Apparo Fast Edit

Cognos Version

Training Guide for the first steps

Table of Contents

1 Introduction 7

1.1 What is Apparo Fast Edit 7

1.2 What were the driving forces behind the development? 7

1.3 Resulting cornerstones of Apparo Fast Edit 7

1.4 Target groups and goal of this tutorial 8

1.5 Technical requirements 8

1.6 Basic Handling 8

2 Main Concepts 9

2.1 Databases and Users 9

2.2 Usage of Apparo Fast Edit 10

2.3 Business Cases (BC) 10

2.4 Business Case types 10

3 Clients 12

3.1 Definition 12

3.2 Creating a new client 13

3.2.1 Client head 13

3.2.2 Client security groups 14

3.2.3 General settings 14

3.2.4 Usable languages 15

3.2.5 Default formats 15

3.2.6 Access rights 16

3.2.7 Automatic table/column creation 17

3.2.8 Excel export formats 18

3.2.9 Business Log 18

3.3 Templates, Styles, Colors and Fonts 19

3.3.1 Theme.css 19

3.3.2 Favicon.ico 20

3.3.3 Fonts.properties 21

3.3.4 Colors.properties 21

4 The Apparo Designer 22

4.1 Introduction 22

4.2 Start screen with a list of all Business Cases 22

4.3 Definition 22

4.4 Buttons and Sorting 22

4.5 Folder 24

4.6 Description and normal mode 25

4.7 Database connections 26

4.7.1 Buttons 26

4.7.2 Creating a new database connection 26

4.7.3 Settings of the tab ‚Main' 26

5 Creating a Table Business Case (TBC) 27

5.1 Introduction 27

5.2 Areas of a Table Business Case 27

5.3 Create a new Business Case 28

5.4 Business Case Functions 29

5.5 Features areas and features 30

5.6 Edit view of the Business Case 31

5.7 Business Case Settings 32

5.7.1 Main settings 32

5.8 Widgets 33

5.8.1 Edit view 33

5.9 Widget types and areas 34

5.10 Widgets in the Edit Area 35

5.11 Special functions in the widget settings 36

5.12 Reading and Writing Expressions 36

5.13 Conditional options 37

5.14 Widget settings for the example ‚Input field' 39

5.14.1 Mapping & Other 39

5.14.2 Flags 40

5.14.3 Visual 44

5.14.4 Visual help texts 45

6 Single Business Cases (SBC) 46

6.1 Structure of the SBC 46

6.2 Arrangement of the widgets in the SBC 47

6.2.1 Columns - a users view 48

6.3 Visual 49

7 Combining Business Case 51

7.1 Business Case Set 51

7.2 Master-detail relationship 51

7.3 Primary Keys 52

8 Create a portal entry for a Business Case 53

9 Creating database table and columns with the Designer 54

9.1 Activation of the feature in the client settings 54

9.2 Create the required database connections 54

9.3 Create a database connection to create tables / columns (DDL) 55

9.4 Creating and linking the DB connection type ‚read / write only (DML) ' 57

9.5 Automatically create a database table when creating new Business Cases 57

10 E-mail Business Cases (EBC) 60

10.1 Creating an EBC 61

10.2 Header and Footer 61

10.3 E-mail properties 62

10.4 E-Mail body 63

10.5 Button titles 63

11 E-Mail Import Business Case (EIBC) 64

11.1 Creating a new Business Case of Type 'Email Import' 66
11.1.1 New Business Case - Main Settings 67

11.2 Overview of all possible settings 68

11.3 Main Settings 68

11.4 Importing Groups 69

11.5 Importing group settings 69
11.5.1 Main group settings 69
11.5.2 Business Cases 70
11.5.3 Add new attachment 70
11.5.4 Advanced Excel document data constraints 71
11.5.5 Email texts 72
11.5.6 Security 73

11.6 eMails 74

11.7 Logging 75

11.8 Variables 76

12 Action Business Cases (ABC) 77

12.1 Example for calling a database function using AJAX 78
12.1.1 Create a new Action Business Case 78
12.1.2 Define a report variable 79
12.1.3 Define the actions 81
12.1.4 Creating the Cognos Report Studio report 82
12.1.5 Creating new Report Studio report 83
12.1.6 Database function definition 87

13 Business Case Sets (Set) 88

13.1 Selection and positioning of business cases in the set (Set) 88

13.2 Colors 89

13.3 Tab Widths 89

13.4 Global Set filters 90

14 Linking BC as Master-Detail connection 91

14.1 Master-Detail basics 91

15 Optimizing Business Cases 93

15.1 Securing data quality 93
15.1.1 Data output format 93
15.1.2 Data Quality check 95
15.1.3 Data row validation 96

15.2 Tracking of data changes 97
15.2.1 Auditing of data changes 97
15.2.2 Data History 99

16 Adding a Business Case into a Cognos report 101

17 Calling external scripts / procedures / functions 106

17.1 Own action buttons 106

17.2 Executable button 106
17.2.1 General Settings 106
17.2.2 Dialog visual 108
17.2.3 Information texts 108
17.2.4 Features 109

17.3 Database procedure button 110
17.4 URL buttons 112
17.5 E-mail Buttons 112
17.6 Pre/Post execution 113
18 Filter data output 115
18.1 Filter widgets 116
18.2 Filtering prompt page settings 116
18.3 Combine Widgets with AND/OR 116
19 Variables 117
19.1 Definition 117
19.2 Use of variables in the Designer 118
19.2.1 Variables in lookup definitions 118
19.2.2 Variables in labels, hint texts, the header and footer 118
19.2.3 Variables in filter definitions: 118
19.2.4 Variables used in data validations 119
19.2.5 Variables in variables 120
19.3 Internal Variables 121
19.4 Report Variables 122
19.5 SQL Variables 123
19.6 Script Variables 125
19.7 Widget reference variables 126
19.8 Environmental variables 127
19.9 Debugging variables 128
19.9.1 Definition 128
19.9.2 Variable output for debugging purposes 128
19.9.3 Debugging script variables 129
19.9.4 Debugging SQL variables 131
20 Data hierarchies 132
20.1 What do we need? 132
20.2 Expected result 133
20.3 Implementation 134
20.3.1 Creation of the Business Cases 134
20.3.2 Customizing of the Business Case 135
21 Excel Import 137
21.1 General Excel Import 138
21.2 Import strategy 139
21.3 Manual Import using copy & paste 141
21.4 Excel File Import 142
21.5 Automatic Excel file import 144
22 Conditional formatting 146
22.1 Background color 146
22.1.1 Widget background 146
22.2 Row background color 147

22.3 Conditional formatting using HTML & JavaScript 148
22.3.1 Colored text for Status Controlling 148
22.3.2 Arrows for the ‚Trend' widget 149
23 Movies 150
24 Support 151

1 Introduction

1.1 What is Apparo Fast Edit

- Apparo Fast Edit is bridging the gap between the IT and the business departments, making it easy for managers, accountants etc. **to create forms, data entry masks and even complex workflows for quick data input** without special knowledge in a programming language.

- Apparo Fast Edit is **a high-performance data entry software**. With it, you can enter, edit, delete data and also easily import data from Excel files in different ways (via email, via copy&paste or as file import).

- With Apparo Fast Edit, you can

  a) **build stand-alone data entry solutions,** or
  b) **extend your BI reporting system (e.g. IBM Cognos BI) or your enterprise portal**

1.2 What were the driving forces behind the development?

- Reporting and Data Entry should be connected.

- Business requirements should be implemented very flexibly.

- Business departments want fast solutions, without waiting for IT development.

- System should be integrated completely in BI or enterprise portal systems.

- Software should be able to expand and grow depending on needs.

- Software should be easy to use, also by business departments.

1.3 Resulting cornerstones of Apparo Fast Edit

- Forms definable in the Apparo Designer, without programming knowledge.

- Powerful variables and scripts or database procedures to maximize the flexibility

- Security based on existing authorization system (e.g. LDAP, Active Directory)

- Data quality must be secured by possible input validation of data types and values.

- Excel and CSV import possible (manual or automatic), also handling of file attachments.

Due to its many features Apparo Fast Edit can be adapted to fit almost any need.
The online help in the Apparo Designer helps to start immediately by giving explanations and hints on all features and settings.

There are two sides of Apparo Fast Edit

*- the **Backend** (Apparo Designer), on which forms, masks and Workflows are set up as so-called Business Cases*

*- and the **Frontend**, on which these forms are filled with data.*

1.4 Target groups and goal of this tutorial

- The target groups of Apparo Fast Edit are persons who create and edit data entry forms, for example in business units. No programming knowledge is necessary!

- The focus of this tutorial is to explain the basic thoughts and models that are necessary to translate a problem into a Fast Edit Business Case, and to highlight important features.

- After completing this tutorial, the user should be able to create simple and also complex Business Cases so that data can be entered easily and quickly into reports, dashboards, mask and forms into any relational database.

This tutorial is intended to help you through the first steps with Fast Edit. It also touches many more advanced topics to give you an overview over the vast possibilities.
You can find extensive information about the Fast Edit features in the document “User Guide”.

1.5 Technical requirements

1. Apparo Fast Edit has to be installed and started.

2. A web browser has to be available, as Apparo Fast Edit is a web-based software.

3. The BI system has to be installed and ready.

4. As the language of the Fast Edit interface and the tutorial is English, basic English knowledge is necessary.

5. No BI Installation is needed for the standalone version.

1.6 Basic Handling

- *Fields with an *(asterisk) have to be filled in.*

Since Apparo Fast Edit works with databases and tables, buttons like “OK”, “Cancel” etc. have a defined effect in terms of database transactions.

a) **“OK” (without a “Close” available)**: All changes are stored in the database and the Business Case is closed.
b) **“OK” (with a “Close” available)**: All changes are stored in the database.
c) **“Close”**: All changes are stored in the database and the Business Case is closed.
d) **“Cancel”**: Rolls back database transaction(s). No changes are saved.

Note:

- *“OK” and “Close” are sending a COMMIT command.*
- *All button texts can be changed in the Apparo Designer on the “Button Titles” register, but this will not change their effect.*
- *If the feature ‘auto commit’ is enabled all changes are stored immediately.*

2 Main Concepts

In the following section, you will find a general overview of the main concepts and the technological background of Apparo Fast Edit.
For more technical information on the subject, please refer to the “System Architecture” document.

2.1 Databases and Users

Example: IBM Cognos BI & Apparo Fast Edit

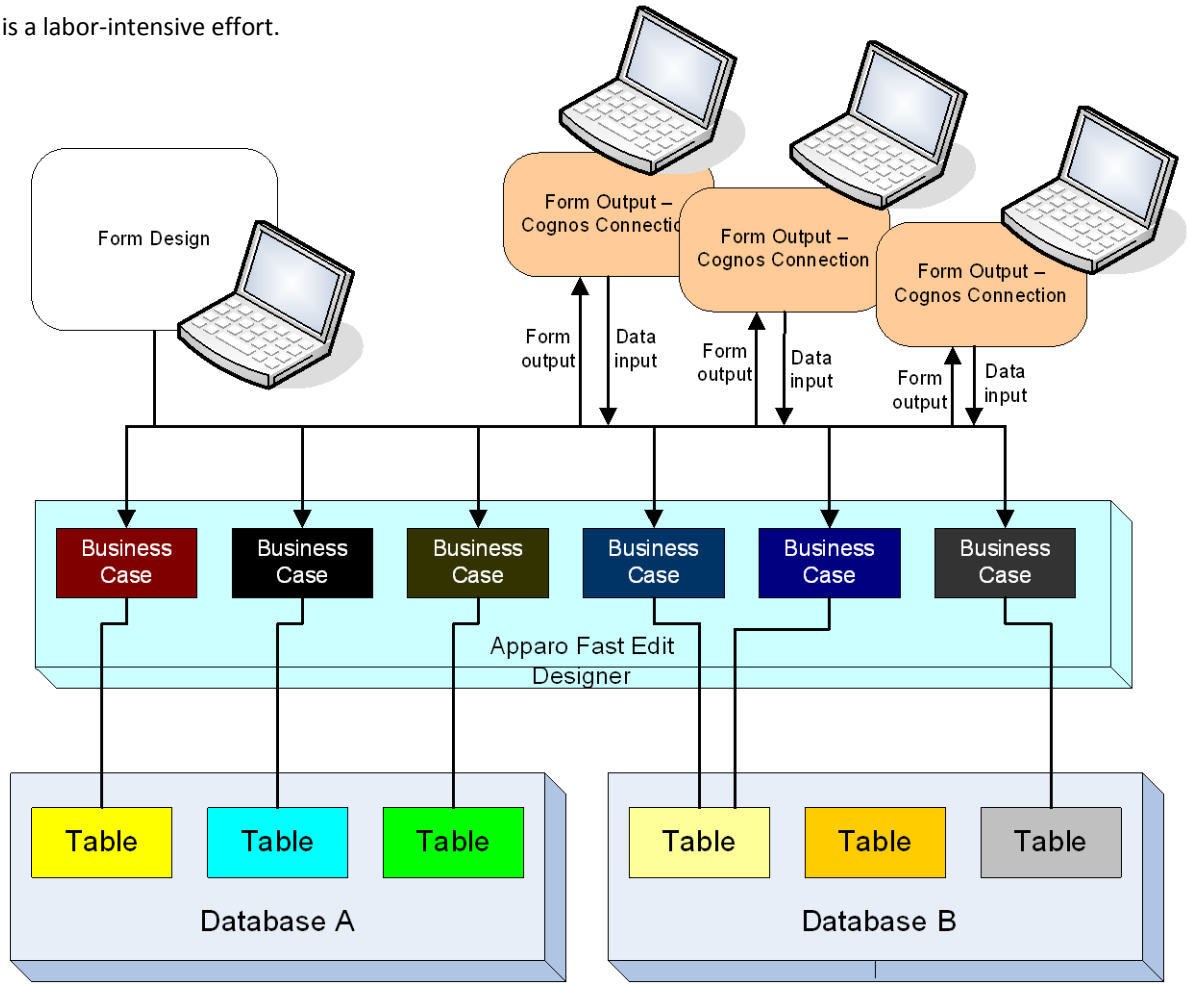
Apparo Fast Edit bridges the gap between the database, the form designer and the user.

IBM Cognos BI is a software that is optimized for data output.

That means:

a) setting up the input forms and
b) adding the data

is a labor-intensive effort.



With Apparo Fast Edit, a power user can build forms and masks which refer to tables in the database without any programming knowledge.

Members of the same or other business departments can use these forms for quick data entry in stand-alone forms or within a Cognos Report.

2.2 Usage of Apparo Fast Edit

Apparo Fast Edit is intended for collecting any type of data, changing of data and for the output of data.

Typical use cases of Apparo Fast Edit are the maintenance of:

- Master data
- Addresses
- Personnel data
- Project times and status
- User designations, lists and codes
- Report distribution (bursting table)
- …basically any kind of figures, measures, survey results, plan data etc.

In addition, you can comment on Control Reports and release the comments.

2.3 Business Cases (BC)

The cornerstones of Apparo Fast Edit are the so-called Business Cases.
Each Business Case is an application that can be started in a Business Intelligence System or stand-alone.
A Business Case contains input fields, prompts, logos, lookups, titles, buttons and functionality like deleting data, inserting, Excel-import and so on.

- While you can include more than one database and table in your Apparo Fast Edit set-up, each Business Case refers to only one table/view (lookups can refer to a different table).

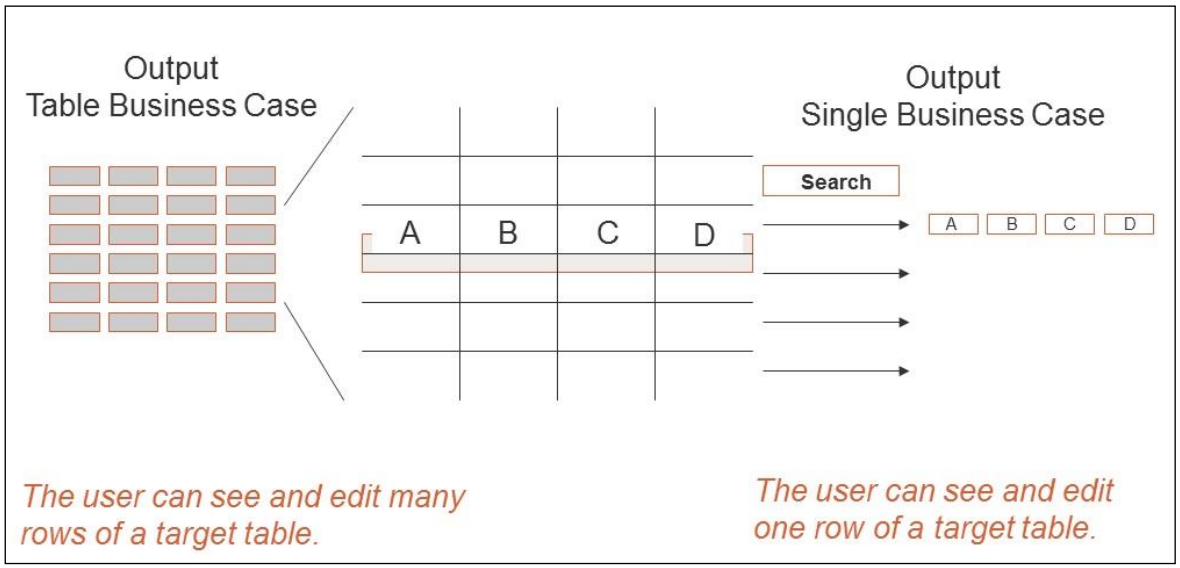
- If you want to combine data of different tables, you need to use e.g. a master-detail relationship between Business Cases, as explained in the section “Linking Business Cases as Master-Detail connection“.

- You can filter the displayed data of a Business Case by another table (e.g. country > factory > personnel display). This is called a data hierarchy and explained in the section “Optimizing Business Cases”.

2.4 Business Case types

Business Cases come in four slightly different types:

- the Table Business Case (TBC) and
- the Single Business Case (SBC)
- the Email Business Case (EBC) to send emails
- the Email Import Business Case to import data sent by emails



Similarities:

- Can be used with search fields, filters, buttons…

Differences:

Table Business Case (TBC)

- Shows data of a whole database table (one row at a time for full display).
- Fewer available widget types than for the single Business Case, due to restrictions in display space (one table per screen).

Single Business Case (SBC)

- Shows only the columns of one database table row. (Via Search next rows available.)
- More widgets types than the table Business Case, due to less restriction in space (only one data set per screen).

Typical cases for Single Business Cases:

- Data entry in a single data record
- Display of detailed entries from a table Business Case.
- Data entry of product or staff details.

Typical cases for a Table Business Cases:

- Data entry
- Display of long data lists.
- Data entry from Excel sheets
- Data export into Excel

When you open a single Business Case report, you can transport primary key(s) and report variables to the Business Case.

3 Clients

3.1 Definition

Clients facilitate the **management of different business units**.

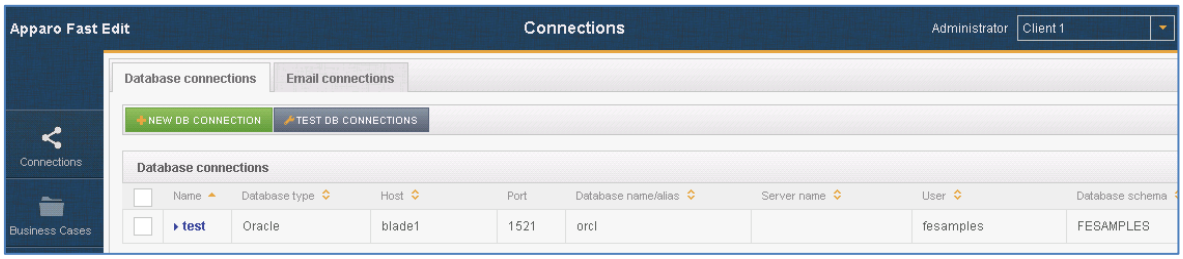
They enable the strict separation of the administration of the business cases in the designer and the easier separation of data from different departments.

Only super-users can create or edit clients, designer users don't have access to this feature.

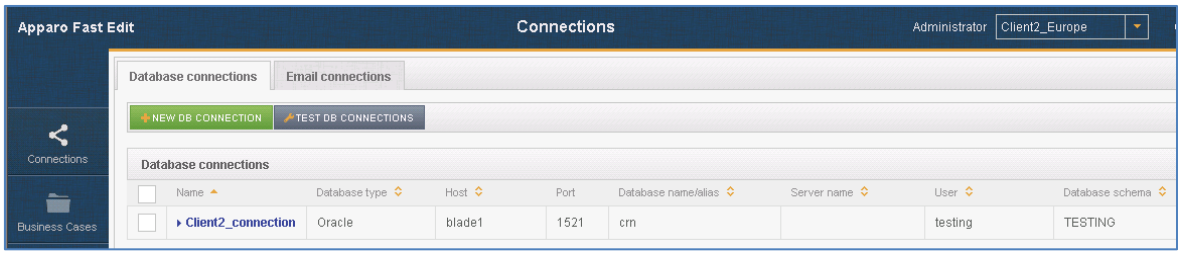
Every user group can be assigned to one or more clients.

Is a user assigned to more than one client, he can select the client he wants to use in top right corner.

Each client represents a capsulated Apparo Fast Edit environment with own connections, Business Cases, language, settings and security:



Database connections of 'Client 1'



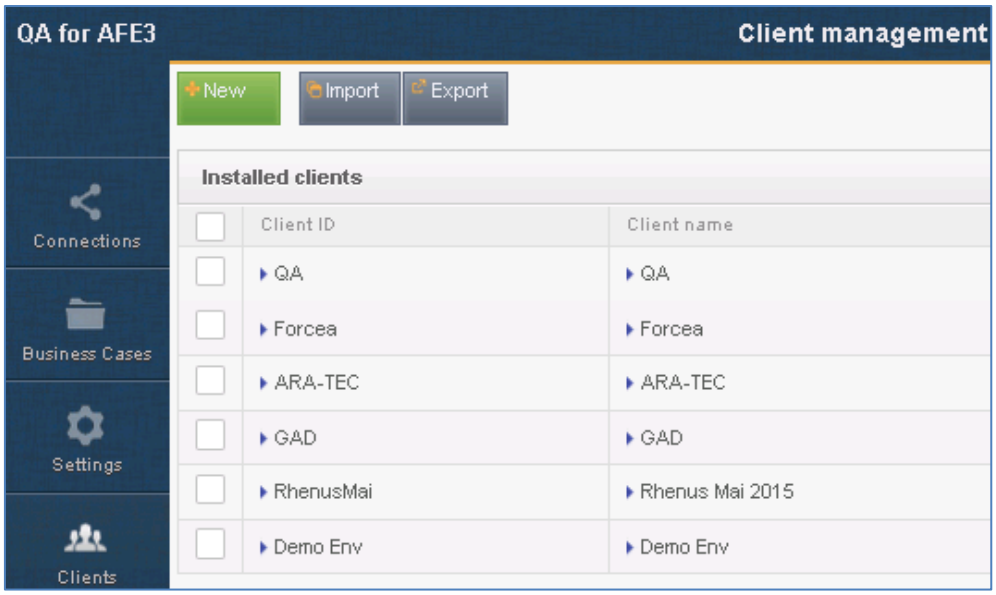
Database connections of 'Client2_Europe'

Business Case of 'Client 1'

Business Cases of 'Client2_Europe'

3.2 Creating a new client

The client tab can be opened with the button on the left menu. Click on 'New' to add a client:

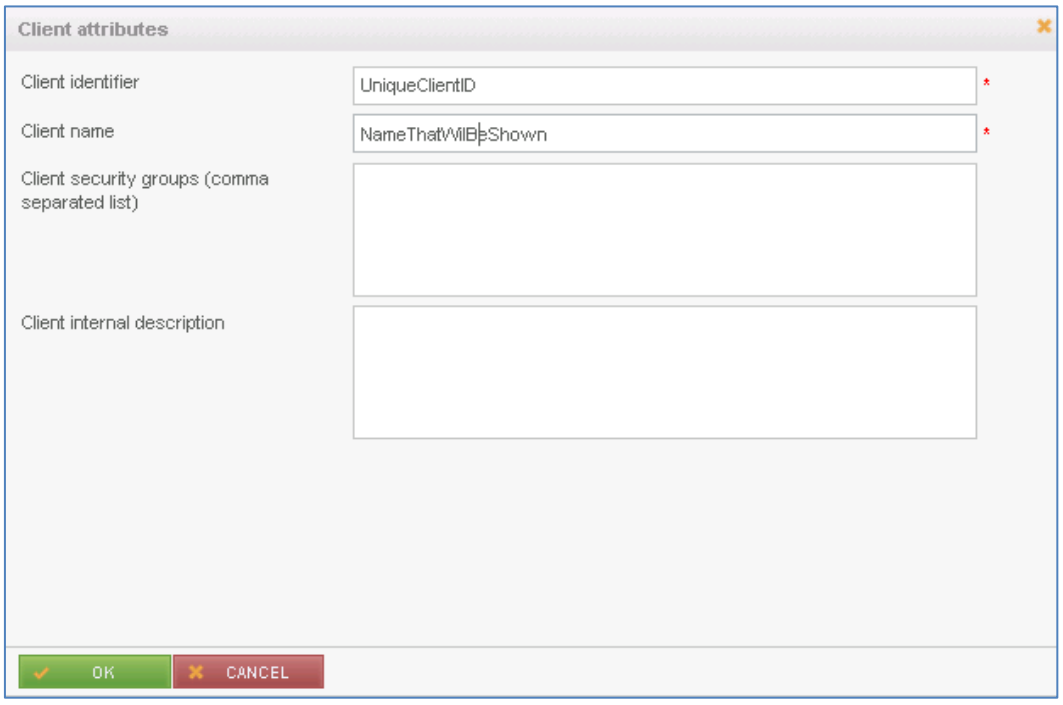


Clients can be imported and exported

3.2.1 Client head

When creating a client you will be asked to fill these main settings:

- **Client identifier** = unique ID
- **Client name** = name, that will be shown
- **Client security groups** = assign security groups to this client
- **Client internal description** = description text for documentation purposes



Click 'OK' to move on

3.2.2 Client security groups

This security groups are used to assign and to check the authorization.

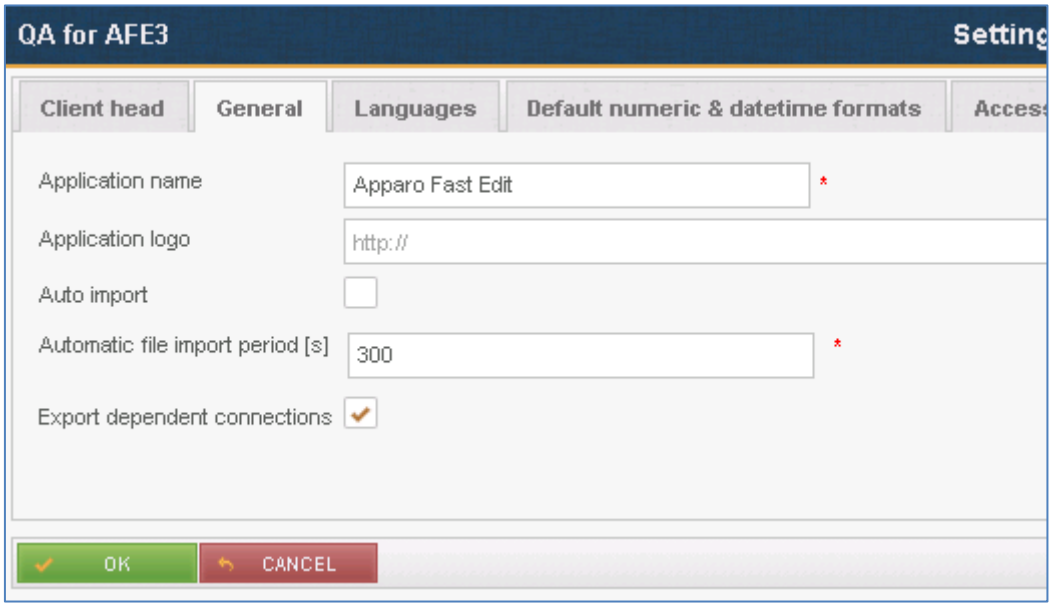
Authorization:
Apart from administrators are only users who are members of the entered security groups, entitled to run the Business Cases of this client.

Assignment:
When you open a Business Case without client ID, e.g. from a BI report or an e-mail, the security group of clients will be used to assign the appropriate Business Case.
Without security group or if the user is member of more than on client, the allocation of Business Cases with the same ID, existing in different clients, is based on the order of the clients in the list from top to bottom.

3.2.3 General settings

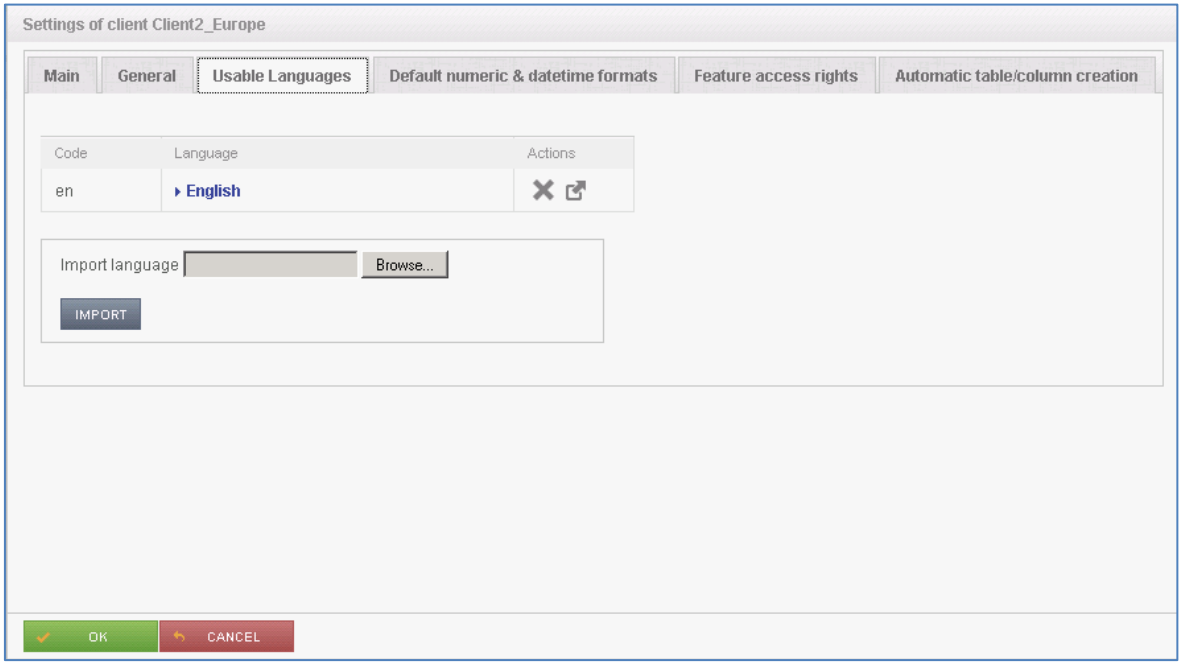
The general settings are containing these properties:

- **Application name** = This name is shown in the top left corner. Default is 'Apparo Fast Edit'
- **Application logo** = Optional. A logo can be shown next to the application name
- **Auto import** = Enables client-wide the automated file import (server background) feature
- **Import period** = When auto import is enabled, this is the interval in seconds to check the defined folders for new Excel files for the auto import feature



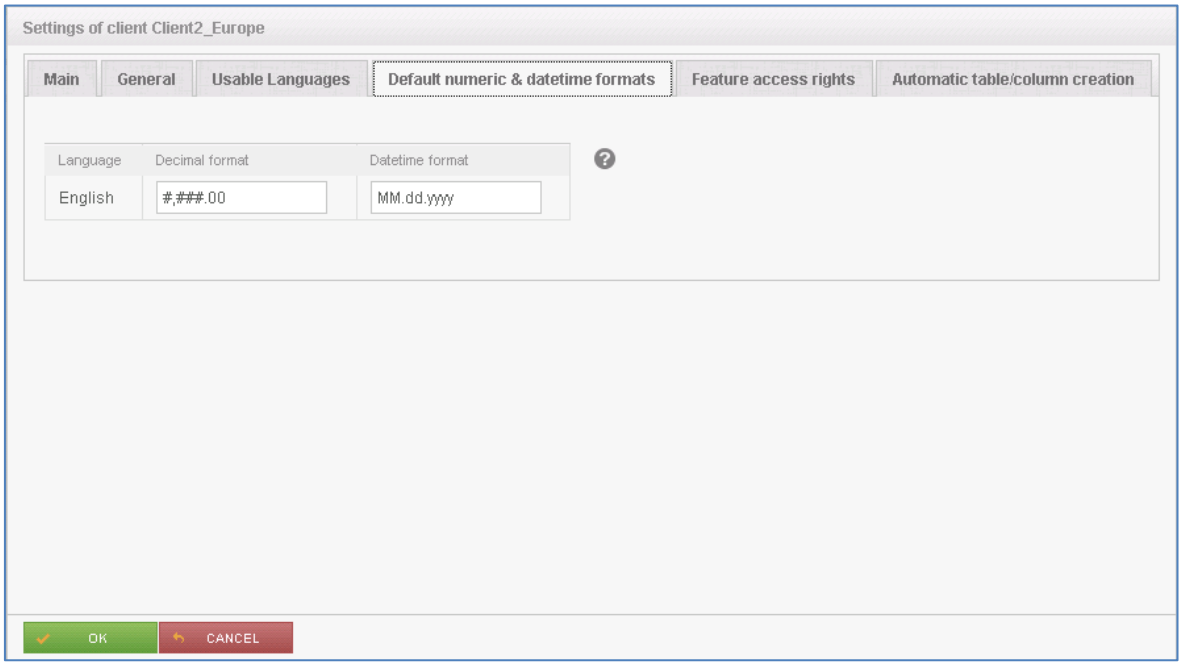
3.2.4 Usable languages

When creating a client there are no languages installed.
You can import them from: [APPARO_HOME]/FastEdit/languages



3.2.5 Default formats

In 'Default numeric & date time formats' you can adapt the defaults of these date types



Changing the decimal format is not implemented yet. Commas and thousands delimiter are controlled automatically by the users language.

3.2.6 Access rights

Define restrictions for accessing secured parts of Apparo Fast Edit. Only users with listed security groups will be able to access these particular functions.

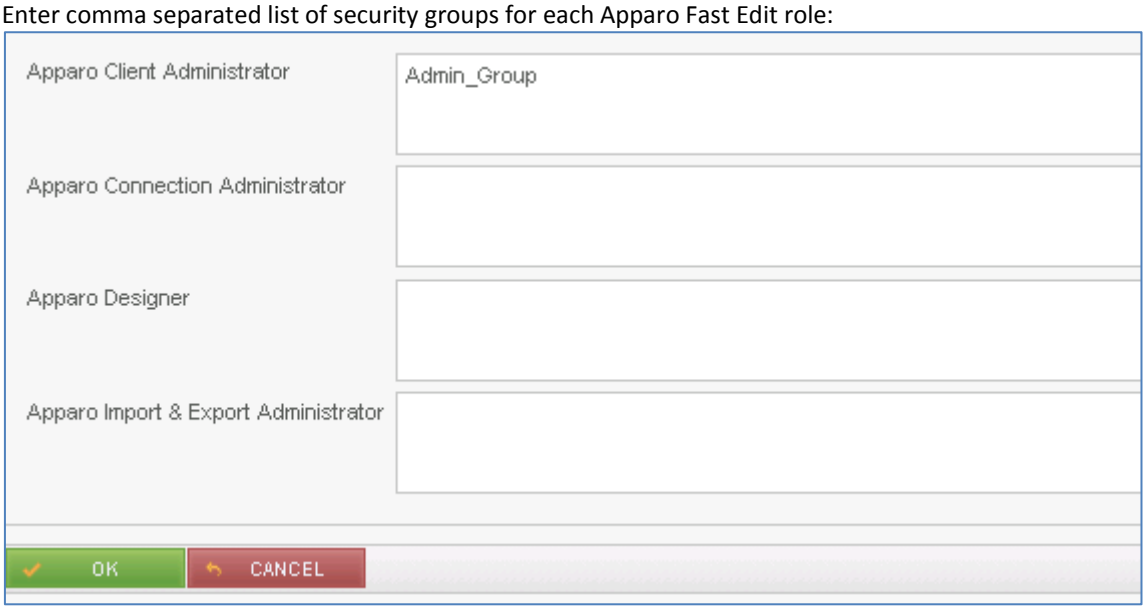
Apparo Client Administrator: has unrestricted access to all features of this client
If no security group is defined, all mapped users will have admin access, which means folder and BC-level access rights will have no impact.

Apparo Connection Administrator: can create, edit and delete database and email server connections

Apparo Designer: manages Business Cases - can create, delete and edit Business Cases and folders

Apparo Import & Export Administrator: can import and export Business Cases and connections

Enter comma separated list of security groups for each Apparo Fast Edit role:

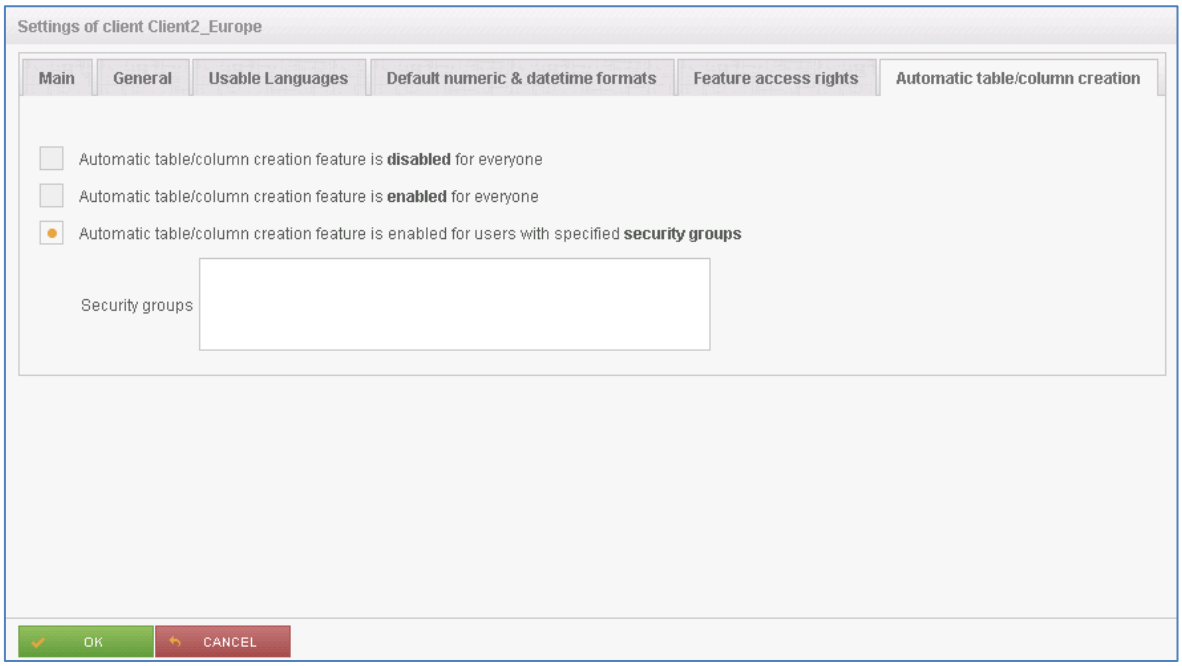


When empty, no restrictions are set.

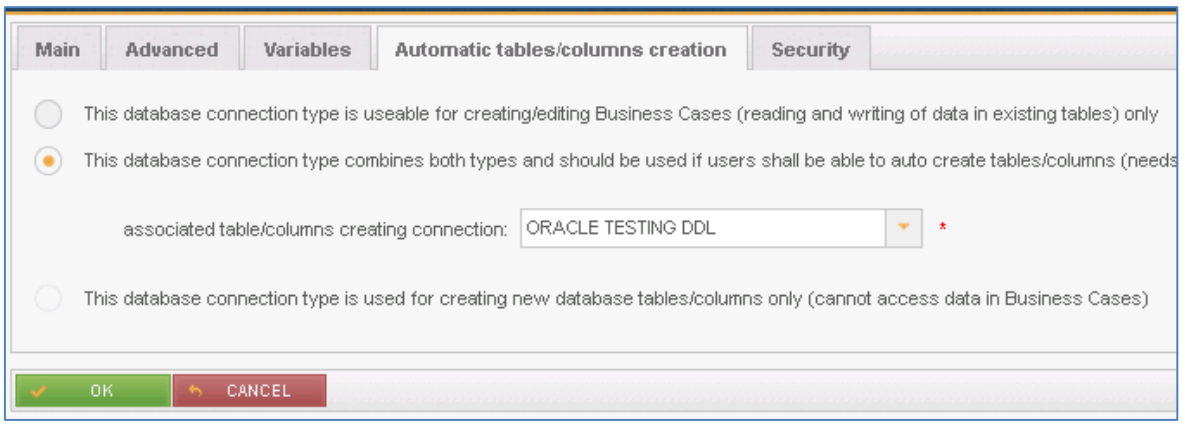
3.2.7 Automatic table/column creation

Defines the rights of designer users to use the automatic table creation feature.
When enabled, Apparo Fast Edit can create automatically tables or columns using a defined database connection.

This feature is disabled by default and can be enabled for everyone or for specified user groups only.



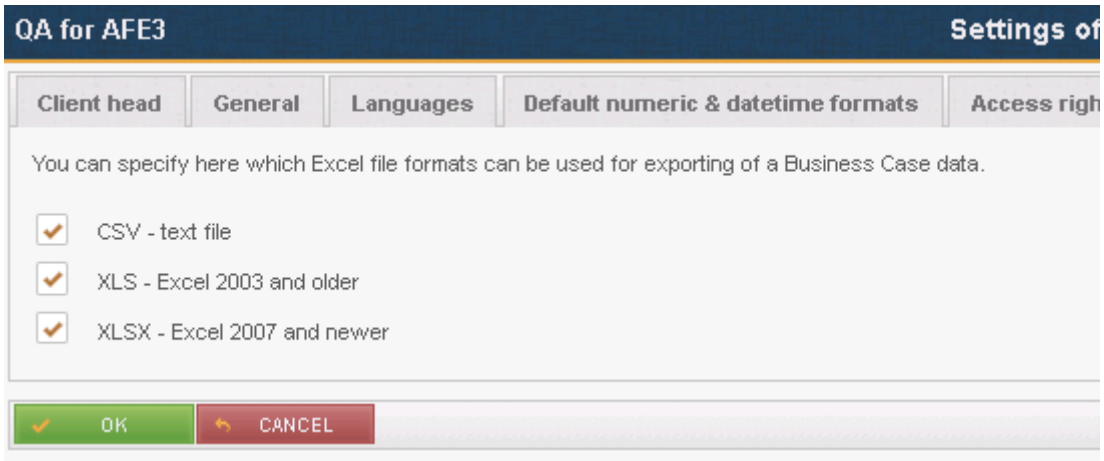
To use this feature you need a database connection of type DDL (This database connection type is used for creating new database tables/columns only) that will be mapped to database connection of type DML (This database connection type combines both types and should be used if users shall be able to auto create tables/columns)



This will be explained more detailed in a later chapter.

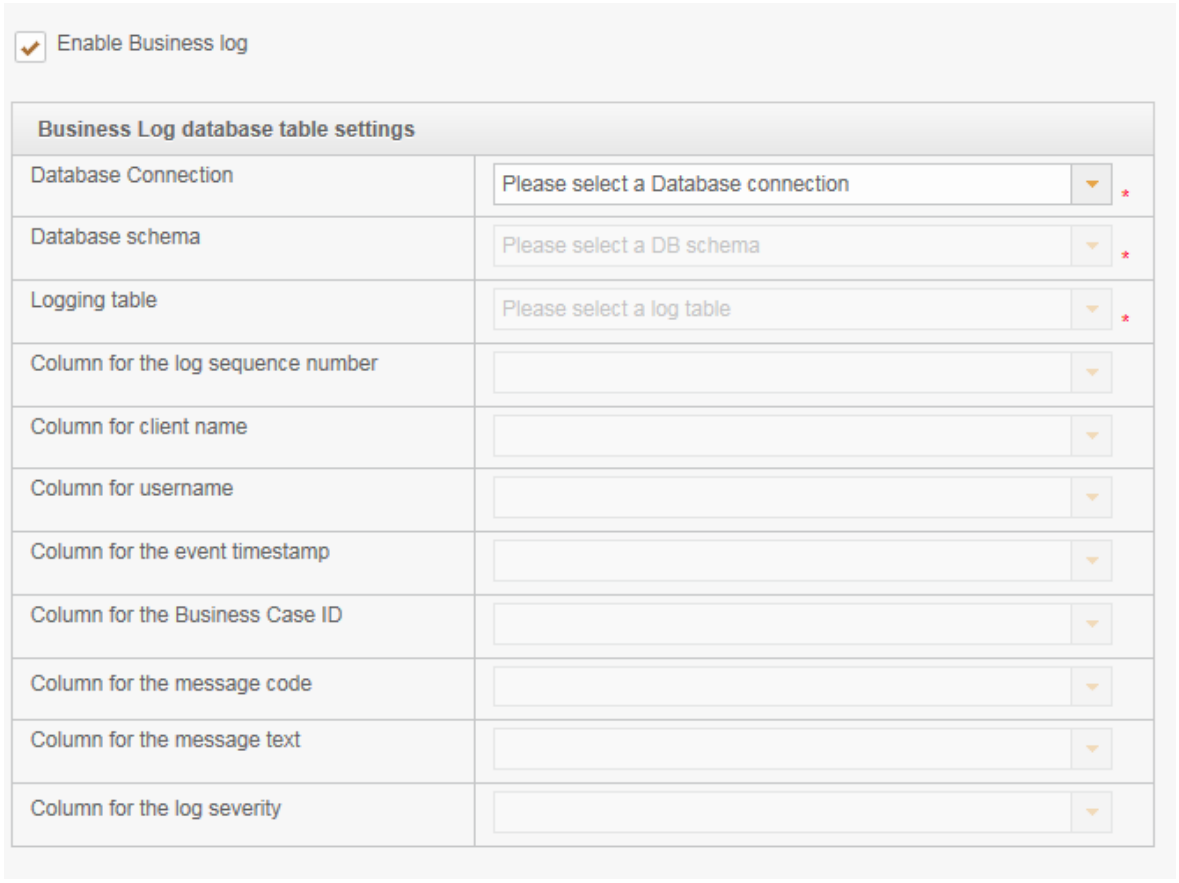
3.2.8 Excel export formats

To define the allowed excel export formats



3.2.9 Business Log

You can store all user activities (Business Cases, Designer) into a free definable database table.



3.3 Templates, Styles, Colors and Fonts

In the client folder you will find different ways to create your own templates and to define a preset design.

The files can be found in the folders for each client.
[APPARO_HOME]\FastEdit\clients\<Client ID>

- theme.css
- Favicon.ico
- Fonts.properties
- Colors.properties
- All pictures and backgrounds of the designer are stored in the subfolder "images"

3.3.1 Theme.css

The appearance of the designer and the business cases, you can change with CSS:

3.3.1.1 Styles for the Designer

The styles of the designer can be found in the accompanying commentary by theme.css.

Example

```
/* ------------------------------------------------------------------------------------------------------------ */
/* ------- BUSINESS CASE SETTINGS LEFT MENU ------------------------------------------------------------------ */
/* ------------------------------------------------------------------------------------------------------------ */

/* Menu items background */
div#designerForm\3A featureMenu,
div#settingsTab{
	border:none;
	background-color: #e0e0e0;
	background-image: url("images/menuBkg.png");
	background-repeat: repeat-y;
	background-clip: content-box;
	background-origin: content-box;
}
```

3.3.1.2 Styles for Business Cases

The colons used by the framework in the class designations have to be escaped in the CSS by \:
Unfortunately, this does not work in older Internet Explorer, so we use in the following examples, the hex code "\3A"

Examples for addressing labels in different business case areas in CSS

Hint: *!important* prevents overwritting of the setting

Filter area

```
#businessCaseUIForm\3A searcharea  label {
color: #00ff00 !important;
font-size: 2em !important;
}
```

Edit area, Widget-Label

```
#businessCaseUIForm\3A editareaHeader label{
```

```
color: #ccc !important;
font-size: 1.5em !important;
}
```

Calculation area

```
#businessCaseUIForm\3A calcarea label{
color: #000 !important;
font-size: 3em !important;
}
```

Bulk update area

```
#businessCaseUIForm\3A bulkupdatearea label{
color: #eee !important;
font-size: 3em !important;
}
```

Header and Footer

```
#businessCaseUIForm\3A header label{
color: #eee !important;
font-size: 3em !important;
}
```

Header or footer can be so addressed only as a unit, but as you can use HTML in header and footer, as well as in almost all settings, e.g. the widget label, you can easily address any elements by Span tags: " TEXT </ span>".

3.3.2 Favicon.ico

The favicon is a small graphic that is displayed by the browser usually in the address bar and / or in the tab:

If you replace this file, please remind the right format .ico

3.3.3 Fonts.properties

This file contains the settings for the font in the business cases.
Please note that **the settings apply only with newly created business cases.**

Example for the font settings of the widget label

#Default font settings for widget's "label"
bc.widget.label.fontface=Arial
bc.widget.label.size=12
bc.widget.label.style=bold

Example for the font settings of the widget texts

#Default font settings for widget
bc.widget.text.fontface=Arial
bc.widget.text.size=12
bc.widget.text.style=normal

3.3.4 Colors.properties

To define the default colors for business cases of a client

Excerpt:

#BusinessCase
businessCase.bgColorHeader=FFFFFF
businessCase.bgColorFooter=FFFFFF
businessCase.windowBgColor=FFFFFF
businessCase.fontTitleHeader.color=000000
businessCase.fontDescriptionHeader.color=000000
businessCase.fontTitleFooter.color=000000
businessCase.fontDescriptionFooter.color=000000

This file contains all possible color settings for the business cases.
These colors are the default colors if not explicitly one color has been overridden in the business case.

