

Logi Ad Hoc Reporting System Administration Guide



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INTRODUCTION

The Logi Ad Hoc System Administration Guide provides information to assist system administrators with the configuration and administration of an Ad Hoc instance.

This Guide covers the features and functionality available to the System Administrator through the Ad Hoc user interface. Configuring users, roles, some application and report settings, and the display and relationship aspects of the reporting database schema may be addressed through the Ad Hoc interface.

For information on configuring an Ad Hoc instance through the Management Console, please refer to the *Management Console Usage Guide*. Most of the reporting schema management, metadata management and enabling of features for an Ad Hoc instance are handled through the Management Console.

Users, roles, and data objects may be managed programmatically using the *Logi Ad Hoc API*. In the folders of the Management Console is an `ahInterfacesample` folder and with a sample application and supporting documentation on the API and configuring the metadata programmatically.

The following information is included in this guide:

- Configuring authentication and authorization
- Configuring database objects for reporting
- Configuring general report settings, archives and schedules
- Sharing reports
- Scheduling reports
- Using permissions
- Special application settings
- Contact information

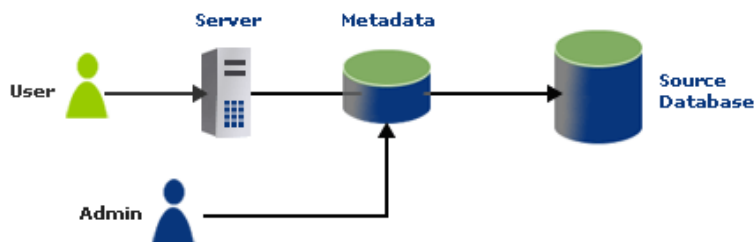
Target Audience

This guide is intended for the system administrator and/or database administrator. The successful configuration of the application requires knowledge of database technologies. For additional technical documentation or support for this or any other Logi Analytics product, please visit our web site at <http://www.logianalytics.com/support/>.

Application Architecture

Ad Hoc uses a *metadata database* to store database schematics and security information. The metadata database is transparent to end users building reports and makes the source database easier to work with. Objects in a database tend to have cryptic labels that are not meaningful for non-technical users building reports. System administrators can assign user-friendly labels to the objects in the database and users can work more easily with those data objects.

The Management Console gives system administrators the ability to store and manage the schema information from multiple reporting databases in the Ad Hoc metadata database. The metadata database only stores the schema for database objects, leaving the data intact within the reporting database. System administrators can work with the metadata database to define fixed parameters to filter records, create user-friendly object and column labels and establish join relationships on the metadata.



Ad Hoc uses *role-based security*, storing role and user account information in the metadata database. System administrators create organizations, users and roles, and specify role-based access rights to objects within the metadata database. Every user must belong to one organization, typically “Default”. The system administrator can assign multiple roles to a single user.

Document Overview

This Guide presents brief descriptions of two administrative scenarios, the Configuration options, and Administrative features generally available to the System Administrator.

The Configuration options are grouped into four functional areas:

- User Configuration – this covers management of users, roles, and permissions as well as organizations and session parameters
- Database Object Configuration – this covers the management of the reporting database schema and the virtual views, catalogs, categories and relationships related to the database objects
- Report Configuration – this covers the management of scheduled and archived reports, report builder settings as well as components that may affect the generation of reports. Cascading filters, presentation styles, and data formats fall into this category
- Application Settings – this covers the administrative settings that affect the general behavior of the Ad Hoc instance. Settings that affect the general behavior of the instance, display and generation of reports, and managing password handling are covered

Administrative features covered by this Guide include:











- Sharing Reports
- Linking Reports
- Permission Rights
- Special Settings

General User Interface

The Ad Hoc user interface has several standard graphical and functional features that provide a consistent utility pattern for the administrator. The following descriptions should be reviewed and understood so that the interface is clearer.

This discussion is specifically focused on the Configuration area of the Ad Hoc interface.

Icons

-  This action icon indicates that there are multiple actions that can be performed on the item. Hover the mousepointer over the icon to display the list of possible actions.
-  This action icon indicates that there is only one action that can be performed on the item. Click on the icon to perform the action.
-  This icon is typically used to close a dialog window.
-  This is the typical drag-and-drop icon or handle. Click on the handle, drag the item to the target location, and release the handle to reposition the item.
-  Click on this icon to show brief help on the page
-  These arrows are typically used to move items between lists.
-  Click on this icon to display a brief help panel for the associated attribute.
-  Clicking on this icon will display a calendar control as an alternative way to enter a date.
-  This pair of icons is typically used to move selected items up or down in a list.
-  This tab icon indicates that there are additional tabs to the right or to the left, respectively.

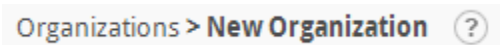
Controls



This paging control may be shown, depending on the configuration settings, at the bottom of the pages with lists of items. From left to right the icons are “first page”, “previous page”, “go to page number”, “next page”, and “last page”.



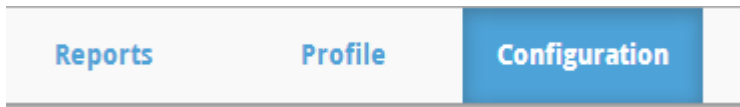
This search control may be shown, depending on the configuration settings, on a list page. Enter text into the search text box and click on the “find” button. The find button caption will indicate the type of item being searched. The search is a “contains” operator. Clicking on the “x” will clear the search box and present the full list of items.



A breadcrumb trail is displayed at the top of most pages in the **Configuration** area. The breadcrumb trail may be used to orient the user and navigate back through various pages. The Help icon will display brief help on the purpose and interactions available on the page.

Configuration

All of the configuration options available to the System Administrator in Ad Hoc are accessed through the **Configuration** button in the main menu at the top of the page.



The configuration pages are organized into those that affect users, database objects, reports and the application. When the configuration button clicked, the following tabs are presented:



Each tab offers a dropdown list of related pages. In addition, text based links to the various related pages are presented on the remainder of the page.

User Configuration	Database Object Configuration	Report Configuration
<p>Logi Ad Hoc Reporting gives administrators the ability to create and manage the following user configuration features:</p> <ul style="list-style-type: none"> Organizations Roles Users Permissions <p>Organizations:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new organization. Manage my existing organizations. Create and manage session parameters for organizations. Define session parameters for organizations. <p>Roles:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new user role. Manage my existing user roles. Configure object-level access to my user roles. <p>Users:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new user account. Modify an existing user account. <p>Permissions:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new permission. Manage my existing permissions. 	<p>Logi Ad Hoc Reporting gives administrators the ability to manage the following database object configuration features:</p> <ul style="list-style-type: none"> Data Objects Virtual Views Relationships <p>Data Objects:</p> <p>I want to ...</p> <ul style="list-style-type: none"> View a list of database objects. Configure data object columns. Group data objects in various categories. Create and manage relationships between data objects. Configure object-level access rights. Create and manage session parameters for record-level access. Define fixed parameters for data objects. Configure links. <p>Virtual Views:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new virtual view. Manage my existing virtual views. <p>Relationships:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new data object relationship. Manage my existing data object relationships. 	<p>Logi Ad Hoc Reporting gives administrators the ability to manage the following report configuration features:</p> <ul style="list-style-type: none"> Report Builder <ul style="list-style-type: none"> Cascading Filters Presentation Styles Data Formats Archives Scheduled Reports Report Settings Application Settings <p>Report Builder:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Create a new cascading filter. Manage my existing cascading filters. Create or manage presentation styles. Create or manage data formats. <p>Schedules & Archives:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Manage the report schedules. Manage the report archives. <p>Report Settings:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Configure general settings for all reports. <p>Application Settings:</p> <p>I want to ...</p> <ul style="list-style-type: none"> Configure general application settings. <p style="text-align: right;">Get Screenshots</p>

The *User Configuration* dropdown list presents links to the management pages for:

- *Organizations* – all users must be members of an organization. For most configurations, all users would be members of the “Default” organization. Since that is the case for most configurations, the ability to have multiple organizations is disabled initially. When this is disabled, the organizations link is not shown in the dropdown list or in the text body of the page.
- *Roles* – every user must have at least one role assigned to them. A user is granted the sum of the permissions of their assigned roles. A role is a collection of permissions.
- *Users* – the logon ID, display name, email address and password are identified on this page. A user’s role(s) may also be set on this page.
- *Permissions* – permissions (also referred to as permission packages) are collections of rights. Eleven permission packages are distributed with Ad Hoc representing the most common grouping of rights. Every role must contain one or more permissions.
- *Session Parameters** - Session parameters are part of the .NET Framework and hold a specific value for the duration of the user session. Each session parameter is initialized with a specified value when users log in to the application.

*** - If Organizations are enabled, the *Session Parameters* link appears under *User Configuration* since session parameters may be set/overridden at the Organization level. If not, the *Session Parameters* link appears under *Application Configuration* since the scope of session parameters is generally application wide.**

The *Database Object Configuration* dropdown presents links to the management pages for:

- *Categories* – categories provide a mechanism to organize and group data objects. For example, the System Administrator may identify all of the data objects related to sales into a category called “Sales”. End users would not have to sift through all of the possible data objects to locate the data related to sales. Categories are presented as a special filter in the Report Builder.
- *Data Objects* – data objects are the source of data for a report. Data objects may be the Ad Hoc representation of tables and views found in a

reporting database, the result of a virtual view definition, or the result of a catalog definition. The typical management of a data object includes showing or hiding columns, creation of user-defined columns, specification of friendly names of the object and columns, definition of object filters, and the configuration of automatic links from the columns.

- *Catalogs* – A catalog is a predefined collection of related data objects and columns. Catalogs are used to simplify data object selection for the end user.
- *Virtual Views* - A virtual view is essentially a pre-defined SQL Select statement. Typically virtual views are used to relate multiple tables, perform data conversions, and reduce the number of data objects that the end user sees.
- *Relationships* - Relationships are the pre-defined join conditions between two data objects.

The *Report Configuration* dropdown presents links to the management pages for:

- *Cascading Filters* - The term cascading filter refers to a series of user input drop-down menus where the value selected in the first drop-down affects the values displayed in the second drop-down and so forth. Cascading filters have no default values but instead rely on user input at runtime.
- *Presentation Styles* – A presentation style is a display class that must exist in the current default cascading style sheet. Presentation styles are used for conditional styling and labels added to a report.
- *Data Formats* – A data format is a named display pattern for data. The format specification follows the Visual Basic patterns. Most of the common display formats are preconfigured in Ad Hoc and may not be deleted.
- *Scheduled Reports** – This link allows the System Administrator to manage the existing report schedules from a central location. * - This link will not be shown if scheduling is not enabled for the Ad Hoc instance.
- *Archives** - This link allows the System Administrator to manage the report archives from a central location. * - This link will not be shown if archiving is not enabled for the Ad Hoc instance.
- *Report Settings* – allows the System Administrator to control some of the functionality and behavior of the Report Builder and presentation of the generated reports.

The *Application Configuration* dropdown presents links to the management pages for:

- *Application Settings* - allows the System Administrator to control some of the functionality and behavior of the Ad Hoc user interface. The options are grouped into General, Configuration Menu, Report, and Password areas.
- *Session Parameters** - Session parameters are part of the .NET Framework and hold a specific value for the duration of the user session. Each session parameter is initialized with a specified value when users log in to the application.

*** - If Organizations are enabled, the *Session Parameters* link appears under *User Configuration* since session parameters may be set/overridden at the Organization level. If not, the *Session Parameters* link appears under *Application Configuration* since the scope of session parameters is generally application wide.**

Note:

Users assigned to the **System Admin** role, or users with the **Administration** and/or **Administer Organizations** permissions assigned have access to the *Configuration* tab.

If more than one organization is configured for use in the Ad Hoc instance, the main menu may be adjusted to permit the System Administrator to filter or target their actions to the selected item in the list.



The Organization drop-down list allows system administrators to toggle between the different organizations available in the Ad Hoc instance. System administrators can use the Organization drop-down list to limit the configuration scope or filter the report list for a specific organization. The users, archives and scheduled reports are filtered by the Organization drop-down list.

Chapter 1

User Configuration

Ad Hoc gives system administrators the ability to create and manage the following user configuration options:

- Organizations
- Roles
- Users
- Permissions
- Session Parameters

Hint:

*Ad Hoc can integrate with other authentication schema. Refer to the **Software Integration Guide** for more details.*

Authentication is handled through user accounts. Every user that accesses Ad Hoc must have a valid user account. User accounts are grouped organizations. Each user account must belong to one and only one organization.

Note:

Organizations are treated as wholly separate companies. Organizations don't share data or reports. Most customers rely on the "Default" organization and all users are members. Consequently, the ability to have multiple organizations must be specifically enabled through the Management Console. Refer to the *Management Console Usage Guide* for instructions on enabling the multiple organization capability.

Authorization is handled through roles and permissions. Ad Hoc provides over 75 different application rights to assign to users. System administrators can create custom permission packages or use the predefined permission packages, and then assign individual permissions to user roles. Roles may then be assigned to organizations. The roles assigned to a specific organization determine the roles *available* for members of that organization.

Note:

Unlike Microsoft Windows' authorization schema, assigning a role to an organization does not automatically assign that role to all members of the organization. Roles must be assigned individually to each user account.

Organizations

Ad Hoc gives the system administrator the ability to establish multiple organizations which are collections of user communities. Every Ad Hoc user must be a member of one organization, typically the “Default” organization.

Organizations generally do not share user communities, reports, or data.

Note:

The ability to define multiple organizations must be enabled via the Management Console. Refer to the Management Console Usage Guide for details.

Select **Organizations** from the *User Configuration* drop-down list to display the *Organizations* configuration page.

Organizations ?

Add Delete



<input type="checkbox"/>	Organization	Actions
<input type="checkbox"/>	Default	>
<input type="checkbox"/>	Human Resources	>

Note:

The *Default* organization is created with every new installation of the application. System administrators can rename the organization, but it may not be deleted. When attempting to delete the *Default* organization, all members are deleted, except for the System Administrator.

The **Add** button will display an empty *Organization* page.

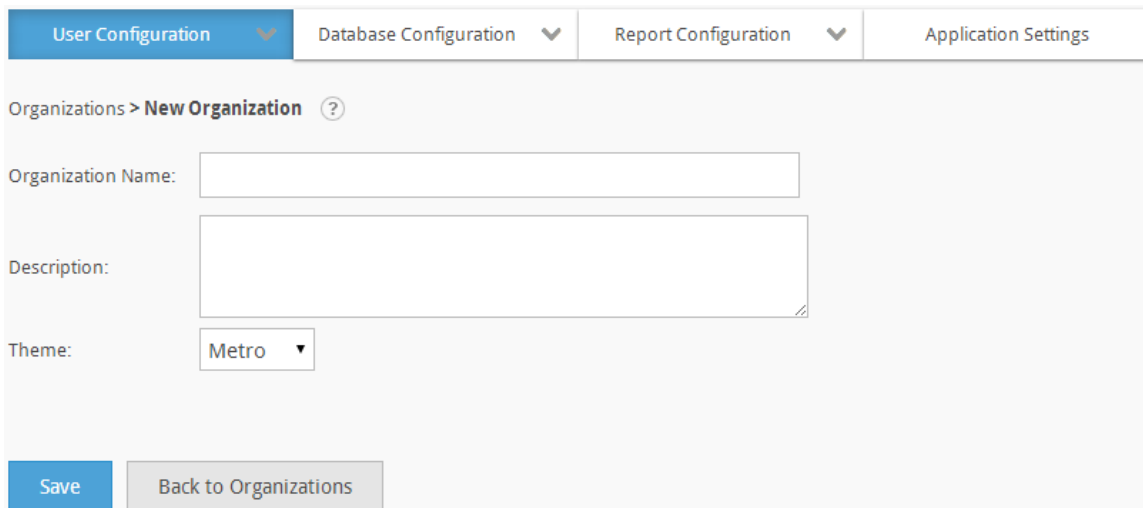
The **Delete** button will remove the selected organizations. Organizations are selected by clicking on the applicable checkbox.

The  icon indicates that more than one action can be performed on the organization. Hover the mouse over the  icon to display the available actions and click on the appropriate one.

The available actions on the *Organizations* page are **Modify Organization**, **Delete Organization** and **Set Session Parameters**. The **Set Session Parameters** option will only be displayed if a session parameter has previously been created for the application.

Adding an Organization

To add an organization, click on the **Add** button and the *Organization* page will be displayed:



The screenshot shows a navigation bar with four items: 'User Configuration' (selected), 'Database Configuration', 'Report Configuration', and 'Application Settings'. Below this is a breadcrumb trail: 'Organizations > New Organization'. The form has three main sections: 'Organization Name' with a text input field, 'Description' with a larger text area, and 'Theme' with a dropdown menu currently showing 'Metro'. At the bottom of the form are two buttons: a blue 'Save' button and a grey 'Back to Organizations' button.

The *Organization Name* is required and must be unique. The *Description* of the organization is optional.

Click on the **Save** button to store the new Organization information.

The *Modify Organization* page will be displayed (see below).

Adding an Organization Using “Save As”

The administrator can create an organization by modifying an existing organization and then saving it with a new name by clicking on the **Save As** button. The **Save As** option also copies the session parameters and values, if any, from the existing organization to the new organization.

Modifying Organizations

System administrators can change the name, description, and theme of an organization at any time. Each organization must have a unique name.

To change organization information, click the **Modify Organization** action for the organization. The *Modify Organization* page will be displayed:

The screenshot displays the 'Modify Organization' interface. At the top, there are three configuration tabs: 'User Configuration' (selected), 'Database Configuration', and 'Report Configuration'. Below the tabs, the breadcrumb path is 'Organizations > 'Human Resources' Organization'. The main form contains the following fields:

- Selected Organization:** A dropdown menu currently showing 'Human Resources'.
- Organization Name:** A text input field containing 'Human Resources'.
- Description:** A large, empty text area for entering a description.
- Theme:** A dropdown menu currently showing 'Metro'.

At the bottom of the form, there are three buttons: a blue 'Save' button, a grey 'Save As...' button, and a grey 'Back to Organizations' button.

Modify the *Organization Name* or *Description* and click the **Save** button to store the information.

To save the edited information by a new *Organization Name*, click on the **Save As** button, enter the new name and click on the **OK** button to save the information.

Note:

The *Selected Organization* drop-down list may be used to navigate through organizations and avoid using the **Back to Organizations** button and selecting a different organization.

Setting an Organization's Session Parameters

System administrators can create multiple session variables called *session parameters* that may be used for display purposes or to filter data within a report or data object. Session parameters and values are initially defined with application scope. The session parameter values may be over-riden for each organization.

To change the session parameter values for an organization, click on the **Set Session Parameters** action for the organization. The *Organization Session Parameters* page will be displayed:

Organizations > Session Parameters for Organization 'Human Resources' ?

Selected Organization: Human Resources ▾

Restore Defaults

<input type="checkbox"/>	Parameter Name	Type	Default Value	Follow Default	Parameter Value	Actions
<input type="checkbox"/>	Country	Text	CA	<input checked="" type="checkbox"/>		>

Save Back to Organizations

Note:

If Session Parameters have not been defined, the option to over-ride the session parameter values for organizations will not be available.

Hint:

Refer to the **Session Parameters** chapter for help creating parameters and setting the default values.

