

Logi Ad Hoc Reporting Session Parameters



**Version 10.0.76+
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What Are Session Parameters?

Session parameters, also called session variables, in the context of a web session are values that are available for the life of the session to web application. The values are referenced by the web application by a defined name.

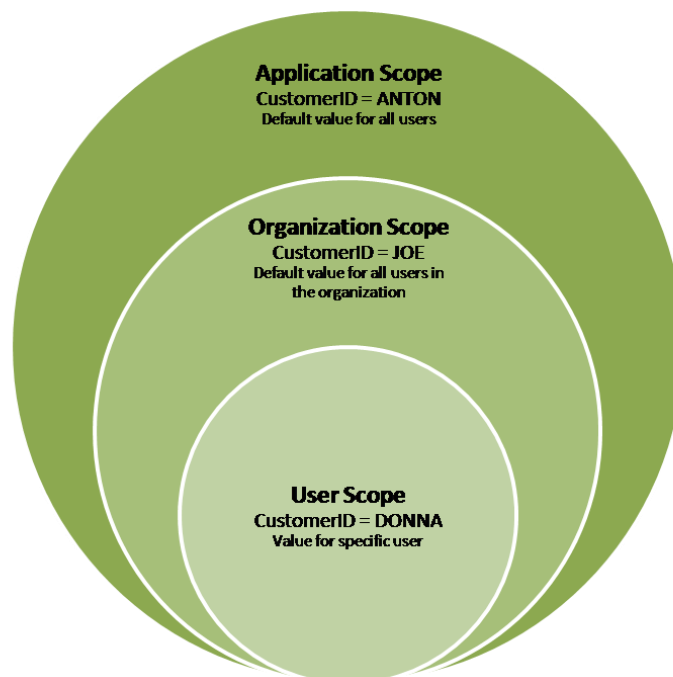
Session parameters are generally defined and managed by IIS, a parent web application, or by the Ad Hoc application. For this paper, only the Ad Hoc related session parameters will be considered.

Some examples of session parameters that are used throughout this paper are the spCustomerID, spCustomerIDList, and spProductID. Their values will be determined during the course of the following discussion, however, if the spCustomerID session parameter is set to a value of "ANTON", that value will persist for the life of the session unless specifically over-ridden.

What does “Scope” mean?

In the context of Ad Hoc session parameters, scope refers to the range of application of a session parameter value. The session parameter exists for the life of a session, but the value of a session parameter is determined by the current scope.

In Ad Hoc, the initial definition of a session parameter determines the default value. This value may be over-ridden at the organization level which could be considered the “organization scope”. With version 10.0.71, the value may be over-ridden at the user level. Ultimately, when a user logs into Ad Hoc, the session parameter value will be determined by this system of defaults and over-rides.



From the picture above, the CustomerID session parameter value is set to “ANTON”. This is the default value for the session parameter. In the absence of any over-rides, all users of the application will see “ANTON” when the CustomerID session parameter is referenced.

The session parameter value may be over-ridden at the Organization level. From the picture above, the CustomerID session parameter has been over-ridden for an organization and set to “JOE”. In the absence of any further over-rides, all users that are members of the organization will see “JOE” when the CustomerID session parameter is referenced.

The session parameter value may be set at the User level. From the picture above, the CustomerID session parameter has been set for a specific user to "DONNA". That user will see "DONNA" whenever the CustomerID session parameter is referenced. If a session parameter value has been set at the User level, this value supersedes all default values for the session parameter.

Note: User scope for session parameter values is new feature in Versions 10.0.71 and higher.

Session parameter values will be determined for every user accessing the application. The concept of scope has been incorporated into the Ad Hoc interface to assist with the administration of session parameter values.

How are Session Parameters used?

