Logi Ad Hoc Reporting Management Console Usage Guide



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# Introduction

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

This document discusses use of the MC.

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

**Java -**Java related content

# **Target Audience**

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

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

### **Related Documentation**

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

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



# **System Requirements**

### Components

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

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

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

The MC also may require the following:

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

### **Supported Reporting Databases**

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

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

#### Note:

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



#### Java -

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

### **Supported Metadata Databases**

The MC supports the following metadata databases:

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

Java -Oracle and MySQL are the supported metadata databases.

# Definitions

The following terminology is used with Logi Ad Hoc:

#### Instance

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

#### Metadata Database

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

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

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



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

### **Reporting Database**

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

### **Report Definition Repository**

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

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

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

#### Note:

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

### **Active Instance**

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

### **Active Connection**

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



# **Management Console Overview**

### Purpose

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

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

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

#### Note:

Due to variations in metadata structure and report definitions, Ad Hoc versions are NOT backward compatible. Creation and upgrade of instances are ONLY possible on the same server, but other management functions can be performed on instances residing on other servers.

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

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

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



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

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

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

#### Java -

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



### **Management Console Interface**

The MC interface is divided into three main panels:

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



### **Action Group Panel**

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



*Welcome* – This action group orients new users and guides them through their first experience with the MC. It also lets experienced users know what is new in this version of the MC.

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

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

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

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

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

*Tools* – This action group provides tools to share reports with other Logi products. "Publishing" is the technique that provides access to those reports. "Synchronization" is the technique that makes reports from an Ad Hoc instance available. In addition, diagnostic and cleanup tools are provided.

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

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



#### **Target Panel**

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

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

#### Note:

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

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

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

### **Actions Panel**

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

### **Welcome Screen**

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

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

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

### **Getting Started Screen**

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



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

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



# Management of Ad Hoc Reporting Instances

# **Creating an Ad Hoc Instance**

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

The MC provides two techniques for doing this:

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

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

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

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



New Instance	
Select a new or empty folder, name of virtual directory and shortcut settings for the new Logi Ad Hoc Reporting instance.	
Application Path:	
Browse	
Virtual Directory Name:	
Shortcut Settings	
All Users      Current User	
Program Group:	
Logi Ad Hoc Reporting	
Shortcut Name:	
Get help with managing instances	
Create Cancer	

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

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

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

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

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

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



#### Java -

Only the Application Path is displayed in the dialog box.

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

#### Note:

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

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

Once an Ad Hoc instance has been created and a reporting schema has been established in the metadata database, the instance may be accessed by clicking on the URL displayed in the Target Panel.

The default login user name is "Admin" and its password is "password".

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



# **Selecting an Instance**

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

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

The Select Instance dialog box will be displayed:

	х
Coloct Instance	
Select Instance	
Select a Logi Ad Hoc Reporting instance that you would like to manage. This will	
become the "Active" instance for all Management Console functions. You can	
select an instance from the drop-down list or browse to the root folder of an	
existing instance.	
Application Path:	
Browse	
Cat hale with managing instances	
Get neip with managing instances OK Cancel	



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

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



# **Upgrading an Instance**

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

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

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

Application			Reports		
Current Version:	11.2.64-SP6	Repair	Current Version:	11-2.64-SP6	
Target Version:	12.1.0-T26	Update	Target Version:	10.0.9 or newer	Select
	Application needs to be updated	I.		No Reports were found.	
Metadata Database			Rights		
Current Version:	unknown		Missing Rights:		
Target Version:	10.2.3 or newer	Update			
Me	tadata database needs to be upd	ated.			
Activity Log Database					
Current Version:	Log connection not set.		Current Version:	12.1.0-T26	
Target Version:	9.2.17 or newer	Update	Target Version:	10.2.0 or newer	Update
				Application rights are up-to-date.	

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



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

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

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

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

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

#### Notes:

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

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

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

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



## **Repairing an Instance**

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

Application			Reports		
Current Version:	12.1.0-T26	Repair	Current Version:	12.1.0-T26	
Target Version:	12.1.0-T26	Update	Target Version:	10.0.9 or newer	Select
	Application is up-to-date.			Reports are up-to-date.	
Metadata Database			Rights		
Current Version:	12.1.0-T26		Missing Rights:		
Target Version:	10.2.3 or newer	Update			
	Metadata database is up-to-date				
Activity Log Databa	ise				
Current Version:	Log connection not set.		Current Version:	12.1.0-T26	
Target Version:	9.2.17 or newer	Update	Target Version:	10.2.0 or newer	Update
				Application rights are up-to-date.	

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

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

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



### **Removing an Instance**

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

The following confirmation message will be displayed:



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

#### Note:

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



# **Backing Up an Instance**

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

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

Backup Instar	nce		×		
This process will create a backup file containing all of the files and related meta data for this instance, at this exact moment. Any changes that are made to the instance after this, will not be reflected in the backup and will not be present once this backup package is restored. Backed up instances can only be restored to the same version of the application.					
Select the name of a new backup file for this Logi Ad Hoc Reporting instance.					
Backup File:					
			Browse		
Backup Archives					
Encrypt Backup	Enter Password:				
	Reenter Password:				
Get help with backing up i	nstances	Create	Cancel		

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

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

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



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

#### Notes:

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

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

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



## **Restoring an Instance**

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

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

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

#### Notes:

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

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

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



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

Restore In his process will restor istance but you can de	ISTANCE ore a backup file in a selected path. The restored instance will be the same version as th hoose to restore the meta data into a new database.	X ne backed up
Backup File:	· · · · · · · · · · · · · · · · · · ·	
backup me.		Browse
Password:		
Restore Location:	ont\AHv12Inctance	Prowre
Virtual Directory Na	me:	
<ul> <li>All Users</li> </ul>	Current User	
Program Group: Shortcut Name:	Logi Ad Hoc Reporting	
Get help with restoring	ng an instance <u>N</u> ext	<u>C</u> ancel

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

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



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

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

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

#### Note:

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

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

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



Restore Instance	x					
Select the database where the Metadata will be restored.						
You can either choose to use the default SQL CE database or provide a connection string to another supported database. To use another database please create a new database using the provided scripts in database folder and change the connection string to point to it.						
Use default SQL CE Database						
Use another supported database						
Connection String:						
Data Source=Igx025;Initial Catalog=11_1_45;User Id=sa;Password=;	*					
Connection Wizards SQLCE Connection OLEDB Connection Oracle Connection MySQL Connection SQLServer Connection Test	•					
Get help with restoring an instance	cel					

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

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

Note:

To establish a new repository for the metadata, use one of the scripts provided in the Database folder of the source instance. They are DBMS specific and are named ahMetadata\_CreateUpdate\_SQLServer, ahMetadata\_CreateUpdate\_Oracle, and ahMetadata\_CreateUpdate\_MySQL.



Select the **Use another supported database** option to direct the restore utility to save the metadata

information in the new location. Either enter the connection string for the metadata database by clicking **Edit Connection String...** or run one of the Connection Wizards links.

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

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

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

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

Restore Insta	nce		×
-Report Repository			
<ul> <li>Alternative Path</li> </ul>		Browse	
<ul> <li>Database</li> </ul>	Configure Database		
<ul> <li>Dashboard Personalization</li> <li>Standard</li> </ul>	in Repository		
<ul> <li>Alternative Path</li> </ul>		Browse	
Set help with restoring an i	nstance		

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

Select one of the available options for the report repository.

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

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



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



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

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

Manage Database	
Connection External Definition	Settings
Use any of the provided wizards to buil String" for other, free-format connectior	d a connection string or click the "Edit Connection 15.
Database Connection String:	
Connection Wizards	Edit Connection String
MySQL Connection	Database: SQL Server 💌
Oracle Connection SQLServer Connection PostgreSQL Connection	Connection Type: SQL Server
	Save Close

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



Manage Database			
Connection External Definition Set	tings		
Table Name: Reports	Report Name		
	Report Definition		
Select Procedure:	Update Procedure:		
SELECT [Definition] FROM [Reports] WHERE [Name]=@ReportID	UPDATE [Reports] SET [Definition] =@Definition WHERE [Name]=@ReportID		
Insert Procedure:	Delete Procedure:		
INSERT INTO [Reports] ([Definition], [Name]) VALUES (@Definition,@ReportID)	DELETE FROM [Reports] WHERE [Name] =@ReportID		
Auto Generate Procedure SQL	Test		
	Save Close		

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

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

#### Note:

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

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





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

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

oorts.	service and determine the database connections that will be
Logi Scheduling Service	○ Windows
localhost	
туКеу	
56111	
the name of the server where the Sch he ones defined in the service.	eduler Service is installed and running. The Password and Test Scheduler Settings
	Logi Scheduling Service localhost myKey 56111 the name of the server where the Sch the ones defined in the service.

