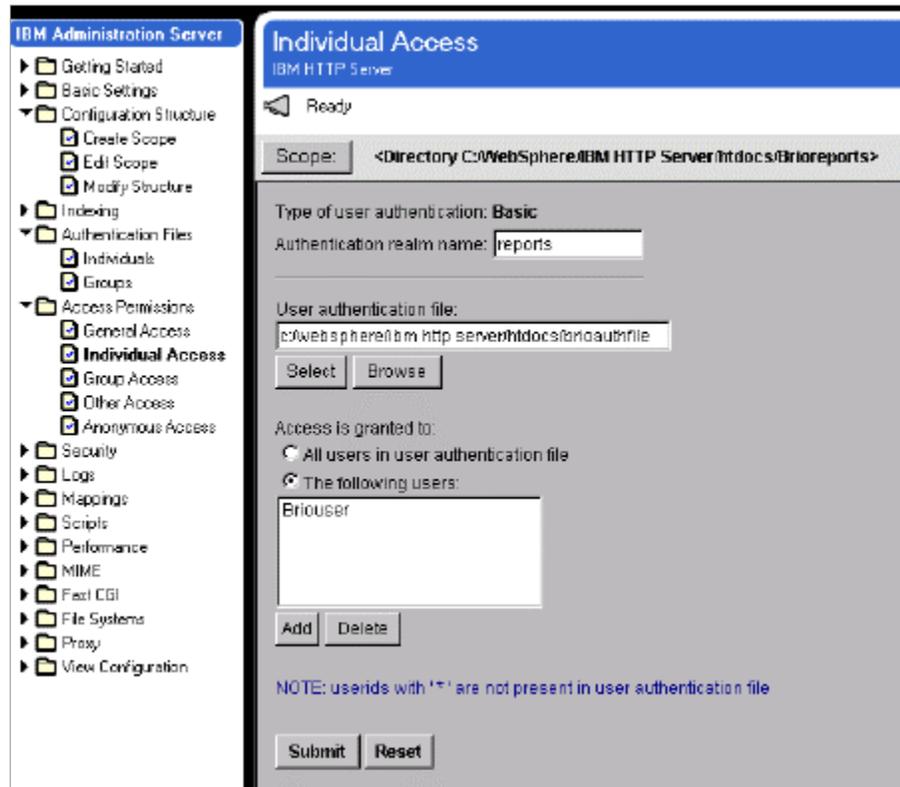


Figure 60: Giving access to the defined user

- f. Browse for the **User Authentication File**.
- g. Select **The following users**.
- h. To add a user from the authentication file click on **Add** and select the User ID. The user ID is displayed in the text area and given access. Click **Submit**.
- i. Restart the IBM HTTP Server.

Verifying authentication

1. Open a web browser and give the URL of any HTML file from the directory for which you set the HTTP authentication.
2. In the authentication dialog enter the **User ID** and **Password**. The server authenticates this and displays the requested file.

Chapter 8. Integration with WebSphere Commerce

To integrate the Brio report with WebSphere Commerce, firstly you need to generate reports from the WebSphere Commerce online database. Refer to Chapter 4. Creating reports. Publish the generated reports to the WebSphere Commerce directory structure or any other directory that you want. Refer to Chapter 6. Publishing reports. You can now begin integrating the report with WebSphere Commerce.

To provide a link to access the reports from WebSphere Commerce Accelerator, follow the steps below. These changes are made in different XML and property files that are used in Tools FrameWork.

1. In WebSphere Commerce Accelerator, add a submenu, **Online reports** under the stores menu.

- a. If you are using a B2B store, open the XML CommerceAcceleratorB2B.xml in *websphere_install_directory* \CommerceServer\xml\tools\common.

If you are using a B2C store, open the XML CommerceAcceleratorB2C.xml in *websphere_install_directory* \CommerceServer\xml\tools\common

Find the entry corresponding to "Business Intelligence Reports" as shown below:

```
<node name="biReports"
      component="CommerceAnalyzer"
      url="/webapp/wcs/tools/servlet/ShowContextList?context=store&contextConfigXML=bi.biContext&ActionXMLFile=bi.biRptStoreContextList"
      users="buyer podMgr makMgr seller catMgr" />
```

Add the following menu entry after the bireports node entry given above.

```
<node name="OnlineReports"
      url="/Brioreports/CategoryIndex.htm"
      users="buyer podMgr makMgr seller salesMgr actRep
      catMgr" />
```

The URL of the online reports must point to the directory where the reports are published. This is the Online Reports directory, in this case.

For the integration to work, all HTML files provided in the integration kit need to be copied into the online reports directory. The files include *CategoryIndex.htm*, which lists the categories of reports. Each category will have 3 or more related HTML files. These files list

the subcategories and corresponding reports present in each category.

- b. The changes in the above XML require a property file entry to reflect on the GUI. The property file that you need to change is `WAS_installation_directoty`
`\AppServer\installedApps\WC_Enterprise_App_demo.ea`
`r\properties\com\ibm\commerce\tools\properties`
`mccNLS.properties` and `mccNLS_en_US.properties`.

Note:

In this case the entry is made in `mccNLS_en_US.properties` file is `en_US` as we are using the English version of WebSphere Commerce. If you are using another language version of WebSphere Commerce, change the corresponding property file. For example, `mccNLS_de_DE.properties` for the German version of WebSphere Commerce.

- c. In the properties file, find the entry for `biReports=Business Intelligence reports`. Similarly add another entry **OnlineReports=Online Reports**. This is the link reflected in the GUI as seen in Figure 61. Here, **Online Reports** is an example. If you want to rename the link to Brioreports, then change the entry to **OnlineReports=Brioreports**.

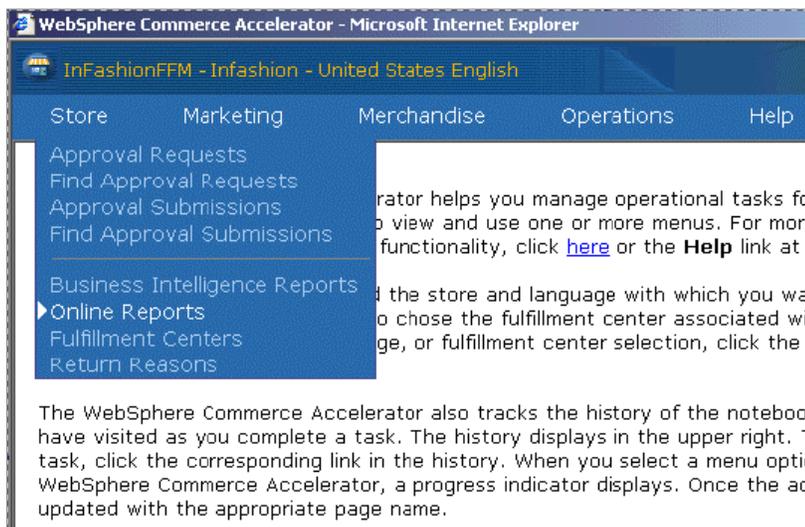


Figure 61: Creating Online Reports link

- d. Save both these property files and restart the instance. If you are in developer mode you don't have to restart the instance.
2. Click **Online Reports** to view the reports created by Brio Enterprise.
 3. In the pop up enter your **User Name** and **Password** (selected when setting the HTTP authentication) as shown in Figure 62.

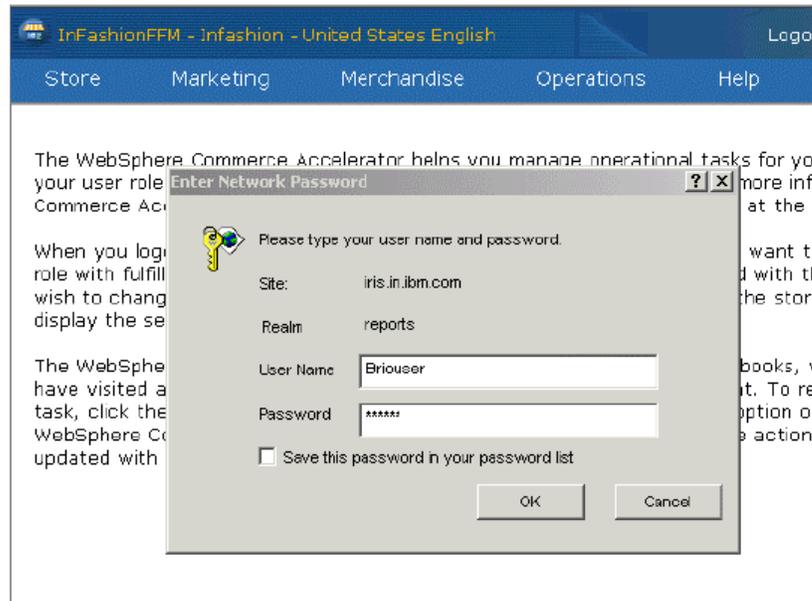


Figure 62: Enter User Name and Password

4. After authentication, the WebSphere Commerce Accelerator displays the report index page where all the categories are displayed. Follow the link to view the reports of that category.

Category	Description
Campaign	This set of reports contains information about all of your campaigns.
Initiative	This set of reports contains information about all of your campaign initiatives.
e-Marketing Spot	This set of reports contains information about all of your e-Marketing Spots.
Campaign/Initiative/e-Marketing Spot	This set of reports contains information about various combinations of the assets that comprise your marketing campaigns.
Product	This set of reports contains information about sales trends related to your products.
Order Summary	This set of reports contains information summarizing order details by date.
Geographic Sales Analysis	This category of reports groups the reports detailing geographically-based sales analysis.
Demographic Sales Analysis	This category of reports groups the reports detailing demographically-based sales analysis.
Time Period Sales Analysis	This category of reports groups the reports detailing calendar-based sales analysis.
Sales by Account	This set of reports contain information about sales by account.
Sales by Contract	This set of reports contain information about sales by contract.

Figure 63: Online reports index page

Chapter 9. Editing the index page

Online Reports is the set of sample reports provided with the integration kit. The sample reports are organized into categories. Each category contains a set of corresponding reports. You can access these reports through the WebSphere Commerce Accelerator.

1. From the **Start** menu go to **Programs, IBM WebSphere Commerce** and select **WebSphere Commerce Accelerator**, to access the WebSphere Commerce Accelerator.
2. From the **Store** menu click on **Online Reports**. This displays the index page.



The screenshot shows the 'ONLINE REPORTS' index page. At the top, there is a navigation bar with 'Store', 'Marketing', 'Merchandise', 'Operations', and 'Help'. Below the navigation bar, the page title is 'ONLINE REPORTS' and it indicates '11 ITEMS'. A table lists the categories and their descriptions:

Category	Description
Campaign	This set of reports contains information about all of your campaigns.
Initiative	This set of reports contains information about all of your campaign initiatives.
e-Marketing Spot	This set of reports contains information about all of your e-Marketing Spots.
Campaign/Initiative/e-Marketing Spot	This set of reports contains information about various combinations of the assets th
Product	This set of reports contains information about sales trends related to your products
Order Summary	This set of reports contains information summarizing order details by date
Geographic Sales Analysis	This category of reports groups the reports detailing geographically-based sales an
Demographic Sales Analysis	This category of reports groups the reports detailing demographically-based sales s
Time Period Sales Analysis	This category of reports groups the reports detailing calendar-based sales analysis.
Sales by Account	This set of reports contain information about sales by account.
Sales by Contract	This set of reports contain information about sales by contract.

Figure 64: Index page for Online Reports

The default index page of the integration kit lists the links to all the categories of reports. If you want to create a new category or a report, you must manually add the corresponding links to the index page. This section details the steps to do this.

