Logi Ad Hoc Reporting

Management Console Usage Guide

Version 12.1

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Contents

Introduction

The Logi Ad Hoc Management Console (MC) is the primary management tool for the centralized administration of all Ad Hoc Reporting instances. As such, it is version-specific and allows the System Administrator to create, configure, and manage those instances.

This document discusses use of the MC.

Throughout this document notations regarding differences between the Java and .NET versions of the MC and Ad Hoc are displayed in this format:

Java -
Java related content

Target Audience

This guide is intended for the system administrator and/or database administrator. The successful configuration of an Ad Hoc Reporting instance requires knowledge of networking, database technologies, and configuration options intended to simplify the end-user experience.

For additional technical documentation for this or any other Logi Analytics product, please visit our web site at http://www.logianalytics.com/support/.

Related Documentation

In addition to being available online from our DevNet web site, copies of key documents are installed with each instance in its `ahHelp` folder. Shortcuts to them have been added to the Logi Ad Hoc Reporting group in the Start Menu. These documents are:

Document	File
Management Console Installation Guide	Install_Guide.htm
Management Console Overview	Mngt_Console_Overview.htm
System Administration Guide	System_Admin_Guide.htm
Report Design Guide	Report_Design_Guide.htm

System Requirements

Components

The MC requires that the following components be installed on the server:

- 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 on both server and client machines.

The MC also may require the following:

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

Supported Reporting Databases

The MC supports the following databases for reporting and as a report definition repository:

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

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.

Java -
Oracle, MySQL, and PostgreSQL are the supported reporting databases.

Supported Metadata Databases

The MC supports the following metadata databases:

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

Java -
Oracle and MySQL are the supported metadata databases.

Definitions

The following terminology is used with Logi Ad Hoc:

Instance

An Ad Hoc Reporting instance is a web-based application designed to give non-technical users the ability to create robust, full-featured, business intelligence reporting. An instance requires a physical directory, virtual directory, metadata database, and the schema of at least one reporting database.

Metadata Database

"Metadata" is a word that the System Administrator will become intimately familiar with. It's the bridge between the reporting database schema and the Ad Hoc reporting functions, security model, and user interface.

One of the initial decisions for the System Administrator is to identify a DBMS and configure the metadata database. By default, Ad Hoc uses Microsoft SQL Server Compact Edition (CE) to store the metadata. Ad Hoc may also be configured to any of the other databases listed above as the metadata repository.

*If a metadata repository other than MS Sql Server CE is chosen or required, the System Administrator should configure the metadata database **prior** to creating and populating an instance of Ad Hoc. Scripts*

are provided to establish the metadata database for each DBMS provider.

Reporting Database

A Reporting Database is the data repository or the source of the data for the reports. Some portion of the schema of a reporting database must be ported into the Ad Hoc metadata. There is no actual reporting data in the metadata database.

Report Definition Repository

By default, report definitions are stored in text files in a folder under the installation folder of the Ad Hoc instance. For most installations of Ad Hoc this configuration remains the typical configuration.

Ad Hoc also supports the use of a DBMS or an alternative folder to store the report definitions to facilitate clustered/shared environments.

If a DBMS oriented report repository is chosen, the System Administrator must configure the table in the database before it can be used in Ad Hoc. Facilities are provided within the application to port existing reports from the file system to the DBMS report repository.

Note:
The decision regarding whether to use a DBMS, and which DBMS, for a report definition repository is important because there are no facilities to "switch" repository DBMS's or roll back to the file system at a later date. This decision does not have to be made as part of creating the initial instance. Tools are provided to migrate the reports from a folder/file storage system to a database repository later, if desired.

Active Instance

The MC allows the System Administrator to manage multiple instances of Ad Hoc from a central application; however, only one instance can be managed at a time. The instance that is being managed is the "active instance". All MC functions are directed at the active instance.

Active Connection

Each Ad Hoc instance may be connected to multiple reporting databases. All of the reporting database functions are directed toward one of those reporting databases. Within the MC, the current reporting database being managed is called the "active connection".

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 platforms.

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 or upgrade an instance of Ad Hoc, that instance will be created as or 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. Creation and upgrade of instances are ONLY possible on the same server, but other management functions can be performed on instances residing on other servers.

Generally the first step in managing an Ad Hoc instance via the MC is to identify the Ad Hoc instance. If the MC has been used before, it will retain the association to the instance identified in a prior session where possible. If no "current" instance of Ad Hoc is associated with the MC, the Welcome screen will be displayed and an instance can be selected or created.

Typically, customers create a single instance of Ad Hoc (two, if a production and a development environment is required). They also tend to use the default settings provided by the installation. Those settings include:

- Installation on a single web server.
- Using MS SQL Server CE for the metadata.
- Connecting to a single source database.
- Using the file system for storing report definitions.
- Using the standard Ad Hoc user authentication method.
- Using the Themes and style sheets provided with Ad Hoc.
- Using the default Permission packages as delivered.
- No event logging.
- No scheduling reports.
- No archiving of reports.

For these customers, the MC usage is extremely simple. To establish an Ad Hoc instance they must perform the following steps:

1) Create an instance of Ad Hoc.
2) Create a connection to a source database.
3) Port the source database schema into the Ad Hoc metadata database.

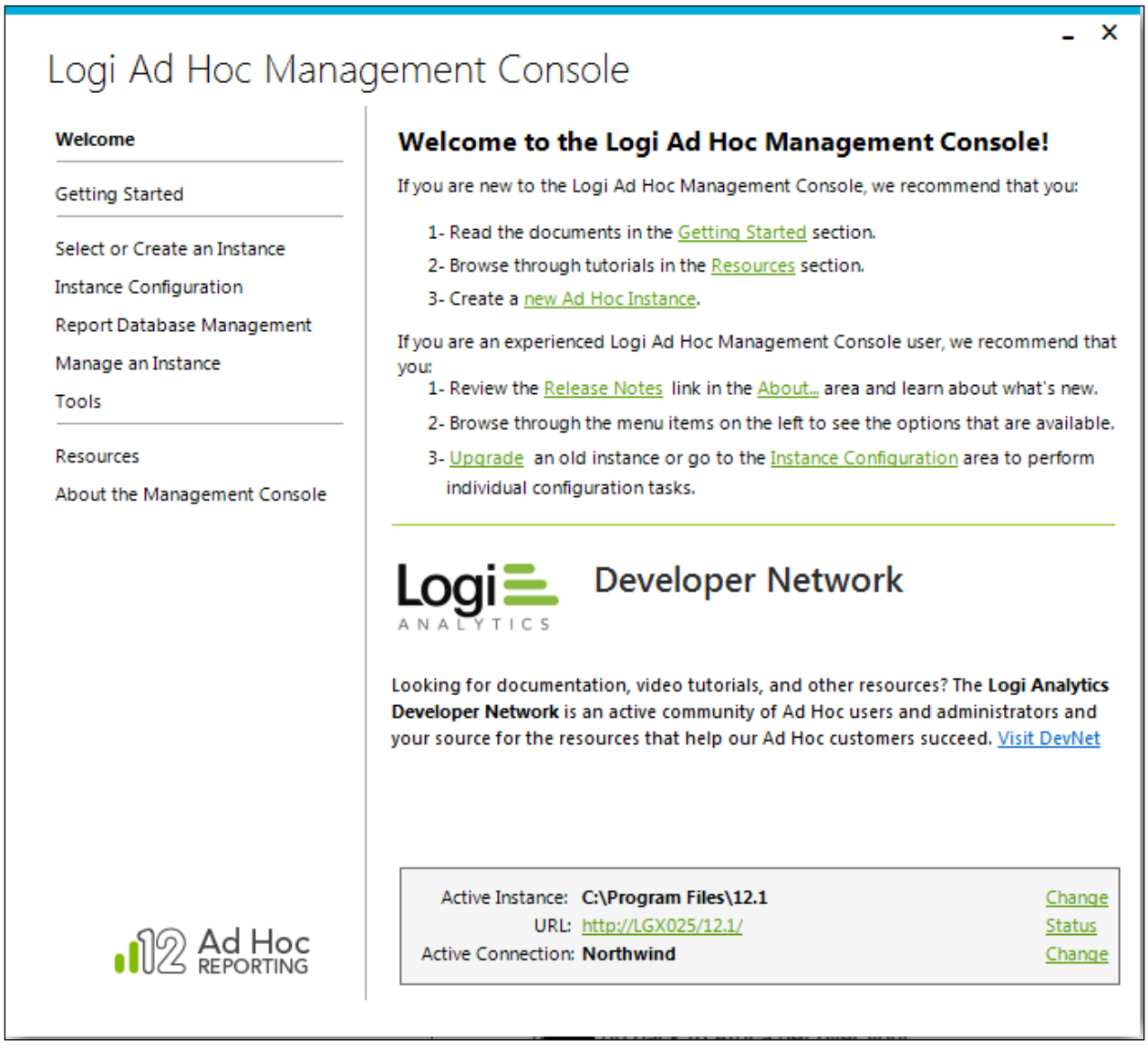
Of course, there are additional steps to completely configure the Ad Hoc instance, such as specifying users/roles and tailoring the reporting schema for their user-base but, at this point, a working instance of Ad Hoc will have been established.

Java -
Java configurations must establish the metadata database manually. Scripts are provided to assist in the creation of the Oracle and MySQL metadata databases.

Management Console Interface

The MC interface is divided into three main panels:

On the left is the Action Group panel. At the top right is the specific Actions panel. At the bottom right is the Target 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 – This action group orients new users and guides them through their first experience with the MC. It also lets experienced users know what is new in this version of the MC.

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

Select or Create and Instance – This action group provides tools to locate an existing Ad Hoc instance or to create a new one.

Instance Configuration – This action group provides tools to configure Ad Hoc instance features. The Configuration Wizard combines 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 or remove an existing Ad Hoc instance

Tools – This action group provides tools to share reports with other Logi products. “Publishing” is the technique that provides access to those reports. “Synchronization” is the technique that makes reports from an Ad Hoc instance available. In addition, 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's 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 initially visible after a new install of the Management Console since there are no active instances at that point.

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.

Java -
The URL is not displayed in the target panel.

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 displayed in the Actions panel.

Welcome Screen

When the MC is launched for the first time, there are no instances associated with it and the Target panel isn't shown. The Actions panel shows the Welcome options.

The intent of the Welcome screen is to assist users new to the MC, as well as guide experienced System Administrators, to helpful resources related to the new version of the MC.

Links to documentation and the most common options for a new version of the MC are provided.

Getting Started Screen

The Getting Started screen is intended to guide a new user through the process of creating an instance of Ad Hoc. In addition to links to helpful documentation, the Configuration Wizard may be launched

from here. For the first-time user, we highly recommended that the Configuration Wizard be used to create an instance. The wizard is designed to present all of the necessary steps to establish a new instance of Ad Hoc.

Most of the configuration functions available in the MC are also available through the Configuration Wizard. As a user becomes more experienced with the MC, individual configuration options may be used directly through the MC interface.

Management of Ad Hoc Reporting Instances

Creating an Ad Hoc Instance

Creating an Ad Hoc instance consists of establishing the physical folder structure, populating it with application files, creating a virtual directory, and defining a shortcut to the instance.

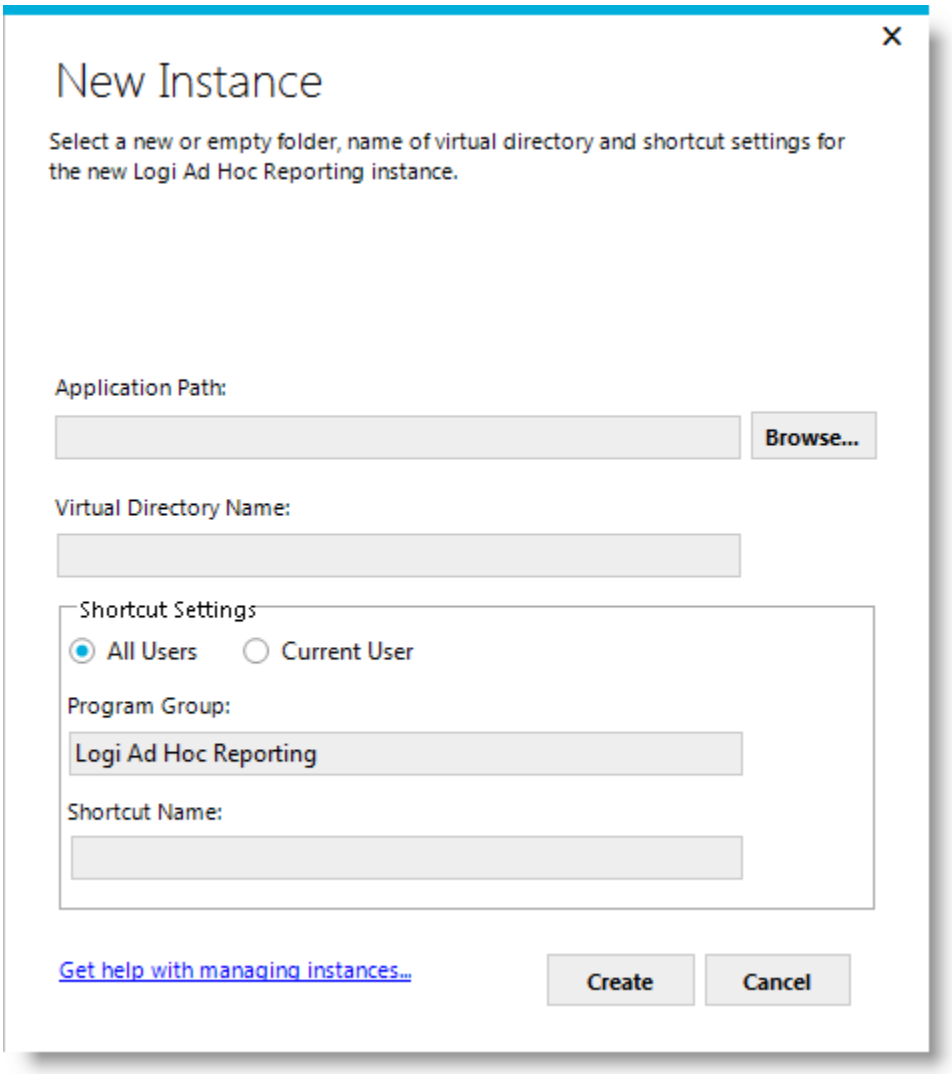
The MC provides two techniques for doing this:

First, the System Administrator can use the Configuration Wizard to create an instance. As part of creating that instance, the Configuration Wizard will also present the remaining required configuration steps to make the instance usable. This technique is covered fully elsewhere in this document.

The second technique, covered here, begins by clicking **Select or Create an Instance** and then on **Create a New Instance**.

Note:
New instances can only be created on the same server as the Management Console.

The **New Instance** dialog box will be displayed and all of the information is required:



Application Path – The physical location of the instance folders and files.

Use **Browse** to launch the **Browse for Folder** dialog box. Then navigate to the folder into which the instance root folder will be created and click **Make New Folder**. Enter the folder name and click **OK**. The full path of the target folder for the instance will be displayed in the *Application Path*.

Virtual Directory Name – The name of the site managed by the web server.

All/Current User – Determines the visibility scope of the shortcut.

Program Group – The name of the parent shortcut group. The default is “Logi Ad Hoc Reporting”.

Shortcut Name – The name of the link to the instance.

Java -
Only the Application Path is displayed in the dialog box.

Click **Create.** The physical folder structure will be created, permissions on the folders will be set, and the folder will be populated with files. An empty metadata database will be established, and _Settings.lgx file will be created. The virtual directory will be created with the default properties and the shortcuts established.

Note:
If the default Sql Server CE metadata database is not going to be used, an alternate metadata database must be created and connected to the instance. Scripts have been provided to accomplish this task. See the section on “Metadata Connection” for a full explanation of creating and connecting an alternate metadata database to the instance.

After a new instance of Ad Hoc is created, only the requisite application files, shortcuts and virtual directory will have been created. The System Administrator must connect and configure at least one reporting database to the instance before the instance can be used for reporting. The Configuration Wizard, by default, will execute the required processes to complete the basic instance configuration.

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 is “Admin” and its password is “password”.

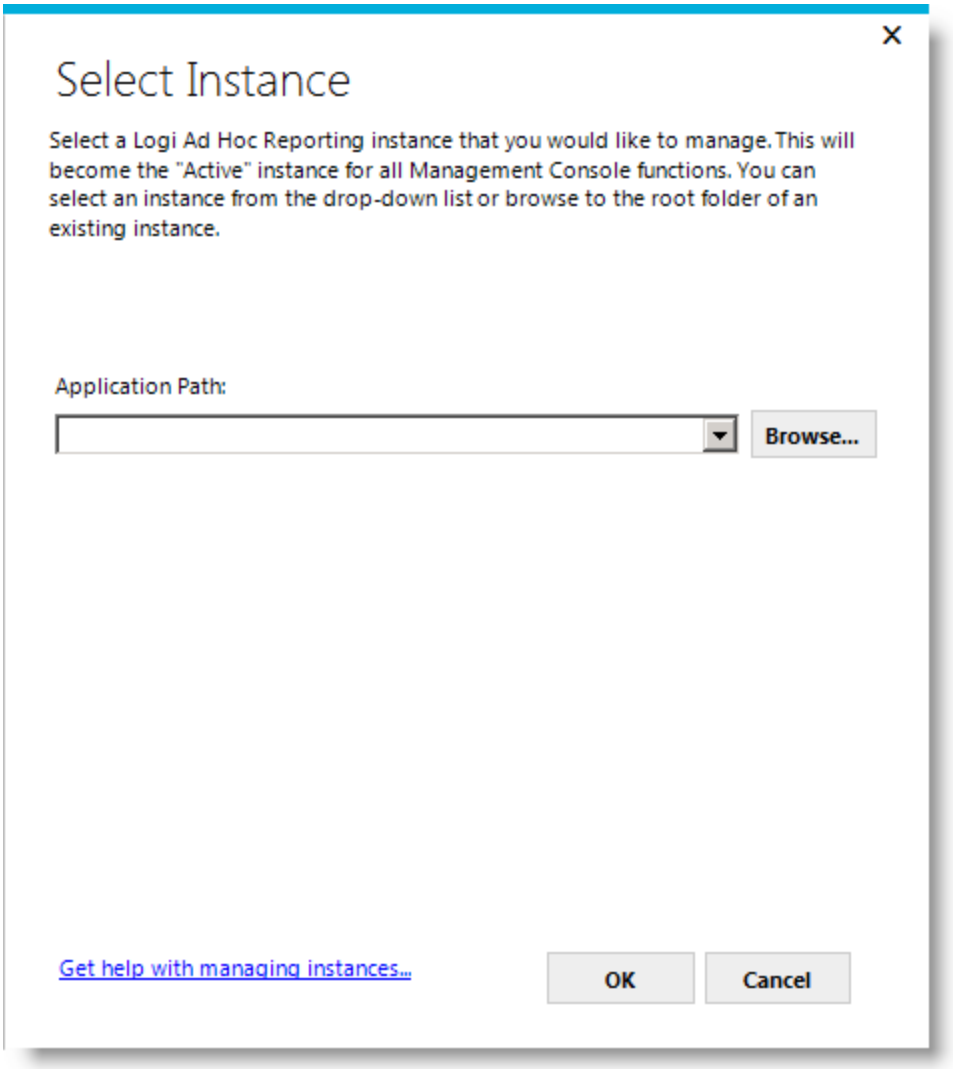
We *highly recommended that the administrator change the password after the initial login.*

Selecting an Instance

Although the MC allows the System Administrator to manage multiple instances of Ad Hoc from a central application, only one instance is "active" for management at a time. When the MC is launched, it will be directed toward the last active instance. The Target Panel identifies the active instance.

To redirect the MC functions to a different instance, click **Select or Create an Instance** and then click **Select an Existing Instance**. Alternatively, you could also click the **Change** link associated with the Active Instance in the target panel.

The **Select Instance** dialog box will be displayed:



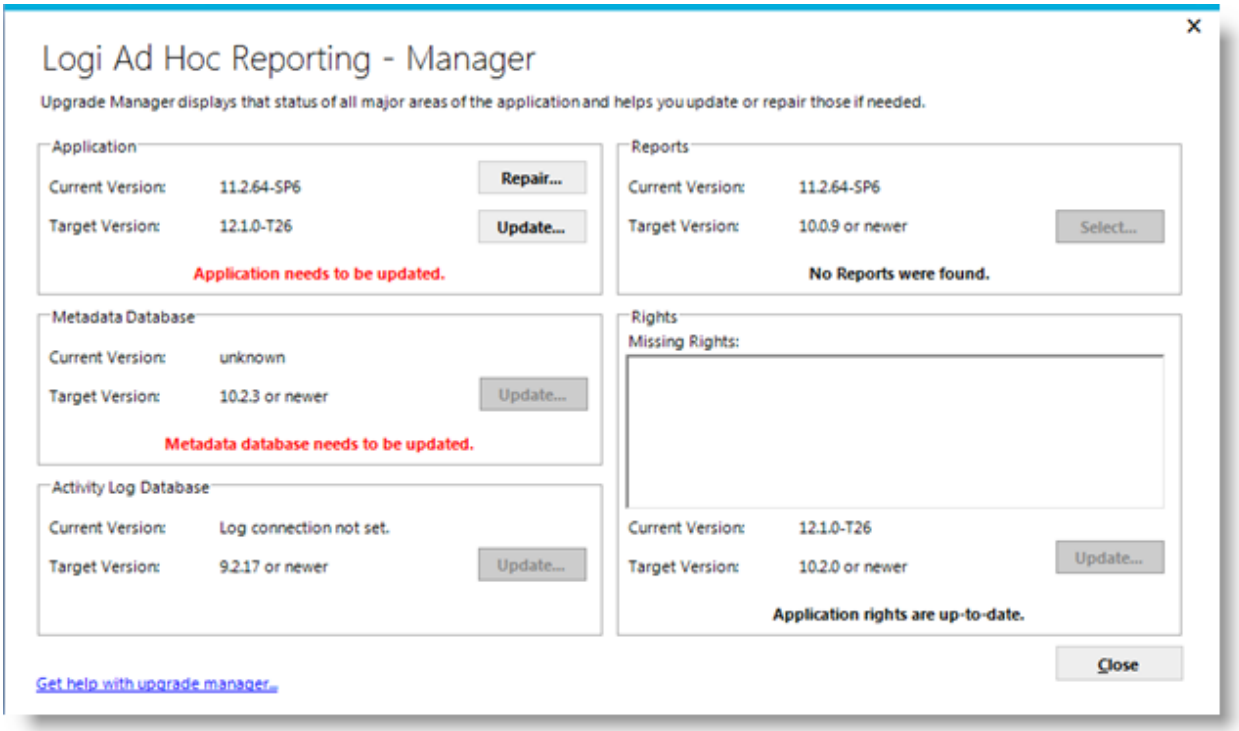
The drop down list of *Application Paths* contains the list of instance folders previously accessed by the MC. Either select an instance from the list or browse to the root folder of an instance with the **Browse** button.

Click **OK** to change the active instance in the MC.

Upgrading an Instance

Whenever an instance is selected in the MC, the version of the instance is compared to the version of the MC. If the Active Instance is older than the MC, the *Active Instance* path in the target panel will turn red indicating that the instance is a candidate for upgrading to the version of the MC.

To upgrade an instance of Ad Hoc, click **Manage an Instance** and then click **Upgrade Instance** and the **Upgrade Manager** dialog box will be displayed:



There are five aspects of the instance that may require attention; *Application, Metadata Database, Activity Log Database, Report,* and *Rights*. A red message indicates that an aspect may need attention.

The *Application* area addresses the folders and files of the instance. Click **Update** to copy the necessary folders and files from the MC to the active instance folder. The Application must be upgraded before other aspects of the instance can be upgraded. You'll be prompted to determine if a backup should be made of the instance.

The *Metadata Database* area addresses the schema and data of the metadata database connected to the active instance. Click **Update** if it is enabled.

The *Activity Log Database* area addresses the schema of the logging table. Click **Update** if it is enabled.

The *Reports* area addresses internal constructs of the report definitions. We recommend that the reports be fixed by clicking **Update**, however, it isn't required. Users will still be able to create and run new reports.

The *Rights* area addresses any new rights that have been incorporated into Ad Hoc. Click **Update** if it is enabled. All new rights are added to the System Administration permission package.

Notes:
Whenever a metadata database is connected to an instance, it's good practice to run the Upgrade Manager. This is especially true when the metadata database has recently been created and connected to the instance.

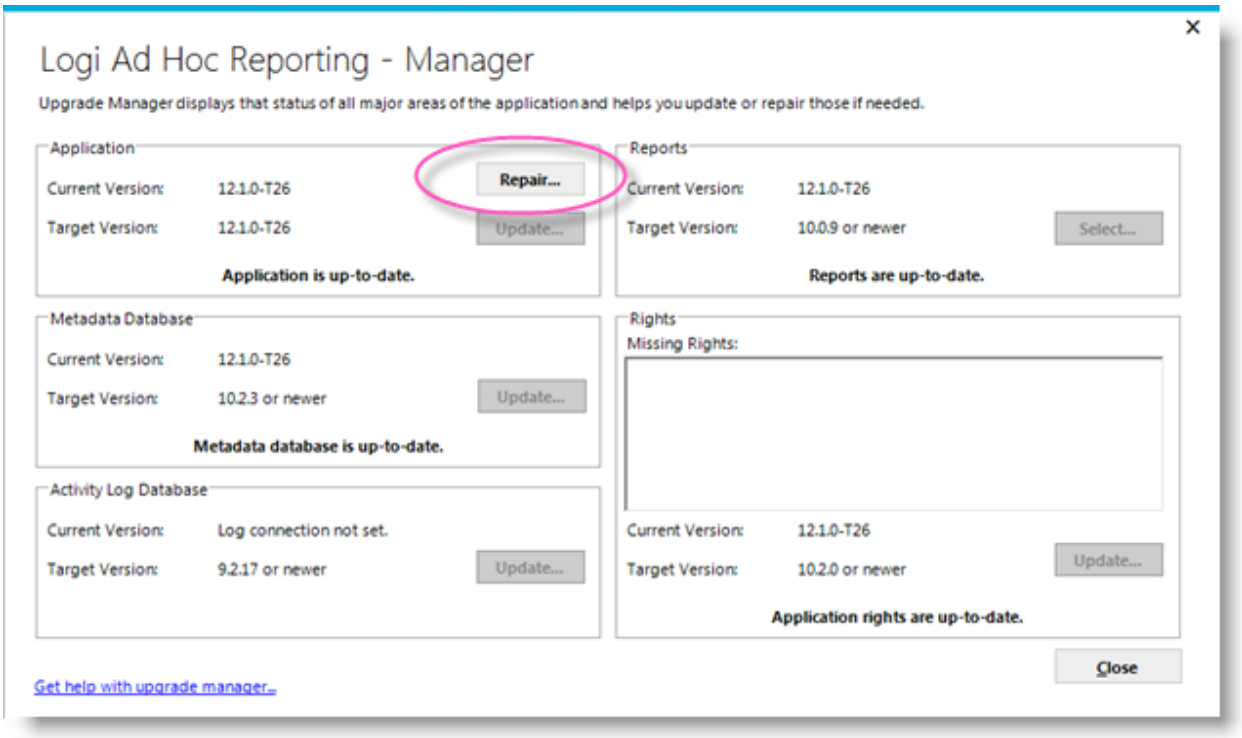
Customizations are always an issue with any upgrade. We strongly suggest that the Diagnostic Tool for the version of Ad Hoc being updated be run on the instance *before* the upgrade, if the Diagnostic Tool is available. The results will identify which files in the existing version have been customized and are different from the standard installation. Once the automated portion of the upgrade has finished, similar customizations are usually necessary to complete the upgrade process.

The core process of an upgrade is the copying of all of the files for the version into the folder of the target Ad Hoc instance. The copy process is a **full overwrite of the corresponding files.** The notable exceptions are the `_Definitions/_Settings.lgx` and the `Database/ahData.sdf` files and files in the `ahCustom` directory. Consequently, it's critical that the System Administrator know the extent and content of the customizations that have been made and be prepared to re-apply the customizations as necessary.

The virtual directory and shortcuts related to an updated Ad Hoc instance will remain unchanged. Of course, if there are version references in the naming conventions for these entities or if they need reorganization, the System Administrator can manually make the necessary adjustments.

Repairing an Instance

If you think that an instance has been corrupted, the folders and files can be repaired by using the Upgrade Manager. After selecting the instance, click **Manage an Instance** and then click **Upgrade Instance** and the **Upgrade Manager** dialog box will be displayed:



To repair the active instance, click **Repair** in the *Application* area. You'll be prompted to determine if a backup should be taken of the instance.

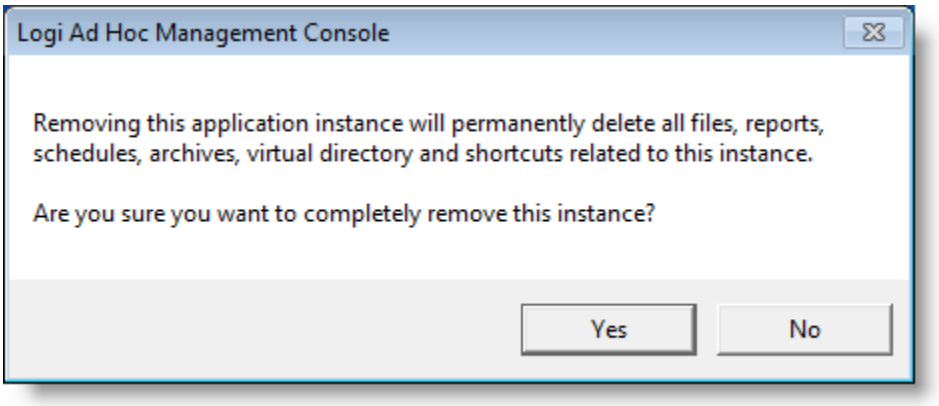
The Upgrade Manager will then copy the application folders and files from the MC to the active instance.

As noted in the previous "Upgrading an Instance" section, the System Administrator should be aware of any customizations to the Ad Hoc instance. The repair process will present a list of "non-standard" files that are about to be overwritten.

Removing an Instance

To remove the active instance, click **Manage an Instance** and then click **Remove Instance**.

The following confirmation message will be displayed:



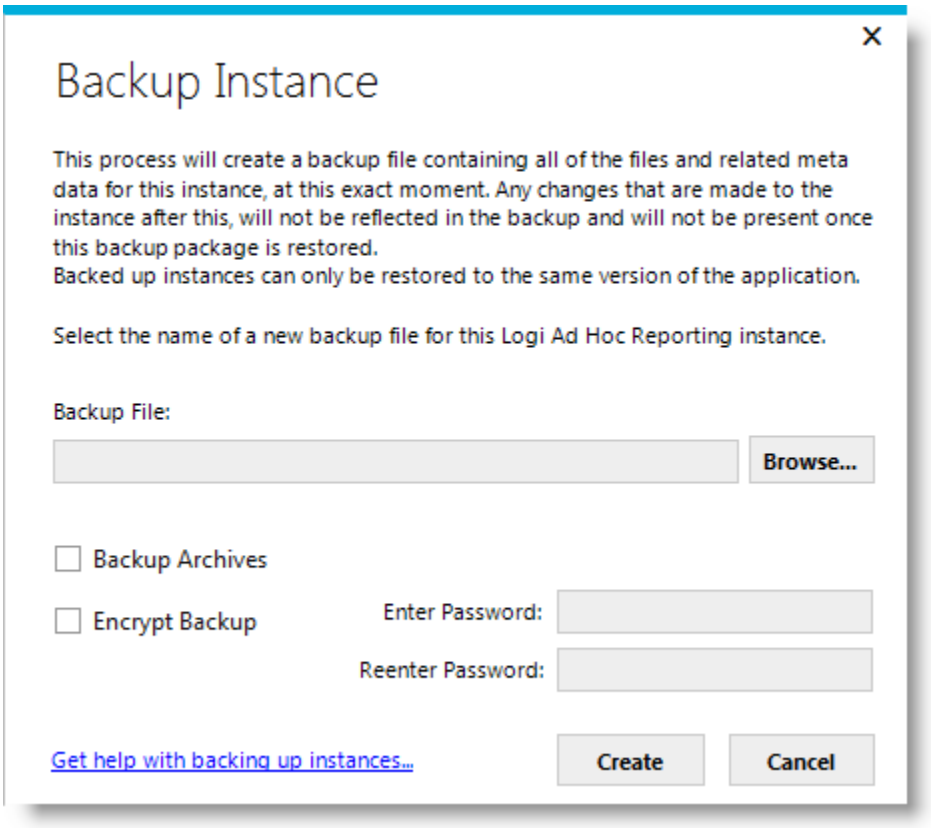
Click **Yes** to confirm removal of the active instance. Since there will be no active instance immediately after removal of the instance, the target panel will not be shown in the MC interface.

Note:
This removes *only* the active instance. This does not remove the MC. For instructions regarding removal of the MC, refer to the Manage the Management Console / Remove section of this document.

Backing Up an Instance

The Backup utility creates a compressed file, in .zip format, that contains all of the physical files and metadata associated with an instance. It provides options to include archived reports, to encrypt the backup file, and to provide password protection for it.

To create a backup of the active instance, click **Manage an Instance** and then **Backup Instance**. The following dialog box will be displayed:



Either enter a fully-qualified path and filename for the backup file or click **Browse** to navigate to and select the location.

To include the report archives for the instance in the backup file, check **Backup Archives**.

To encrypt the resulting backup file, check **Encrypt Backup**.

To password protect the resulting backup file, check **Encrypt Backup** and enter the same password in the **Enter Password** and **Reenter Password** text boxes.

Notes:
Backup files should be managed by the System Administrator. We suggest that regular backups be made and the files placed in folders outside of the instance folder. The backup file contains all of the information to completely replicate an instance as a snapshot in time.

The restore process will NOT overwrite an existing instance or virtual directory. The restore process will create an entirely new instance to the extent possible.

We recommend that user activity be suspended for the duration of the backup process.

Restoring an Instance

The Restore utility will use a previously-created backup file to replicate an instance in a new location. However, re-creating an instance is not as simple as just restoring its files to a new location. The process must:

- Replicate the instance folder contents in a new location.
- Create a new virtual directory or site.
- Adjust the _Settings.lgx file to account for the new location and other revised configuration options.
- Create new shortcuts to the new instance.
- If the metadata database in the source instance is SQL Server, Oracle, or MySQL, it must be either be replicated in a new structure or converted to SQL CE.
- If the reports in the source instance are not in the standard location, new repositories must be created.
- Allow the configuration of event logging, scheduling, email and archives.

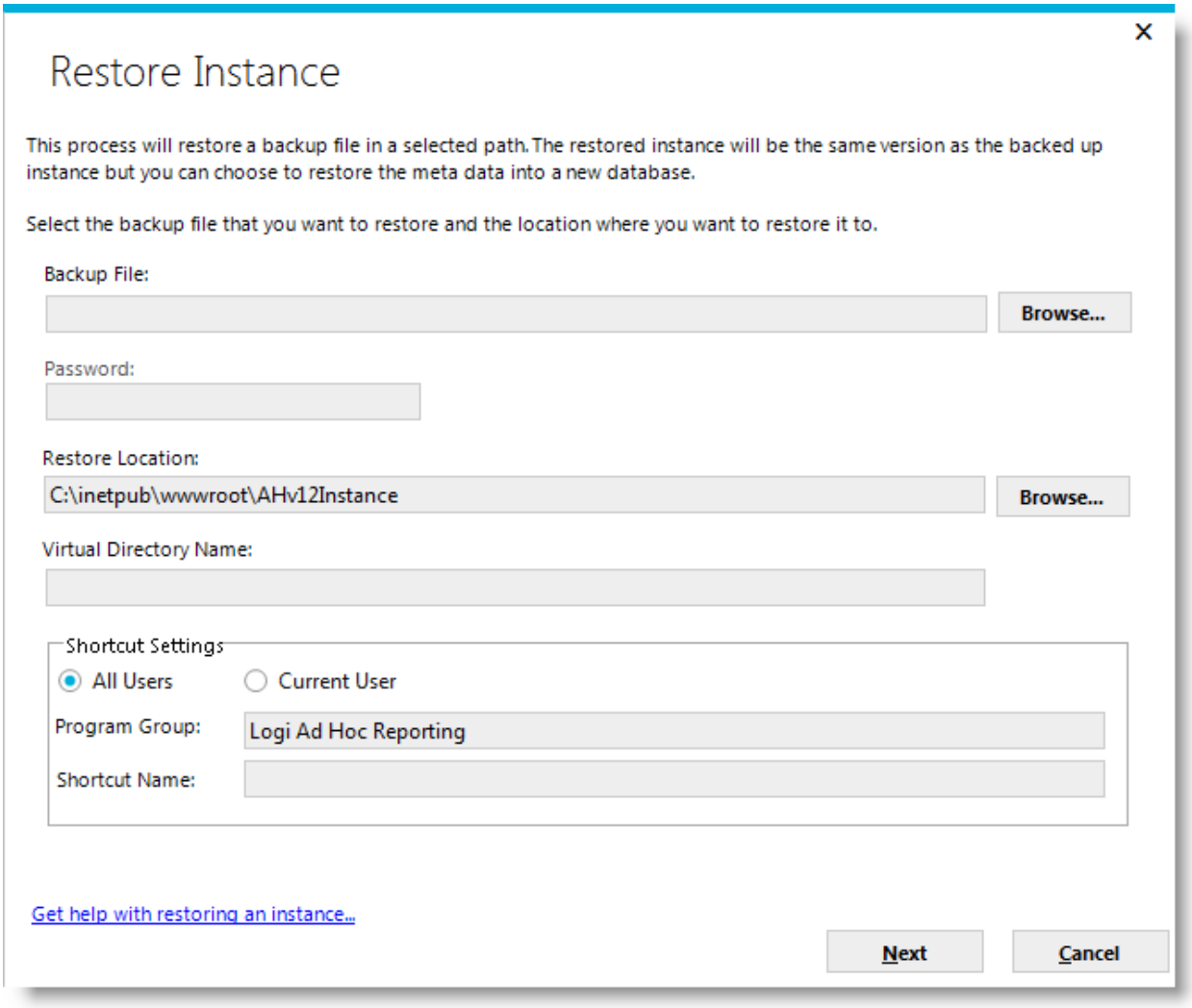
Essentially, the restore process uses the core information from one instance to create an entirely new instance. Experienced System Administrators will recognize the purpose and content of the various dialog boxes that may be displayed during the restore process. Not all of the dialog boxes shown below are displayed during a restore, and those shown are typical for the configuration of the source Ad Hoc instance.

Notes:
The Restore utility cannot be used to overwrite an existing instance. If the result of the restoration is to *replace* an existing instance, all related parts of the existing instance must be removed or renamed prior to the restoration process.

We highly recommend that the System Administrator configure the restored instance as a wholly separate instance. This will prevent maintenance on other instances from impacting the newly-restored instance.

The Restore utility will verify the product version. Only backup files from the same version as the Management Console will be permitted to be restored.

Click **Manage an Instance** and **Restore Instance** to initiate the restore process. The following **Restore Instance** dialog box will be displayed:



Identify the **Backup File** that is to be used as the source of information for the restoration process by either entering a fully-qualified path and file name or clicking the adjacent **Browse** button and navigating to it.

If the backup file was created with password protection, enter the password in the **Password** textbox.

Set the target location of the restored instance by either entering a fully-qualified path to a folder in the **Restore Location** textbox or clicking the adjacent **Browse** button and creating a new folder at the desired location.

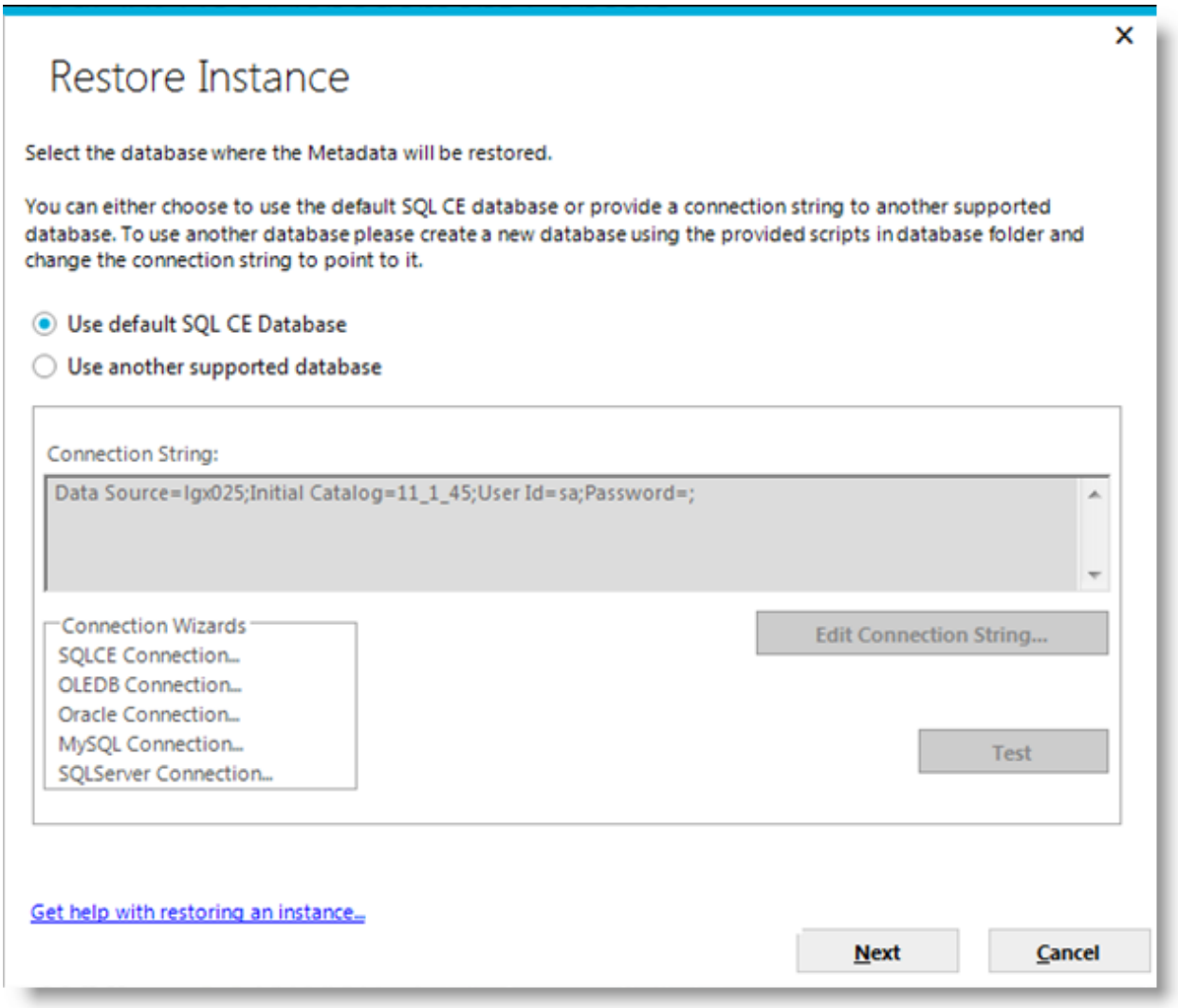
Set target virtual directory name for the restored instance in the **Virtual Directory Name** textbox.

Identify the shortcut properties for the restored instance by entering the **Program Group** and **Shortcut Name** and determine the scope of the shortcut.

Note:
The Restore Location folder must be empty, and the Virtual Directory and Shortcut Name must be unique.

Click **Next** to continue the Restore Instance process.

If the metadata database in the source instance was SQL Server, Oracle, or MySQL, the restore utility will present a **Metadata Database Connection** dialog box to allow you to specify the target location for the metadata for the new instance.



Select the **Use default SQL CE database** option if that's appropriate for the newly restored instance.

Most System Administrators will opt to keep the metadata in a DBMS similar to the source instance. If that's the case, the System Administrator must create the metadata schema in the same manner they had to for the source instance. If the source instance metadata was in SQL Server, Oracle, or MySQL the System Administrator must create a repository for the metadata in the new instance.

Note:
To establish a new repository for the metadata, use one of the scripts provided in the Database folder of the source instance. They are DBMS specific and are named ahMetadata_CreateUpdate_SQLServer, ahMetadata_CreateUpdate_Oracle, and ahMetadata_CreateUpdate_MySQL.

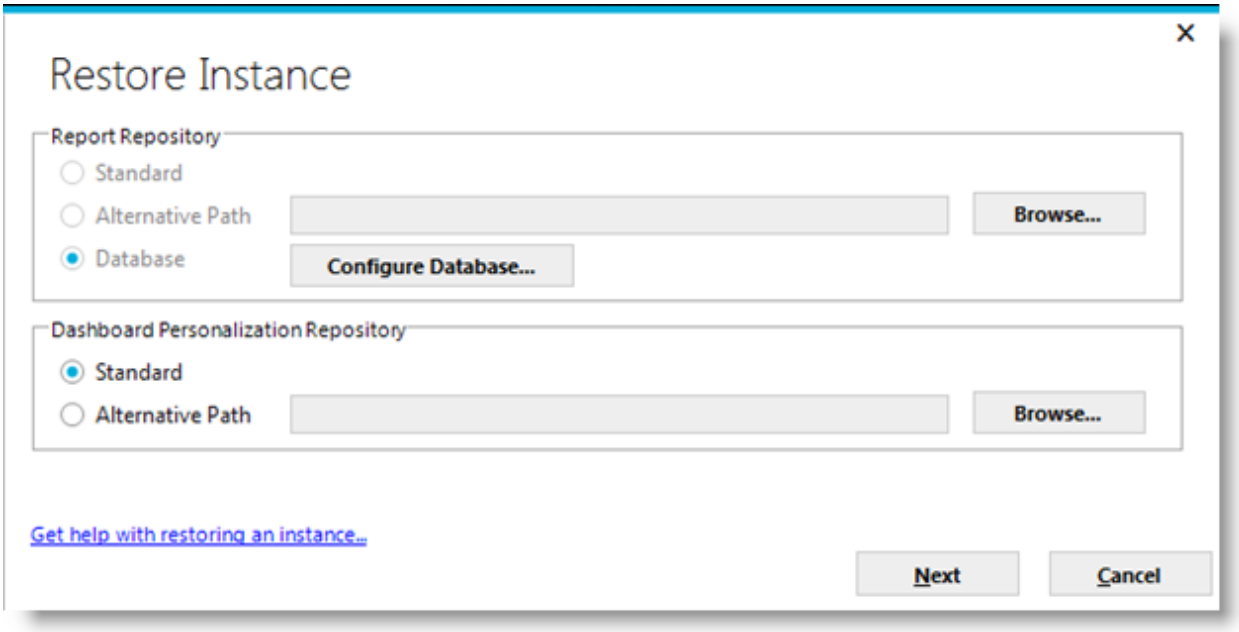
Select the **Use another supported database** option to direct the restore utility to save the metadata information in the new location. Either enter the connection string for the metadata database by clicking **Edit Connection String…** or run one of the Connection Wizards links.

Verify the new connection string by clicking **Test**.

Click **Next** to continue the Restore Instance process.

If the report definitions were stored in a non-standard repository in the source instance, the restore process will allow the System Administrator to configure the repositories in the new instance.

The **Report Repository** dialog box will be displayed:



The initial options displayed in this dialog box mirror the configuration of the source instance. For example, if the repositories were “standard” in the source instance, the **Standard** option will be selected.

Select one of the available options for the report repository.

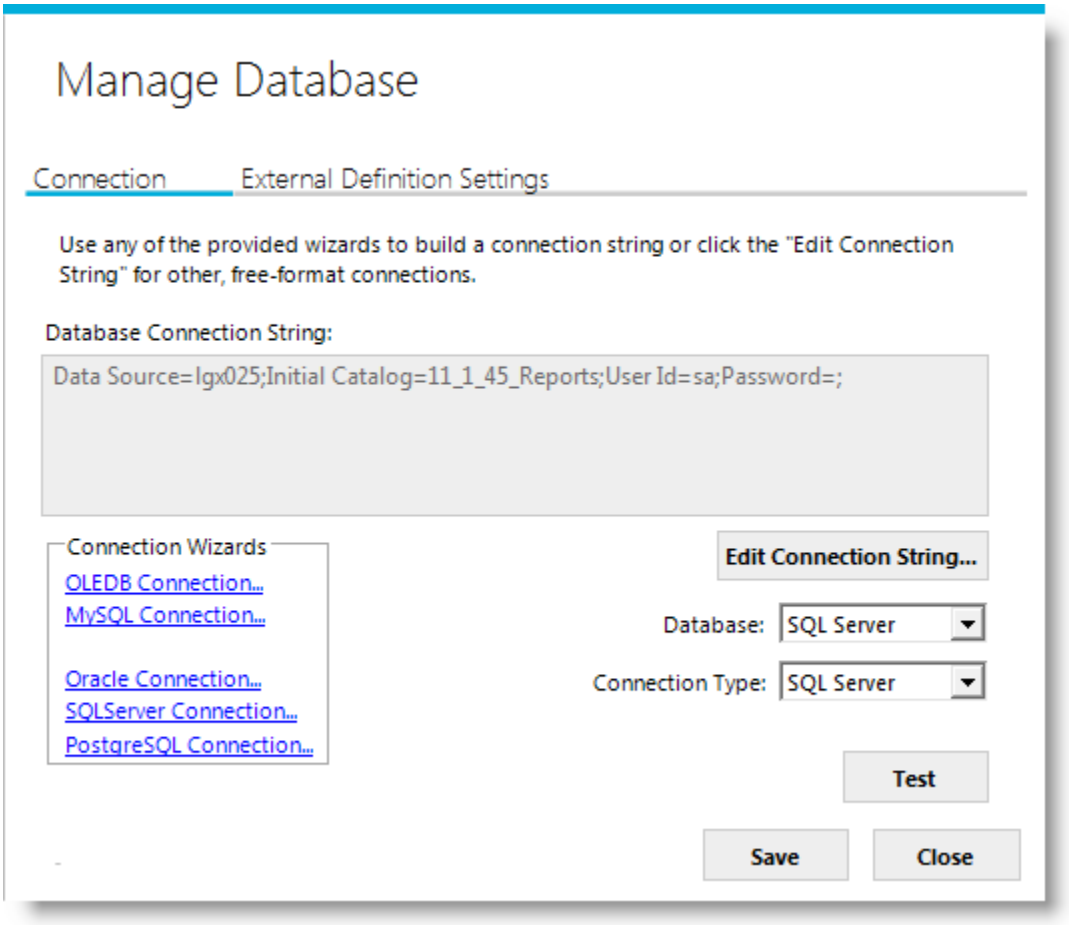
To specify an **Alternative Path**, either enter a fully-qualified folder path or click the adjacent **Browse** button to establish a new folder for the report files.

Click **Configure Database…** to identify the database used for the report definitions and to define the SQL commands used to manage the report table.

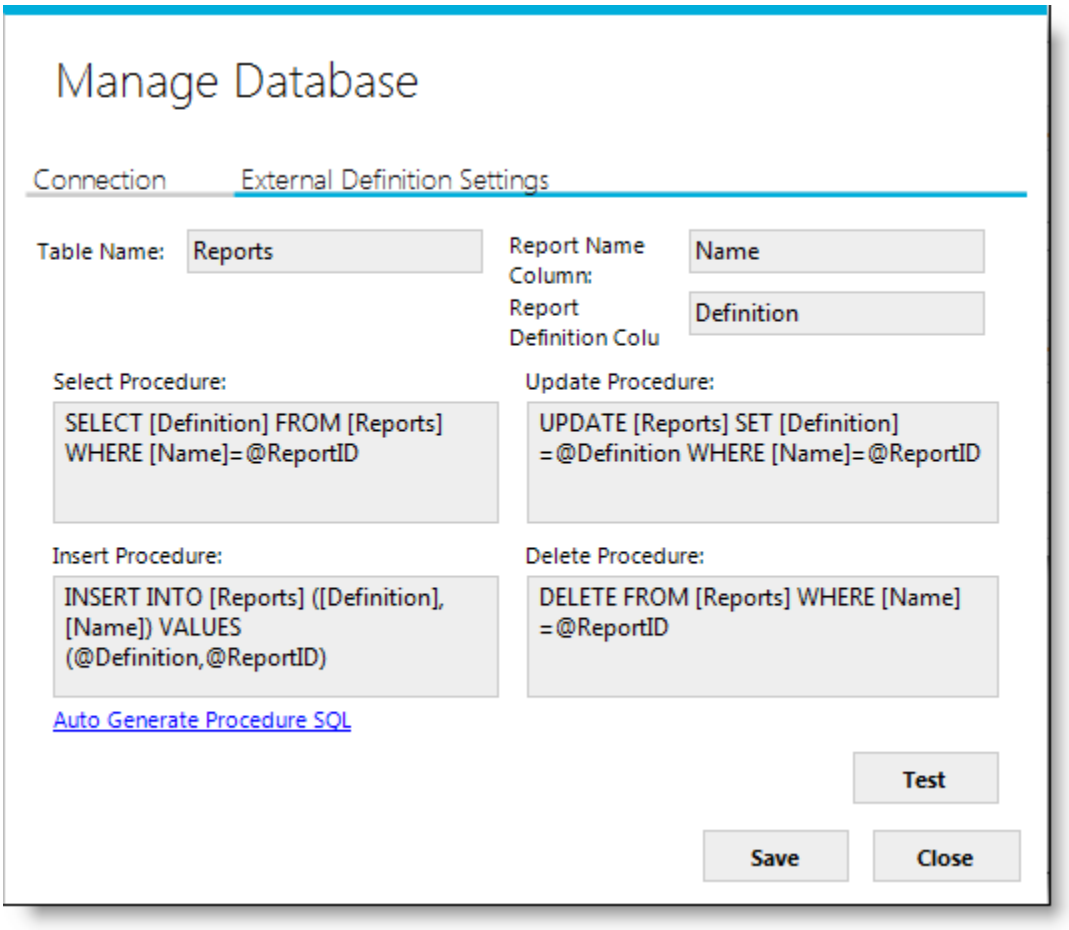
Click **Next** to display the next dialog box in the Restore Instance process.

In the previous example, the report definitions in the source instance were stored in a database. When the information is restored, the expectation is that the target instance will *also* store the report definitions in a database.

The following dialog box with the appropriate tabs will be displayed when **Configure Database…** is clicked:



The **Connection** tab allows the System Administrator to set the connection string to the table in a database that acts as a report repository.