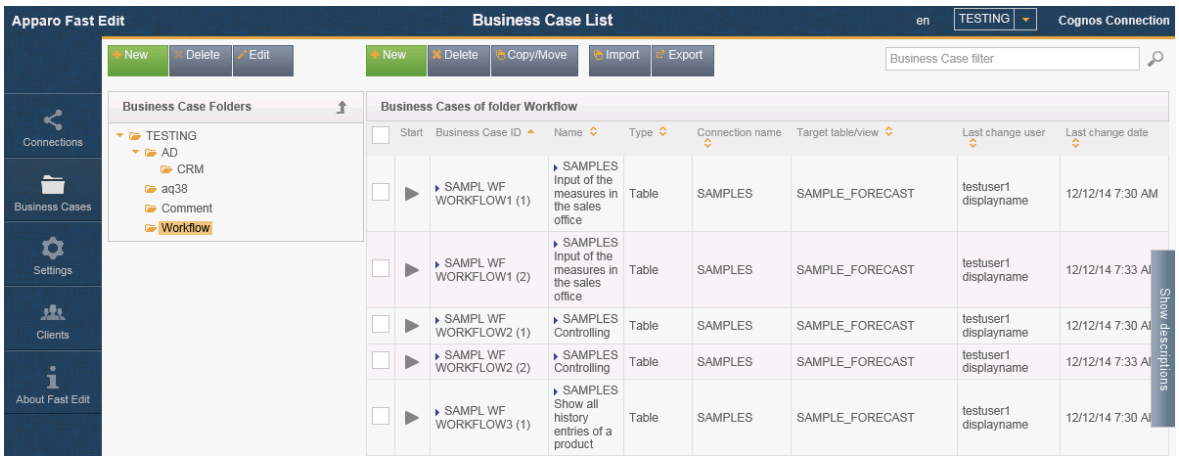
That means depending on the client a business case can automatically use different colors.

4 The Apparo Designer

4.1 Introduction

In the following section, you will be introduced to the Apparo Designer.
The Apparo Designer is the area in which the Business Cases or Business Case sets are created. Anything from the database connection to the data fields, access rights, archiving, corporate design, data import etc. is defined here.

4.2 Start screen with a list of all Business Cases



At the start of the Apparo Designer, you will see a list of all business cases that are stored in the Apparo Repository. If the Apparo Repository does not contain any definition, this list will have no entries.

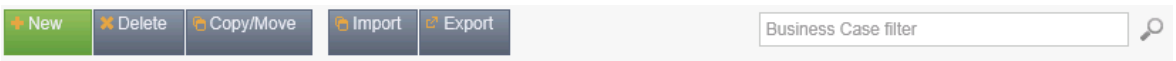
4.3 Definition

Each business case is an own application that can be called separately.

Business cases can be linked together, so that from the user's perspective, a business case can also consist of several masks.

All business cases are stored in the Apparo Repository, which is a separate database.

4.4 Buttons and Sorting



The following buttons are at your disposal:

- New - creates a new Business Case
- Delete - deletes all selected Business Cases
- Copy - copies all selected Business Cases
- Import - imports Business Cases from a file
- Export - exports selected Business Cases into a file
- Filter - filters all business cases from the input string by its ID

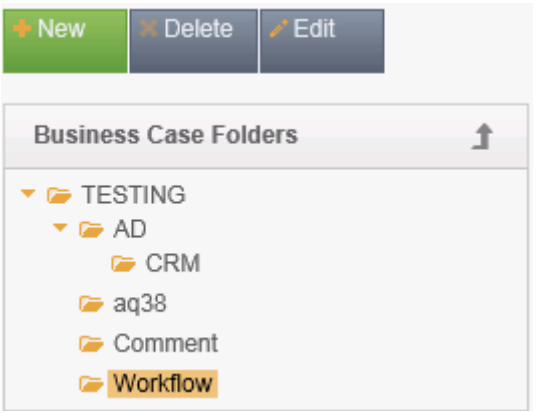
The sort can be changed by clicking the orange arrows:

Start	Business Case ID	Name	Type	Connection name	Target table/view	Last change user	Last change date

4.5 Folder

Business Cases can be grouped in folders. Inside the folder you can create subfolders.

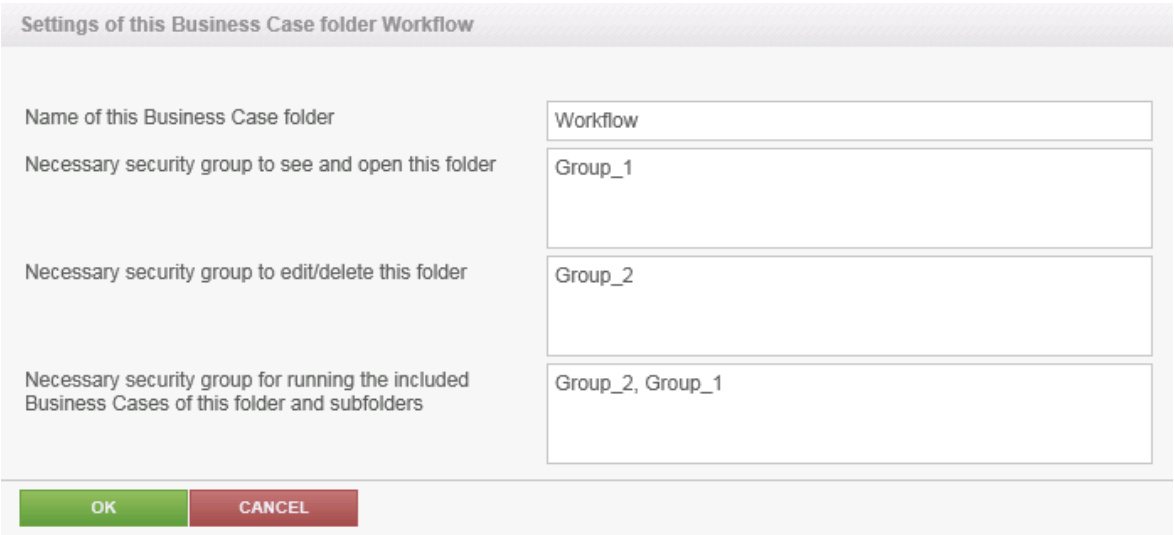
For the Folders pane, there are three buttons:



Depending on the given rights, the user can:

- Create new folders and subfolders
- Delete folder and its contents (subfolders, business cases)
- Change the properties of the folder

Folder properties:



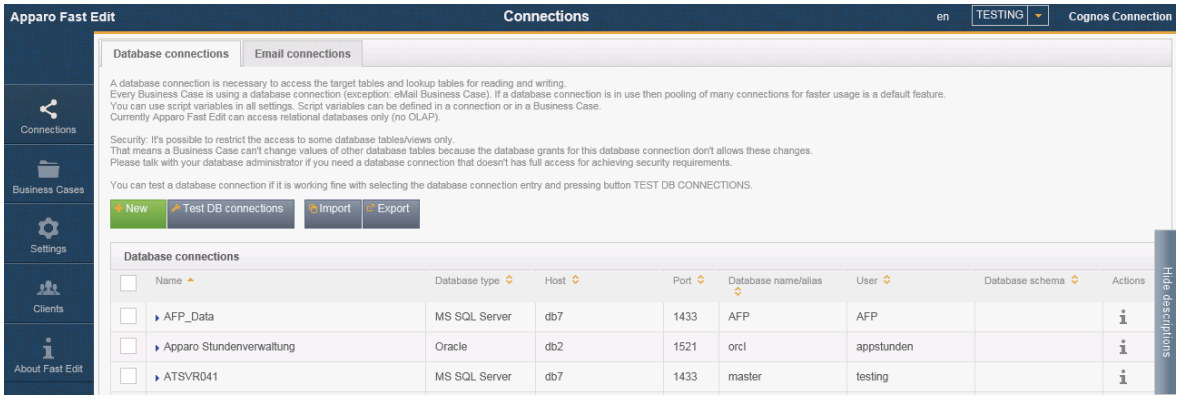
The following properties can be changed:

- Name of the folder
- The necessary security group to open the folder
- The necessary security group to edit the folder
- The necessary security group to execute containing Business Cases

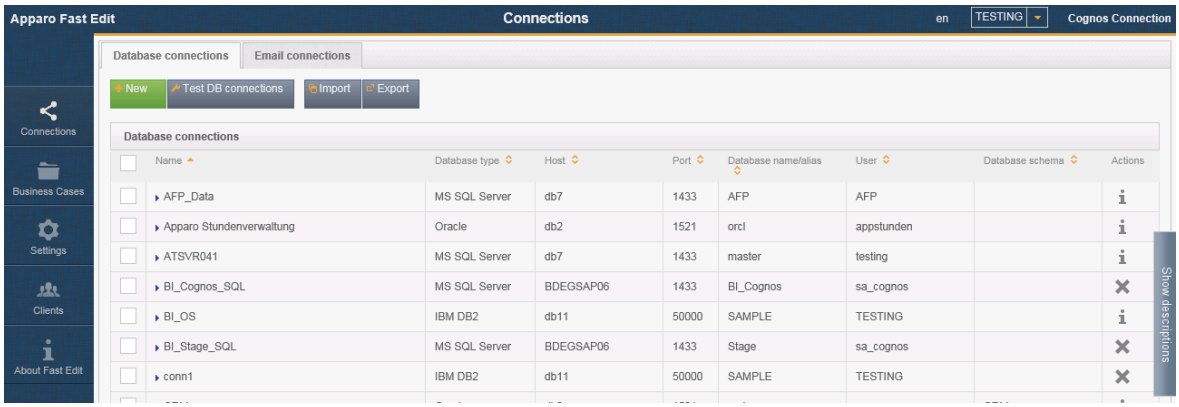
4.6 Description and normal mode

In the description mode most of the settings are explained briefly while the normal mode lacks these descriptions.

Example of the description mode:



The same page in normal mode:

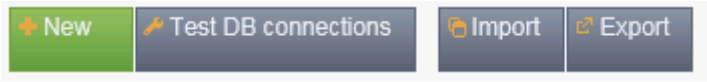


The Designer is switching the mode by clicking the

button on the right side of the screen.

4.7 Database connections

4.7.1 Buttons



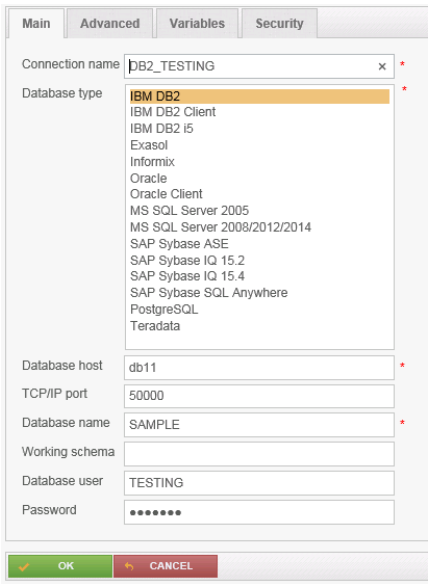
The following buttons are at your disposal:

- New - creates a new database connection
- Test DB-Connection - is testing all selected DB connections
- Import - imports DB connections from a file
- Export - exports all selected DB connections into a file

4.7.2 Creating a new database connection

Click on the button

4.7.3 Settings of the tab ‚Main‘



Depending on the selected connection, you must configure the following settings:

- Connection name - Freely selectable unique identifier for the connection
- Database type - select from list your database type
- Database host - IP address or host name of the database
- TCP/IP Port - listening port of the database
- Database name - Name of the DB
- Working schema - what schema must be used
- Database user - user name of the login
- Password - password of the login

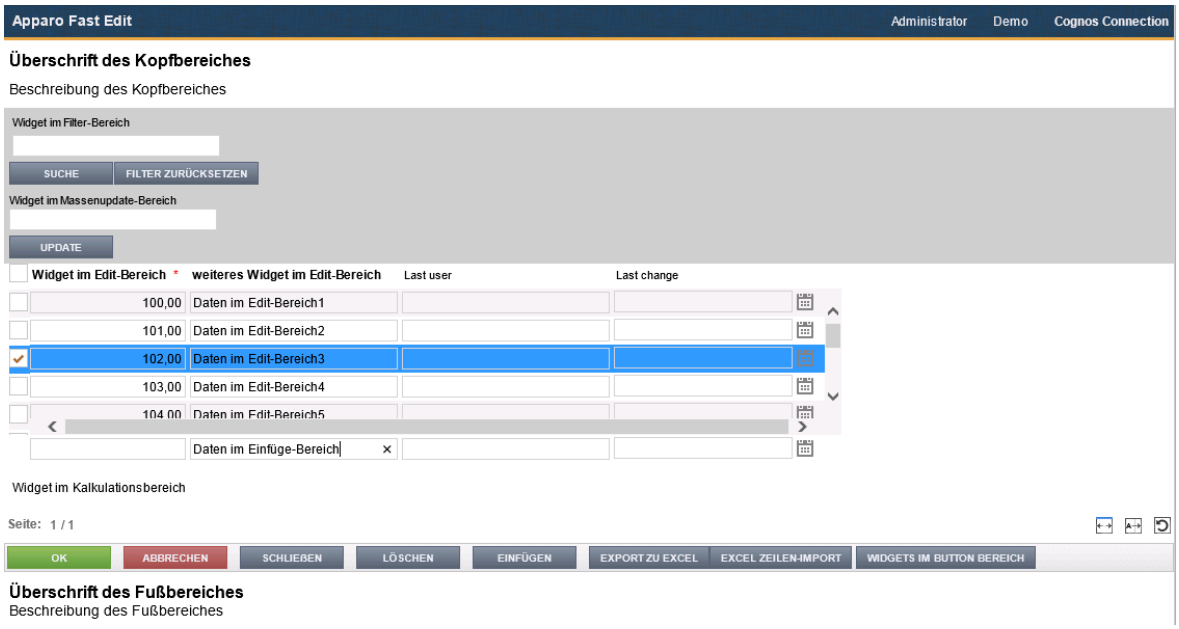
5 Creating a Table Business Case (TBC)

5.1 Introduction

In the following section, we will show the general steps to create a Business Case by using a table Business Case as example. All important points (creating, widgets, design, and output) are explained.
Remember that each Business Case refers to a specific table in a database. If you need data from several tables, you need to work with e.g. master-detail relationships or **Lookup** widgets.

5.2 Areas of a Table Business Case

A Table Business Case consists of different (partially optional) areas

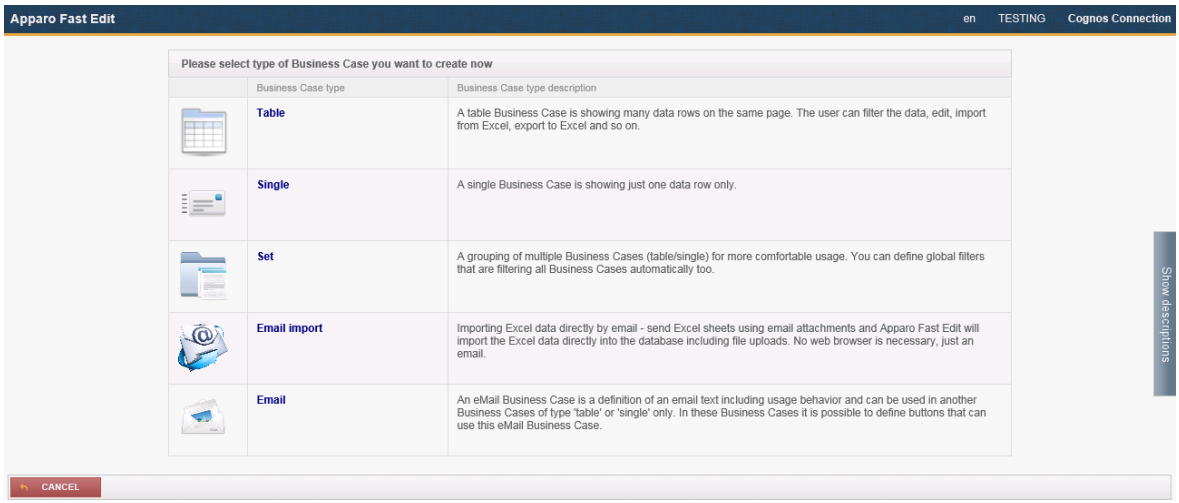


Header area	- includes the title and description
Filter area	- for example, contains filter widgets to filter the data output
Bulk update area	- mass update panel
Edit area	- to modify existing data
Insert area	- for adding new records
Calculation area	- used to display information, such as text or calculations of variables
Navigation area	- includes page counter, navigation and buttons for resizing
Button area	- contains buttons
Footer area	- comparable to the header area

5.3 Create a new Business Case

Click on the button:

Now select the entry ‚Table‘

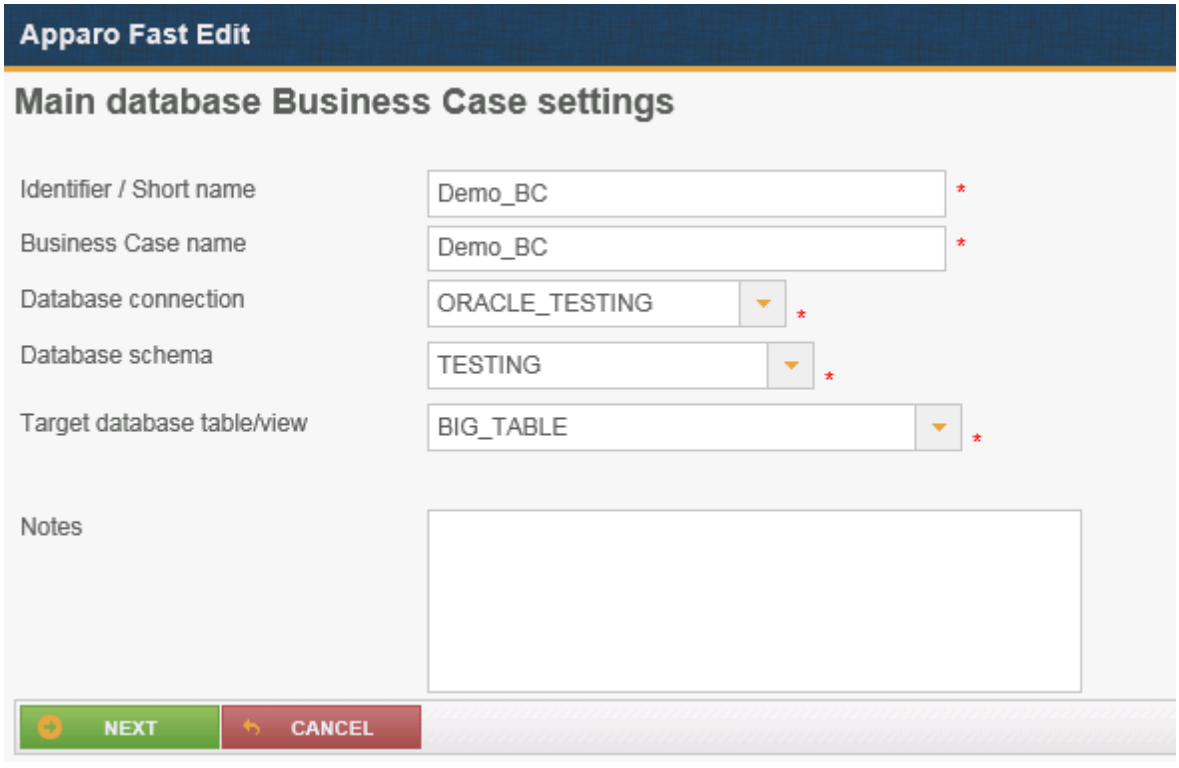


Business Case selection

Following, the general settings for the business case

Please provide a unique short name (ID), a name and select the target table.
The description is optional and can contain declarations, release notes, or other information.

If multiple database connections are set up, this selection is automatically extended by the points ‘database connection' and 'database schema'.

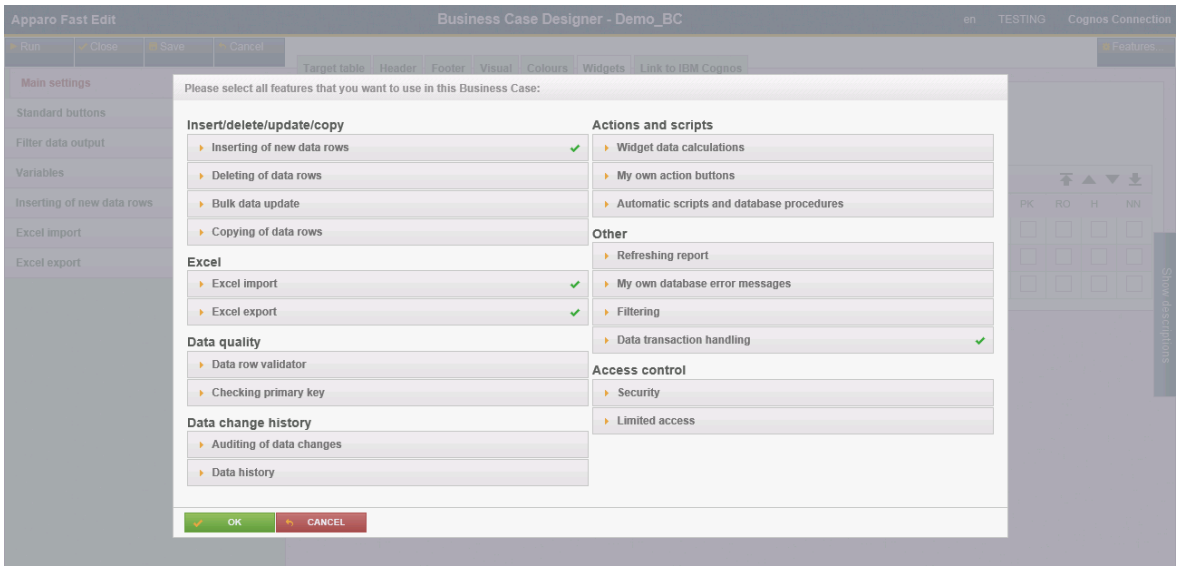


Main settings

5.4 Business Case Functions

The functions of a business case open automatically after creating a business case.

If the business case is opened later for editing again, you can open the feature selection with the button on top right corner:



The features are divided into seven sections. The various functions can be enabled or disabled as needed. If a function is activated, then the selection menu in the Business Case edit view will be extended accordingly.

The advantage of this activation is obvious, if the Business Case is opened for editing again after some time, then you can see with one look at the menu, which features are used in this business case.

5.5 Features areas and features

- **Insert/delete/update/copy**
  - Inserting of new data rows
  - Deleting of data rows
  - Bulk data update
  - Copying of data rows

- **Excel**
  - Excel Import
  - Excel Export

- **Data quality**
  - Data row validator
  - Checking primary key

- **Data change history**
  - Auditing of data changes
  - Data history

- **Actions and scripts**
  - Widget data calculations
  - My own action buttons
  - Automatic scripts and database procedures

- **Other**
  - Reloading reports
  - My own database error messages
  - Filtering
  - Data transaction handling

- **Access control**
  - Security
  - Limited access

5.6 Edit view of the Business Case

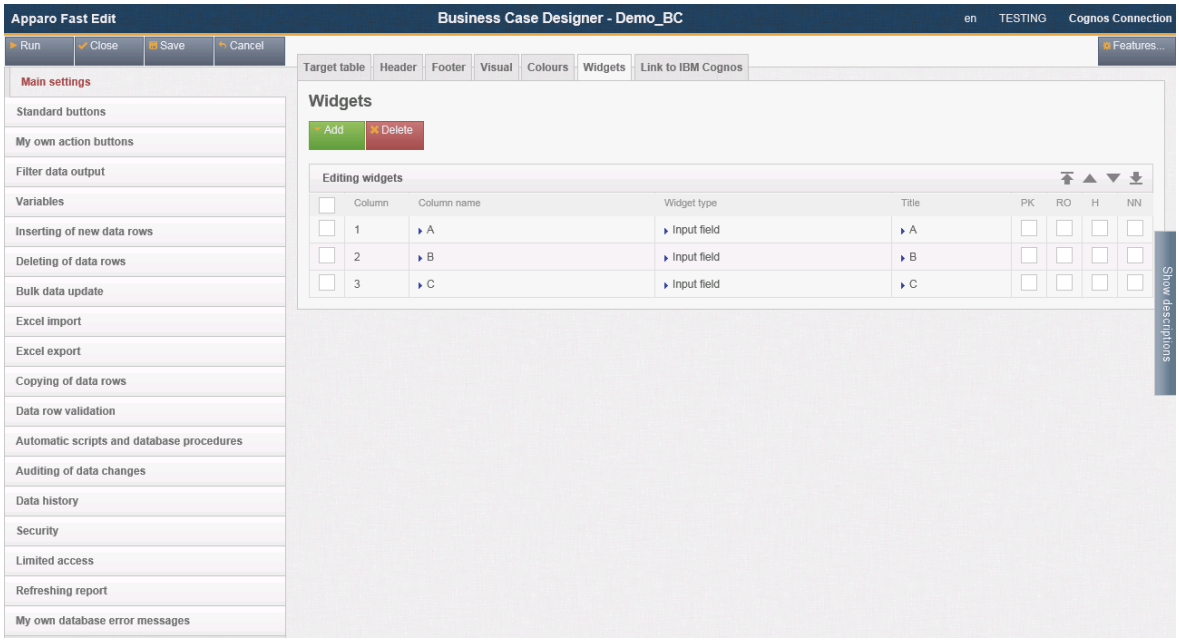
The edit screen is divided into two areas:

Menu bar, the buttons on the controller and all activated functions as menu items contains.

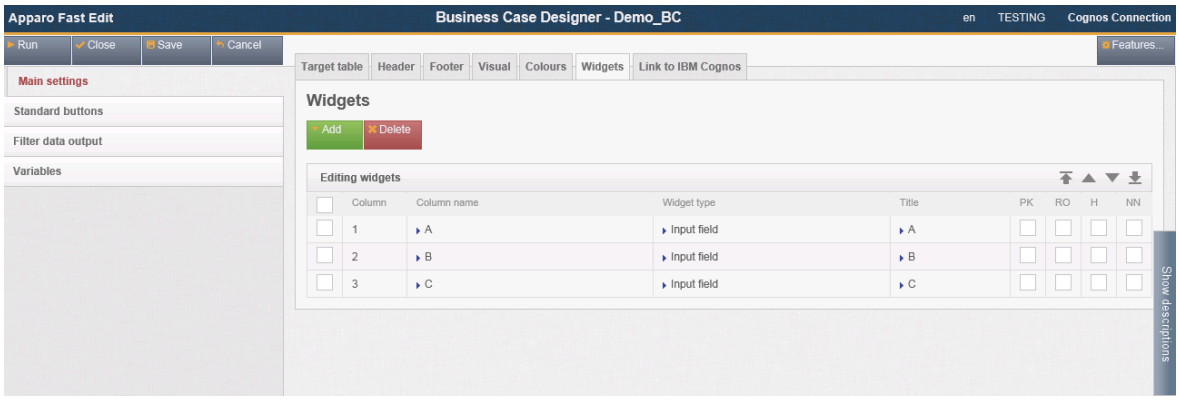
Buttons:

- **Start** - saves all changes and starts the business case
- **Close** - saves all changes and closes the edit view
- **Save** - saves all changes
- **Cancel** - discards any unsaved changes and closes the Business Case

Settings area, contains settings for the various functions and optionally divided again into tabs.



Edit view in activation of all functions



Edit view in deactivation of all functions. Only the basic functions are displayed.

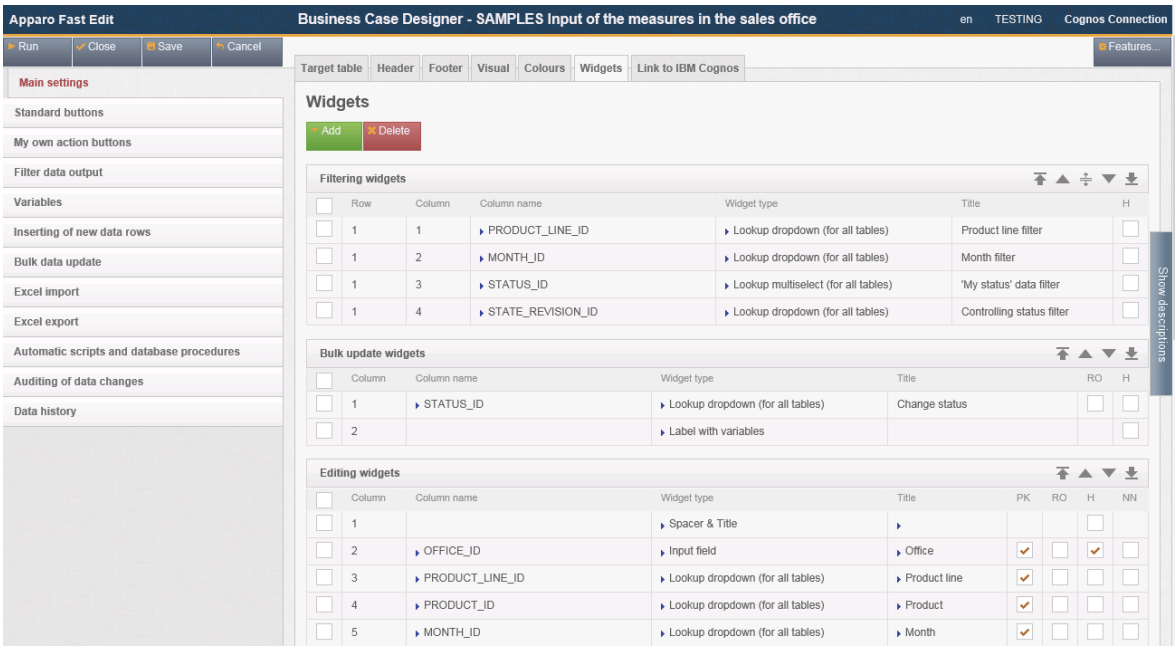
5.7 Business Case Settings

5.7.1 Main settings

The main settings are divided into several tabs and are containing the settings of the data source and the optics of the business case. Above all, it contains the widget settings.

Widgets are the actual control and output elements of a business case. This can be a filter, input or selection fields, buttons and more.

Because of their importance are Widgets the first tab you see when you open the Main settings.



Main settings, Widgets

5.8 Widgets

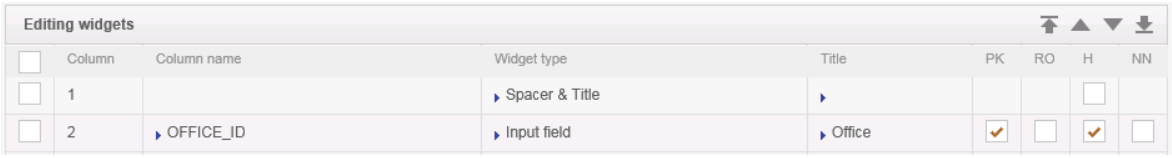
This chapter covers the central area of a Business Case.

Here you can have different widgets that are normally connected with the target table, positioned in different areas.

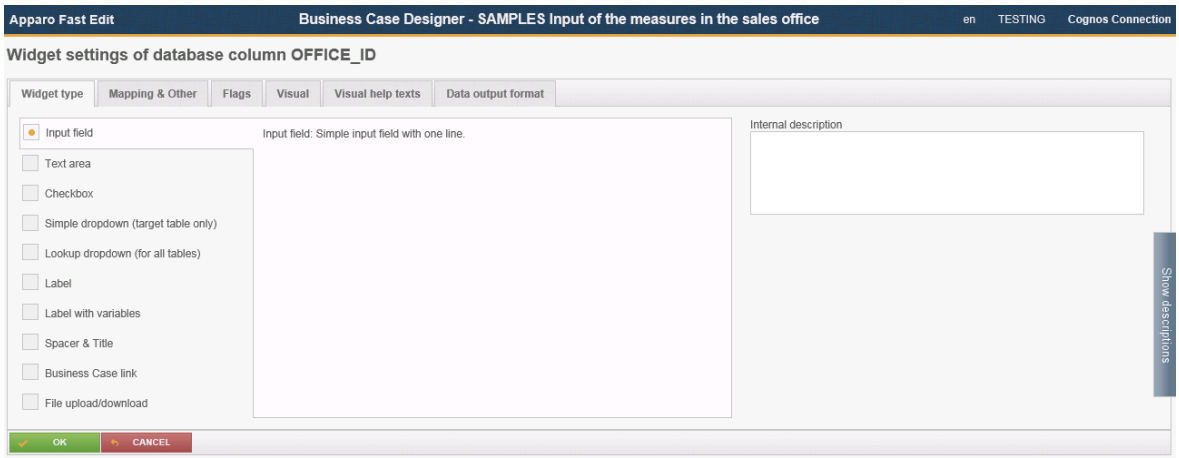
Each widget has its own individual settings.

5.8.1 Edit view

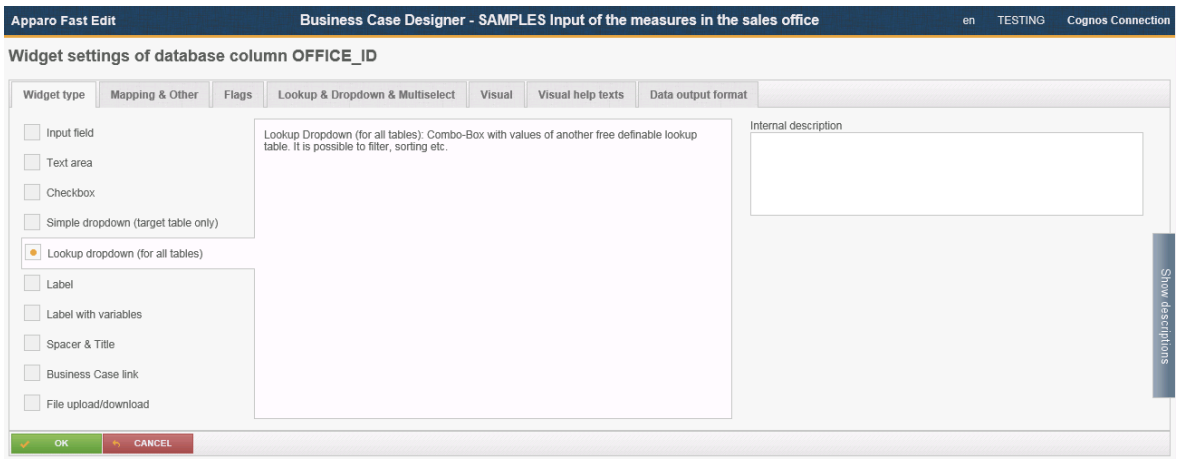
You can open the settings of an existing widget, by clicking on the column name or widget type:



Depending on the type of widget has the edit view different options, divided into tabs.



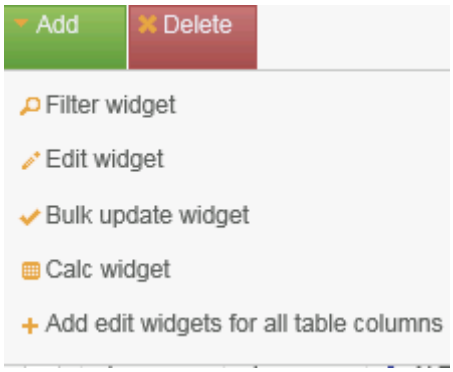
Widget edit view for the type ‚Input field'



Widget edit view for the type ‚Lookup dropdown (for all tables)'

5.9 Widget types and areas

When creating a new widget, you will first be asked for which area it is intended:



The option to add widgets for all database columns 'Add edit widgets for all table columns, is adding an 'input field' widget for each existing database column, if no widget is existing for this database column.

The corresponding areas for the widget types are:

- **Filter area**
- **Edit area**
- **Bulk update area**
- **Calculation area**

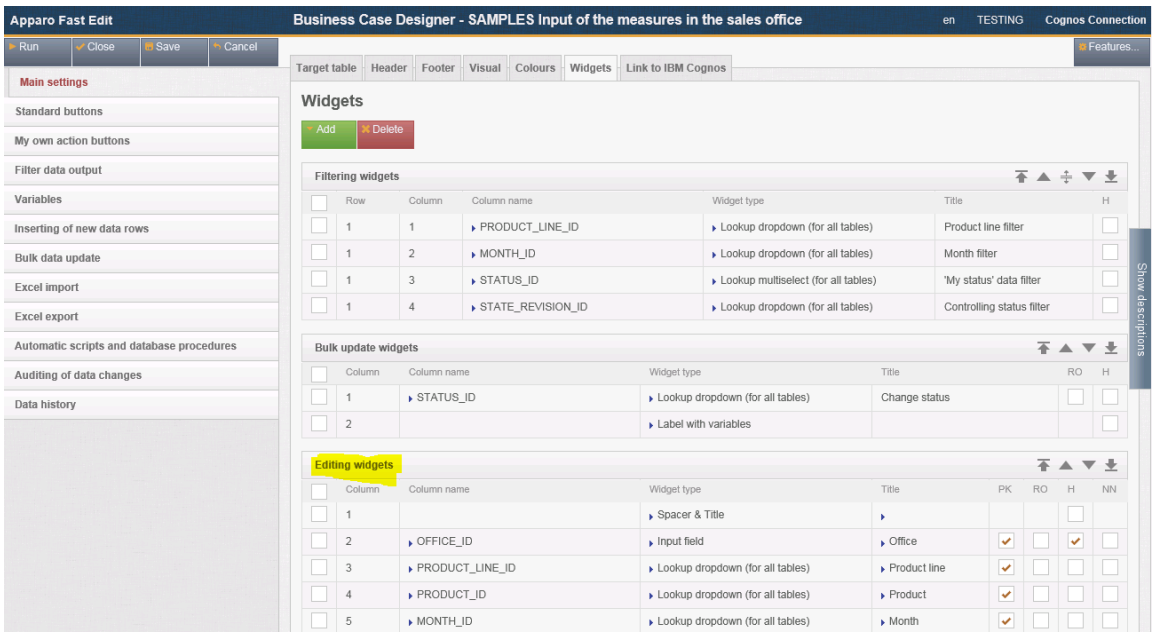
Based on the area for which the widget is thought, is there a selection of different widget types:

Input field - A standard entry field which allows the input of alphanumeric data
Text area - A multiline entry area that allows formatted text
Checkbox - Allows exactly two values, checked or not checked
Simple dropdown (for target table only) - Based on data in the target table
Lookup dropdown (for all tables) - Replaces numerical values with plain text from a 2nd table
Simple multiselect - Select multiple values
Lookup multiselect - Multiselect based on a lookup table
Label - Enables you to output text
Label with variables - Enables the output of text and values of variables
Spacer & Title - To set up void spaces between individual widgets
Business Case Link - To call e.g. detail BCs, data values are passed here
File Upload/Download - To attach files to data rows

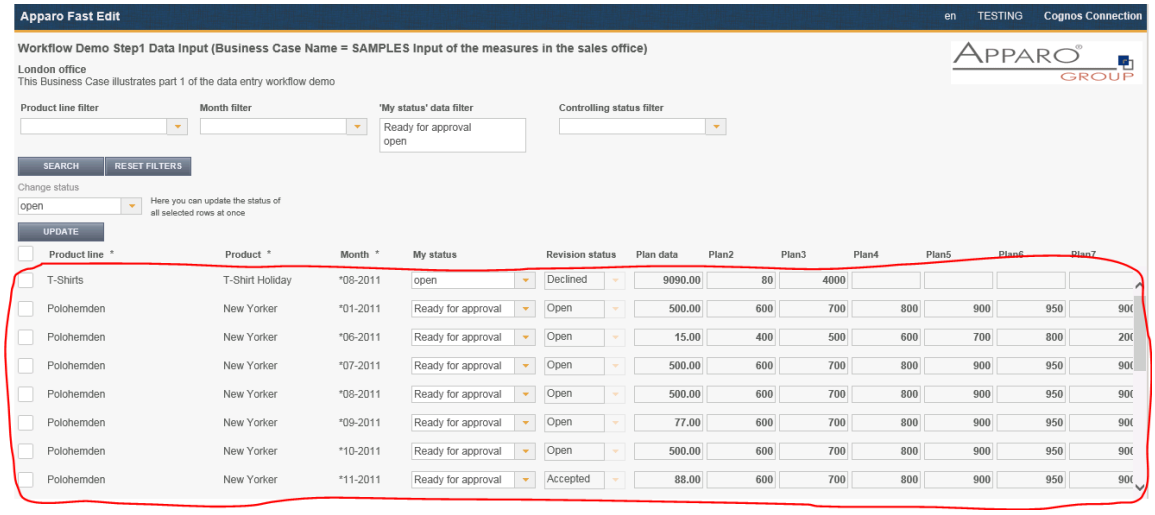
Business Case Link and File Upload/Download can only be used in the edit area.
Multiselect is only available in the filter area.

5.10 Widgets in the Edit Area

The edit area in a table business case (TBC) is mainly used for displaying data in list form and gives users the ability to edit the data.



Widgets of an area are grouped
Example for edit widgets in the user view:



In the edit area you can choose between these types of widgets:

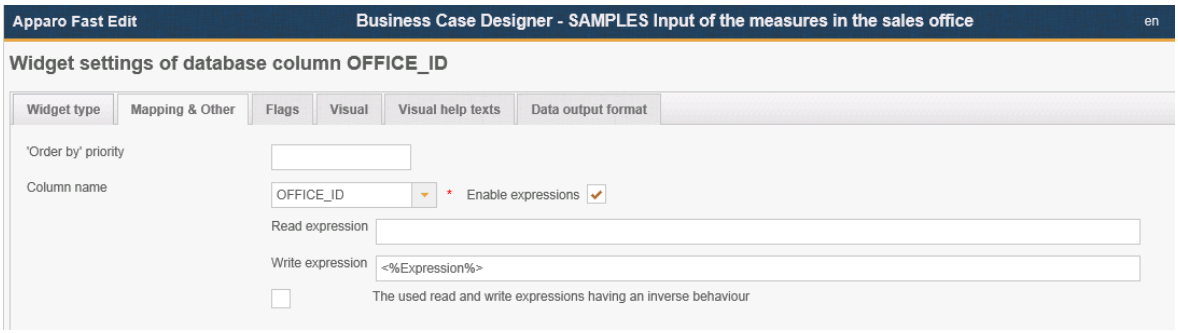
- **Input fiel**d - A standard entry field which allows the input of alphanumeric data
- **Text area** - A multiline entry area that allows formatted text
- **Checkbox** - Allows exactly two values, checked or not checked
- **Simple dropdown** (for target table only) - Based on data in the target table
- **Lookup dropdown** (for all tables) - Replaces numerical values with plain text from a 2nd table
- **Label** - Enables you to output text
- **Label with variables** - Enables the output of text and values of variables
- **Spacer & Title** - To set up void spaces between individual widgets
- **Business Case Link** - To call e.g. detail BCs, data values are passed here
- **File Upload/Download** - To attach files to data rows

5.11 Special functions in the widget settings

There are some special functions in the widget settings:

5.12 Reading and Writing Expressions

Reading and writing expressions allow the usage of SQL to manipulate data before it is shown to users or stored to the database.



Variables are allowed here

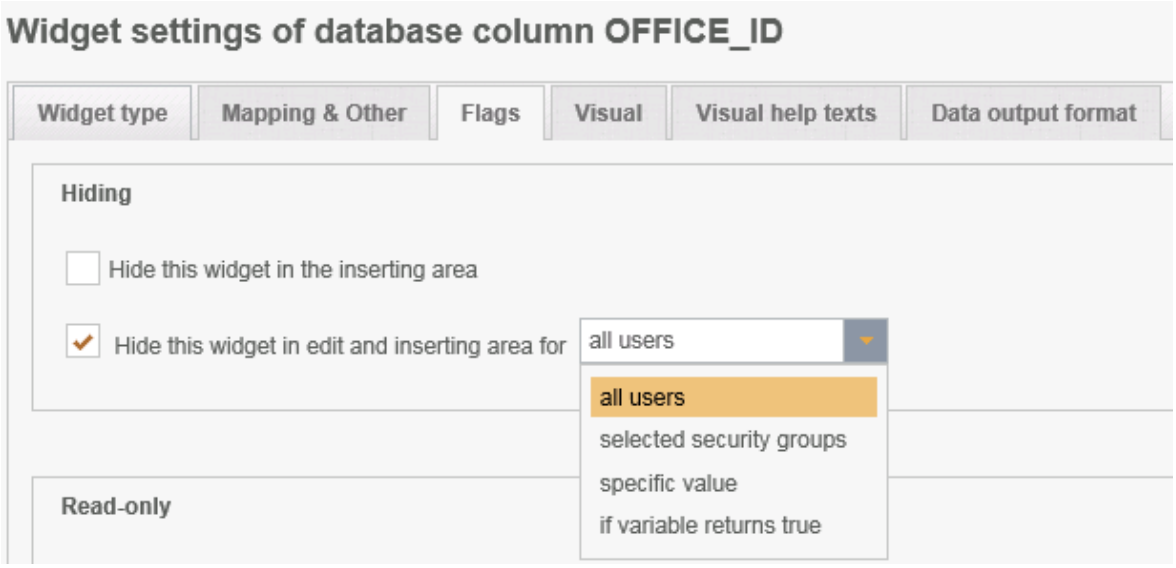
Common examples for expressions are:

TRIM() - Removes spaces from strings
UPPER() - Turns all letters into upper cases
LOWER() - Turns all letters into lower cases

5.13 Conditional options

Many functions can be controlled with reference to conditions.

Thus, there are e.g. for the function ‚Hidden', which hides a widget for the user when activated, several options.

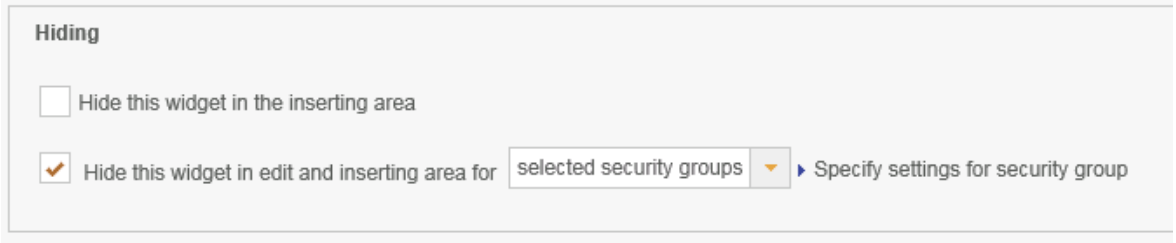


For all users

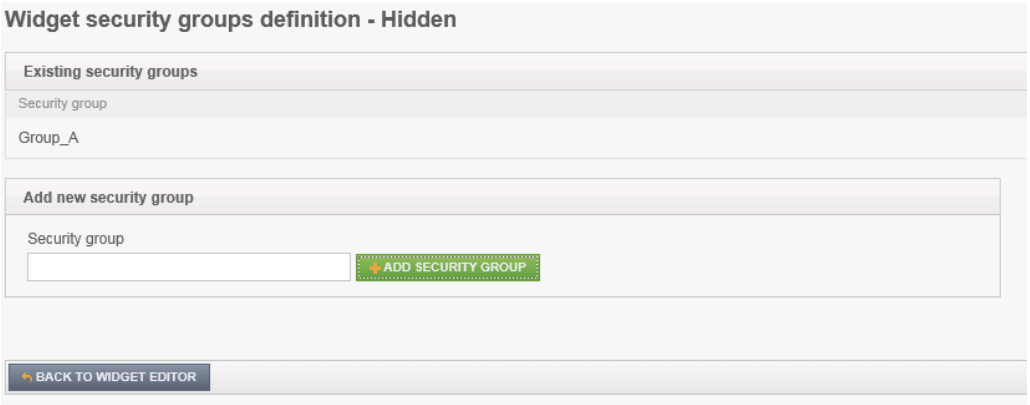
This option is set by default. It hides the widget for all users.

For selected security groups

This hides the widget, but only for users who are member of one of the entered user groups. Other users can see the widget.



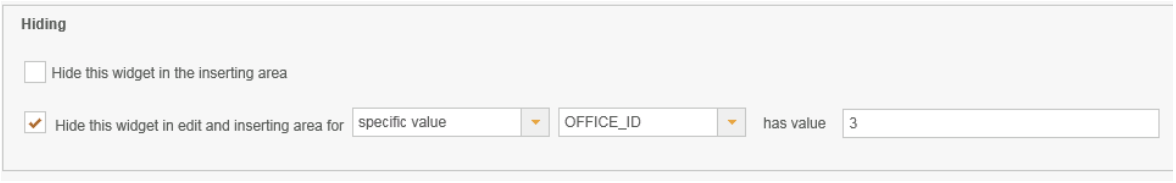
Hide the widget for the selected user groups



Security group editor

For a specific value

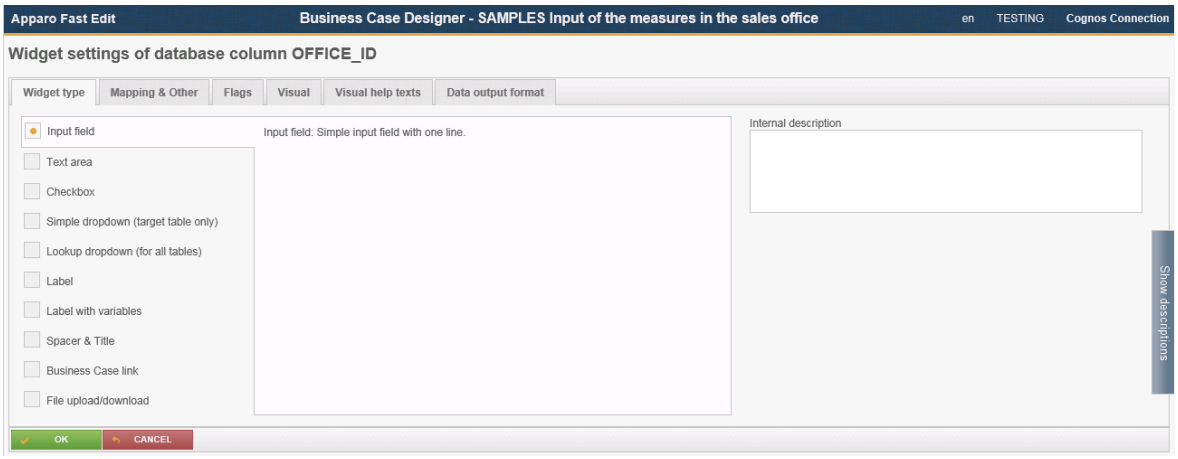
The option applies here as soon as the value of one of the columns in the target table in the corresponding data row matches with the stored value.
In our example, the widget would be hidden once in a data row in the office ID column the value '3' appears.