Editing the category index page

This page displays the links to the different report categories and their descriptions. To add a new category to Online Reports, you must introduce a corresponding link to this category on the index page. Here, we are adding a new category, **Inventory**. The HTML file used to create the index page is `CategoryIndex.htm`.

Open the file `online_reports_directory\CategoryIndex.htm` in a text editor. This file will be in the directory where you have stored your published reports, which is online reports directory. Refer to Chapter 5. Configuring Brio Broadcast Server, step 11 b and Chapter 7. IBM HTTP server authentication.

1. Select a tag entry `<TR>... </TR>`. This corresponds to one row in the index table. For example,

```
<TR>

    <TD><a
href="Javascript:loadmenu('ContractMainFrame.htm');">
Sales by Contract </a> </TD>

    <TD> This set of reports contains information about
sales by contract. </TD>

</TR>
```

2. Copy the above entry and paste it after the last `</TR>` tag in the file.
3. Change **Sales by Contract** to the new category name **Inventory** and the description, **This set of reports contains information about sales by contract** to **This set of reports contains information about Inventory**, which is the description of the category you are adding.
4. Replace the href link with the main page of the category you are creating as shown below.

```
<TR>

    <TD><a
href="Javascript:loadmenu('InventoryMainFrame.htm');">
Inventory </a> </TD>

    <TD> This set of reports contain information about
Inventory. </TD>

</TR>
```

This displays the link Inventory in index page on Online Reports as seen in Figure 65.

Time Period Sales Analysis	This category of reports groups the reports detailing calendar-
Sales by Account	This set of reports contain information about sales by account.
Sales by Contract	This set of reports contain information about sales by contract.
Inventory	This set of reports contain information about Inventory.

Figure 65: Index page displaying the Inventory category link.

5. The file `InventoryMainFrame.htm` will be the main page for the inventory reports. Copy any of the existing main page files, for example `ContractMainFrame.htm` and change the name to **InventoryMainFrame.htm**. Open this file in a text editor and change the

value of the SRC attribute of the reports navigation frame to `InventoryIndex.htm` as shown below.

Change this `<FRAME NAME="ReportsNav" SRC="ContractIndex.htm">`

to `<FRAME NAME="ReportsNav" SRC="InventoryIndex.htm">`.

To provide a link for all the reports in the Inventory category, refer to Adding reports to the category index page.

Adding reports to the category index page

To add a new report to an existing category:

1. Open the index page of the category to which the new report will be added in a text editor. For example, open `InventoryIndex.htm` for the inventory category.
2. Add the report you want to add in `InventoryIndex.htm` as shown below. Note that each link will have a corresponding TR tag.

```
<TR><td></td><TD class="sub2"
align="right">Dress</TD></TR>

<tr><td></td><td class="sub2" align="right"
valign="top">All</td>

<td align="left" valign="top"><a
class="sub2"target="ReportView"
href="CO_SU_CY_ALL_TAB.htm">Table</a></td>

</tr>
```

Where:

Dress is the report name that will display when you access **Online Reports** and then **Inventory**.

CO_SU_CY_ALL_TAB.htm is the HTML output of the report query. Refer to Chapter 6. Publishing reports.

Adding the variations and representations of a report to the category index page

Each report can have many variations, for example All, Yesterday, Last Week. These variations can have different forms of representations, for example table or chart.

1. To add more representations to a report, copy and paste the following section of code. Replace the **Table** with the name of the representation and

replace **CO_SU_CY_ALL_TAB.htm** with the corresponding HTML output file name.

```
<td align="left" valign="top"><a  
class="sub2"target="ReportView"  
href="CO_SU_CY_ALL_TAB.htm">Table</a></td>
```

2. To add more variations of a report, copy and paste the following code after the last representation of the previous report variation. Replace the **ALL** with a suitable label. Then add the representations of reports to the new variation as described above.

```
<tr><td></td><td class="sub2" align="right"  
valign="top">All</td>
```

The **InventoryIndex.htm** can have as many reports as required. To add more reports, repeat step 2 from the section, Adding reports to the category index page. Replace **Dress** with a new report name and replace the variations, representations and output file names with appropriate values. The display of the Inventory index page is shown in Figure 66.

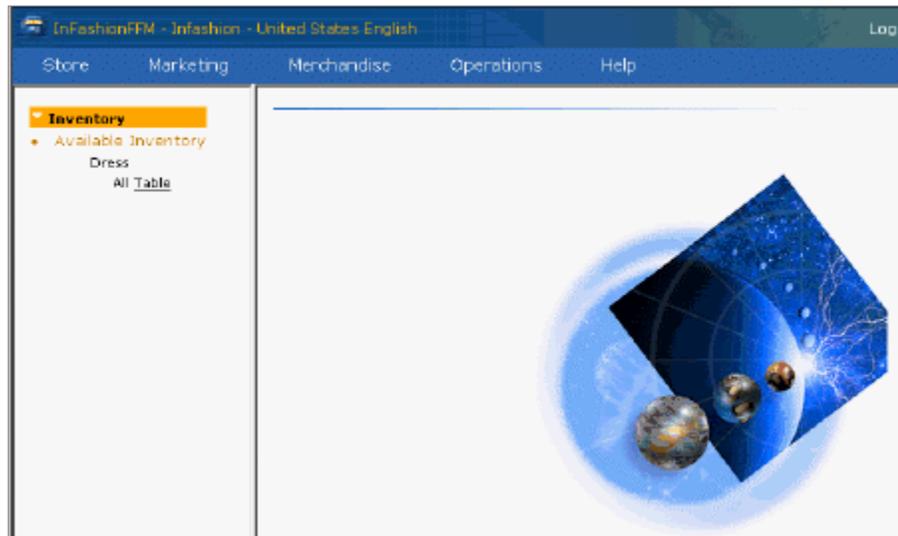


Figure 66: Display of the inventory index page

Chapter 10. Sample reports

The integration kit provides a set of ready-to-use sample reports that are compatible with the WebSphere Commerce schema.

The following table lists the report categories supported by WebSphere Commerce Version 5.4 Business and Professional Editions.

Report category	WebSphere Commerce Business Edition	WebSphere Commerce Professional Edition
Product	✓	✓
OrderSummary	✓	✓
Demographic Sales Analysis	✓	✓
Time Period Sales Analysis	✓	✓
Sales by Account	✓	x
Sales by Contract	✓	x
Geographic Sales Analysis	✓	✓
Campaign	✓	✓
Initiative	✓	✓
E-Marketing Spot	✓	✓
Campaign/ Initiative/ E-Marketing Spot Combination	✓	✓

Table 1: Report categories supported by WebSphere Commerce Business or Professional Editions

To view these sample reports execute the following steps:

1. Open a connection document for the WebSphere Commerce online database. For more information on how to open a connection document refer to *Creating a connection document for WebSphere Commerce database*.
2. Select the query corresponding to the report you want to view. Refer to *Appendix D. Table of sample reports*, for the table of sample reports.

3. Publish the query selected in step 2 on the Brio Broadcast server. For details refer to Chapter 6. Publishing reports. You can publish the report to the WebSphere Commerce directory, HTTP directory or any other external directory. Directories that are not present in the htdocs directory will need an alias in the HTTP Server.
4. Set up HTTP security for the directory where you published the reports. Refer to Chapter 7. IBM HTTP server authentication.
5. Integrate the Brio report with WebSphere Commerce by making the necessary changes in the XML files and property files. For details, refer to Chapter 8. Integration with WebSphere Commerce.
6. You can now view the sample reports from WebSphere Commerce Accelerator. Logon as administrator and select **Online Reports** from the **Store** menu.
7. Enter the **User ID** and **Password**. The index page displays.
8. Select the report and the category you want to view.

Customizing sample reports

Open the query file of the report that you want to customize in the BrioQuery Designer. Modify the query and save your changes. To view the changes publish your report in the Brio Broadcast Server. For more information refer to Chapter 4. Creating reports and Chapter 6. Publishing reports.

Appendix A. Creating the Brio repository database for DB2

The Brio Broadcast Server uses the Brio repository database for administrative purposes to poll pending jobs. You need to create a repository database for this.

1. Open the db2 command window.
2. Type **db2**.
3. Type **create db *database_name***.
Where *database_name* is **Briorepo** in this case.

After creating the Brio repository, you must create an ODBC connection for it. Refer to Appendix B. Creating an ODBC connection for the steps. When you reach step 9, select **Briorepo** from your **Known System** and continue.

Appendix B. Creating an ODBC connection for DB2

Before creating a report you must create an ODBC (Open Database Connectivity) connection. This is essential to connect to a remote database.

Note:

- Mall is the default database name for WebSphere Commerce.
- IRISMALL (as seen in the screenshots) is the database alias used as an example.



1. From the **Start** menu select **Settings** and then **Control panel**.



From the **Start** menu select **Settings**, **Control Panel** and then **Administrative Tools**.

2. Select the ODBC data source icon. The ODBC Data Source Administrator window displays.
3. Move to the **System DSN** tab. In the System DSN dialog click **Add** as shown in Figure 67.

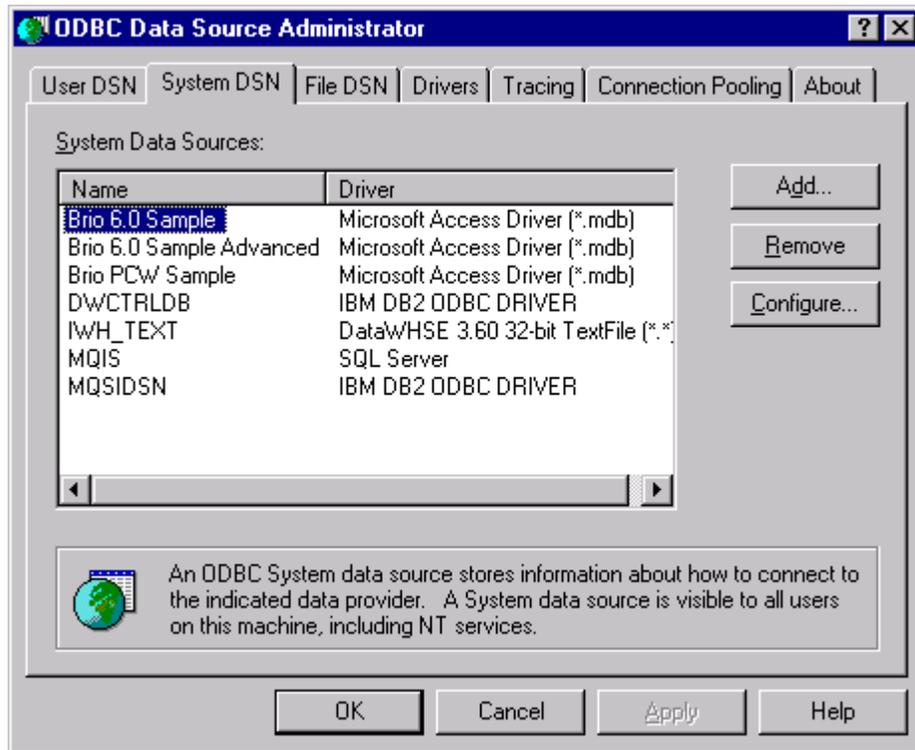


Figure 67: ODBC data source administrator

- From the Create New Data Source window as shown in Figure 68 select the **IBM DB2 ODBC DRIVER** and click **Finish**.