The External Definition Settings tab identifies the table, columns, and SQL statements that are used to manage the report definitions.

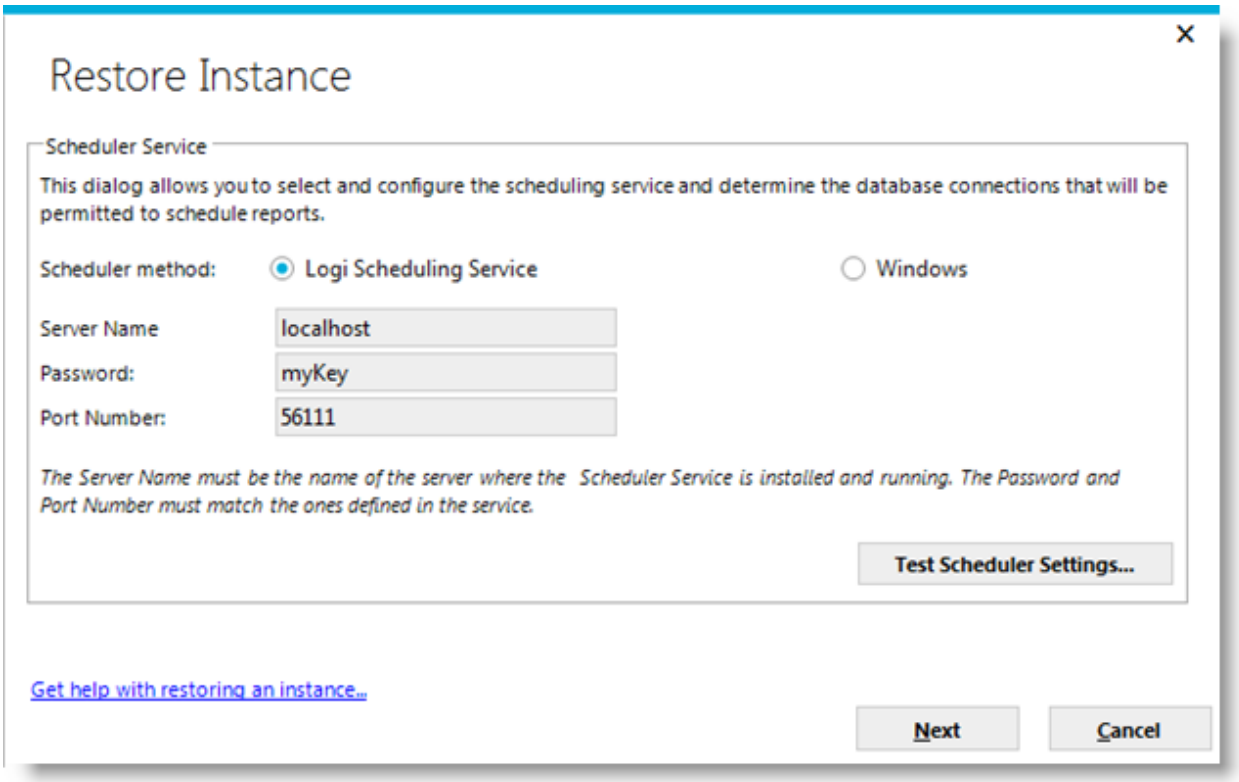
Configuration of a database report repository is covered in more depth in the **Application Settings** section of this document.

Note:
In order to establish a connection to a new database report repository, the System Administrator must have previously created the table/columns in the database to store the report definitions. There are no scripts provided but here's the required structure:

- The Report Name column - should be the equivalent of varchar(255).
- The Report Definition column should be the equivalent of varchar(max).

The credentials used in the connection string must grant the privileges necessary to maintain the data.

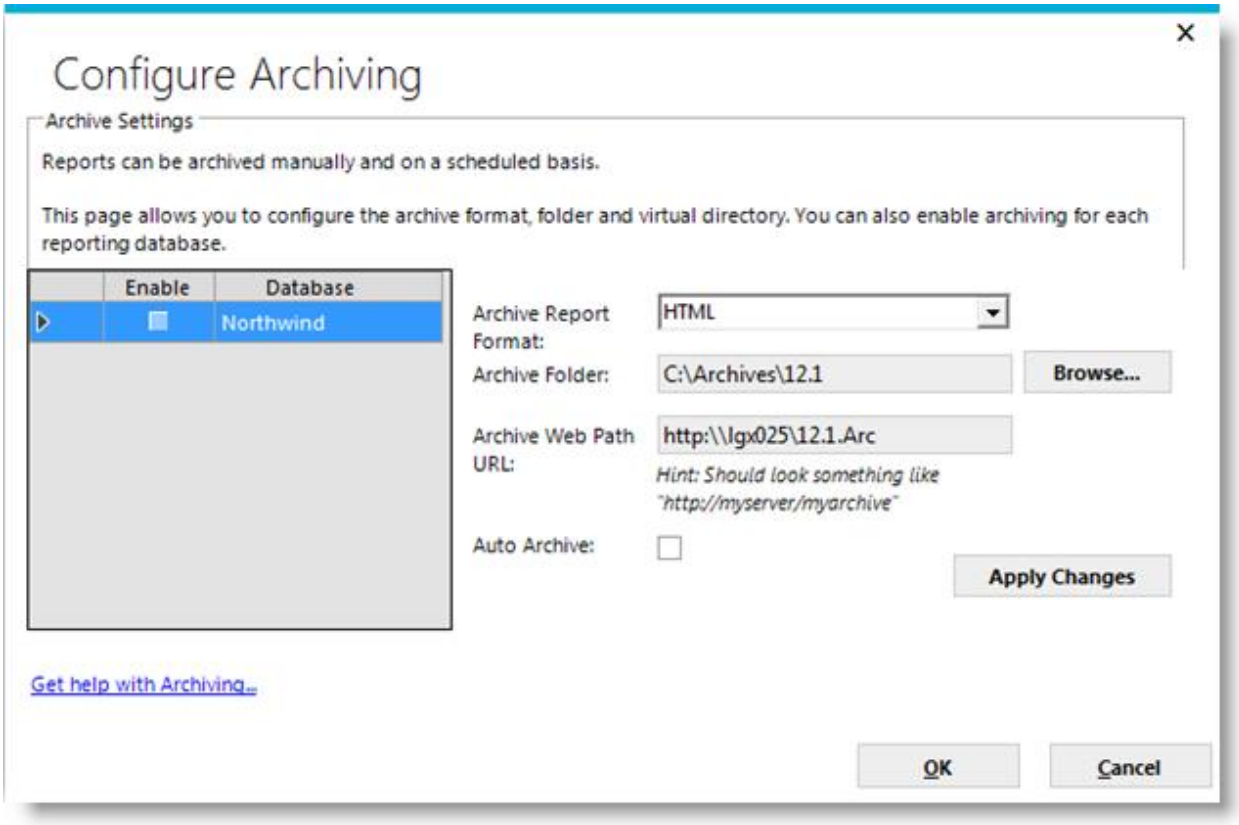
If the source instance had report scheduling enabled, the Restore Instance process will display the **Configure Scheduling** dialog box so the System Administrator can identify the scheduler service and credentials:



Select the **Scheduler Method** and provide credentials to allow schedules to be stored. Click **Test Scheduler Settings…** to verify that the credentials allow new schedules to be created.

Note:
The Restore Instance process will create all new schedules for the backed up, scheduled reports. The new schedules will be created using the specified scheduler service.

If the source instance was configured with an associated archive structure, the Restore Instance process will display the **Configure Archiving** dialog box:



This allows the System Administrator to identify the reporting database, physical archive folder, and the associated virtual directory, and to select the archive format and enable archiving for the reporting database.

Archiving is configured and enabled at the database level and on the left is the list of report databases connected to the instance. To select a database, click a row in list. To select all report databases, click the upper-left corner of the list.

To enable/disable archiving for all reporting databases, click the *Enable* header.

The *Archive Report Format* drop-down list will display the five available archive formats: HTML, PDF, EXCEL, WORD, and CSV.

The *Archive Folder* attribute identifies the full path of the archive physical folder. Click **Browse** to either navigate to and select an existing folder or to create a new folder.

The *Archive Web Path URL* attribute identifies the web server and virtual directory for the archive.

The *Auto Archive* checkbox determines whether all scheduled reports will be automatically archived for the reporting database. If the *Auto Archive* checkbox is checked here, then the scheduling interface within Ad Hoc will have its Archive and Format controls pre-set and read-only.

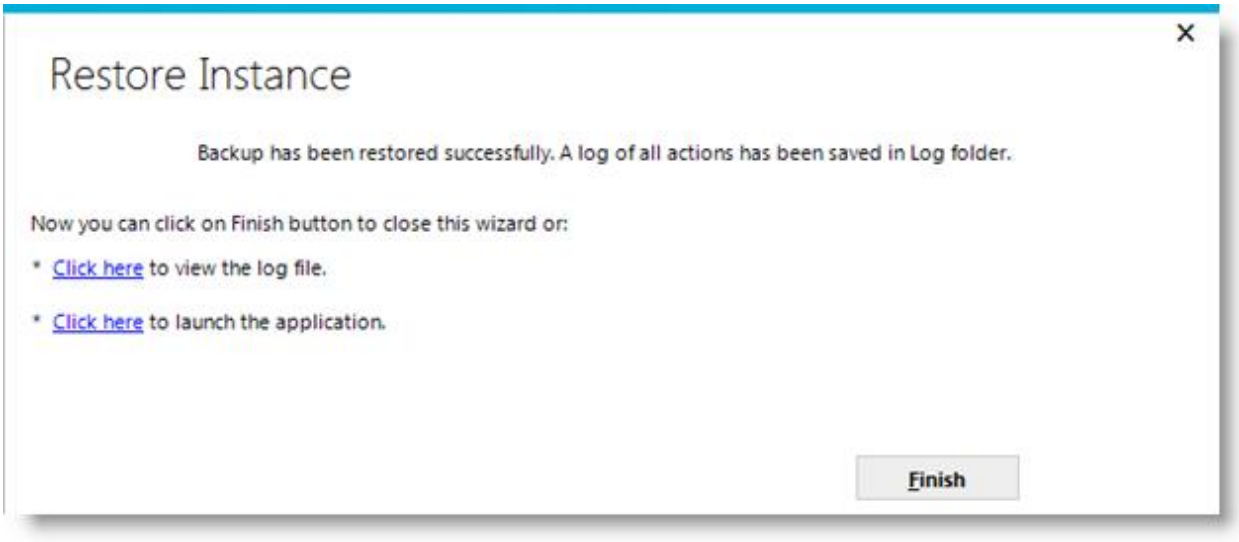
The **Apply Changes** button will become enabled when the information in the three attributes changes. Click it to record the changes to the archive information for the selected databases.

Click **OK** to confirm any unsaved changes and close the dialog box.

Once the archiving parameters have been set, in the instance the "**Add to Archive**" option on the Schedule Definition page will be enabled and a **Show Archive** action will be displayed for each report in the report lists for which an archived report exists.

Note:
Each reporting database may have a unique archive physical and virtual folder and store the reports in a different format. They may also share the archive configuration.

Once all of the required Restore Instance process steps have been addressed, this final dialog box is displayed:



A link in this dialog box allow the System Administrator to review the log file that was created during the restoration process. An excerpt from a log file is shown below.

Restore started at: 6/24/2016 9:42 AM

Restore Location: C:\Program Files\12.1SS_Restore
Backup File: C:\Prgoram Files\12.1SS\Backup_06242016.lgxbak
Virtual Directory: 12.1.SS.Restore
All Users: True
Program Group: Logi Ad Hoc Reporting
Shortcut Name: 12.1 SS Restore

Restoring Instance Files
File: About.aspx
File: AdHocHelp.css
File: AdHocMobile.css
File: ApplicationError.aspx
File: Backup_06242016.lgxbak
File: ChangePassword.aspx
File: Default.aspx
File: gacutil.exe

The log file is created in the Log folder of the restored instance. The generic log file name is `RestoreLog_*.html`.

Another link in the dialog box allows the System Administrator to launch the newly created application.

Click **Finish** to end the Restore Instance process.

Configuration of an Ad Hoc Reporting Instance

Configuration Wizard

The Configuration Wizard leads the System Administrator through a series of steps to configure the active instance. Which dialog boxes are displayed may be determined automatically by the MC or may be set by the System Administrator manually.

The Configuration Wizard is aware of the status of an instance and will automatically guide the System Administrator through the basic steps necessary to configure a working instance of Ad Hoc Reporting. The required steps are:

- Create the physical folders for the application.
- Populate the folders with application files.
- Create and configure the virtual directory.
- Create the shortcuts to the application.
- Establish a connection to a reporting database.
- Import the schema of the reporting database.
- Provide user-friendly names for the objects and columns.
- Categorize the objects.

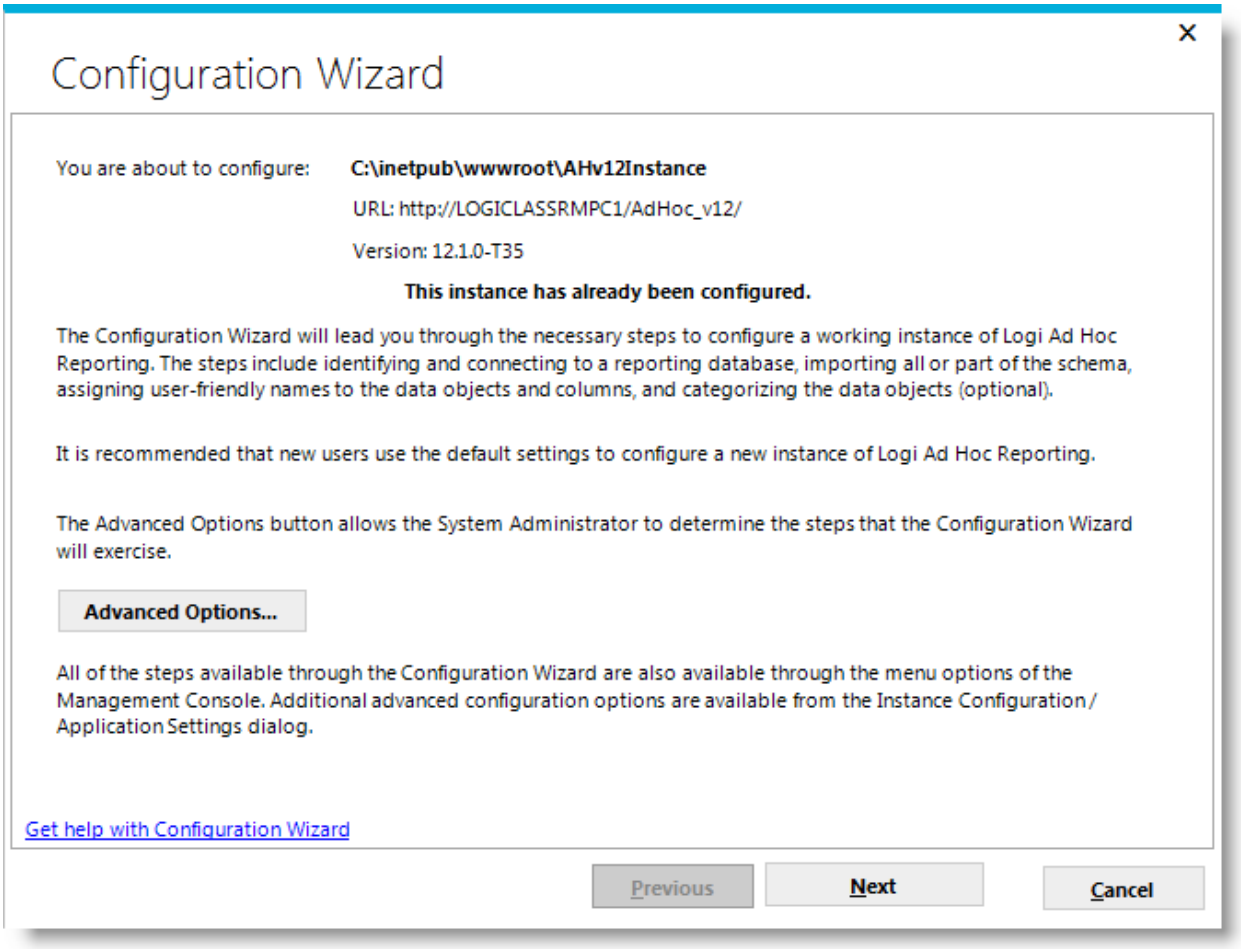
The Configuration Wizard can be launched in several ways in the MC:

- Click **Welcome** and either the **new Ad Hoc Instance** link or the **Configuration Wizard** link.
- Click **Getting Started** and then **Configuration Wizard**
- Click **Instance Configuration** and then **Configuration Wizard**

*All of the core dialog boxes of the Configuration Wizard may be run individually by clicking on any of the actions displayed when the **Instance Configuration** action group is clicked.*

Note:
When the Configuration Wizard is launched, it determines what “needs to be done” for the instance. For example, if there is no active instance the “New Instance” dialog box is launched. The Configuration Wizard’s typical initial dialog box is displayed below.

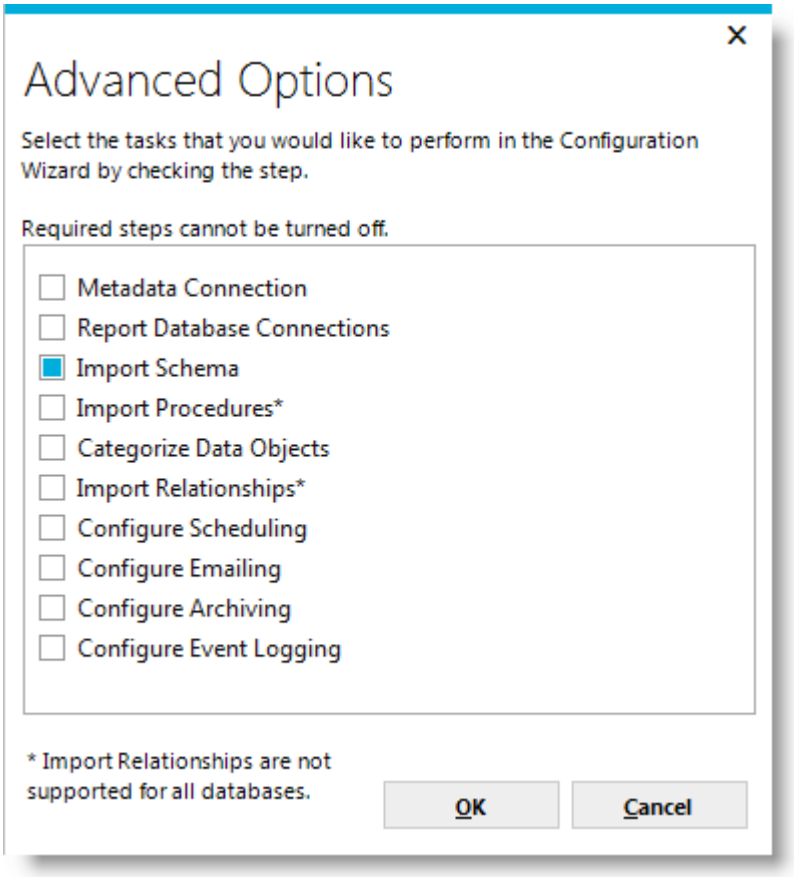
The first formal dialog box the **Configuration Wizard** displays identifies the instance and gives an indication of the areas that may need to be addressed:



The **Advanced Options…** button allows the System Administrator to pick the configuration options that the Configuration Wizard will address. The Configuration Wizard will always, by default, present the dialog boxes necessary to complete the minimum requirements for a working instance of Ad Hoc.

Java -
The URL of the Ad Hoc instance will not be displayed in the dialog box.

The **Advanced Options** dialog box is shown below:



The configuration steps that require completion will be indicated.

Metadata Connection allows you to change and test the metadata database connection string.

Import Schema allows you to import and manage the metadata database content related to the reporting database schema.

Categorize Data Objects allows you to create categories of data objects and assign data objects to them.

Import Relationships allows you to import join relationship information from the reporting database to the metadata database.

Configure Scheduling allows you to identify the scheduling method, provide credentials, and enable scheduling for each reporting database connection.

Configure Emailing allows you to identify an SMTP server, provide credentials, and configure the email notification for each reporting database connection.

Configure Archiving allows you to identify the archive repository and format, and to enable archiving for each reporting database.

Configure Event Logging allows you to connect to a logging database, enable logging, and select the events to be tracked.

Each of these options is documented in their respective sections of this document.

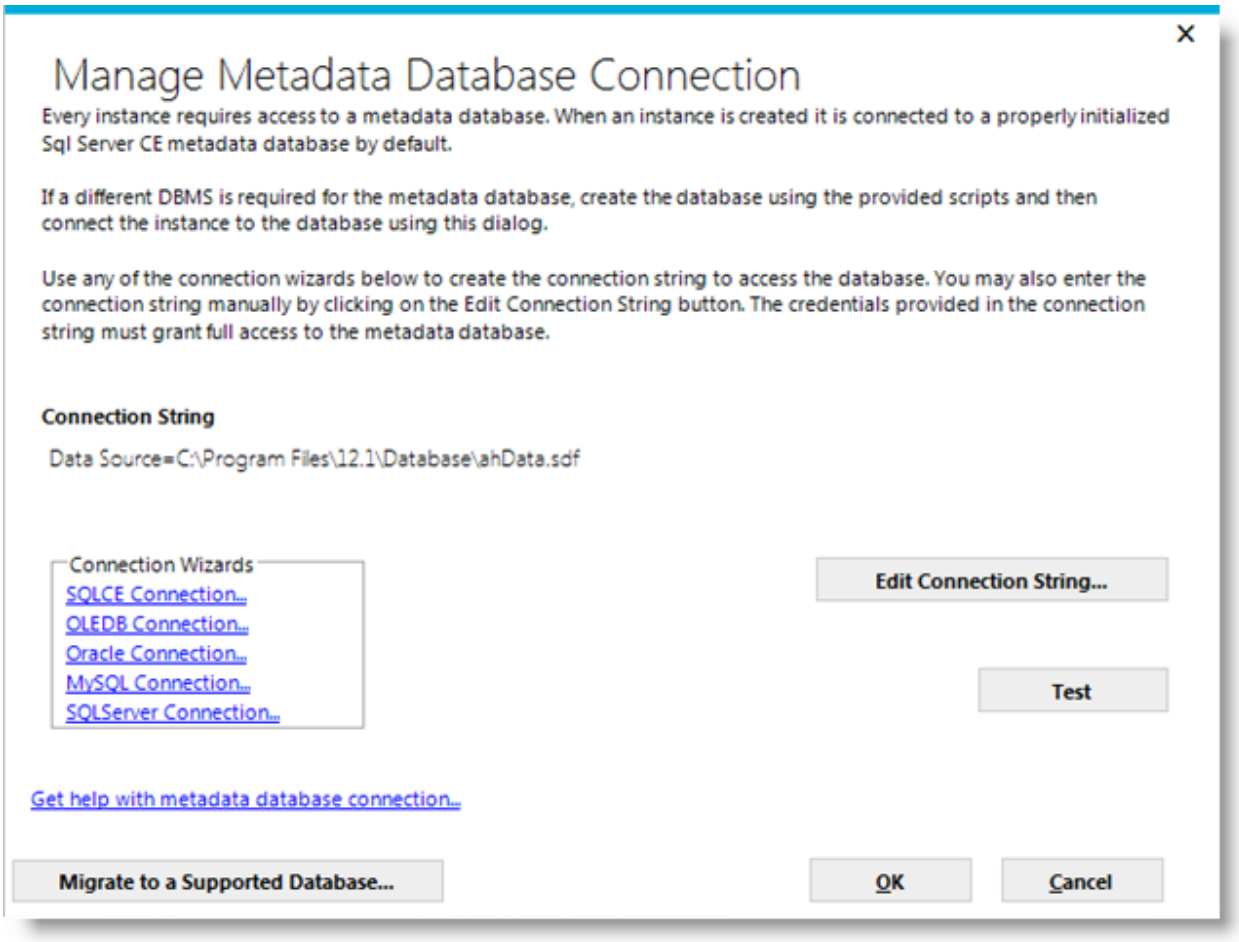
Click **Next** to step through the identified Configuration Wizard processes.

Metadata Connection

Before establishing an instance of Ad Hoc, the System Administrator needs to determine the best repository for the Ad Hoc metadata. By default, Ad Hoc uses a SQL Server CE database. The System Administrator may decide that SQL Server, Oracle, or MySQL would be more appropriate in their computing environment.

Prior to connecting an alternative metadata database, the System Administrator must build the database. As part of the Ad Hoc installation, scripts are provided that assist in the creation of the database. The scripts are located in the `Database` folder of the installation folder. Application of the scripts is fully documented in the *Logi Ad Hoc Reporting Creating/Updating the Metadata Database Schema* document, also located in that folder.

Once the database has been established, the System Administrator can configure the Ad Hoc instance in the MC to use the new metadata database by clicking **Instance Configuration** and then clicking **Metadata Connection**. The following dialog box will be displayed:



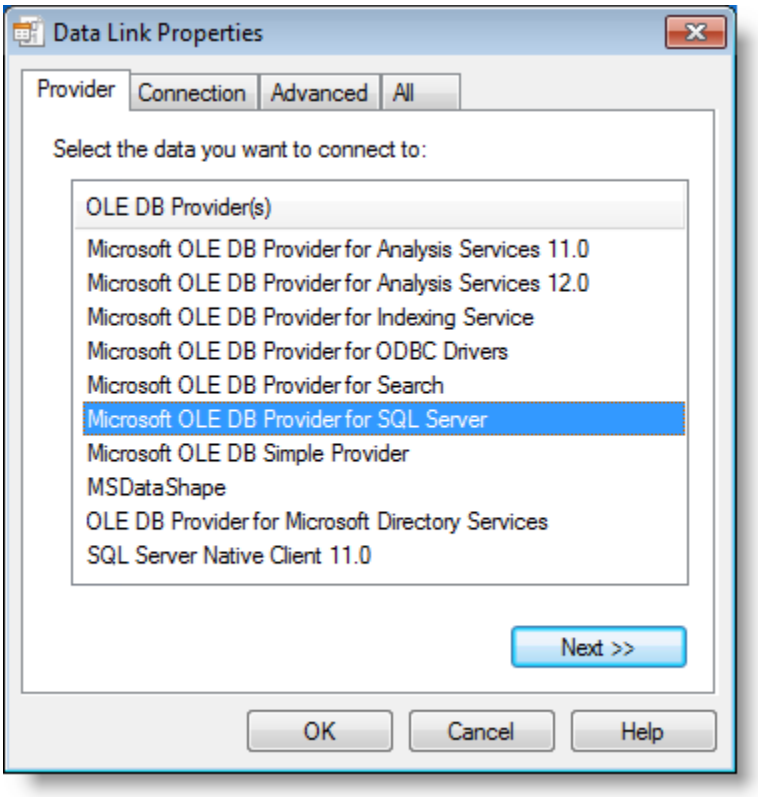
Note:
This operation should only have to be performed once. Typically, the only time this option is used after the initial configuration is in the event the credentials or the location of the metadata database changes.

Java -
The supported metadata DBMSs are Oracle and MySQL. Connection links will be displayed for these DBMSs. The metadata database must have been previously created. Scripts are provided in the Database folder of the Ad Hoc instance and the Management Console for this purpose.

The general usage of this dialog box is to 1) build a connection string to the metadata database using any of the connection links provided, or enter the string manually; and 2) test the connection string.

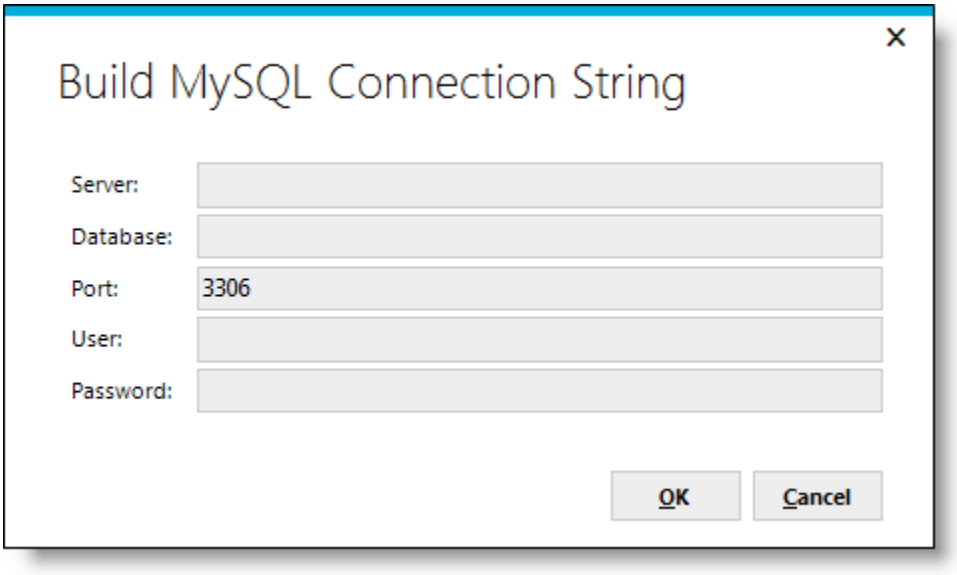
The **Migrate to a Supported Database…** button allows the System Administrator to migrate the metadata to a different metadata database. The most common use of this is when you wish to convert the metadata from the default SQLCE database to SQL Server, Oracle or MySQL. As outlined above, the target database should be established with the scripts provided prior to the migration.

The **OLEDB Connection** link displays the **Data Link Properties** dialog box:



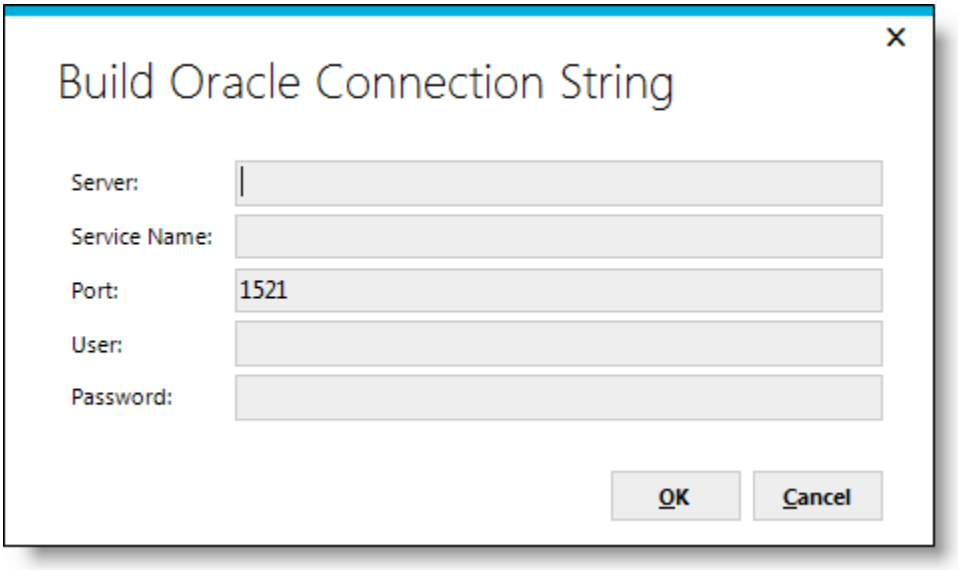
Complete the information in the *Provider* and *Connection* tabs and click **OK** to return to the **Metadata Database Connection** dialog box.

The **MySQL Connection** link presents the **Build MySQL Connection String** native provider dialog box:



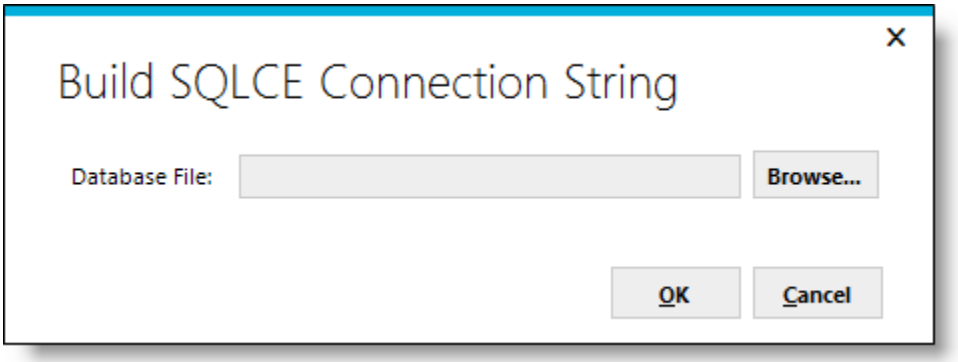
Fill-in the required information and click **OK** to return to the **Metadata Database Connection** dialog box.

The **Oracle Connection** link presents the **Build Oracle Connection String** native provider dialog box:



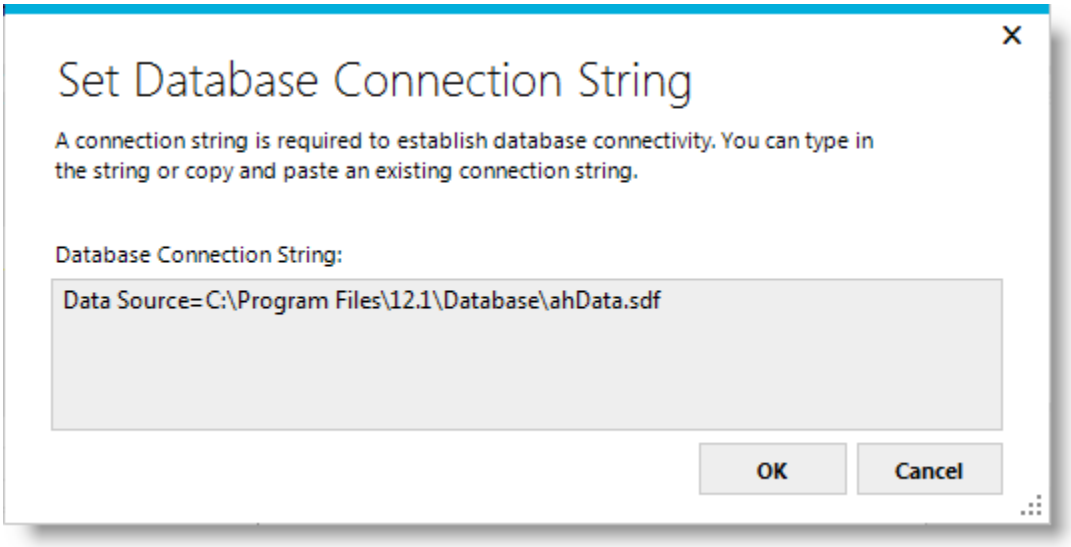
Fill-in the required information and click **OK** to return to the **Metadata Database Connection** dialog box.

The **SQLCE Connection** link presents the **Build SQL CE Connection String** dialog box:



Either enter the fully-qualified path to the `ahData.sdf` file, or click **Browse** to navigate to and select it. Click **OK** to return to the **Metadata Database Connection** dialog box.

As an alternative to using any of the provided links to specify the connection string to the metadata database, the System Administrator can click the **Edit Connection String…** button and manually enter a connection string. The **Set Database Connection String** dialog box looks like this:



This approach is particularly useful when the connection string is known or the changes to the string are minor, such as credential changes. Click **OK** to return to the **Metadata Database Connection** dialog box.

To verify that the connection string is directed to a valid database, click **Test**.

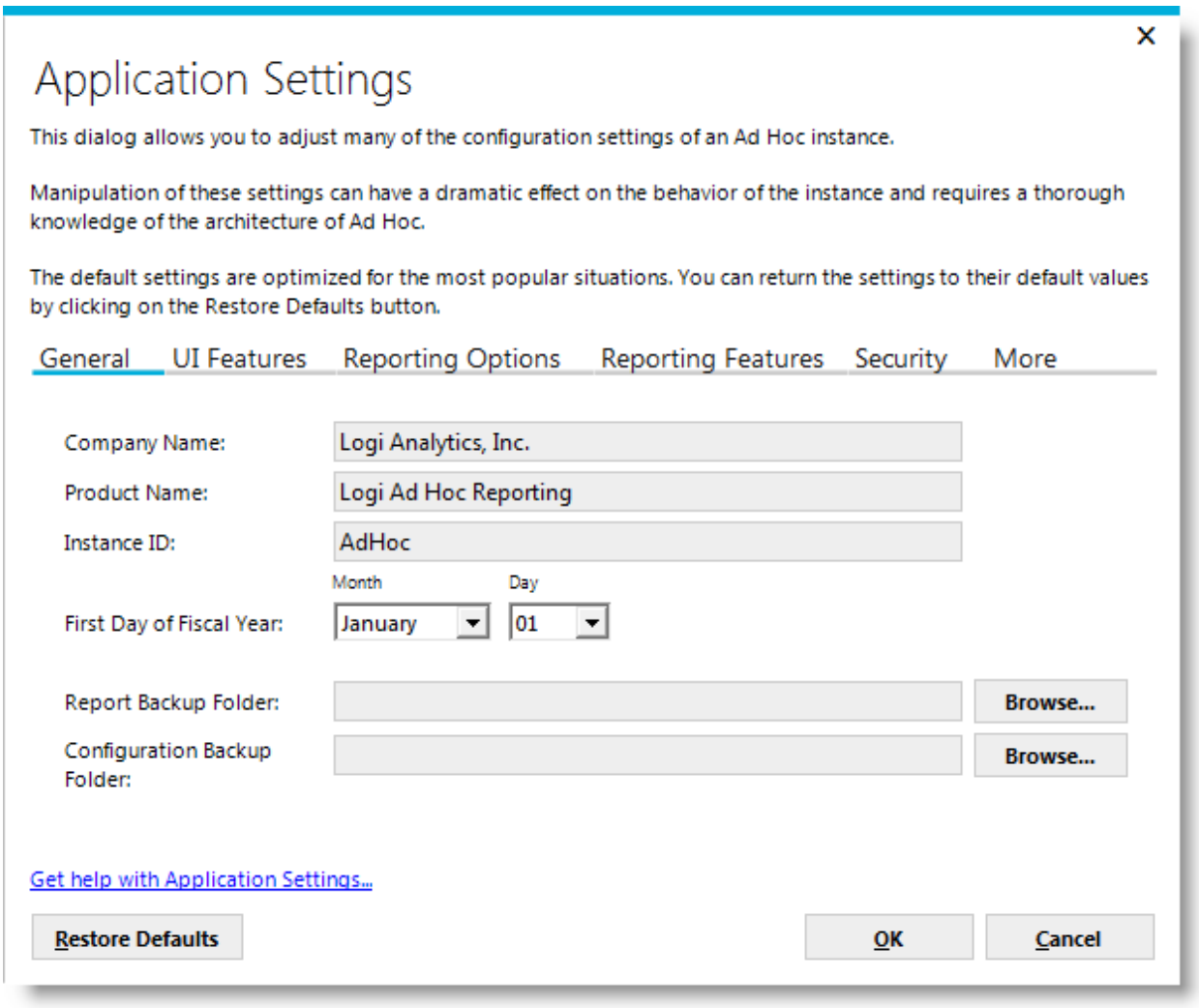
Click **OK** to post the connection string to the `_Definitions/_Settings.lgx` file in the active instance folder.

Notes:
The credentials supplied in the connection string for the metadata database must provide "Administrator-like" permissions to the database. The system must be able to insert, update and delete data, as well as alter the schema of the metadata database.

Whenever an alternate metadata database is created and connected to an instance, it is imperative that the Upgrade Manager be launched to check for any new, required information such as Rights. Click Manage an Instance and Upgrade Instance to launch the Upgrade Manager.

Application Settings

The Application Settings dialog box allows the System Administrator adjust the core configurations for the active instance:



The settings are organized into six tabs.

The *General* tab is used to brand the active instance with company information, set the internal identification of the instance, set the fiscal year start date, and specify the locations of backup folders.

The *UI Features* tab is used to control various aspects of the user interface for the active instance.

The *Reporting Options* tab is used to change where report definitions are stored.

The *Reporting Features* tab is used to set the report encoding format and the default date reformat, and to enable the "live preview" feature and debugging.

The *Other Features* tab provides easy access to configuration of scheduling, email, archiving, event logging, and the use of organizations within the active instance.

The *Security* tab is used to set options related to password management and strength.

To reset Application Settings values back to their original configuration, click **Restore Defaults**.

When all of the application settings have been specified, click **OK** to save the values.

The individual tabs shown above are described in more detail below.

General Tab

The *Company Name* value will be displayed in the caption of the browser window when a report is run.

The *Product Name* value will be displayed in various dialog boxes and captions in the MC as well as in the Configuration page of the Ad Hoc user interface.

The *Instance ID* value is used to differentiate between instances of Ad Hoc for the Logi Ad Hoc Scheduler service.

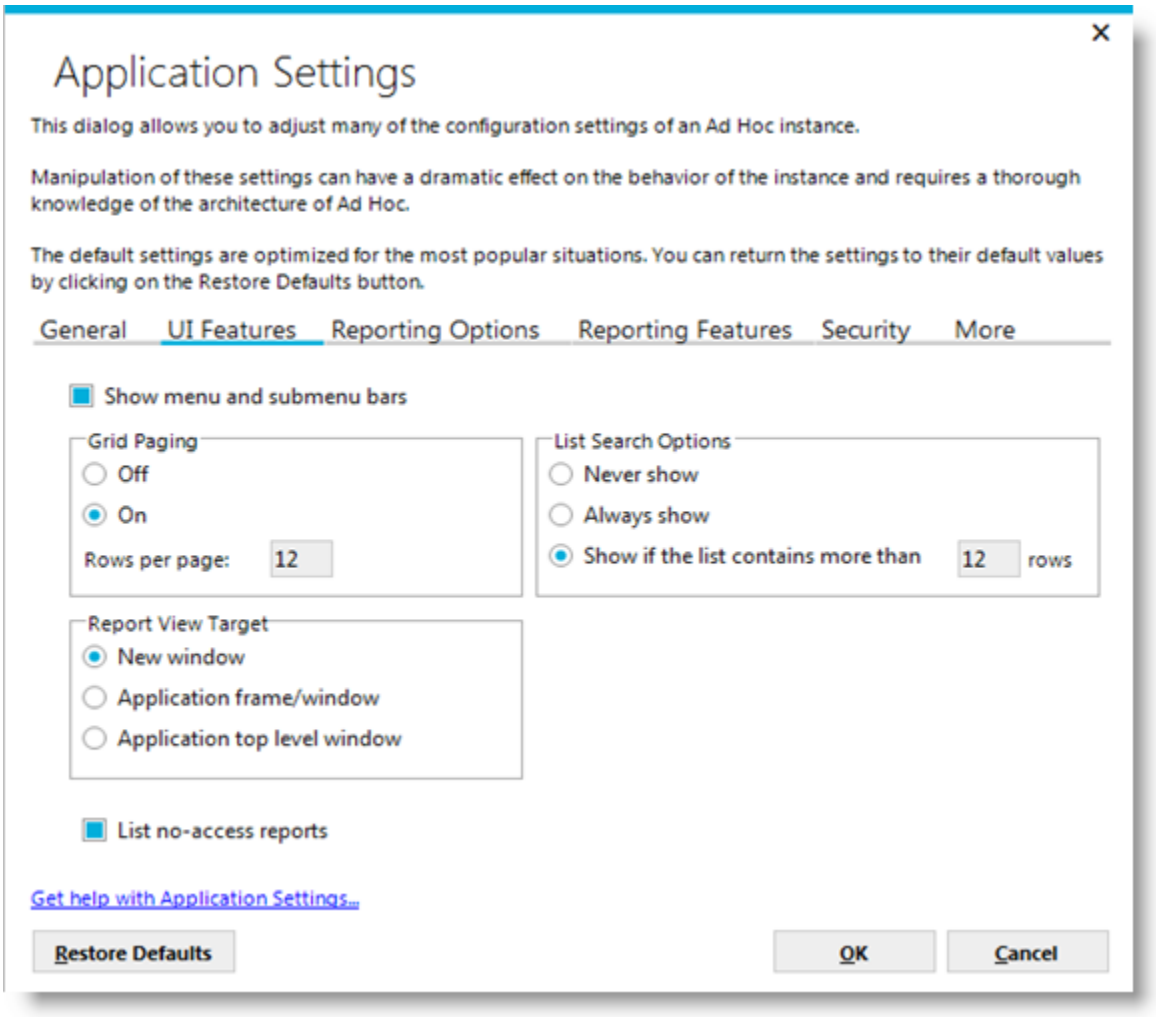
The *First Day of the Fiscal Year* value is the basis for all of the named "fiscal" functions in Ad Hoc.

The *Report Backup Folder* value is an alternate location for changed or deleted report definitions. The default location is the `_Definitions/_Reports/_Backup` folder.

The *Configuration Backup Folder* value is an alternate location for the configuration backup(s) that contain the `_Settings.lgx` file and the metadata databases, if the default metadata database is used. The default location is in the `Database` folder.

UI Features Tab

Clicking the *UI Features* tab will display the following:



Show menu and submenu bars allows the System Administrator to control the display of the elements at the top of the Ad Hoc user interface. The logo, reports, profile, configuration, and other elements of the top menu bar are all affected.

Grid Paging determines if and when a paging control will be displayed to help navigate grids.

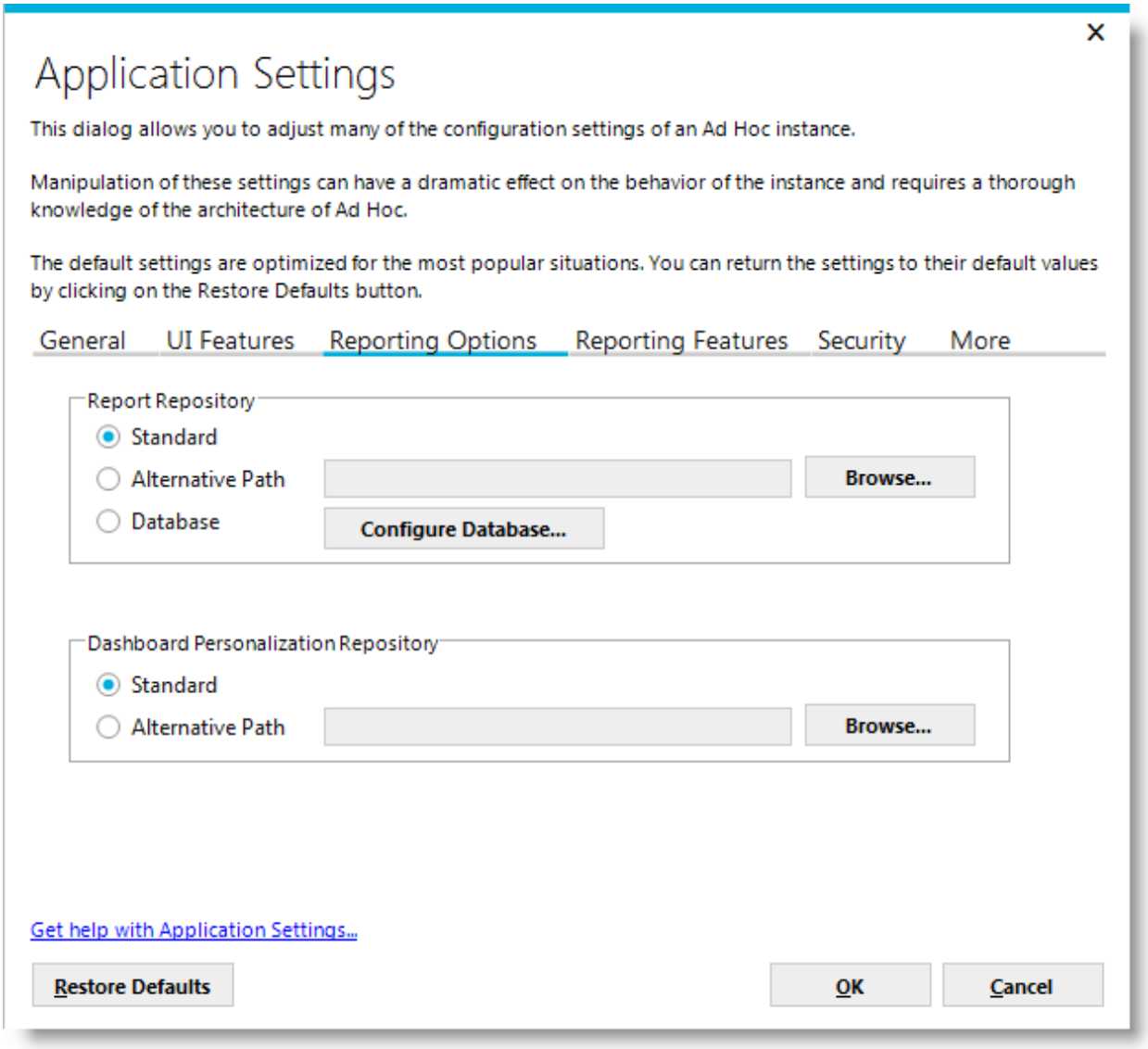
Report View Target determines how the browser should behave when a report is run.

Search Box determines if the search function is enabled and when it should be displayed.

The *List no-access reports* option determines whether restricted reports are shown in the report lists as “disabled” or not shown at all.

Reporting Options Tab

Clicking on the *Reporting Options* tab will display the following:



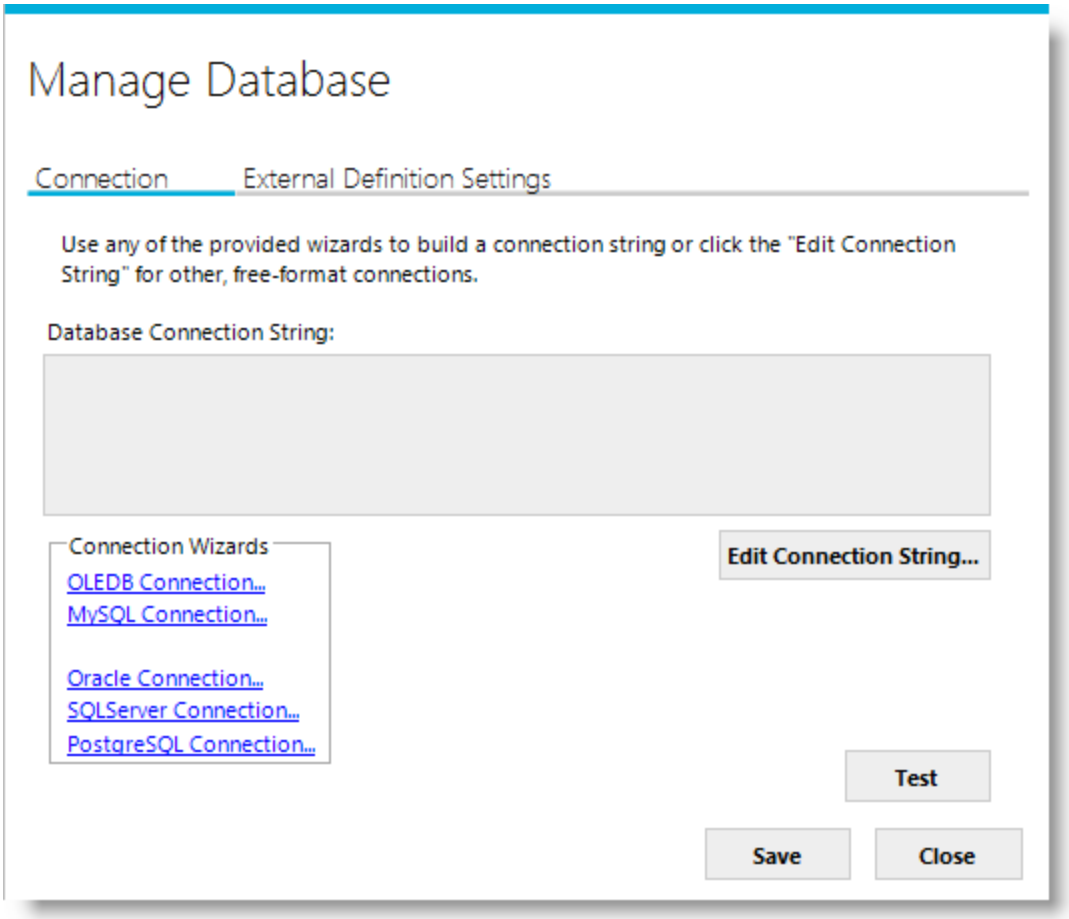
The Report Repository options control the storage location of the report definitions. The ability to specify alternate folder locations for application-generated files compliments installations that utilize a distributed server configuration for load balancing. This would normally be an installation of Ad Hoc some place accessible by all other instances.

- The *Standard* default location is the `_Defintions/_Reports` folder.

- An *Alternative Path* for the report definitions can be set by clicking the adjacent **Browse** button and either selecting or creating a target folder in the **Browse for Folder** dialog box. If this option is selected, then the *Alternative Path* option must also be selected in the next control set.
- The *Database* option allows the report definitions to be stored in a database. Prior to configuring this option, the System Administrator must create a table in a supported DBMS with two columns; one to store the report name and the other the report definition.

Personal dashboard preferences are stored in files in the `ahSavedDashboards` folder by default. To facilitate the configuration of Ad Hoc for a clustered environment, the System Administrator can specify an *Alternative Path* for the *Dashboard Personalization Repository* by clicking the adjacent **Browse** button and either selecting or creating a target folder.

