Logi Ad Hoc Management Console Overview

Version 11
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INTRODUCTION

The Logi Ad Hoc Management Console is the primary management utility for the centralized administration of all Ad Hoc Reporting instances. As such, it is version specific and allows the System Administrator to:

- Create and Configure Ad Hoc Reporting instances
- Upgrade Ad Hoc Reporting instances to the installed version
- Remove Ad Hoc Reporting instances
- Exercise various utilities related to an Ad Hoc Reporting instance
- Review Help information
- Contact Support

This Overview covers the usage of the Logi Ad Hoc Management Console utility (referred to as "**the MC**" throughout this document). The following information is included in this document:

- System Requirements
- Management Console Overview
- Configuration Wizard Overview

Helpful Terminology

The "Management Console" (MC) is a desk-top application used to create, configure and manage Ad Hoc instances.

An "Instance" or "Ad Hoc instance" is a web application that allows users to create, manage and run reports.

"Metadata" is a database core to an Ad Hoc instance that stores information about reports, schemas, users and roles. No actual customer data is stored in a metadata database.

"Active Instance" is the Ad Hoc instance that is currently being managed with the MC.

"Active Connection" refers to the reporting database that is currently being managed with the MC.

"Configuration Wizard" is a wizard that can lead the System Administrator through the steps necessary to create and configure most of the features of an Ad Hoc instance.

Target Audience

This overview is intended for a system administrator and/or database administrator that are new to Ad Hoc. The successful configuration of the application requires knowledge of networking and database technologies. For additional technical documentation for this or any other Logi Analytics product, please visit our web site at http://www.logianalytics.com/support/.

System Requirements

The MC requires the following components installed server-side:

- Windows 2003+
- Microsoft Internet Information Services (IIS) 6.0+
- Database(s) for source data
- Database(s) for metadata
- Microsoft .NET Framework 4.0
- Java runtime environment 6.0+ *

* This component is not included as part of the installation of the MC. For certain features of Logi Ad Hoc Reporting to function properly, this must be installed both server-side and client-side.

The MC also may require the following:

- Administrative credentials for the Windows Task Scheduler
- Administrative access to an SMTP server

Supported Source Databases
The MC supports the following databases for reporting:

- Microsoft SQL Server
- Oracle
- Sybase*
- MySQL
- DB2*
- Informix*
- PostgreSQL

Note:

Ad Hoc will generate SQL statements to query the reporting database. An attribute in the _Settings.lgx file controls the type of SQL statements (Simple SQL vs. Active SQL). DB2, Informix and Sybase are not supported when using Active SQL.

Supported Metadata Databases
The MC supports the following metadata databases:

- Microsoft SQL Server
- Oracle
- SQL Server CE
- MySQL

Management Console Overview

Purpose

The MC is designed as a central management facility for Logi Ad Hoc Reporting (referred to as "Ad Hoc" for the remainder of this document). From the MC, the system administrator may create, upgrade or remove instances of Ad Hoc on the same server and configure instances, perform diagnostics, repairs, and cleanup archives related to an instance across the platform.

General Design and Usage

The MC has been designed to manage instances of Ad Hoc across platforms and to integrate existing configuration tools into a single, centralized management facility.

One of the functions of the MC is handling upgrades to newer versions. The MC accomplishes this goal by being **version specific**. As part of the installation process (see the "Installation Guide") the default program group and physical installation folder both contain version references.

When the MC is used to create a new instance of Ad Hoc, that instance will be created as the same version as the MC. When the MC is used to upgrade an instance of Ad Hoc, that instance will be upgraded to the same version as the MC.

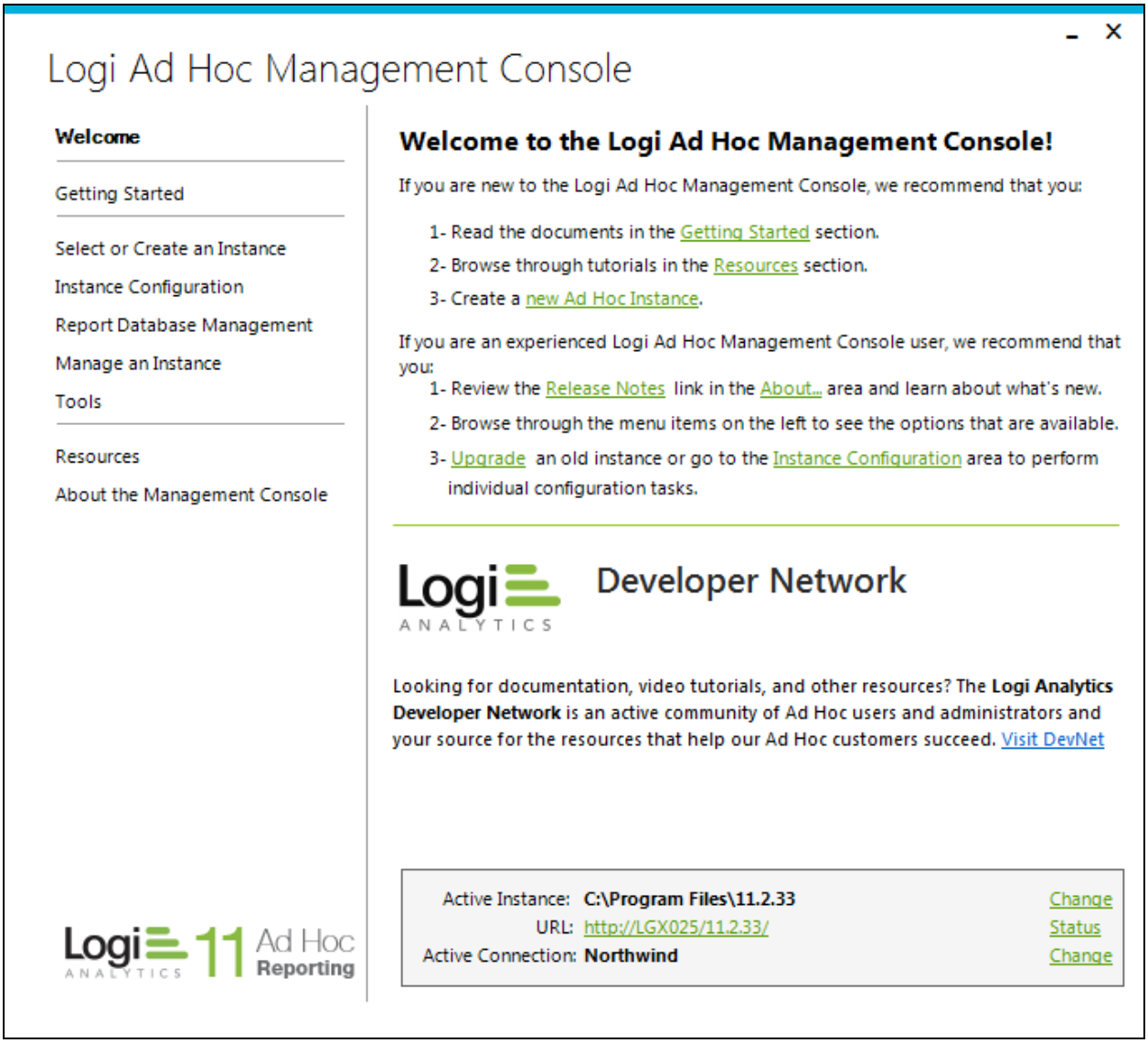
Note:

Due to variations in metadata structure and report definitions, Ad Hoc versions are NOT backward compatible.