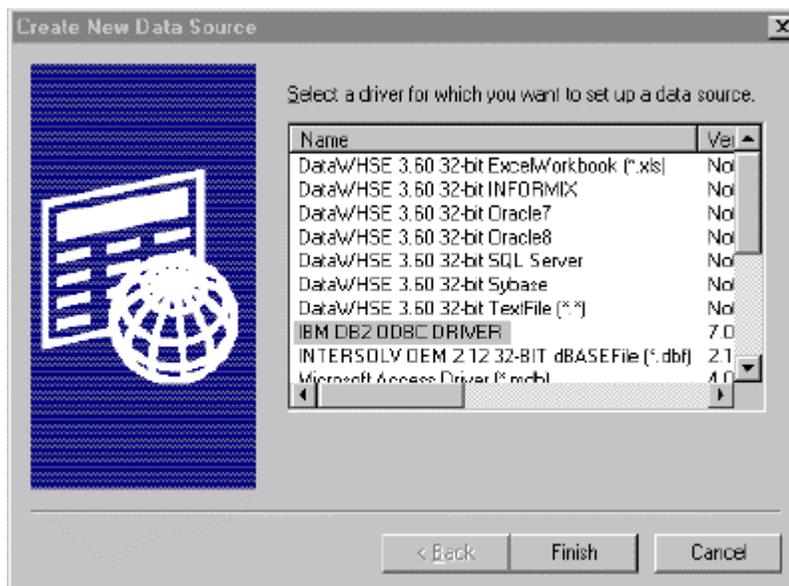


Figure 68: Selecting IBM DB2 ODBC DRIVER

5. Enter the ODBC database alias in **Data source name**. Select the **Database alias** from the drop down menu and click **OK**. If the database alias is not in the menu then click **Add**



Figure 69: Select or add database alias

6. From the Add Database Wizard select **Search the network** option and click **Next**.

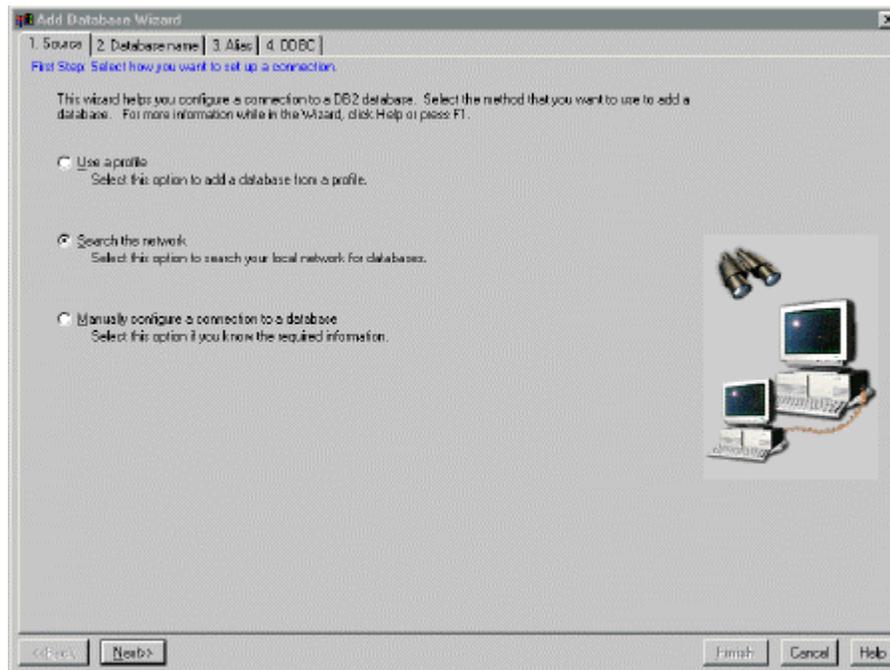


Figure 70: Searching the network

Note:

You can also select the **Manually configure a connection to a DB2 database** option.

7. In the new window, click **Known Systems** and then click **Add Systems**.
8. From the Add System dialog select the **TCP/IP** protocol. Now enter the **Host Name** or IP address of the system you want to connect to. Click **OK**. You will have to wait for a few minutes before the system is added to your list of Known Systems.
9. The system you added in step 8 displays under the **Known Systems** icon as seen in Figure 71. From the Known Systems tree select **DB2** and select the local database **MALL**. Click **Next**.

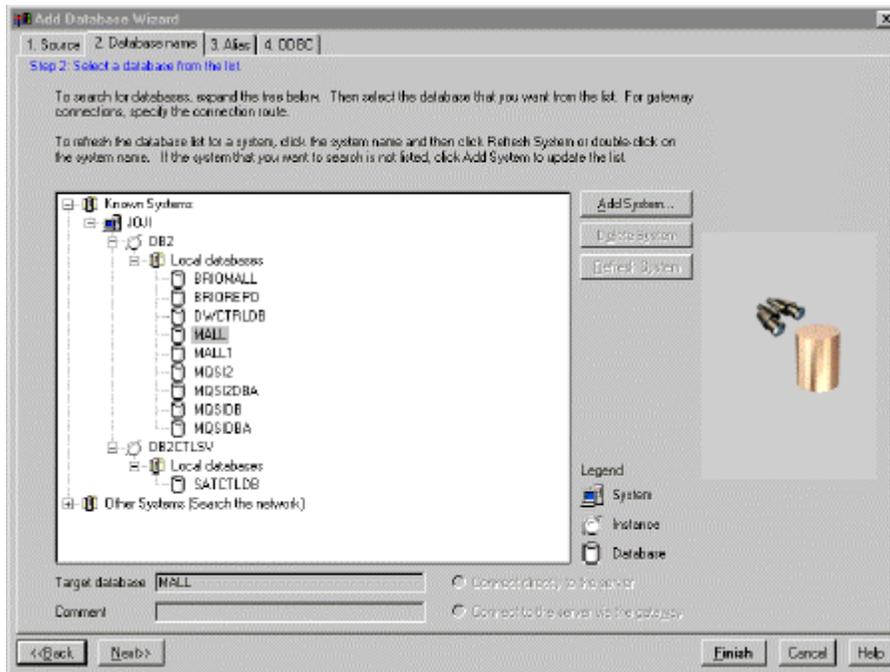


Figure 71: Selecting the local database

Note:

If your DB2 server is present under **Known Systems**, select your database from there. Else it will be listed under **Other Systems** in the network.

10. Enter the **Database alias**. It must not exceed 8 characters. Enter any comments you wish to about the database. Click **Finish**.
11. If the database is added successfully, a message confirming the same will display. Click **Close**. You will return to the ODBC Data Source Administrator dialog.

- From the ODBC Data Source Administrator dialog, select the alias of the data source created and click **Configure**.

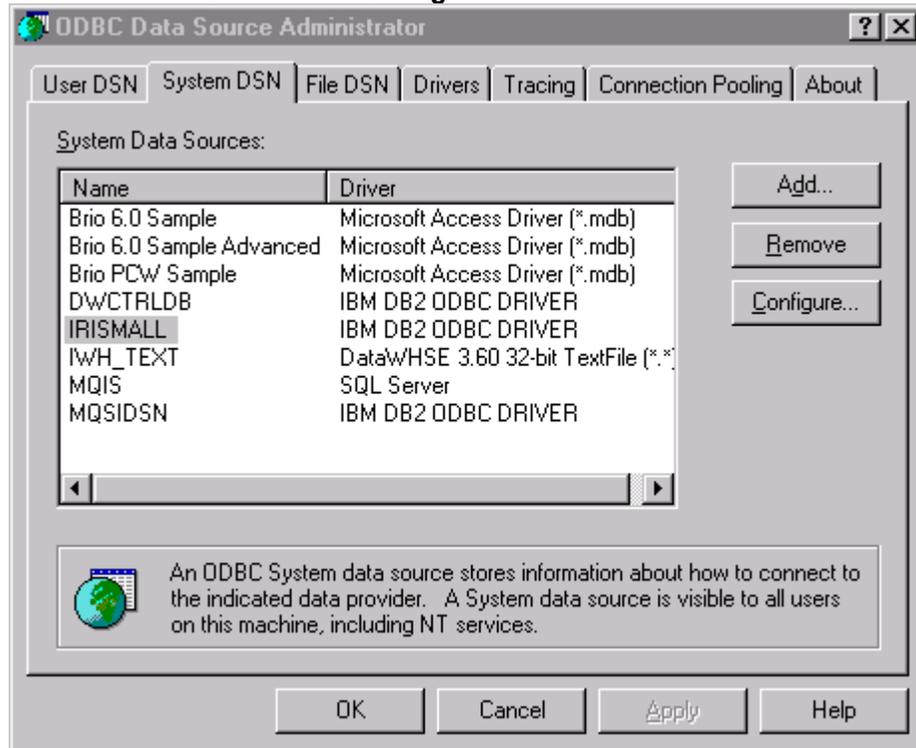


Figure 72: Configuring the database alias

- You will be asked if you want to connect to the data source. Click **Yes**.
- In the Connect To DB2 Database dialog enter **User ID** and **Password**. Ensure that the **Connection Mode** is on **Share**. Click **OK**.
- If the connection is successful a confirmation message pops up. Click **OK**.
- The CLI/ODBC Settings window displays. Click **OK**. This completes the ODBC connection for DB2.)

To create an ODBC connection for Brio repository (*briorepo*) follow the steps given above. When you reach step 9, select **Briorepo** as your Known System and continue.

Similarly, if you want to create an ODBC connection for any other database, follow the steps given above. When you reach step 9, select the database you want to connect to as the known system and continue.

Note:

The ODBC connection is not restricted by the physical location of WebSphere Commerce and Brio databases.

Appendix C Using the Oracle database

This section details the steps required when using the global Oracle database with the sample reports provided in the integration kit.

Oracle client configuration

Before you execute the following steps for the Oracle client configuration, ensure that you have installed Oracle client version 8.1.7

1. From the **Start** menu go to **Programs, Oracle – OracleHome81, Network Administration** and select **Net8 Configuration Assistant**.
2. Select **Local Net Service Name configuration**. Click **Next**.

