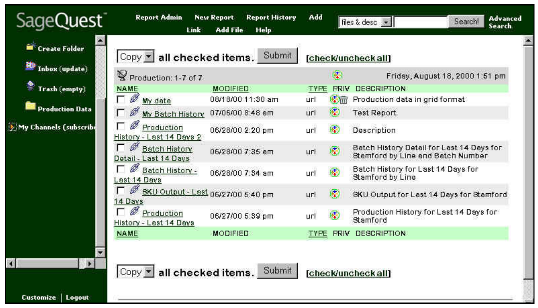
# CHAPTER 2

# SageQuest Portal Interface




Once you have successfully logged onto the SageQuest, you will be ready to use the portal to manage your data and view reports. This chapter describes all of the SageQuest program's menus, commands, and features. The SageQuest portal is a web-based application that provides a consise and accurate way to access and share content, such as ADM reports, MicroStrategy reports, Microsoft Word and Excel files, and internet web links. The SageQuest portal allows you to:

- Run MicroStrategy Web and Broadcaster reports.
- Modify, drill, format, export, print and surf on MicroStrategy Web reports.
- Create new MicroStrategy Web reports based on existing reports.
- Upload documents such as Microsoft Word and Excel files.
- Create links to other web sites.
- Organize reports, documents, and links into folders and channels.
- Share reports, documents, and links with other users through publishing.
- Search reports, documents, and links based on their names, descriptions and, in some cases, content.

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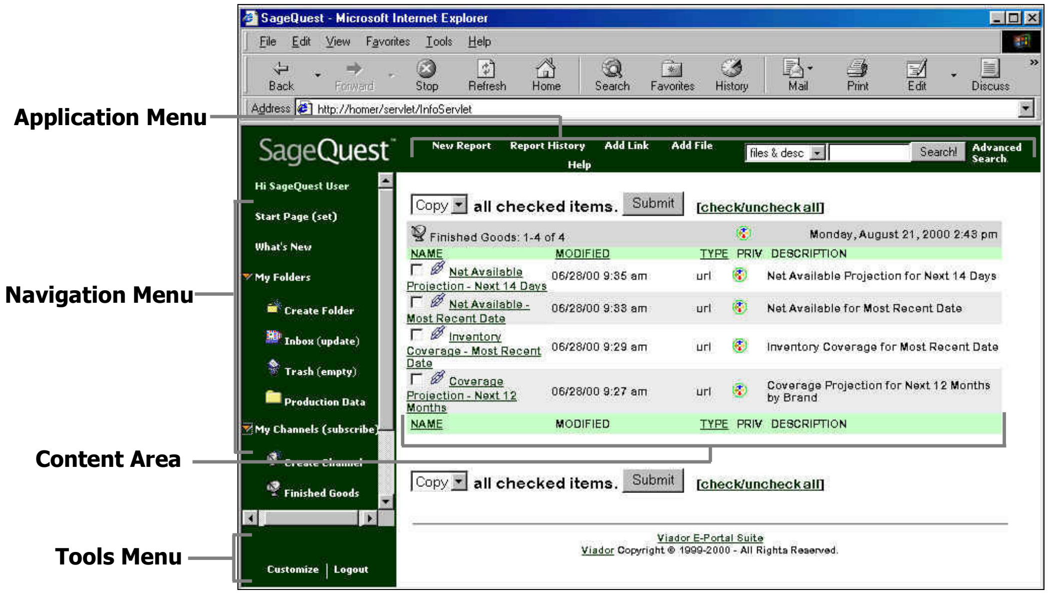
# SageQuest Portal Overview

The SageQuest Portal is displayed in a familiar browser interface using either Internet Explorer or Netscape Navigator. The portal interface is comprised of four main sections: the Navigation Menu, the Application Menu, the Content Area, and Tools Menu.



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# Navigation Menu


The Navigation Menu appears along the left side of the portal interface. It contains commands that are used to navigate between folders and channels of the portal. Your user name is displayed at the top of the menu. Commands in this menu allow you to create and modify a custom Start Page, view new information published to your subscribed channel or a group, create new folders to manage your portal information, and subcribe to various channels.

