

Logi Ad Hoc Management Console Usage Guide



Version 11.2
Last Updated: March 2014

Table of Contents

Introduction 5

 Document Overview 5

 Target Audience 7

 System Requirements 8

 Components 8

 Supported Reporting Databases 8

 Supported Metadata Databases 8

 Definitions 9

 Instance 9

 Metadata Database 9

 Reporting Database 9

 Report Definition Repository 9

 Active Instance 10

 Active Connection 10

Management Console Overview 11

 Purpose 11

 Management Console Interface 13

 Action Group Panel 13

 Target Panel 15

 Actions Panel 15

 Welcome Screen 16

 Getting Started Screen 16

Management of Ad Hoc Reporting Instances	17
Create an Ad Hoc Instance	17
Select an Instance	20
Upgrading an Instance	21
Repairing an Instance.....	23
Removing an Instance.....	24
Backing Up an Instance	25
Restoring an Instance.....	27
Configuration of an Ad Hoc Reporting Instance	40
Configuration Wizard	40
Metadata Connection	44
Application Settings	50
Scheduling.....	62
Emailing.....	66
Archiving	70
Event Logging	73
Configure Reporting Databases	81
Report Database Connections	83
Database Schema Wizard	90
Import/Manage Objects and Columns.....	91
User-friendly Object Names and Descriptions.....	93
User-friendly Column Names and Descriptions.....	96
Categorize Data Objects.....	99
Import Relationships.....	102
Tools.....	108

Report Management.....	108
Publish Managed Reports.....	111
Running the Publisher Wizard.....	112
Instance Synchronization.....	118
Creating a Synchronization Package.....	118
Diagnostic Scan.....	145
Cleanup.....	150
Internationalization.....	152
Additional Resources.....	166
Welcome.....	166
Getting Started.....	168
Resources.....	170
About the Management Console.....	172
Manage the Management Console.....	173
Repair.....	173
Remove.....	174
Modify.....	176
CONTACT US.....	179

Introduction

Document Overview

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

Throughout this document notations regarding differences between the Java and .Net versions of the Management Console and Ad Hoc are presented as follows:

Java -

Java related content

This Guide covers the usage of the Logi Ad Hoc Management Console (referred to as “the MC” in the remainder of this document). The following information is included in this guide:

- Introduction
 - Target Audience
 - System Requirements
 - Definitions
- Overview of the Management Console
 - Purpose
 - Navigation
 - Welcome
 - Getting Started
- Management of Ad Hoc Reporting instances
 - Creation of an instance
 - Selecting an instance
 - Updating an instance
 - Repairing an instance
 - Removing an instance
- Configuration of an Ad Hoc Reporting instance
 - Configuration Wizard
 - Metadata Connection
 - Application Settings
 - Scheduling
 - Emailing
 - Archiving
 - Event Logging

- Report Database Connections
 - Manage Schema Wizard
 - Categorize Data Objects
 - Import Relationships
 - Import Procedures

- Tools
 - Manage Reports
 - Publish Managed Reports
 - Instance Synchronization
 - Diagnostic Scan
 - Cleanup
 - Internationalization

- Miscellaneous
 - Getting Started
 - Welcome
 - Resources
 - About

- Configuration Wizard

- Manage the Management Console
 - Repair
 - Remove
 - Brand

- Contact Us

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

Document	Access; Location
Logi Ad Hoc Reporting Database Administration Guide	Shortcut; installation folder/ahHelp/Database_Admin_Guide.htm
Logi Ad Hoc Reporting Management Console Installation Guide	Shortcut; installation folder /ahHelp/Installation_Guide.htm
Logi Ad Hoc Reporting Software Integration Guide	Shortcut; installation folder/ahHelp/Integration_Guide.htm
Logi Ad Hoc Reporting System Administration Guide	Shortcut; installation folder/ahHelp/System_Admin_Guide.htm
Logi Ad Hoc Reporting Resource Manager Guide	Shortcut; installation folder/ahHelp/Resource_Guide.htm
Logi Ad Hoc Reporting Internationalization Guide	Shortcut; installation folder/ahHelp/Internationalization_Guide.htm

System Requirements

Components

The MC requires the following components installed server-side:

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

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

The MC also may require the following:

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

Supported Reporting Databases

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

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

Note:

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

Java -

Oracle, MySQL, and PostgreSQL are the supported reporting DBMSs.

Supported Metadata Databases

The MC supports the following metadata databases:

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

Java -

Oracle and MySQL are the supported metadata DBMSs.

Definitions

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 is 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 use SQL Server, Oracle, or MySQL 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 either “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.

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.

Note:

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 presented and an instance can be selected or created.

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

- Installation on a single web server
- Using 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.

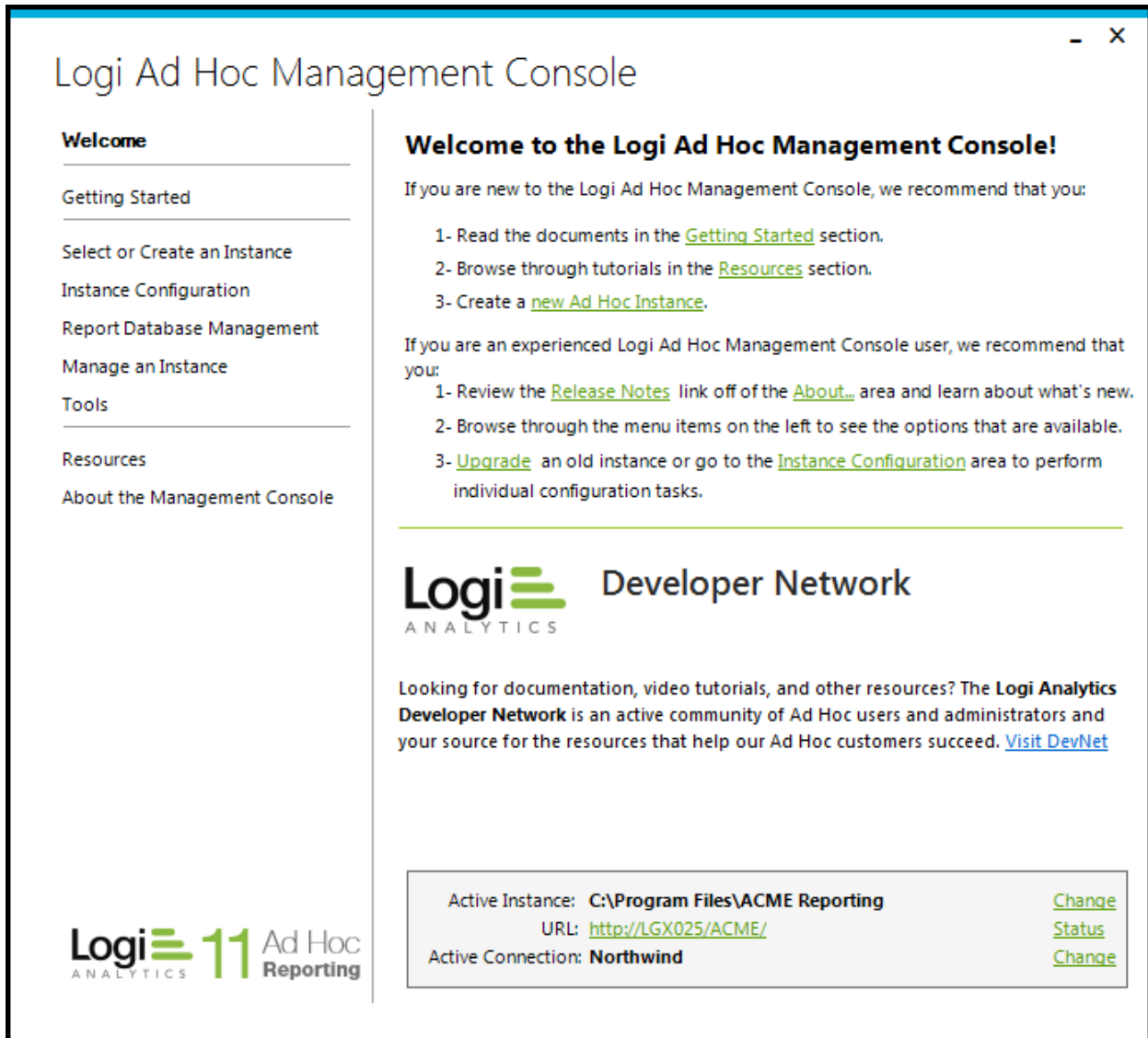
Java -

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

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

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

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

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

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

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

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

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

Target Panel

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

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

Note:

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

Note:

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

Java -

The URL is not presented 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 presented in the Actions panel.

Welcome Screen

When the MC is launched for the first time, there are no instances associated with the MC. The Target panel isn't shown. The Actions panel will show the content for the Welcome option.

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. For the first time user, it is highly recommended that the Configuration Wizard is used to create an instance. It is designed to present all of the steps required 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 users become more experienced with the MC, the individual configuration options may be exercised through the MC interface or the Configuration Wizard can be directed to present the options.

Management of Ad Hoc Reporting Instances

Create 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 to establish an Ad Hoc instance.

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

The second technique, covered here, is to click on **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 will be presented:

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

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

All of the fields must be specified. Use the **Browse** button to launch the **Browse for Folder** dialog. Navigate to the location of the folder into which the instance root folder will be created and click on **Make New Folder**. Enter the folder name and click on **OK**. The full path of the target folder for the instance will be displayed in the *Application Path*.

Java -

Only the Application Path is presented in the dialog.

Click on the **Create** button.

The physical folder structure will be created, permissions on the folders will be set, and the folder will be populated with files from the MC folder structure. In addition, an empty metadata database will be established as well as the _Settings.lgx file. 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.

Note:

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.

Note:

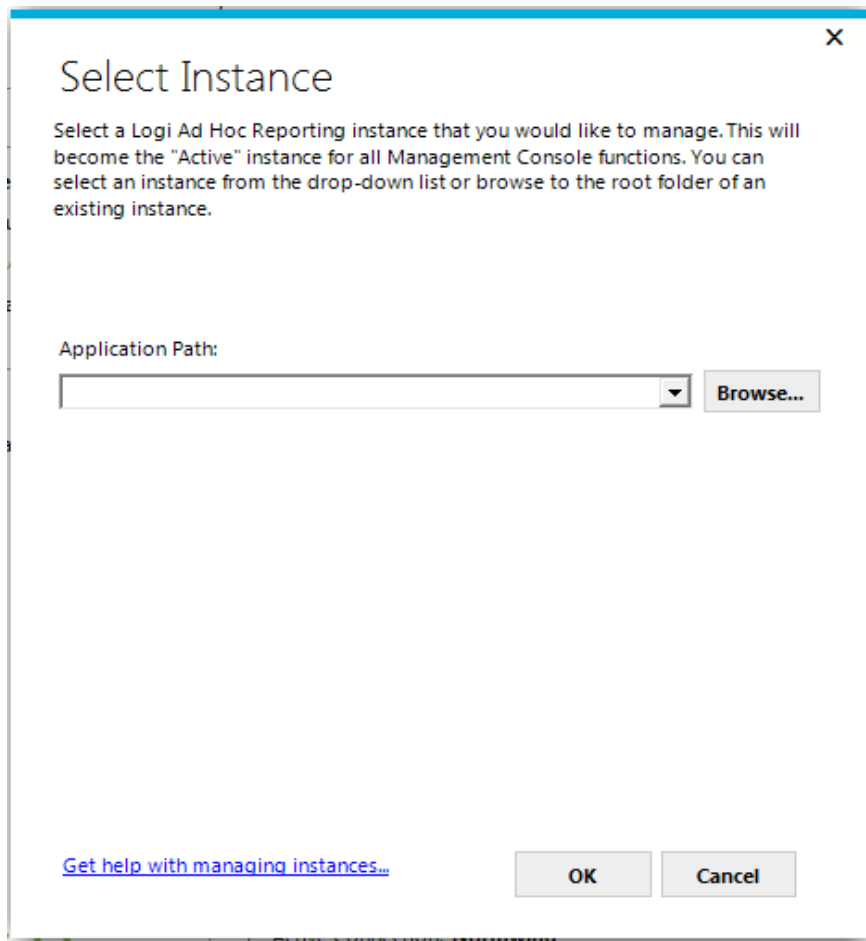
Once an Ad Hoc instance has been created and a reporting schema has been established in the metadata database, the instance may be accessed by clicking on the URL displayed in the Target Panel. The default login user name and password are “Admin” and “password”. *It is highly recommended that the administrator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

Select 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 on **Select or Create an Instance** and then click on **Select an Existing Instance**. Alternatively, you could also click on the **Change** link associated with the Active Instance in the target panel.

The **Select Instance** dialog will be presented.



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 on the **OK** button 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.

Active Instance: C:\Program Files\11.1.1	Change
URL: http://LGX025/11.1.1/	Status
Active Connection: Northwind	Change

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

Logi Ad Hoc Reporting - Manager

Upgrade Manager displays that status of all major areas of the application and helps you update or repair those if needed.

<p>Application</p> <p>Current Version: 11.233 Repair...</p> <p>Target Version: 11.246 Update...</p> <p>Application needs to be updated.</p>	<p>Reports</p> <p>Current Version: 11.233</p> <p>Target Version: 10.0.9 or newer Select...</p> <p>No Reports were found.</p>
<p>Metadata Database</p> <p>Current Version: 11.246</p> <p>Target Version: 10.2.3 or newer Update...</p> <p>Metadata database is up-to-date.</p>	<p>Rights</p> <p>Missing Rights:</p> <p>Current Version: 11.246</p> <p>Target Version: 10.2.0 or newer Update...</p> <p>Application rights are up-to-date.</p>

[Get help with upgrade manager...](#) [Close](#)

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

The *Application* area addresses the folders and files of the instance. Click on the **Update** button 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. A prompt will be issued to determine if a backup should be taken of the instance.

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

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

The *Reports* area addresses internal constructs of the report definitions. It is recommended that the reports are fixed by clicking the **Update** button, 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 on the **Update** button if it is enabled. All new rights are added to the System Administration permission package.

Note:

Whenever a metadata database is connected to an instance, a good practice is to run the upgrade manager. This is especially true when the metadata database has recently been created and connected to the instance.

Note:

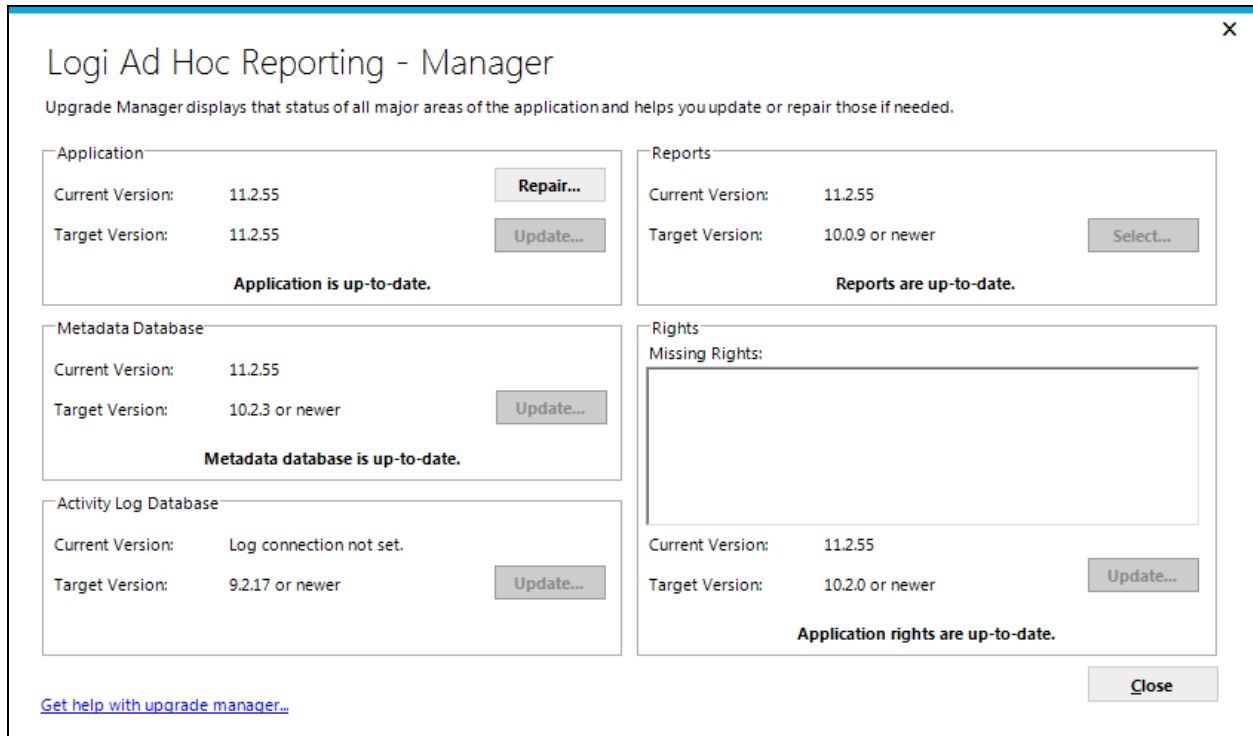
Customizations are always an issue with virtually any upgrade, including Ad Hoc. It is strongly suggested that the Diagnostic tool for the version of Ad Hoc being updated be applied to the instance before the upgrade, if the Diagnostic tool is available. The scan results will identify which files in the existing version have been modified 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* file and files in the *ahCustom* directory. Consequently it is critical that the System Administrator know the extent and content of the customizations to an Ad Hoc instance and is prepared to re-apply the customizations as necessary.

It is also noted that the virtual directory and shortcuts related to the 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 may manually make the necessary adjustments.

Repairing an Instance

If it has been determined that an instance has possibly become corrupt, the folders and files can be repaired by using the Upgrade Manager. After selecting the instance, click on **Manage an Instance** and then click on **Upgrade Instance** and the **Upgrade Manager** dialog will be displayed.



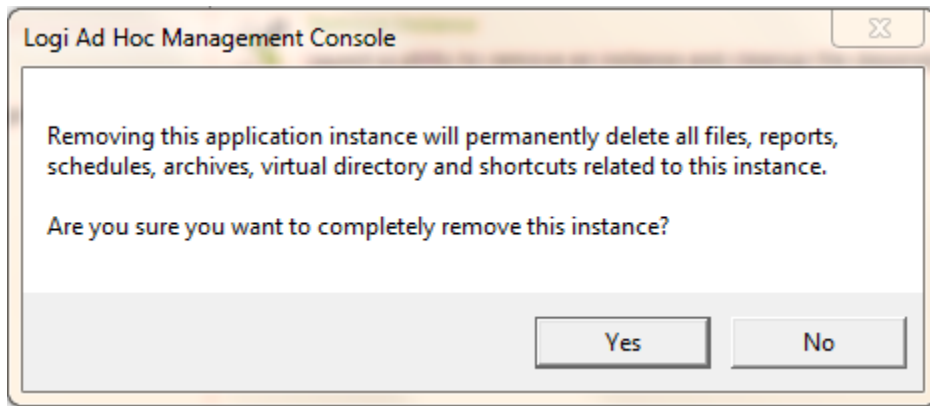
To repair the active instance, click on the **Repair** button in the *Application* area. A prompt will be issued to determine if a backup should be taken of the instance.

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

As with “Upgrading an Instance”, 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. In addition, the process will prompt the System Administrator to make a backup of the instance.

Removing an Instance

To remove the active instance, click on **Manage an Instance** and then click on **Remove Instance**. The following confirmation dialog will be presented:



Click on the **Yes** button 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.

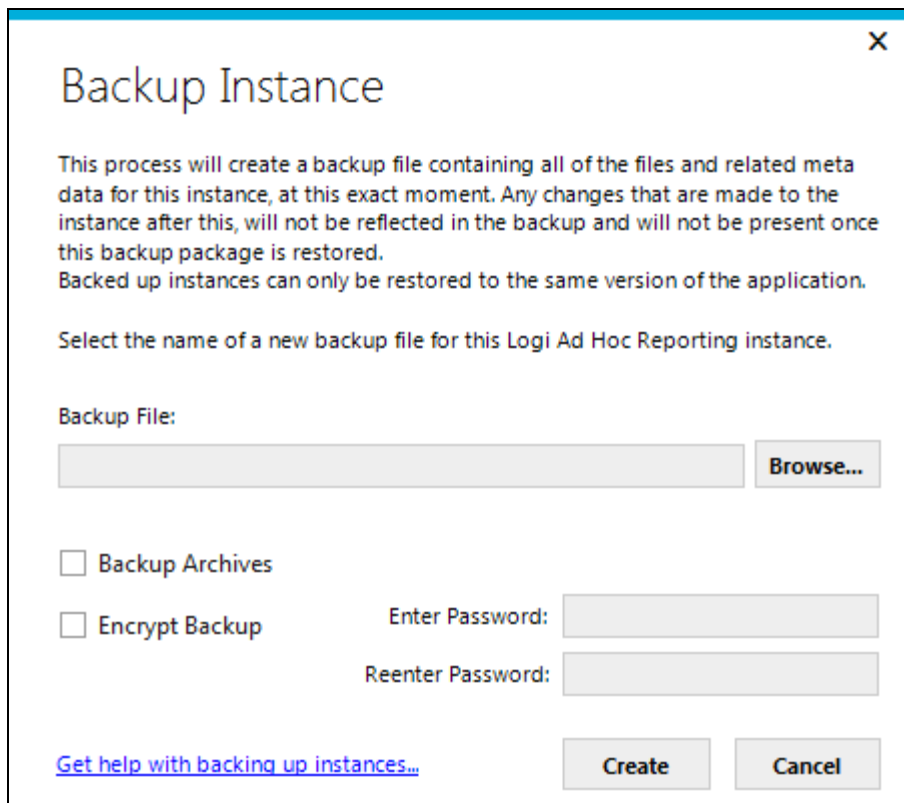
Note:

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 Guide.

Backing Up an Instance

The Backup utility will create a compressed file (zip) with all of the physical files and metadata associated with the instance. The backup utility provides the option to include archived reports and to encrypt and provide password protection of the backup file.

To create a backup of the active instance, click on the **Manage an Instance** action group and the **Backup Instance** action. The following dialog will be presented:



Backup Instance

This process will create a backup file containing all of the files and related meta data for this instance, at this exact moment. Any changes that are made to the instance after this, will not be reflected in the backup and will not be present once this backup package is restored. Backed up instances can only be restored to the same version of the application.

Select the name of a new backup file for this Logi Ad Hoc Reporting instance.

Backup File:

Browse...

Backup Archives

Encrypt Backup

Enter Password:

Reenter Password:

[Get help with backing up instances...](#) **Create** **Cancel**

Either enter a fully qualified path and filename for the backup file or click on the **Browse** button to set the location.

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

To encrypt the resultant backup file, enable the **Encrypt Backup** checkbox.

To password protect the resultant backup file, enable the **Encrypt Backup** checkbox and enter the same password information in the **Enter Password** and **Reenter Password** text boxes.

Note:

Backup files should be managed by the System Administrator. It is suggested that regular backups are taken 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.

Note:

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.

Note:

It is recommended that user activity is 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. Replicating an instance is not as simple as restoring 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 is using the core information from one instance to create an entirely new instance. Seasoned Ad Hoc System Administrators will recognize the purpose and content of the various dialogs that may be presented during the restore process. Not all of the dialogs presented below are presented during the restore. The dialogs that are presented are reflective of the configuration of the source Ad Hoc instance.

Note:

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

Note:

It is highly recommended 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.

Note:

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 on the **Manage an Instance** action group and the **Restore Instance** action to initiate the restore process. The following **Restore Instance** dialog will be presented:

Restore Instance

This process will restore a backup file in a selected path. The restored instance will be the same version as the backed up instance but you can choose to restore the meta data into a new database.

Select the backup file that you want to restore and the location where you want to restore it to.

Backup File: **Browse...**

Password:

Restore Location: **Browse...**

Virtual Directory Name:

Shortcut Settings

All Users Current User

Program Group:

Shortcut Name:

[Get help with restoring an instance..](#)

Next **Cancel**

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 to the file or clicking on the **Browse** button.

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 folder in the **Restore Location** textbox or clicking on the **Browse** button and creating a new folder at the appropriate location.

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

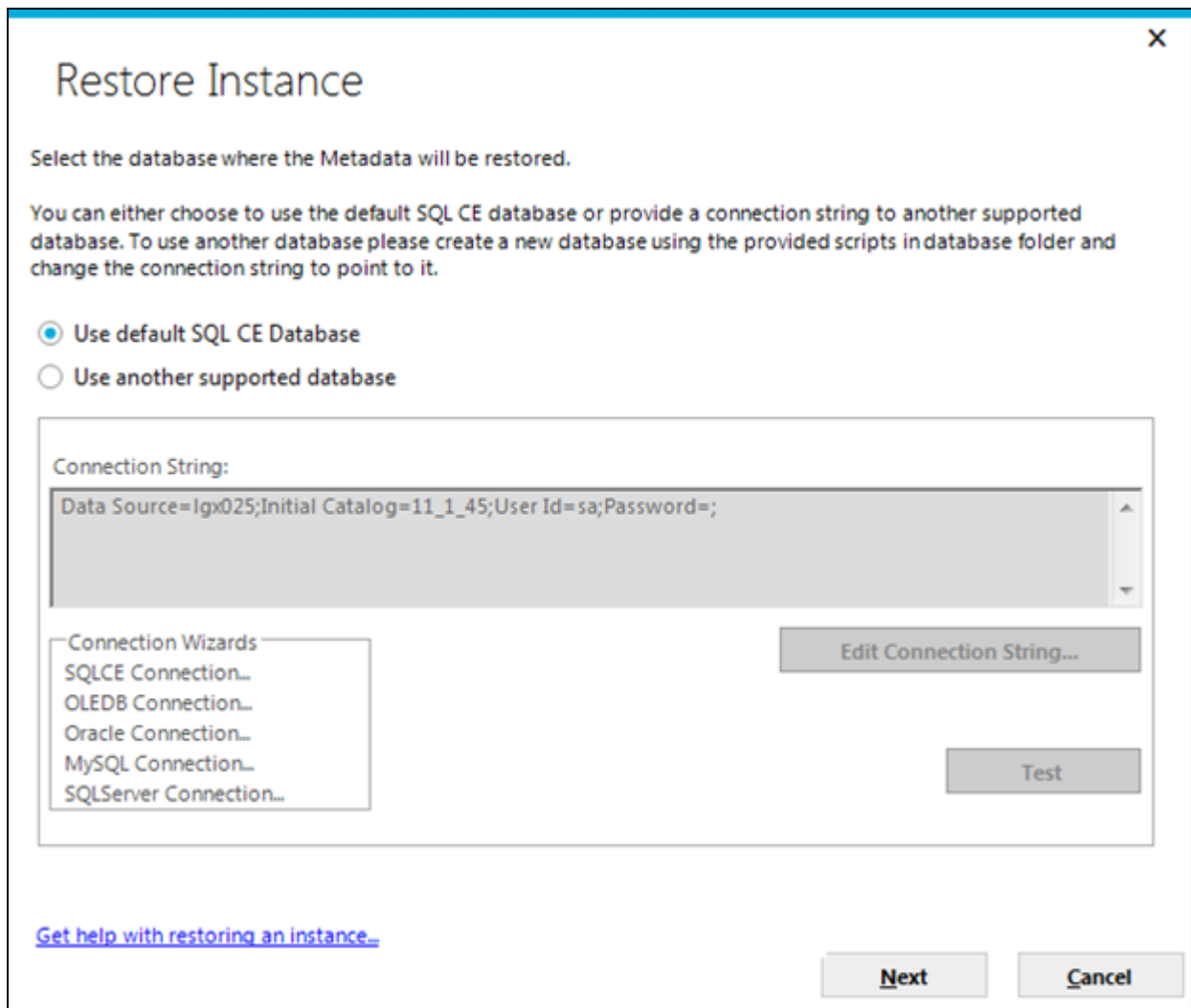
Identify the shortcut properties for the restored instance by entering the **Program Group** and **Shortcut Name** and determine the scope of the shortcut.

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

Note:

The Restore Location folder must be empty. The Virtual Directory and Shortcut Name must be unique.

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



Select the **Use Default SQL CE Database** option if that is 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 is 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 on the **Edit Connection String** button or exercise one of the connection wizard links.

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

Click on the **Next** button 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 will be displayed.

The initial options presented in this dialog mirror the configuration of the source instance. 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 on the **Browse** button to establish a new folder for the report files.

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

Click on the **Next** button to display the next dialog in the Restore Instance utility.

In the above example, the report definitions were stored in a database in the source instance. When the information is restored it is expected that the target instance will also store the report definitions in a database. The following dialog with the requisite two tabs will be presented when the **Configure Database** button is clicked.

Manage Database

Connection
External Definition Settings

Use any of the provided wizards to build a connection string or click the "Edit Connection String" for other, free-format connections.

Database Connection String:

```
Data Source=lgx025;Initial Catalog=11_1_45_Reports;User Id=sa;Password=;
```

Connection Wizards

- [OLEDB Connection...](#)
- [MySQL Connection...](#)
- [Oracle Connection...](#)
- [SQLServer Connection...](#)
- [PostgreSQL Connection...](#)

Database: SQL Server ▼

Connection Type: SQL Server ▼

Manage Database

[Connection](#) External Definition Settings

Table Name: <input type="text" value="Reports"/>	Report Name: <input type="text" value="Name"/>
	Column: <input type="text" value="Definition"/>
	Report Definition Colu: <input type="text" value="Definition"/>
Select Procedure: <pre>SELECT [Definition] FROM [Reports] WHERE [Name]=@ReportID</pre>	Update Procedure: <pre>UPDATE [Reports] SET [Definition] =@Definition WHERE [Name]=@ReportID</pre>
Insert Procedure: <pre>INSERT INTO [Reports] ([Definition], [Name]) VALUES (@Definition,@ReportID)</pre>	Delete Procedure: <pre>DELETE FROM [Reports] WHERE [Name] =@ReportID</pre>

[Auto Generate Procedure SQL](#)

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 more fully covered in the **Application Settings** section of this guide.

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 to create 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 present the **Configure Scheduling** dialog to let the System Administrator identify the scheduler service and credentials.

Restore Instance

Scheduler Service

This dialog allows you to select and configure the scheduling service and determine the database connections that will be permitted to schedule reports.

Scheduler method: Logi Scheduling Service Windows

Server Name: localhost

Password: myKey

Port Number: 56111

The Server Name must be the name of the server where the Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service.

Test Scheduler Settings...

[Get help with restoring an instance...](#)

Next **Cancel**

Select the **Scheduler Method** and provide the credentials to allow schedules to be stored. Click on the **Test Scheduler Settings** button to verify that the credentials allow new scheduled 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 present the **Configure Archiving** dialog.

The screenshot shows a dialog box titled "Restore Instance" with a close button (X) in the top right corner. Inside the dialog, there is a section titled "Archive Settings" with the following text: "Reports can be archived manually and on a scheduled basis. This page allows you to configure the archive format, folder and virtual directory. You can also enable archiving for each reporting database." Below this text, there is a checkbox labeled "Archiving for all Databases" which is checked. To the right, there are four input fields: "Archive Report Format:" with a dropdown menu set to "PDF"; "Archive Folder:" with a text box containing "C:\Archives\11.1.12" and a "Browse..." button; "Archive Web Path URL:" with a text box containing "http://lgx025/11.1.2.Arc" and a hint below it that says "Hint: Should look something like 'http://myserver/myarchive'"; and "Auto Archive:" with an unchecked checkbox. At the bottom right of the settings area is an "Apply Changes" button. At the bottom of the dialog are "Next" and "Cancel" buttons. A link "Get help with restoring an instance..." is located at the bottom left.

The **Configure Archiving** dialog allows the System Administrator to identify the reporting database, physical archive folder, the associated virtual directory, 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 on a row in the report database list. To select all report databases, click on the upper left corner of the list.

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

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 on the Browse button to either 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 pre-set and non-editable if the *Auto Archive* checkbox is enabled.

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

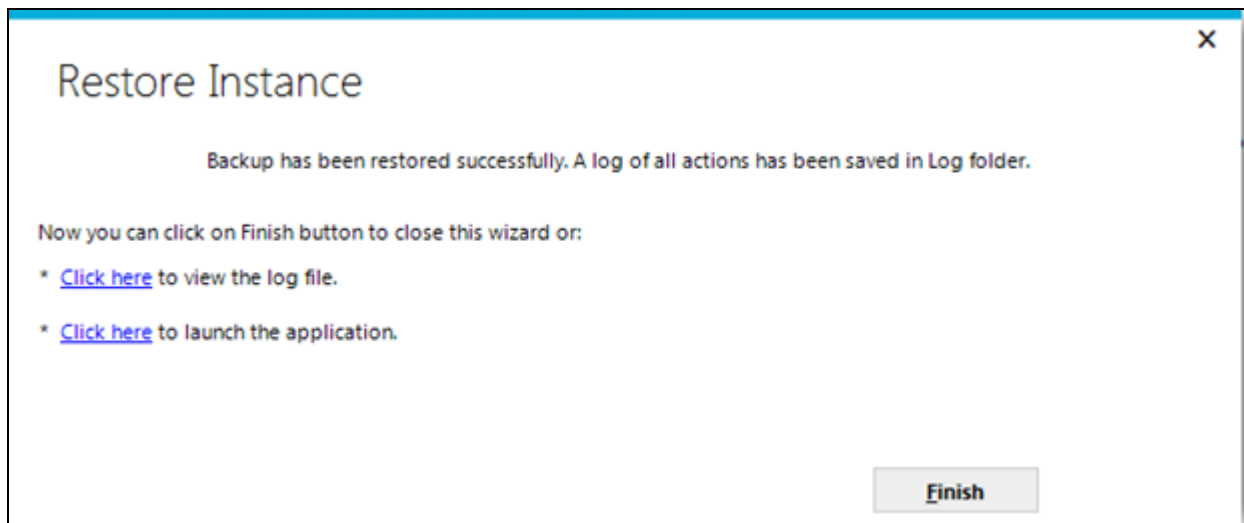
Click on the **OK** button to confirm any unsaved changes and dismiss the dialog.

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.

Once all of the required **Restore Instance** steps have been addressed, the final Finish dialog is presented.



