

Logi Ad Hoc Reporting Web Management Console Guide



Version 11
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Introduction

This guide is intended for administrators interested in managing Ad Hoc Java instances through a web interface. The Web Management Console, referred to as webMC in this document, provides a limited subset of the management functions available through the traditional desktop Ad Hoc Management Console application.

See the Logi Ad Hoc Management Console Usage Guide for additional background on the configuration of an Ad Hoc instance from the Management Console.

The webMC allows the administrator to:

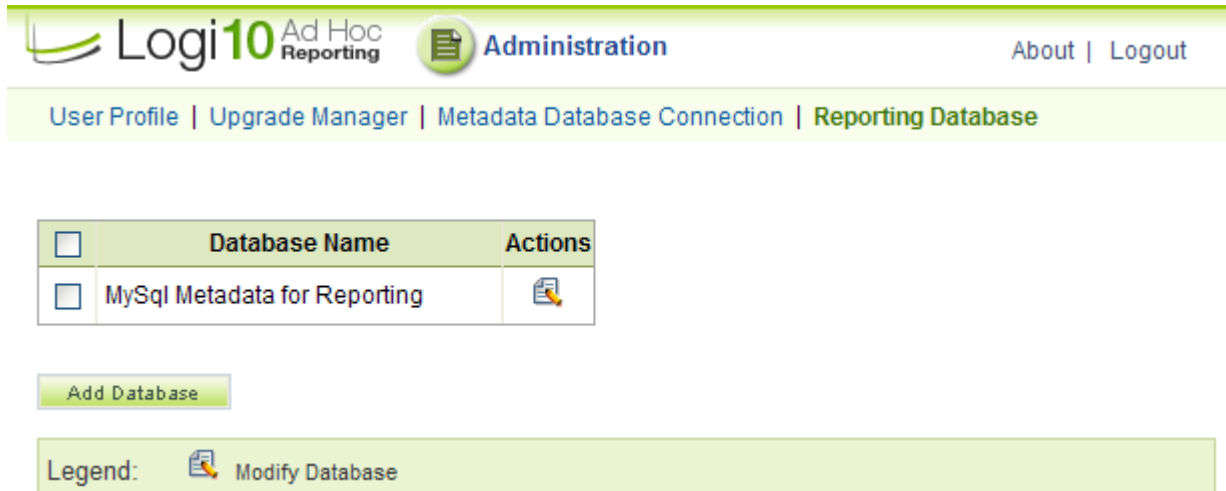
- Set the password for the “superadmin” user
- Upgrade the metadata database, reports, and rights
- Set the metadata database connection
- Create and manage reporting connections and associated metadata


The webMC specifically **does not** allow the administrator to:

- Create a new Ad Hoc instance
- Upgrade the instance application folders, predominantly the /bin folder
- Affect non-Java based Ad Hoc instances


To access the webMC, browse to the Ad Hoc Java instance and login with the user “superadmin” and the password “password”.

The following page will be presented: *** missing logo



<input type="checkbox"/>	Database Name	Actions
<input type="checkbox"/>	MySql Metadata for Reporting	

Add Database

Legend:  Modify Database

This guide is organized according to the four configuration choices presented:

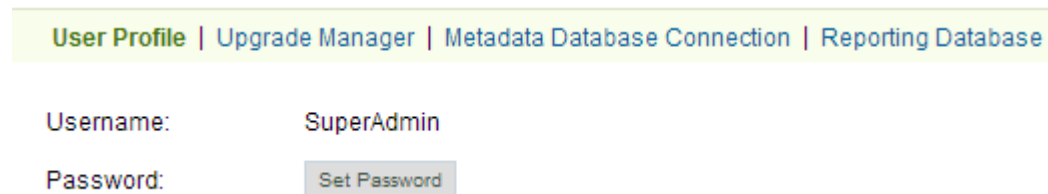
- User Profile
- Upgrade Manager
- Metadata Database Connection
- Reporting Database

Functional Categories

User Profile

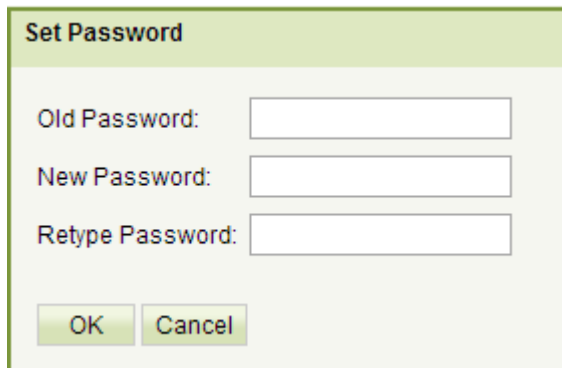
The **User Profile** option allows the administrator to reset the password for the “superadmin” user. The default password is “password”. For obvious security reasons, It is recommended that the default password is changed.