Overview of the Management Console Interface

The MC interface is divided into three main panels.

On the left is the Action Group panel. At the bottom right is the Target panel. At the top right is the specific Actions panel.



Action Group Panel

The Action Group panel generally presents a logical grouping of actions that can be performed on an instance. Brief descriptions of the Action Groups follow:

Welcome – the Welcome Action Group is the initial Action Group selected when the MC is launched after installation. It is intended to orient new users and guide them through their first experience with the MC or to let experienced users know what is new in this version of the MC.

Getting Started – the Getting Started action group provides links to helpful documentation and information for the new user. It also provides a launch point for the Configuration Wizard which will lead the new user through the process of creating an Ad Hoc instance.

Select or Create and Instance – this action group, as its name implies, provides tools to locate an existing Ad Hoc instance or create a new instance.

Instance Configuration – this action group provides tools to configure features related to an instance of Ad Hoc. The Configuration Wizard pulls together many of these tools into a single wizard (documented below). Configurable features include the connection to the metadata database, various application settings, report database connections, scheduling, email notification, archiving and event logging.

Report Database Management – each Ad Hoc instance may have connections to multiple reporting databases. This action group provides tools to establish the connection to a reporting database, import the schema, categorize the data objects and import existing relationships.

Manage an Instance – this action group provides tools to upgrade, backup/restore or remove an existing Ad Hoc instance

Tools – this action group provides tools to get reports into an instance from other Logi Analytics applications. Publishing is the technique to provide access to Managed Reporting reports. Synchronization is the technique to make reports from an Ad Hoc instance available. In addition, report management, application internationalization, diagnostic and cleanup tools are provided.

Resources – this action group provides helpful links to online documentation, videos and the Support portal. All of these options are intended to provide answers to questions related to using the product.

About the Management Console – this action group provides links to version information, release notes, and the Software Usage License Agreement.

Target Panel

The Target panel identifies the active instance that the focus of all of the Management Console functions. It also identifies the active reporting database for those related functions.

From the Target panel, you can change the active instance and the active connection as well as launch the Ad Hoc instance and the Upgrade Manager.

Note:

The Target panel is not visible initially after a new install of the Management Console since there are no “active” instances at that point.

Note:

The Management Console retains information about the last instance and reporting database connection used. This information appears in the Target panel when the MC is launched.

Actions Panel

The Actions panel will change content depending on the Action Group selected. All of the functions of the Management Console are invoked through options presented in the Actions panel.

Configuration Wizard Overview

Although the primary purpose of this document is to provide an overview and understanding of the Management Console, it also serves as a quick "getting started" guide. Typically the first action a System Administrator will want to perform is the creation and initial configuration of an Ad Hoc instance. The best mechanism for a new user of the MC to accomplish this task is to invoke the Configuration Wizard and complete the core requirements for a working Ad Hoc instance.

The core requirements for an Ad Hoc instance are:

1) Create the physical folder structure and populate it with the Ad Hoc application files
2) Create the virtual directory in the web server
3) Connect the new instance to a reporting database and
4) Import all or part of the schema into the metadata database

Once the core requirements have been satisfied, the System Administrator can login to the Ad Hoc instance and either create and run reports or continue the configuration of the instance. The continued refinement of the Ad Hoc configuration is outside the scope of this document. This document is intended to be an overview and quick start guide.

For detailed usage of the Management Console, refer to the *Management Console Usage Guide*. For detailed system administration of an Ad Hoc instance, refer to the *System Administration Guide*. Configuration and management of reporting database is discussed in the *Database Administration Guide*. All three of these guides are distributed with the Management Console. In addition, they can be found by going to Online Ad Hoc Documentation.

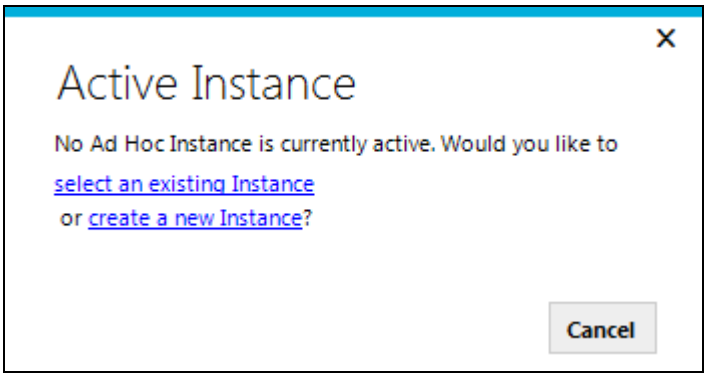
To invoke the Configuration Wizard, click on Getting Started/Configuration Wizard, Welcome and the Configuration Wizard link, or **Instance Configuration/Configuration Wizard.**

The remainder of this section will present an overview of the steps necessary to complete the core requirements necessary for an Ad Hoc instance using the Configuration Wizard for the first time. Keep in mind that each of the steps presented in the Configuration Wizard are also available through the individual Actions.