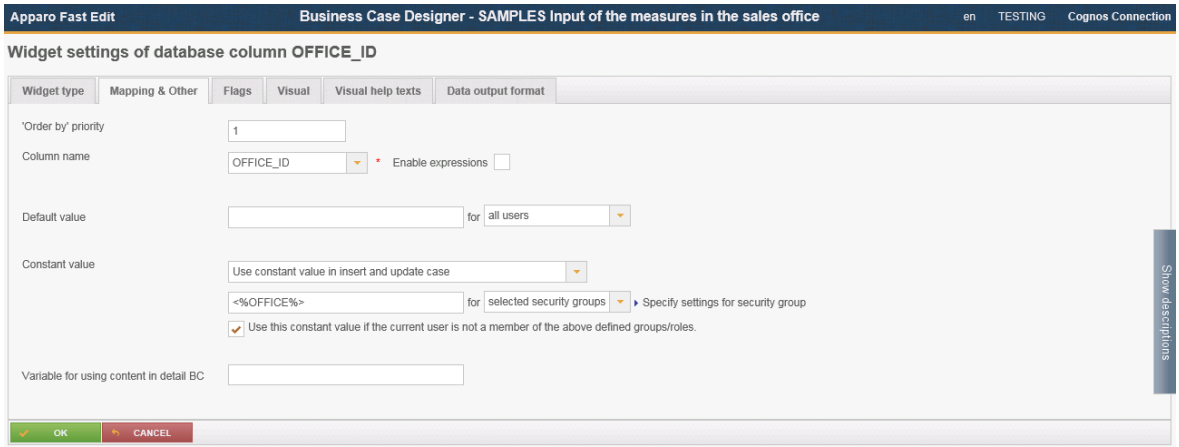
The values can also be configured dynamically by using variables. <%VARIABLE%>

5.14 Widget settings for the example ‚Input field'

Each widget type has its own settings. The following settings using the example of the widget type ‚input field' can be found in almost all widget types. Distinctive features of each widget type are described in the following chapter ‚More widget settings'



5.14.1 Mapping & Other



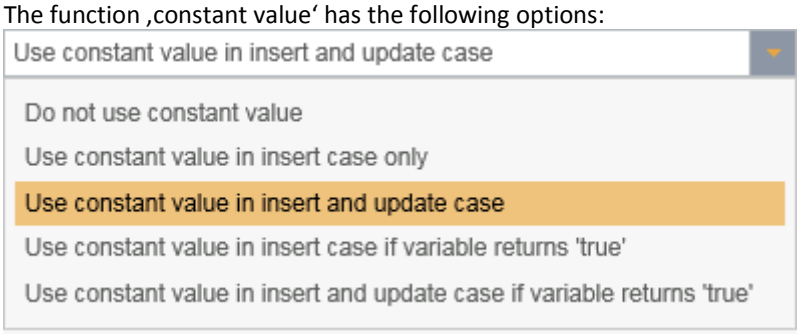
‚Order by' priority
Sorting the editing rows using this sort order (1,2,3,...: sorting ascending, -1,-2,-3,...: sorting descending etc.).
The number is defining the position of this widget in the order, for example -2: means ascending order, widget ist on 2. position of the order list
You cannot use same value for more than one widget e.g. -1,1 or 1,1

Column name
Here you can select the database column that is connected to this widget. The widget is reading the content of the column and is writing to this column. It is possible to use a variable in this column name too.

Default value
If you define a default value (using a variable is possible too) then the user will see this value in this input field in the inserting area. It is possible to define different default values for different user roles/groups. Use English format to define numeric or date values. Default value of lookup widget must be the lookup key value.

Constant value
A constant value is a value that will be always used for this widget. Even if the widget is hidden, read-only or if the user is inserting a value, then the constant value will be used. It is possible to define different constant values for different user roles/groups.

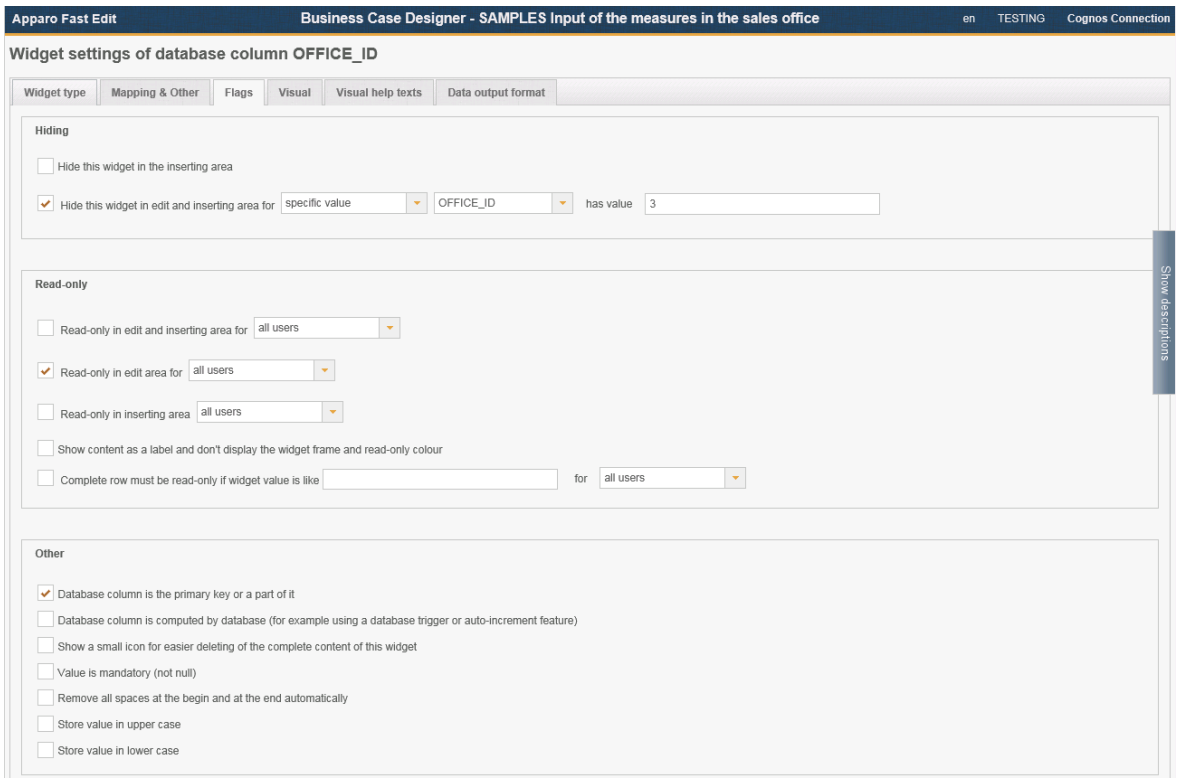
The function ‚constant value' has the following options:



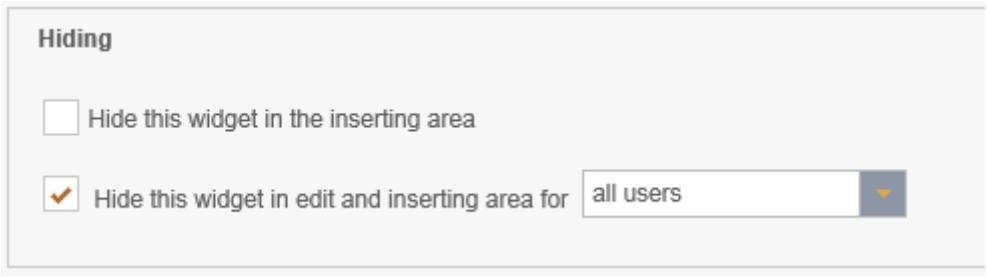
Variable for using content in detail BC
If this Business Case has a widget of type 'Business Case Link' for opening a detail Business Case, it is possible to define a variable that contains the value of the current widget.
The detail Business Case can use this report variable with the current value of this widget for example for output.
Important: In the detail Business Case you must define this report variable in tab "Variables" too.

5.14.2 Flags

In the tab Flags you can control the behavior of the widget in detail.



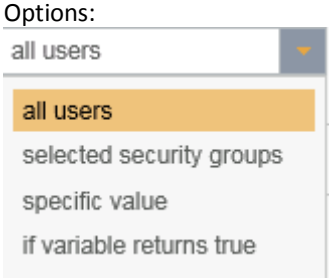
Hiding-Group
Includes options for hiding widgets.



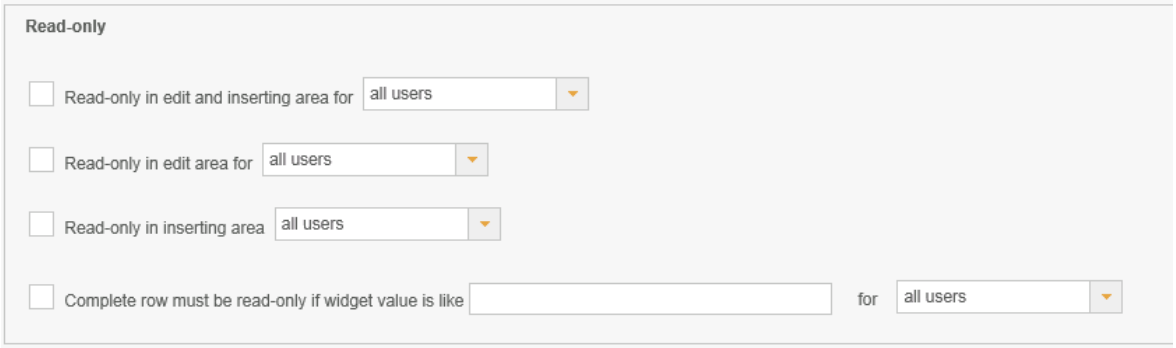
Hide this widget in the inserting area
If enabled, the user will not see this widget in the inserting area. If you use a constant value then it will be used no matter if the widget is hidden or not.

Hide this widget in edit and inserting area for
The data field is to be used, but not shown in insert and editing area, optional security group based. That means this widget can be hidden for certain user groups only.

Options:

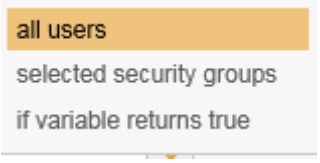


Read only group
Includes options to disable the entering or changing of values in widgets



Read-only in edit and inserting area for
The data field cannot be altered in editing and inserting area but it is still visible with another background color, optional security group based.

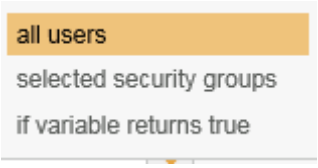
Options:



Read-only in edit area for

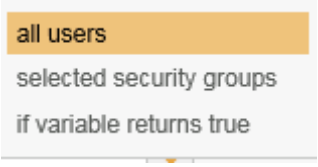
The data field cannot be altered in editing area, optional security group based. Read-only widgets have an own background color.

Options:



Read-only in inserting area
The data field cannot be altered in inserting area, optional security group based. Read-only widgets have an own background colour.

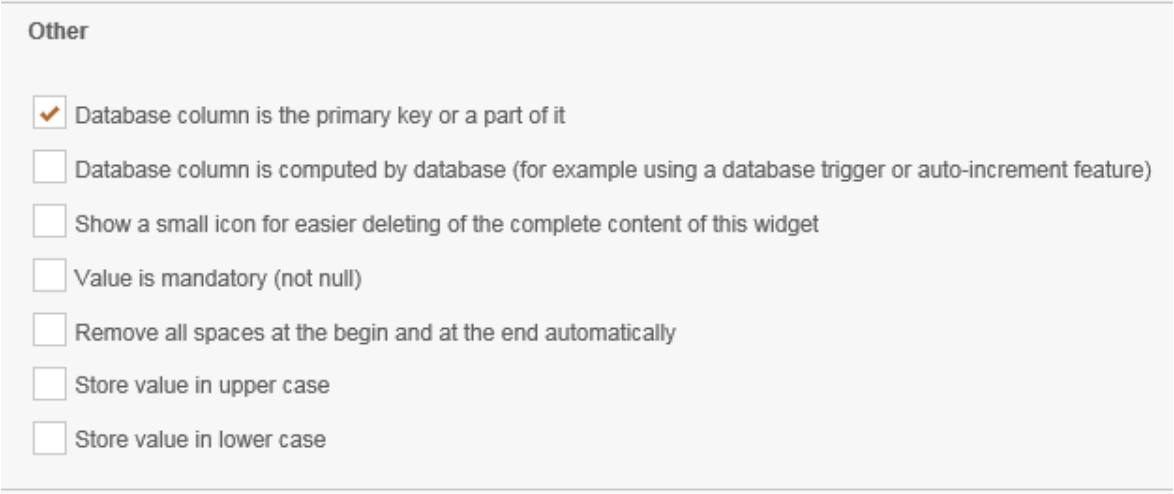
Options:



Complete row must be read-only if widget value is like
If the current widget has this value then the complete row is read-only. Use English format to define numeric or date values.
This feature is helpful if you work with different record states like 'open', 'closed' and when just certain records must be updateable. You can use a variable in this field too.

Other-Group

Contains all other settings



Database column is the primary key or a part of it
The widget is the primary key of the underlying table or is an part of the key (with combined keys). This definition is independent of the primary key definition in the database and at least one column must be defined as primary key. A primary key is identifying an unique data row of the target table/view.

Database column is computed by database (for example using a database trigger or auto-increment feature)
The database table column value is filled automatically by the database (e.g. with triggers, auto-increment field). Apparo Fast Edit is not changing this value in the target table.

Show a small icon for easier deleting of the complete content of this widget
Showing a small delete icon for deleting the widget content.

Value is mandatory (not null)
If a widget value is mandatory then the user must input a value into this widget (or using default or constant value). The definition of this behavior is independent from the definition of the target table column in the database.
If a filtering widget is mandatory it is a good idea to define a default value for him too. You will avoid some error messages at the Business Case startup.

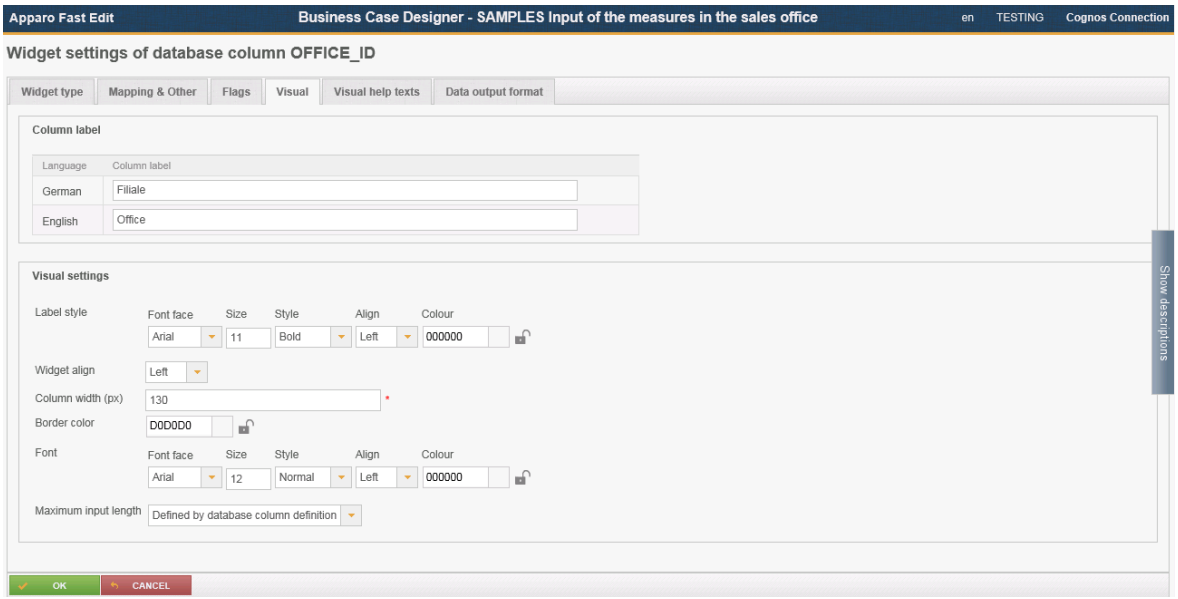
Remove all spaces at the begin and at the end automatically
If enabled then all spaces at the begin and end are removed automatically before storing into database table

Store value in upper case
If enabled then all characters are changed to upper case before storing into database table

Store value in lower case
If enabled then all characters are changed to lower case before storing into database table

5.14.3 Visual

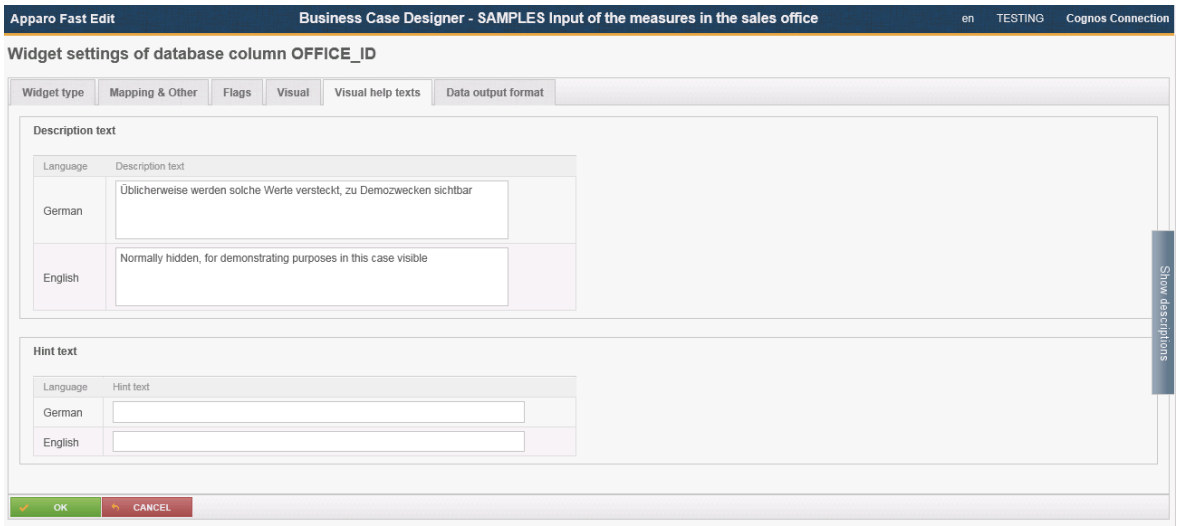
In the tab ‚Visual' you will find the header (column heading), and settings for the layout, and settings to limit the maximum allowed input length in this widget.
By default the maximum entry length is defined by the database column definition, for example Varchar(20) allows a maximum of 20 alphanumeric characters. This can be further limited by the input of an own value
.



The layout can also be controlled by CSS.

5.14.4 Visual help texts

Contains the settings for description and hint text



Description text

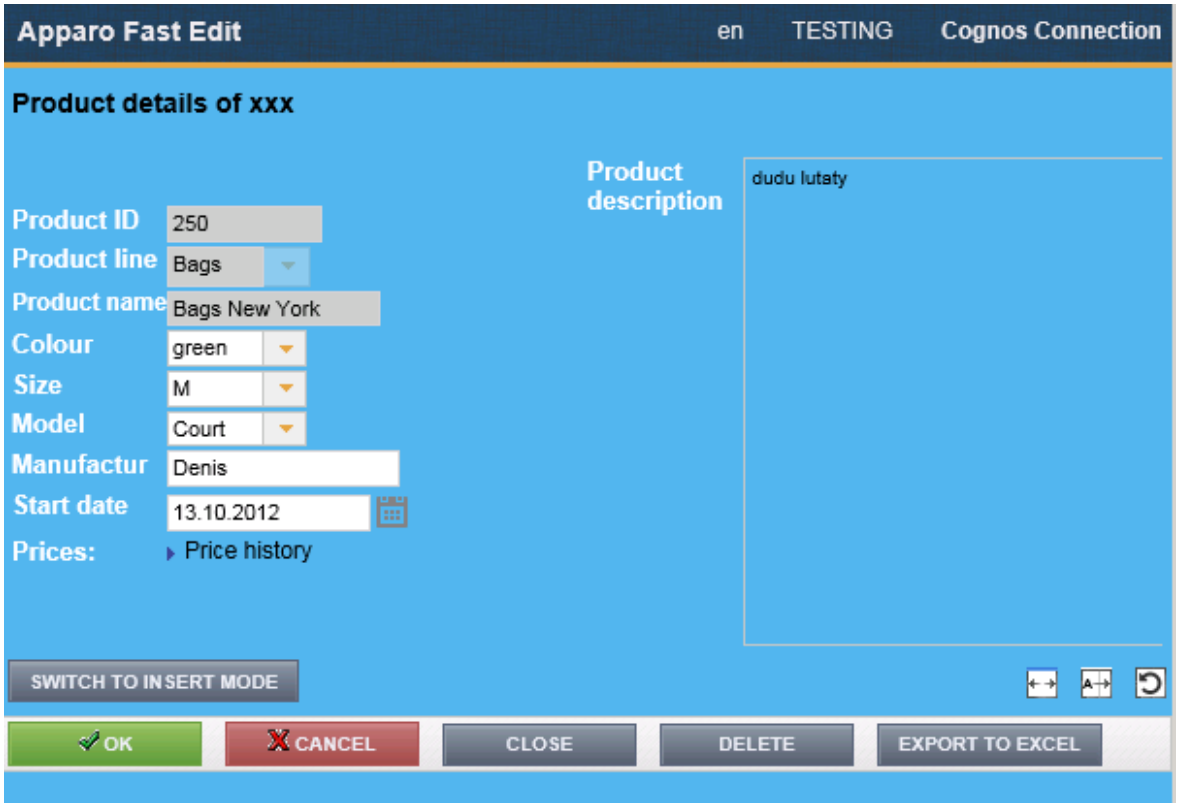
This text can describe the widget and can be helpful for the user. You can add a more detail description text for each installed language.
The user is seeing this text if he is pointing to the label of this widget.

Hint text

The hint text is displayed only if the widget has no value.
Is displayed in the input area in gray text, e.g. ‘Enter date in the format: dd.MM.yy’

6 Single Business Cases (SBC)

A single business case (SBC) is used to represent a single data set (database row). A typical application is a data entry screen or a detailed view.
The functions and settings of the SBC are substantially identical to those of Table business cases.
This chapter focuses on the features and the settings that apply only to the single business case.



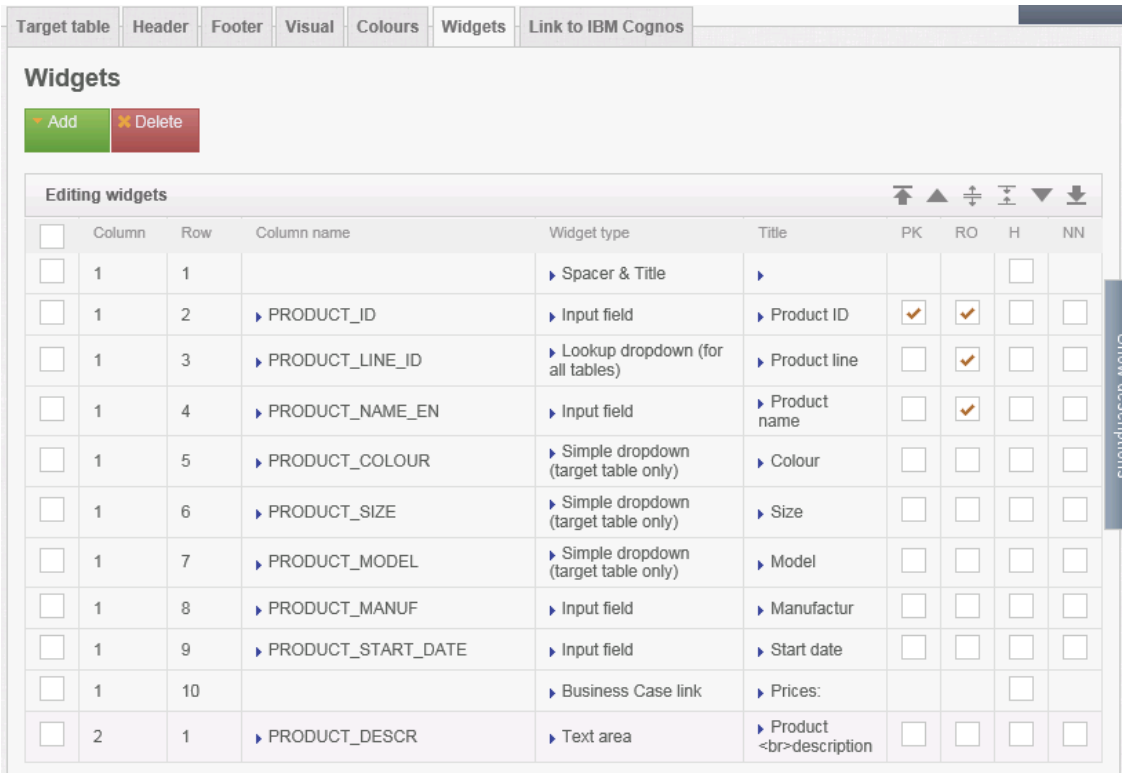
User view of a SBC, the widgets are visually divided into 2 columns.

6.1 Structure of the SBC

- **Header area** - with the title and description
- **Data area** - where the widgets are arranged in columns
- **Navigation pane** - used to navigate between records and the switch button for the data input mode
- **Button area** - contains the default and user-defined buttons
- Optional **footer area** - for info and graphics

6.2 Arrangement of the widgets in the SBC

The widgets in the SBC can be output with multiple columns, the order is determined by the line.



	Column	Row	Column name	Widget type	Title	PK	RO	H	NN
	1	1		Spacer & Title					
	1	2	PRODUCT_ID	Input field	Product ID	✓	✓		
	1	3	PRODUCT_LINE_ID	Lookup dropdown (for all tables)	Product line		✓		
	1	4	PRODUCT_NAME_EN	Input field	Product name		✓		
	1	5	PRODUCT_COLOUR	Simple dropdown (target table only)	Colour				
	1	6	PRODUCT_SIZE	Simple dropdown (target table only)	Size				
	1	7	PRODUCT_MODEL	Simple dropdown (target table only)	Model				
	1	8	PRODUCT_MANUF	Input field	Manufactur				
	1	9	PRODUCT_START_DATE	Input field	Start date				
	1	10		Business Case link	Prices:				
	2	1	PRODUCT_DESCR	Text area	Product description				

Designer view: The arrangement of the widget by columns and rows

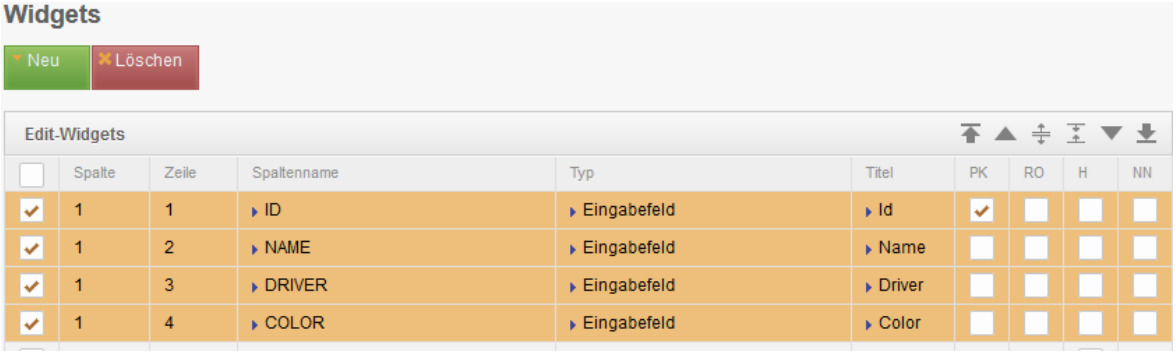
In the tab widgets you can assign the widgets to the columns.
There are, in comparison to the table business case, two new controls:

Move widget(s) to another column , creates a new column.

Merge all widgets , dissolves all columns.

Move widget(s) to another column

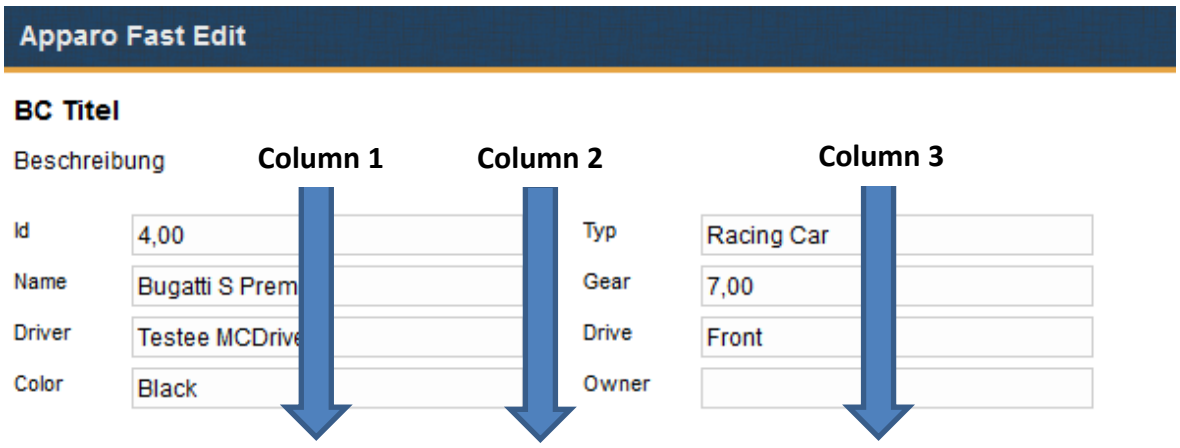
With this switching element are all the selected widgets assigned to a new column



	Spalte	Zeile	Spaltenname	Typ	Titel	PK	RO	H	NN
✓	1	1	ID	Eingabefeld	Id	✓			
✓	1	2	NAME	Eingabefeld	Name				
✓	1	3	DRIVER	Eingabefeld	Driver				
✓	1	4	COLOR	Eingabefeld	Color				

With the arrow buttons and you can move widgets within and between columns

6.2.1 Columns - a users view



User view: Column 2 contains only a placeholder and was inserted to create a gap between the other columns.

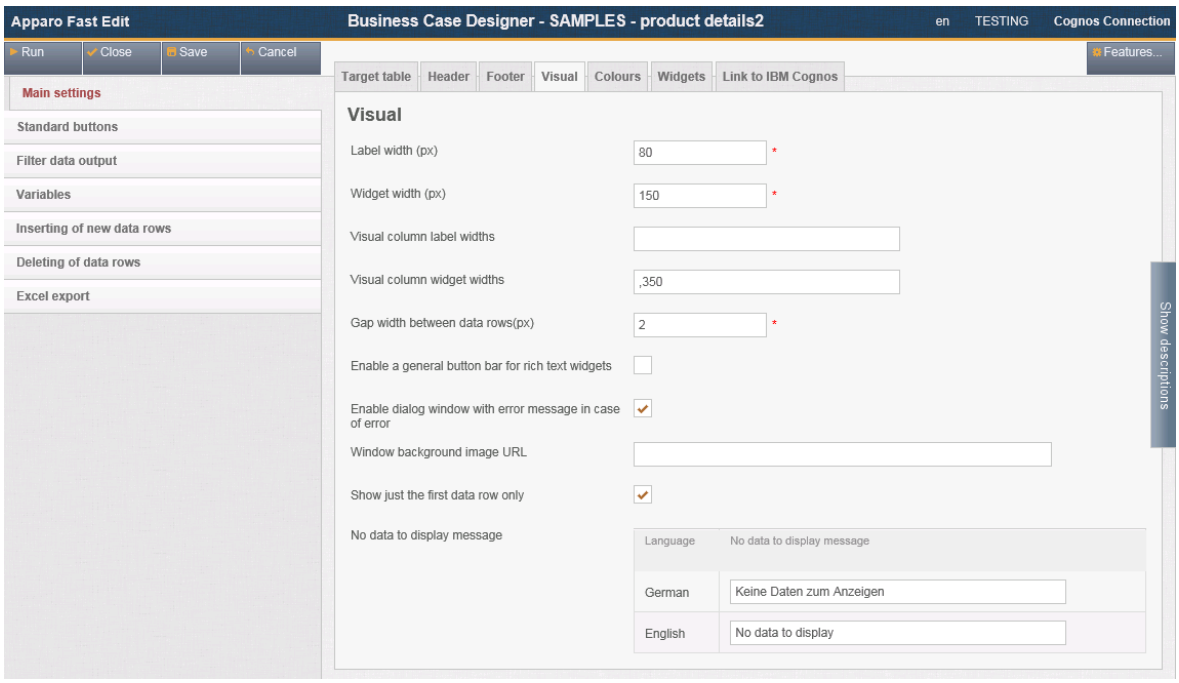
The widths of the three columns are defined in tab ‚Visual' , column 2 is 30 pixels wide.

The width of the label (widget identifier) is also defined there, column 2 requires only 1 px (minimum width) as placeholder in our example, is no label required.

The terms ‘column’ and ‘line’ refer only to the visual presentation and may not be consistent with database columns or rows.

6.3 Visual

Here you define the general optical settings for the single business case.
These settings are different from those in Table Business Case



Options

Label width (px)

Width of the label in pixels

Widget width (px) *

Width of the input area of the widget

Visual column label widths

Defines the visual column label widths. If no value is defined for visual column label width then 'Label Width' property is used as default value; e.g.

100,150,200	3 visual columns with label widths 100 (px), 150 (px) and 200 (px)
100,,200	3 visual columns with label widths 100 (px), 'Label Width' (px) and 200 (px)
,,200	3 visual columns with label widths 'Label Width' (px), 'Label Width' (px) and 200 (px)

IMPORTANT: Negative numbers are not valid.

Visual column widget widths

Defines the visual column widget widths. If no value is defined for visual column widget width then 'Widget Width' property is used as default value; e.g.

100,150,200	3 visual columns with widget widths 100 (px), 150 (px) and 200 (px)
100,,200	3 visual columns with widget widths 100 (px), 'Widget Width' (px) and 200 (px)
,,200	3 visual columns with widget widths 'Widget Width' (px), 'Widget Width' (px) and 200 (px)

IMPORTANT: Negative numbers are not valid

Gap width between data rows(px)

The optical gap between data rows in pixels, default is 2

Enable a general button bar for rich text widgets

If this feature is enabled then the user is seeing only one button bar with bold, italic, underline etc. buttons for changing the text style in rich text widgets.
This button bar is necessary if widgets of type text area with rich text functionality are used (using bold, italic, underline, different colours). The general button bar is visible like in Microsoft Word.
If disabled then each text area with rich text feature has an own button bar.

Enable dialog window with error message in case of error

If this setting is enabled than a pop-up dialog window will be displayed after each error.

Window background image URL

It is possible to use own background picture using an URL.

Show just the first data row only

When enabled only first data row will be displayed; otherwise additional buttons "<<" and ">>" will be displayed to show previous respectively next data row.

No data to display message

Message presented to user when there are no data to display

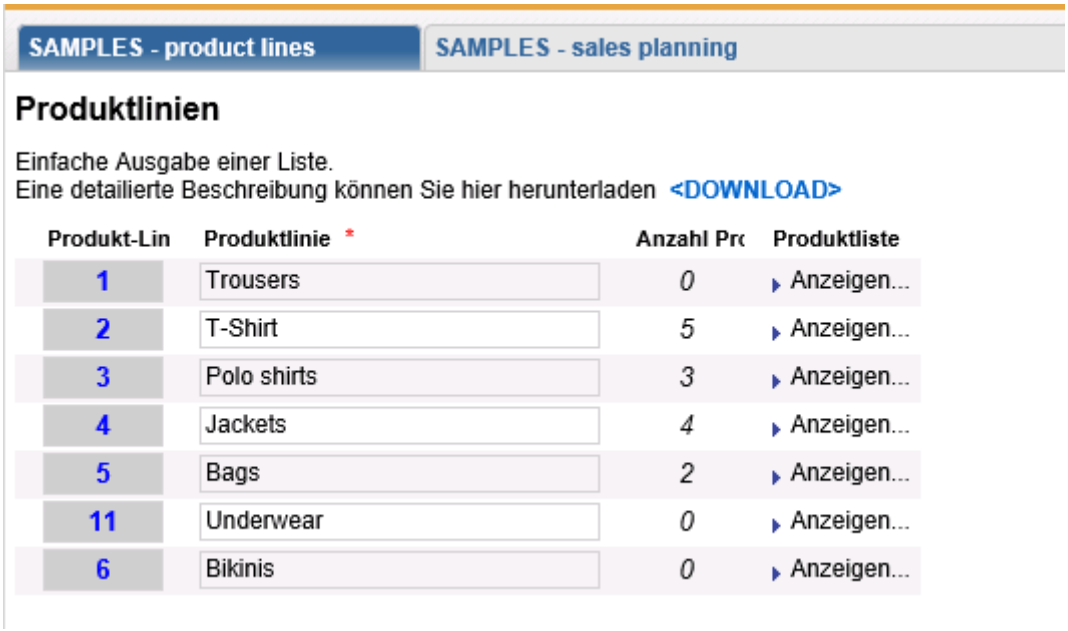
7 Combining Business Case

There are two main ways to combine Business Cases.

- As Business Case Set
- As master-detail relationship

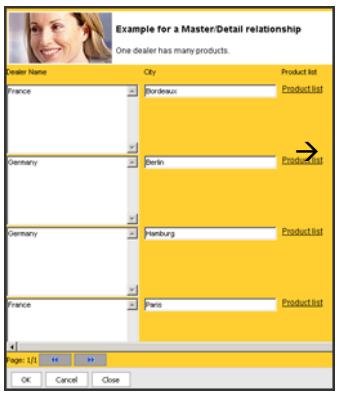
7.1 Business Case Set

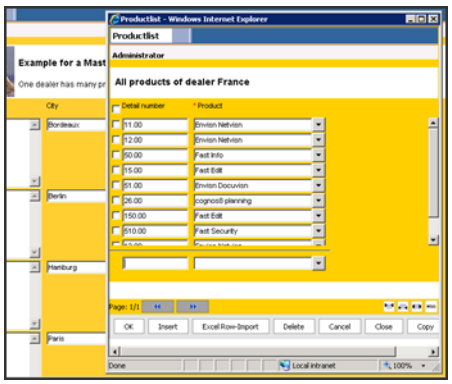
Table and Single Business Cases can be combined in a **Business Case Set**. Single or Table Cases are displayed together so that navigating is made easier. The Business Cases are not inherently connected.



7.2 Master-detail relationship

Business Cases can also be combined in a **master-detail relationship**. In this case, the contents of two tables are handled together. The database transactions are performed on both tables at the same time.



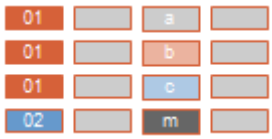


Both combinations are explained more detailed later in this tutorial.

7.3 Primary Keys

- A primary key identifies a unique row in a table.
  A typical example is a unique product ID:

- It can either be a single primary key (one attribute) or a compound key consisting of several primary keys (more than one attribute).
  An example for a compound key would be a supplier-product relationship. Each supplier offers one or more products, so the supplier ID alone is not enough to identify the row:



- When creating a Business Case, the number of primary keys has to be set to the minimum necessary to identify every unique row.

- The primary keys in a Fast Edit Business Case do not depend on the underlying database table design.
  However, the primary keys of the table are usually also used for the Business Cases.

Each column (also many columns at the same time) can be used as the primary key(s).
In Fast Edit you can define a completely different primary key than in the underlying table (the same applies to any null/not null-definitions). In the Insert and Update cases, only the primary key definition from Fast Edit will be taken into consideration.
However, in about 90% of the Business Cases, the same primary keys as in the underlying table are used.

The primary key of the database table column is important for:

- The definition of a lookup table for the **Lookup Multi-select** widget (field “Lookup table key column“).
- The widget **Business Case Link**, with which the two tables of the two Business Cases can be edited in one database transaction.

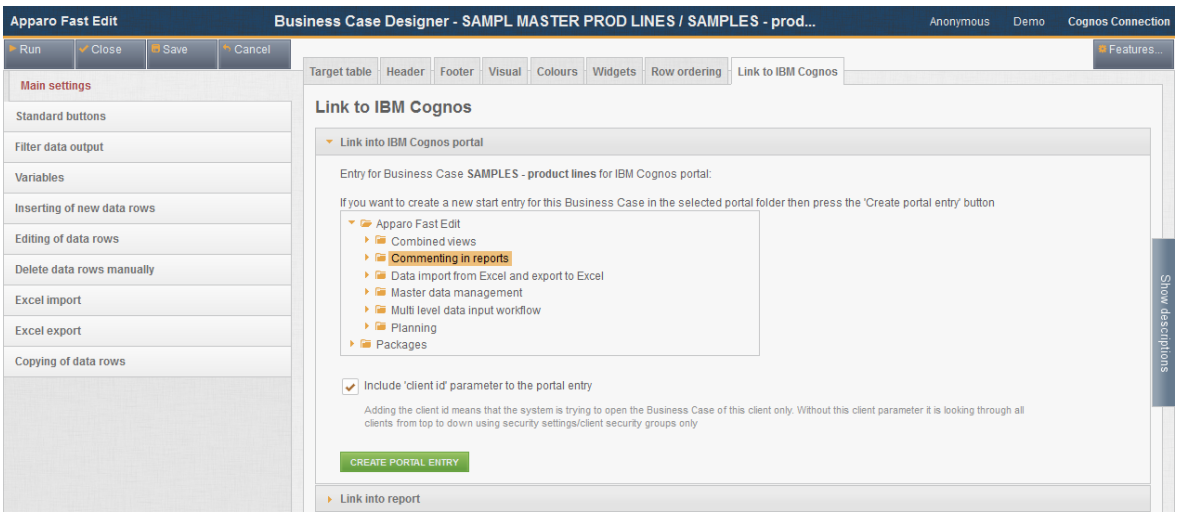
8 Create a portal entry for a Business Case

To make a Business Case accessible for business users, we need to create a link in the portal.

First, open the business case:

Select the "Link to IBM Cognos" tab.

Select the Portal folder in which the Business Case should appear:



You need to click directly on the folder name to select the folder.

Then press the "Create portal entry" button to create a Business Case entry in this folder.

Business users start the Business Cases usually exclusively through the portal entry.

9 Creating database table and columns with the Designer

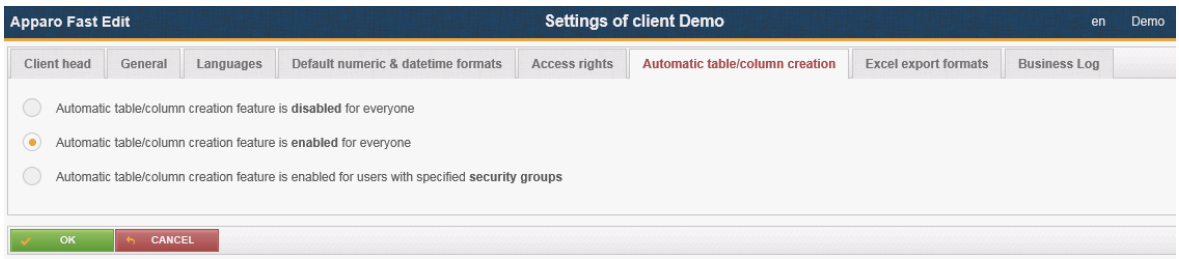
You can allow your users Designer to create new database tables with the designer or to add columns to existing tables.

This function allows only simple database tables and the following basic data types:

- Number
- Text
- Date

9.1 Activation of the feature in the client settings

This feature is disabled by default and must be enabled in the client.
Optionally, you can restrict this function to certain security groups.



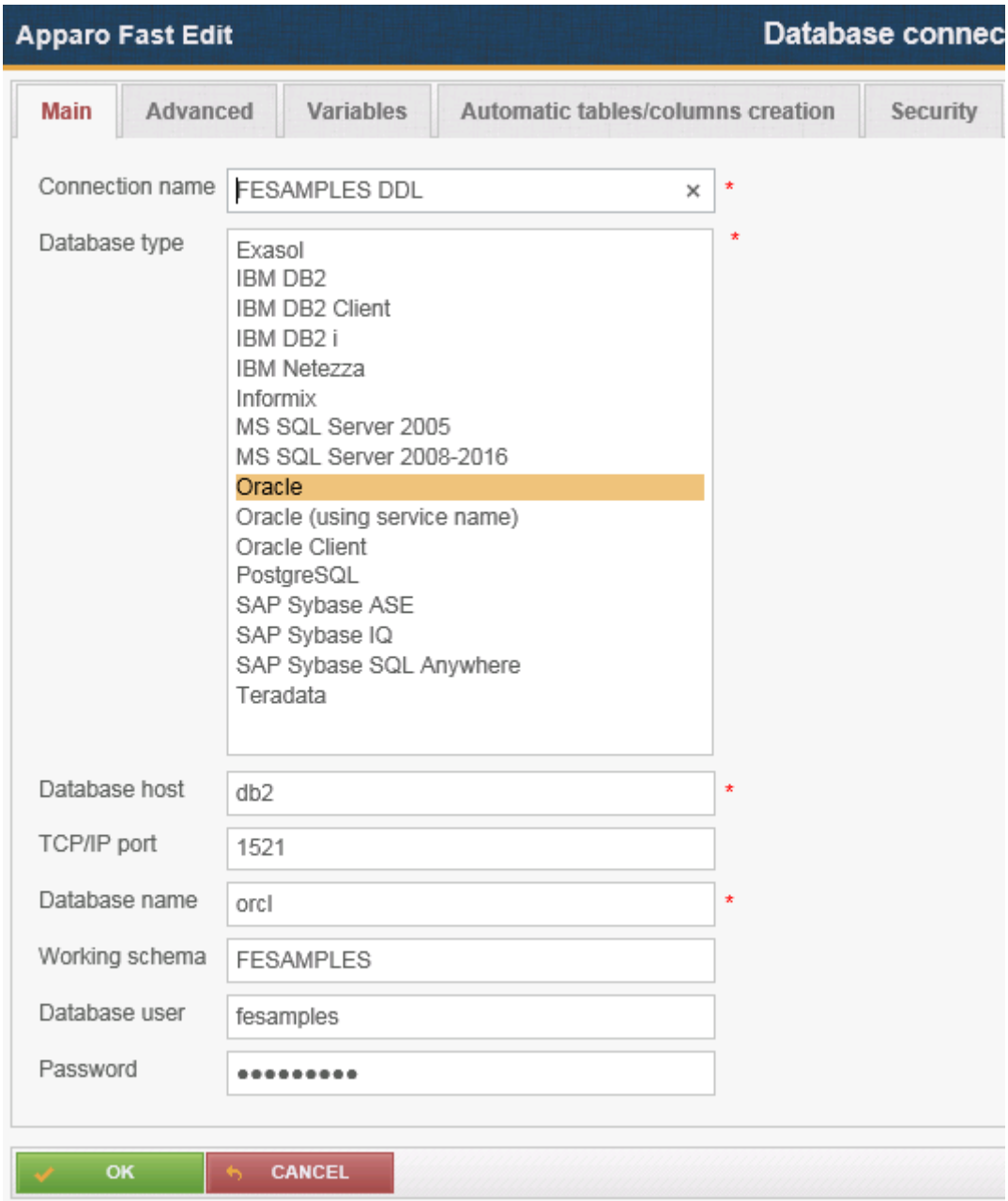
9.2 Create the required database connections

As mentioned in Chapter,Clients', you will need two different database connections.

9.3 Create a database connection to create tables / columns (DDL)

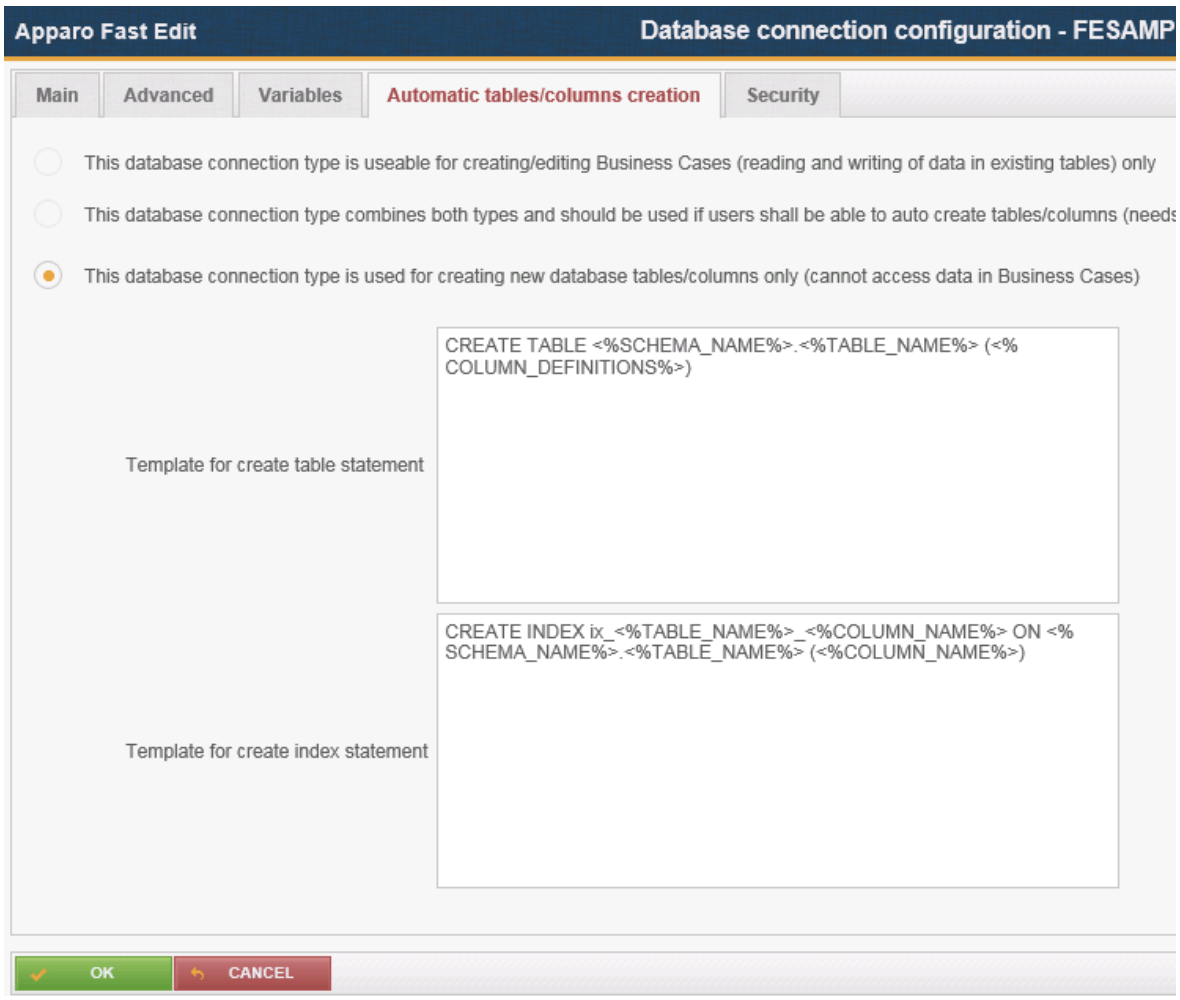
This database connection type also requires, in addition to read and write, the right to create tables.