# Start Page (set)

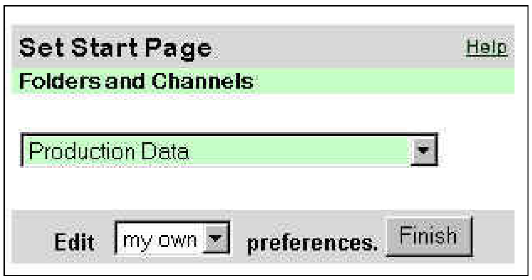

When you login to SageQuest, this is the first page that you will see in the Content Area of the portal. You can configure your Start Page to any root folder or channel that you have access privilages. By default, the Start Page contains the same information as your Inbox folder. You can customize your Start Page to display various types of information and reports. A typical example would be to have your company intranet page displayed or a list of various news headlines customized for your business needs.

## Configuring your Start Page

The Start Page is configured by clicking the **(set)** link.

**To set the Start Page**

1. In the Navigation Menu, click the Start Page **(set)** link. The **Set Start Page** dialog is displayed.




2. From the drop-down list, select which folder or channel you would like to see on your Start Page. If you do not see any folders or channels to select from, you may not have either configured your folders and channels or have access restrictions to your SageQuest account.
3. Click **Finish**.
4. Click **Start Page** to view the newly added content.

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# What's New


The **What's New** link displays a page of files, presentations, and links that have been added to the portal (which you have access to) since the last time you refreshed the application. It also shows items that have been published to groups you belong to, or channels you subscribe to. Newly published items to your Inbox are hightlighted in the What's New page. All items are considered new which have been published for 24 hours.

**Refer to** For more information on customizing the SageQuest portal, see the Customize Menu and Content Options topic, described later in this chapter.

**To view the What's New page**

1. In the Navigation Menu, click the **What's New** link. A page is displayed that lists all items that are considered "new" since the last time you reloaded (refreshed) the display.


2. To organize this new content, select the item(s) and click **Submit**. The information is copied from from the What's New page to another channel or folder of your choice.

# My Folders


This is a tree-view listing of all your personal folders. Folders are best used to organize SageQuest portal content. When a folder is opened, the contents of the folder are listed in the Content Area of the portal. Contained within the My Folders link are three primary links which allow you to create folders, view and update your Inbox data, and delete information

## Create Folder

This link allows you to create a personalized folder to organize your portal information.

**To create a folder**

1. Select **My Folders** link to expand the options and then click **Create Folder** .


2. Enter the name of the new folder and click **OK**. The portal content should refresh.
3. Click **My Folders** link to view the new folder.

Field Code Changed

**To create a subfolder within a primary folder**

1. Select primary folder and open it in the Content Area.
2. Click the **[new subfolder]** link.


3. Enter the name of the subfolder and click **OK**. The Portal content should refresh and display the subfolder in the Content Area and under My Folders.

# Inbox (update)

The **Inbox** link is a folder that displays content that has been published to you by other users. It also displays content that you have added to the portal through the Add Link and Add Folder features. The Inbox provides the same functionality as with other folders, such as moving, copying, deleting, and publish items. When a file is created or published, it is placed in the Inbox. It remains there until you either delete it or move it to another folder.

The **update** link will refresh your Inbox to display items that have been added since you last opened the Inbox.

# Trash (empty)

The **Trash** link is a special folder that displays items that you have deleted since you have last "emptied" the Trash. When you delete an item from a channel or folder, the item is placed in the Trash. It will remain there until you empty the trash. If you accidently delete an item, you can move items out of the Trash and into normal folders.

**To empty the trash**

1. From the Navigation Menu, click **(empty)**. SageQuest returns with a delete comfirmation message.
2. Click **Yes**.

**Refer to** For more information on moving, deleting, and editing items, refer to the appropriate topics later described in this chapter.

Field Code Changed

# My Channels (subscribe)


This is a list of the channels that you have permissions to access. Channels are used to organize content, such as, reports, images, links, etc. Expanding the **My Channels** link displays a list of your folders.

With normal user privilages, you are given access to view certain channels by the administrator. To see channels in your Navigataion Menu, you must use the **(subscribe)** feature to select the available channels. If a new channel is available, and you have access permission, you must use this feature to view it in your Navigation Menu.

By default, you can view documents that have been published to any channel you subscibe to. If another user publishes a document to a channel, all subscribers to that channel will be able to run or download the document.

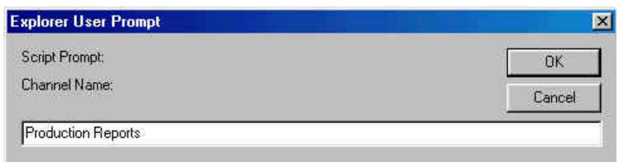
**Refer to** For more information, see the Roles, Groups, and Channels topic described later in this chapter.