The *Selected Organization* identifies the organization that was the action target from the previous page. The dropdown list allows the Administrator to select

other organizations and review or adjust their session parameters without having to return to the Organizations page.

The grid presents the session parameters that may be set for the organization. Click on the *Parameter Name* or the *Follow Default* column header to sort the contents of the grid.

The **Restore Defaults** button provides a mechanism to set all of the highlighted (checked) session parameters back to the values shown in the *Default Value* column.

The *Follow Default* checkbox indicates whether the parameter value should adopt the *Default Value*. This also allows the parameter value to be set “permanently”, meaning that changes to the *Default Value* will have no impact on the parameter value for the organization, if the *Follow Default* checkbox is unchecked.

The grayed *Parameter Value* text boxes are not disabled. The gray is a visual cue that the value is the same as the default value and is expected to follow the default value. That mean that if the default value changes, the organization will automatically pick up the new value.

The *Parameter Value* may be changed by either typing directly into the text box or selecting the **Modify** action and providing a new value. The parameter value may also be changed by selecting the **Restore Default** action.

If any *Parameter Value* is set it will be considered an override value and the “*Follow Default*” checkbox will automatically be unchecked.

Click on the **Save** button to store the session parameter values for the organization.

An action that is available for each session parameter is **Set By User**. Clicking on this action will present a page that allows the session parameter values to be set for all users in the organization.

User Configuration ▾
Database Configuration ▾
Report Configuration ▾
Application

Session Parameters > Organization Session Parameters > **Session Parameter 'Country' for Users** ?

Selected Session Parameter: Country ▾

Type: Text

Default Value: CA

Role: All ▾

Restore Default
Set Value

	User	Follow Default	Parameter Value	Actions
<input type="checkbox"/>	Admin	<input checked="" type="checkbox"/>	<div style="border: 1px solid #ccc; width: 100px; height: 20px;"></div>	>
<input type="checkbox"/>	jim	<input checked="" type="checkbox"/>	<div style="border: 1px solid #ccc; width: 100px; height: 20px;"></div>	>

Save
Back to Session Parameters

The *Selected Session Parameter* initially identifies the parameter that was specified when linking to this page. The dropdown list allows the Administrator to review and modify other session parameter values for the group of users.

The *Default Value* is the value that will be used for all of the users in the list unless the value is specifically over-ridden.

The *Type* indicates one of the five session parameter types; date, number, numeric list, text and textual list.

The *Role* dropdown list may be used to filter the list of users. Initially the dropdown indicates “All” and the list of user are all users in the Organization.

The **Restore Default** button will set the session parameter value for all selected users back to the displayed Default Value. Users may be selected by clicking on the checkbox next to the user. All users may be selected by clicking on the checkbox in the list header.

The **Set Value** button will open a dialog to acquire a new value and will apply the value to all of the selected users.

The list of users may be sorted by clicking on the *User* or *Follow Default* column header.

The *Follow Default* checkbox indicates whether the parameter value should adopt the *Default Value*. This also allows the parameter value to be set “permanently”, meaning that changes to the *Default Value* will have no impact on the parameter value for the user, if the *Follow Default* checkbox is unchecked.

The grayed *Parameter Value* text boxes are not disabled. The gray is a visual cue that the value is the same as the default value and is expected to follow the default value. That mean that if the default value changes, the user will automatically pick up the new value.

The *Parameter Value* may be changed by either typing directly into the text box or selecting the **Modify** action and providing a new value. The parameter value may also be changed by selecting the **Restore Default** action.

If any *Parameter Value* is set it will be considered an override value and the “*Follow Default*” checkbox will automatically be unchecked.

To change the parameter value, either enter the new value in the *Parameter Value* text box or hover the mousepointer over the *Actions* > icon and select **Modify** from the list of actions.

The **Modify** action will present a dialog relevant to the type of the session parameter. “Date” session parameters will have a date picker control and “List” session parameters will present a list of values in the dialog.

From the *Actions* icon, the session parameter value for the related user may be reset to the default value for the Organization by clicking on the **Restore Default** option.

Click on the **Save** button to store the session parameter values for the User.

Roles

A user's roles determine what the user is authorized to do within Ad Hoc. Access to features within Ad Hoc, databases, objects and columns are all controlled by the rights afforded to the user through all of their assigned roles.

A *role* is comprised of one or more packages of rights, called *permissions* or *permission packages*. Roles are associated with organizations and then assigned to individual users within the organization.

Select **Roles** from the *User Configuration* drop-down list to display the *Roles* configuration page.

The screenshot shows the 'Roles' configuration page. At the top, there is a navigation bar with four tabs: 'User Configuration' (selected), 'Database Configuration', 'Report Configuration', and 'Application'. Below the navigation bar, the 'Roles' section is displayed. It includes a title 'Roles' with a help icon, an 'Add' button, and a 'Delete' button. Below these buttons is a table with the following structure:

<input type="checkbox"/>	Role Name	Actions
<input type="checkbox"/>	Non Admin	>
<input type="checkbox"/>	System Admin	>

The **Add** button will display an empty *Role* page.

The **Delete** button will remove the selected roles. Roles are selected by clicking on the applicable checkbox.

Notes:

1. If a user has multiple roles assigned, that user will lose the role that the system administrator deletes. If a user has only one role assigned and it is removed, that user no longer has access to the Ad Hoc instance..
2. A user may not delete a role that is currently assigned to their User account.

The > icon indicates that more than one action can be performed on the role. Hover the mouse over the > icon to display the available actions and click on the appropriate one.

The available actions on the *Roles* page are **Modify Role**, **Delete Role** and **Set Data Object Access Rights**.

Adding a Role

To add a role, click on the **Add** button and the *Role* page will be displayed:

User Configuration Database Configuration Report Configuration

Roles > **New Role** ?

Role:

Description:

Role Permissions

Available Permissions	Assigned Permissions
Access Configuration Area	
Administer Organization	
End User	
Manage All Personal Reports	
Manage My Personal Reports	
Manage Shared Reports	
Power End User	
Schedule and Archive Reports	
System Administration	
View My Personal Reports	
View Shared Reports	

Role Organizations

Available Organizations	Assigned Organizations
Human Resources	Default

Role Databases

Available Databases	Assigned Databases
Small Northwind	Northwind

Role Users

The *Role* is required and must be unique. The *Description* of the role is optional. Assign *Permissions*, *Organizations*, *Databases* and *Users* from the respective *Available* list boxes.

Click on the **Save** button to store the new Role information.

Note:

Every role must have at least one organization assigned, typically the “*Default*” organization. If the Ad Hoc instance only has the “Default” organization defined, the Available/Assigned Organization control will not be shown.

Adding a Role Using “Save As”

The administrator can create a role by modifying an existing role and then saving it with a new name by clicking on the **Save As** button. The **'Save As'** option also copies the data object access right settings from the existing role to the new role.

Modifying Roles

System administrators can change the Role name, description, and the assigned permissions, organizations, databases and users.

To change the Role information, click the **Modify Role** action for the role. The *Modify Role* page will be displayed.

Modify the *Role*, *Description* or assignments and click the **Save** button to store the information.

To save the edited information by a new *Role* name, click on the **Save As** button, enter the new name and click on the **OK** button to save the information.

Note:

The *Selected Role* drop-down list may be used to navigate through roles and avoid using the **Back to Roles** button and selecting a role.

Note:

The *System Admin* role must have an assigned user named *Admin*

Setting a Role's Data Object Access Rights

System administrators can limit access to data objects for each role created in Ad Hoc. Access rights can be granted at the column-level or data object-level. Modify access rights to a data object by specifying access levels for each column of the object.

Note:

The **System Admin** role always has **Full** access rights to all data objects and columns within each data object.

The *Object Access Rights* page allows the system administrator to specify access rights to specific data objects. By default, all roles associated with the current reporting database have *Full* access to all objects and columns in the current reporting database.

The three levels of access for data objects are:

- Full - all columns are accessible
- Limited - some columns are accessible
- None - no columns are accessible

The two levels of access for individual columns are:

- Full - column available for reporting
- None - no access

To change the access to columns, click on the **Set Data Object Access Rights** action for the role. The *Object Access Rights* page will be displayed for the selected role:

User Configuration Database Configuration Report Configuration Application

Configuration > Roles > **Object Access Rights for 'Non Admin' Role** ?

Selected Role: Non Admin

Database: Reporting Metadata

Set To Full Set To None

<input type="checkbox"/>	Data Object	Type	Access	Actions
<input type="checkbox"/>	Columns	Table	Full	
<input type="checkbox"/>	Objects	Table	Full	
<input type="checkbox"/>	Friendly Name: Source Database Name: SourceDatabase	Table	Full	
<input type="checkbox"/>	Friendly Name: User Report Name: UserReport	Table	Full	
<input type="checkbox"/>	Users	Table	Full	

Back to Roles

The *Database* dropdown list allows the System Administrator to select the pool of objects for the database.

The *Data Object* column lists all data objects. The *Type* column displays the object type and the *Access* column displays the access type for each data object.

Note:
The default access type for each data object and all columns is *Full*.

Note:
Column permissions for the *System Admin* role cannot be modified for any data object.

Click on the  icon to **Modify Column Access Rights** and display the **Column Access Rights** dialog.

✕
Column Access Rights for 'Categories' object

Set To Full

Set To None

<input type="checkbox"/>	Column Name	Label	Access
<input type="checkbox"/>	CategoryID	Category ID	Full
<input type="checkbox"/>	CategoryName	Category Name	Full
<input type="checkbox"/>	Description	Description	Full

OK

Cancel

Using the checkboxes, select the appropriate columns and click on the **Set to Full** or **Set to None** buttons to change the access for the columns for the respective role and data object.

Click on the **Save** button to store the configuration.

Hint:

Quickly switch between roles by choosing the role from the drop-down menu provided. Select one or more checkboxes and click **Set to Full** or **Set to None** to make fast access changes to objects in the metadata database. Click **Copy Permissions** and then choose a role to quickly duplicate permissions between user roles.

Users

A username and password are required to access the application. Administrators assign each individual a username and password. Users are members of a particular organization, typically “Default”, and have one or more assigned roles for access to specific data objects and application features.

Select **Users** from the *User Configuration* drop-down list to display the *Users* configuration page.

<input type="checkbox"/>	Username	Name	User Roles	Actions
<input type="checkbox"/>	Admin	Administrator	System Admin	>
<input type="checkbox"/>	jim	User Jim	Non Admin	>

Hint:

Change the default password for the **Admin** user after installing the application. The default password is "password".

The **Add** button will display an empty *User* page.

The **Delete** button will remove the selected users. Users are selected by clicking on the applicable checkbox.

Note:

Deleting users from the application permanently erases any reports that user may have created, except for their shared reports. Any users created by the administrator can be edited and removed. If user's access is to be denied, it is recommended that their account be locked or change their password instead of deleting their account.

Three actions are available for a User; **Modify User**, **Delete User** and **Set Session Parameters**. Hover the mousepointer over the > icon to show the available actions.

Adding a User

To add a user, click on the **Add** button and the *User* page will be displayed:

User Configuration Database Configuration Report Configuration

Users > **New User** ?

Username:

Password:

First Name:

Last Name:

Email Address:

Locked:

User Roles

Available Roles

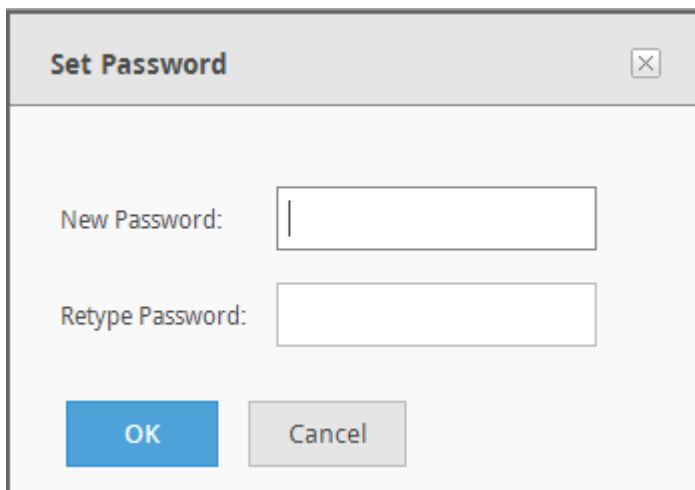
- Non Admin
- System Admin

Assigned Roles

The *Username* is required and must be unique. A *Password* must be set for each user. The *First Name* and *Last Name* are optional and are only used for display

purposes. The *Email Address* is optional as well, however, an email address will be necessary for the delivery of scheduled reports. The *Locked* checkbox may be used to restrict access to the Ad Hoc instance for the user. Although a *User Role* does not have to be set when the user is created, one is required for the user to access the Ad Hoc instance.

The *Password* is set by clicking the **Set Password** button and completing the following dialog:



The image shows a 'Set Password' dialog box with a title bar containing the text 'Set Password' and a close button (X). The dialog contains two text input fields: 'New Password:' and 'Retype Password:'. Below the input fields are two buttons: 'OK' (highlighted in blue) and 'Cancel' (greyed out).

After entering the password twice, click on the **OK** button to store the password information.

Note:

The length, strength and change frequency are configurable by the System Administrator through the Management Console and through *Configuration/Application Configuration/Application Settings* in the Ad Hoc instance.

A user must have at least one role assigned to them to access the Ad Hoc instance. They may have multiple roles assigned and will have the cumulative rights of all of their assigned roles.

Click on the **Save** button to store the new User information.

Adding a User Using “Save As”

The administrator can create a user by modifying an existing user and then saving it as a new user by clicking on the **Save As** button.

Modifying Users

System administrators can change a user’s profile at any time.

To change user information, click the **Modify User** action for the user. The *Modify Users* page will be displayed:

The screenshot displays the 'Modify User' interface. At the top, there are three configuration tabs: 'User Configuration' (selected), 'Database Configuration', and 'Report Configuration'. Below the tabs, the breadcrumb 'Users > jim' User Profile' is shown. The form includes the following fields and controls:

- Selected User:** A dropdown menu with 'jim' selected.
- Username:** A text input field containing 'jim'.
- Password:** A text input field with a 'Set Password' button next to it.
- First Name:** A text input field containing 'Jim'.
- Last Name:** A text input field containing 'User'.
- Email Address:** A text input field containing 'jim.mouser@logianalytics.com'.
- Locked:** A checkbox that is currently unchecked.

Below the form is the 'User Roles' section, which consists of two columns:

- Available Roles:** A list box containing 'System Admin'.
- Assigned Roles:** A list box containing 'Non Admin'.

At the bottom of the page, there are three buttons: 'Save' (highlighted in blue), 'Save As...', and 'Back to Users'.

Modify the appropriate information and click the **Save** button to store the information.

To save the edited information by a new *Username*, click on the **Save As** button, enter the new name and click on the **OK** button to save the information.

Note:

The *Selected User* drop-down list may be used to navigate through users and avoid using the **Back to Users** button and selecting a different user.

Set Session Parameters

To set the session parameter values for a user, select the **Set Session Parameters** action. The following page will be displayed:

Users > Session Parameters for User 'jim' ?

Selected User: jim

Restore Defaults

<input type="checkbox"/>	Parameter Name	Type	Default Value	Follow Default	Parameter Value	Actions
<input type="checkbox"/>	Country	Text	CA	<input checked="" type="checkbox"/>		>

Save Back to Users

The *Selected User* dropdown list defaults to the user that was used to link to this page. The dropdown list of users is a convenient mechanism to change the focus of the page to a different user without having to go back to the previous page.

The grid presents all of the session parameters values defined for the user. Click on the *Parameter Name* or *Follow Default* column headers to sort the contents of the grid.

The *Restore Defaults* button will set the values of the selected session parameters to the *Default Value* displayed in the grid.

The *Follow Default* checkbox indicates whether the parameter value should adopt the *Default Value*. This also allows the parameter value to be set “permanently”, meaning that changes to the *Default Value* will have no impact on the parameter value for the user, if the *Follow Default* checkbox is unchecked.

The grayed *Parameter Value* text boxes are not disabled. The gray is a visual cue that the value is the same as the default value and is expected to follow the default value. That mean that if the default value changes, the user will automatically pick up the new value.

The *Parameter Value* may be changed by either typing directly into the text box or selecting the **Modify** action and providing a new value. The parameter value may also be changed by selecting the **Restore Default** action.

If any *Parameter Value* is set it will be considered an override value and the “*Follow Default*” checkbox will automatically be unchecked.

Click on the **Save** button to store the session parameter values for the user.

Permissions

Permissions are collections of related “rights”. Each right identifies a feature or function in Ad Hoc. There are over 75 rights that may be bundled into a permission, also known as a permission package.

One or more permissions are assigned to roles. Roles are then assigned to users.

The Permissions page allows the system administrator to create and manage permissions in the application.

Select **Permissions** from the *User Configuration* drop-down list to display the *Permissions* configuration page.

The screenshot shows the 'Permissions' configuration page. At the top, there is a navigation bar with four tabs: 'User Configuration' (selected), 'Database Configuration', 'Report Configuration', and 'Application Settings'. Below the navigation bar, the page title is 'Permissions' with a help icon. There are two buttons: 'Add' and 'Delete'. The main content is a table with the following columns: 'Permission Name', 'Description', and 'Actions'.

Permission Name	Description	Actions
<input type="checkbox"/> Access Configuration Area	Allows access to the configuration menu and its underlying sub-menus.	>
<input type="checkbox"/> Administer Organization	Allow admin rights in report management area plus user management in configuration for the organization.	>
<input type="checkbox"/> End User	View, create, modify, rename and delete personal reports and folders; archive personal reports; create reports in tabular, bar chart and pie chart presentation formats	>
<input type="checkbox"/> Manage All Personal Reports	Allows view, create, change, rename, and delete all personal reports and folders. Copy is allowed to any destination where "report creation" right exists.	>
<input type="checkbox"/> Manage My Personal Reports	Allows view, create, change, rename, and delete personal reports as well as personal folders. Copy is allowed to any destination where "report creation" right exists.	>
<input type="checkbox"/> Manage Shared Reports	Allows view, create, change, rename, and delete shared reports as well as personal folders. Copy is allowed to any destination where "report creation" right exists.	>
<input type="checkbox"/> Power End User	View, create, modify, rename and delete personal reports and folders; archive personal reports; create reports in tabular, bar chart and pie chart presentation formats	>
<input type="checkbox"/> Schedule and Archive Reports	Allows scheduling and archiving of any reports that are available to view as well as viewing of archived reports	>
System Administration	Allows every right in the application	>
<input type="checkbox"/> View My Personal Reports	Allows viewing of personal reports. Copy is allowed to any destination where "report creation" right exists.	>
<input type="checkbox"/> View Shared Reports	Allows viewing of shared reports. Copy is allowed to any destination where "report creation" right exists.	>

Ad Hoc is distributed with 11 of the most common permission packages pre-defined. All but the System Administration permission package may be edited and deleted.

The **Add** button will display an empty *Permission* page.

The **Delete** button will remove the selected permission. Permissions are selected by clicking on the applicable checkbox.

Note:

The “System Administration” permission package contains all rights and may not be altered or deleted.

Note:

If the permission is assigned to any roles, that permission is removed from those roles when it is deleted.

Two actions are available for a Permission; **Modify Permission**, and **Delete Permission**. Hover the mousepointer over the **>** icon to show the available actions.

Adding a Permission

To add a permission, click on the **Add** button and the permission page will be displayed:

User Configuration Database Configuration Report Configuration Application Settings

Permissions > **New Permission** ?