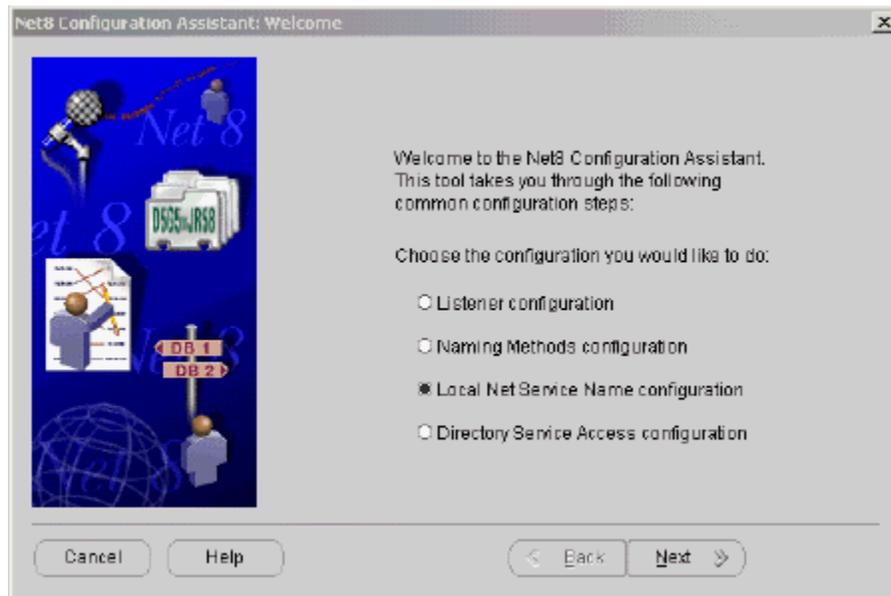


Figure 73: Net8 Configuration Assistant welcome

3. Select **Add** as shown in Figure 74. Click **Next**.

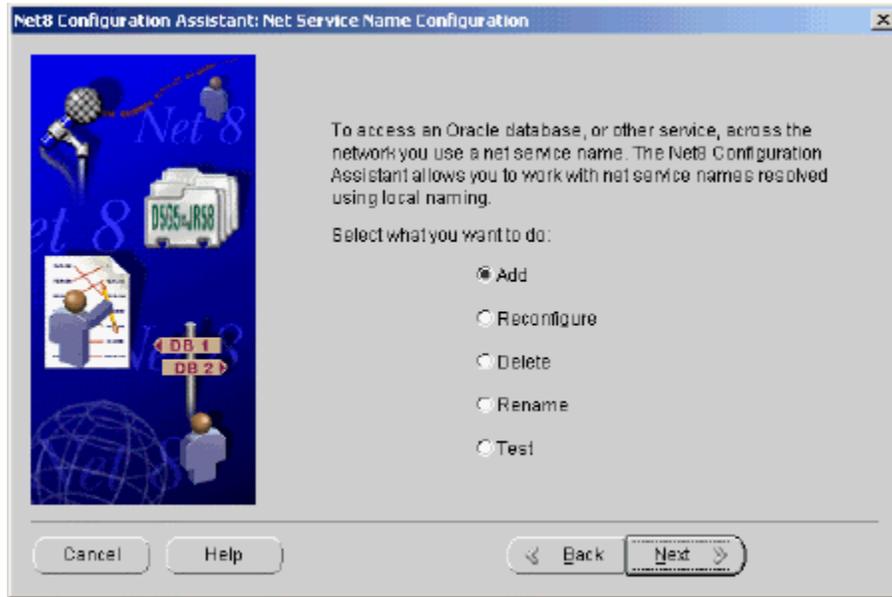


Figure 74: Net Service Name configuration

4. Select **Oracle8i database or service**. Click **Next**.

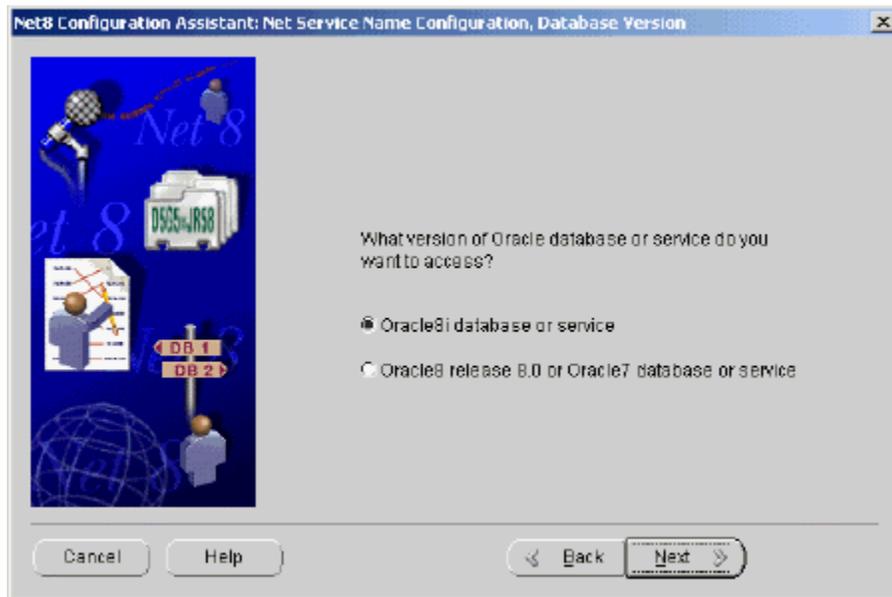


Figure 75: Net Service Name Configuration, Database version

5. Enter the Service Name, which is the global Oracle database name. It does not have to include your IP address. Click **Next** as shown in Figure 76.



Figure 76: Net Service Name Configuration, Service name

6. Select **TCP/IP** from the drop down list. Click **Next**.

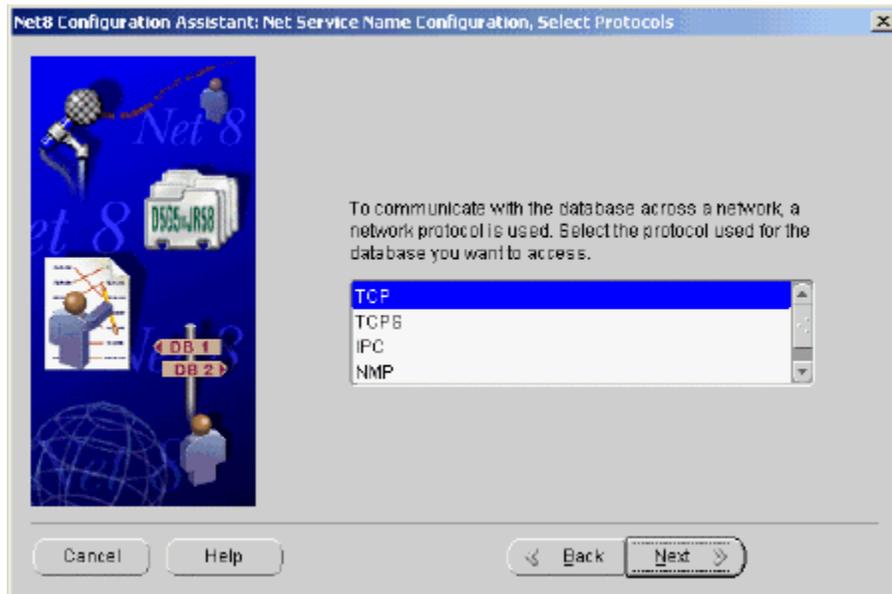


Figure 77: Net Service Name Configuration, Select protocols

7. Specify the **Host Name** or the IP address of the machine where the Oracle server is installed. Select **Use the standard port number of 1521** as shown in Figure 78.

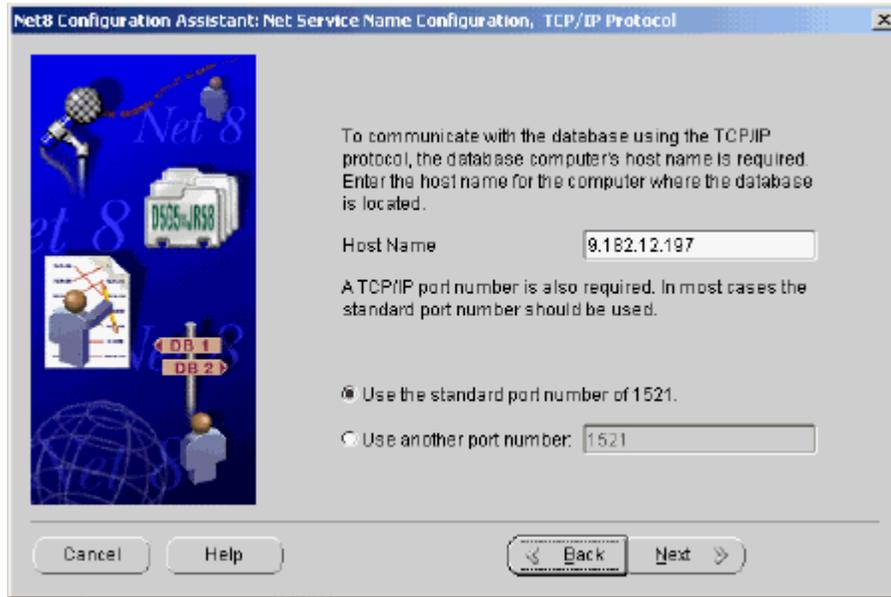


Figure 78: Net Service Name Configuration, TCP/IP protocol

8. Select **Yes, perform a test** Click **Next**.

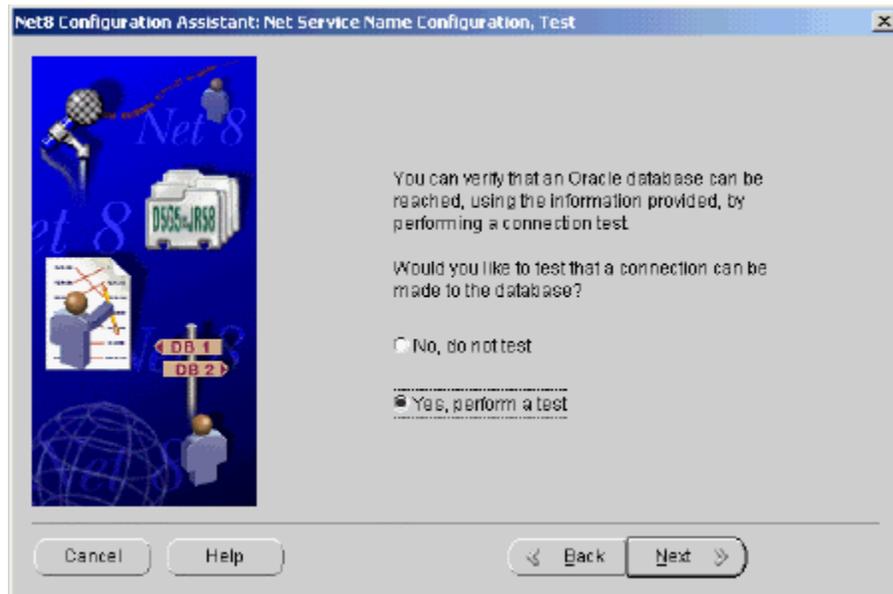


Figure 79: Net Service Name Configuration, Test

9. Click **Change Login** as shown in Figure 80.

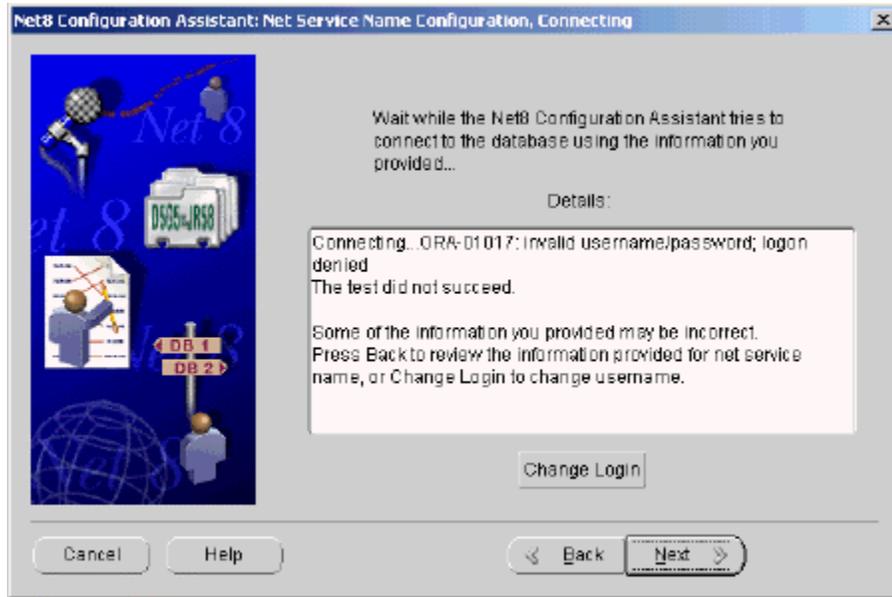


Figure 80: Net Service Name Configuration, welcome screen

10. The default Username and Password display. Change the **Username** and **Password** that you used to connect to the global Oracle database. Click **OK**. Refer to Figure 81.