## Create Channel

Clicking this link will create a new new channel. The new channel will appear under the My Channels link. To open a channel, expand the My Channels menu, and then click the channel you want to display

**To create a channel**

1. Select **My Channels** link to expand the options and then click **Create Channel** .

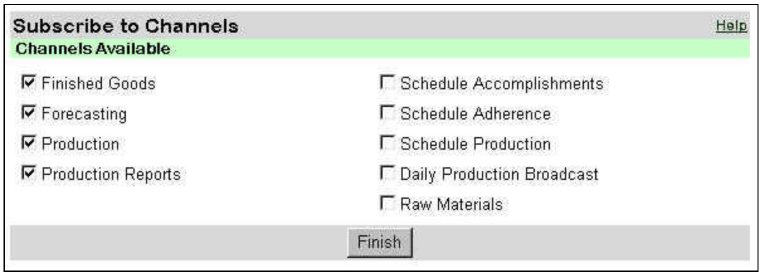



2. Enter the name of the new channel and click **OK**. The Portal content should refresh.


**Note** If you want others to have access to your newly created channel, they must subscibe to it.

### To subcribe to channels

1. From the Navigation Menu, click the **(subscribe)** link. A page is displayed that lists all available channels that you can subscribe.




2. Select each channel that you require and click **Finish**. The Portal content should refresh. Data contained in each channel is available for your use. As long as you have proper permissions, you can copy or publish this information to your own personal folders.

Field Code Changed

# Application Menu


The Application Menu is located at the top of the portal. It contains commands that allow you to add a new report, view report history, add a link to your Start Page, add a file to your Start Page, view help information, and search for published documents or files.

**Note** What you see in the Application Menu depends upon your account privileges.

# New Report


The New Report function allows you to creat a new report. Creating a new report involves three main steps: selecting the Report Template, the Filter Criteria, and the Report Layout.

## Report Templates

Report Templates are used to create a new report based upon an existing report's format. The existing report dimensions, attributes, and metrics are carried over to the new report.

The Report Templates page displays a listing of all of your reports organized by portal folders and channels. Navigate through the folders and channels to locate the desired report.

## Filter Criteria

This Filter Criteria step allows you to set the criteria that applies to the report. Criteria is set by adding and removing specific dimension elements which are used as filters when the report is created. The Dimension and Attribute lists display the dimensions and attributes that are available for this specific report.

This feature allows you to set simple **AND** criteria. Therefore, only the data that meets all of the criteria will be returned. When making multiple element selections within the same attribute, the criteria will fuction as an **OR** statement. Data will be returned as long as it meets any of the element selections within the same attribute.

### <<More>>

This appears at the bottom of the Elements listbox when there are more elements to be retrieved. Double-click **<<More>>** to display the additional elements.

## Report Layout

The Report Layout step sets the Layout for your report. A list of available attributes and metrics that apply to this report are displayed. You must have at least one attribute for each **Across Layout** and **Down Layout** columns.

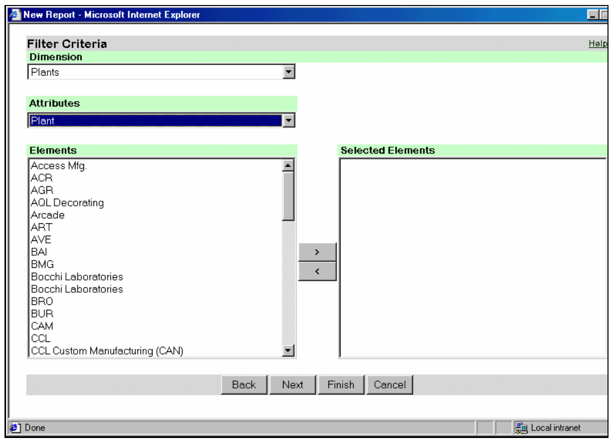
Selecting a metric or attribute in the "Available Attributes" listbox displays a description for the item.