Clicking the **Configure Database…** button will display the following dialog box:

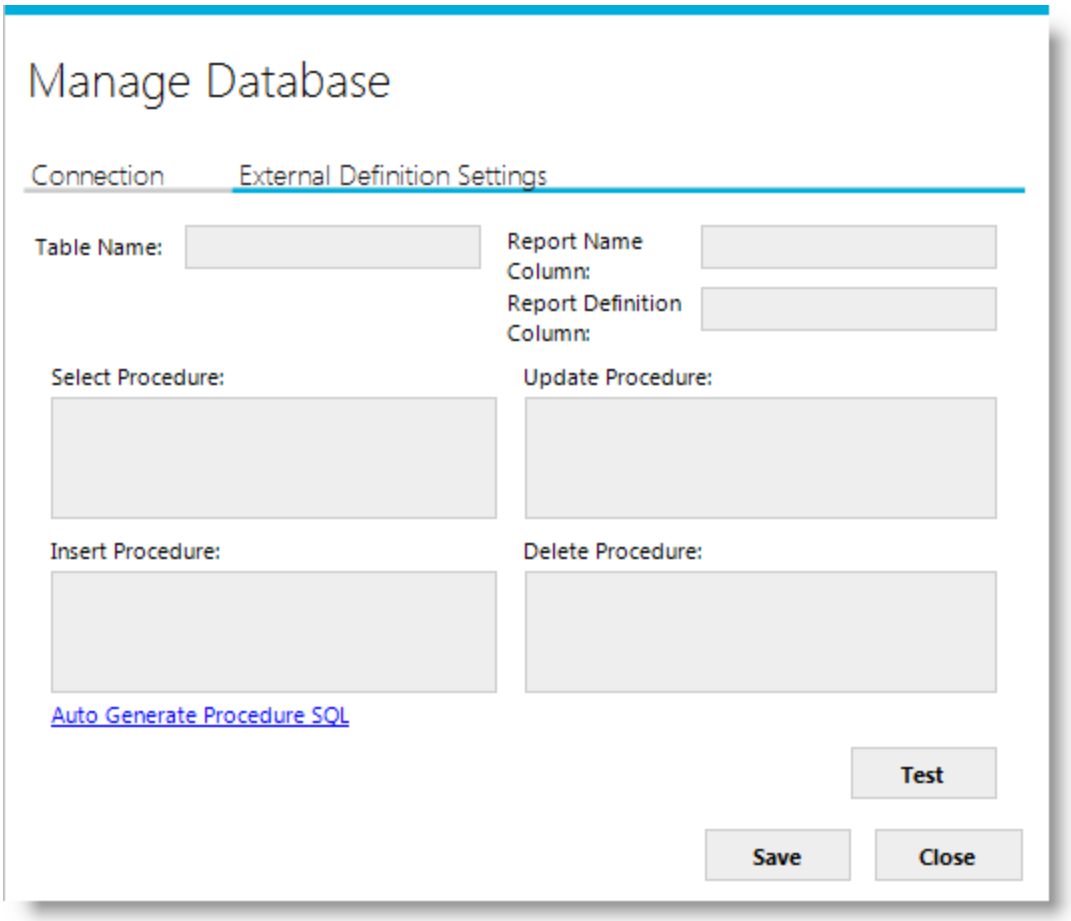


The *Connection* tab allows the System Administrator to specify a connection string to the database of a table intended to store the report definitions. Supported DBMS's include SQL Server, Oracle and MySql.

The credentials supplied in the connection string to the reporting repository must provide sufficient permissions to execute SELECT, INSERT, UPDATE and DELETE statements on the specified database/table.

Note:
A valid database connection must be established before the External Definition Settings can be validated and saved.

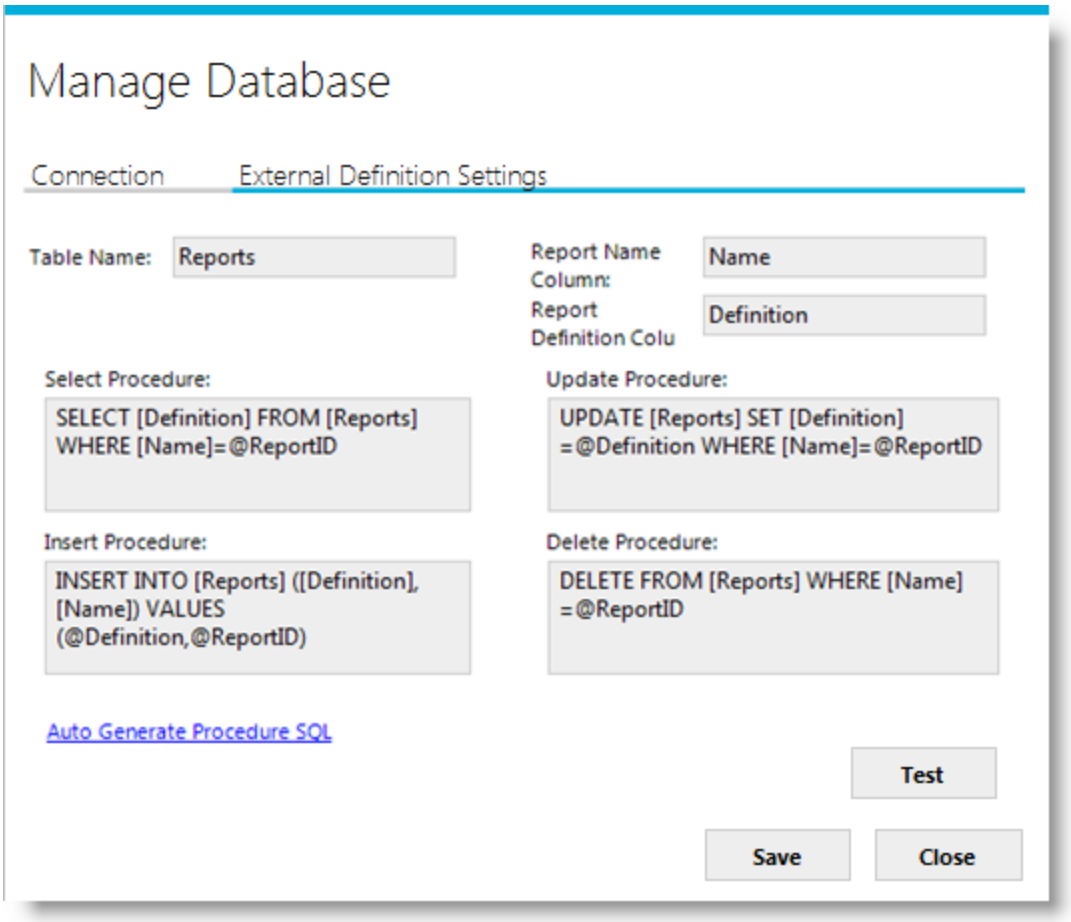
The *External Definition Settings* tab identifies the table and columns to be used as the report definition repository and the SQL statements used to manage the information:



Once the *Table Name, Report Name Column* and *Report Definition Column* have been specified, clicking **Auto Generate Procedure SQL** will populate the four SQL management statements to be used to maintain the new table.

Note:
The MC will generate the SQL procedures for the three supported databases: SQL Server, Oracle and MySql. Other databases may be used; however, the System Administrator will be required to enter the management procedures manually.

As an example, after clicking on the **Auto Generate Procedure SQL** link for a SQL Server database "ReportDefinitions" table that has "FileName" and "Definition" columns, the *External Definition Settings* tab would appear as:



Although the syntax varies by DBMS, the Report Name column data type should be the equivalent of varchar(255) and the Report Definition column data type should be the equivalent of varchar(max) or a memo field.

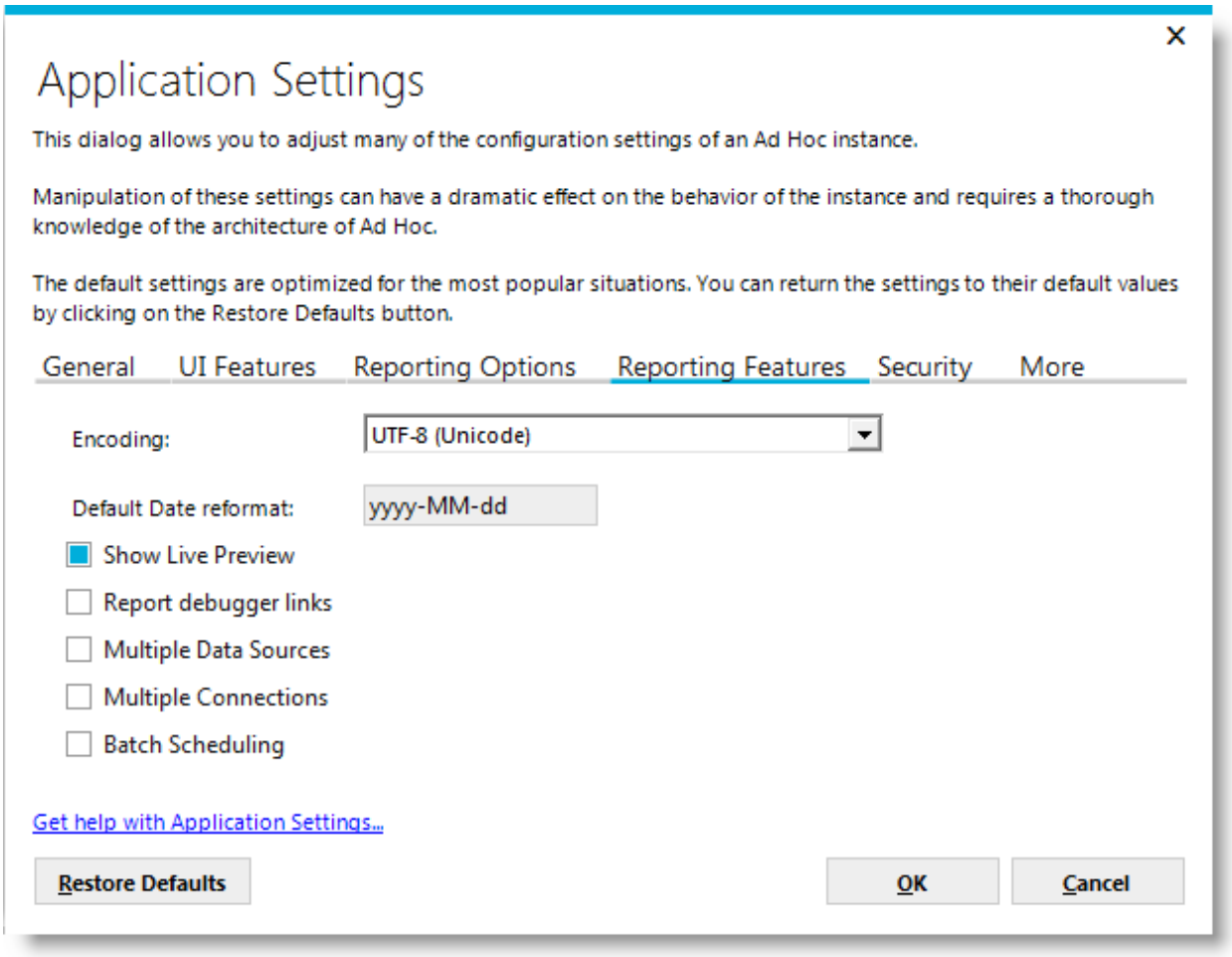
Check the *Move existing reports to database* checkbox to have the report definitions moved from the file system to the database repository.

Click **Save** to retain the information in the `_Settings.lgx` file of the active instance and return to the Application Settings dialog box.

Note:
The physical report definition files are deleted from the `_Definitions/_Reports` folder upon successful completion of the configuration. Additionally, when this option is enabled the option to modify published reports will be disabled**.**

Reporting Features Tab

Clicking the *Reporting Features* tab will display the following:



The *Encoding* drop-down list allows the System Administrator to set the encoding type for the report definitions. The default encoding is UTF-8. This value is placed in the XML tag at the top of report definition files.

The *Default Date reformat* value determines the internal format of dates that are passed in the application. This does not impact the displayed date format, which is based on browser settings.

The Live Preview feature may be enabled by checking the *Show Live Preview* checkbox. Live Preview presents a panel in the Ad Hoc Report Builder that displays a portion of the report as it is being defined.

Report debugger links allows the System Administrator to enable report debugging. When this is enabled, a debug icon will be displayed at the bottom of all reports that are run; clicking it will display a debug page.

Multiple Data Sources allows the end-user to base reports on more than one data source. Typically reports are based on a single data source.

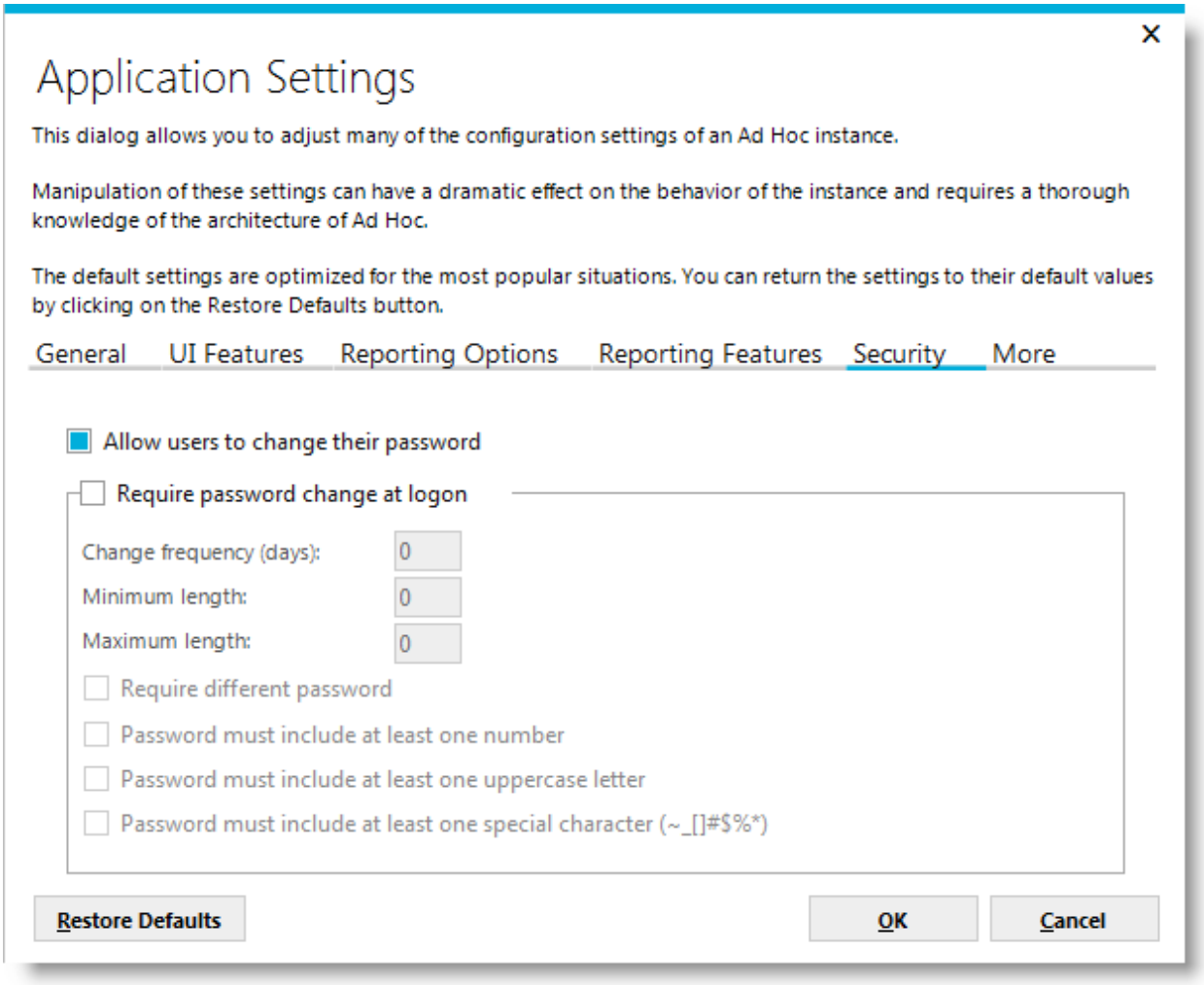
Multiple Connections enables the option to include data from different reporting databases in a report. In the Report Builder interface of Ad Hoc, the database filter will offer an "(All)" option. When the "(All)" option is selected during report creation, the end-user is given the option to select data objects and columns for the display elements from any of the reporting databases to which the user has access.

Note:
If the Multiple Connection option is enabled, the ability to enable/disable scheduling, email, and archiving on an individual reporting connection basis is removed. In other words, these three features are enabled /disabled for all reporting connections used in the instance.

Batch Scheduling changes the default behavior of Ad Hoc as it relates to processing scheduled reports that rely on external session parameters. The default behavior is to process the report for each subscribed user, replacing the session parameter values required by the report with the ones that are saved for the subscriber. This implies that the report will be run once for each subscriber. With *Batch Scheduling* enabled, the report will be run once for each unique set of session parameter values. In other words, all subscribers to the report that share common session parameter values will receive the results of a single report execution. This has the potential to reduce the processing load for the scheduled report.

Security Tab

Clicking on the *Security* tab will display the following:

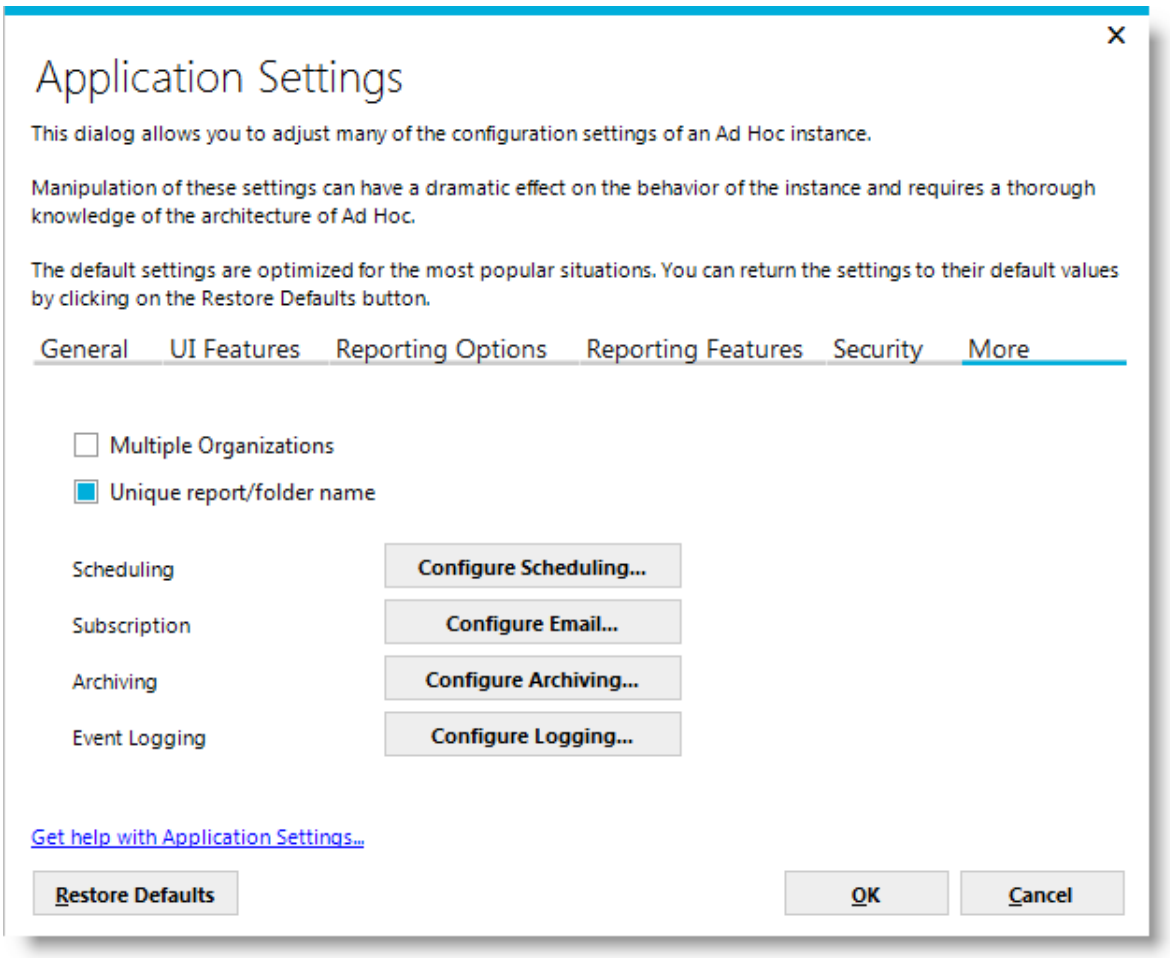


The System Administrator can determine if users are permitted to change their passwords through the Ad Hoc user interface by checking the *Allow users to change their password* checkbox.

Users may be forced to change their password by checking the *Require password change at logon* checkbox. The time between required password changes may be set in the *Change frequency* attribute. The remaining attributes impact the password strength dictated by the company security requirements.

More Features Tab

Clicking the More Features tab will display the following:



The *Multiple Organizations* checkbox controls whether the user community for the instance should be divided into Organizations. Ad Hoc treats organizations like separate companies, restricting reports from being shared across organizations. Every Ad Hoc user must be a member of one and only one organization.

The *Unique report/folder name* checkbox controls whether duplicate report and folder names are permitted in the instance. If enabled on an instance containing duplicate folders and/or reports, a dialog box will be shown that allows the System Administrator to adjust the names.

This tab also provides quick links to configure scheduling, email, archiving and logging. Each of these features is documented elsewhere in this document.

Scheduling

Ad Hoc supports the scheduled execution of reports. The System Administrator must configure the Ad Hoc instance to enable scheduling. There are two major steps in the configuration of scheduling; setting the credentials for the scheduler and enabling scheduling for each database connection.

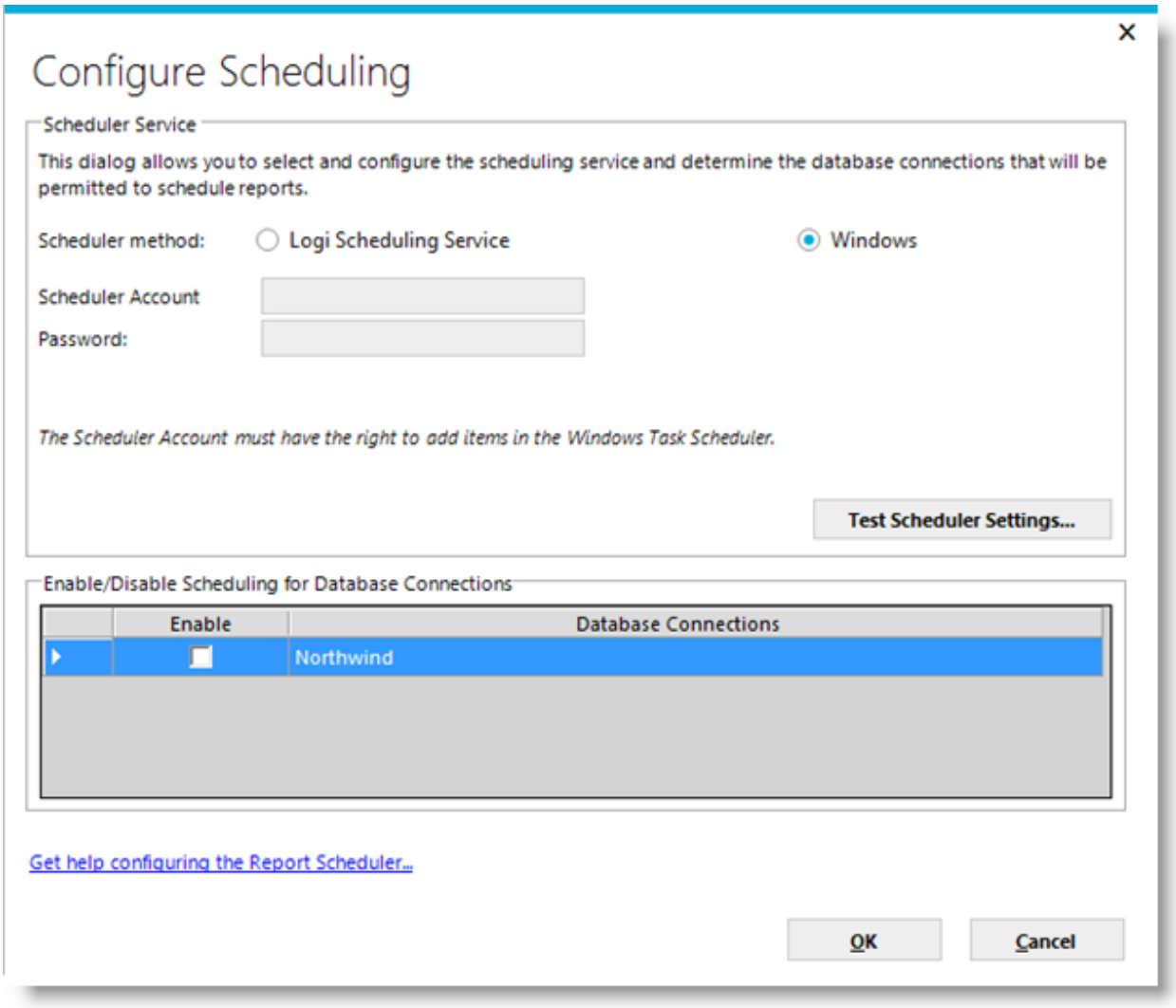
Note:
Scheduling refers to the unattended execution of a report and configuration of the scheduling service. Delivery of a scheduled report to end users is handled through email. Refer to the Emailing section of this document for configuration information for an SMTP server.

Both the scheduler service and SMTP server access must be configured and enabled for reports to be scheduled through the Ad Hoc interface. If configured properly and enabled, the "Schedule" action will be available on the report list page of the instance.

The **Configure Scheduling** dialog box can be accessed by:

- Clicking **Instance Configuration** and then **Scheduling.**
- Running the **Configuration Wizard** and selecting *Scheduling* under the **Advanced Options** button.
- Clicking **Instance Configuration**, then **Application Settings**, then the *Other Features* tab, and then the **Configure Scheduling** button.

The **Configure Scheduling** dialog box will be displayed:



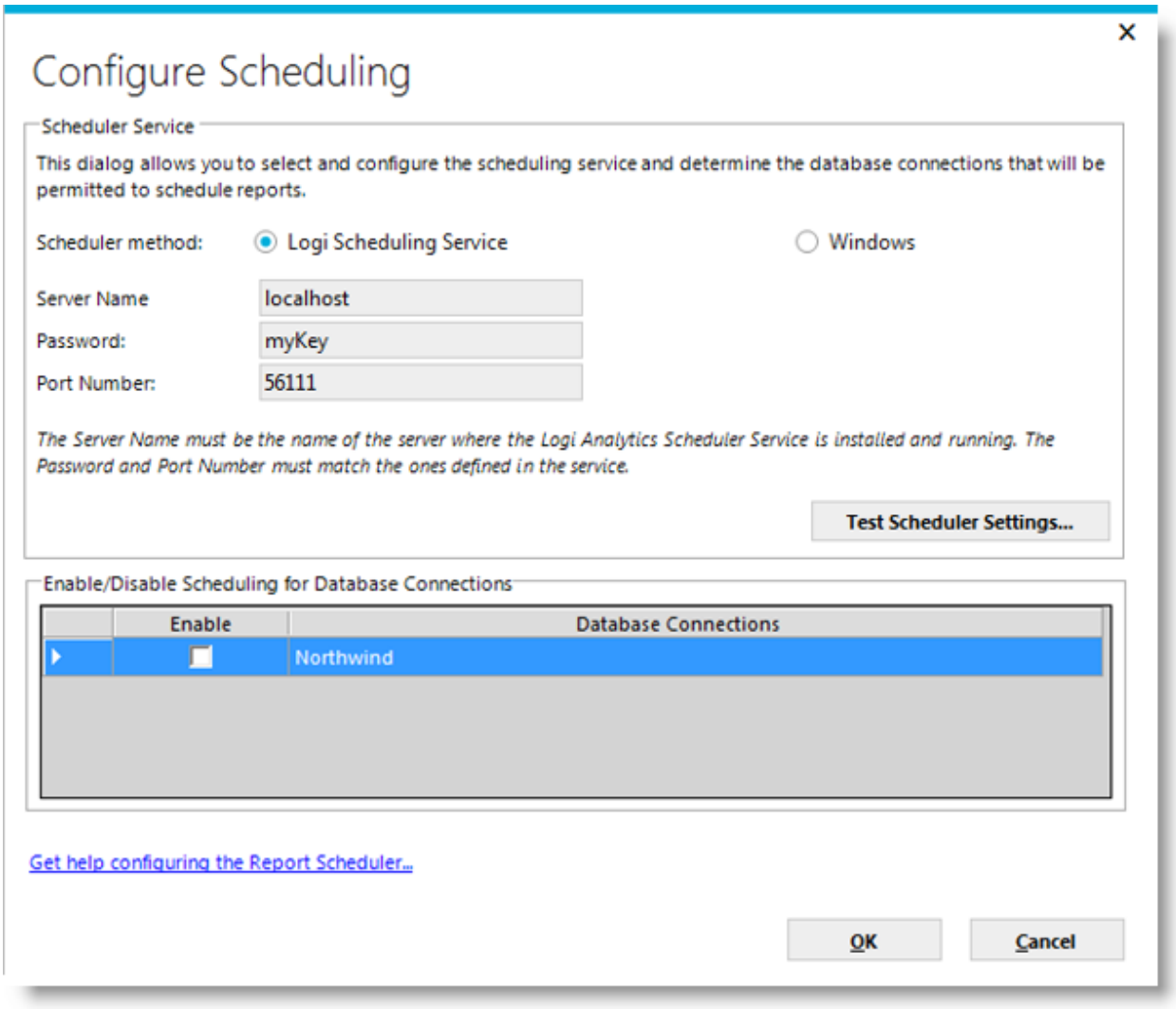
The first decision for the System Administrator will be to use either the *Windows Task Scheduler* or the *Logi Ad Hoc Scheduler Service.* The primary benefits of using the *Logi Ad Hoc Scheduler Service* are that 1) it supports scheduling in a clustered environment; and 2) it makes schedules easier to move in the event the instance is migrated to a different server.

If the *Windows Task Scheduler* (WTS) is chosen, the dialog box displayed above will need to be completed.

The *Scheduler Account* and *Password* provided must provide "Administrator" permissions to the WTS sufficient to create, update and delete schedules.

Java -
The Logi Scheduling Service is the only option available.

If the *Logi Ad Hoc Scheduler Service* is selected by clicking on the option, the dialog box will change to:



The *Server Name* is the server where the Logi Ad Hoc Scheduler Service is installed.

The *Password* and *Port Number* must match the attributes in the `_Settings.lgx` file found in the root folder of the Logi Ad Hoc Scheduler Service. The following is the typical XML content of that file:

```
<Setting>
  <RemoteApi Port="56111" PassKey="myKey" />
</Setting>
```

The **Test Scheduler Settings** button uses the credentials provided to create and remove a test schedule to verify the information.

In the bottom of the dialog box is a panel with a list of database connections. Scheduling is managed at the reporting database level. To enable scheduling for reports based on a connected reporting database, check the checkbox associated with the connection name. To enable or disable scheduling for all connected reporting databases, click the *Enable* column header.

Note:

*If **Multiple Connections** is enabled, the list of reporting database will not be displayed. In this case scheduling may be enabled/disabled for the Ad Hoc instance, not by reporting connection.*

*For information about installing and configuring the Logi Scheduler, see the online document **Introducing the Logi Scheduler for Ad Hoc.***

Click **OK** to confirm the scheduling configuration information.

Switching Between Schedulers

In most environments, once the scheduler service has been configured and users have scheduled reports, the environment doesn't typically change. However, there may be a good reason to switch from one scheduler service to another.

Mechanically, the process is very simple and can be accomplished by selecting the opposite scheduler service and providing the necessary credentials.

In that event, the MC will migrate the schedule information to the target scheduler service. The WTS scheduler retains scheduling information on the server. The Logi Scheduler retains the information in a database within the physical folder of the service.

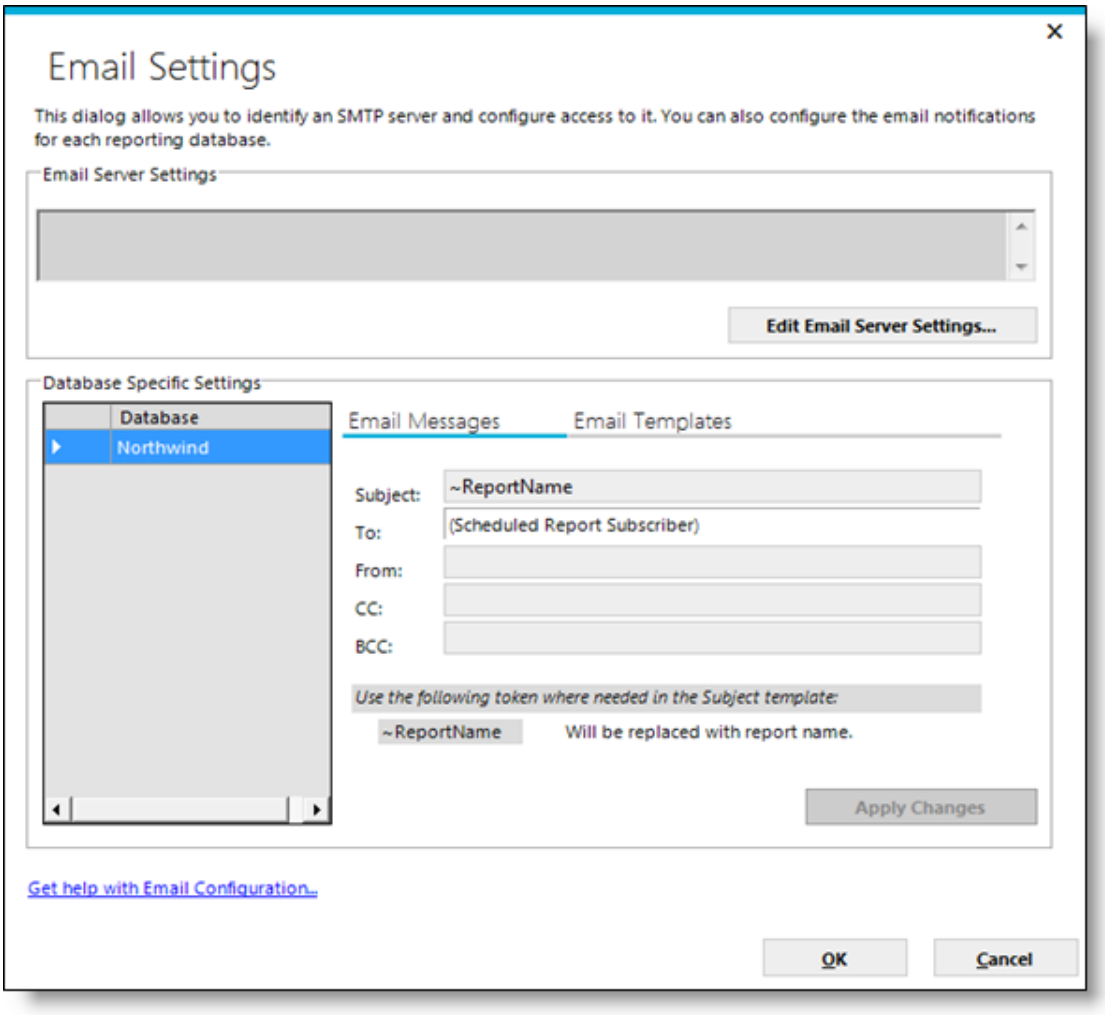
Emailing Reports

Ad Hoc delivers scheduled reports and other notifications via email. The two core configuration steps related to emailing are 1) identification of, and credentials for, an SMTP serve; and 2) configuring the email notifications for each reporting database connected to the instance.

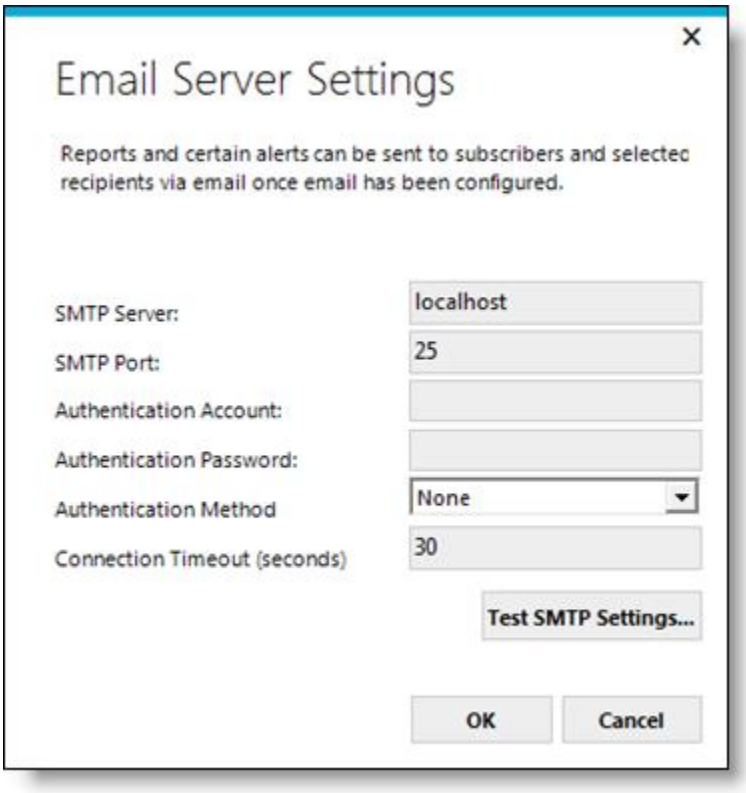
The **Email Configuration** dialog box may be accessed by:

- Clicking **Instance Configuration** and then **Emailing;**
- Running the **Configuration Wizard** and selecting *Emailing* under the **Advanced Options** button;
- Clicking **Instance Configuration**, then **Application Settings**, then the *Other Features* tab, and then **Configure Emailing**;

The **Email Configuration** dialog box will be displayed:

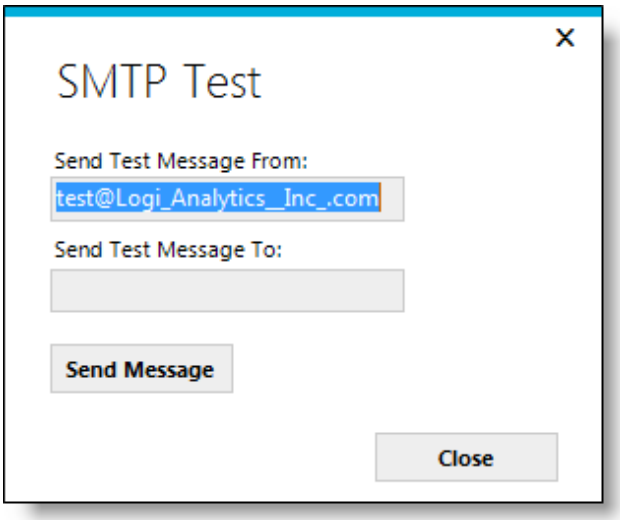


The *Email Server Settings* frame will display the configuration information for the SMTP server. To identify the SMTP server and set the access credentials, click **Edit Email Server Settings**. The **Email Server Settings** dialog box will be displayed.



The System Administrator should have the SMTP server configuration settings available in order to complete the dialog box. The SMTP server credentials must be sufficient to permit sending emails via relay.

Click **Test SMTP Settings** to verify the configuration by sending a test email to an email address. The **SMTP Test** dialog box will be displayed:



Enter the “From” and “To” addresses and click **Send Message** to verify the SMTP settings. Click **Close** to dismiss the dialog box. Click **OK** to save the SMTP configuration settings and return to the **Email Configuration** dialog box.

The *Database Specific Settings* frame allows the System Administrator to configure email notifications for each reporting database connected to the instance.

On the left is a list of the reporting databases. On the right is a tabbed dialog box that records email information for the selected reporting database.

Under the *Email Messages* tab, the System Administrator can set the Subject, “From” address, CC addresses, and BCC addresses.

Note:
If Multiple Connections is enabled, the list of reporting database will not be displayed. In this case scheduling may be enabled/disabled for the Ad Hoc instance, not by reporting connection.

The required *Subject* attribute is pre-populated with a special token (~ReportName) that will be replaced by the report name in the email. The subject line should retain this token, but may have additional information as well (e.g. “The ~ReportName Report. Powered by ACME”).

The required *From* attribute is expected to contain an email-like address, however, it does not have to be an actual address.

The optional *CC* and *BCC* attributes must contain valid email addresses. Multiple addresses can be entered and should be separated with a semi-colon or a comma.

The **Apply Changes** button is enabled when any of the attribute values have changed. Click **Apply Changes** to save the current values for the highlighted database.

Under the *Email Templates* tab are the paths to HTML templates for scheduled reports, archived reports, and broken subscriptions. The default location for each of the templates provided in the instance is the `ahEmail` folder.

By default, subscribers to a report will be notified if the report becomes “broken”. This behavior can be disabled by unchecking the *Email Subscribers when their Subscriptions are broken* checkbox.

Click **OK** to confirm any unsaved changes and dismiss the dialog box.

Note:
Emailing refers to the delivery mechanism for reports. The automated, unattended execution of reports is handled by a scheduler.

Both the scheduler service and the SMTP server access must be configured and enabled for reports to be scheduled through the Ad Hoc interface. If configured properly and enabled, the “Schedule” action will be available on the report list page of the instance.

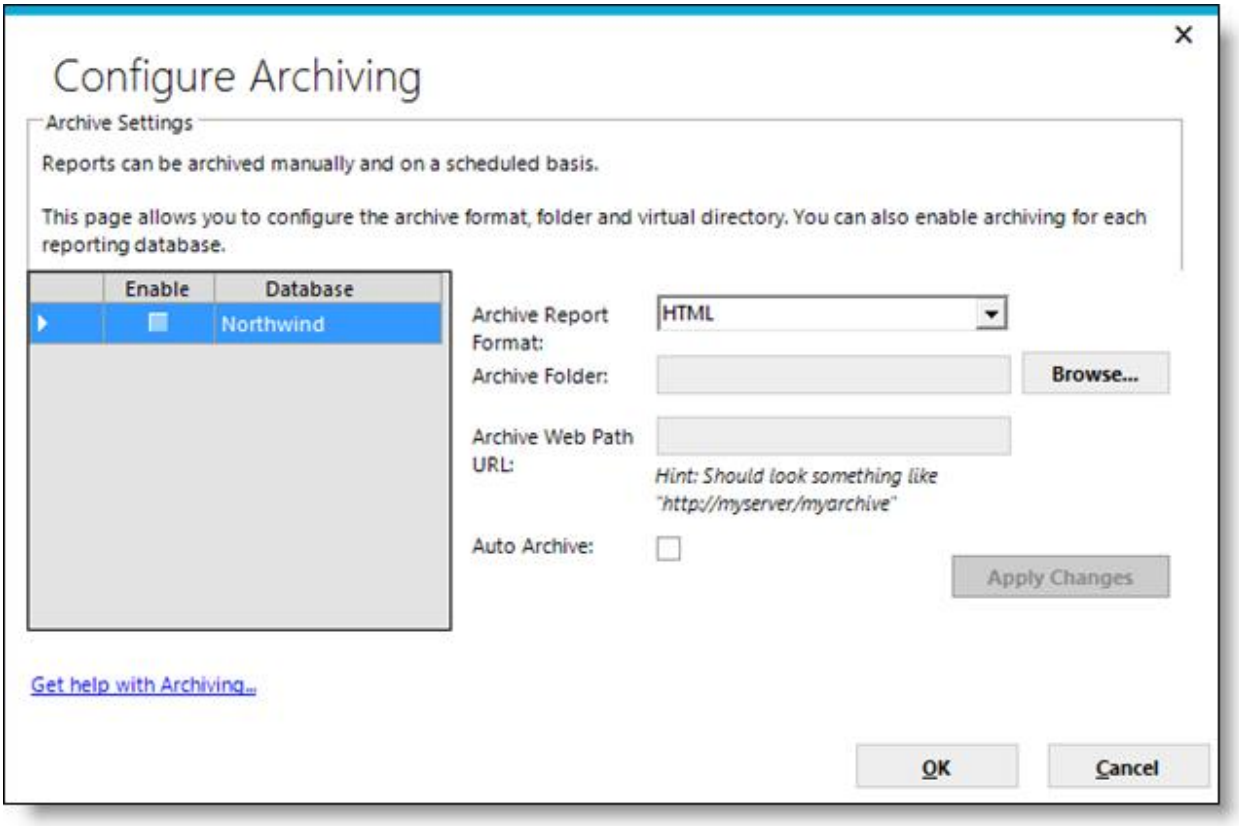
Archiving

Ad Hoc allows reports to be stored in an archive. The System Administrator must configure and enable archiving for this feature to be used. Typically, the System Administrator will create both a physical archive folder and a related virtual directory in IIS. After they have been created, archiving has to be enabled *for each database.*

The Configure Archive dialog box may be accessed by

- Clicking **Instance Configuration** and then **Archiving.**
- Running the **Configuration Wizard** and selecting *Archiving* under the **Advanced Options** button.
- Clicking **Instance Configuration**, then **Application Settings**, then the *Other Features* tab, and then the **Configure Archiving** button.

The **Configure Archiving** dialog box will be displayed:



The **Configure Archiving** dialog box allows the System Administrator to identify the reporting database, the physical archive folder, and the associated virtual directory, and to select the archive format and enable archiving for the reporting database.

On the left is the list of report databases connected to the instance of Ad Hoc. Archiving is configured and enabled at the database level. To select a database, click a row in the report database list. To select all report databases, click the upper left corner of the list.

To enable/disable archiving for all reporting databases, click the *Enable* header.

Note:
If Multiple Connections is enabled, the list of reporting database will not be displayed. In this case scheduling may be enabled/disabled for the Ad Hoc instance, not by reporting connection.

The *Archive Report Format* drop-down list will display the five archive formats: HTML, PDF, EXCEL, WORD, and CSV.

The *Archive Folder* attribute identifies the full path of the archive physical folder. Click **Browse** to either navigate to and select a folder, or create a new folder.

The *Archive Web Path URL* attribute identifies the web server and virtual directory for the archive.

The *Auto Archive* checkbox determines whether all scheduled reports will be automatically archived for the reporting database. The scheduling interface within Ad Hoc will have the Archive and Format controls pre-set and read-only if the *Auto Archive* checkbox is checked.

The **Apply Changes** button will become enabled when the information in the three attributes changes. Click it to record the changes to the archive information for the selected databases.

Click **OK** to confirm any unsaved changes and dismiss the dialog box.

Once the archiving parameters have been set, the Ad Hoc instance will enable the "**Add to Archive**" option from the schedule definition page and show a **Show Archive** action for each report in the report lists for which an archived report exists.

Note:
Each reporting database may have a unique archive physical and virtual folder and store the reports in a different format. They may also share the archive configuration.

Java -
The web server may have to be restarted after configuring the archive for the archiving functions to perform properly.

Event Logging

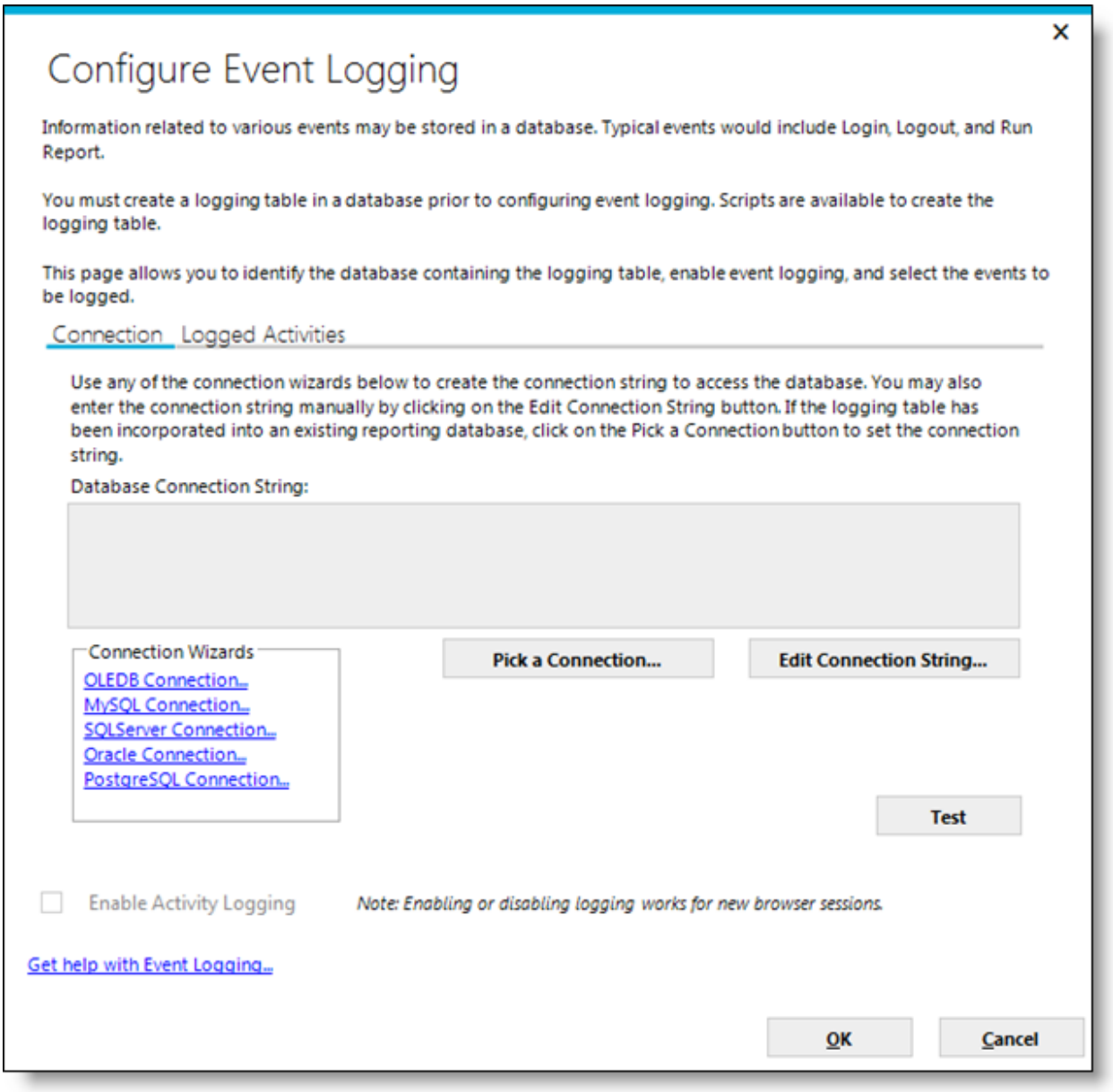
Ad Hoc permits the logging of key events, such as logging in, logging out, running a report, and creating a report, into a database. Events are recorded for an Ad Hoc instance, across all databases connected to the instance. The System Administrator must 1) manually create a logging table (AdHocLog) in a database; 2) connect the database to the Ad Hoc instance; and 3) enable logging for the instance.

Scripts are provided in the `Database` folder of the Ad Hoc instance for the creation of the *AdHocLog* table.

The Configure Event Logging dialog box may be accessed by:

- Clicking **Instance Configuration** and then **Event Logging.**
- Running the **Configuration Wizard** and selecting *Event Logging* under the **Advanced Options** button.
- Clicking **Instance Configuration**, then **Application Settings**, then the *Other Features* tab, and then **Configure Logging**.

The **Configure Event Logging** dialog box will be displayed:



Once the *AdHocLog* table has been created, a connection to the logging database must be created. The dialog box provides three techniques to identify the connection string for the logging database.

- Use one of the *Connection Wizard* links.
- Click **Edit Connection String** and manually provide the connection string.

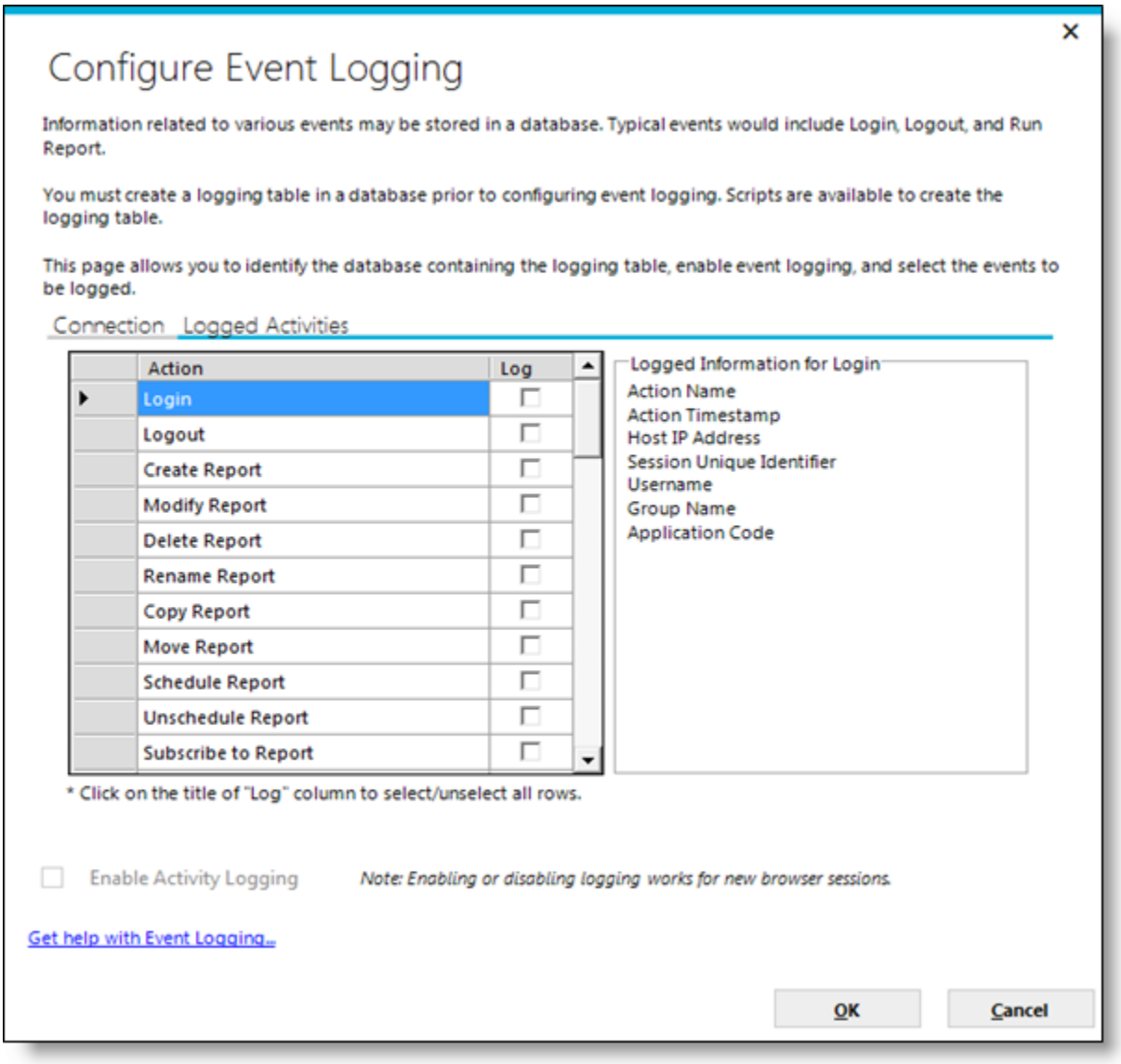
- Click **Pick a Connection** if the *AdHocLog* table was included in a database previously connected to the instance.