This dialog allows the System Administrator to review the log file that was created during the restoration process. An sample excerpt of a log file is presented below.

```

Restore started at: 8/2/2012 9:42:29 AM

Restore Location: C:\Program Files\10.2.25SS_Restore
Backup File: C:\Program Files\10.2.25SS\Backup_08022012.lgxbak
Virtual Directory: 10.2.25.SS.Restore
All Users: True
Program Group: Logi Ad Hoc Reporting
Shortcut Name: 10.2.25 SS Restore

Restoring Instance Files
File: About.aspx
File: AdHocHelp.css
File: AdHocMobile.css
File: ApplicationError.aspx
File: Backup_07312012.lgxbak
File: ChangePassword.aspx
File: Default.aspx
File: gacutil.exe
File: Gateway.aspx
    
```

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

The dialog also allows the System Administrator to launch the newly created application.

Clicking on the **Finish** button will terminate the **Restore Instance** process.

Configuration of an Ad Hoc Reporting Instance

Configuration Wizard

The Configuration Wizard leads the System Administrator through a series of dialogs to configure the active instance. Which dialogs are presented 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 may be launched several ways in the MC:

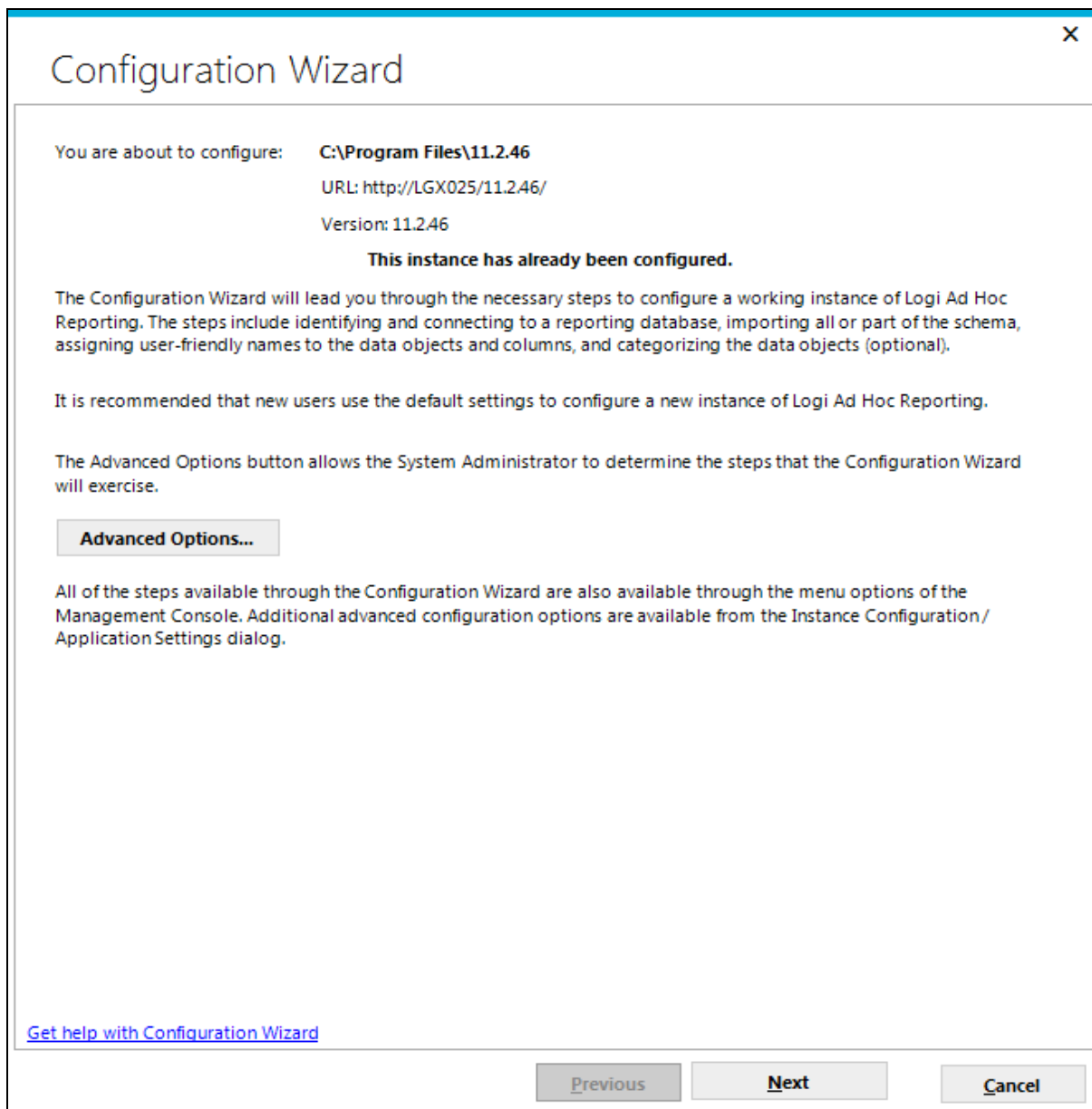
- Click on **Welcome** and either the **new Ad Hoc Instance** link or the **Configuration Wizard** link.
- Click on **Getting Started** and then **Configuration Wizard**
- Click on **Instance Configuration** and then **Configuration Wizard**

*All of the core dialogs of the Configuration Wizard may be exercised individually by clicking on any of the actions presented 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 is launched. The Configuration Wizard’s typical initial dialog is presented below.

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

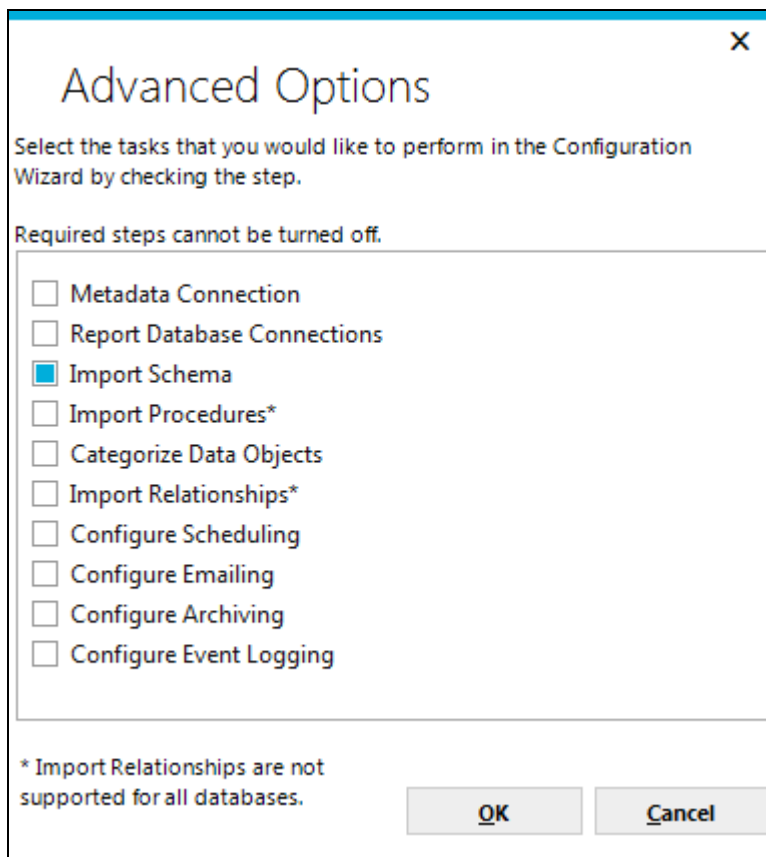


The **Advanced Options** button allows the System Administrator to pick the configuration options that the **Configuration Wizard** will lead them through. The **Configuration Wizard** will always, by default, present the dialogs necessary to complete the minimum requirements for a working instance of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

Java -

The URL of the Ad Hoc instance will not be presented in the dialog.

The **Advanced Options** dialog allows the System Administrator to include additional dialogs in the Configuration Wizard's process.



The configuration steps that require completion will be checked automatically.

Metadata Connection presents a dialog to change and test the metadata database connection string.

Import Schema presents the dialogs to import and manage the metadata database content related to the reporting database schema.

Categorize Data Objects presents the dialog to create categories of data objects and assign data objects to them.

Import Relationships presents the dialog to import join relationship information from the reporting database to the metadata database.

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

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

Configure Archiving presents the dialog to identify the archive repository and format and to enable archiving for each reporting database.

Configure Event Logging presents the dialog 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 Guide.

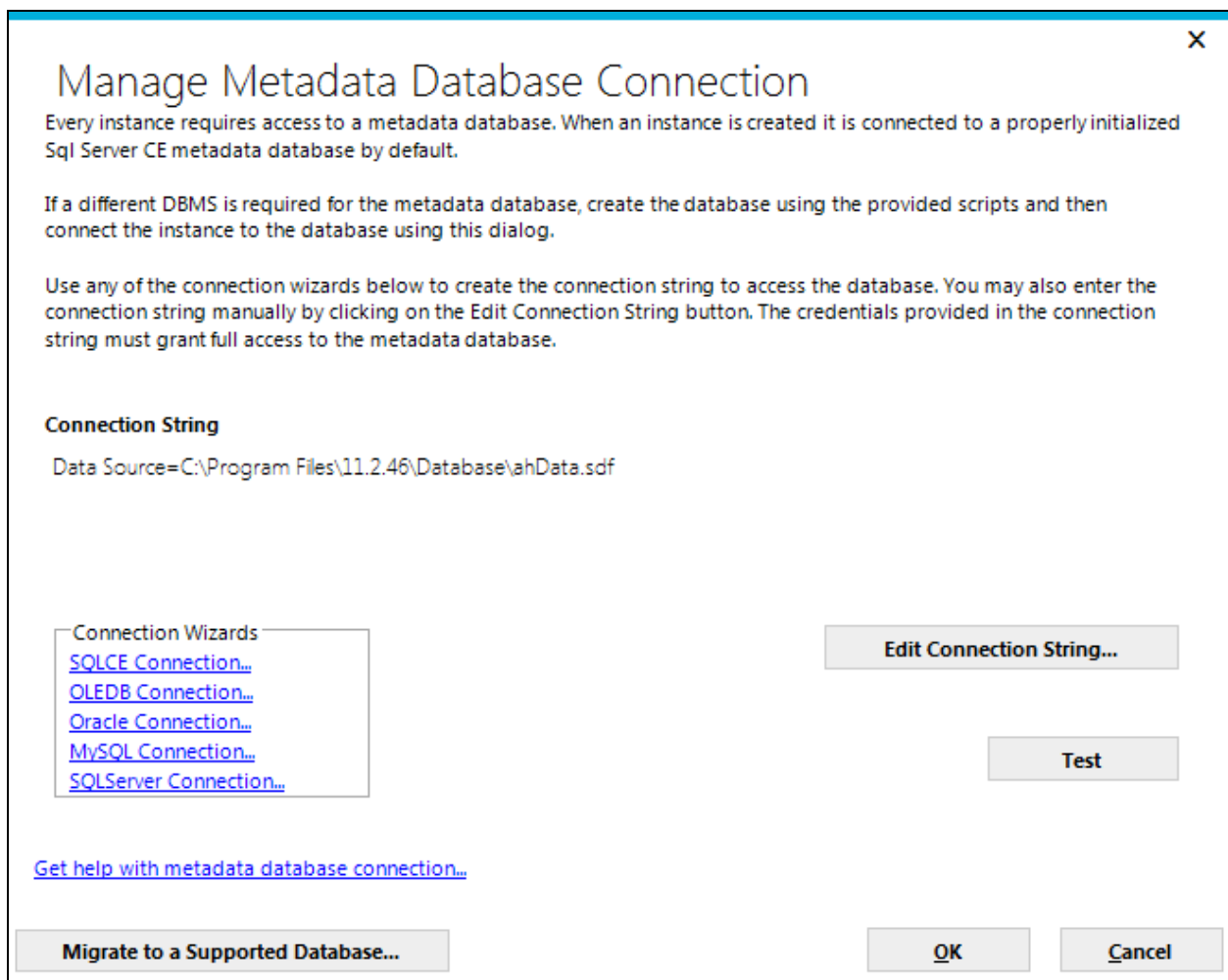
Click on the **Next** button to go through the identified **Configuration Wizard** processes.

Metadata Connection

Before establishing an instance of Ad Hoc, the System Administrator must 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 fit into the computing environment better.

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 the *Database* folder.

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



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.

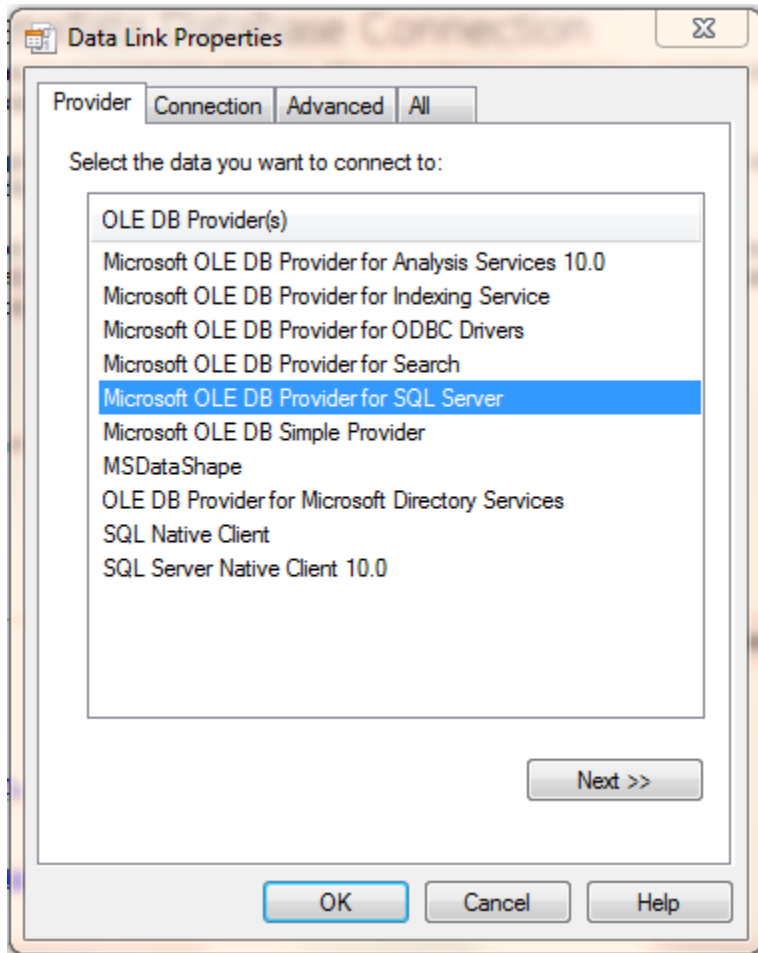
Java -

The supported metadata DBMSs are Oracle and MySQL. Connection links will be presented 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 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, as the name implies, allows the System Administrator to migrate the metadata to a different metadata database. The most frequent usage is converting the metadata from the default SQLCE database to SQL Server, Oracle or MySQL. As outlined above, the target database should have been established with the scripts provided prior to the migration.

The **OLEDB Connection** link presents the **Data Link Properties** dialog.



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

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

The screenshot shows a dialog box titled "Build MySQL Connection String" with a close button (X) in the top right corner. The dialog contains five input fields: "Server:", "Database:", "Port:" (with the value "3306" entered), "User:", and "Password:". At the bottom right, there are two buttons: "OK" and "Cancel".

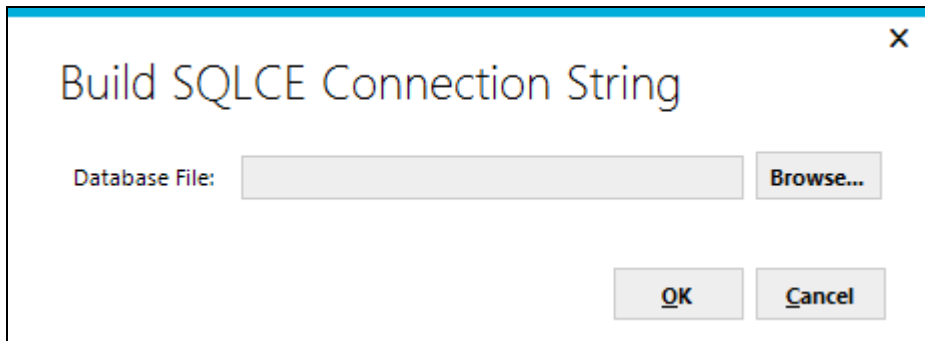
Fill in the required information and click on the **OK** button to return to the **Metadata Database Connection** dialog.

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

The screenshot shows a dialog box titled "Build Oracle Connection String" with a close button (X) in the top right corner. The dialog contains five input fields: "Server:", "Service Name:", "Port:" (with the value "1521" entered), "User:", and "Password:". At the bottom right, there are two buttons: "OK" and "Cancel".

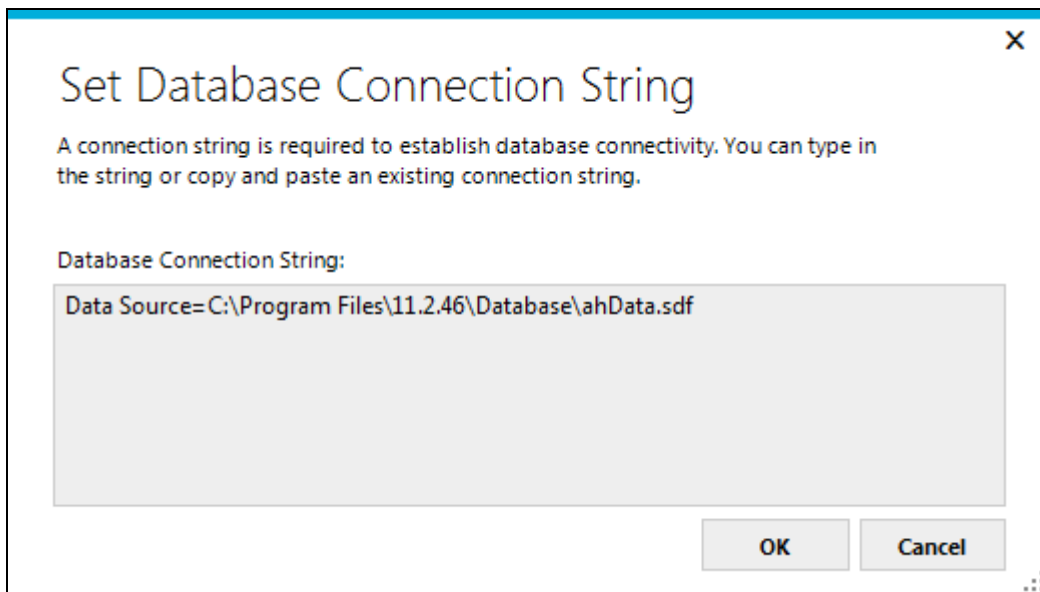
Fill in the required information and click on the **OK** button to return to the **Metadata Database Connection** dialog.

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



Either enter the full path to the *ahData.sdf* file or click on the **Browse** button to find it. Click on the **OK** button to return to the **Metadata Database Connection** dialog.

As an alternative to using any of the provided links to specify the connection string to the metadata database, the System Administrator could click on the **Edit Connection String** button to manually enter the connection string. The **Set Database Connection String** dialog will be presented.



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

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

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

Note:

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 add, update and remove data as well as alter the schema of the metadata database.

Note:

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

Application Settings

The Application Settings dialog allows the System Administrator adjust the core configurations for the active instance. The following dialog will be displayed:

Application Settings [X]

This dialog allows you to adjust many of the configuration settings of an Ad Hoc instance.

Manipulation of these settings can have a dramatic effect on the behavior of the instance and requires a thorough knowledge of the architecture of Ad Hoc.

The default settings are optimized for the most popular situations. You can return the settings to their default values by clicking on the Restore Defaults button.

General | UI Features | Reporting Options | Reporting Features | Security | More

Company Name:

Product Name:

Instance ID:

First Day of Fiscal Year: Month: Day:

Report Backup Folder:

Configuration Backup Folder:

[Get help with Application Settings...](#)

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 and 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 default date reformat and enable the “live preview” feature and debugging.

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

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

To reset all values in the **Application Settings** dialog back to their original configuration, click on the **Restore Defaults** button.

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

The individual tabs are described in more detail below.

General Tab (*displayed above*)

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

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

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

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

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

The *Configuration Backup Folder* 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 instance root/Database folder.

UI Features Tab

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

The screenshot shows the 'Application Settings' dialog box with the 'UI Features' tab selected. The dialog contains the following settings:

- Show menu and submenu bars:** (checked)
- Grid Paging:**
 - Off
 - On
 - Rows per page:
- List Search Options:**
 - Never show
 - Always show
 - Show if the list contains more than rows
- Report View Target:**
 - New window
 - Application frame/window
 - Application top level window
- List no-access reports:** (checked)

At the bottom of the dialog, there is a link: [Get help with Application Settings...](#) and three buttons: **Restore Defaults**, **OK**, and **Cancel**.

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.

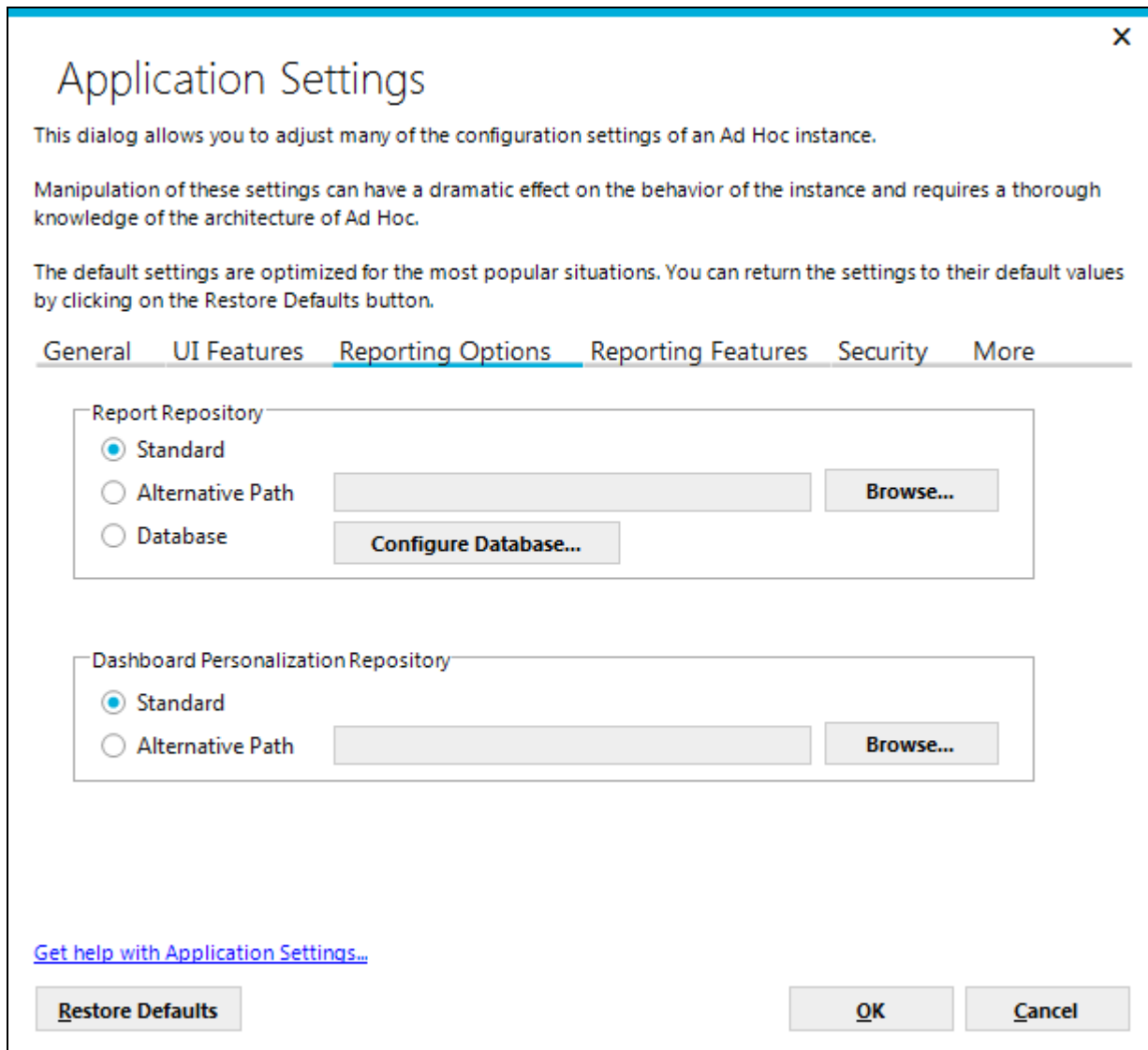
Report View Target determines how the browser should behave when a report is run.

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 eliminated from the list.

Reporting Options Tab

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



The Report Repository frame presents the three options for 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 *instance root/_Defintions/_Reports* folder.
- An *Alternative Path* for the report definitions can be set by clicking the **Browse** button and either selecting or creating a target folder in the **Browse for Folder** dialog. The *Alternative Path* option must also be selected.

- 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.

Dashboard personal preferences are stored in files in the *instance root/ahSavedDashboards* by default. To facilitate the configuration of Ad Hoc for a clustered environment, the System Administrator may specify an *Alternative Path* for the *Dashboard Personalization Repository* by clicking on the **Browse** button and either selecting or creating a target folder.

Clicking on the **Configure Database** button will display the following dialog:

Manage Database

Connection External Definition Settings

Use any of the provided wizards to build a connection string or click the "Edit Connection String" for other, free-format connections.

Database Connection String:

Connection Wizards

- [OLEDB Connection...](#)
- [MySQL Connection...](#)
- [Oracle Connection...](#)
- [SQLServer Connection...](#)
- [PostgreSQL Connection...](#)

Edit Connection String...

Test

Save Close

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.

The screenshot shows a web interface titled "Manage Database" with two tabs: "Connection" and "External Definition Settings". The "External Definition Settings" tab is active. The form contains the following elements:

- Table Name:** A text input field.
- Report Name:** A text input field.
- Column:** A text input field.
- Report Definition:** A text input field.
- Column:** A text input field.
- Select Procedure:** A large text area.
- Update Procedure:** A large text area.
- Insert Procedure:** A large text area.
- Delete Procedure:** A large text area.
- Auto Generate Procedure SQL:** A blue hyperlink located below the procedure text areas.
- Test:** A button located to the right of the procedure text areas.
- Save:** A button located at the bottom right.
- Close:** A button located at the bottom right.

Once the *Table Name*, *Report Name Column* and *Report Definition Column* have been specified, clicking on the **Auto Generate Procedure SQL** link 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 DBMS's 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:

Manage Database

Connection External Definition Settings

Table Name: Report Name:
 Column: Report:
 Definition Colu:

Select Procedure:

```
SELECT [Definition] FROM [Reports]
WHERE [Name]=@ReportID
```

Update Procedure:

```
UPDATE [Reports] SET [Definition]
=@Definition WHERE [Name]=@ReportID
```

Insert Procedure:

```
INSERT INTO [Reports] ([Definition],
[Name]) VALUES
(@Definition,@ReportID)
```

Delete Procedure:

```
DELETE FROM [Reports] WHERE [Name]
=@ReportID
```

[Auto Generate Procedure SQL](#)

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.

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

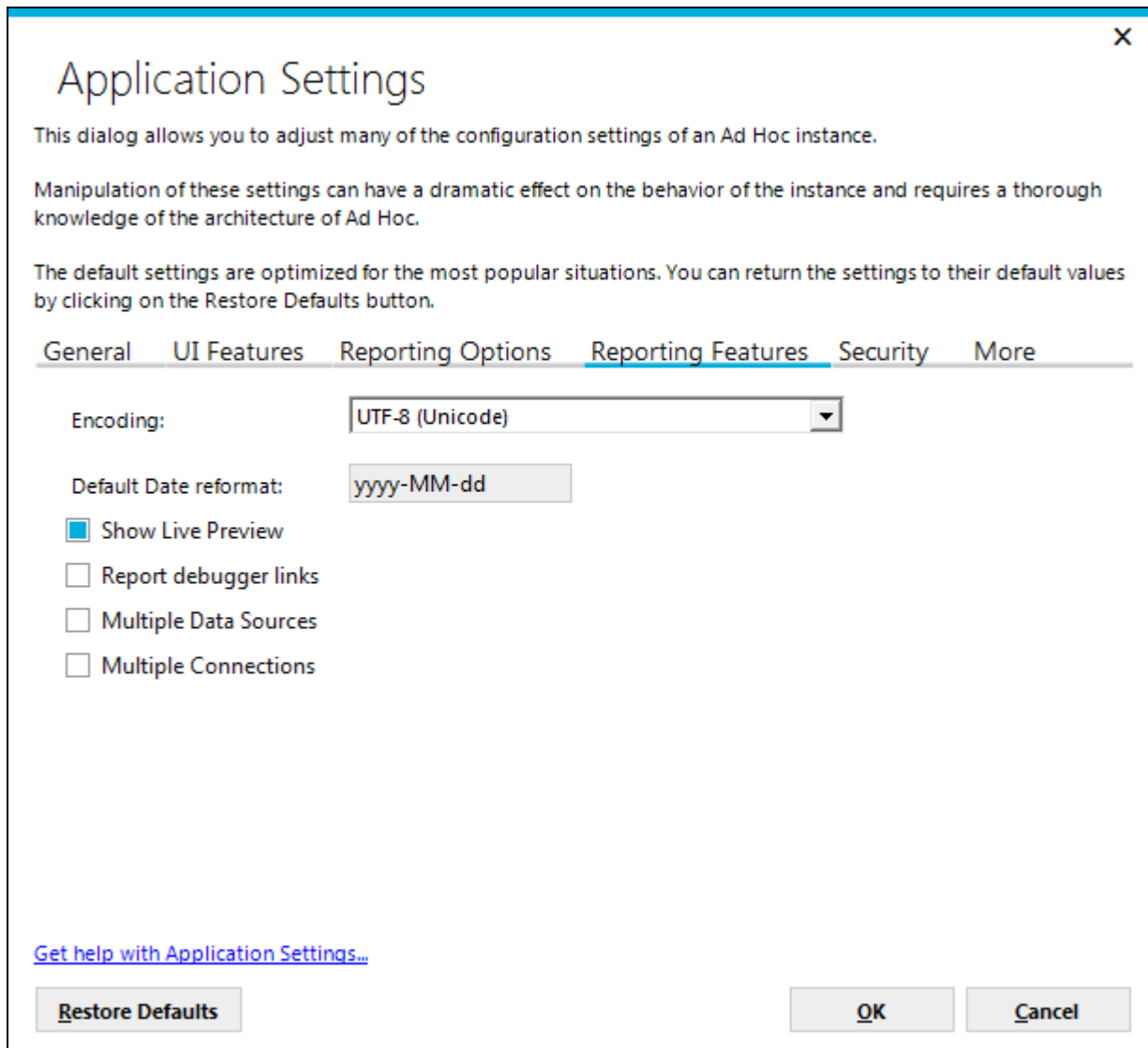
Click on the **Save** button to retain the information in the *_Settings.lgx* file of the active instance and return to the **Application Settings** dialog.

Note:

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

Reporting Features Tab

Clicking on 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 the report definition file.

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 based on browser settings.

The Live Preview feature may be enabled by checking the *Show Live Preview* option. 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 this page” link will be displayed at the bottom of all reports that are run. Clicking on the link in the report will present a debug log.

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.

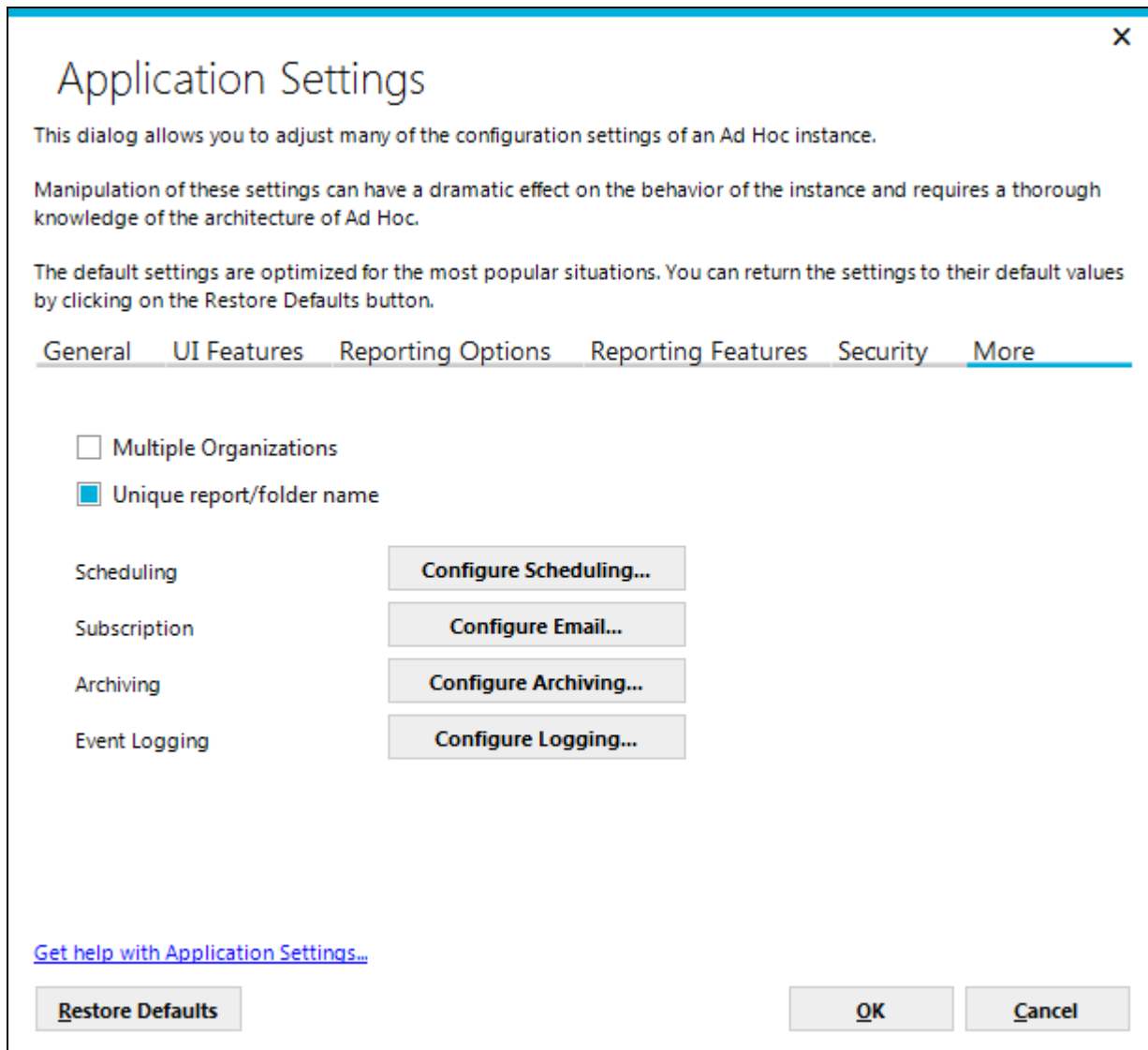
Multiple Connections enables the option to include data from different reporting databases in a report. In the Report Builder interface of Ad Hoc, the database filter will offer an “(All)” option. When the “(All)” option is selected during report creation, the end user is given the option to select data 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.

