

ATIPXpress

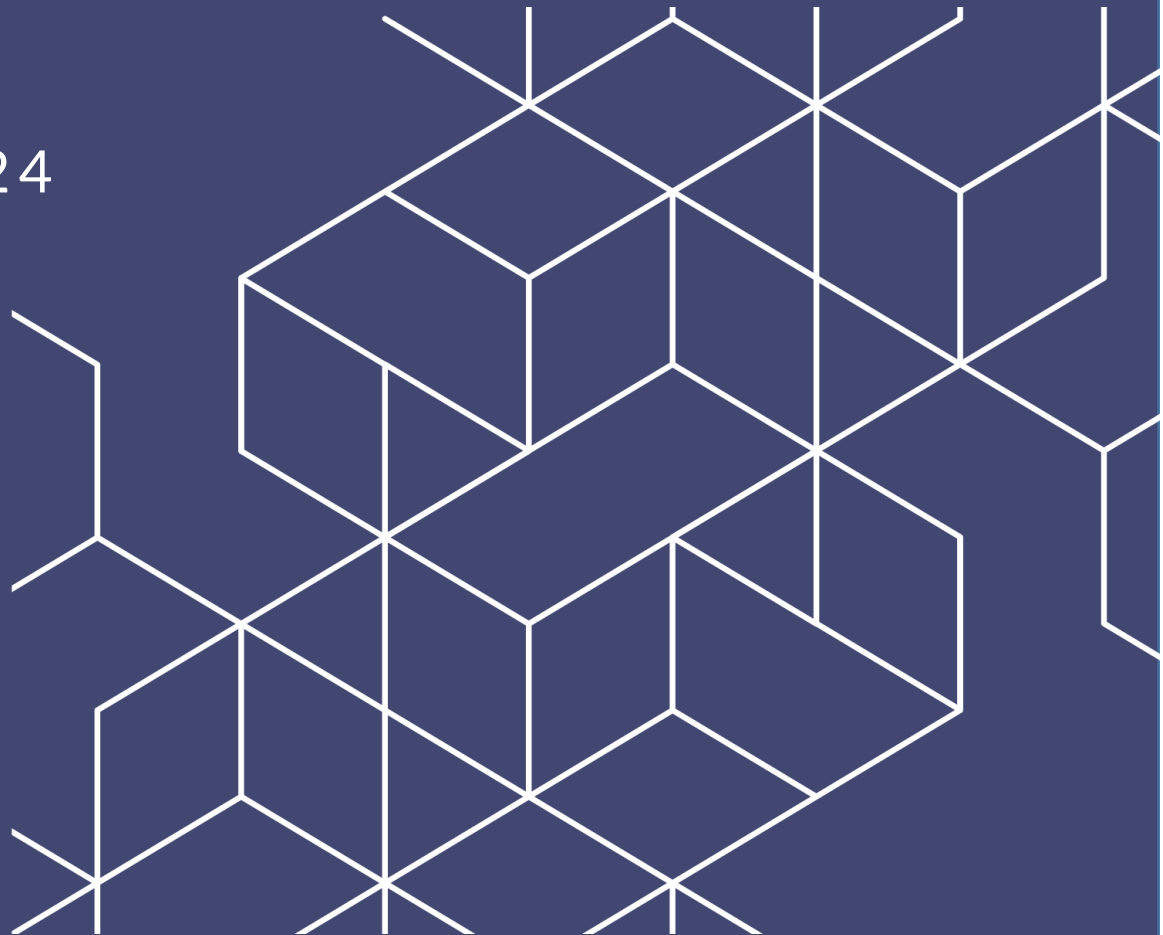


OPEXUS

PAL Dashboard Administration Configuration

v11.7.0

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AX 11.7.0 PAL Dashboard Administration Configuration

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1 Introduction

1.1 Scope

The purpose of this manual is to provide instructions to configure and use the PAL Dashboard Administration module.

1.2 Overview

PAL Dashboard Administration is a module of the PAL Configuration application that is used to configure the Dashboard module.

1.3 Prerequisites

Before proceeding with the configuration, it is necessary to have the ATIPXpress and PAL applications installed and configured on the application server.



2 Dashboard Administration

The *PAL Dashboard* module shows an at-a-glance graphical presentation of the current status (snapshot) and historical trends of PAL information. *PAL Dashboard Administration* provides a simple way to set up the PAL Dashboard application. These configurations are performed by the PAL administrator.