Click on the **User Profile** link to display the following page:



The screenshot shows a navigation bar with four links: **User Profile** (highlighted in green), [Upgrade Manager](#), [Metadata Database Connection](#), and [Reporting Database](#). Below the navigation bar, the **Username:** is displayed as **SuperAdmin**. The **Password:** field is empty, and there is a **Set Password** button next to it.

To change the password, click on the Set Password button. The following dialog will be displayed:



The screenshot shows a dialog box titled **Set Password**. It contains three text input fields: **Old Password:**, **New Password:**, and **Retype Password:**. At the bottom of the dialog, there are two buttons: **OK** and **Cancel**.

Enter the *Old Password*, *New Password* and *Retype Password* in the text boxes.

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

Click on the **Cancel** button to retain the original password.

Upgrade Manager

The Upgrade Manager allows the administrator to upgrade the metadata database, reports and rights for the Ad Hoc Java instance.

Click on the **Upgrade Manager** link and the webMC will present a page that either displays the current status of the instance or leads the administrator through the upgrade process.

[User Profile](#) | [Upgrade Manager](#) | [Metadata Database Connection](#) | [Reporting Database](#)

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

Metadata Database:

Current Version:	11.2.59
Target Version	10.0.0 or newer

Metadata database is up-to-date.

Update Metadata

Reports:

Current Version:	11.2.59
Target Version	10.0.9 or newer

Reports are up-to-date.

Update Reports

Rights:

Rights are up-to-date.

Update Rights

For the areas that are already up-to-date, the associated update buttons are disabled.

If the *Current Version* is “unknown” or prior to the *Target Version*, the metadata database needs to be updated. Click on the **Update Metadata** button to perform the update.

Click on the **Update Reports** button and a dialog displaying the affected reports will appear. The reports that require upgrading are highlighted.

<input type="checkbox"/>	Report Name	Owner	Folder
<input checked="" type="checkbox"/>	Objects Table	Admin	Admin\
<input checked="" type="checkbox"/>	Columns Table	Admin	Admin\

OK Cancel

Click on the **OK** button to upgrade the selected reports.

Click on the **Update Rights** button to make the missing rights available in the Ad Hoc instance.

Metadata Database Connection

Before establishing an instance of Ad Hoc, the System Administrator must determine the best repository for the Ad Hoc metadata. For Ad Hoc Java instances the database options for storing the metadata are Oracle and MySQL.

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

Once the metadata database has been established, the **Metadata Database Connection** link may be used to establish a connection to the database.

Click on the **Metadata Database Connection** link to display the following page:

User Profile | Upgrade Manager | **Metadata Database Connection** | Reporting Database

i A connection string is required to establish database connectivity. You can type in the string, copy and paste an existing string or use any of the provided wizards to build a connection string.

Connection String:

Data Source=QASQL2K8;Initial Catalog=Raja_AdHocMetaData;User Id=sa;Password=xxxxxxx;Port=1433;

Build a MySQL connection string...
Build an Oracle connection string...
Build a SQL Server connection string...

Database: SQL Server ▼

Connection Type: SQL Server ▼

Test Connection Save Connection

The connection string to the metadata database may be established by either entering the information in the *Connection String*: text box (as shown above) or by using one of the connection string dialogs provided.

To enter a MySQL, Oracle or SQL Server connection string through the dialogs, click on either the **Build a MySQL connection string** link, the **Build an Oracle connection string** link, or the **Build a SQL Server connection string** link, respectively. One of the following dialogs will be presented.

The image displays three separate dialog boxes for configuring database connections. Each dialog has a title bar and a light green header. The MySQL dialog has fields for Server, Database, Username, and Password. The Oracle dialog has fields for Server, Service Name, Port (pre-filled with 1521), Username, and Password. The SQL Server dialog has fields for Server, Database, Port (pre-filled with 1433), Username, and Password. All dialogs include OK and Cancel buttons at the bottom.

Dialog Title	Fields	Pre-filled Values
MySQL Connection	Server, Database, Username, Password	
Oracle Connection	Server, Service Name, Port, Username, Password	Port: 1521
SQL Server Connection	Server, Database, Port, Username, Password	Port: 1433

Enter the credentials in the dialog and click the **OK** button. This will post the generated connection string into the *Connection String* text box.