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

Note:

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



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

	g databas	se.	chine format, forder and f	Artual directory. You can also er	nable arch	iving for each
- 3	Enable	Database	Archive Report	HTML	•	
	-	Northwind	Format:	C14-451121	_	Province
			Archive folder:	C:\Arcnives\12.1		browse
			Archive Web Path	http://lgx025/12.1.Arc		
			URL:	Hint: Should look something like "http://myserver/myarchive"	e	
			Auto Archive:			
					App	bly Changes

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

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

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

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



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

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

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

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

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

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

### Note:

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


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

Restore Instance	×
Backup has been restored successfully. A log of all actions has been saved in Log folder.	
Now you can click on Finish button to close this wizard or:	
* <u>Click here</u> to view the log file.	
* <u>Click here</u> to launch the application.	
Finish	
<u>Euron</u>	

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







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

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

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



# **Configuration of an Ad Hoc Reporting Instance**

## **Configuration Wizard**

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

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

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

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

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

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

#### Note:

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



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

Configuration Wizard	×
Vou are about to configure:C\\instaub\uuuuroot\Albut\Testance	
URL: http://LUGICLASSRMPC1/AdHoc_V12/	
Version: 12.1.0-T35	
This instance has already been configured.	
The Configuration Wizard will lead you through the necessary steps to configure a working instance of Logi Ad Hoc Reporting. The steps include identifying and connecting to a reporting database, importing all or part of the schema, assigning user-friendly names to the data objects and columns, and categorizing the data objects (optional).	
It is recommended that new users use the default settings to configure a new instance of Logi Ad Hoc Reporting.	
The Advanced Options button allows the System Administrator to determine the steps that the Configuration Wizard will exercise.	
Advanced Options	
All of the steps available through the Configuration Wizard are also available through the menu options of the Management Console. Additional advanced configuration options are available from the Instance Configuration/ Application Settings dialog.	
Get help with Configuration Wizard	
Previous <u>N</u> ext <u>Cancel</u>	

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

Java -

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



The Advanced Options dialog box is shown below:

× Advanced Options
Select the tasks that you would like to perform in the Configuration Wizard by checking the step.
Required steps cannot be turned off.
Metadata Connection
Report Database Connections
Import Schema
Import Procedures*
Categorize Data Objects
Import Relationships*
Configure Scheduling
Configure Emailing
Configure Archiving
Configure Event Logging
* Import Relationships are not supported for all databases. <u>O</u> K <u>Cancel</u>

The configuration steps that require completion will be indicated.

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

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

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

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

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





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

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

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

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

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



## **Metadata Connection**

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

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

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

× Manage Metadata Database Connection Every instance requires access to a metadata database. When an instance is created it is connected to a properly initialized Sql Server CE metadata database by default.				
Use any of the connection wizards below to create the connection string to access the	the provided scripts and then			
string must grant full access to the metadata database.	dentials provided in the connection			
Connection String Data Source=C:\Program Files\12.1\Database\ahData.sdf				
Connection Wizards SOLCE Connection	Edit Connection String			
OLEDB Connection				
Oracle Connection MySQL Connection	Tert			
SQLServer Connection	1654			
Get help with metadata database connection				
Migrate to a Supported Database	<u>O</u> K <u>C</u> ancel			



### Note:

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

### Java -

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

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

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

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



Ę	) D	ta Link Properties	×		
	Prov	der Connection Advanced All			
	Se	ect the data you want to connect to:			
		OLE DB Provider(s)			
		Microsoft OLE DB Provider for Analysis Services 11.0			
		Microsoft OLE DB Provider for Analysis Services 12.0			
		Microsoft OLE DB Provider for Indexing Service			
		Microsoft OLE DB Provider for Search			
		Microsoft OLE DB Provider for SQL Server			
		Microsoft OLE DB Simple Provider			
		MSDataShape			
		OLE DB Provider for Microsoft Directory Services			
			- II		
Next >>					
	OK Cancel Help				

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

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

Build N	lySQL Connection String	×
Server:		
Database:		
Port:	3306	
User:		
Password:		
	<u>O</u> K <u>C</u> ancel	





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

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

Build Or	acle Connection String	x
Server: Service Name:		]
Port:	1521	
User:		
Password:		
	<u>O</u> K <u>C</u> ancel	

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

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

Build SQI	LCE Connection String		×
Database File:		Browse	
	<u>о</u> к	<u>C</u> ancel	

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



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

	х
Set Database Connection String	
A connection string is required to establish database connectivity. You can type in the string or copy and paste an existing connection string.	
Database Connection String:	
Data Source=C:\Program Files\12.1\Database\ahData.sdf	
OK Cancel	

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

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

Click OK to post the connection string to the <code>\_Definitions/\_Settings.lgx</code> file in the active instance folder.

#### Notes:

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

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



# **Application Settings**

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

	_	×		
Application Set	tings			
This dialog allows you to adjust	st many of the configuration settings of an Ad Hoc instance.			
Manipulation of these settings knowledge of the architecture	can have a dramatic effect on the behavior of the instance and req of Ad Hoc.	uires a thorough		
The default settings are optimi by clicking on the Restore Defa	ized for the most popular situations. You can return the settings to aults button.	their default values		
General UI Features	Reporting Options Reporting Features Security	More		
Company Name:	Logi Analytics, Inc.			
Product Name:	Logi Ad Hoc Reporting			
Instance ID:	AdHoc			
First Day of Fiscal Year:	Month Day January V 01 V			
Report Backup Folder:		Browse		
Configuration Backup Folder:		Browse		
Get help with Application Settings				
<u>R</u> estore Defaults	<u>0</u> K	<u>C</u> ancel		

The settings are organized into six tabs.

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

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

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





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

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

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

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

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

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

### **General Tab**

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

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

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

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

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

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

## **UI Features Tab**

Clicking the UI Features tab will display the following:



× Application Settings This dialog allows you to adjust many of the configuration settings of an Ad Hoc instance.				
Manipulation of these settings can have a dramatic ef knowledge of the architecture of Ad Hoc.	fect on the behavior of the instance and requires a thorough			
The default settings are optimized for the most popul by clicking on the Restore Defaults button.	ar situations. You can return the settings to their default values			
General UI Features Reporting Option	s Reporting Features Security More			
Show menu and submenu bars				
Grid Paging	List Search Options			
O	O Never show			
On	Always show			
Rows per page: 12	Show if the list contains more than     12     rows			
Report View Target				
New window				
<ul> <li>Application frame/window</li> </ul>				
Application top level window				
List no-access reports				
Get help with Application Settings				
Restore Defaults	<u>Q</u> K <u>C</u> ancel			

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

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

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

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

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



## **Reporting Options Tab**

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

				x	
Application Settings					
This dialog allows you to adjust	t many of the configuratio	n settings of an Ad Hoc ins	tance.		
Manipulation of these settings knowledge of the architecture of	can have a dramatic effect of Ad Hoc.	on the behavior of the inst	tance and requ	ires a thorough	
The default settings are optimiz by clicking on the Restore Defa	zed for the most popular s ults button.	ituations. You can return tł	ne settings to t	heir default values	
General UI Features	Reporting Options	Reporting Features	Security	More	
Report Repository Standard Alternative Path			Browse		
O Database	Configure Database.				
<ul> <li>Dashboard Personalization</li> <li>Standard</li> </ul>	on Repository				
O Alternative Path			Browse		
Get help with Application Settings         Restore Defaults					
Mestore Delauts			<u>o</u> r		

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

• The Standard default location is the Definitions/ Reports folder.



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

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

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

Manage Database	
Connection External Definition Settings Use any of the provided wizards to build a connec String" for other, free-format connections.	ction string or click the "Edit Connection
Database Connection String:	
Connection Wizards <u>OLEDB Connection</u> <u>MySQL Connection</u> <u>Oracle Connection</u> <u>SQLServer Connection</u>	Edit Connection String
PostgreSQL Connection	Test Save Close



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

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

Note:

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

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

Manage Database	
Connection External Definition Set	tings
Table Name:	Report Name Column: Report Definition Column:
Select Procedure:	Update Procedure:
Insert Procedure:	Delete Procedure:
Auto Generate Procedure SQL	Test
	Save Close



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

#### Note:

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

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

Manage Database	
Connection External Definition Se	ttings
Table Name: Reports	Report Name Name
	Report Definition
Select Procedure:	Update Procedure:
SELECT [Definition] FROM [Reports] WHERE [Name]=@ReportID	UPDATE [Reports] SET [Definition] =@Definition WHERE [Name]=@ReportID
Insert Procedure:	Delete Procedure:
INSERT INTO [Reports] ([Definition], [Name]) VALUES (@Definition,@ReportID)	DELETE FROM [Reports] WHERE [Name] =@ReportID
Auto Generate Procedure SQL	Test Save Close



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

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

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

### Note:

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

## **Reporting Features Tab**

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



				×
Application Set	tings			
This dialog allows you to adjus	st many of the configuratio	n settings of an Ad Hoc i	nstance.	
Manipulation of these settings knowledge of the architecture	can have a dramatic effect of Ad Hoc.	on the behavior of the ir	nstance and requ	uires a thorough
The default settings are optimi by clicking on the Restore Defa	ized for the most popular s aults button.	ituations. You can return	the settings to t	their default values
General UI Features	Reporting Options	Reporting Features	s Security	More
Encoding:	UTF-8 (Unicode)		•	
Default Date reformat:	уууу-MM-dd			
Show Live Preview				
Report debugger links				
Multiple Data Sources				
Multiple Connections				
Batch Scheduling				
Get help with Application Setti	ings	Γ	ОК	Cancel
			<u></u>	