2.1 Accessing the Dashboard Administration Module

Administrators can access the *Dashboard Administration* module by one of the following methods:

- Via the PAL Configuration application
- Via URL

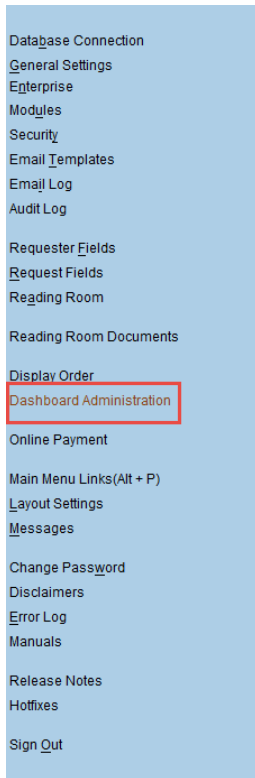
(!!) Note: To access Dashboard Administration from within PAL Configuration, the Dashboard Module option must be enabled and configured in the Modules Configuration screen.

Follow the steps below to access *Dashboard Administration* from within the PAL Configuration Application:

1. Login to the *PAL Configuration* application.
2. Click **Dashboard Administration**.



Dashboard Administration



To access *Dashboard Administration* from a URL:

1. Launch the browser application, (Microsoft Edge or Google Chrome).
2. Enter the application URL in the address field in the format <http://servername:portnumber/pxconfig/>.
 - a. “servername” is the name of the server that has the PAL installation.
 - b. “portnumber” is the assigned port for the PAL Configuration site, e.g. port 82.
 - c. “pxconfig” is the resource.
3. Press **Enter**.

(!!) Note: The URL must be the same address configured as the Administration URL in the PAL Configuration application.



4. The *Login* window appears after signing out of the *Dashboard Administration* application. The *Password* is the same used for the *PAL Configuration* application.





Dashboard Configuration Login

Login: Administrator

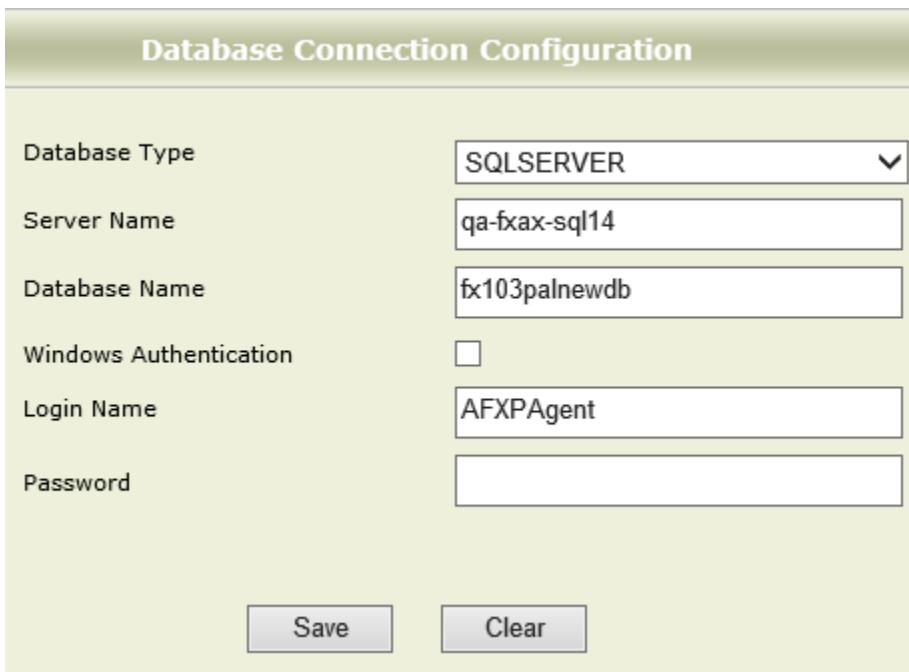
Password:

Login

2.2 Database Configuration

After logging into the *Dashboard Administration* module, the *Database Connection Configuration* screen appears. The information on this screen is automatically populated from the PAL Configuration application. The table below provides an outline of the fields found on this screen.

(!!) Note: Changes made on this screen affect the database connection settings in the PAL Configuration application.