Java -
The available connection links may be different.

As always, click **Test** to verify that the connection information supplied is valid. The **Test** button will verify that the database is accessible. It does *not* verify that the supplied credentials grant write permission to the table.

The *Enable Activity Logging* checkbox will be enabled when a connection string exists. Event logging may be switched on and off using this checkbox.

Clicking the *Logged Activities* tab will show a list of actions that may be logged.



Individual events may be enabled or disabled by clicking the related checkbox in the *Log* column. All events may be toggled by clicking on the *Log* column header.

Highlighting the event will show the *Logged Information* details in the right frame.

Click **OK** to record the settings and close the dialog box.

Notes:
Although not a requirement for logging, the schema of the logging table may be ported into an Ad Hoc instance. The System Administrator can produce reports on the logging data for auditing and monitoring purposes, but restrict general access to the data object.

After enabling logging, there is no visible indication within the Ad Hoc user interface that logging is active.

The following table shows the information that's logged for each log action available:

	Logged Information														
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User-name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Login	✓	✓	✓	✓	✓	✓									
Logout	✓	✓	✓	✓	✓	✓								✓	
Create Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓			
Modify Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓			
Delete Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Rename Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Copy Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Move Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Schedule Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				

	Logged Information														
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User-name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Unschedule Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Subscribe to Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Unsubscribe from Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Batch Subscribe to Report	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
Batch Unsubscribe from Report	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
Run Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓		
Create User	✓	✓	✓	✓	✓	✓									✓
Modify User	✓	✓	✓	✓	✓	✓									✓
Remove User	✓	✓	✓	✓	✓	✓									✓
Create Role	✓	✓	✓	✓	✓	✓									✓
Modify Role	✓	✓	✓	✓	✓	✓									✓
Remove Role	✓	✓	✓	✓	✓	✓									✓
Create User Group	✓	✓	✓	✓	✓	✓									✓
Modify User Group	✓	✓	✓	✓	✓	✓									✓
Remove User Group	✓	✓	✓	✓	✓	✓									✓

	Logged Information														
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User-name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Create Relationship	✓	✓	✓	✓	✓	✓		✓							✓
Modify Relationship	✓	✓	✓	✓	✓	✓		✓							✓
Remove Relationship	✓	✓	✓	✓	✓	✓		✓							✓
Create Permission	✓	✓	✓	✓	✓	✓									✓
Modify Permission	✓	✓	✓	✓	✓	✓									✓
Remove Permission	✓	✓	✓	✓	✓	✓									✓
Create User-Defined Column	✓	✓	✓	✓	✓	✓		✓							✓
Modify User-Defined Column	✓	✓	✓	✓	✓	✓		✓							✓
Remove User-Defined Column	✓	✓	✓	✓	✓	✓		✓							✓
Create Virtual View	✓	✓	✓	✓	✓	✓		✓							✓
Modify Virtual View	✓	✓	✓	✓	✓	✓		✓							✓
Remove Virtual View	✓	✓	✓	✓	✓	✓		✓							✓
Create Cascading Filter	✓	✓	✓	✓	✓	✓		✓							✓
Modify Cascading Filter	✓	✓	✓	✓	✓	✓		✓							✓
Remove Cascading Filter	✓	✓	✓	✓	✓	✓		✓							✓

	Logged Information														
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User-name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Create/Modify Session Parameter	✓	✓	✓	✓	✓	✓									✓
Remove Session Parameter	✓	✓	✓	✓	✓	✓									✓
Create/Modify Presentation Style	✓	✓	✓	✓	✓	✓									✓
Remove Presentation Style	✓	✓	✓	✓	✓	✓									✓
Modify Session Parameters for User Group	✓	✓	✓	✓	✓	✓		✓							✓
Modify Report Settings	✓	✓	✓	✓	✓	✓		✓							✓
Modify Application Settings	✓	✓	✓	✓	✓	✓									✓
Create/Modify Data Format	✓	✓	✓	✓	✓	✓									✓
Remove Data Format	✓	✓	✓	✓	✓	✓									✓

Configure Reporting Databases

Every Ad Hoc instance must have at least one reporting database connected to it and some portion of the schema of the database available for reporting. Regardless of the technique used to establish reporting database information in the metadata database, the goal is to configure it so that the end user can create robust, accurate reports on the data.

Every reporting database *must* have:

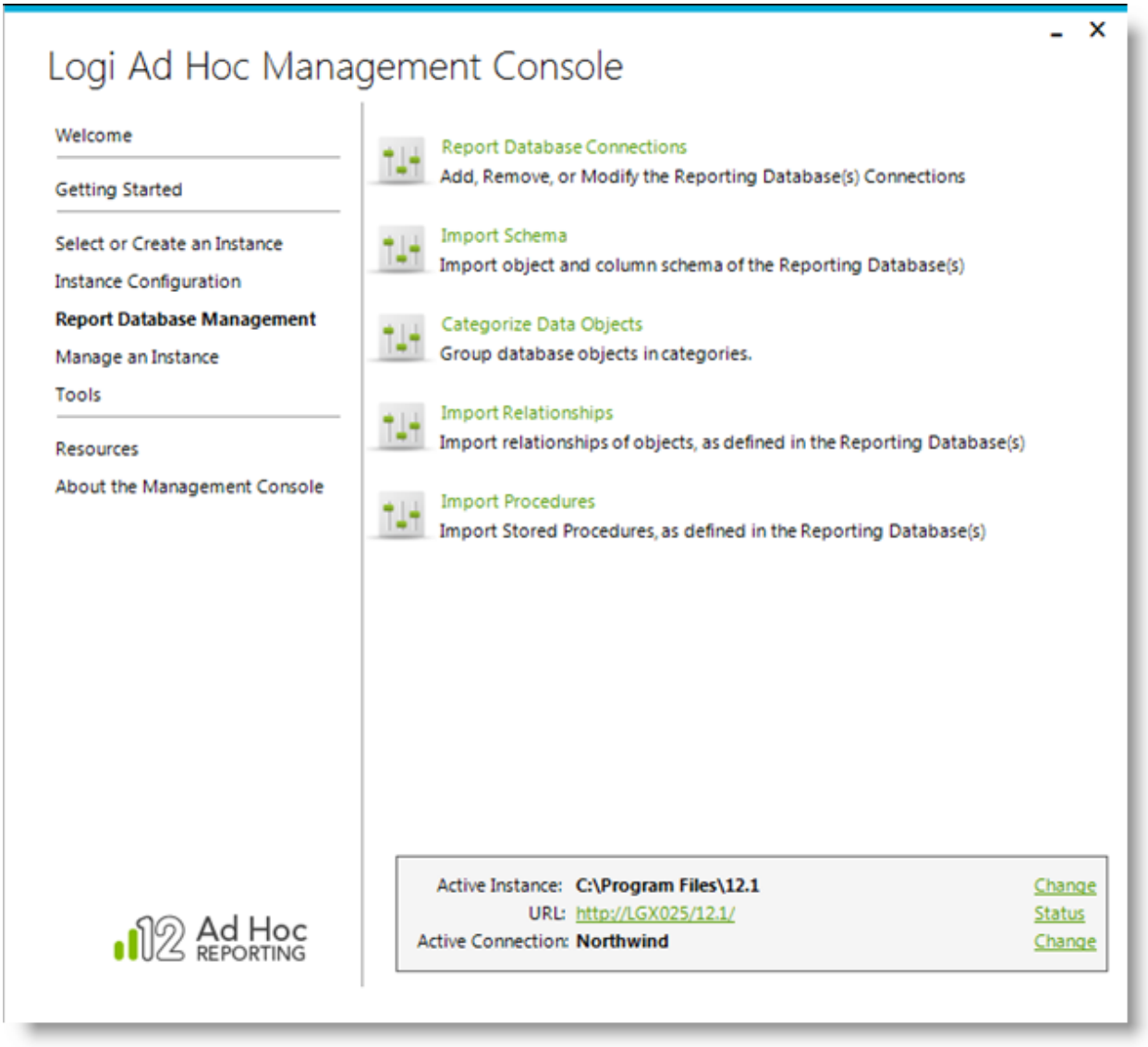
- A unique database name.
- A connection string that identifies the database, provider, and access credentials.
- All or some of the schema imported into the Ad Hoc metadata database.
- User-friendly names for the objects and columns.

Every reporting database *should* have:

- Relationships between objects defined.
- Objects organized into categories, particularly when there are a large number of objects available to end users.

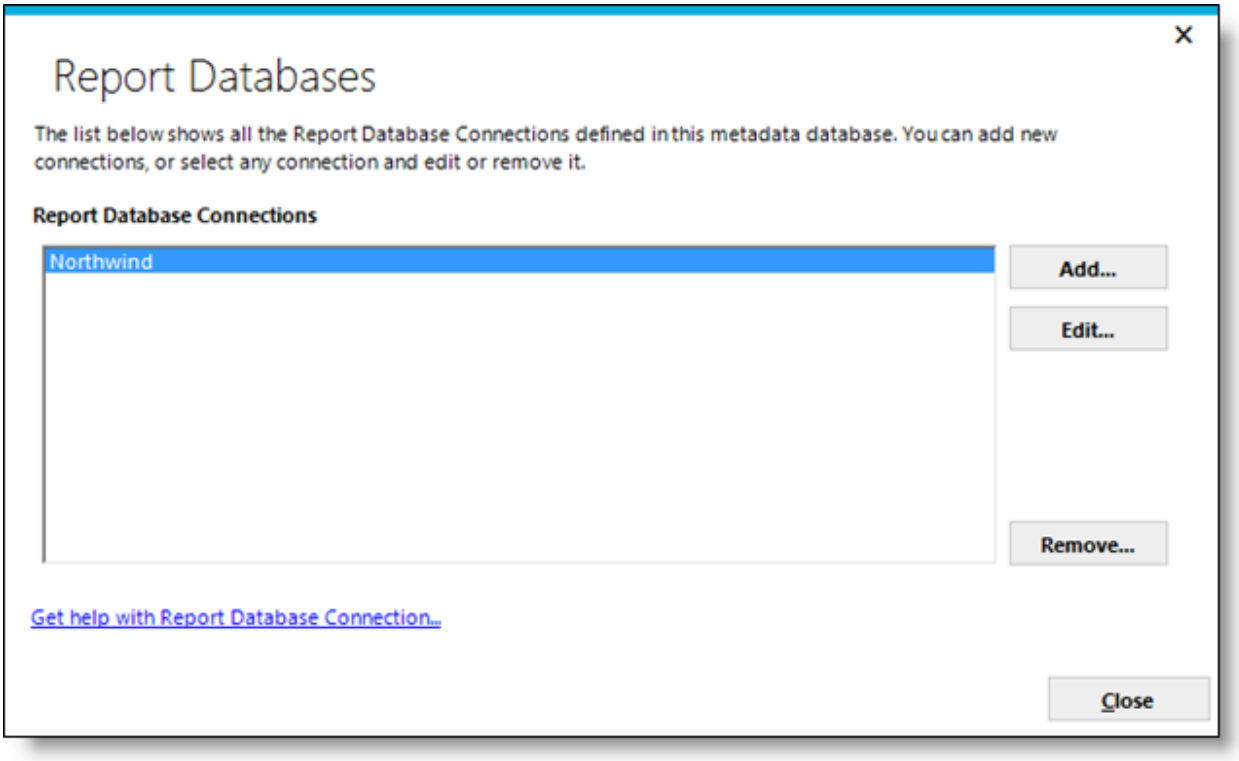
The **Report Database Management** action group contains all of the actions to properly establish and configure a reporting database. The **Configuration Wizard** may also be used to accomplish the same goal.

Clicking the **Report Database Management** action group displays:



Report Database Connections

To create and manage connections to reporting databases for an instance, click Report Database Connections. A dialog box with a list of existing reporting database connections will be displayed:

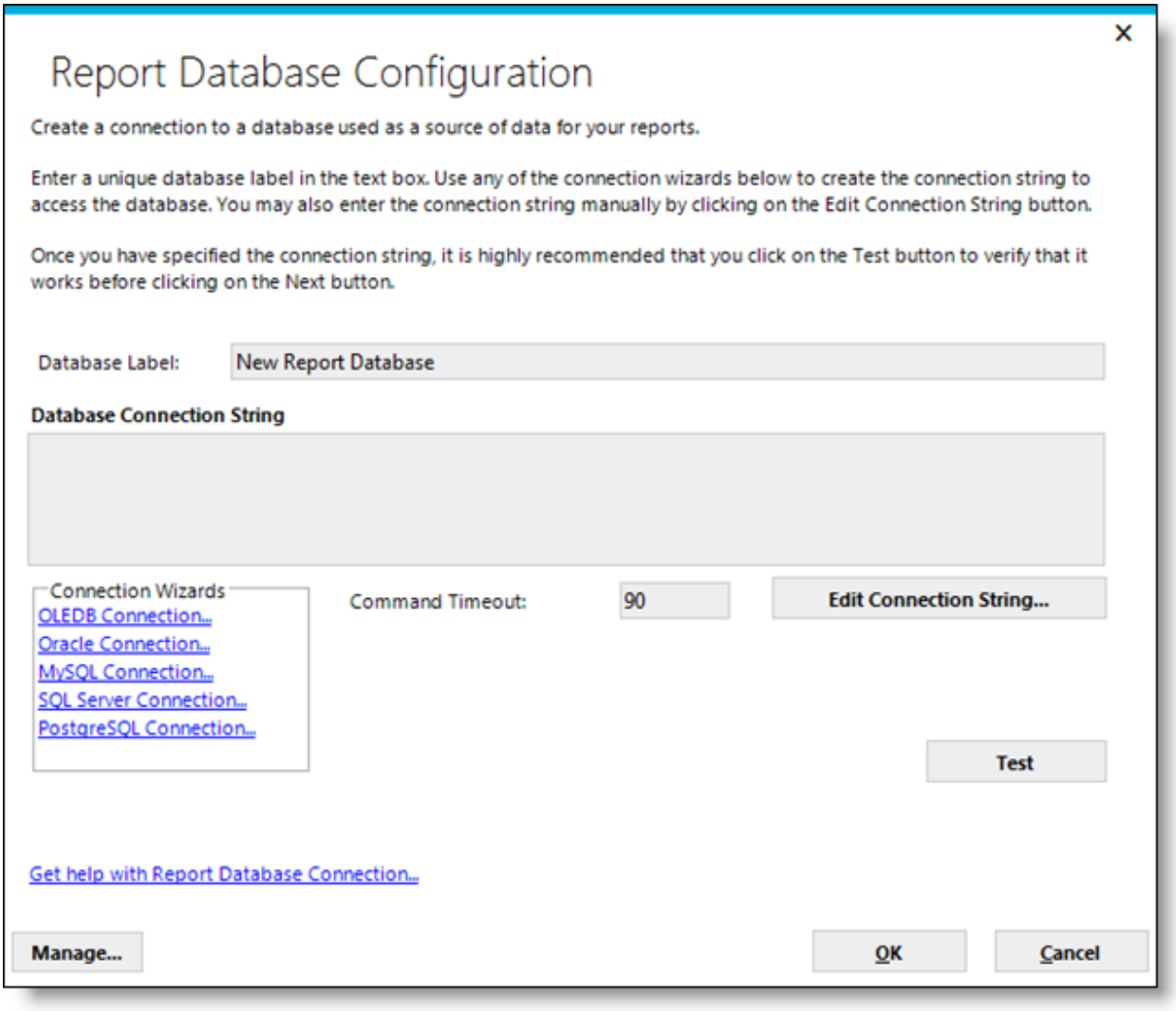


To create a new connection to a reporting database, click **Add**.

To modify existing connection information, highlight the connection in the list and click **Edit**.

To remove a reporting database connection, highlight the connection in the list and click **Remove**.

Clicking either **Add** or **Edit** will display the **Report Database Configuration** dialog box:



With this dialog box and the related, subordinate dialog boxes, the goal is to provide a "friendly name" for the reporting database and build the connection string to access the database.

The *Database Label* is the name displayed in a *Database* drop-down list in the Ad Hoc interface when more than one database is available to the user for reporting.

The *Database Connection String* area displays the associated connection string for the reporting database.

The *Connection Wizards* frame presents links to various providers. The **Oracle, MySQL, and PostgreSQL** links are to the native client providers for the respective DBMS.

Java -
The suite of connection links will be limited to Oracle, MySQL, and PostgreSQL.

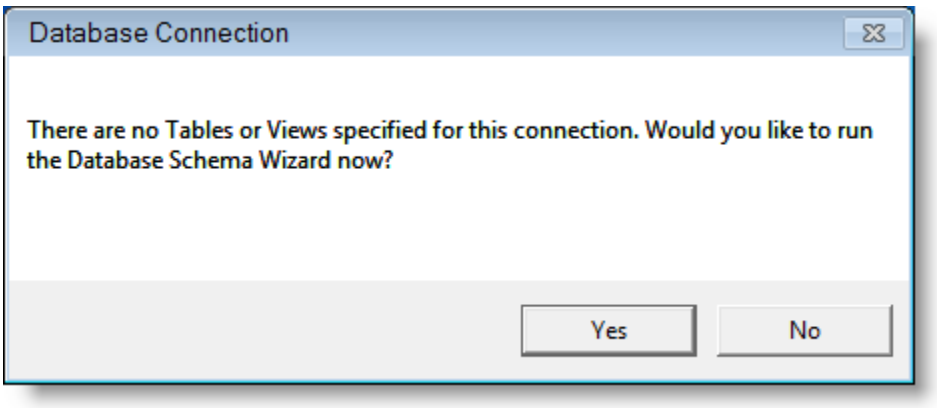
Command Timeout refers to the timeout period (seconds) for any request made to the reporting database.

In addition to the *Connection Wizard* links, the connection string may be created and modified manually by clicking **Edit Connection String**.

Note:
For Oracle connections, a **Use ANSI** checkbox will be displayed. This checkbox determines the syntax generated to specify table relationships. If checked, the syntax generated will be the newer ANSI standard (e.g. Left Outer Join, Right Outer Join, Inner Join). If disabled, the older table+ = table syntax will be generated. As a general rule, for Oracle 9i use the default, unchecked option. For later editions of Oracle, the option should be checked.

Whenever a connection string is created or modified, it's good practice to click **Test** to verify that the information provides access to the database.

Click **OK** to save the information. If there's no schema information in the metadata database related to the reporting database, the following dialog box will offer the opportunity to run the Import Schema wizard:

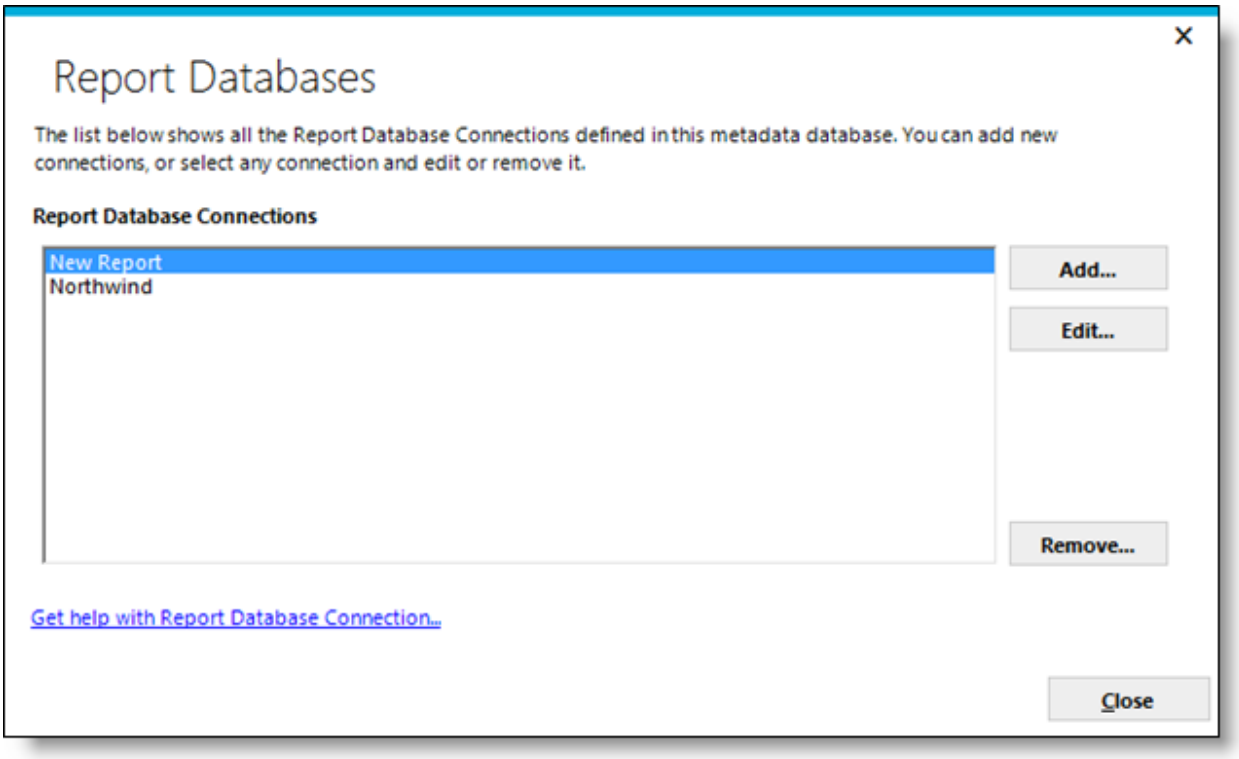


Clicking **Yes** will launch the Import Schema wizard. Clicking **No** will return you to the Report Databases dialog box and the list of existing connection strings.

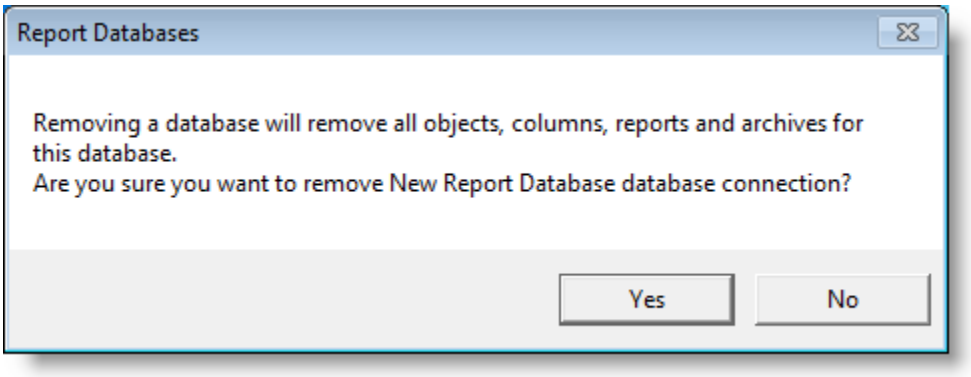
The **Report Databases** dialog box can be closed by clicking **Close**.

Removing a Reporting Database Connection

As an example, the following Report Databases dialog box shows two reporting databases connected to the instance.



By highlighting the “New Report” connection and clicking **Remove**, the following confirmation dialog box will be displayed:



Click **Yes** to remove the reporting database connection and the related metadata, reports, and archives.

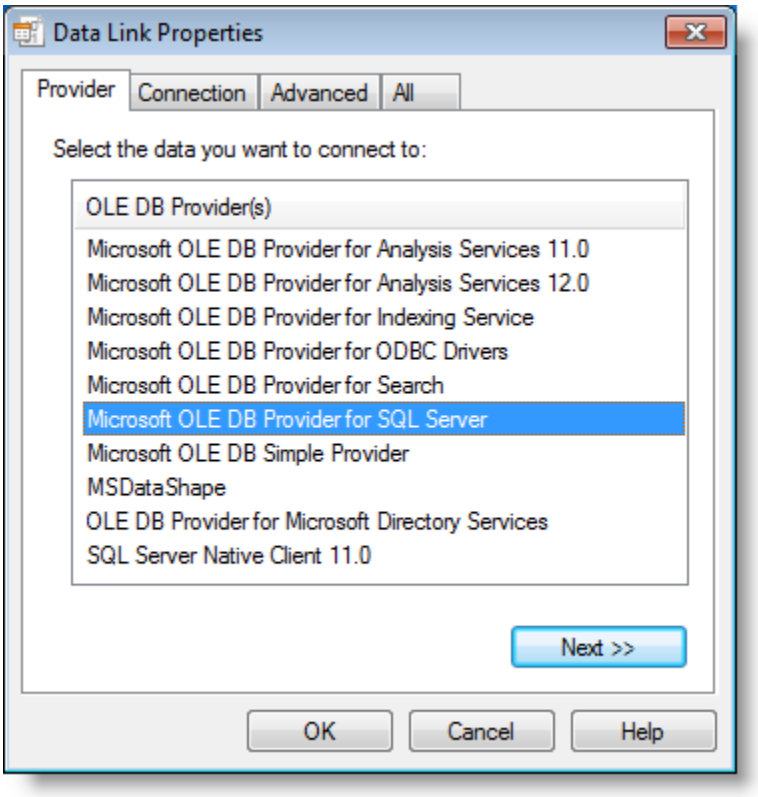
Click **No** to cancel the **Remove** operation and return to the Report Databases dialog box.

Connection Wizards

The combinations of databases and providers are extensive. The System Administrator will be required to select a data provider, identify the database and provide credentials to access the database. Following are the typical dialog boxes and brief descriptions of their expected usage.

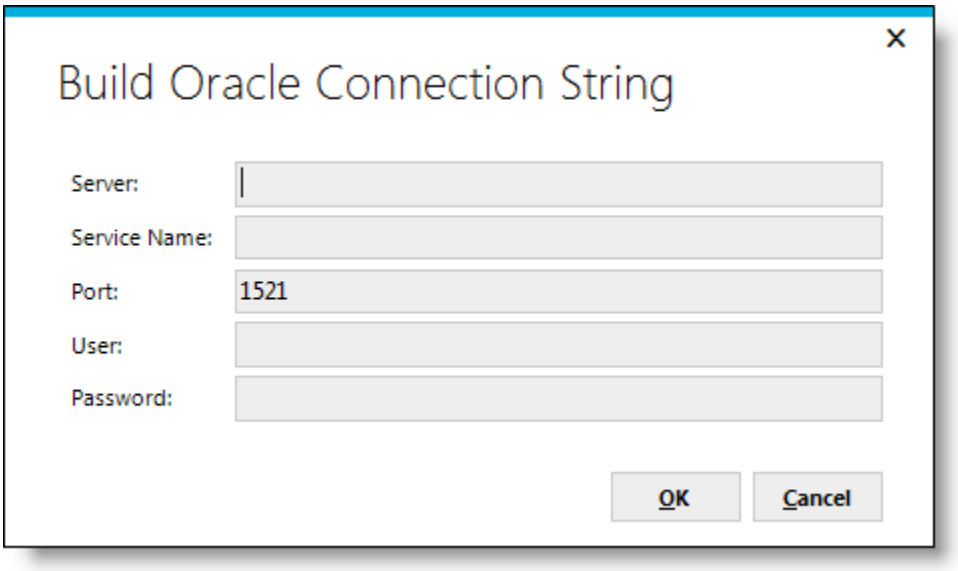
OLEDB Connection

The Windows **Data Link Properties** dialog box is displayed. Click **Provider** tab and select a data provider. Click **Next** or the *Connection* tab and complete the connection information. Click **OK** to build the connection string and return to the **Report Database Configuration** dialog box.



Oracle Connection

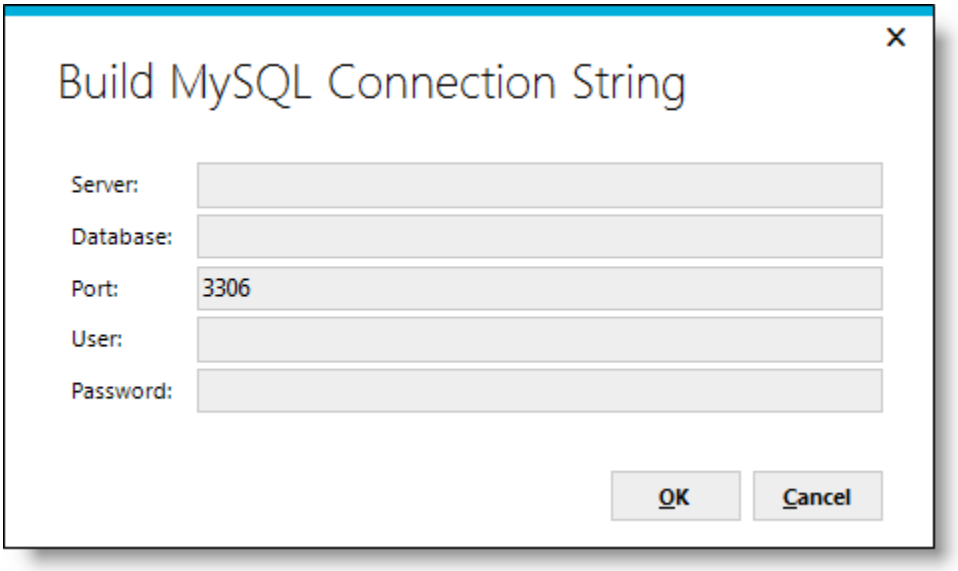
The **Build Oracle Connection String** dialog box is displayed. Enter the *Server*, *Service Name*, *Port* (defaulted to 1521), *User* and *Password* information.



Click **OK** to build the connection string and return to the **Report Database Configuration** dialog box.

MySQL Connection

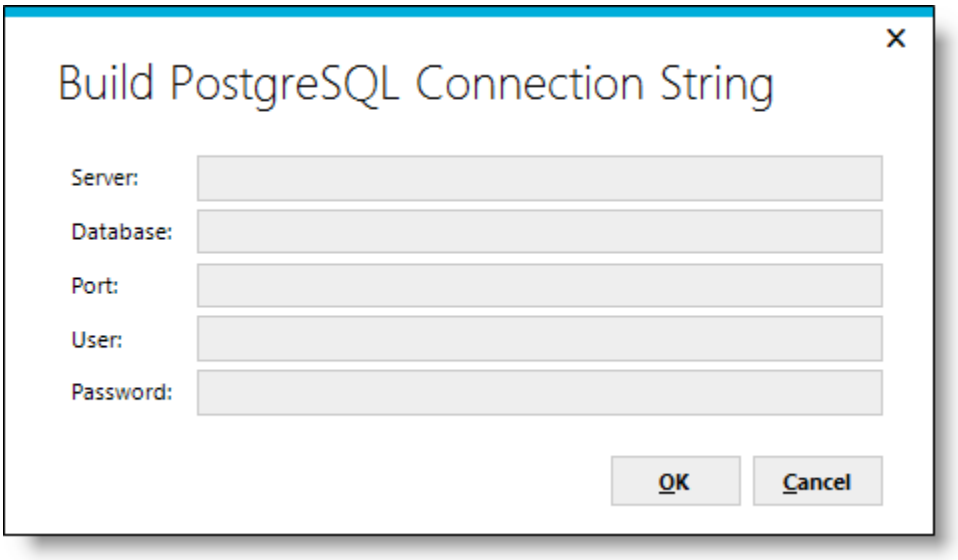
The **Build MySQL Connection String** dialog box is displayed. Enter the *Server, Database, Port* (defaulted to 3306), *User* and *Password* information.



Click **OK** to build the connection string and return to the **Report Database Configuration** dialog box.

PostgreSQL Connection

The **Build PostgreSQL Connection String** dialog box is displayed. Enter the *Server, Database, Port*, *User* and *Password* information.



Click **OK** to build the connection string and return to the **Report Database Configuration** dialog box.

Database Schema Wizard

The Database Schema Wizard allows the System Administrator to populate the metadata database for the Ad Hoc instance with schema information from the active reporting database. Initially, the wizard would be used to import all or part of the reporting database schema.

The wizard would also be used to keep the related metadata information accurate as changes are made in the reporting database schema. Objects and columns may be added, removed and customized using the wizard.

The wizard also forces the System Administrator to provide user-friendly names for the objects and columns. These may be set using certain rule sets or they may be entered manually.

Three main dialog boxes will be displayed by the Database Schema Wizard:

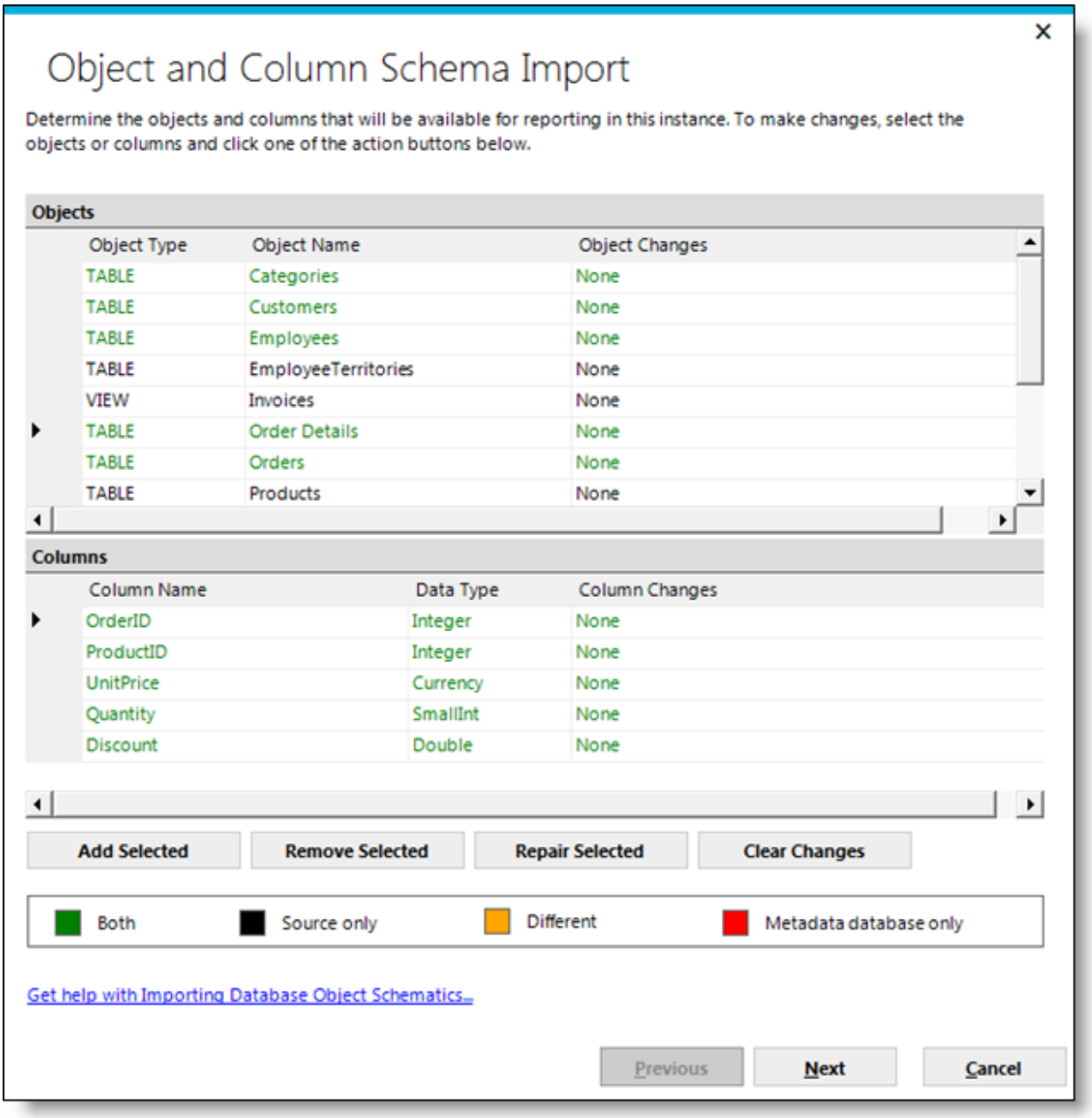
- Import/Manage Objects and Columns
- User-friendly Object Names and Descriptions
- User-friendly Column Names and Descriptions

Note:
If the following message is displayed:

Click the **Change** link related to the *Active Connection* in the target pane, or click **Report Database Management/Report Database Connections**, then highlight a reporting database and click **Close**.

Import/Manage Objects and Columns

The **Object and Column Schema Import** dialog box allows the System Administrator to select objects and columns from the reporting database to be added to, removed from or repaired in the metadata database.



The action buttons, **Add Selected**, **Remove Selected,** and **Repair Selected,** will set the *Object Changes* or *Column Changes* column for the highlighted information in the *Objects* and *Columns* grids.

Selecting (highlighting) rows in the grid can be done by:

- Clicking a row in the grid.
- [CTRL]-clicking one or more rows.
- [Shift][CTRL]-clicking blocks of rows.
- Holding the mouse button down and dragging it over the rows.
- Clicking on the block in the upper-left corner of the grid to select all rows.

Information in the grids may be sorted and re-sorted by clicking on the column header.

The grid information is color coded based on a comparison of the reporting database schema and the metadata database information.

Green means that the information in the databases matches. This implies that the objects and columns have been imported into the metadata already and there have been no changes.

Black means that the object or column only exists in the reporting database. This implies that the objects and columns definitions have *not* been imported into the metadata database.

Orange means that the objects or columns exist in both databases, but the schema information doesn't match. This implies that the data types, field lengths, or other characteristics are different than the information recorded in the metadata database.

Red means that the metadata has object or column references that are no longer in the reporting database. This implies that either the objects or columns have been removed from the reporting database or the names have been changed.

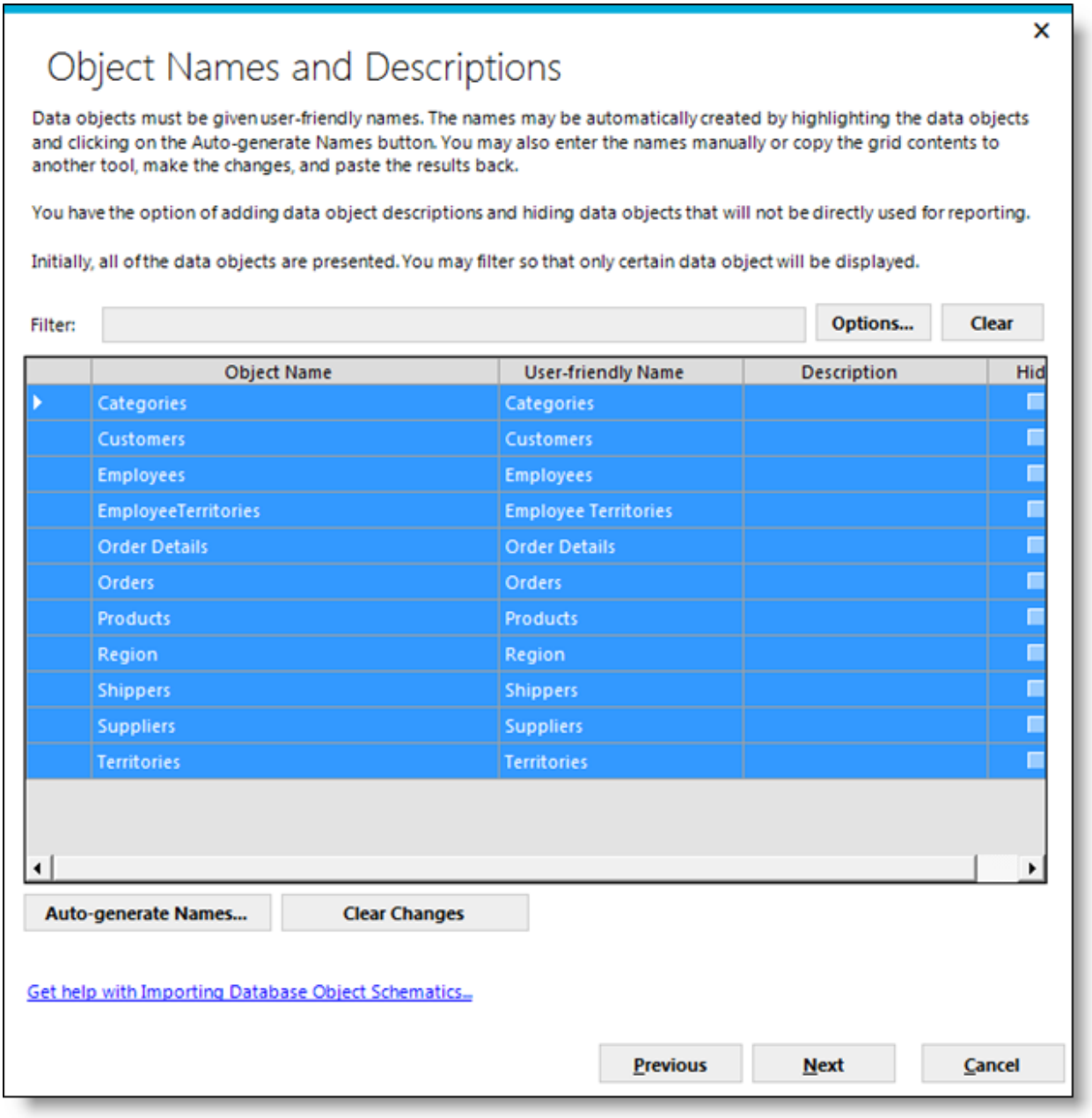
The most common usage of the **Database Schema** wizard is to import all or part of a reporting database schema into the metadata. On this dialog box, the typical steps would be:

1) Click box in the upper left corner of the *Objects* grid to highlight all of the objects.
2) Click **Add Selected** to set the actions to be performed on the objects and columns.

3) Click **Next** to continue to the next dialog box where the object names and descriptions will be set.

Set User-friendly Object Names and Descriptions

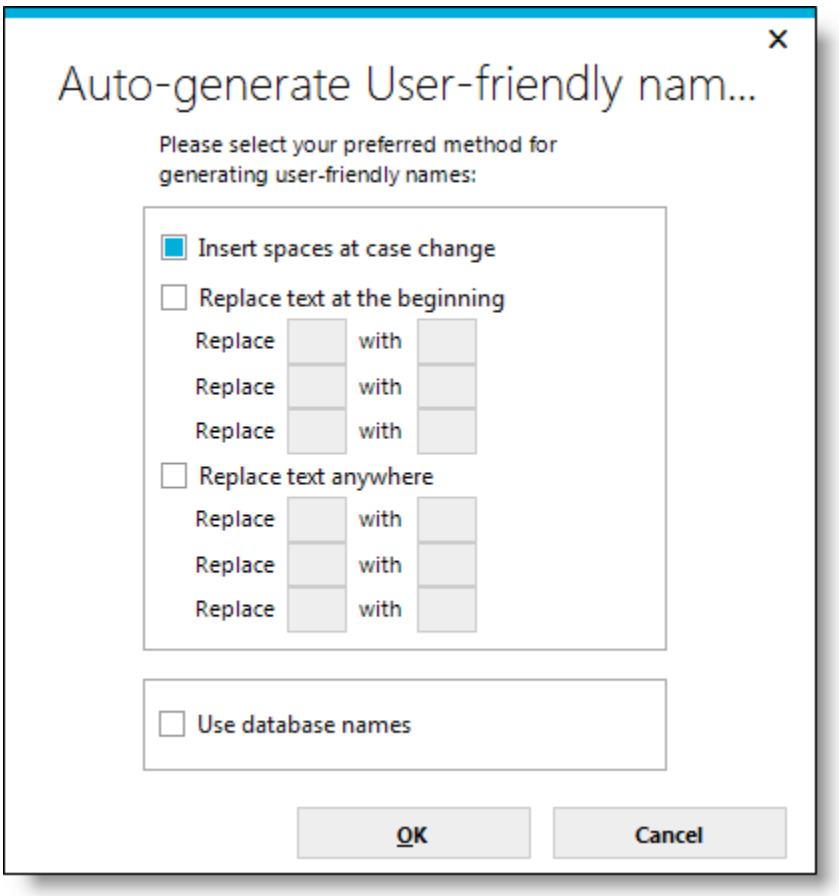
The **Object Names and Descriptions** dialog box is displayed. Creation of *User-friendly Names* is required as part of the configuration process. Specifying object *Descriptions* is optional.



User-friendly Names and *Descriptions* can be manually added by entering information in the appropriate column in the grid. Every object must have a *User-friendly Name*. Objects may also be hidden from end-users by checking the related *Hide* checkboxes.

The dialog box also provides a mechanism to generate the *User-friendly Name* for the highlighted objects. Click the upper-left corner of the grid to highlight all of the objects. Click **Auto-generate Names** to let the MC set the names automatically.

The **Auto-generate User-friendly names** dialog box will be displayed. The two most frequently used options are "*Insert spaces at case change*" and "*Use database names*".



Check the checkbox for an option, provide any additional information necessary, and click **OK**.

After reviewing the generated friendly object names and entering *Descriptions* as necessary, click **Next** to set the names and descriptions of the columns.

The most common usage of the **Object Names and Descriptions** dialog box is as follows:

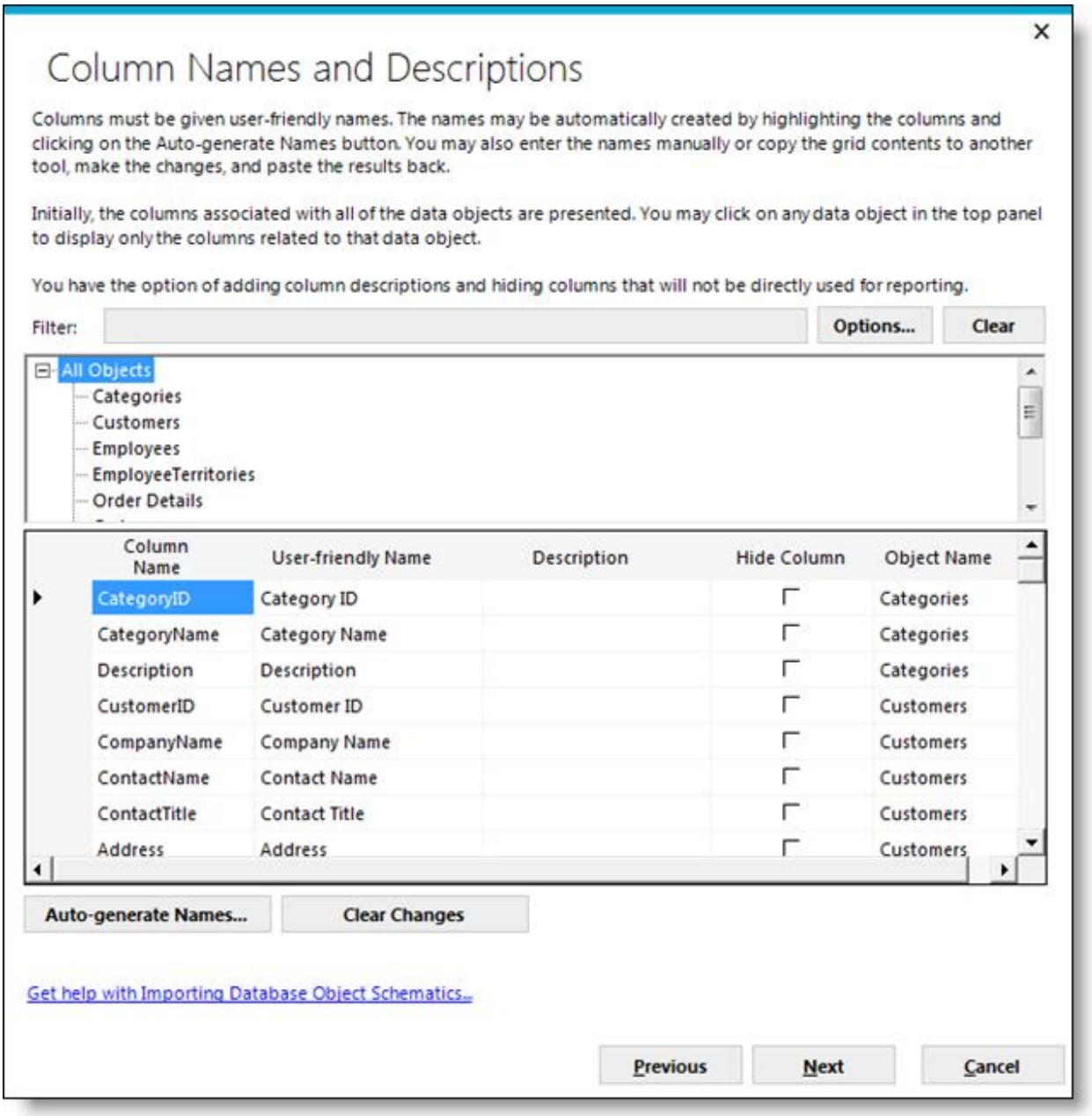
1) Click box in the upper left corner of the grid to select all objects.
2) Click **Auto-generate Names** to show the automated naming options.
3) Click **OK** and then **Next.**

Note:
The dialog box also provides a simple filter that may assist in locating objects in larger schemas. Enter search criteria into the *Filter* text box and the list will be adjusted based on the filter criteria.

Click **Options** to set the filter criteria.
Click **Clear** to reset the Filter text box and show all objects in the grid.

User-friendly Column Names and Descriptions

The **Column Names and Descriptions** dialog box is displayed. Creation of *User-friendly Names* is required as part of the configuration process. Specifying column *Descriptions* is optional.

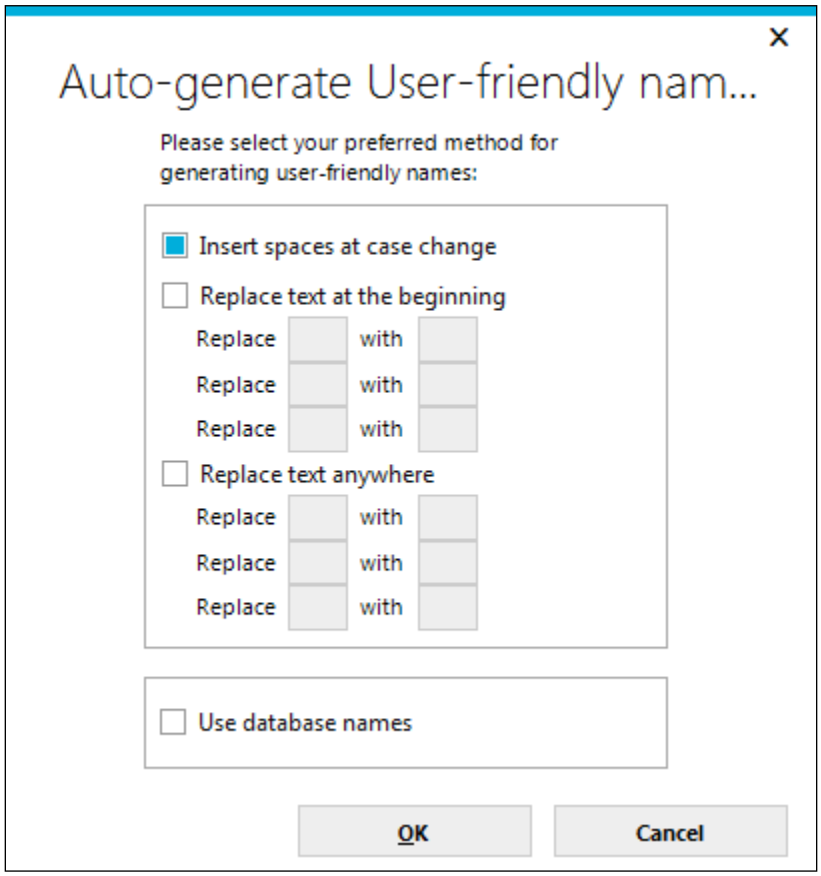


User-friendly Names and *Descriptions* can be manually added by entering information directly into the appropriate column in the grid. Every column must have a *User-friendly Name*. Columns may also be hidden from end-users by checking the related *Hide* checkboxes.

For manual entry of *User-friendly Names* for the columns, clicking on the object name in the top panel will show only the related columns in the bottom panel. For the complete list of columns in the bottom panel click **All Objects** in the top panel.

The dialog box provides a mechanism to generate the *User-friendly Names* for the highlighted columns. Click the box in the upper-left corner of the grid in the bottom panel to highlight all of the columns displayed in the panel. Click **Auto-generate Names** to let the MC set the names automatically.

The **Auto-generate User-friendly names** dialog box will be displayed. The two most frequently used options are "*Insert spaces at case change*" and "*Use database names*".



Check the checkbox for an option, provide any additional information necessary, and click **OK**.

After reviewing the generated friendly object names, entering *Descriptions* as necessary, click **Next** to set the names and descriptions of the columns.

The most common usage of the **Column Names and Descriptions** dialog box is as follows:

1) Click on All Objects to populate the lower panel with all columns.
2) Click box in the upper left corner of the grid in the bottom panel to highlight all of the columns.
3) Click **Auto-generate Names** to show the automated naming options.
4) Click **OK** and then **Next.**

Note:
The dialog box also provides a simple filter that may assist in locating columns in larger schemas. Enter search criteria into the *Filter* text box and the list will be adjusted based on the filter criteria.

Click **Options** to set the filter criteria.
Click **Clear** to reset the Filter text box and show all columns in the grid related to the highlighted object.