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

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

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

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



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

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

#### Note:

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

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



### **Security Tab**

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

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

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



## **More Features Tab**

Clicking the More Features tab will display the following:

			×
Application Setting	S		
This dialog allows you to adjust many	of the configuration settings of an	Ad Hoc instance.	
Manipulation of these settings can ha knowledge of the architecture of Ad F	ve a dramatic effect on the behavio loc.	r of the instance and req	uires a thorough
The default settings are optimized for by clicking on the Restore Defaults bu	the most popular situations. You c utton.	an return the settings to	their default values
General UI Features Rep	orting Options Reporting F	eatures Security	More
<ul> <li>Multiple Organizations</li> <li>Unique report/folder name</li> <li>Scheduling</li> </ul>	Configure Scheduling		
Subscription	Configure Email		
Archiving	Configure Archiving		
Event Logging	Configure Logging		
Get help with Application Settings			
<u>R</u> estore Defaults		<u>о</u> к	<u>C</u> ancel

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

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

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



## Scheduling

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

## Note:

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

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

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

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



The Configure Scheduling dialog box will be displayed:

Configure S Scheduler Service	cheduling to select and configure the scheduling	service and determine the	database connection	×
permitted to schedule	reports.			
Scheduler method:	<ul> <li>Logi Scheduling Service</li> </ul>	۲	Windows	
Scheduler Account		]		
Password:		]		
Enable/Disable Sched	uling for Database Connections		Test Scheduler S	Settings
Enable		Database Connections		
	Northwind			
Get help configuring th	e Report Scheduler			
			<u>о</u> к	<u>C</u> ancel

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

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

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



## Java -

The Logi Scheduling Service is the only option available.

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

This dialog allows you to select and configure the scheduling service and determine the database connections that will be permitted to schedule reports. Scheduler method: Scheduler method: Cogl Scheduling Service Server Name Cocalhost Password: myKey Port Number: Soft11 The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service. Test Scheduler Settings Enable/Disable Scheduling for Database Connections Enable Northwind Set help configuring the Report Scheduler.	Scheduler Service	0	
Scheduler method:  Logi Scheduling Service Server Name Localhost Password: myKey Port Number: 56111 The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service. Test Scheduler Settings Enable/Disable Scheduling for Database Connections Enable Database Connections Set help configuring the Report Scheduler.	This dialog allows you permitted to schedule	u to select and configure the scheduling service e reports.	ce and determine the database connections that will b
Server Name localhost Password: myKey Port Number: 56111 The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service. Test Scheduler Settings Enable/Disable Scheduling for Database Connections Enable Database Connections Set help configuring the Report Scheduler.	Scheduler method:	Eogi Scheduling Service	O Windows
Password: myKey Port Number: 56111 The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service. Test Scheduler Settings Test Scheduler Settings Enable/Disable Scheduling for Database Connections Enable Database Connections Test Scheduler Settings Set help configuring the Report Scheduler	Server Name	localhost	
Port Number: 56111 The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service. Test Scheduler Settings Enable/Disable Scheduling for Database Connections Enable Database Connections Northwind Set help configuring the Report Scheduler	Password:	туКеу	
The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service.  Test Scheduler Settings  Enable/Disable Scheduling for Database Connections  Enable Database Connections  Northwind  Set help configuring the Report Scheduler	Port Number:	56111	
Northwind	The Server Name must Password and Port Nur	be the name of the server where the Logi Analyt mber must match the ones defined in the service.	ytics Scheduler Service is installed and running. The e. Test Scheduler Settings
Set help configuring the Report Scheduler	The Server Name must Password and Port Nur Enable/Disable Sched	be the name of the server where the Logi Analyt mber must match the ones defined in the service. duling for Database Connections	ytics Scheduler Service is installed and running. The  Test Scheduler Settings
et help configuring the Report Scheduler	The Server Name must Password and Port Nur Enable/Disable Sched	t be the name of the server where the Logi Analyt mber must match the ones defined in the service. duling for Database Connections e Databa Northwind	ytics Scheduler Service is installed and running. The Test Scheduler Settings base Connections
	The Server Name must Password and Port Nur Enable/Disable Schee Enable	t be the name of the server where the Logi Analyt mber must match the ones defined in the service. duling for Database Connections e Database Northwind	ytics Scheduler Service is installed and running. The Test Scheduler Settings base Connections

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



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

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

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

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

### Note:

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

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

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

## **Switching Between Schedulers**

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

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

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



## **Emailing Reports**

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

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

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

The Email Configuration dialog box will be displayed:



dialog allows you to identif each reporting database.	y an SMTP server	and configure access to it.	You can also configure the email r	notifications
ail Server Settings				
				*
				~
			Edit Email Server Set	tings
tabase Specific Settings	_			
Database	Email Me	essages Email Te	mplates	
Northwind				
	Subject:	~ReportName		
	To:	(Scheduled Report Subsc	riber)	
	From:			
	CC:			
	BCC:			
	Use the fol	llowing token where needed i	in the Subject template:	
	~Repo	ortName Will be rep	laced with report name.	
	•		Apply Cha	anges

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



Reports and certain alerts can be	sent to subscribers and selected
recipients via email once email h	as been configured.
SMTP Server:	localhost
SMTP Port:	25
Authentication Account:	
Authentication Password:	
Authentication Method	None 💌
Connection Timeout (seconds)	30
	Test SMTP Settings

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

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

SMTP Test	×	
Send Test Message From:	1	
Send Test Message To:		
Send Message		
	Close	





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

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

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

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

#### Note:

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

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

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

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

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

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

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

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



## Note:

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

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



## Archiving

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

The Configure Archive dialog box may be accessed by

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

The Configure Archiving dialog box will be displayed:

his p	age allows	you to configure the a	rchive format, folder and	virtual directory. You c	an also enable arch	iving <mark>f</mark> or each
	Enable	Database Northwind	Archive Report	HTML	•	
			Archive Folder:			Browse
			Archive Web Path			
			URL	Hint: Should look som "http://myserver/myar	nething like rchive"	
			Auto Archive:			du Channana
					Abt	ny changes



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

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

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

#### Note:

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

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

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

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

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

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

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

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



### Note:

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

#### Java -

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



## **Event Logging**

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

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

The Configure Event Logging dialog box may be accessed by:

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


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

	×
Configure Event Logging	
Information related to various events may be stored in a database. Typical events would include Login, Logout, and Ru Report.	'n
You must create a logging table in a database prior to configuring event logging. Scripts are available to create the logging table.	
This page allows you to identify the database containing the logging table, enable event logging, and select the events be logged.	to
Connection Logged Activities	_
Use any of the connection wizards below to create the connection string to access the database. You may also enter the connection string manually by clicking on the Edit Connection String button. If the logging table has been incorporated into an existing reporting database, click on the Pick a Connection button to set the connection string. Database Connection String:	
Connection Wizards Pick a Connection Edit Connection String	
MySQL Connection SQLServer Connection Oracle Connection PostgreSQL Connection	
Test	
Enable Activity Logging Note: Enabling or disabling logging works for new browser sessions.  Get help with Event Logging	
<u>O</u> K <u>C</u> anc	el

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

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



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

#### Java -

The available connection links may be different.

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

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

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



nforma Report.	tion related to various events may b	e stored in a database.	Typical events would include Login, Logout, a	nd Run
You mu logging	st create a logging table in a databa table.	se prior to configuring	event logging. Scripts are available to create t	he
This pag be logg Conn	ge allows you to identify the databa jed. ection Logged Activities	se containing the loggir	g table, enable event logging, and select the	events to
	Action	Log 🔺	Logged Information for Login	
►	Login		Action Name	
	Logout		Host IP Address	
	Create Report		Session Unique Identifier	
	Modify Report		Group Name	
	Delete Report		Application Code	
	Rename Report			
	Copy Report			
	Move Report			
	Schedule Report			
	Unschedule Report			
	Subscribe to Report			
* Clic	k on the title of "Log" column to sel nable Activity Logging Note:	ect/unselect all rows. Enabling or disabling log	ging works for new browser sessions.	