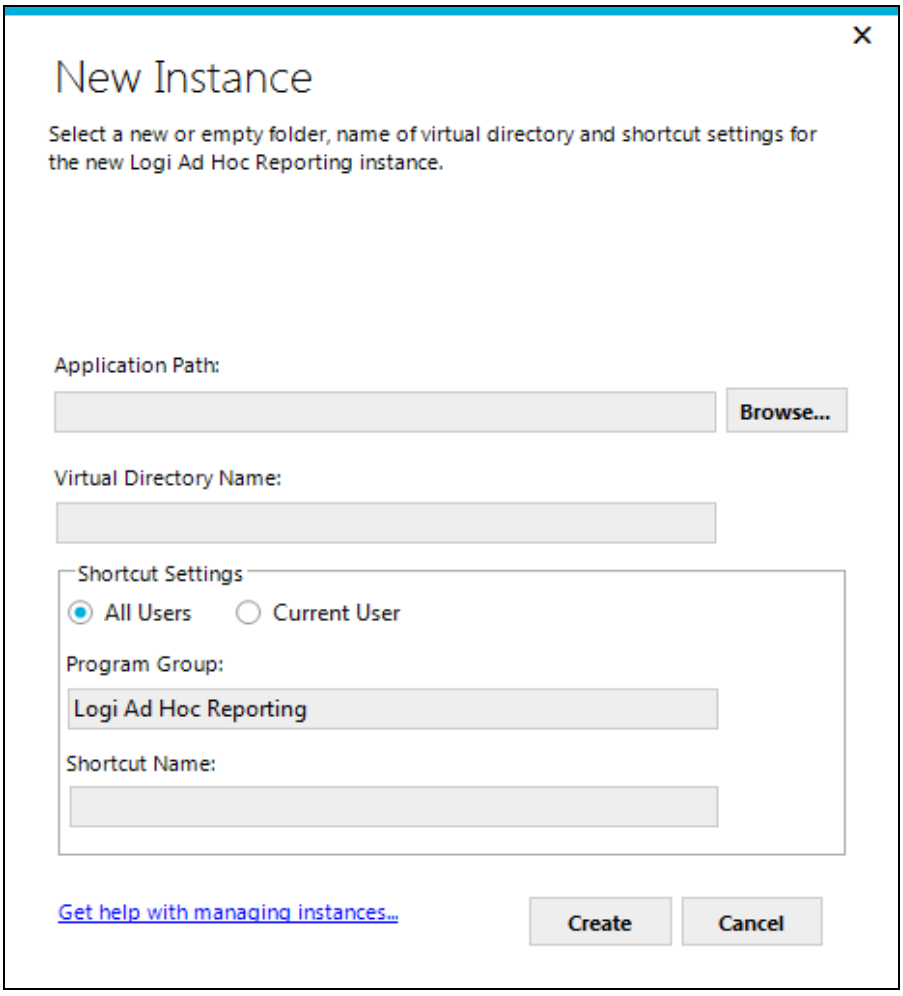
Note:

The **Configuration Wizard** may present different dialogs depending on the situation and what is trying to be accomplished. For example, if the **Configuration Wizard** is being used to modify an existing instance, none of the "**New Instance**" dialogs will be presented.

After launching the **Configuration Wizard**, the following dialog may be presented, particularly if this is the first attempt to create an Ad Hoc instance.



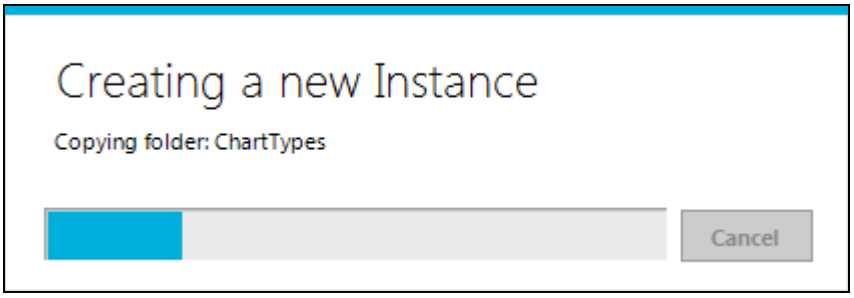
Click on the "**create a new Instance**" link to continue the process. If the above dialog is not presented, the following **New Instance** dialog will be. The two key pieces of missing information in this dialog are the physical folder destination (**Application Path**) of the new instance and the V**irtual Directory Name**. Both are required to establish a new Ad Hoc instance.



To specify the **Application Path**, click on the **Browse** button and navigate to the parent folder where you would like the instance folder to be created. Click on the "**Make New Folder**" button and enter the folder name. Click on the **OK** button to confirm the path and folder information.

To specify the **Virtual Directory Name**, simply enter the name in the provided text box.

Click on the **Create** button when the required information has been specified. A progress indicator dialog will be presented, similar to the following:

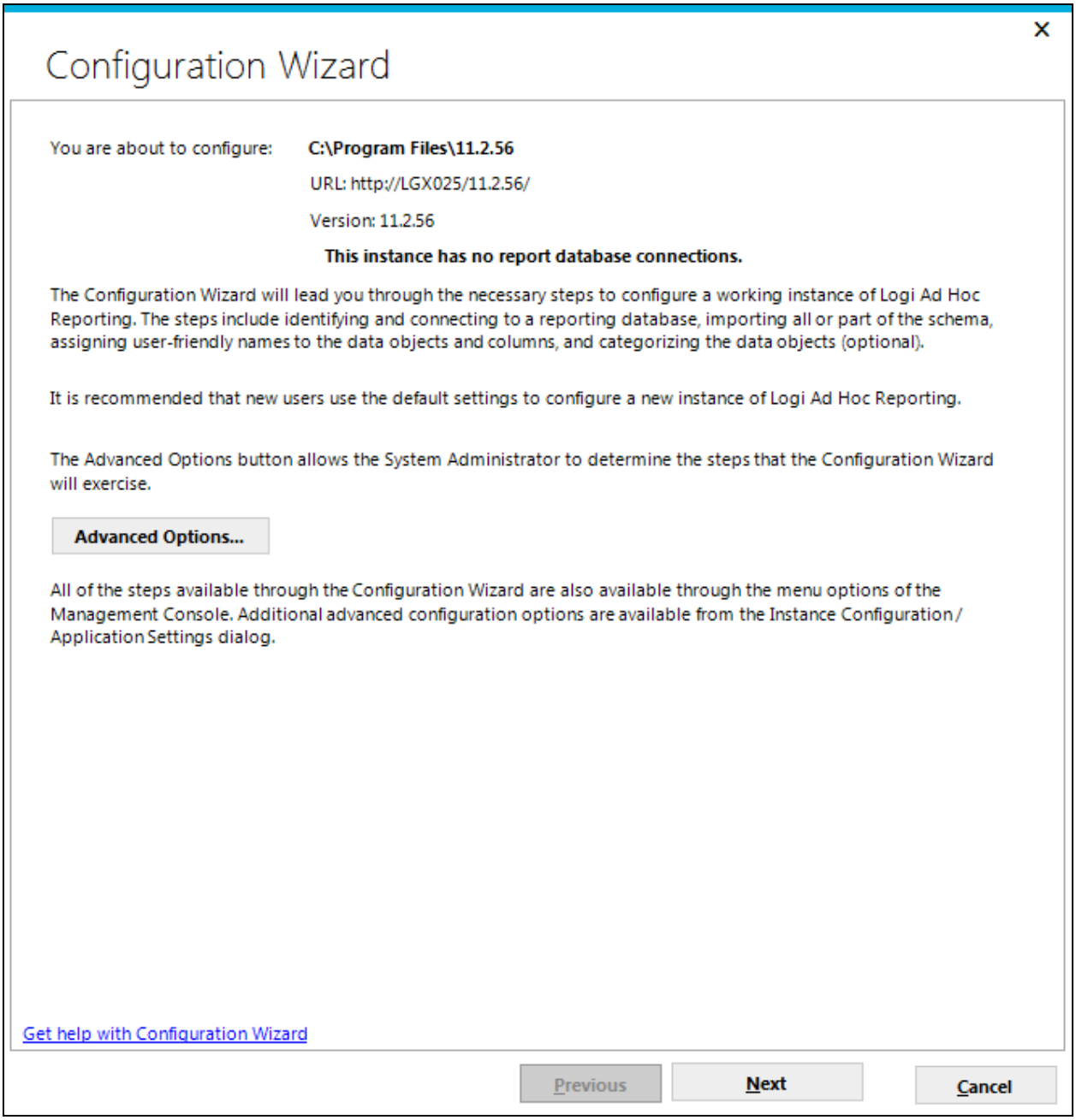


In the background, the MC is creating the Ad Hoc instance folders and populating them with the appropriate files and code to establish an instance. The source information for the folders and files is the MC folder/file structure itself.

In addition, the MC creates the virtual directory and the named shortcuts.

Once this process is complete, the first two core requirements for establishing an Ad Hoc instance will have been accomplished. The physical folder structure and virtual directory will have been created.

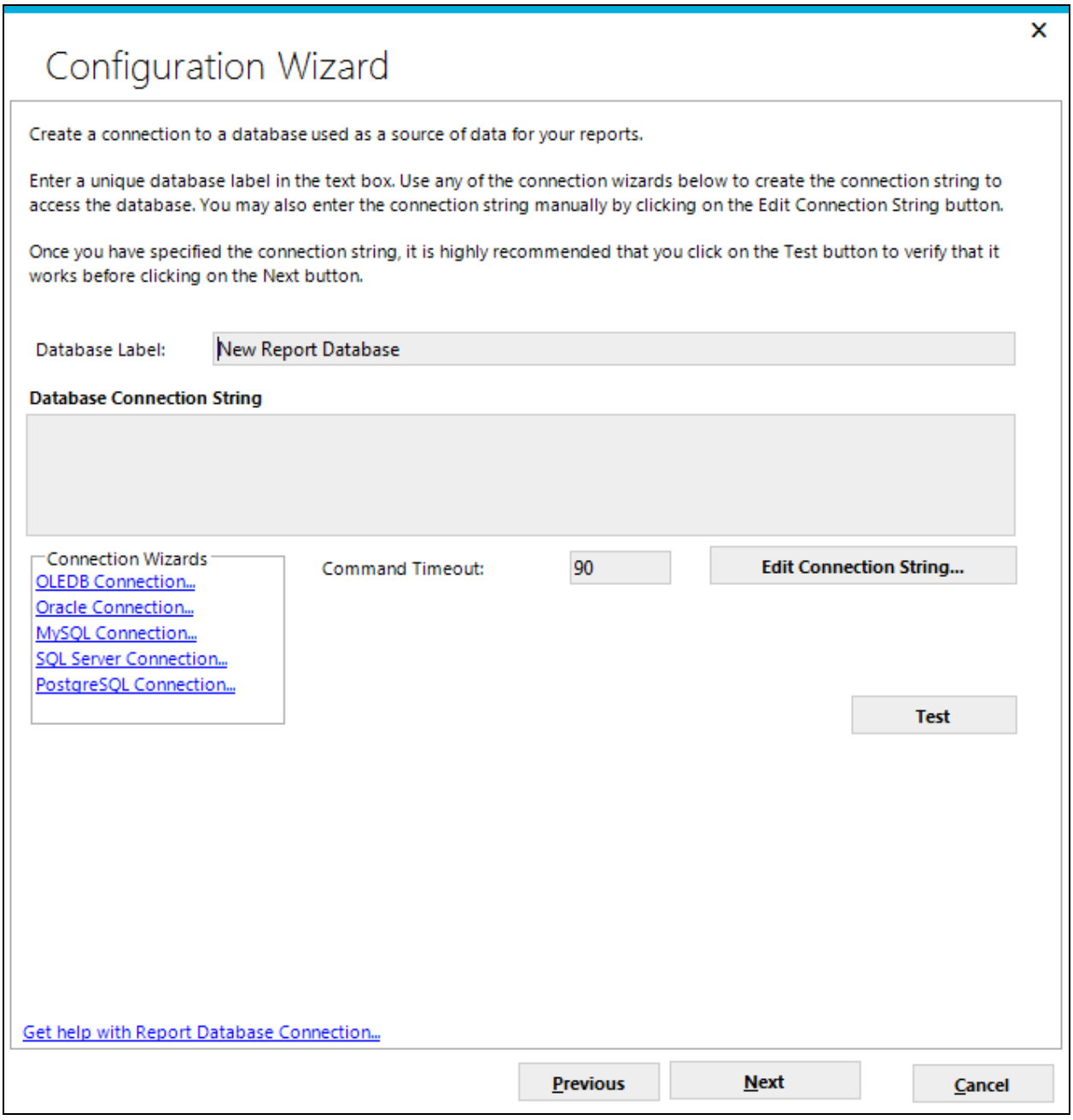
The next dialog presented is actually the first formal dialog of the Configuration Wizard. This dialog will be presented every time the Configuration Wizard is launched.



The **Advanced Options** button allows the System Administrator to pick the configuration options that the **Configuration Wizard** will lead them through. Since this overview is presenting the minimum steps required to establish an Ad Hoc instance, the default configuration options will suffice.

Click on the **Next** button to through the wizard.

The **Report Database Configuration** dialog will be presented. With this dialog and the related, subordinate dialogs the goal is to provide a friendly name for the reporting database and build the connection string to access the database.