Database Connection Configuration

Database Type: SQLSERVER

Server Name: qa-fxax-sql14

Database Name: fx103palnewdb

Windows Authentication: ☐

Login Name: AFXPAgent

Password:

Save Clear

2.3 Header Configuration

The *Header Configuration* section allows users to create a header and related text for the PAL Dashboard application.

1. Click **Header Config**.



Dashboard Administration

Header Configuration

Header Title : AINS, Inc. Max characters limit 50

Header Font Name : Arial

Header Font Size : 9

Baseline Text : IT Experience Database Repository Max characters limit 100

Baseline Font Name : Arial

Baseline Font Size : 9

AINS, Inc.
IT Experience Database Repository

2. Enter header details based on the fields outlined in the table below.

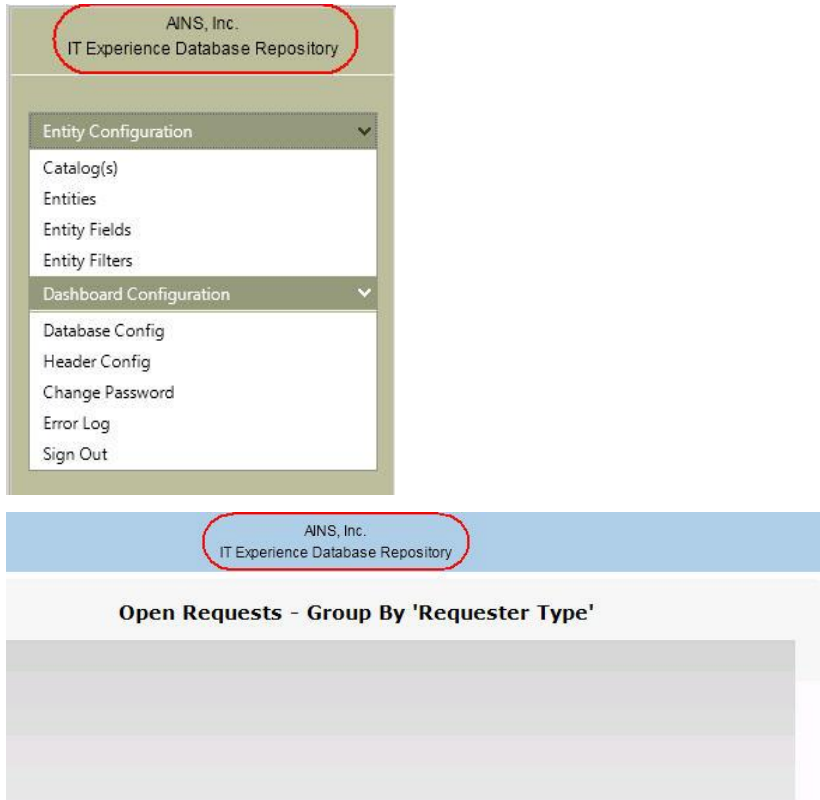
Field Name	Description
Header Title	The name given to the header.
Header Font Name	The title of the font used in the header.
Header Font Size	The size in points of the font used in the header.
Baseline Text	The wording that describes or identifies the header title.
Baseline Font Name	The title of the font used in the baseline text.
Baseline Font Size	The size in points of the font used in the baseline text.
Sample Display	Reveals how the information will appear in the Dashboard module.

3. Click **Save**.

4. The Header appears on the top left panel of the *Dashboard Administration* module, and at the top of the *Dashboard* module.



(!!) Note: If a logo is uploaded as part of the Enterprise Configuration in the PAL Configuration application, it appears in the *Dashboard* module when accessed from PAL using the *Dashboard* link.



2.4 Change Password

The *Change Password* option allows administrators to create a new password for the *Dashboard Administration* module. Follow the steps below to change a password:

(!!) Note: Changing the password affects access to the PAL Configuration application.

1. Click **Change Password**.



Change Administrator's Password

Please complete all the required fields marked with an asterisk (*)

Login : **Administrator**

Old Password : *

New Password : *

Confirm Password : *

Submit

2. Enter the **Old Password** in the *Old Password* field.
3. Enter the **New Password** in the *New Password* field.
4. Confirm the new password by entering the **New Password** into the *Confirm Password* field.
5. Click **Submit**.

(!!) Note: PAL Dashboard uses the same Password Policy administered for PAL. This policy must be followed to successfully change the password.