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

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

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



### Notes:

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

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

							Logge	d Inforr	nation						
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User- name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Login	*	•	1		*	1									
Logout	*	•	1		*	1								1	
Create Report	*	•	1	•	*	*		*	1	*	*	1			
Modify Report	*	1	*	1	•	1		1	1	1	1	1			
Delete Report	*	1	1	1	*	1		1	1	1	1				
Rename Report	1	1	1	1	*	1		1	1	1	1				
Copy Report	<b>\$</b>	~	~	\$	×	1		1	1	*	1				
Move Report	*	•	1		*	1		1	1	*	1				
Schedule Report	1	1	1	1	1	1		1	1	1	1				

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



							Logge	d Inforr	nation						
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User- name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Unschedule Report	1	1	*	1	*	1		1	1	1	1				
Subscribe to Report	1	1	*	1	*	1		1	1	1	1				
Unsubscribe from Report	1	*	*	1	*	1		1	1	1	1				
Batch Subscribe to Report	1	*	*	1	*	1	~	1	1	1	1				
Batch Unsubscribe from Report	1	1	*	1	*	1	•	1	1	1	1				
Run Report	1	*	*	1	*			1	1	1		1	~		
Create User	1	~	1	1	1	1									1
Modify User	1	1	*	1	1	1									1
Remove User	1	1	1	1	*	1									1
Create Role	1	*	*	1	*	1									1
Modify Role	1	*	*	*	*	1									1
Remove Role	1	*	*	*	*	1									1
Create User Group	1	1	1	1	1	1									1
Modify User Group	1	1	1	1	1	1									1
Remove User Group	1	1	1	1	1	1									1



							Logge	d Inforr	nation						
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User- name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Create Relationship	1	1	*	1	1	1		•							1
Modify Relationship	1	1	1	1	1	1		1							1
Remove Relationship	1	1	1	1	1	1		1							1
Create Permission	1	1	1	1	1	1									1
Modify Permission	1	1	1	1	1	1									1
Remove Permission	1	1	1	1	1	1									1
Create User- Defined Column	1	1	*	~	*	1		1							1
Modify User- Defined Column	~	~	~	1	1	1		~							1
Remove User- Defined Column	1	*	1	*	1	1		1							1
Create Virtual View	1	1	1	1	1	1		1							1
Modify Virtual View	1	1	1	1	1	1		1							1
Remove Virtual View	1	1	1	~	×	1		1							1
Create Cascading Filter	~	~	*	1	*	1		~							1
Modify Cascading Filter	1	1	*	~	*	1		1							1
Remove Cascading Filter	1	1	1	1	1	1		1							*



							Logge	d Inforn	nation						
Action	Action Name	Action Time stamp	Host IP Addr	Session Unique Id	User- name	Group Name	Affect User Name	Conn. String Label	Report File ID	Report Name	Report Type	Run Report	Action Durtn	Session Durtn	Affect
Create/Modify Session Parameter	*	1	*	1	•	1									1
Remove Session Parameter	*	*	1	*	1	*									1
Create/Modify Presentation Style	*	1	*	1	1	1									1
Remove Presentation Style	*	1	*	1	1	1									1
Modify Session Parameters for User Group	*	*	*	1	~	1		*							1
Modify Report Settings	1	*	1	1	1	1		1							1
Modify Application Settings	1	*	1	1	•	1									1
Create/Modify Data Format	•	•	•	1	1	1									1
Remove Data Format	1	•	1	•	1	•									1



# **Configure Reporting Databases**

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

Every reporting database *must* have:

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

Every reporting database *should* have:

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

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



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

Welcome		
Getting Started	Add, Remove, or Modify the Reporting Database(s) Connections	
Select or Create an Instance Instance Configuration	Import Schema Import object and column schema of the Reporting Database(s)	
Report Database Management Manage an Instance	Categorize Data Objects Group database objects in categories.	
Tools Resources	Import Relationships Import relationships of objects, as defined in the Reporting Databas	e(s)
About the Management Console	Import Procedures Import Stored Procedures, as defined in the Reporting Database(s)	
	Active Instance: C:\Program Files\12.1	Chang
ിത Ad Hoc	URL: <u>http://LGX025/12.1/</u>	Status



# **Report Database Connections**

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

	×
Report Databases	
The list below shows all the Report Database Connections defined in this metadata database. You can add new connections, or select any connection and edit or remove it.	
Report Database Connections	
Northwind Add	I
Edit	t
Remo	ve
Get help with Report Database Connection	
	Close

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

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

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



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

						х
Report Da	atabas	se Configuration	n			
Create a connection	to a databa	se used as a source of data for	r your reports.			
Enter a unique datab	ace label in	the text have like any of the co	opportion without held	w to create the conne	rtion string to	
access the database.	You may al	so enter the connection string	manually by clicking o	in the Edit Connection	String button.	
Once you have specif works before clicking	ied the con ) on the Ne	nection string, it is highly reco at button.	mmended that you clic	k on the Test button to	o verify that it	
Database Label:	New Rep	oort Database				
Database Connectio	n String					
Connection Wizard	ls	Command Timeout:	90	Edit Connection	String	
Oracle Connection						
MySQL Connection	on					
PostgreSQL Connect	tion					
					Test	
Get help with Report	Database (	Connection				
Manage				<u>о</u> к	<u>C</u> ancel	

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

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

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



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

### Java -

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

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

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

### Note:

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

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

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





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

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

### Removing a Reporting Database Connection

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

Report Databases	×
The list below shows all the Report Database Connections defined in this metadata database. You can ac connections, or select any connection and edit or remove it.	id new
Report Database Connections	
New Report	Add
	Edit
	Remove
Get help with Report Database Connection	
	Close

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







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

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

### **Connection Wizards**

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

### **OLEDB** Connection

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



Ę	) D	ata Link Properties	×
	Prov	vider Connection Advanced All	
	Se	elect the data you want to connect to:	
		OLE DB Provider(s)	
		Microsoft OLE DB Provider for Analysis Services 11.0	
		Microsoft OLE DB Provider for Analysis Services 12.0	
		Microsoft OLE DB Provider for Indexing Service Microsoft OLE DB Provider for ODBC Drivers	
		Microsoft OLE DB Provider for Search	
		Microsoft OLE DB Provider for SQL Server	
		Microsoft OLE DB Simple Provider	
		OLE DB Provider for Microsoft Directory Services	
		SQL Server Native Client 11.0	
		Next >>	
		OK Cancel H	elp

## Oracle Connection

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



Build C	Dracle Connection String	×
Server:		

Port:	1521		
User:			
Password:			
		<u>o</u> ĸ	<u>C</u> ancel

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

MySQL Connection

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

Build N	lySQL Connection String	×
Server:		
Database:		
Port:	3306	
User:		
Password:		
	<u>O</u> K <u>C</u> ancel	

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





PostgreSQL Connection

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

Build P	ostgreSQL Connection String	x
Server:		
Database:		
Port:		
User:		
Password:		
	<u>O</u> K <u>C</u> ancel	

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



## **Database Schema Wizard**

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

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

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

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

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

### Note:

If the following message is displayed:



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

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



## Import/Manage Objects and Columns

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

	Add Selected	Remove Sel	ected	Repair Selected	Clear Changes	
	Discount		Double	None		
	Quantity		SmallInt	None		
	UnitPrice		Currency	None		
	ProductID		Integer	None		
	OrderID		Integer	None		
	Column Name		Data Type	Column Chang	es	
lu	mns					-
	TABLE	Products		None		- N
	TABLE	Orders		None		
	TABLE	Order Details		None		
	VIEW	Invoices		None		
	TABLE	EmployeeTerrito	ries	None		
	TABLE	Employees		None		
	TABLE	Customers		None		
	TABLE	Categories		None		
	Object Type	Object Name		Object Change	s	



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

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

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

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

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

	_	_	_
Both	Source only	Different	Metadata database only

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

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

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

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

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

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



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

## Set User-friendly Object Names and Descriptions

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

he data objects are presente Object Name	ed. You may filter so that only certain data o	Options	Clear
Object Name	Licer friendly Name		
	Oser-menuly Name	Description	Hid
ories	Categories		
mers	Customers		
yees	Employees		
yeeTerritories	Employee Territories		
Details	Order Details		
	Orders		
cts	Products		
n	Region		
ers	Shippers		
iers	Suppliers		
ries	Territories		
	iyees yeeTerritories Details s cts n ers iers bries	ypeesEmployeesypeeTerritoriesEmployee TerritoriesDetailsOrder DetailssOrdersctsProductsnRegionersShippersiersSupplierspriesTerritories	yeesEmployeesEmployeesyeeTerritoriesEmployee TerritoriesImployee TerritoriesDetailsOrder DetailsImployee TerritoriessOrder DetailsImployee TerritoriessOrder DetailsImployee TerritoriessOrder DetailsImployee TerritoriessOrder DetailsImployee TerritoriessOrder DetailsImployee TerritoriesnRegionImployee TerritoriesersShippersImployee TerritoriesoriesTerritoriesImployee Territories





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

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

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

×
Auto-generate User-friendly nam
Please select your preferred method for
generating user-menory names:
Insert spaces at case change
Replace text at the beginning
Replace with
Replace with
Replace with
Replace text anywhere
Replace with
Replace with
Replace with
Use database names
<u>O</u> K Cancel

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

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



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

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

### Note:

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

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

## **User-friendly Column Names and Descriptions**

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



nitial	ly, the columns asso	ciated with all of the data object	ts are presented. You n	nay click on any da	ata object in t	he top pane
o dis	play only the colum	ns related to that data object.				
ouh	ave the option of ac	ding column descriptions and l	niding columns that wil	I not be directly us	ontions	ing.
Iten					opuons	Clear
	EmployeeTerritori Order Details	es				-
	Name	User-friendly Name	Description	Hide Colum	nn Object	Name
	CategoryID	Category ID		Г	Catego	ories
	CategoryName	Category Name		Г	Catego	ries
	Description	Description		Г	Catego	ries
	CustomerID	Customer ID		Г	Custon	ners
	CompanyName	Company Name		Г	Custon	ners
	ContactName	Contact Name		Г	Custon	ners
	ContactTitle	Contact Title		Г	Custon	ners
	Address	Address		Г	Custon	ners
1						

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



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

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

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

_		×
Auto-gener	ate User-frie	ndly nam
Please select generating u	your preferred method for ser-friendly names:	or
📕 Insert sp	aces at case change	
Replace	text at the beginning	
Replace	with	
Replace	with	
Replace	with	
Replace 1	text anywhere	
Replace	with	
Replace	with	
Replace	with	
Use data	base names	
	OK	Cancel

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

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

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



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

### Note:

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

Click **Options** to set the filter criteria.