More Features Tab

Clicking on the More Features tab will display the following:



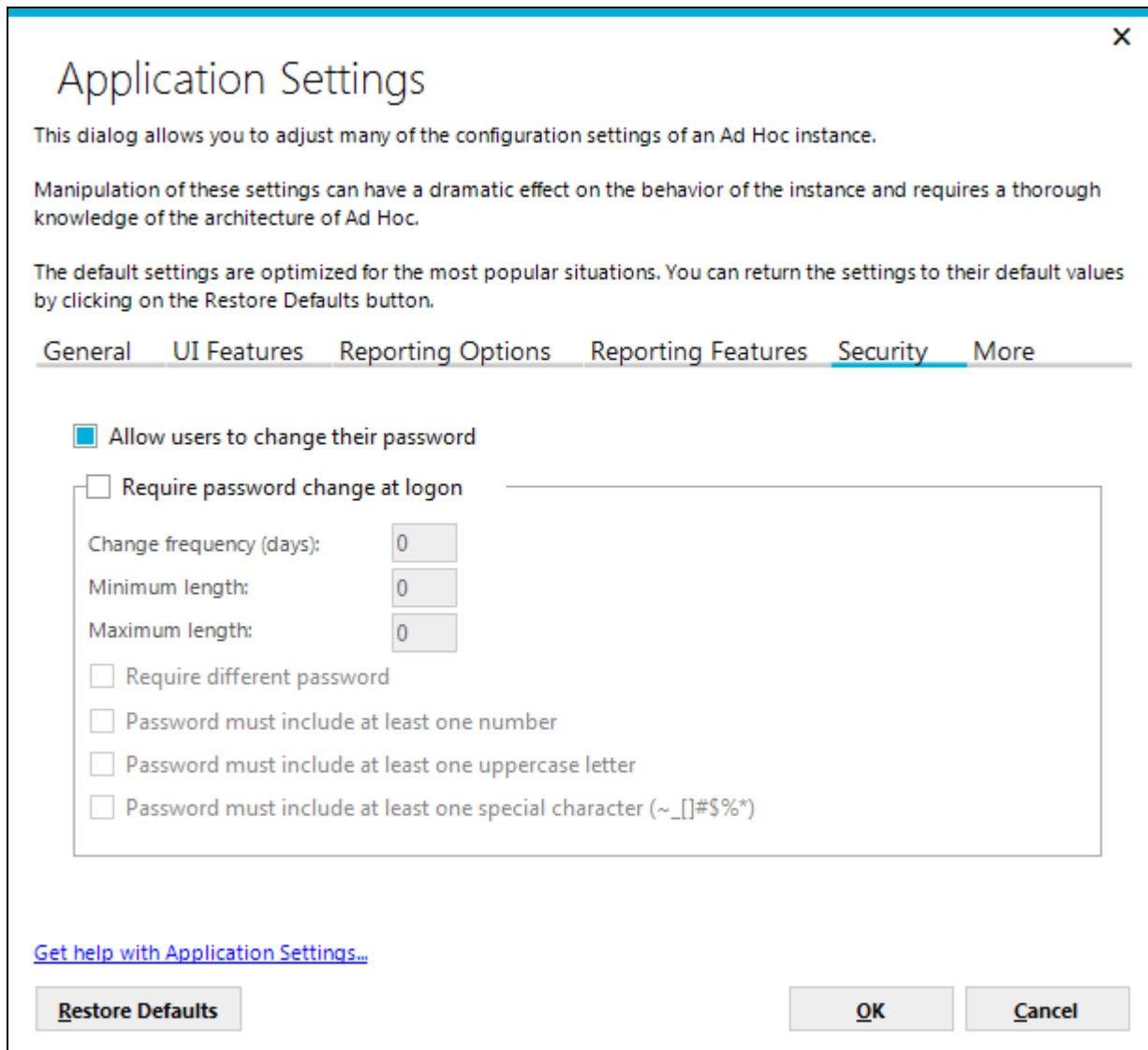
The *Multiple Organizations* checkbox allows the System Administrator to determine whether the user community for the instance should be divided into Organizations. Ad Hoc treats organizations like separate companies. Reports are not permitted to be shared across organizations. Every Ad Hoc user must be a member of one and only one organization.

The *Unique report/folder name* checkbox determines whether duplicate report and folder names are permitted in the instance. If this setting is enabled on an instance containing duplicate folders and/or reports, a dialog will be presented 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 Guide.

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.

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 for configuration information for an SMTP server.

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.

The **Configure Scheduling** dialog may be accessed by

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

The **Configure Scheduling** dialog will be displayed.

Configure Scheduling

Scheduler Service

This dialog allows you to select and configure the scheduling service and determine the database connections that will be permitted to schedule reports.

Scheduler method: Logi Scheduling Service Windows

Scheduler Account:

Password:

The Scheduler Account must have the right to add items in the Windows Task Scheduler.

Test Scheduler Settings...

Enable/Disable Scheduling for Database Connections

	Enable	Database Connections
	<input type="checkbox"/>	Northwind

[Get help configuring the Report Scheduler...](#)

OK **Cancel**

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 1) that it supports scheduling in a clustered environment and 2) 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 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 will change to

Configure Scheduling

Scheduler Service

This dialog allows you to select and configure the scheduling service and determine the database connections that will be permitted to schedule reports.

Scheduler method: Logi Scheduling Service Windows

Server Name: localhost

Password: myKey

Port Number: 56111

The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service.

Test Scheduler Settings...

Enable/Disable Scheduling for Database Connections

Enable	Database Connections
<input type="checkbox"/>	Northwind

[Get help configuring the Report Scheduler...](#)

OK Cancel

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*. Following is the typical XML content of that *_Settings.lgx* 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 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 on 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.*

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

Note:

*For information on how to install and configure the Logi Scheduler, see the online document **Introducing the Logi Scheduler for Ad Hoc**.*

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 reasons 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

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

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

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

The **Email Configuration** dialog will be displayed.

Email Settings

This dialog allows you to identify an SMTP server and configure access to it. You can also configure the email notifications for each reporting database.

Email Server Settings

[Edit Email Server Settings...](#)

Database Specific Settings

Database
Northwind

Email Messages | **Email Templates**

Subject:

To:

From:

CC:

BCC:

Use the following token where needed in the Subject template:

- Will be replaced with report name.

[Get help with Email Configuration...](#)

[Apply Changes](#)

[OK](#) [Cancel](#)

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 on the **Edit Email Server Settings** button. The **Email Server Settings** dialog will be displayed.

It is presumed that the System Administrator knows the SMTP server and configuration settings to complete the dialog. The SMTP server credentials must be sufficient to permit sending emails via relay.

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

Enter the “From” and “To” addresses and click on the **Send Message** button to verify the SMTP settings. Click on the **Close** button to dismiss the dialog.

The **OK** button will save the SMTP configuration settings and return to the **Email Configuration** dialog.

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 that records email information for the selected reporting database.

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.*

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

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

The *CC* and *BCC* attributes are not required. These must be valid email addresses. Multiple addresses must be separated a semi-colon or a comma.

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

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

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

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

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 may be accessed by

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

The **Configure Archiving** dialog will be displayed.

Enable	Database
<input checked="" type="checkbox"/>	Northwind

Archive Report Format:

Archive Folder:

Archive Web Path URL:

Hint: Should look something like "http://myserver/myarchive"

Auto Archive:

[Get help with Archiving...](#)

The **Configure Archiving** dialog allows the System Administrator to identify the reporting database, physical archive folder, the associated virtual directory, 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 on a row in the report database list. To select all report databases, click on the upper left corner of the list.

To enable/disable archiving for all reporting databases, click on 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 on the Browse button to either 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 pre-set and non-editable if the *Auto Archive* checkbox is enabled.

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

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

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

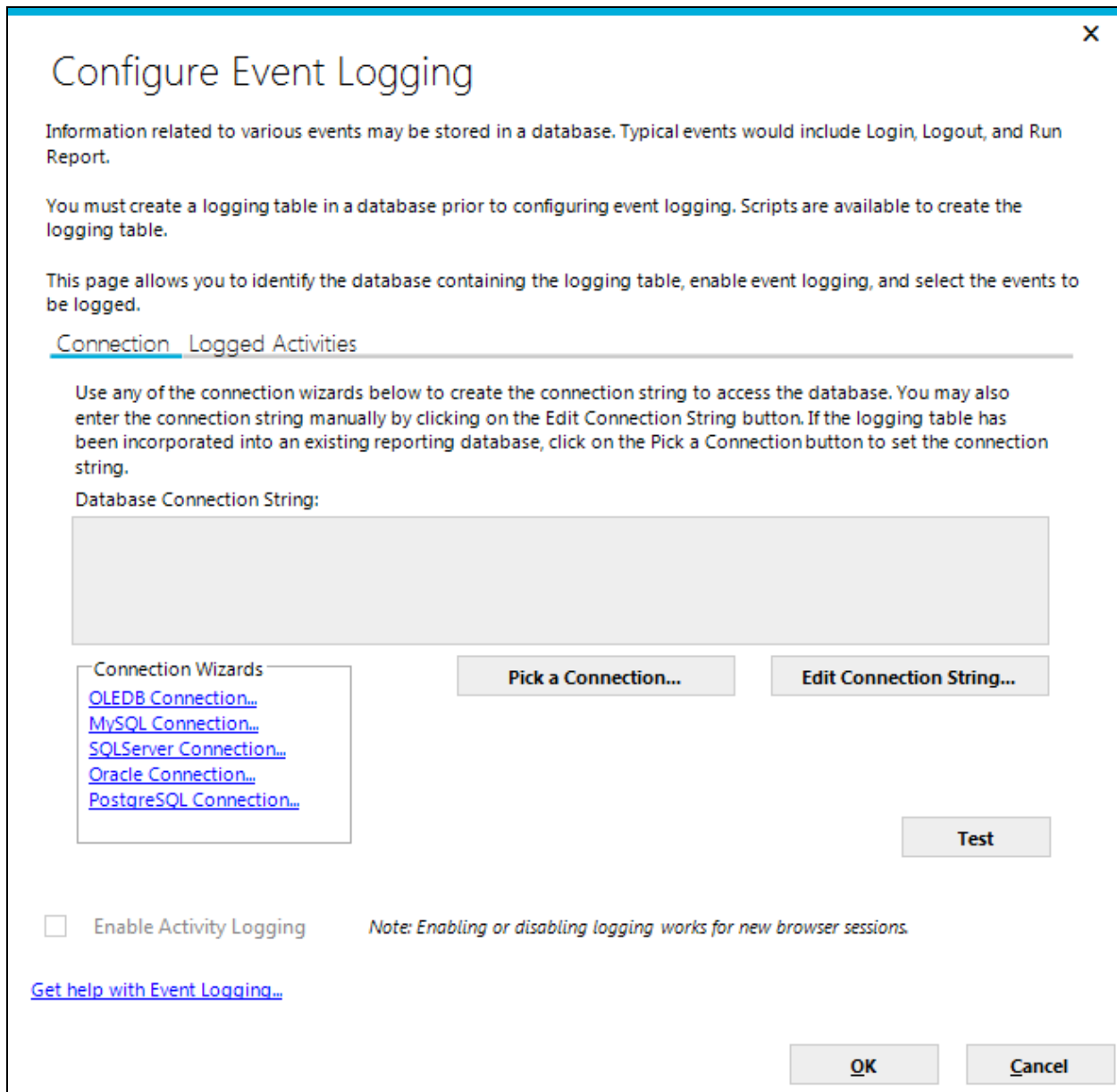
Ad Hoc permits the logging of key events into a database. Events include login, logout, running a report, creating a report, etc. Events are recorded for an Ad Hoc instance, across all databases connected to the instance. The System Administrator must 1) manually create a logging table (*AdHocLog*) in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

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

The Configure Event Logging dialog may be accessed by

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

The **Configure Event Logging** dialog will be displayed with the *Connection* tab selected initially.



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

- Use one of the *Connection Wizard* links
- Click on the **Edit Connection String** button and manually provide the connection string
- Click on the **Pick a Connection** button if the *AdHocLog* table was included in a database previously connected to the instance

Java -

The suite of available connection links may be different.

As always, click on the **Test** button to verify that the connection information supplied is correct. 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 with this checkbox.

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

Configure Event Logging ✕

Information related to various events may be stored in a database. Typical events would include Login, Logout, and Run Report.

You must create a logging table in a database prior to configuring event logging. Scripts are available to create the logging table.

This page allows you to identify the database containing the logging table, enable event logging, and select the events to be logged.

Connection Logged Activities

Action	Log
▶ Login	<input type="checkbox"/>
Logout	<input type="checkbox"/>
Create Report	<input type="checkbox"/>
Modify Report	<input type="checkbox"/>
Delete Report	<input type="checkbox"/>
Rename Report	<input type="checkbox"/>
Copy Report	<input type="checkbox"/>
Move Report	<input type="checkbox"/>
Schedule Report	<input type="checkbox"/>
Unschedule Report	<input type="checkbox"/>
Subscribe to Report	<input type="checkbox"/>

Logged Information for Login

- Action Name
- Action Timestamp
- Host IP Address
- Session Unique Identifier
- Username
- Group Name
- Application Code

* Click on the title of "Log" column to select/unselect all rows.

Enable Activity Logging *Note: Enabling or disabling logging works for new browser sessions.*

[Get help with Event Logging...](#)

OK
Cancel

Individual events may be enabled or disabled by clicking on 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* in the right frame.

Click on the **OK** button to record the settings and dismiss the dialog.

Note:

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

Note:

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

The following table shows what information is logged for each log action available:

	Logged Information														
Log Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	Username	Group Name	Affected User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affected
Login	✓	✓	✓	✓	✓	✓									
Logout	✓	✓	✓	✓	✓	✓								✓	
Create Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓			
Modify Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓			
Delete Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Rename Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Copy Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Move Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Schedule Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Unschedule Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Subscribe to Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Unsubscribe from Report	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓				
Batch Subscribe to Report	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				

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 such that the end user can create robust, accurate reports on the data.

Every reporting database must have:

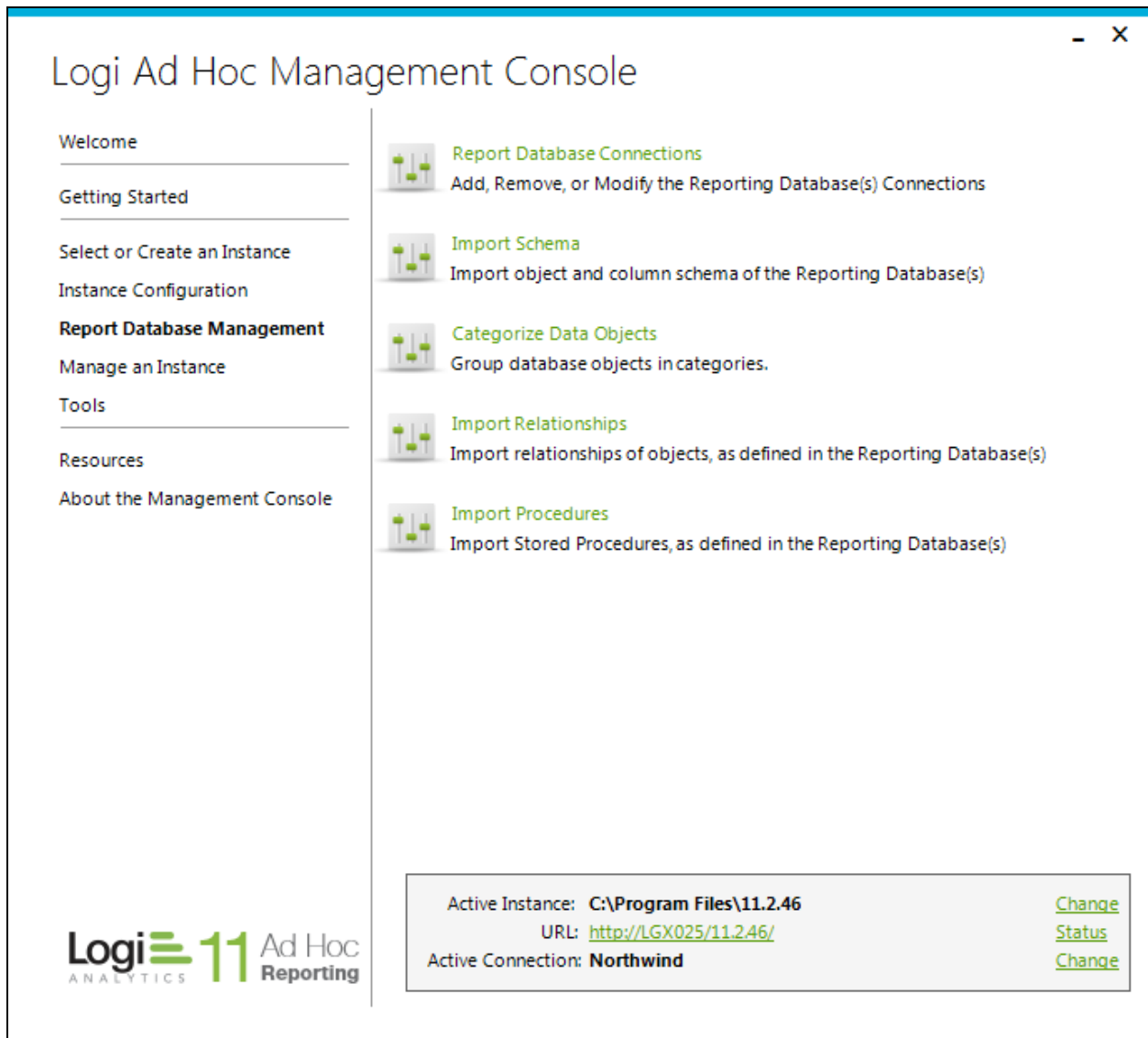
- A unique database name
- A connection string that identifies the database, provider, and access credentials
- All or some of the schema imported into the Ad Hoc metadata database
- User-friendly names for the objects and columns

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



The screenshot shows the Logi Ad Hoc Management Console interface. On the left is a navigation menu with the following items: Welcome, Getting Started, Select or Create an Instance, Instance Configuration, **Report Database Management**, Manage an Instance, Tools, Resources, and About the Management Console. The main content area displays five actions, each with a small icon of three vertical bars of varying heights:

- Report Database Connections**: Add, Remove, or Modify the Reporting Database(s) Connections
- Import Schema**: Import object and column schema of the Reporting Database(s)
- Categorize Data Objects**: Group database objects in categories.
- Import Relationships**: Import relationships of objects, as defined in the Reporting Database(s)
- Import Procedures**: Import Stored Procedures, as defined in the Reporting Database(s)

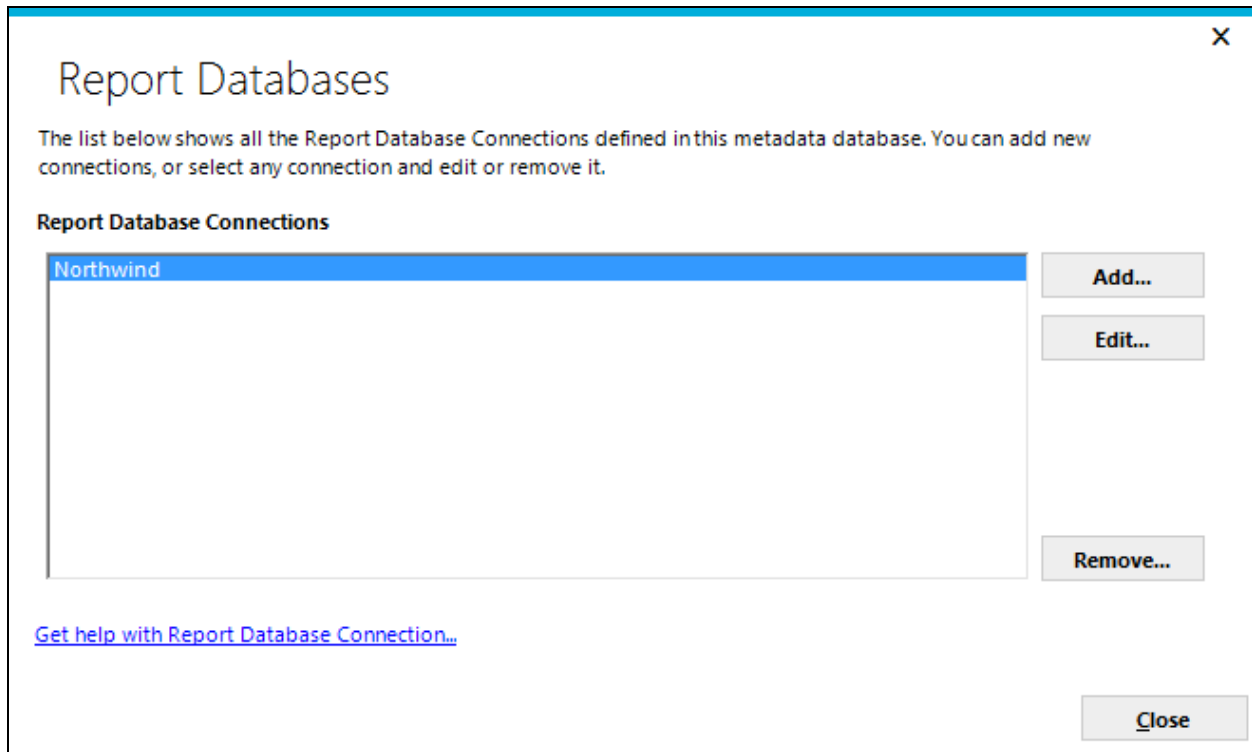
At the bottom right, a status box contains the following information:

- Active Instance: **C:\Program Files\11.2.46** [Change](#)
- URL: <http://LGX025/11.2.46/> [Status](#)
- Active Connection: **Northwind** [Change](#)

The Logi Analytics 11 Ad Hoc Reporting logo is visible in the bottom left corner of the console window.

Report Database Connections

To create and manage connections to reporting databases for an instance, click on the Report Database Connections action. A dialog with a list of existing reporting database connections will be presented.



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

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

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

Clicking on either the **Add** or **Edit** button will display the **Report Database Configuration** dialog.

Report Database Configuration

Create a connection to a database used as a source of data for your reports.

Enter a unique database label in the text box. Use any of the connection wizards below to create the connection string to access the database. You may also enter the connection string manually by clicking on the Edit Connection String button.

Once you have specified the connection string, it is highly recommended that you click on the Test button to verify that it works before clicking on the Next button.

Database Label:

Database Connection String

[OLEDB Connection...](#)
[Oracle Connection...](#)
[MySQL Connection...](#)
[SQL Server Connection...](#)
[PostgreSQL Connection...](#)

Command Timeout:

[Get help with Report Database Connection...](#)

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

The *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.

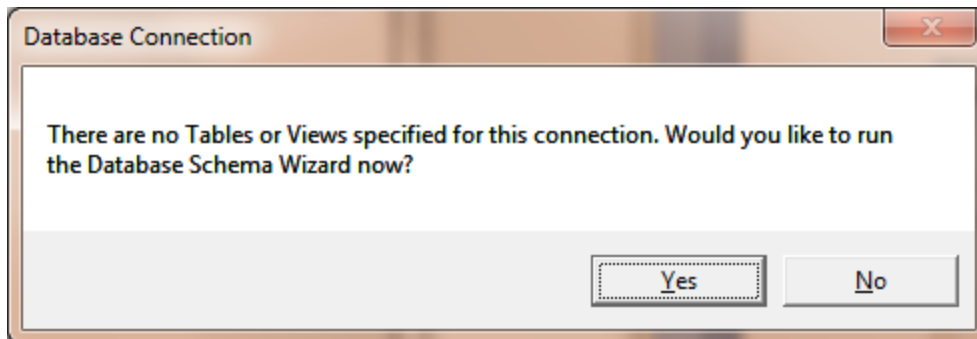
In addition to the *Connection Wizard* links, the connection string may be created and modified manually by clicking on the **Edit Connection String** button.

Note:

For Oracle connections, a **Use ANSI** checkbox will be presented. This checkbox determines the syntax generated to specify table relationships. If enabled, 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 **Use ANSI** option should be enabled.

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

Click on the **OK** button to save the information. If there is no schema information in the metadata database related to the reporting database, the following dialog will offer the opportunity to run the Import Schema wizard.

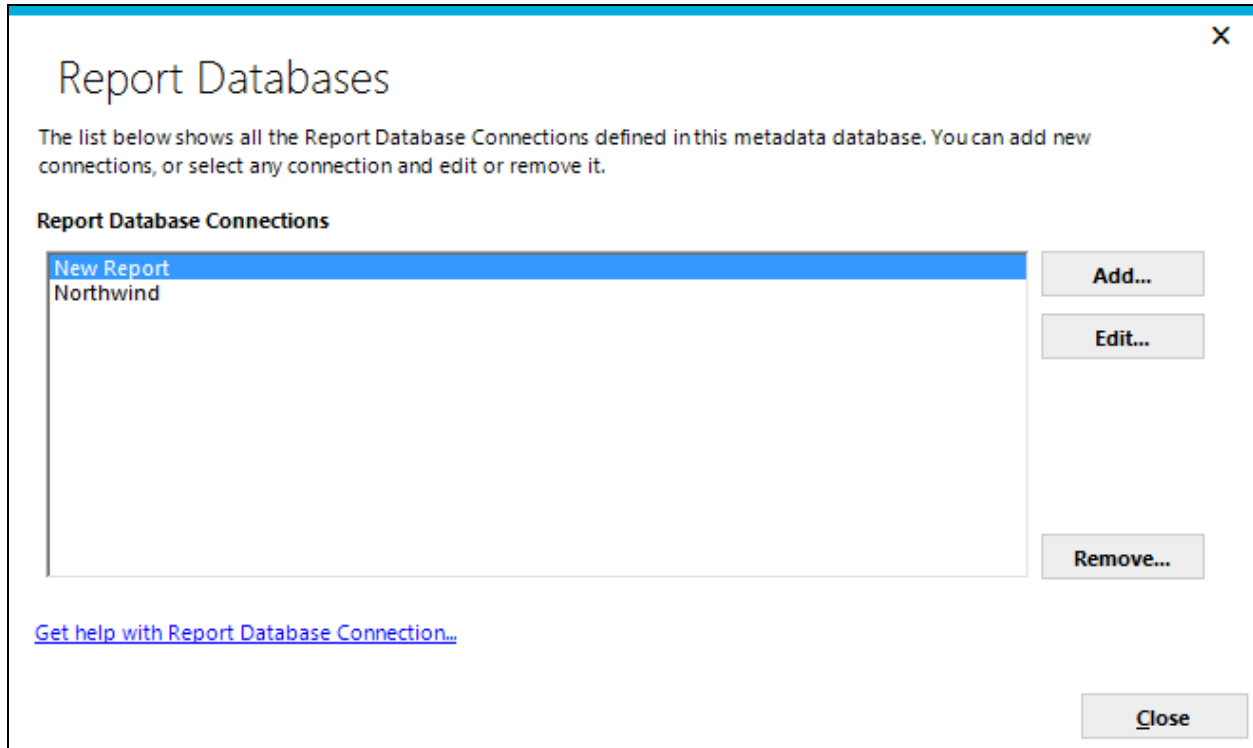


Clicking on the **Yes** button will launch the Import Schema wizard. Clicking on **No** will return to the Report Databases dialog and the list of existing connection strings.

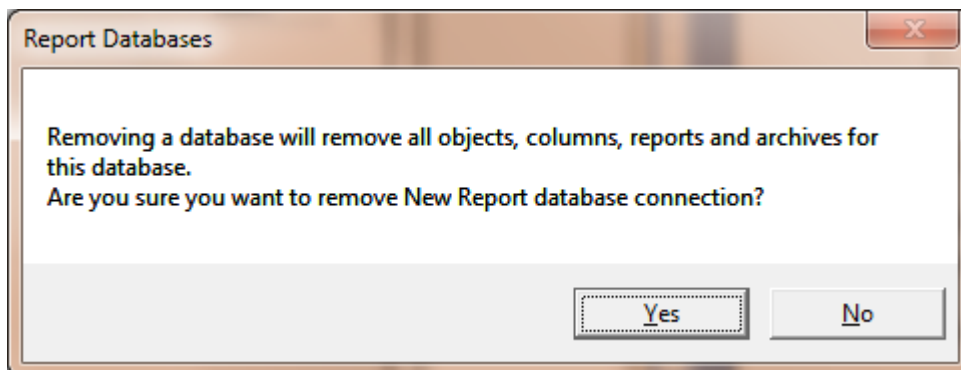
The **Report Databases** dialog may be dismissed by clicking the **Close** button.

Removing a Reporting Database Connection

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



By highlighting the “Reports Repository” connection and clicking on the **Remove** button, the following confirmation dialog will be displayed.



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

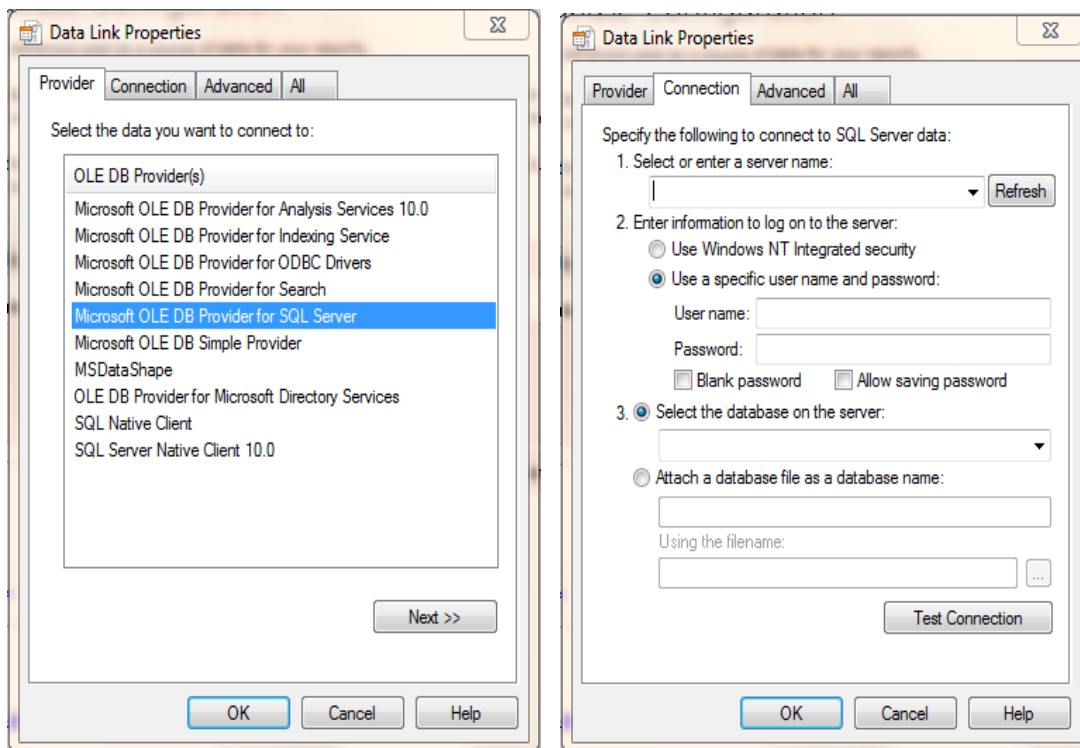
Click on the **No** button to cancel the **Remove** operation and return to the Report Databases dialog.

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 dialogs and brief descriptions of their expected usage.

OLEDB Connection

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



Oracle Connection

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

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

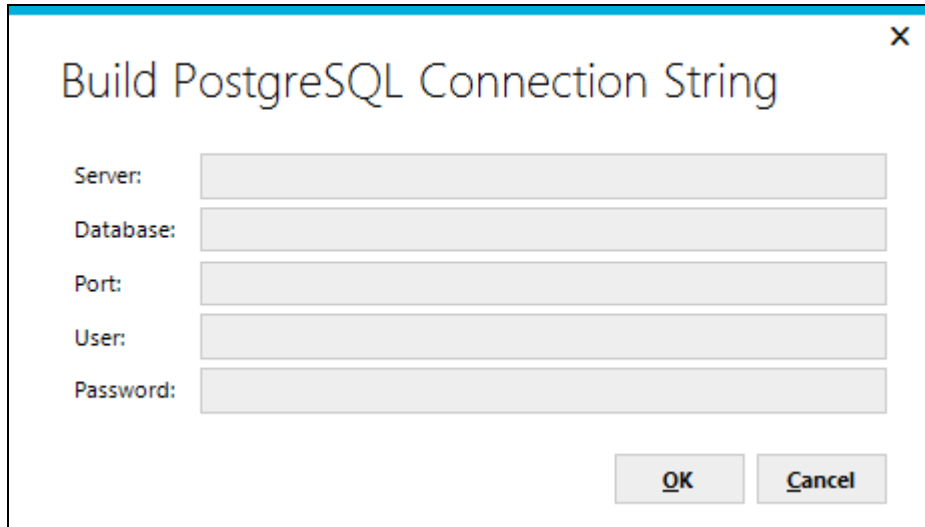
MySQL Connection

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

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

PostgreSQL Connection

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



The image shows a dialog box titled "Build PostgreSQL Connection String" with a close button (X) in the top right corner. The dialog contains five input fields, each with a label to its left: "Server:", "Database:", "Port:", "User:", and "Password:". Below the input fields are two buttons: "OK" and "Cancel".

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

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 dialogs will be presented 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 received:



No report database connection is currently active. Please select an existing connection as active or create a new connection and import the schema.

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

Import/Manage Objects and Columns

The **Object and Column Schema Import** dialog 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.

✕

Object and Column Schema Import

Determine the objects and columns that will be available for reporting in this instance. To make changes, select the objects or columns and click one of the action buttons below.