First enter the required connection data:



Then select in the tab,Automatic table / column creation' the third radio button:

This database connection type is used for creating new database tables/columns only (cannot access data in Business Cases)

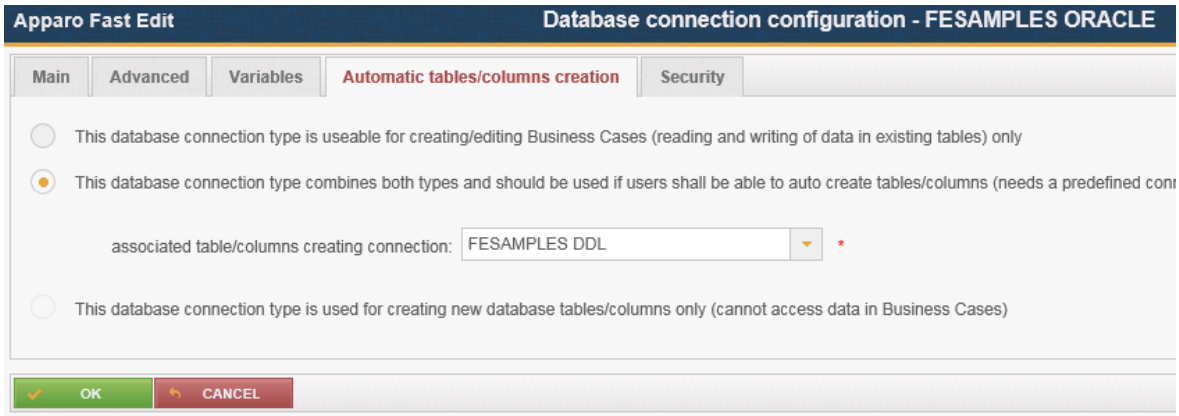


It is not possible to create with this DB connection Business Cases.

9.4 Creating and linking the DB connection type ‚read / write only (DML) '

After you have added the necessary connection information, select the in tab ‚Automatic table / column creation' the option ‚This database connection type combines both types and should be used if users shall be able to auto create tables/columns (needs a predefined connection for creating new tables/columns)'

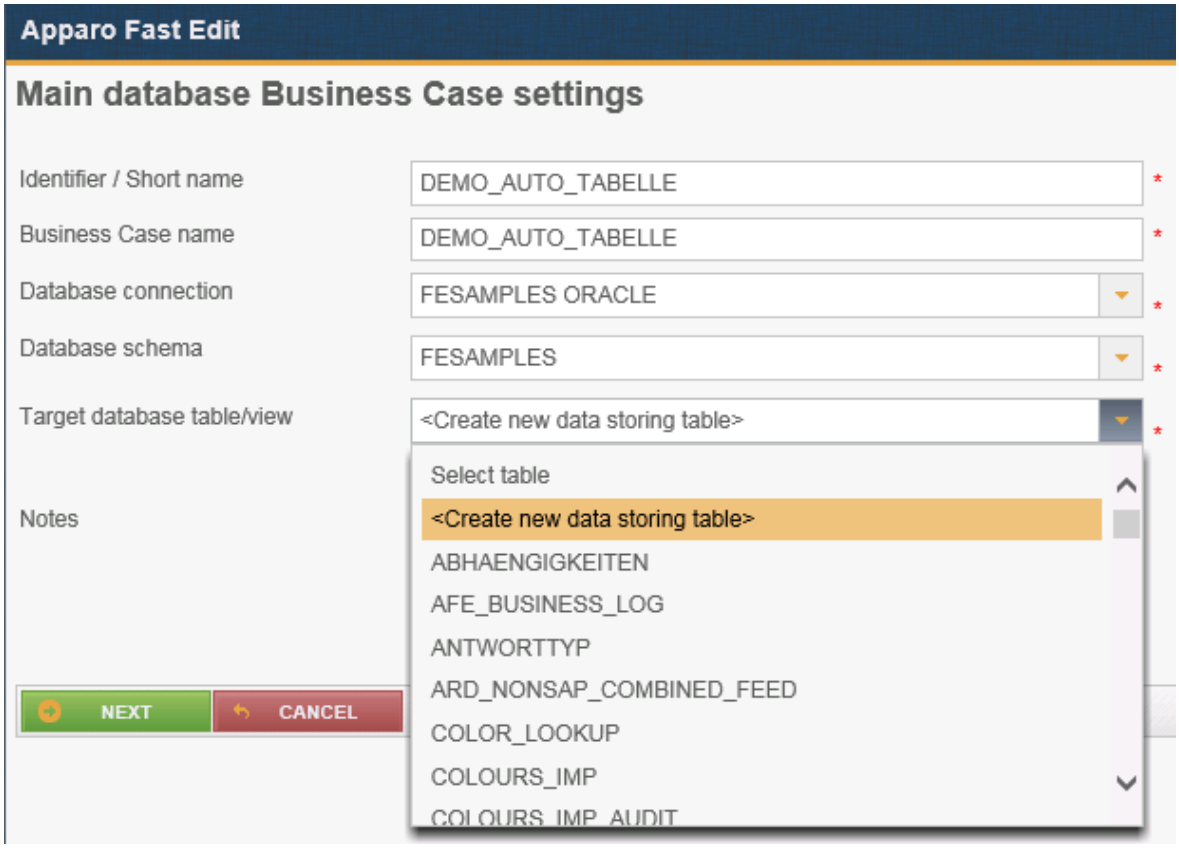
Then, assign the previously created DDL connection here.



This completes the setup of the database connection.

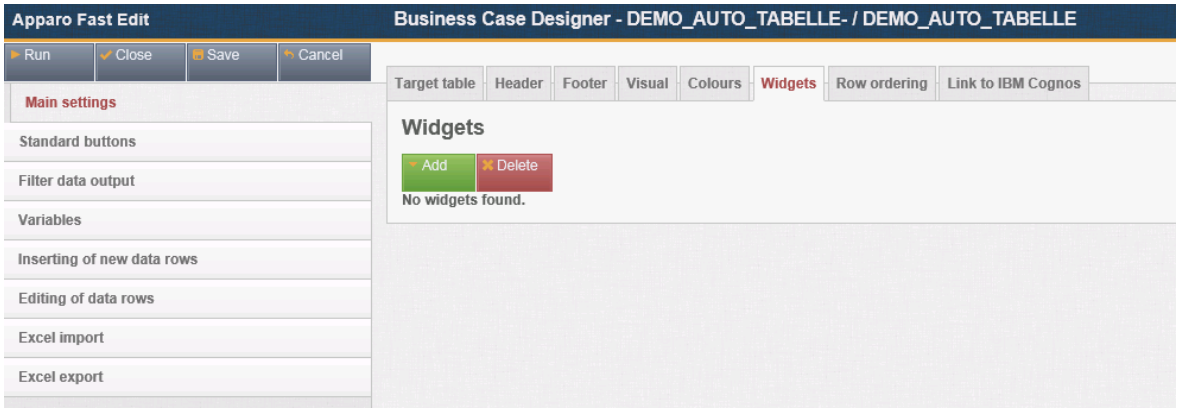
9.5 Automatically create a database table when creating new Business Cases

To create a new table when creating a new Business Case, select <Create new data storing table> in the setting ‚Target database table/view'

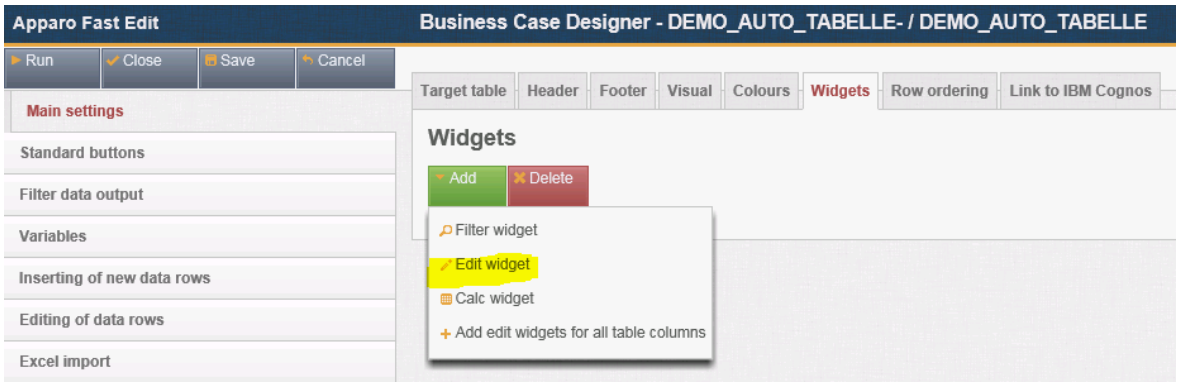


Afterwards please click on NEXT.

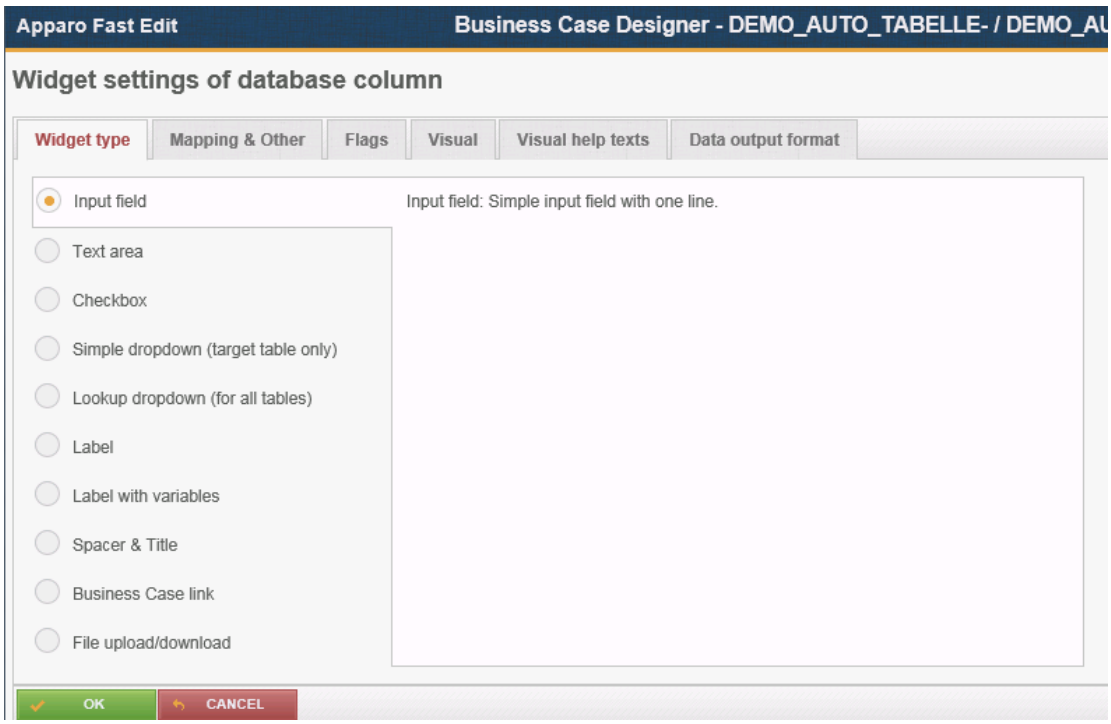
Then you will see a blank widget overview page.



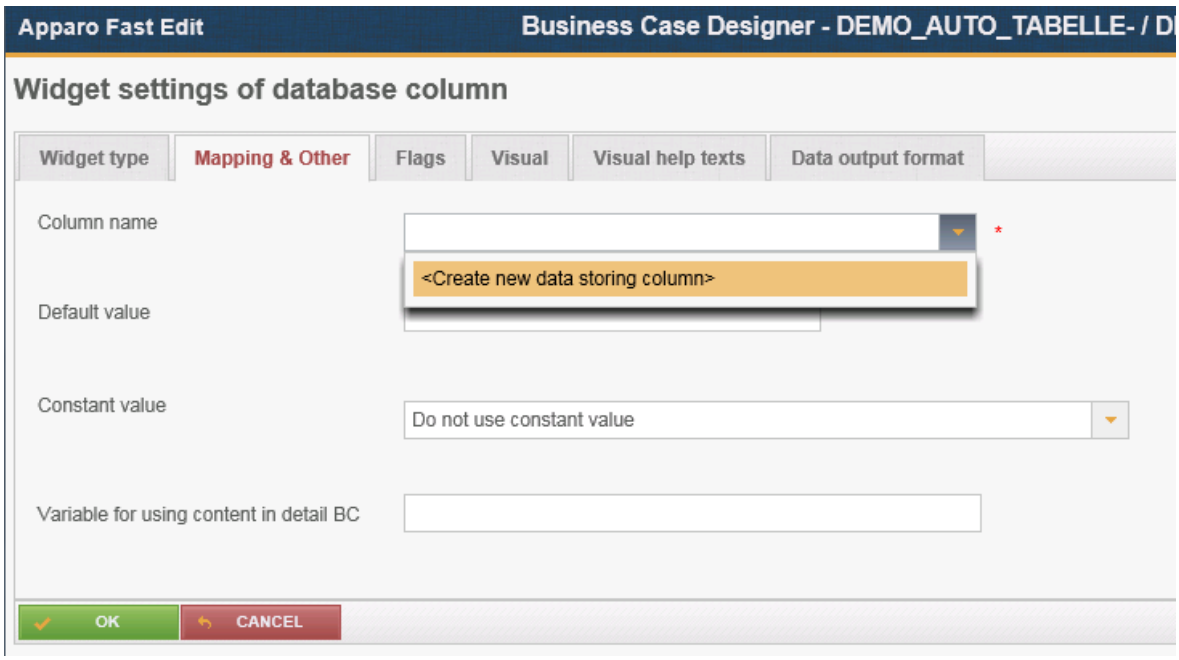
The table will not appear until you create the first Edit widget



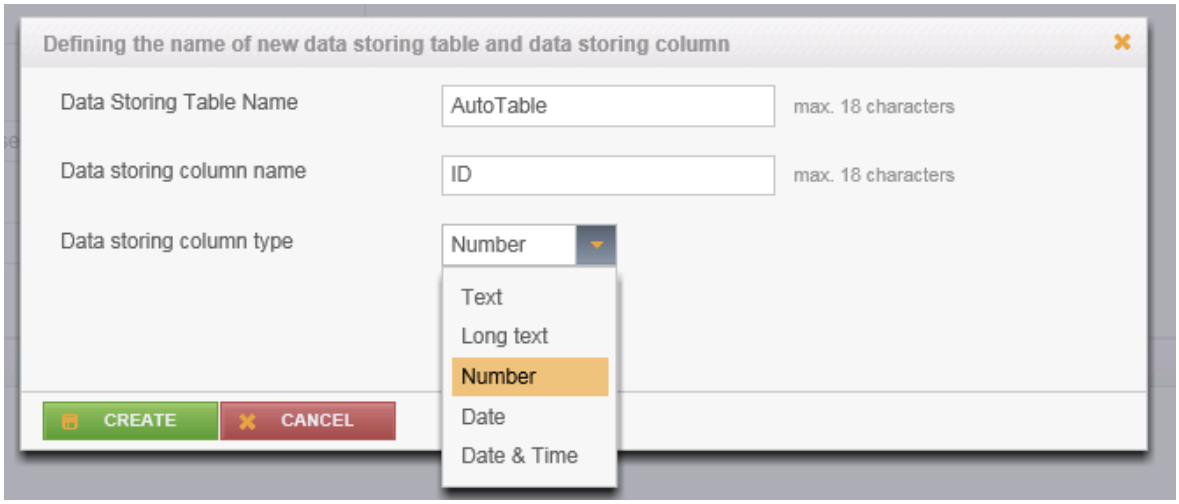
First, select the widget type



And then open the tab ‚Mapping and Other' and select in the setting column name '<Create new data storing column>'



Then a window will appear, in which you specify the table name and the column names and types.



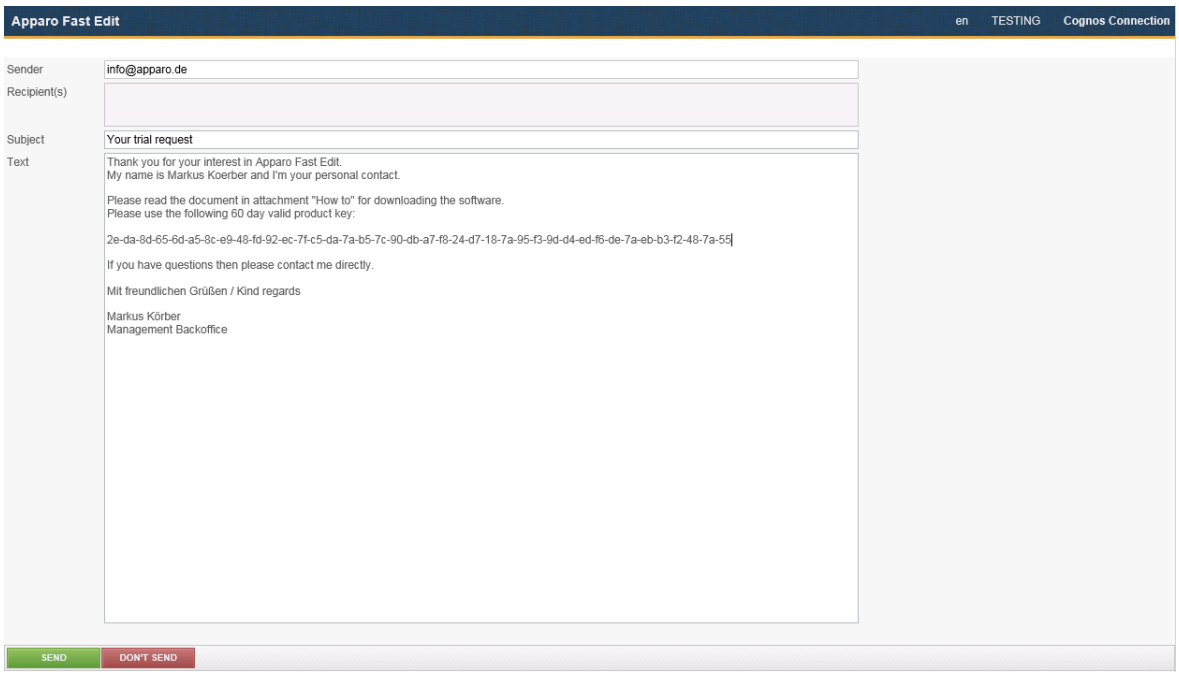
When creating further edit widgets then you will only be asked for the name and type for the new database column.

10 E-mail Business Cases (EBC)

An e-mail business case is used to send e-mails.

It contains the definitions, such as subject and body.
Content, recipient, etc. can be made dynamic with variables.
An e-mail business case is called usually by button from Single or Table business cases.

An e-mail business case can access all the widget reference variables of the current line.
All other variables can also be used.

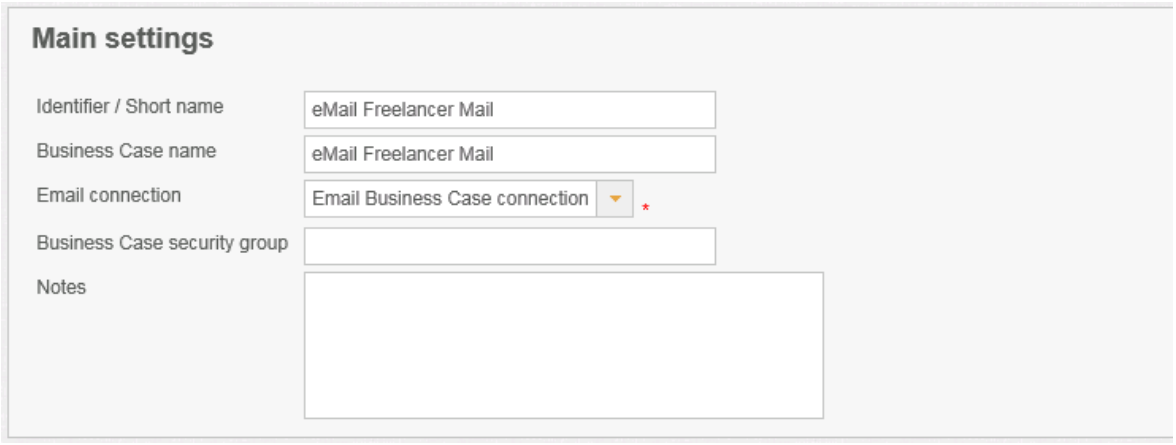


10.1 Creating an EBC

When you create an e-mail business cases you have to fill first, like all other types of business case, the general settings.

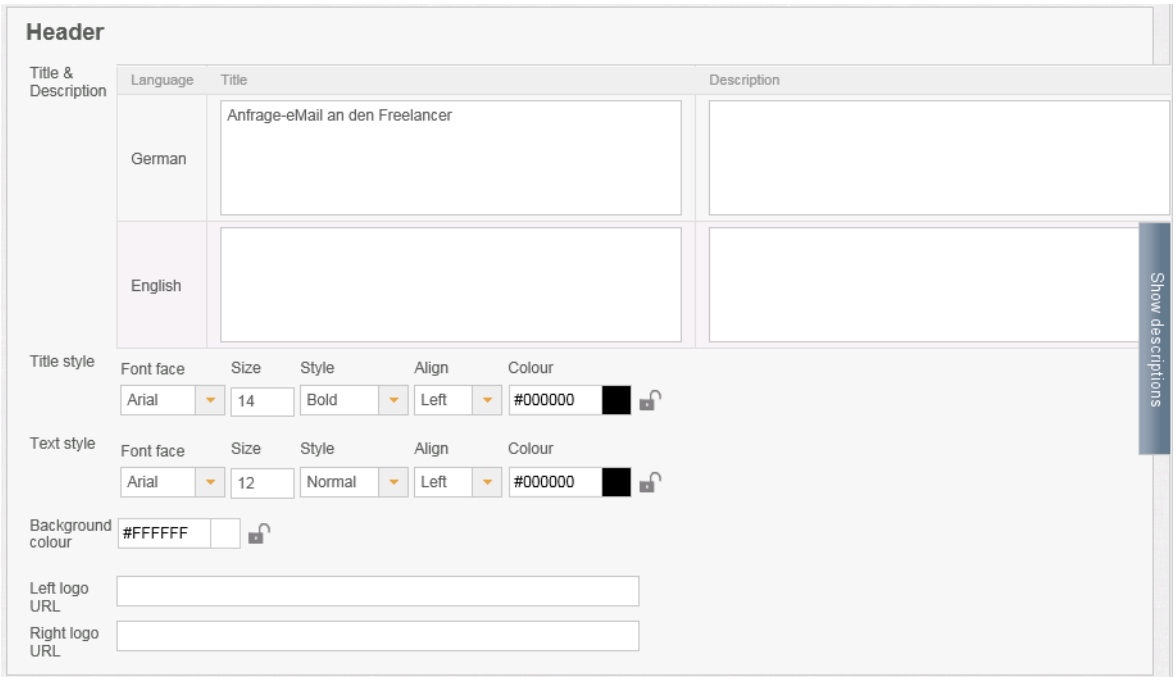
The email connection is used only to send and can also be used in other e-mail business cases.

The optional security group ensures that only authorized users can send e-mails.
A number of security groups are to be entered separated by a comma.



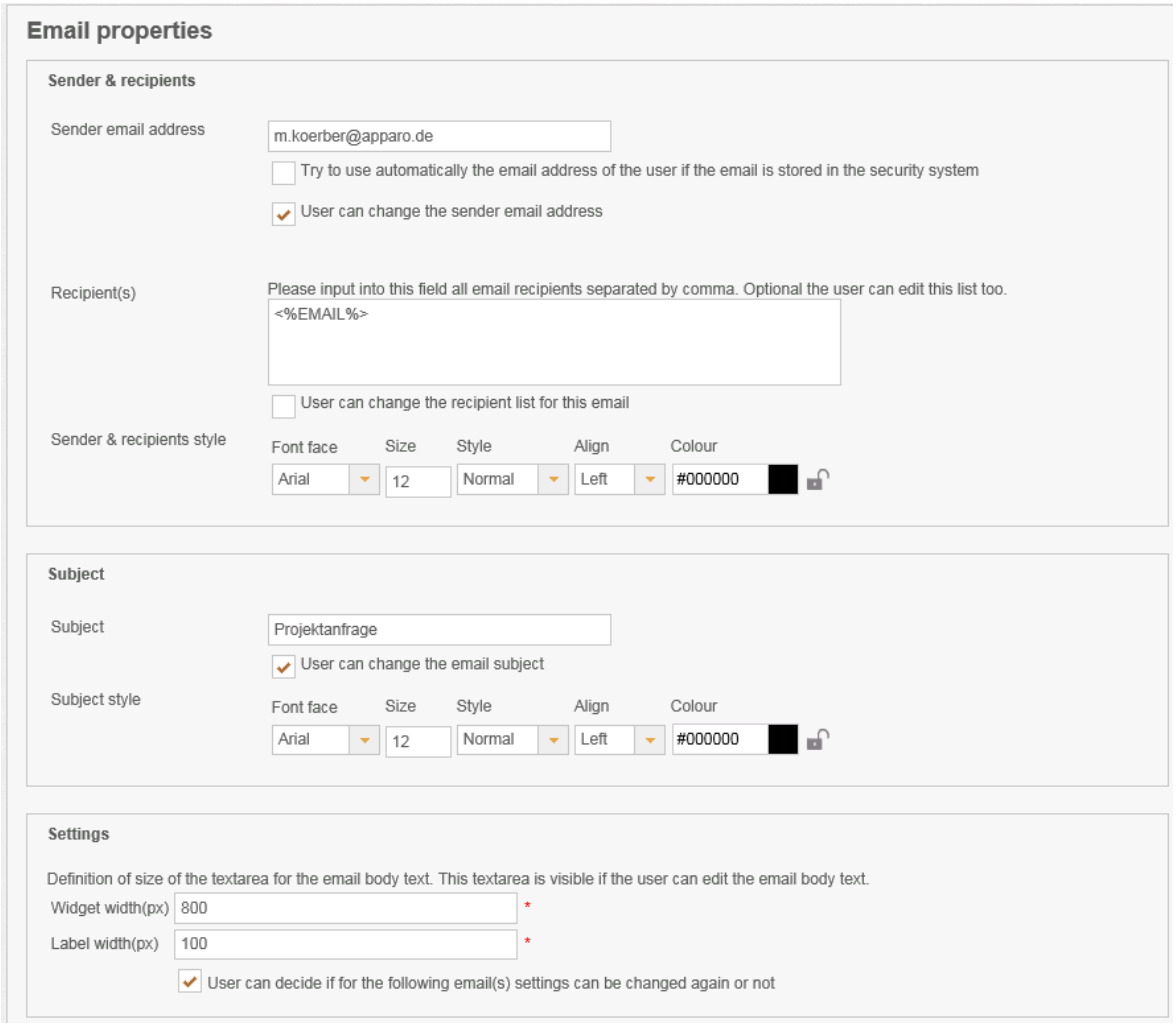
10.2 Header and Footer

In the header or footer, you can define captions and descriptions, specify fonts and styles and insert logos.
In the title, the description and the logo URL variables can be used.



10.3 E-mail properties

Here you can define the sender e-mail, the recipient list and their settings.



Sender & Recipients

Sender email address

Does the indicated in the e-mail sender address this need not match the e-mail sender from the e-mail link.
Variables can be used.

Options:

- Try to use automatically the email address of the user if the email is stored in the security system
- Users can change the sender address

Recipient(s)
Contains all recipients, separated by commas.
Variables can be used.

Optionally, the user can modify the list.

Subject

Contains the subject of the e-mail, variables can be used.
Optional user may change the subject.

Settings

Defines the size of the text area for the e-mail text (visible if the user is allowed to change the e-mail text.

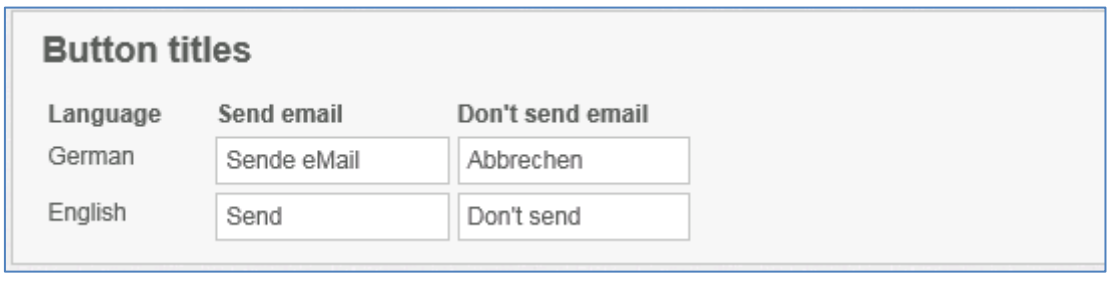
- Widget Width (px)
- Label Width (px)

10.4 E-Mail body

Contains the 'E-mail Body', also known as e-mail text.
If you use formatted text, the email HTML format is used.
You can use all the variables of the calling business cases.

10.5 Button titles

Contains the label of the buttons in all installed languages



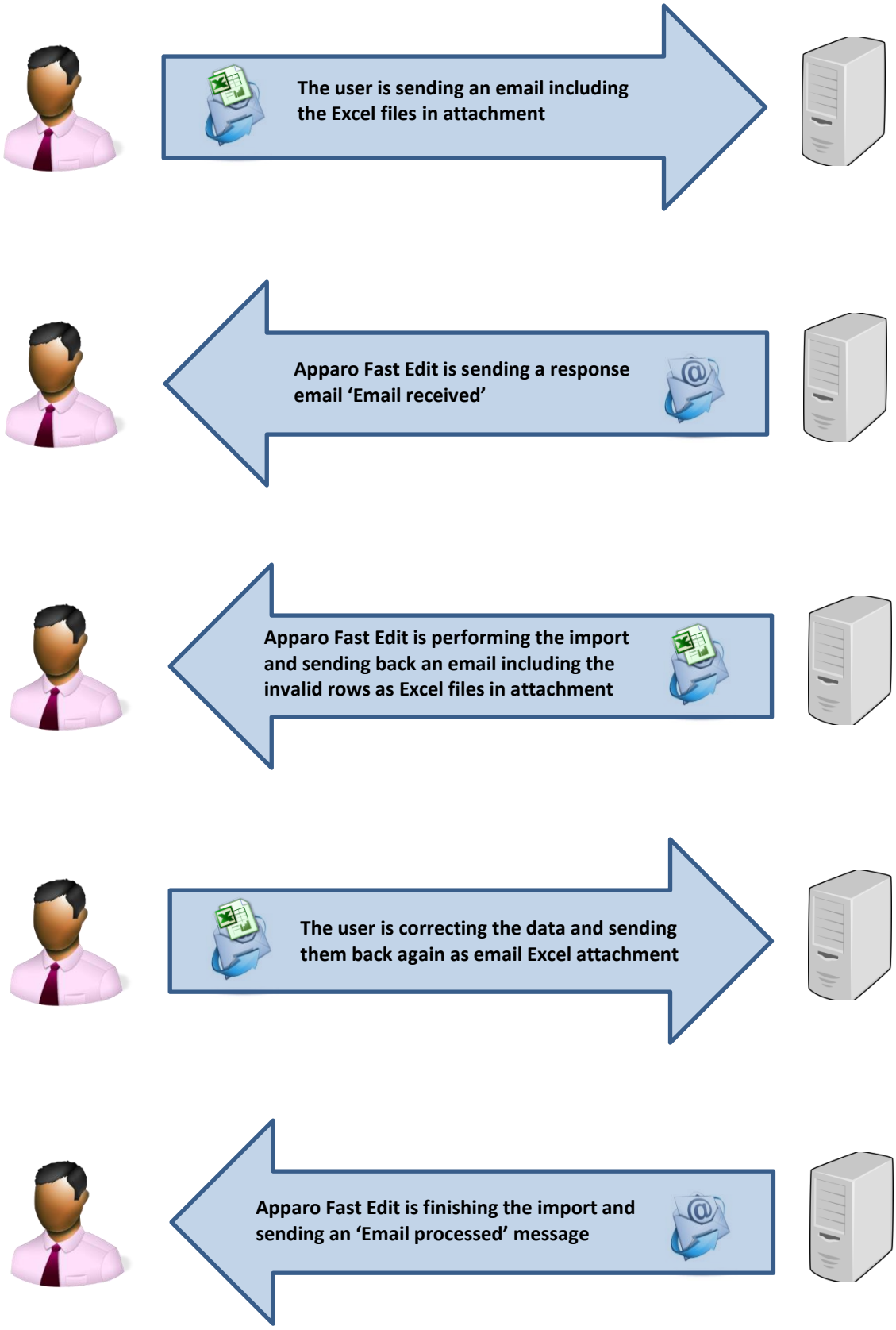
11 E-Mail Import Business Case (EIBC)

The Excel Email Import feature enables you to import data that is stored in Excel files (CSV, XLS and XLSX) from email attachments.

That means the user can send an email with **Excel files in attachment and the data of these Excel files will be imported automatically in your relational databases**.

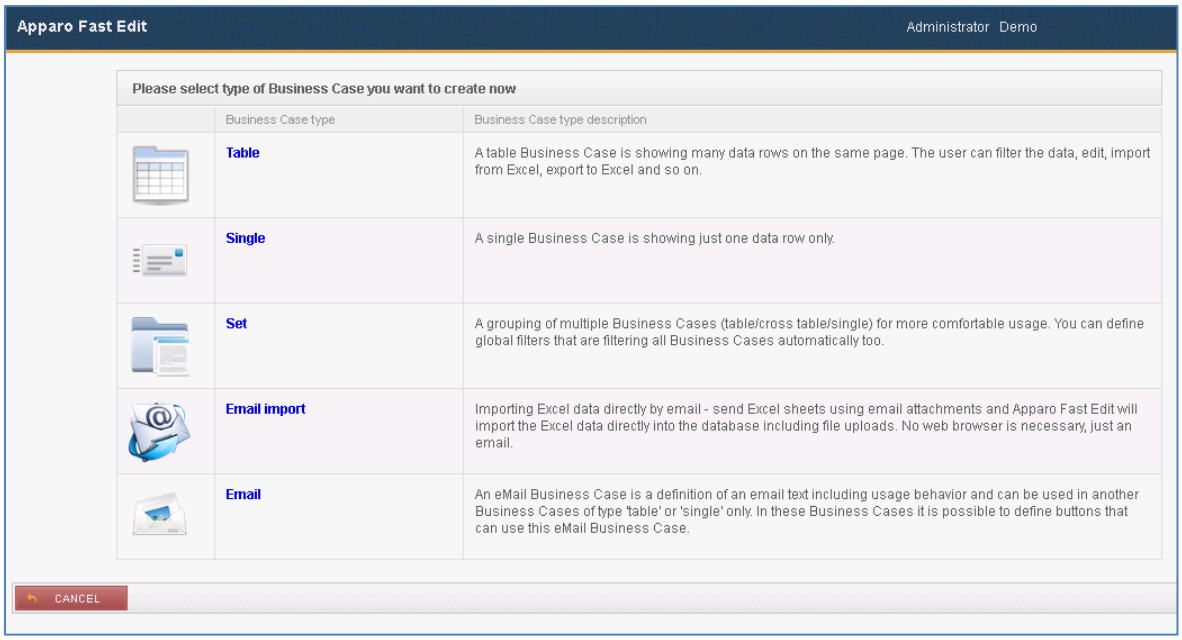
The user is getting automatically answer-emails that are informing the user about the progress or data quality issues.

All activities can be logged in database table, the emails and attachments can be stored physically on the server.


The user is sending an email including the Excel files in attachment
Apparo Fast Edit is sending a response email 'Email received'
Apparo Fast Edit is performing the import and sending back an email including the invalid rows as Excel files in attachment
The user is correcting the data and sending them back again as email Excel attachment
Apparo Fast Edit is finishing the import and sending an 'Email processed' message

11.1 Creating a new Business Case of Type ‘Email Import’

When clicking on New Business Case in the Business Case list the following selection list will appear:



Click on Email Import to create a new ‘Email Import Business Case’

For the setup we will need a pre-defined email connection and at least one database connection, used for the Business Case that will perform the import.

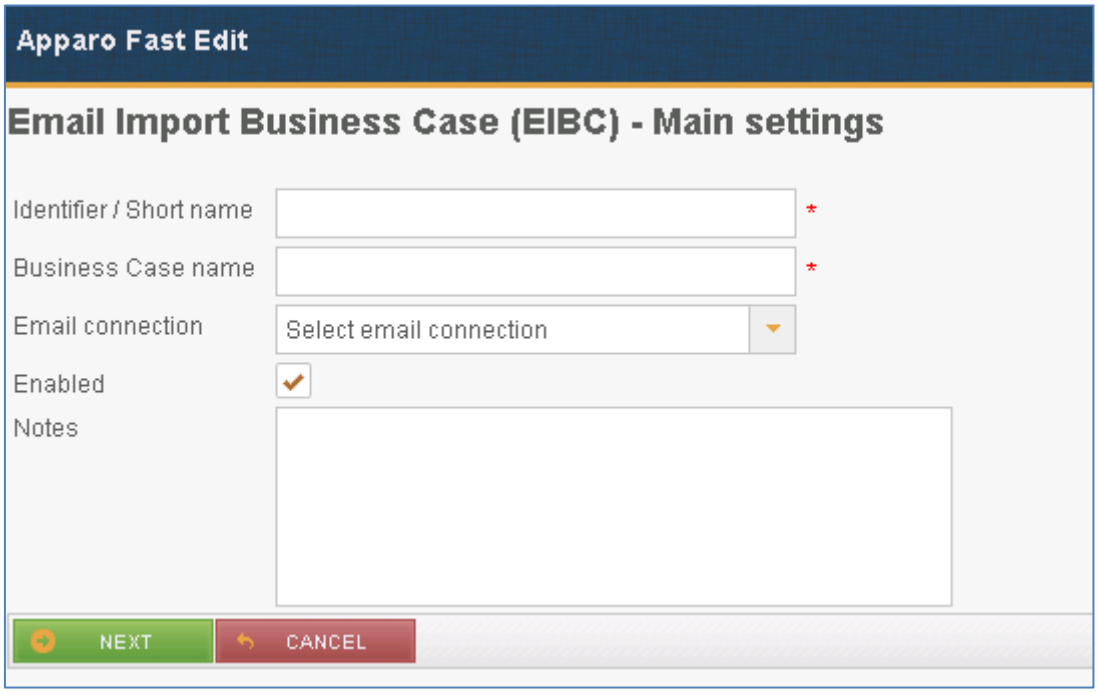
These Business Cases are also containing all definitions for securing the data quality.

The Business Cases must have activated the Excel file import feature.

11.1.1 New Business Case - Main Settings

The main settings require the following settings:

- **Identifier:** The short name of the Business Case (must be unique)
- **Business Case Name:** This name will appear as name when we link the Business Case to the portal
- **Email connection:** The email connection for sending and receiving emails
- **Internal description:** Optional. For documentation purposes only.

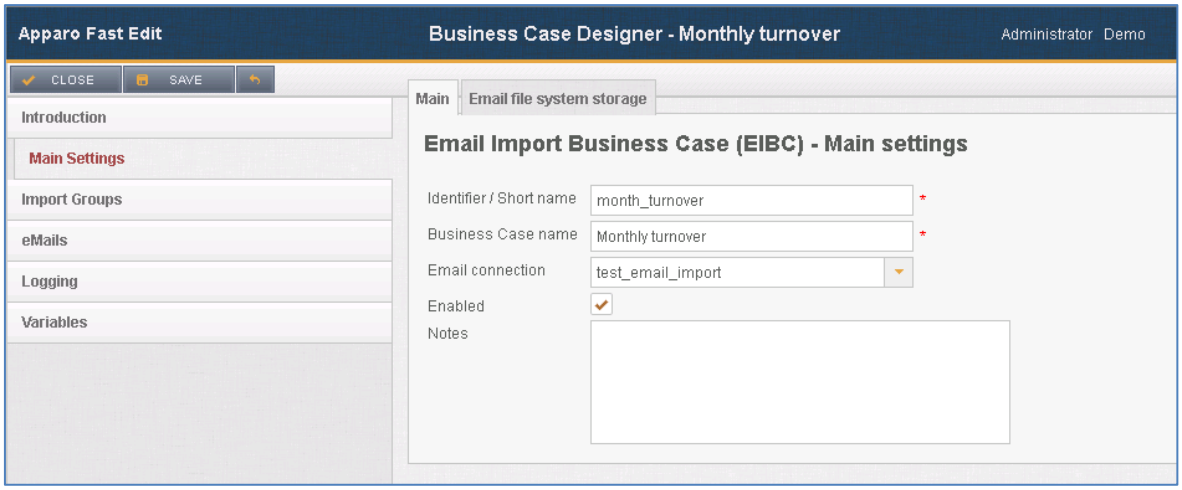


Fill all necessary fields and click 'Next' to create the Business Case

11.2 Overview of all possible settings

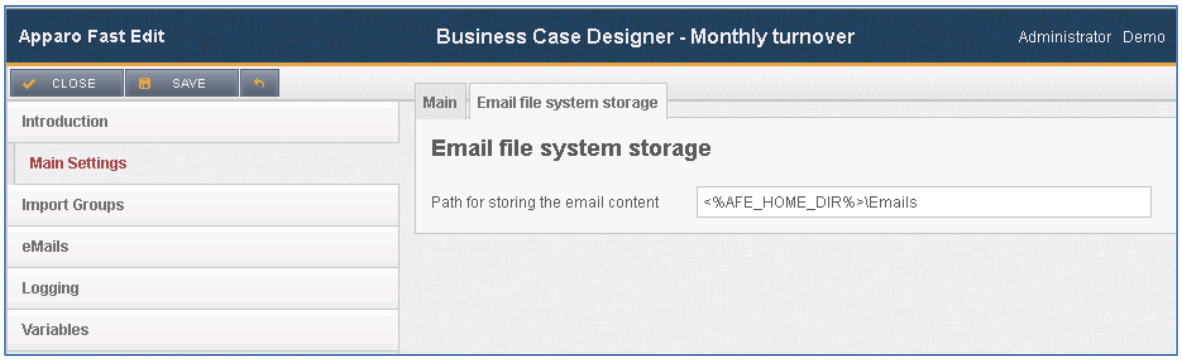
Once the Business Case is created we will see the following overview.
Here you can save and close the Business Case and click though the tabs of the settings:

- **Introduction:** Contains usage examples and explanations
- **Main Settings:** Contains the main settings and the server path for storing emails and attachments
- **Importing Groups:** Contains the import groups, the detailed settings how shall be imported
- **eMails:** Here you can define the text of a failure email, for the case that no import group is matching
- **Logging:** Contains the logging settings, details like user name can be mapped here to a database column
- **Variables:** Contains predefined variables and you can create own JavaScript variables



11.3 Main Settings

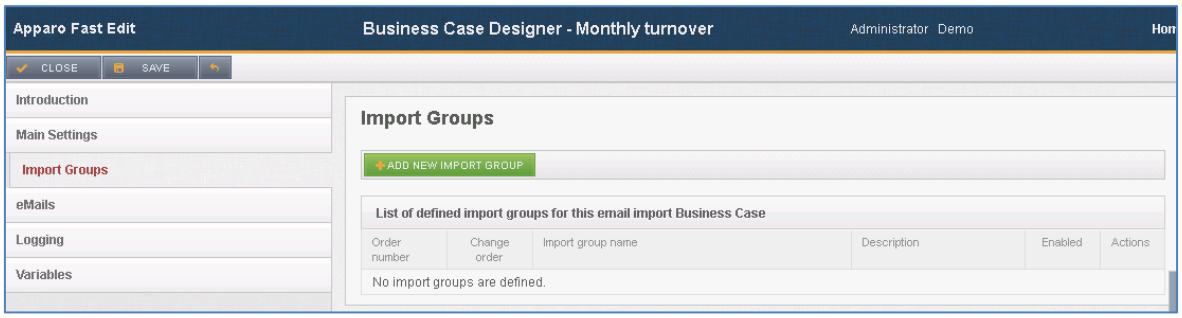
This tab contains, beside from the main settings, the path for storing emails and attachments physically on the server.



email file system storage

11.4 Importing Groups

An import group contains the definitions what attachments are expected and what Business Case shall perform the import. It also contains the security settings, log settings and the response email texts.

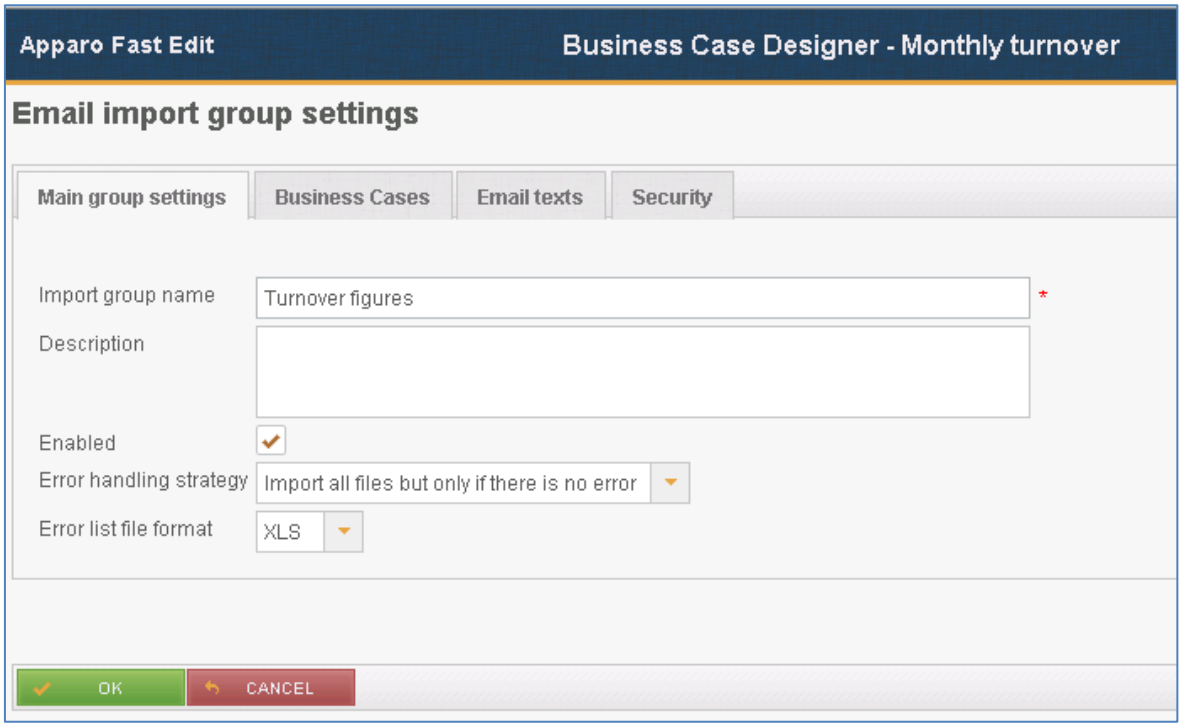


Adding a new import group

11.5 Importing group settings

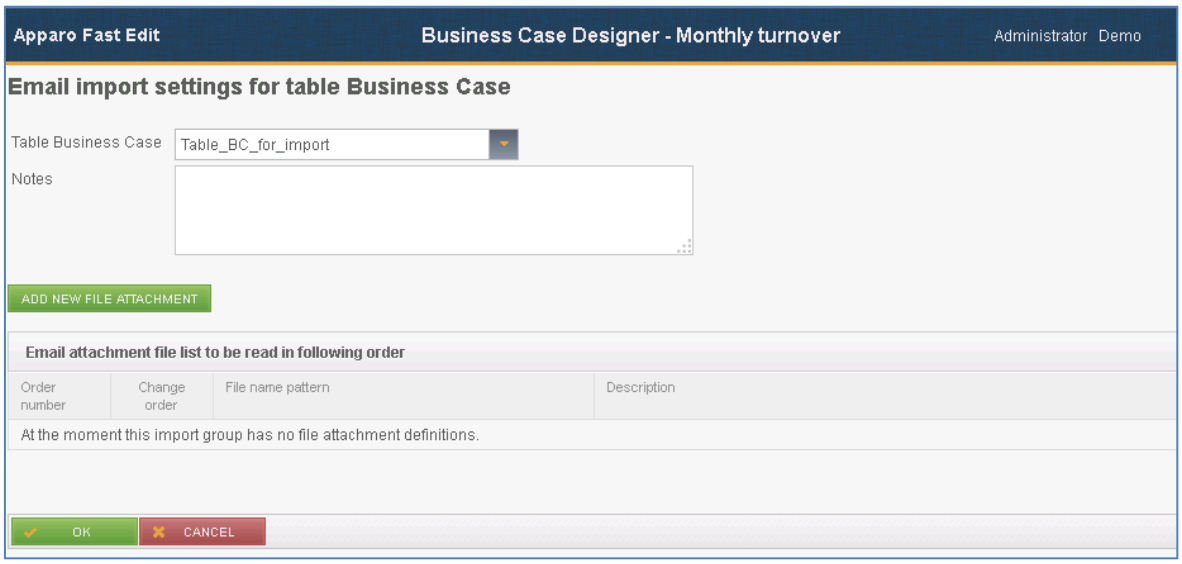
11.5.1 Main group settings

It contains the import group name (unique) and an optional description text.
You can enable or disable the import group here.