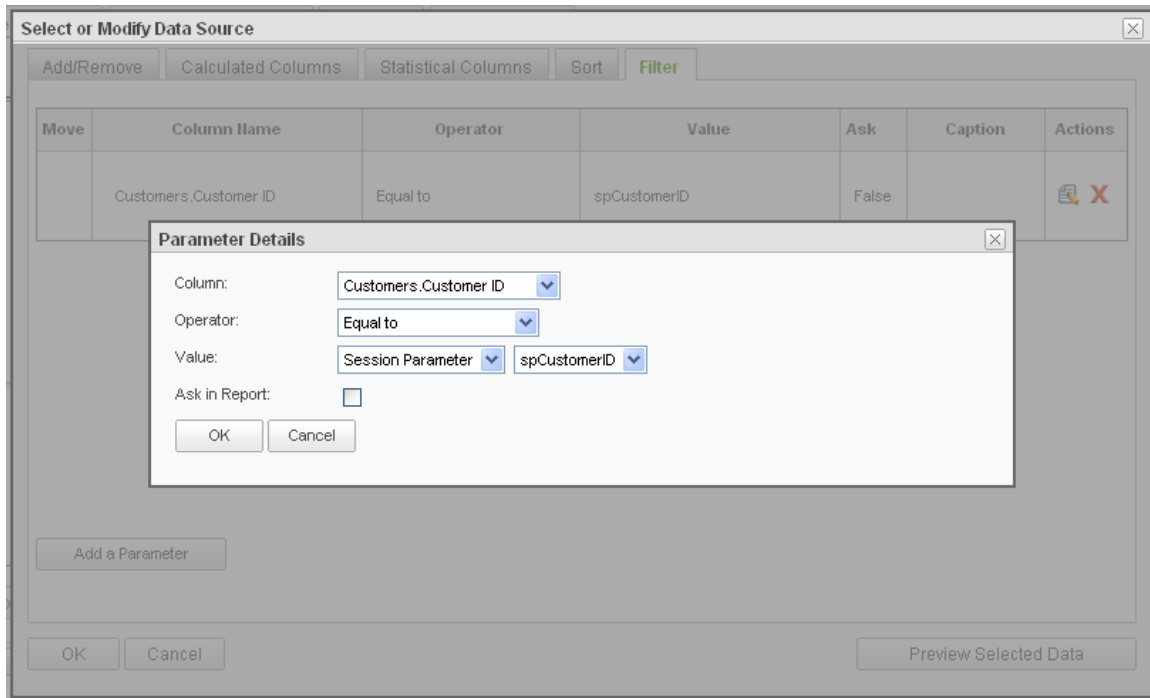
Session parameters may be used throughout Ad Hoc wherever a value may be supplied. In prior versions of Ad Hoc, session parameters were used by specifying an @Session token instead of a value.

As an example, if a label was used in a report the label value could have been set literally as "Label Goes Here". To do the same thing using a session parameter, the label value might be set as @Session.LabelValue~. The actual value of the session parameter will replace the token reference when the report is run.

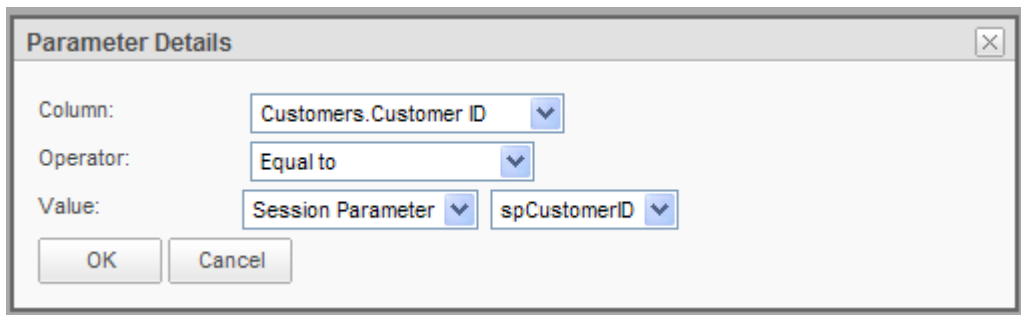
The image displays two side-by-side screenshots of the 'Label Information' form in the Logi10 Ad Hoc Reporting interface. Both screenshots show the same form structure with three fields: 'Label', 'Label Type', and 'Style'. In the left screenshot, the 'Label' field contains the text 'Label Value Goes Here'. In the right screenshot, the 'Label' field contains the session parameter token '@Session.LabelValue~'. Both screenshots show 'Label Type' set to 'Simple' and 'Style' set to an empty dropdown menu.

That @Session syntax is still available in the current version of Ad Hoc; however, there are places in the Ad Hoc user interface that a session parameter can be used by simply referring to the name of the session parameter.

The *Filter* and *Data Object Parameter* dialogs are the most obvious examples. See the examples below:



Notice that for the *Value* the source is set to “Session Parameter” and the value is set to spCustomerID in the filter definition.