Objects

Object Type	Object Name	Object Changes
TABLE	Categories	None
TABLE	Customers	None
TABLE	Employees	None
TABLE	EmployeeTerritories	None
VIEW	Invoices	None
▶ TABLE	Order Details	None
TABLE	Orders	None
TABLE	Products	None

Columns

Column Name	Data Type	Column Changes
▶ OrderID	Integer	None
ProductID	Integer	None
UnitPrice	Currency	None
Quantity	SmallInt	None
Discount	Double	None

◀
▶

Add Selected
Remove Selected
Repair Selected
Clear Changes

Both
 Source only
 Different
 Metadata database only

[Get help with Importing Database Object Schematics...](#)

Previous

Next

Cancel

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.

Highlighting can be done by

- clicking on a row in the grid,
- [CTRL]-clicking one or more rows,
- [Shift][CTRL]-clicking blocks of rows,
- Hold the mouse key down and dragging it over the rows,
- Clicking on the block in the upper left corner of the grid to highlight 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 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, the typical steps would be:

- 1) Click on the box in the upper left corner of the *Objects* grid to highlight all of the objects
- 2) Click on the **Add Selected** button to set the actions to be performed on the objects and columns
- 3) Click on the **Next** button to continue to the next dialog where the object names and descriptions will be set

User-friendly Object Names and Descriptions

The **Object Names and Descriptions** dialog is presented. Creation of *Friendly Labels* is required as part of the configuration process. Specifying object *Descriptions* is optional.

✕

Object Names and Descriptions

Data objects must be given user-friendly names. The names may be automatically created by highlighting the data objects and clicking on the Auto-generate Names button. You may also enter the names manually or copy the grid contents to another tool, make the changes, and paste the results back.

You have the option of adding data object descriptions and hiding data objects that will not be directly used for reporting.

Initially, all of the data objects are presented. You may filter so that only certain data object will be displayed.

Filter: Options... Clear

	Object Name	User-friendly Name	Description	Hid
▶	Categories	Categories		<input type="checkbox"/>
	Customers	Customers		<input type="checkbox"/>
	Employees	Employees		<input type="checkbox"/>
	EmployeeTerritories	Employee Territories		<input type="checkbox"/>
	Order Details	Order Details		<input type="checkbox"/>
	Orders	Orders		<input type="checkbox"/>
	Products	Products		<input type="checkbox"/>
	Region	Region		<input type="checkbox"/>
	Shippers	Shippers		<input type="checkbox"/>
	Suppliers	Suppliers		<input type="checkbox"/>
	Territories	Territories		<input type="checkbox"/>

Auto-generate Names...
Clear Changes

[Get help with Importing Database Object Schematics...](#)

Previous
Next
Cancel

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

The dialog also provides a mechanism to generate the *Friendly Label* for the highlighted objects. Click on the upper left corner of the grid to highlight all of the objects. Click on the **Auto-generate Names** button to let the MC set the names automatically.

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

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

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

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

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

Note:

The dialog 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 on the **Options** button to set the filter criteria.

Click on the **Clear** button 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 is presented. Creation of *Friendly Labels* is required as part of the configuration process. Specifying column *Descriptions* is optional.

Column Names and Descriptions

Columns must be given user-friendly names. The names may be automatically created by highlighting the columns and clicking on the Auto-generate Names button. You may also enter the names manually or copy the grid contents to another tool, make the changes, and paste the results back.

Initially, the columns associated with all of the data objects are presented. You may click on any data object in the top panel to display only the columns related to that data object.

You have the option of adding column descriptions and hiding columns that will not be directly used for reporting.

Filter: **Options...** **Clear**

- All Objects
 - Categories
 - Customers
 - Employees
 - EmployeeTerritories
 - Order Details

Column Name	User-friendly Name	Description	Hide Column	Object Name
CategoryID	Category ID		<input type="checkbox"/>	Categories
CategoryName	Category Name		<input type="checkbox"/>	Categories
Description	Description		<input type="checkbox"/>	Categories
CustomerID	Customer ID		<input type="checkbox"/>	Customers
CompanyName	Company Name		<input type="checkbox"/>	Customers
ContactName	Contact Name		<input type="checkbox"/>	Customers
ContactTitle	Contact Title		<input type="checkbox"/>	Customers
Address	Address		<input type="checkbox"/>	Customers

Auto-generate Names... **Clear Changes**

[Get help with Importing Database Object Schematics...](#)

Previous **Next** **Cancel**

Friendly Labels and *Descriptions* may be manually added by entering information in the appropriate column in the grid. Every column must have a *Friendly Label*. Columns may also be hidden from end-users by checking the related *Hide* checkboxes.

For manual entry of Friendly Labels 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 on the All Objects label in the top panel.

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

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

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

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

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

- 1) Click on All Objects to populate the lower panel with all columns

- 2) Click on the box in the upper left corner of the grid in the bottom panel to highlight all of the columns
- 3) Click on the **Auto-generate Names** button to show the automated naming options
- 4) Click on the **OK** button
- 5) Click on the **Next** button

Note:

The dialog 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 on the **Options** button to set the filter criteria.

Click on the **Clear** button to reset the Filter text box and show all columns in the grid related to the highlighted object.

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

Categorize Data Objects

Data objects may be grouped into *Categories*. Although grouping objects into categories is not generally required, for installations with large a number of data objects it is highly recommended. 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 **Categorizing Objects** dialog may be launched by:

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

The following dialog will be presented.

X

Categorize Data Objects

Data objects may be grouped into logical categories to assist end users in selecting data for their reports. This is an optional task. However, for databases with a large number of data objects, categorizing the data objects is highly recommended.

Click on the Add button to create a category.

Select one or more data objects and drag them to a category. Unassigned data objects will display in red. Data objects can be assigned to more than one category.

Categories

Add
Modify
Remove

..... All Categories

Available Objects

Assigned
 Unassigned

	Object Name
▶	Categories
	Customers
	Employees
	EmployeeTerritories
	Order Details
	Orders
	Products
	Region
	Shippers
	Suppliers
	Territories

[Get help with Categorizing Data Objects...](#)

Previous
Next
Cancel

Note:

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

The **Categorizing Objects** dialog 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 presented to manage the categories.

- **Add** will present a dialog to enter the category name and description. Click on the OK button 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 is as follows:

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

Note:

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

Import Relationships

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

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

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

The following dialog will be presented.

✕

Import Relationships

This page allows you to determine which relationships will be available for reporting.

Select the join type(s), highlight the relationships to manage and click on one of the action buttons.

It is strongly recommended that only one type of relationship be created between two objects. Please consult the documentation for more information on this topic.

Inner Join
 Left Outer Join
 Right Outer Join

	Primary Table	Join Type	Foreign Table	Relation Changes
▶	Customers	Inner Join	Orders	None
	Employees	Inner Join	Orders	None
	Shippers	Inner Join	Orders	None
	Categories	Inner Join	Products	None
	Suppliers	Inner Join	Products	None
	Orders	Inner Join	Order Details	None
	Products	Inner Join	Order Details	None
	Region	Inner Join	Territories	None
	Employees	Inner Join	EmployeeTerritories	None

	Primary Column	Foreign Column	Change
▶	CustomerID	CustomerID	None

Add Selected
Remove Selected
Repair Selected
Clear Changes

■ Both
■ Source only
■ Different
■ Metadata database only

[Get help with importing Relationships...](#)

Previous
Next
Cancel

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

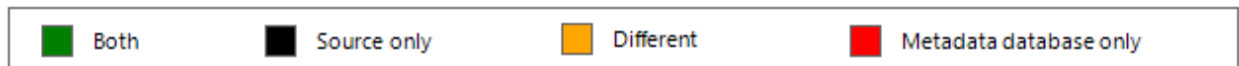
The list of data object relationships is presented in the top grid. The grid rows may be sorted by clicking on any column header.

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 presented in the dialog:

- **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 on the **Next** button to display the **Relationship Names and Descriptions** dialog.

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

- 1) Click on the required filter checkboxes. Most System Administrators select the **Inner Join** and **Reverse Relations** filters.
- 2) Click on the upper left corner box of the relationships grid to highlight all of the relationships
- 3) Click on the **Add Selected** button to set the action
- 4) Click on the **Next** button to display the **Relationship Names and Descriptions** dialog.

✕

Relationship Names and Descriptions

Relationships must be given user-friendly names. The names may be automatically created by highlighting the relationships and clicking on the Auto-generate Names button. You may also enter the names manually or copy the grid contents to another tool, make the changes, and paste the results back.

You have the option of manually entering descriptions for the relationships.

Filter: Options... Clear

	Primary Table	Join Type	Foreign Table	User-friendly Name	Relation Description
▶	Customers	Inne...	Orders		
	Employees	Inne...	Orders		
	Shippers	Inne...	Orders		
	Categories	Inne...	Products		
	Suppliers	Inne...	Products		
	Orders	Inne...	Order Details		
	Products	Inne...	Order Details		
	Region	Inne...	Territories		
	Employees	Inne...	EmployeeTerritories		
	Territories	Inne...	EmployeeTerritories		
	Employees	Inne...	Employees		

	Primary Column	Foreign Column
▶	CustomerID	CustomerID

Auto-generate Names...
Clear Changes

[Get help with importing Relationships...](#)

Previous
Next
Cancel

Relationships are required to have a *Friendly Label* and may optionally have a *Description*.

The *Friendly Labels* and *Descriptions* may be entered manually in the grid. An option to automatically generate the *Friendly Labels* according to specific rules is presented by highlighting rows in the grid and clicking on the **Auto-generate Names** button.

The following dialog is presented:

Auto-generate Friendly names

Please select your preferred method for generating friendly names:

For left joins use:

Primary table Friend -> Foreign table Frien

For inner joins use:

Primary table Friend - Foreign table Frien

For right joins use:

Primary table Friend <- Foreign table Frien

OK Cancel

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 is:

- 1) Highlight all relationships by clicking on the upper left corner of the grid
- 2) Click on the **Auto-generate Names** button
- 3) Click on **OK**

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

Note:

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

Note:

Sybase foreign key relations will not be displayed. Only the join relations for Sybase will be displayed.

Note:

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

Tools

Report Management

The **Report Management** utility is designed to allow the System Administrator to rectify various problems that can crop up in applications that require the synchronization of records in a database to files in a file system. 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, and relationships included in the report, location, and a status. Typically, the xml defining a report is stored in files in the `_Definitions/_Reports` folder in the instance.

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.

Logi Ad Hoc Reporting - Report Management

Report Management

Use the filters below to include/exclude a class of reports. It is recommended that you remove any orphaned reports and rebuild broken reports. Rebuilding broken reports many times is the best way to repair them.

Definition only
 Metadata only
 Broken
 Proper

Select	Report Name	Owner	Folder
<input checked="" type="checkbox"/>	Categories	Ad Hoc End User	Ad Hoc End User\
<input type="checkbox"/>	Categories / Products	Ad Hoc End User	Ad Hoc End User\
<input type="checkbox"/>	Crosstab	Admin	Admin\
<input type="checkbox"/>	Customer Orders	Admin	Admin\
<input type="checkbox"/>	Heat Map	Admin	Admin\
<input type="checkbox"/>	Heatmap II	Admin	Shared\Marketing Reports\
<input type="checkbox"/>	Product Summary	Admin	Shared\Marketing Reports\

Definition only (orphan)
 Metadata database only (orphan)
 Broken
 Proper

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



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 in 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 to exercise the utility are:

- 1) Highlight report(s)
- 2) Click on either the Remove or Rebuild action buttons
- 3) Review the resulting report

Remove Button – clicking this button will remove the highlighted reports. For reports that are “orphans”, only existing 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.

Filtering the Report List

Reports may 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.

Definition only Metadata only Broken Proper

As an example, a list of “Broken” reports will be presented by unchecking all of the report categories except “Broken”.

Publish Managed Reports

“Publishing” reports means to make Logi Info reports (also known as Managed 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 report definition file and may include:

- **_DataXMLs** - XML data files
- **_Definitions** - Report, Process and Template definition files
- **_Images** - GIF, JPEG, BMP, PNG, WMF, XBM and ART image files
- **_IncHTMLs** - HTML files
- **_Scripts** - VBScript and JavaScript files
- **_StyleSheets** - Cascading Style Sheet files
- **_Templates** - Adobe PDF and Microsoft Excel template files

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

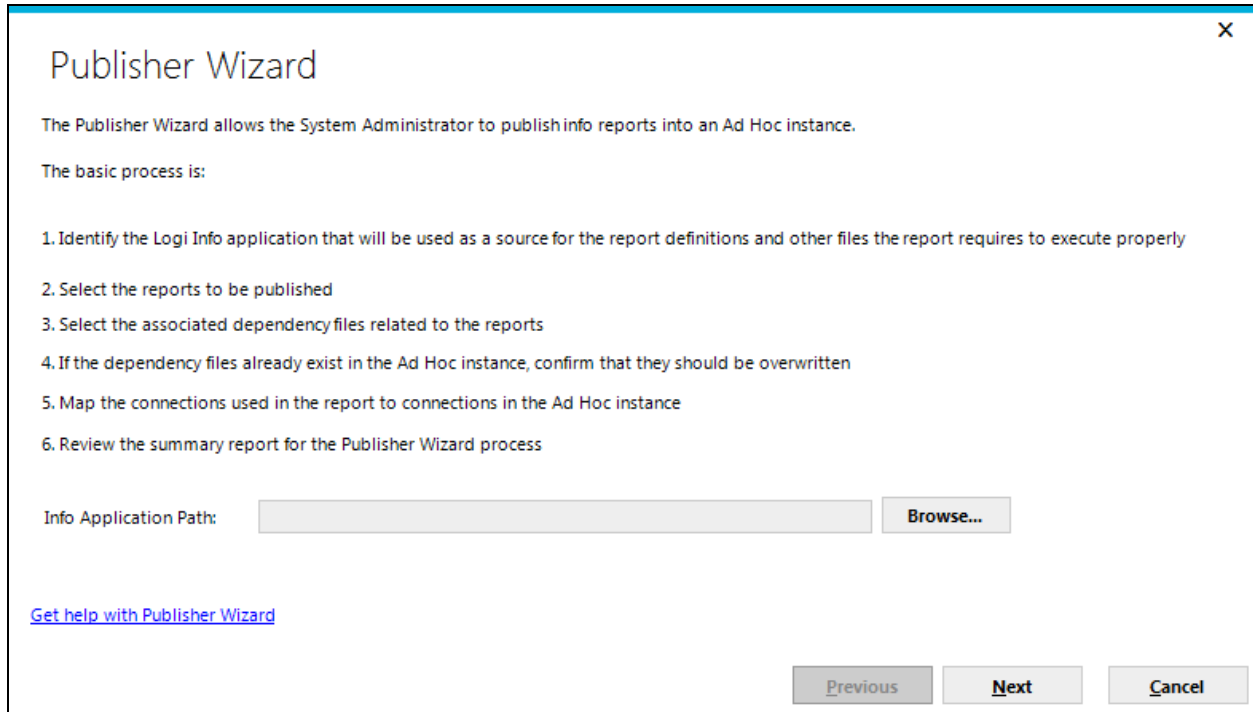
Note:

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 upon data from a database. Identification of the database and the credentials necessary to access the data are defined in a <Connection> element in the **_Settings.lgx** file. Both Info and Ad Hoc applications rely on the <Connection> elements. One of the key dialogs in the Publisher Wizard allows the System Administrator to either map the requisite connections for the reports to their Ad Hoc equivalent or to copy the existing Info connection into the Ad Hoc **_Settings.lgx** file.

Running the Publisher Wizard

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



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

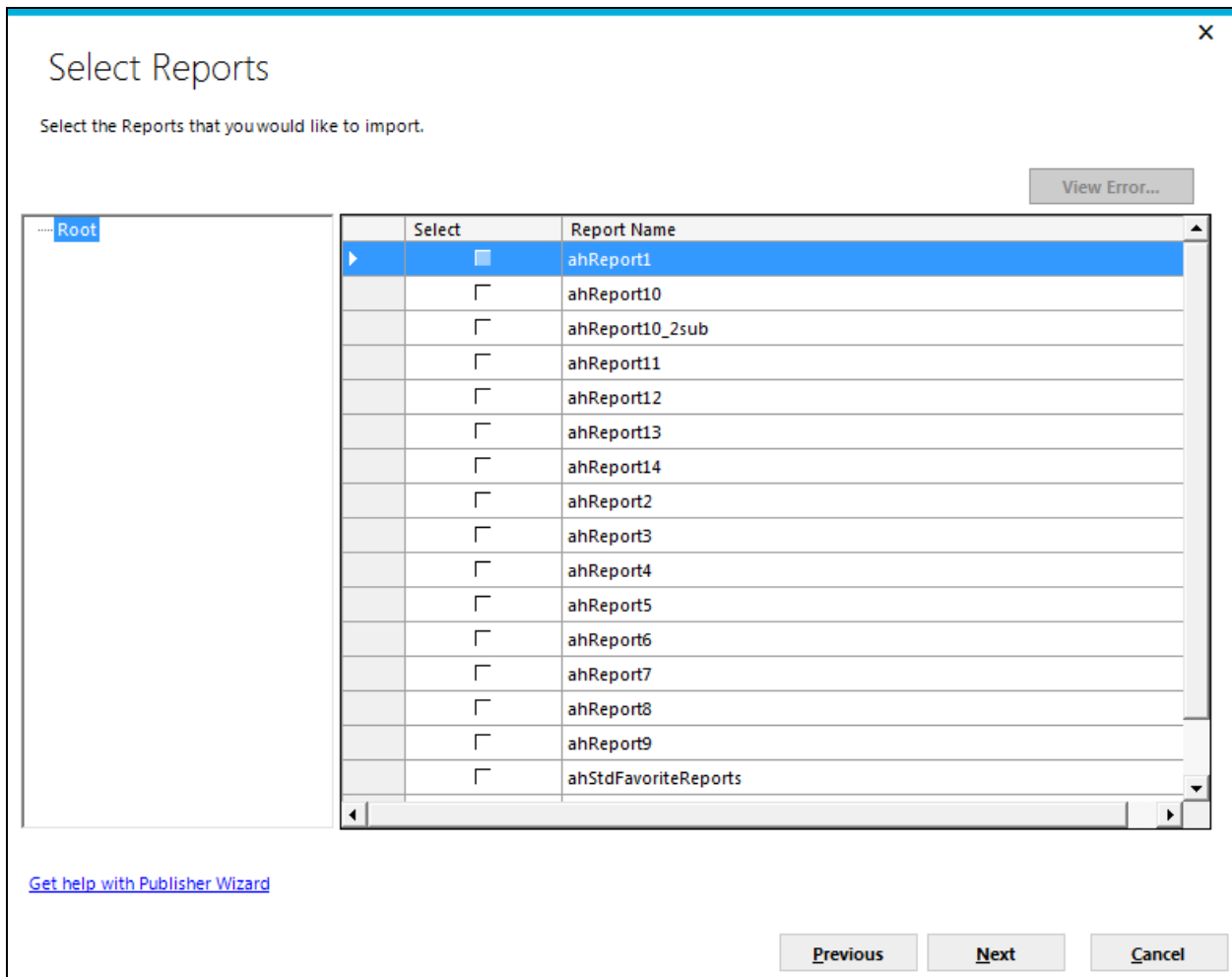
Click on the **Browse** button to identify an Info (Managed Reporting) application.

Click on the **Next** button to present a dialog that will allow the selection of reports to publish 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 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

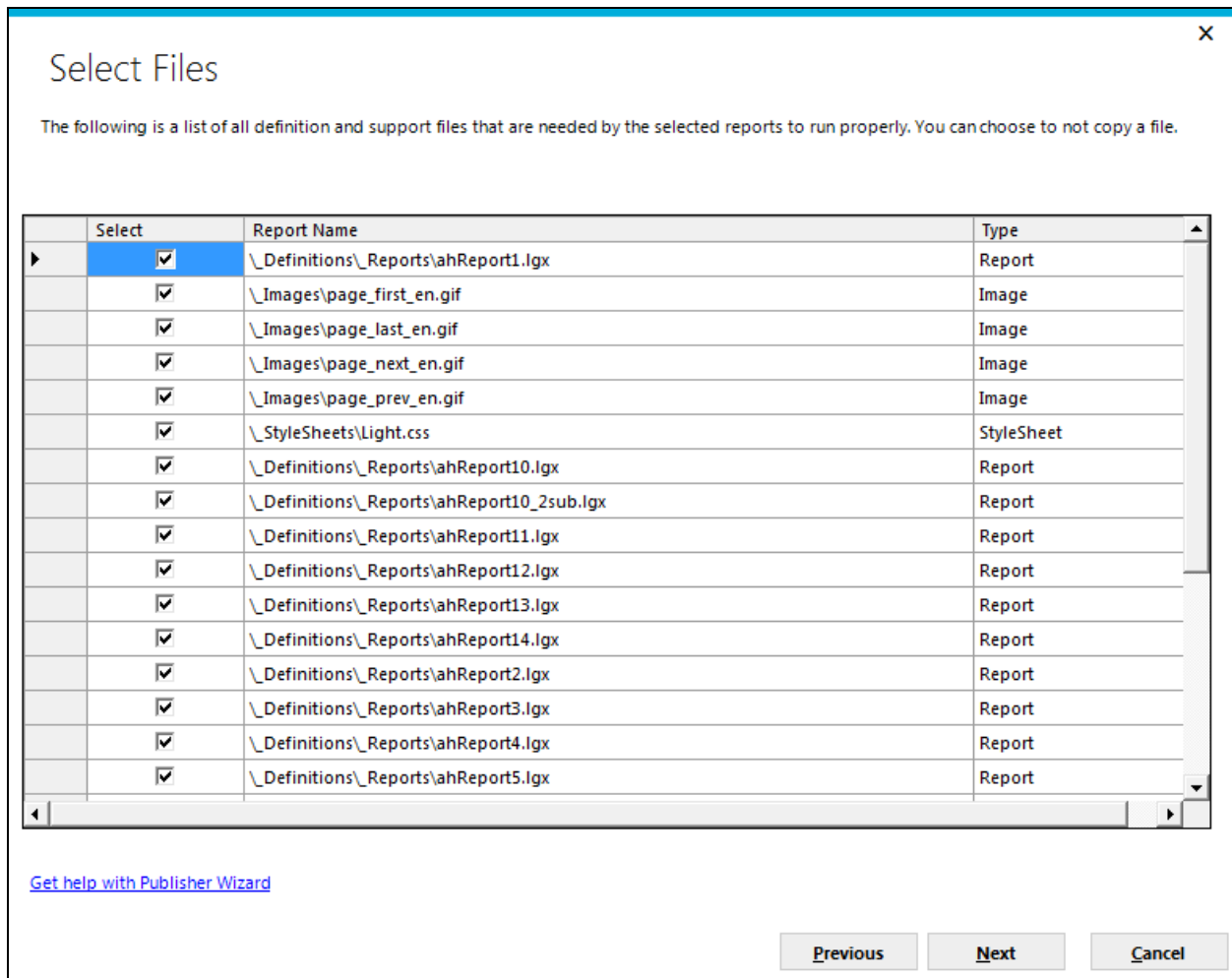


The left pane will identify the folder structure of the Info instance relevant to the report repository. Click on a folder in the left pane to display the list of reports in the right pane contained in the folder.

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

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

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

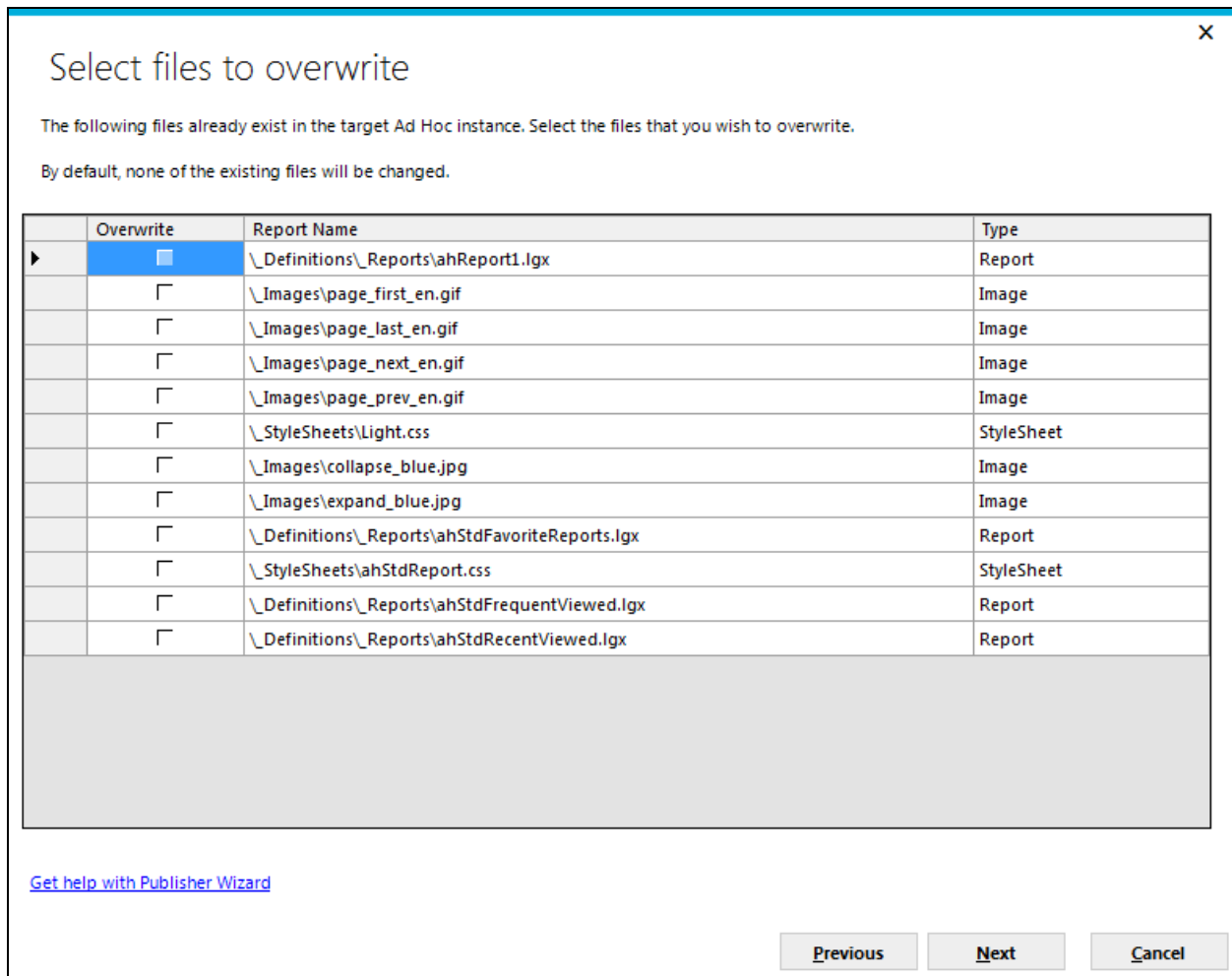


The System Administrator should review the list and determine which files should be copied from the Info application to the Ad Hoc application.

Click on the **Select** checkbox (checked by default) to identify the files to copy. Click on the **Select** column header to select / de-select all of the files in the list.

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

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

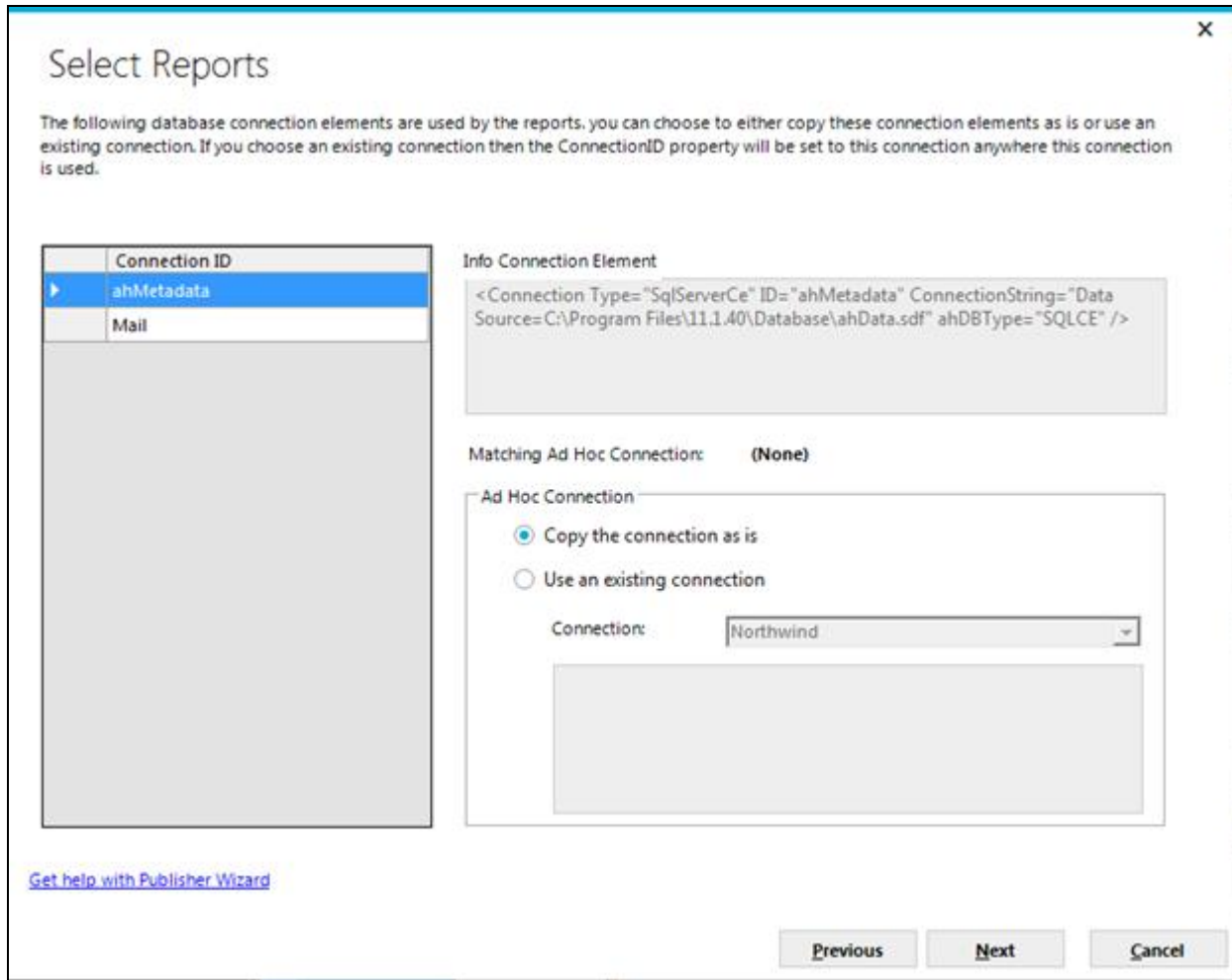


Click on the **Overwrite** checkbox to indicate that the corresponding Ad Hoc application file should be overwritten by the file from the Info application to support the Info reports.

Click on the **Overwrite** column header to select / de-select all of the files.

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

The **Map Reporting Database Connections** dialog 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 may 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**'s of all of the Info *Connection* elements used by the selected reports. As each **ID** is highlighted, the information on the right side of the dialog 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 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.

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

Each Info connection must be represented 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 on the **Next** button to complete the **Publisher Wizard** functions. The **Finish** dialog will be presented.

The **Finish** dialog 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*.

Note:

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.

Notes:

- 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

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.

An overview of the synchronization process would be:

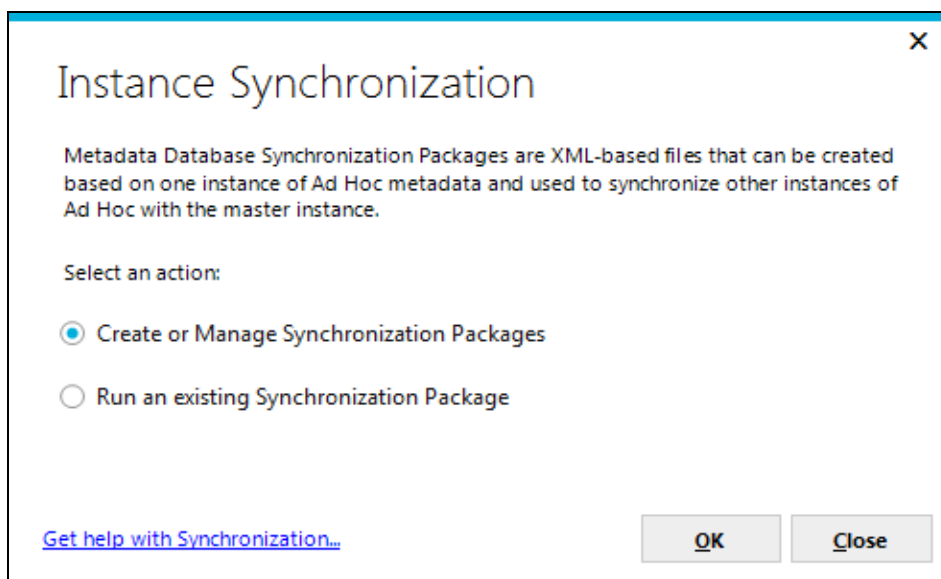
- Using the Management Console, select the source instance of Ad Hoc
- Create a synchronization package of the required items (metadata, reports, etc.) from the source instance
- Select the target instance of Ad Hoc and active connection
- Apply the synchronization package to the target instance

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

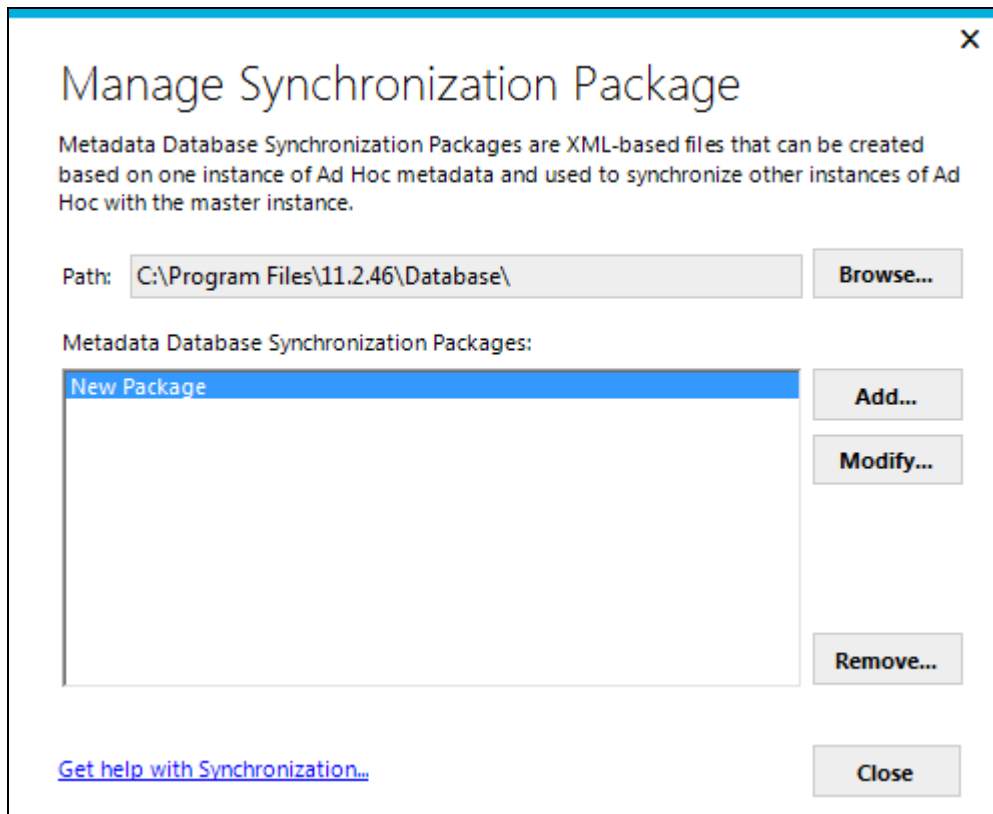
To create a synchronization package, click on the **Tools** action group and the **Synchronize** action. The following **Instance Synchronization** dialog will be presented:



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 on the **Advanced View** link and the **Settings** link.