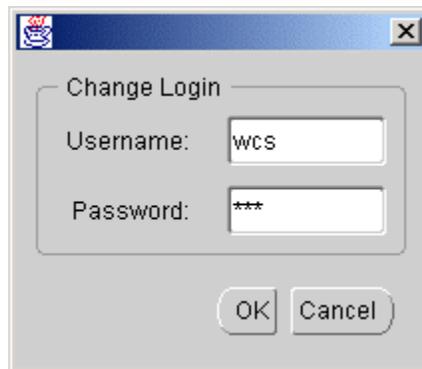


Figure 81: Change Login

11. If the connection is successful a message pops up confirming the same. Click **Next**.

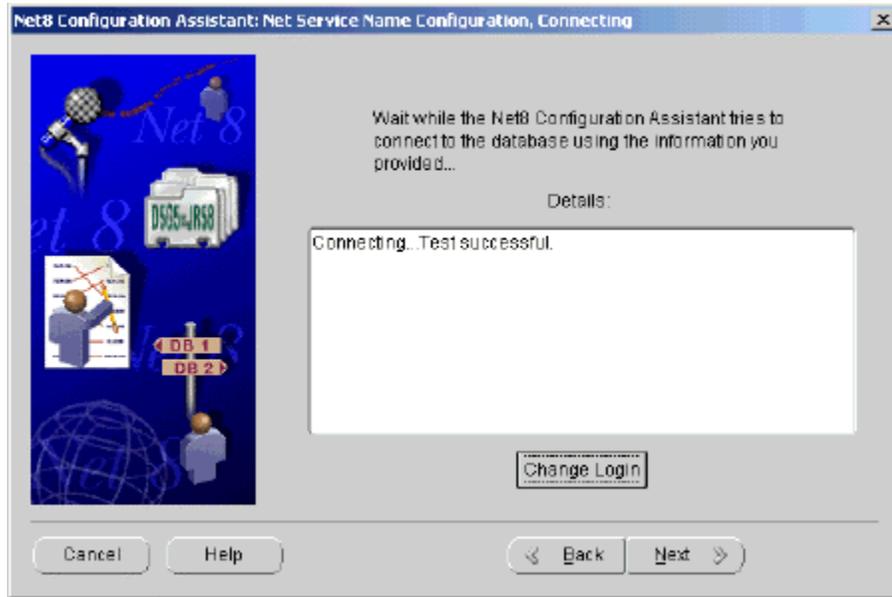


Figure 82: Net Service Name Configuration, Connecting

12. Enter the **Net Service Name** and click **Next**.

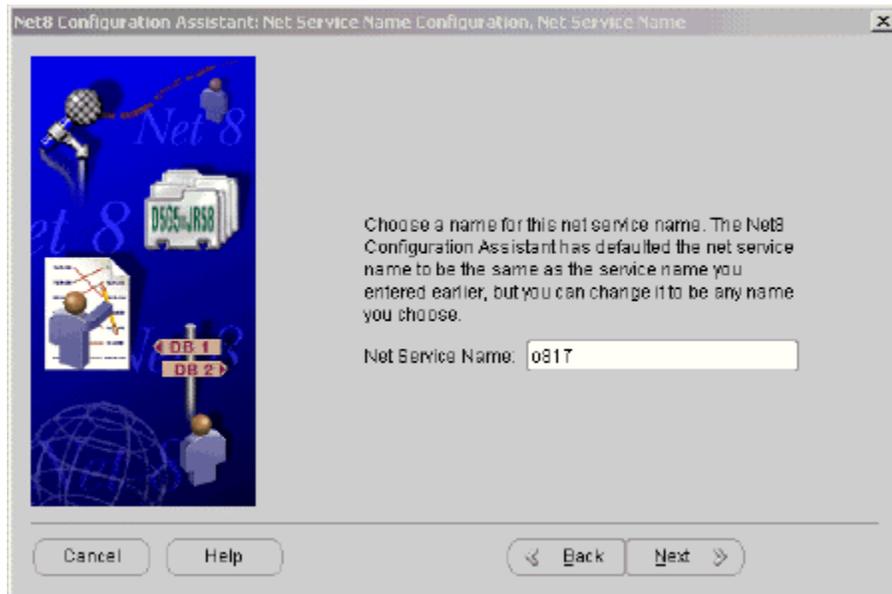


Figure 83: Entering the Net service name

13. Click **Next** as shown in Figure 84.



Figure 84: Net Service Name Configuration, welcome screen

14. Click **Finish** to complete the connection as shown in Figure 85.

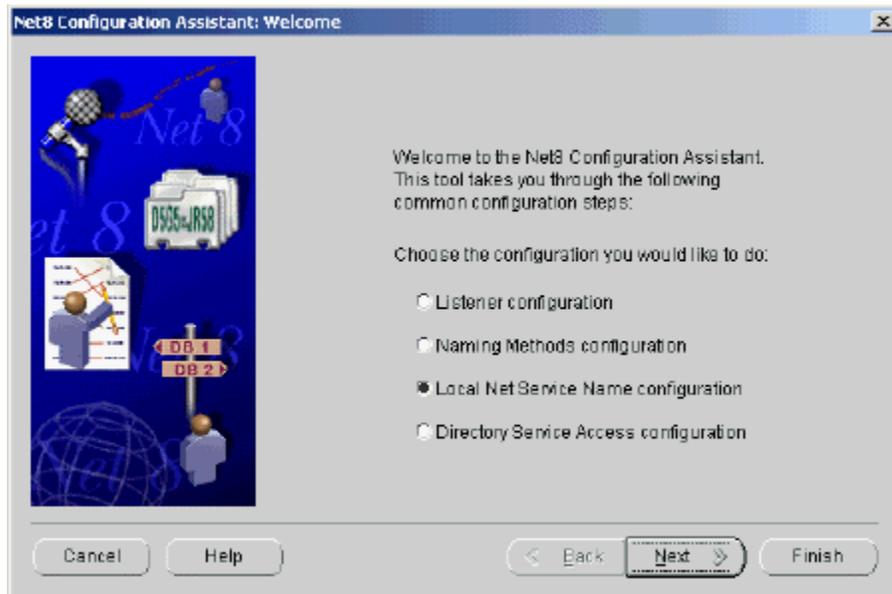


Figure 85: Clicking finish to complete the connection

Creating the Brio repository database for Oracle

Execute the following steps from the machine where you have installed the Oracle Server to create the Brio repository database, `Briorepo`.

1. From the **Start** menu go to **Programs, Oracle – OraHome81, Database Administration** and select the **Database Configuration Assistant**.
2. Select the **Create a database** radio button. Click **Next**.