Permission Name:

Description:

Rights for this Permission

Available Rights	Assigned Rights
Ability to use pre-defined session param	
Archive reports	
Create/Modify/Delete all dashboards from	
Create/Modify/Delete all reports from Sh	
Create/Modify/Delete dashboards from M	
Create/Modify/Delete folders from Globa	
Create/Modify/Delete folders from My Pe	
Create/Modify/Delete folders from Share	
Create/Modify/Delete own dashboards fr	

Save Back to Permissions

The *Permission Name* is required and must be unique. The *Description* is optional. Assign rights to the permission from the list of Available Rights.

Click on the **Save** button to store the new Permission information.

Adding a Permission Using “Save As”

The administrator can create a permission by modifying an existing permission and then saving it as a new permission by clicking on the **Save As** button.

Modifying Users

To change permission information, click the **Modify Permission** action for the permission package. The *Modify Permissions* page will be displayed:

User Configuration
Database Configuration
Report Configuration

Permissions > 'End User' Permission ?

Selected Permission: End User

Permission Name: End User

Description: View, create, modify, rename and delete personal reports and folders; archive personal reports; create

Rights for this Permission

Available Rights

- Ability to use pre-defined session param
- Archive reports
- Create/Modify/Delete all dashboards from
- Create/Modify/Delete all reports from Sh
- Create/Modify/Delete folders from Globa
- Create/Modify/Delete folders from Share
- Create/Modify/Delete own dashboards fr
- Create/Modify/Delete own folders from C
- Create/Modify/Delete own folders from S

Assigned Rights

- Create/Modify/Delete dashboards from M
- Create/Modify/Delete folders from My Pe
- Create/Modify/Delete reports from My Pe
- Delete archives from My Personal Report
- Manage user Preferences
- Rename reports from My Personal Repor
- Right to add bar charts to reports
- Right to add line charts to reports
- Right to add pie charts to reports

Save
Save As...
Back to Permissions

Modify the appropriate information and click the **Save** button to store the information.

To save the edited information by a new *Permission Name*, click on the **Save As** button, enter the new name and click on the **OK** button to save the information.

Note:

The *Selected Permission* drop-down list may be used to navigate through permission packages and avoid using the **Back to Permissions** button and selecting a different permission.

Session Parameters

Session Parameters are documented in Chapter 4 - Application Configuration.

Session parameters are generally defined with “application” scope and are defined and documented under the *Application Configuration* options. By default, the link to the Session Parameter management pages is displayed in the *Application Configuration* drop-down list.

If the ability to specify *Organizations* is enabled, the session parameter’s values may be applied specifically to an organization. In this case, the scope of Session Parameters is closer to *User Configuration* and the link to the Session Parameter management pages is displayed in the *User Configuration* drop-down list.

Chapter 2

Database Object Configuration

Ad Hoc gives system administrators the ability to manage the following database object configuration options:

- Categories
- Data Objects
- Catalogs
- Virtual Views
- Relationships

A *category* is a collection of data objects. Categories are used as a quick filter to narrow the list of data objects that the end user initially has to choose from when creating a report.

A *data object* is equivalent to one table or view from a source database. Data object names come from the associated source database, but administrators can give data objects user-friendly names and descriptions to help users building reports. Both object and record-level access rights to data objects may be specified.

A *catalog* is a type of data object that is a pre-defined set of related data objects and columns. Catalogs are created by the System Administrator to eliminate the need for end users to traverse relationships to select data for reporting. Catalogs are an Ad Hoc feature that prevents end users from having to know and understand that data architecture before creating reports.

A *virtual view* is a data object created by the administrator from existing tables and views within a particular source database. The application stores the virtual view in its metadata database and makes it available to users building reports. Unlike other data objects available for reporting, virtual views exist only in the application metadata. Virtual views are an Ad Hoc feature that prevents end users from having to know and understand that data architecture before creating reports.

Relationships can be established between any two database objects. System Administrators have the ability to define these relationships in order to create reports from multiple data objects. Relationships created in the Ad Hoc instance exist only in the metadata.

Categories

Categories are a convenient mechanism for grouping logically related data objects, making them easier to find. *Categories* are implemented as a filter in the Report Builder data selection dialogs.

Essentially the System Administrator creates one or more categories and assigns data objects to the category. Data objects may appear in more than one category since many data objects are common to different reporting needs (e.g. the States data object may be required to create reports on the Sales data as well as the Human Resources data).

Note:

The System Administrator may also create the *Categories* by using the Management Console. Refer to the *Management Console usage Guide* for details.

Select **Categories** from the *Database Object Configuration* drop-down list to display the *Categories* configuration page.

The screenshot shows the 'Categories' configuration page. At the top, there is a navigation bar with four tabs: 'User Configuration', 'Database Configuration' (which is highlighted in blue), 'Report Configuration', and 'Application'. Below the navigation bar, the 'Categories' section is visible. It includes a 'Database' dropdown menu currently set to 'Northwind'. There are two buttons: a blue 'Add' button and a grey 'Delete' button. Below these buttons is a table with the following structure:

<input type="checkbox"/>	Category Name	Description	Actions
<input type="checkbox"/>	Primary Data Objects		>

The **Database** dropdown list acts as a filter for the Category list. Only data object Categories related to the selected database will be displayed. If only one reporting database has been configured for the Ad Hoc instance, the **Database** filter will not be shown.

The **Add** button will display an empty *Category* page.

The **Delete** button will remove the selected category. Categories are selected by clicking on the applicable checkbox.

Two actions are available for a Category; **Modify Category**, and **Delete Category**. Hover the mousepointer over the > icon to show the available actions.

Adding a Category

To add a category, click on the **Add** button and the category dialog will be displayed:

Category Details [X]

Category Name:

Description:

Objects:

Available Objects

- Categories
- CategoriesW
- Customers
- Employee Territories
- Employees
- Invoices
- Order Details
- Orders
- Products
- Region
- Shippers
- Suppliers
- Territories

Assigned Objects

[OK] [Cancel]

The *Category Name* is required and must be unique. The *Description* is optional. Assign data objects to the category from the list of Available Objects.

Click on the **OK** button to store the new Category information.

Modifying Categories

To change category information, click the **Modify Category** action for the category. The *Category Details* dialog will be displayed:

Category Details [X]

Category Name:

Description:

Objects:

Available Objects	Assigned Objects
Categories	Customers
CategoriesW	Employees
Employee Territories	Orders
Invoices	
Order Details	
Products	
Region	
Shippers	
Suppliers	
Territories	

[OK] [Cancel]

Modify the appropriate information and click the **OK** button to store the information.

Data Objects

Data Objects are core to the Ad Hoc reporting architecture. A data object is simply a collection of related columns whose definition resides in the metadata database.

Most data objects are created by importing all or part of a schema from a reporting database using the Management Console. The database table and view definitions are ported into the Ad Hoc metadata database.

Data objects may also be created by defining virtual views and catalogs within the Ad Hoc interface. A virtual view is a SQL SELECT statement that identifies the columns, tables, relationships and data transformations necessary for reporting. A catalog is a pre-defined set of related data objects and columns. Virtual views and catalogs only exist in the metadata database.

The concept of Data Object definitions existing in the metadata database is what allows the System Administrator to customize the end user experience and reduce the database specific technical knowledge required to produce complex reports. User friendly names, pre-defined relationships, user-defined columns and data object level filters are all designed to benefit the end user.

The Data Objects page allows the system administrator to customize data objects in the application. An objects label, column-formatting options, column descriptions, access rights, fixed parameters, user-defined columns and relationships may be modified.

Select **Data Objects** from the *Database Object Configuration* drop-down list to display the *Data Objects* configuration page.

User Configuration ▼ Database Configuration ▼ Report Configuration ▼ Application

Data Objects (?)

Database: Reporting Metadata ▼

Data Object	Friendly Name	Type	Hidden	Actions
Columns	Columns	Table	No	>
Objects	Objects	Table	No	>
SourceDatabase	Source Database	Table	No	>
UserReport	User Report	Table	No	>
Users	Users	Table	No	>

Information on the page may be sorted by clicking on the *Data Object*, *Friendly Name* or *Type* column headings.

The > icon indicates that more than one action can be performed on the data object. Hover the mouse over the > icon to display the available actions and click on the appropriate one.

The available actions for a data object are:

Modify Data Object – to change data object friendly name, description and visibility to the end user, as well as the column display order, friendly name, description, default format, default alignment, and hidden status as well as view the dependencies for each column or the data object. User-defined columns may also be defined.

Set Relations – to define relationships between the selected data object and other data objects and view the relationship dependencies.

Set Data Object Access Rights – to modify the data object access rights for each defined role associated with the current reporting database.

Set Parameters – to specify and manage one or more "fixed parameters" for the data object. Fixed parameters are filters applied to the data object in every occurrence of the data object's use.

Data objects based on stored procedures may have input parameters. Input parameters are established when the procedure is imported into the metadata database and may only be removed by removing the data object. Input parameters may be editable, implying that the value may be supplied by the end user when a report that is based on the procedure is executed.


Set Links – to configure links from columns to a URL or report.

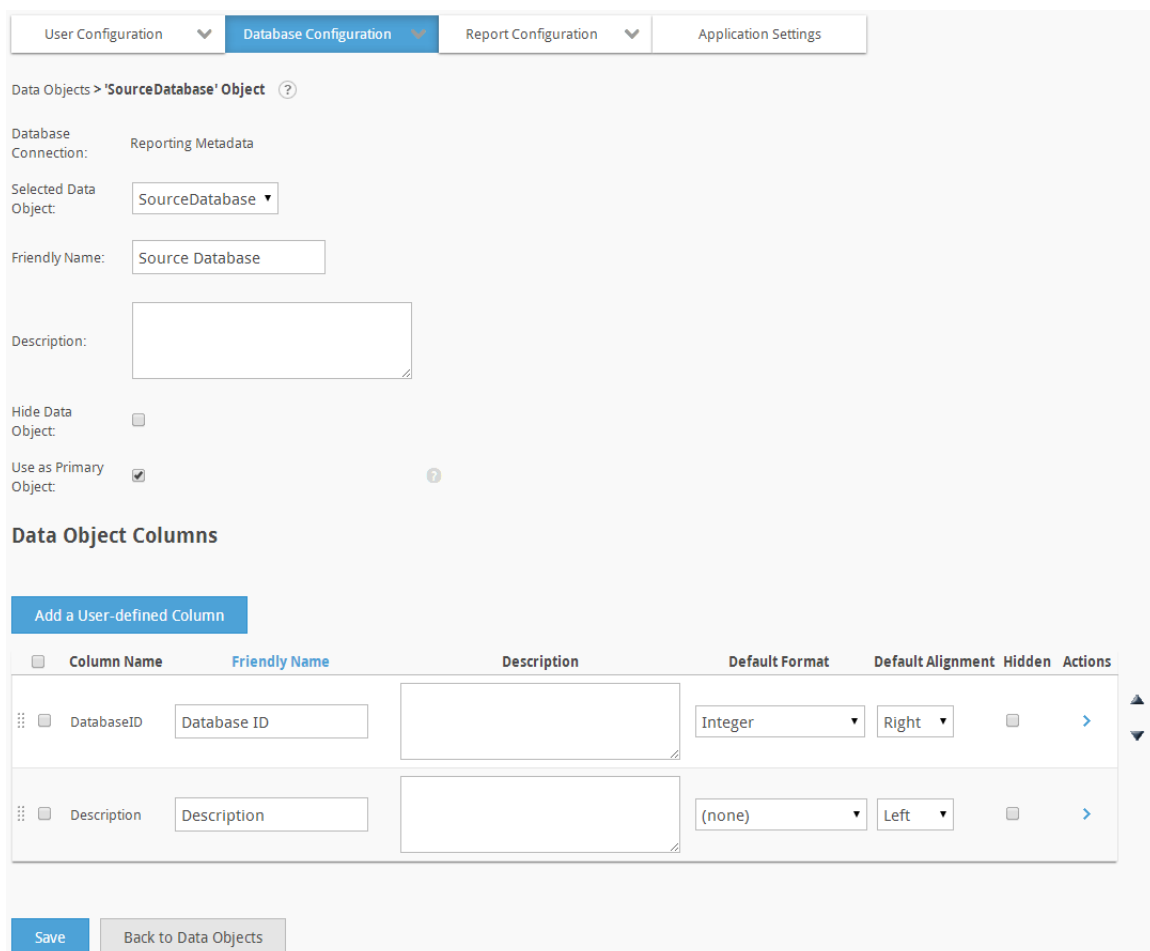
View Dependencies - The Dependencies page presents information about the content or usage of an item. The information is very helpful for System Administrators that need to know usage information.

Modifying Data Objects

The Modify Data Object page provides allows the System Administrator to:

- Change the friendly name, description, and visibility of the data object
- Change the friendly name, description, default format, default alignment and visibility of columns
- Change the presentation order of the columns in the Report Builder
- Manage user-defined columns
- View the dependencies related to a column

Hover the mouse over the  icon to display the available actions and click on the **Modify Data Object** option. The following page will be presented:



User Configuration Database Configuration Report Configuration Application Settings

Data Objects > 'SourceDatabase' Object ?

Database Connection: Reporting Metadata

Selected Data Object: SourceDatabase

Friendly Name: Source Database

Description:

Hide Data Object:

Use as Primary Object: ?

Data Object Columns

Add a User-defined Column

Column Name	Friendly Name	Description	Default Format	Default Alignment	Hidden	Actions
DatabaseID	Database ID		Integer	Right	<input type="checkbox"/>	>
Description	Description		(none)	Left	<input type="checkbox"/>	>

Save Back to Data Objects

The *Friendly Name* of the data object and the *Description* are presented in the Report Builder when the user is selecting the data for a report.

The *Hide Data Object* checkbox determines whether the data object is visible when the user is selecting data for a report. The system administrator may avail


themselves of other mechanisms to provide this data, such as Catalogs or Virtual Views and may not want users accessing the data object directly.

The *Friendly Name* and *Description* of a column is presented in the Report Builder when the user is selecting data for the report. The *Default Format* and the *Default Alignment* drop-down lists set the initial format and alignment, respectively, for a column in the Report Builder. The *Hidden* checkbox determines whether the column is visible through the Report Builder selection process.

The *Use as Primary Object* checkbox determines whether the data object is presented in the initial list of data objects on the **Modify Data Source** dialog in the Ad Hoc Report Builder. This allows the System Administrator to exercise more control over the initial list of data objects presented to the user. A typical use case would be to remove lookup tables from the initial list of objects.

Columns are presented to the end user in the Report Builder in the same order displayed in the *Modify Data Objects* page. The columns may be presented alphabetically by *Friendly Name* by clicking on the *Friendly Name* column header. They may also be rearranged by using the drag-and-drop capability.

Note:

Drag-and-drop capability exists throughout the Ad Hoc interface. Mousedown on the handle () at the left of each row in the grid, drag the row to the target location and release the mouse.

Click on the **Save** button to store the changes.

Notes:

1. Choose appropriate values for *Default Format* to avoid undesirable results when generating reports.
2. If HTML is selected as the *Default Format*, then an end-user will not be able to change the format of the column in the Report Builder to something else.
3. The 'Preserve line feed' format allows text in a memo type field to display as it is stored with line feeds (a.k.a., carriage returns) observed. This is the default format for data types of Long Text (e.g., LongVarChar).

Managing User-Defined Columns

The System Administrator can extend the list of columns for a data object by creating user-defined columns. The definition of a user-defined column must conform to the SQL SELECT syntax of the reporting DBMS for a column. Typical uses of user-defined columns include string formatting and concatenation, CASE statements and in-row calculations.

To create a user-defined column, click on the **Add a User-defined Column** button. The following dialog will be displayed:

Enter a unique *Column Name* and the *Definition* in the space provided.

Note:


A user-defined column's *Definition* must be a valid SQL statement. If design-time validation is ON, this statement will be validated against the database to assure it is syntactically correct.

If the calculated column is based on an existing column, use the *Columns* list to select the existing column and place it in the *Definition*.

Clicking on one of the *Operators* will place the operator into the *Definition* at the last cursor position.

Select the *Data Type* of the expected result of the *Definition*.

Click on the **OK** button to validate the *Definition* and store the result.


Once a user-defined column has been created, it may be changed or removed by hovering the mouse over the  icon for the user-defined column to display the available actions and click on either the **Modify Column** or **Remove Column** option.

Note:

The **Modify Column** or **Remove Column** actions are not an option for the original columns of the data object.

Click on the **Save** button of the *Modify Data Objects* page to commit the user-defined column definition to the metadata database.

View Dependencies

To view the dependencies for a column from the Modify Data Objects page, hover the mouse over the  icon to display the available actions and click on the **View Dependencies** option. The following page will be presented:

User Configuration ▾ Database Configuration ▾ Report Configuration ▾ A

Selected Column: Category ID ▾

▲ 'Category ID' depends on the following:

DATABASE

Small Northwind

OBJECT

Categories

▾ 'Category ID' depends loosely on the following:

▲ The following depend on 'Category ID':

- Fixed Parameters
- Relationships
- Cascading Filters

FIXED PARAMETERS

None

RELATIONSHIPS

None

CASCADING FILTERS

None

▾ The following depend loosely on 'Category ID':

[Back to Object Details](#)


The content of this page has been adjusted to fit on the page. The View Dependencies option for a column presents a report of where the column is used throughout the Ad Hoc instance. This report can help System Administrators determine the potential scope and impact of changes to a column definition.

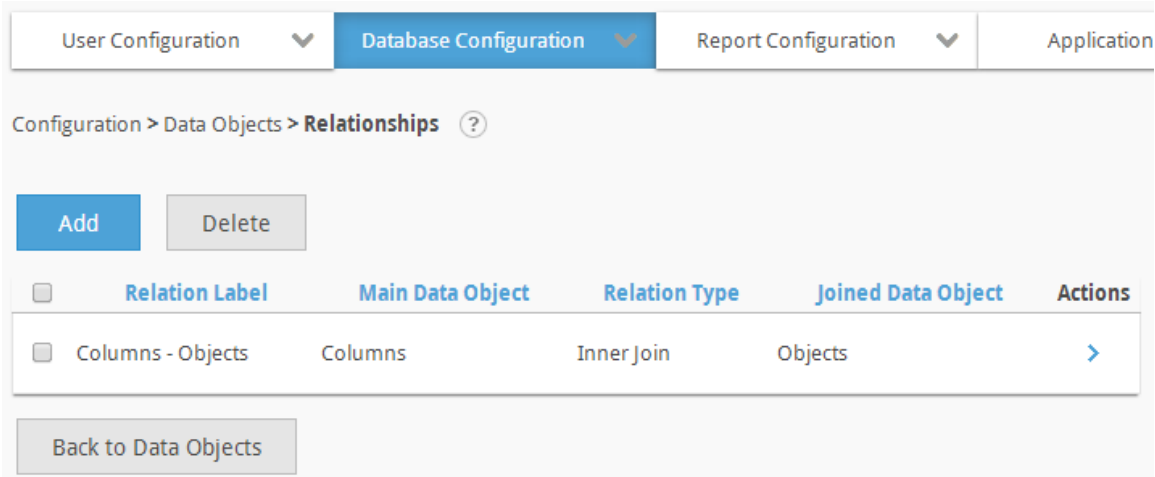
Adding a Data Object Relationship

The System Administrator may define relationships between data objects. When a relationship exists between two data objects, selection of one of the data objects will present the end user with the opportunity to select the related data object in the Report Builder.