Click on the *Create or Manage Synchronization Packages* option and click the **OK** button to display the **Manage Synchronization Packages** dialog.



As an overview, the typical progression for the creation of a synchronization package is to:

- 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, using either the “Simple” or “Advanced” view and click on the **Next** button
- 3) Review the Package Definition. Items are categorized and presented in a tree structure. Synchronized categories of items are listed alphabetically. Each category of item can be expanded to review the individual items. Options requested for any level of the tree are presented in parenthesis.

- 4) Make any adjustments necessary to achieve the desired result by clicking on the **Previous** button
- 5) Save the synchronization package file by clicking on the **Save** button
- 6) The creation of a synchronization package can be terminated at any time by clicking on the **Cancel** button

From the **Manage Synchronization Package** dialog, synchronization packages may be added, modified and removed. The *Path* field identifies the storage location of the synchronization packages. It will default to the *Database* folder of the active instance. As a suggestion, 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 on the **Browse** button to select a different location for the synchronization package(s).

To create a new synchronization package, click on the **Add** button.

To modify an existing synchronization package, highlight the file in the list and click on the **Modify** button. The button is enabled when a file is highlighted.

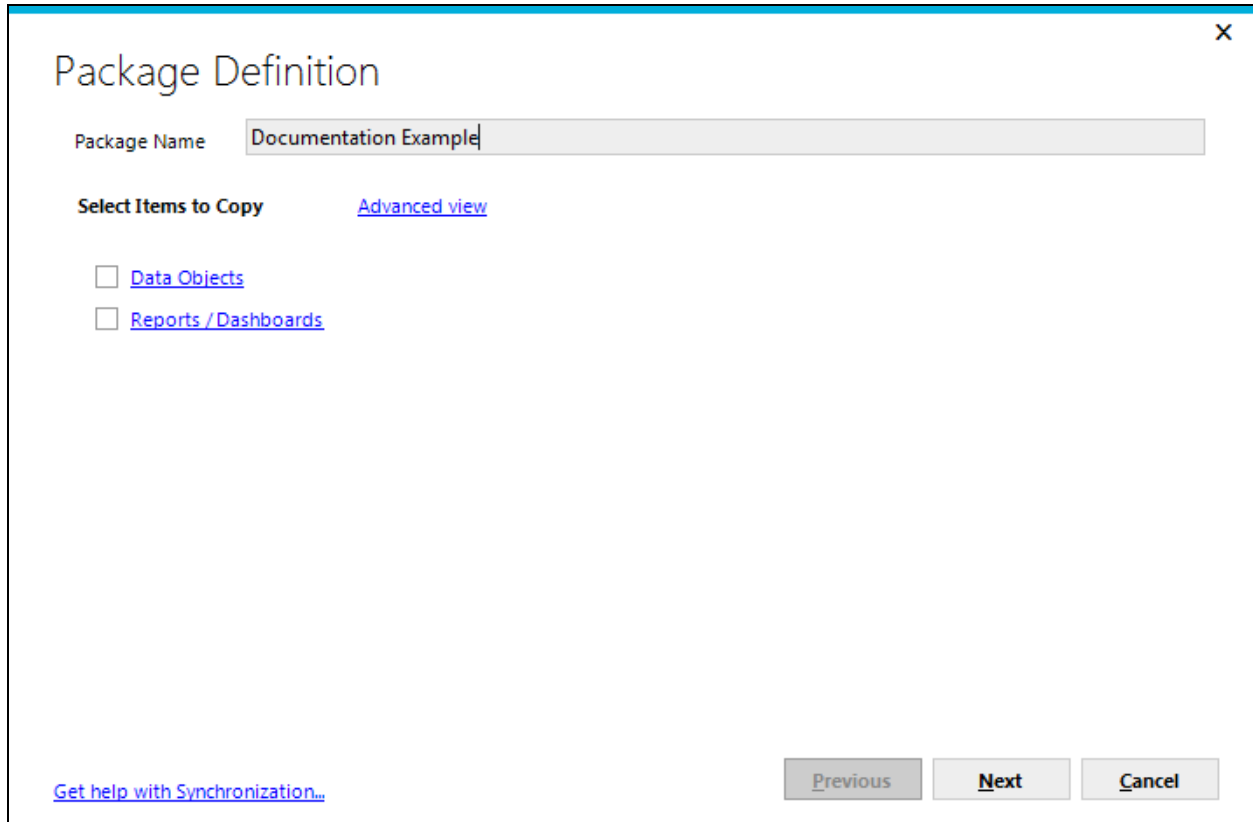
To remove an existing synchronization package, highlight the file in the list and click on the **Remove** button. The button is enabled when a file is highlighted. A confirmation dialog will be presented prior to removing the file.

Click on the **Close** button to dismiss the **Manage Synchronization Packages** dialog.

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 the **Add** (or **Modify**) buttons, the **Metadata Database Synchronization Settings** dialog is presented.



The screenshot shows a dialog box titled "Package Definition" with a close button (X) in the top right corner. The "Package Name" field contains the text "Documentation Example". Below this, there is a section titled "Select Items to Copy" with a link for "Advanced view". Two checkboxes are listed: "Data Objects" and "Reports / Dashboards", both of which are currently unchecked. At the bottom left, there is a link "Get help with Synchronization...". At the bottom right, there are three buttons: "Previous", "Next", and "Cancel".

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 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 enables 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.

Package Definition

Package Name:

Select Items to Copy [Advanced view](#)

- [Data Objects](#)
- [Reports / Dashboards](#)

[Get help with Synchronization...](#)

Package Definition

Package Name:

Select Items to Copy [Simple view](#)

<p>Application Items</p> <ul style="list-style-type: none">Settings<input type="checkbox"/> Permissions<input type="checkbox"/> Presentation Styles<input type="checkbox"/> Data Formats<input type="checkbox"/> Session Parameters<input type="checkbox"/> Roles	<p>Northwind Database Connection</p> <ul style="list-style-type: none"><input type="checkbox"/> Categories<input checked="" type="checkbox"/> Data Objects<input checked="" type="checkbox"/> Fixed Parameters<input checked="" type="checkbox"/> Relationships<input checked="" type="checkbox"/> Cascading Filters
<p>Default Organization</p> <ul style="list-style-type: none"><input type="checkbox"/> Organization Session Parameters<input type="checkbox"/> Users	<p>Content Items</p> <ul style="list-style-type: none"><input type="checkbox"/> Folders<input type="checkbox"/> Reports / Dashboards

[Get help with Synchronization...](#)

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**, enabling 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.

Enabling 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.

Clicking on the **Advanced View** link will display the following dialog:

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

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

- Application Items frame – 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 frame – 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 frame – 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 frame – the items in this frame are the folder architecture and report information that may be included in the synchronization package.

Application Items

Settings – clicking on the Settings link will display the following dialog:

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

Note:

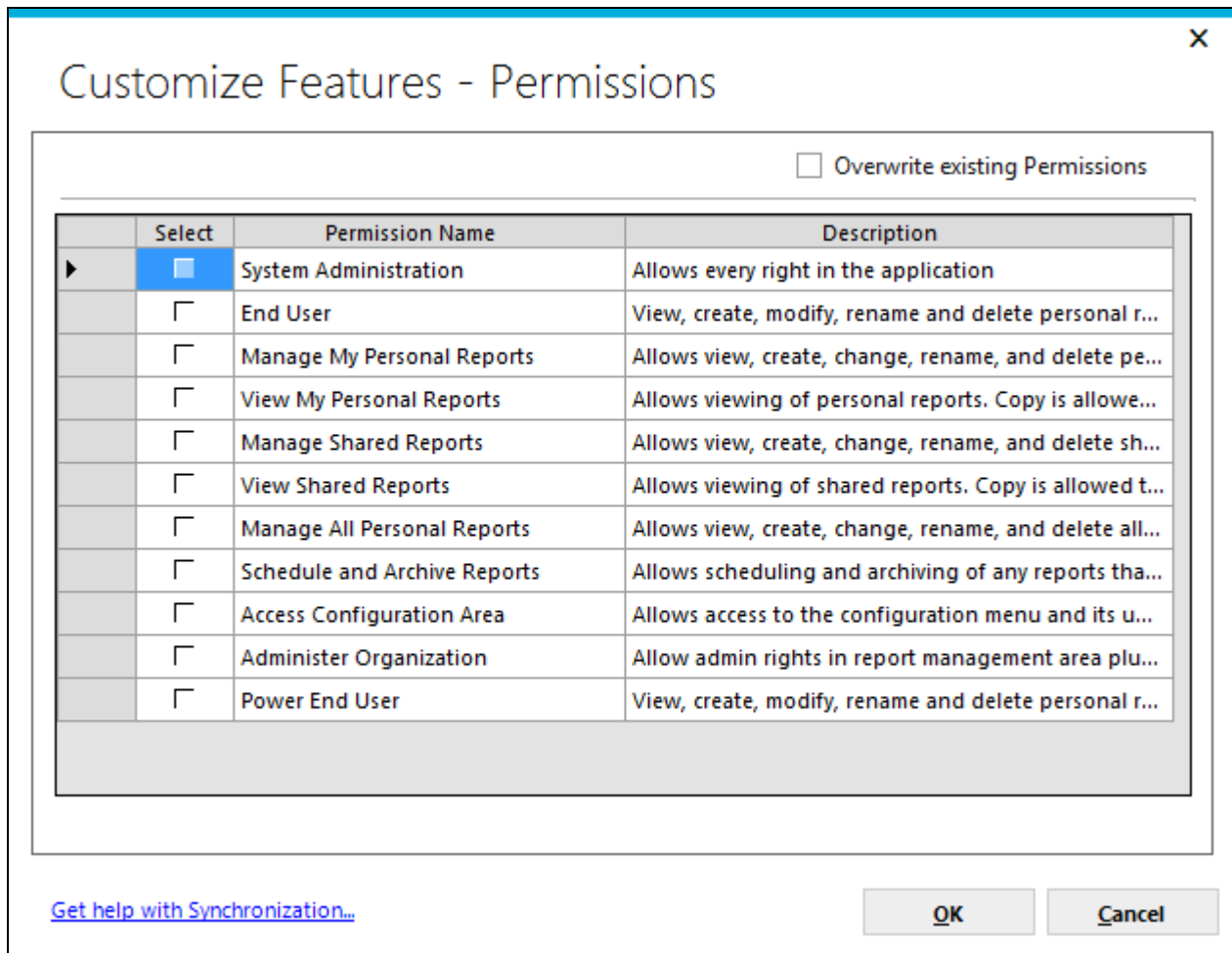
Changing the reporting database or organization will erase all current pending actions performed on the current synchronization package.

All of the options presented on the dialog 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 on the  icon to receive additional information regarding the associated option.

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

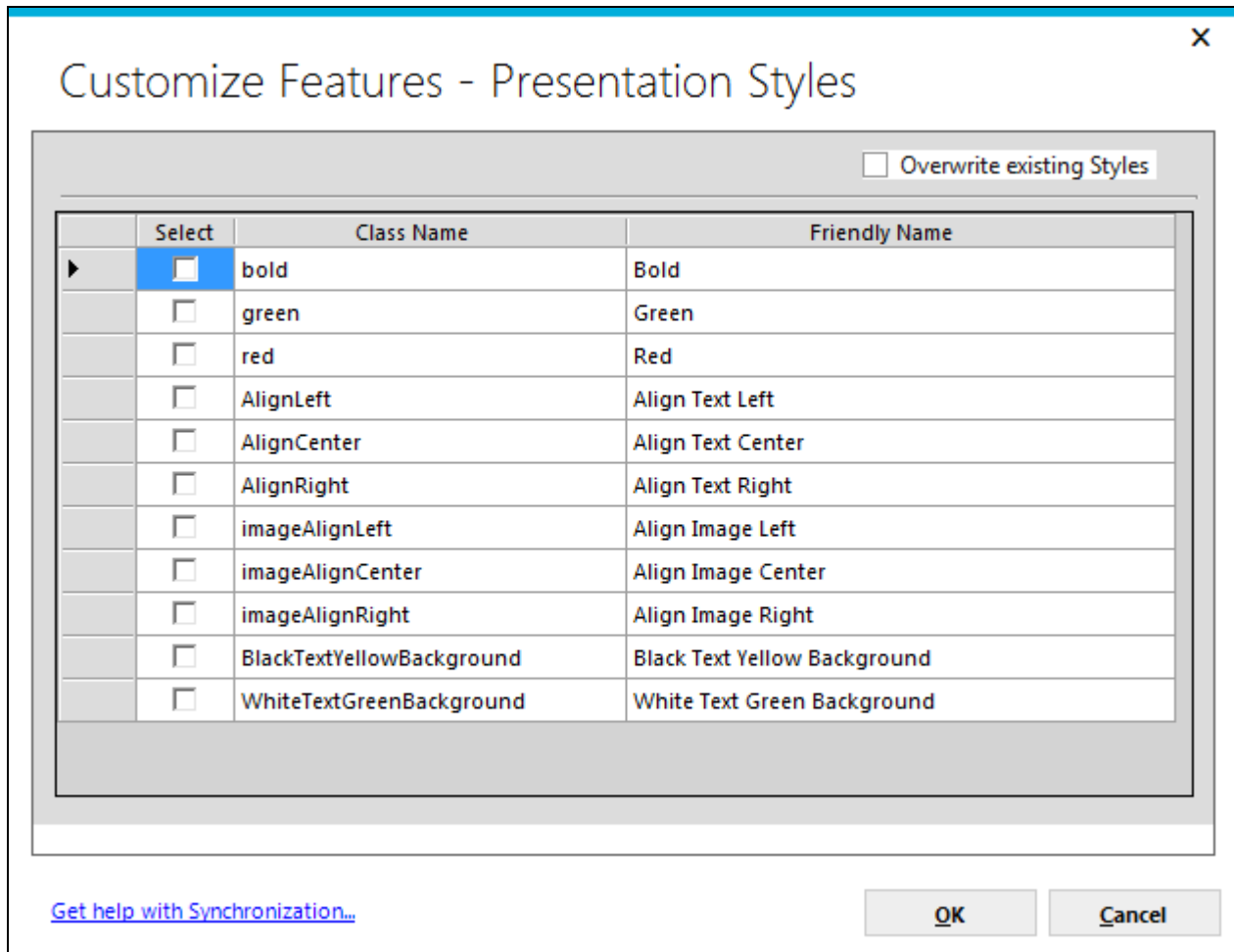
Permissions – clicking on the checkbox will indicate that all permission information will be added to the synchronization package and, when applied, will add permissions to the target instance that do not already exist. Clicking on the Permissions link will display the following dialog:



Permissions may be selected individually by clicking on the associated checkbox. All permissions may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing permissions to the target instance. Enable the **Overwrite existing Permissions** checkbox to replicate the permissions in the target instance.

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

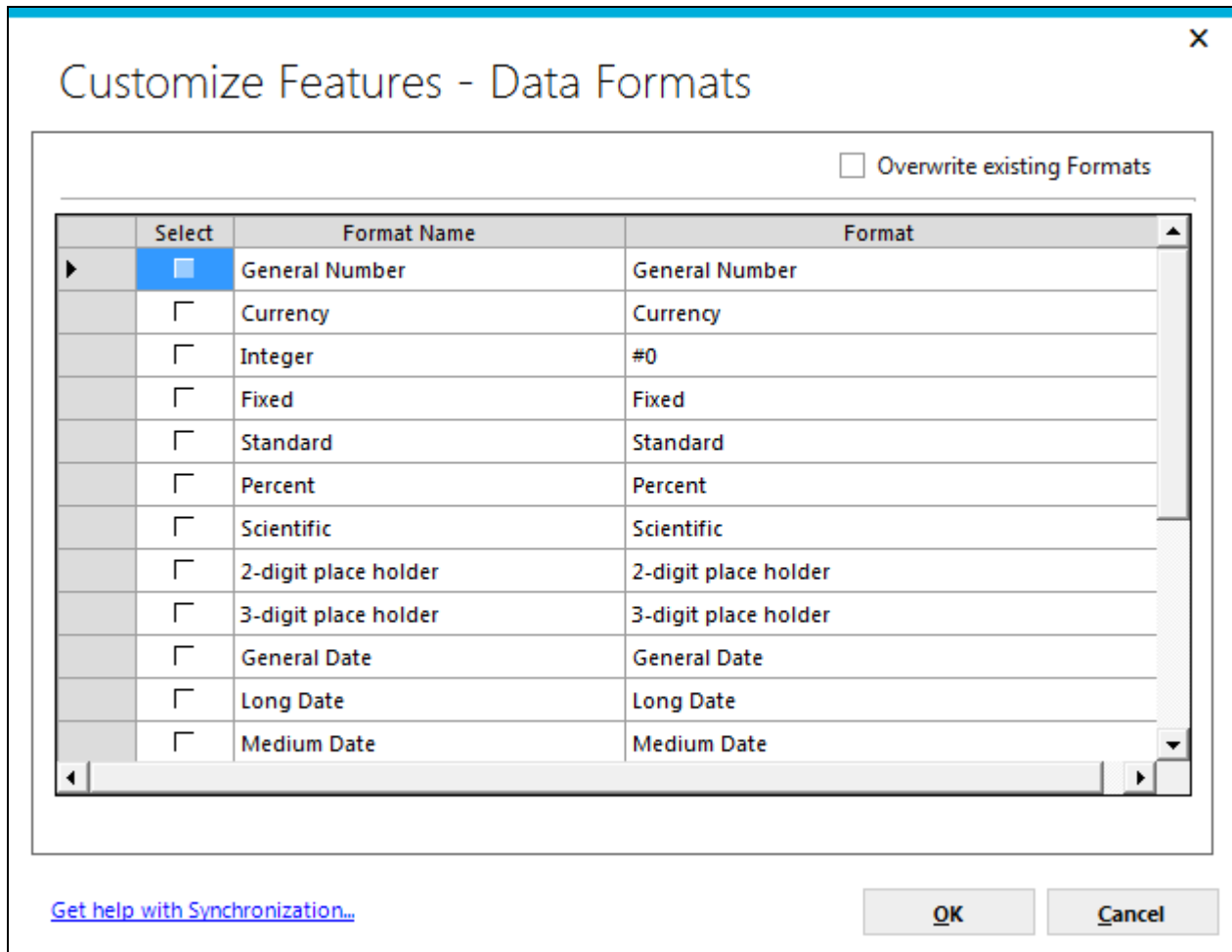
Presentation Styles – clicking on the checkbox will indicate that all presentation style information will be added to the synchronization package and, when applied, will add presentation styles to the target instance that do not already exist. Clicking on the Presentation Styles link will display the following dialog: ***



Presentation styles may be selected individually by clicking on the associated checkbox. All presentation styles may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing presentation styles to the target instance. Enable the **Overwrite existing Styles** checkbox to replicate the presentation styles in the target instance.

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

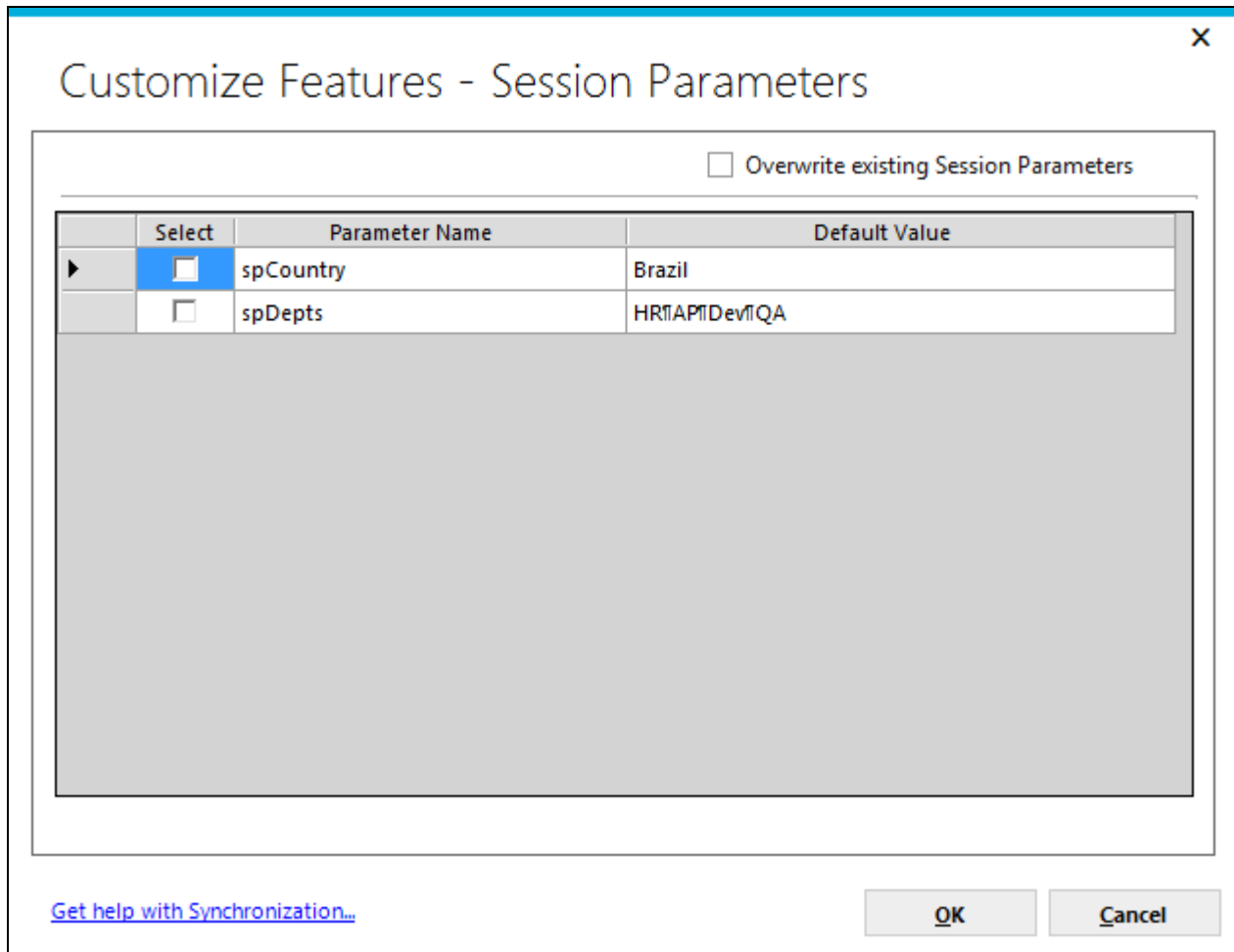
Data Formats – clicking on the checkbox will indicate that all data format information will be added to the synchronization package and, when applied, will add data formats to the target instance that do not already exist. Clicking on the Data Formats link will display the following dialog:



Data formats may be selected individually by clicking on the associated checkbox. All data formats may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing data formats to the target instance. Enable the **Overwrite existing Formats** checkbox to replicate the data formats in the target instance.

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

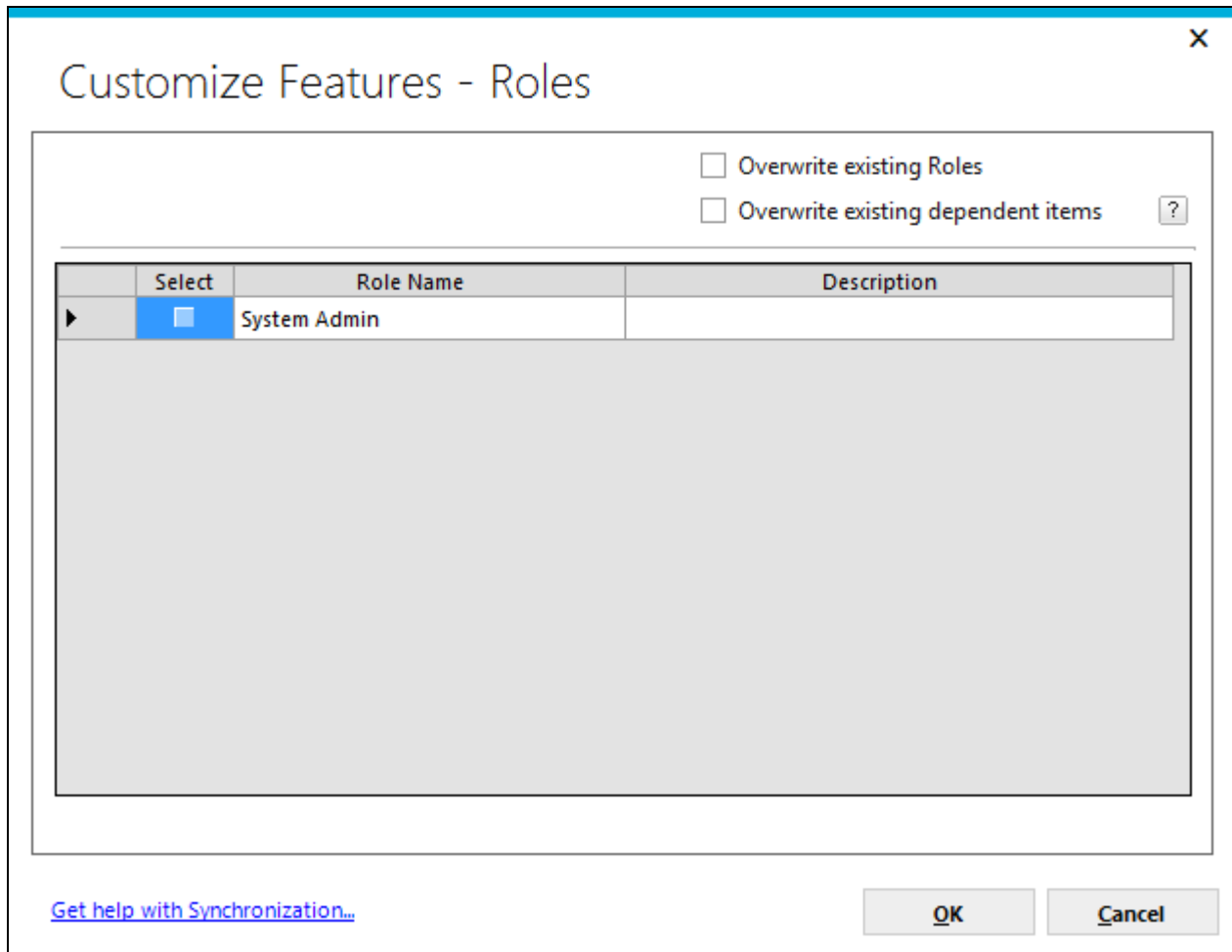
Session Parameters – clicking on the checkbox will indicate that all session parameter information will be added to the synchronization package and, when applied, will add session parameters to the target instance that do not already exist. Clicking on the Session Parameters link will display the following dialog:



Session parameters may be selected individually by clicking on the associated checkbox. All session parameters may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing session parameters to the target instance. Enable the **Overwrite existing Session Parameters** checkbox to replicate the session parameters in the target instance.


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

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



Roles may be selected individually by clicking on the associated checkbox. All roles may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing roles to the target instance. Enable the **Overwrite existing roles** checkbox to replicate the roles in the target instance.

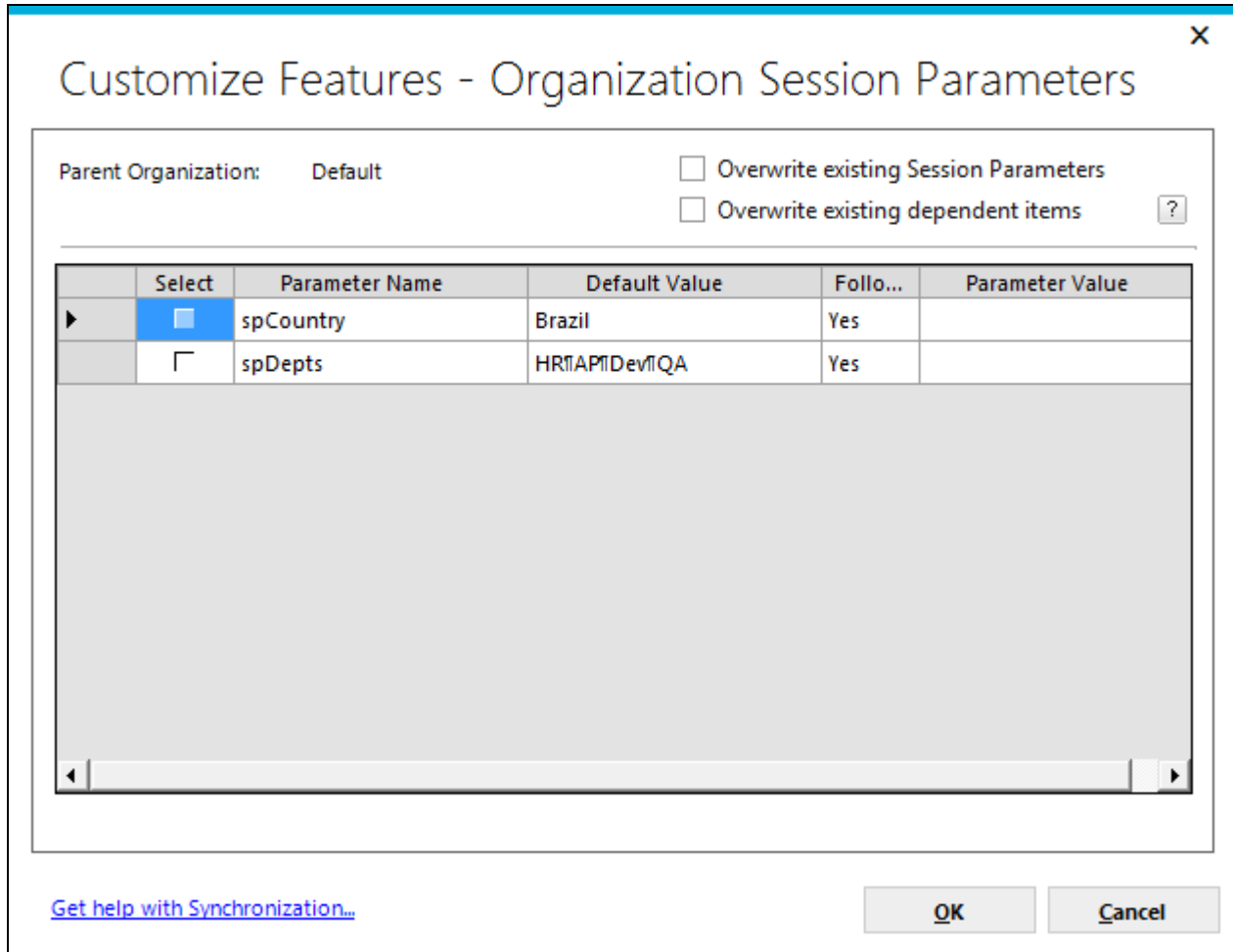
Roles are dependent upon permission packages. Permission packages may be synchronized independently of roles; however, clicking on the **Overwrite existing dependent items** will include permission package information related to the selected roles in the synchronization package and, when applied to the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

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

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


Selected Organization

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



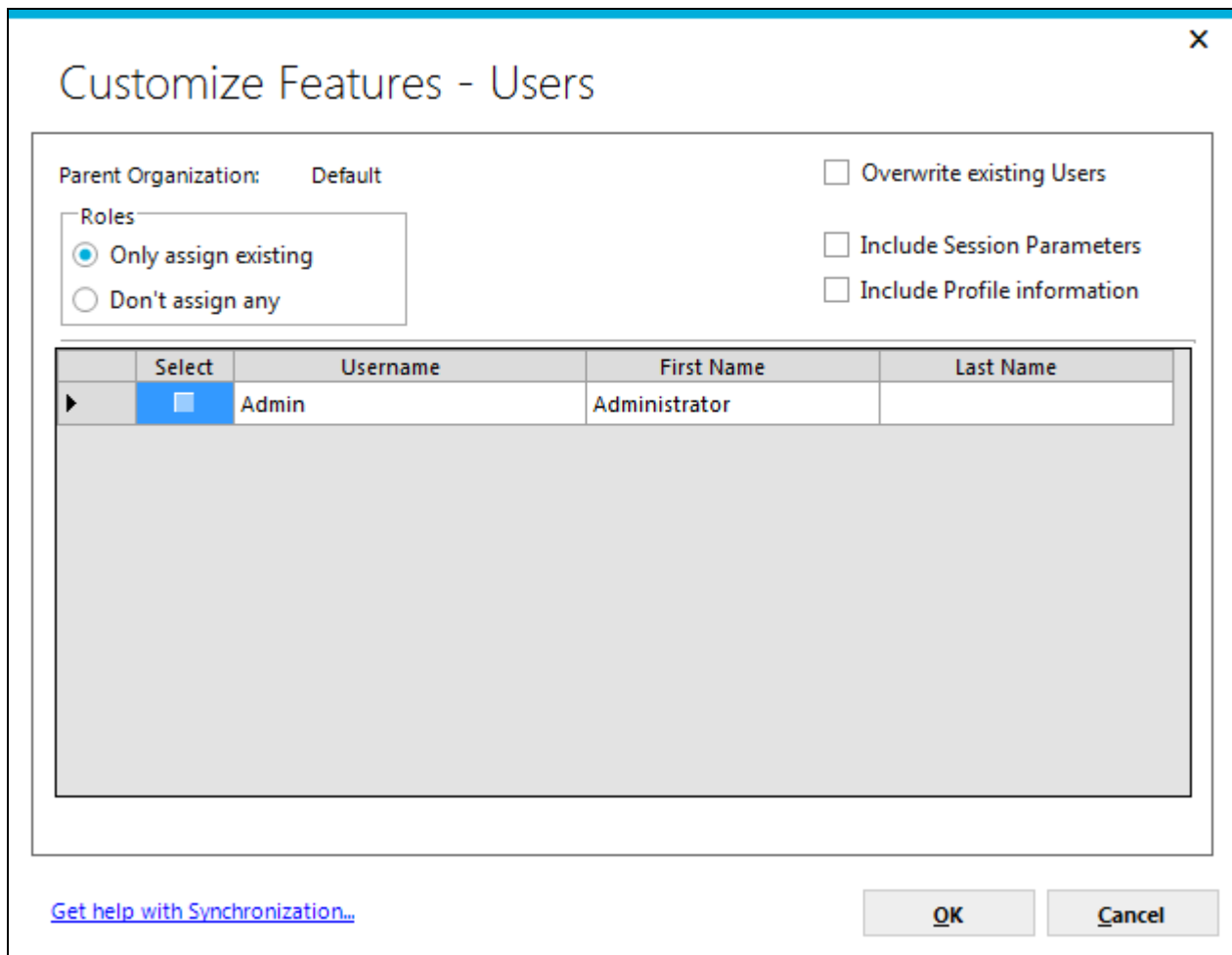
Organization session parameters may be selected individually by clicking on the associated checkbox. All organization session parameters may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing organization session parameters to the target instance. Enable 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 the **Overwrite existing dependent items** checkbox is enabled, existing dependencies will be overwritten with the new information when the synchronization package is applied to the target instance.