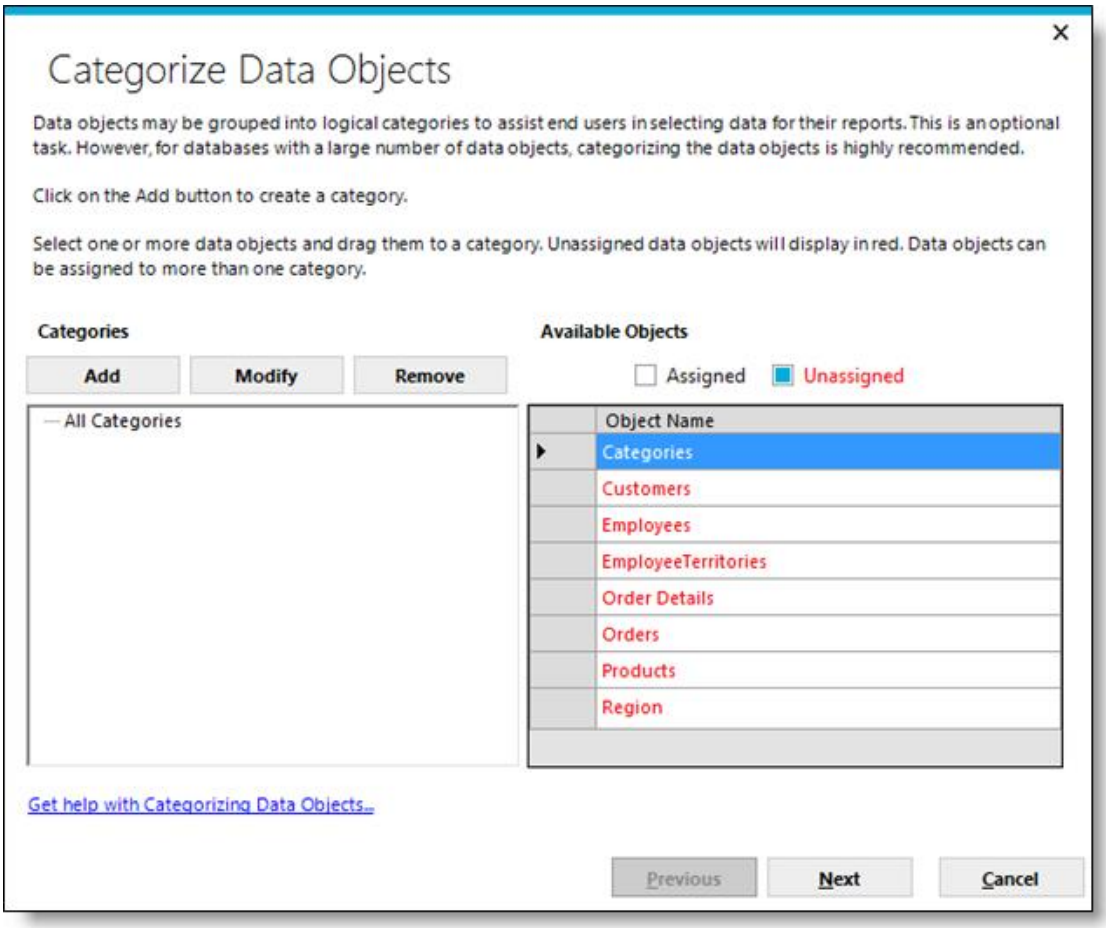
Categorizing Data Objects

Data objects may be grouped into *Categories*. Although grouping objects into categories is not generally required, it's highly recommended for installations with large a number of data objects. It can be beneficial to present categories of data objects to the end user rather than a long list of possibly unrelated data objects.

The **Categorize Data Objects** dialog box may be launched by:

- Using the **Configuration Wizard** as part of creating a new instance by default or through the **Advanced Options** configuration.
- Clicking the **Report Database Management** action group and then clicking **Categorize Data Objects.**

The following dialog box will be displayed:



Note:
For schemas with over 50 objects, categories may be *required* by the Management Console.

The **Categorize Data Objects** dialog box presents a category management panel on the left side and the list of objects in the metadata database on the right side.

Three action buttons are displayed to manage the categories.

- **Add** will present a dialog box to enter the category name and description. Click OK to save the category information.
- **Modify** allows the highlighted category name and description to be changed.
- **Remove** will remove the highlighted item in the categories list. If the highlighted item is an object, the object will be removed from the category. If the highlighted item is a category name, the category will be removed and assigned data objects will be unassigned.

The **Assigned** and **Unassigned** checkboxes serve as quick filters for the *Object Name* list.

The most common usage of the **Categorizing Objects** dialog box is as follows:

1) Create the category names by clicking **Add** and completing the add dialog box.
2) Drag the data objects from the *Object Name* list to the category. Data objects may appear in more than one category.
3) Click **Next** to save the information.

Note:
Grouping objects into categories does not imply that any join relationships are created. Categories only represent a logical collection of data objects and serve as a quick filter of the list of data objects for the end user.

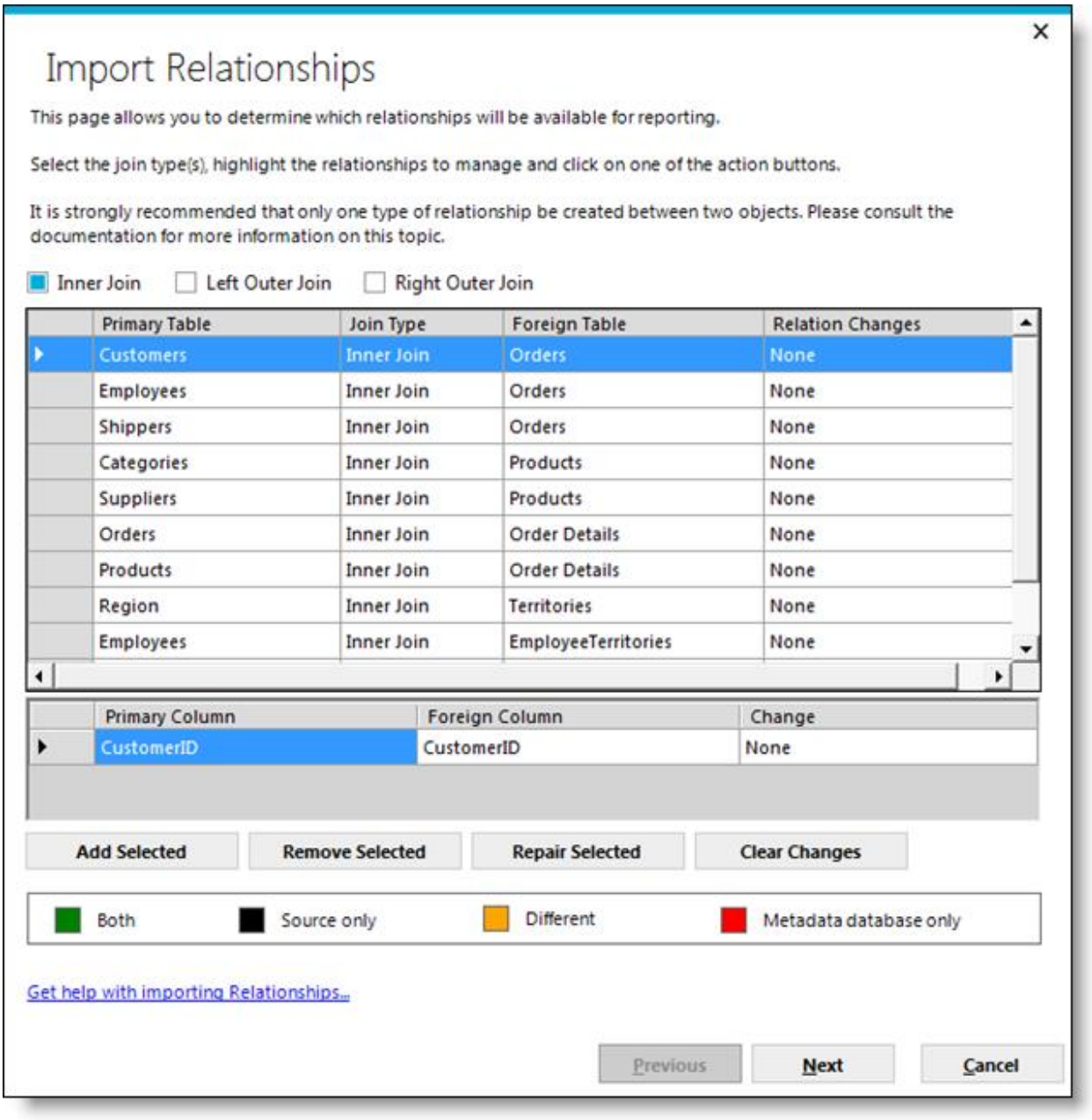
Importing Relationships

The schema of a reporting database may include join relationships between tables and views. The **Import Relationships** dialog box allows the System Administrator to port those relationships into the metadata database automatically. A *User-friendly Name* is also required for every relationship.

The **Import Relationships** dialog box may be launched:

- Through the **Configuration Wizard** as part of creating a new instance by default or through the **Advanced Options** configuration.
- By clicking the **Report Database Management** action group and then clicking **Import Relationships**.

The following dialog box will be displayed:



At the top of the dialog box are three filters, **Left Outer Join**, **Inner Join**, and **Right Outer Join** that serve to filter the contents of the grid below.

The list of data object relationships is displayed in the top grid. The grid rows may be sorted by clicking on any column header.

The bottom grid presents the joined columns in the highlighted data object relationship. If multiple data objects are highlighted, the bottom grid will display the relationship columns for the first relationship selected.

Three action buttons are displayed in the dialog box:

- **Add Selected** indicates that the highlighted relationships should be added to the metadata database.
- **Remove Selected** indicates the highlighted relationships should be removed from the metadata database
- **Repair Selected** indicates that the highlighted relationship should be modified so that the metadata database reflects any revisions in the reporting database schema.

The grid information is color coded based on a comparison of the reporting database schema and the metadata database information.

Green means that the information in the databases matches. This implies that the relationships have been imported into the metadata and there have been no changes.

Black means that the relationships only exist in the reporting database. This implies that the relationship definitions have not been imported into the metadata database.

Orange means that the relationships exist in both databases, but the schema information doesn't match. This implies that the relationship definition may have changed since the relationship was ported into the metadata.

Red means that the metadata has relationships defined that are either no longer in the reporting database schema or were manually created via the Ad Hoc interface.

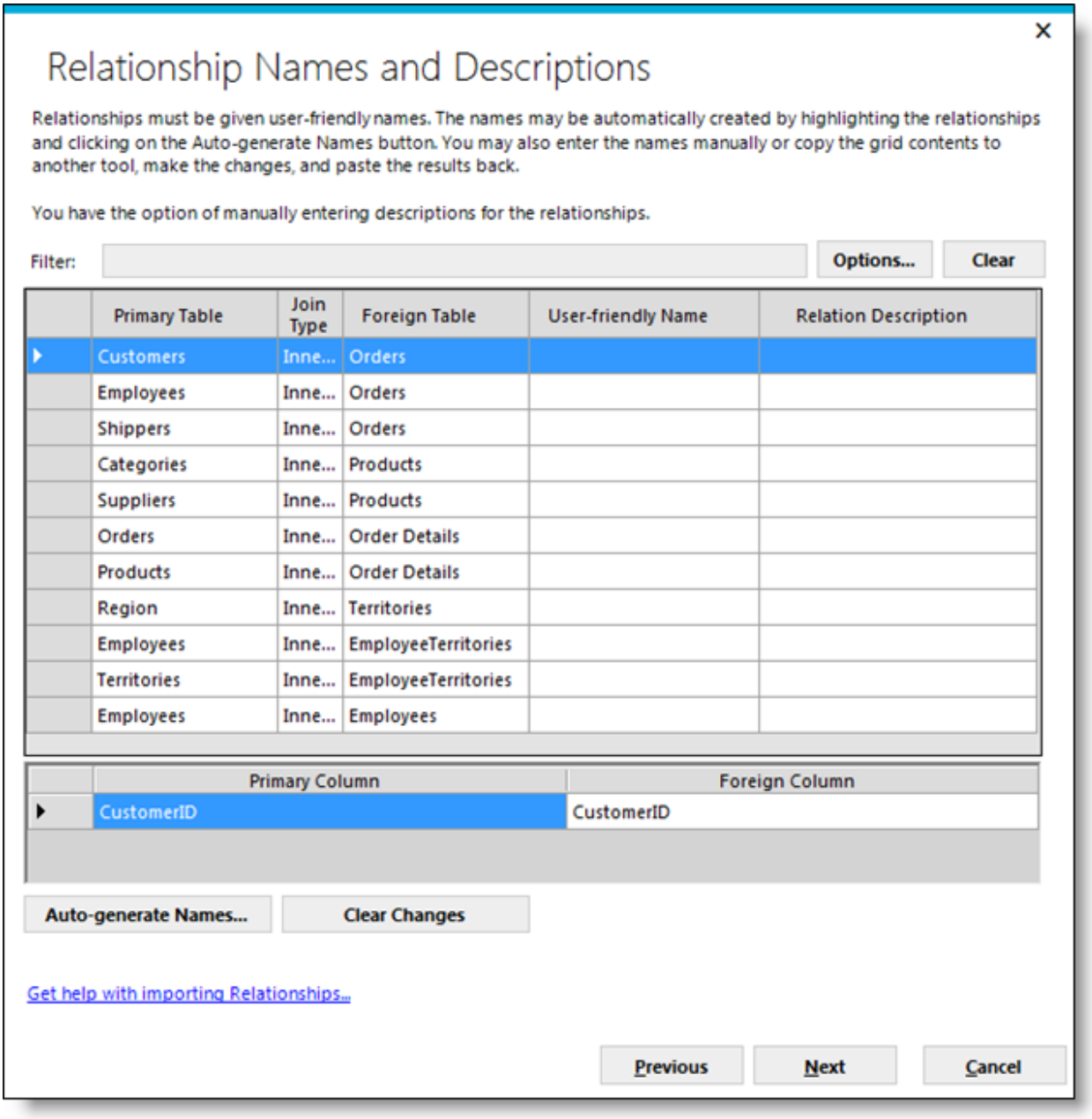
After highlighting the relationships and selecting an action, click **Next** to display the **Relationship Names and Descriptions** dialog box.

The most common usage of the **Relationships Import** dialog box is:

1) Click required filter checkboxes. Most System Administrators select the **Inner Join** and **Reverse Relations** filters.
2) Click upper left corner box of the relationships grid to highlight all of the relationships.

3) Click **Add Selected** to set the action.

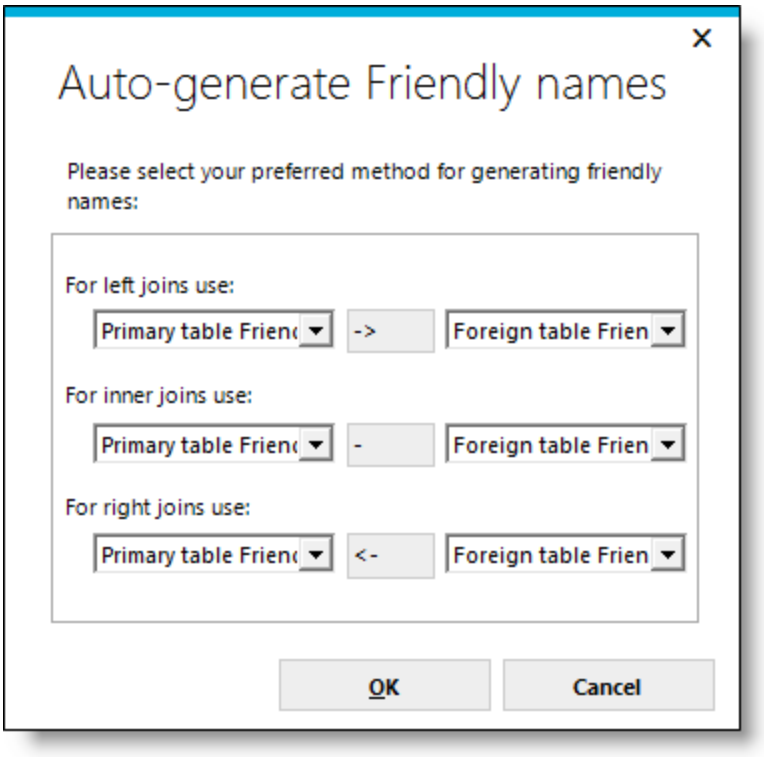
4) Click **Next** to display the **Relationship Names and Descriptions** dialog box:



Relationships are required to have a *User-friendly Name* and may optionally have a *Description*.

The *User-friendly Names* and *Descriptions* may be entered manually directly into the grid. An option to automatically generate the *User-friendly Names* according to specific rules is displayed by highlighting rows in the grid and clicking **Auto-generate Names**.

The following dialog box is displayed:



The options in the drop-down lists are:

- *Primary table Friendly Name*, the default for the main data object.
- *Primary table name*, the name as is appears in the reporting database.
- *Foreign table Friendly Name*, the default for the joined data object.
- *Foreign table name*, the name as it appears in the reporting database.

The most common usage of the **Relationship Names and Descriptions** dialog box is:

1) Highlight all relationships by clicking on the upper-left corner of the grid.

2) Click **Auto-generate Names.**

3) Click **OK.**

Click **Next** to make the relationship changes to the metadata database.

Notes:
The ability to import relationships from the reporting database schema is not supported in all reporting databases. Microsoft SQL Server, Oracle, Informix and Sybase are supported.

Sybase foreign key relations will *not* be displayed - only the join relationships for Sybase will be displayed.

The Relationship Wizard is supported for OleDB providers and native providers of Oracle, Informix, and Sybase.

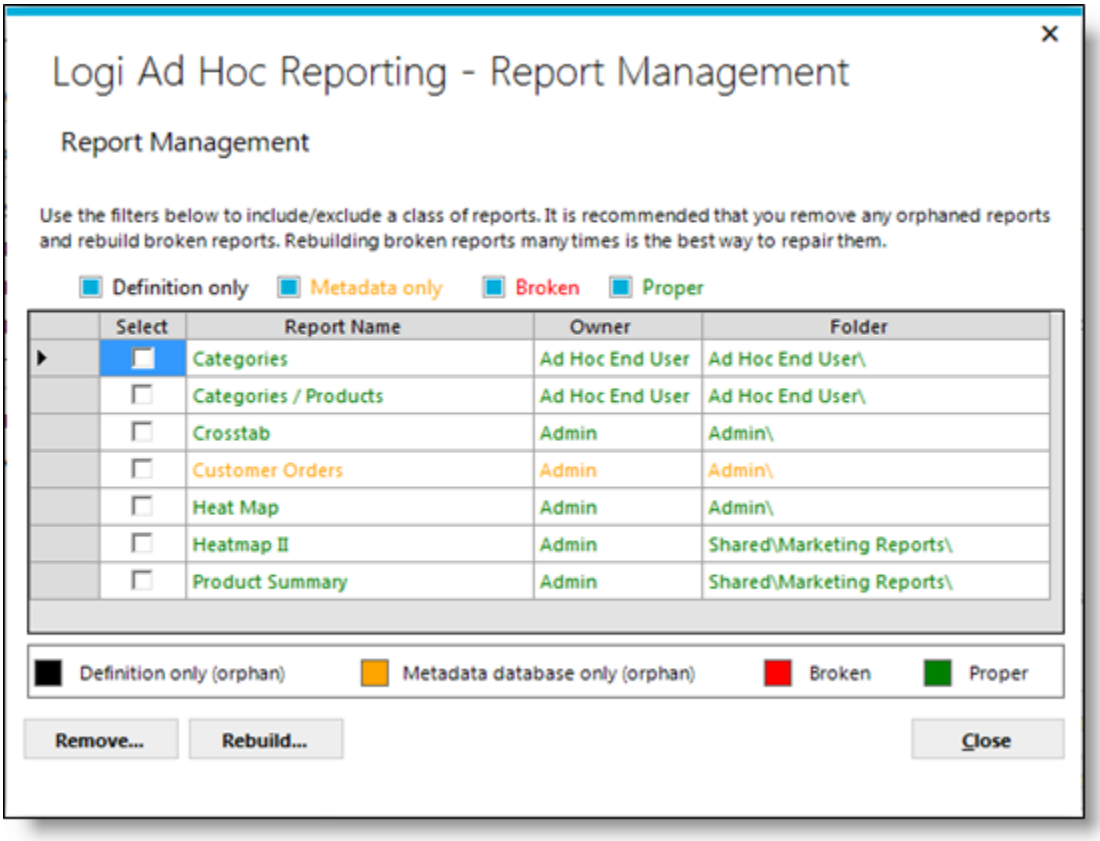
Management Console Tools

Report Management

The **Report Management** utility is designed to allow the System Administrator to fix problems that can crop up in applications that require the synchronization of database records and file system files. The utility also provides a mechanism to rebuild report definitions in a batch mode.

In Ad Hoc, the metadata database maintains information about each report definition. The core information includes a unique identifier, the objects, columns, relationships included in the report, location, and a status. Typically, the XML code defining a report is stored in files in the instance's `_Definitions/_Reports` folder.

The **Report Management** utility examines the information contained in the metadata database and the file system and presents a list of reports with the results of the analysis of each report found.



The information displayed for each report is color-coded. A legend describing the color indication is displayed at the bottom of the dialog box.

Definition only – The utility found a report definition in the report repository, usually the `_Definitions/_Reports` folder, that has no corresponding entry in the metadata database. The only action that makes sense for this type of report is **Remove**.

Metadata database only – The utility found an entry in the metadata for which a corresponding report definition could not be found. The only action that makes sense for this type of report is **Remove**.

Broken – The utility is reporting the status of the report according to data stored in the metadata database. Reports may have been flagged as broken if one or more of the underlying report dependencies have been removed or changed. The **Rebuild** and **Remove** actions might be applied to reports falling into this category.

Proper – The utility found a record of an unbroken report in the metadata and the corresponding report definition in the report repository. The **Rebuild** and **Remove** actions might be applied to reports falling in this category; however, there is no expected action on "Proper" reports.

Using the Utility

The basic steps in using the utility are:

1) Select reports by highlight them.
2) Click either Remove or Rebuild.
3) Review the resulting report.

Remove button – Clicking this button will remove the highlighted reports. For reports that are "orphans", existing only in either the metadata database or the report repository, this is the only action that can be taken.

Rebuild button – Clicking this button is the equivalent of Modify/Save through the Report Builder interface in Ad Hoc. The highlighted reports are rebuilt using the current information in the metadata database.

Close button – Clicking this button will close the Report Management dialog box.

Filtering the Report List

Reports can be filtered based on the analysis performed by the Report Management utility. The report list will display the reports that conform to the checked categories.

For example, a list of “Broken” reports will be displayed by unchecking all of the report categories except “Broken”.

Publishing Managed Reports

"Publishing" reports means to make Logi Info reports available for execution from an Ad Hoc instance. Essentially the process creates a link in the Ad Hoc reports list to the Info report and allows the System Administrator to migrate the necessary report dependencies from the Info application to the Ad Hoc application. Dependencies include the Logi Info report definition file and may include:

- Report, Process and Template definition files
- Image, style sheet, HTML, XML, and Javascript files
- Adobe PDF and Microsoft Excel template files

Newer Logi Info applications will place all of first two types of files into a _SupportFiles folder; older applications may place them in folders such as _Images and _Scripts.

Ad Hoc is based on the Logi Info framework and contains most of its support file folders. If additional support file folders are needed, administrators can manually add the folder to the root directory of the Ad Hoc instance.

Note:

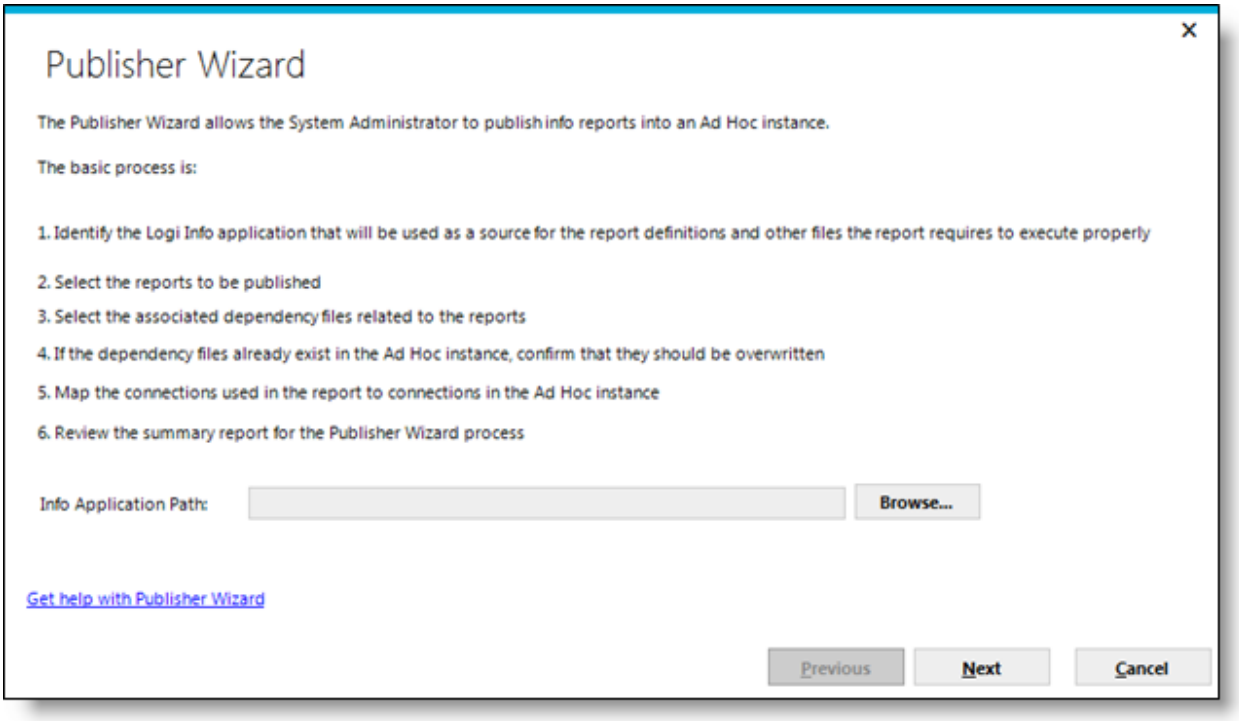
Support file folders always begin with an underscore. Excluding the **_Definitions** folder, all support file folders are optional.

In addition to the dependency files required to have the report rendered properly, reports typically rely on data from a database. Identification of the database and the credentials necessary to access the data are defined in a **Connection** element in the application's `_Settings.lgx` file.

Both Logi Info and Ad Hoc applications rely on Connection elements. One of the key dialog boxes in the Publisher Wizard allows the System Administrator to either map the requisite connections for the repots to their Ad Hoc equivalent, or to copy the existing Logi Info application connection into the Ad Hoc `_Settings.lgx` file.

Running the Publisher Wizard

To launch the **Publisher Wizard**, click the **Tools** action group and then click **Publish Managed Reports**. The following dialog box will be displayed:



Its introductory text outlines the basic publishing process to be performed by the Publisher Wizard.

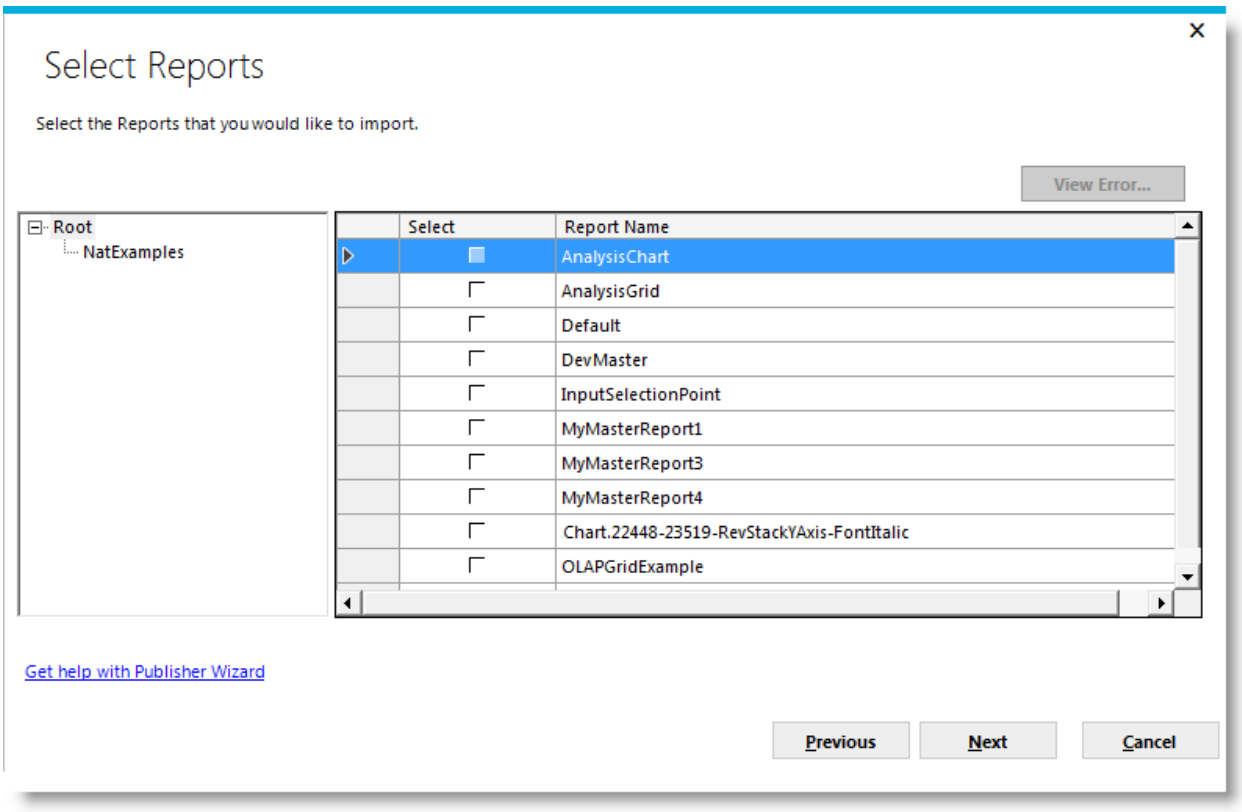
Click **Browse** to identify a Logi Info application.

Click **Next** to display a dialog box that allows the selection of reports from the Info application to be published into the Ad Hoc application.

Note:

If no unpublished Info reports can be found in the instance, an informative message will be issued.

The **Select Reports** dialog box of the **Publisher Wizard** allows the System Administrator to navigate the folder structure of the Info application and identify the reports that should be published into Ad Hoc:

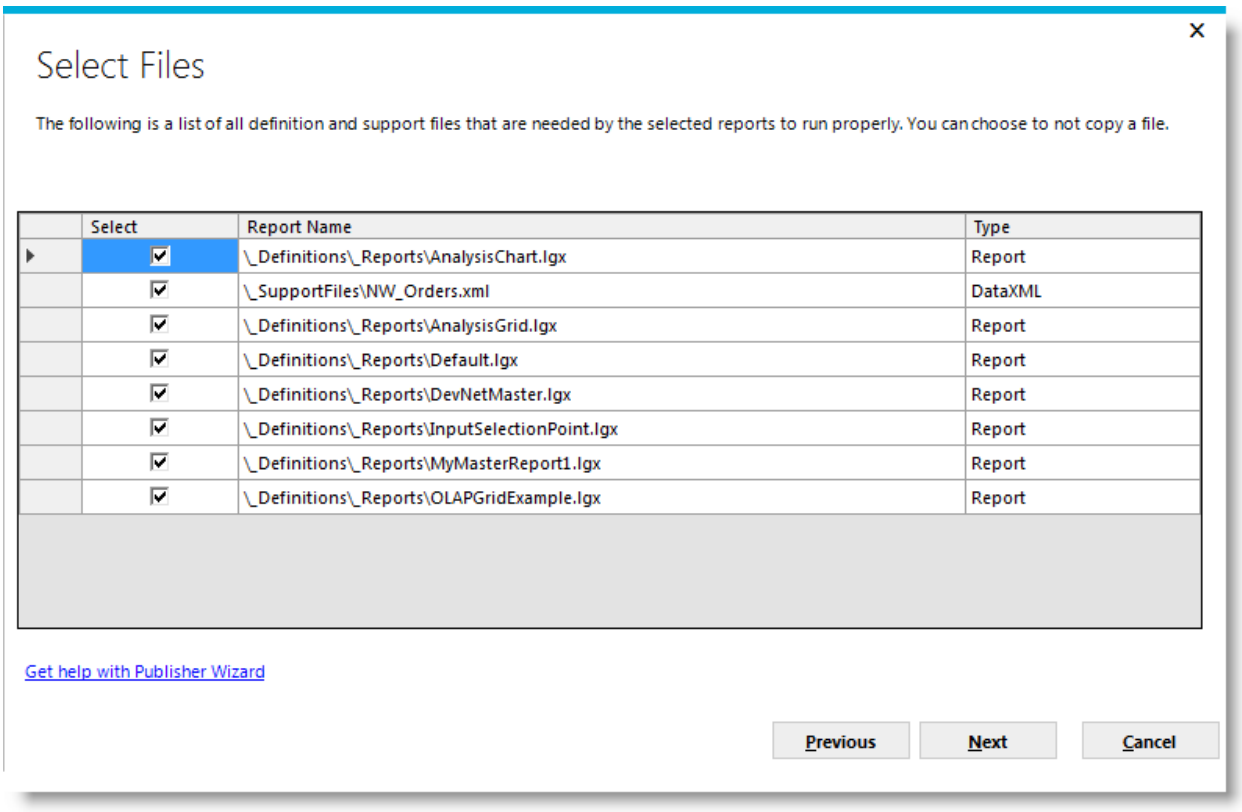


The left pane will identify the folder structure of the Info instance relevant to the report repository. Click on a folder in the left pane to display the list of reports in the right pane contained in the folder.

Click **Select** checkboxes to identify the individual reports to be published. Click the **Select** column header to select all the reports in the list.

Click **Next** to display the list of dependencies identified by the selected report definitions.

The **Select Files** dialog box presents all of the file dependencies for the selected reports:

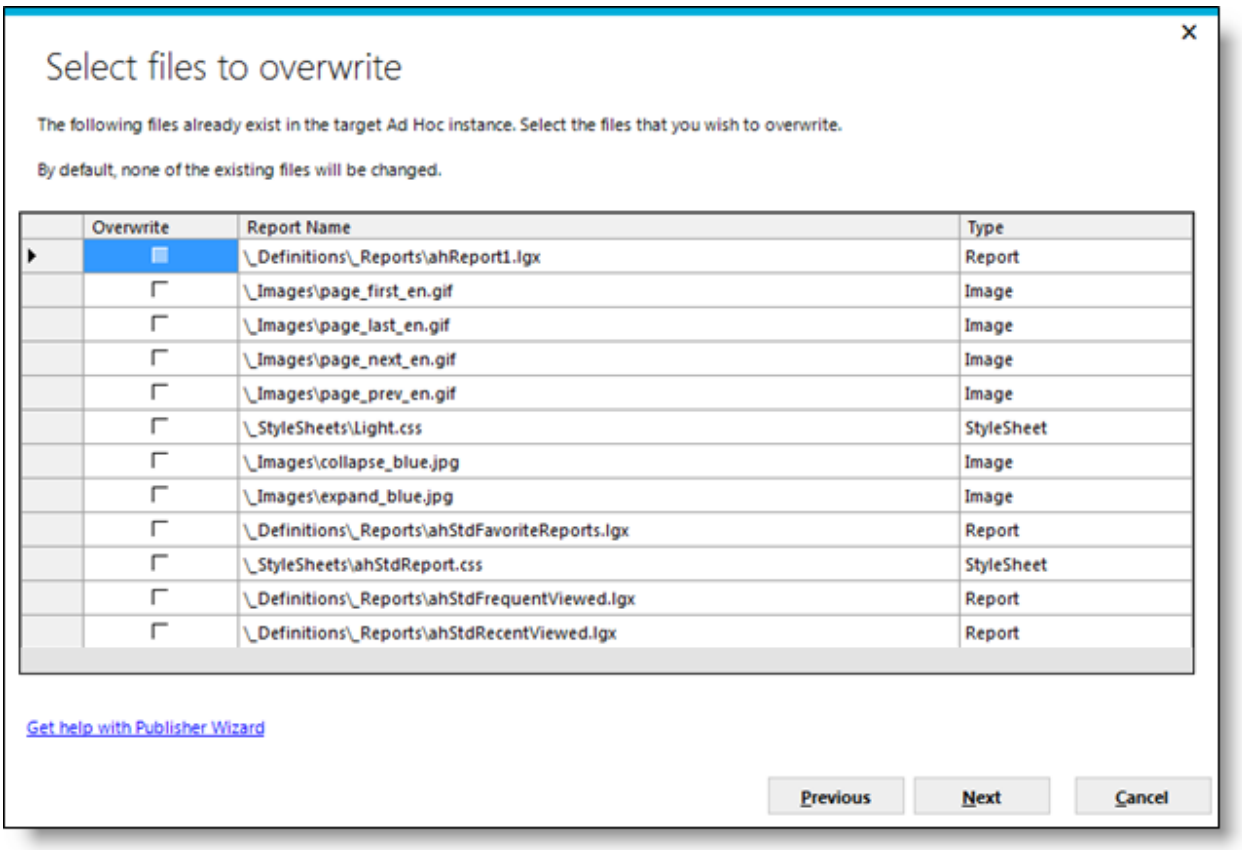


The System Administrator should review the list and determine which files should be copied from the Info application to the Ad Hoc application.

Checked checkboxes (all are checked by default) identify the files to copy. Click the **Select** column header to include/exclude all of the files in the list.

Click **Next** to confirm any files that might be overwritten during the publishing process.

The **Select Files to Overwrite** dialog box displays a list of dependency files for the selected reports that would overwrite existing files in the Ad Hoc instance:

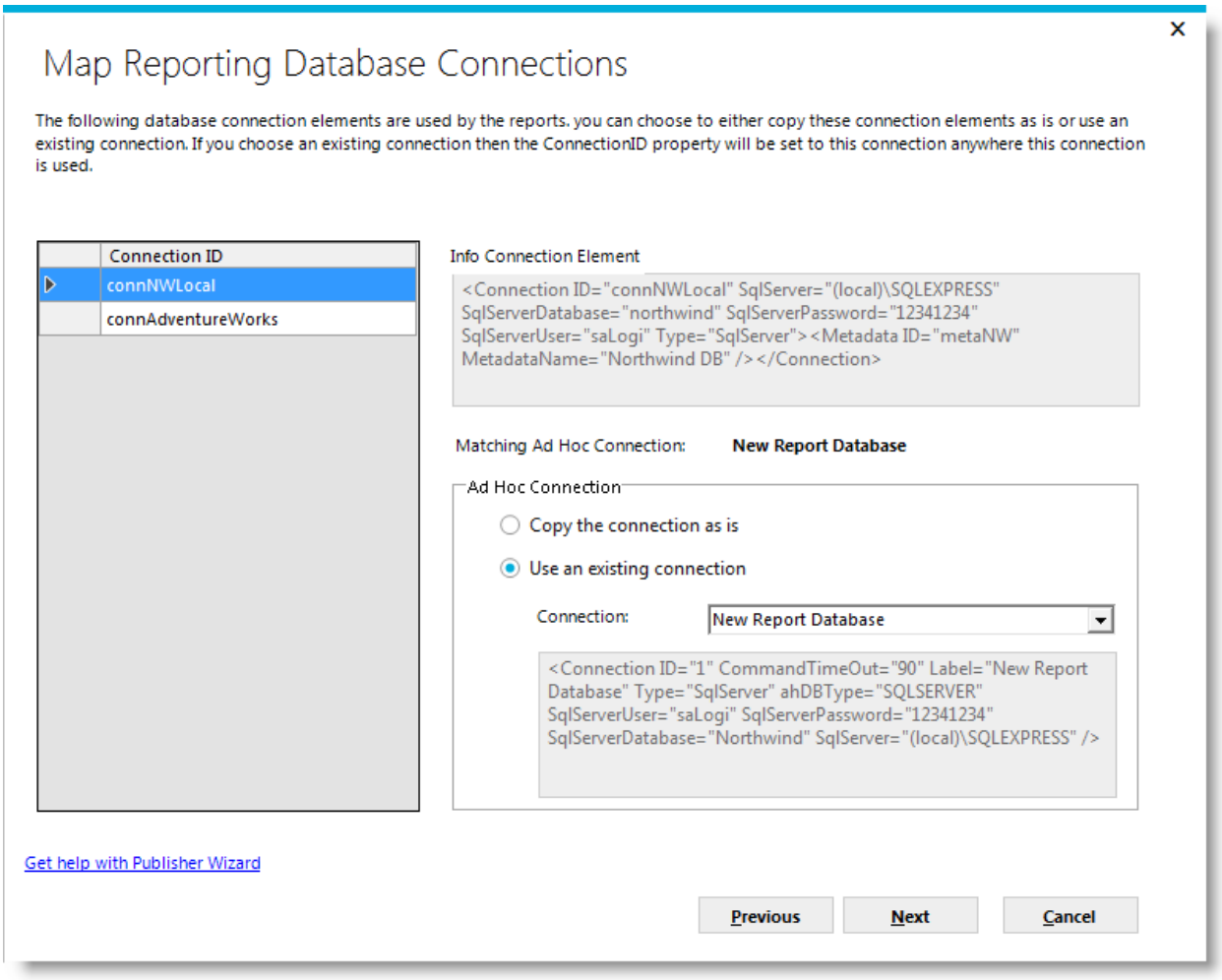


Click **Overwrite** checkboxes to indicate that the corresponding Ad Hoc application file should be overwritten by the file from the Logi Info application, in order to support the Info reports.

Click the **Overwrite** column header to include/exclude all of the files.

Click **Next** to continue to the dialog box that maps the Info connections to the Ad Hoc application.

The **Map Reporting Database Connections** dialog box is displayed next. It allows the System Administrator to correlate the *Connection* elements required by the Info reports to their Ad Hoc equivalents. The System Administrator has two basic options: for each Info connection used by the reports, the administrator can choose to either copy the Info *Connection* element into the Ad Hoc instance or to instruct the Publisher Wizard to use an existing Ad Hoc *Connection* to acquire the data for the reports.



The left panel contains the **Connection ID** of each of the Info application's *Connection* elements that are used by the selected reports. As each ID is highlighted, the information on the right side of the dialog box will change.

The **Info Connection Element** area will display the contents of the Info *Connection* for the highlighted ID.

The **Publisher Wizard** will attempt to match the Info connection information with the Ad Hoc connection information and display the result in the **Matching Ad Hoc Connection**. This is an indicator that the connection has already been mapped.

The **Ad Hoc Connection** frame is where the System Administrator decides whether to copy the Info connection to the Ad Hoc application or to use an Ad Hoc connection that already exists.

Note:

If the Info application connection is copied to the Ad Hoc instance, the report definitions will remain unchanged during the publishing process. They will continue to use the connection ID specified during their development.

However, if the Info application connection is instead mapped to an existing Ad Hoc connection, the report definitions *will* be changed. The new Ad Hoc connection ID will replace the existing connection ID's in the Info application's report definition files where necessary.

Each Info connection must be redisplayed in some form in the Ad Hoc application for the reports to be able to connect to a data source.

Once all of the Info connections have been mapped or designated for copy, click **Nex**t to complete the Publisher Wizard functions. The **Finish** dialog box will be displayed.

The **Finish** dialog box presents a report of the actions taken during the publishing process. The report is stored in the *Log* folder of the instance as *Publisher_Update_Log.html*.

Notes:

Published reports will appear in the Admin's *Personal Reports* folder. If the published report has connections mapped to an Ad Hoc connection, the reports will be visible in the list of reports for the associated reporting database connection.

Reports continuing to use the Info connections to the database will not be filtered by the database dropdown and will be visible regardless of which reporting database is selected in Ad Hoc.

Published reports cannot be modified in Ad Hoc.

A published report can be updated by simply replacing its definition file.

If a published report is copied within Ad Hoc, then replacing the originally published report definition file will have no effect on the copied report.

Instance Synchronization

The term “Synchronization” refers to the process of migrating metadata and/or reports between Ad Hoc instances. The core component of the synchronization process is the creation and application of a Metadata Synchronization Package, an XML-based file that holds all of the configuration information about objects, reports, and report schedules that need to be synchronized.

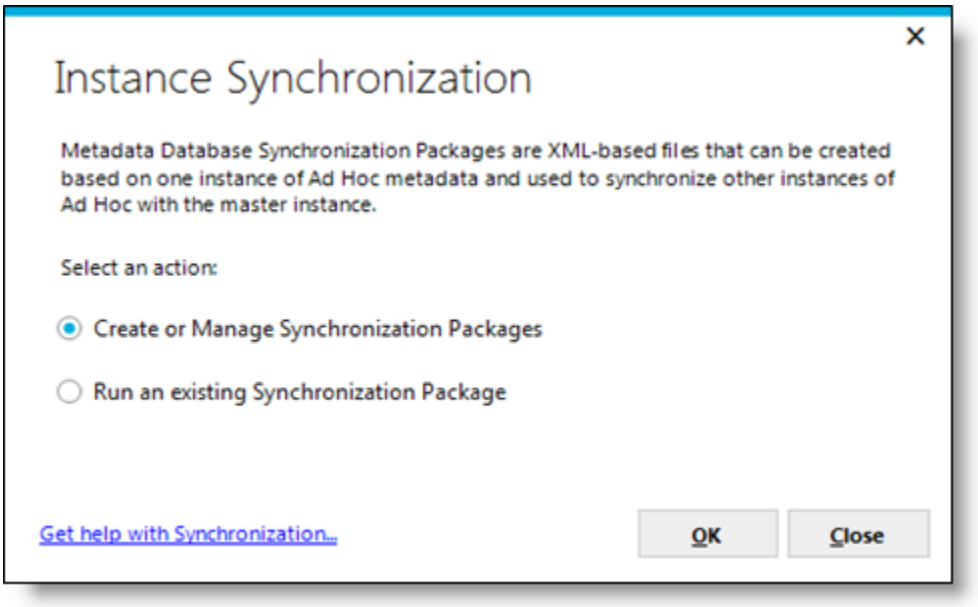
Here’s an overview of the synchronization process:

- Using the Management Console, select the source Ad Hoc instance.
- Create a synchronization package containing the required items (metadata, reports, etc.) from the source instance.
- Select the target instance of Ad Hoc and the active connection.
- Apply the synchronization package to the target instance.

Note:
A synchronization package is an XML file. The file needs to be accessible on the server hosting the target instance before it can be applied to the instance.

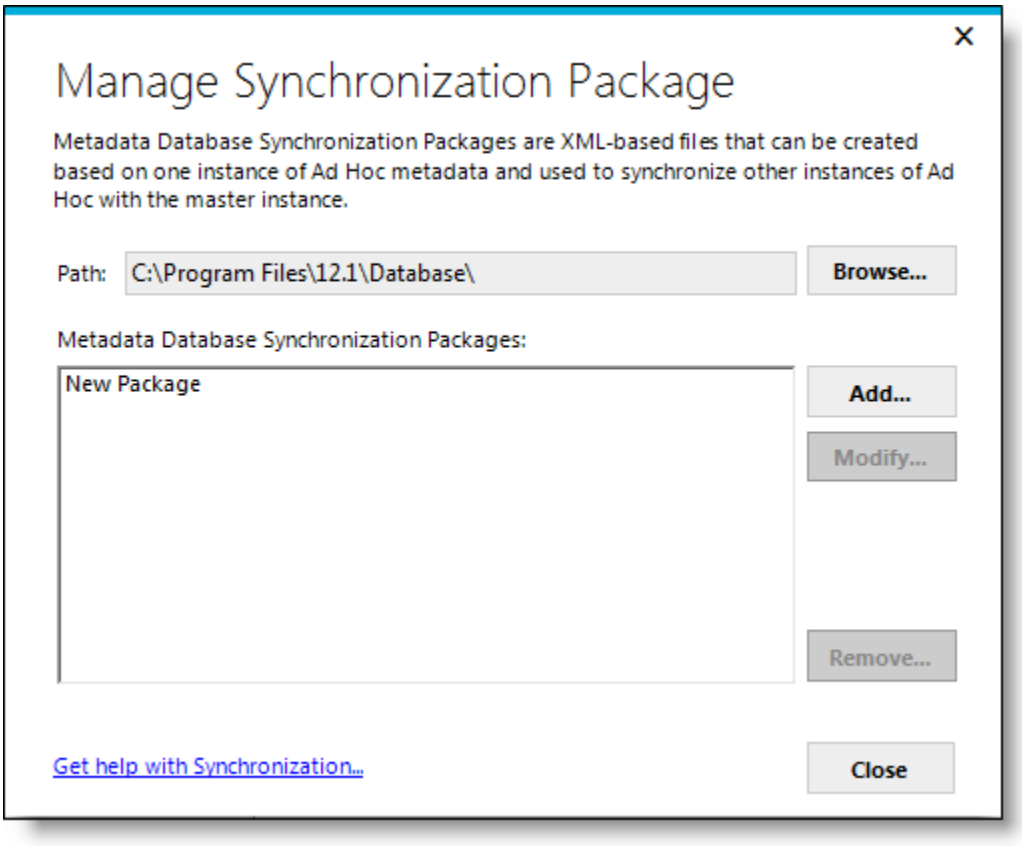
Creating a Synchronization Package

To create a synchronization package, click **Tools** and then **Synchronize**. The following **Instance Synchronization** dialog box will be displayed:



Note:
Make sure the appropriate source instance and active reporting connection has been selected prior to creating the synchronization package. The default Organization will also be used as the source. The reporting connection and the Organization used as the source for the synchronization package content can be reset by clicking the **Advanced View** link and the **Settings** link.

Select the *Create or Manage Synchronization Packages* option and click **OK** to display the **Manage Synchronization Packages** dialog box:



The typical process for creating a synchronization package is:

1) Identify the synchronization package file name.

2) Select items from the current active instance and active reporting database connection to be synchronized in the **Package Definition** dialog box, using either the “Simple” or “Advanced” view and click **Next.**

3) Review the Package Definition. Items are categorized and presented in a tree structure. Synchronized categories of items are listed alphabetically and each category of item can be expanded to review the individual items. Options requested for any level of the tree are shown in parenthesis.

4) Make any adjustments necessary to achieve the desired result by clicking **Previous.**

5) Save the synchronization package file by clicking **Save.**

6) The creation of a synchronization package can be terminated at any time by clicking **Cancel.**

Synchronization packages can be added, modified and removed from the **Manage Synchronization Package** dialog box. The *Path* field identifies the storage location of the synchronization packages (defaults to the `Database` folder of the active instance).

We suggest that you select a path for the synchronization package that is memorable and readily accessible to the instances that might be the target for the synchronization.

Click **Browse** to select a different location for the synchronization package(s).

To create a new synchronization package, click **Add**.

To modify an existing synchronization package, highlight the file in the list and click **Modify** (which is enabled when a file is highlighted).

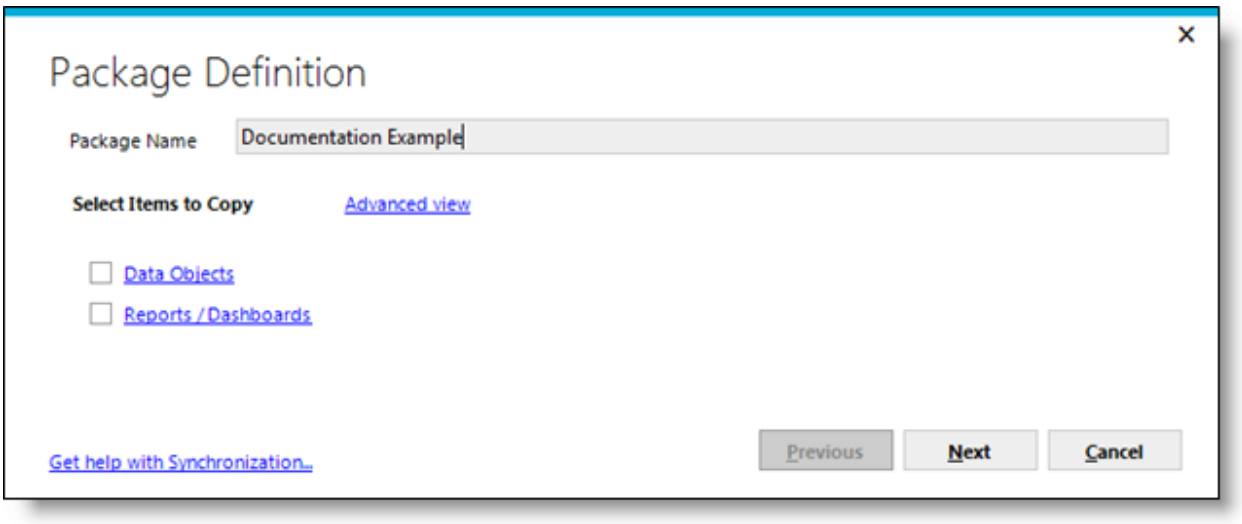
To remove an existing synchronization package, highlight the file in the list and click **Remove** (which is enabled when a file is highlighted). A confirmation dialog box will be displayed prior to removing the file.

Click **Close** to dismiss the **Manage Synchronization Packages** dialog box.

Hint:

Synchronization packages are built on metadata from the active instance and reporting connection. In addition, the synchronization process assumes that the default Organization will be used.

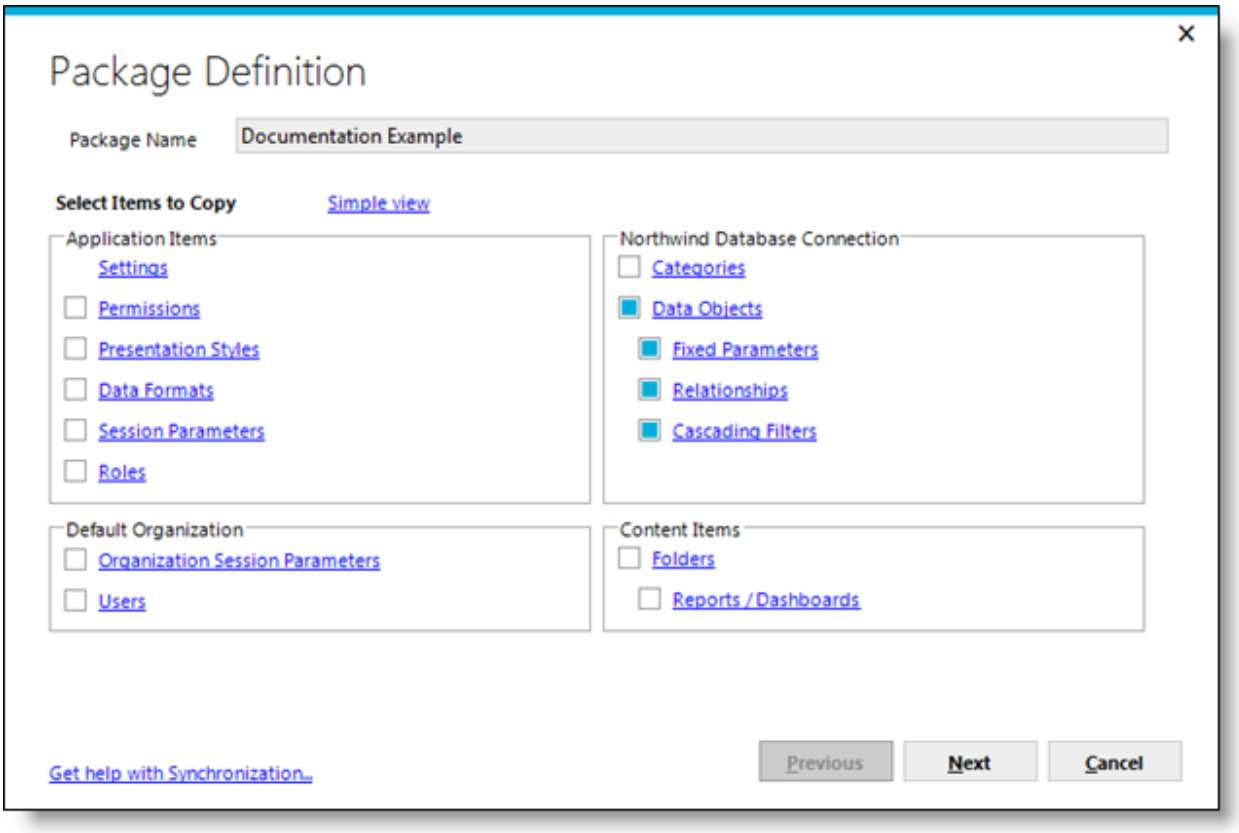
After clicking **Add** (or **Modify**), the **Metadata Database Synchronization Settings** dialog box is displayed:



The **Package Name** field is the file name of the synchronization package. By default, the package name is set to “New Package”. This should be changed to reflect the purpose or content of the synchronization package.