Field Code Changed

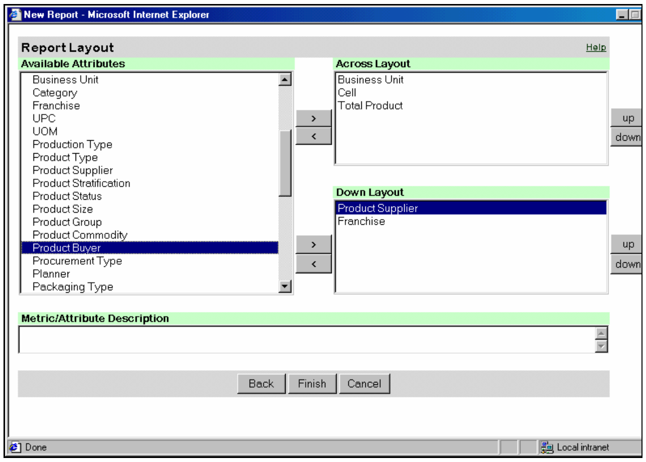
**To create a new report based upon an existing report**

1. From the Application Menu, click the **New Report** link. The Reports Template page is displayed.


2. Double-click on Channels or Folders to navigate to the desired report.
3. Click **Next** or **Finish**. The Filter Criteria page is displayed.




4. In the **Dimensions** and **Attributes** lists, select the appropriate filter criteria that you want to base your report. Selecting a dimension and then an attribute will display the elements for that attribute.
5. In the **Elements** list, select the elements required for your report. Multiple items can be selected by pressing **CTRL** and clicking each item.
6. Click **>** to add the selected elements to the **Selected Elements** list. To remove an element, select it and click **<**.
7. Repeat step 4 through 6 to add other Dimensions and Attributes with their Elements.
8. Click **Next** or **Finish**. The Report Layout page is displayed.




9. In the **Available Attributes** list, select the metric(s) for the **Across Layout** and **Down Layout** lists, and then click **>**. Repeat for each metric to be added. To remove an element, select it and click **<**.
10. To sort the metric data in your layout, select the metric in **Across Layout** or **Down Layout** and click **up** or **down**.
11. In the **Metric/Attribute Description**, type description for your report. This will be displayed in the Content Area of the Portal.
12. Click **Finish**.

Field Code Changed

# Report History

Report History

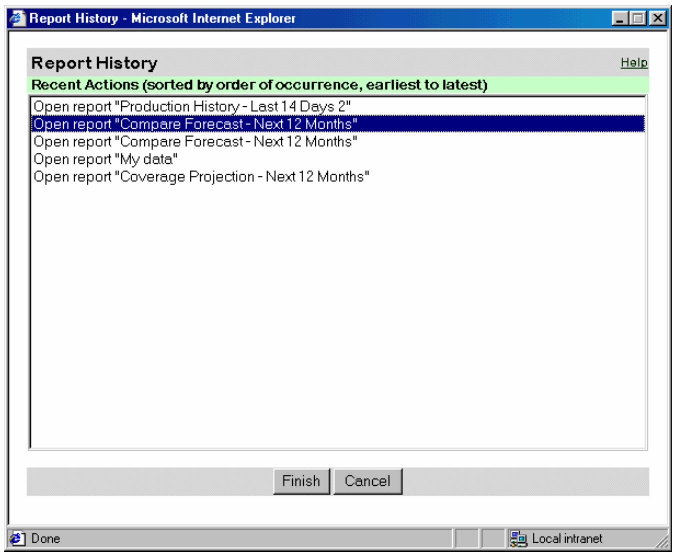
The Report History page displays a history of all the reports that were run since you have been logged into SageQuest.

Report History is logged whenever any of the following actions occur:

- Open Existing Report
- Create a New Report
- Format a Report
- Modify a Report
- Drill on a Report
- Surf on a Report

**To view report history**

1. From the Application Menu, click the **Report History** link. The Report History page is displayed.




2. Select the report to be viewed, and click **Finish**.

**Tip** Use this feature instead of clicking **Back** on your Browser.

# Add Link


The Add Link function allows you to add a hyperlink to the portal. This is extremely useful when you need to share a common web site or file that may be of interest to other users or groups.

**To add a link**

1. From the Application Menu, click **Add Link**. The Add Link dialog is displayed.


2. Type the name for the link. The name will appear in the Content Area of the portal and is searchable using the Search feature.
3. Type a description of the link. The description will appear in the Content Area of the portal and is searchable using the Search feature.
4. Type the fully qualified URL of the web page.
5. Click **Finish** to create the link. A link is created in your Inbox. From the Inbox you can open, move, copy, delete and publish the link.

**Note** If a link with the same name already exists in your Inbox, you will be prompt to enter a new name for the link or overwrite the existing link.