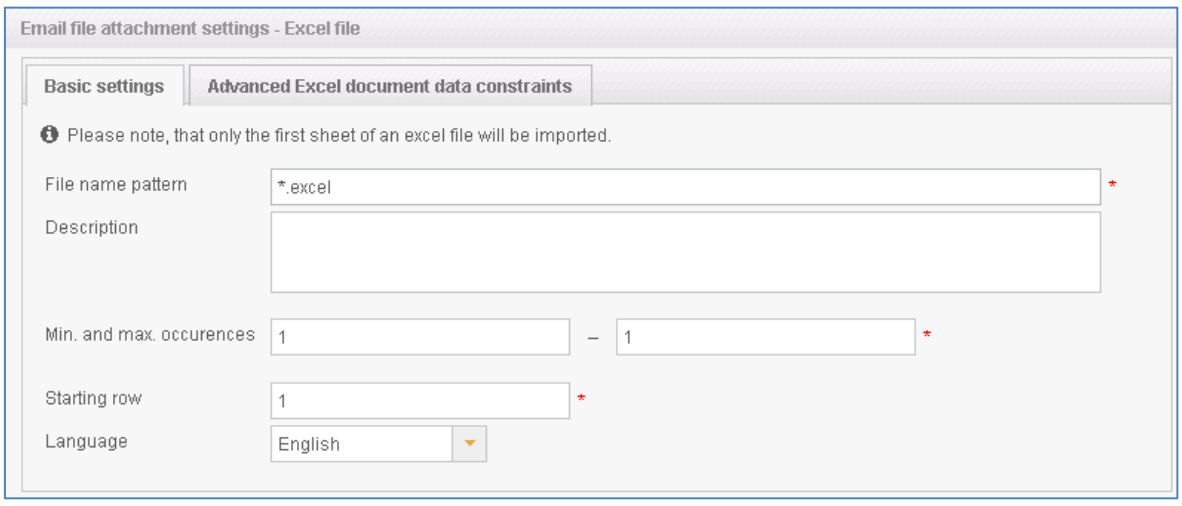
11.5.2 Business Cases

Contains the mapping to all Business Cases that are defined to perform the import. When an email from a valid sender arrives, Apparo Fast Edit automatically analyses the structure of the attachments and comparing the structure with the defined import groups.



11.5.3 Add new attachment

You need to define at least one email attachment for every defined importing Business Case.



Creating a new file attachment

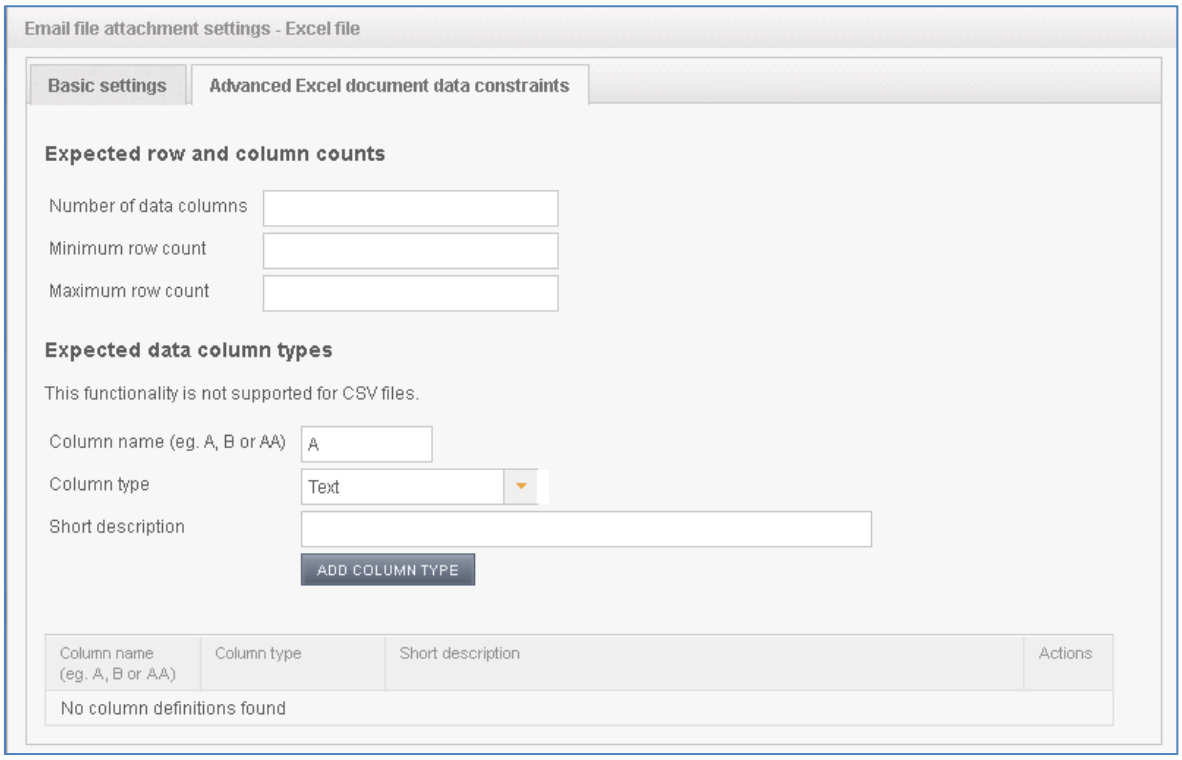
The following properties are expected:

- **File name pattern:** Defines the allowed file extension (*.excel allows all Excel files: .xls, .xlsx, .csv)
- **Description:** For the internal documentation
- **Starting row:** For the case the contains a header in row 1, we start the import in row 2
- **Min and Max occurrences:** The minimum should be at least 1 – the user gets an error email if the attachment contains less attachments than expected
- **Language:** Important for language sensitive data types e.g. date

11.5.4 Advanced Excel document data constraints

This feature is optional:

Here you can define the expected data column types, this feature allows Apparo Fast Edit to better distinguish similar Excel file attachments.



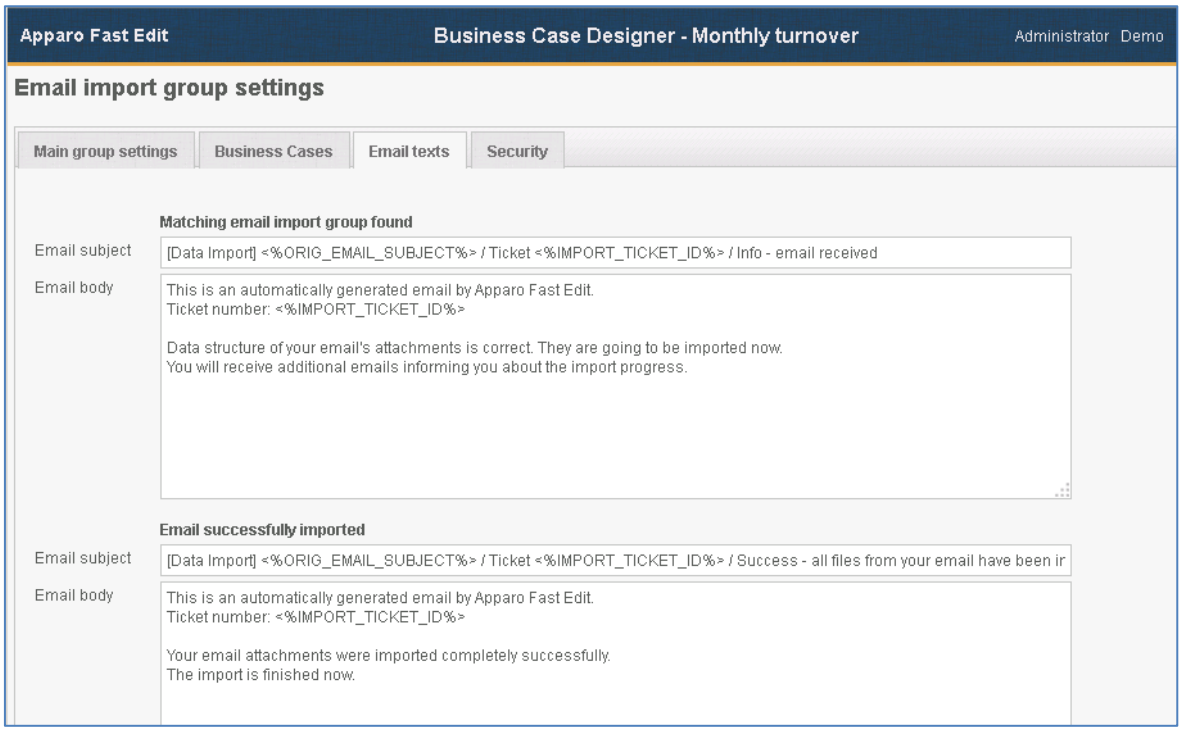
Expected data column types

11.5.5 Email texts

Contain the bodies of different auto response emails.
Optional. When empty, no email will be sent.

There different kinds of response emails:

- **'Matching email import group found':** Sent when email received
- **'Confirmation email':** Sent when confirmation by user is necessary
- **'Security constraints not met':** Sender does have the required rights for the import
- **'Email processing cancelled because of error':** Sent in case of data errors and the import is set to 'Cancel the import in case of errors'
- **'Errors occurred, but import was performed':** Sent when the import is finished with errors
- **'Email successfully imported'**
- **'Limited access prevented email processing':** The feature 'limited access' is activated and prevents the import
- **'Error list':** Email with file attachment containing all erroneous rows



Auto response email texts

11.5.6 Security

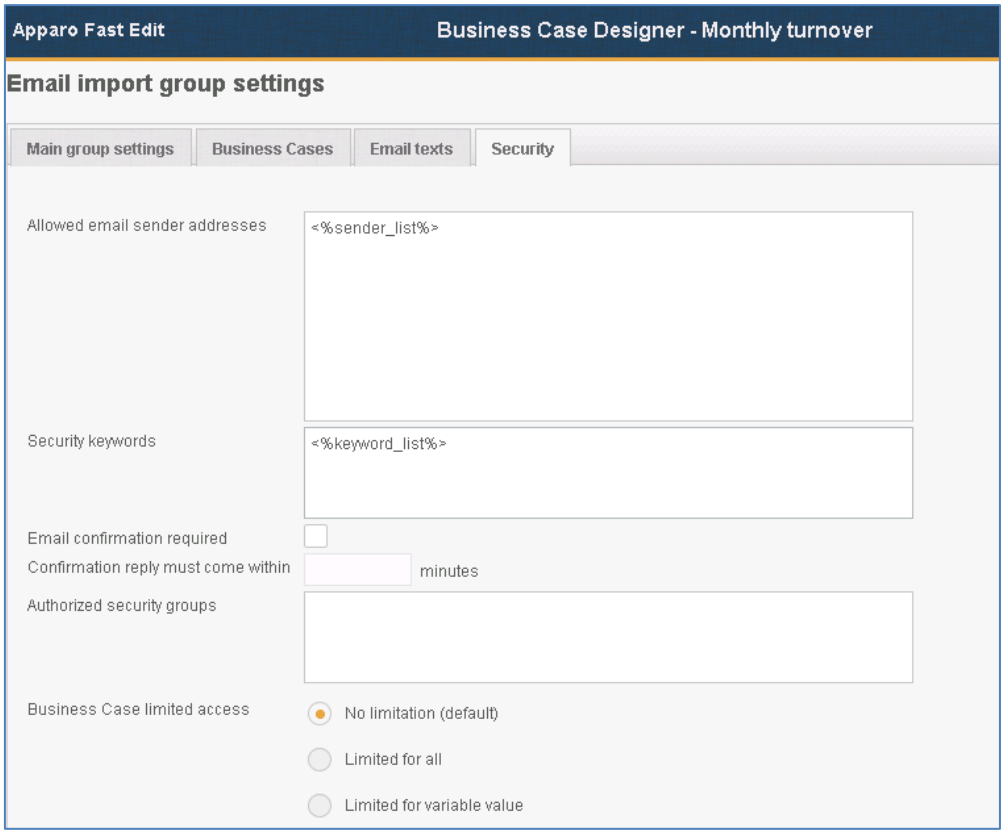
The email import can be secured:

- by limiting the allowed email senders (as list of email addresses)
- by limiting the email senders based on a security group:
  - the user account including email address must be stored in an MS Active Directory system
- by using a text keyword that must be delivered in the subject or body of the email
- by enabling a confirmation email (an automated email is returned to the sender, which has to be confirmed within a defined timeframe)
- by a list of trusted email servers (only emails of listed servers are accepted)

  All emails can be encrypted using SSL

The general access can be restricted by using the limited access feature in the tab 'Security':

- **No limitations:** Default value, no restrictions
- **Limited for all:** Nobody can use this import group
- **Limited for variable value:** Not useable if a variable return 'true' – e.g. a variable returns true during the time period when the database is performing maintenance tasks

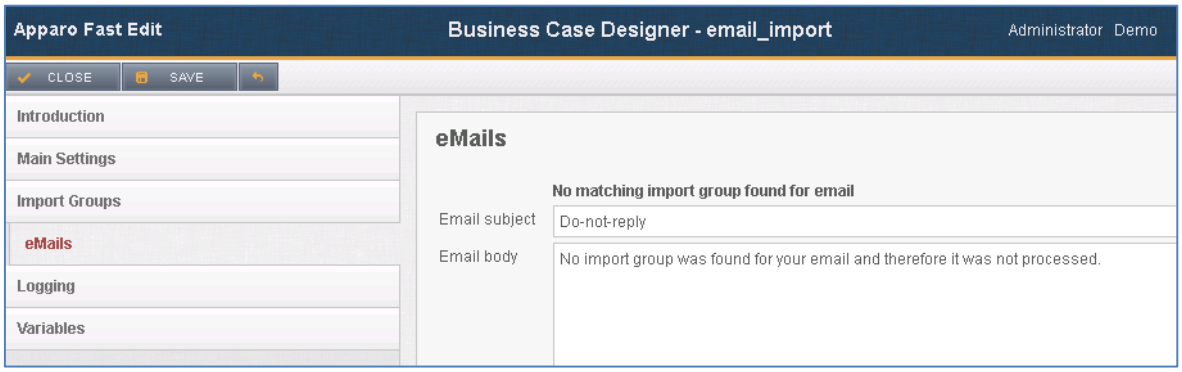


11.6 eMails

It contains the general error message for the case that no matching import group could be found to perform the import.

This can have different causes:

- Erroneous setup of import groups
- Erroneous attachments (e.g. file does not match the file import template)
- The import group can be temporary disabled by the administrator
- disabled by a variable (e.g. a time controlled variable to avoid issues during a maintenance period)



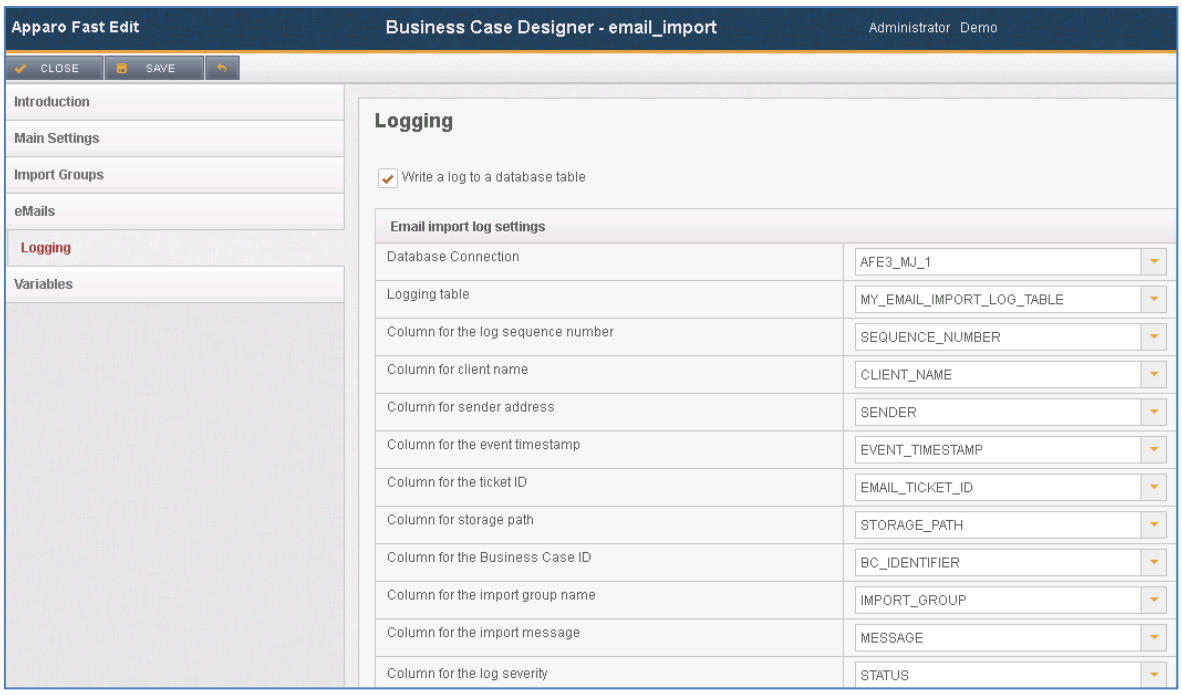
General error message

11.7 Logging

All events can be logged into an own database table.

In order to log all possible values the table will need the following columns:

- **Column for client name:** What client was used for the import
- **Column for sender address:** What sender address tried to import
- **Column for event timestamp:** Timestamp
- **Column for ticket ID:** Ticket ID, unique ID for the import event
- **Column for storage path:** Where is the email and attachment stored
- **Column for Business Case ID:** What Business Case performed the import
- **Column for importing group name:** What import group performed the import
- **Column for the import message:** Plain text with error message
- **Column for the log severity:** Can be warning, error, info or debug
- **Column for the message code:** A number representing the message

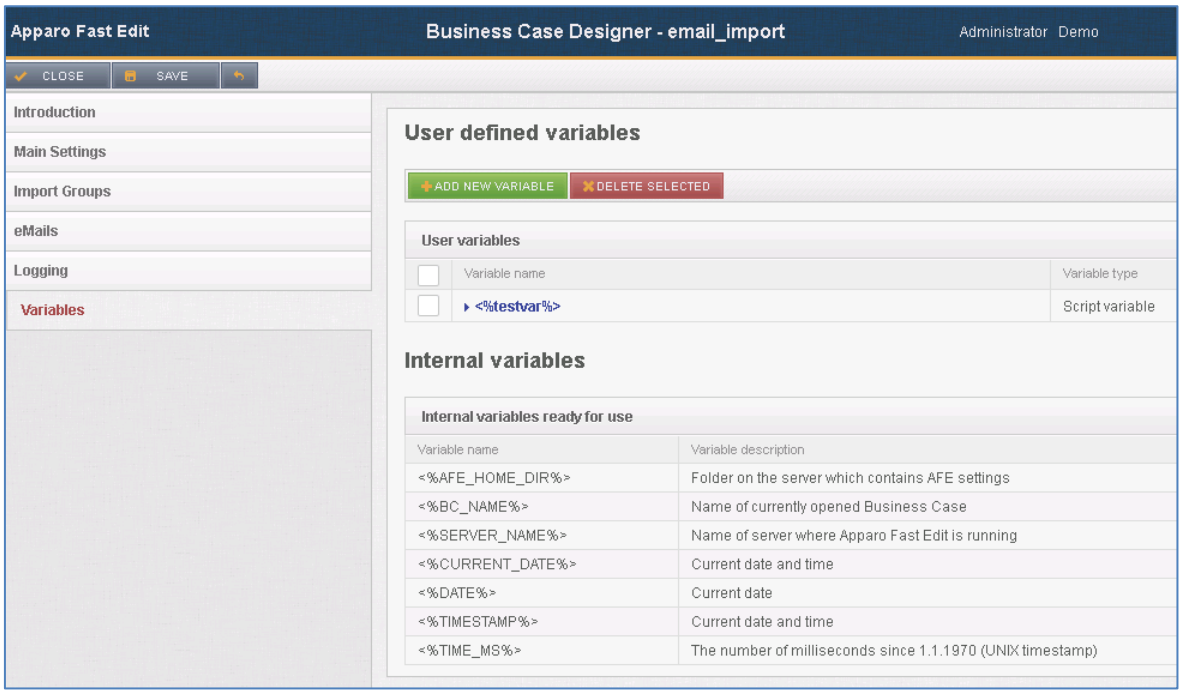


Mapping of the database table based log

11.8 Variables

Allows to create own JavaScript variables.
Hint: JavaScript variables can perform SQL too.

There is a list with pre-defined variables, ready to use.

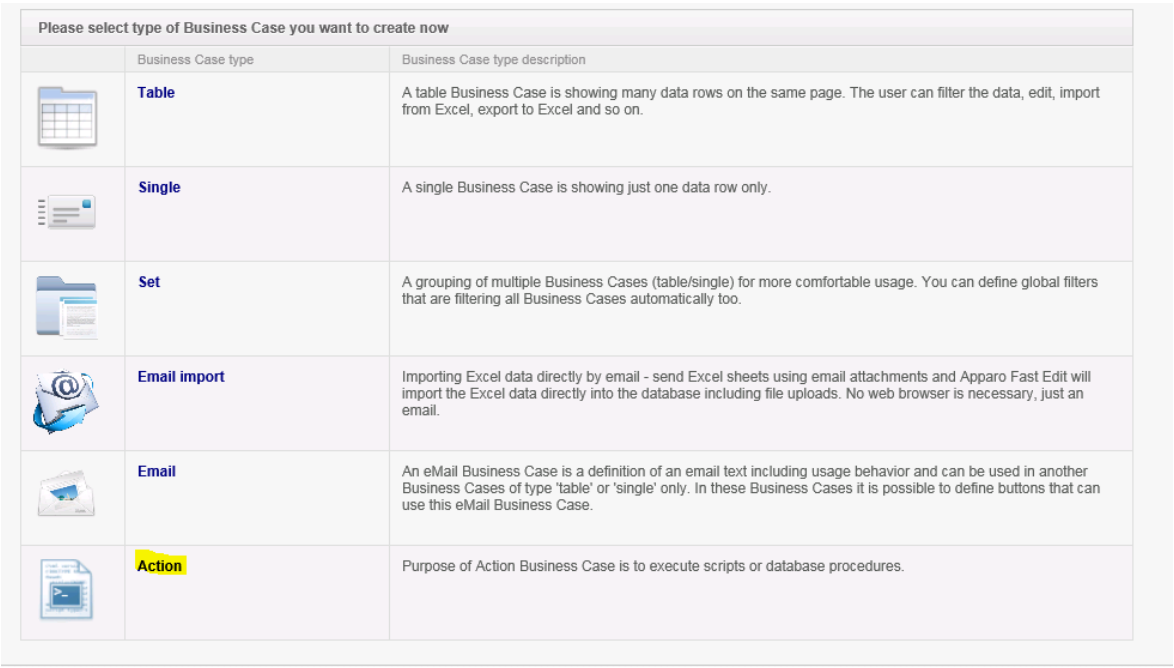


12 Action Business Cases (ABC)

Action BC is helpful for adding database action like changing data, calling scripts server side without user interactivity. It is possible to call an Action BC using AJAX.

An Action BC can contain own web output too, even buttons like yes/no are possible.

An Action BC cann call database procedures or scripts automatically.



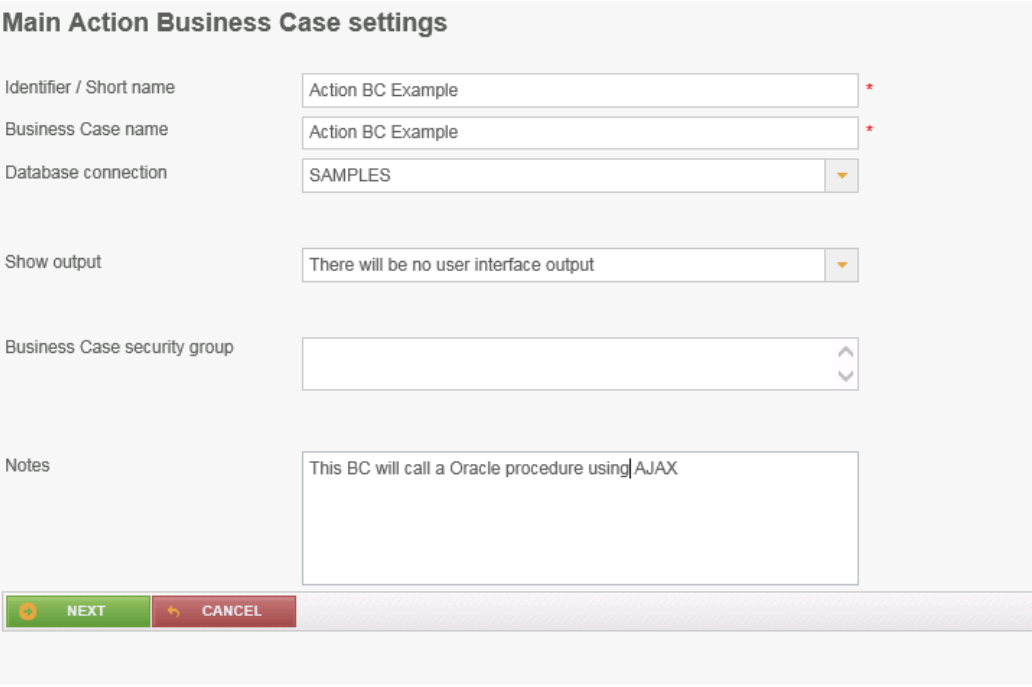
You can find an execution example for AJAX and Cognos Report Studio in tab “Link to IBM Cognos” in the detail description. This example is using jquery as framework on the client side.

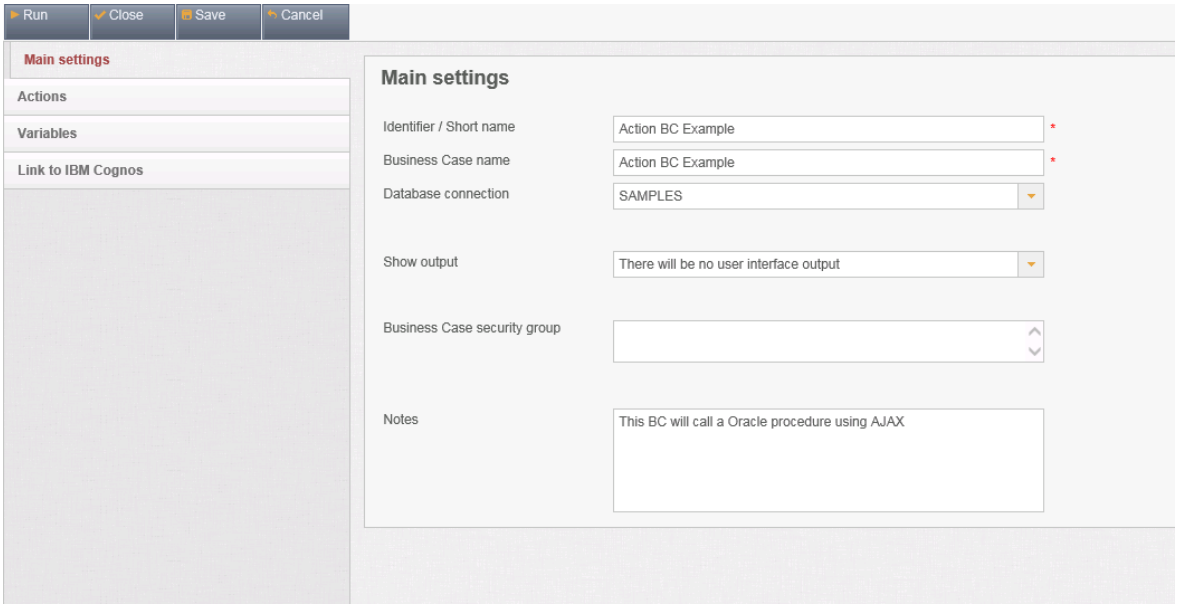
12.1 Example for calling a database function using AJAX

12.1.1 Create a new Action Business Case

Select “Action” and define the main settings:

Please use a database connection too because later it is necessary to define a database procedure that must be called automatically.





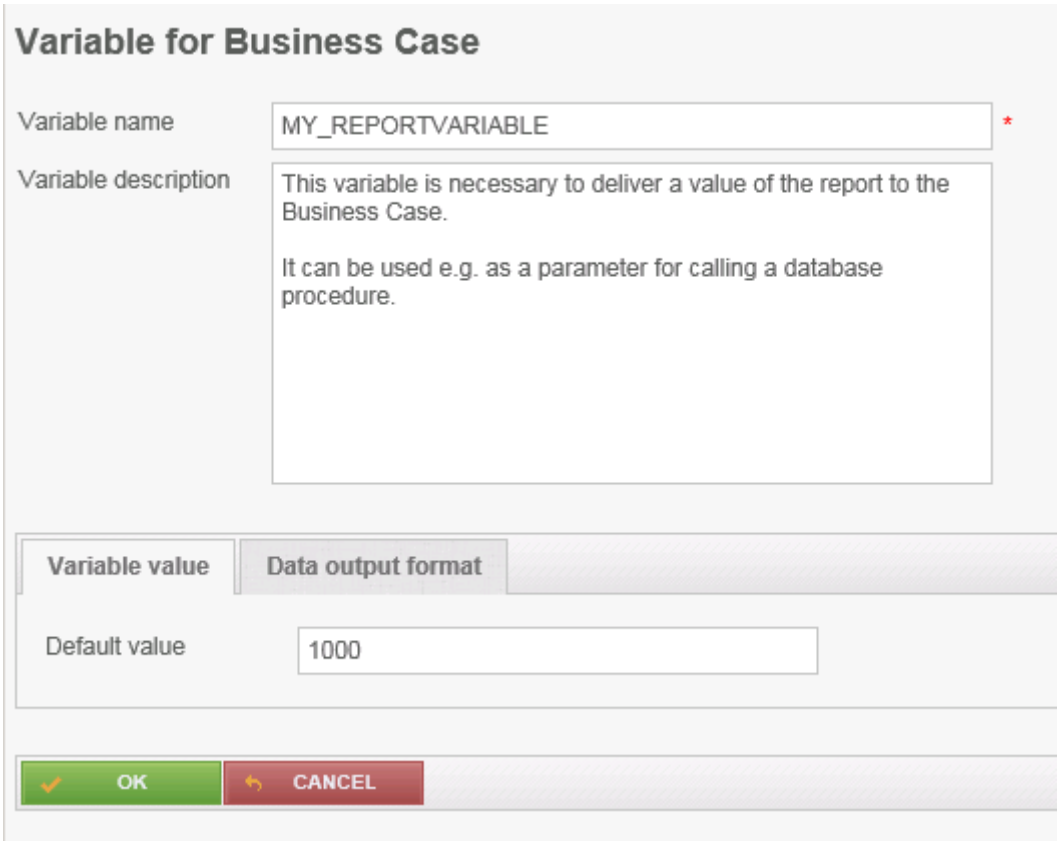
12.1.2 Define a report variable

Please click to tab “Variables” and add a new variable.

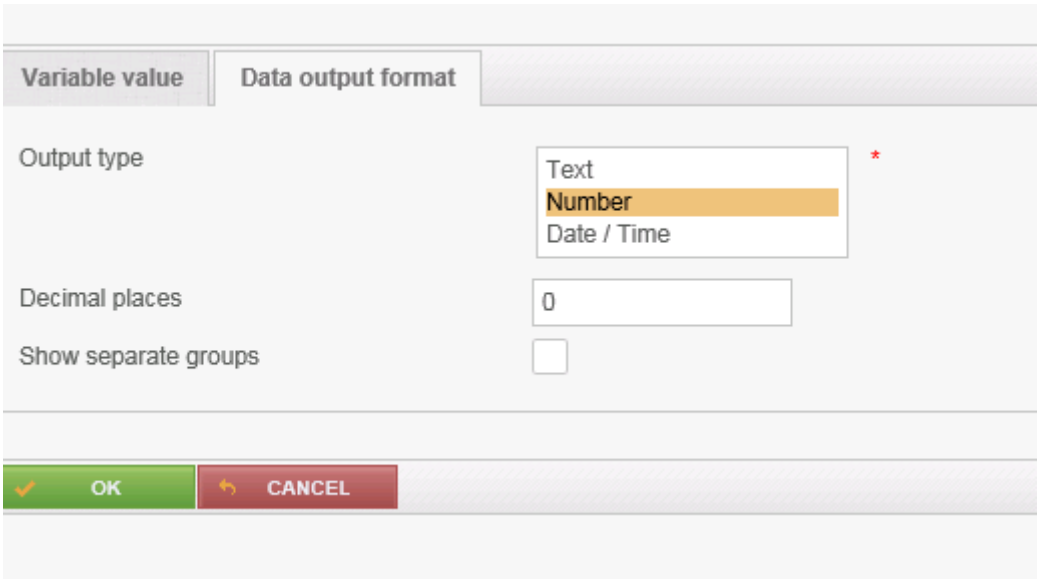
Select “Report variable”.

The report variable is helpful for delivering a value from the Cognos report to this Action BC.
It will be used later as a parameter in the call of the database function.

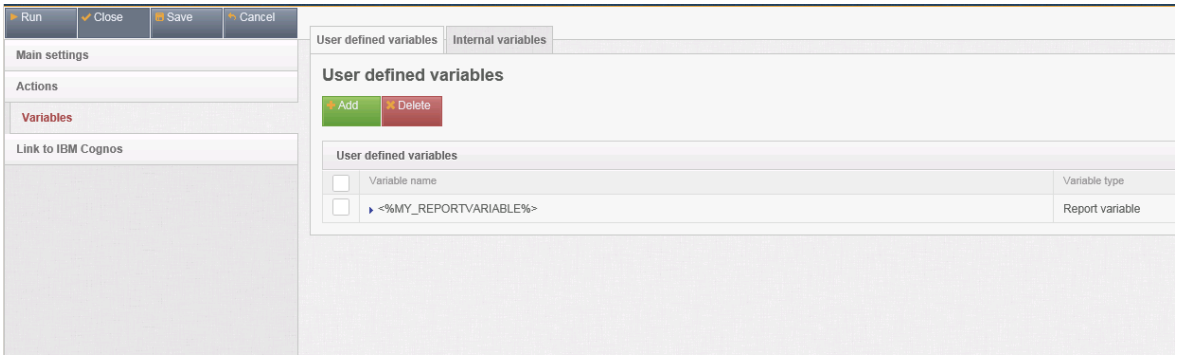
Now the name and output settings:



Change the output format to numeric:



Now the report variable is defined:

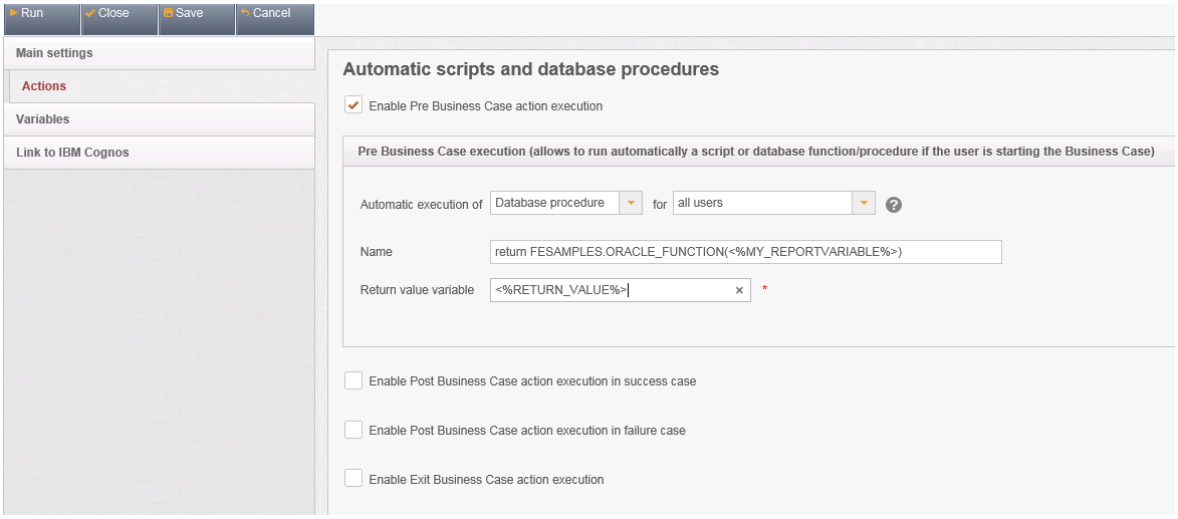


12.1.3 Define the actions

In the „Actions“ tab you can define the business logic that must be called if the Action BC is running.

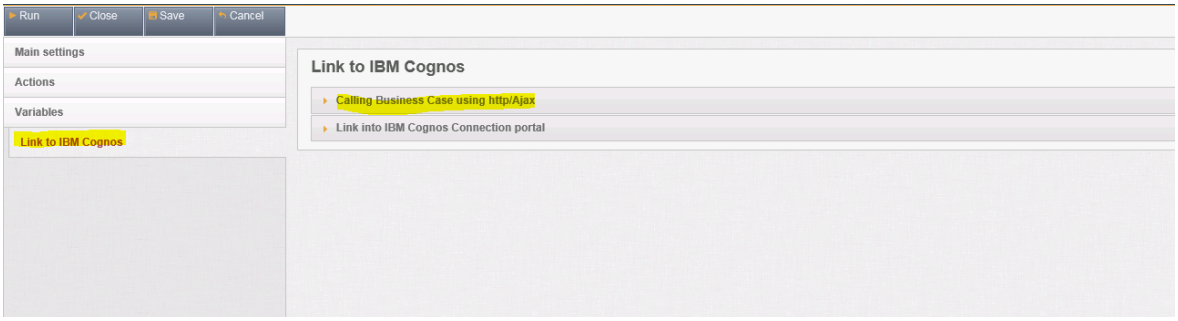
In this example it must call the Oracle function oracle_function with parameter <%MY_REPORTVARIABLE%>.

Please be sure that you use right character case of the function/procedure name.



12.1.4 Creating the Cognos Report Studio report

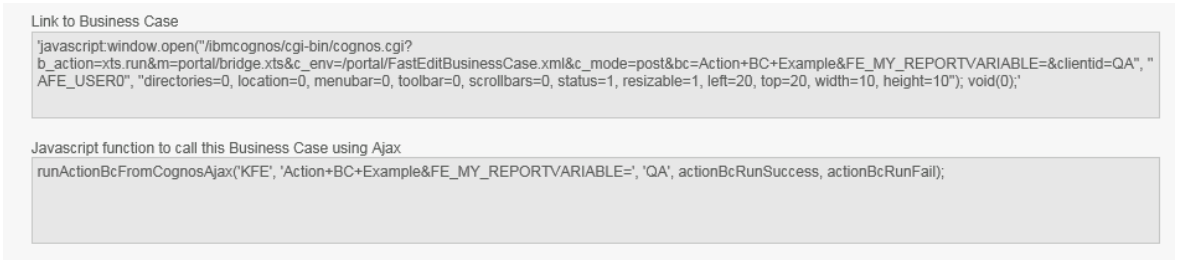
Select tab “Link to IBM Cognos”:



Select area “Calling Business Case using http/Ajax”.

This first expression is used for calling this Business Case using http, e.g. in hyperlink element in the report.

We take the second part later because this is for using AJAX.



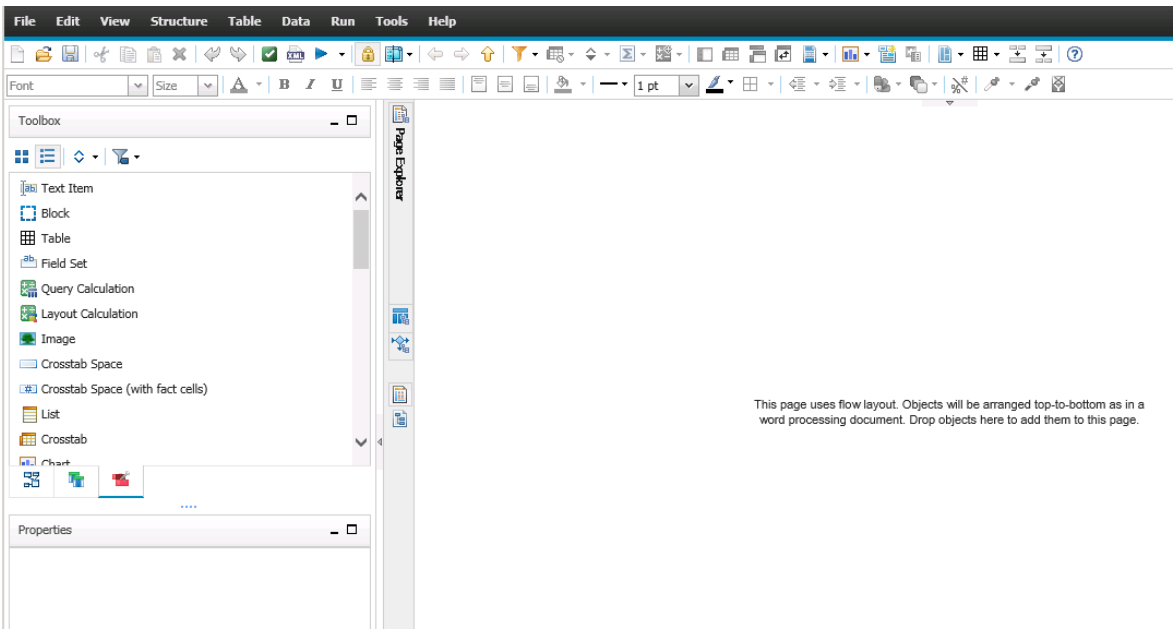
You can see a complete javascript source code example in this part too:

```
Here is example how to call Action Business Case from the IBM Cognos Report using Ajax technology.

//1. we must include javascript libraries into the report (e.g. using "HTML item" component)
<script src="/KFE/javax.faces.resource/jquery/jquery.js?ln=primefaces"></script>
<script src="/KFE/javax.faces.resource/js/actionBcAjaxApi.js?ln=default"></script>

//2. Then we declare two javascript functions that will show Business Case result. One for displaying success case and one for failure case.
// Failure case means e.g. that Business Case is not accessible. Again, we can use "HTML item" component.
<script>
   function actionBcRunSuccess(data){ alert('Action result: '+data.exitValue);}
   function actionBcRunFail(data){ alert('Action failed!');}
</script>

//3. Finally we can assign AFE javascript function "runActionBcFromCognosAjax(AFE_folder, BC_identifier, Client_Identifier, Success_function, Failure_function)" to html link as follow:
<a href="#" onclick="runActionBcFromCognosAjax('KFE', 'actionBc', 'clientOne', actionBcRunSuccess, actionBcRunFail);return false;">Run Action BC</a>

//4. If we need to use report variables for Business Case we can append them to the Business Case identifier parameter using '&' :
<a href="#" onclick="runActionBcFromCognosAjax('KFE', 'actionBc&FE_reportVariable1=10&FE_reportVariable2=20', 'clientOne', actionBcRunSuccess, actionBcRunFail);return false;">Run
Action BC</a>

//5. Here is an example how to call different Action Business Cases when user change state of a checkbox
<input type="checkbox" id="activateActionBc"/>
<script>
   $(function(){
         $('#activateActionBc').click(function(){
            if($(this).is(':checked')){
               //Checkbox has been checked
               runActionBcFromCognosAjax('KFE', 'action_onCheckbox_checked', 'clientOne', actionBcRunSuccess, actionBcRunFail);
            } else {
               //Checkbox has been unchecked
               runActionBcFromCognosAjax('KFE', 'action_onCheckbox_unchecked', 'clientOne', actionBcRunSuccess, actionBcRunFail);
            }
         });
   });
```

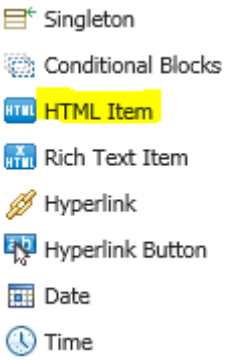
The Cognos report is requiring these javascript source code parts for calling the Action Business Case.
The easiest way is to copy & paste these code parts now.

12.1.5 Creating new Report Studio report

In this example we create a new blank report but it is possible to enhance an existing report too.



Add widget



… to the report and copy the first part into it:

Please copy & paste the source code from the page like described before.

Add additional HTML item:

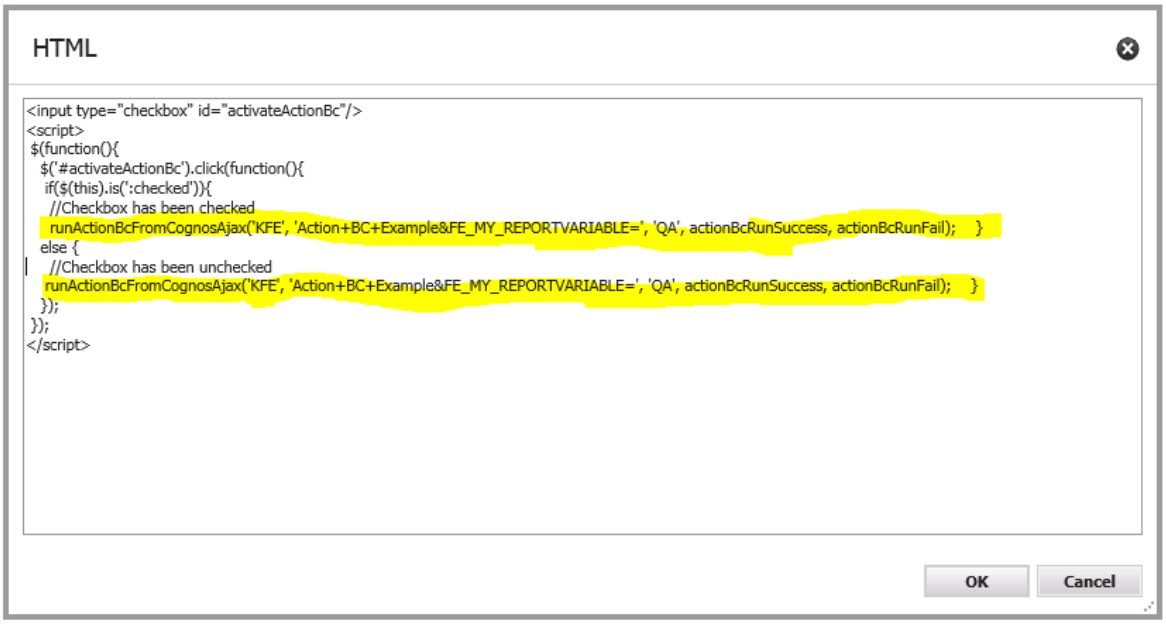
These functions are used for success and failure case.

Add new HTML item that is defining the business logic of the report. In this example we have a checkbox item (that means checked or not checked).

If checked then it is calling automatically an Action Business Case, if unchecked then it is calling another Action Business Case (in our example it is calling the same BC too).

In this example the client name is “QA” and the Action Business Case Id is “Action BC Example”. Additional we are using a report variable.

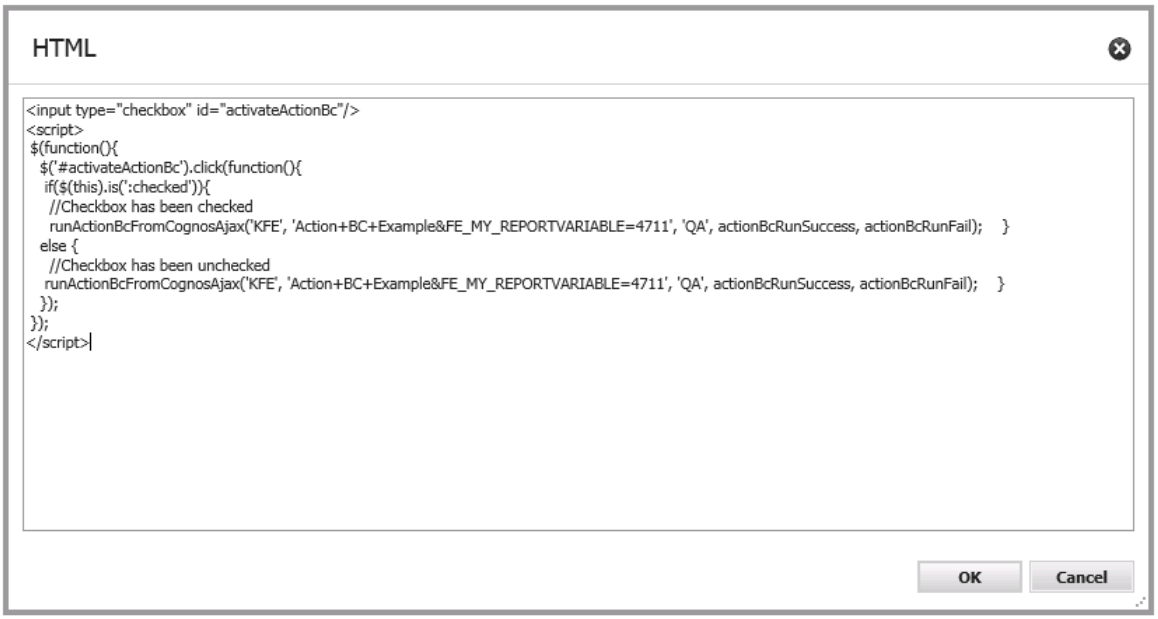
Therefore it is necessary to edit this source code and copy the **generated code for** AJAX (see above) from the Business Case to the report:



You see the text FE_MY_REPORTVARIABLE – this is for delivering the report variable MY_REPORTVARIABLE. It needs a value too.