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



# **Categorizing Data Objects**

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

The Categorize Data Objects dialog box may be launched by:

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

The following dialog box will be displayed:

ita objects may b sk. However, for c	e grouped into log latabases with a la	gical categories to a rge number of data	objects,	i users in selecting data for their reports. This is an optional categorizing the data objects is highly recommended.
ick on the Add bu	tton to create a ca	ategory.		
lect one or more assigned to mo	data objects and o re than one catego	irag them to a cate ry.	gory. Una	assigned data objects will display in red. Data objects can
ategories			Ava	ilable Objects
Add	Modify	Remove		Assigned 🔲 Unassigned
All Categories				Object Name
			•	Categories
				Customers
				Employees
				EmployeeTerritories
				Order Details
				Orders
				Products
				Region



### Note:

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

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

Three action buttons are displayed to manage the categories.

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

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

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

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

### Note:

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



# **Importing Relationships**

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

The Import Relationships dialog box may be launched:

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

The following dialog box will be displayed:



F	bage allows you to determ	nine which relationship	os will be available for report	ing.	
c	t the join type(s), highligh	t the relationships to	manage and click on one of t	the action buttons.	
si	trongly recommended the mentation for more inforr ner Join 🗌 Left Oute	at only one type of relanation on this topic. er Join 🗌 Right C	ationship be created between Outer Join	n two objects. Please consult the	
_	Primary Table	Join Type	Foreign Table	Relation Changes	
	Customers	Inner Join	Orders	None	Γ
	Employees	Inner Join	Orders	None	
	Shippers	Inner Join	Orders	None	ŧ.
	Categories	Inner Join	Products	None	
	Suppliers	Inner Join	Products	None	ē
	Orders	Inner Join	Order Details	None	k.
_	Products	Inner Join	Order Details	None	
	Region	Inner Join	Territories	None	Ē
_	Employees	Inner Join	EmployeeTerritories	None	
				· · ·	Γ
	Primary Column	For	eign Column	Change	-
	CustomerID	Cust	tomerID	None	
	Add Selected	Remove Selected	Repair Selected	Clear Changes	
	Both	Source only	Different	Metadata database only	_
he	elp with importing Relatio	onships			

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

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



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

Three action buttons are displayed in the dialog box:

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

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

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

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

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

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

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

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

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



- 3) Click Add Selected to set the action.
- 4) Click Next to display the Relationship Names and Descriptions dialog box:

u h	ave the option of mar	nually enter	ing descriptions for th	e relationships.	
er:					Options Clear
	Primary Table	Join Type	Foreign Table	User-friendly Name	Relation Description
	Customers	Inne	Orders		
	Employees	Inne	Orders		
	Shippers	Inne	Orders		
	Categories	Inne	Products		
	Suppliers	Inne	Products		
	Orders	Inne	Order Details		
	Products	Inne	Order Details		
	Region	Inne	Territories		
	Employees	Inne	EmployeeTerritories		
	Territories	Inne	EmployeeTerritories		
	Employees	Inne	Employees		
	Primary Column			Fore	ian Column
	CustomerID			CustomerID	
			(1 (1	1	

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



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

The following dialog box is displayed:

× Auto-generate Friendly names						
Please select your preferred method for generating friendly names:						
For left joins use:       Primary table Frien     ->     Foreign table Frien						
For inner joins use:       Primary table Frien     -     Foreign table Frien						
For right joins use:       Primary table Frien     <-						
<u>O</u> K Cancel						

The options in the drop-down lists are:

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

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

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



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

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

#### Notes:

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

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

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



# Management Console Tools

## **Report Management**

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

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

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

Re Use th and re	port Ma ne filters be abuild brok	enagement enout to include/exclude a class of reports en reports. Rebuilding broken reports n	s. It is recommende	d that you remove any orphaned reports ist way to repair them.
	Definitio	on only 🔳 Metadata only 🔳 B	roken 🔳 Prope	r
	Select	Report Name	Owner	Folder
۲.		Categories	Ad Hoc End User	Ad Hoc End User\
		Categories / Products	Ad Hoc End User	Ad Hoc End User\
		Crosstab	Admin	Admin\
		Customer Orders	Admin	Admin\
		Heat Map	Admin	Admin\
		Heatmap II	Admin	Shared\Marketing Reports\
		Product Summary	Admin	Shared\Marketing Reports\
D Rem	efinition o	nly (orphan) Metadata data	ibase only (orphan)	Broken Proper



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



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

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

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

### Using the Utility

The basic steps in using the utility are:

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

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

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

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


## **Filtering the Report List**

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



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



# **Publishing Managed Reports**

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

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

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

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

## Note:

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

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



## **Running the Publisher Wizard**

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

Publisher Wiza	ard	×
The Publisher Wizard allows t	the System Administrator to publish info reports into an Ad Hoc instance.	
The basic process is:		
1. Identify the Logi Info applic	ation that will be used as a source for the report definitions and other files the report requires to execute properly	
2. Select the reports to be pu	blished	
3. Select the associated depe	ndency files related to the reports	
4. If the dependency files already	ady exist in the Ad Hoc instance, confirm that they should be overwritten	
5. Map the connections used	in the report to connections in the Ad Hoc instance	
6. Review the summary report	t for the Publisher Wizard process	
Info Application Path:	Browse	
Get help with Publisher Wizard		
	Previous Next Cance	

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

Click Browse to identify a Logi Info application.

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

#### Note:

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





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

Select Reports Select the Reports that you would	d like to imp	iort.		X View Error
⊡. Root		Select	Report Name	
NatExamples	▶		Analysis Chart	
		Г	AnalysisGrid	
		Г	Default	
		Г	DevMaster	
		Г	InputSelectionPoint	
		Г	MyMasterReport1	
		Г	MyMasterReport3	
		Г	MyMasterReport4	
		Г	Chart.22448-23519-RevStackYAxis-FontItalic	
		Г	OLAPGridExample	•
	4			•
Get help with Publisher Wizard			Previous	<u>N</u> ext <u>C</u> ancel

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

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

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





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

Se The	elect Files following is a list	of all definition and support files that are needed by the selected reports :	to run properly. Yc	ou can choose to no	X ot copy a file.
	Select	Report Name		Туре	
Þ		\_Definitions\_Reports\AnalysisChart.lgx		Report	
	~	\_SupportFiles\NW_Orders.xml		DataXML	
	~	\_Definitions\_Reports\AnalysisGrid.lgx		Report	
		\_Definitions\_Reports\Default.lgx		Report	
	~	\_Definitions\_Reports\DevNetMaster.Igx		Report	
	~	\_Definitions\_Reports\InputSelectionPoint.Igx		Report	
	~	\_Definitions\_Reports\MyMasterReport1.lgx		Report	
	~	\_Definitions\_Reports\OLAPGridExample.lgx		Report	
<u>Get h</u>	elp with Publisher	Wizard			
			Previous	Next	<u>C</u> ancel

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

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

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



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

Overwrite	Panart Nama	Time
Overwrite	\ Definitions\ Reports\ahReport1.lgx	Report
Г	\ Images\page first en.gif	Image
Г	\ Images\page last_en.gif	Image
Г	Consider the second secon	
Г	\_Images\page_prev_en.gif Image	
Г	\StyleSheets\Light.css StyleSheet	
Г	\_Images\collapse_blue.jpg	Image
Г	\_Images\expand_blue.jpg	Image
Г	\_Definitions\_Reports\ahStdFavoriteReports.lgx	Report
Г	\_StyleSheets\ahStdReport.css	StyleSheet
Г	\_Definitions\_Reports\ahStdFrequentViewed.lgx	Report
Г	\_Definitions\_Reports\ahStdRecentViewed.lgx	Report

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

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

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

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



Connection ID	Info Connection Element
connAdventureWorks	Connection ID="connNWLocal" SqlServer="(local)\SQLEXPRESS" SqlServerDatabase="northwind" SqlServerPassword="12341234" SqlServerUser="saLogi" Type="SqlServer"> <metadata <br="" id="metaNW">MetadataName="Northwind DB" /&gt;           Matching Ad Hoc Connection:         New Report Database           Ad Hoc Connection:         New Report Database</metadata>
	Copy the connection as is     Use an existing connection
	Connection: New Report Database
	<connection <br="" ahdbtype="SQLSERVER" commandtimeout="90" id="1" label="New Report&lt;br&gt;Database" type="SqlServer">SqlServerUser="saLogi" SqlServerPassword="12341234" SqlServerDatabase="Northwind" SqlServer="(local)\SQLEXPRESS" /&gt;</connection>

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

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

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

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



## Note:

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

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

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

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

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

#### Notes:

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

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

Published reports cannot be modified in Ad Hoc.