Field Code Changed

# Add File

The Add File function adds a file to the portal. You can add any file on your computer or local network. The file can be a Microsoft Excel spreadsheet, Word document, or image. Once you have added the file, you can publish it to other users or groups. Once the file appears in their Inboxes, they can read or download the file to their local drive.

If you do not see this option in the Application Menu, you do not have access to this feature. See your administrator to obtain access to this feature.

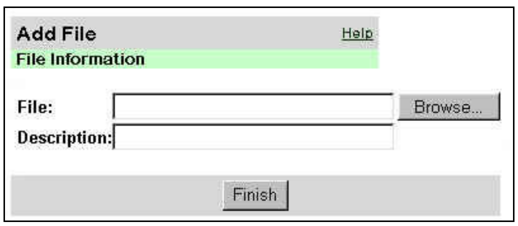
**Important** Do not upload a file larger than 2 MB. The operation will cancel the file upload if it takes too long (several minutes). This is usually due to uploading a large file over a modem connection.

Initially, the file is published only to you, with full permissions. To make it available to someone else, you will need to publish the file to other users or groups.

For more information on publishing document, refer to the Conent Area description, later defined in this chapter.

**To add a file**

1. From the Application Menu, click **Add File**. The Add File dialog is displayed.




2. Type the path and filename to be added to the portal.
   – Or –
   Click **Browse** to locate the file. The path and filename must be accessible from your local computer or network.
3. Type a description of the file. The description will appear in the Content Area of the portal and is searchable using the Search feature.
4. Click **Finish** to upload the file to the portal. A link to the file is created in your Inbox. From the Inbox you can open, move, copy, delete and publish the file.

**Note** Moving, copying and publishing will not create new copies of the file, but will create new links to the file.

# Help


The Help function gives you access to the online help. Click **Help** to view SageQuest's HTML help instructions. If you cannot find an answer to your question within the help system, you should do the following:

- Refer to the How do I...? chapter in this manual
- Email Technical Support

# Search


The Searh function provides you with basic search capabilities to find reports, links and any other content contained within the portal.

Use this function if you need to find a document, report, or file that has been published to you, but you don't remember exactly where it is located. The search results will be displayed in the Content Area in a standard file list format. You can sort the list, copy, or publish any of the items. You can also save the search. To run a saved search, click on its name.

**To search for a document, report, or file**

1. From the Application Menu, type the name, description, word, or phrase to search for in the **Search** field.
2. Select from the drop-down list the portal area where the information may be located.
3. Click **Search!**. The query results will be displayed in the Content Area.
4. To save your search results, type a name for the search and click . The search will be saved in your Inbox. You can then republish it to other users or channels.

**Note** Search results are not saved. Each time you click the search's name, the search will be rerun; if your files change, the results may be different each time you run the search.

Search parameters are described as follows:

| Parameter | Description |
|---|---|
| Content | SageQuest will search for the item, through all reports and documents that have been published to you via the portal and your corporate intranet. |
| Filenames | SageQuest will search for the item, through the reports and documents published to you via the portal. It will return all items that contain the specified word or phrase in their names. (Files on your corporate intranet will not be searched.) |
| Descriptions | SageQuest will search for the item, through the reports and documents published to you via the portal. It will return all items that contain the specified word or phrase in their description text. |
| Files & Desc | SageQuest will search for the item, through the reports and documents published to you via the portal. It will return all items that contain the specified word or phrase in their names and description text. |

# Advanced Search


The Advanced Search function allows you to search the contents of the portal and web sites based upon search collections defined by the administrator.

By using the Advanced Search Interface (ASI), you have more control over the search results than with the "quick" search function. You can use the ASI to search for content contained in a document, file, or collection of documents, which have been published to you.

**To search for items using the Advanced Search Interface**

1. From the Application Menu, click the **Advanced Search** link. Choose any of the following search parameters in the Advanced Search Interface and click **Search**. The query results will be displayed in the Content Area.
   - Select the document search parameters.
   - Type your search string text and select the search string result parameters and search words or phrase.
   - Select the file types to be search.
   - Select which folders and channels and their respective subfolders/subchannels to be searched through
   - Select the dates for the updated files.
   - Select how you would like your results to be displayed.