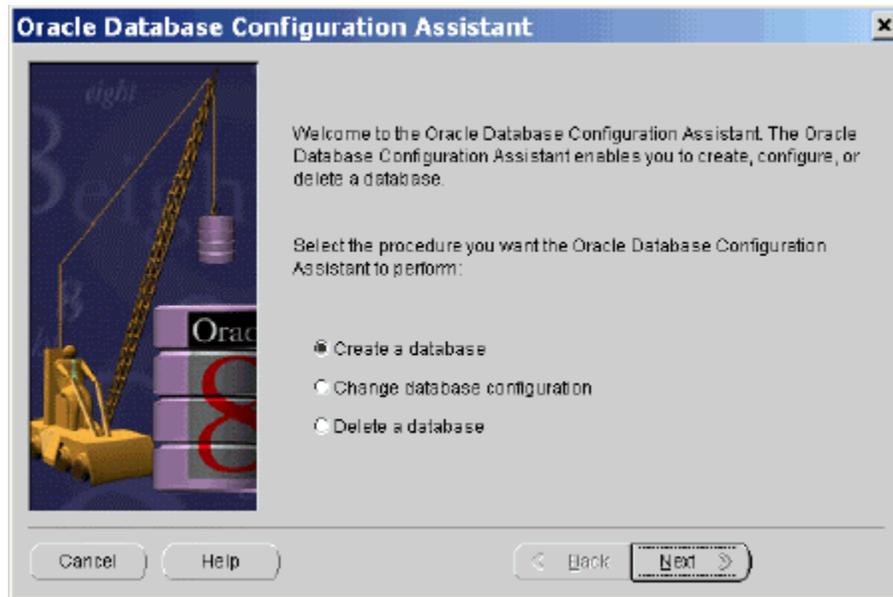


Figure 86: Oracle Database Configuration Assistant

3. Select the **Typical (recommended)** radio button and click **Next** as shown in Figure 87.

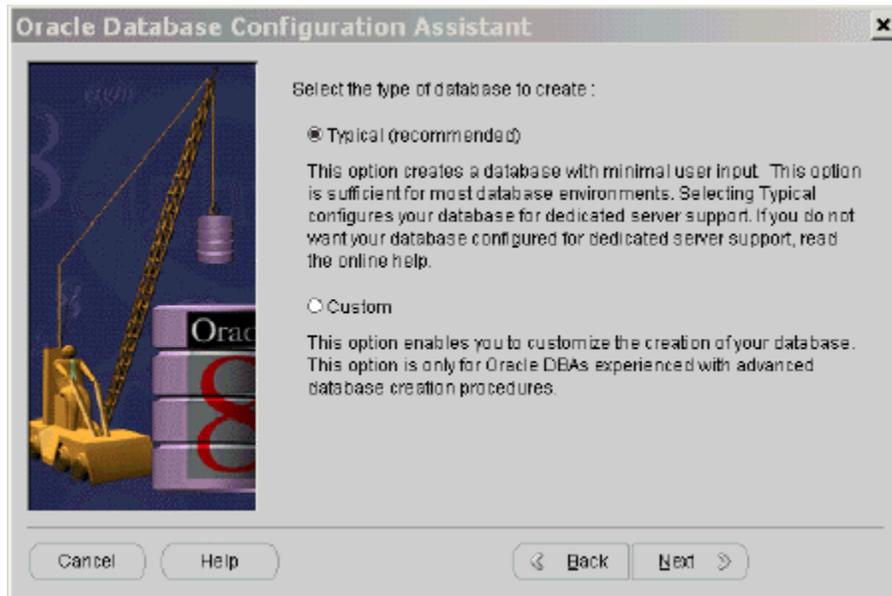


Figure 87: Selecting database type

4. Select **Create new database files** and click **Next**.

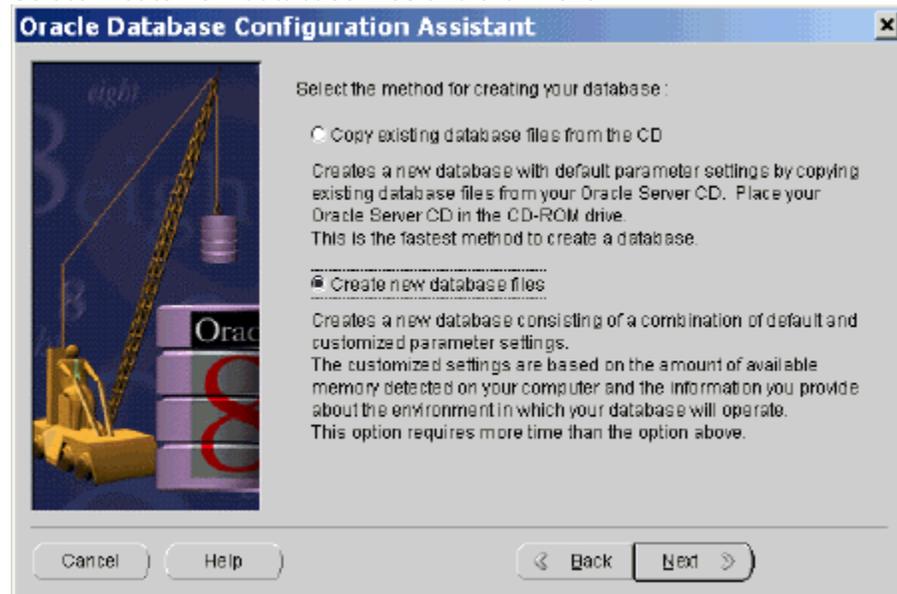


Figure 88: Creating new database files

5. Select **Online Transaction Processing (OLTP)** and click **Next**.

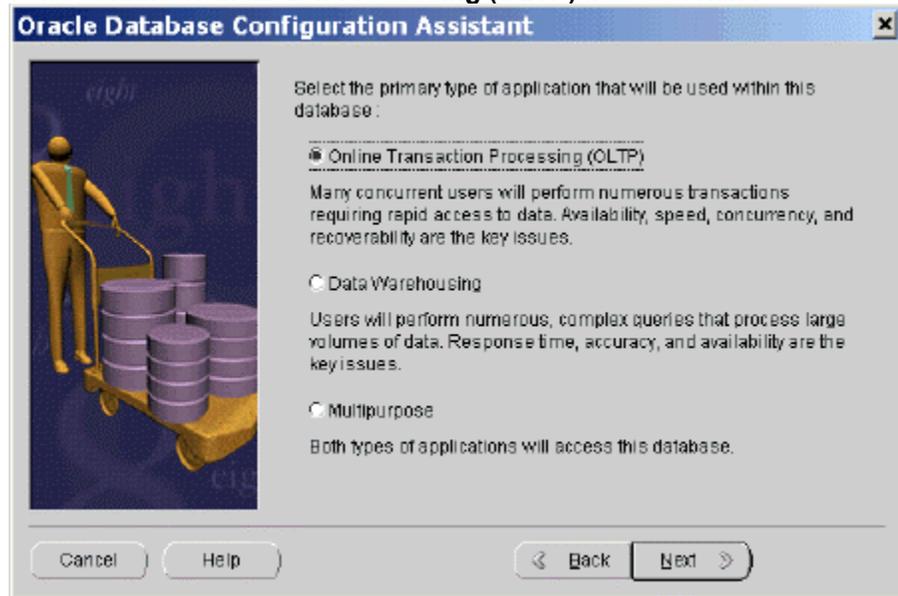


Figure 89: Selecting type of application

6. Use the default value for **Concurrently connected users**. In this case it is 15. Click **Next**.

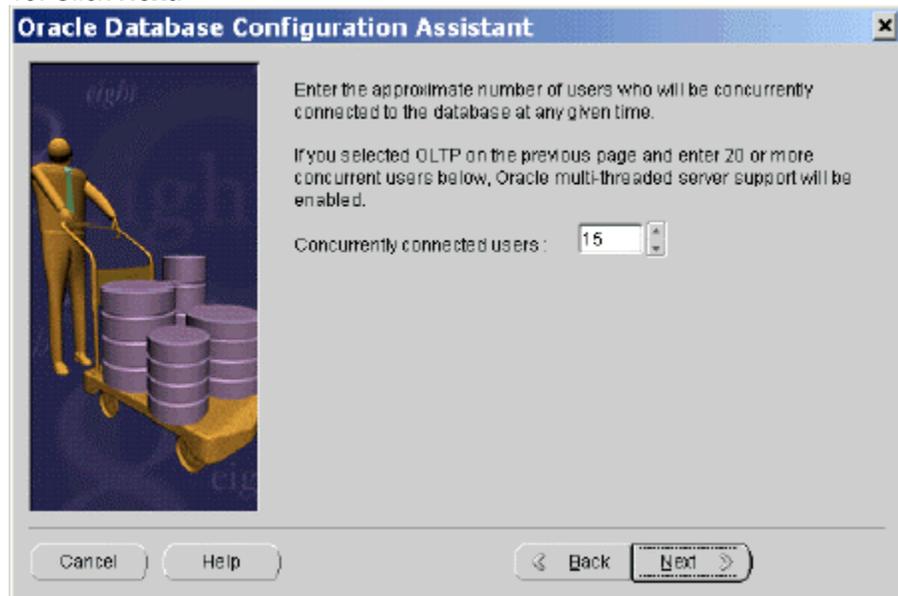


Figure 90: Selecting Concurrently connected users

7. Select the **Oracle Time Series** and the **Advanced Replication** check boxes. Uncheck the others and click **Next**.

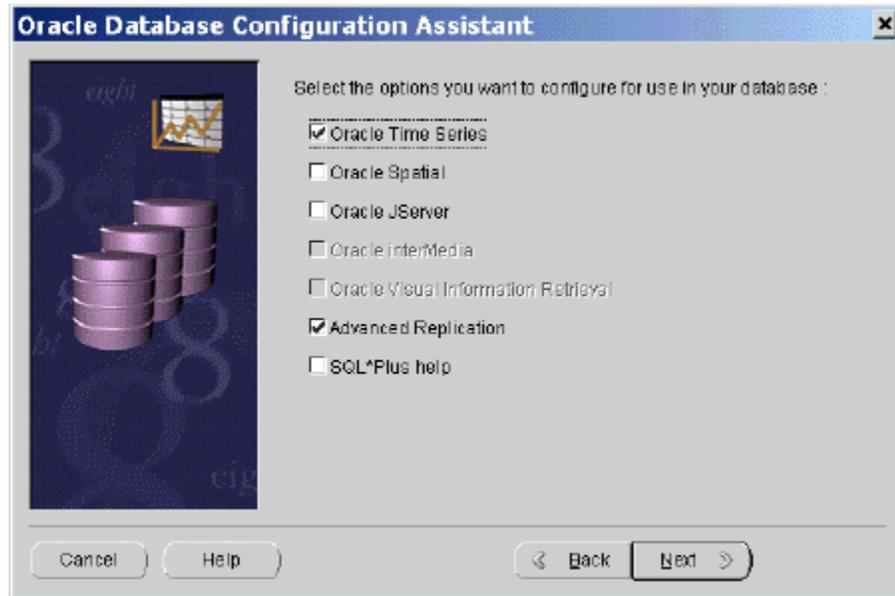


Figure 91: Selecting configuration options for the database

8. Enter the **Global Database Name**, Briorepo in this case. Briorepo appears as the default value for **SID**. Click **Next**.

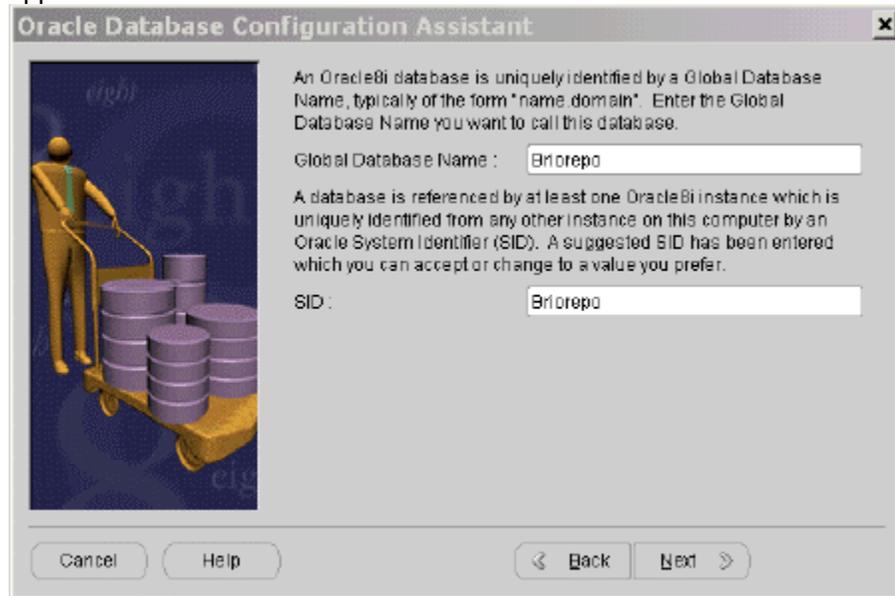


Figure 92: Entering the Global Database name

9. Select the **Create database now** radio button and click **Finish**.



Figure 93: Creating the database

10. Click **Yes** when asked if you want to proceed creating the database. This may take a few minutes. When the database is created successfully the Oracle Database Configuration Assistant Alert displays. Click **OK**.

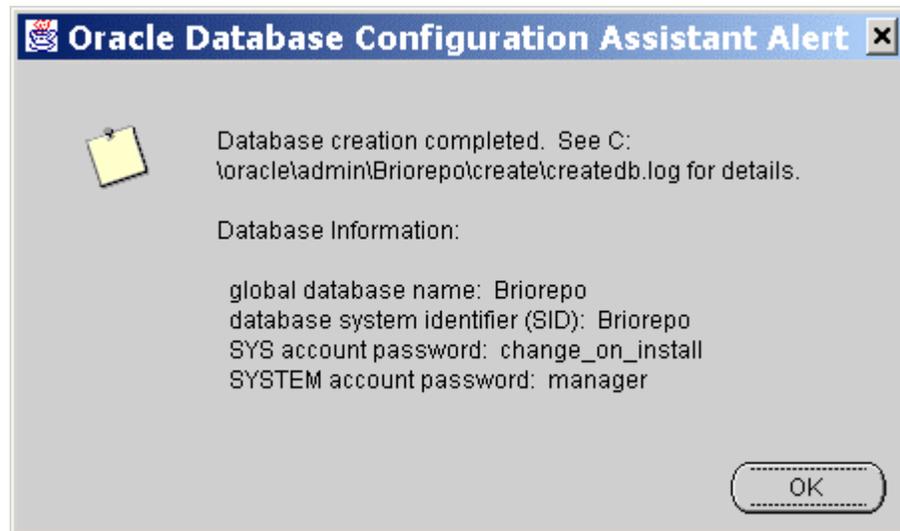


Figure 94: Database creation completed message

This completes the creation of the Brio repository database for Oracle.

Creating an ODBC connection for Oracle database

Before creating a report you must create an ODBC (Open Database Connectivity) connection. This is essential to connect to a remote database.

Note:

- o817 is the default database name for Oracle.
- ORACLEMALL (as seen in the screenshots) is the database alias used as an example.

1.  From the **Start** menu select **Settings** and then **Control panel**.
 From the **Start** menu select **Settings, Control Panel** and then **Administrative Tools**.
2. Select the ODBC data source icon. The ODBC Data Source Administrator window displays.
3. Move to the **System DSN** tab. In the System DSN dialog click **Add** as shown in Figure 95.