Once a connection string has been configured, click on the **Test Connection** button to verify the connection. If the test is successful, click on the **Save Connection** button store the connection information in the *_Definitions/_Settings.lgx* file in the Ad Hoc Java instance.


Reporting Database


Before an Ad Hoc Java instance can be accessed for reporting, at least one reporting database must have been identified and some portion of the schema for that reporting database must have been imported into the metadata database associated with the Ad Hoc Java instance.

The **Reporting Database** link presents a page that will allow the System Administrator to manage the reporting database connections for the Ad Hoc Java instance. In addition, the schema of the reporting database(s) is managed through this link as well as the friendly names of the objects and columns in the schema.


Click on the **Reporting Database** link to display the following page:

User Profile | Upgrade Manager | Metadata Database Connection | **Reporting Database**

<input type="checkbox"/>	Database Name	Actions
<input type="checkbox"/>	Database1	

Legend:  Modify Database

The page displays the list of reporting databases available in the Ad Hoc instance. A new reporting database may be configured by clicking on the **Add Database** button.

Clicking on the  icon for a specific reporting database will allow the System Administrator modify the connection, schema, and user friendly names.

When the Add Database or Modify icon are clicked, the following page is displayed:

User Profile | Upgrade Manager | Metadata Database Connection | Reporting Database

❗ A connection string is required to establish database connectivity. You can type in the string, copy and paste an existing string or use any of the provided wizards to build a connection string.

Database Label:

Connection String:

[Build a MySQL connection string...](#)
[Build an Oracle connection string...](#)
[Build a PostgreSQL connection string...](#)
[Build a SQL Server connection string...](#)

Command Timeout:

Database:

Connection Type:

The name displayed in the Ad Hoc Java instance for the reporting database may be entered or modified in the *Database Label* text box.

The connection string for the reporting database may be entered or modified directly in the *Connection String* text area. Options to build the connection string from a dialog are presented via the **Build a MySQL connection** string link and the **Build an Oracle connection** string link.

The application will determine a default *Command Timeout* attribute, *Database* and *Connection Type*, however, these may be overridden by the System Administrator if necessary.

Click on the **Test Connection** button to verify that the reporting database is accessible with the credentials provided.

Click on the **Save Connection** button to store the connection information in the *_Definitions/_Settings.lgx* file and in the metadata database.

Click on the **Back to Database List** button to return to the previous page.

Once a valid reporting database connection has been established and saved, the **Get Schema** button will become enabled. This will present a page with the available objects and columns from the reporting database schema. The page allows the System Administrator to select the portions of the schema that must be available for reporting.

Click on the **Get Schema** button to display the following page:

[User Profile](#) | [Upgrade Manager](#) | [Metadata Database Connection](#) | [Reporting Database](#)

Step 1 of 2 – Import Data Objects

i To manage object and column definitions in the metadata database, select the objects and columns and click on either the "Add Selected" or "Remove Selected" buttons.

To set user-friendly names for objects and columns, click on the "Define Friendly Names" button. It is highly recommended that friendly names are defined to improve the end-user experience.

Objects per page:

- ☐ Tables
- ☐ 1Funny-Table
 - ☐ AdHocLog
 - ☐ AutomatedTestNorthwind
 - ☐ Categories
 - ☐ CeCity
 - ☐ CustomerCustomerDemo
 - ☐ CustomerDemographics
 - ☐ Customers
 - ☐ Customers_old
 - ☐ Data_Type_Test

 Page of 6 Legend: Source only Both Different Logi Ad Hoc Reporting only

The primary focus of the page is the list of objects and columns. There are two tabs of objects and columns, one for all of the tables in the reporting database and one for all of the views.

The list is color coded based on a comparison of the schema information in the reporting database to the schema information found in the metadata database.

Objects and columns in black only exist in the reporting database and are the typical candidates for import into the metadata database.

Objects and columns listed in green match between the reporting database and the metadata.