Note:

Refer to the **Relationships** section of this guide for detailed information about creating and managing relationships.


To define relationships for a data object from the Data Objects page, hover the mouse over the  icon to display the available actions and click on the **Set Relations** option. The following page will be presented:



User Configuration Database Configuration Report Configuration Application

Configuration > Data Objects > Relationships ?

Add Delete

<input type="checkbox"/>	Relation Label	Main Data Object	Relation Type	Joined Data Object	Actions
<input type="checkbox"/>	Columns - Objects	Columns	Inner Join	Objects	

Back to Data Objects


A list of relationships from the current data object to other data objects in the database is displayed.

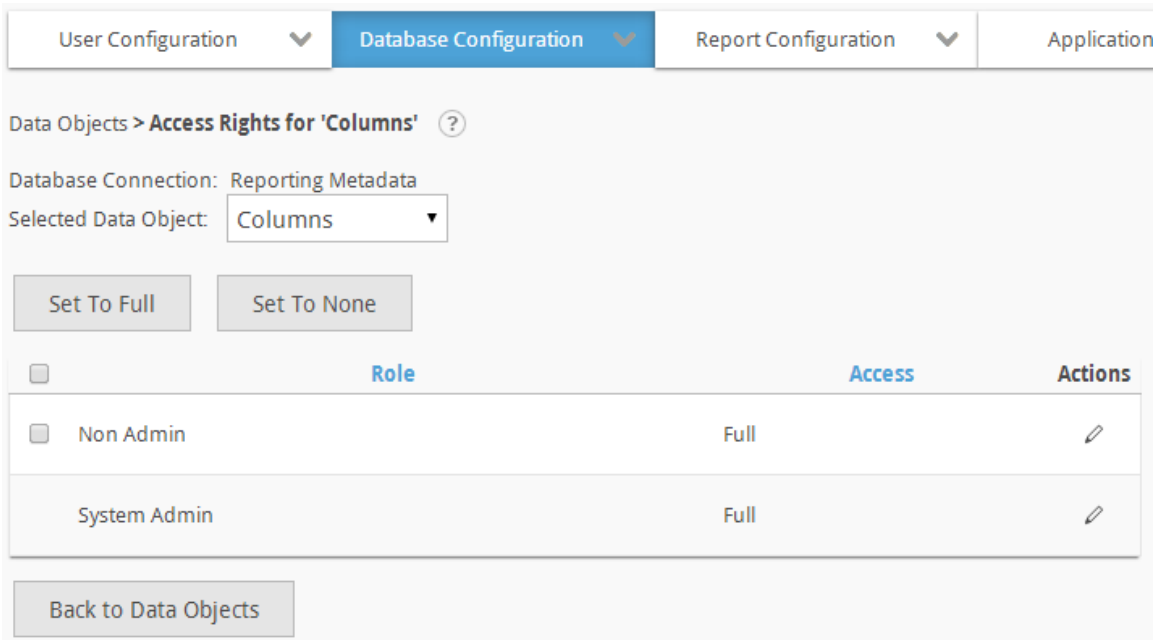
Click the **Add button** to create a relationship from the current object to another data object in the database.

Setting Data Object Access Rights

Data Object Access Rights may be set for the data object or specific columns in the data object for each Role associated with the current reporting database. Data Object Access Rights determine which data objects and columns are restricted from use by a Role. By default, all data objects and columns are accessible by all roles associated with the current reporting database.

Note:
For detailed help setting access rights, refer to the *Setting a Role's Data Object Access Rights* in the *Roles* section of this guide.

To set the access rights for a data object from the Data Objects page, hover the mouse over the  icon to display the available actions and click on the **Set Data Object Access Rights** option. The following page will be presented:





User Configuration Database Configuration Report Configuration Application

Data Objects > Access Rights for 'Columns' ?

Database Connection: Reporting Metadata


Selected Data Object: Columns

Set To Full Set To None

<input type="checkbox"/>	Role	Access	Actions
<input type="checkbox"/>	Non Admin	Full	
<input type="checkbox"/>	System Admin	Full	

Back to Data Objects

Access rights for the *Selected Data Object* may be set to full or none for a role by selecting the role with the checkboxes and clicking on the **Set to Full** or **Set to None** buttons, respectively.

Alternatively, click on the  icon to **Modify Column Access Rights** to display the **Column Access Rights** dialog and set the access at the column level.

Specifying Fixed Parameters

Permanent filters may be applied to a data object. These filters are called “fixed parameters” and are transparent to the end user. Additional parameters may be applied as the report is built and executed, but the end user cannot modify the fixed parameter on the data object.

To define and manage fixed parameters for a data object, hover the mouse over the > icon to display the available actions and click on the **Set Parameters** option. The following page will be presented:

User Configuration Database Configuration

Data Objects > Fixed Parameters for 'Customers' ?

Database Connection: Northwind

Selected Data Object: Customers

Fixed Parameters

Add

Move	Column Name	Operator	Value	Actions
	Customers.Country	Equal to	Germany	>
▲ ◀ ▶ ▼	Or Customers.Country	Equal to	France	>

Save Back to Data Objects

A fixed parameter takes the form of an equation similar to:

Label is Compared to Value

where *label* represents a column name, *compared to* represents a comparison operator, and *value* represents a threshold.

The available comparison operators are:

- Equal to
- Not equal to
- Less than
- Greater than
- Less than or equal to
- Greater than or equal to
- Starts with ¹
- Does not start with ¹
- Ends with ¹
- Does not end with ¹
- Contains ¹
- Does not contain ¹
- Is null
- Is not null
- Between
- Not between
- In list
- Not In List
- Like ¹
- Not Like ¹

Notes:

1. These operators are only available for data type of type String or Text.
2. The operators available are dependent upon the column's data type. For example, a numeric data type would not include operators such as **true/false**.

Managing Fixed Parameters

Click on the **Add** button to define a fixed parameter. The following dialog will be presented:

The screenshot shows a dialog box titled "Parameter Details" with a close button (X) in the top right corner. The dialog contains the following elements:


- A dropdown menu at the top showing "And".
- A label "Column:" followed by a text box containing "Customers.Customer ID" and a dropdown arrow.
- A label "Operator:" followed by a dropdown menu showing "Equal to".
- A label "Value:" followed by a dropdown menu showing "Specific Value" and an empty text input field with a search icon (magnifying glass) to its right.
- At the bottom, there are two buttons: "OK" (highlighted in blue) and "Cancel".

If fixed parameters have been previously defined, the option to specify an And/Or condition will be presented.

Select the *Column* from the drop-down list, an *Operator* from the drop-down list and either provide a *Value* manually or use the magnifying glass to select a *Value* from the reporting database.

Click on the **OK** button to store the fixed parameter information temporarily.

After adding all of the fixed parameters, click on the **Save** button on the Parameters page to store the information in the metadata database.


To edit or remove a fixed parameter, hover the mouse over the  icon to display the available actions and click on the **Edit Parameter** or **Remove Parameter** option, respectively.

Notes:


1. If the **In list** or **Not in list** operator is selected, then more than one value may be specified. If manually typing in each value, then follow each entry by the ENTER key.
2. If the value is a number, the **Value** field must contain a valid number to build the report.
3. The Parameter functionality does not support conditions against data types of type Time. Date/Time data types are supported but their time portion will be ignored.

Hint:

When adding multiple parameters, a logical operator (**And** or **Or**) becomes available for selection at the beginning of the next parameter. Use this operator to set the cumulative conditions for the parameters.

If the report contains two or more parameters, the  icon appears for each additional parameter. The directional pad gives users the ability to create *levels* for each parameter. Control the order of evaluation for multiple parameters using the directional pad.

Advanced data filtering makes it possible to define groups of parameters that work together to filter undesirable data. Multiple parameters can be defined to control the order of evaluation. Filter data to control what users see at runtime.

Fixed parameters on data objects give administrators the ability to control the content seen by end-users. Filter extraneous data by defining one or more parameters that are evaluated at runtime. The directional pad control () enables administrators the ability to control the order of evaluation.

The individual arrows of the control perform the following functions:

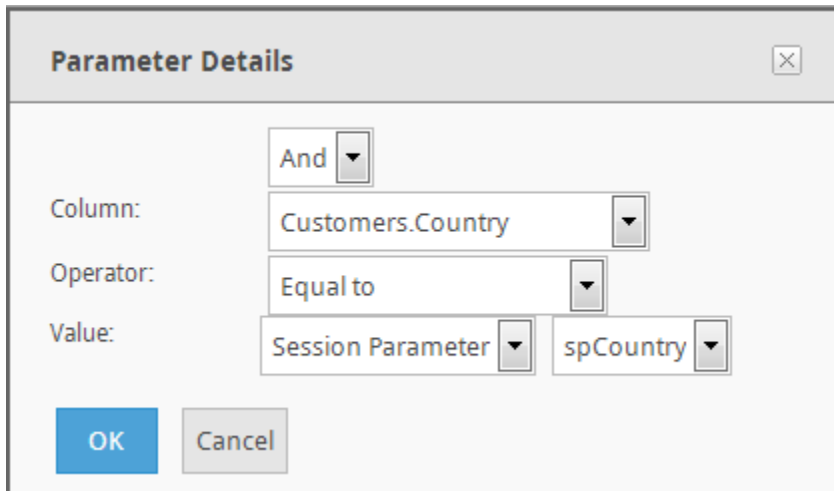
- ▲ Shifts a parameter one position higher in the list (retains indentation)
- ▼ Shifts a parameter one position lower in the list (retains indentation)
- ◀ Indents a parameter one position left
- ▶ Indents a parameter one position right

Note:

Parameters indented furthest to the right are evaluated first.

Using Session Parameters

If session parameters have been defined for the Ad Hoc instance, the fixed parameters detail dialog may be slightly different. See the following picture:



Notice that there is a *Value* source dropdown. This dropdown is shown when there may be session parameters used as part of the filter. The source is typically a “Specific Value”; however, if session parameters have been defined, “Session Parameter” may be selected as the *Value* source. When “Session Parameter” is selected, a dropdown list of relevant session parameters is displayed.

Session parameters are one of five types; date, number, numeric list, text or textual list. The dropdown list of session parameters will contain the session parameters that match the data type of the *Column*. The list is also restricted by the *Operator* selected.

For date *Columns*, the date session parameters will be shown in the list of available session parameters.

For numeric *Columns*, either the number or numeric list session parameters will be shown in the list of available session parameters. If the *Operator* is set to “In List” or “Not In List”, the numeric list session parameters will be shown, otherwise the number session parameters will be shown.

For text *Columns*, either the text or textual list session parameters will be shown in the list of available session parameters. If the *Operator* is set to “In List” or “Not In List”, the textual list session parameters will be shown, otherwise the text session parameters will be shown.

In older versions of Logi Ad Hoc, session parameters could also be used as the basis for a fixed parameter on a data object as shown in the following picture:

The screenshot shows a dialog box titled "Parameter Details" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Column:** A dropdown menu showing "Customers.Country".
- Operator:** A dropdown menu showing "Equal to".
- Value:** A dropdown menu showing "Specific Value" and a text input field containing "@Session.spCountry~". A magnifying glass icon is visible to the right of the input field.
- Buttons:** "OK" (blue) and "Cancel" (grey) buttons are located at the bottom left.

Notice that the *Value* source is "Specific Value" and that an @Session token has been supplied as the *Value*. While this technique is still supported in Logi Ad Hoc, @Session tokens require a specific syntax and the session parameter specified must match the session parameter name exactly, including case. There is no type checking of the value and the SQL syntax generated may not be appropriate in all cases.

The preferred method for using session parameters as the basis for a fixed parameter on a data object is to select "Session Parameter" as the *Value* source and selecting the appropriate session parameter from the available list.

Configuring Input Parameters

Data objects based on stored procedures and functions may have required input parameters. Input parameters are simply values that the procedure needs in order to execute properly.

Since the logic associated with the usage of the input parameters is contained within the procedure definition, no operators may be specified for a parameter. The Parameter Details dialog for an input parameter would appear as:



The *Friendly Name* that is displayed to the end user may be adjusted.

The *Editable* checkbox indicates that the parameter value will be obtained through an automatic report filter. When the data object that has editable input parameters is selected for use in a report, the **Modify Data Source** dialog **Filter** tab will have associated filters automatically created. See the *Filter* description in the *Report Design Guide*.


The *Value* may be set as a *Specific Value* or a *Session Parameter* may be used. To enter a specific value, select *Specific Value* from the dropdown list and enter the value in the space provided. To use a session parameter for the *Value*, select *Session Parameter* from the dropdown list and select one of the session parameters from the provided list.

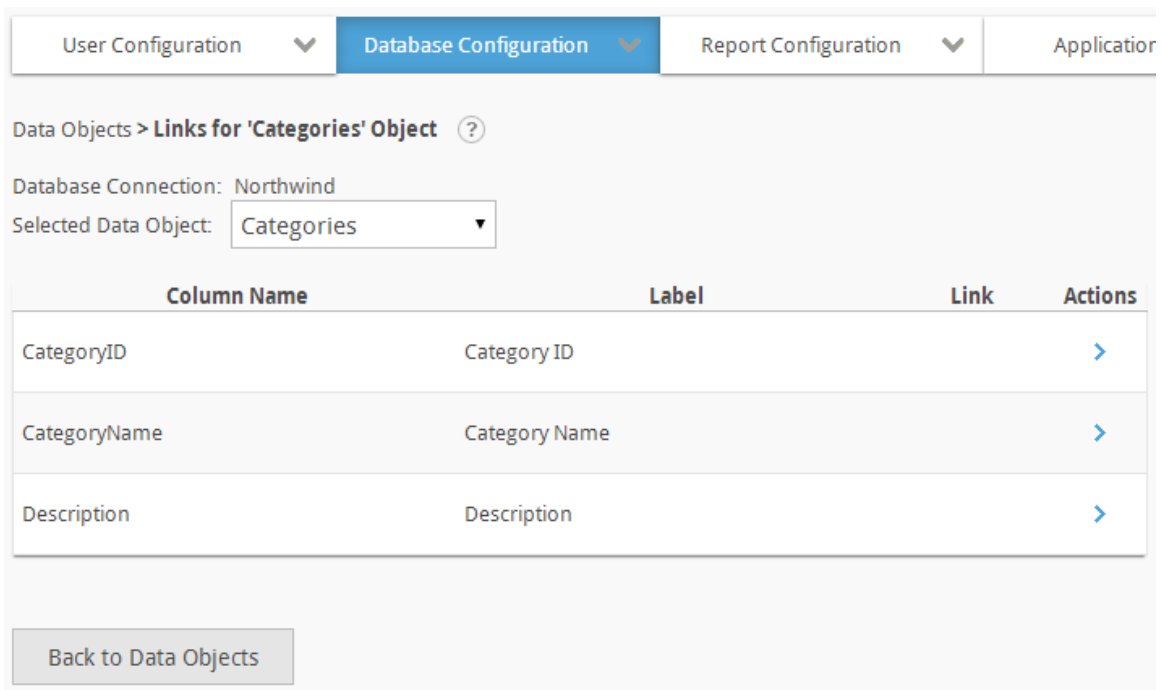
Note:

There are no indications of the proper format for an input parameter nor are there mechanisms to provide a list of viable options for the value.

Setting Links

System administrators can create automatic hyperlinks for each record in a specified column. End users can access these links to open other web pages or drill through to different reports. End users also have the option of enabling or disabling the links when building reports.

To define and manage links from a data object, hover the mouse over the  icon to display the available actions and click on the **Set Links** option. The following page will be presented:






User Configuration Database Configuration Report Configuration Application

Data Objects > Links for 'Categories' Object ?

Database Connection: Northwind

Selected Data Object: Categories


Column Name	Label	Link	Actions
CategoryID	Category ID		
CategoryName	Category Name		
Description	Description		

Back to Data Objects

The list contains the columns that are candidates for linking to either a linked report or a URL.

Note:

A column may only have one link defined.

From the list of columns for the data objects, hover the mouse over the  icon to display the available actions. The available actions will either be **Add Link** or **Edit Link** and **Remove Link**. The following dialog will be displayed:

Information for link to report: Customer Orders ✕

Link to Any URL
 Link to an Ad Hoc Report

Link URL:

Window ID: ▼

Link Parameters:

Parameter Name	Parameter Source	Actions
<input type="button" value="Add a Link Parameter"/>		


Administrators must first determine if the link points to an Ad Hoc report or an external URL.

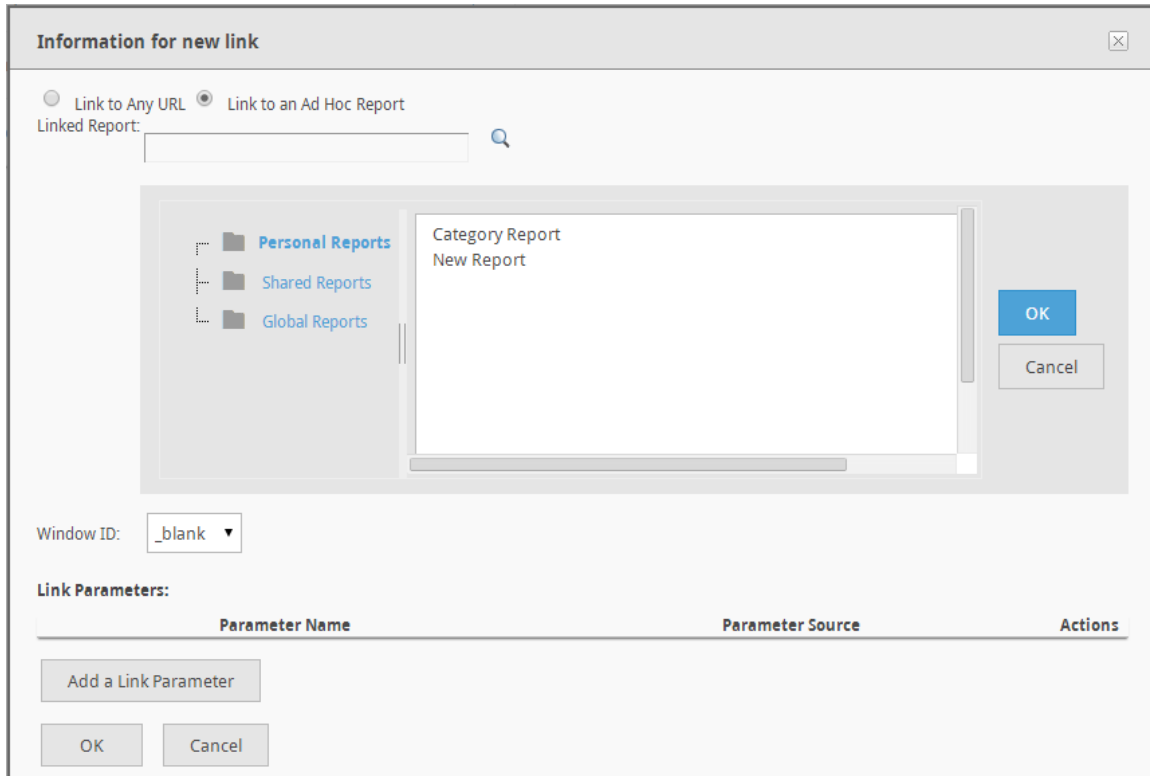
To create an object link to a URL, the *Link to Any URL* option must be selected.