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

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



## **Instance Synchronization**

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

Here's an overview of the synchronization process:

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

#### Note:

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

## **Creating a Synchronization Package**

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



	x
Instance Synchronization	
Metadata Database Synchronization Packages are XML-based files that can be created based on one instance of Ad Hoc metadata and used to synchronize other instances of Ad Hoc with the master instance.	
Select an action:	
Create or Manage Synchronization Packages	
Run an existing Synchronization Package	
<u>Get help with Synchronization</u> <u>O</u> K <u>Close</u>	

#### Note:

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

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



		x
Ма	nage Synchronization Package	
Metad based Hoc wi	ata Database Synchronization Packages are XML-based files that car on one instance of Ad Hoc metadata and used to synchronize other th the master instance.	be created instances of Ad
Path:	C:\Program Files\12.1\Database\	Browse
Metad	ata Database Synchronization Packages:	
New	Package	Add
		Modify
		Remove
Get he	Ip with Synchronization	Close

The typical process for creating a synchronization package is:

- 1) Identify the synchronization package file name.
- Select items from the current active instance and active reporting database connection to be synchronized in the Package Definition dialog box, using either the "Simple" or "Advanced" view and click Next.
- Review the Package Definition. Items are categorized and presented in a tree structure. Synchronized categories of items are listed alphabetically and each category of item can be expanded to review the individual items. Options requested for any level of the tree are shown in parenthesis.
- 4) Make any adjustments necessary to achieve the desired result by clicking **Previous.**
- 5) Save the synchronization package file by clicking **Save.**
- 6) The creation of a synchronization package can be terminated at any time by clicking **Cancel.**



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

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

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

To create a new synchronization package, click Add.

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

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

Click Close to dismiss the Manage Synchronization Packages dialog box.

#### Hint:

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



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

Package De	efinition	×
Package Name	Documentation Example	
Select Items to Cop	y Advanced view	
Data Objects Reports / Das	<u>hboards</u>	
Get help with Synchron	nization <u>Previous</u> <u>N</u> ext <u>Cancel</u>	

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

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

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





Package Name Documentation Example	
elect Items to Copy Simple view	
Application Items Settings	Northwind Database Connection
Permissions	Data Objects
Presentation Styles	Fixed Parameters
Data Formats	Relationships
Session Parameters	Cascading Filters
Roles	
Default Organization	Content Items
Organization Session Parameters	Eolders
Users	Reports / Dashboards

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

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

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



## Note:

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

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

Package Name Documentation Example	
Select Items to Copy Simple view	
Application Items Settings	Northwind Database Connection
Permissions	Data Objects
Presentation Styles	Fixed Parameters
Data Formats	Relationships
Session Parameters	Cascading Filters
Roles	
Default Organization	Content Items
Organization Session Parameters	Folders
Users	Reports / Dashboards

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

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

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



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

Individual frame controls are described below:

## Application Items

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



Customize F	eatures - Settings	×
Reporting Database:	Northwind	•
Organization: Note: All checked settin applied if any needed settin	Default gs below will be copied to the target instance in overwrite mode and they only get ervice or configuration is already in place and can be verified. String	-
Copy General settin Copy UI Features	ngs Copy Scheduling configuration for this database	
Copy Reporting Fe	atures Copy Email configuration for this database	
Copy Security Setti	ings Copy Archiving configuration for this database Copy Logging configuration	
Multiple Organizat     Unique Report/Fol	ions ? der name ?	
Get help with Synchroniza	ation <u>O</u> K <u>C</u> ar	ncel

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

#### Note:

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

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



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

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

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

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

Select	remission Name	Description
	System Administration	Allows every right in the application
	End User	View create modify rename and delete personal r
	Manage My Personal Reports	Allows view, create, change, rename, and delete pe
Г	View My Personal Reports	Allows viewing of personal reports. Copy is allowe
Г	Manage Shared Reports	Allows view, create, change, rename, and delete sh
Г	View Shared Reports	Allows viewing of shared reports. Copy is allowed t
Г	Manage All Personal Reports	Allows view, create, change, rename, and delete all
Г	Schedule and Archive Reports	Allows scheduling and archiving of any reports tha
Г	Access Configuration Area	Allows access to the configuration menu and its u
Г	Administer Organization	Allow admin rights in report management area plu
Г	Power End User	View, create, modify, rename and delete personal r
		·
		F       End User         Manage My Personal Reports         View My Personal Reports         Manage Shared Reports         View Shared Reports         Manage All Personal Reports         Schedule and Archive Reports         Access Configuration Area         Administer Organization         Power End User

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



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

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

		Overwrite existing Styles
 Select	Class Name	Friendly Name
	bold	Bold
	green	Green
	red	Red
	AlignLeft	Align Text Left
	AlignCenter	Align Text Center
	AlignRight	Align Text Right
	imageAlignLeft	Align Image Left
	imageAlignCenter	Align Image Center
	imageAlignRight	Align Image Right
	BlackTextYellowBackground	Black Text Yellow Background
	WhiteTextGreenBackground	White Text Green Background

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

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



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

				,
	Select	Format Name	Format	
▶		General Number	General Number	
	Г	Currency	Currency	
	Г	Integer	#0	_
	Г	Fixed	Fixed	-
	Г	Standard	Standard	-
	Г	Percent	Percent	-
	Г	Scientific	Scientific	
	Г	2-digit place holder	2-digit place holder	
	Г	3-digit place holder	3-digit place holder	-
	Г	General Date	General Date	-
	Г	Long Date	Long Date	-
	Г	Medium Date	Medium Date	-
•		1	· · · · · · · · · · · · · · · · · · ·	$\square$

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

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





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

Cus	stomiz	ze Features - Sessior	n Parameters	×
			Overwrite existing Session Parameter	'S
	Select	Parameter Name	Default Value	
•		spCountry	Brazil	
		spDepts	HR1APIDevIQA	
<u>Get hel</u>	p with Sync	hronization	<u>O</u> K <u>C</u> a	incel

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

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





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

Cus	tomiz	ze Features - Roles		×
			Overwrite existing Roles	
			Overwrite existing dependent items	?
	Select	Role Name	Description	
•		System Admin		
<u>Get help</u>	o with Synd	chronization	<u>O</u> K <u>C</u> ar	icel

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

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

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





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

## Selected Organization

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

Cus	tomiz	ze Features - C	organization Se	ession F	arameters	×
Parent (	Organizati	on: Default	<ul><li>Overwri</li><li>Overwri</li></ul>	ite existing Se ite existing de	ssion Parameters pendent items	?
	Select	Parameter Name	Default Value	Follo	Parameter Value	
•		spCountry	Brazil	Yes		
	Г	spDepts	HRIIAPIIDevIIQA	Yes		
1						Þ
Get help	with Sync	hronization			<u>O</u> K <u>C</u> anc	el

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

![](_page_131_Picture_1.jpeg)

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

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

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

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

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

Cust	tomiz	ze Features - Us	ers			х
Parent C	Organizati	on: Default		0 []	verwrite existing Users	
Roles Or Do	nly assign on't assign	existing any		🗌 Ir 🗌 Ir	nclude Session Parameters nclude Profile information	
	Select	Username	First Name		Last Name	
•		Admin	Administrator			
<u>Get help</u>	with Sync	hronization			OK <u>C</u> ancel	

![](_page_132_Picture_0.jpeg)

![](_page_132_Picture_1.jpeg)

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

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

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

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

## Selected Database Connection

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

Cu	stomiz	ze Features - Categorie	x S
Paren	t Connectio	n: Northwind	Overwrite existing Categories
	Select	Catego	y Name
•		Primary Data Objects	
<u>Get he</u>	Ip with Sync	hronization	<u>O</u> K <u>C</u> ancel

![](_page_133_Picture_1.jpeg)

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

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

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

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

arent	Connection:	Northwind		Overwri	te existing Objects Jnmatched Columr	ıs
_ Ind	clude Links clude Access	Rights		Category Same a None	assignment as source or none	
	Select	Object Name	Туре	Categories	Hidden	4
•		Categories	Table		No	
	Г	Customers	Table	Primary Data Ob	No	
	Г	Employees	Table	Primary Data Ob	No	
	Г	EmployeeTerritories	Table		No	
	Г	Order Details	Table		No	
	Г	Orders	Table	Primary Data Ob	No	
	Г	Products	Table		No	
	Г	Region	Table		No	
	Г	Shipperc	Table		No	