The most common usage of the synchronization tool is to replicate data object and/or reports from a source instance and active connection to a target instance. Consequently, these two options are singled out in the initial dialog box as part of the “Simple View”. The System Administrator has the option, via the **Advanced View** link, to synchronize virtually everything from the source instance and connection to a target instance. The “Advanced View” may also be used to review what has been requested by virtue of actions on the “Simple View”.

For example, if the System Administrator checks the checkbox for **Data Objects** in the “Simple View” clicking on the **Advanced View** link will identify what items are automatically included in the synchronization package, as shown below.



In the image above, Data Objects have been enabled and the Data Objects link was clicked to show the underlying items that are selected by default.

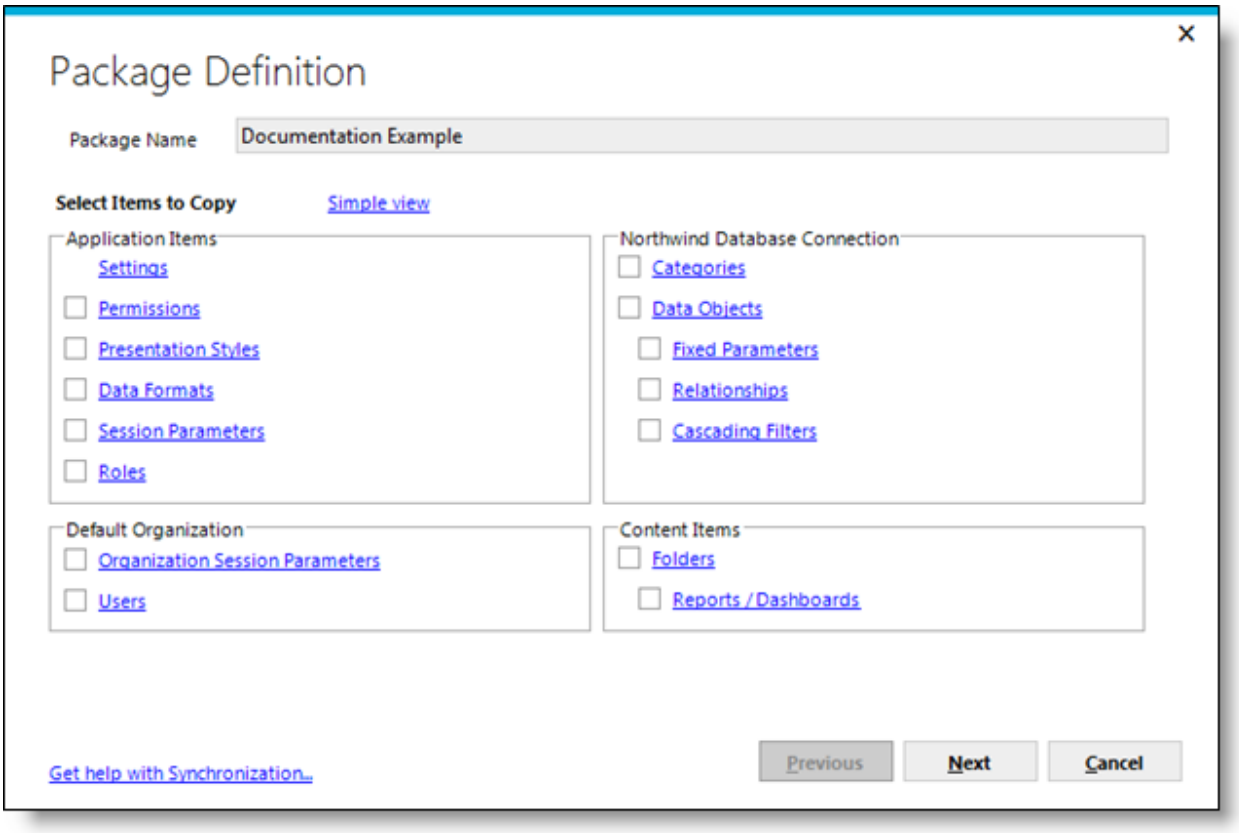
From the **Simple View**, checking the **Data Objects** option will add all of the data object and column information, fixed parameters, relationships and cascading filters to the synchronization package. By default, *Links* and *Access Rights* for the data objects and categories of data objects are not included in the synchronization package. The default behavior for the synchronization is to add items to the target instance if they do not exist.

Checking the **Reports** option will add all of the Ad Hoc report definitions to the synchronization package. By default, report ownership and folder information will be retained when the synchronization is applied to the target instance and reports will only be added to the target instance if they do not exist.

Note:

Only reports and report schedules developed in Logi Ad Hoc will be included in the synchronization package.

Let's look more closely at the **Advanced View** dialog box:



The **Simple View** link will toggle the dialog box back to the simpler dialog box.

The **Advanced View** dialog box is divided into four frames.

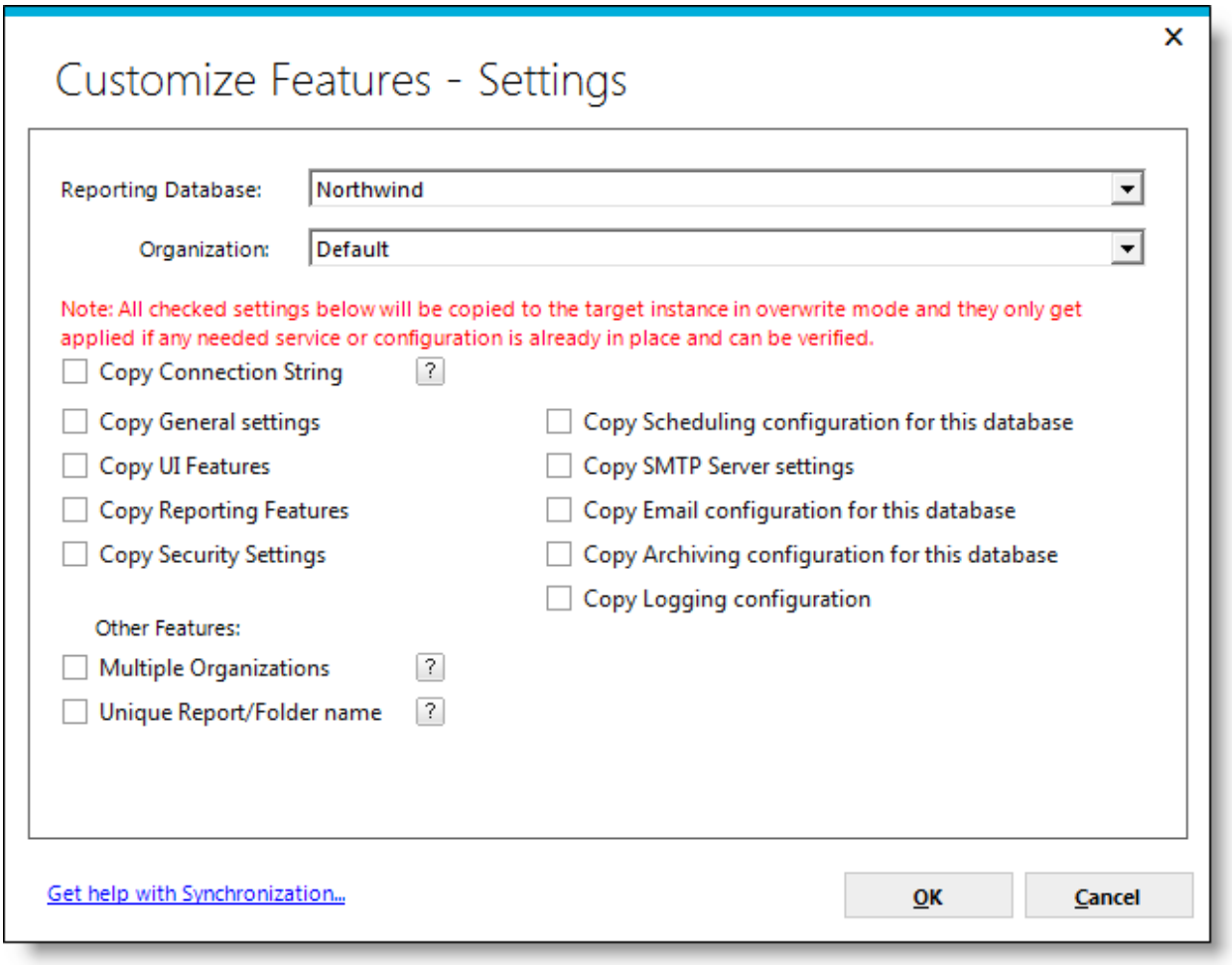
- Application Items - The items in this frame have application scope. Permissions and roles relate to the general security model. Presentation styles and data formats are report formatting options. Session parameters are the application-wide session variables defined in the source instance.

- Organization - The frame label identifies the organization used as the source of information for the synchronization package. In the example the organization name is “Default”. Users identify the user community associated with the selected organization. Organization Session Parameters identify the session variables associated with the organization.
- Database Connection - The frame label identifies the reporting database connection used as the source of information for the synchronization package. In the example the reporting connection is identified as “Northwind Source”. Categories of data objects, data objects and columns, related fixed parameters, relationships and cascading filters may be selected for inclusion in the synchronization.
- Content Items - The items in this frame are the folder architecture and report information that may be included in the synchronization package.

Individual frame controls are described below:

Application Items

Settings – Clicking the Settings link will display the following dialog box:



The **Settings** dialog box allows the user to change the **Reporting Database** and **Organization** used as the source of information for the synchronization package.

Note:

Changing the reporting database or organization will erase all current pending actions performed on the current synchronization package.

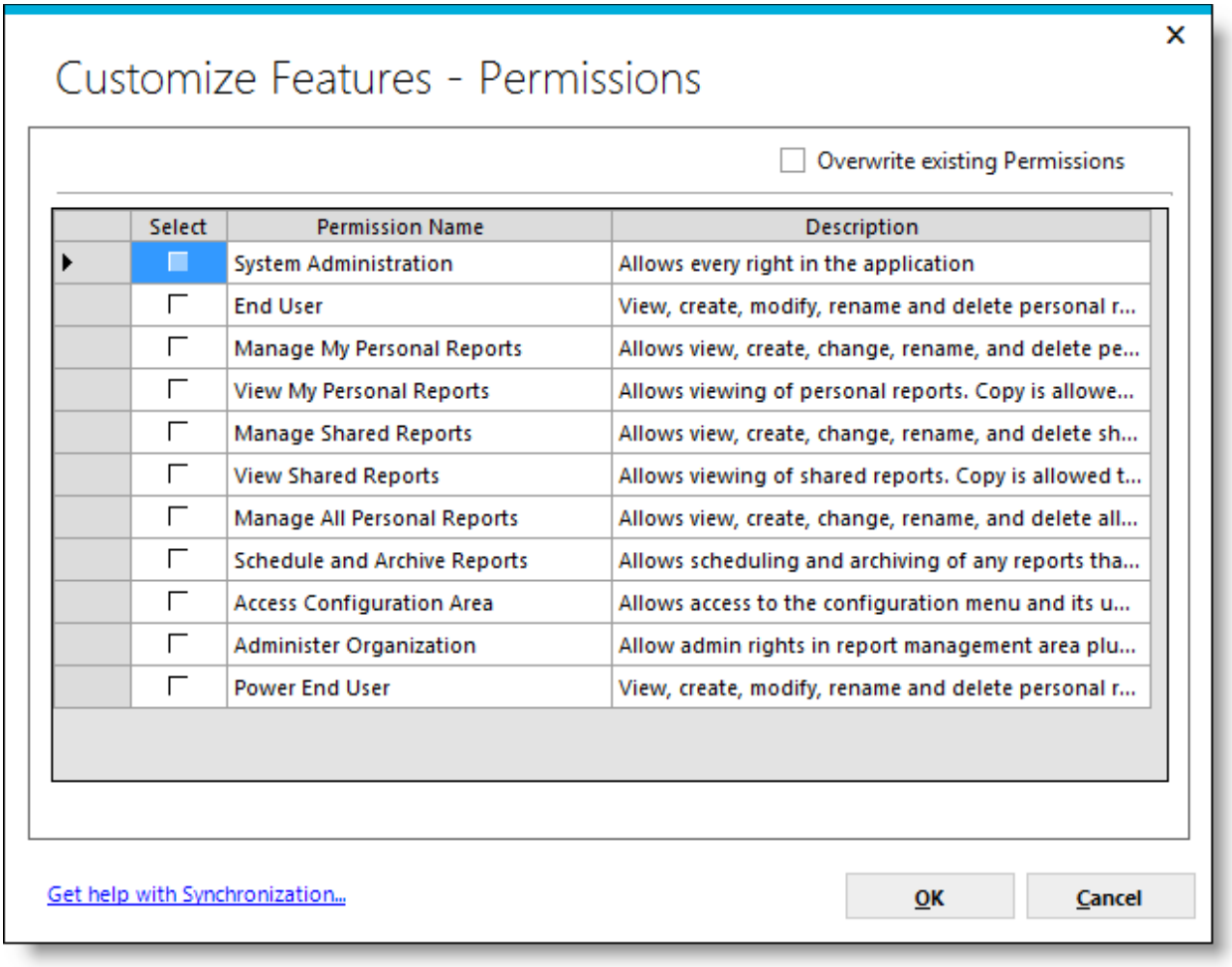
All of the options presented in this dialog box identify configuration options that might be replicated in the `_Settings.lgx` file of the target instance. Selecting these options *does not* ensure that they will be replicated in the target instance when the synchronization package is applied. All of the options are

applied as an “overwrite”; however, the option will not be applied if a required service is not available or the option cannot be verified.

Click the ? icon to receive additional information regarding the associated option.

Click **OK** to temporarily save the selected options in the synchronization package.

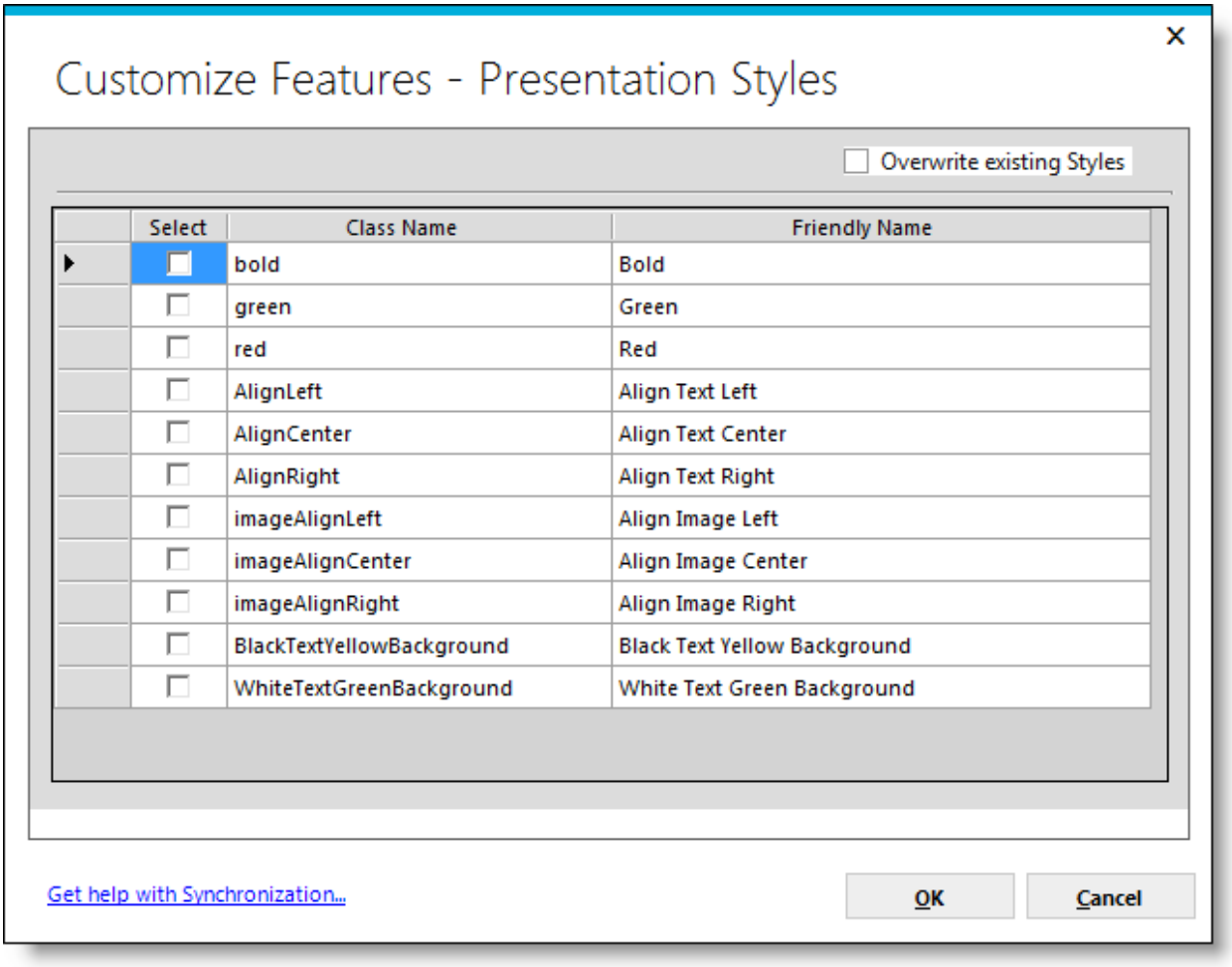
Permissions – Checking the checkbox will direct that all permission information be added to the synchronization package and, when applied, will cause the permissions to be added to the target instance, if they do not already exist. Clicking the Permissions link will display the following dialog box:



Individual permissions can be selected by checking the associated checkbox. All permissions can be toggled at once by clicking the **Select** column header. The default behavior is to add missing permissions to the target instance. Check the **Overwrite existing Permissions** checkbox to replicate the permissions in the target instance.

Click **OK** to temporarily save the selected permissions in the synchronization package.

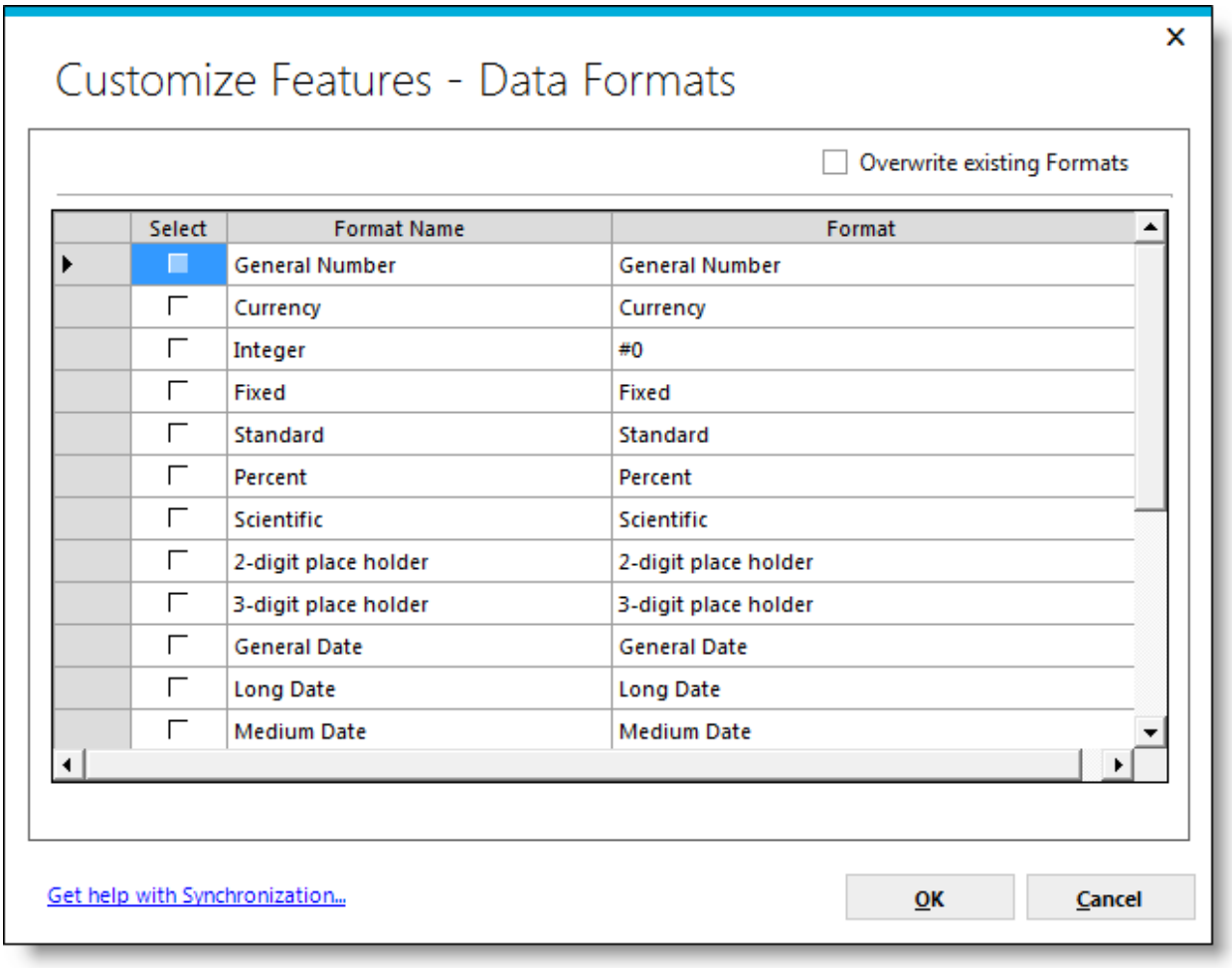
Presentation Styles – Checking the checkbox will direct that presentation style information be added to the synchronization package and, when applied, presentation styles will be added to the target instance, if they do not already exist. Clicking on the Presentation Styles link will display the following dialog box:



Individual presentation styles can be selected by checking the associated checkbox. All presentation styles can be toggled at once by clicking the **Select** column header. The default behavior is to add missing presentation styles to the target instance. Check the **Overwrite existing Styles** checkbox to replicate the presentation styles in the target instance.

Click **OK** to temporarily save the selected presentation styles in the synchronization package.

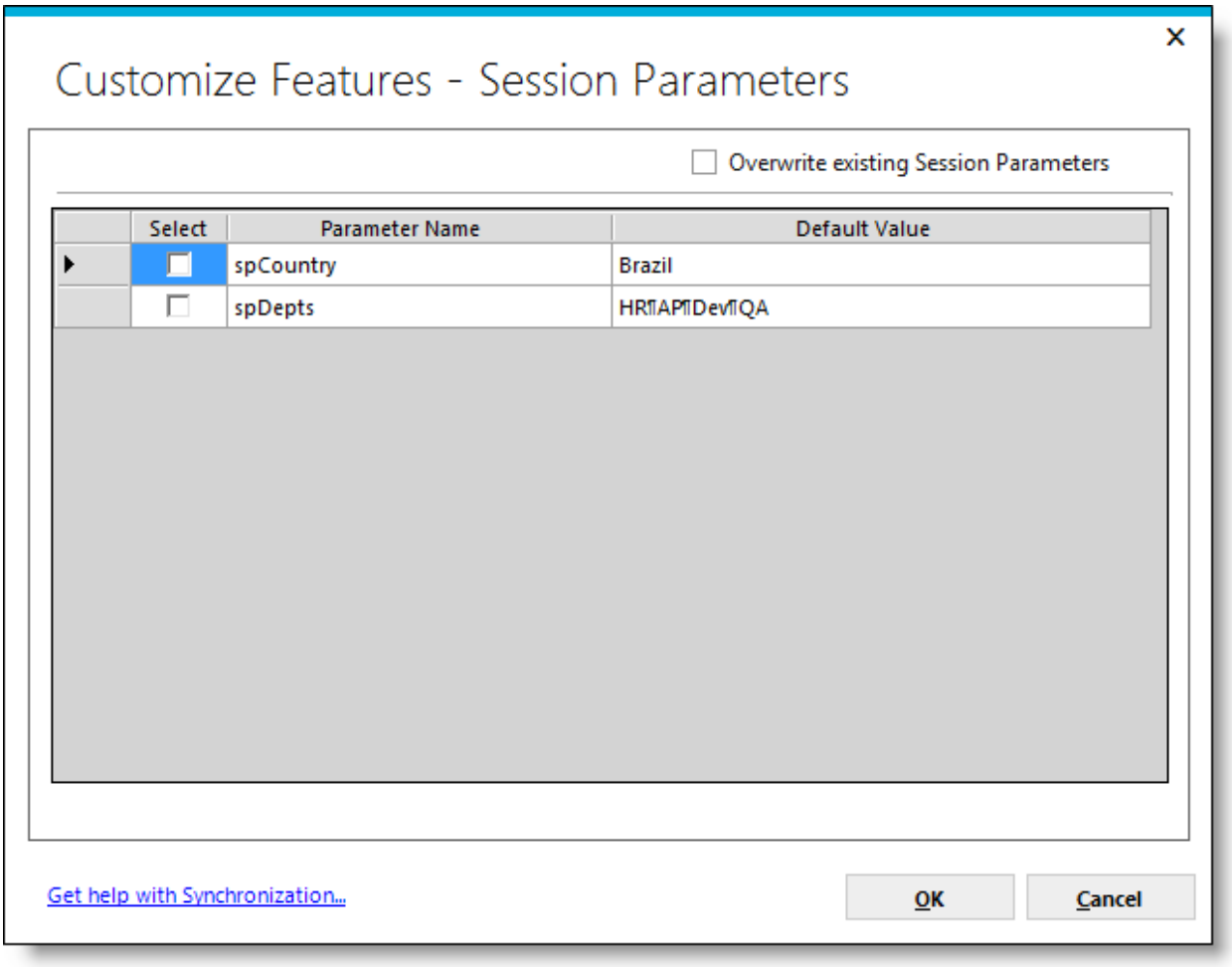
Data Formats – Checking the checkbox will direct that all data format information be added to the synchronization package and, when applied, data formats will be added to the target instance, if they do not already exist. Clicking on the Data Formats link will display the following dialog box:



Individual data formats can be selected by checking the associated checkbox. All data formats can be toggled at once by clicking the **Select** column header. The default behavior is to add missing data formats to the target instance. Check the **Overwrite existing Formats** checkbox to replicate the data formats in the target instance.

Click **OK** to temporarily save the selected data formats in the synchronization package.

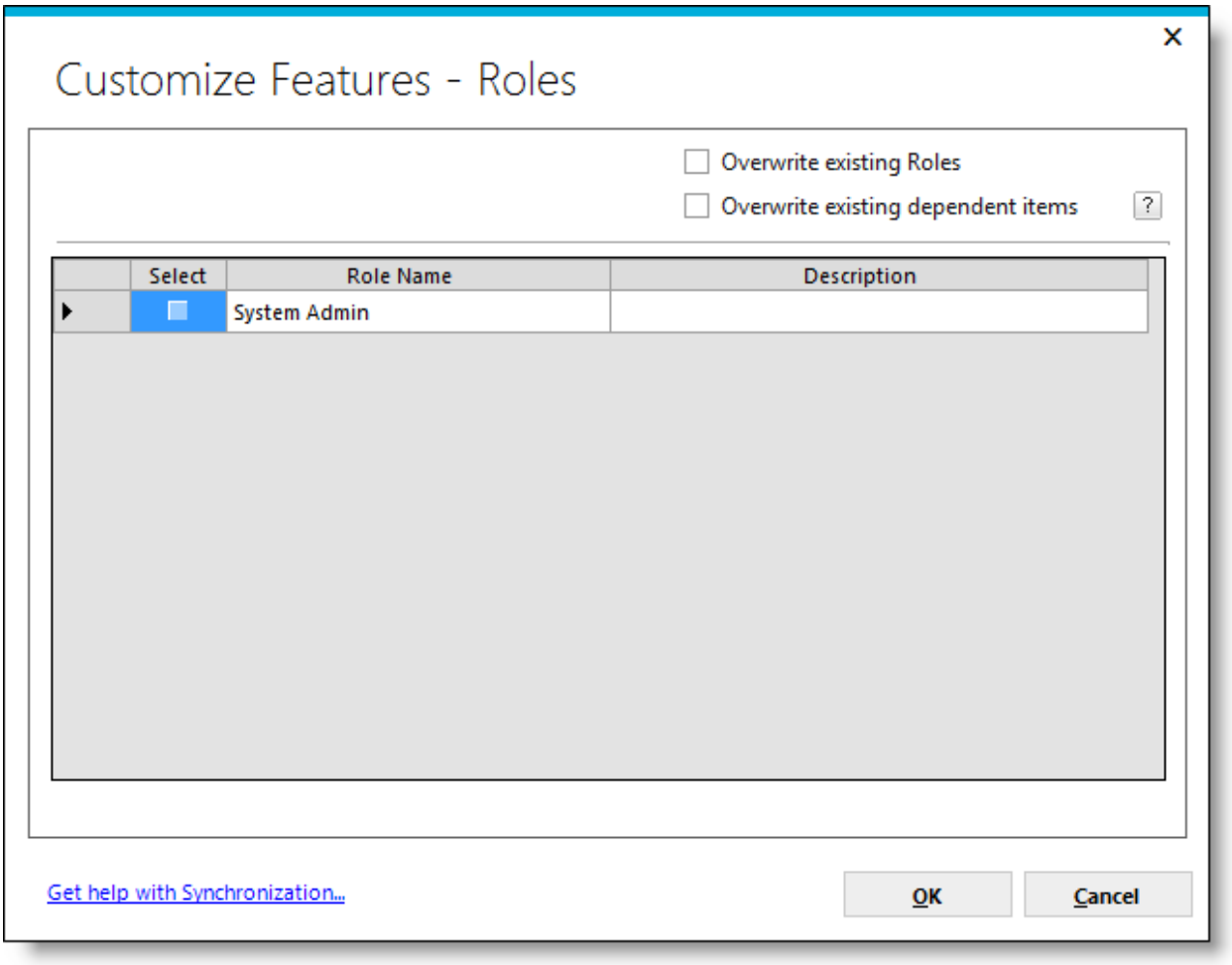
Session Parameters –Checking the checkbox will direct that all session parameter information will be added to the synchronization package and, when applied, session parameters will be added to the target instance, if they do not already exist. Clicking the Session Parameters link will display the following dialog box:



Individual session parameters can be selected by checking the associated checkbox. All session parameters can be toggled at once by clicking on the **Select** column header. The default behavior is to add missing session parameters to the target instance. Check the **Overwrite existing Session Parameters** checkbox to replicate the session parameters in the target instance.

Click **OK** to temporarily save the selected session parameters in the synchronization package.

Roles – Checking the checkbox will direct that all role information will be added to the synchronization package and, when applied, roles will be added to the target instance, if they do not already exist. Clicking on the link will display the following dialog box:



Individual roles can be selected by checking the associated checkbox. All roles can be togged at once by clicking the **Select** column header. The default behavior is to add missing roles to the target instance. Check the **Overwrite existing roles** checkbox to replicate the roles in the target instance.

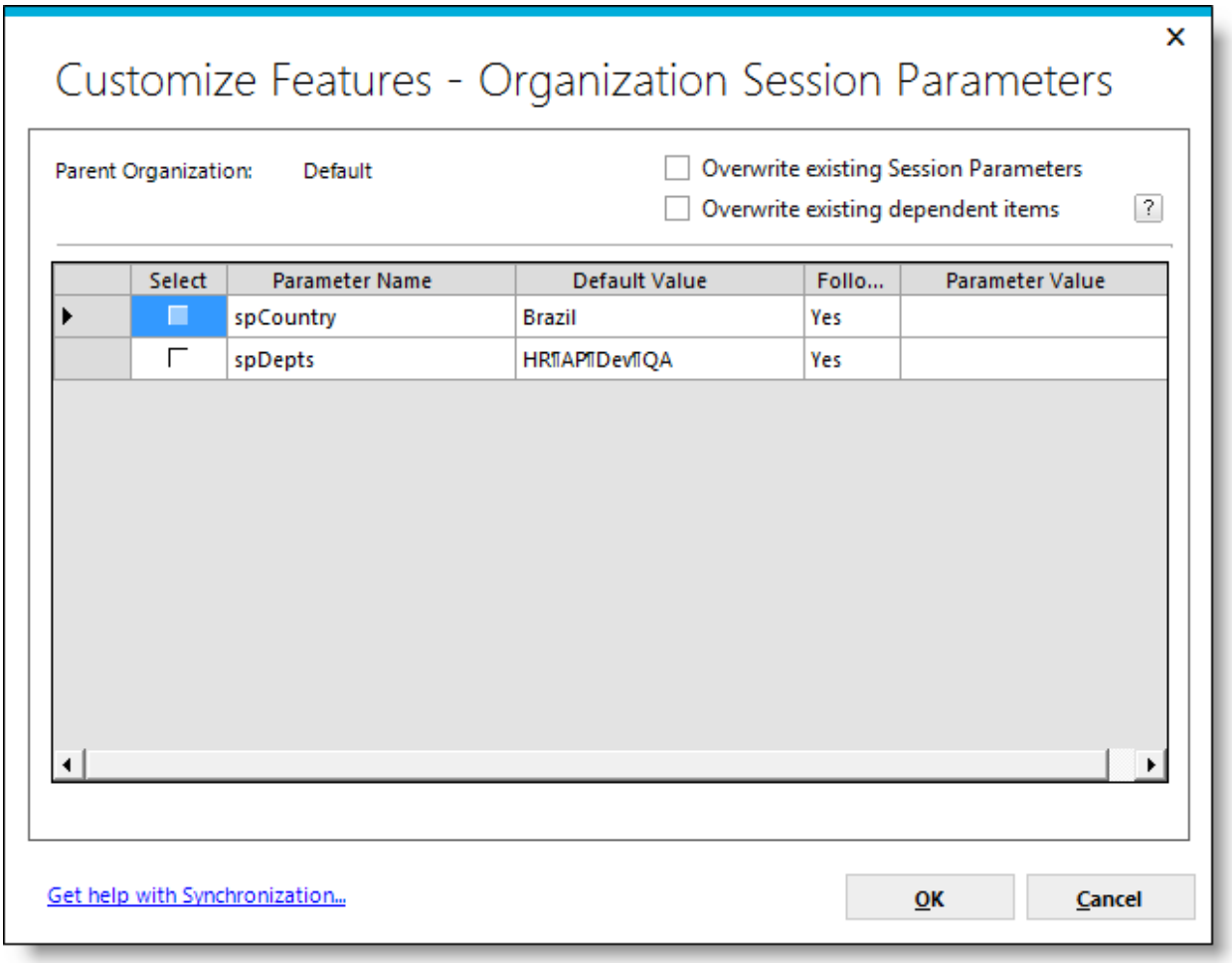
Roles are dependent upon permission packages. Permission packages may be synchronized independently of roles; however, checking **Overwrite existing dependent items** will include permission package information related to the selected roles in the synchronization package and, when applied to the target instance, overwrite the permission package(s) if they exist.

Click the ? icon to see additional information regarding the associated option.

Click **OK** to temporarily save the selected roles in the synchronization package.

Selected Organization

Organization Session Parameters – Checking the checkbox will direct that all organization session parameter information will be added to the synchronization package and, when applied, organization session parameters will be added to the target instance, if they do not already exist. Clicking the Organization Session Parameters link will display the following dialog box:



Individual organization session parameters can be selected by checking the associated checkbox. All organization session parameters can be toggled at once by clicking the **Select** column header. The default behavior is to add missing organization session parameters to the target instance. Check the

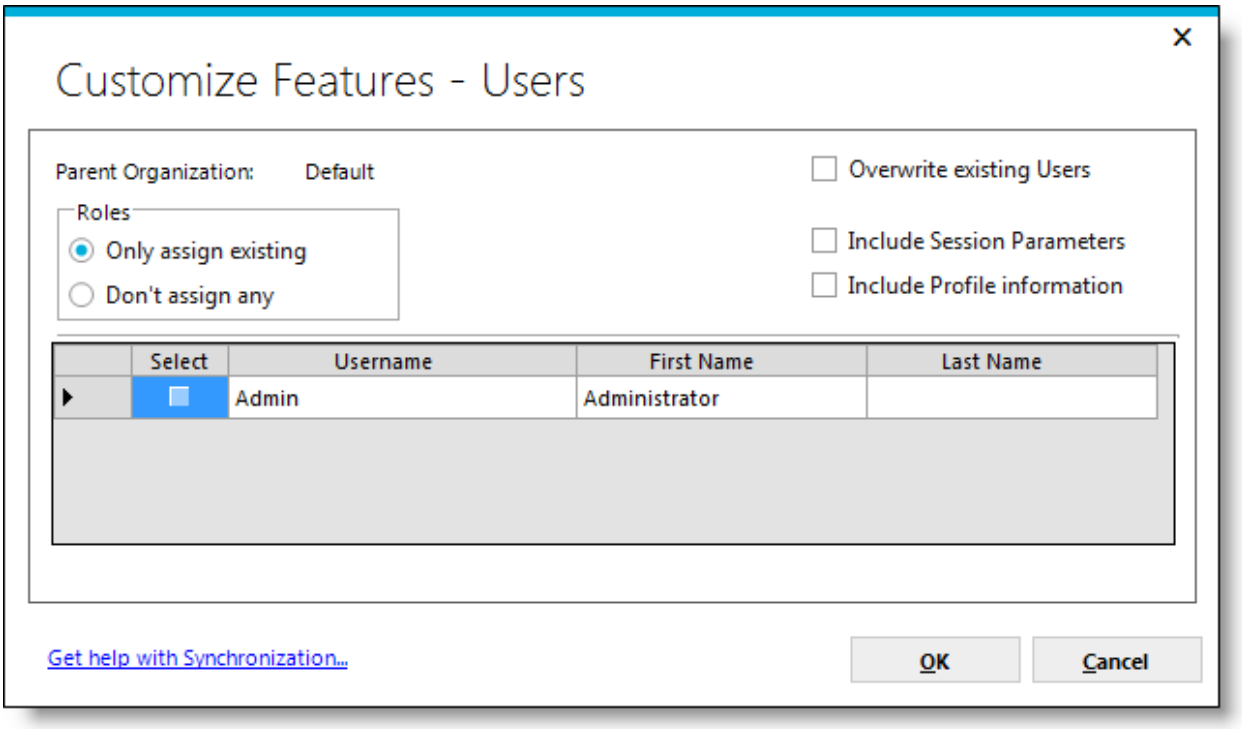
Overwrite existing Session Parameters checkbox to replicate the organization session parameters in the target instance.

Organization session parameters depend on the application session parameters. To the extent possible, the dependencies will be created if they don't exist in the target instance. If **Overwrite existing dependent items** is checked, existing dependencies will be overwritten with the new information when the synchronization package is applied to the target instance.

Click the ? icon to see additional information regarding the associated option.

Click **OK** to temporarily save the selected organization session parameters in the synchronization package.

Users – Checking the checkbox will direct that all user information be added to the synchronization package and, when applied, users will be added to the target instance, if they do not already exist. In addition, the synchronization process will, by default, assign roles to the user in the target instance that match the roles coming from the source instance. Clicking the Users link will display the following dialog box:



Individual users can be selected by checking the associated checkbox. All users can be toggled at once by clicking the **Select** column header. The default behavior is to add missing users to the target instance. Check the **Overwrite existing Users** checkbox to replicate the users in the target instance.

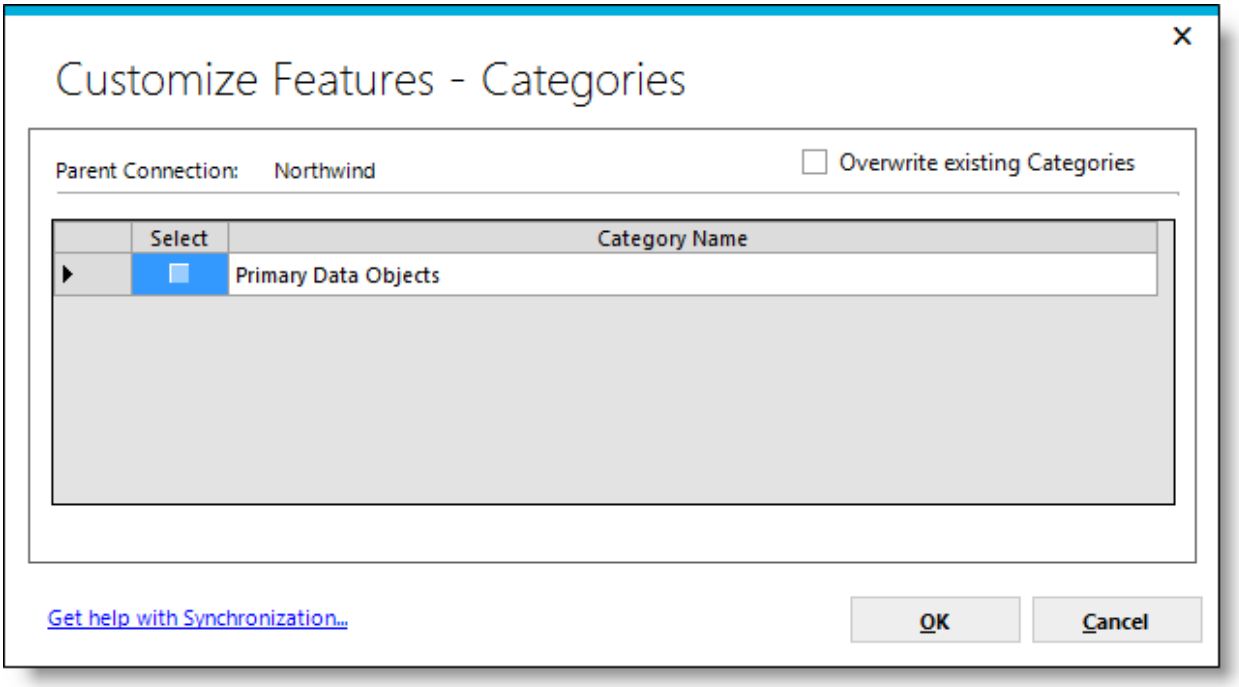
User may be created in the target instance without roles by selecting the **Don't assign any** option in the Roles frame.

If the session parameter information for a user should be replicated in the target instance, check **Include Session Parameters**. If the user profile information should be replicated in the target instance, check **Include Profile Information**. By default, neither the user session parameter information nor the profile information will be applied to the user in the target instance.

Click **OK** to temporarily save the selected user information in the synchronization package.

Selected Database Connection

Categories – Checking the checkbox will direct that all category information be added to the synchronization package and, when applied, categories will be added to the target instance, if they not already exist. Clicking the Categories link will display the following dialog box:

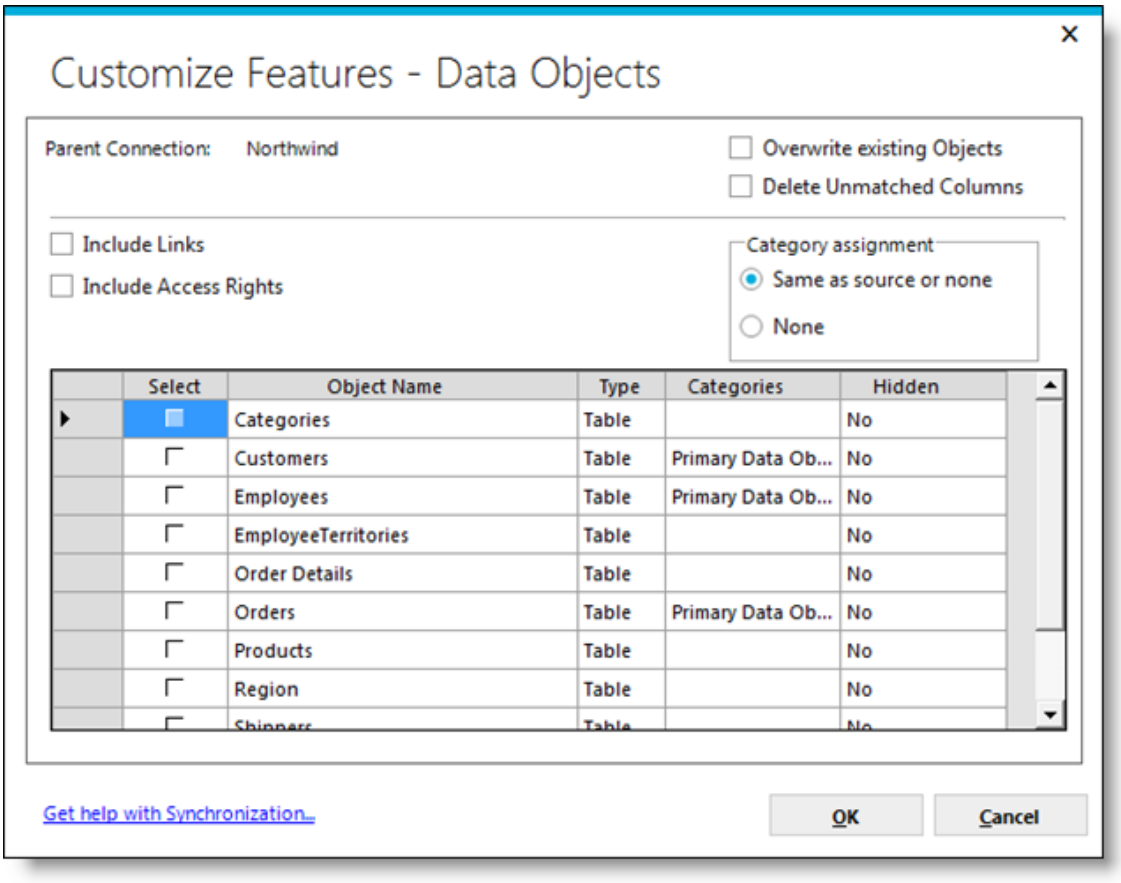


Individual categories can be selected by checking the associated checkbox. All categories can be toggled at once by clicking the **Select** column header. The default behavior is to add missing categories to the target instance. Check the **Overwrite existing categories** checkbox to replicate the categories in the target instance.

Click **OK** to temporarily save the selected categories in the synchronization package.

Data Objects – Checking the checkbox will direct that all data object information be added to the synchronization package and, when applied, data objects will be added to the target instance, if they do not already exist. In addition, all fixed parameter, relationship, and cascading filter information will be included in the synchronization package as well and will be added to the target instance. By default, data objects will be added to existing categories in the target instance that match the categories in the source instance. If the categories do not match, data objects will be uncategorized in the target instance.

Clicking the Data Objects link will display the following dialog box:



Individual data objects can be selected by checking the associated checkbox. All data objects can be toggled at once by clicking the **Select** column header. The default behavior is to add missing data objects to the target instance. Check the **Overwrite existing objects** checkbox to replicate the data objects in the target instance. Check **Delete Unmatched Columns** to delete columns that don't exist in the source instance.

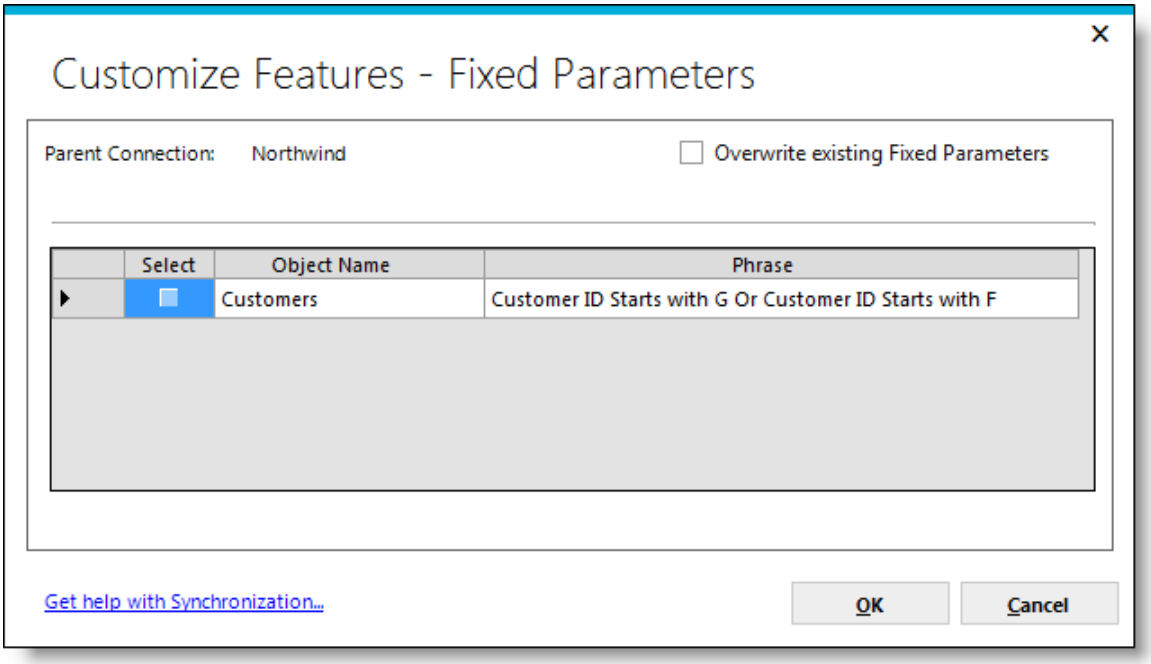
Check the **Include Links** checkbox to add the linked column information for the selected data objects to the synchronization package. Check **Include Access Rights** to add object and column access rights for the selected data objects to the synchronization package. By default, links and access rights are not included in the synchronization information.

Data objects will not be assigned to categories in the target instance if the **None** option is selected in the *Category Assignment* frame.

Click **OK** to temporarily save the selected data objects in the synchronization package.

Fixed Parameters – Checking the checkbox will direct that all fixed parameter information be added to the synchronization package and, when applied, fixed parameters will be added to the target instance, if they do not already exist. *Fixed parameters are associated with data objects. The related data object must exist in the target for the fixed parameter to be applied.*

Clicking on the Fixed Parameters link will display the following dialog box:

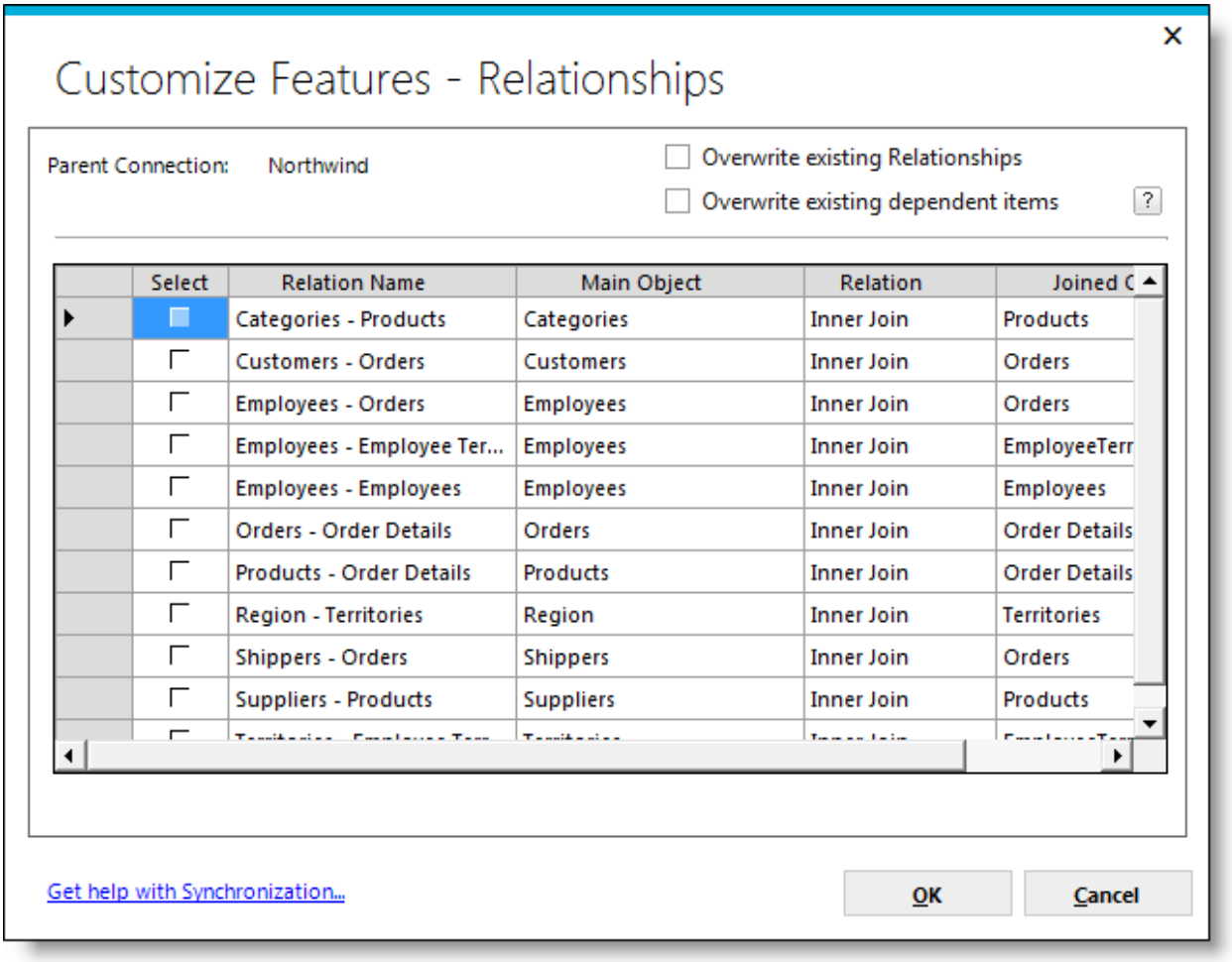


Individual fixed parameters can be selected by checking the associated checkbox. All fixed parameters can be toggled at once by clicking the **Select** column header. The default behavior is to add missing fixed parameters to the related data objects in the target instance. Check the **Overwrite existing fixed parameters** checkbox to replicate the fixed parameters in the target instance.