# Documents Search Parameters

You can specify the search string parameters for reports and documents contained within your folders and channels. Similarly, SageQuest will search your corporate intranet web page content, regardless of the paramters you choose. Depending upon the search parameters selected, your results will vary accordingly.

| Parameter | Description |
|---|---|
| File Names | SageQuest will search for the names of files and reports. |
| Descriptions | SageQuest will search for the text descriptions of files and reports. |
| Content | SageQuest will search through the names, descriptions, and content of all files and reports that have been published to you by other users. Furthermore, SageQuest will search through the content of any report, PDF file, HTML file, and Microsoft Word and Excel file. |

# Search String Text

You can select up to three separate text searches. For each search, you must specify the exact words to search and what type of search to be performed. Search string results parameters are described as follows:

| Parameter | Description |
|---|---|
| Must contain | SageQuest will only return files and reports that match the search text. |
| Should contain | SageQuest will search for documents that match the text phrase. Matches will not be required, but will be used to rank the relevance of the results; this is useful for modifying the results of another text search. |
| Must not contain | SageQuest will not return any files or reports that contain the search text. This is useful for narrowing the results from another text search. |

## Words or Phrase

Words and phrases are used to focus your search with tighter restrictions. For example, if you may submit three different text conditions, such as:

- The results *must contain* the **phrase** *Sales Report*.
- The results *should contain* the **words** *California 2000*.
- The results *must not contain* the **phrase** *Preliminary Report*.

In this example, SageQuest would search for all items that contain the phrase "Sales Report". It would exclude all of the files that contained the phrase "Preliminary Report". It would assign "relevance" ratings to the results based upon how well they matched the search requirements. Therefore, items contained in "California" and "1998" would get higher relevance scores.

Words and Phrase are defined as follows:

| Parameter | Description |
|---|---|
| Words | A document is considered a match, if it contains all the words in the text field, regardless of how they are arranged in the document. |
| Phrase | A document is considered a match, only if the words appear together in the document in the same order as you entered them in the search field. |

# Search only these File Types

You can specify what types of files should be searched. Files types are described as follows:

| Option | Description |
|---|---|
| All content | Search through all files and reports |
| Other documents | Search only through uploaded files and web links. This option only affects searches through reports and documents; it does not affect searches through your corporate intranet. |

# Search Folders and Channels

## Folders

You can specify which of your folders (and their subfolders) to search through.

- To search through all of your folders, select **all root folders** and select the all subfolders option. Initially, the list of folders will only show top-level folders. To add more folders, click **Add**.

This option only affects searches through SageQuest reports and documents. It does not affect searches through your corporate intranet.

## Channels

Similar to Folers, you can specify which of your channels (and their subchannels) to search through.

- To add channels to the list of channels, click **Add**.

This option only affects searches through SageQuest reports and documents. It does not affect searches through your corporate intranet.

# File Dates

You can limit the search by searching through files that were updated within a specified period.

- To do this, select one of the following criteria:

  Select the anytime option.
  Select a pre-defined update period.
  Select a date range.

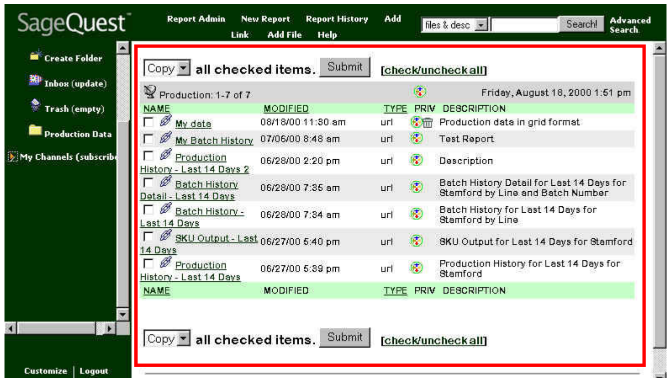
# How Results Should Be Returned

You can specify how the search results should be returned by selecting the following options:

- Specify the number of matches to be shown on each results page. (You will be able to page through the results to see additonal matches.)
- Specify whether the results should be sorted by relevance (how well they match the search parameters) or modification date. (Once the results have been returned, you can resort them by category.)
- Specify whether to display summaries of the matching web pages (for results from your corporate intranet).