Please add value 4711 and edit the source code again. Of course in reality the report can compute this value.

The final result is:



If you can the report then you will see just a simple checkbox:

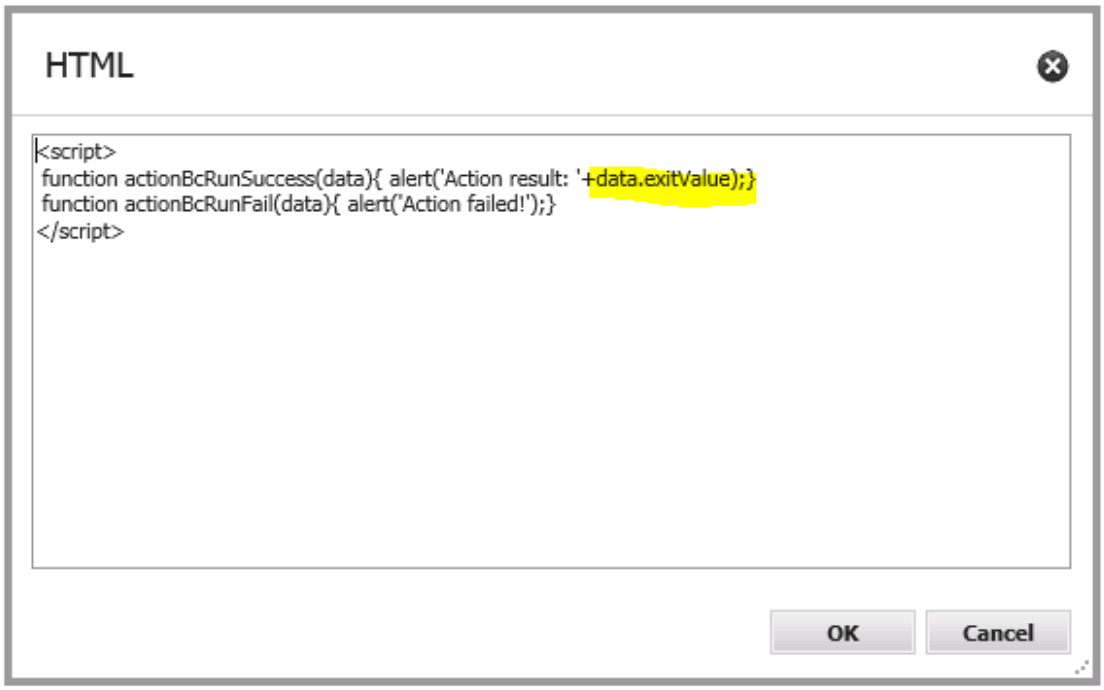
12.1.6 Database function definition

The database function has following definition in this example:

```
create or replace
function  oracle_function(i_value in number) return number AS a number;
begin
                        /* Space for business logic */
return i_value;
end;
/
```

Now the user can run the report and check/uncheck the checkbox.
Every time the function oracle_function including parameter value of the javascript code will be called automatically. The return code of the oracle function will be returned to the report too.

The return code can be read with:

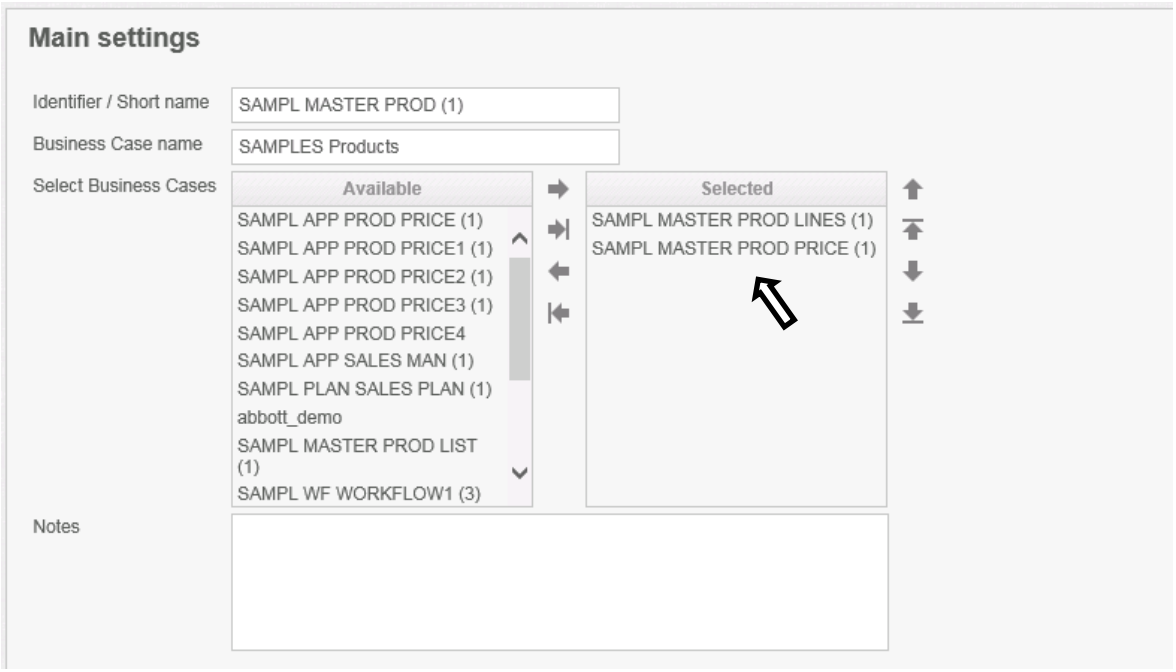


Of course the client settings like business log are executed too.

13 Business Case Sets (Set)

Sets group multiple business cases in a tab view. The business cases can be accessed with tabs and edited comfortable.

13.1 Selection and positioning of business cases in the set (Set)



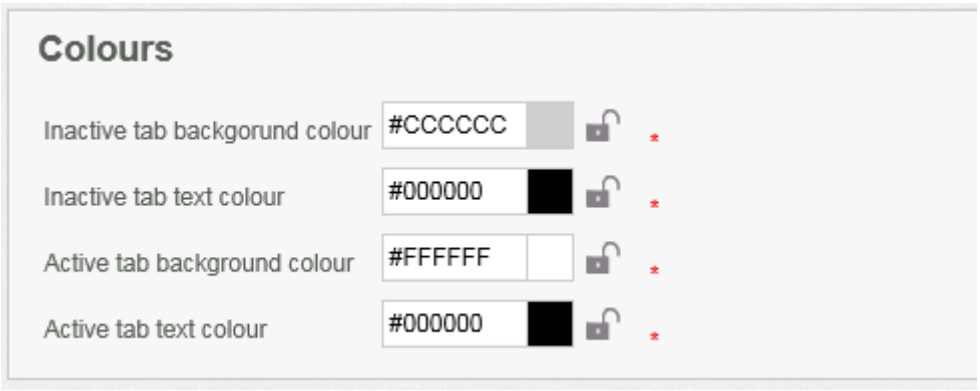
In ‚Available' you find all existing business cases.
By double-clicking or using the arrow keys, these are assigned to the set.

The positioning within the set is also done via arrow keys or the mouse.

By holding down the Ctrl key you select multiple business cases and move it to the desired position.

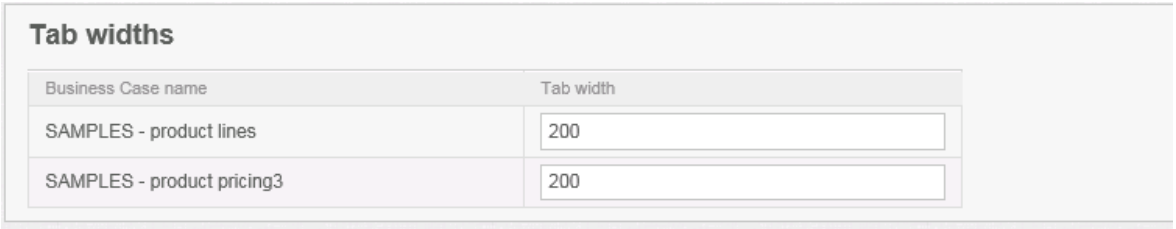
13.2 Colors

In colors you can set the color of the tabs (tab):



13.3 Tab Widths

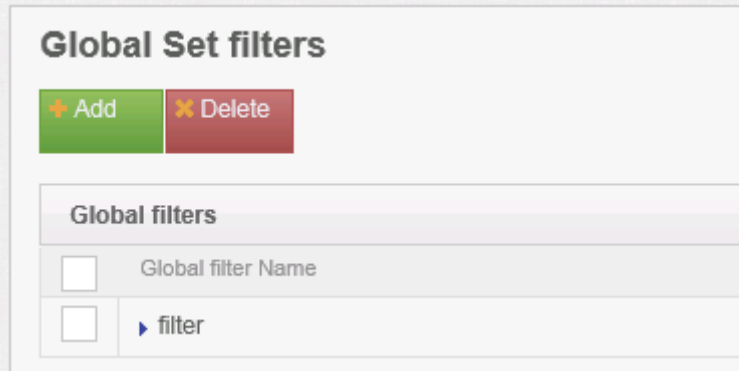
In Table width you define the width of the tabs



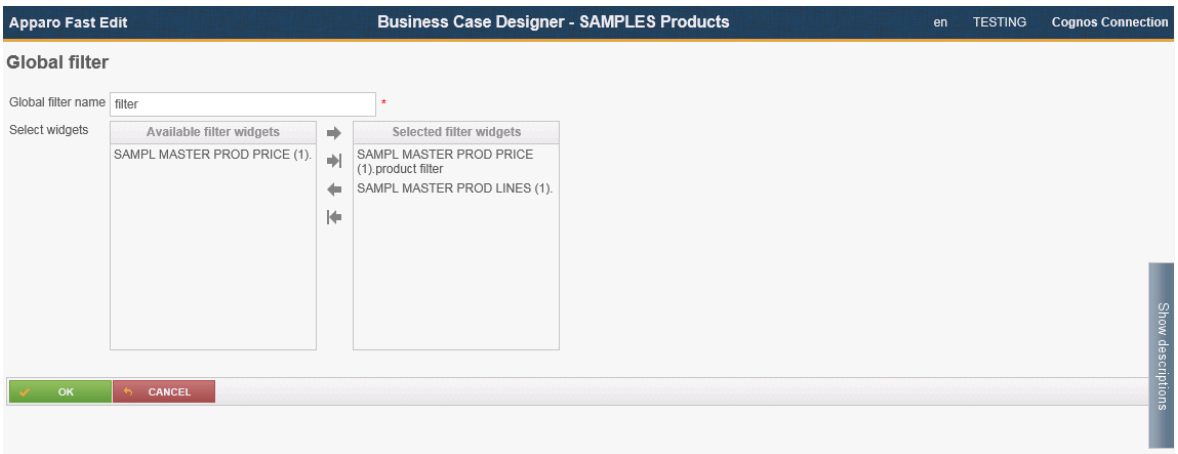
13.4 Global Set filters

A global filter is a connection between different filter widgets of different Business Cases of a Business Case Set. That is helpful if some Business Cases of this Set must be filtered in the same way when if the user is jumping to another Business Case.

Example: All Business Cases must filter for the same product and the user is selecting the product just once. It is possible to use many different global filters parallel, e.g. for product and for product-line.



All existing filter widgets of the Business Cases in the Set are listed here.
To create a global Set filter, move all related filters to ‚Selected filter widgets' and hit OK.

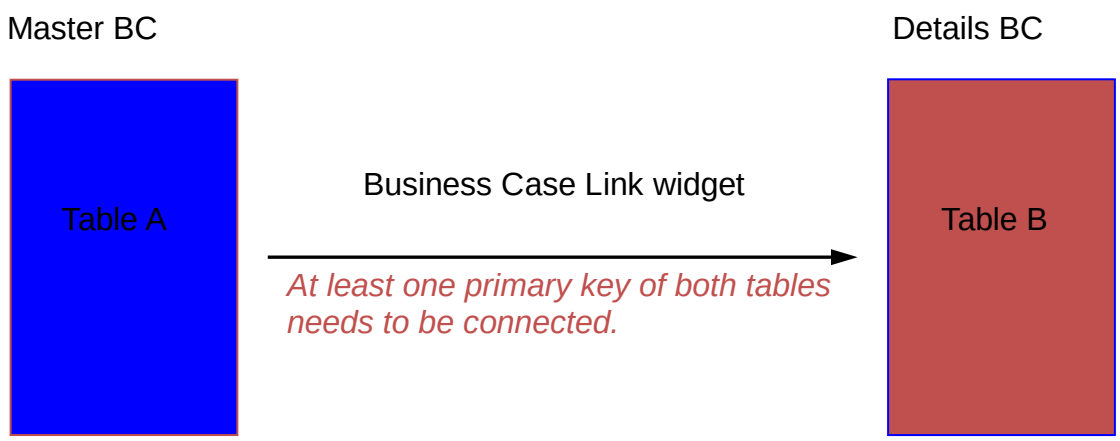


14 Linking BC as Master-Detail connection

In the context of relational databases, a master-detail relationship is the same construction as using a foreign key. (See also the Wikipedia entry http://en.wikipedia.org/wiki/Foreign_key.)

14.1 Master-Detail basics

- Usually, each Business Case refers to one table/view.
- The master-detail-relationship is a way to combine the tables of the Business Cases. It uses the "foreign key" concept of relational databases.
- All user changes in the connected Business Cases are transmitted in one database transaction.



Example:

- The referenced master table includes an invoice header with a unique **InvoiceNumber**.
- The referencing detail table includes each **InvoicePosition** (including the referred *InvoiceNumber* as foreign key).

Invoice (**InvoiceNumber**, Date…)

InvoicePositions (**PositionNumber**, *InvoiceNumber*, …)

The advantage of using a master-detail relationship in Fast Edit as compared to normal database programming is that the logic behind the connection is handled by Fast Edit. You don't have to deal with the construction within the detail table itself, as the mapping is all the information necessary for Fast Edit.

A master table may have many referencing detail tables. However, in the context of Fast Edit, a new Business Case must be created for each master-detail relationship.

The general procedure is as follows:

- The master Business Case needs a **Business Case Link** widget. This widget is the connection to the detail Business Case, by mapping the primary key(s). Note that usually only one of the primary keys needs to be mapped, as this is enough to connect the two Business Cases.
- The detail Business Case needs no special widget. It is only connected to the master Business Case by the mapping.

Once the two Business Cases are connected, entering data in the detail table results in one database transaction for master and detail table.

It is recommended that for the connected column(s), you assign the same column names in both tables. You can only map to widgets with “primary key” tag in the linked Business Case.

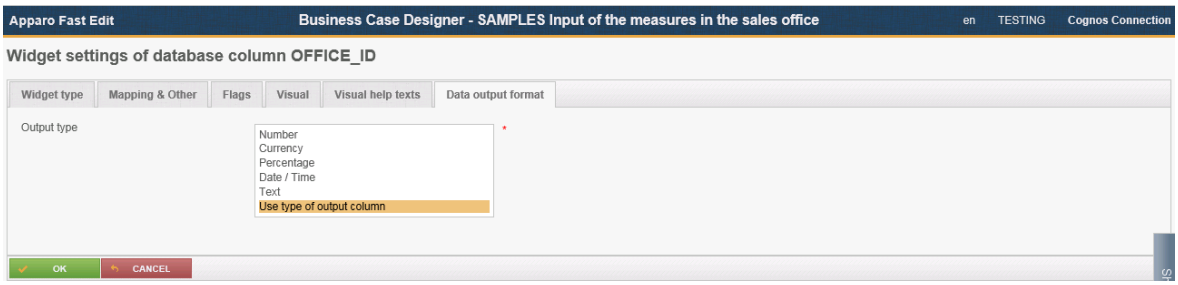
The optical appearance and title text of the Business Case link is defined on the “Visual” register of the widget.

15 Optimizing Business Cases

15.1 Securing data quality

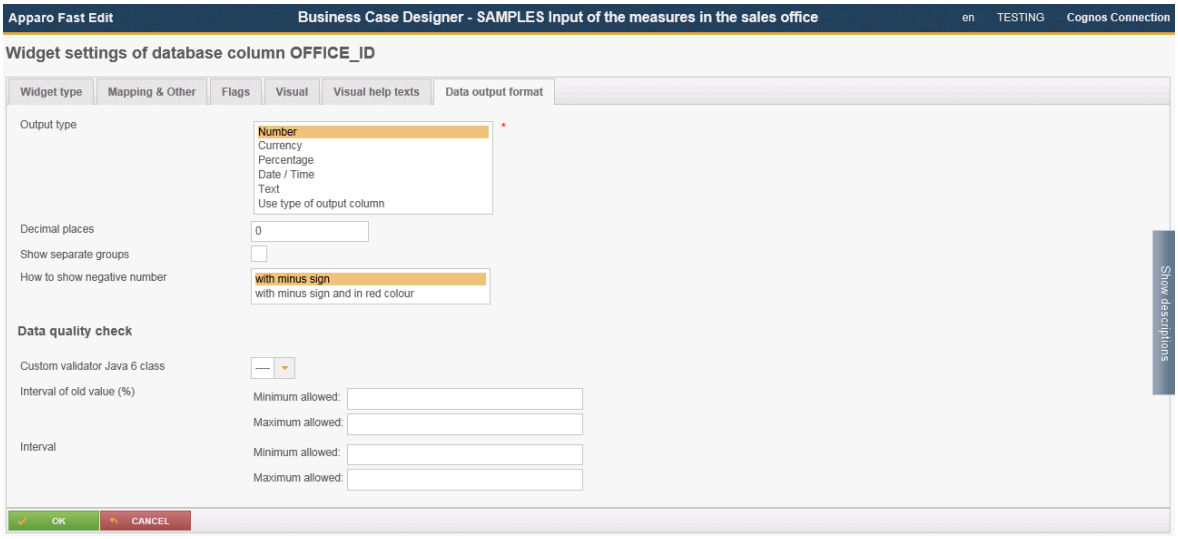
15.1.1 Data output format

Under data output format you will find several options for testing the validity of the data.
The default setting ‚Use type of output column data' and provides no further adjustments.
With this option, the definition in the database of the associated database column determines which data type is used.



Output types:

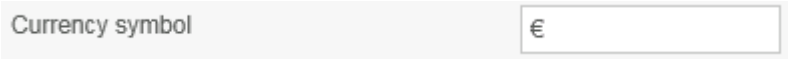
- **Number** - Requires a number
- **Currency** - Shows number values with currency symbol
- **Percentage** - Percentages, e.g. 12,34%
- **Date / Time** - Requires a date / time
- **Text** - To enter text, as a special validation option, there are regular expressions



Decimal places - You can set the number of decimal places displayed
Show separate groups - Serves for better readability of large numbers e.g. 1,000,000,000
How to show negative number - Negative numbers can only be viewed by a minus or colored red

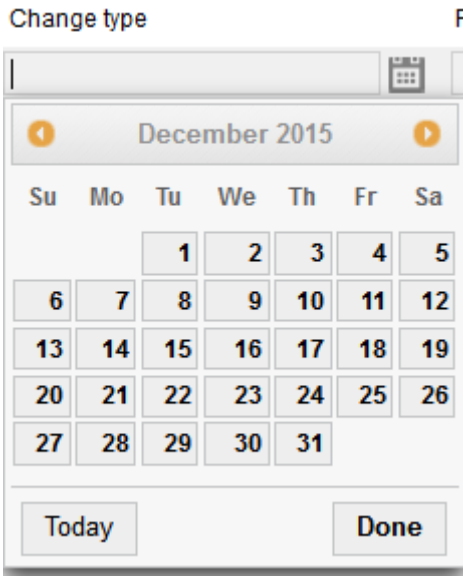
Output type ‚Currency‘

Is identical to the output type ‚number', but contains as a further option the setting for a currency symbol



Output type ‚Date and Time‘

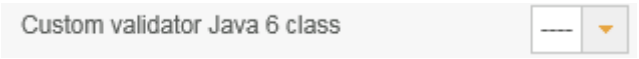
With ‚Show date picker‘ (default) users can easily pick a date



The date pickers prevents entry mistakes

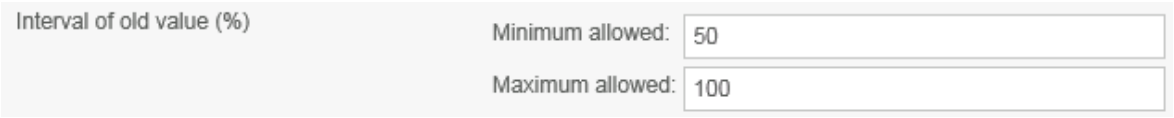
15.1.2 Data Quality check

Custom validator Java 7 class



Optional. A Java 7 class that is testing the input value. The file directory of this file is defined in the Apparo Configuration Manager. This class is called automatically before Apparo Fast Edit is updating or inserting this row.

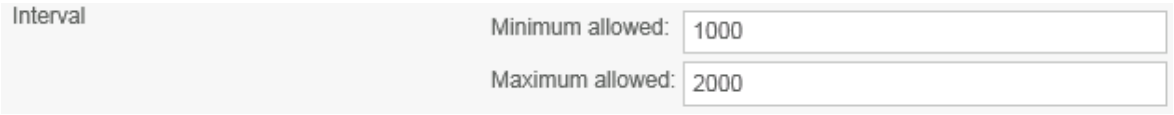
Interval of old value (%)



Hereby you limit the validity of the entered values based on the existing values.

Example: In the widget, the value is 100. In this case, users may only enter values between 50% and 100% of the original value, so values between 50 and 100. Otherwise, the user receives an error message.

Interval



Limits the validity of entries based on an absolute interval. Permissible are values only from 1000 to 2000. Interval limits can be set dynamically with variables.

Regular Expression (Only for type ‚Text')

Using a regular expression is helpful to define more complex input rules. For example you can define that the first character must be an 'A' and then just numbers are allowed. Click the '?' icon to see the detail instructions.

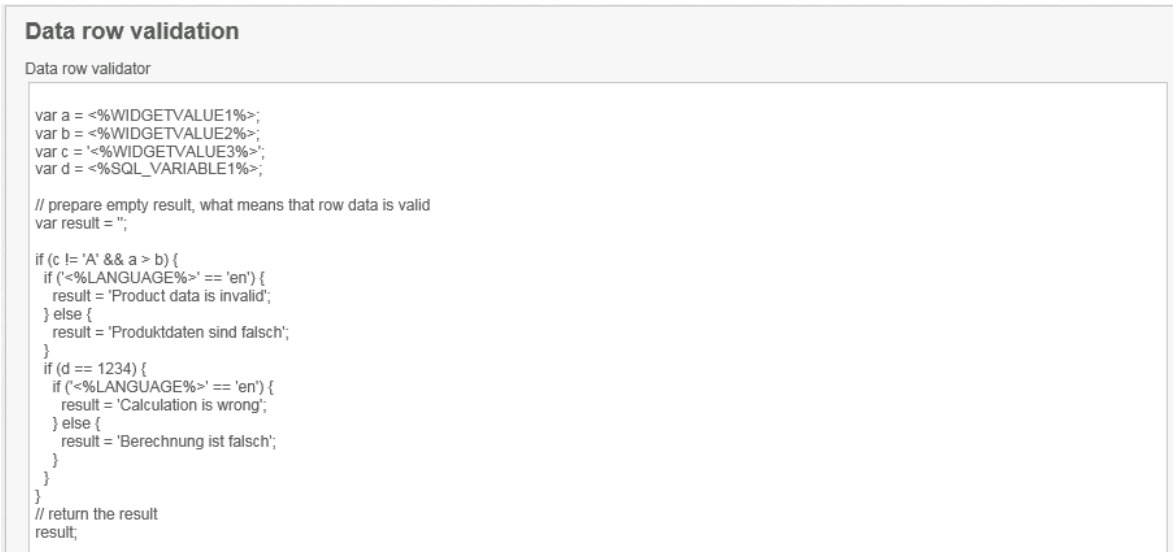
Characters		
Character	**Description**	**Example**
Any character except `[\^$.|?*+()`	All characters except the listed special characters match a single instance of themselves.	`a` matches a
`\` (backslash) followed by any of `[\^$.|?*+()`	A backslash escapes special characters to suppress their special meaning.	`\+` matches +
`\xFF` where FF are 2 hexadecimal digits	Matches the character with the specified ASCII/ANSI value, which depends on the code page used. Can be used in character classes.	`\xA9` matches © when using the Latin-1 code page.
`\n` `\r` and `\t`	Match an LF character, CR character and a tab character respectively. Can be	`\r\n` matches a

15.1.3 Data row validation

Enables validation of input when inserting or updating data

You can:

- Access all widget content via widget reference variables
- Use SQL variables
- Define own error texts, which are output automatically



Technical:

You define a JavaScript routine that can access widget reference variables or SQL variables.
An example can be obtained by clicking the question mark icon.
If the data row contains an error, an appropriate error message can be defined and the user is seeing exactly this error message.

15.2 Tracking of data changes

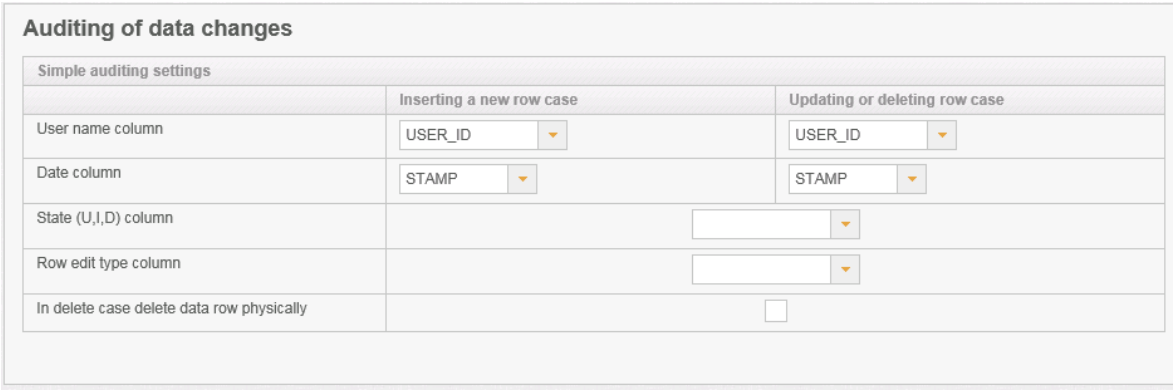
15.2.1 Auditing of data changes

The audit function you can use to document all data changes.

There are 2 different types of audit:

Simple Auditing

To save the audit information into the target table.



It is possible to save the user name, date and time and the type of change for each row in the target table.

There are 2 different types of changes possible:

- The user adds a new row
- The user deletes or modifies a row.

The following states are possible: U = Update, I = Insert (paste), D = Delete (Delete).

Options

User name column
Stores the name of the user

Date column
Date column for storing update or insert date and time

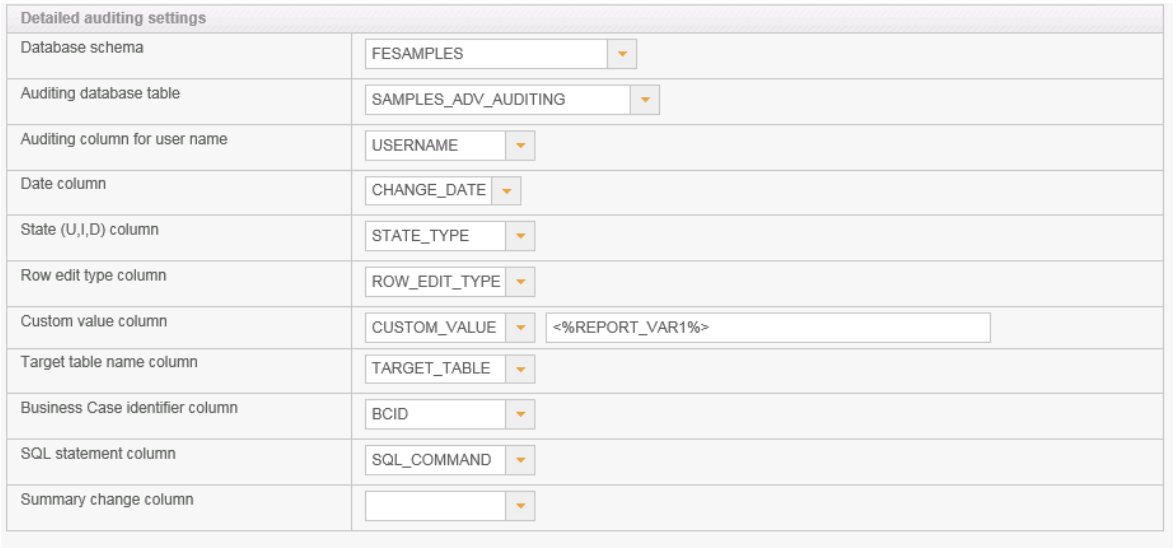
State (U, I, D) column
The database column in that the state(U=Update,I=Insert,D=Delete) will be stored.

Row edit type column
In this auditing column the row edit type can be stored. The row edit type (type of string) is describing the way of editing.

In delete case delete data row physically
Physically delete row(s) with 'D' flag from table. If disabled then all deleted rows get the state 'D' and are not physically deleted.

Detailed Auditing

Storing detailed audit information in a separate audit database table helpful if every small change (eg a column) with name, timestamp, etc. should be documented.



Options

Database schema
The database schema in that the auditing table is already stored.

Auditing database table
The database table for the auditing data.

Auditing column for user name
The database column of the auditing table in that the user name who has changed data will be stored.

Date column
The auditing column for storing the date/time of the data change.

State (U, I, D) column
The auditing table column in that the state must be stored (U=update, I=insert, D=delete).

Row edit type column
In this auditing column the row edit type can be stored.

Custom value column
In this auditing column a custom value with variables can be stored that is stored in the auditing table only.

Target table name column
In this auditing column the name of the target table of this Business Case can be stored.

Business Case identifier column
In this auditing column the Business Case ID (short name) can be stored.

SQL statement column
In this auditing column the SQL statement can be stored. Be sure that this column can store a long text.

Summary change column
This text contains all data changes in one string like oldValue=1, newValue=2,..The column names are defined in the widget list beneath.

15.2.2 Data History

Apparo Fast Edit can historicize a record (slowly changing dimension type 1 and 2).
Information about "**Slowly changing dimension**", see:

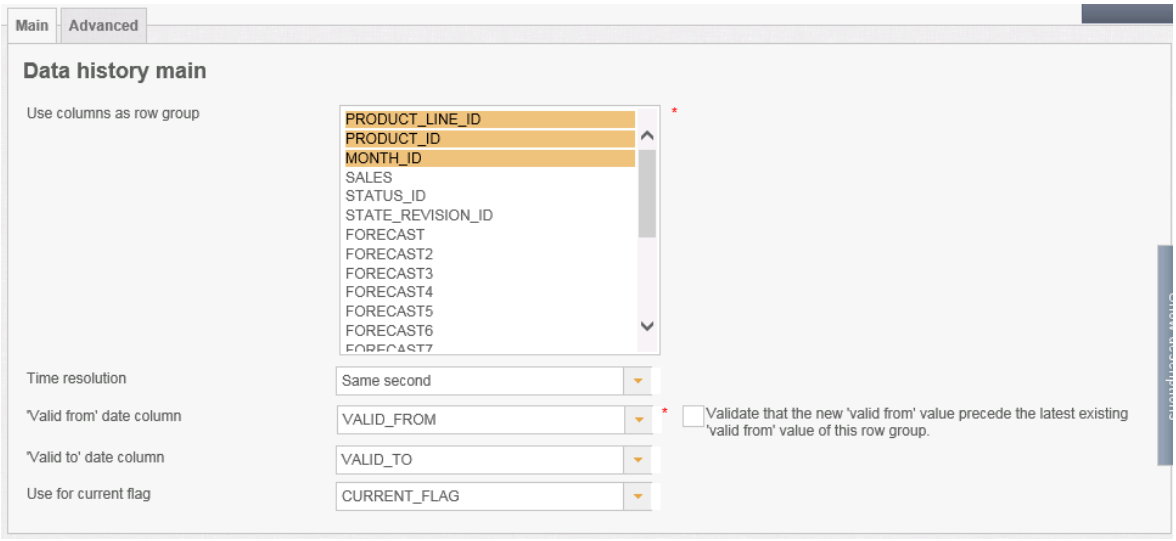
http://en.wikipedia.org/wiki/Slowly_Changing_Dimensions

Note: For a historicizing the database must be able to perform "save points".

Since the Sybase / Informix / Teradata JDBC driver does not support this feature, the historicization of records within a Sybase or Informix or Teradata database is not possible.

This function automatically copies data rows when they are modified.
It automatically manages the current record and makes it possible to either overwrite or historicize records within time frame definitions.

The user usually sees only the current line and not the data changes or deletions (if only virtually), the new rows are simply copies of the original lines.



The Business Case is managing automatically 'date from', 'date to' and "current" columns of the target table.
With these date columns it is possible to see the time dependencies of the changes.

Background

Apparo Fast Edit is combining data rows together to a 'row group'. A 'row group' are data rows that are storing detail information about an entity, for example a "product entity" has many different prices over the time.

Please don't use widgets (columns) for the history feature that contain read/write expressions.

Time resolution

If there are 2 or more data changes into a row in the same time frame then Apparo Fast Edit will update the row only. If the next change is outside of the time frame then Apparo Fast Edit is copying automatically this row and changing the 'date from' and 'date to' columns automatically too.

'Valid from' date column

The 'valid from' database column of the target table is used for storing the begin of the time frame for a row.

Validate that the new 'valid from' value precede the latest existing 'valid from' value of this row group.

Useful for manually entered valid from values
HINT: this column must be a part of the primary key

'Valid to' date column

The 'valid to' database column of the target table is used for storing the end of the time frame for a row. This setting is optional. It is automatically managed by the Business Case.

Use for current flag

The 'current' database column of the target table is used for marking the current row of a group. This setting is optional. It is automatically managed by the Business Case.

Advanced settings for the history feature:

Date for infinity

The infinity date is used in the 'date to' column for the current data row.
The current row is usually valid to this date.

Value for ‚is current' lines

Value for current line (for example, 1)
Value of non-current line (for example, 0)

16 Adding a Business Case into a Cognos report

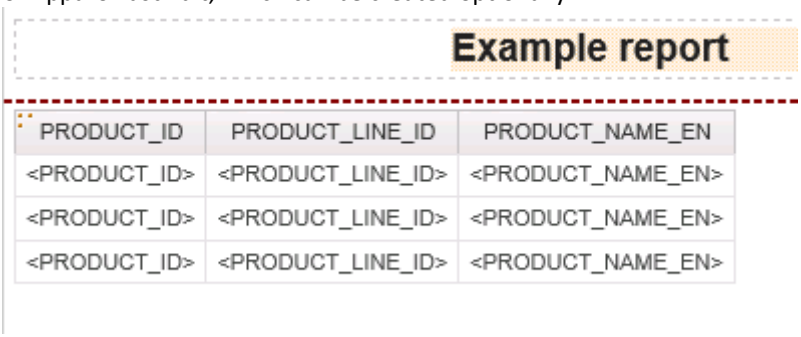
In this program section, you can enrich existing IBM Cognos reports with a hyperlink for a business case.

Each list or cross table in a report can be extended with a hyperlink, with which the user can open a business case from this report.

Business Cases can be called from outside of lists / cross tables too.

Example:

You have developed the following report with Report Studio. The table SAMPLE_PRODUCT is a sample table of Apparo Fast Edit, which can be created optionally.



The data rows are dependent on the columns PRODUCT_ID and PRODUCT_LINE_ID.

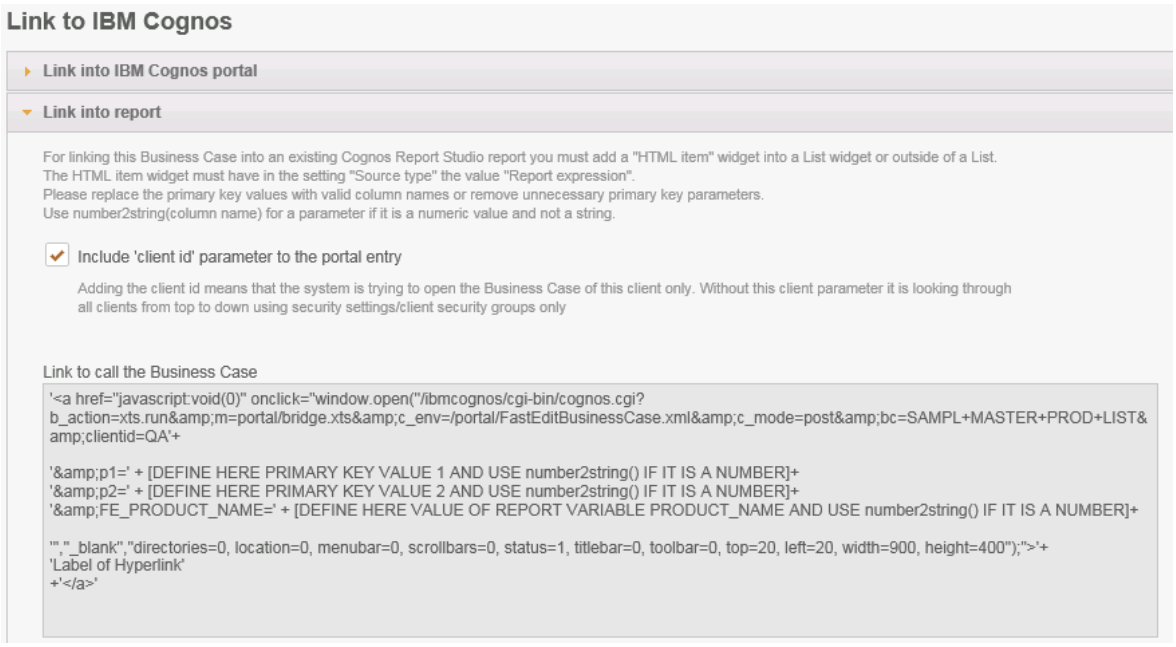
Therefore the business case also has a primary key that consists of 2 columns:
PRODUCT_ID and PRODUCT_LINE_ID.

Output of the report:

PRODUCT_ID	PRODUCT_LINE_ID	PRODUCT_NAME_EN
350	6	Bino
440	2	T-Shirt Moscow
480	6	Bino
490	2	T-Shirt Moscow
500	1	test
510	4	Alon
520	4	Gilbert
390	1	test
400	4	Alon
410	4	Gilbert
420	4	Luxor
430	4	Madox
450	3	Oxford L
460	3	New Yorker
470	3	Nightblue
320	2	T-Shirt Vienna
330	5	Lueneburgjjj

The sample business case uses as primary key also PRODUCT_ID and PRODUCT_LINE_ID:

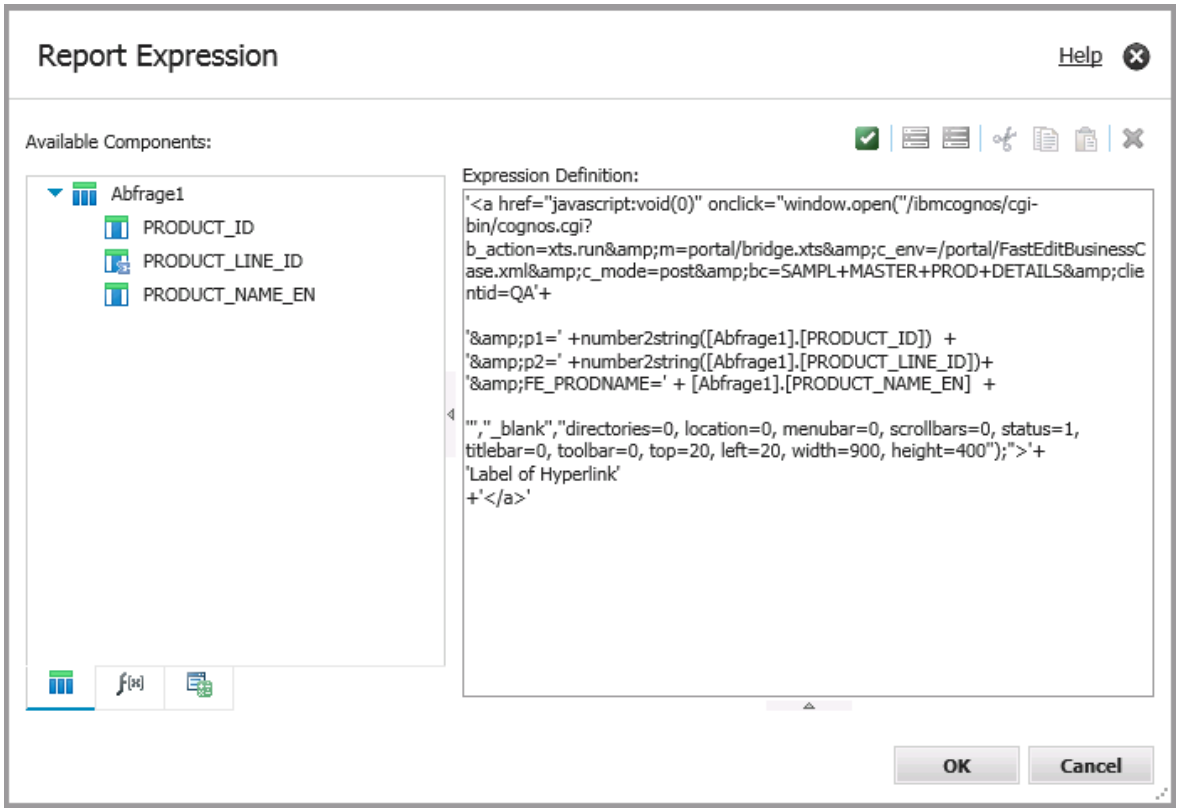
Select the Tab ‚**Link to IBM Cognos**' and click on ‚Link into report':



Copy the complete HTML expression and create in Report Studio a new **HTML item** that should be part of the list.

PRODUCT_ID	PRODUCT_LINE_ID	PRODUCT_NAME_EN	HTML-item
<PRODUCT_ID>	<PRODUCT_LINE_ID>	<PRODUCT_NAME_EN>	< HTML-item >
<PRODUCT_ID>	<PRODUCT_LINE_ID>	<PRODUCT_NAME_EN>	< HTML-item >
<PRODUCT_ID>	<PRODUCT_LINE_ID>	<PRODUCT_NAME_EN>	< HTML-item >

Change the source type to "Report Expression" and paste the HTML expression:



Now change the value for the primary key 1 to:

number2string([Abfrage1].[PRODUCT_ID])

and primary key 2 to:

number2string([Abfrage1].[PRODUCT_LINE_ID])

The report variable FE_PRODNAME gets the content of the column PRODUCT_NAME_EN.

Result:

'<a href=''javascript:void(0)'' onclick=''window.open(''/ibmcognos/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/bridge.xts&c_env=/portal/FastEditBusinessCase.xml&c_mode=post&bc=SAMPL+MASTER+PROD+DETAILS&clientid=QA'+

'&p1=' +number2string([Abfrage1].[PRODUCT_ID]) +
'&p2=' +number2string([Abfrage1].[PRODUCT_LINE_ID])+
'&FE_PRODNAME=' + [Abfrage1].[PRODUCT_NAME_EN] +

''',''_blank'',''directories=0, location=0, menubar=0, scrollbars=0, status=1, titlebar=0, toolbar=0, top=20, left=20, width=900, height=400'');">'+
'Label of Hyperlink'
+''

When starting the report now, you get the result:

PRODUCT_ID	PRODUCT_LINE_ID	PRODUCT_NAME_EN	HTML-Element
350	6	Bino	Label of Hyperlink
440	2	T-Shirt Moscow	Label of Hyperlink
480	6	Bino	Label of Hyperlink
490	2	T-Shirt Moscow	Label of Hyperlink
500	1	test	Label of Hyperlink
510	4	Alon	Label of Hyperlink
520	4	Gilbert	Label of Hyperlink
390	1	test	Label of Hyperlink
400	4	Alon	Label of Hyperlink
410	4	Gilbert	Label of Hyperlink
420	4	Luxor	Label of Hyperlink
430	4	Madox	Label of Hyperlink
450	3	Oxford L	Label of Hyperlink

With click on the hyperlink opens a new window with the business case, which uses the primary key values and the report variable.

An own primary key combination is used for each row of the report.
The Business Case uses these values and will open a new window:

Apparo Fast Edit

Produktdetails

Product id	340,00
Product line id	1,00
Product name en	V-Shirt
Product colour	black
Product size	L
Product model	E3
Product manuf	Adidas
Product descr	Description
Product filename	E3.png
Product start date	25.02.2014
Product notes manager	
Product notes worker	
Product notes customer	
Product name de	T-Shirt V-Ausschnitt

17 Calling external scripts / procedures / functions

17.1 Own action buttons

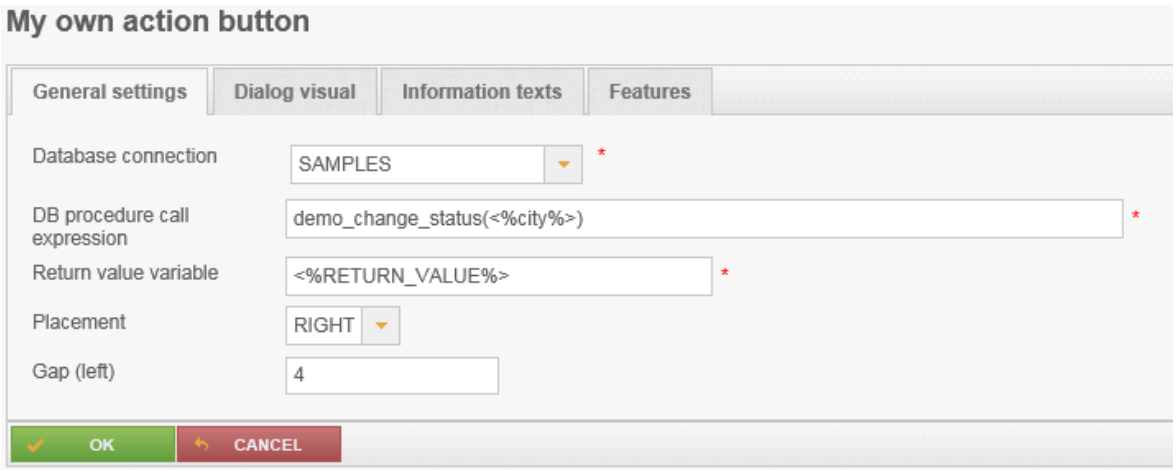
Action buttons can call executables files or scripts, database procedures, URLs and eMail Business Cases.

It is possible to specify different behavior patterns. For example, single call or a call for each selected row of data, etc.

17.2 Executable button

With Apparo Fast Edit you have several options for further processing of the data. With "Executable Button" you can add a button for processing (like.bat, .cmd, .sh, .sql). All files that are to be called up must be stored in the script file directory which was defined in the Apparo Configuration Manager.
Using the Apparo Configuration Manager it is possible to change the used file directory.

17.2.1 General Settings



Executable filename
Here you can select the batch processing file or sql file, which will be executed by this button.

Arguments
Optional you can use arguments (variables are allowed too) that will be delivered to the script or database procedure.

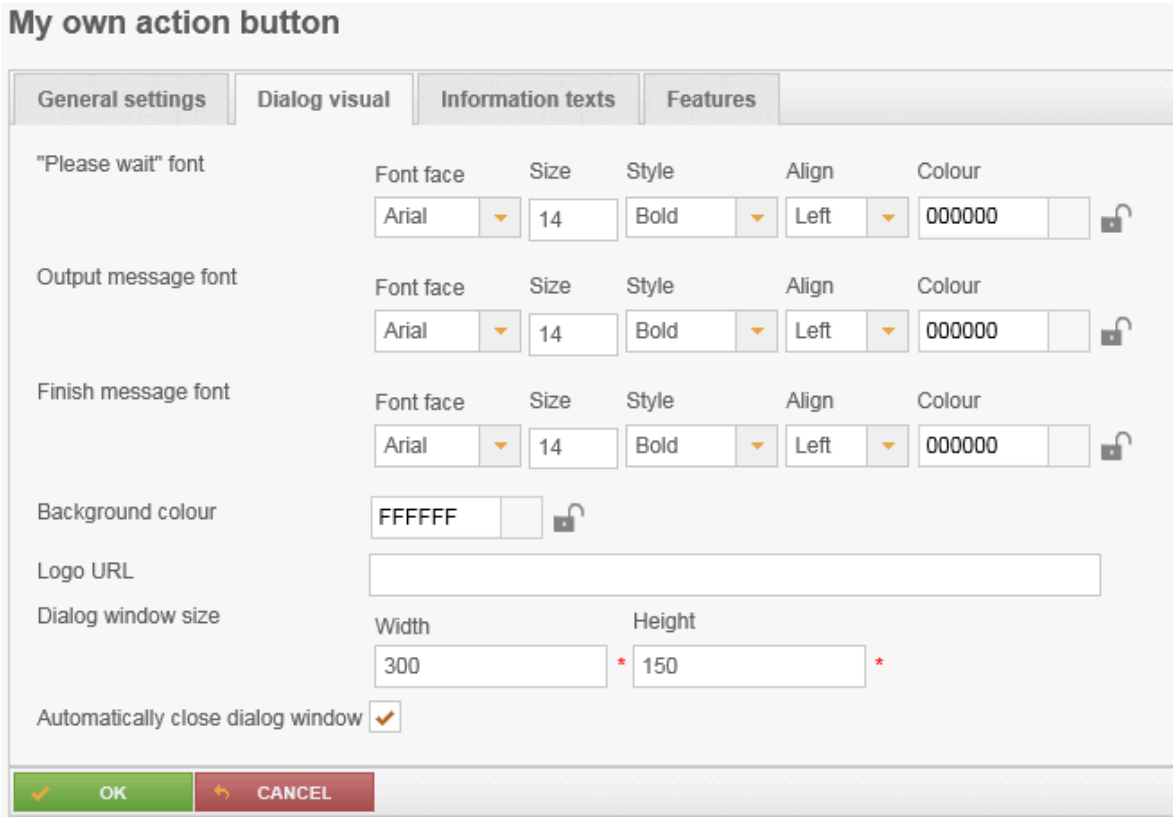
Return value variable
In this variable is the return value of the function/script stored.