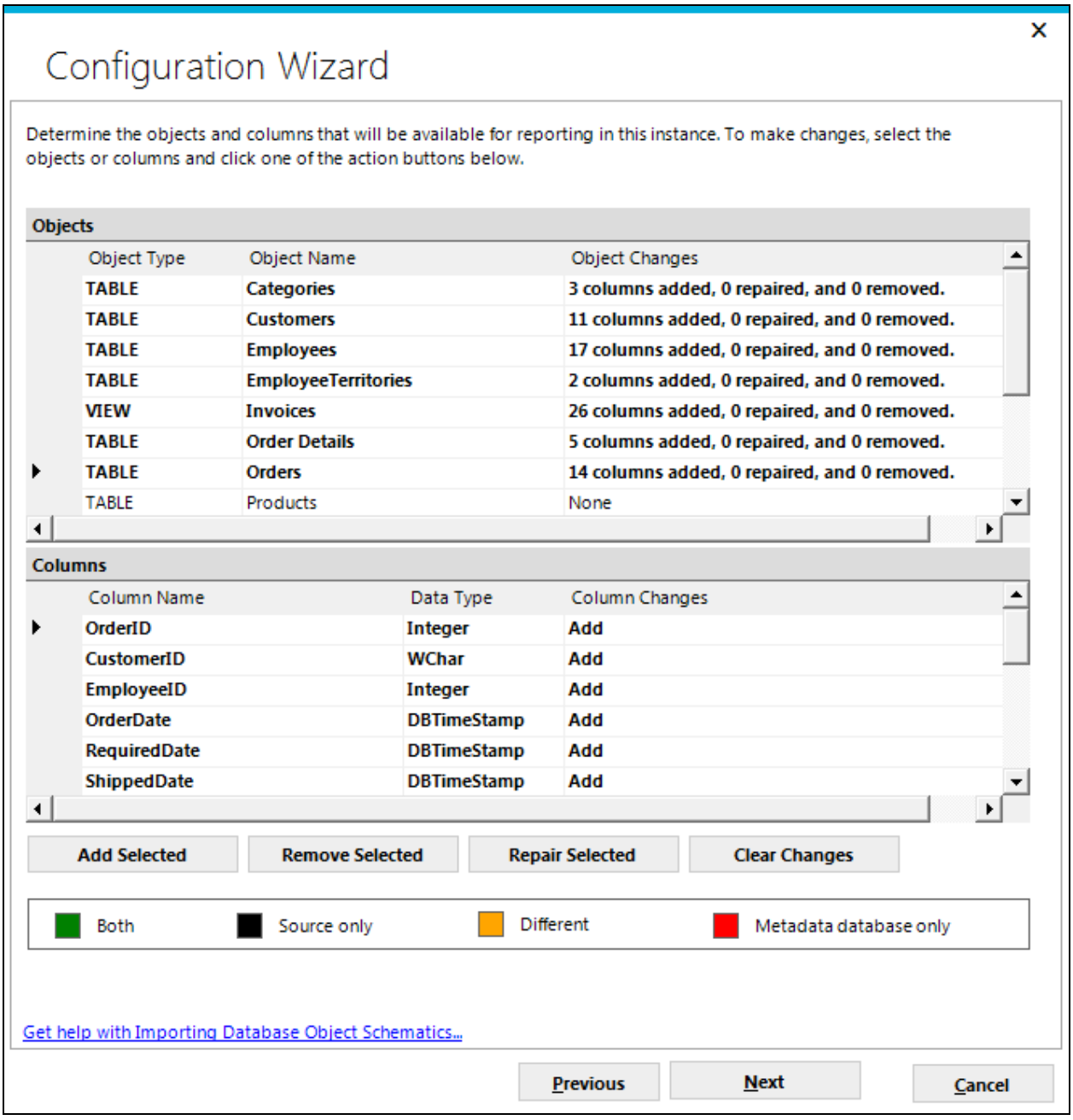


The combinations of databases and providers are too extensive for this discussion. The System Administrator will be required to select a data provider, identify the database and provide credentials to access the database.

When a complete database connection string has been specified, it is advised that the connection is verified by clicking on the **Test** button.

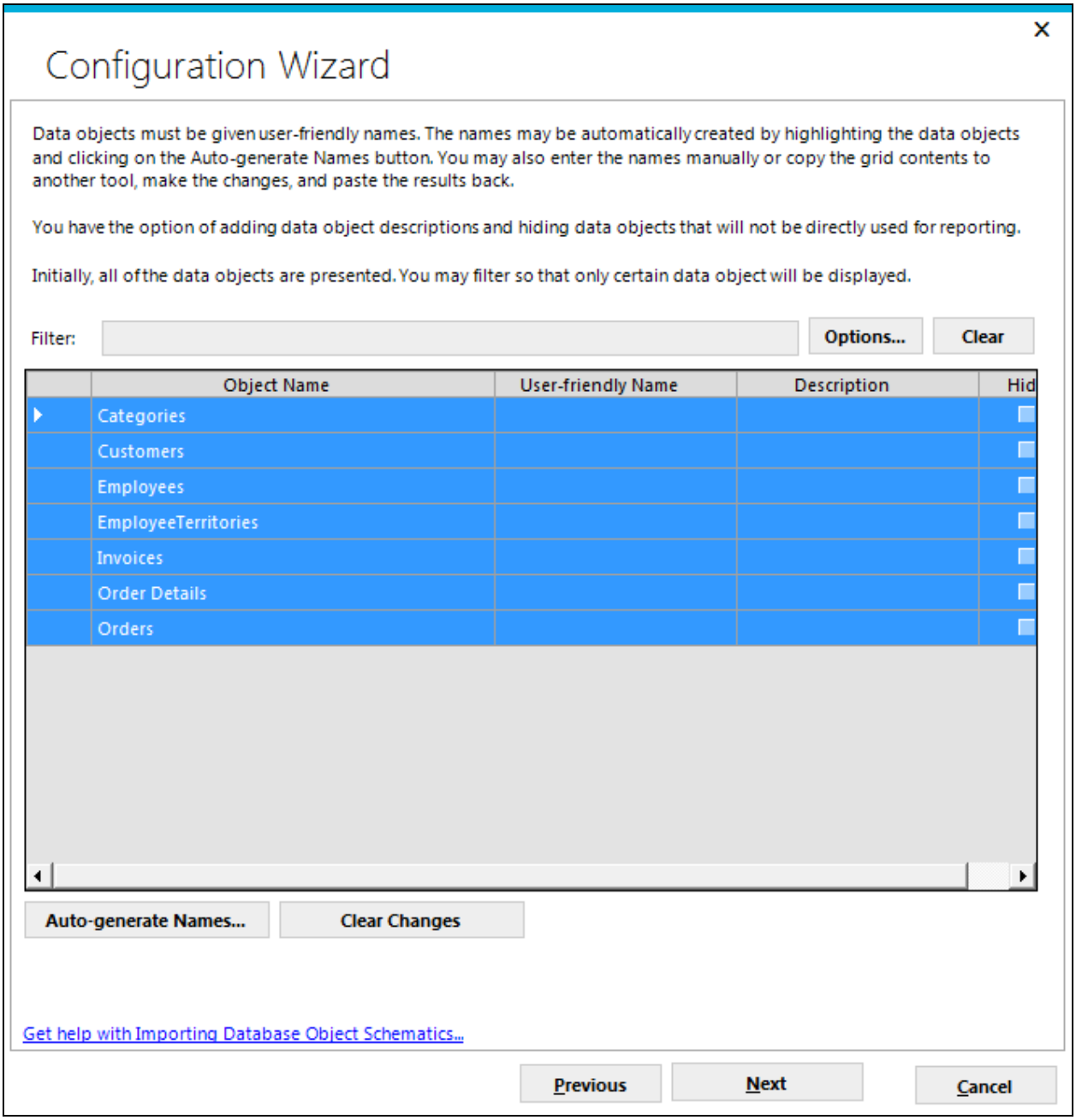
When the test is successful, the third of the core requirements is complete. A connection to a reporting database will have been established.