Enter the *Link URL* information and click on the **Test URL** button to verify the address.

Click on the **Add a Link Parameter** button and type in the parameter name. Choose the column that will be the source of the data for the parameter from the drop-down menu.


Click on the **OK** button to save the information.

To create a link to an existing Ad Hoc report, select the *Link to an Ad Hoc Report* option and the dialog will be re-displayed as follows (image shows the effect of clicking on the  icon):



Information for new link

Link to Any URL Link to an Ad Hoc Report

Linked Report: 

Personal Reports
Shared Reports
Global Reports

Category Report
New Report


OK
Cancel


Window ID:

Link Parameters:

Parameter Name	Parameter Source	Actions
Add a Link Parameter		

OK Cancel

Click the  icon to locate and choose a report from the list. After selecting the report, click **OK**.


Click on the **Add a Link Parameter** button and click on the  icon to select the target parameter. Choose the column that will be the source of the data for the parameter from the drop-down menu.

Click on the **OK** button to save the information.

Note:

Linked reports must have at least one parameter to enable drill-through functionality between two reports where the content of the linked report is dependent upon data from the parent report. Links to a static report do not require link parameters. Refer to the **Linking Reports** section of this guide for more information about linked reports.

View Dependencies

To view the dependencies for a data object from the *Data Objects* page, hover the mouse over the  icon to display the available actions and click on the **View Dependencies** option. The following page will be presented (a split view is presented here:

User Configuration

Database Configuration

Report Configuration

A

Selected Data Object: Categories


'Categories' depends on the following:

DATABASE

Northwind

'Categories' depends loosely on the following:

The following depend on 'Categories':

 The following depend loosely on 'Categories':

REPORTS

Report Name	Owner	Folder
Categories	Ad Hoc End User	Personal Reports
Categories / Products	Ad Hoc End User	Personal Reports
Product Summary	Admin	Shared Reports\Marketing Reports

[Back to Data Objects](#)

The option to view dependencies of a data object may help System Administrators know the scope and impact of changes to a data object.

Catalogs

A catalog is a predefined collection of related data objects and columns. Catalogs are used to simplify data object selection for the end user.

Essentially the System Administrator builds a catalog the same way an end user would select the data objects and columns for a report. A primary data object is selected along with all of the related data objects. This identifies a pool of columns that may be used in the report.

When the System Administrator has identified all of the data objects and columns, the result may be saved as a catalog. A catalog is presented to the end user in the list of data objects they may use for reporting.

The Catalog definition has two additional features. The System Administrator can eliminate duplicate or ambiguous column references (e.g. columns linking two data objects) and control the column name and friendly name.

Select **Catalogs** from the *Database Object Configuration* drop-down list to display the *Catalogs* configuration page.


The screenshot shows the 'Catalogs' configuration page. At the top, there are four tabs: 'User Configuration', 'Database Configuration' (selected), 'Report Configuration', and 'Application'. Below the tabs, the 'Catalogs' section is visible. It includes a 'Database' dropdown menu currently set to 'Northwind'. There are two buttons: 'Add' (highlighted in blue) and 'Delete'. Below these is a table with the following structure:

<input type="checkbox"/>	Catalog	Friendly Name	Actions
<input type="checkbox"/>	Customer Orders	Customer Orders	>

The **Database** dropdown list acts as a filter for the Catalog list. Only Catalogs related to the selected database will be displayed. If only one reporting database has been configured for the Ad Hoc instance, the **Database** filter will not be shown.

The **Add** button will display an empty *Catalog* page.

The **Delete** button will remove the selected catalogs. Catalogs are selected by clicking on the applicable checkbox.

Two actions are available for a Catalog; **Modify Catalog**, and **Delete Catalog**. Hover the mousepointer over the  icon to show the available actions.

Note:


A catalog is a data object. Additional configuration options are available for existing catalogs through the *Database Object Configuration / Data Objects* pages. The exception is that relationships may not be created between a catalog and other data objects.

Adding a Catalog

Creating a catalog requires selecting a catalog name, identifying the related data objects, and selecting the columns displayed to the end user. Optionally, the column names and friendly names may be specified as well as the friendly name of the catalog.

To create a catalog, click on the **Add** button to display the following page:

The screenshot displays the 'New Catalog' configuration interface. At the top, there are two tabs: 'User Configuration' and 'Database Configuration', with the latter being active. Below the tabs, the breadcrumb 'Catalogs > New Catalog' is shown with a help icon. The 'Database Connection' is set to 'Northwind'. There are three input fields: 'Catalog Name', 'Friendly Name', and 'Data Objects in:' (a dropdown menu currently showing '(All)'). Below these fields is a list of data objects with checkboxes: Categories, Customers, Employee Territories, Employees, Order Details, Orders, Products, Region, Shippers, Suppliers, and Territories. At the bottom of the form are two buttons: 'Save' and 'Back to Catalogs'.

Click on the  icon to display brief help for the *Catalog* page.

The *Database Connection* identifies the currently selected reporting database. The list of data objects is restricted to this reporting database schema.

Enter the *Catalog Name* and *Friendly Name* for the catalog.

If Categories of data objects have been defined, a dropdown list of the categories will be shown in the *Data Objects In*. Selecting a category will act as filter on the initial list of data objects presented.

Identify the main data object for the catalog by clicking on the checkbox adjacent to the data object. The data object tree may be expanded to show columns for each data object by clicking on the “+”.

Once a data object has been selected, the list of *Available Objects* will be populated and visible. Continue selecting the related data objects until the basic catalog intent has been satisfied. The *Catalog* page will appear as:

The screenshot shows the 'Database Configuration' page. At the top, there are two tabs: 'User Configuration' and 'Database Configuration'. The 'Database Configuration' tab is selected. Below the tabs, the 'Database Connection' is set to 'Northwind'. There are three input fields: 'Catalog Name', 'Friendly Name', and 'Data Objects in' (which is a dropdown menu currently showing '(All)'). Below these fields is a tree view of data objects. The tree is expanded to show a list of objects, each with a checkbox and a '+' icon. The objects listed are: Categories, CategoriesVW, Customers, Employee Territories, Employees, Invoices, Order Details, Orders, Products, Region, Shippers, Suppliers, and Territories. At the bottom of the page, there are two buttons: 'Save' and 'Back to Catalogs'.

From the *Available Column* list, select the columns to be included in the catalog by clicking on the checkboxes for the columns and clicking on the **right-arrow**. All columns may be selected by clicking on the checkbox in the header of the *Available Columns* list.

Once columns have been selected and included in the *Catalog Columns* grid, the page will appear as:

Catalogs > 'Customer Orders' Catalog

Database Connection: Northwind
 Selected Catalog: Customer Orders
 Friendly Name: Customer Orders
 Data Objects in: (All)

Column	Column Name	Friendly Name
<input type="checkbox"/> Customers.CompanyName	CompanyName	Company Name
<input type="checkbox"/> Orders.OrderDate	OrderDate	Order Date
<input type="checkbox"/> Order Details.UnitPrice	UnitPrice	Unit Price
<input type="checkbox"/> Order Details.Quantity	Quantity	Quantity
<input type="checkbox"/> Products.ProductName	ProductName	Product Name

Buttons: Save, Save As..., Back to Catalogs

The System Administrator has the opportunity to manually adjust the *Column Name* and *Friendly Name* for each column in the *Catalog Columns* grid. Columns may be removed from the catalog by selecting the column with the adjacent checkbox and clicking on the **left-arrow**.

Column Names must be unique.

Click on the **Save** button to store the catalog information.

Adding a Catalog Using "Save As"

The administrator can create a catalog by modifying an existing catalog and then saving it as a new catalog by clicking on the **Save As** button and specifying the new *Catalog Name* and *Friendly Name*.

Virtual Views

The Virtual Views page allows the system administrator to create customized views from objects in the source database. End users can include virtual views as a data source when building reports. Virtual views are saved to the application metadata database; the source database is unmodified.

Select **Virtual Views** from the *Database Object Configuration* drop-down list to display the *Virtual Views* configuration page.

Virtual Views ?

Database: Northwind

Add Delete

<input type="checkbox"/>	Virtual View	Friendly Name	Actions
<input type="checkbox"/>	CategoriesW	CategoriesW	>

The **Database** dropdown list acts as a filter for the Virtual View list. Only Virtual Views related to the selected database will be displayed. If only one reporting database has been configured for the Ad Hoc instance, the **Database** filter will not be shown.

The **Add** button will display an empty *Virtual View* page.

The **Delete** button will remove the selected virtual views. Virtual views are selected by clicking on the applicable checkbox.

Note:

Removing a virtual view marks any reports that depended on that virtual view as broken. Delete virtual views with caution.

Two actions are available for a Virtual View; **Modify Virtual View**, and **Delete Virtual View**. Hover the mousepointer over the > icon to show the available actions.

Adding a Virtual View

A virtual view is essentially a pre-defined SQL Select statement. Typically virtual views are used to relate multiple tables, perform data conversions, and reduce the number of data objects that the end user sees.

To create a virtual view, click on the **Add** button. The following page will be displayed:

The screenshot shows the 'New Virtual View' configuration page. At the top, there is a navigation bar with three tabs: 'User Configuration', 'Database Configuration' (which is highlighted in blue), and 'Report Configuration'. Below the navigation bar, the page title is 'Virtual Views > New Virtual View' with a help icon. The form contains the following elements:

- Database Connection:** A dropdown menu showing 'Northwind'.
- Virtual View Name:** A text input field.
- Friendly Name:** A text input field.
- Definition:** A large text area for entering the SQL Select statement.
- Test Definition:** A button to test the SQL definition.
- Save:** A blue button to save the virtual view.
- Back to Virtual Views:** A button to return to the virtual views list.

The *Database Connection* identifies the currently selected reporting database.

Enter a unique *Virtual View Name*, *Friendly Name*, and *Definition*. The *Definition* is a SQL Select statement that conforms to the syntax rules for a SQL sub-query.

Note:

Virtual views are implemented in the report definitions as “SELECT * FROM (*Definition*)”.

Click on the **Test Definition** button to verify the *Definition* syntactically using the reporting database. If the *Definition* is tested successfully, the page will display the schema information returned by the query. For example:

User Configuration ▾
Database Configuration ▾
Report Configuration ▾
App

Virtual Views > **New Virtual View** ?

Database Connection: Northwind

Virtual View Name:

Friendly Name:

Definition:

```
SELECT ProductName, UnitPrice, UnitsInStock FROM Products
```

Virtual View Columns

Column Name	Data Type	Character Length	Numeric Precision	Numeric Scale
ProductName	VarChar	40	255	255
UnitPrice	Currency	8	19	255
UnitsInStock	SmallInt	2	5	255

Click on the **Save** button to store the virtual view definition in the metadata database.


Creating Virtual Views Using 'Save As'

The administrator can create a virtual view by modifying an existing virtual view and then clicking on the **Save As** button, entering a new *Virtual View Name* and *Friendly Name*, and clicking on the **OK** button.

Hint:

Always remember to test the virtual view definition to ensure that the correct data columns are returned. Modifying the sub-query later may break reports that depend on the virtual view for data.



Modifying Virtual Views

A virtual view may be modified by clicking on the  icon in the list of virtual views. The *Friendly Name* and the *Definition* may be modified.

Click on the **Test Definition** button to verify the new information. The *Virtual View Columns* grid will be updated and identify the differences between the original *Definition* and the new *Definition*. For example:

Virtual View Columns

Column Name	Data Type	Character Length	Numeric Precision	Numeric Scale
ProductName	VarChar	40	255	255
UnitPrice	Currency	8	19	255
UnitsInStock	SmallInt	2	5	255
UnitsOnOrder	SmallInt	2	5	255

Legend:  Unchanged  To be removed

Click on the **Save** button to store the modified information in the metadata database.

Notes:

1. Modifying a virtual view's sub-query may break reports that depend on the virtual view for data. Modify virtual views with caution.
2. Use only SQL sub-query statements when creating virtual views; statements such as **ORDER BY** are not supported. For security purposes, the following SQL statements are always prohibited: **EXECUTE**, **INSERT**, **UPDATE** and **DELETE**.

Relationships

The Relationships page allows the system administrator to create join relationships for data objects in the Ad Hoc instance. Join relations must be defined within the instance because relationships that exist in the source database are not synchronized by the Schema Wizard. Join relationships created in the Relationships page are stored in the Ad Hoc metadata database; the reporting database is not modified.

Relationships impact the end user when they are selecting data objects in the Report Builder to be included in the report. When they select the first data object, the list of data objects is adjusted to show the selected data object and any related data objects. Every time a data object is selected, the list of related data objects is refreshed.

Hint:

Administrators running Microsoft SQL Server, Oracle, Informix or Sybase as a reporting database can utilize the **Import Relationships** action in the Management Console to synchronize the instance with join relations from the reporting database. Refer to the *Management Console Usage Guide* for more details.

Select **Relationships** from the *Database Object Configuration* drop-down list to display the *Relationships* configuration page.

Configuration > Relationships ?

Database: Northwind

Add Delete

<input type="checkbox"/>	Relation Label	Main Data Object	Relation Type	Joined Data Object	Actions
<input type="checkbox"/>	Categories - Products	Categories	Inner Join	Products	>
<input type="checkbox"/>	Customers - Orders	Customers	Inner Join	Orders	>
<input type="checkbox"/>	Employees - Employee Territories	Employees	Inner Join	EmployeeTerritories	>
<input type="checkbox"/>	Emolovees - Emolovees	Emolovees	Inner Ioin	Emolovees	>

A list of relationships is displayed allowing the system administrator to view information associated with each relationship, such as the type of relation and which objects are joined together.

Note:

Main Data Object refers to the **left** data object and *Joined Data Object* refers to the **right** data object.

The **Database** dropdown list acts as a filter for the Relationship list. Only Relationships related to the selected database will be displayed. If only one reporting database has been configured for the Ad Hoc instance, the **Database** filter will not be shown.



The **Add** button will display an empty *Relationship* page.

The **Delete** button will remove the selected relationships. Relationships are selected by clicking on the applicable checkbox.

Note:

Removing relationships marks any reports that depend on that relationship as broken. Delete relationships with caution. Use the **View Dependencies** option to determine the scope and usage of a relationship.

The rows in the relationship grid may be sorted by clicking on the *Relation Label*, *Main Data Object*, *Relation Type*, or *Joined Data Object* column header.

The  icon indicates that more than one action can be performed on the data object. Hover the mouse over the  icon to display the available actions and click on the appropriate one.

The available actions for a relationship are **Modify Relationship**, **Delete Relationship** and **View Dependencies**.

The following join types are available in the application:

- **Inner Join** - Retrieve records when a match exists in both tables
- **Left Outer Join** - Always retrieve records in the *left* table
- **Right Outer Join** - Always retrieve records in the *right* table

Hint:

Normally, only one relationship needs to be defined between two data objects. Although three relationship types are allowed, avoid creating more than one. In the event that more than one relationship type is created between the same two data object, attempt to make the relationship's label descriptive.

Adding a new Relationship

To create a new relationship between two data objects, click on the **Add** button. A blank *Relationship* page will be displayed.

The screenshot shows the 'New Relationship' configuration page. At the top, there are two tabs: 'User Configuration' and 'Database Configuration'. Below the tabs, the breadcrumb navigation reads 'Configuration > Relationships > New Relationship'. The main configuration area includes the following fields:

- Database Connection:** Northwind
- Relation Label:** (empty text input)
- Main Data Object:** Categories (dropdown menu)
- Join Type:** Inner Join (dropdown menu)
- Joined Data Object:** Categories (dropdown menu)
- Auto Reverse:**
- Joined Data Object Modified Label:** (empty text input with a help icon)
- Main Data Object Modified Label:** (empty text input with a help icon)

Below these fields is an 'Add' button. Underneath the 'Add' button, there is a checkbox labeled 'Main Data Object Column' and 'Joined Data Object Column'. Below this checkbox, there are two dropdown menus, both showing 'Category ID'.

At the bottom of the page, there are two buttons: 'Save' and 'Back to Relationships'.

The *Database Connection* identifies the currently selected reporting database.

The specified *Relation Label* should clearly identify the data objects and relationship type; however that is a recommendation and not a requirement.

The *Main Data Object* and the *Joined Data Object* identify the two data objects that are related. Select a data object from each of the respective lists.

Select the *Join Type* from the provided list.

The *Auto Reverse* checkbox indicates whether the relationship is 'literal' or 'logical'. Ad Hoc has the ability to logically relate the two data objects. If a relationship is defined, the logical reverse of the relationship can be assumed by enabling the checkbox.

If the *Auto Reverse* checkbox is unchecked, the relationship is 'literal'. When the user selects the *Main Data Object* for their report the related *Joined Data Object* will be shown; however, if the *Joined Data Object* is selected for their report, the related *Main Data Object* is not shown. The relationship only exists in one direction.

The *Joined Data Object Modified Label* and the *Main Data Object Modified Label* are displayed in the Report Builder to help identify the data objects to the end user. Enter a "nickname" for the data objects to be presented when the data object available for selection in the Report Builder.

Relationships are also between columns in the data objects. Normally relationships are based on a single pair of columns in the two data objects; however, compound relationships based on multiple column pairs can be created.


Select the columns to be related from the drop-down lists for the *Main* and *Joined Data* objects. For compound relationships, click on the **Add** button and select the second pair of related columns. To remove column pairs, select the pair of columns with the checkbox and click the **Delete** button that becomes visible with more than one pair of related columns.

Click on the **Save** button to store the relationship in the metadata database.

Notes:

If the *Main Data Object* drop-down menu is inactive, relationships can only be created from that specific object to another object.

Modifying Relationships

To modify a relationship, hover the mouse over the  icon to display the available actions and click on the **Modify Relationship** action.

The *Relationship* page will be displayed.


Modifications to either the data objects or related columns will break the reports that rely on them. It is strongly suggested that the **View Dependencies** report is run to identify the scope and impact of potential relationship changes.

Modifications to the *Auto Reverse* flag may break reports.

Modifications to any of the labels will not impact the reports.

Make the necessary adjustments to the relationship and click on the **Save** button to store the relationship in the metadata database.

View Dependencies

To view the dependencies for a relationship from the *Relationships* page, hover the mouse over the  icon to display the available actions and click on the **View Dependencies** option.

The option to view dependencies of a relationship may help System Administrators know the scope and impact of changes to a relationship.

Chapter 3 Report Configuration

Ad Hoc gives system administrators the ability to manage the following report configuration options:

- Cascading Filters
- Presentation Styles
- Data Formats
- Scheduled Reports
- Archives
- Report Settings

Cascading filters are a series of user input drop-down menus where the value selected in the first drop-down affects the values displayed in the second drop-down and so forth. Users may include pre-defined cascade filters as report parameters.

Presentation styles give users a range of options to format data points based on a specific criteria.

Data formats give users a range of options to display data types in a specific format (e.g., 1000 as \$1,000.00).

Administrators can also configure general settings for reports as well as, limit the maximum number of records displayed in a report.

Administrators can manage report schedules and archives for each database connected to the Ad Hoc instance. If the selected database is not configured for archiving and scheduling, the *Archives* and *Scheduled Reports* links are not visible in the *Report Configuration* list. Refer to the **Management Console Usage Guide** for help configuring databases for archiving and scheduling.