2.5 Error Log

The *Error Log* provides details to help identify problems and for troubleshooting issues that may arise while using the Dashboard module.

1. Click the **Error Log** link on the left panel.
 - a. Click **Clear** to remove the Error Log contents.
 - b. Click **Save** to store a copy of the Error Log to your local or network drive.



Dashboard Administration

Error Log Information

DateTime : 12/12/2013 12:36:03 PM

System.Data.SyntaxErrorException: Syntax error in the expression.

- at System.Data.ExpressionParser.Parse()
- at System.Data.DataExpression..ctor(DataTable table, String expression, Type type)
- at System.Data.DataView.set_RowFilter(String value)
- at AINSChartControl.PortalXpress.filterdata()

DateTime : 12/12/2013 12:36:03 PM

System.Data.SyntaxErrorException: Syntax error in the expression.

- at System.Data.ExpressionParser.Parse()
- at System.Data.DataExpression..ctor(DataTable table, String expression, Type type)
- at System.Data.Select..ctor(DataTable table, String filterExpression, String sort, DataView)
- at System.Data.DataTable.Select(String filterExpression)
- at AINSChartControl.PortalXpress.AddSeries(Series TempSeries, String ostr, String sNextF

Save

Clear

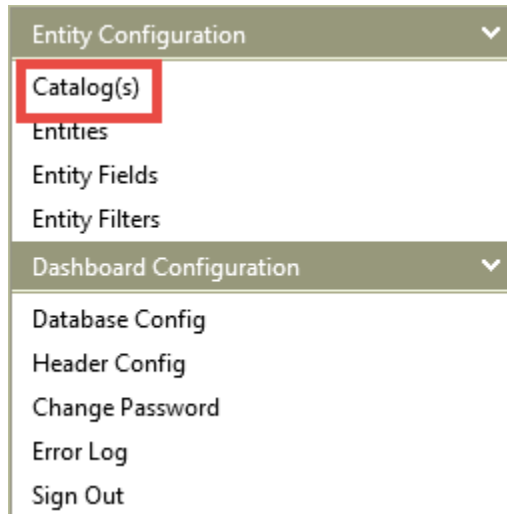


3 Entity Configuration

Entity Configuration allows Administrators to configure specific elements of the Dashboard Administration module, such as catalogs and entities. Entity Configuration has the PAL database as the default catalog and *Open* and *Closed Requests* as the two default entities.

3.1 Catalog

Catalog is used to store information about a database. The Dashboard Administration Catalog displays the information found on the *Database Connection Configuration* screen and is the same information used to connect to the PAL database. Users are able to delete, edit, or create a catalog.



3.1.1 Create a New Catalog

Follow the steps below to create a new catalog:

1. Click **Catalog(s)**. The (1) *Edit catalog* tab is displayed.



Entity Configuration

The screenshot shows a web interface for 'Entity Configuration'. At the top, there are two tabs: '1 Edit catalog' and '2 Add new catalog'. The 'Add new catalog' tab is active. Below the tabs, there are several form fields with labels and values:

- Catalog Name: PAL
- Server Type: Sql Server (dropdown menu)
- Server Name: Support-app19
- Database Name: Support21PAL10
- Windows Authentication: ☐ (unchecked)
- Login: sa
- Password: (empty text box)

2. Click the (2) **Add new catalog** tab.
3. Enter information (outlined in the table below) per your agency's requirements.

Field Name	Description
Catalog Name	The title given to the catalog.
Server Type	The type of server where the catalog is stored. The default value is SQL Server.
Server Name	The title given to the server where the catalog is stored.
Database Name	The title given to the database.
Windows Authentication	A process that identifies users and enables access to resources in a secure manner. When selected, the Login and Password fields become disabled.
Login	This is the user assigned the db_creator and securityadmin roles, that has access to and manages the database.

4. Click **Add**. The newly created catalog appears in the *Catalogs* screen.

(!!) Note: The database must already exist in SQL Server in order to successfully create a new catalog.