Click on the **Next** button to begin the process of importing the reporting database schema. The **Object and Column Schema Import** dialog will be presented.



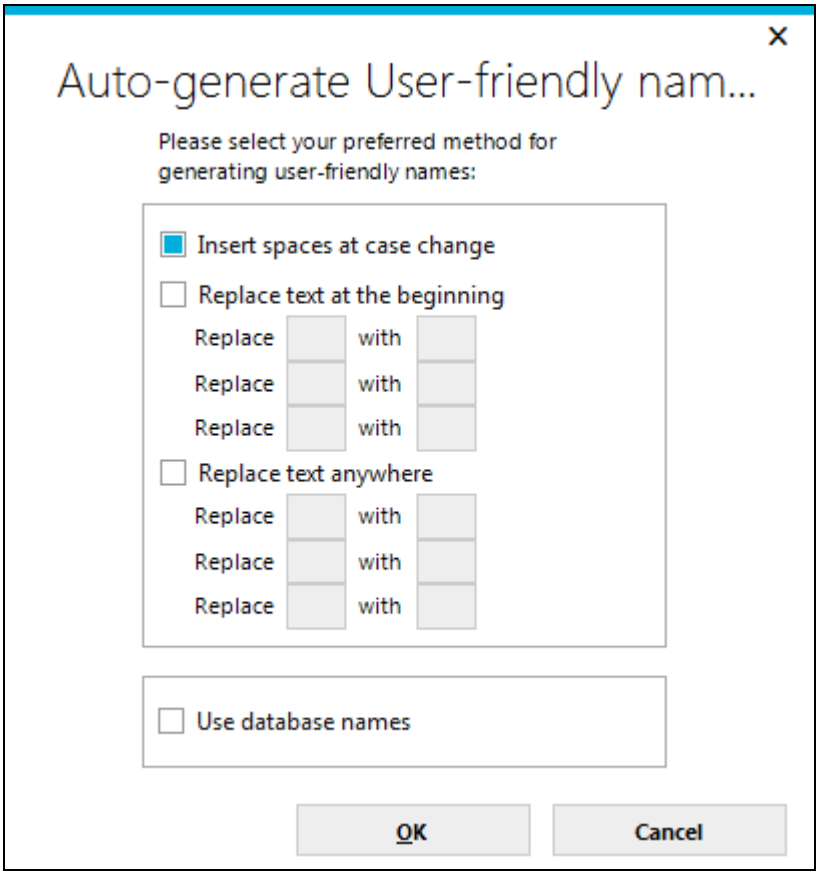
Highlight the Objects (tables and views) that are necessary for reporting and click on the **Add Selected** button. The selected items will be bolded in the dialog. Click on the **Next** button to continue.

The Object Names and Descriptions dialog is presented. Creation of “friendly” labels is required as part of the configuration process.



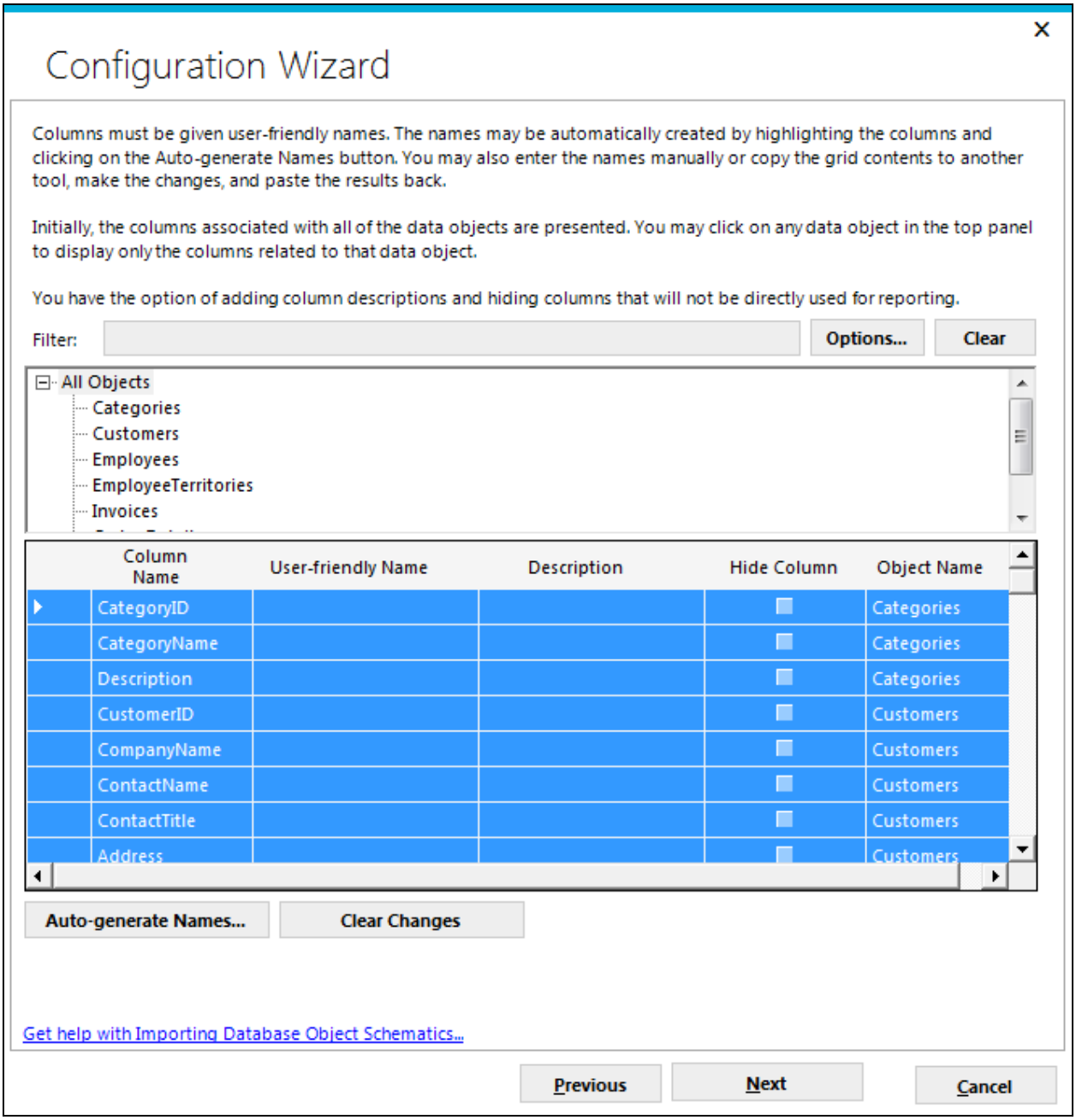
Click on the upper right corner of the grid to highlight all of the objects. Click on the **Auto-generate Names** button to let the MC set the names automatically.

