



Futrix Advanced Customization Workshop

Audience

This workshop is designed for administrators who want to customize and extend the Futrix Business Intelligence capabilities to specific user requirements.

Workshop Description

This one-day interactive workshop focuses on customizing and extending the capabilities of Futrix programmatically. It is focused on the specific needs of your site. Please discuss these with the course organizer.

Prerequisites

You should have attended the Futrix User and Administrator Training courses or have equivalent experience.

You should have a detailed knowledge of SAS and SAS Component Language (SCL) programming to gain maximum benefit from this course.

Objectives

When you have completed this course you should be able to:

Futrix Installation and Setup

- understand a Futrix implementation
- manage multiple Futrix applications from a single installation

General Customization Concepts

- customize/ extend the capabilities of Futrix
- alter the examples provided with Futrix

External/Custom User Databases

- link to external user databases such as Open LDAP, Microsoft Active Directory, SAS Metadata Server or a custom external user database
- synchronize users and user groups in an external user database
- set up a custom external user database

Custom Security

- understand the Futrix elements for which access restrictions can be added
- set up external security storage

Security Extensions – Single Sign On

- understand trust-based logins
- configuring Futrix to obtain authenticated User IDs

Menus

- replace the Futrix main menu
- add custom items into the Futrix administration menu

Custom Preferences

- add preferences to the Futrix environment
- use these preferences in custom routines

Futrix Elements

- refer to Futrix elements via both internal and custom IDs
- add custom attributes of Futrix elements
- alter the values of the custom viewpoint, dimension and measure attributes at run-time

Customizing and Extending Queries

- create measures via custom code
- create programmable meta-items that consist of coded logic, rather than a specified data source

Dynamic Metadata

- add a dynamic metadata meta-item
- register a dynamic metadata “report” in the menu

Custom Commands

- create Futrix commands that perform custom actions
- modify the way Futrix behaves by feeding back changes from custom commands
- make custom commands available to Futrix Web

Handles

- understand when specific handles execute during processing
- register custom code to execute at a user exit

Customizing Export Destinations and Styles

- understand Futrix export and publishing architecture
- understand how to develop custom export styles

Web Skins

- create new custom skins
- edit and create new skin areas
- define custom variables and custom links

Linking Directly to Web Dashboards and Viewpoints

- create a link from web pages outside of Futrix directly into a specific dashboard, viewpoint or meta-item within Futrix
- create a custom identifier for a viewpoint for referencing rather than the internal Futrix ID
- link directly to Futrix administration analysis web pages

Advanced Use of Tracking Data

- understand the different types of tracking data sets
- understand the structure and inter-relationships between tracking data sets
- create new analysis data sets for custom analysis

Resolution of SAS Macro Variables

- understand the different places macro variables can be resolved in Futrix
- assign a macro variable