The same logic and interface are also presented in the **Set Parameters** option for a Data Object (above).

How do I define a Session Parameter in Ad Hoc?

Initial Definition

Session parameters are initially defined by clicking on **Configuration**.

If the ability to define and configure *Organizations* has been enabled, the **Session Parameters** link will be found under the **User Configuration** tab. Otherwise, the **Session Parameters** link will be found under **Application Configuration**.

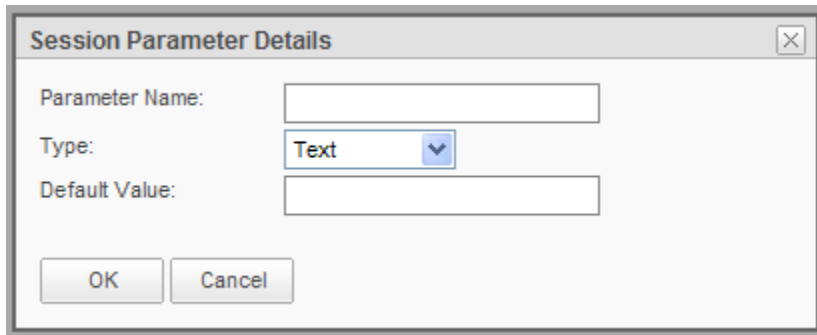
Click on the **Session Parameters** link to display the following page:

<input type="checkbox"/>	Parameter Name	Type	Default Value	Actions
<input type="checkbox"/>	spCustomerID	Text	ANTON	>

The Session Parameters page presents a list of defined session parameters.

To remove a session parameter, highlight the session parameter by clicking on the checkbox adjacent to the session parameter and click on the **Delete** button.

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

A screenshot of a dialog box titled "Session Parameter Details". It contains three input fields: "Parameter Name:" with an empty text box, "Type:" with a dropdown menu showing "Text", and "Default Value:" with an empty text box. At the bottom are "OK" and "Cancel" buttons.

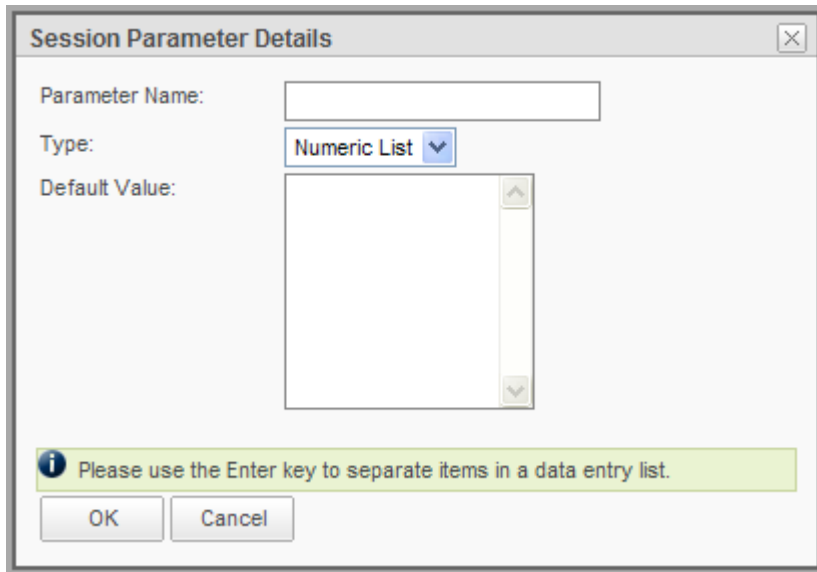
The *Parameter Name* attribute is how the session parameter will be referenced throughout the application.

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

The *Types* include:

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

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

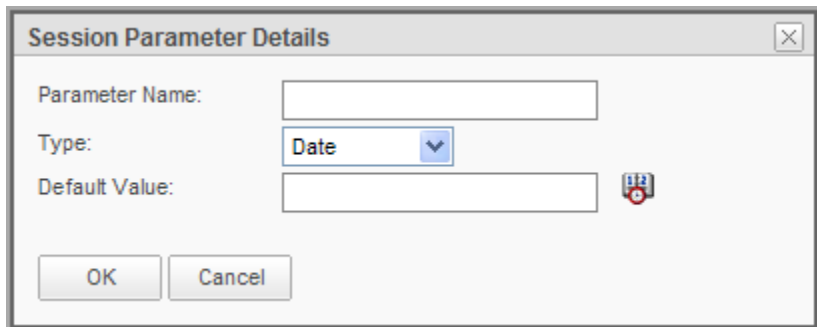


The dialog box titled "Session Parameter Details" contains the following fields:

- Parameter Name:** A text input field.
- Type:** A dropdown menu with "Numeric List" selected.
- Default Value:** A list box with up and down arrow buttons on the right side.