Cascading Filters

The Cascading Filters page allows the system administrator to create and configure cascading filters for use when building reports with the Report Builder. The term *cascading filter* refers to a series of user input drop-down menus where the value selected in the first drop-down affects the values displayed in the second drop-down and so forth. Cascading filters have no default values but instead rely on user input at runtime.

Select **Cascading Filters** from the *Report Configuration* drop-down list to display the *Cascading Filters* configuration page.

<input type="checkbox"/>	Cascading Filter	Actions
<input checked="" type="checkbox"/>	City	>

The **Database** dropdown list acts as a filter for the Cascade Filter list. Only Cascade Filters related to the selected database will be displayed. If only one reporting database has been configured for the Ad Hoc instance, the **Database** filter will not be shown.

The **Add** button will display an empty *Cascade Filter* page.

The **Delete** button will remove the selected cascading filters. Cascading filters are selected by clicking on the applicable checkbox.

Two actions are available for a Cascade Filter; **Modify Filter**, and **Delete Filter**. Hover the mousepointer over the > icon to show the available actions.

Each cascading filter is comprised of one or more filter items. One *filter item* translates to one drop-down menu. Administrators must configure the following attributes for each filter item:

- *Data Object* - the data object used to populate the drop-down menu
- *Filter Column* - the column that is filtered by the value selected from the previous filter item
- *Value Column* - the column that provides the value for the next filter item
- *Display Column* - the column that provides the values for the drop-down menu

Note:

The first filter item always contains a blank value for the Filter Column.

Cascading filters are used as parameters in reports. From the Report Builder, end users must select a column to filter and then choose **In cascading list** as the operator. A list of all the cascading filters present is displayed and the end user must choose one.

Note:

The “*In cascading list*” and “*Not in cascading list*” options are only presented to the end user creating a report when the column selected to be filtered matches the last *Value Column* in the cascading filter definition.

Adding a new Cascading Filter

Click on the **Add** button to define a new cascading filter. A blank *Cascading Filter* page will be displayed.

User Configuration Database Configuration Report Configuration

Cascading Filters > New Cascading Filter

Database Connection: Northwind

Name:

Description:

Add

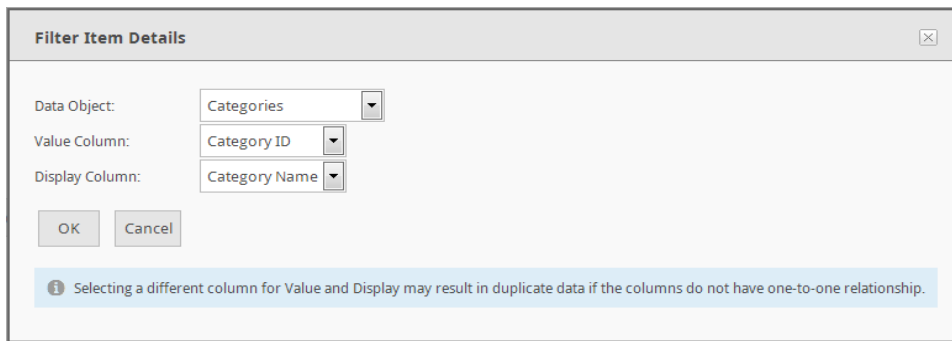
Test Filter

Save Back to Cascading Filters

The *Database Connection* identifies the currently selected reporting database.

Enter a *Name* and *Description* (optional) for the cascading filter.

Click on the **Add** button to create a filter item. If this is the first filter item, the following dialog will be presented:



Filter Item Details [X]

Data Object: Categories

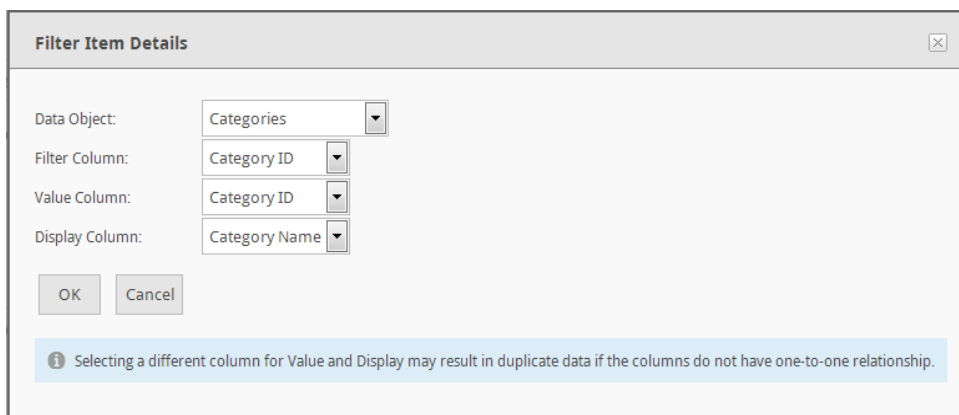
Value Column: Category ID

Display Column: Category Name

OK Cancel

i Selecting a different column for Value and Display may result in duplicate data if the columns do not have one-to-one relationship.

If this is an additional filter item, the following dialog will be presented:



Filter Item Details [X]

Data Object: Categories

Filter Column: Category ID

Value Column: Category ID


Display Column: Category Name

OK Cancel

i Selecting a different column for Value and Display may result in duplicate data if the columns do not have one-to-one relationship.

The difference between the two dialogs is the *Filter Column*. Since there are no filters applied to the first list of a cascading filter, this option is not presented for the first cascading filter list.

Repeat the process of adding filter items until the cascading filter definition is complete.

Filter items may be removed by selecting the filter item with the checkboxes and clicking on the **Delete** button. The definition of the filter item may be modified by clicking on the  icon.

Click on the **Test Filter** button to exercise the filter items and verify that the lists are properly populated. A preview page will be displayed similar to the following:

Note:

The cascading filter test will only exercise the filter. It does not accurately reflect the presentation of the cascading filter in a report.

Click on the **Save** button to store the cascading filter definition in the metadata database.

As an example, the following cascading filter definition was the basis for the **Test Filter** description above:

<input type="checkbox"/>	Data Object	Filter Column	Value Column	Display Column	Actions
<input type="checkbox"/>	Customers		Country	Country	
<input type="checkbox"/>	Customers	Country	Region	Region	
<input type="checkbox"/>	Customers	Region	City	City	

The first filter list is based on the “Country” column of the “Customers” data object. When the cascading filter is presented, the first drop-down list will be populated with a list of the distinct countries found in the “Customers” data object. The list is unfiltered. The caption for the list will be “Country”, the friendly name of that column. When the user selects one of the countries, the data in the “Country” *Value Column* will be passed to the next filter item.

The second filter list is based on the “Region” column of the “Customers” data object. When this list is presented, the contents will be all of the distinct regions in the “Customers” table, filtered by the “Country” value selected from the previous list. The caption for the list will be “Region”, the friendly name for that column. When the user selects a “Region”, the data in the “Region” *Value Column* will be passed to the next filter item.

The last filter item is based on the “City” of the “Customers” data object. When this list is presented, the contents will be a list of “Cities” filtered by the “Region” value selected from the previous list. When the user selects a “City”, the corresponding “City” value will be used to filter the data in the report.

The “In Cascade List” option will be presented to the user building the report when the column that the parameter is based on is the “City” column.

Notes:

- 1) The *Value Column* and *Display Column* may be different
- 2) The cascading filter may be based on multiple, related data objects
- 3) Only the last filter item is used to filter the report. If the last filter *Value Column* was “City” and the user selected “Springfield”, all records with a “City” of “Springfield” will be selected. The previous filter items are not considered.

Presentation Styles

The Presentation Styles page allows administrators to manage Cascading Style Sheet (CSS) classes available for use when building reports. Presentation styles registered on this page are used for highlighting specific report labels and captions and data points based on a given criteria.

Before registering a CSS class with the Ad Hoc instance, administrators must create the class and add it to every style sheet in the `_StyleSheets` folder. Adding the class to every style sheet ensures that all classes are available regardless of the report template selected from the Report Builder.



Note: While creating and managing *Presentation Styles*, the default stylesheet will be used to present the class options. The default stylesheet is set in the *Configuration / Report Configuration / Report Settings* page *Default Template* attribute.

Select **Presentation Styles** from the *Report Configuration* drop-down list to display the *Presentation Styles* configuration page.

<input type="checkbox"/>	Class Name	Friendly Name	Actions
<input type="checkbox"/>	bold	Bold	>
<input type="checkbox"/>	green	Green	>
<input type="checkbox"/>	red	Red	>
<input type="checkbox"/>	AlignLeft	Align Text Left	>
<input type="checkbox"/>	AlignCenter	Align Text Center	>

The **Add** button will display an empty *Presentation Style dialog*.


The **Delete** button will remove the selected presentation styles. Presentation Styles are selected by clicking on the applicable checkbox.

The  icon indicates that more than one action can be performed on the presentation style. Hover the mouse over the  icon to display the available actions and click on the appropriate one.

The available actions for a presentation style are **Modify Presentation Style** and **View Dependencies**.

Adding a Presentation Style


To make a presentation style available to the end user, click on the **Add** button. The following dialog will be presented (magnifying glass used to present the class list in the image).


Select the class by clicking on the  icon. Enter a Friendly Name and click on the **OK** button to store the presentation style reference in the metadata database.

Note:
Friendly names must be unique.


Modifying a Presentation Style

Modifying a style is necessary when the name of the class changes within the style sheet, or when administrators want to change what users see from the Report Builder. Modifying a style only changes its registration status in the Ad Hoc instance - the name of the class within the style sheet is not altered.

Hover the mouse over the  icon for a presentation style and select the **Modify Presentation Style** option from the list. Select the *Class* by clicking on the

 icon. Enter a *Friendly Name* and click on the **OK** button to store the revised presentation style reference in the metadata database.

View Dependencies

Hover the mouse over the  icon for a presentation style and select the **View Dependencies** option from the list.

A report page identifying the scope and usage of the presentation style will be presented. Administrators should exercise this option before modifying or deleting a presentation style to determine the impact of the change.

Data Formats

The *Data Formats* page allows the administrator to manage data formats for use when specifying default column formats or when building reports. By default, the Ad Hoc is installed with 22 pre-defined data formats and are listed in the *Data Formats* page in a green font.

Data formats are available to end-users when specifying a column format in the Report Builder. The list of format options will be limited to those that apply to the data type of the column. The presentation order of the data format in the drop-down list matches the order on the Data Formats page.

Select **Data Formats** from the *Report Configuration* drop-down list to display the *Data Formats* configuration page.

User Configuration ▾
Database Configuration ▾
Report Configuration ▾
Application Settings

Data Formats ?

Add
Delete

✕

Find Data Formats 🔍

<input type="checkbox"/>	Format Name	Format	Applies To	Explanation	Actions
☰ <input type="checkbox"/>	General Number	General Number	Numeric, Text		>
☰ <input type="checkbox"/>	Currency	Currency	Numeric, Text		>
☰ <input type="checkbox"/>	Integer	#0	Numeric, Text		>
☰ <input type="checkbox"/>	Fixed	Fixed	Numeric, Text		>
☰ <input type="checkbox"/>	Standard	Standard	Numeric, Text		>
☰ <input type="checkbox"/>	Percent	Percent	Numeric, Text		>
☰ <input type="checkbox"/>	Scientific	Scientific	Numeric, Text		>
☰ <input type="checkbox"/>	2-digit place holder	2-digit place holder	Numeric, Text		>



The **Add** button will display an empty *Data Format dialog*.



The **Delete** button will remove the selected user-defined data formats. Data Formats are selected by clicking on the applicable checkbox.

Note:

Data Formats distributed with Ad Hoc (green) cannot be deleted.

A search control may be presented for the *Data Formats* page. Enter the search criteria in the textbox and click on the **Find Data Formats** button. The search will find data formats based on a “contains” test. To clear the search criteria click on the **X** in the text box. The availability of the search feature is configurable.

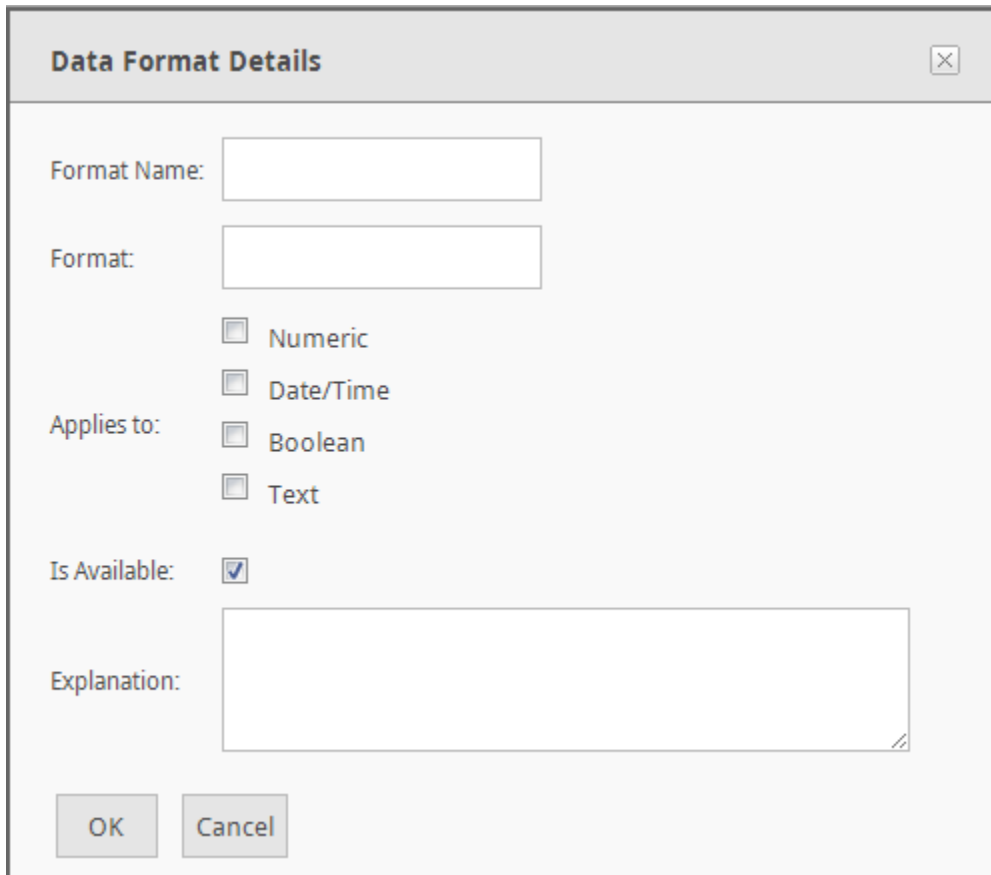
The presentation order of data formats in various lists follows the order of the data formats in the grid. The grid order may be adjusted by either using the drag-and-drop methods available or selecting a data format with the checkbox and clicking on the  or  arrows.

The  icon indicates that more than one action can be performed on the data format. Hover the mouse over the  icon to display the available actions and click on the appropriate one.

The available actions for a data format are **Modify Data Format** and **View Dependencies**.

Adding a Data Format

To create a user-defined data format, click on the **Add** button. The following dialog will be displayed:



The dialog box, titled "Data Format Details", contains the following fields and controls:

- Format Name:** A text input field.
- Format:** A text input field.
- Applies to:** A group of four checkboxes:
 - Numeric
 - Date/Time
 - Boolean
 - Text
- Is Available:** A checkbox that is checked ()
- Explanation:** A large text area for providing details.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

The *Format Name* will be displayed in the format lists available to the end user.

The *Format* is the Visual Basic formatting pattern. Refer to the [Visual Basic Formatting Pattern](#) for additional details on the specification of the pattern.


Select one or more *Applies to* options. This identifies the generic data types of the columns that the new data format might be applied to.

The *Is Available* checkbox allows the administrator to determine the visibility of the data format.

The *Explanation* is optional.


Click on the **OK** button to store the data format in the metadata database. The data format will be available at the next login. Existing sessions will be unaffected.

Modifying a Data Format

Hover the mouse over the  icon for a data format and select the **Modify Data Format** option from the list. In the dialog presented, make the necessary changes and click on the **OK** button to store the revised data format in the metadata database.

Reports using the old data format will have to be resaved to acquire the revised format.

View Dependencies

Hover the mouse over the  icon for a presentation style and select the **View Dependencies** option from the list.

A report page identifying the scope and usage of the data format will be presented. Administrators should exercise this option before modifying or deleting a data format to determine the impact of the change.

Scheduled Reports

The *Scheduled Reports* page allows administrators to view, modify and delete any schedule(s) created for an individual report. Additionally, the administrator can create additional schedules against any already scheduled report, subscribe users to receive the scheduled reports via email and/or archive scheduled reports.

The scheduling process is flexible and easy, offering the ability to deliver reports via email in HTML format, attached in a document (e.g., PDF, Word, Excel, CSV) or offering a link to the report in the archive directory on the server.

The scheduling process is described in detail in the *Report Builder Guide*. The primary purpose of the *Configuration / Report Configuration / Scheduled Reports* page is to centrally manage existing schedules. Creating a new schedule is typically implemented using the Report Builder.

Select **Scheduled Reports** from the *Report Configuration* drop-down list to display the *Scheduled Reports* configuration page.

Configuration > **Scheduled Reports** ?

Delete Schedules

<input type="checkbox"/>	Name	Folder	Schedules
<input type="checkbox"/>	Category Report	Personal Reports	1

The **Delete** button will remove the schedules for the selected report. Reports are selected by clicking the applicable checkbox.

Note:

Reports are not deleted. Only the schedules for the report will be deleted.

A search control may be presented for the *Scheduled Reports* page. Enter the search criteria in the textbox and click on the **Find Scheduled Reports** button. The search will find reports based on a “contains” test. To clear the search criteria click on the **x** in the text box. The availability of the search feature is configurable.

The list of scheduled reports may be sorted by clicking on either the *Name* or *Folder* column header.

Click on the report *Name* link to run the report.

Click on the *Folder* link to navigate to the folder containing the report.

Click on the schedule count link to view the schedules for the report. From that page, the administrator may create new schedules for the report, remove schedules and modify schedule information.

Archives

The Archives page allows administrators to view the complete archive for any individual report. Administrators can delete an individual report from the archive or delete the entire archive. An archive snapshot may also be mailed.

Select **Archives** from the *Report Configuration* drop-down list to display the *Scheduled Reports* configuration page.

Archives ?

Delete Archives

<input type="checkbox"/>	Name	Owner	Folder	Last Archive	Archive Count
<input type="checkbox"/>	Category Report	Admin		3/12/2014 2:00:58 PM	1

Note:

The **Archives** option will not be presented unless archiving is enabled and at least one report for the current reporting database has been archived.

Click a report's name in the *Name* column to view the report in a new browser window.

Click the number in the *Archive Count* column to view all archives associated to the report.

The reports with archives may be sorted by clicking on either the *Name* or *Owner* column header.

All of the archives for a report may be deleted by selecting the report with the applicable checkbox and clicking on the **Delete Archives** button. Click on the **OK** button to confirm the deletion.

To view the archive(s) associated to a report, click the number in the *Archive Count* column next to the corresponding report. The Archive page will be displayed for the report.

User Configuration ▾ Database Configuration ▾ **Report Configuration** ▾ Application

Configuration > Archives > **Archive for 'Category Report' Report** ⓘ

Delete Archives Back to Archives

<input type="checkbox"/>	Archived Date	Owner	Actions
<input type="checkbox"/>	3/12/2014 2:01:03 PM	Admin	

Click on the *Archived Date* or *Owner* column headers to sort the archive list.