Click **OK** to temporarily save the selected fixed parameters in the synchronization package.

Relationships – Checking the checkbox will direct that all data relationship information be added to the synchronization package and, when applied, relationships will be added to the target instance, if they do not already exist. *Relationships are associated with data objects and columns. The related data objects and columns must exist in the target for the relationship to be applied.*

Clicking on the Relationships link will display the following dialog box:



Individual relationships can be selected by checking the associated checkbox. All relationships can be toggled at once by clicking the **Select** column header. The default behavior is to add missing relationships for the related data objects in the target instance. Check the **Overwrite existing relationships** checkbox to replicate the relationships in the target instance.

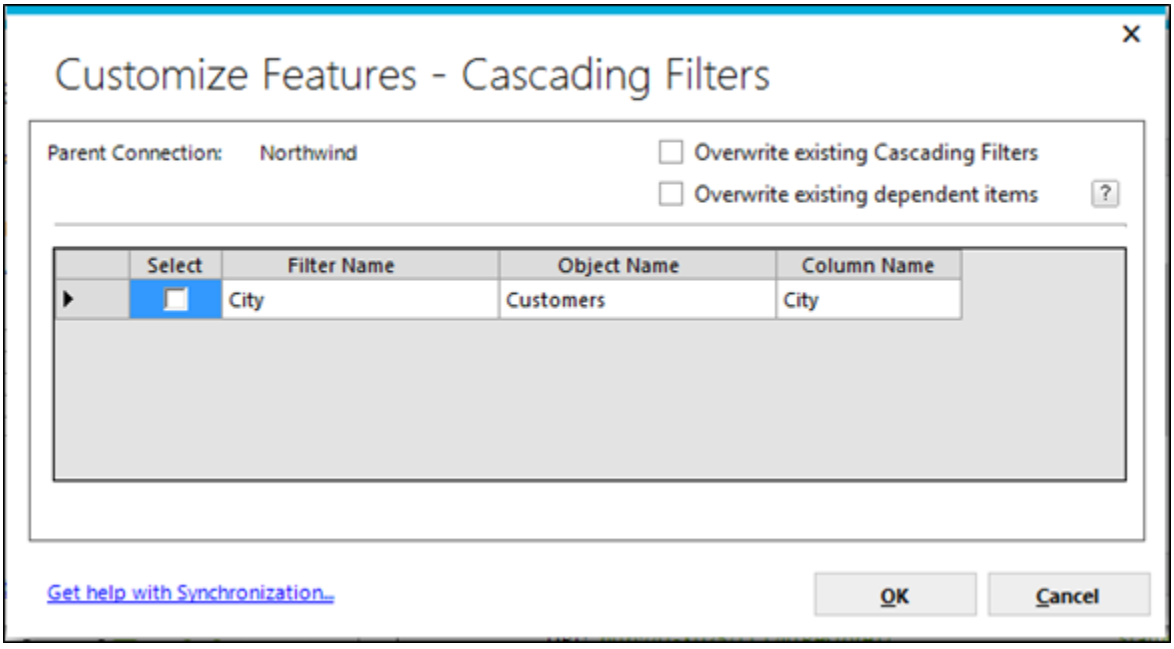
Relationships are dependent on data objects and columns and will not, by default, be added to the target instance if the dependencies do not exist. Dependent items may be affected by synchronizing relationships providing that **Overwrite existing dependent items** is checked.

Click the ? icon to see additional information regarding the associated option.

Click **OK** to temporarily save the selected relationships in the synchronization package.

Cascading Filters – Checking the checkbox will direct that all cascading filter information be added to the synchronization package and, when applied, cascading filters will be added to the target instance, if they do not already exist. *Cascading filters are associated with data objects and columns. The related data objects and columns must exist in the target for the cascading filter to be applied.*

Clicking the Cascading Filters link will display the following dialog box:



Individual cascading filters can be selected by checking the associated checkbox. All cascading filters can be toggled at once by clicking the **Select** column header. The default behavior is to add missing

cascading filters in the target instance. Check the **Overwrite existing cascading filters** checkbox to replicate the cascading filters in the target instance.

Cascading filters are dependent on data objects and columns and will not, by default, be added to the target instance if the dependencies do not exist. Dependent items may be affected by synchronizing cascading filters providing that **Overwrite existing dependent items** is checked.

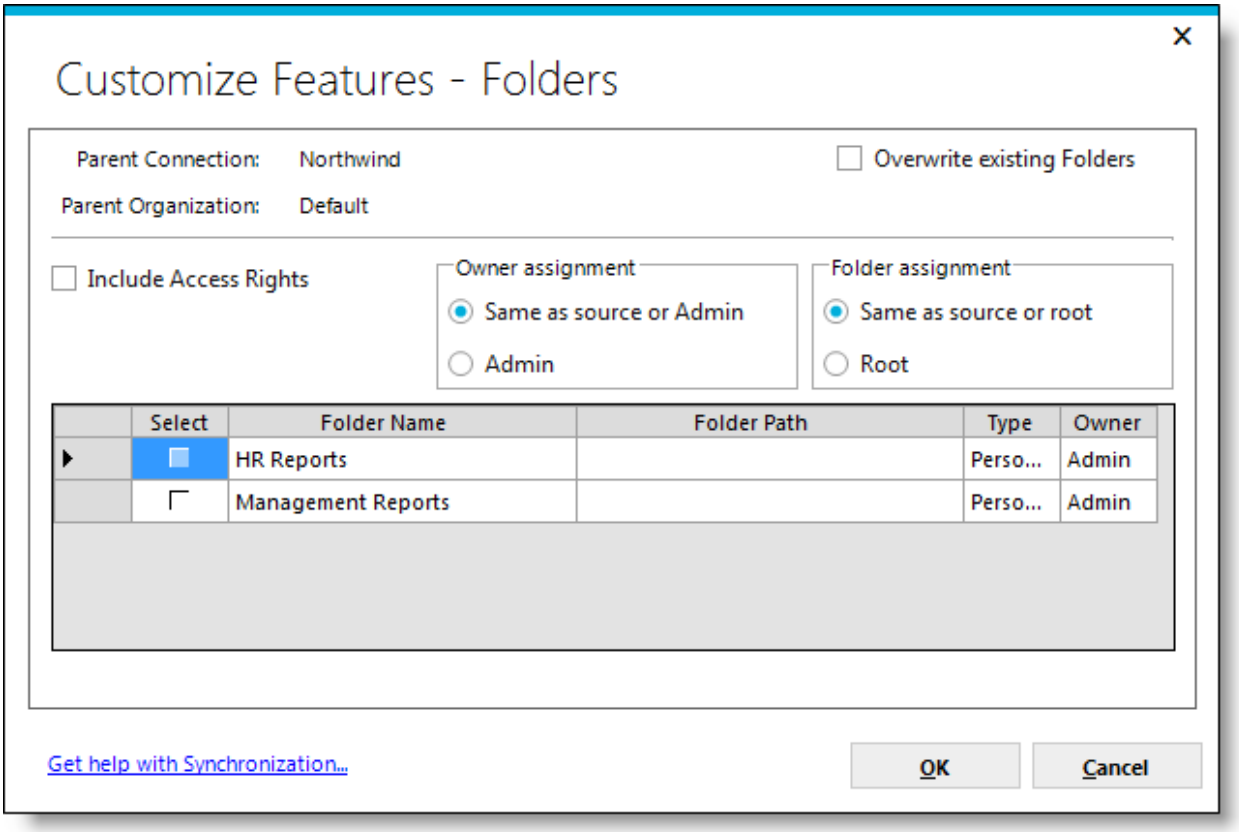
Click the ? icon to see additional information regarding the associated option.

Click **OK** to temporarily save the selected cascading filters in the synchronization package.

Content Items

Folders – Checking the checkbox will direct that all folder information be added to the synchronization package and, when applied, folders will be added to the target instance, if they do not already exist. In addition, all of the associated reports will be selected and included in the synchronization package.

Clicking the Folders link will display the following dialog box:



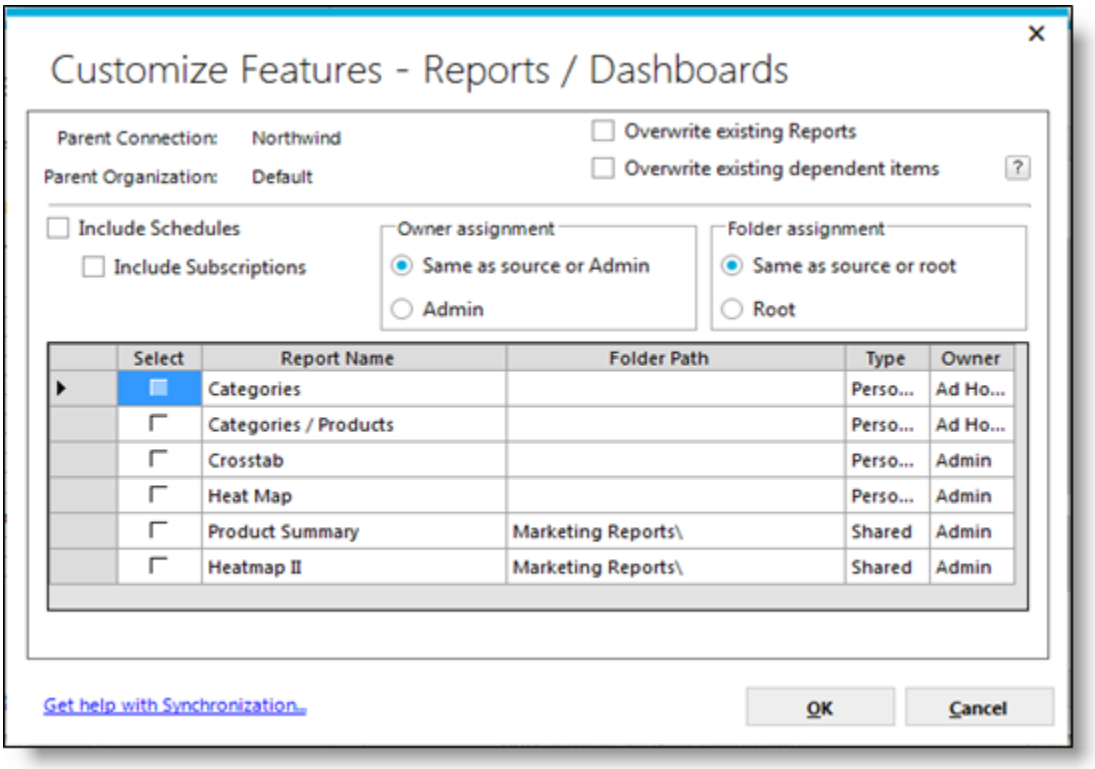
Individual folders can be selected by checking the associated checkbox. All folders can be toggled at once by clicking the **Select** column header. The default behavior is to add missing folders in the target instance. Check the **Overwrite existing folders** checkbox to replicate the folders in the target instance.

Folders may have associated access rights. Check **Include Access Rights** to replicate the access rights in the target instance. The **Owner Assignment** frame indicates that the owner should be retained in the target if possible or set to "Admin". The **Folder Assignment** frame indicates that the parent/child relationships between folders should be retained if possible or created in the root area.

Click **OK** to temporarily save the selected folders in the synchronization package.

Reports – Checking the checkbox will direct that all report information be added to the synchronization package and, when applied, reports will be added to the target instance, if they do not already exist. By default, the report owner and folder structure will be maintained, if possible.

Clicking on the Reports link will display the following dialog box:



Individual reports can be selected by checking the associated checkbox. All reports can be toggled at once by clicking the **Select** column header. The default behavior is to add missing reports in the target instance. Check the **Overwrite existing reports** checkbox to replicate the reports in the target instance.

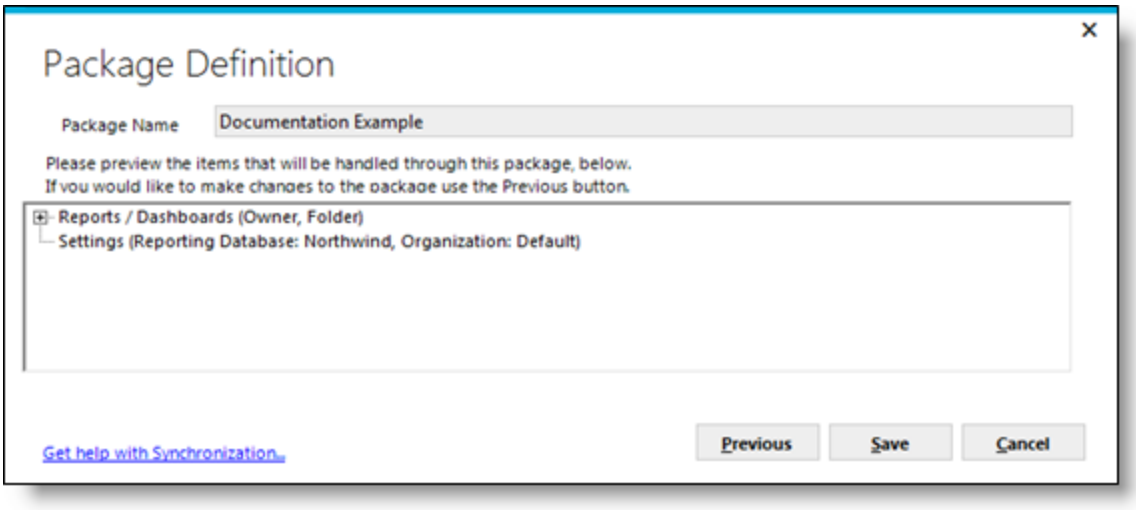
Reports have direct dependencies such as data objects, columns, formats and presentation styles. Check **Overwrite existing dependent items** to replicate the dependencies in the target instance.

Schedules and subscription information related to the selected reports may be included in the synchronization package by checking **Include Schedules** and **Include Subscriptions,** respectively.

The **Owner Assignment** frame indicates that the owner should be retained in the target if possible or set to "Admin". The **Folder Assignment** frame indicates that the folders should be retained if possible or create the reports in the root area. Click **OK** to temporarily save the selected reports in the synchronization package.

Package Definition - Preview

After selecting all of the items to be synchronized between the source instance and the target instance, the synchronization creation wizard will present the **Package Definition - Preview** dialog box. This dialog box identifies the synchronization package and presents an outline of the items included the package. Here's an example:



This provides an opportunity to review the synchronization package contents to ensure that the content and options are accurate for the intended purpose of the instance synchronization.

Each item presented may have subordinate items that have been included in the package. These can be reviewed by expanding the tree and processing options are shown within parenthesis. In the above example, the **Data Objects** and **Reports** were selected from the *Simple View*. None of the default processing characteristics were modified.

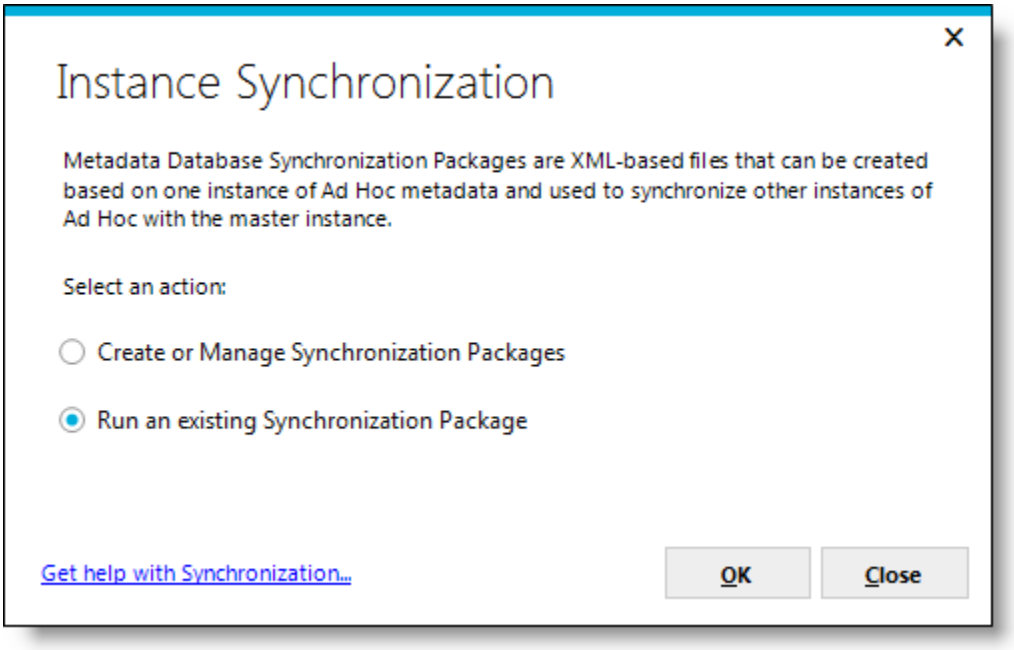
The "Settings" item identifies the reporting database connection and organization that was used as the source for the synchronization package. The source instance for the synchronization package is the active instance in the Management Console at the time the package is created.

Click **Previous** to return to the Package Definition dialog boxes.

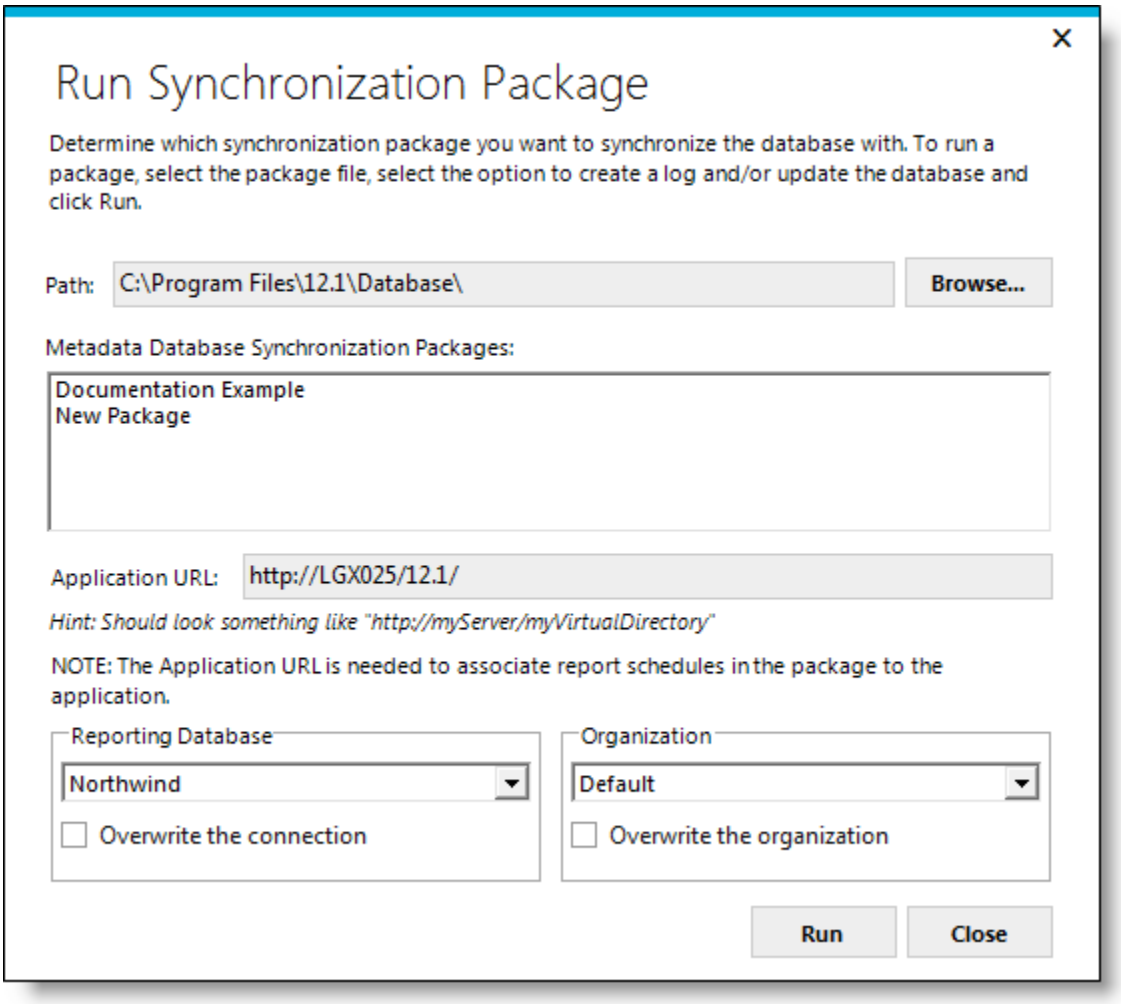
Click **Save** to create the synchronization package file with the current selected items and return to the Manage Synchronization Package dialog box.

Applying a Synchronization Package to a Target Instance

To apply a synchronization package to the currently active instance and the active connection, click **Tools** and then **Synchronization**. The following **Instance Synchronization** dialog box will be displayed:



Select the *Run an existing Synchronization Package* option and click **OK**. The **Run Metadata Database Synchronization Package** dialog box will be displayed:



The **Run Metadata Database Synchronization Package** dialog box displays a list of synchronization package files residing in the designated **Path**. Initially the list of files is populated from the `Database` folder of the currently active instance. Click **Browse** to search in other locations for synchronization packages.

The **Application URL** defaults to the URL of the active instance and is used to adjust report schedule information during the synchronization process. If the highlighted synchronization package contains report schedules, the **Application URL** must be specified. Initially this is populated with the URL of the active instance; however, this may need to be adjusted for different configurations. If there are no report schedules in the synchronization package, the **Application URL** attribute is not displayed.

The **Reporting Database** defaults to the currently active connection in the target instance. This can be overridden by selecting a different reporting database from the list. Check **Overwrite the connection** if the target connection information needs to be adjusted.

The **Organization** defaults to the first organization in the list. Select the appropriate target organization for the synchronization process. Check **Overwrite the organization** if the organization information in the target needs to be reset to the organization information included in the synchronization package.

To apply a synchronization package:

1) Highlight the synchronization package to be applied.
2) Verify that the reporting database and organization are correct.
3) Click **Run**.

A log of the results is generated and can be reviewed in the **Update Results** dialog box. The Update Results dialog box can be dismissed by clicking **Close**. The log is also stored in the `/Log` folder of the target instance.

Click **Close** to dismiss the Run Synchronization Package dialog box.

Note:

If the synchronization package contains a report with an Expiration Date less than the current date/time (e.g., now), then the report will not be uploaded and shall be identified as having failed to load with an applicable reason.

Hint:

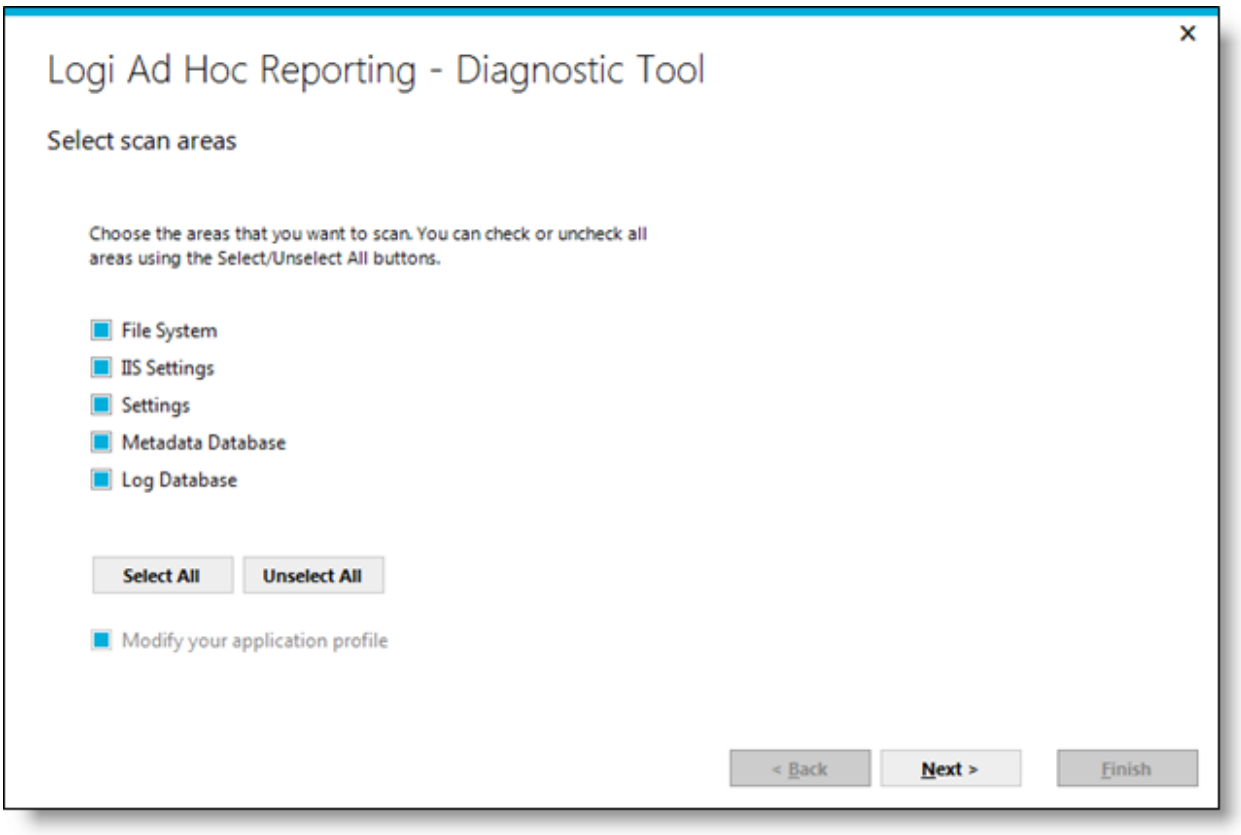
Synchronization packages may be run from the Command line. Please contact Support@LogiAnalytics.com for instructions for this process.

Diagnostic Scan

The Management Console provides an important tool that can assist in diagnosing instance configuration issues. The Diagnostic Scan is a wizard that:

- Allows the System Administrator select the configuration areas to scan.
- Collects general information from the System Administrator about the instance.
- Generates a report of the findings.
- Allows the scan report to be sent to an email recipient.

Click the **Tools** action group and then the **Diagnostic** action to display the following dialog box:



By default, the diagnostic scan will review the following configuration areas:

- *File System* – Looks for the expected folders and files.

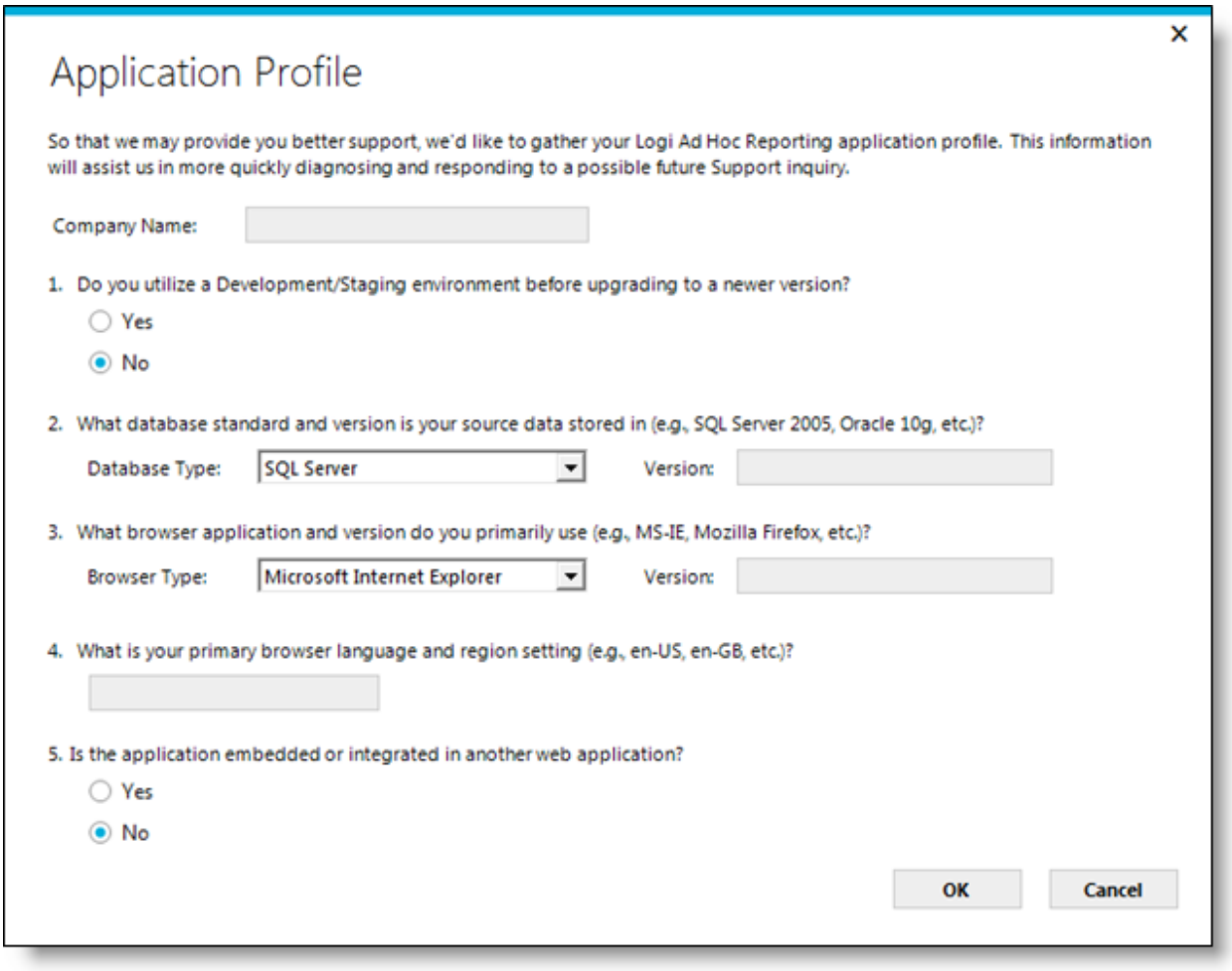
- *IIS settings* – Verifies the URL, application pools and other IIS information.
- *Settings* – Displays key attributes from the `_Definitions/_Settings.lgx` file.
- *Metadata Database* – Verifies the connection and examines the metadata database structure and content.
- *Log Database* – Verifies the connection and structure of the event logging database.

Click **Select All** or **Unselect All** to enable or disable all of the scan options, respectively. Only the enabled configuration areas will be scanned.

Java -
The IIS option will not be enabled.

The **Diagnostic** wizard collects additional information about the configuration as part of the process that must be entered manually. This collection of information is called the *Application Profile* and must be entered the first time the **Diagnostic** wizard is run on an instance.

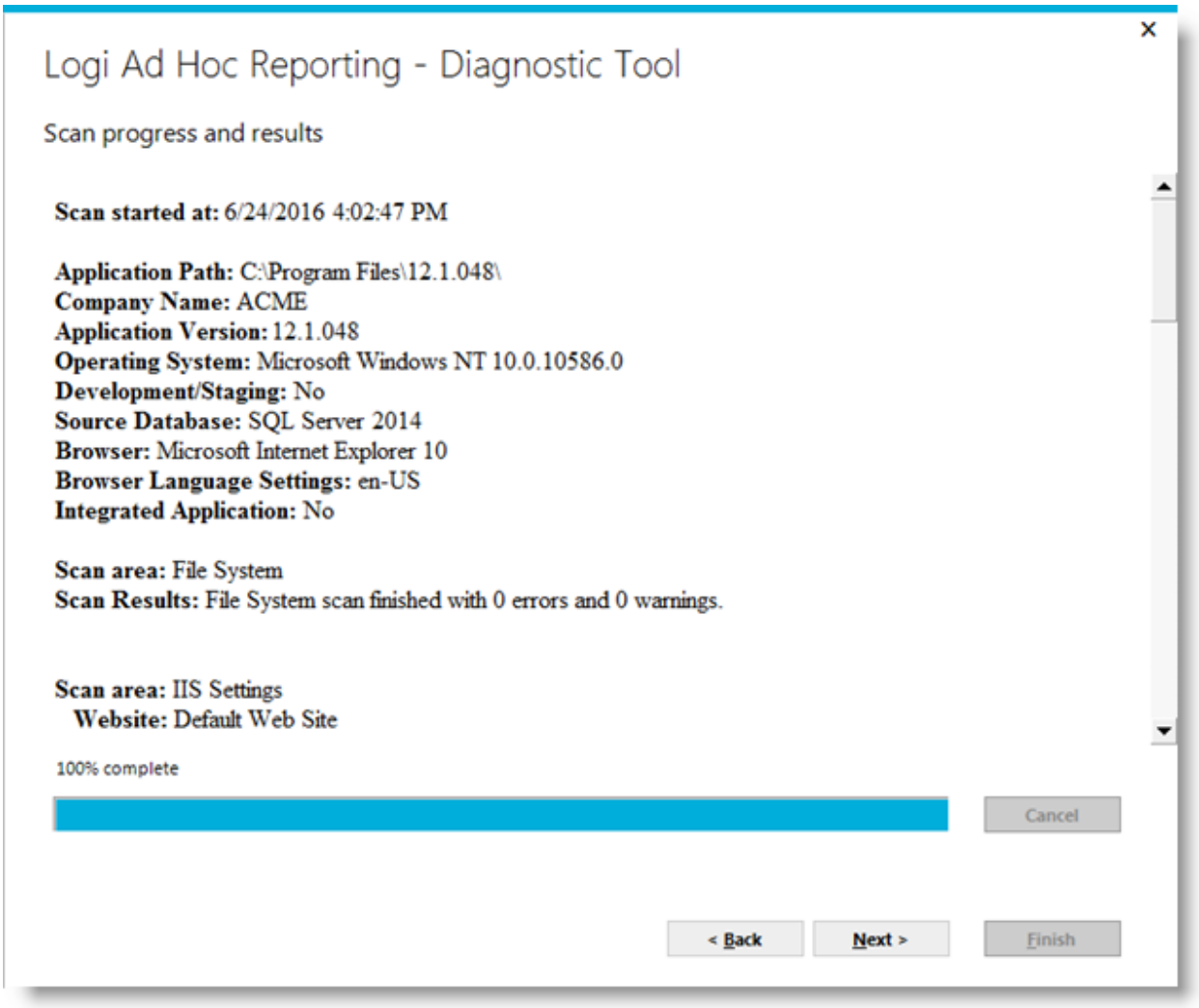
Click **Next** to display the **Application Profile** dialog box:



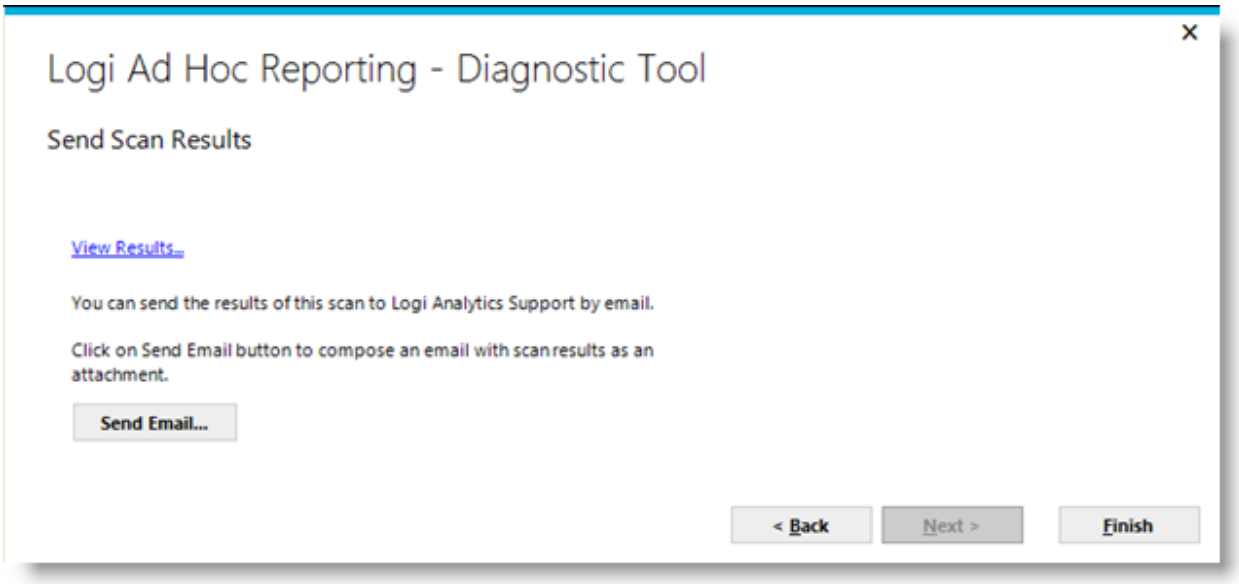
Enter the requested information and click **OK**.

If the information has already been provided for an instance, this dialog box may be skipped by unchecking the *Modify your application profile* checkbox in the initial **Diagnostic** wizard dialog box.

The scan results are displayed in the **Scan progress and results** dialog box, similar to the following:



After reviewing the results, click **Next** to display the final **Send Scan Results** dialog box.



This dialog box provides the opportunity to send the scan report to an email recipient, typically to Support@LogiAnalytics.com.

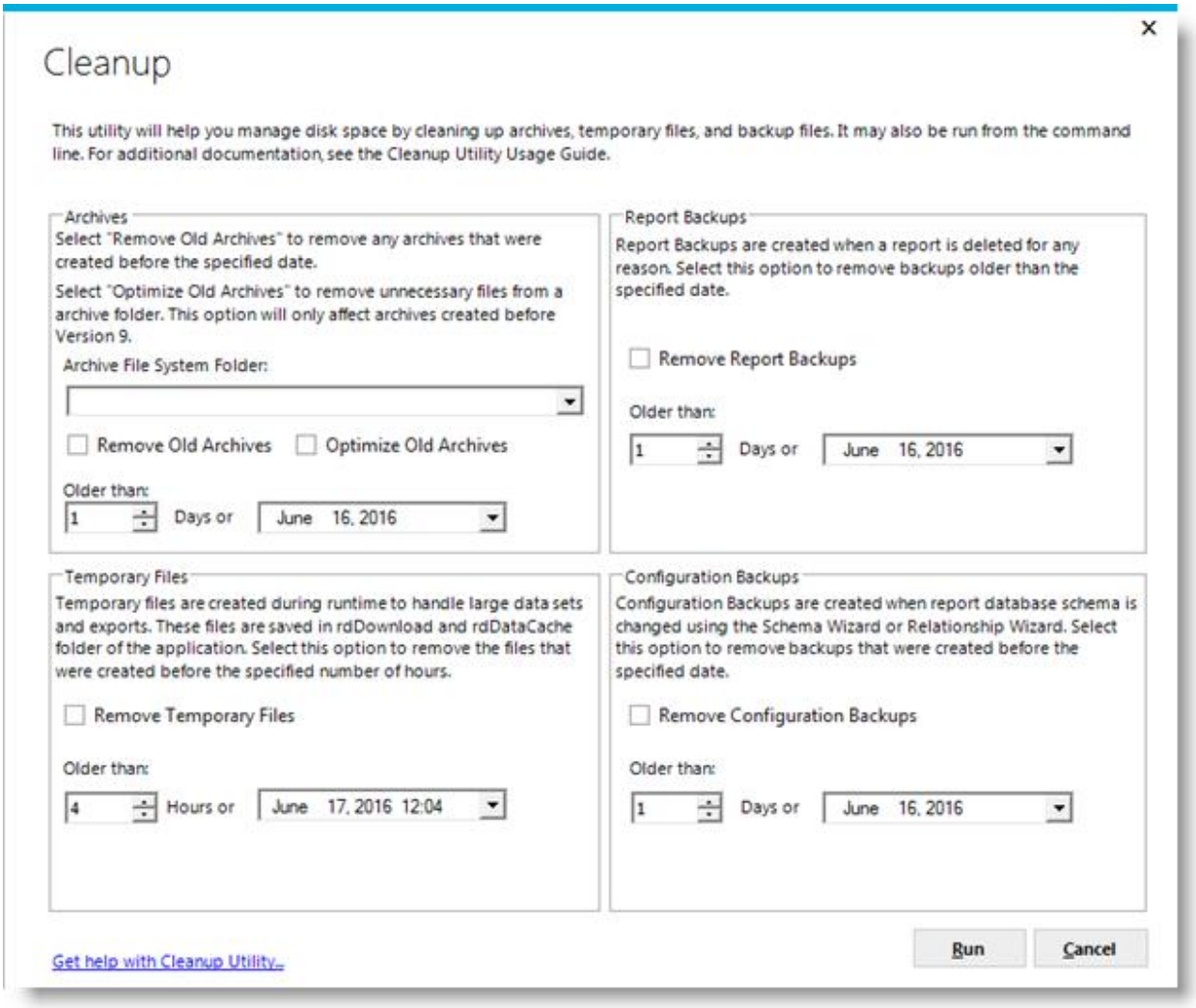
The scan results are stored in an HTML file in the *Log/Diagnostic Tool* folder.

Cleanup

In the course of using Ad Hoc, files are created on the server. If *Archiving* is enabled, the archive folder will grow as reports are added. In addition, backups of the report definitions and metadata configuration are periodically taken and cache and temporary export files are created.

The **Cleanup** utility allows the System Administrator to manage all of these files and folders.

To run the **Cleanup** utility, click the **Tools** action group and then the **Cleanup** action. The following dialog box will be displayed:



The dialog box is divided into panels for four categories of files:

- *Archives* – A folder containing archived reports.
- *Temporary Files* – Two folders containing cached and export related files.
- *Report Backups* – Copies of deleted report definitions.
- *Configuration Backups* – Snapshots of the configuration prior to making schema or relationship changes.

Each panel contains an "enabling" checkbox indicating that the area should be cleaned-up per the associated parameters when **Run** is clicked.

The *Archives* panel also contains an *Optimize Old Archives* option. For archives created prior to Version 9 there may be unnecessary files stored in the archive, depending on the archive format. Checking this will cause the extraneous files to be removed when the utility is run.

Note:

The cleanup functions may also be run from the command line. This implies that the functions may be scheduled to run periodically. For additional documentation on the **Cleanup** utility, click here or visit www.LogiAnalytics.com/devnet and review the documentation area.

Internationalization

In the case of Logi Ad Hoc Reporting, "internationalized" means that the application can work in any language into which its resources have been translated. Logi Ad Hoc Reporting resources are all text strings, including tooltips and messages that have been used in the application. These resource text strings are stored in external files, called resource files.

The default resource files are in the application's original language, in this case English. In order to enable users of other languages to work with the application in their native language, translated copies of the original resource files have to be created and stored alongside the original resource files.

When the Logi Ad Hoc Reporting application is internationalized, the application attempts to locate a resource file that matches the browser's language setting based on a specific resource file naming convention. If the appropriate resource is found, it will be used, otherwise the default will be used.

Java -
Internationalization is not an available action.

Resource files must conform to a certain naming convention in order to be useable by Logi Ad Hoc Reporting as noted below:

```
*.[language code].resx
```

Where:

- The `asterisk (*)` is the standard Logi Ad Hoc Reporting resource file name (e.g., `ReportWizard10.aspx`).
- The `[language code]` is actually an ISO Language-Region string that consists of an alpha-2 language reference code and another optional alpha-2 code representing a regional variation of the specified language. For example, `en-au` is the code for English - Australia and `en-us` for English - United States.
- The `resx` is the standard Logi Ad Hoc Reporting file extension for resource files.

Note:
The original and internationalized resource files are stored in the application's `App_GlobalResources` and `App_LocalResources` folders and in `App_LocalResources` subfolders found in other folders in the application.

In the course of translating your resource files you have to decide which region or regions you want to cover. For example if you are translating the resource files into Italian, you have to decide whether you are going to support only standard Italian or also the Italian spoken in Switzerland. If both are going to be supported, you need to first create the standard versions (ISO code: `it`). Then create a copy of those and rename them to `it-ch` (code for Italian - Switzerland) and revise the translated values to accommodate the differences.

Selection of the appropriate resource files by the system happens in a hierarchical manner. The system will first try to locate the resource file with the exact language-region code (i.e., `it-ch`) specified by your browser. If that cannot be found, then it resorts to resources with just the language code (i.e., `it`). If that is not found either, it will fall back on the default resources, which are in English.

Consider a scenario where you have two sets of resource files with `es` (for standard Spanish) and `es-mx` (for Spanish - Mexico) extensions. A user with an `es-mx` browser language setting will get the `es-mx` resources. Another user with `es-ar` (Spanish - Argentina) browser language setting will get the standard `es` resources, because `es-ar` resources do not exist and the hierarchical selection will pick the immediate choice above (e.g., `es`). On the other hand, another user with `fr-be` (French - Belgium) browser language setting, will simply get the default English resources as no resources in the French hierarchy exist.

Note:
A list of available ISO language-region codes for MS-Windows can be found in Internet Explorer's **Tools > Internet Options > Languages** menu option. Click **Add** to see the list of available languages and their codes.

Overview of the Resource Manager

The **Resource Manager** serves two general purposes; to manage groups of language-specific resource files and to provide a convenient method to translate the text strings.

There are many resource files associated with internationalizing Ad Hoc. They are handled by the Management Console as a language-specific block of files. When resource files are published or imported, all of the files sharing the same language extension are handled together.

The Management Console is the central configuration application for all Ad Hoc instances. Initially a suite of "default" resource files is included in the Management Console and serve as the basis for all of the language-specific files. In the Management Console, the resource files are bundled under the `ahResources` folder.

Note:
The Management Console is the central repository of files used to create or update instances of Ad Hoc. If language-specific resource files exist in the Management Console `ahResources` folder, the user will be given the option to replicate the resource files for a new instance or upgrade of an existing instance.

The initial dialog box of the **Resource Manager** provides four options:

- Create or manage central resource files

  This option allows the administrator to create or review/edit language-specific resource files in the Management Console. These files will reside in the `ahResources` folder. Selection of a new *Language Code* will automatically create the resource files in the Management Console using the default (English) resource files as a basis. Selection of an existing *Language Code* from the dropdown list will allow the administrator to review and edit the specified resource files.

- Create or manage resource files for the active instance

  This option allows the administrator to create and review/edit language-specific resource files directly in an Ad Hoc instance. For resource to be effective in the localization of an Ad Hoc instance, the resource files must reside in the proper locations with an Ad Hoc instance. Selection of a new *Language Code* will automatically create the resource files in the active Ad Hoc instance using the default (English) resource files as a basis. Selection of an existing

Language Code from the dropdown list will allow the administrator to review and edit the specified resource files residing in the active Ad Hoc instance.

- Publish central resources into an instance

  This option copies the selected language-specific resource files from the Management Console to the proper folders in the specified Ad Hoc instance.

- Import resources from an instance

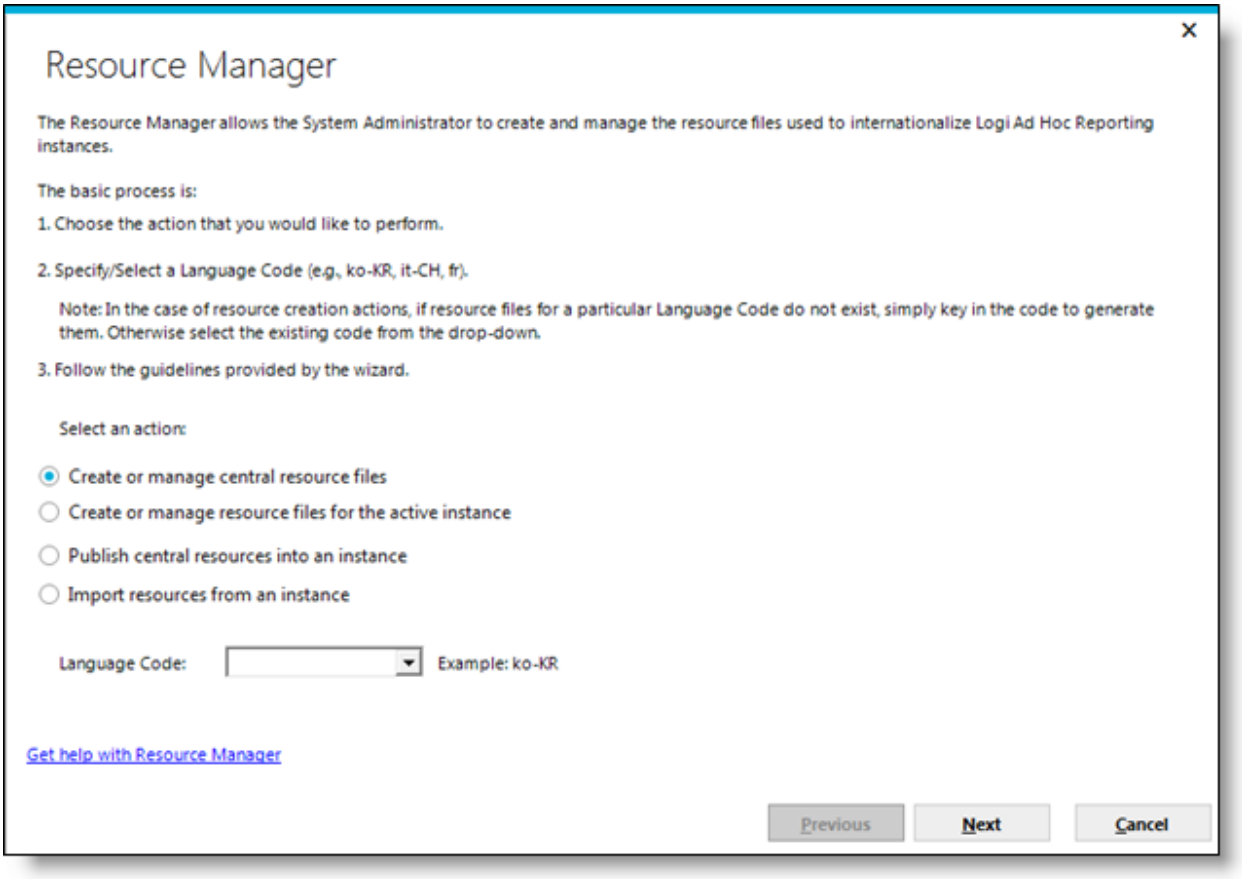
  This option copies the selected language-specific resource files from the specified Ad Hoc instance into the Management Console.

A typical scenario for creating language-specific resource files and localizing an Ad Hoc instance is:

1) Create an Ad Hoc instance specifically used to verify the language translations.
2) Create language-specific resource files in that target Ad Hoc instance.
3) Use the **Resource Manager** to translate the text strings into the language.
4) Use the Ad Hoc instance to review the impact of the translations. Set the browser language to the proper language-region code to perform the translation review.
5) When the translations have been completed, reviewed and accepted, *Import* the resource files back into the Management Console so that the files are available for publishing to other Ad Hoc instances.

Using the Resource Manager

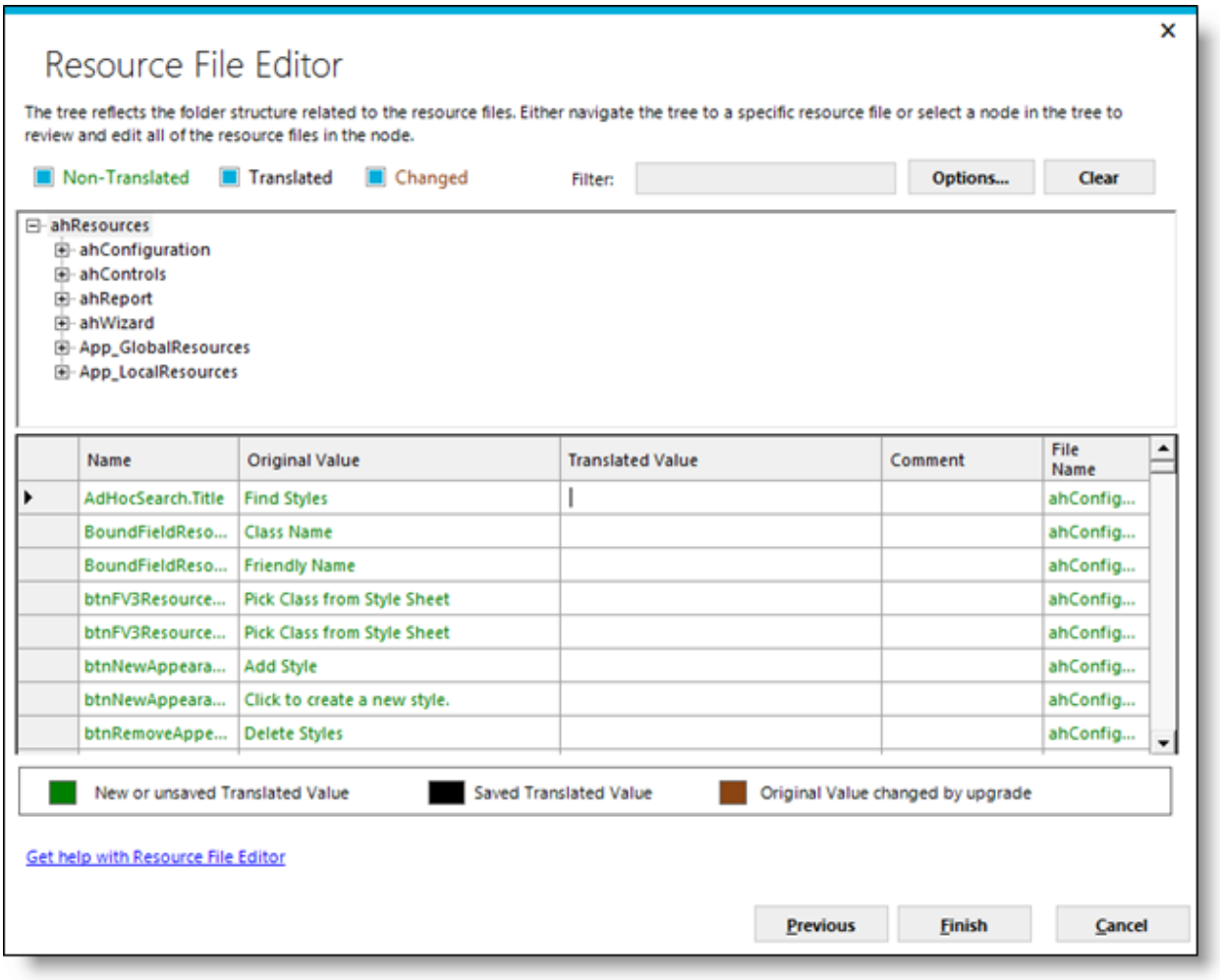
The Resource Manager dialog boxes are accessed by clicking on the *Tools* action group and the *Internationalization* action. The following dialog box will be displayed:



Select an action and then either select or enter a *Language Code* and click **Next**.