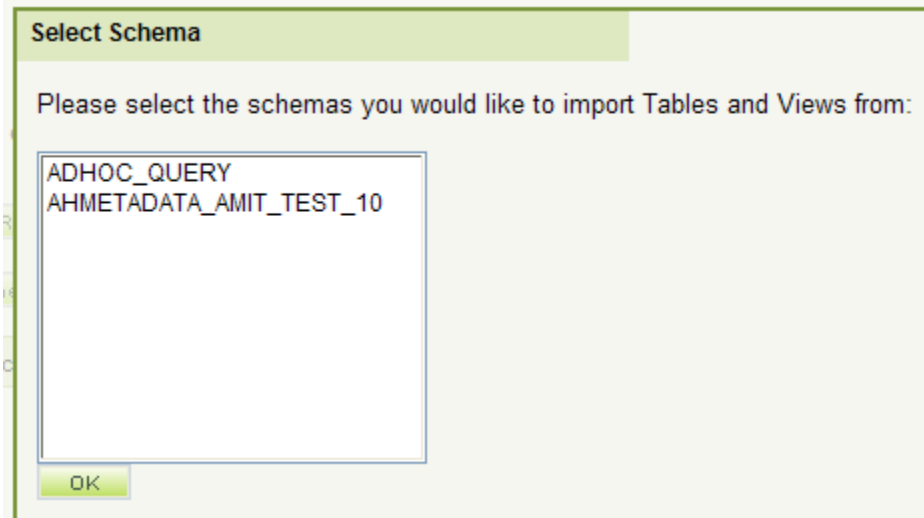
Objects and columns listed in orange are found in both the metadata and the reporting database, however, their schema definitions may be different.

Objects and columns listed in red only appear in the metadata database and have no corresponding information in the reporting database. These items should be fixed because reports built using these objects and columns will fail.

To work with the schema information, highlight the objects and columns and click on the **Add Selected** button or the **Remove Selected** button to add or remove the schema information in the metadata database, respectively.

Notes:

- 1) The reporting database schema cannot be affected by the webMC
- 2) Highlighting the object automatically highlights the columns
- 3) The columns may be viewed by expanding the tree for the object
- 4) To select all objects and columns, set the *Objects per page* to 0 and click on the *Tables* checkbox (or the *Views* check box on the *Views* tab)
- 5) For Oracle reporting databases, a list of schemas will be presented (see below) to allow the objects and columns to be filtered. Select the schema(s) from the list and click on the **OK** button.



To return to the *Database Connection* page, click on the **Back to Database Connection** button.

Click on the **Define Friendly Name** button to manage the names of the objects and columns presented to the end user. Although this is not a required step, it is highly recommended to improve the end-user experience. The following page will be presented:

[User Profile](#) | [Upgrade Manager](#) | [Metadata Database Connection](#) | [Reporting Database](#)

Step 2 of 2 – Define Friendly Names

i Friendly Names are displayed to the end user and are used as the default identification of data in a report. The Friendly Names may be set manually or generated by selecting the objects/columns, clicking on the "Generate Friendly Name" button and selecting one of the available rules.

Objects per page:

[Expand All](#)

<input type="checkbox"/>	Object Name	Friendly Name
<input type="checkbox"/>	1Funny-Table	<input type="text" value="1 Funny- Table"/>
<input type="checkbox"/>	AdHocLog	<input type="text" value="Ad Hoc Log"/>
<input type="checkbox"/>	Alphabetical list of products	<input type="text" value="Alphabetical list of prod"/>
<input type="checkbox"/>	AutomatedTestNorthwind	<input type="text" value="Automated Test Northw"/>
<input type="checkbox"/>	Categories	<input type="text" value="Categories"/>
<input type="checkbox"/>	Category Sales for 1997	<input type="text" value="Category Sales for 199"/>
<input type="checkbox"/>	CeCity	<input type="text" value="Ce City"/>
<input type="checkbox"/>	Current Product List	<input type="text" value="Current Product List"/>
<input type="checkbox"/>	Customer and Suppliers by City	<input type="text" value="Customer and Supplier"/>
<input type="checkbox"/>	CustomerCustomerDemo	<input type="text" value="Customer Customer D"/>
<div><input type="button" value="Previous"/> <input type="button" value="First"/> Page <input type="text" value="1"/> of 9 <input type="button" value="Next"/> <input type="button" value="Last"/></div>		

The *Friendly Names* of the objects and columns may be entered in the text boxes provided. To specify the *Friendly Name* for columns, show the columns for an object by expanding the object in the tree. The picture below is an example:

[User Profile](#) | [Upgrade Manager](#) | [Metadata Database Connection](#) | [Reporting Database](#)

