Logi Ad Hoc Reporting
Alternate Preview Configuration Guide

Configuring a Report Database Preview Features

During a report's creation and modification process, users frequently like to view their progress, verify the data returned, and ensure that the presentation technique is relevant to the purpose of the report. This is accomplished by means of the Ad Hoc Report Builder's preview features (e.g., Preview Report, Live Preview).

For companies with large production databases, frequent previews can be slow and/or impact the performance of other transactional applications that use the same database. Such companies may wish to use one of the following two methods in order to minimize that effect:

- Restrict the number of detail records returned to facilitate report creation/modification time.

- Use an alternate reporting database for the previews to eliminate the impact on the production services .The structure of the alternate reporting database must mimic the production database schema but likely has fewer records.

Therefore, a report database may be configured such that end-users preview a report from the Report Builder based on the data from:

1. The report database - this is the default configuration.
2. The report database with a limit set on the number of detail records displayed in the report (i.e., 25 records).
3. An alternate report database - this is helpful when the report database is very large and a quicker response time is desired in displaying the report preview.

> **Notes:**
> Only one method may be configured for a single report database connection.
>
> If the application is configured with more than one report database connection, then a different method can be configured for each connection.
>
> Configuration of alternate preview methods requires the manual editing of the instance's `_Definitions/_Settings.lgx` file. It's advisable to make a backup copy of this file prior to editing it.
>
> In addition, verify that you are editing the settings file in the proper Ad Hoc instance folder. For installations with multiple Ad Hoc instances and a similar Management Console folder structure, it's relatively easy to make the adjustments to the wrong file.

Limiting the Number of Detail Records

To limit the number of records returned in report previews, the settings file must be manually edited to add two attributes to the database constants associated with the reporting database:

1. Open the `_Settings.lgx` file in a text editor, such as Notepad.

2. In the **Connections** element, locate the Report Database connection to which the setting will be applied and identify its ID (e.g., **21**). For example:

   ```
   <Connection ID="21" CommandTimeOut="90" Label="Adventure Works"
   ConnectionString="Provider=SQLOLEDB.1;Password=#;Persist Security
   Info=True;User ID=sa;Initial Catalog=AdventureWorks;Data
   Source=ADHOCTEST" Type="Application" ahDBType="SQLSERVER" />
   ```

3. In the **Constants** element, locate the constants attributes for the Report Database connection identified in the prior step (DB-21) and add the two attributes highlighted in the example below. Replace the value 25 with the desired number of detail records.

   ```
   <DB-21 SchedulingPdfEmail="c:\program files\logixml ad hoc report
   builder\ahEmail\Attached.htm" SchedulingArchiveEmail="c:\program
   files\logixml ad hoc report builder\ahEmail\Archived.htm" Subject=""
   Scheduling="False" Archival="False" ArchiveFormat="HTML"
   ArchivePhysicalPath="" ArchiveWebPath="" FromEmailAddress="" CC=""
   BCC="" PreviewMethod="LimitRow" PreviewAttribute="25" />
   ```

4. Save the file.

5. Access the application and confirm that the preview features have been properly configured.

When a user creates or modifies a report, the following message will appear at the top of the report preview:

> Preview data is a subset of the actual data.

When the report is previewed it should be rendered with no more detail records than the number specified in the Constants attribute.

Using an Alternate Reporting Database

To use an alternate reporting database for previews, an alternate database must have been created and configured for this purpose. The schema of the alternate reporting database must match that of the production database. The alternate reporting database is not required to reside on the same server.

The configuration process requires that a connection to the alternate reporting database be established in the instance's settings file and then related back to the production reporting database by adding two attributes to the constants associated with the production reporting database.

Note:
In the process of establishing and testing the connection to the alternate reporting database, the Management Console will offer to import the schema of the new connection into the Ad Hoc metadata. This is *not* necessary since the alternate database is a mirror of the production database and the schema of the production database already exists in the metadata database.

To configure an alternate reporting database for previews:

1. *PREREQUISITE*: An alternate database must be configured with a schema *identical* to that of the production/redirected database. We highly recommended that the alternate database contain substantially less data.

2. In the Management Console, build a Report Database connection to the alternate database with a label of "Alternate DB". To create a report database connection:

    a) Click the **Report Database Management** action group.

    b) Click the **Report Database Connections** action.

    c) Consult the *Management Console Usage Guide* for the details of creating a report database connection. Do not import the schema of the alternate reporting database if prompted - it isn't necessary.

    d) Click **Test** to verify the connection, on the **Report Database Connections** dialog box.

    e) Exit the Management Console.