Placement
Arrangement of buttons on the screen.

Gap
Space to the next button in pixel

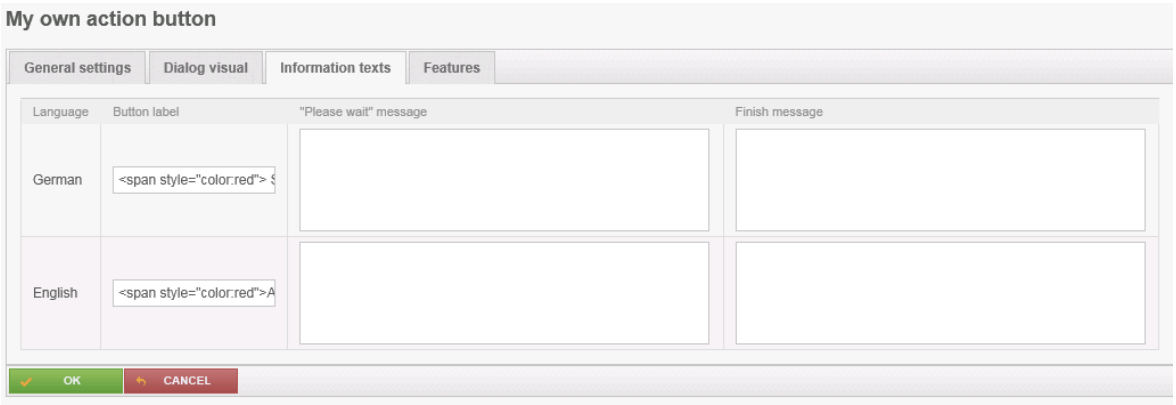
17.2.2 Dialog visual

Here you will find settings for the layout and behavior of the message window.



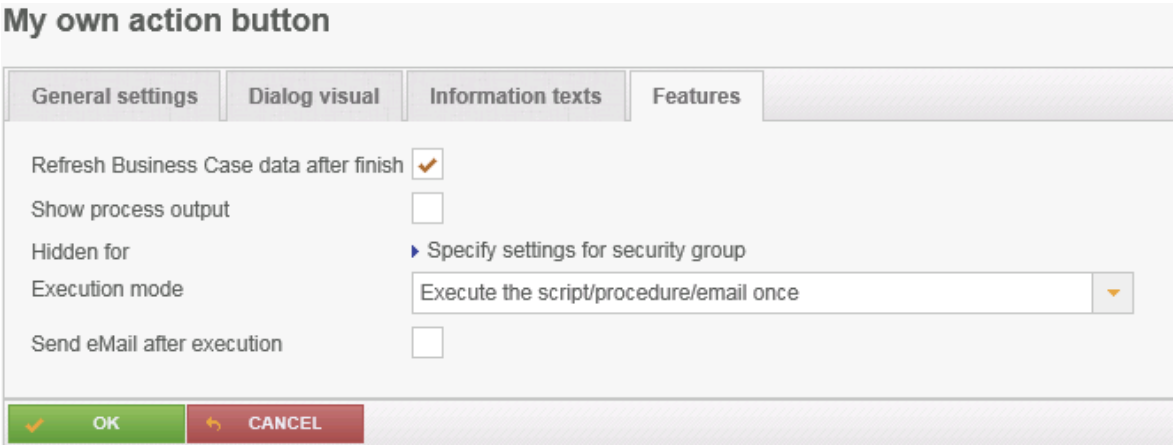
17.2.3 Information texts

At this point you can define a label for your button and individual texts for waiting and finishing.



17.2.4 Features

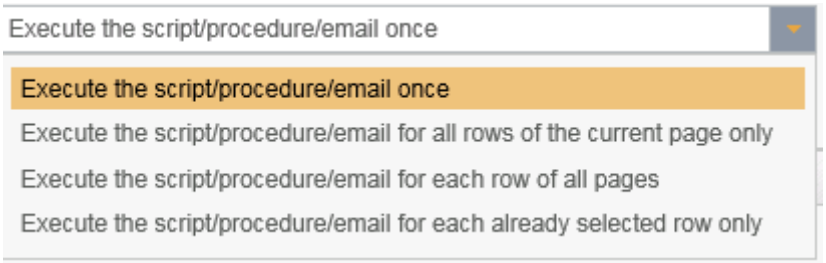
Here you can define the behavior of the button.



Refresh Business Case data after finish
If enabled, the Business Case is reloading the database data again after execution of the script/procedure. This is helpful if your script/procedure is changing data that must be displayed in the Business Case too.

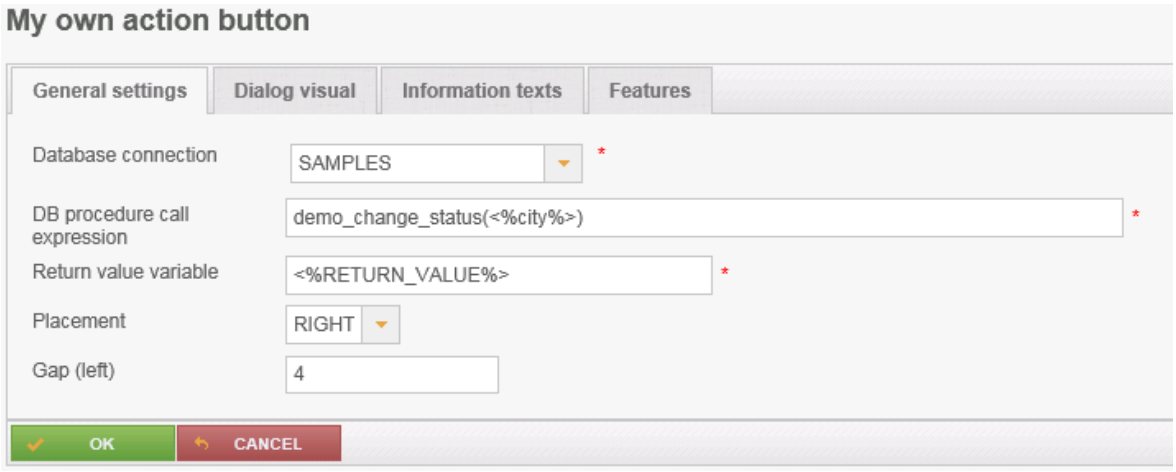
Show process output
If enabled, the user will see the script output in a small window.

Execution mode
Execute the script/procedure/email once
Here you can define the exact behavior of this button. Your script/procedure can be called for each row, selected row or just once.



Send eMail after execution
After execution of a script or database procedure it is possible to send automatically an eMail. This eMail Business Case has access to all widget values of this Business Case.
That means that the eMail body can contain values of this current Business Case.

17.3 Database procedure button



Database connection
Here you can select the database connection on which the button will be proceeded.

DB procedure call expression
How to call a database function or procedure:

[Calling convention] procedure/function_name (argument1, argument2, ..., argumentN)

Please use same character cases for schema and procedure/function like defined in your database.

If the database connection of this procedure/function is same as the one for Business Case than the procedure/function is executed within the same database transaction.

The procedure must not commit or rollback the existing transaction, but is allowed to start its own inner (named) transaction (if supported by database) or use savepoint's.

For character or string argument use ' character to enclose argument.
Use at least one space between [Calling convention] and procedure name.

Your parameters may contain Apparo Fast Edit variables, for example: <%USER_NAME%>
Do not enclose Apparo Fast Edit variables with apostrophes or quotes.

Oracle or IBM DB2 database:
return - For calling a stored function that returns a value

MS SQL Server database:
Calling functions on SQL Server is not supported. It is possible to have a return value from procedure but [Calling convention] must be empty in this case.
Please use in your SQL Server procedure at the begin "SET NOCOUNT ON;" Then it is possible to use SQL commands in your procedure without having impact to the return value.

Sybase database:
select - For calling a stored function that returns a value

Teradata database:
return macro - For calling a Teradata macro that returns a value
macro - For calling Teradata macro that does not return a value
return - For calling a stored functions that returns a value

Return value variable
In this variable is the return of the function/script stored.

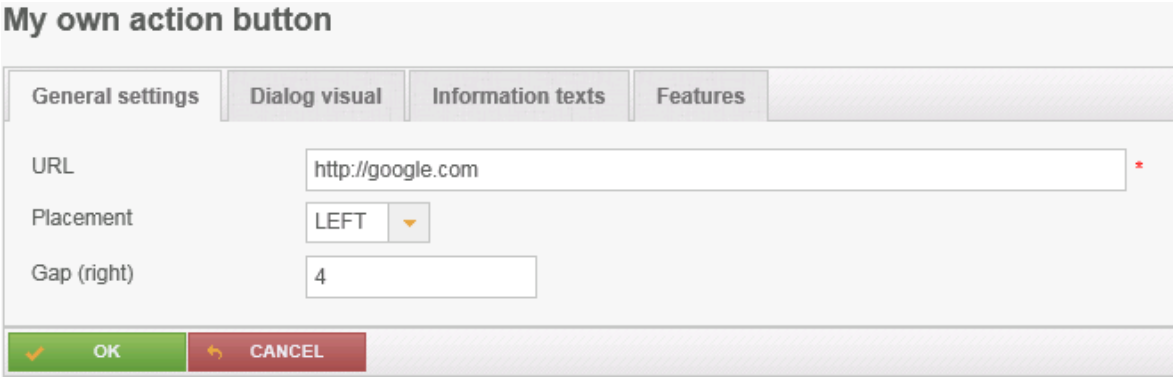
Placement
Here you can decide about the arrangement of buttons on the screen.

Gap
Space to the next button in pixel

17.4 URL buttons

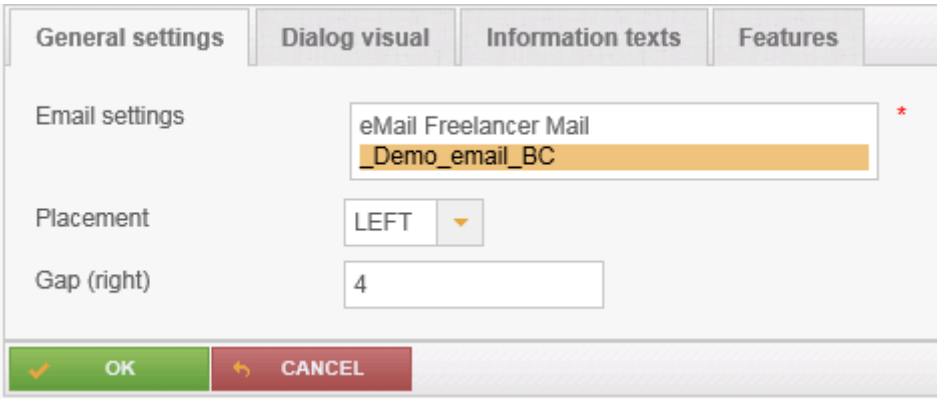
With these buttons you can call any URL:

- Web Sites & Portals
- Reports & Dashboards
- Business Cases



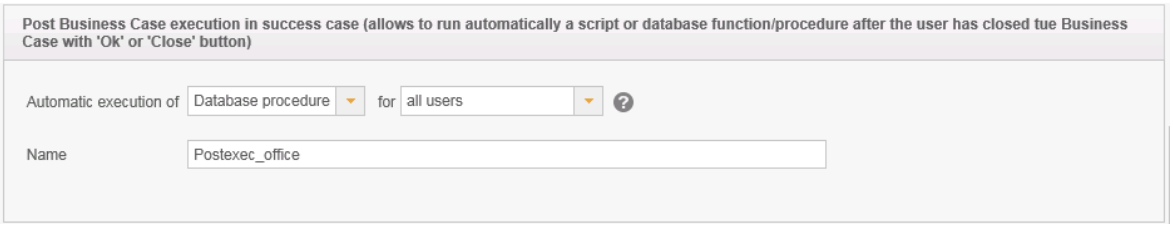
17.5 E-mail Buttons

With these buttons you can send e-mails.



The settings for the e-mail you make in the selected e-mail business case.
All variables of the calling business case can be used.

17.6 Pre/Post execution



With Pre/Post-Execution it is possible to run automatically a script or a database procedure/function at certain moments.

It is possible to start a shell-script, database function/procedure or SQL-script before Business Case/server side file import starts, and/or after it is finished before forced Excel row import starts, and/or after it is finished after the user has inserted or updated data row

This behavior can be defined for all or for users that are members of a specified group.
If the current user is member of a specified group then just the shell-script, database function/procedure, SQL-script of this group is executed only.

In all other cases the default script/function/procedure is called only.
For now Apparo Fast Edit is supporting Oracle, Microsoft SQL Server, IBM DB/2, Sybase ASE/IQ (chained mode only) and Teradata databases.

A SQL-script is a text file with file name extension .sql that contains SQL-statements like INSERT, UPDATE, DELETE.
The commands are executed using the same database session like the Business Case and are separated by a semicolon.

Pre Business Case execution
(allows to run automatically a script or database function/procedure if the user is starting the Business Case)

Post Business Case execution in success case
(allows to run automatically a script or database function/procedure after the user has closed tue Business Case with 'Ok' or 'Close' button)

Post Business Case execution in failure case
(allows to run automatically a script or database function/procedure after the user has closed the Business Case with ‚CANCEL' or ‚X' button)
Fast Edit is checking the browser state by default every 180 seconds, it may take up to 3 minutes after closing the BC with ‚X' before the script/procedure is executed.

Post insert execution

(allows to run automatically a script or database function/procedure after a new row was inserted)

This insert can be done:

- From inserting area (Table Business Case)
- From insert mode (Single Business Case)
- From Excel file import
- From Excel row import using copy and paste
- From automatic server import
- From automatic import of email data-file attachments
- By copying row/s in the same window

The procedure or script will **NOT be executed after modifying a row in edit area.**

Post update execution

(allows to run automatically a script or database function/procedure after a row was updated)

This update can be done:

- From inserting area (Table Business Case)
- From insert mode (Single Business Case)
- From Excel file import
- From Excel row import using copy and paste
- From automatic server import
- From automatic import of email data-file attachments
- By copying row/s in the same window
- After modifying a row in edit area

Optionally, a query window to activate that appears when the user updates a row of data from the input area.

Post Excel import execution

(allows to run automatically a script or database function/procedure after any kind of Excel import has finished)

All Apparo Fast Edit variables can be used here, including:

- <%IMPORTED_ROWS%> count of imported rows
- <%INSERTED_ROWS%> count of inserted rows
- <%UPDATED_ROWS%> count of updated rows
- <%IMPORTED_FILE_NAME%> file name of the imported file (if applicable)
- <%EXCEL_IMPORT_ID%> An unique ID of type string

18 Filter data output

The function filter data output represents the global filter of the business case.
Additional filters can be added through filter widgets.

You can create different filters for different security groups. If a user is a member of the security group, only the security groups based filter is used instead of the global BC filter.

Variables are allowed.

Syntax

In the filter, you can use native SQL. It represents the Where clause of the SQL query and filters the output of the target table.

Example

SELECT * FROM target table WHERE **[=data output filter]**

18.1 Filter widgets

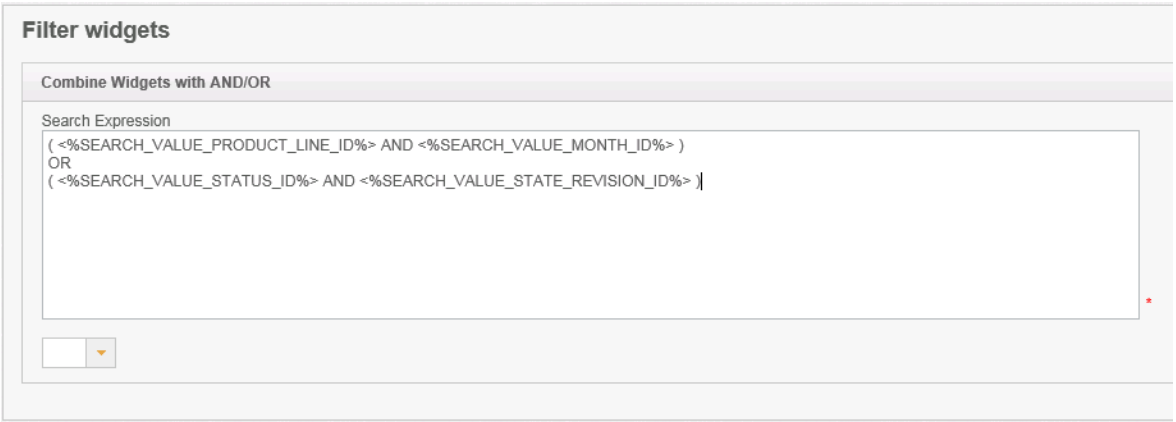
Contains the optical settings for the additional filter page and the settings for combining filter widgets

18.2 Filtering prompt page settings

You can add a filter page that is displayed before the user can see the data page for editing, inserting etc. The filter page will be used automatically if you add a filtering widget that is placed in the filter page. On this page you can define the title, description and other optical definitions of this filter page.

18.3 Combine Widgets with AND/OR

The function extends the filtering possibilities with filter widgets.



Standard type of searching is combining all used searching widgets with logical 'AND' operator.
If you want to combine them differently then you must use 'Advanced Type Of Searching'.In 'Search Expression' you can define your own combination of searching widgets.
You can combine them with operators 'AND' and 'OR' and you can also use brackets '(' and ')'

Each searching widget must be used exacly once in the search expression.

The following examples contain combinations of these four filters widgets

Examples

One of the set criteria is met:
<%SEARCH_VALUE_PRODUCT_ID%> or <%SEARCH_VALUE_PRODUCT_COLOUR%> or <%SEARCH_VALUE_PRODUCT_SIZE%> or <%SEARCH_VALUE_PRODUCT_LINE_ID%>

The product line and ONE of the other filter criteria is met:
<%SEARCH_VALUE_PRODUCT_LINE_ID%> and (<%SEARCH_VALUE_PRODUCT_ID%> or <%SEARCH_VALUE_PRODUCT_COLOUR%> or <%SEARCH_VALUE_PRODUCT_SIZE%>)

The product line or the combination of ALL other filter criteria are met:
<%SEARCH_VALUE_PRODUCT_LINE_ID%> or (<%SEARCH_VALUE_PRODUCT_ID%> and <%SEARCH_VALUE_PRODUCT_COLOUR%> and <%SEARCH_VALUE_PRODUCT_SIZE%>)

19 Variables

19.1 Definition

Variables are placeholders, they return one or more values. They can contain fixed values or perform calculations and queries dynamically.
At run time, i.e. when running the Business Case, the value of the variable is calculated and returned to the variables location.

Syntax: <%Variable_name%>

Variable names are case-sensitive.

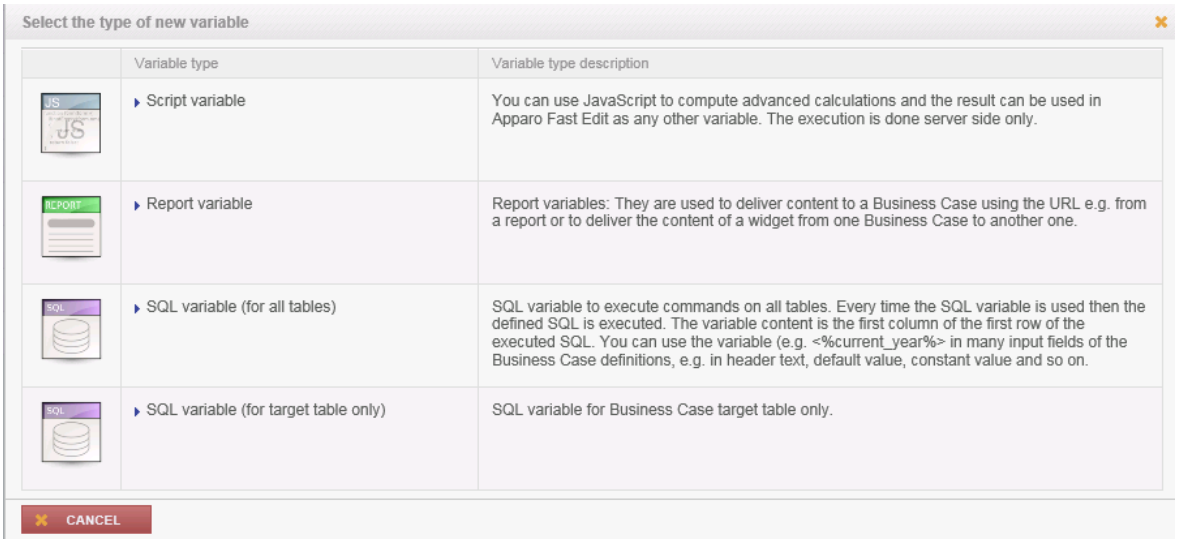
Basically, there are user-defined variables and internal variables.

Apparo Fast Edit supports 6 different types of variables:

- Internal pre-defined variables
- Operating system environment variables
- Script variables
- SQL variables
- Report variables
- Widget reference variables

Variables can be used in practically all settings and other variables

In Business Cases, you can create these types of variables:

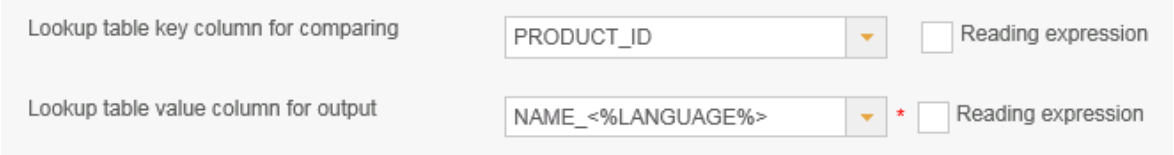


19.2 Use of variables in the Designer

Many widget settings can be made dynamic with variables.

Examples:

19.2.1 Variables in lookup definitions



The associated database column is composed of, Name_ 'and the return value of the language used. German users are assigned to the column NAME_DE and English users to the NAME_EN column

19.2.2 Variables in labels, hint texts, the header and footer

In this example, the heading of the column is output by variables

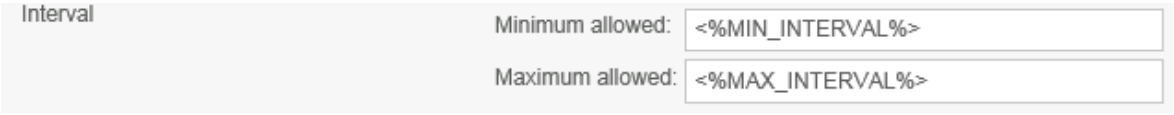
19.2.3 Variables in filter definitions:

Dynamic SQL filter

19.2.4 Variables used in data validations

Example for the use of dynamic variables as interval:

In a widget of type "input field", the permissible range of values is restricted:



Example of dynamic intervals that restrict the values input by calculations.

Dynamic values are realized via variable:

Our SQL variable is of type SQL variable (target table only). This has the advantage that automatically all user-group-dependent filters are used.

The current line is identified by the value in the widget PRODUCT_ID. That PRODUCT_ID is a primary key.

The following sample SQL for SQL variable would be possible:

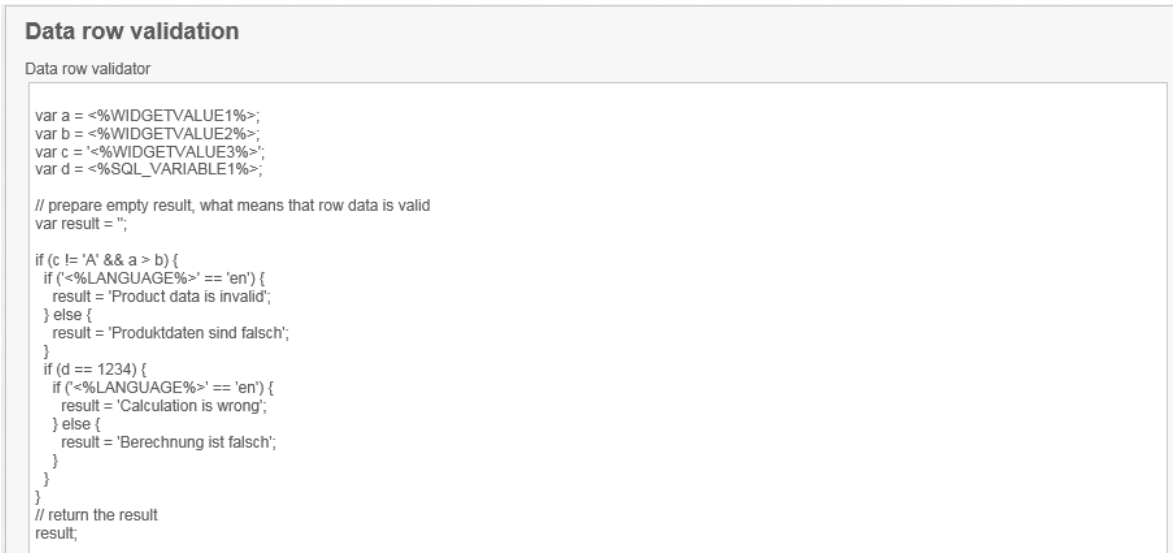
SELECT min_value FROM target_table WHERE product_id = <%PRODUCT_ID%>

In this case, <%PRODUCT_ID%> refers to the widget PRODUCT_ID in the Business Case and returns the current value.

The SELECT returns the value min_value of the current line and stores it in the new SQL variable "VAR_MIN_CALC ".

The SQL is executed every time when accessing the variable "VAR_MIN_CALC".

Example for the use of variables in the data row validation:

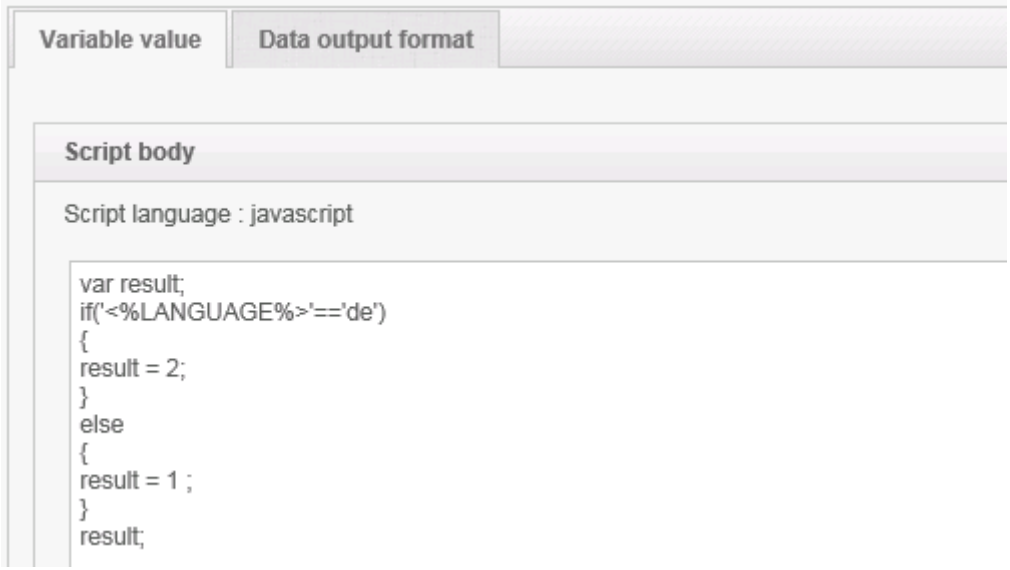


In this example widget reference variables, SQL variables and internal variables have been used

19.2.5 Variables in variables

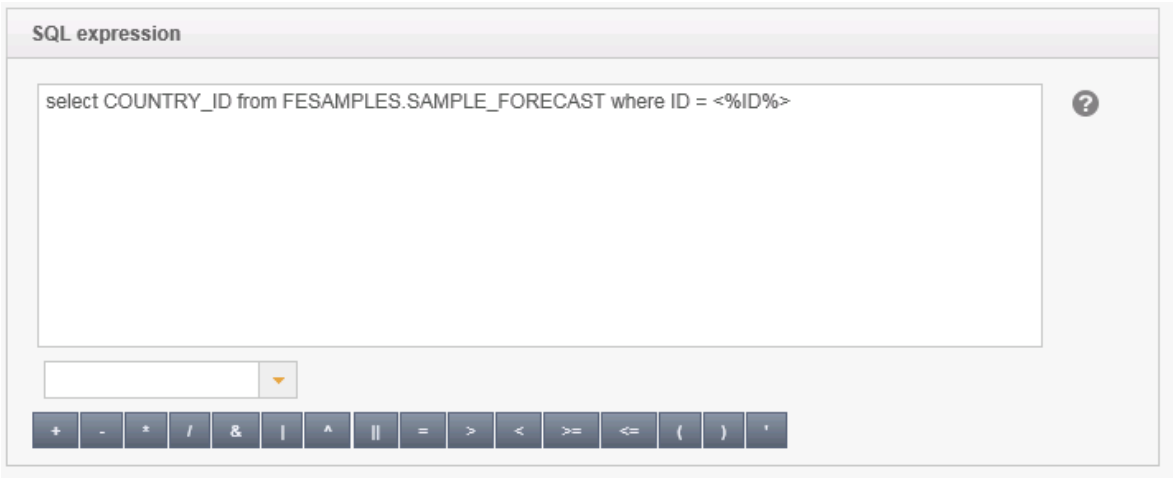
Examples for the use in variables

Script variable:



In this example, an internal variable is used within a JavaScript variable

SQL variable:



SQL variable: Widget reference variables are often used in SQL variables. JavaScript variables are also possible.

19.3 Internal Variables

The following variables are predefined and can be used immediately:

Variable name	Variable description
<%AFE_HOME_DIR%>	Folder on the server which contains AFE settings
<%AFE_BC_NAME%>	Name of currently opened Business Case
<%AFE_BC_ID%>	ID of the Business Case
<%AFE_CLIENT_ID%>	ID of the used client
<%SERVER_NAME%>	Name of server where Apparo Fast Edit is running
<%USER_NAME%>	Name of currently logged user
<%USER_LOGIN%>	Unique login name of currently logged user
<%LANGUAGE%>	Identifier of language in which user interface is displayed
<%CURRENT_DATE%>	Current date and time
<%DATE%>	Current date
<%TIMESTAMP%>	Current date and time
<%TIME_MS%>	The number of milliseconds since 1.1.1970 (UNIX timestamp)
<%PRIMARY_KEY%>	The primary key of current row
<%PRIMARY_KEYS%>	Comma delimited list of the used primary keys
<%ROW_EDIT_TYPE%>	Type of data modification. Output is of type string
<%SELECTED_ROWS_COUNT%>	This variable is helpful for output e.g. "Are you sure you want to delete X rows?"
<%ROWS%>	Count of current visible rows
<%BULK_UPDATED_ROWS%>	Count of all updated rows
<%INSERTED_ROWS%>	Count of all inserted rows during Excel import
<%UPDATED_ROWS%>	Count of all updated rows during Excel import
<%IMPORTED_ROWS%>	Count of all imported rows during Excel import
<%IMPORTED_FILE_NAME%>	Name of the currently imported Excel file
<%EXCEL_IMPORT_ID%>	Universally unique identifier (UUID) of type String of each Excel import
<%EXPECTED_COLUMNS%>	List of expected columns for Excel import
<%LINE%>	This variable is helpful for display error during import e.g. "Import error in line X:"
<%SAME_PK_ROWS%>	It is helpful for display error message like "There is already a row with the same primary key value(s). Counting <%SAME_PK_ROWS%>"
<%UPLOADED_FILE_NAME%>	Name of the uploaded file (file upload/download widget)
<%DELETED_FILE_NAME%>	Name of the deleted file (file upload/download widget)
<%RETURN_VALUE%>	In this variable the return code of the function/script is stored.

If the Business Case uses search fields, e.g. a filter lookup, then the matching variables are automatically defined for each search widget:

<%SEARCH_KEY_COLOR%>	Key-Value of the Lookup widget, mapped to column 'COLOR'
<%SEARCH_VALUE_COLOR%>	Value of the Lookup widgets, mapped to column 'COLOR'

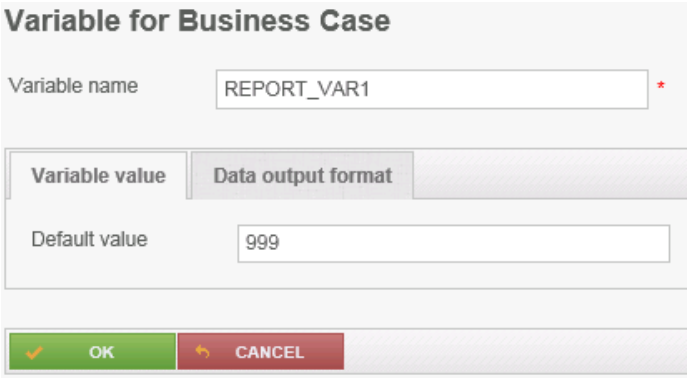
19.4 Report Variables

They are used to deliver content to a Business Case using the URL e.g. from a report or to deliver the content of a widget from one Business Case to another one.

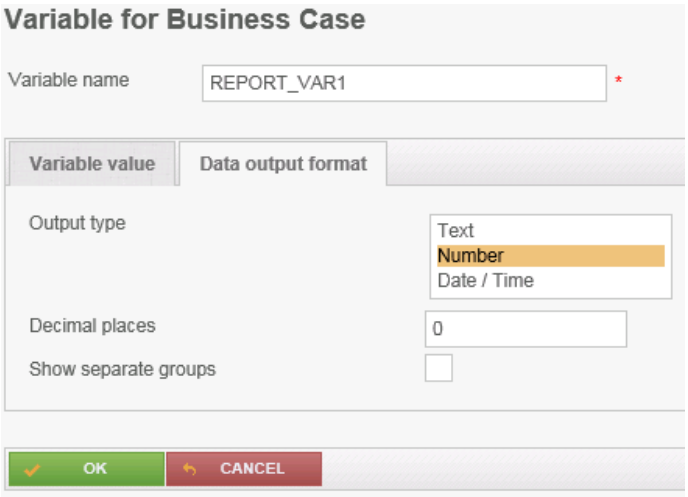
Using a hyperlink in the report, the value can be transported to the connected Business Case.

A report variable in reports has the syntax FE_name.

Here you can define the "name".



The default value is used only if the report does not provide a value for this variable.



In output format can set the data type.

Example of calling a Business Case from a Cognos report (URL):

/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/bridge.xts&c_env=/portal/env.xml&c_mode=post&c_cmd=/KFE/pages/userInterface.jsf?bc=BCNAME**&FE_Var1=1234**&backLink=%2Fcontent%2Ffolder%5B%40name%3D%27Apparo+Fast+Edit+Demonstration%27%5D

In the URL has the report variable Var1 the value 1234

In reality report variables are often used to transport e.g. the values of prompts to the Business Case.

19.5 SQL Variables

There are 2 different types of SQL variables:

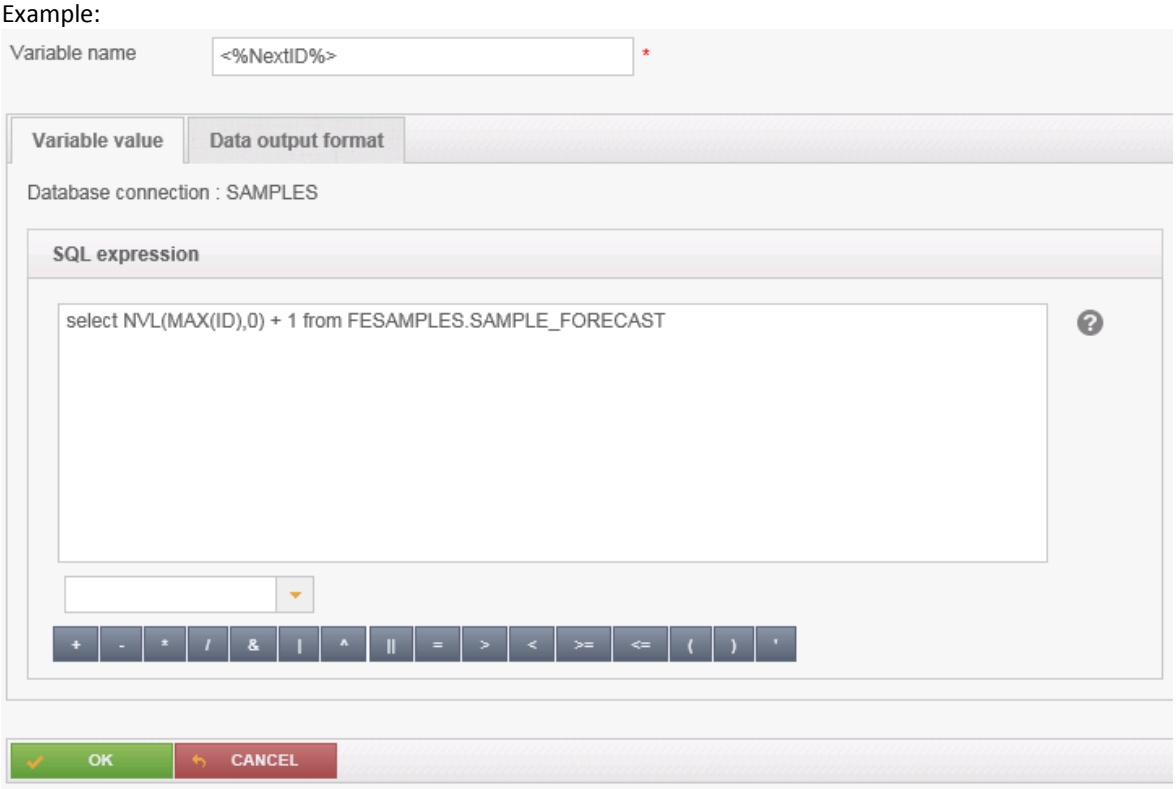
• SQL variable (for all tables)

SQL variable for executing selects in all tables. Each time you use the variable the associated SQL is executed. This variable contains the content of the first row, first column (depending on the SQL command)

• SQL variable (for target table only)

SQL variable for the Business Case target table. All filters of the Business Case are considered.

Example:



The main difference is that a **SQL-variable (for target table only)** automatic uses:

- The filter of the Business Case
- All security-dependent filters
- All Widget dependent filters

Therefore, the SQL of the variable must also use the target table so that the filter will also find the same column names.

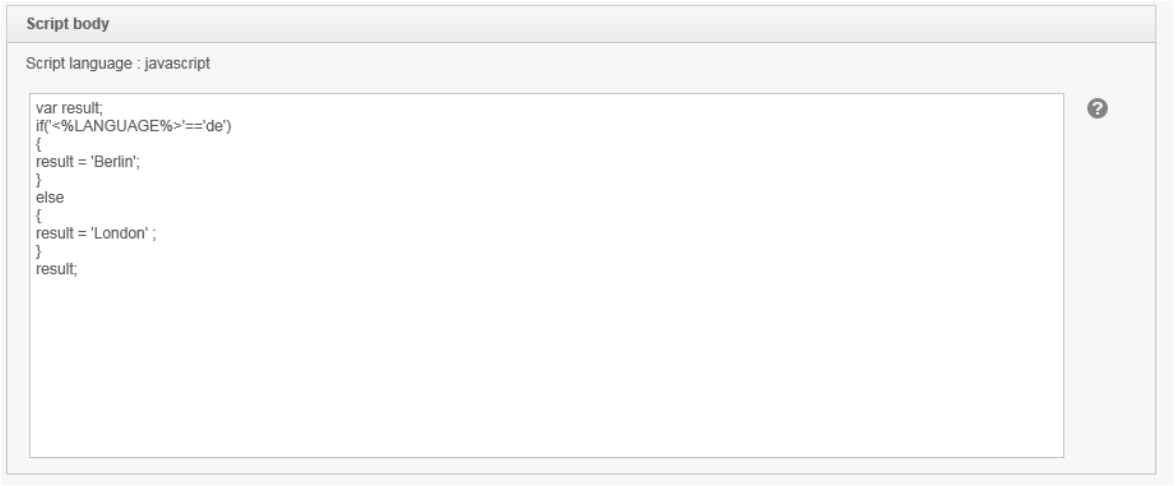
SQL variables (for target table only) are very useful for calculations that relate to the target table - e.g. sum of all sales, as all the used filters are considered automatically.

Since the output changes when using filter widgets, usually this dynamic filter restriction must also be considered.
In a **SQL variable (for target table only)** this is done automatically, in opposite to a SQL variable (for all tables).

An SQL variable is always executed when it is used.
As result, the first result value is used.

19.6 Script Variables

A script variable is a routine that returns a value. It is not connected to a database session.



The calculated value is returned by ‚result'

You can use in the JavaScript routine SQL variables, reference variables and internal variables too.
The Logic is defined by **JavaScript** and can be combined with SQL-Queries.

You can use scrip variables within database connection settings, but connection pooling will be disabled then.

19.7 Widget reference variables

They include the value of a widget in the corresponding row.
Due the row reference these variables can be used only where a row reference is applicable.
They cannot be used e.g.: in the calculation area or in the header and footer.

Syntax: <%COLUMN_NAME%>

Editing widgets

Column	Column name	Widget type	Title	PK	RO	H	NN
1		Spacer & Title				☐	
2	OFFICE_ID	Input field	Office	☑	☐	☑	☐
3	PRODUCT_LINE_ID	Lookup dropdown (for all tables)	Product line	☑	☐	☐	☐
4	PRODUCT_ID	Lookup dropdown (for all tables)	Product	☑	☐	☐	☐
5	MONTH_ID	Lookup dropdown (for all tables)	Month	☑	☐	☐	☐
6	SALES	Input field	Sales	☐	☐	☑	☐
7	STATUS_ID	Lookup dropdown (for all tables)	My status	☐	☐	☐	☐
8	STATE_REVISION_ID	Lookup dropdown (for all tables)	Revision status	☐	☑	☐	☐
9	FORECAST	Input field	Plan data	☐	☐	☐	☐

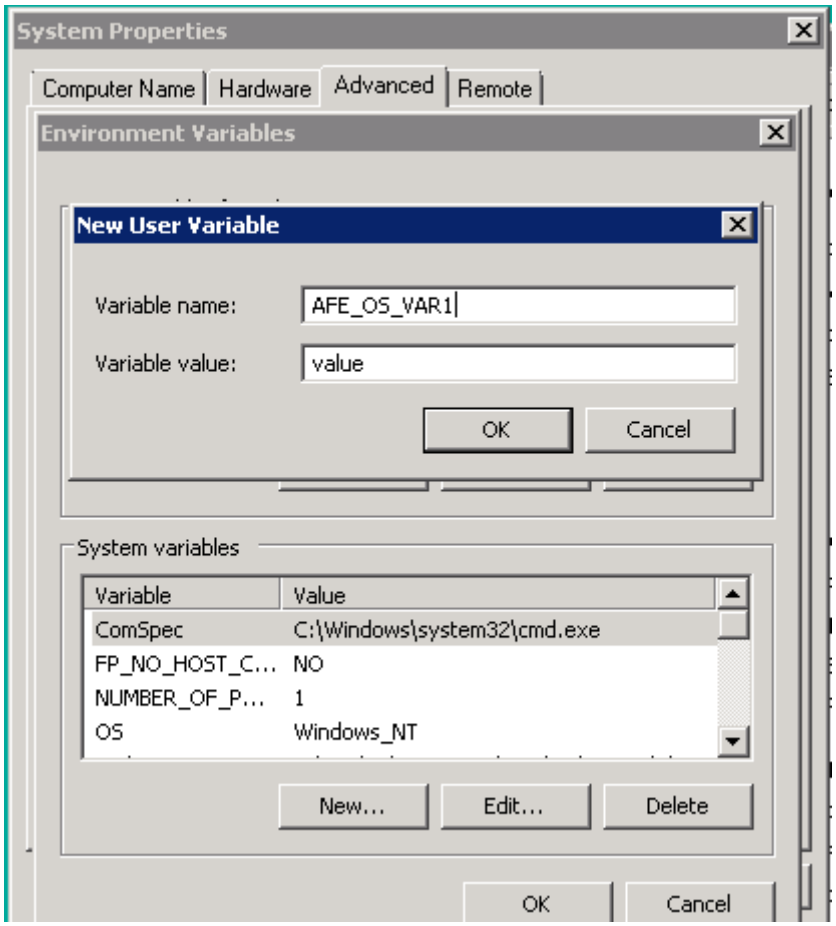
Example of a widget reference variables: <%OFFICE_ID%>

19.8 Environmental variables

These variables are defined in the operating system and can be used in all Business Cases.

Syntax: <%AFE_VARIABLE%>

Example of the definition in Windows:



To be recognized by Fast Edit the variable must start with 'AFE_'

19.9 Debugging variables

In the use of script and SQL variables with increasing complexity occur more frequently logical and/or syntactical errors. This chapter gives you an insight on how to recognize or find the errors.

19.9.1 Definition

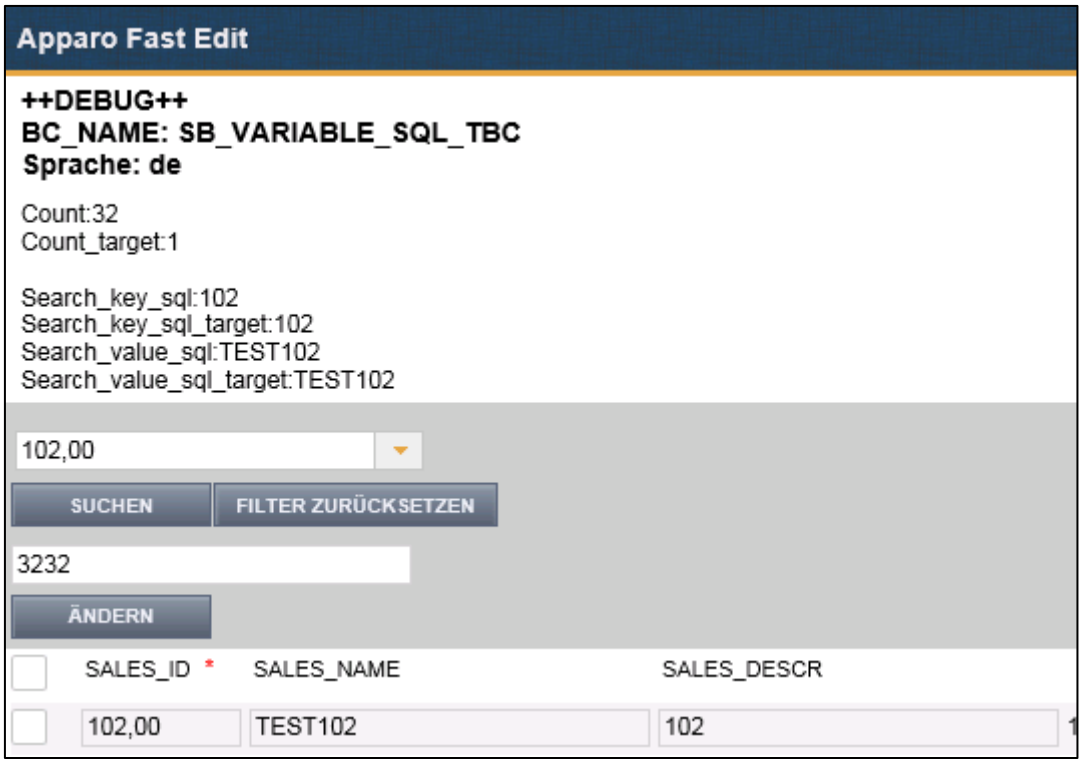
With debugging the search and elimination of errors is called in computer science.

19.9.2 Variable output for debugging purposes

If variables are not shown on the Business Case, e.g. when they are used in other variables or used for passing parameters in script or DB procedure calls, it is often difficult to detect errors.
It is therefore advisable to output these variables directly in the Business Case, at least during the development phase.

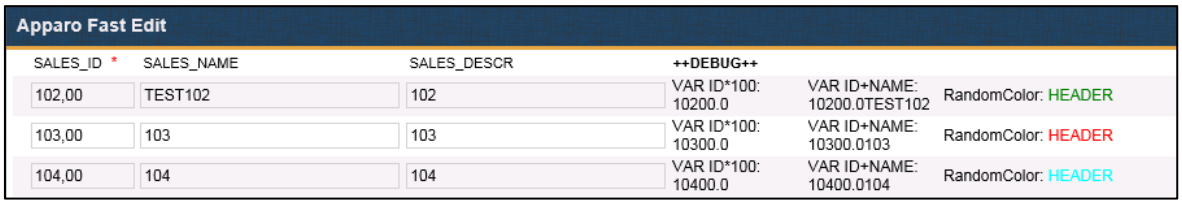
Variable output in the head area

Variables without row reference can be output directly in the head area:



Variable output in the edit area

Variables with row reference, that are generally widget reference variables or script- and SQL variables, containing widget reference variables, cannot be output in the header for debugging purposes because widget reference variables always contain the content of the widget, in the row they are used.



19.9.3 Debugging script variables

In addition to the substantive examination by outputting in the head area, there are other ways to check for errors:

Syntax check for script variables

JavaScript variables make it possible to check the included JavaScript commands for syntax errors. If errors occur, the corresponding line is highlighted and a description of the error is displayed below the script area.

In the following example, the semicolon at the end of the first line is missing:

If the syntax is without errors, the error check displays an appropriate message:

Error output in the log

Errors in JavaScript variables are always output in the AFE Log.
You can find the file "afe.log" in the folder [Apparo-HOME]/FastEdit/logs/

When using our example variable in the header area you would find the following error in the log:

2015-05-07 14:02:03,547 [ajp-apr-9800-exec-8] WARN ScriptVariableResolver - The exception is: sun.org.mozilla.javascript.internal.EvaluatorException: syntax error (<Unknown source>#1) in <Unknown source> at line number 1
2015-05-07 14:02:03,547 [ajp-apr-9800-exec-8] WARN ScriptVariableResolver - Error in script variable named '100'
2015-05-07 14:02:03,547 [ajp-apr-9800-exec-8] WARN ScriptVariableResolver - The script body is:
var x = * 100;
//Rückgabegabe des berechneten Wertes
x;

The widget reference variable here was not resolved because of the missing row reference and was producing an erroneous formula.

19.9.4 Debugging SQL variables

Error in SQL variables are displayed in the output in the header or edit area, and in the file afe.log.