Entity Configuration

Catalog(s)

Server Type	Name	Server Name	Database Name	Login	Windows Authenticate
Sql Server	PAL	tw-ainsdocs	PALDB	AFXPAgent	False
Sql Server	Marcia	tw-ainsdocs	ecasedb	afxagent	False
Sql Server	FOIA	tw-ainsdocs	foiasalesdb	afxagent	False

Edit catalog

Add new catalog

Catalog Name

:

FOIA

Delete

Save

Server Type

:

Sql Server

Server Name

:

tw-ainsdocs

Database Name

:

foiasalesdb

☐ Windows Authentication

Login

:

afxagent

Password

:

3.1.2 Edit an Existing Catalog

Follow the steps below to edit an existing catalog:

1. From within the *Database Connection Configuration* screen, click **Catalog(s)**. The *Edit catalog* tab is displayed.

Edit catalog

Add new catalog

Catalog Name

:

PAL

Server Type

:

Sql Server

Server Name

:

Database Name

:

☐ Windows Authentication

Login

:

AFXPAgent

Password

:

2. Make any necessary edits and click **Save**.

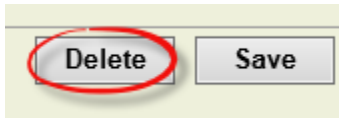


(!!) Note: Changes made to a catalog affect the database connection settings in the PAL application.

3.1.3 Delete an Existing Catalog

Follow the steps below to delete an existing catalog:

1. From within the *Database Connection Configuration* screen, click **Catalog(s)**. The *Edit catalog* tab is displayed.
2. Select the desired **catalog** from the top pane.
3. Click **Delete**. A verification message appears.



4. Click **Yes** to remove the catalog or **Cancel** to abort deleting the catalog.

(!!) Note: Removing a catalog affects the database connection in the PAL application. It is highly recommended to reconfigure the PAL database prior to deleting a catalog.

3.2 Entities

Entities represent a table or view that is associated with a catalog. Each entity has a Primary Key.

(!!) Note: The selected catalog must coincide with the current database configured for PAL.

3.2.1 Add a New Entity

Follow the steps below to add a new entity:

1. From within the *Database Connection Configuration* screen, click **Entities**. The (1) *Edit Entity* tab is displayed.

2. Click the (2) **Add new Entity** tab.
3. Select a catalog from the **Select Catalog** drop-down list.



Entity Configuration

- Expand the **Tables** or **Views** options and select the desired entity. The selected item automatically populates the *Entity Name* field and the *Primary Key* is automatically populated with column names associated with the entity.
- Select the **Primary Key**.
- Select the **Active** checkbox to enable this entity in the catalog.

The screenshot shows a web-based interface titled "Entities". At the top, there is a "Select Catalog" dropdown menu with "FOIA" selected. Below this is a "Select Entity" section containing a list of entities with checkboxes. The entities listed are: EC_USER_CERTIFICATION, EC_USER_CUSTOM_FIELDS, EC_USER_PASSWORDS, EC_USER_UNAVAILABLE_DATES, EC_USERPROFILE_SYNC_MAPPING, EC_USERS (checked), EC_VERSIONS, EC_WORKFLOW_CHOICE_VALUE, EC_WORKFLOW_INSTRUCTIONS, EC_WORKFLOW_QUESTION_TEMPLATE, tblActBasedUCategories, tblActTypes, tblAddress, tblAdminCosts, tblAdministrativeCosts, and tblAlerts. Below the list, there are two tabs: "Edit Entity" and "Add new Entity". The "Add new Entity" tab is active, showing a form with the following fields: "Entity Name" (populated with "EC_USERS"), "Primary Key" (populated with "USER_ID"), and "Active" (checked). An "Add" button is located to the right of the "Entity Name" field.

- Click **Add**. The entity is displayed on the screen.



The screenshot shows the 'Entities' configuration page. At the top, there is a 'Select Catalog' dropdown menu set to 'FOIA'. Below this is a table with the following data:

Name	Query	Object Name	Primary Key	Active
EC_USERS	Select * From EC_USERS	EC_USERS	USER_ID	True

Below the table is a large empty box. At the bottom, there are two tabs: 'Edit Entity' (selected) and 'Add new Entity'. The 'Edit Entity' form contains the following fields:

- Entity Name: EC_USERS
- Primary Key: USER_ID
- Active: ☒

There are 'Delete' and 'Save' buttons at the bottom right of the form.

3.2.2 Edit an Existing Entity

Follow the steps below to edit an existing entity:

1. Click **Entities**. The *Edit Entity* tab is displayed.

The screenshot shows the 'Edit Entity' form. It has two tabs: 'Edit Entity' (selected) and 'Add new Entity'. The form contains the following fields:

- Entity Name: Open Requests
- Primary Key: (empty dropdown menu)
- Active: ☒

2. Select a catalog from the **Select Catalog** drop-down list to modify existing entity information.
3. Make any necessary edits and click **Save**.