3. Open the `_Settings.lgx` file in a text editor, such as Notepad.

4. In the **Connections** element, locate the Report Database connection to which an alternate preview database connection will be applied and identify its ID (e.g., **21**). Example:

```
<Connection ID="21" CommandTimeOut="90" Label="Adventure Works"
ConnectionString="Provider=SQLOLEDB.1;Password=#;Persist Security
Info=True;User ID=sa;Initial Catalog=AdventureWorks;Data
Source=ADHOCTEST" Type="Application" ahDBType="SQLSERVER" />
```

5. In the **Connections** element, locate the Report Database connection of the newly created "Alternate DB" connection, copy it, paste/insert the copy in a new line directly below the original and change the copy's ID (e.g., **21**) to a non-numeric ID (i.e., **Alt1**):

```
<Connection ID="Alt1" CommandTimeOut="90" Label="Alternate DB"
ConnectionString="Provider=SQLOLEDB.1;Password=#;Persist Security
Info=True;User ID=sa;Initial Catalog=AlternateAdventureWorks;Data
Source=ADHOCTEST" Type="Application" ahDBType="SQLSERVER" />
```

6. In the **Constants** element, locate the constants attributes for the Report Database connection identified in Step 4 and add the two attributes highlighted in the following code. Replace the value **xxxx** with the ID of the alternate database connection created in Step 5 (i.e., **Alt1**):

```
<DB-21 SchedulingPdfEmail="c:\program files\logixml ad hoc report
builder\ahEmail\Attached.htm" SchedulingArchiveEmail="c:\program
files\logixml ad hoc report builder\ahEmail\Archived.htm" Subject=""
Scheduling="False" Archival="False" ArchiveFormat="HTML"
ArchivePhysicalPath="" ArchiveWebPath="" FromEmailAddress="" CC=""
BCC="" PreviewMethod="AltDB" PreviewAttribute="XXXX" />
```

7. From the Management Console, *remove* the Report Database connection of the alternate database labeled "Alternate DB":

   a) Click the **Report Database Management** action group.

   b) Click the **Report Database Connections** action.

   c) Highlight the "Alternate DB" connection.

   d) Click **Remove**.

   e) Exit the Management Console.

8. Access the application and confirm that the preview features have been properly configured.

When a user creates or modifies a report, the following message will appear at the top of the report preview:

> Preview data is a subset of the actual data.

When the report is previewed it should be rendered with data from the alternate database connection.

Here's an example snapshot of a report preview with one of the alternate preview methods configured:

Categories (Preview)	Date: Friday, July 23, 2010 Time: 11:39:16 AM

* Preview data is a subset of the actual data.

Category ID	Category Name	Description
1	altBeverages	Soft drinks, coffees, teas, beers, and ales
2	altCondiments	Sweet and savory sauces, relishes, spreads, and seasonings
3	altConfections	Desserts, candies, and sweet breads
4	altDairy Products	Cheeses
5	altGrains	Breads, crackers, pasta, and cereal
6	altMeat	
7	altProduce	Dried fruit and bean curd
8	altSeafood	Seaweed and fish

When the report is rendered from the list or reports, not as a preview, the report will appear as:

Categories	Date: Wednesday, July 21, 2010 Time: 1:33:12 PM

Category ID	Category Name	Description
1	Beverages	Soft drinks, coffees, teas, beers, and ales
2	Condiments	Sweet and savory sauces, relishes, spreads, and seasonings
3	Confections	Desserts, candies, and sweet breads
4	Dairy Products	Cheeses
5	Grains	Breads, crackers, pasta, and cereal
6	Meat	
7	Produce	Dried fruit and bean curd
8	Seafood	Seaweed and fish
9		

Reverting to the Default Behavior:

1. Open the `_Settings.lgx` file in a text editor.

2. In the **Constants** element, locate the constants attributes for the Report Database connection with customized preview attributes. Modify the *PreviewAttribute* attribute value to *Main* :

```
<DB-21 SchedulingPdfEmail="c:\program files\logixml ad hoc report
builder\ahEmail\Attached.htm" SchedulingArchiveEmail="c:\program
files\logixml ad hoc report builder\ahEmail\Archived.htm" Subject=""
Scheduling="False" Archival="False" ArchiveFormat="HTML"
ArchivePhysicalPath="" ArchiveWebPath="" FromEmailAddress="" CC=""
BCC="" PreviewMethod="LimitRow" PreviewAttribute="Main" />
```

3. Save the file.

4. Access the application and confirm that the preview features have been properly configured.