Click the date from the *Archived Date* column to view the archived report in a new browser window.

The icon indicates that only one action can be performed on the archive. Click on the icon to email the archive report. Enter a recipient address and subject. Click on the **Send** button to email the report.

Note:

Archives can be centrally managed through the Management Console. Refer to the *Management Console Usage Guide* for details regarding managing the archive folders.

Report Settings

The *Report Settings* page allows the administrator to optimize report performance and appearance. Some settings determine the behavior of the application and take effect immediately. Others, on the other hand, may only work for new or re-built reports.

Select **Report Settings** from the *Report Configuration* drop-down list to display the *Report Settings* configuration page.

Note:

The following Report Settings image reflects the page when the Active SQL feature is enabled. See the Special Application Settings section of this document for more information on setting the Active SQL attribute in the `_Settings.lgx` file.

User Configuration ▾ Database Configuration ▾ **Report Configuration ▾** Application Settings

Report Settings ?

i The settings below determine the behavior of the application and take effect immediately.

Design-time Validation: ?

i The settings below set limits and features of new reports. You can apply these settings to an existing report by rebuilding it.

Apply data format to Excel exports: ?

Max List Records: ?

i The settings below determine default values for the report wizard and will be used for new reports only.

Default rows per report page: ?

Default rows per sub-report page: ?

Default printable page size: ?

Default Template: ?

New Report (Preview) Date: Tuesday, February 4, 2014
Time: 4:20:54 PM

Order ID	Customer ID	Order Date	Ship Via	Ship Name	Ship Region	Freight
10240	VNET	1/20/1996	3	McVies et al. Inc. Chevrolet		\$13.00
10243	TOMSP	1/6/1996	1	Tome Specialties		\$12.00
10250	HANAR	1/6/1996	2	Hanai Games	RJ	\$66.00
10251	VICTE	1/6/1996	1	Virtualles en stock		\$41.00
10252	SURRO	1/9/1996	2	Suprinas delices		\$61.00
10253	HANAR	1/11/1996	2	Hanai Games	RJ	\$68.00
10254	CHOPIS	1/11/1996	2	Chopney Chinese		\$23.00
10255	INCISJ	1/12/1996	3	Ruber Supermark		\$148.00
10256	WELLI	1/15/1996	2	Wellington Importadora	SP	\$14.00
10257	HAAA	1/16/1996	3	HILASON-Alabasta	Tachira	\$82.00
10258	ERNBH	1/17/1996	1	Enel Handel		\$141.00
10259	CENTC	1/18/1996	3	Centro comercial Mictozoma		\$3.00
10260	OTTK	1/18/1996	1	Oktes Kabaalsten		\$66.00
10261	QUEDC	1/18/1996	2	Que Detico	RJ	\$3.00
10262	SAUTC	1/22/1996	3	Rapibonate Canyon Grocery	MM	\$48.00
10263	ERNBH	1/23/1996	3	Enel Handel		\$146.00
10264	FOKXO	6/9/2007	3	Folk rock to HD		\$4.00

Page: 1 of 49

Click on the ? icon to display brief help with an attribute.

Design-time Validation is built into several steps of the Report Builder to ensure that invalid values and bad syntax do not affect reports at runtime. Design-time validation improves usability by informing users of potential problems before they occur. Administrators can disable this functionality to improve the performance of the Report Builder but do so at their own risk.

Apply data format to excel exports determines the formatting of columns when a report is exported to excel. The following values can be selected from the dropdown

- **Always:** The Excel columns will be formatted same as columns data type.
- **Exclude Dates:** All the columns will be formatted with the exception of Date/Time columns
- **Never:** No formatting will be applied. All columns will be formatted as string.

Max List Records¹ specifies the maximum number of records returned when using **In List** report parameters. It is recommended to keep this number as small as possible to improve performance and keep drop-down lists manageable. Enter **0** (zero) to disable this feature. The maximum value is 64,000.

Default rows per report page is the default number of rows shown in the first layer of each report. From the Report Builder, the end user has the option of overriding the default value in the Table Settings panel.

Default rows per subreport page is the default number of rows shown in the drill-down layers of grouped reports. From the Report Builder, the end user has the option of overriding the default value in the Table Settings panel.

Default printable page size is the default page size selected for printable paging in reports.

Default Template is the stylesheet that will be selected by default for each new report. This is also the stylesheet that will be used to display and verify any new Presentation Styles.

Click on the **Save** button to commit any changes.

Note:

The following Report Settings image reflects the page when the Active SQL feature is disabled. See the Special Application Settings section of this document for more information on setting the Active SQL attribute in the `_Settings.lgx` file. Only the attributes that haven't been previously discussed in this Report Settings section are discussed.

User Configuration ▾ Database Configuration ▾ **Report Configuration ▾** Application Configuration ▾

Report Settings ?

i The settings below determine the behavior of the application and take effect immediately.

Design-time Validation: ?

i The settings below set limits and features of new reports. You can apply these settings to an existing report by rebuilding it.

Max Records: ?

Show message if maximum records reached: ?

Show message if no records returned: ?

Row count message: [row count] ?

Row count message style: ?

Apply data format to Excel exports: ?

Max List Records: ?

i The settings below determine default values for the report wizard and will be used for new reports only.

Default rows per report page: ?

Default rows per sub-report page: ?

Default printable page size: ?

Default Template: ?

New Report (Preview) Date: Friday, March 07, 2014
Time: 4:08:33 PM

Page 1 of 2

Order ID	Customer ID	Order Date	Ship Via	Ship Name	Ship Region	Freight
10248	VNET	1/29/1996	3	w/Ves et al/colls Chevrolet		\$33.00
10249	FOAMP	7/6/1996	1	Toms Spezialstaten		\$12.00
10250	HAWAR	7/8/1996	2	Hawai Games	RJ	\$90.00
10251	VCTE	7/8/1996	1	Vicualtes an stock		\$41.00
10252	SUPRO	7/9/1996	2	Suplmes offices		\$61.00
10253	HAWAR	7/11/1996	2	Hawai Games	RJ	\$58.00
10254	CHOPS	7/11/1996	2	Chop sury Cheese		\$23.00
10255	RCSU	7/12/1996	3	Richter Supermark		\$148.90
10256	WELU	7/12/1996	2	Wologun Importadora	SP	\$16.00
10257	HLAA	7/19/1996	3	HLADON/Abatias	Tactra	\$82.00
10258	ERNGH	7/17/1996	1	Ernst Handel		\$141.90
10259	CENTC	7/18/1996	3	Centro comercial Mochizuma		\$3.00
10260	OTPA	7/19/1996	1	Ottava Karabaten		\$55.00
10261	QAEDE	7/19/1996	2	Qui DeLisa	RJ	\$3.00
10262	BA TIC	7/23/1996	3	Bathesata Canyon Grocery	MM	\$48.00
10263	ERNGH	7/23/1996	3	Ernst Handel		\$148.90
10264	FOLKO	6/9/2007	3	Folk och fo HD		\$4.00

Save

Max Records specifies the maximum number of records returned for a report. The number specified in the Max Records field applies to reports and sub-reports. Database performance is improved, but users may not see all the results in a report. Enter **0** (zero) to disable this feature. The maximum number is 64,000.

Show message if maximum records reached specifies whether or not a warning will be displayed in the report when more rows are returned than is allowed by the *Max Records* limit.

Show message if no records are returned specifies whether or not a warning will be displayed in the report when no rows are returned.

If the end user chooses to show number of records returned in a data section, the *Row count message* will be displayed, with [row count] replaced with actual number of records.

Row count message appearance will apply the selected stylesheet class to the message.

Chapter 4

Application Configuration

The Application Configuration option allows the administrator to set attributes that have “instance scope”. The attributes impact the way that the Ad Hoc interface behaves. From the Application Configuration option, the administrator may change

- Application Settings – attributes that affect the overall Ad Hoc instance
- Session Parameters – define session parameters and values.

Note:

The **Session Parameters** configuration option will appear under **User Configuration** if the ability to define *Organizations* has been enabled.

Application Settings

The *Application Settings* page allows the administrator to set general application and Report Builder settings. All application setting modifications will take affect with the next user login session.

Select **Application Settings** from the *Application Configuration* drop-down list to display the *Application Settings* configuration page.

Although presented in a single page in Ad Hoc, the *Application Settings* attributes are sub-divided into General application settings, Report settings and Password Management in this document.

Click on the  icon to display brief help with an attribute.

General application settings

User Configuration ▼
Database Configuration ▼
Report Configuration ▼
Application Settings

Application Settings ?

General application settings:

Rows per page:	<input style="width: 90%;" type="text" value="12"/>	?
List Search Options:	<input type="radio"/> Never show <input type="radio"/> Always show <input checked="" type="radio"/> Show if the list contains equal to or more than	?
	<input style="width: 60%;" type="text" value="12"/> rows	
Show Password Entry Option:	<input checked="" type="checkbox"/>	?
Delete archives with report:	<input type="checkbox"/>	?
Unique report/folder name:	<input checked="" type="checkbox"/>	?
First Day of Fiscal Year:	<input style="width: 60%;" type="text" value="January"/> <input style="width: 30%;" type="text" value="01"/>	?

Rows per page determines if paging is performed on the grids in the user interface and how many rows will appear per page. A value greater than **0** turns the paging feature on and dictates the number of row per page. A value of **0** turns paging off and all rows are displayed in one list.

List Search Options determines whether or not to include a search filter in pages with grids. If the 'Show only...' option is selected, specify a value between 1 and 100 to display the Find feature when the specified value is exceeded.

Show Password Entry Option determines a user's ability to modify their password from within the application. If checked, the Users will be able to modify their passwords using the Profile webpage. Customers integrating a proprietary authentication schema within the application may want to disable password entry.

Delete archives with report determines if a report's Archives are automatically deleted when the report is deleted. If checked, the Archives for a report will be deleted if the report is removed. Setting this option to true might result in decreased performance when a report is deleted. A backup of deleted reports and archives are located in the [_Definitions_Reports_Backup](#) folder.

Unique Report/Folder name determines whether duplicate reports/folders are permitted in the instance. If this option is enabled on an instance with duplicate items, a dialog will be presented to allow the duplications to be resolved.

First Day of Fiscal Year sets the reference value for calculation of pre-defined date tokens of “fiscal year” nature. Pre-defined dates are used in parameters throughout the application.

Report settings

Report settings:

Report Hyperlink target window: ?

Show a disabled link to no-access reports: ?

Show live preview: ?

Encoding: ?

None
 Days
 Date ?

Render animated charts as: ?

Report Hyperlink target window sets the target window for the hyperlinks to run the reports. The valid values can be:

- **_blank** renders the report in a new window without frames. This is the default value.
- **_parent** renders the report in the immediate frameset parent.
- **_self** renders the report in the frame with focus.
- **_top** renders the report in the full window without frames.

Show a disabled link to no-access reports determines whether a user will be able to see a report to which they do not have access. If checked, reports will show as a disabled link if the user does not have access to any of the objects or columns used in the report. If unchecked, the reports will be hidden.

Show live preview determines the availability of the Live Preview panel in the Report Builder.

Encoding determines the default character encoding for this application. The default value is **UTF-8 (Unicode)**.

Default Report Expiration Date determines the when reports will automatically expire. The options are:

- None – no default value is set
- Days – reports will expire a set number of days after creation
- Date – reports will expire on a set date

Render animated charts as determines the technology used to display animated charts; either Flash or HTML5.

Password Management

Password Management:

Require change of password at logon: ?

Require change of password every days ?

Minimum password length: ?

Maximum password length: ?

New Password must be different.
 Include at least one Uppercase letter. ?
 Include at least one number.
 Include at least one special character (~_[]#\$%*~).

Require change of password at logon determines if the users will be required to change their password when they login for the first time and/or after a specified number of days.

Require change of password every n days determines the number of a days a user's password will expire and they will be required to change their password on login.

Minimum password length and *Maximum password length* set the rules for the size of the password.

Password Restrictions determines the required content (strength) of a password.

Click on the **Save** button to store the attributes. The attributes on the *Application Settings* page are either stored in the *_Settings.lgx* file, stored in the metadata database or impact records in the metadata database.

Session Parameters

The Session Parameters screen allows the system administrator to create one or more *session variables*. The session parameters simply relate values to a name which can be used in an @Session token. They are commonly used in data object filters, but may be used throughout the Ad Hoc instance.

Session variables are part of the .NET Framework and hold a specific value for the duration of the user session. Each session variable is initialized with a specified value when users log in to the application. The value is either the default value set on this page, a value that has been set for the organization, or a value passed to the Ad Hoc instance from a parent application.

Select **Session Parameters** from the *Application Configuration* drop-down list to display the *Session Parameters* configuration page.

The screenshot shows the 'Session Parameters' configuration page. At the top, there are four navigation tabs: 'User Configuration' (selected), 'Database Configuration', 'Report Configuration', and 'Application'. Below the tabs, the page title is 'Session Parameters' with a help icon. There are two buttons: 'Add' and 'Delete'. Below the buttons is a table with the following structure:

<input type="checkbox"/>	Parameter Name	Type	Default Value	Actions
<input type="checkbox"/>	Country	Text	CA	>

The **Add** button will display an empty *Session Parameter Details* dialog.

The **Delete** button will remove the selected session parameter. Session parameters are selected by clicking on the applicable checkbox.

Click on the *Parameter Name* column header to sort the list.

Note:

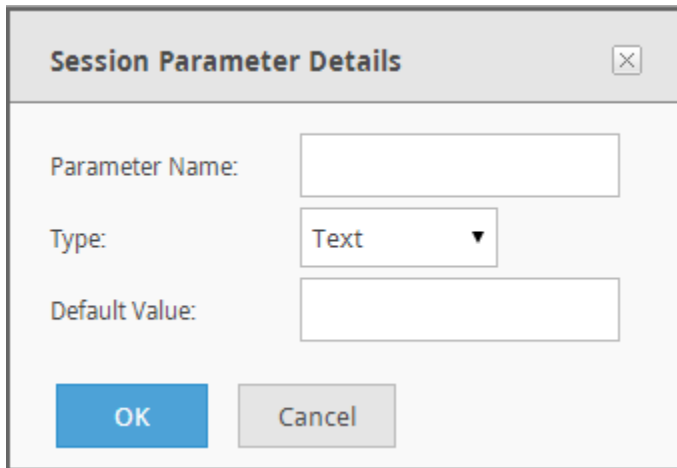
Number and Numeric List session parameters must have a default value.

Note:

The following syntax may be used to reference a session parameter:
 @Session.<parameter_name>~ where <parameter_name> must exactly match the session parameter name, including character case.

Adding a Session Parameter

To add a session parameter, click on the **Add** button to open the following dialog:



The dialog box is titled "Session Parameter Details" and contains the following fields and buttons:

- Parameter Name:** A text input field.
- Type:** A dropdown menu currently showing "Text".
- Default Value:** A text input field.
- Buttons:** "OK" (blue) and "Cancel" (grey).

The *Parameter Name* attribute is how the session parameter will be referenced throughout the application.

The *Type* attribute defines one of the parameter types recognized by Logi Ad Hoc. The *Type* will be used along with the usage context to determine which session parameters to display to the end user. For example, "Text" session parameters should not be presented as options in the Logi Ad Hoc user interface when the context clearly calls for a numeric or date value.

The *Types* include:

- Date – the session parameter value is expected to be a date and the parameter will be available in date contexts
- Number – the session parameter value is expected to be a number and the parameter will be available in numeric contexts
- Numeric List – the session parameter value is expected to be a list of numbers and the parameter will be available for numeric "In List/Not In List" contexts
- Text – the session parameter value is expected to be a string of characters and will be available in string contexts
- Textual List – the session parameter is expected to be a list of string values and will be available for text based "In List/Not in List" contexts

Note: When one of the “list” types is selected the dialog will be adjusted to allow specification of a list of values as shown below:

The screenshot shows a dialog box titled "Session Parameter Details" with a close button (X) in the top right corner. It contains three input fields: "Parameter Name:" (a text box), "Type:" (a dropdown menu currently showing "Numeric List"), and "Default Value:" (a larger text area). Below these fields is a light blue informational banner with an information icon and the text: "Please use the Enter key to separate items in a data entry list." At the bottom of the dialog are two buttons: "OK" (highlighted in blue) and "Cancel" (greyed out).

Note: If a “Date” type is selected, the dialog will be adjusted and a date picker control will be displayed as shown below:

The screenshot shows the same "Session Parameter Details" dialog box, but with the "Type:" dropdown menu set to "Date". The "Default Value:" field now includes a date picker icon (a small calendar grid) to its right. The "OK" and "Cancel" buttons remain at the bottom.

The *Default Value* attribute, in the absence of any over-rides based on Organization or User, will be supplied to the application when the session parameter is resolved during the execution of reports.

Modifying a Session Parameter

The Session Parameters page presents a list of session parameters similar to the following:

Session Parameters ?

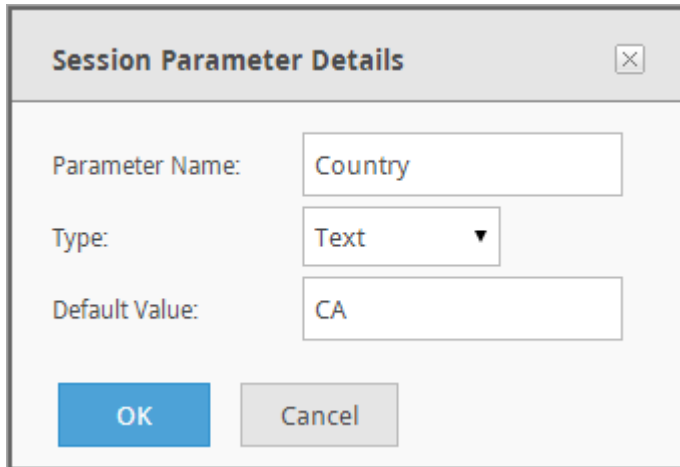
Add Delete

<input type="checkbox"/>	Parameter Name	Type	Default Value	Actions
<input type="checkbox"/>	Country	Text	CA	>

The session parameters may be sorted by clicking on the *Parameter Name* column header.

Four actions are available for each session parameter; **Modify Session Parameter**, **Delete Session Parameter**, **Set by Organization** and **Set by User**.

Selecting the **Modify Session Parameter** action will present a dialog to capture the new session parameter value. For text and numeric type session parameters, the dialog would appear as:



The image shows a dialog box titled "Session Parameter Details" with a close button (X) in the top right corner. The dialog contains three input fields: "Parameter Name" with the value "Country", "Type" with a dropdown menu showing "Text", and "Default Value" with the value "CA". At the bottom of the dialog are two buttons: "OK" (highlighted in blue) and "Cancel".

Adjust the *Parameter Name*, *Type*, or *Default Value* information and click on the OK button to save the information.

Note: Changing the *Default Value* will change the attribute value for all Organizations and Users that are following the default values.

Note: The change is immediate and may affect the current session. It is not necessary to logout and re-establish the session if the changes are impactful to the current user. Other user sessions are not affected by the changes until the user's login.

Selecting the **Set by Organization** action will present a page similar to the following:

Session Parameters > Session Parameter 'Country' for Organizations ?