Field Code Changed

# Content Area



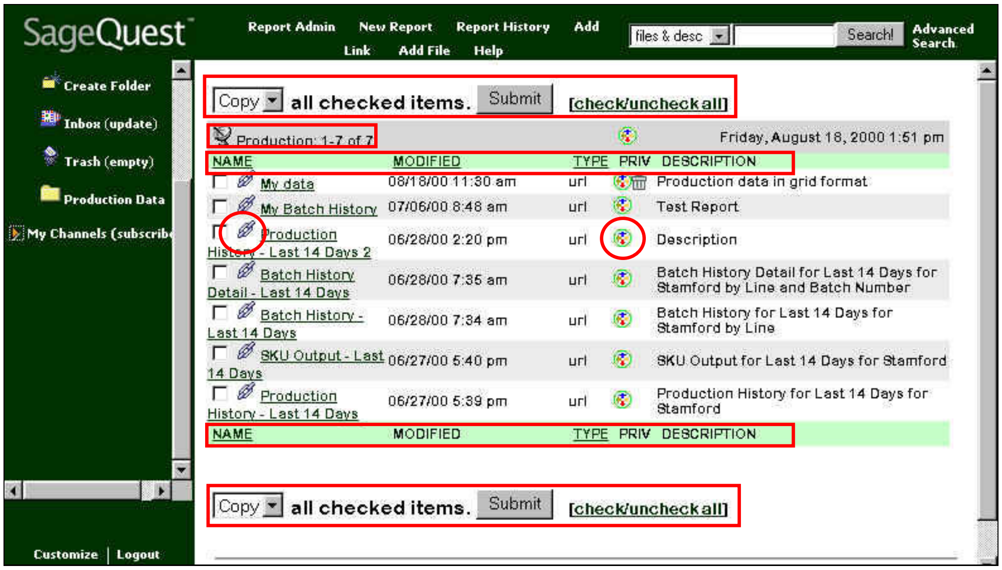

The Content Area is located at the right side of the Navigation Menu and below the Application Menu. This is where the contents of reports, documents, and statistics are displayed in the portal. The actual list of documents depends upon the view that you are using (for example, channels view, inbox, search mode, etc.).

SageQuest provides several options for viewing files. Depending upon your permissions, certain aspects of the document may or not be displayed.

The Content Area column headings lists the following:

- The document's name
- The date the document was last modified
- The type of document it is
- The document description
- What permissions you have for the document

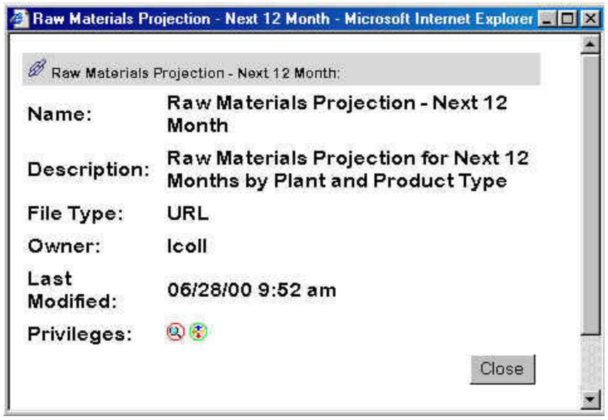
Each Content Area column is described later in this chapter.




The Content Area displays your reports, documents, and data in a consistant format. SageQuest uses a logical approach by sorting the information in columns. These columns are described as follows:

| Column | Description |
|---|---|
| Name | Lists the document, image, report, or link name. A checkbox is used select the item. Depending upon your privileges, you can then publish, copy, move, or delete the item.<br>An icon is used to visually represent the data type. Icons that my be shown are:<br> Represents the items is a bitmap image.<br> Represents the data is a link to a website or another document.<br> Represents items in the folder view.<br>Clicking on the any of these icons will display a property page for the item. |
| Modified | This column shows the date and time when the data was created or modified. If you received this data from another user, and it is updated locally on the originators computer, your file will not be updated to reflect the originators revisions. |

| | |
|---|---|
| Type | The Type column lists the three-letter file extension type of the data. Possible types are: URL, DOC, XLS, RPT. |
| Priv | Abbreviation for Privilages. Also known as permissions. Shows a graphical representation of your access privileges. For more information, see Permissions, later described in this chapter. To publish, view, delete, or edit an item, click the associated icon. For more information, see Chapter 3. |
| Description | This is the narrative text description that the owner entered for the data. |




# Sorting the Display

You can change the order in which files and items are displayed by clicking on any of the linked headings at the top or bottom of the columns. For example,

- To sort by names, click the Name heading (default).
- To sort by type of file or report, click the Type heading.
- To sort the items in ascending order, click the heading at the top of the column.
- To sort in descending order, click the heading at the bottom of the column.