Below the fields is a green information bar with an 'i' icon and the text: "Please use the Enter key to separate items in a data entry list." At the bottom are "OK" and "Cancel" buttons.

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



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

- Parameter Name:** A text input field.
- Type:** A dropdown menu with "Date" selected.
- Default Value:** A text input field with a date picker icon (calendar) to its right.

At the bottom are "OK" and "Cancel" buttons.

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

Modifying Session Parameters

Session parameters and their initial (default) values are defined through the *Session Parameters* page. The values may be over-ridden at the Organization and User levels.

Pages and tools have been provided to manage the values for each organization and user and across all organizations and users.

The action option for setting the session parameter value for a single organization or user is **Set Session Parameters**. The actions for setting session parameter values across all organizations and users are **Set by Organization** and **Set by User**, respectively.

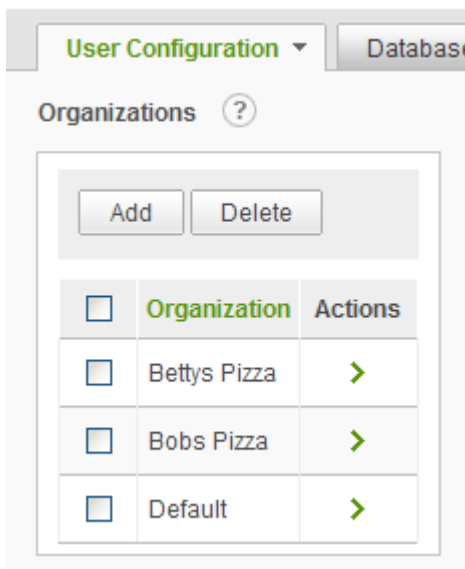
In addition, buttons have been provided to set the session parameter values across a range of organizations and users. The **Restore Defaults** button will set the targeted session parameter value to the default value for all selected organizations or users. The **Set Value** button will present a dialog to specify a new value and the new value will be applied to all selected organizations or users.

Organization Session Parameters

Organizations either use the session parameter value as it was originally defined or the adjusted the session parameter value specific to the organization. The actual session parameter must have been created through the session parameters page. Only the value may be adjusted for the organization.

If a session parameter value is set for an organization, that value will be applied to all users within that organization unless specifically over-ridden at the user level.

To review or adjust the session parameter values for an organization, click on **Configuration** and select **Organizations** from the *User Configuration* menu. The following page will be displayed:




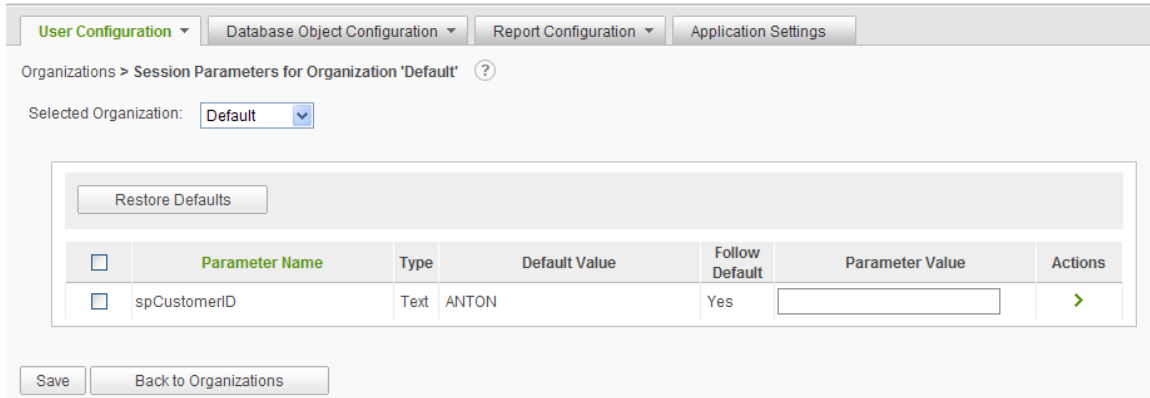
User Configuration ▾ Database


Organizations ?