Create or manage central resource files option

If this option is selected and the *Language Code* is new, the resource files are created in the appropriate folders in the Management Console under the `ahResources` folder and the **Resource File Editor** dialog box is displayed. If an existing *Language Code* is selected, the existing language-specific resource files are displayed in the Resource File Editor dialog box:



The tree structure in the top panel is based on the folder location in which the resource files are stored.

Locating the desired resource file:

1. From the **Resource File Editor** window, navigate to the desired resource file by expanding the branches of the tree structure.
2. Click desired resource file name to load the *Translated Value* grid.

Notes:
Resources are displayed in a hierarchical manner. For example, if you are at the highest level (root level) of the application, you see all of the resources. The deeper in the hierarchy you navigate, the smaller the scope gets.

New resource files and resources that have not been translated will display in green. Already translated content will be displayed in black. Changed resources will display in brown.

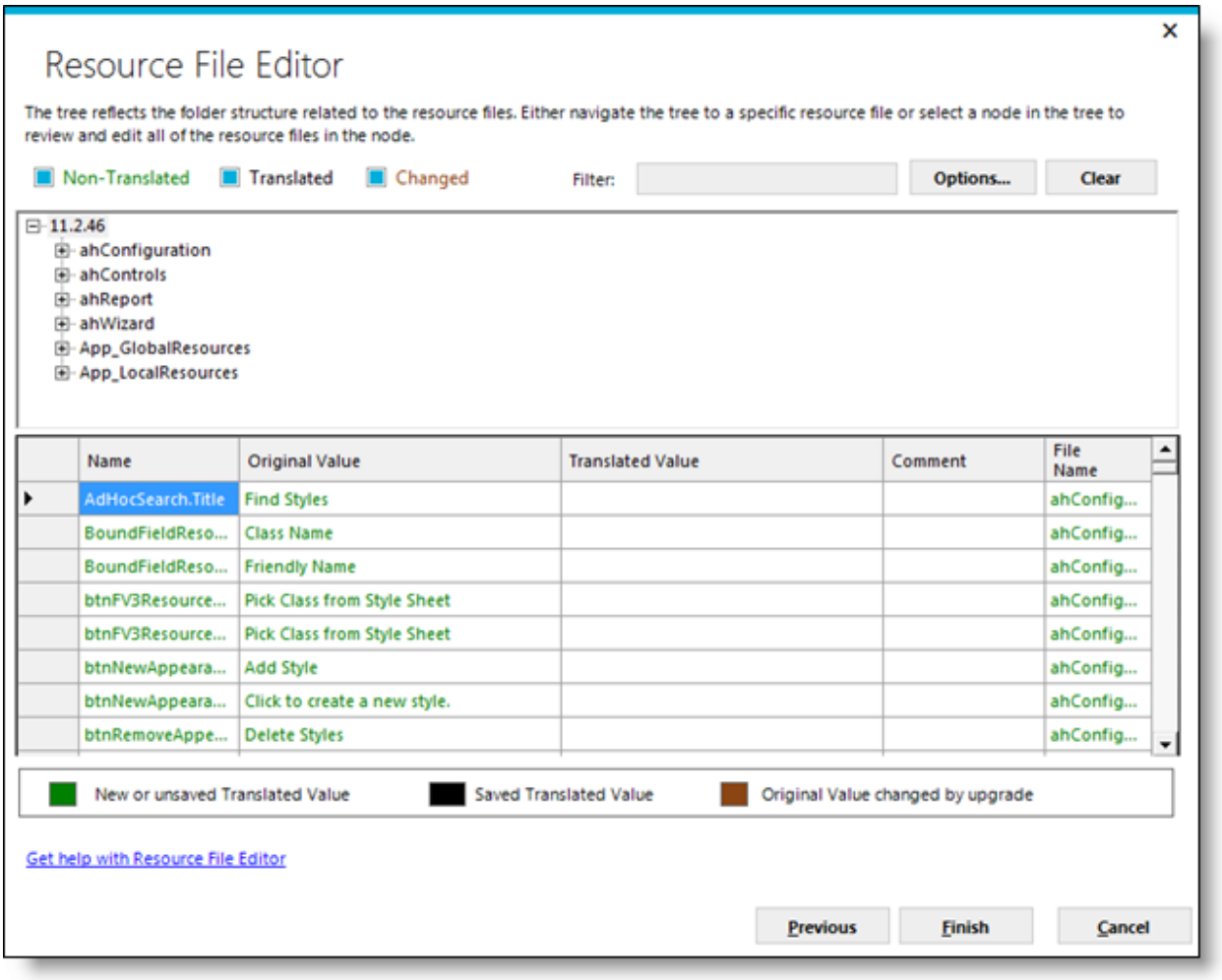
Specifying a Translated Value:

3. From the *Translated Value* grid, specify the desired ***Translated Value(s)*** with regard to the associated ***Original Value***.
4. Repeat the process until all of the *Original Values* have *Translated Values* for all of the resource files.
5. Click **Finish** to save the resource files.

Additional details regarding using the **Resource File Editor** are found below.

Create or manage resource files for the active instance option

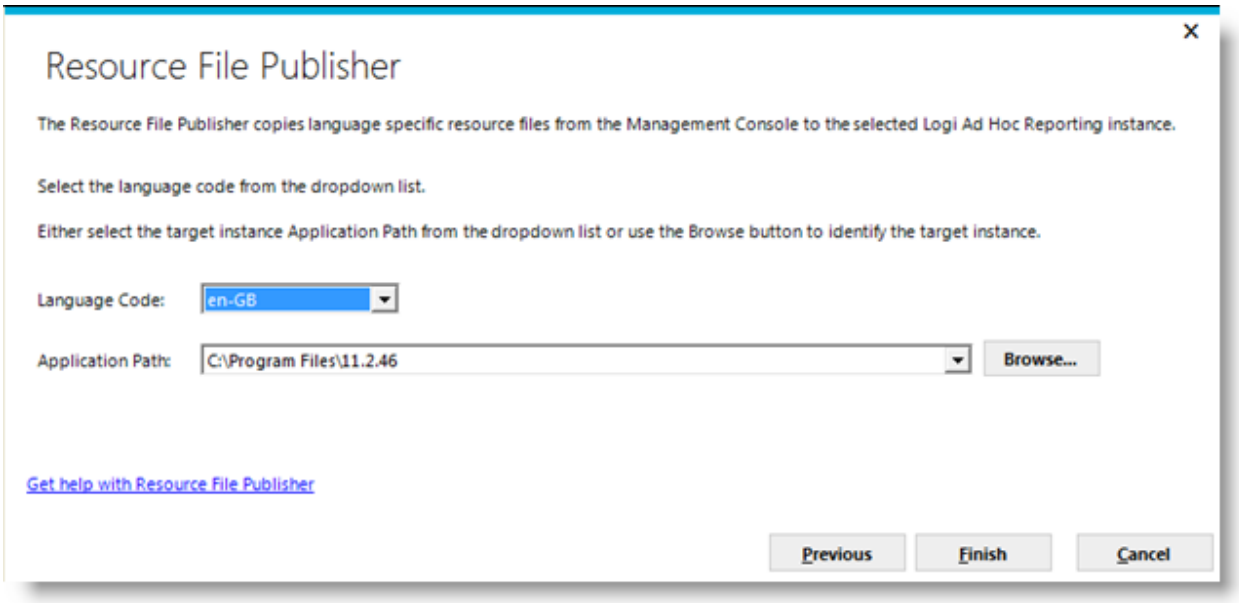
If this option is selected and the *Language Code* is new, the resource files are created in the appropriate folders in the active Ad Hoc instance under the instance root folder and the **Resource File Editor** dialog box is displayed. If an existing *Language Code* is selected, the existing language-specific resource files are displayed in the **Resource File Editor** dialog box.



The **Resource File Editor** dialog box content is identical in this option to the previous option except that the top tree node reflects the Ad Hoc instance root folder. The dialog box is used identically to that discussed in the previous section.

Publish central resources into an instance option

This option allows the administrator to copy language-specific resource files from the Management Console to the appropriate locations in a selected Ad Hoc instance. If this option is selected, the **Resource File Publisher** dialog box is displayed.



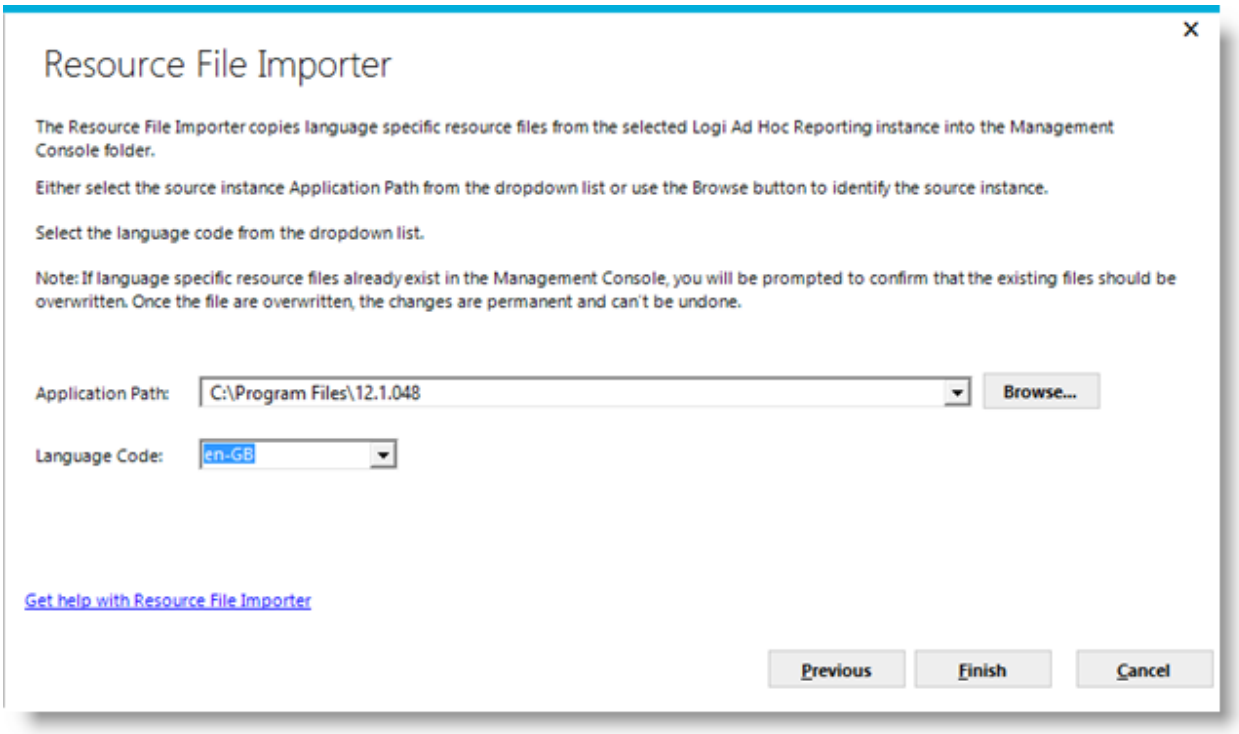
Select the *Language Code* from the dropdown list.

Select the root folder of the destination Ad Hoc instance by either picking one from the *Application Path* dropdown list or using **Browse** to locate the instance.

Click **Finish** to copy the files. If the language-specific files already exist, an overwrite confirmation prompt will be issued.

Import resources from an instance option

This option allows the administrator to copy language-specific resource files from the selected Ad Hoc instance to the appropriate locations in the Management Console. If this option is selected, the **Resource File Importer** dialog box is displayed.



Select the root folder of the source Ad Hoc instance by either picking one from the *Application Path* drop-down list or using **Browse** to locate the instance.

Select the *Language Code* from the dropdown list.

Click **Finish** to copy the files. If the language-specific files already exist, an overwrite confirmation prompt will be issued.

Working with "Tokens" in a Phrase:

Each language may have a different sentence structure that can sometimes affect the process of internationalization. This happens when certain parts of a sentence are constructed dynamically. For example, the English phrase:

```
Access Rights for "sales" table
```

This phrase could be displayed as the title for the Object Permissions web page in Logi Ad Hoc Reporting. The name in quotes (sales) is the name of a data object and is added to the phrase in a dynamic manner. So when the "orders" table is selected, "orders" will be displayed in the phrase instead

of "sales". So the phrase is actually *broken* into two pieces in the resource file and dynamic part appears in the form of a placeholder that will later be replaced in the application, at runtime:

```
Access Rights for "@Replace1~" table
```

The same phrase, when translated to Italian, has a different sentence structure and the table name appears at the end:

```
Diritti d'accesso per tabella "vendite"
```

So you have to be careful to use the same placeholder in the right position, where the dynamic content should go:

```
Diritti d'accesso per tabella "@Replace1~"
```

You may encounter more than one placeholder in a phrase. In this case they will be named:

`@Replace1~` or `@Replace2~`, etc.

Again, these placeholders are going to be replaced with appropriate, dynamic values at runtime and should therefore be present, in their original, English form, in their right places in the translated text.

What to expect when Logi Ad Hoc Reporting is upgraded:

New features and functionalities are added to each version of Logi Ad Hoc Reporting and occasional changes may be made to certain pages. These additions and changes may require new phrases or changes to existing phrases in the original English resource files. Therefore, it is imperative that the Resource Manager utility be executed against the upgraded application to determine which original values were changed or added. This exercise must be performed against each existing language resource file set.

New phrases will be displayed in **green** and changes will be displayed in **brown**. Review all resources. As applicable, make appropriate changes and then click **Finish** to save the resource file.

If translated value still holds, despite the change in the original value, you can "accept" the translation by right clicking on the selection column of the grid (left-most column in gray) and choose "Accept Translation". Once a translation has been accepted, it will no longer show in brown (unless it is changed again in a future upgrade).

Multiple rows of the grid can be selected and copied or accepted at once, by holding down Shift (for continuous selection) or Ctrl key (for separate selection).

One or multiple rows or columns of the grid can be selected and copied (right-click) into clipboard if needed. This feature can be used to transfer the phrases to Excel or any other tool for bulk translation.

A column, or any text copied from an Excel file can be pasted back into the Translated Value column. If the number of copied cells is more than selected cells for pasting, pasting will continue until all the cells in the clipboard are pasted into the column.

If the number of copied cells is less than selected cells for pasting, they will repeat until selected area has been exhausted.

Note:
Some familiar keyboard combinations work in Resource Manager. These are:

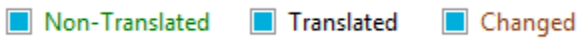
Ctrl + c: Copy

Ctrl + v: Paste

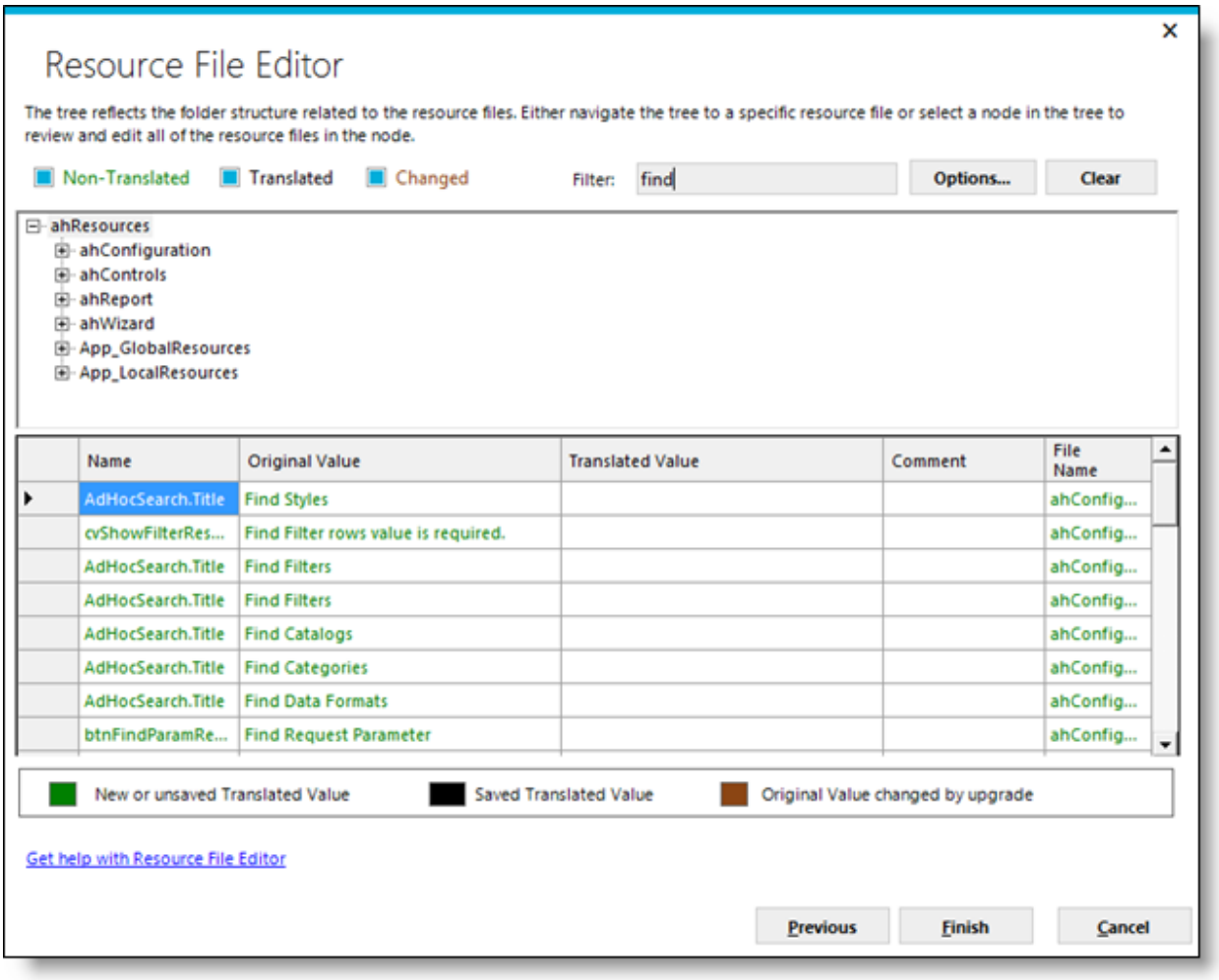
Ctrl + z: Undo of the last action

Filtering Resources

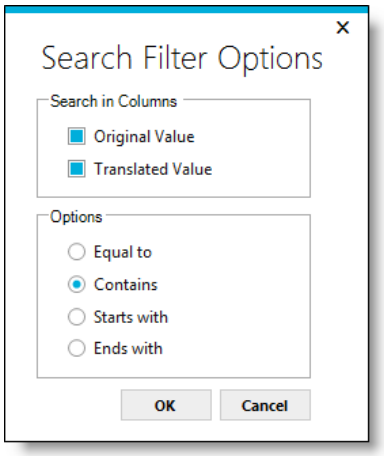
Resources can be filtered for maximum efficiency. When the Resource File Editor starts, all resources are displayed by default. Non-translated, translated, or changed phrases can be filtered out of view by un-checking the respective checkboxes on top of the screen:



Another option for narrowing down the resources is filtering them by a certain text. In the following figure, only resources that contain the word “find” and are located inside of `ahReport` folder are displayed.



Filtering options can be changed from their defaults by clicking **Options** or the filter value can be cleared by clicking **Clear**.

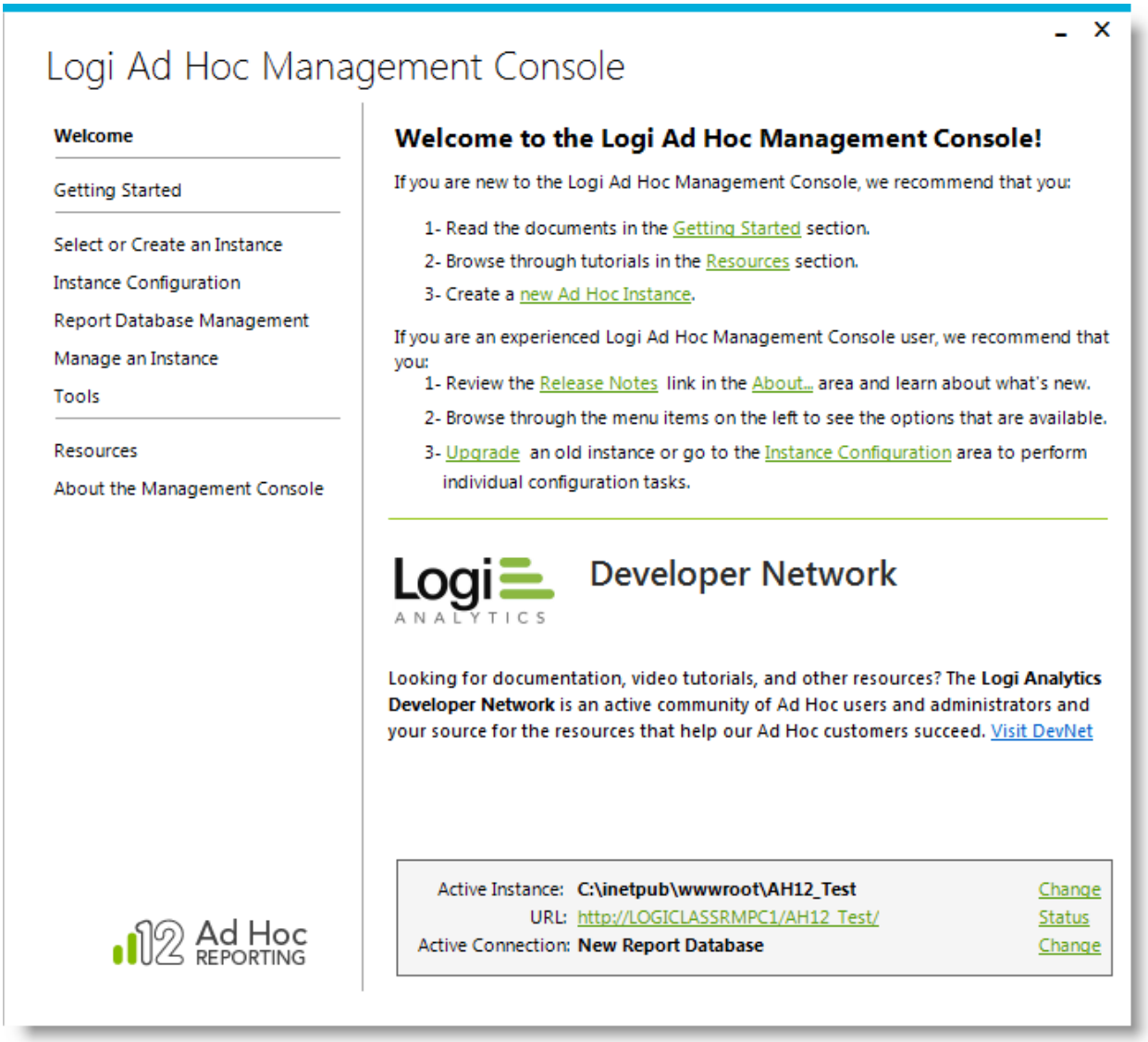


Additional Resources

Welcome Page

When the Management Console is initially launched, the first dialog box displayed is the Welcome page. It is intended to provide guidance for new users of the Management Console and for experienced System Administrators that are using this version of the Management Console for the first time.

This page may be revisited by click Welcome action group.



For new users, typically the first step is to become familiar with the product with the goal of creating an instance of Ad Hoc. We recommend that the documentation be reviewed and tutorials studied prior to creating a first instance. Links are displayed to guide the new user to the appropriate areas.

For experienced users, typically the first step is to review the differences between the version they are familiar with and the current version by examining the Release Notes. If the Management Console interface is unfamiliar, time should be taken to navigate the user interface and locate the functions they are used to. Generally, the final step is to upgrade an existing instance of Ad Hoc. Links are provided to assist the experienced user with these tasks.

Notes:

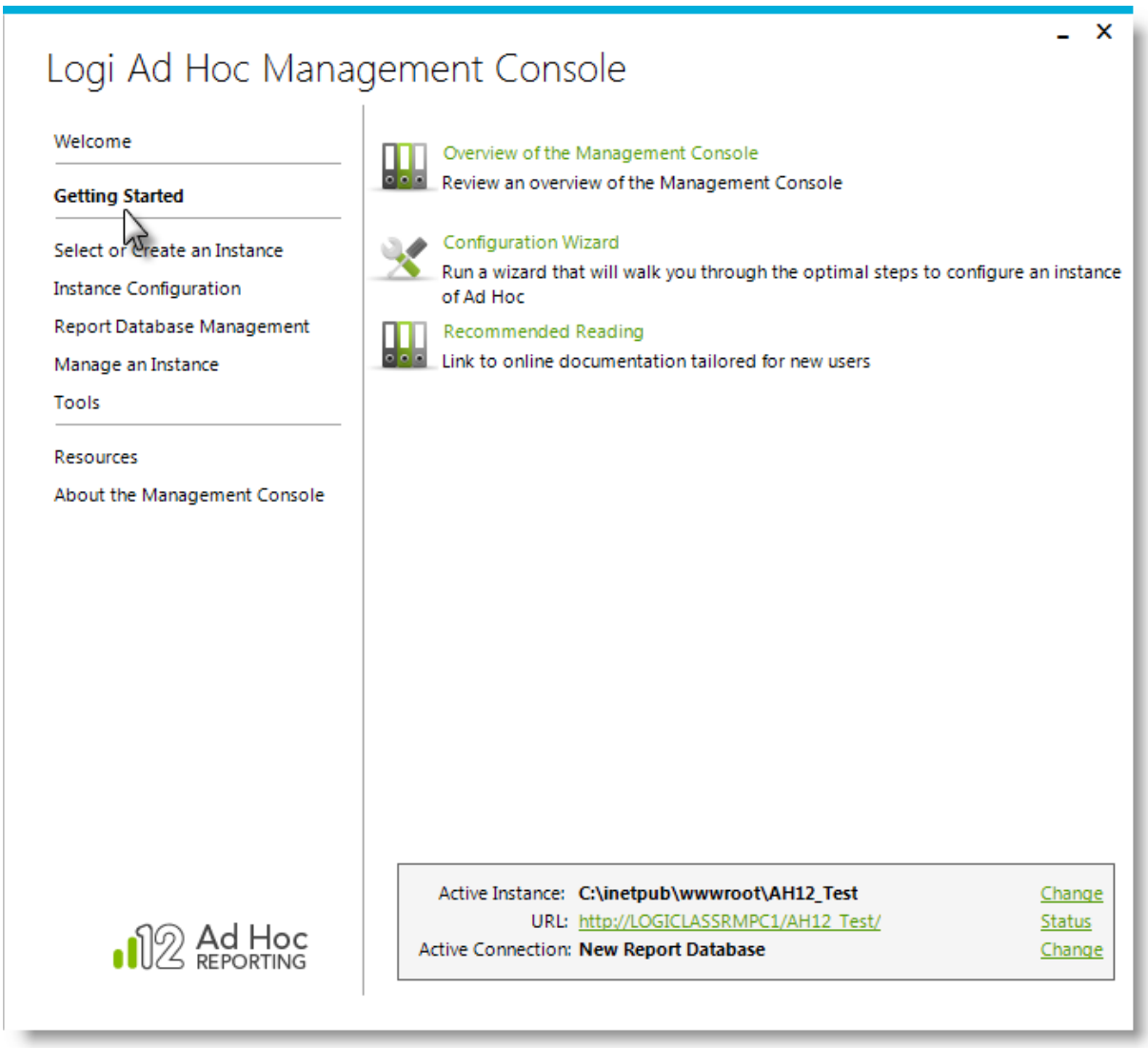
The links displayed on the Welcome page are simply shortcuts to action groups and actions available in the Management Console. Each option may also be accessed by navigating through the action groups and actions.

When there is no active instance, the target panel will not be displayed. This would be the case when the Management Console is launched for the first time

Getting Started

The Getting Started action group is specifically tailored to help users new to the Management Console. It is strongly recommended, as the actions indicate, that the new user becomes familiar with the features and functions of the Management Console and where the resources are that may assist in the creation and configuration of an Ad Hoc instance.

Clicking the **Getting Started** action group will display the following page:



Overview of the Management Console – Opens a brief guide to the MC designed for the new user and as a quick reference.

Brief Management Console Tutorial – Demonstrates the basic MC navigation and show the expected usage of the Configuration Wizard.

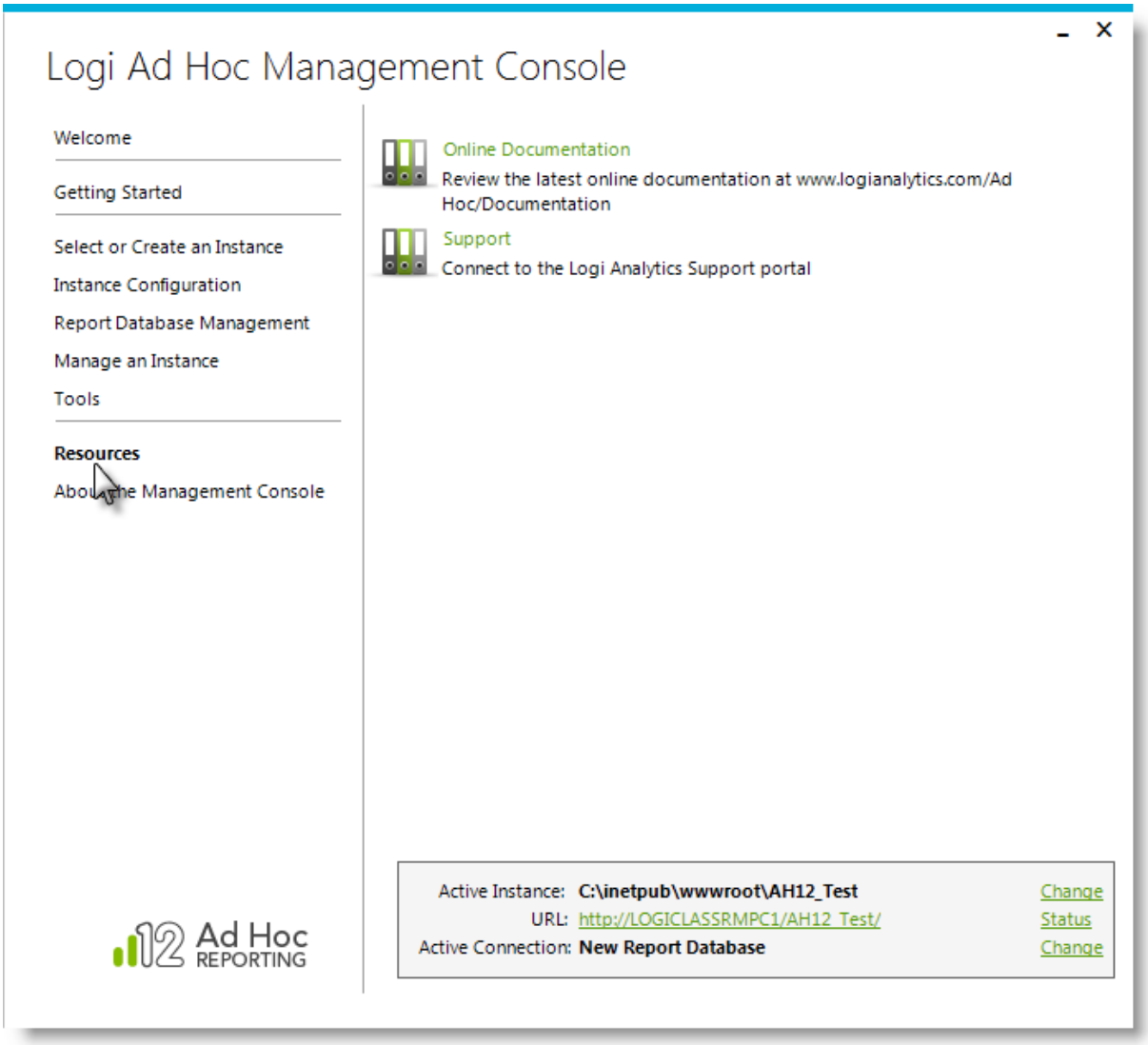
Configuration Wizard – Launches a wizard that walks you through the steps necessary to create and configure an Ad Hoc instance.

Recommended Reading – A link to the online “Getting Started with Ad Hoc” documentation section on the Logi Analytics web site

Resources

The Resource action group provides links to online documentation and tutorials. It also provides a quick link to the Logi Analytics Support portal.

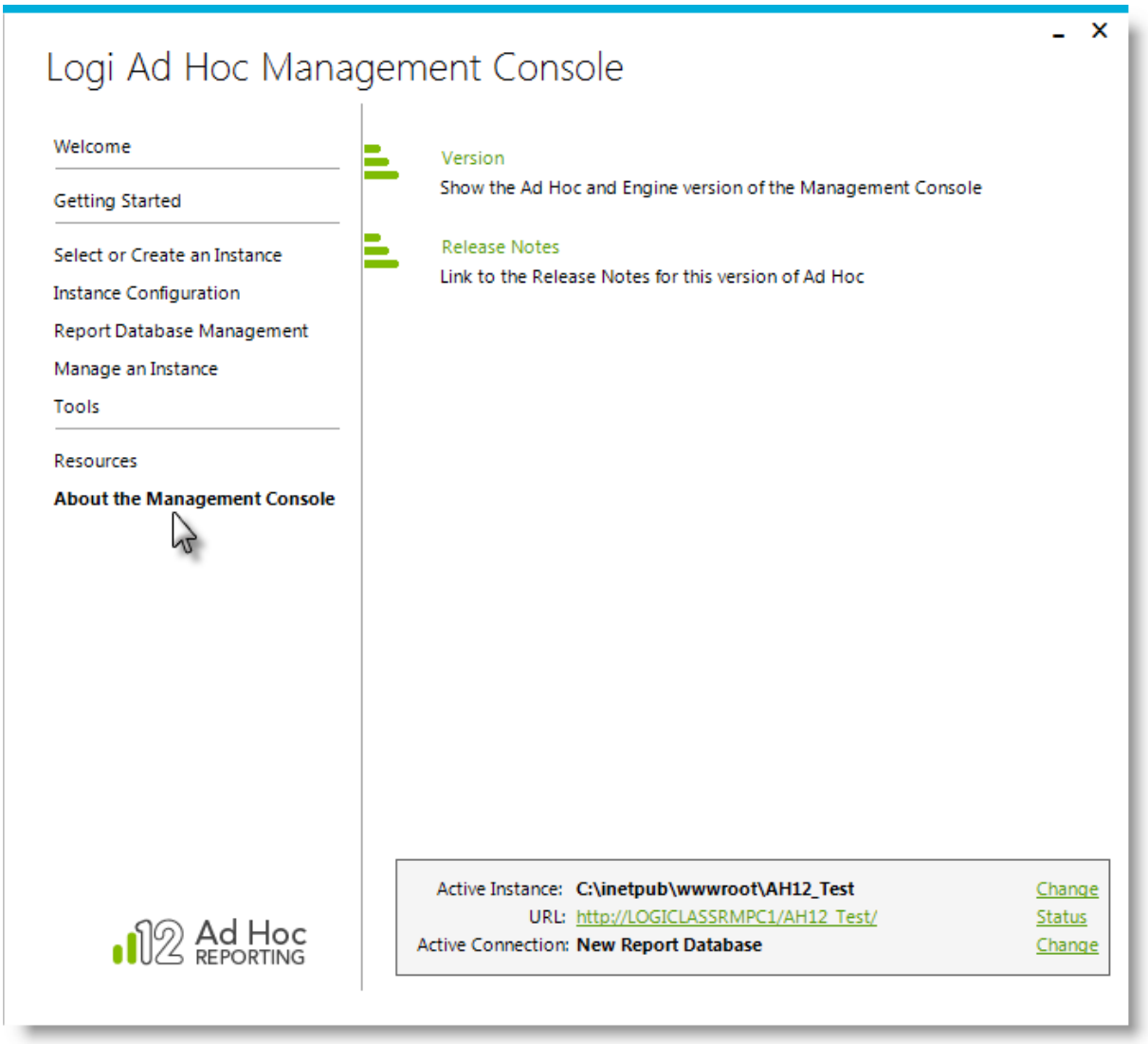
Click the **Resources** action group to display the following page:



About the Management Console

The About the Management Console action group presents actions that identify the Version, link to the online Release Notes and link to the License Agreement that was acknowledges as part of the installation.

Click the **About the Management Console** action group to display the following page:



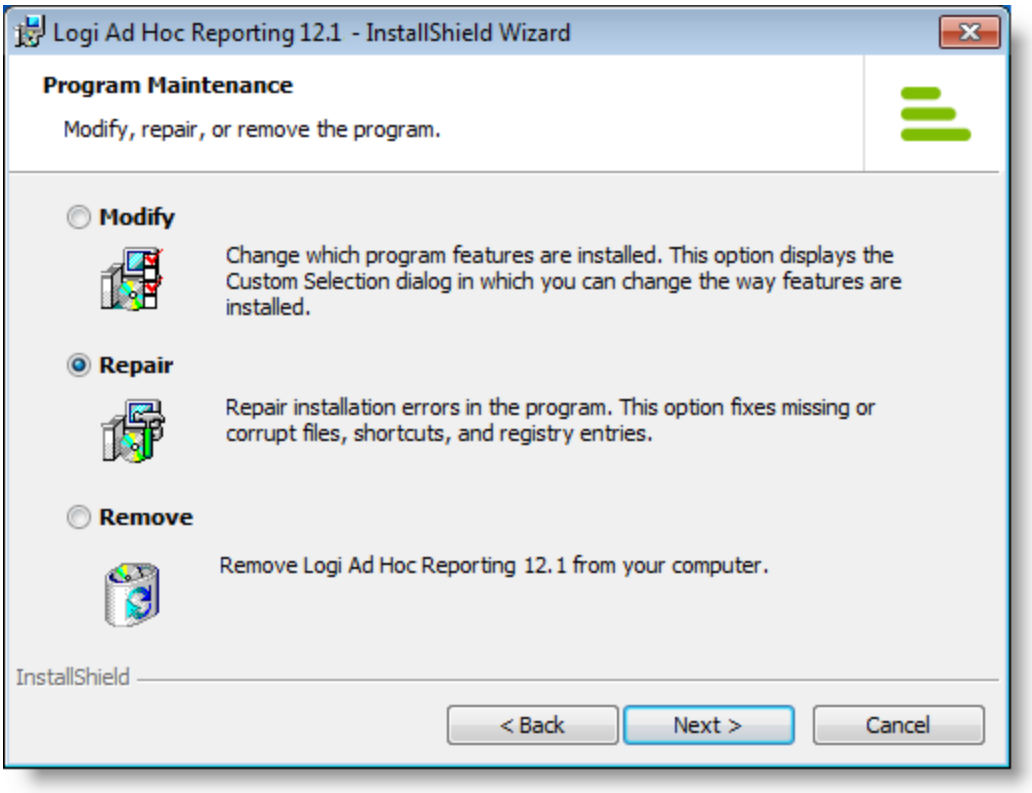
Managing the Management Console

The primary purpose of the installation file for the Management Console is to establish the MC on a server. The installation creates a folder structure, populates the folder structure with the proper files, and establishes the license files on the server.

The installation file also allows the System Administrator modify the installation (add the Logi Ad Hoc Scheduler to the configuration), repair the MC application, and remove the MC.

Repair

The MC can be repaired by executing the installation file. The installation wizard will eventually present the following dialog box:

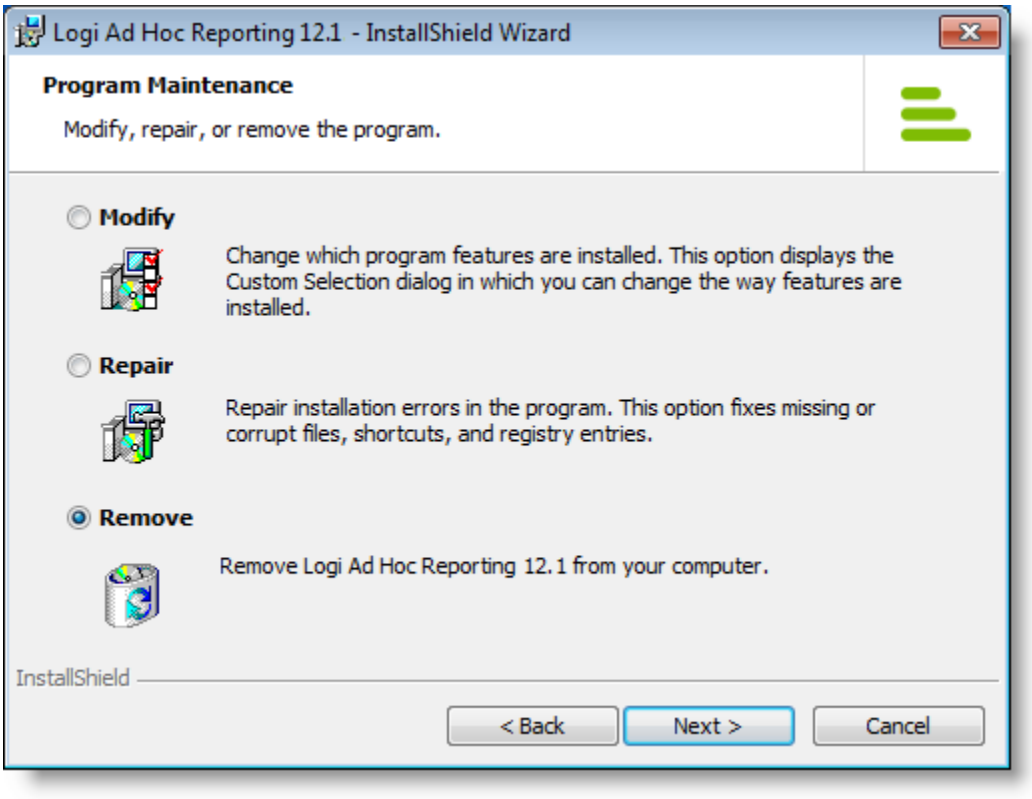


Select the *Repair* option and click **Next**. Continue through the installation wizard steps. The installation program will install the necessary files.

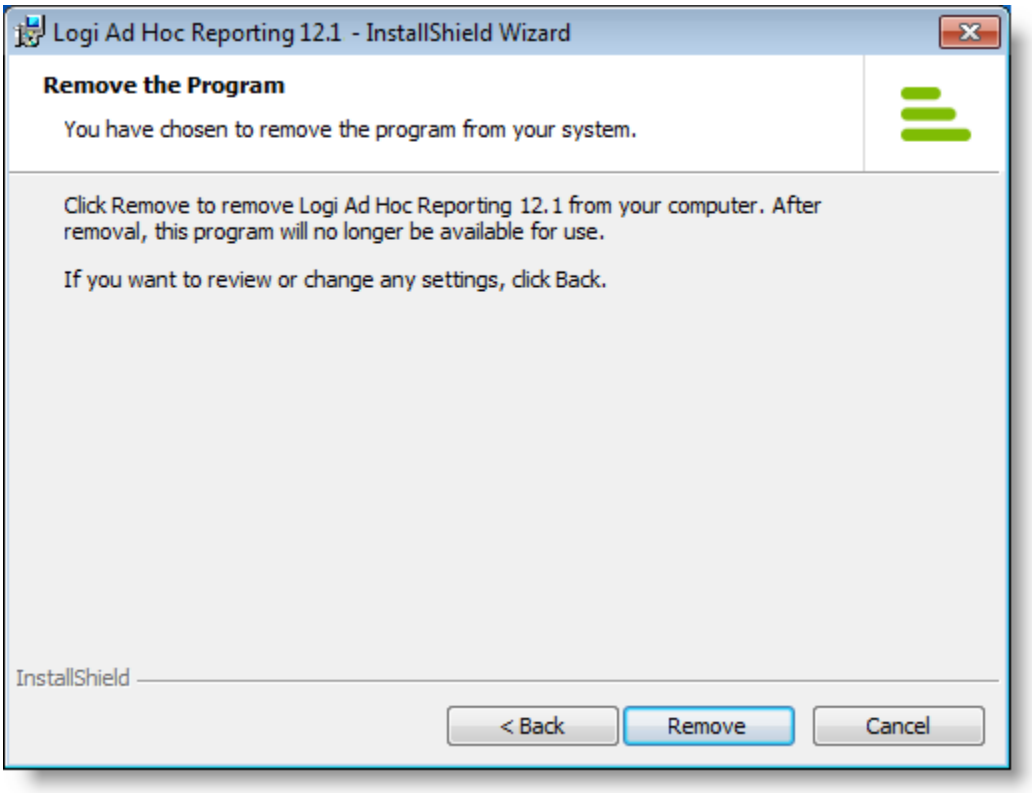
Remove

The MC can be removed by running the installation file and selecting the *Remove* option.

Note:
Removing the Management Console DOES NOT remove any instances of Ad Hoc. Only the Management Console for the version related to the installation program will be removed. If there are Ad Hoc instances related to the targeted version, removal of the Management Console will prevent management of those instances with that version.



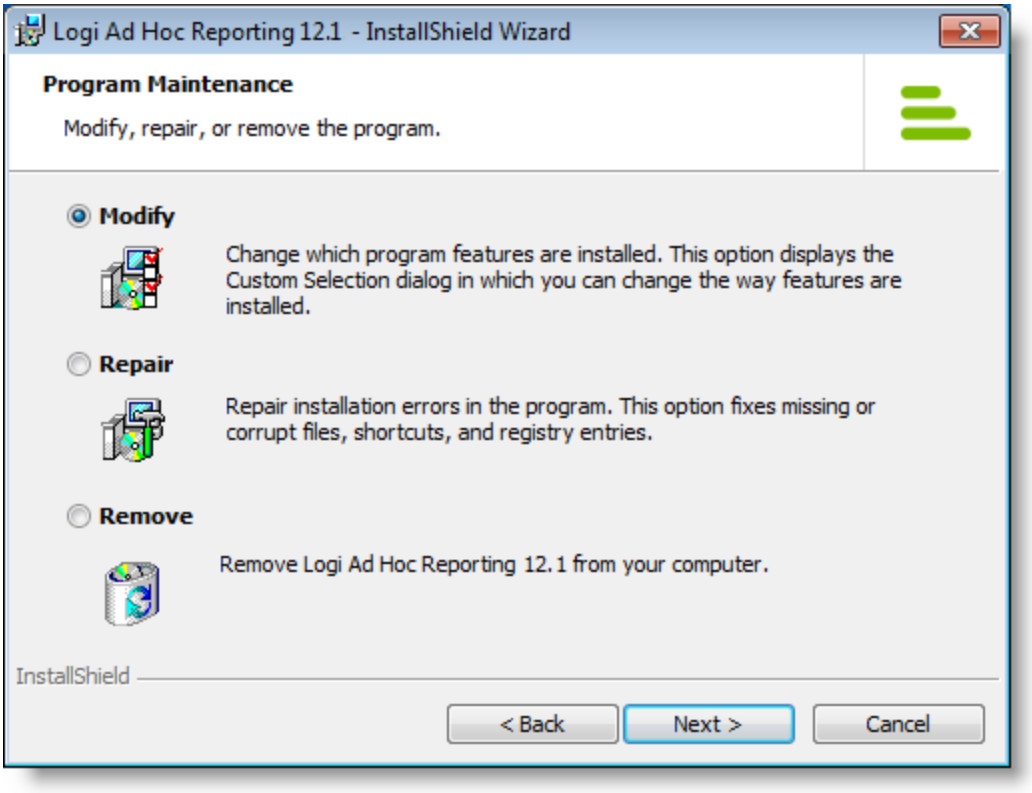
Select the *Remove* option and click **Next**. The following dialog box will be displayed:



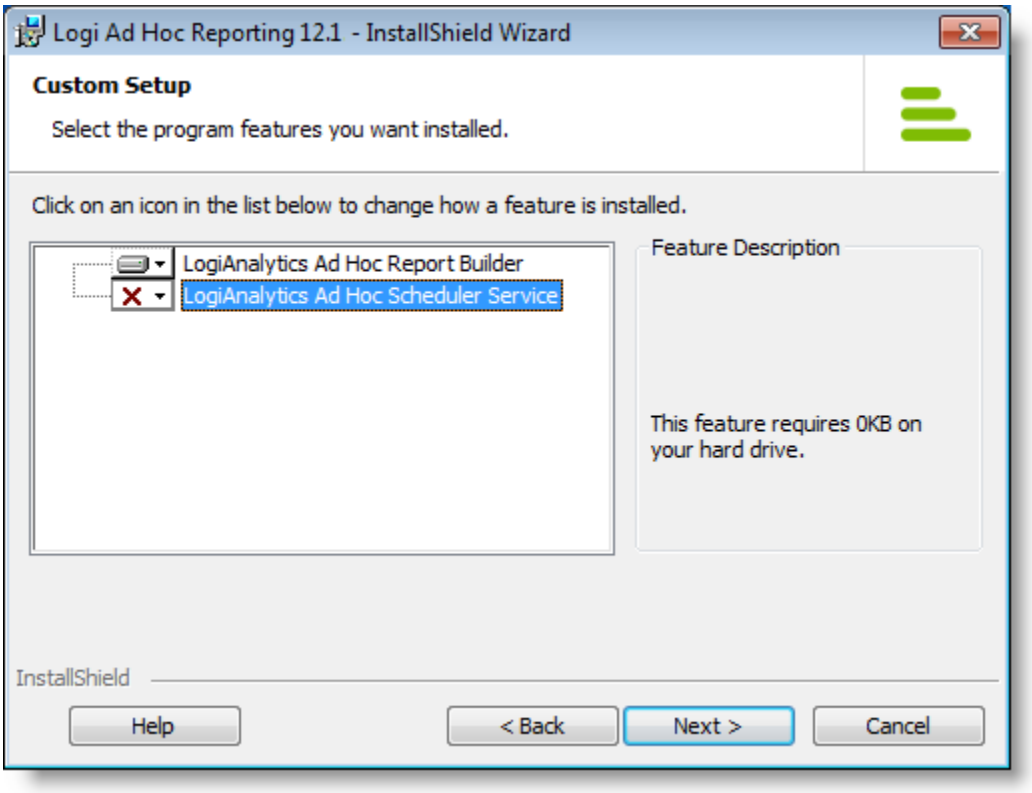
Click **Remove** to continue the process.

Modify

The installation file can also install the *Logi Ad Hoc Scheduler Service*. To install the Scheduler Service if it wasn't included in the original MC installation, launch the installation program and the following dialog box will be displayed:

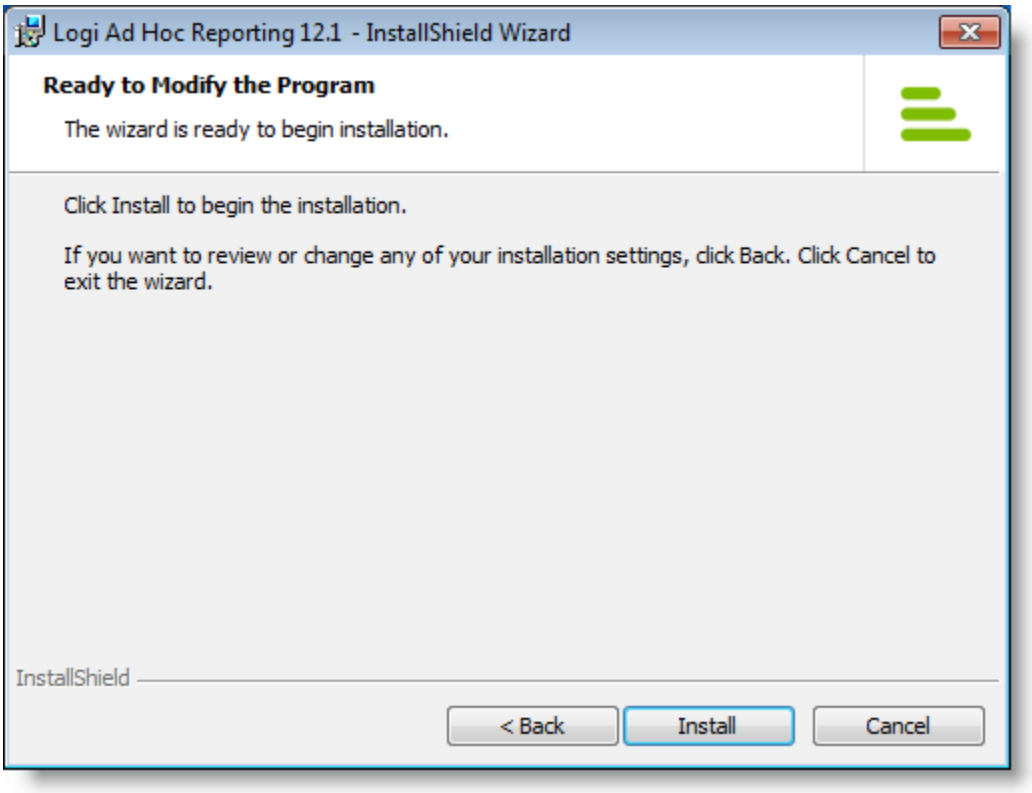


Select the *Modify* options and click **Next**. The **Custom Setup** dialog box will be displayed.



To indicate that the *Logi Ad Hoc Scheduler Service* should be installed, click drop-down list icon (shown with a red "X" above) adjacent to the Scheduler Service and select either of the first two options ("*This feature will be installed on local hard drive*" or "*This feature, and all sub features, will be installed on local hard drive*").

Click **Next** and the **Ready to Modify the Program** dialog box will be displayed.



Click **Install** to install the *Logi Ad Hoc Scheduler Service*.

Note:
The *Logi Ad Hoc Scheduler Service* may also be installed by selecting the "*Custom*" option during the initial install of the Management Console.

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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