![](_page_134_Picture_1.jpeg)

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

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

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

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

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

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

Cus	stomiz	ze Features - Fi	xed Parameters	×
Parent (	Connection	Northwind	Overwrite existing Fixed Parameters	
	Select	Object Name	Phrase	
		Customers	Customer ID Starts with G Or Customer ID Starts with F	
Get hel;	p with Sync	hronization	<u>O</u> K <u>C</u> ancel	

![](_page_135_Picture_1.jpeg)

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

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

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

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

arent	Connection	: Northwind	Overv Overv Overv	write existing Relation write existing depend	nships lent items
	Select	Relation Name	Main Object	Relation	Joined C
•		Categories - Products	Categories	Inner Join	Products
	Г	Customers - Orders	Customers	Inner Join	Orders
	Г	Employees - Orders	Employees	Inner Join	Orders
	Г	Employees - Employee Ter	Employees	Inner Join	EmployeeTerr
	Г	Employees - Employees	Employees	Inner Join	Employees
	Г	Orders - Order Details	Orders	Inner Join	Order Details
	Г	Products - Order Details	Products	Inner Join	Order Details
	Г	Region - Territories	Region	Inner Join	Territories
	Г	Shippers - Orders	Shippers	Inner Join	Orders
	Г	Suppliers - Products	Suppliers	Inner Join	Products
•		T	T:1:	T	F 1 T

![](_page_136_Picture_1.jpeg)

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

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

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

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

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

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

arent	Connection:	Northwind	Ove Ove	rwrite existing Cascadin rwrite existing depende	ng Filters
	Select	Filter Name	Object Name	Column Name	
•		City	Customers	City	]

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

![](_page_137_Picture_1.jpeg)

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

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

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

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

## Content Items

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

Clicking the Folders link will display the following dialog box:

CUS Parer Parent	tomiz nt Connecti Organizati	ce Features -	- Folde	ers	Overwrit	e existing	Folders
Incl	ude Acces	s Rights	Owner assign Same as s Admin	nment source or Admin	Folder assign Same as so Root	ment ource or i	root
	Select	Folder Name		Folder Pa	th	Туре	Owner
•		HR Reports				Perso	Admin
		Management Reports				Perso	Admin
Set help	with Sync	hronization			<u>о</u> к		<u>C</u> ancel

![](_page_138_Picture_1.jpeg)

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

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

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

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

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

Parent Connection: Northwind Parent Organization: Default				Overwrite existing dependent items			
Inc	lude Schee Include S	dules ubscriptions	Owner assign	nment source or Admin	Folder assign     Same as s     Root	ource or r	oot
	Select	Report Nar	ne	Folder Pa	th	Туре	Owner
•		Categories				Perso	Ad Ho
	Г	Categories / Produ	tts			Perso	Ad Ho
	Г	Crosstab				Perso	Admin
	Г	Heat Map				Perso	Admin
	Г	Product Summary		Marketing Reports\ S	Shared	Admin	
	Г	Heatmap II		Marketing Reports\		Shared	Admin

![](_page_139_Picture_1.jpeg)

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

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

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

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

#### Package Definition - Preview

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

Package D	efinition			×	
Package Name	Documentation Example				
Please preview the it If you would like to r	ems that will be handled through this package, below. make changes to the package use the Previous button.				
Reports / Dashboards (Owner, Folder)     Settings (Reporting Database: Northwind, Organization: Default)					
Get help with Synchro	onization_	<u>P</u> revious	<u>S</u> ave	Cancel	

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

![](_page_140_Picture_1.jpeg)

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

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

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

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

## Applying a Synchronization Package to a Target Instance

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

Instance Synchronization	×			
Metadata Database Synchronization Packages are XML-based files that can be created based on one instance of Ad Hoc metadata and used to synchronize other instances of Ad Hoc with the master instance.				
Select an action:				
Create or Manage Synchronization Packages				
Run an existing Synchronization Package				
<u>Get help with Synchronization</u> <u>O</u> K <u>Close</u>				

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

![](_page_141_Picture_0.jpeg)

		х
Run Synchronization Package		
Determine which synchronization package you want to synchronize the database wit package, select the package file, select the option to create a log and/or update the click Run.	h. To run a database and	
Path: C:\Program Files\12.1\Database\	Browse	
Metadata Database Synchronization Packages:		
Application LIBL: http://LGY025/12.1/		
Hint: Should look something like "http://mvServer/mvVirtualDirectory"		
NOTE: The Application URL is needed to associate report schedules in the package t application.	o the	
Reporting Database Organization		1
Northwind Default	•	
Overwrite the connection Overwrite the organization		
Run	Close	

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

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

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

![](_page_142_Picture_0.jpeg)

![](_page_142_Picture_1.jpeg)

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

To apply a synchronization package:

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

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

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

#### Note:

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

#### Hint:

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

![](_page_143_Picture_0.jpeg)

## **Diagnostic Scan**

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

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

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

Logi Ad Hoc Reporting - Diagnostic Tool	×
Select scan areas	
Choose the areas that you want to scan. You can check or uncheck all areas using the Select/Unselect All buttons.	
File System	
IIS Settings	
Settings	
Metadata Database	
Log Database	
Select All Unselect All	
Modify your application profile	
< <u>B</u> ack <u>N</u> ext >	<u>F</u> inish

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

• File System – Looks for the expected folders and files.


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

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

*Java -*The IIS option will not be enabled.

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

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



Application Pro	ofile			×
So that we may provide you b will assist us in more quickly o	etter support, we'd like to gather ; liagnosing and responding to a po	your Logi Ad Hoc ossible future Sup	Reporting application profile. This info port inquiry.	rmation
Company Name:				
<ol> <li>Do you utilize a Developm</li> <li>Yes</li> <li>No</li> </ol>	ent/Staging environment before u	upgrading to a ne	wer version?	
2. What database standard a	nd version is your source data sto	red in (e.g., SQL S	erver 2005, Oracle 10g, etc.)?	
3. What browser application Browser Type: Micr	and version do you primarily use osoft Internet Explorer	(e.g., MS-IE, Mozil Version:	la Firefox, etc.)?	
4. What is your primary brow	ser language and region setting (	e.g., en-US, en-GB	,etc.)?	
5. Is the application embedde	ed or integrated in another web ap	oplication?		
⊖ Yes				
• NO			ОК	Cancel

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

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

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



Logi Ad Hoc Reporting - Diagnostic Tool	×
Scan progress and results	
Scan started at: 6/24/2016 4:02:47 PM	<b>^</b>
Application Path: C:/Program Files/12.1.048/ Company Name: ACME Application Version: 12.1.048 Operating System: Microsoft Windows NT 10.0.10586.0 Development/Staging: No Source Database: SQL Server 2014 Browser: Microsoft Internet Explorer 10 Browser Language Settings: en-US Integrated Application: No Scan area: File System Scan Results: File System scan finished with 0 errors and 0 warnings.	
Scan area: IIS Settings Website: Default Web Site	•
100% complete	
	Cancel
< <u>B</u> ack <u>N</u> ext >	<u>F</u> inish

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





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

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



# Cleanup

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

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

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

his utility will help you manage disk space by cleaning up archives, ter	mporary files, and backup files. It may also be run from the command
ine. For additional documentation, see the Cleanup Utility Usage Guid	e.
Archives Select "Remove Old Archives" to remove any archives that were created before the specified date. Select "Optimize Old Archives" to remove unnecessary files from a archive folder. This option will only affect archives created before Version 9. Archive File System Folder:	Report Backups Report Backups are created when a report is deleted for any reason. Select this option to remove backups older than the specified date. Remove Report Backups
Remove Old Archives     Older than:     Days or     June 16, 2016	Older than:
Temporary files Temporary files are created during runtime to handle large data sets and exports. These files are saved in rdDownload and rdDataCache folder of the application. Select this option to remove the files that were created before the specified number of hours. Remove Temporary Files	Configuration Backups Configuration Backups are created when report database schema is changed using the Schema Wizard or Relationship Wizard. Select this option to remove backups that were created before the specified date. Remove Configuration Backups Older than:



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

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

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

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

### Note:

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



# Internationalization

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

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

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

*Java -*Internationalization is not an available action.

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

\*.[language code].resx

Where:

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

### Note:

The original and internationalized resource files are stored in the application's App\_GlobalResources and App\_LocalResources folders and in App\_LocalResources subfolders found in other folders in the application.