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

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

Users – clicking on the checkbox will indicate that all user information will be added to the synchronization package and, when applied, will add users to the target instance that 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 on the Users link will display the following dialog:



Customize Features - Users

Parent Organization: Default Overwrite existing Users

Roles

Only assign existing Include Session Parameters

Don't assign any Include Profile information

Select	Username	First Name	Last Name
<input checked="" type="checkbox"/>	Admin	Administrator	

[Get help with Synchronization...](#)

Users may be selected individually by clicking on the associated checkbox. All users may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing users to the target instance. Enable the **Overwrite existing Users** checkbox to replicate the users in the target instance.

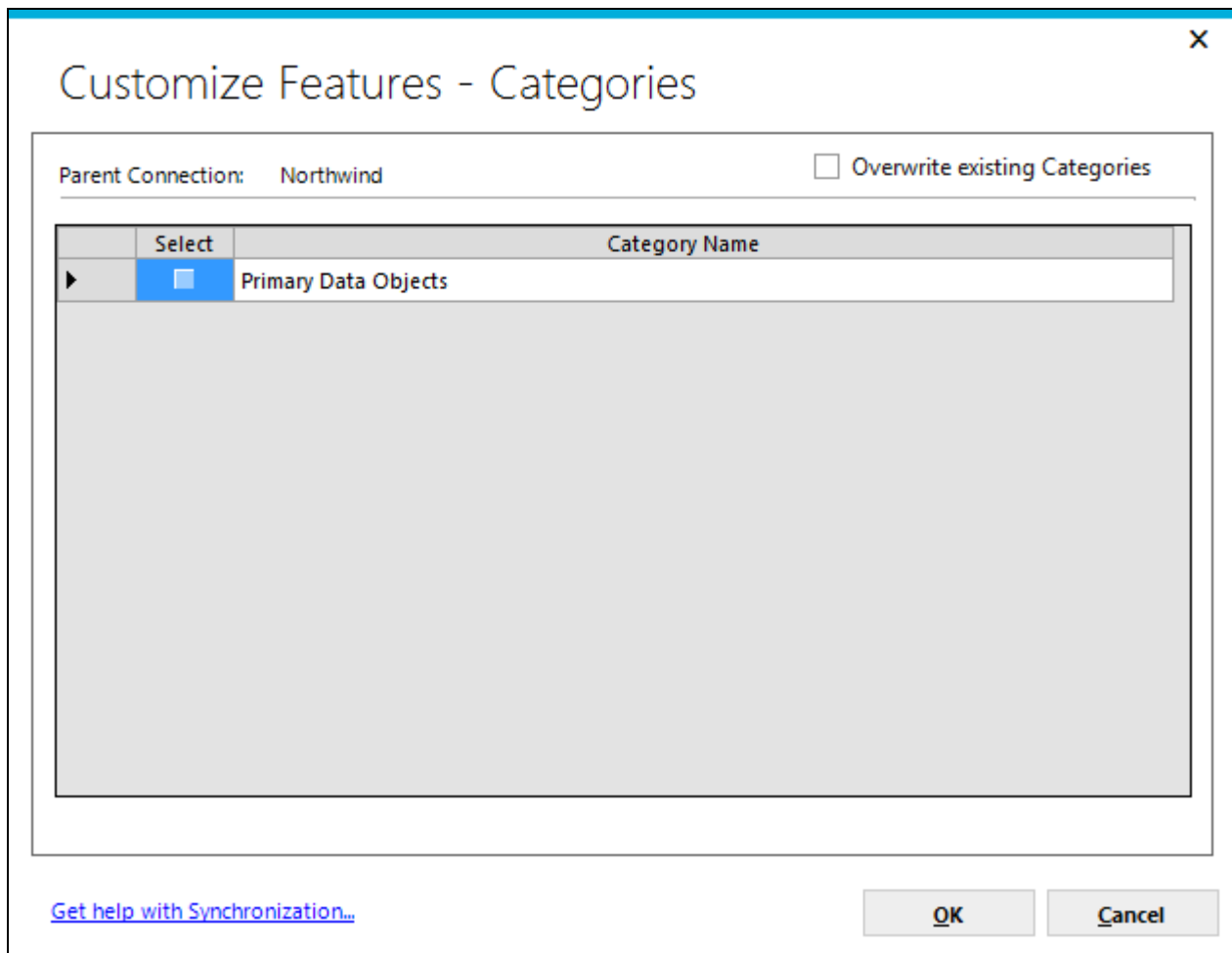
User may be created in the target instance without roles by clicking on the **Don't assign any** option in the Roles frame.

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

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

Selected Database Connection

Categories – clicking on the checkbox will indicate that all category information will be added to the synchronization package and, when applied, will add categories to the target instance that do not already exist. Clicking on the Categories link will display the following dialog:



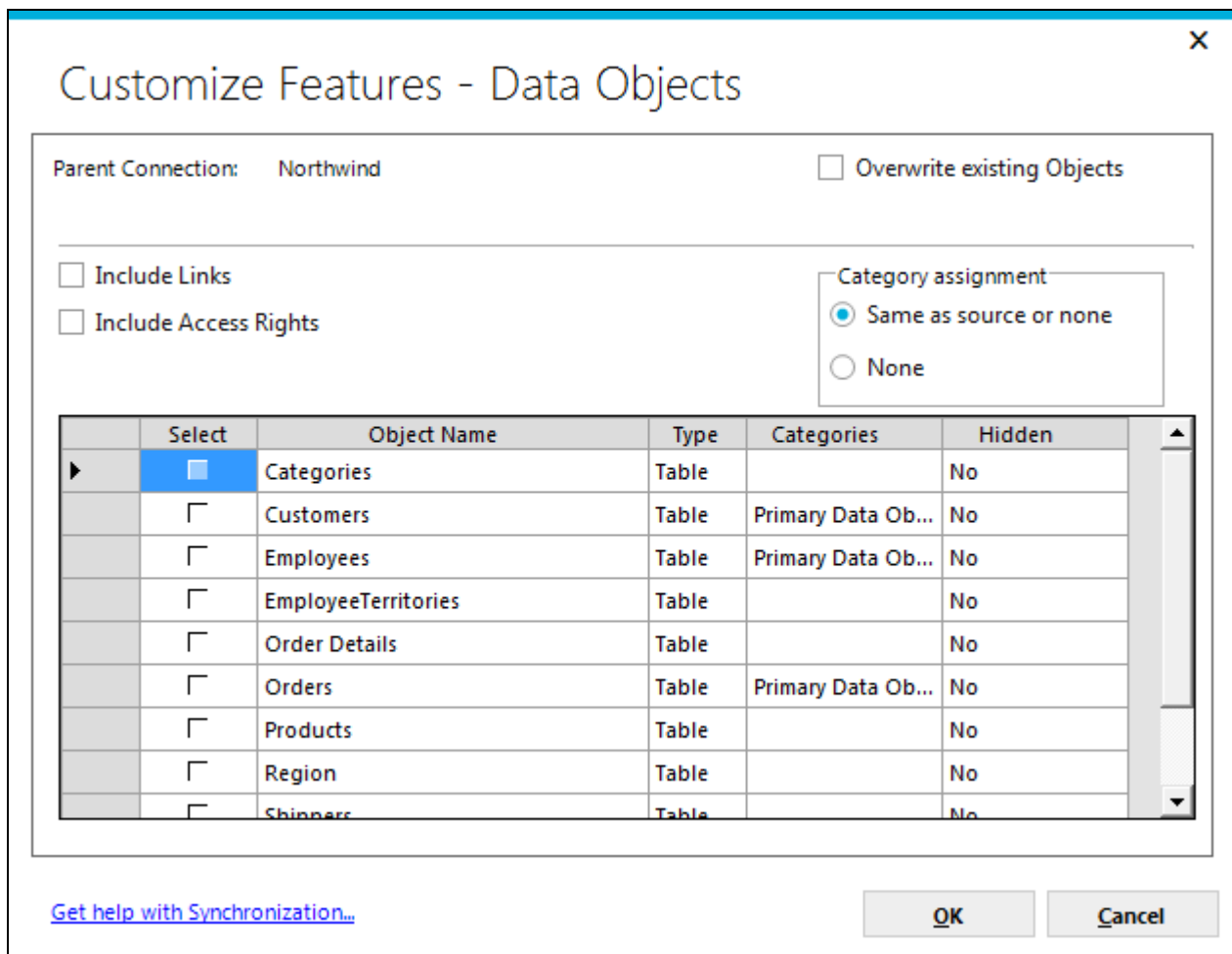
Categories may be selected individually by clicking on the associated checkbox. All categories may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing

categories to the target instance. Enable the **Overwrite existing categories** checkbox to replicate the categories in the target instance.

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

Data Objects – clicking on the checkbox will indicate that all data object information will be added to the synchronization package and, when applied, will add data objects to the target instance that do not already exist. In addition, all fixed parameter, relationship, and cascading filter information will be included in the synchronization package and 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 on the Data Objects link will display the following dialog:



Data objects may be selected individually by clicking on the associated checkbox. All data objects may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing data objects to the target instance. Enable the **Overwrite existing objects** checkbox to replicate the data objects in the target instance.

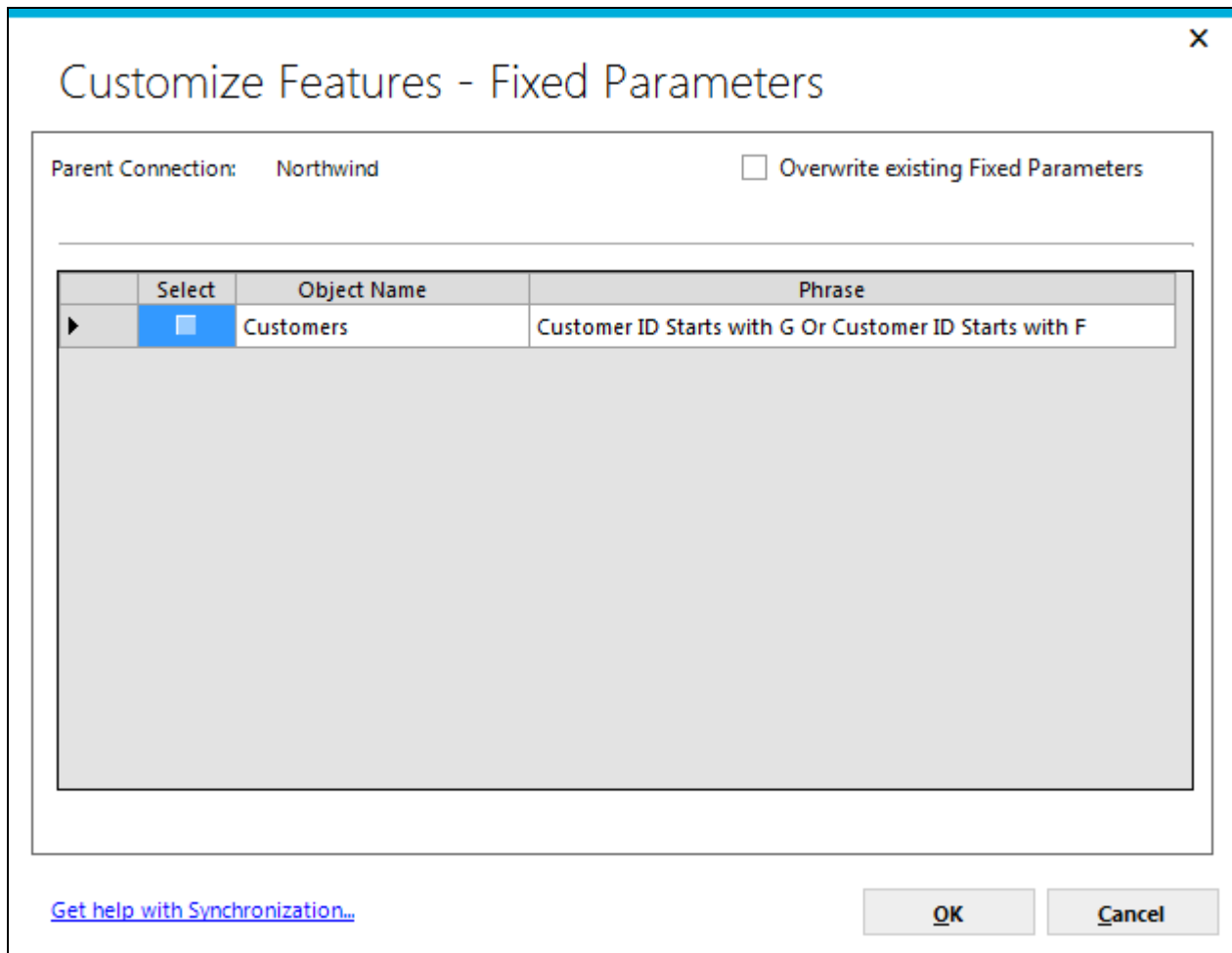
Enable the **Include Links** checkbox to add the linked column information for the selected data objects to the synchronization package. Enable the **Include Access Rights** checkbox to add object and column access rights for the selected data objects to the synchronization package. By default, links 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 on the **OK** button to temporarily save the selected data objects in the synchronization package.

Fixed Parameters – clicking on the checkbox will indicate that all fixed parameter information will be added to the synchronization package and, when applied, will add fixed parameters to the target instance that 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:

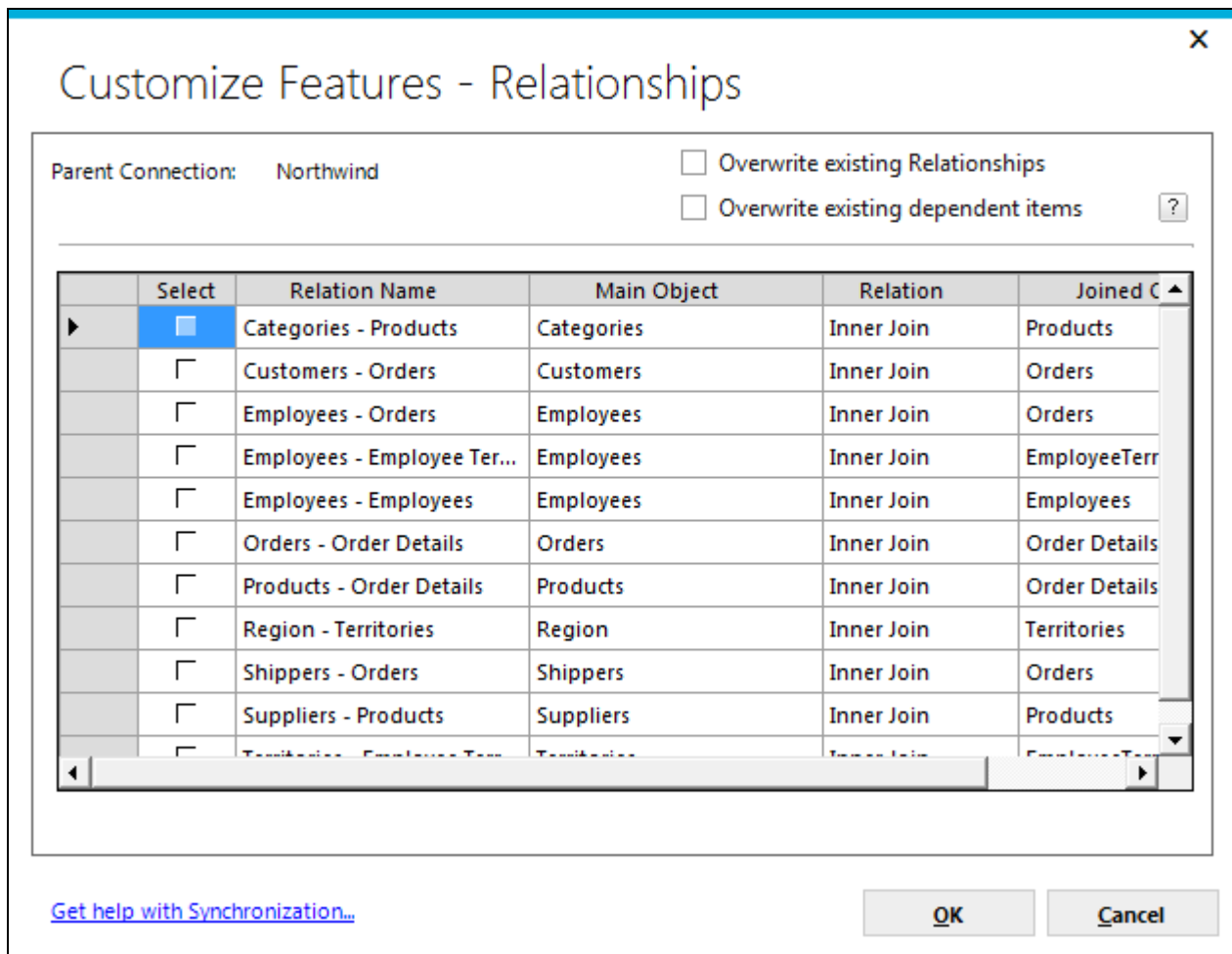


Fixed parameters may be selected individually by clicking on the associated checkbox. All fixed parameters may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing fixed parameters to the related data objects in the target instance. Enable the **Overwrite existing fixed parameters** checkbox to replicate the fixed parameters in the target instance.

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

Relationships – clicking on the checkbox will indicate that all relationship information will be added to the synchronization package and, when applied, will add relationships to the target instance that 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:



Relationships may be selected individually by clicking on the associated checkbox. All relationships may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing

relationships for the related data objects in the target instance. Enable the **Overwrite existing relationships** checkbox to replicate the relationships in the target instance.

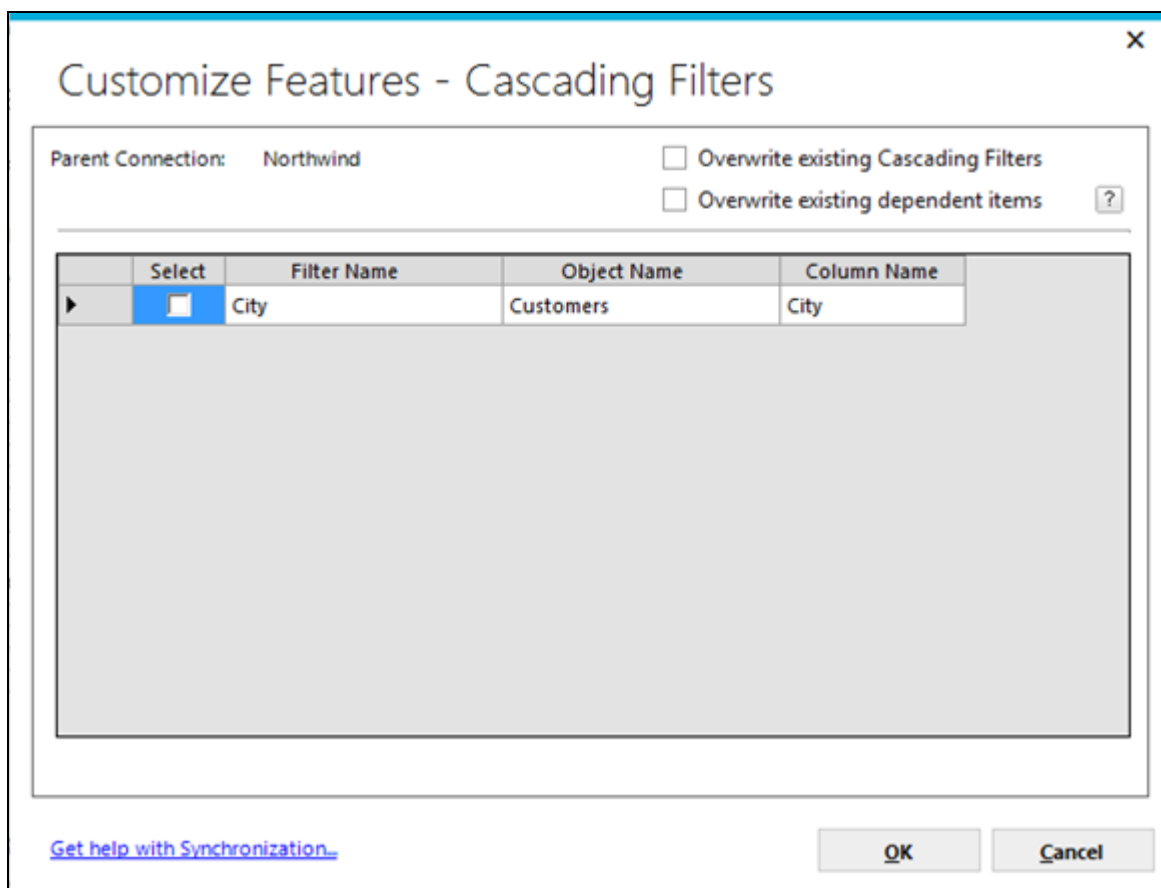
Relationships are dependent on data objects and columns and will not, by default, be added to the target instance if the dependencies do not exist. Dependent items may be affected by synchronizing relationships providing the **Overwrite existing dependent items** option is enabled.

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

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

Cascading Filters – clicking on the checkbox will indicate that all cascading filter information will be added to the synchronization package and, when applied, will add cascading filters to the target instance that 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 on the Cascading Filters link will display the following dialog:



Cascading filters may be selected individually by clicking on the associated checkbox. All cascading filters may be selected / deselected by clicking on the **Select** column header. The default behavior is to add

missing cascading filters in the target instance. Enable 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 the **Overwrite existing dependent items** option is enabled.

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

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

Content Items

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

Clicking on the Folders link will display the following dialog:

Parent Connection: Northwind Overwrite existing Folders
 Parent Organization: Default

Include Access Rights

Owner assignment:
 Same as source or Admin
 Admin

Folder assignment:
 Same as source or root
 Root

Select	Folder Name	Folder Path	Type	Owner
<input checked="" type="checkbox"/>	HR Reports		Perso...	Admin
<input type="checkbox"/>	Management Reports		Perso...	Admin

[Get help with Synchronization...](#)

Folders may be selected individually by clicking on the associated checkbox. All folders may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing folders in the target instance. Enable the **Overwrite existing folders** checkbox to replicate the folders in the target instance.

Folders may have associated access rights. Enable the **Include Access Rights** option 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 on the **OK** button to temporarily save the selected folders in the synchronization package.

Reports – clicking on the checkbox will indicate that all report information will be added to the synchronization package and, when applied, will add reports to the target instance that 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:

Parent Connection: Northwind Overwrite existing Reports
 Parent Organization: Default Overwrite existing dependent items

Include Schedules
 Include Subscriptions

Owner assignment: Same as source or Admin Admin
 Folder assignment: Same as source or root Root

Select	Report Name	Folder Path	Type	Owner
<input checked="" type="checkbox"/>	Categories		Perso...	Ad Ho...
<input type="checkbox"/>	Categories / Products		Perso...	Ad Ho...
<input type="checkbox"/>	Crosstab		Perso...	Admin
<input type="checkbox"/>	Heat Map		Perso...	Admin
<input type="checkbox"/>	Product Summary	Marketing Reports\	Shared	Admin
<input type="checkbox"/>	Heatmap II	Marketing Reports\	Shared	Admin

[Get help with Synchronization...](#)

Reports may be selected individually by clicking on the associated checkbox. All reports may be selected / deselected by clicking on the **Select** column header. The default behavior is to add missing reports in the target instance. Enable 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. Enable **Overwrite existing dependent items** to replicate the dependencies in the target instance.

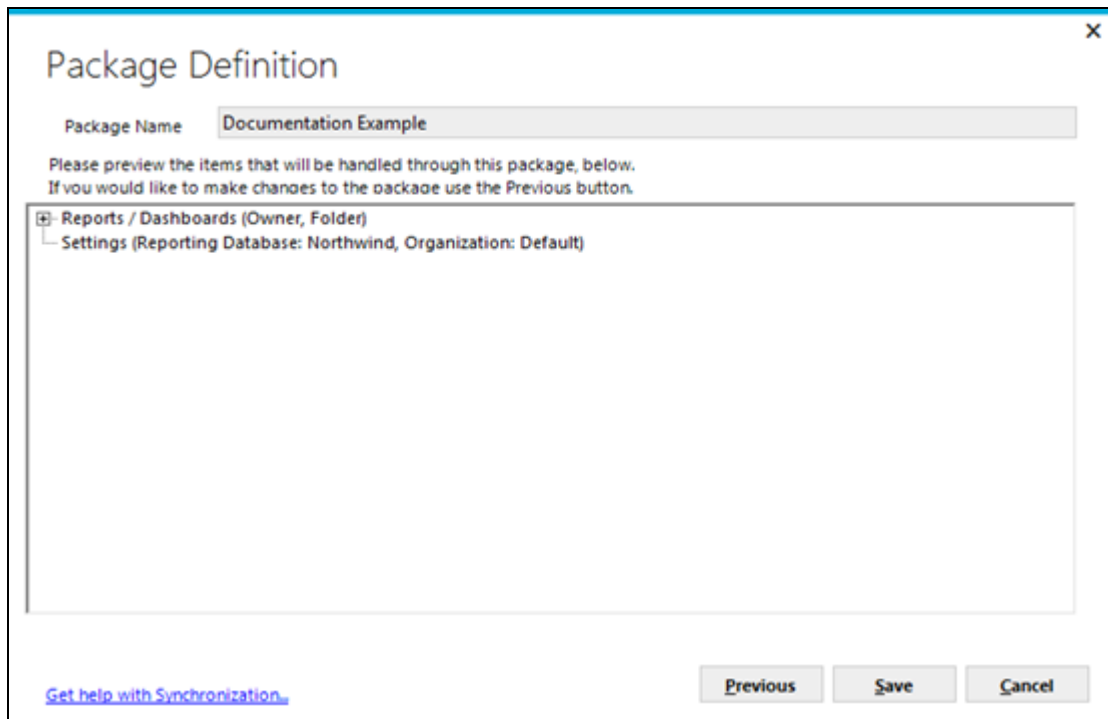
Schedules and subscription information related to the selected reports may be included in the synchronization package by enabling the **Include Schedules** and **Include Subscriptions**, respectively.

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 on the **OK** button 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. The dialog identifies the synchronization package and presents an outline of the items included the package. As an example:



The expectation is that the synchronization package content will be reviewed 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 may be reviewed by expanding the tree. Processing options are presented 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.

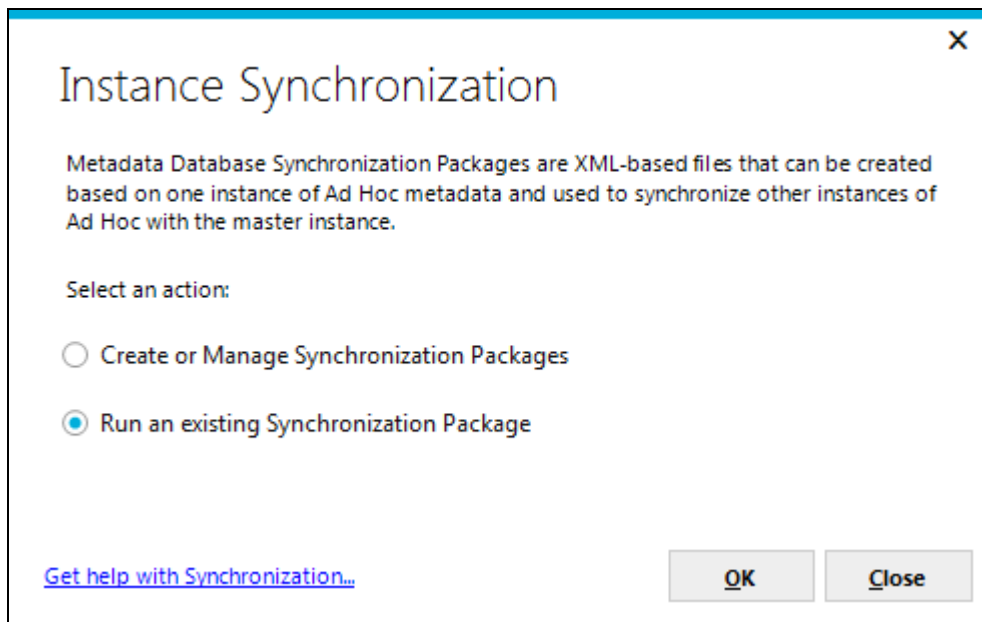
The "Settings" item identifies the reporting database connection and organization that was used as the source for the synchronization package. The source instance for the synchronization package is the active instance in the Management Console at the time the package is created.

Click on the **Previous** button to return to the **Package Definition** dialogs.

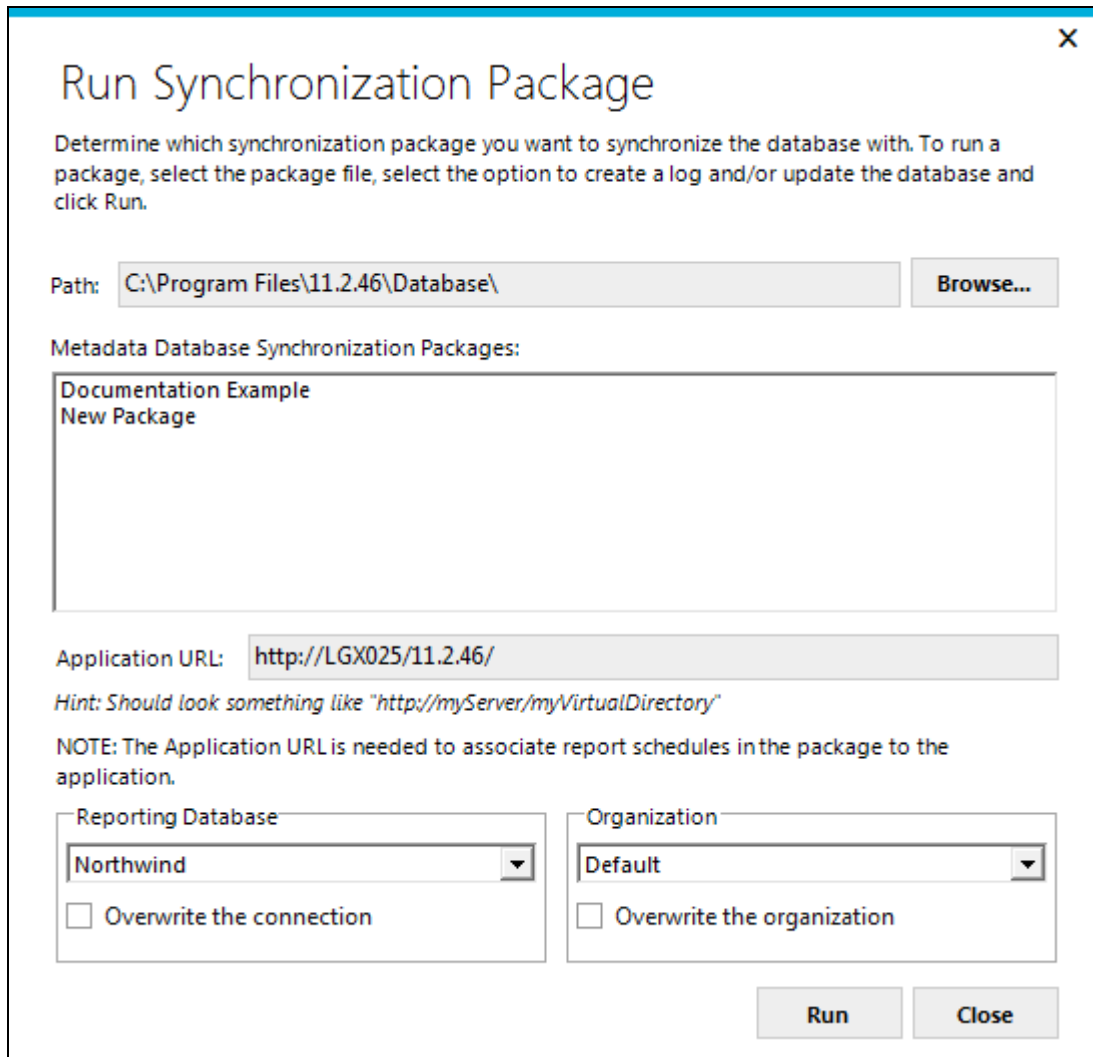
Click on the **Save** button to create the synchronization package file with the current selected items and return to the **Manage Synchronization Package** dialog.