# Permissions

Permission icons present a graphical view of a users access privileges. Permission icons are displayed under the **Priv** column

| Icon | Description |
|---|---|
|  | You have permission to publish the document to other users or groups. Click this icon to publish the selected document. |
|  | You have permission to delete the document from the SageQuest Sage repository. Click this icon to delete the selected document. (You will be asked to confirm the action.) |
|  | You have permission to edit the document. Click this icon to edit the selected document. |
|  | You have read-only permission to view the item. |

**Refer to** For more information on running reports, refer to Chapter 3.

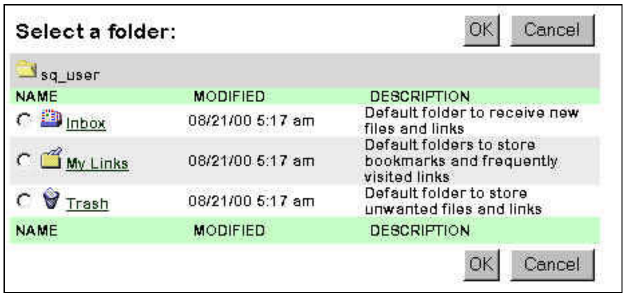
# Moving, Copying, and Deleting Items

This is a very simple and common task. You can move or copy items from one location to another, or delete items or channels from the portal, as long as you have the appropriate permissions.

**To move or copy an item**

1. Select the item(s) checkbox or to select all items in the folder, click **[check/uncheck all]**.
2. From the drop-down list, select one of the options below and click **Submit**.
   - Choose **Move** to move the selected items to another folder.
   - Choose **Copy** to make a copy of the selected items in another folder, while leaving the originals here.
   - Choose **Move** to trash to send the selected items to the Trash folder. The item will remain in the trash folder until it is emptied. If you accidentally delete an item, you can recover it by republishing the item.

Field Code Changed




**Move or Copy**: You are prompted to select the folder, where you want to move/copy the item. Select the appropriate folder and click **OK**.

**To move, copy, or delete a folder**

- Select the folder(s) checkbox and choose **move**, **copy**, or **delete**. Certain system folders, such as Trash or Inbox, can not be delected.

**Note** If you make a copy of a folder in the same location as the original folder, SageQuest will give the new folder a new name.

# Publishing Items and Folders

You can publish an item, or an entire folder, by clicking the Publish icon and selecting the appropriate permissions to the associated groups, users, and/or channels.

# Tools Menu


The Tools Menu is used to customize the portal interface. It allows you to change your password or exits you from the SageQuest program.

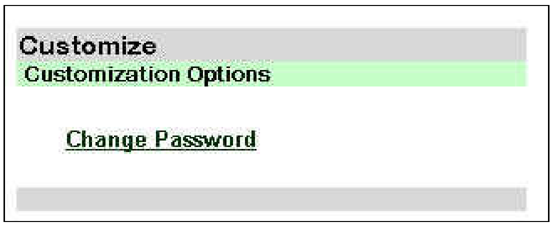
## Customize

Provides access to the following user customization options:

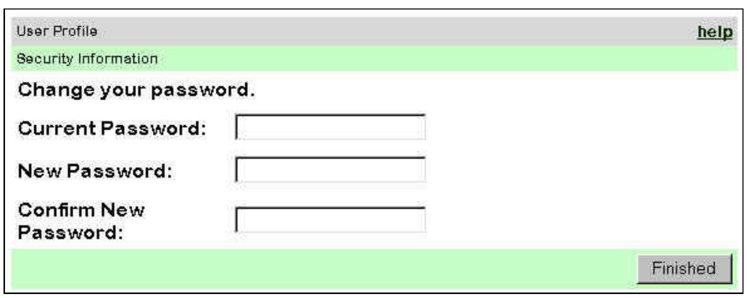
## Change Password

**To change a password**

1. From the Tools Menu, click **Customize**. The Customize dialog is displayed.




2. Click **Change Password**.




3. Type your password in the **Current Password** field.
4. Type your new password in **New Password** field. Type the new password again to confirm correct entry.
5. Click **Finished**. The change will take effect the next time you login to the SageQuest portal.

Field Code Changed

# Logout

Clicking **Logout** exits you out of whatever operation you are performing and returns you to the SageQuest login screen.

**Important** You cannot click your browsers **Back** button to return to your application. You must login again.