The Auto-generate Friendly names dialog will be presented. The two most frequently used options are “Insert spaces at case change” and “Use database names”.



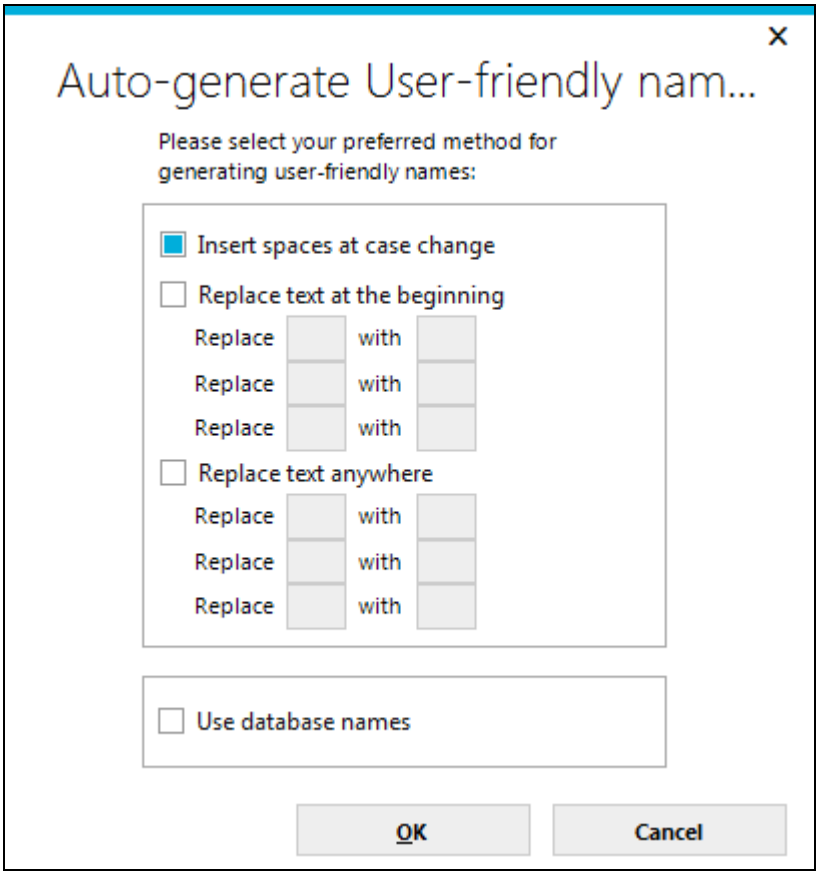
Click on the checkbox for an option, provide any additional information necessary, and click on the **OK** button. After reviewing the generated friendly object names, click on the **Next** button to set the names and descriptions of the columns.

The Column Names and Descriptions dialog will be presented. “Friendly Labels” must be specified for each of the columns.



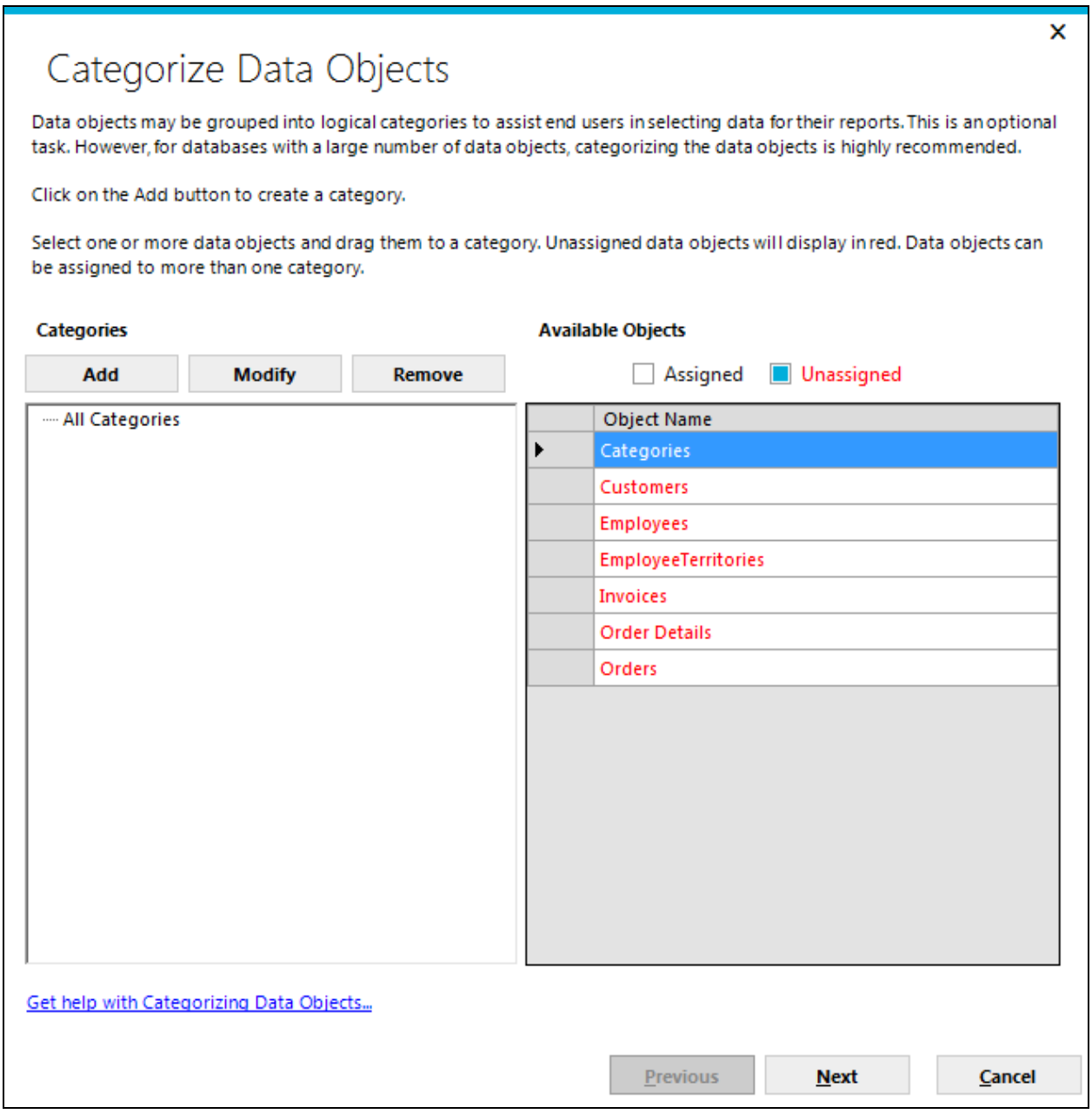
Click on the upper left corner of the grid to highlight all of the columns and then click on the **Auto-generate Names** button to let the MC set the names automatically.