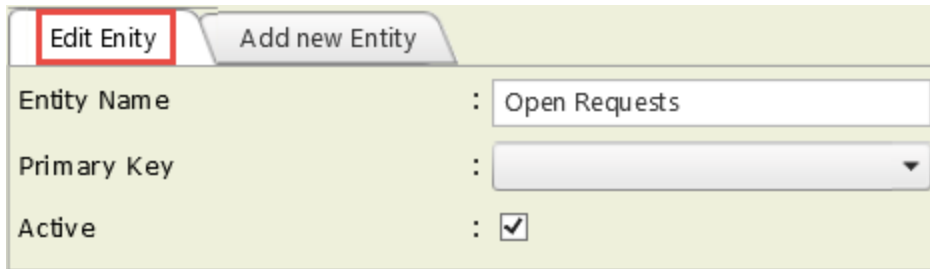
(!!) Note: Changes made to an entity affect how database information is presented in the PAL application.

3.2.3 Delete an Entity

Follow the steps below to delete an entity:

1. Click **Entities**. The *Edit Entity* tab is displayed.



The image shows a dialog box titled "Entity Configuration". It has two tabs: "Edit Entity" (which is selected and highlighted with a red rectangle) and "Add new Entity". Below the tabs, there are three fields: "Entity Name" with the value "Open Requests", "Primary Key" with a dropdown arrow, and "Active" with a checked checkbox.

2. Select the desired entity.
3. Click **Delete**. A verification message appears.



4. Click **Yes** to remove the entity or **Cancel** to abort deleting the entity.

(!!) Notes:

- **Entity fields and filters are automatically deleted.**
- **Removing an entity affects how database information is presented in the PAL application. It is highly recommended to reconfigure the PAL database prior to deleting an entity.**

3.3 Entity Fields

Entity fields represent columns in a table (entity). Entity fields are configured once an entity is created and can only be edited for display in the report after the database is configured.

1. Click **Entity Fields**.

Entity Configuration

Name	Database Column	Report Column	Show in Grid	Show in Group By	Show as Category
USER_ID	USER_ID	True	False	False	False
SITE_USER_ID	SITE_USER_ID	False	False	False	False
USER_NAME	USER_NAME	True	True	False	False
OS_DOMAIN	OS_DOMAIN	False	False	False	False
DEFAULT_GROUP_ID	DEFAULT_GROUP_ID	False	False	False	False
IS_ACTIVE	IS_ACTIVE	False	False	False	False
OFFICE_ID	OFFICE_ID	False	False	False	False
FIRST_NAME	FIRST_NAME	False	False	False	False
MIDDLE_NAME	MIDDLE_NAME	False	False	False	False
LAST_NAME	LAST_NAME	False	False	False	False

Edit Field
Field Name : USER_NAME
Report Column : ☒
Show in Grid : ☒
Show as Category : ☐
Show in Group By : ☐
Save

2. Select a **field**.
3. Select one or more of the following options based on your agency's requirements:
 - a. **Report Column:** Enables the column to be used in the Dashboard report.
 - b. **Show in Grid:** Displays the column name and data in the grid on the Dashboard report.
 - c. **Show as Category:** Specifies the data for the horizontal axis of the Dashboard chart.
 - d. **Show in Group By:** Specifies the data for the vertical axis of the Dashboard chart.
4. Click **Save** to retain the settings.
5. Repeat steps 2 – 4 for each field that needs to be configured.

3.4 Entity Filters

An Entity filter allows Administrators to manipulate how the data can be viewed and/or the type of data that can be viewed in a report. Entity filters coincide with fields in the selected entity. The data in these columns can be filtered by their values, a range, date, query and/or logical operator.

(!!) Note: If the field value is numeric, you can set the filter type to Values, Range or Logical Operator. If the field value is a string, you can select Values or Query as the filter type. Fields defined as a date must have Date as the filter type.