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

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

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

### Note:

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



#### **Overview of the Resource Manager**

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

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

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

#### Note:

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

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

• Create or manage central resource files

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

• Create or manage resource files for the active instance

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



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

• Publish central resources into an instance

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

• Import resources from an instance

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

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

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



### Using the Resource Manager

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

Resource Manager	×
The Resource Manager allows the System Administrator to create and manage the resource files used to internationalize Logi Ad Hoc Reporting instances.	
The basic process is:	
1. Choose the action that you would like to perform.	
2. Specify/Select a Language Code (e.g., ko-KR, it-CH, fr).	
Note: In the case of resource creation actions, if resource files for a particular Language Code do not exist, simply key in the code to generate them. Otherwise select the existing code from the drop-down.	
3. Follow the guidelines provided by the wizard.	
Select an action:	
Create or manage central resource files	
<ul> <li>Create or manage resource files for the active instance</li> </ul>	
O Publish central resources into an instance	
<ul> <li>Import resources from an instance</li> </ul>	
Language Code: Example: ko-KR	
Get help with Resource Manager	
Previous <u>N</u> ext <u>C</u> ancel	

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

## Create or manage central resource files option

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



Re	esource File	e Editor				×
The tre review	ee reflects the folder s and edit all of the re	tructure related to the resource files. Eithe source files in the node.	r navigate the tree to a specific resource	e file or select a node	in the tree to	
🔳 N	lon-Translated	Translated 🔳 Changed	Filter:	Options	Clear	
<ul> <li>⇒</li> <li>⇒</li></ul>	Resources ahConfiguration ahControls ahReport ahWizard App_GlobalResources	es ;				
	Name	Original Value	Translated Value	Comment	File Name	
۶.	AdHocSearch.Title	Find Styles	1		ahConfig	1
	BoundFieldReso	Class Name			ahConfig	1
	BoundFieldReso	Friendly Name			ahConfig	
	btnFV3Resource	Pick Class from Style Sheet			ahConfig	
	btnFV3Resource	Pick Class from Style Sheet			ahConfig	
	btnNewAppeara	Add Style			ahConfig	
	btnNewAppeara	Click to create a new style.			ahConfig	
	btnRemoveAppe	Delete Styles			ahConfig	-
Get he	New or unsaved Tr	anslated Value Saved Tran	slated Value Original Valu	e changed by upgrad	2	
			Previous	Finish	Cance	1

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

## Locating the desired resource file:

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



## Notes:

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

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

### Specifying a Translated Value:

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

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

# Create or manage resource files for the active instance option

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



Resource File	e Editor					×
The tree reflects the folder review and edit all of the re	structure related to the resource files. Eithe source files in the node.	r navigate the tree to a sp	ecific resource file	or select a node in	the tree to	
Non-Translated	Translated 🔳 Changed	Filter:		Options	Clear	
-11.2.46  -ahConfiguration -ahControls -ahReport -ahWizard -App_GlobalResource -App_LocalResource	es s					
Name	Original Value	Translated Value		Comment	File Name	
AdHocSearch.Title	Find Styles				ahConfig	
BoundFieldReso	Class Name				ahConfig	
BoundFieldReso	Friendly Name				ahConfig	
btnFV3Resource	Pick Class from Style Sheet				ahConfig	
btnFV3Resource	Pick Class from Style Sheet				ahConfig	
btnNewAppeara	Add Style				ahConfig	
btnNewAppeara	Click to create a new style.				ahConfig	
btnRemoveAppe	Delete Styles				ahConfig	-
New or unsaved Tr Get help with Resource File	ranslated Value Saved Tran	islated Value	Original Value ch	anged by upgrade	-	
			Previous	<u>F</u> inish	<u>C</u> ance	I

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

# Publish central resources into an instance option

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



Resource	File Publisher			×
The Resource File P Select the language	ublisher copies language specific resource files from the Management Cor	nsole to the selected	Logi Ad Hoc Repo	rting instance.
Either select the tar	rget instance Application Path from the dropdown list or use the Browse b	utton to identify the t	target instance.	
Language Code:	en-GB			
Application Path:	C:\Program Files\11.2.46		Browse.	
Get help with Resou	rce File Publisher			
		Previous	Finish	Cancel

Select the Language Code from the dropdown list.

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

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

### Import resources from an instance option

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



Resource File Importer	×
The Resource File Importer copies language specific resource files from the selected Logi Ad Hoc Reporting instance into the Management Console folder.	
Either select the source instance Application Path from the dropdown list or use the Browse button to identify the source instance.	
Select the language code from the dropdown list.	
Note: If language specific resource files already exist in the Management Console, you will be prompted to confirm that the existing files should be overwritten. Once the file are overwritten, the changes are permanent and can't be undone.	2
Application Path: C:\Program Files\12.1.048    Browse	
Language Code: en-GB	
Get help with Resource File Importer	
<u>P</u> revious <u>F</u> inish <u>C</u> ancel	

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

Select the Language Code from the dropdown list.

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

#### Working with "Tokens" in a Phrase:

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

Access Rights for "sales" table

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



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

Access Rights for "@Replace1~" table

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

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

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

Diritti d'accesso per tabella "@Replace1~"

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

@Replace1~ or @Replace2~, etc.

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

#### What to expect when Logi Ad Hoc Reporting is upgraded:

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

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

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



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

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

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

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

*Note: Some familiar keyboard combinations work in Resource Manager. These are: Ctrl + c: Copy* 

Ctrl + v: Paste

Ctrl + z: Undo of the last action

### **Filtering Resources**

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



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



Re	esource File	e Editor						×
The tre review	e reflects the folder s and edit all of the res	tructure related to the resource files. Eithe source files in the node.	r navigate	the tree to a sp	ecific resource file	e or select a node i	n the tree to	
🔳 N	on-Translated	Translated 🔳 Changed	Filter:	find		Options	Clear	
⇒ ahi ÷ ÷ ÷ ÷ ÷	Resources ahConfiguration ahControls ahReport ahWizard App_GlobalResources App_LocalResources	es ;						
	Name	Original Value	Translat	ed Value		Comment	File Name	-
•	AdHocSearch.Title	Find Styles					ahConfig	
	cvShowFilterRes	Find Filter rows value is required.					ahConfig	$\square$
	AdHocSearch.Title	Find Filters					ahConfig	
	AdHocSearch.Title	Find Filters					ahConfig	
	AdHocSearch.Title	Find Catalogs					ahConfig	
	AdHocSearch.Title	Find Categories					ahConfig	
	AdHocSearch.Title	Find Data Formats					ahConfig	
	btnFindParamRe	Find Request Parameter					ahConfig	-
Get he	New or unsaved Tr	anslated Value Saved Tran	slated Va	lue	Original Value cl	hanged by upgrade	2	
					Previous	<u>F</u> inish	Cance	1

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

×
Search Filter Options
Search in Columns
Original Value
Translated Value
Options
<ul> <li>Equal to</li> </ul>
<ul> <li>Contains</li> </ul>
<ul> <li>Starts with</li> </ul>
Ends with
OK Cancel



# **Additional Resources**

# **Welcome Page**

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

This page may be revisited by click Welcome action group.





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

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

#### Notes:

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

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



# **Getting Started**

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

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

Meleses		
weicome	Overview of the Management Console	
Getting Started	Review an overview of the Management Console	
Select or Vreate an Instance	Configuration Wizard	
Instance Configuration	Run a wizard that will walk you through the optimal steps to con	figure an instar
Report Database Management	of Ad Hoc	
Manage an Instance	Link to online documentation tailored for new users	
Tools		
Resources		
About the Management Console		
	Active Instance: C:\inetpub\wwwroot\AH12_Test	Change Status
ിത Ad Hoc	Active Connection: New Penert Database	Change



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

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

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

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



# Resources

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

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

Welcome	Online Documentation	
Getting Started	Review the latest online documentation at www.logianalytics.com/Ad Hoc/Documentation	
Select or Create an Instance Instance Configuration	Support Connect to the Logi Analytics Support portal	
Report Database Management		
Manage an Instance		
Tools		
	Active Instance: C:\inetpub\wwwroot\AH12_Test	<u>Change</u>
	UKE: <u>http://LUGICLASSKWPC1/AF12_Test/</u>	Status



# About the Management Console

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

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

Welcome	Version Show the Ad Hoc and Engine version of the Management Console	
Getting Started	show the Ad Hoe and Engine version of the Management console	
Select or Create an Instance	Release Notes	
Instance Configuration	Link to the Release Notes for this version of Ad Hoc	
Report Database Management		
Manage an Instance		
Tools		
10015		
Resources		
About the Management Console		
	Artice Instance: Chineteubhumment AU12 Test	Char
	URL: http://LOGICLASSRMPC1/AH12_Test/	Statu
		a carea.



# Managing the Management Console

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

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

# Repair

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



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



# Remove

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

#### Note:

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



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



Click **Remove** to continue the process.



# Modify

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



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



😸 Logi Ad Hoc Reporting 12.1 - InstallShield Wizard	<b>•</b>
<b>Custom Setup</b> Select the program features you want installed.	=
Click on an icon in the list below to change how a feature is in	nstalled. Feature Description
LogiAnalytics Ad Hoc Report Builder	This feature requires 0KB on your hard drive.
InstallShield	Next > Cancel

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

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



🛃 Logi Ad Hoc Reporting 12.1 - InstallShield Wizard
Ready to Modify the Program 🛑
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
< Back Install Cancel

Click Install to install the Logi Ad Hoc Scheduler Service.

#### Note:

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



# **CONTACT US**

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

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