Selected Session Parameter: Country
Default Value: CA
Type: Text

Restore Default Set Value

<input type="checkbox"/>	Organization	Follow Default	Parameter Value	Actions
<input type="checkbox"/>	Default	<input checked="" type="checkbox"/>	<input type="text"/>	>
<input type="checkbox"/>	Human Resources	<input checked="" type="checkbox"/>	<input type="text"/>	>

Save Back to Session Parameters

The *Selected Session Parameter* defaults to the session parameter that was used to navigate to the page. It is also a convenient option to switch the session focus for the page without having to return to the list of session parameters.

The *Default Value* and *Type* of the session parameter are displayed for informational purposes.

A list of organizations is presented in the grid. The grid may be sorted by clicking on either the *Organization* or *Follow Default* column headers.

The **Restore Default** button will set the *Parameter Value* to the displayed *Default Value* for all selected Organizations.

The **Set Value** button will present a dialog to capture a new value and apply the value to all of the selected Organizations.

The *Follow Default* checkbox indicates whether the parameter value should adopt the Default Value. This also allows the parameter value to be set “permanently”, meaning that changes to the *Default Value* will have no impact on the parameter value for the organization, if the *Follow Default* checkbox is unchecked.

The grayed *Parameter Value* text boxes are not disabled. The gray is a visual cue that the value is the same as the default value and is expected to follow the default value. That means that if the default value changes, the organization will automatically pick up the new value.

The *Parameter Value* may be changed by either typing directly into the text box or selecting the **Modify** action and providing a new value. The parameter value may also be changed by selecting the **Restore Default** action.

Click on the **Save** button to store the session parameter values for the Organization.

Note: The **Set by Organization** action will not be presented from the *Session Parameters* page if the Logi Ad Hoc instance has not been configured to allow the specification of Organizations.

Selecting the **Set by User** action will present a page similar to the following:

User Configuration ▾
Database Configuration ▾
Report Configuration ▾
Application

Session Parameters > **Session Parameter 'Country' for Users** ?

Selected Session Parameter: Country ▾

Type: Text

Default Value: CA

Role: All ▾

Restore Default
Set Value

	User	Follow Default	Parameter Value	Actions
<input type="checkbox"/>	Admin	<input checked="" type="checkbox"/>		>
<input type="checkbox"/>	jim	<input checked="" type="checkbox"/>		>

Save
Back to Session Parameters

The *Selected Session Parameter* defaults to the session parameter that was used to navigate to the page. It is also a convenient option to switch the session focus for the page without having to return to the list of session parameters.

The *Type* attribute identifies the session parameter type; date, number, numeric list, text, or textual list.

The *Organization* dropdown list in the main menu (not shown) is used to filter the user list by their respective organization. The *Organization* dropdown list is only displayed in the page when the Logi Ad Hoc instance is configured to allow multiple organizations and when more than one organization exists.

The *Default Value* reflects the current default value for the session parameter. The actual value may be the original application scope session parameter value or the organization scope parameter value.

The *Role* dropdown list allows the list of user to be filtered by role.

A list of users is presented in the grid. The grid may be sorted by clicking on either the *User* or *Follow Default* column headers.

The **Restore Default** button will set the *Parameter Value* to the displayed *Default Value* for all selected Users.

The **Set Value** button will present a dialog to capture a new value and apply the value to all of the selected Users.

The *Follow Default* checkbox indicates whether the parameter value should adopt the *Default Value*. This also allows the parameter value to be set “permanently”, meaning that changes to the *Default Value* will have no impact on the parameter value for the user, if the *Follow Default* checkbox is unchecked.

The grayed *Parameter Value* text boxes are not disabled. The gray is a visual cue that the value is the same as the default value and is expected to follow the default value. That mean that if the default value changes, the user will automatically pick up the new value.

The *Parameter Value* may be changed by either typing directly into the text box or selecting the **Modify** action and providing a new value. The parameter value may also be changed by selecting the **Restore Default** action.

Click on the **Save** button to store the session parameter values for the User.

Chapter 5

Report Management

The system administrator has the ability to manage reports for each user in every organization.

There are four main locations to store reports:

- Personal Reports
- Shared Reports
- All Reports
- Global Reports

Personal Reports is the system administrator's personal repository for storing reports and report folders.

Shared Reports enables users to share reports and report folders. System administrators have complete control over shared reports for every user and organization.


All Reports allows the system administrator to view, copy and schedule any report that exists in the Ad Hoc instance.

Global Reports allows the system administrator to share reports across all organizations. Reports placed in the Global Reports area are visible to all users with the right to view the global reports area.

Sharing Any Report

Administrators have the ability to share reports with all end users or a specific end user. For example, the administrator can create a report demonstrating a particular reporting style or concept and share it with all users. Alternatively, administrators can build a report intended for a single user or user group.


Personal Reports	Shared Reports	All Reports	Global Reports
------------------	----------------	-------------	----------------

Personal Reports > Copy Report 'Category Report' 

Report Name:


Current Owner: Admin

Description:

Expiration Date: 

Destination Folder Type:


To share a report with all users of a specific Database connection:

1. Locate the report to be shared.
2. Hover the mouse over the  icon to display the available actions and click on the **Copy** or **Move** options.
3. OPTIONAL: If copying, then modify the **Report Name**, **Description** and **Expiration Date**³.
4. Select **All** from the Organization drop-down menu.
5. Click **Save** to share the report.
6. The report shall be placed into the Shared Reports area of all the organizations currently listed in the organization drop-down menu.


Notes:

1. The **Report Name** and **Description** cannot be changed when moving a report.
2. When a report(s) is copied, the report's name will be prefixed with **Copy of (#)** in order to distinguish them from the original. The "(#)" will only occur after a report is copied more than once.
3. An **Expiration Date** is used to designate when a time sensitive report is deemed obsolete. The date must be a date greater than the current date.
4. Any corresponding report archives are not copied with the report. Report archives are only transferred when moving a report.

To share a report with users from a specific organization:

1. Locate the report to be shared.
2. Hover the mouse over the  icon to display the available actions and click on the **Copy** or **Move** options.
3. OPTIONAL: If copying, then modify the **Report Name**, **Description** and **Expiration Date**.
4. OPTIONAL: From the **Organization** drop-down menu, select an organization.
5. From the **Folder Type** drop-down menu, select *Shared Reports*.
6. OPTIONAL: From the **Folder** tree, locate and select a folder to store the report in.
7. Click **Save** to share the report.

To share a report with a specific user:

1. Locate the report to be shared.
2. Hover the mouse over the  icon to display the available actions and click on the **Copy** or **Move** options.
3. OPTIONAL: If copying, then modify the **Report Name**, **Description** and **Expiration Date**.
4. OPTIONAL: From the **Organization** drop-down menu, select an organization.
5. From the **Folder Type** drop-down menu, select *All Personal Reports*.
6. From the **New Owner** drop-down menu, select a specific user.
7. OPTIONAL: From the **Folder** tree, locate and select a folder to store the report in.
8. Click **Save** to share the report.

Linking Reports

Administrators have the ability to enable drill-through functionality by offering a hyperlink in one report (a.k.a., source report) to launch the view of another report (a.k.a., linked report). When the hyperlink in the source report is selected, record-level specific data is passed from the source report to the linked report's respective parameters.

Column Name	Label	Link	Actions
CustomerID	Customer ID	Customer Details	>
CompanyName	Company Name	http://www.google.com	>
ContactName	Contact Name		>
ContactTitle	Contact Title		>
Address	Address		>



CustomerID	CompanyName	Address	City	Country
ALFKI	Alfreds Futterkiste	Obere Str. 57	Berlin	Germany
ANATR	Ana Trujillo Emparedados y helados	Avda. de la Constitución 2222	México D.F.	Mexico
ANTON	Antonio Moreno Taquería	Mataderos 2312	México D.F.	Mexico
AROUT	Around the Horn	120 Hanover Sq.	London	UK
BERGS	Berglunds snabbköp	Berguvsvägen 8	Luleå	Sweden
BLAUS	Blauer See Delikatessen	Forsterstr. 57	Mannheim	Germany
BLOMP	Blondesddsl père et fils	24, place Kléber	Strasbourg	France
BOLID	Bólido Comidas preparadas	C/ Araquil, 67	Madrid	Argentina
BONAP	Bon app'	12, rue des Bouchers	Marseille	France
BOTTM	Bottom-Dollar Markets	23 Tsawassen Blvd.	Tsawassen	Canada

Linking two existing reports is a two-part process:

1. Create the linked report. Any report may be the target of a link.
2. Configure a link on a data object's column which can be enabled in a source report.

Note:

Avoid using "Ask" parameters within linked reports.

To configure a link on a data object's column, refer to the **Setting Links** section of the System Administration Guide for information about setting up a link parameter to a report created in the application.

Users building reports have the option of disabling object links from the Report Builder.

Chapter 6

Permission Packages

Permission packages are groupings of individual application rights that system administrators can assign to users. Administrators can create custom permissions or use the ones installed with the application. The following permission packages are installed with the application:

- **System Administration** - allows every right in the application
- **End User** - view, create, modify, rename and delete personal reports and folders; archive personal reports; create reports in tabular, bar chart and pie chart presentation formats
- **Power End User** - View, create, modify, rename and delete personal reports and folders; archive personal reports; create reports in tabular, bar chart and pie chart presentation formats
- **Manage Personal Reports** - view, create, modify, rename and delete personal reports and report folders; copying is allowed to any destination where "report creation" right exists
- **View Personal Reports** - allows viewing of personal reports; copying is allowed to any destination where "report creation" right exists
- **Manage Shared Reports** - view, create, change, rename and delete shared reports as well as personal folders; copying is allowed to any destination where "report creation" right exists
- **View Shared Reports** - allows viewing of shared reports; copying is allowed to any destination where "report creation" right exists
- **Manage All Personal Reports** - view, create, change, rename and delete all reports as well as personal folders; copying is allowed to any destination where "report creation" right exists
- **Schedule and Archive Reports** - allows scheduling and archiving of any reports that are available to view as well as viewing of archived reports
- **Access Configuration Area** - allows access to the configuration menu and its underlying sub-menus
- **Administer User's Group** - allows administrative rights in report management area plus user management in configuration for the user's group

Note:

Users can have multiple assigned permissions.

The following table shows the complete set of *Report Management* rights with respect to permission packages:

Report Management	Permission Packages									
	System Administration	End User	Power End User	Manage My Personal Reports	View My Personal Reports	Manage Shared Reports	View Shared Reports	Manage All Personal Reports	Schedule and Archive Reports	Administer User's Group
Archive reports	✓								✓	✓
Create/Modify/Delete all reports from Shared Reports area	✓					✓				✓
Create/Modify/Delete folders from Global Reports area	✓									
Create/Modify/Delete folders from My Personal Reports area	✓	✓	✓	✓						✓
Create/Modify/Delete folders from Shared Reports area	✓					✓				✓
Create/Modify/Delete own folders from Shared Reports area	✓					✓				✓
Create/Modify/Delete own reports from Shared Reports area	✓					✓				✓
Create/Modify/Delete reports from Global Reports area	✓									
Create/Modify/Delete reports from My Personal Reports area	✓	✓	✓	✓						✓
Delete archives from My Personal Reports area	✓	✓	✓	✓						✓
Delete archives from Shared Reports area	✓					✓				✓
Delete archives in All Personal Reports area	✓							✓		✓
Manage user group reports	✓									
Manage user Preferences	✓	✓	✓	✓	✓	✓	✓	✓		✓
Modify/Delete folders in All Personal Reports area	✓							✓		✓
Modify/Delete reports in All Personal Reports area	✓							✓		✓
Rename reports from All Personal Reports area	✓							✓		✓
Rename reports from Global Reports area	✓									
Rename reports from My Personal Reports area	✓	✓	✓	✓	✓					✓
Rename reports from Shared Reports area	✓					✓				✓
Right to add bar charts to reports	✓	✓	✓							✓
Right to add calculated columns to reports	✓		✓							✓
Right to add crosstab to reports	✓		✓							✓
Right to add heatmaps to reports	✓		✓							✓
Right to add images to reports	✓		✓							✓
Right to add line charts to reports	✓	✓	✓							✓
Right to add pie charts to reports	✓	✓	✓							✓
Right to add scatter charts to reports	✓		✓							✓
Right to add Send Mail button to reports	✓		✓							✓
Right to export reports to CSV format ⁽³⁾	✓		✓							✓

Permission Packages										
Report Management	System Administration	End User	Power End User	Manage My Personal Reports	View My Personal Reports	Manage Shared Reports	View Shared Reports	Manage All Personal Reports	Schedule and Archive Reports	Administer User's Group
Right to export reports to Excel format ⁽³⁾	✓		✓							✓
Right to export reports to MS Word format ⁽³⁾	✓		✓							✓
Right to export reports to PDF format ⁽³⁾	✓		✓							✓
Right to export reports to XML format ^(3,4)	✓		✓							✓
Right to set advanced settings for charts	✓		✓							✓
Right to set URL for an image	✓									✓
Right to upload images from client	✓									✓
Right to view dependencies	✓									✓
Schedule reports from All Personal Reports area ⁽⁵⁾	✓								✓	✓
Schedule reports from My Personal Reports area ⁽⁵⁾	✓								✓	✓
Schedule reports from Shared Reports area ⁽⁵⁾	✓								✓	✓
Subscribe to Scheduled Reports	✓		✓						✓	✓
View archived reports	✓								✓	✓
View report owner's name	✓									✓
View reports in All Personal Reports area	✓							✓		✓
View reports in Global Reports area	✓									
View reports in My Personal Reports area	✓	✓	✓	✓	✓					✓
View reports in Shared Reports area	✓	✓	✓			✓	✓			✓

Notes:

1. The "Right to export reports to..." Rights also control the ability of a user to initiate the export of a rendered report in the specified format.
2. Users assigned the "Right to export reports to XML format" Right may or may not have access to the feature based on the overall setting for this feature in the Application Settings webpage.
3. The "Schedule reports from..." Rights automatically allow the user to subscribe to scheduled reports.

The following table shows the complete set of *Configuration* rights with respect to permission packages:

Configuration	Permission Packages		
	System Administration	Access Configuration Area	Administer User's Group
Manage application settings	✓		
Manage archived reports	✓	✓	✓
Manage cascading filters	✓		
Manage data formats	✓	✓	
Manage data objects	✓	✓	
Manage permissions	✓		
Manage presentation styles	✓	✓	
Manage relationships	✓	✓	
Manage report settings	✓	✓	
Manage roles	✓		
Manage scheduled reports	✓	✓	✓
Manage user groups	✓		
Manage users	✓		✓
Manage virtual views	✓	✓	

Chapter 7

Special Application Settings

This chapter describes special application functionality that administrators can toggle on and off. The application settings listed in this chapter must be enabled or disabled by setting an attribute value in the application's `_Settings.lgx` file definition. The `_Settings.lgx` file definition is located in the `_Definitions` folder within the application installation directory.

The following attributes can be set in the Constants element, in addition to those listed in chapter 4's Application Settings section:

- **ahFormatExcel**

Set this attribute to enable or disable the formatting of column data as text when exporting to the Excel format. By default, the attribute value is **True** and thus exported data is formatted as per the specified display format or defined data type.

Example: `<Constant ahFormatExcel="False" />`

Note:

When this attribute is enabled, only new or modified reports will be affected.

- **ahHideConnection**

Set this attribute to enable the hiding of all database connection strings in the connection field of the Database Administration and Manager utilities.

Example: `<Constants ahHideConnection="True" />`

- **ahServerCSV**

Set this attribute to enable the server-side 'Export to CSV' plug-in. For reports having the 'Export to CSV' feature specified, this plug-in allows a report to be viewed without row limits on the query and generates a CSV file that can be saved wherever. Two points of caution:

1. The plug-in works with only one Data Table in the report.
2. The plug-in works only for SQL Server and ORACLE queries.

Example: `<Constants ahServerCSV="True" />`

- **DefaultDateReformat**

Set this attribute to configure the date format for pre-defined dates (e.g., First Month End, Last Month End, etc.) to comply with the standard ISO format of "yyyy-MM-dd".

Example: `<Constants DefaultDateReformat="yyyy-MM-dd" />`

The following attributes can be added to the Constants element to configure the Hybrid Engine:

- **rdDataEngine**

Set this attribute to configure the Engine version, which will be invoked when running reports. A value of "Version8" can be entered here to invoke the old engine in case of an incompatibility with the Hybrid Engine that prevents legacy reports from running. The default value is "Version9", the Hybrid Engine.

Example: `<Constants rdDataEngine="Version8" />`

Notes:

1. For now, products will ship with both the Hybrid and Version 8 engines.
2. Please notify Logi Analytics if incompatibilities are identified because the Version 8 engine will be removed in a later release.

- **rdMemoryStreamLimit**

Set this attribute to adjust the memory caching to file system-caching threshold, in megabytes. A value of 0 will force all caching to the file system; a value of 2048, the maximum, will force all caching to memory. The default value is "10".

Example: `<Constants rdMemoryStreamLimit="8" />`

Note:

This setting only applies when the rdDataEngine constant is set to "Version9".

The following attribute can be set in a General element:

- **LogErrors**

Set this attribute to write debug HTML files to the rdErrorLog folder when there is a system error. These pages are the same as those shown when Debugger Style is set to "Debugger Links" or "Error Detail".

Example: `<General LogErrors="True" />`

The following attribute can be set in a database Connection element:

- **ahDBType**

Set this attribute to specify the specific database type to use. The default is blank. The list of available values is:

CACHE	INFORMIX	SYBASE
DB2	ORACLE	
DB2AS400	SQLSERVER	

Example: `<Connection ID="3" Label="DB2" ConnectionString="Provider=IBMDA400.DataSource.1;Password=PWD;Persist Security Info=True;User ID=LOGIADHOC;DataSource=123.345.678.900;Initial Catalog=*SYSBAS;Catalog Library List=LOGI;Convert Date Time To Char=FALSE" Type="Application" ahDBType="DB2AS400" />`

The following attribute can be set in the Globalization element:

- **FirstDayOfWeek**

Set this attribute to change how the first day of the week is determined when a report is executed. By default, Sunday is the first day of the week. This attribute may be set to a number representing a different day of the week.

0 = Sunday	3 = Wednesday	6 = Saturday
1 = Monday	4 = Thursday	
2 = Tuesday	5 = Friday	

Example: `<Globalization FirstDayOfWeek="1" />`

Note:

Since this is a global setting, it will affect all reports.

The following attributes can be set in the Ad Hoc element:

- **Device**

Set this attribute to enable detection of a mobile device and restrict the reports list to mobile reports only. Valid attribute values are:

- **PC** – the default value. Indicates that the reports list should be rendered identically to the list on the personal computer.
- **Tablet** or **Phone**– indicates that the mobile device is a tablet/phone and that the report lists should be restricted to mobile reports
- **Detect** – indicates that the system should detect the device type and if a mobile device restrict the report lists to mobile reports

- **ahShowNonAskReportParams**

Setting this attribute to "True" will display both ask and non-ask parameters in the report filter. If set to "False" the non-ask parameters will not be shown. This attribute helps resolve the case of nested report filters using a combination of ask and non-ask parameters where the parenthetical indicators might become mismatched and appear illogical.

- **ahUseActiveSQL**

Set this attribute to True to generate ActiveSQL datalayers in the report. Set it to False to generate the standard SQL datalayers. If ActiveSQL is enabled, there are a number of Ad Hoc features that are impacted, such as:

- Statistical Columns
- Crosstab extra label and value options
- Ability to use stored procedures

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 T107
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/>