Add Delete

<input type="checkbox"/>	Organization	Actions
<input type="checkbox"/>	Bettys Pizza	>
<input type="checkbox"/>	Bobs Pizza	>
<input type="checkbox"/>	Default	>

Hover the mousepointer over the Action icon  for an organization and select **Set Session Parameters** from the list of actions. The following page will be presented:



<input type="checkbox"/>	Parameter Name	Type	Default Value	Follow Default	Parameter Value	Actions
<input type="checkbox"/>	spCustomerID	Text	ANTON	Yes	<input type="text"/>	

The *Selected Organization* identifies the organization that was the action target from the previous page. The dropdown list allows the Administrator to select other organizations and review or adjust their session parameters without having to return to the Organizations page.

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

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

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

If the *Parameter Value* is set to something other than the default value, the “*Follow Default*” value will be set to No.

Other *Actions* include **Restore Default** to set the value for the session parameter back to the default value and **Define by User** that presents a page of users that are members of the organization and their defined session parameter.

User Configuration ▾

Database Object Configuration ▾

Report Configuration ▾

Application Settings

Session Parameters > Organization Session Parameters > Session Parameter 'spCustomerId' for Users

Selected Session Parameter:

spCustomerId ▾

Default Value:

ANTON

Type:

Text

Role:

All ▾

Restore Default

Set Value

<input type="checkbox"/>	User	Is Default	Parameter Value	Actions
<input type="checkbox"/>	Admin	Yes	<input type="text"/>	>
<input type="checkbox"/>	Jim	Yes	<input type="text"/>	>

Save

Back to Session Parameters

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

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

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

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

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

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

The *Is Default* column gives an indication as to whether the value for the user matches the default value for the Organization.

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

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

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

User Session Parameters

User level session parameters may be set, as described above, by navigating through the Organization configuration pages. In the event that the Ad Hoc instance is not configured to use Organizations, user-level session parameter values may be set by clicking on Configuration and selecting Session Parameters from the Application Configuration menu.

To change the session parameter value for specific users, hover the mousepointer over the *Actions* > icon and select **Define by User** from the list of actions. This will present the following page:

User Configuration ▾

Database Object Configuration ▾

Report Configuration ▾

Application Configuration ▾

Session Parameters > Session Parameter 'spCustomerID' for Users

Selected Session Parameter: spCustomerID ▾

Default Value: ANTON

Type: Text

Role: All ▾

Restore Default

Set Value

<input type="checkbox"/>	User	Is Default	Parameter Value	Actions
<input type="checkbox"/>	Admin	No	ANTON	>
<input type="checkbox"/>	Jim	Yes		>

Save

Back to Session Parameters

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

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

Usage Scenarios

In Data Object Parameters

Data Objects may be configured to have filters permanently set on the data that may be returned. A session parameter may be used as part of the filter definition. For example, a Customers data object might be permanently filtered on the Country column using a session parameter in the filter condition as in the following figure:

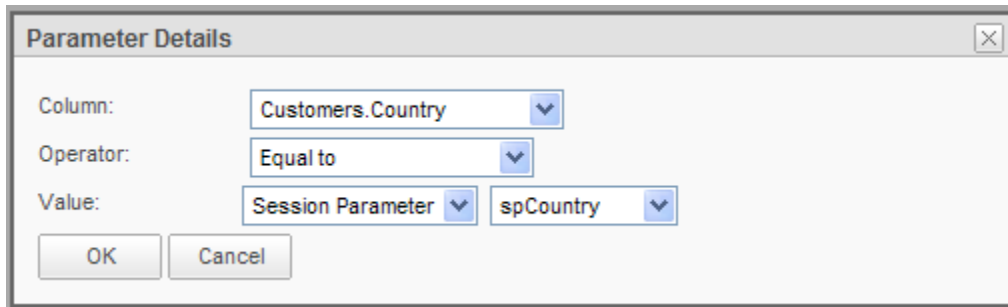
The screenshot displays the 'Database Object Configuration' tab in the Logi10 Ad Hoc Reporting application. The main window shows 'Data Objects > Fixed Parameters for 'JIM.Customers'' with a help icon. A 'Parameter Details' dialog box is open, allowing configuration of a filter. The dialog contains the following fields:

- Column:** A dropdown menu set to 'Customers.Country'.
- Operator:** A dropdown menu set to 'Equal to'.
- Value:** A dropdown menu set to 'Specific Value' and a text input field containing '@Session.spCountry~'. A magnifying glass icon is to the right of the input field.