As with the Objects, the Auto-generate Friendly names dialog will be presented. The two most frequently used options are “Insert spaces at case change” and “Use database names”.



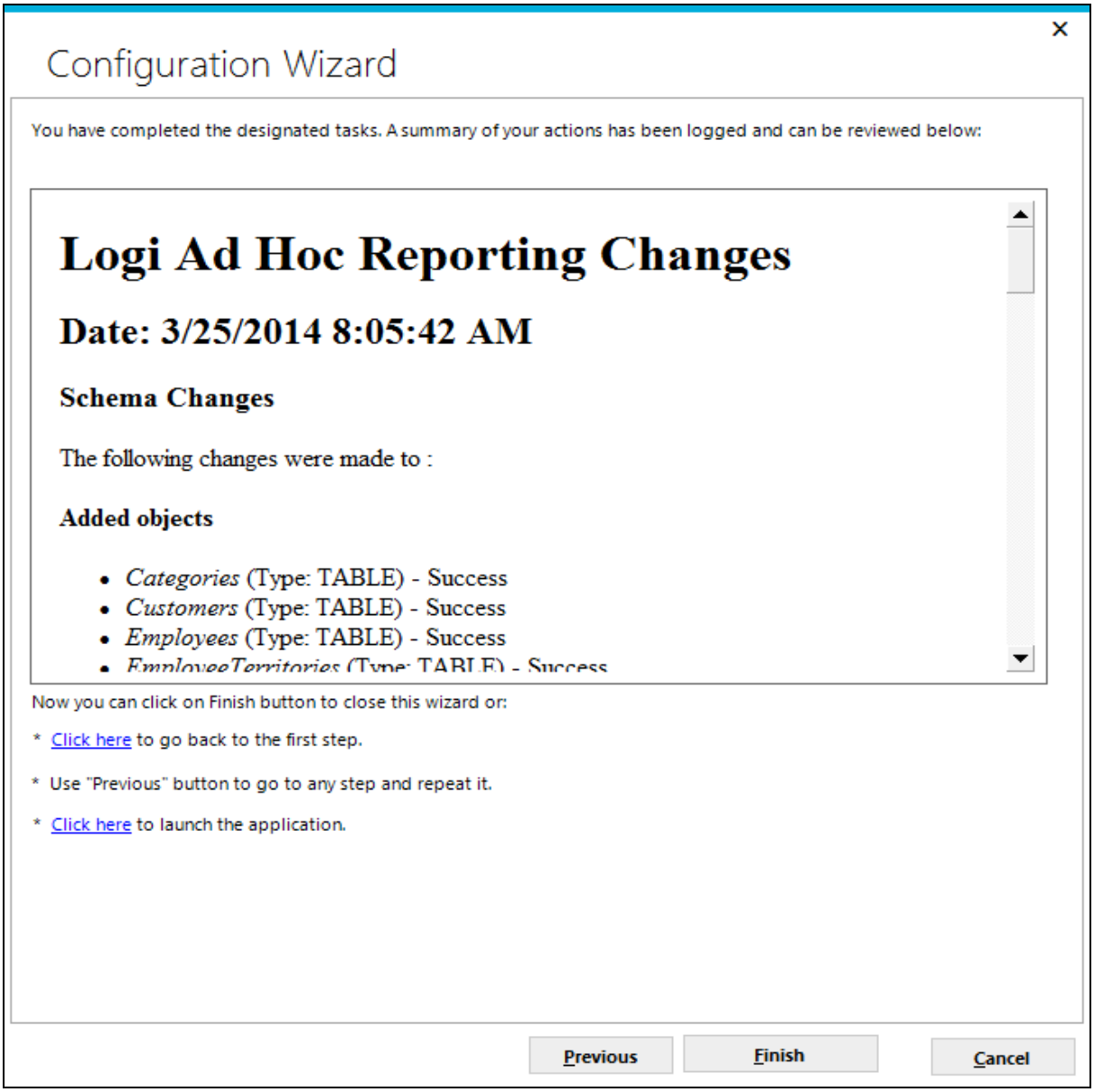
Click on the checkbox for an option, provide any additional information necessary, and click on the **OK** button. After reviewing the generated friendly column names, click on the **Next** button.

The **Categorize Objects** dialog may be presented if over 50 objects are included in the schema. Although it is not necessary to group objects into categories, for installations with large numbers of objects it can be beneficial to present categories of objects to the end user rather than a long list of possibly unrelated objects.



For this initial introduction to the **Configuration Wizard**, click on the **Next** button to bypass creating categories and assigning object to them.

At this point the minimum configuration requirements for an Ad Hoc instance have been met. The **Finish** dialog presents a report of the configuration changes.



Click on the **Finish** button to dismiss the Configuration Wizard.

Note:

Once an Ad Hoc instance has been created and a reporting schema has been established in the metadata database, the instance may be accessed by clicking on the URL displayed in the Target Panel. The default login user name and password are "Admin" and "password". *It is highly recommended that the administrator change the password on the initial login.*

CONTACT US

For more information about other Logi Analytics products or assistance beyond this user manual, please contact Logi Analytics in the following ways:

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