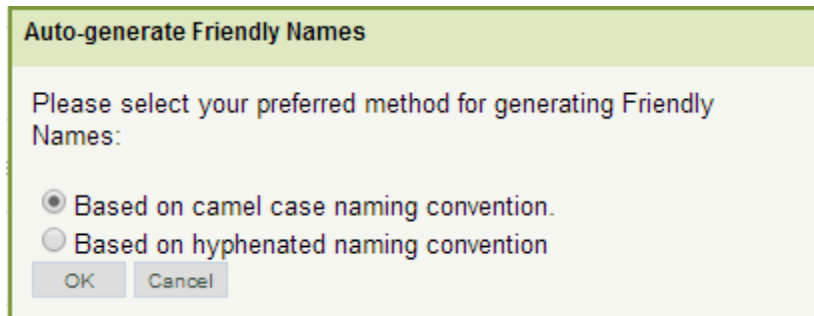
Step 2 of 2 – Define Friendly Names

i Friendly Names are displayed to the end user and are used as the default identification of data in a report. The friendly names may be set manually or generated by selecting the objects/columns, clicking on the "Generate Friendly Name" button and selecting one of the available rules.

<input type="checkbox"/>	Object Name	Friendly Name																								
<input type="checkbox"/>	cascadefilterdetails	<input type="text" value="cascadefilterdetails"/>																								
<table border="1"> <thead> <tr> <th></th> <th>Column</th> <th>Friendly Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>DisplayColumnID</td> <td><input type="text" value="DisplayColumnID"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FilterColumnID</td> <td><input type="text" value="FilterColumnID"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FilterDetailID</td> <td><input type="text" value="FilterDetailID"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FilterID</td> <td><input type="text" value="FilterID"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FilterOrder</td> <td><input type="text" value="FilterOrder"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>ObjectID</td> <td><input type="text" value="ObjectID"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>ValueColumnID</td> <td><input type="text" value="ValueColumnID"/></td> </tr> </tbody> </table>				Column	Friendly Name	<input type="checkbox"/>	DisplayColumnID	<input type="text" value="DisplayColumnID"/>	<input type="checkbox"/>	FilterColumnID	<input type="text" value="FilterColumnID"/>	<input type="checkbox"/>	FilterDetailID	<input type="text" value="FilterDetailID"/>	<input type="checkbox"/>	FilterID	<input type="text" value="FilterID"/>	<input type="checkbox"/>	FilterOrder	<input type="text" value="FilterOrder"/>	<input type="checkbox"/>	ObjectID	<input type="text" value="ObjectID"/>	<input type="checkbox"/>	ValueColumnID	<input type="text" value="ValueColumnID"/>
	Column	Friendly Name																								
<input type="checkbox"/>	DisplayColumnID	<input type="text" value="DisplayColumnID"/>																								
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<input type="checkbox"/>	ObjectID	<input type="text" value="ObjectID"/>																								
<input type="checkbox"/>	ValueColumnID	<input type="text" value="ValueColumnID"/>																								
<input type="checkbox"/>	cascadefilters	<input type="text" value="cascadefilters"/>																								

As a possible alternative to the manual entry of the *Friendly Names*, the application provides a mechanism to generate the *Friendly Names* for selected objects and columns according to pre-defined rules.

Highlight objects and columns and click on the **Generate Friendly Names** button. The following dialog will be presented:



The dialog box is titled "Auto-generate Friendly Names". It contains the text "Please select your preferred method for generating Friendly Names:". Below this text are two radio button options. The first option is "Based on camel case naming convention." and it is selected. The second option is "Based on hyphenated naming convention". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The *Based on camel case naming convention* rule will insert a space when there is a case change in the database name. For example, "DatabaseName" would become "Database Name" as the Friendly Name.

The *Based on hyphenated naming convention* rule will replace hyphens in the database name with spaces. For example, "Database-Name" would become "Database Name" as the Friendly Name.

Click on the **OK** button to generate the Friendly Names based on the selected rule for the highlighted objects and columns.

CONTACT US

If you would like information about other Logi Analytics products, or require assistance beyond this user manual, please contact Logi Analytics in the following ways:

Corporate Headquarters

Phone: 1-888-LOGIXML (1-888-564-4965)
(703) 752-9700

Fax: (703) 995-4811

Email: info@logianalytics.com

Address: 7900 Westpark Drive, Suite A200
McLean, VA 22102

Web Site: www.logianalytics.com

Sales Department

Phone: 1-888-LOGIXML (1-888-564-4965)
(703) 752-9700

Email: sales@logianalytics.com

Customer Support

Phone: 1-888-LOGIXML (1-888-564-4965)
(703) 752-9700

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