At the bottom of the dialog are 'OK' and 'Cancel' buttons. Below the dialog, a summary bar shows the configured filter: 'Customers.Country Equal to @Session.spCountry' followed by a green right-pointing arrow. At the bottom of the main window are 'Save' and 'Back to Data Objects' buttons.

In older versions of Ad Hoc, the @Session token would have been used as the Specific Value for the filter.

In the current release of Ad Hoc, a more user-friendly option has been provided.

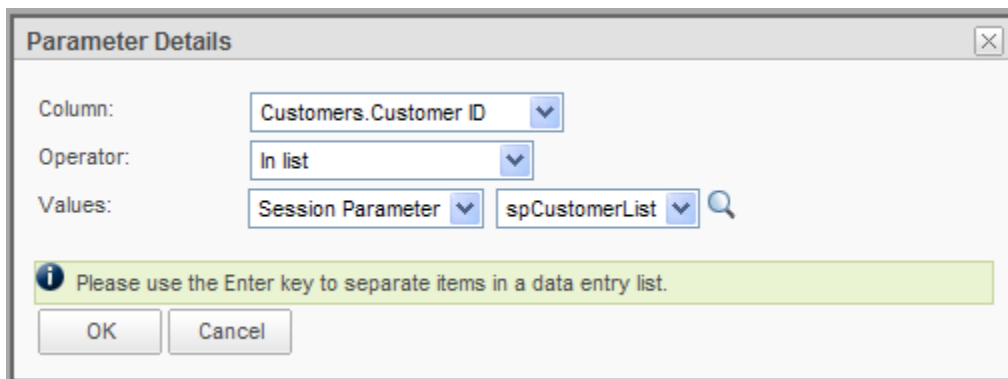


The image shows a 'Parameter Details' dialog box. It has three main fields: 'Column:' with a dropdown menu showing 'Customers.Country', 'Operator:' with a dropdown menu showing 'Equal to', and 'Value:' with two dropdown menus showing 'Session Parameter' and 'spCountry'. At the bottom, there are 'OK' and 'Cancel' buttons.

Notice that the *Value* source option is set to *Session Parameter* and the value is set to the session parameter name, “*spCountry*”.

The actual value of the *spCountry* session parameter will be determined by the value set for the logged in user for the current session. The value may be the original value defined for the session parameter or the organization level over-ride or the user level over-ride. The actual value will be determined when the user initially logs into Ad Hoc and establishes a session.

To demonstrate the value of the *Type* attribute of a session parameter, a “textual list” type session parameter named “*spCustomerList*” was created. The initial value was set to a list of Customer ID’s for the session parameter. In the following picture:



The image shows a 'Parameter Details' dialog box. It has three main fields: 'Column:' with a dropdown menu showing 'Customers.Customer ID', 'Operator:' with a dropdown menu showing 'In list', and 'Values:' with two dropdown menus showing 'Session Parameter' and 'spCustomerList'. Below these fields, there is a green informational bar with a magnifying glass icon and the text: 'Please use the Enter key to separate items in a data entry list.' At the bottom, there are 'OK' and 'Cancel' buttons.

The Customer ID column is a text column. The Operator selected was “In List”. The Values source was set to Session Parameter. The dropdown list of possible session parameters available in this context was restricted to the “textual list” session parameter type.

In a Data Source Filter

Every Ad Hoc report must have a data source defined as the basis for the report. One of the options on the data source is to specify a filter to be applied on the data returned to the report. Session parameters may be incorporated into the report filters in a manner similar to the Data Object Parameters outlined above.