3.4.1 Add a New Filter

Follow the steps below to add a new filter:

1. Click the **Entity Filters** link on the left panel. The *Edit Filter* tab is displayed.

The screenshot shows the 'Entity Filters' configuration window. At the top, there are dropdowns for 'Catalog' (FOIA) and 'Entity' (EC_USERS). Below these is a table listing existing filters:

Filter Column	Visible Name	Type	Visible Data
USER_ID	USER_ID	Range	1 - 5
CREATED_DATE	CREATED_DATE	Date	-

Below the table, there are two tabs: 'Edit Filter' and 'Add New Filter'. The 'Add New Filter' tab is active. It contains the following fields:

- Filter Column**: USER_ID
- Filter Type**: Range
- Filter Value**: 1 - 5

There are 'Add', 'Remove', 'Save', and 'Delete' buttons at the bottom of the form.

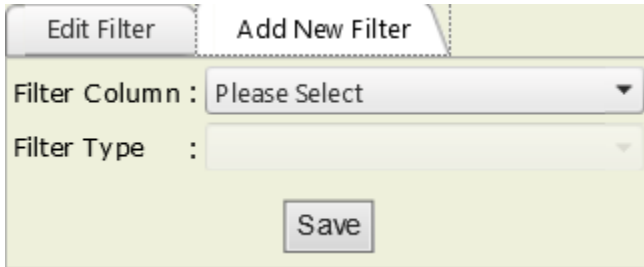
2. Click the **Add New Filter** tab.
3. Select a **Catalog** from the drop-down list. The *Entity* field automatically populates with the entity that corresponds to the selected catalog.
4. Select the **Filter Column** from the drop-down list.
5. Select a **Filter Type** based on your agency's requirements:
 - a. **Values**: Displays the data set for a column.
 - b. **Range**: Sets a specific limit on the values for a column.
 - c. **Query**: Displays built-in SQL statements for a column.
 - d. **Date**: Allows users to select a date in the Dashboard application.
 - e. **Logical Operator**: Allows users to select a logical operator in the Dashboard application (e.g., greater than, less than, or equal to).
6. Click **Save** to retain the settings.



3.4.2 Edit a Filter

Follow the steps below to edit a filter:

1. Click **Entity Filters**. The *Edit Filter* tab is displayed.



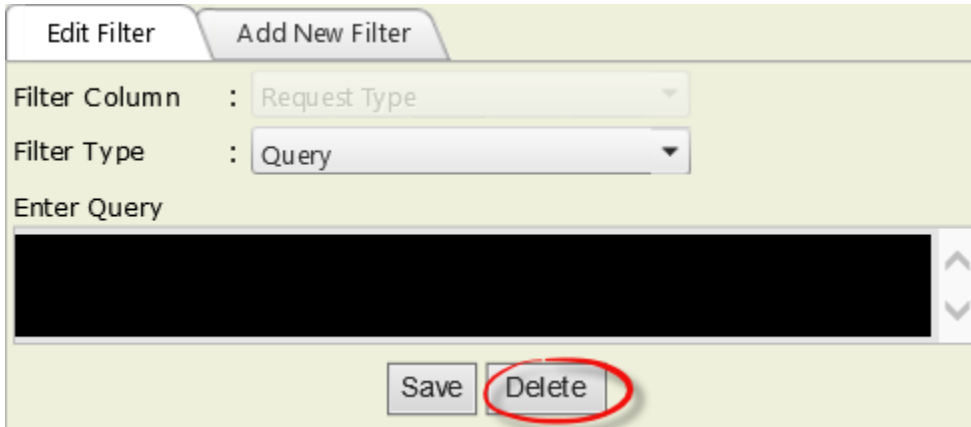
The screenshot shows the 'Edit Filter' tab interface. At the top, there are two tabs: 'Edit Filter' (active) and 'Add New Filter'. Below the tabs, there are two dropdown menus: 'Filter Column : Please Select' and 'Filter Type :'. At the bottom, there is a 'Save' button.

2. Select the column to modify.
3. Make any necessary edits, then click **Save**.

3.4.3 Delete a Filter

Follow the steps below to delete a filter:

1. Click **Entity Filters**. The *Edit Filter* tab is displayed.
2. Select the column to delete.
3. Click **Delete**.



The screenshot shows the 'Edit Filter' tab interface. At the top, there are two tabs: 'Edit Filter' (active) and 'Add New Filter'. Below the tabs, there are two dropdown menus: 'Filter Column : Request Type' and 'Filter Type : Query'. Below these, there is a text area labeled 'Enter Query'. At the bottom, there are two buttons: 'Save' and 'Delete'. The 'Delete' button is circled in red.