Applying a Synchronization Package to a Target Instance

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



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



The **Run Metadata Database Synchronization Package dialog** presents 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 on the **Browse** button 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 may be overridden by selecting a different reporting database from the list. Enable the **Overwrite the connection** option 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. Enable the **Overwrite the organization** option 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 on the **Run** button

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

Click on the **Close** button to dismiss the Run Synchronization Package dialog.

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:

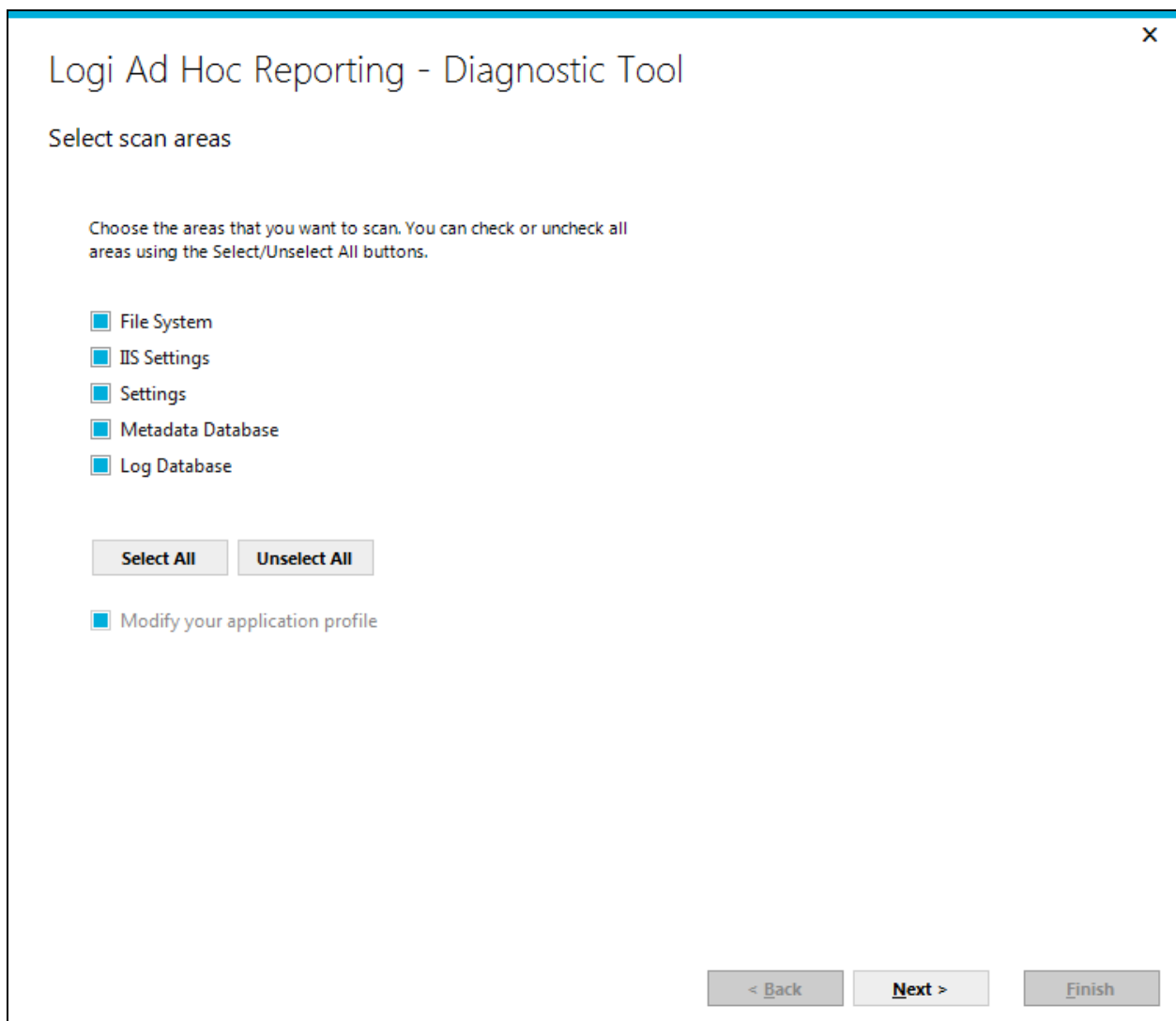
Synchronization packages may be run from the Command line. Please contact Support@LogiAnalytics.com for instructions for this process.

Diagnostic Scan

The Management Console provides an invaluable tool that can assist in diagnosing configuration issues with an instance. 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 on the Tools action group and then the Diagnostic action to display the following dialog:



The screenshot shows a dialog box titled "Logi Ad Hoc Reporting - Diagnostic Tool" with a close button (X) in the top right corner. The main heading is "Select scan areas". Below this, there is a paragraph of instructions: "Choose the areas that you want to scan. You can check or uncheck all areas using the Select/Unselect All buttons." There are five checkboxes, each followed by a label: "File System", "IIS Settings", "Settings", "Metadata Database", and "Log Database". Below these checkboxes are two buttons: "Select All" and "Unselect All". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Finish".

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

- *File System* – to look for the expected folders and files
- *IIS settings* – to verify the URL, application pools and other IIS information
- *Settings* – to display pertinent attributes from the *instance/_Definitions/_Settings.lgx* file
- *Metadata Database* – to verify the connection, examine the metadata database structure and content
- *Log Database* – to verify the connection and structure of the event logging database

Click on the **Select All** or **Unselect All** buttons 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 on the **Next** button to display the **Application Profile** dialog.

×

Application Profile

So that we may provide you better support, we'd like to gather your Logi Ad Hoc Reporting application profile. This information will assist us in more quickly diagnosing and responding to a possible future Support inquiry.

Company Name:

1. Do you utilize a Development/Staging environment before upgrading to a newer version?
 - Yes
 - No
2. What database standard and version is your source data stored in (e.g., SQL Server 2005, Oracle 10g, etc.)?

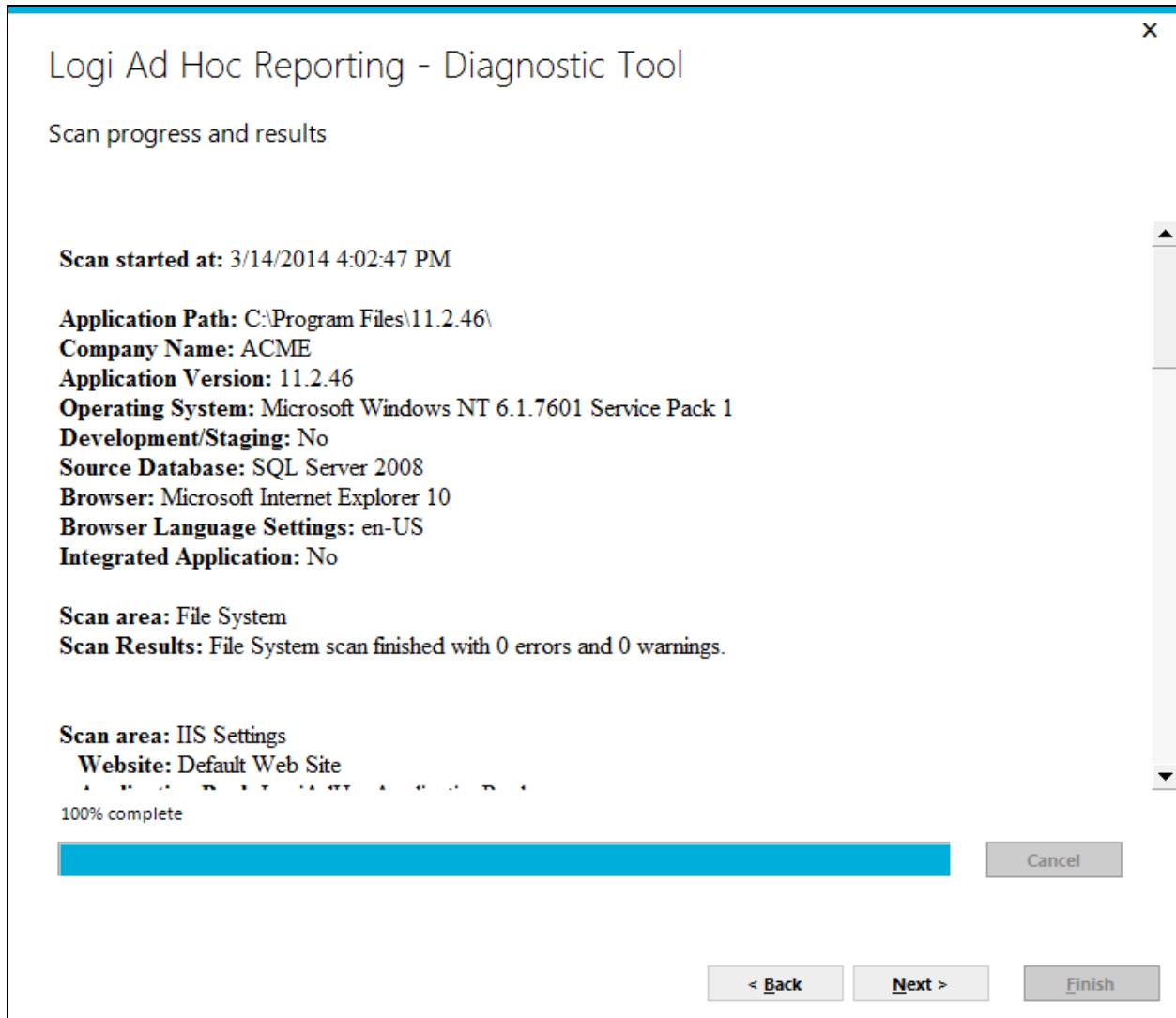
Database Type: Version:
3. What browser application and version do you primarily use (e.g., MS-IE, Mozilla Firefox, etc.)?

Browser Type: Version:
4. What is your primary browser language and region setting (e.g., en-US, en-GB, etc.)?
5. Is the application embedded or integrated in another web application?
 - Yes
 - No

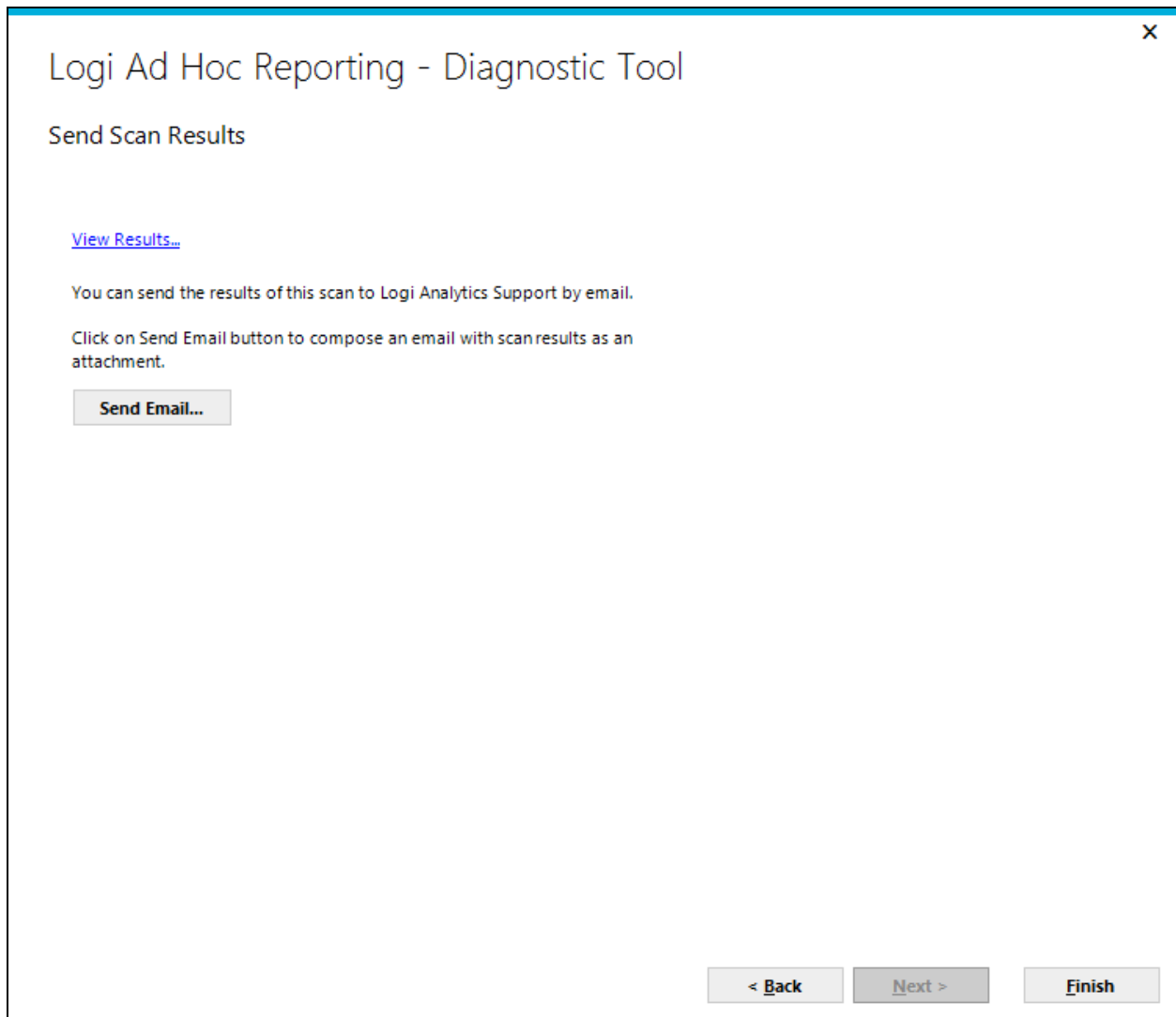
Enter the requested information and click on the **OK** button.

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

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



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



This dialog presents 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 *instance/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 on the **Tools** action group and then the **Cleanup** action. The following dialog will be presented:

Cleanup
✕

This utility will help you manage disk space by cleaning up archives, temporary files, and backup files. It may also be run from the command line. For additional documentation, see the Cleanup Utility Usage Guide.

Archives

Select "Remove Old Archives" to remove any archives that were created before the specified date.

Select "Optimize Old Archives" to remove unnecessary files from a archive folder. This option will only affect archives created before Version 9.

Archive File System Folder:

Remove Old Archives Optimize Old Archives

Older than:
 Days or

Report Backups

Report Backups are created when a report is deleted for any reason. Select this option to remove backups older than the specified date.

Remove Report Backups

Older than:
 Days or

Temporary Files

Temporary files are created during runtime to handle large data sets and exports. These files are saved in rdDownload and rdDataCache folder of the application. Select this option to remove the files that were created before the specified number of hours.

Remove Temporary Files

Older than:
 Hours or

Configuration Backups

Configuration Backups are created when report database schema is changed using the Schema Wizard or Relationship Wizard. Select this option to remove backups that were created before the specified date.

Remove Configuration Backups

Older than:
 Days or

[Get help with Cleanup Utility...](#)

The dialog is divided into four panels:

- *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 the **Run** button 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. Enabling this option will remove the extraneous files 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 resource 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 standard Logi Ad Hoc Reporting's resource file name (e.g., ReportWizard10.aspx).
- Where 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" is for English - United States.
- Where the **resx** is the standard Logi Ad Hoc Reporting's file extension for resource files.

Note:

The original and internationalized resource files are stored in the application's *App_GlobalResources* and *App_LocalResources* directories and in *App_LocalResources* subdirectories found in other directories 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 of the **Resource Manager** offers 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

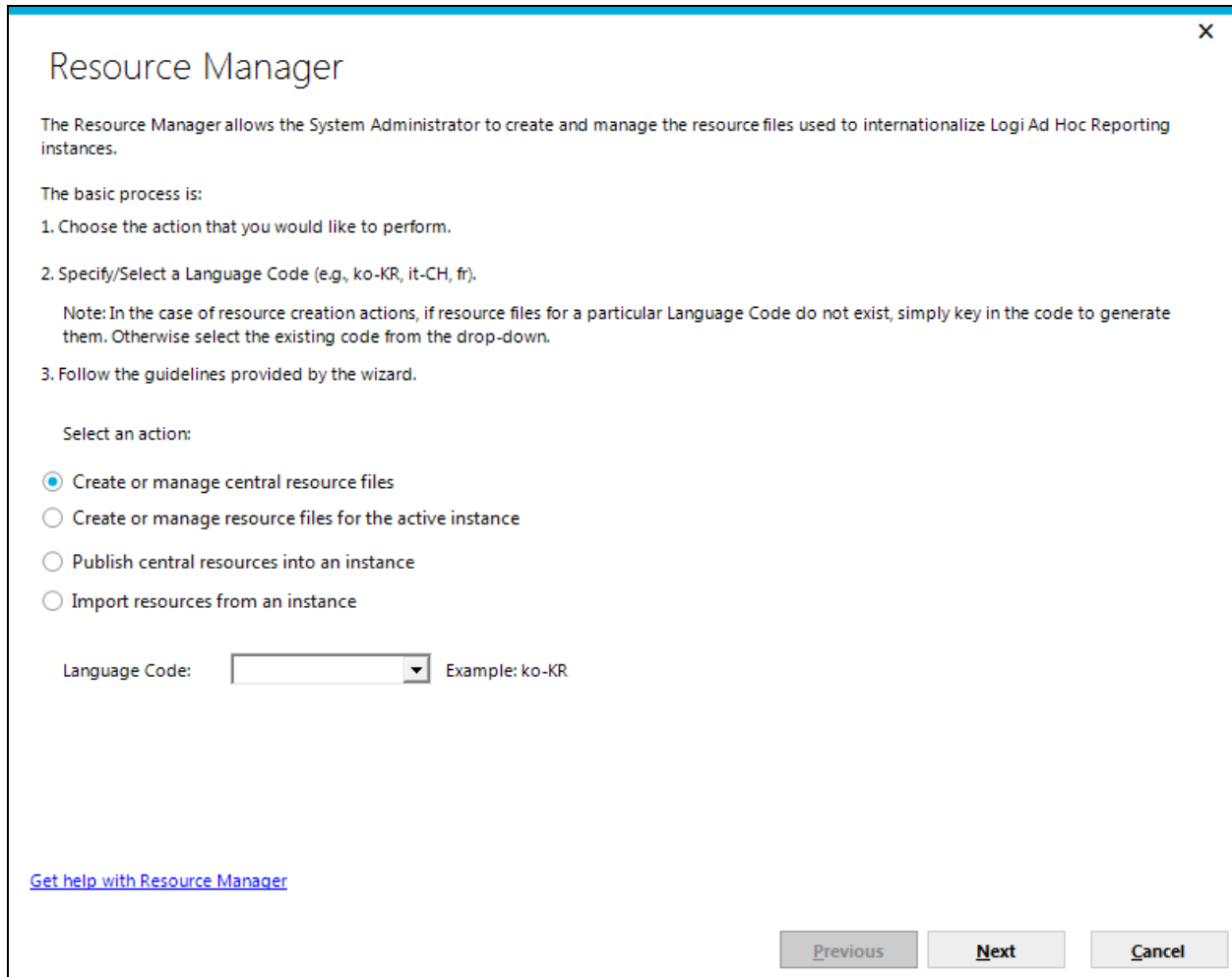
This option copies the selected language-specific resource files from the specified Ad Hoc instance into the Management Console.

A typical envisioned scenario for creating language-specific resource files and localizing an Ad Hoc instance would be to:

- 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** dialogs are accessed by clicking on the *Tools* action group and the *Internationalization* action. The following dialog will be presented:



Resource Manager X

The Resource Manager allows the System Administrator to create and manage the resource files used to internationalize Logi Ad Hoc Reporting instances.

The basic process is:

1. Choose the action that you would like to perform.
2. Specify/Select a Language Code (e.g., ko-KR, it-CH, fr).

Note: In the case of resource creation actions, if resource files for a particular Language Code do not exist, simply key in the code to generate them. Otherwise select the existing code from the drop-down.
3. Follow the guidelines provided by the wizard.

Select an action:

- Create or manage central resource files
- Create or manage resource files for the active instance
- Publish central resources into an instance
- Import resources from an instance

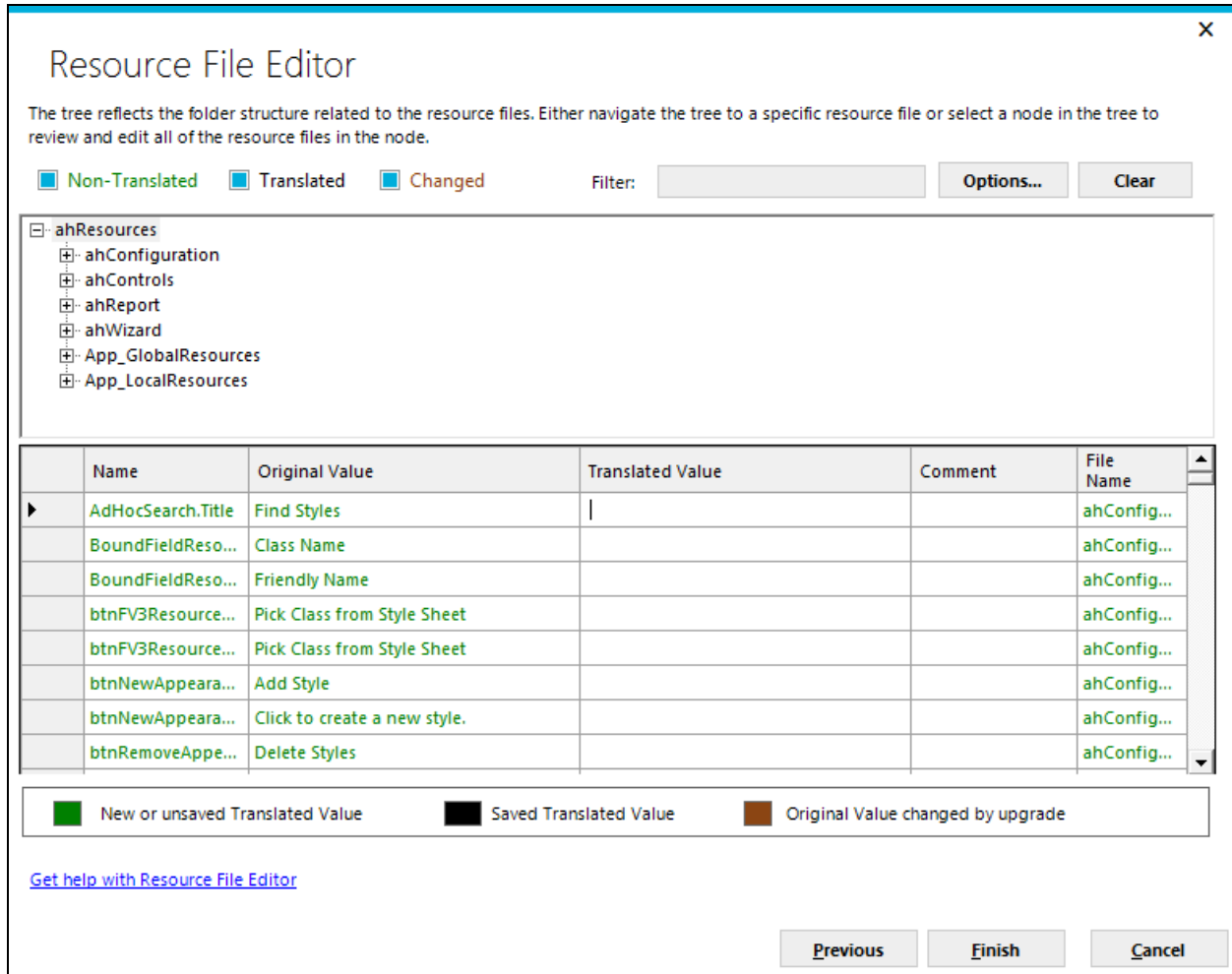
Language Code: ▼ Example: ko-KR

[Get help with Resource Manager](#)

Select an action, either select or enter a *Language Code* and click on the **Next** button.

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 is displayed. If an existing *Language Code* is selected, the existing language-specific resource files are presented in the Resource File Editor dialog.



The tree structure in the top panel is grouped by 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 on the desired resource file name to load the *Translated Value* grid

Note:

Resources are displayed in a hierarchical manner. i.e. 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.

Note:

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**.

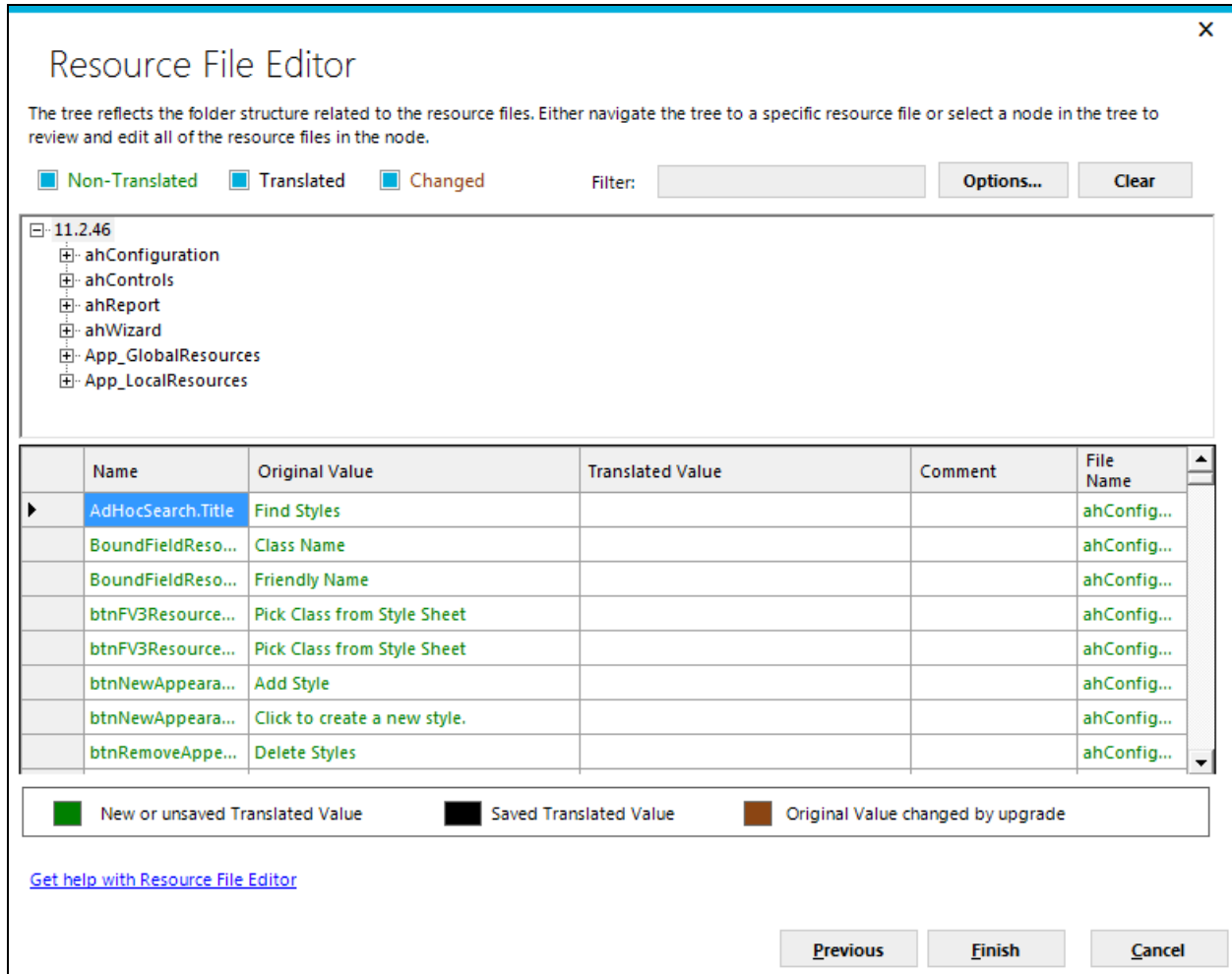
Specifying a Translated Value:

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

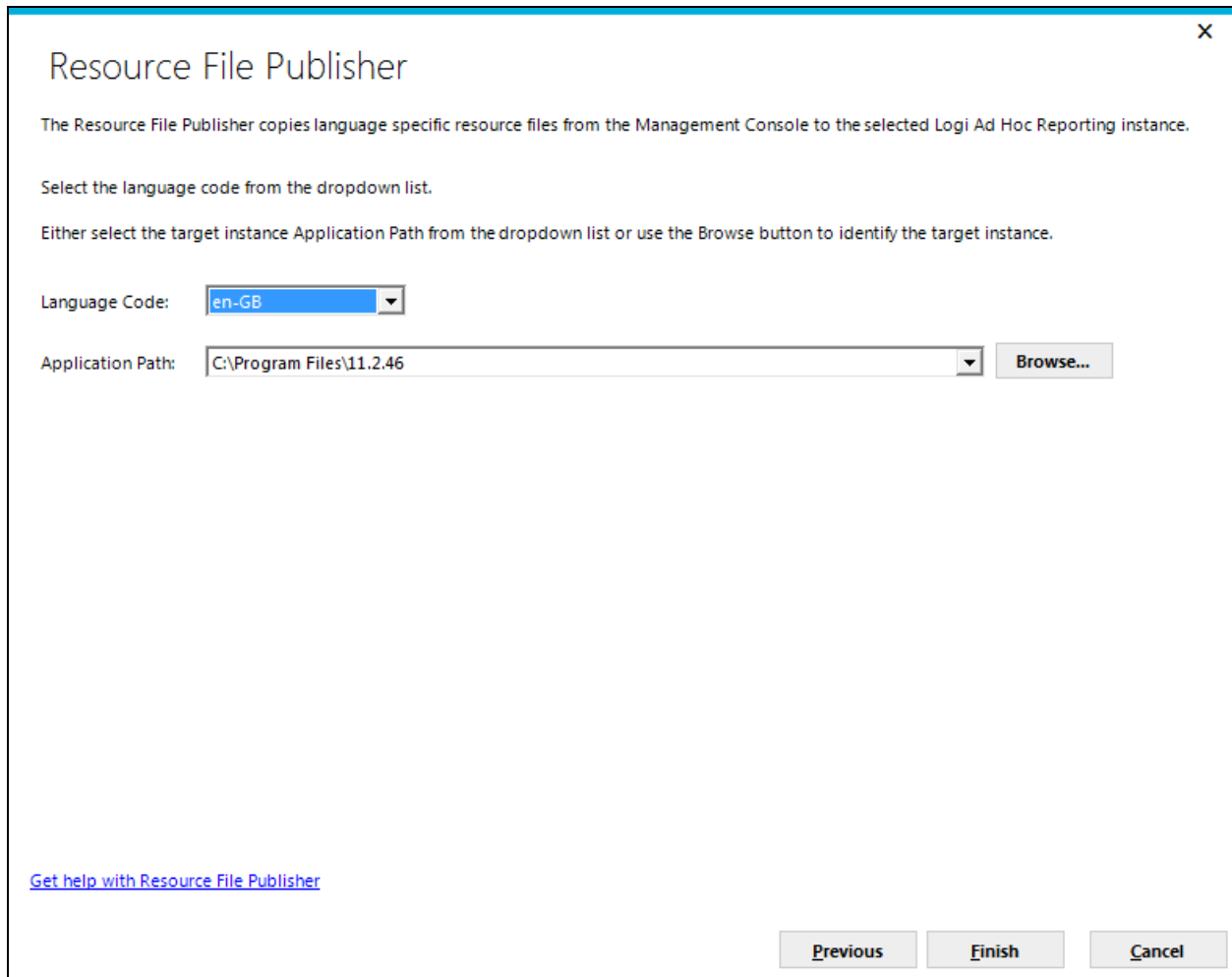
If this option is selected and the *Language Code* is new, the resource files are created in the appropriate folders in the active Ad Hoc instance under the instance root folder and the **Resource File Editor** dialog is displayed. If an existing *Language Code* is selected, the existing language-specific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



The **Resource File Editor** dialog 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 is used identically to that outlined 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 is presented.



The screenshot shows the "Resource File Publisher" dialog box. It has a title bar with a close button (X) in the top right corner. The main content area contains the following text and controls:

- Text: "The Resource File Publisher copies language specific resource files from the Management Console to the selected Logi Ad Hoc Reporting instance."
- Text: "Select the language code from the dropdown list."
- Text: "Either select the target instance Application Path from the dropdown list or use the Browse button to identify the target instance."
- Form: "Language Code:" followed by a dropdown menu showing "en-GB".
- Form: "Application Path:" followed by a text box containing "C:\Program Files\11.2.46" and a "Browse..." button to its right.
- Text: "[Get help with Resource File Publisher](#)" at the bottom left.
- Buttons: "Previous", "Finish", and "Cancel" at the bottom right.

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 the **Browse** button to locate the instance.

Click on the **Finish** button 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 is presented.

Resource File Importer [X]

The Resource File Importer copies language specific resource files from the selected Logi Ad Hoc Reporting instance into the Management Console folder.

Either select the source instance Application Path from the dropdown list or use the Browse button to identify the source instance.

Select the language code from the dropdown list.

Note: If language specific resource files already exist in the Management Console, you will be prompted to confirm that the existing files should be overwritten. Once the file are overwritten, the changes are permanent and can't be undone.

Application Path:

Language Code:

[Get help with Resource File Importer](#)

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

Select the *Language Code* from the dropdown list.

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

Resource File Editor Detailed Usage

Following are additional usage topics for the **Resource File Editor**. They include:

- Working with Tokens – how tokenized references should be handled
- Upgrade Expectations – what to expect when resource files are upgrade and usage information
- Filter Usage – how to use the filter options

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 "@Replacel~" 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 "@Replacel~"

You may encounter more than one placeholder in a phrase. In this case they will be named: **@Replacel~** or **@Replacel2~**, 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 the **Finish** button 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 of 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:

Non-Translated Translated Changed

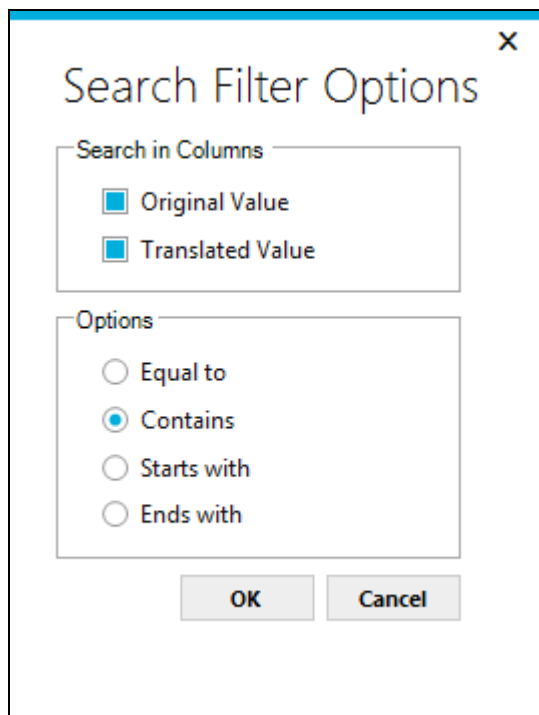
Another option for narrowing down the resources is filtering them by a certain text. In the following figure, only resources that contain the word “find” and are located inside of *ahReport* folder are displayed.