A better way to identify problems with SQL variables provides the SQL Trace log, which must be activated in the designer:

You can find the file **"afeSQL.csv"** in the folder **[Apparo-HOME] / FastEdit / logs /**

In the trace log all SQL queries are stored in tabular form with the following information:

Timestamp, client, business case, user name, execution time, SQL command

07.05.2015 15:26	T3	sb_variable_sql_TBC1	de	0:00:00.000	Select count(SALES_ID) from TESTING.SAMPLE_SALES

Typical error outputs are:

Select cuont (SALES_ID) from TESTING.SAMPLE_SALES ORA-00904: "CUONT": invalid identifier

Or

Select SALES_DESCR from ''.SAMPLE_SALES where SALES_ID = '' ORA-00903: invalid table name

20 Data hierarchies

For the presentation of hierarchical data are lookup widgets ideal.
The easiest way is to explain this with an example.
For our example, we select geographical data. The top level are the continents, subordinated therein are countries and therein regions.

20.1 What do we need?

For the illustration of this hierarchy we need four database tables.

1. The target table, which stores the actual records
2. Three lookup tables containing the IDs of the data set, the real name and the ID of the parent element.

The assignment to the parents are done via the ID of the predecessor, for example, each country has additionally added the ID of the continent on which it is located.

To practice it, the scripts of each table:

Target table:

```
CREATE TABLE SAMPLE_LOOKUP
  (       "LOOKUP_ID" NUMBER,
          "LOOKUP_CONTINENT" NUMBER,
          "LOOKUP_COUNTRY" NUMBER,
          "LOOKUP_REGION" NUMBER )
```

Lookup table continent:

```
 CREATE TABLE SAMPLE_LOOKUP_CONTINENT
  (       "CONTINENT_ID" NUMBER,
          "CONTINENT_NAME" VARCHAR2(100 BYTE)  )
```

CONTINENT_ID	CONTINENT_NAME
1	AMERICA
2	AFRICA
3	AUSTRALIA
4	EUROPE
5	ASIA
6	ANTARCTICA

Lookup table country:

```
CREATE TABLE "TESTING"."SAMPLE_LOOKUP_COUNTRY"
  (       "COUNTRY_ID" NUMBER,
          "COUNTRY_NAME" VARCHAR2(100 BYTE),
          "CONTINENT_ID" NUMBER  )
```

COUNTRY_ID	COUNTRY_NAME	CONTINENT_ID
3	BRAZIL	1
4	ZAMBIA	2
5	RSA	2
6	MOROCCO	2

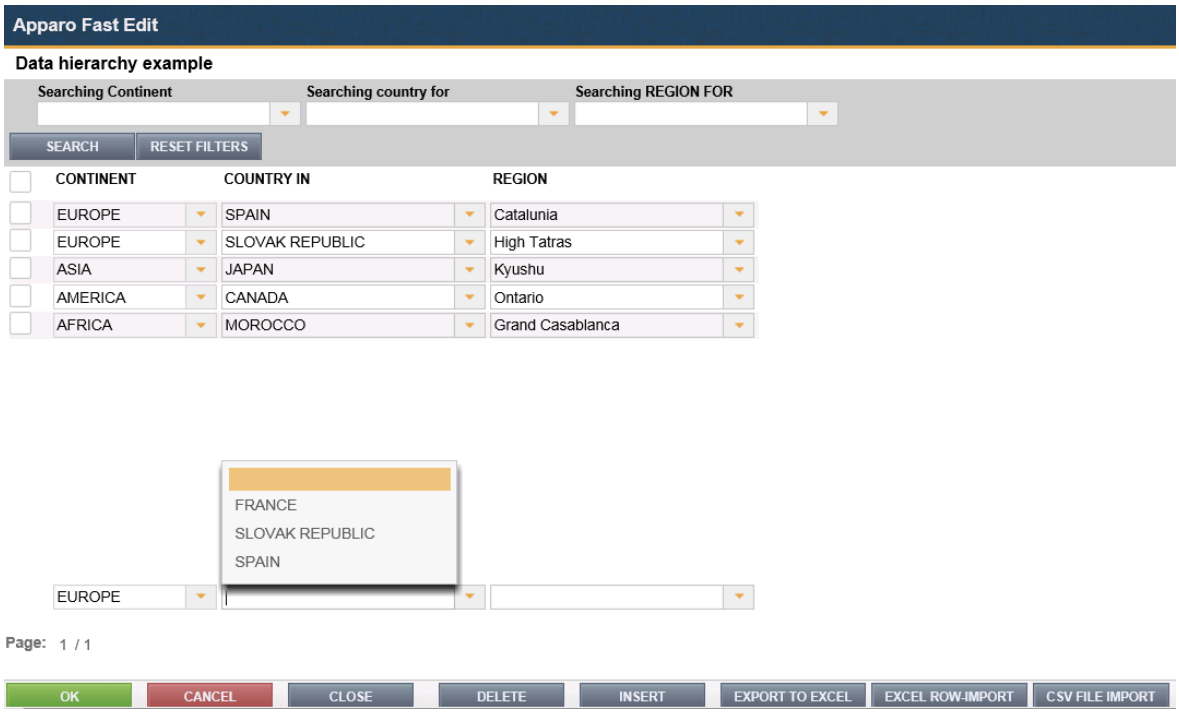
Lookup table region:

```
CREATE TABLE "TESTING"."SAMPLE_LOOKUP_REGION"
  (       "REGION_ID" NUMBER,
          "REGION_NAME" VARCHAR2(100 BYTE),
          "COUNTRY_ID" NUMBER  )
```

REGION_ID	REGION_NAME	COUNTRY_ID
1	California	1
2	Illinois	1
3	Alabama	1
4	Ontario	2
5	Quebec	2
6	Manitoba	2

20.2 Expected result

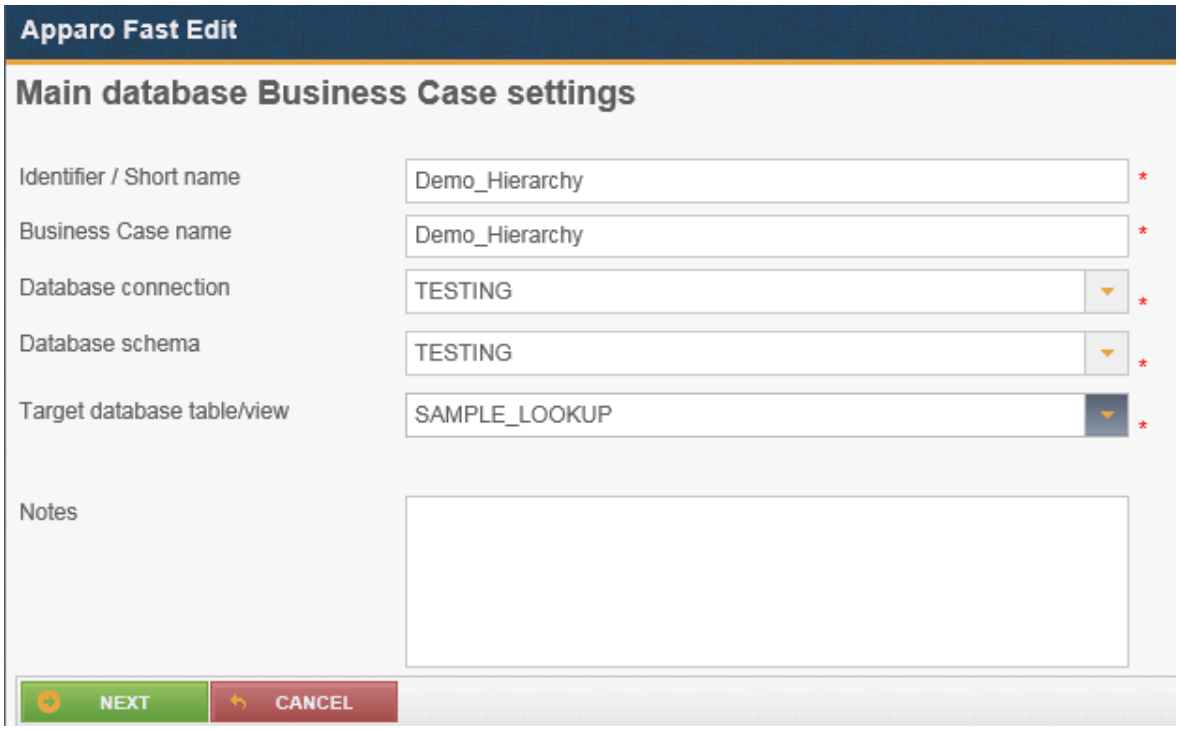
At the end we want a Business Case, in which the selection of a country is depending of the previously selected continent. The selectable countries shown are on the selected continent. If we choose the country, then the only selectable regions in the final lookup widget, are laying in the previously selected country. For the filter widgets used this should also apply.



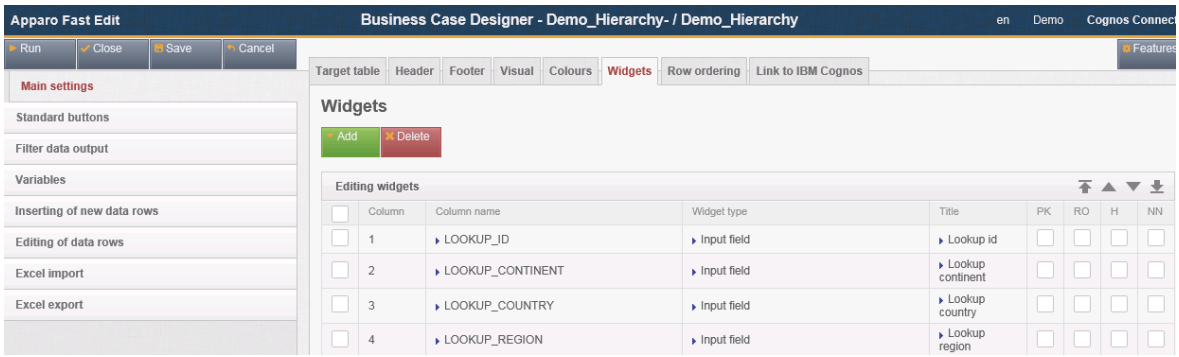
20.3 Implementation

20.3.1 Creation of the Business Cases

First, we need a Business Case, which is assigned to the target table.

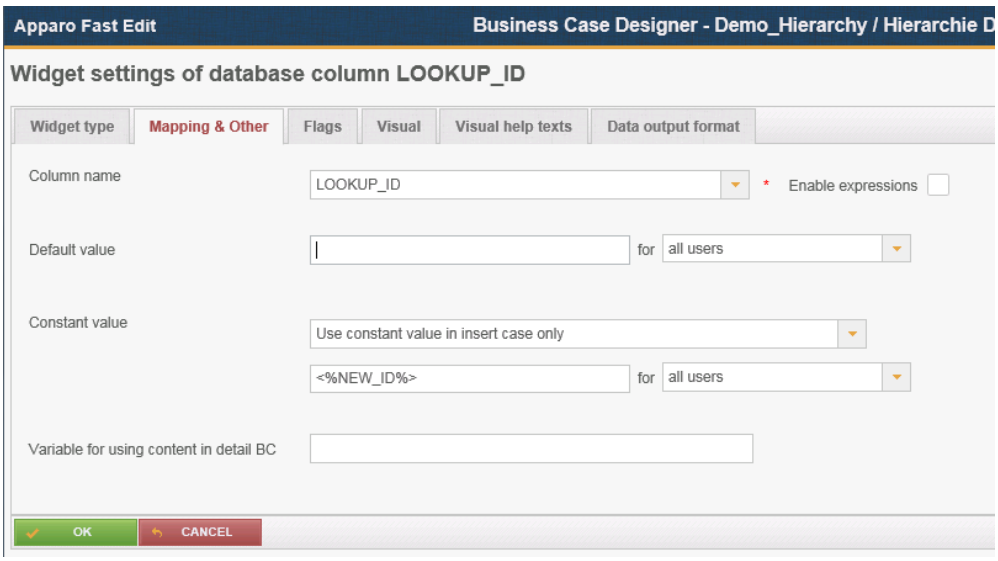


First, our Business Case looks like this:



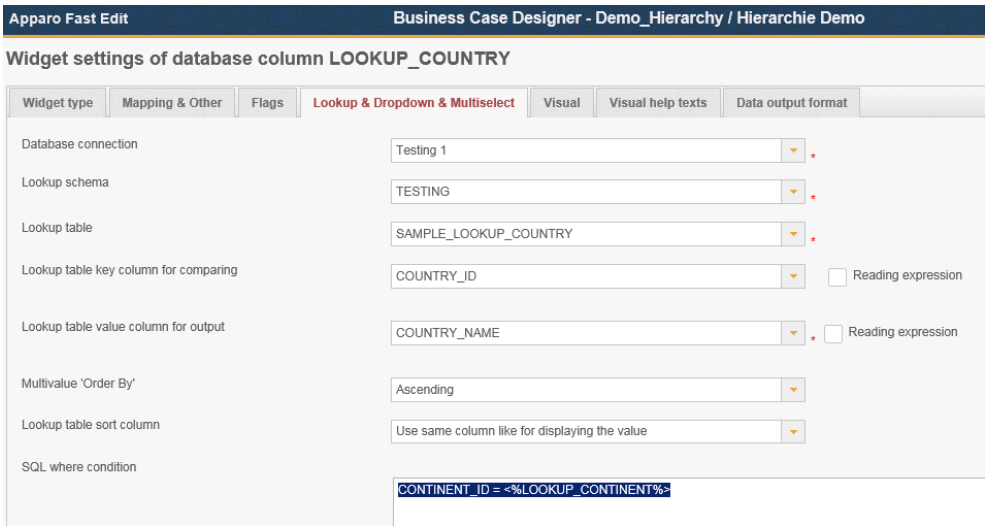
20.3.2 Customizing of the Business Case

We set the widget ID as the primary key and hide the widget. We produce the consecutive numbering either by DB trigger or an SQL variable, which we set as a constant in the widget.



In the next step we will modify the widget types of the remaining widgets to lookup widget (Lookup dropdown (for all tables))

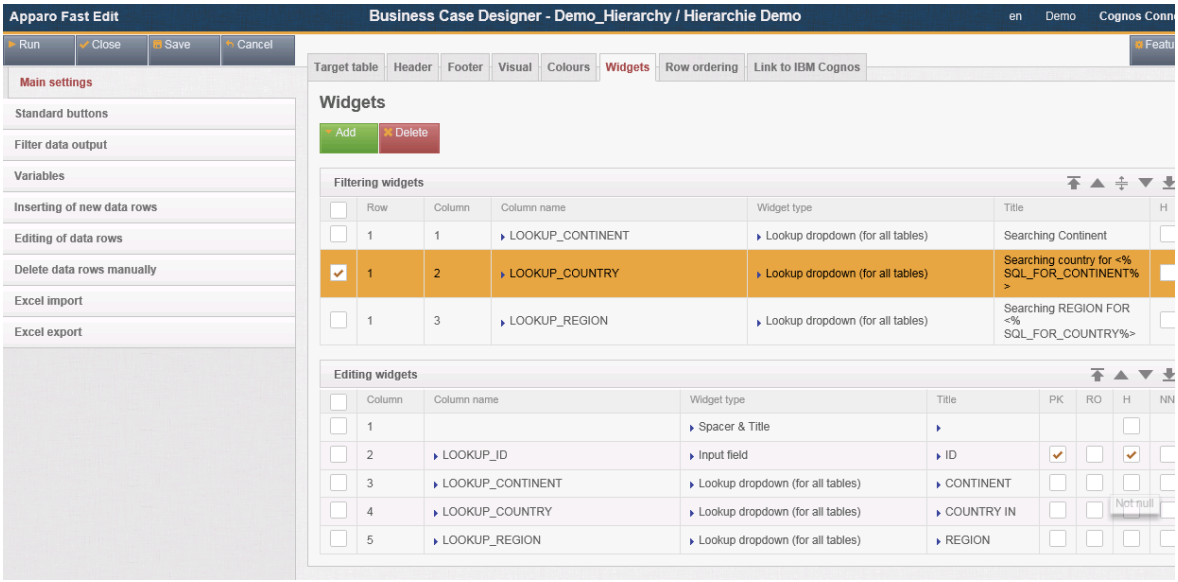
For the child widgets, we add an additional filter in the setting, SQL where condition. Thus, the selection of widget is limited to all elements in the lookup table associated with the previously selected continent. The value for this comes from the widget continent previously selected, and will be handed over with the widget reference variable <% LOOKUP_CONTINENT%>.



This applies accordingly for the to be generated filter widgets, but as the widget reference variable for the previous filter element is here used:

CONTINENT_ID = <%SEARCH_KEY_LOOKUP_CONTINENT%>

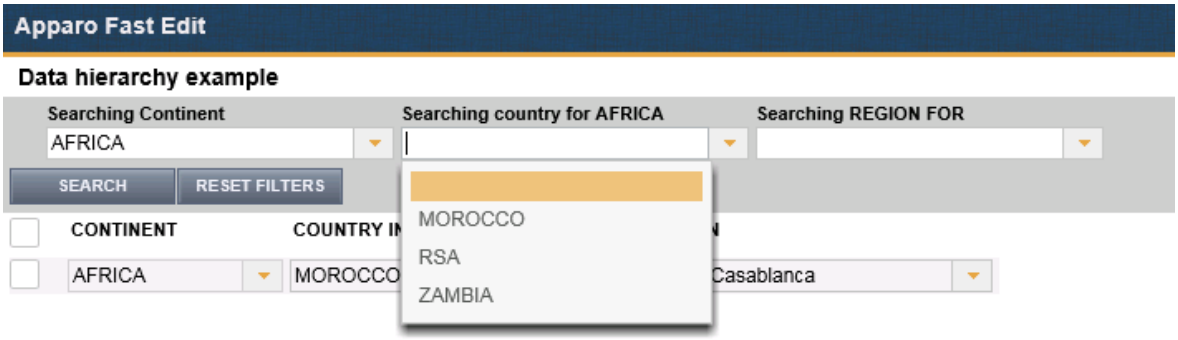
Then our business case should look like this:



In the title of the subordinate filter widgets, we have also added a variable to display the previously selected item.
The SQL variable contains the following Select:

SELECT CONTINENT_NAME FROM TESTING.SAMPLE_LOOKUP_CONTINENT WHERE CONTINENT_ID = <%SEARCH_KEY_LOOKUP_CONTINENT%>

And the result for the user looks like this:



21 Excel Import

Excel is still one of the most powerful data processing programs.
An ideal way to edit and present data in a simple way.

Unfortunately, Excel has disadvantages, the data is locked in a local file.

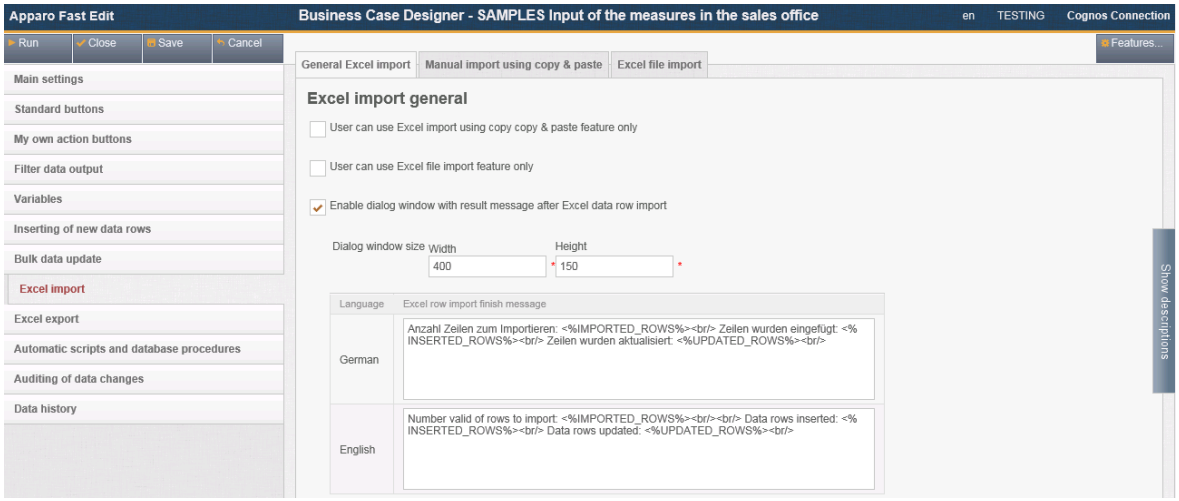
Apparo Fast Edit offers several ways for the Excel import. Thus, the data can be tested auditable for errors and transferred in appropriate media (databases).

Excel import options

- With copy & paste directly from an open Excel file (Manual Import)
- By file import via the browser (File Import)
- Through automatic import from defined directories (Auto Import)
- By importing e-mail attachments (E-Mail Import)

The automatic import and import via e-mail attachment always requires a table business case,
in which the settings for the (manual) import are defined.

21.1 General Excel Import



Options

User can use Excel import using copy copy & paste feature only

If enabled then the Business Case has just the Excel import functionality using copy & paste.
This means that then directly after Business Case starts the user is seeing only the Excel row import area so this Business Case is just usable for Excel row import.
If this Business Case is using the same primary key(s) like defined in the database table then it is helpful for improving import performance to disable the feature "Check primary key constrains before storing".

User can use Excel file import feature only

If enabled then the Business Case has just the Excel file import functionality. The user can select an Excel file and import the data.
This means that then directly after Business Case starts the user is seeing only the Excel file import page so this Business Case is usable only for the Excel file import.

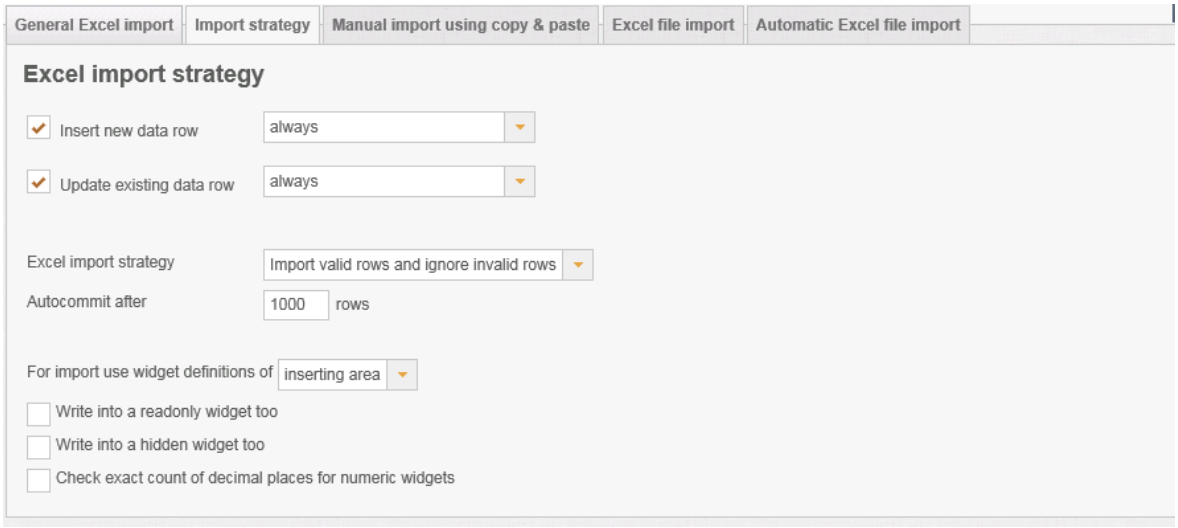
Enable dialog window with result message after Excel data row import

After an Excel import the user can see a small finishing message.
You can alter the text of this message here.

Special Import variables

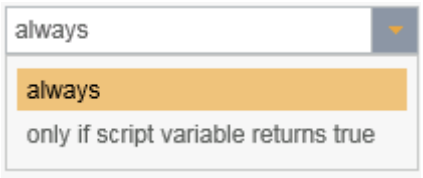
IMPORTED_ROWS	Count of processed rows
INSERTED_ROWS	Count of inserted rows
UPDATED_ROWS	Count of updated rows

21.2 Import strategy



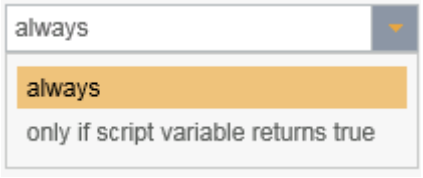
Insert new data row

If enabled then new data rows (the primary key values of this new data row are not found in the target table) are inserted
There are two options, either a new row is always inserted or only with the prior examination (via JavaScript variable)



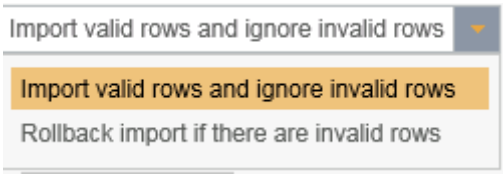
Update existing data row

If this is enabled, existing rows will be overwritten (if the primary key combination is used twice), either always or by variable checking.



Excel Import Strategy

With this feature you can configure the behavior of an Excel import.

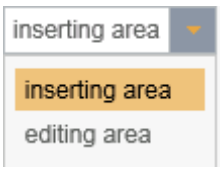


You can select between a complete rollback if there is invalid content (no data will be imported) or whether only valid content will be imported.

Auto-commit after 1000 rows

Apparo Fast Edit will commit the database transaction after defined number of rows has been processed in Excel import.
If value is 0 or no value is defined then this feature is disabled.
If the above setting is set to "rollback import if there are invalid rows" than this feature is disabled.

For import use widget definitions of



The Excel import is using the widget definitions (read-only, hidden) of the inserting area or editing area. That can be important if you want to define the list of expected columns, different behaviour for read-only widgets etc.

Write into a readonly widget too

If enabled then Excel import is overwriting the value of an read-only widget too

Write into a hidden widget too

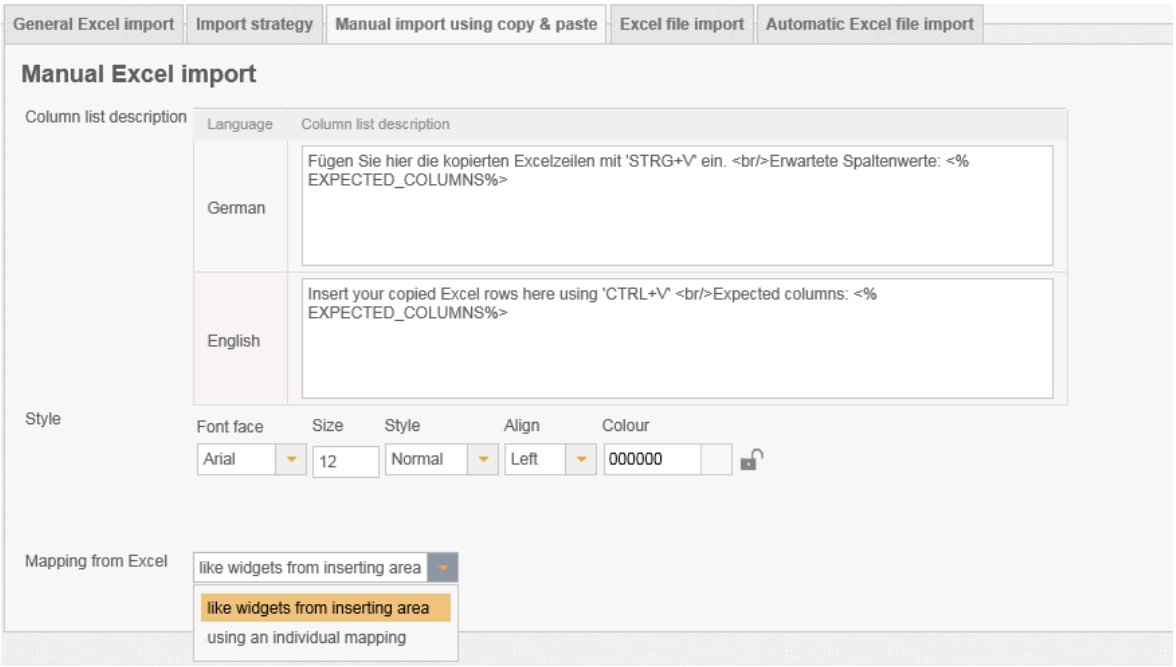
If enabled then Excel import is expecting a value for a hidden widget too

Check exact count of decimal places for numeric widgets

When enabled then numeric values to be imported must exactly match the specified count of decimal places defined in the widget's data output format setting (must be set to ''number'').

21.3 Manual Import using copy & paste

This feature enables a direct import of data rows from Excel using copy and paste into this Business Case. The user can mark many Excel rows (even more than 100.000 rows is possible), press the Excel import button and paste it into the text area. Of course the ordering of the Excel columns must be the same like in the Business Case. Read-only and hidden widgets are not used for mapping but are used if they have a constant value. It is not allowed to import Excel cell values that span over multiple rows, in this case use file import.



Column list description

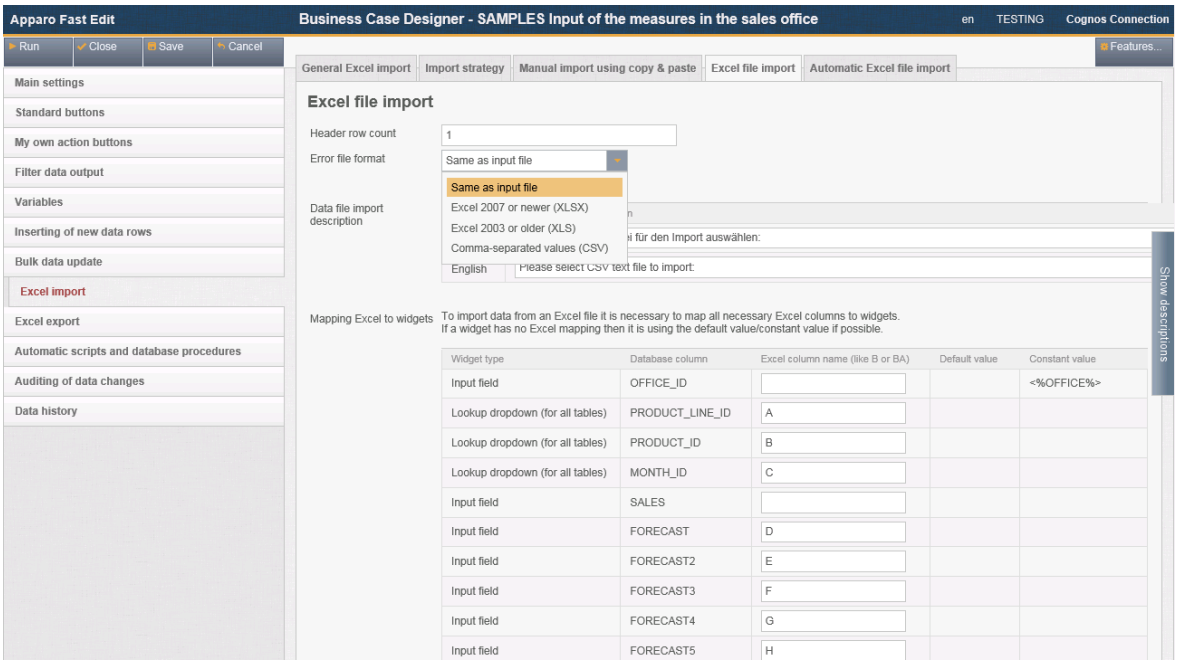
You can define a description text that is helpful for the user to know all expected Excel columns.
All variables are useable and HTML tags are possible too.
You can use the internal variable <%EXPECTED_COLUMNS> that has a list of all expected columns using the widget labels.
All hidden or read-only widgets are expecting no Excel column value but the default/constant values of the hidden/read-only widgets are used automatically

Mapping from Excel

If you want to important into different widgets than of the editing/inserting area then you can define an individual mapping for Excel file import too.

21.4 Excel File Import

This feature enables a manual import of a Excel data file into Apparo Fast Edit. The user can select an Excel file and the Business Case is importing the complete file.
Important: You must define a mapping of Excel columns like A,B,C and the associated widget. Just define the Excel column name in the right widget. You can define the count of header rows that must be ignored in tab "File Import".



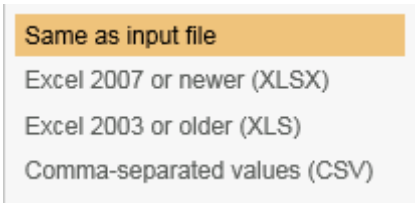
Options

Header row count

This number of rows are ignored during the import

Error file format

Format of a file containing errors and their descriptions, a user can download after an import that finished with errors.



Data file import description

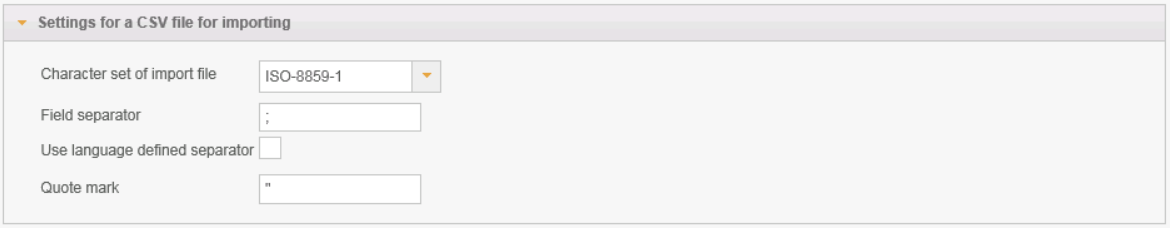
Contains the text of the ‚Choose file' dialog

Mapping Excel to widgets

For the import a mapping necessary. This mapping is defining all Excel columns that must imported using this Business Case.
If you input for example Excel column F for the 1. widget then all values of Excel column F will be imported into 1. widget.
If the Excel document has no value in a cell and the mapped widget has a default value defined then Apparo Fast Edit is using automatically the default value.
If a widget has a constant value then this value will be used for import depending on the setting (use constant value in insert case only or in insert/update case).

Settings for a CSV file for importing

When importing CSV files additional settings are required.



Character set of import file

Enthält eine Liste der verfügbaren Zeichensätze.

Field separator

Definition of the field separator. Using the next setting it is possible to use an own separator for each used language.
Hint: If you need tab character as separator use "\t"

Use language defined separator

When checked then Apparo Fast Edit detects language type from file (for example from filename_en.xlsx as "en") and uses separator defined for detected language from language messages.

Quote mark

Definition of the quote mark - character used to enclose fields containing a separator, usually "

21.5 Automatic Excel file import

It is possible to import files automatically which are accessible by the server (for example Excel files).
In this case Apparo Fast Edit checks whether files according to a specific file mask are available in a file directory of your choice.

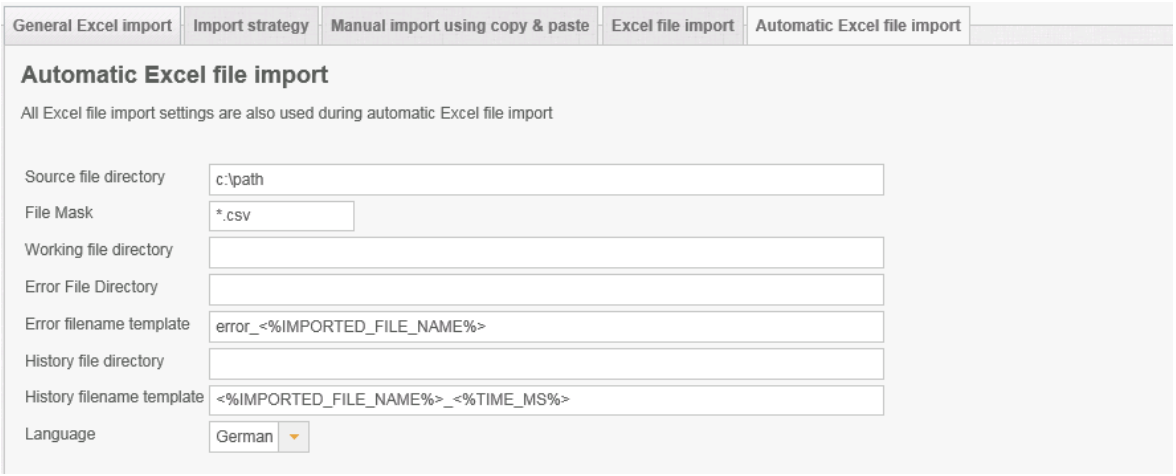
If yes, these files will be imported into the working directory. After the import these files are stored into the history file directory.

The settings "Field Separator" and "Header Row count" are used for manual file import too.

The time interval for looking into the feeding directory is definable in 'Global Settings'
Automatic import means that the business don't needs to be started. After enabling the features the import happens within the entered time period.

If the feeding directory is located on a second server, the Windows user who starts AFE must have the rights to access the directory on this second server.

All Excel file import settings are also used during automatic Excel file import



Options

Source file directory

Defines the file directory in which Apparo Fast Edit looks for files to import. It is looking after each 'n' seconds into this directory.
The path can be: \\servername\folder1\folder2 or x:\folder1\folder2 or <%VARIABLENAME%>\folder or <%VARIABLENAME%>. The variable must deliver a correct path.
If empty then no automatic import will occur on this Business Case.

File Mask

The importable files must have the defined file mask.
File mask can contain wildcards ? and *.
Example: *.xls
Caution: If the filename matches the file mask of multiple Business Cases,
the used Business Case will be random. If empty, no automatic import will occur on this Business Case.

Working file directory

Optionally Apparo Fast Edit is moving the files to the 'Working file directory' first and then the import process is starting.
If empty, working file and directory will be the same as the feed file.

Error File Directory

File directory for error files with the error messages. If empty, no error results will be stored.
Error filename template

Template file name for error files.

The usage of variables is possible, for example:
<%IMPORTED_FILE_NAME%>
name of the imported file (without path)
<%TIME_MS%>
numeric (UNIX) timestamp
If empty, no error results will be stored.

History file directory

After import the files are moved into this file directory. If empty, no history will be stored.

History filename template

Template file name for history files.
Mask can contain placeholders <%PlaceholderName%> where PlaceholderName is one of:

IMPORTED_FILE_NAME name of the imported file (without path)
TIME_MS numeric (UNIX) timestamp

If empty, no history will be stored.

Language

Language definition (important for formatting such as formatting of date).

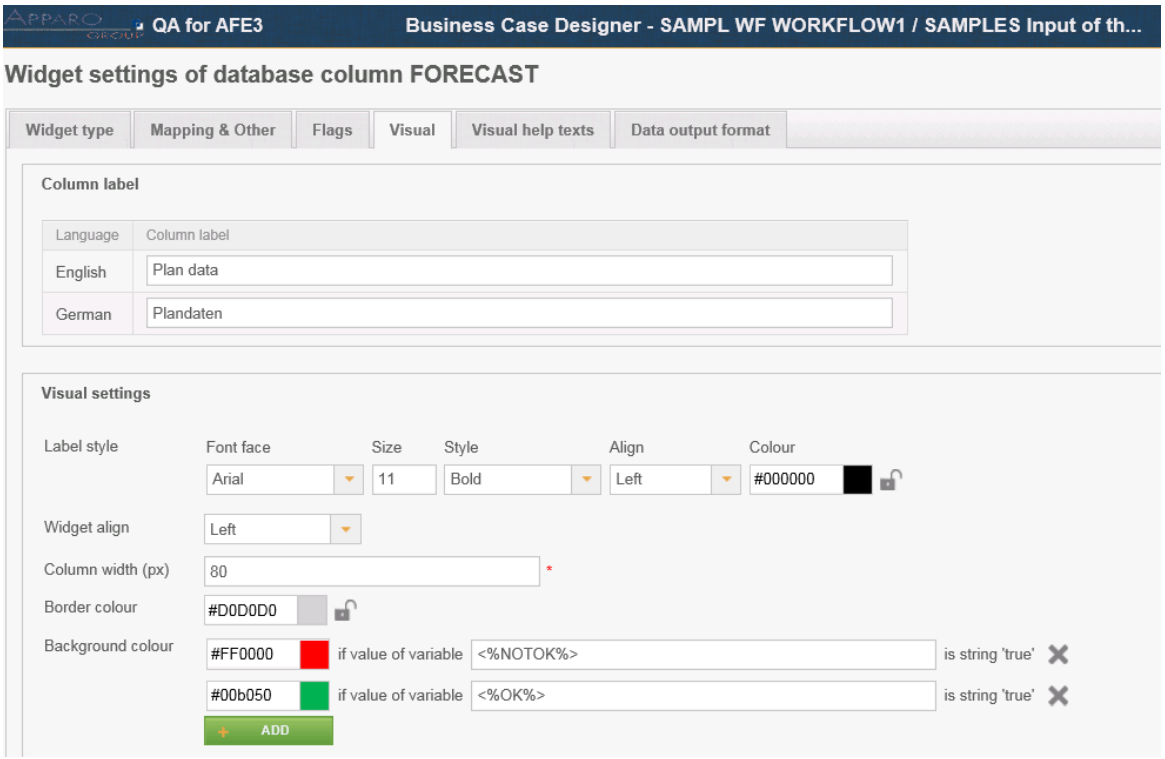
22 Conditional formatting

22.1 Background color

22.1.1 Widget background

You will find the conditional settings for the widget background in the tab 'Visual':

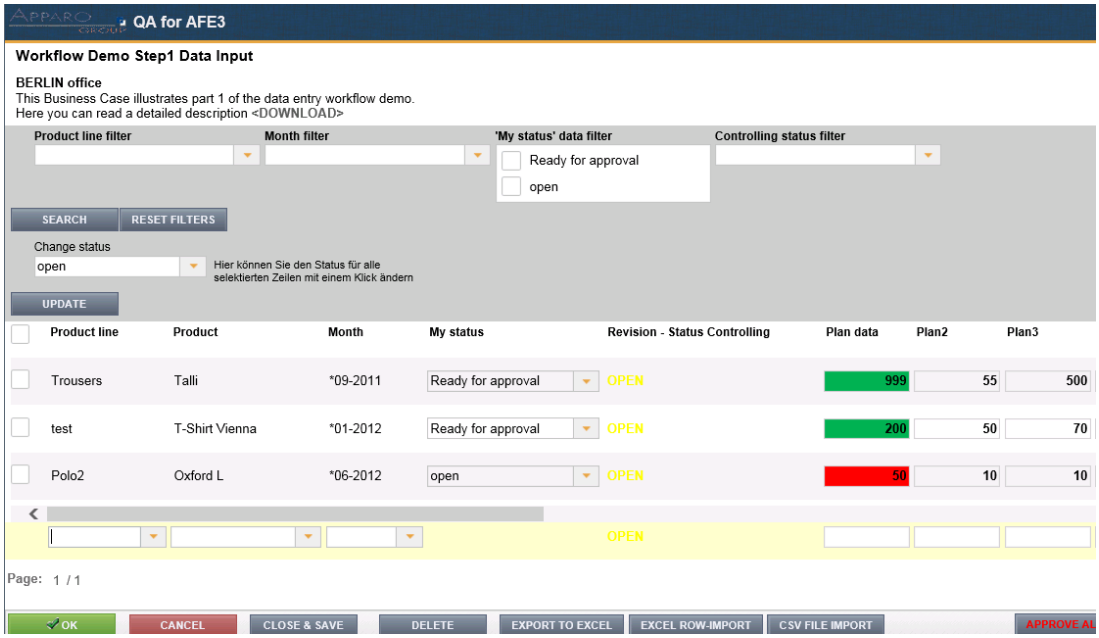
Click on add and define the color you want.
In the variable you can calculate anything you want, important is that the variable returns the string 'true' if the condition hits.



Example for the OK variable:

```
var z = <%FORECAST%>;
if (z >= 100){var x = 'true';}
else {var x = 'false';}
x;
```

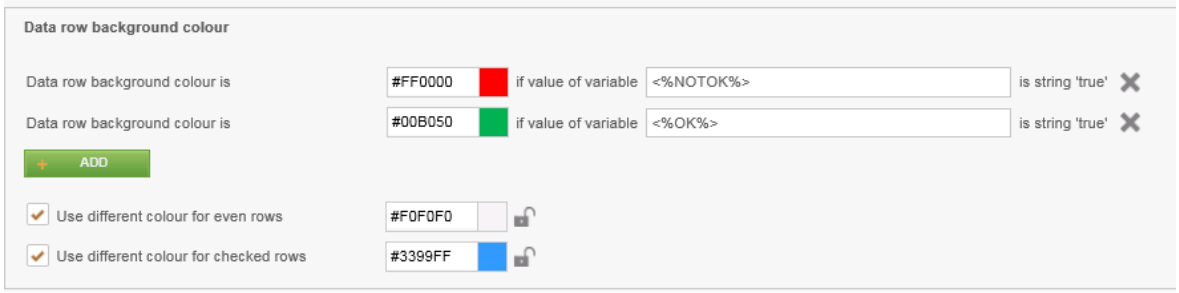
Result:



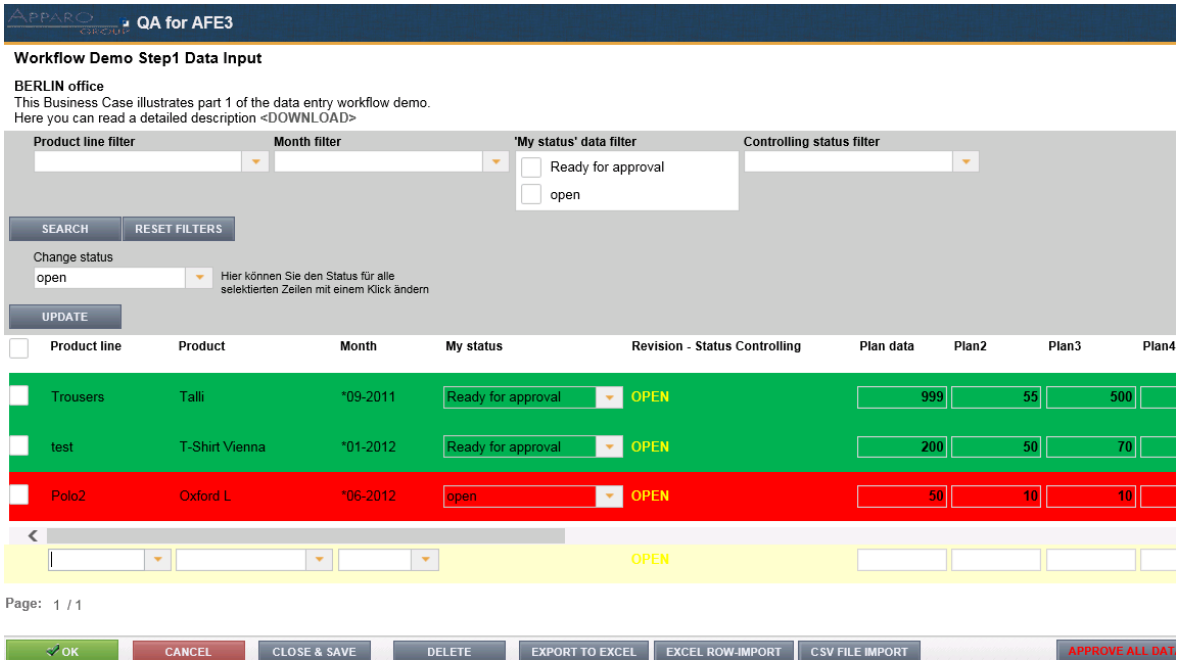
22.2 Row background color

You find this setting in the Business Case edit view, tab Colours:

Click on add and define the color you want.
In the variable you can calculate anything you want, important is that the variable returns the string 'true' if the condition hits

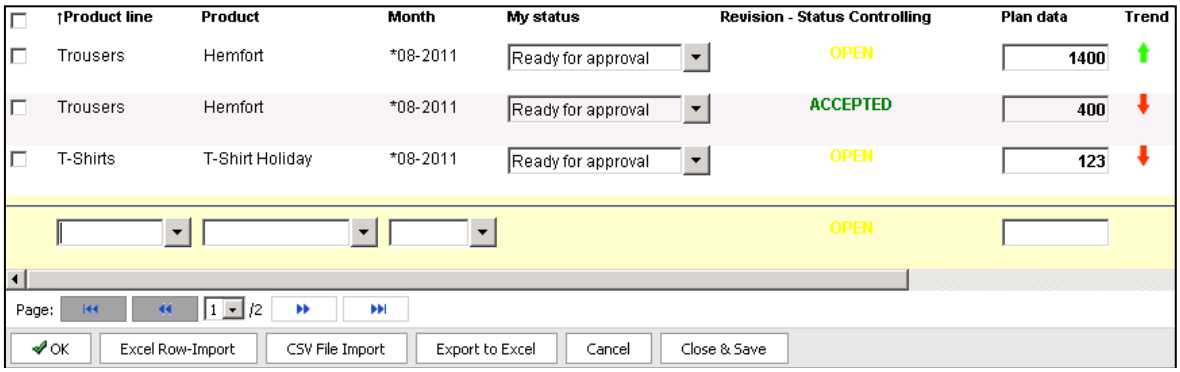


Result:



22.3 Conditional formatting using HTML & JavaScript

The goal is to have following output:



This example shows how we created the colored text for the widget ‚Revision – Status Controlling' and the arrows for the widget ‚Trend'

22.3.1 Colored text for Status Controlling

This is generated by a JavaScript. For the output we are using 'label with variables' containing the variable.

Variable: <%conditional%>
var z = <%STATE_REVISION_ID%>;
if (z == 3){var x = 'DECLINED';}
else if (z == 2){var x = 'ACCEPTED';}
else {var x = 'OPEN';}
x;

22.3.2 Arrows for the ‚Trend' widget

This is generated by a JavaScript. For the output we are using 'label with variables' containing the variable. We inserted the arrow imagines into \Apparo\FastEdit\clients\images

Script-Variable: <%trend%>
var trend = <%FORECAST%>;
if (trend > 1000){var x = '<img src="http://aq34/KFE/images/arrow_green.gif">';}
else if (trend < 1000){var x = '<img src="http://aq34/KFE/images/arrow_red.gif">';}
else{var x = '<img src="http://aq34/KFE/images/arrow_dot.gif">';}
x;

23 Movies

Please find a collection of Videos about Apparo Fast Edit here

Movies.apparo.solutions

24 Support

If you need support please write an email to:

support@apparo.info