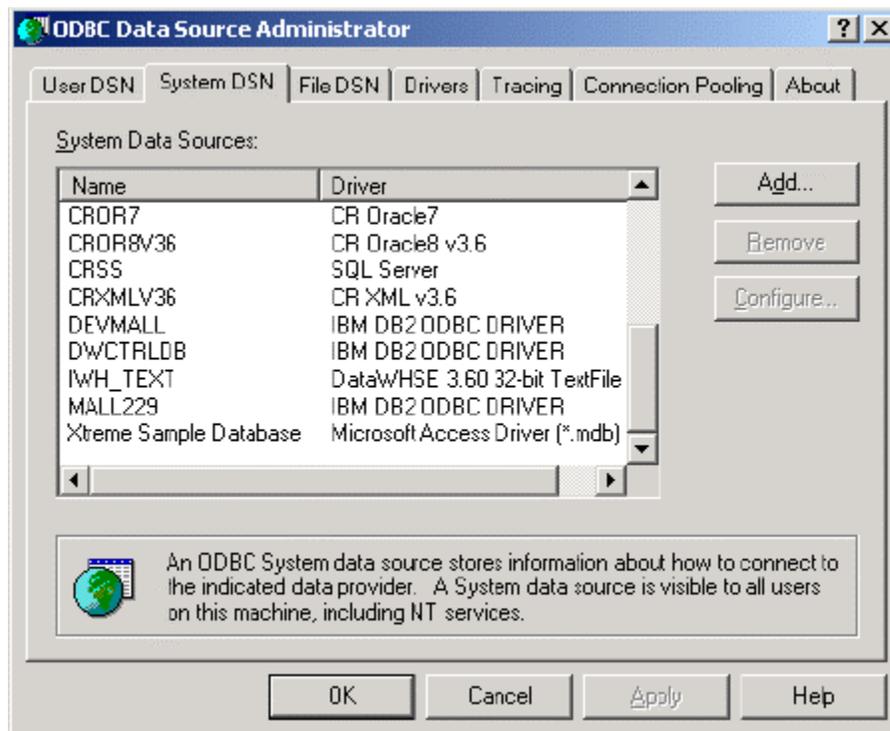


Figure 95: ODBC Data Source Administrator

4. From the Create New Data Source window as shown in Figure 96. Select the **Oracle ODBC DRIVER** and click **Finish**.

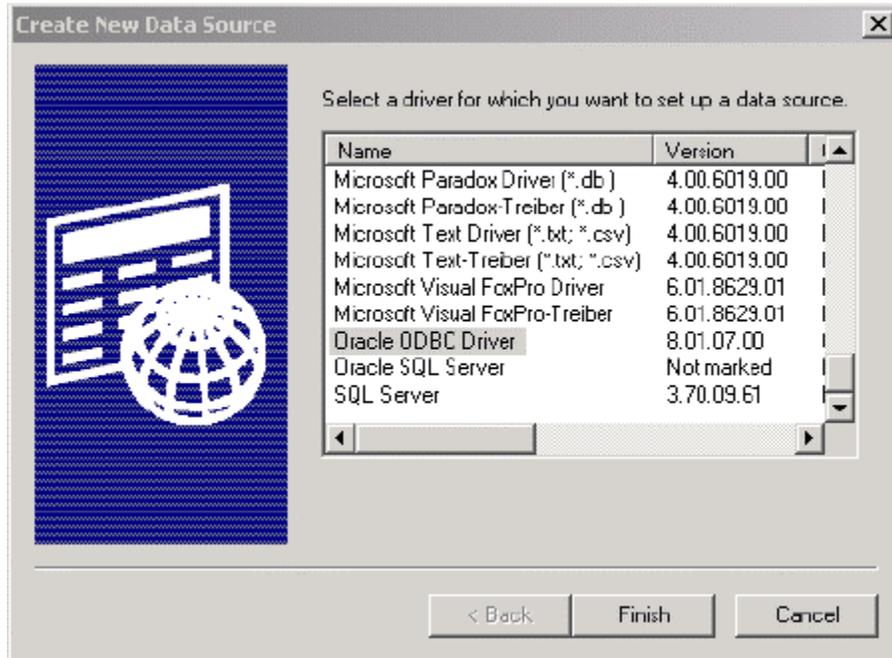


Figure 96: Creating a new data source

5. Enter the ODBC database alias in **Data Source Name**. Enter the **Description** of the database. Enter the **Service Name**, which is the global Oracle database name. Enter the **UserID**, which is WCS in this case. Click **OK**.

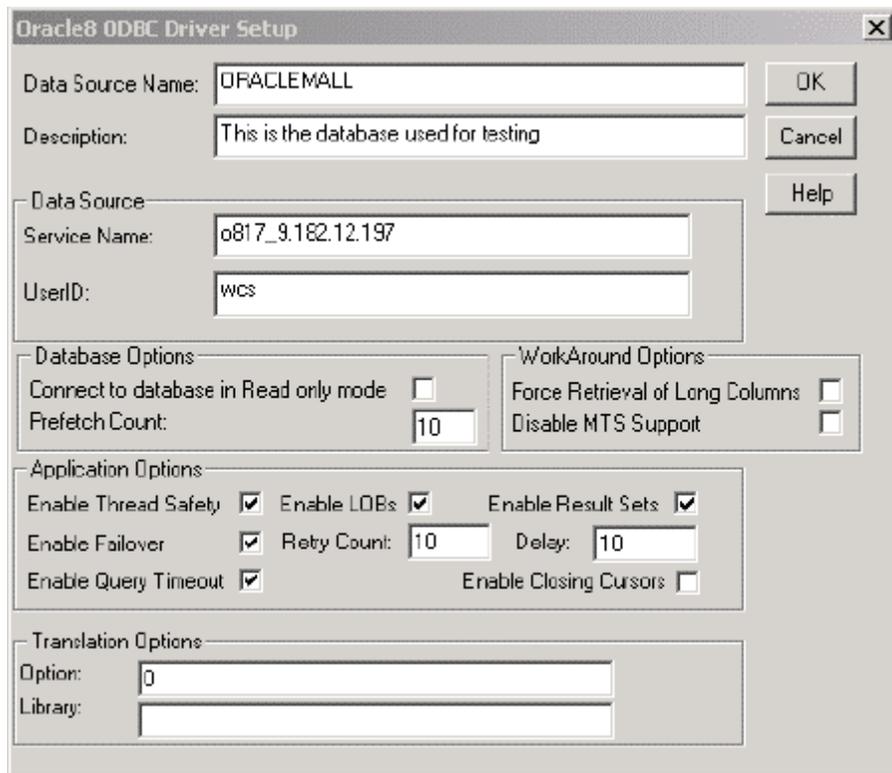


Figure 97: Select or add database alias

Note:

wcs is the user name to connect to the global Oracle database.

6. **ORACLEMALL** is added to the list of ODBC connections.

Creating a connection document for Oracle database

Before you create a report you must create a connection document. The BrioQuery Designer uses a connection file whenever you connect to a database. Connection files contain the information to log on to a specific database. This includes connection parameters such as the connection software, the database software, the address of your database server, and your database user name.

Before you create a connection document you must complete creating an ODBC connection for the Oracle global database. Refer to Appendix C Using the Oracle database.

To create the connection document for the Oracle database, open the BrioQuery Designer.

1. From the **File** menu select **New**. A new file dialog displays.
2. Select **A New Database Connection File** and click **OK**.

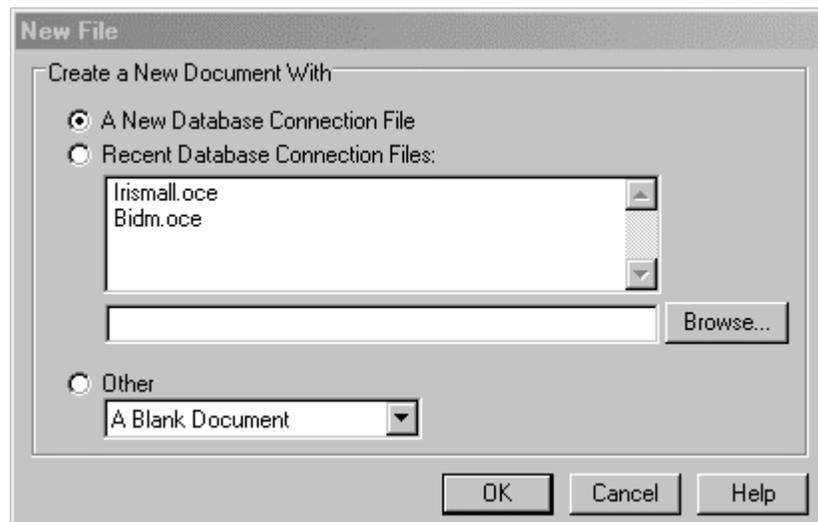


Figure 98: New file dialog

Note:

The dialog box allows you to create a new connection file, or select a database connection file from a menu list. You can also open recent document files. When opening a previously used document, BrioQuery Designer automatically uses the connection file that was used to create the document, provided the connection file has not been moved, renamed, or deleted.

3. From the Database Connection Wizard select the connection software and database type. Select the **Prompt for database name** checkbox. Click **Next**.

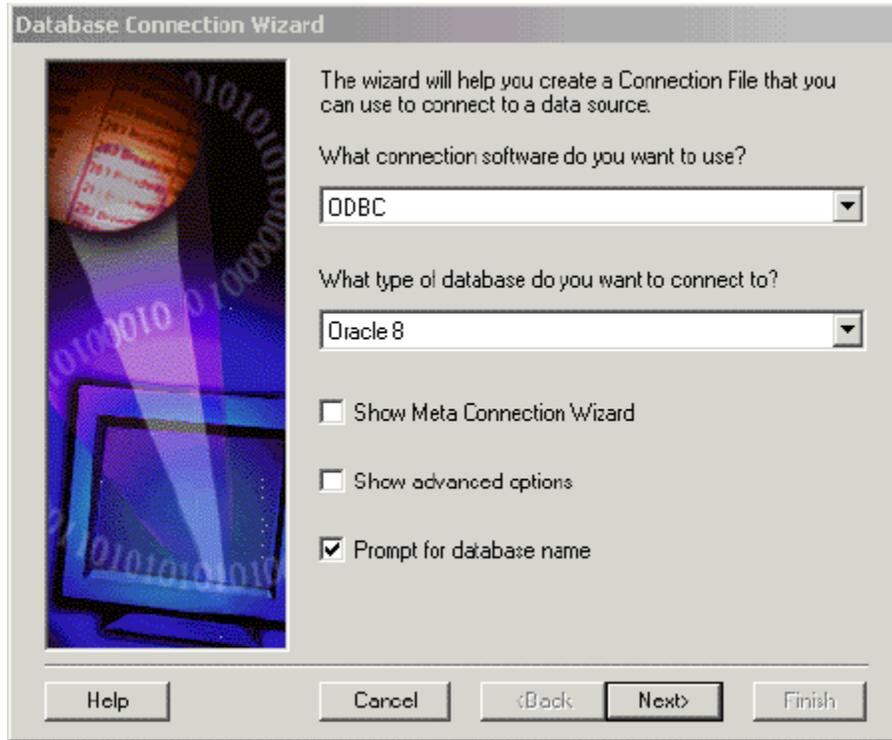


Figure 99: Select connection software and database

4. In the next dialog, enter the **User Name** and **Password**. Select the **Host** ORACLEMAIL in this case from the menu. This is the data source (Database alias created during ODBC connection). Click **Next**.
5. Select the **Database** o817 from the drop down menu, click **Next** and then **Finish**. If the drop down list is empty, then type the Database.
6. Save your OCE. By default the file is saved in Brio/Brioquery/programs/open catalog extension folder. This completes the creation of your connection document.

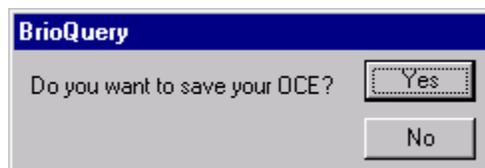


Figure 100: Save OCE dialog

Appendix D. Table of sample reports

The following tables lists the details of the sample reports provided in the integration kit.