The screenshot shows the 'Resource File Editor' window. At the top, there are three checkboxes: 'Non-Translated' (checked), 'Translated' (checked), and 'Changed' (checked). To the right, there is a 'Filter:' input field containing the text 'find', along with 'Options...' and 'Clear' buttons. Below this is a tree view showing a folder structure under 'ahResources', with 'ahReport' expanded. The main area is a table with the following data:

Name	Original Value	Translated Value	Comment	File Name
AdHocSearch.Title	Find Styles			ahConfig...
cvShowFilterRes...	Find Filter rows value is required.			ahConfig...
AdHocSearch.Title	Find Filters			ahConfig...
AdHocSearch.Title	Find Filters			ahConfig...
AdHocSearch.Title	Find Catalogs			ahConfig...
AdHocSearch.Title	Find Categories			ahConfig...
AdHocSearch.Title	Find Data Formats			ahConfig...
btnFindParamRe...	Find Request Parameter			ahConfig...

At the bottom of the window, there is a legend with three items: a green square for 'New or unsaved Translated Value', a black square for 'Saved Translated Value', and a brown square for 'Original Value changed by upgrade'. Below the legend is a link 'Get help with Resource File Editor' and three buttons: 'Previous', 'Finish', and 'Cancel'.

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



Additional Resources

Welcome

When the Management Console is initially launched, the first dialog presented 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 on the Welcome action group.

-
×

Logi Ad Hoc Management Console

Welcome

Getting Started

Select or Create an Instance

Instance Configuration

Report Database Management

Manage an Instance

Tools

Resources

About the Management Console


Welcome to the Logi Ad Hoc Management Console!

If you are new to the Logi Ad Hoc Management Console, we recommend that you:

- 1- Read the documents in the [Getting Started](#) section.
- 2- Browse through tutorials in the [Resources](#) section.
- 3- Create a [new Ad Hoc Instance](#).


If you are an experienced Logi Ad Hoc Management Console user, we recommend that you:

- 1- Review the [Release Notes](#) link in the [About...](#) area and learn about what's new.
- 2- Browse through the menu items on the left to see the options that are available.
- 3- [Upgrade](#) an old instance or go to the [Instance Configuration](#) area to perform individual configuration tasks.



Developer Network

Looking for documentation, video tutorials, and other resources? The **Logi Analytics Developer Network** is an active community of Ad Hoc users and administrators and your source for the resources that help our Ad Hoc customers succeed. [Visit DevNet](#)



Active Instance: **C:\Program Files\11.2.46** [Change](#)

URL: <http://LGX025/11.2.46/> [Status](#)

Active Connection: **Northwind** [Change](#)

For new users, typically the first step is to become familiar with the product with the goal of creating an instance of Ad Hoc. It is recommended that the documentation is reviewed and tutorials studied prior to creating the first instance. Links are presented 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, some 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.

Note:

The links presented 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.

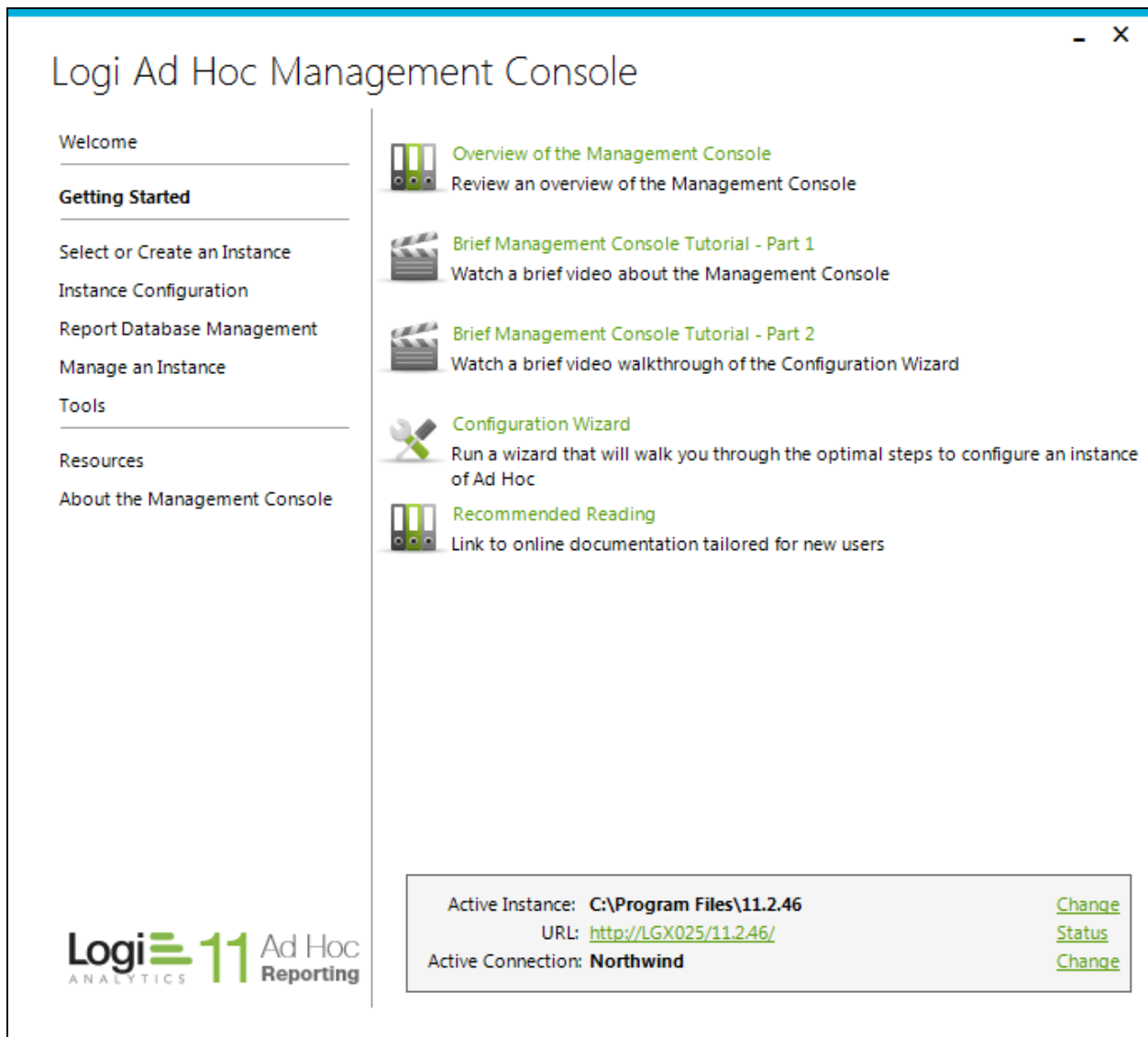
Note:

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 on the Getting Started action group will display the following page:



The screenshot shows the Logi Ad Hoc Management Console interface. On the left is a navigation menu with the following items: Welcome, **Getting Started**, Select or Create an Instance, Instance Configuration, Report Database Management, Manage an Instance, Tools, Resources, and About the Management Console. The main content area displays several actions under the 'Getting Started' section:

- Overview of the Management Console**: Review an overview of the Management Console (icon: folder)
- Brief Management Console Tutorial - Part 1**: Watch a brief video about the Management Console (icon: clapperboard)
- Brief Management Console Tutorial - Part 2**: Watch a brief video walkthrough of the Configuration Wizard (icon: clapperboard)
- Configuration Wizard**: Run a wizard that will walk you through the optimal steps to configure an instance of Ad Hoc (icon: wrench and screwdriver)
- Recommended Reading**: Link to online documentation tailored for new users (icon: folder)

At the bottom right, a status box displays the following information:

- Active Instance: **C:\Program Files\11.2.46** [Change](#)
- URL: <http://LGX025/11.2.46/> [Status](#)
- Active Connection: **Northwind** [Change](#)

The Logi Analytics 11 Ad Hoc Reporting logo is visible in the bottom left corner of the interface.

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 – will demonstrate the basic MC navigation and show the expected usage of the Configuration Wizard

Configuration Wizard – launches a wizard that walks 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

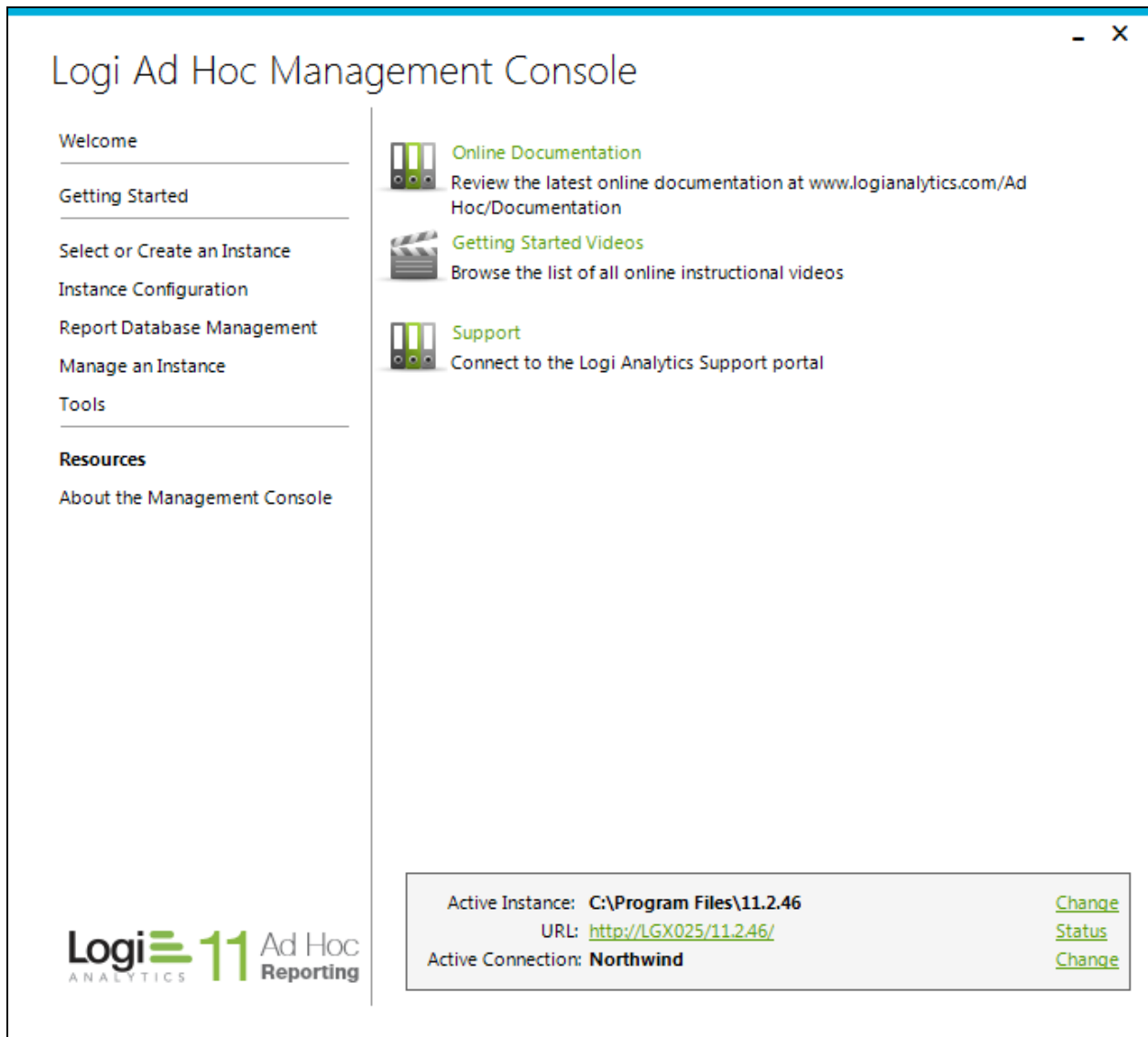
Note:

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.

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 on the Resources action group to display the following page:



The screenshot shows the Logi Ad Hoc Management Console interface. On the left is a navigation menu with the following items: Welcome, Getting Started, Select or Create an Instance, Instance Configuration, Report Database Management, Manage an Instance, Tools, Resources, and About the Management Console. The 'Resources' item is selected. The main content area displays three resource links, each with a folder icon: 'Online Documentation' (Review the latest online documentation at www.logianalytics.com/AdHoc/Documentation), 'Getting Started Videos' (Browse the list of all online instructional videos), and 'Support' (Connect to the Logi Analytics Support portal). At the bottom right, a status box shows: Active Instance: C:\Program Files\11.2.46 (with a 'Change' link), URL: <http://LGX025/11.2.46/> (with a 'Status' link), and Active Connection: Northwind (with a 'Change' link). The Logi Analytics 11 Ad Hoc Reporting logo is visible in the bottom left corner of the console window.

Note:

To access the Support portal, authentication credentials must be supplied. Please contact Customer Service to acquire the credentials.

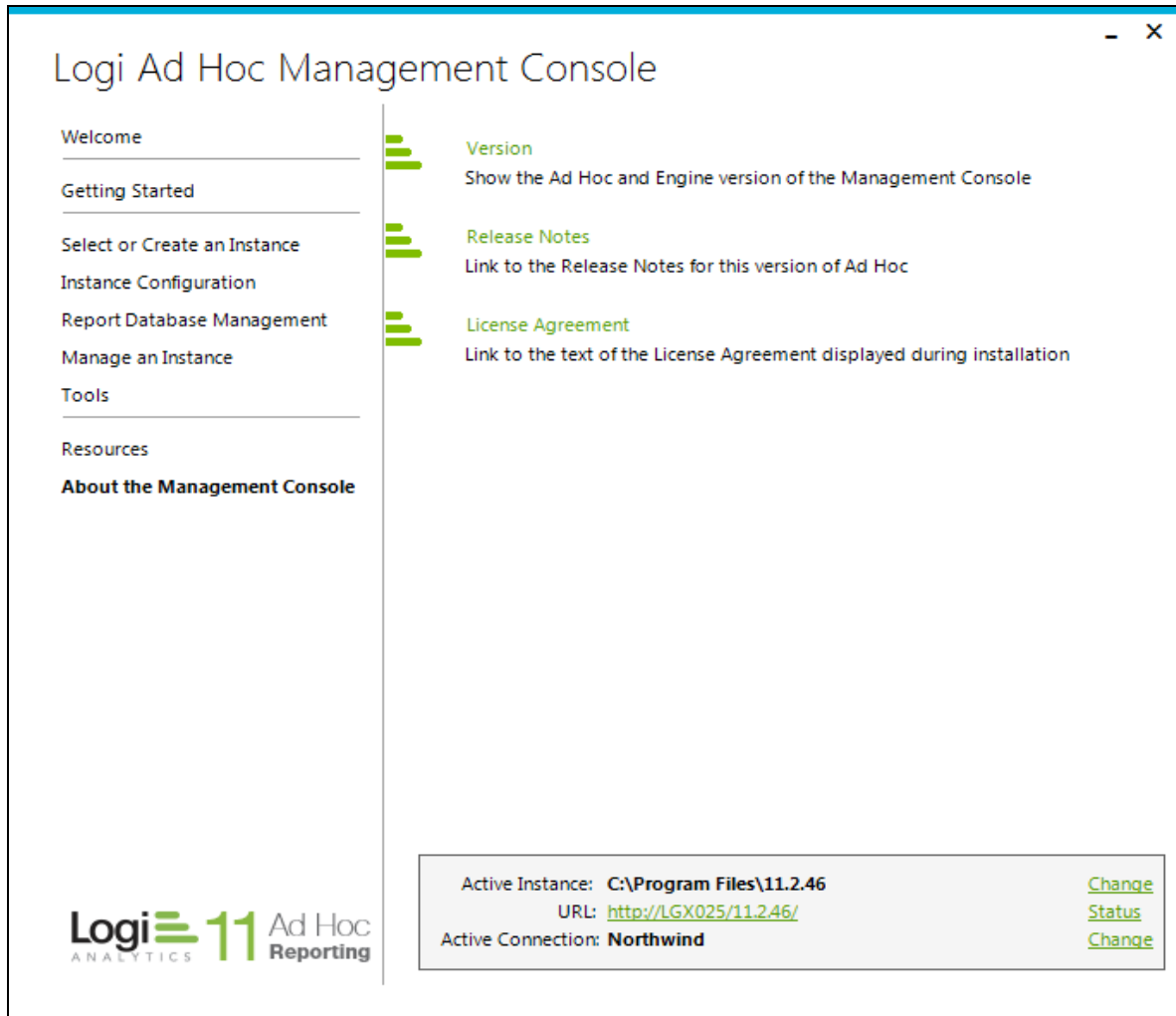
Note:

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.

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 acknowledged as part of the installation.

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



Note:

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.

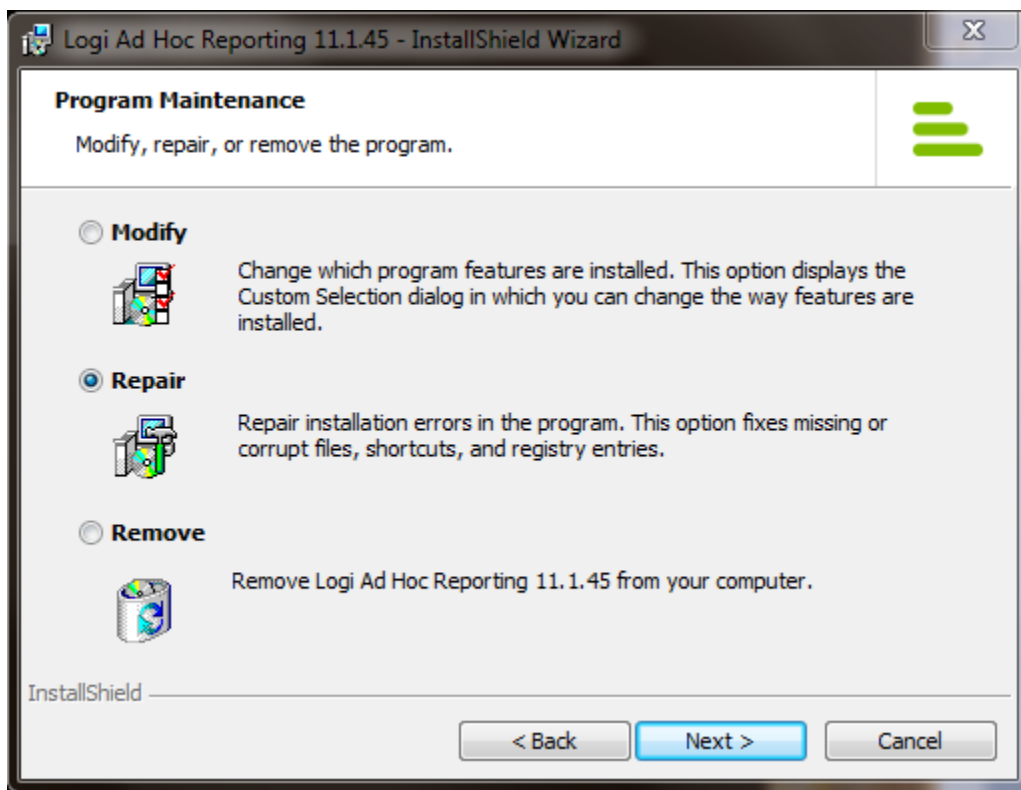
Manage the Management Console

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

The same installation executable 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 may be repaired by executing the installation package. The installation wizard will eventually present the following dialog:



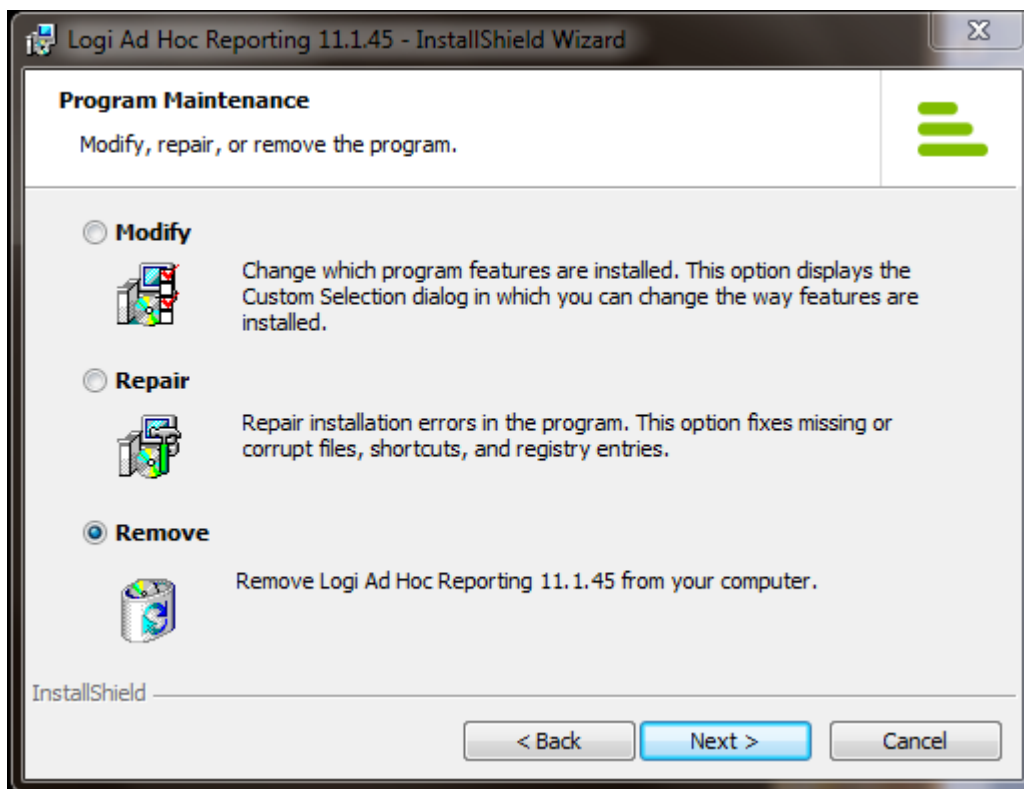
Select the *Repair* option and click on the **Next** button. Continue through the installation wizard steps. The installation program will install the necessary files.

Remove

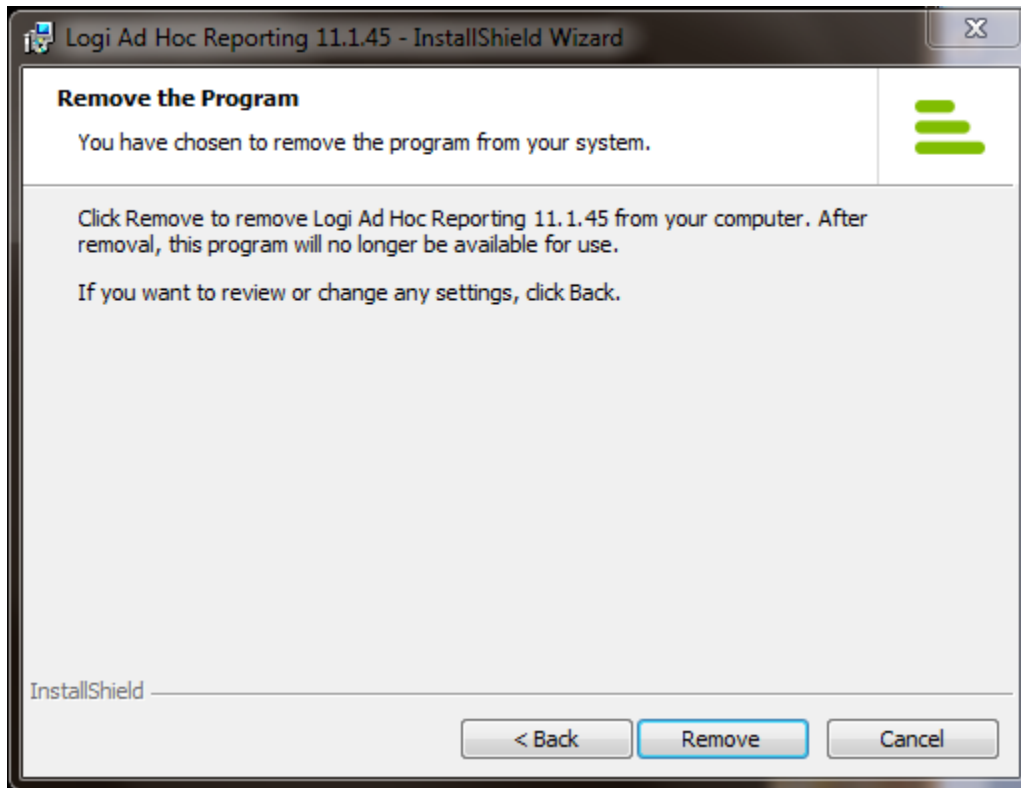
The MC may be removed by exercising the installation program and selecting the *Remove* option.

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.



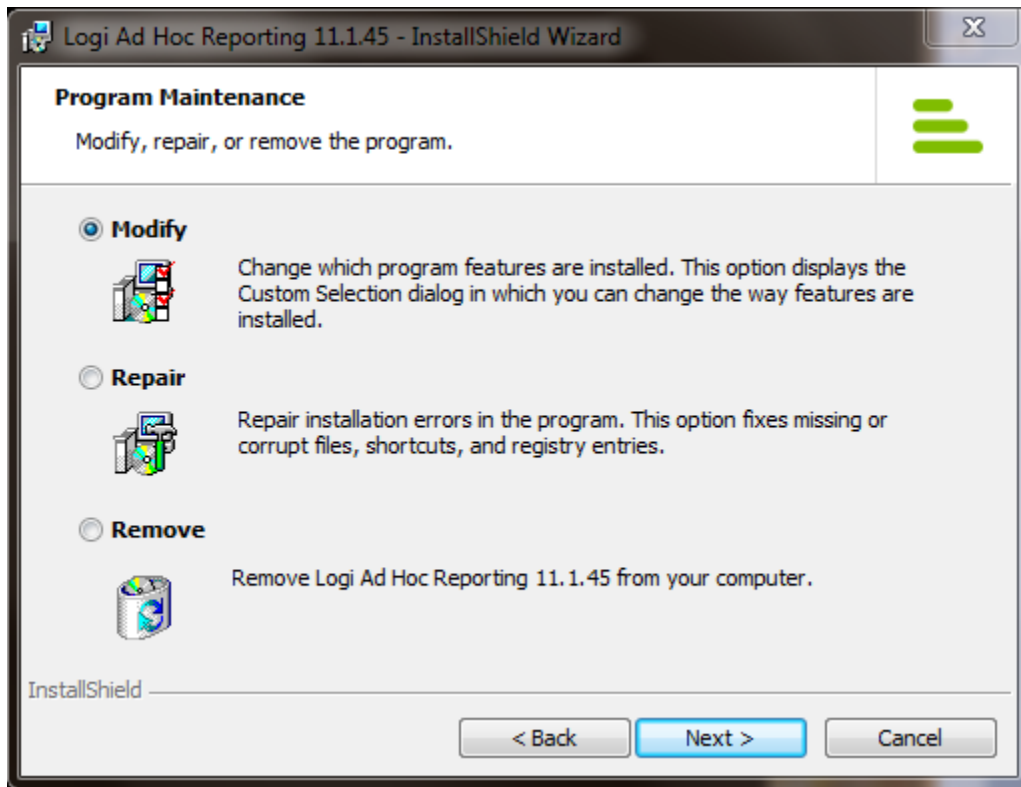
Select the *Remove* option and click on the **Next** button. The following dialog will be presented:



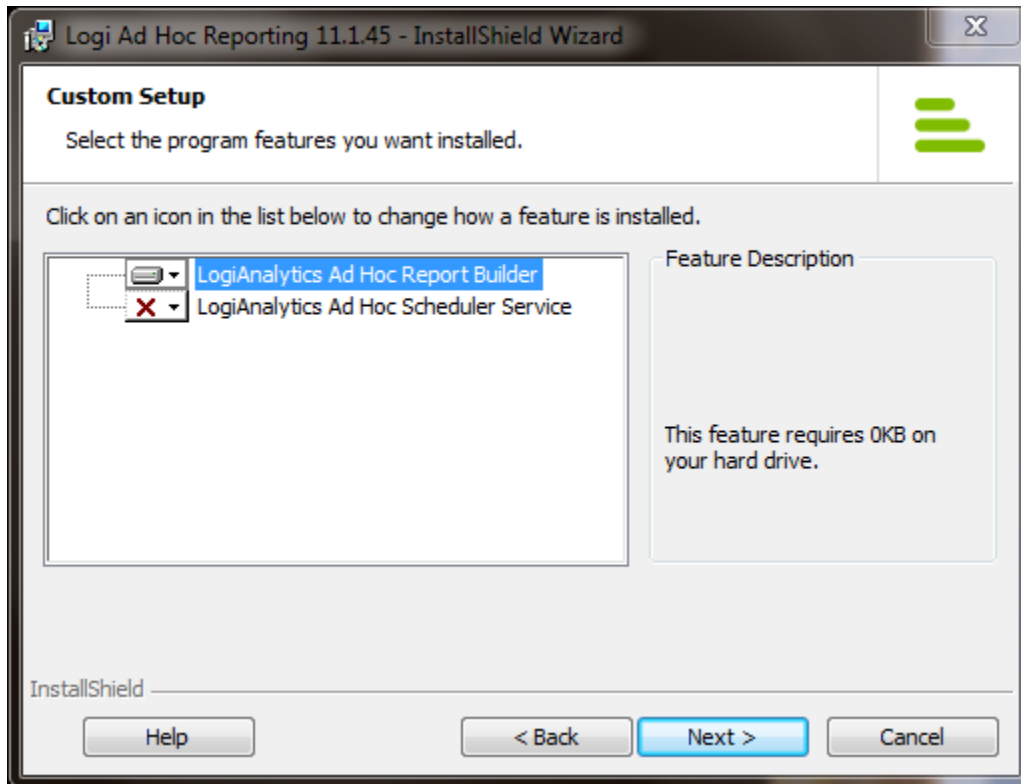
Click on the **Remove** button to continue the process.

Modify

The installation program installs the Management Console by default. It may also install the *Logi Ad Hoc Scheduler Service*. To install the Scheduler Service, launch the installation program and the following dialog will be presented:

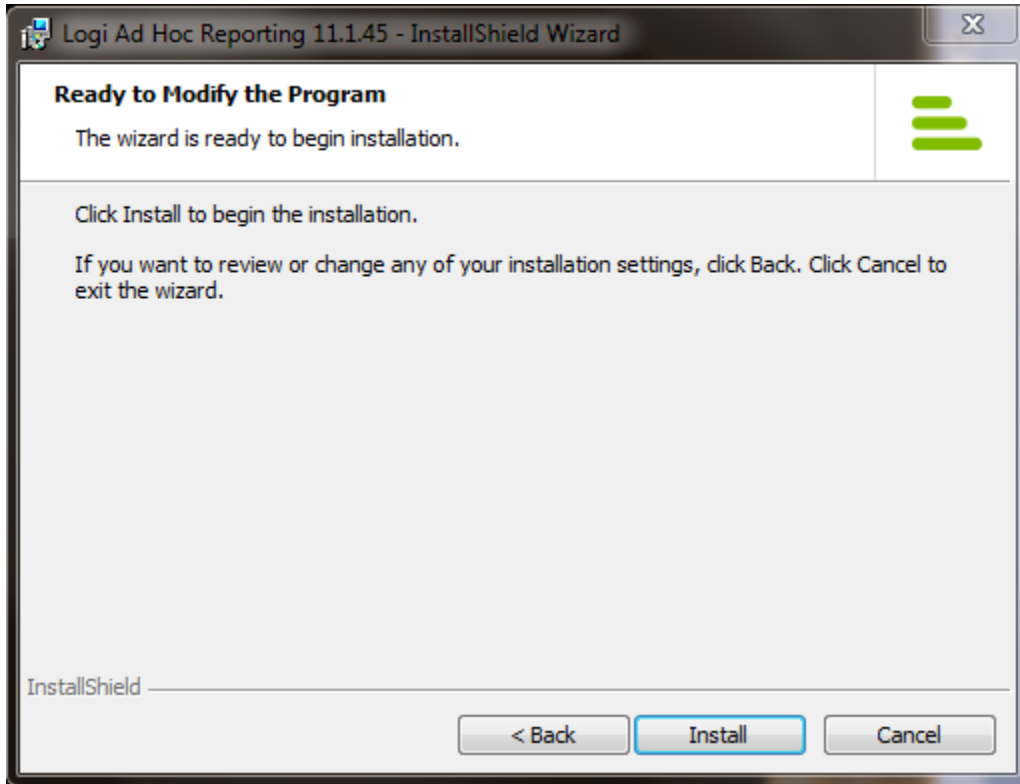


Select the *Modify* options and click the **Next** button. The **Custom Setup** dialog will be displayed.



To indicate that the *Logi Ad Hoc Scheduler Service* should be installed, click on the dropdown list 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 subfeatures, will be installed on local hard drive*”).

Click on the **Next** button and the **Ready to Modify the Program** dialog will be presented.



Click on the **Install** button 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:

Corporate Headquarters

Phone: 1-888-LOGIXML (1-888-564-4965)

(703) 752-9700

Fax: (703) 995-4811

Email: info@logianalytics.com

Address: 7900 Westpark Drive, Suite A200

McLean, VA 22102

Web site: www.logianalytics.com

Sales Department

Phone: 1-888-LOGIXML (1-888-564-4965)

(703) 752-9700

Email: sales@logianalytics.com

Customer Support

Phone: 1-888-LOGIXML (1-888-564-4965)

(703) 752-9700

Link: <http://www.logianalytics.com/support/>