From the **Select or Modify Data Source Dialog**:

The screenshot shows the 'Select or Modify Data Source' dialog box. The 'Filter' tab is selected. A 'Parameter Details' sub-dialog is open, showing the following configuration:

Field	Value
Column:	Customers.Country
Operator:	Equal to
Value:	Session Parameter (spCountry)
Ask in Report:	<input type="checkbox"/>

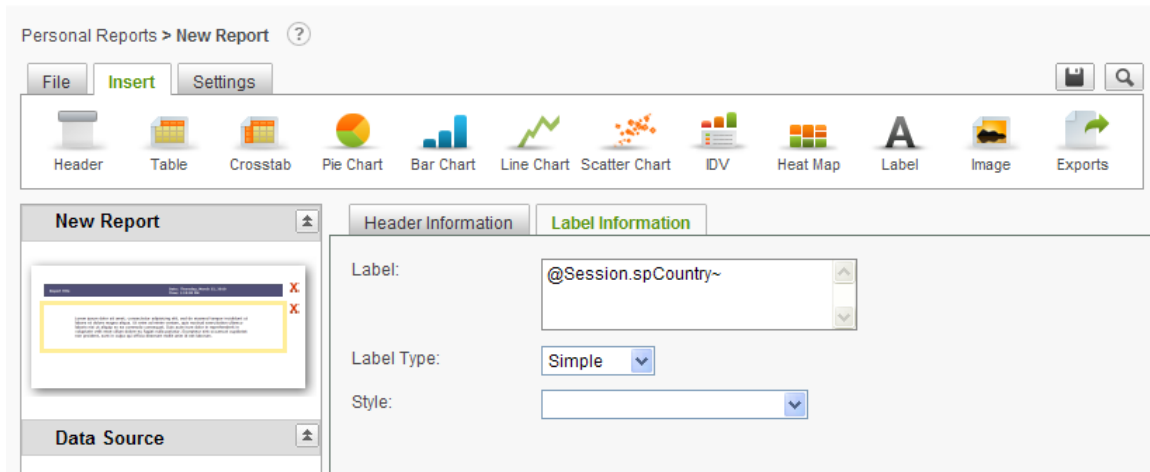
The main dialog box has a table with the following headers: Move, Column Name, Operator, Value, Ask, Caption, Actions. It also includes buttons for 'Add a Parameter', 'OK', 'Cancel', and 'Preview Selected Data'.

Records from the Customers data object will be filtered by the Customers.Country equal to the spCountry session parameter value. The actual value will be determined when the report is run.

In a Label or other Attributes

Session parameters values may be used for virtually any data oriented value in the report definition. The following example shows a session parameter used in a report label.

For a report label definition, following is an example of session parameter usage:



Personal Reports > New Report ?

File Insert Settings

Header Table Crosstab Pie Chart Bar Chart Line Chart Scatter Chart IDV Heat Map Label Image Exports

New Report

Header Information **Label Information**

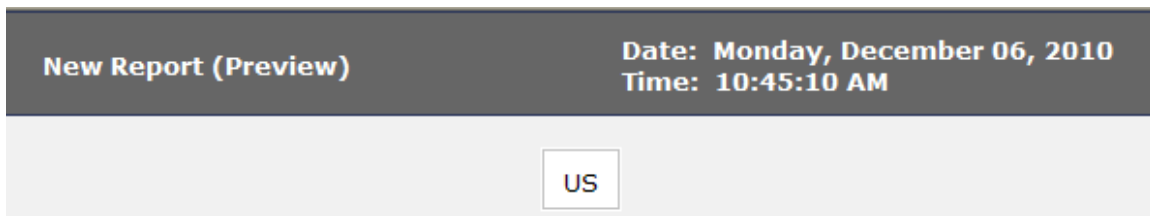
Label: @Session.spCountry~

Label Type: Simple

Style:

Data Source

And the resultant report would appear as:



New Report (Preview)

Date: Monday, December 06, 2010
Time: 10:45:10 AM

US

The session parameter token used in the report label definition was @Session.spCountry~. The value of that session parameter token was “US” when the report was run.

Notice that in this context the user must know the @Session token syntax and the exact session parameter name for the token to be resolved properly when the report is executed. This is the same functionality that existed in prior versions of Ad Hoc.

Record Level Security

With the extension of session parameters down to the user level, administrators have better options for implementing record level security.

Record level security is implemented by placing permanent filters (parameters) on the data objects to restrict the data that the user has access to. The basis for these filters could be session values established at the user level. In prior versions of Ad Hoc, the session values could have been established at the application or organization level. If the data had to be restricted at the user level, it wasn't possible to configure the session parameters to accomplish that goal.

With the current release, record level security down to the user level is possible. It is still not a security model inherent in the product, but the user level session parameters allow the System Administrator to define the data and schema structures such that data object parameters could be used to automatically filter data returned to that pertinent for each user.

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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