Category: Product				
Sub category	Sub sub category	Report details	Report name	
Sales Value		Yesterday Top 10	PR_SV_YD_T10_TAB	
		Yesterday Bottom 10	PR_SV_YD_B10_TAB	
		This weekTop 10	PR_SV_CW_T10_TAB	
		This week Bottom 10	PR_SV_CW_B10_TAB	
		This MonthTop 10	PR_SV_CM_T10_TAB	
		This Month Bottom 10	PR_SV_CM_B10_TAB	
		This QuarterTop 10	PR_SV_CQ_T10_TAB	
		This Quarter Bottom 10	PR_SV_CQ_B10_TAB	
		This Year Top 10	PR_SV_CY_T10_TAB	
		This Year Bottom 10	PR_SV_CY_B10_TAB	
	Units Sold		Yesterday Top 10	PR_QU_YD_T10_TAB
			Yesterday Bottom 10	PR_QU_YD_B10_TAB
		This weekTop 10	PR_QU_CW_T10_TAB	
		This week Bottom 10	PR_QU_CW_B10_TAB	
		This MonthTop 10	PR_QU_CM_T10_TAB	
		This Month Bottom 10	PR_QU_CM_B10_TAB	
		This QuarterTop 10	PR_QU_CQ_T10_TAB	
		This Quarter Bottom 10	PR_QU_CQ_B10_TAB	
		This Year Top 10	PR_QU_CY_T10_TAB	
		This Year Bottom 10	PR_QU_CY_B10_TAB	
Sales Value and Units Sold			Yesterday All	PR_SU_YD_ALL_TAB
			This Week All	PR_SU_CW_ALL_TAB
		This Month All	PR_SU_CM_ALL_TAB	
		This Quarter All	PR_SU_CQ_ALL_TAB	
		This Year All	PR_SU_CY_ALL_TAB	
Units Abandoned		Yesterday Top 10	PR_QA_YD_T10_TAB	
		This weekTop 10	PR_QA_CW_T10_TAB	
		This MonthTop 10	PR_QA_CM_T10_TAB	
		This QuarterTop 10	PR_QA_CQ_T10_TAB	
		This Year Top 10	PR_QA_CY_T10_TAB	
Category: OrderSummary				
Sub category	Sub sub category	Report details	Report name	
		Daily	OS_OS_DA_ALL_TAB	
		Weekly	OS_OS_WK_ALL_TAB	
		Monthly	OS_OS_MO_ALL_TAB	
		Quarterly	OS_OS_QT_ALL_TAB	
		Yearly	OS_OS_YR_ALL_TAB	
Category: Demographic Sales Analysis				

Sub category	Sub sub category	Report details	Report name
Age Range	SalesValue and Units Sold	Yesterday	D1_SU_YD_ALL_TAB
		This week	D1_SU_CW_ALL_TAB
		This Month	D1_SU_CM_ALL_TAB
		This Quarter	D1_SU_CQ_ALL_TAB
		This Year	D1_SU_CY_ALL_TAB
Income Range	SalesValue and Units Sold	Yesterday	D2_SU_YD_ALL_TAB
		This week	D2_SU_CW_ALL_TAB
		This Month	D2_SU_CM_ALL_TAB
		This Quarter	D2_SU_CQ_ALL_TAB
		This Year	D2_SU_CY_ALL_TAB
Gender	SalesValue and Units Sold	Yesterday	D3_SU_YD_ALL_TAB
		This week	D3_SU_CW_ALL_TAB
		This Month	D3_SU_CM_ALL_TAB
		This Quarter	D3_SU_CQ_ALL_TAB
		This Year	D3_SU_CY_ALL_TAB
Maritalstatus	SalesValue and Units Sold	Yesterday	D5_SU_YD_ALL_TAB
		This week	D5_SU_CW_ALL_TAB
		This Month	D5_SU_CM_ALL_TAB
		This Quarter	D5_SU_CQ_ALL_TAB
		This Year	D5_SU_CY_ALL_TAB
Category: Time Period Sales Analysis			
Sub category	Sub sub category	Report details	Report name
Hours Of the Day	Sales Value	Yesterday All	HR_SV_YD_ALL_TAB
	Units Sold	Yesterday All	HR_QU_YD_ALL_TAB
Days Of the Week	Sales Value	This week	DW_SV_CW_ALL_TAB
	Units Sold	This week	DW_QU_CW_ALL_TAB
Days of the Month	Sales Value	This Month	DM_SV_CM_ALL_TAB
	Units Sold	This Month	DM_QU_CM_ALL_TAB
Weeks of the Month	Sales Value	This Month	WM_SV_CM_ALL_TAB
	Units Sold	This Month	WM_QU_CM_ALL_TAB
Months of the Quarter	Sales Value	This Quarter	MQ_SV_CQ_ALL_TAB
	Units Sold	This Quarter	MQ_QU_CQ_ALL_TAB
Months of the Year	Sales Value	This Year	MY_SV_CY_ALL_TAB
	Units Sold	This Year	MY_QU_CY_ALL_TAB
Quarters of the	Sales Value	This Year	QY_SV_CY_ALL_TAB

Year			
	Units Sold	This Year	QY_QU_CY_ALL_TAB
Category: Sales by Account			
Sub category	Sub sub category	Report details	Report name
Sales Value and Units Sold		Yesterday	AC_SU_YD_ALL_TAB
		This week	AC_SU_CW_ALL_TAB
		This Month	AC_SU_CM_ALL_TAB
		This Quarter	AC_SU_CQ_ALL_TAB
		This Year	AC_SU_CY_ALL_TAB
Category: Sales by Contract			
Sub category	Sub sub category	Report details	Report name
Sales Value and Units Sold		Yesterday	CO_SU_YD_ALL_TAB
		This week	CO_SU_CW_ALL_TAB
		This Month	CO_SU_CM_ALL_TAB
		This Quarter	CO_SU_CQ_ALL_TAB
		This Year	CO_SU_CY_ALL_TAB
Category: Geographic Sales Analysis			
Sub category	Sub sub category	Report details	Report name
Country	Sales Value and Units Sold	Yesterday	G1_SU_YD_ALL_TAB
		This week	G1_SU_CW_ALL_TAB
		This Month	G1_SU_CM_ALL_TAB
		This Quarter	G1_SU_CQ_ALL_TAB
		This Year	G1_SU_CY_ALL_TAB
State	Sales Value and Units Sold	Yesterday	G2_SU_YD_ALL_TAB
		This week	G2_SU_CW_ALL_TAB
		This Month	G2_SU_CM_ALL_TAB
		This Quarter	G2_SU_CQ_ALL_TAB
		This Year	G2_SU_CY_ALL_TAB
City	Sales Value and Units Sold	Yesterday	G3_SU_YD_ALL_TAB
		This week	G3_SU_CW_ALL_TAB
		This Month	G3_SU_CM_ALL_TAB
		This Quarter	G3_SU_CQ_ALL_TAB
		This Year	G3_SU_CY_ALL_TAB
Postal Code	Sales Value and Units Sold	Yesterday	G4_SU_YD_ALL_TAB
		This week	G4_SU_CW_ALL_TAB
		This Month	G4_SU_CM_ALL_TAB
		This Quarter	G4_SU_CQ_ALL_TAB
		This Year	G4_SU_CY_ALL_TAB
Category: Campaign			
Sub category	Sub sub category	Report details	Report name
Impression Displayed		Yesterday All	CA_DI_YD_ALL_TAB
		Yesterday Top 1	CA_DI_YD_T10_TAB
		This week All	CA_DI_CW_ALL_TAB

		This week Top 10	CA_DI_CW_T10_TAB
		This Month All	CA_DI_CM_ALL_TAB
		This Month Top 10	CA_DI_CM_T10_TAB
		This Quarter All	CA_DI_CQ_ALL_TAB
		This Quarter Top 10	CA_DI_CQ_T10_TAB
		This Year All	CA_DI_CY_ALL_TAB
		This Year Top 10	CA_DI_CY_T10_TAB
Average Views and Clicks		Yesterday All	CA_CI_YD_ALL_TAB
		Yesterday Top 1	CA_CI_YD_T10_TAB
		This week All	CA_CI_CW_ALL_TAB
		This week Top 10	CA_CI_CW_T10_TAB
		This Month All	CA_CI_CM_ALL_TAB
		This Month Top 10	CA_CI_CM_T10_TAB
		This Quarter All	CA_CI_CQ_ALL_TAB
		This Quarter Top 10	CA_CI_CQ_T10_TAB
		This Year All	CA_CI_CY_ALL_TAB
		This Year Top 10	CA_CI_CY_T10_TAB
Category: Initiative			
Sub category	Sub sub category	Report details	Report name
Impression Displayed		Yesterday All	IN_DI_YD_ALL_TAB
		Yesterday Top 10	IN_DI_YD_T10_TAB
		This week All	IN_DI_CW_ALL_TAB
		This week Top 10	IN_DI_CW_T10_TAB
		This Month All	IN_DI_CM_ALL_TAB
		This Month Top 10	IN_DI_CM_T10_TAB
		This Quarter All	IN_DI_CQ_ALL_TAB
		This Quarter Top 10	IN_DI_CQ_T10_TAB
		This Year All	IN_DI_CY_ALL_TAB
		This Year Top 10	IN_DI_CY_T10_TAB
Average Views and Clicks		Yesterday All	IN_CI_YD_ALL_TAB
		Yesterday Top 10	IN_CI_YD_T10_TAB
		This week All	IN_CI_CW_ALL_TAB
		This week Top 10	IN_CI_CW_T10_TAB
		This Month All	IN_CI_CM_ALL_TAB
		This Month Top 10	IN_CI_CM_T10_TAB
		This Quarter All	IN_CI_CQ_ALL_TAB
		This Quarter Top 10	IN_CI_CQ_T10_TAB
		This Year All	IN_CI_CY_ALL_TAB
		This Year Top 10	IN_CI_CY_T10_TAB
Category: E-Marketing Spot			
Sub category	Sub sub category	Report details	Report name
Impression Displayed		Yesterday All	MP_DI_YD_ALL_TAB
		Yesterday Top 10	MP_DI_YD_T10_TAB
		This week All	MP_DI_CW_ALL_TAB
		This week Top 10	MP_DI_CW_T10_TAB
		This Month All	MP_DI_CM_ALL_TAB

		This Month Top 10	MP_DI_CM_T10_TAB
		This Quarter All	MP_DI_CQ_ALL_TAB
		This Quarter Top 10	MP_DI_CQ_T10_TAB
		This Year All	MP_DI_CY_ALL_TAB
		This Year Top 10	MP_DI_CY_T10_TAB
Average Views and Clicks		Yesterday All	MP_CI_YD_ALL_TAB
		Yesterday Top 10	MP_CI_YD_T10_TAB
		This week All	MP_CI_CW_ALL_TAB
		This week Top 10	MP_CI_CW_T10_TAB
		This Month All	MP_CI_CM_ALL_TAB
		This Month Top 10	MP_CI_CM_T10_TAB
		This Quarter All	MP_CI_CQ_ALL_TAB
		This Quarter Top 10	MP_CI_CQ_T10_TAB
		This Year All	MP_CI_CY_ALL_TAB
		This Year Top 10	MP_CI_CY_T10_TAB
Category: Campaign/Initiative/E-Marketing Spot Combination			
Sub category	Sub sub category	Report details	Report name
Impression Displayed		Yesterday Top 10	IM_DI_YD_T10_TAB
		This week Top 10	IM_DI_CW_T10_TAB
		This Month Top 10	IM_DI_CM_T10_TAB
		This Quarter Top 10	IM_DI_CQ_T10_TAB
		This Year Top 10	IM_DI_CY_T10_TAB
Average Views and Clicks		Yesterday Top 10	IM_CI_YD_T10_TAB
		This week Top 10	IM_CI_CW_T10_TAB
		This Month Top 10	IM_CI_CM_T10_TAB
		This Quarter Top 10	IM_CI_CQ_T10_TAB
		This Year Top 10	IM_CI_CY_T10_TAB

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