FOIAXpress popexus

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 FOIAXpress and PAL applications installed and configured on the application server.

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.

Database Connection	
<u>G</u> eneral Settings	
Enterprise	
Modules	
Security	
Email <u>T</u> emplates	
Ema <u>i</u> l Log	
Audit Log	
Requester <u>F</u> ields	
Request Fields	
Reading Room	
_	
Reading Room Documents	
Display Order	
Dashboard Administration	
Online Reyment	
onine rayment	
Main Menu Links(Alt + P)	
Layout Settings	
Messages	
Change Password	
Disclaimers	
Error Log	
 Manuals	
Release Notes	
Hotfixes	
Sign Out	
olgh <u>o</u> ut	

To access Dashboard Administration from a URL:

- 1. Launch the browser application, (Internet Explorer or Google Chrome).
- 2. Enter the application URL in the address field in the format <u>http://servername:portnumber/pxconfig.</u>
- 3. "servername" is the name of the server that has the PAL installation.
- 4. "portnumber" is the assigned port for the PAL Configuration site, e.g. port 82.
- 5. "pxconfig" is the resource.
- 6. Press Enter.

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



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

ogin:	Administrator
assword:	
	Login
	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	on 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.

	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	
	Save	
	AINS, Inc. IT Experience Database Reposi	tory

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.

ntity Configuration	~		
Catalog(s)			
ntities			
ntity Fields			
ntity Filters			
ashboard Configuration	~		
Jatabase Config			
leader Config			
hange Password			
rror Log			
ign Out			
(IT Experien	AINS, Inc. ce Database Repository		
Open Requests	- Group By 'Reque	ester Type'	

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.

Login : Old Password :	Administrator		
Old Password :			
		*	
New Password :		*	
Confirm Password :		*	

- 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.
- 2. Click Clear to remove the Error Log contents.
- 3. Click Save to store a copy of the Error Log to your local or network drive.

Da	ateTime : 12/12/2013 12:36:03 PM
sy	<pre>/stem.Data.SyntaxErrorException: Syntax error in the expression.</pre>
	at System.Data.ExpressionParser.Parse()
	at System.Data.DataExpressionctor(DataTable table, String expression, Type type)
	at System.Data.DataView.set_RowFilter(String value)
	at AINSChartControl.PortalXpress.filterdata()
Da	ateTime : 12/12/2013 12:36:03 PM
sy	ystem.Data.SyntaxErrorException: Syntax error in the expression.
	at System.Data.ExpressionParser.Parse()
	at System.Data.DataExpressionctor(DataTable table, String expression, Type type)
	at System.Data.Selectctor(DataTable table, String filterExpression, String sort, Data
	at System.Data.DataTable.Select(String filterExpression)
4	at AINSChartControl.PortalXpress.AddSeries(Series TempSeries, String ostr, String sNextB

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

1 Edit catalog 🛛 Add new catalo	9	
Catalog Name	:	PAL
Server Type	:	Sql Server 🗸
Server Name	:	Support-app19
Database Name	:	Support21PAL10
		Windows Authentication
Login	:	sa
Password	:	

- 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 to successfully create a new catalog.

Entity Configuration

Sql Server	PAL	tw-ainsdocs	PALDB	AFXPAgent	False
ql Server	Marcia	tw-ainsdocs	ecasedb	afxagent	False
Sql Server	FOIA	tw-ainsdocs	foiasalesdb	afxagent	False
Edit catalog	Add new catalog :	FOIA			Delete Sav
Edit catalog Catalog Name Server Type	Add new catalog : :	FOIA Sql Server 💌			DeleteSave
Edit catalog Catalog Name Server Type Server Name	Add new catalog \ : :	FOIA Sql Server 💌 tw-ainsdocs			Delete Save
Edit catalog Catalog Name Server Type Server Name Database Name	Add new catalog : : : :	FOIA Sql Server 💌 tw-ainsdocs foiasalesdb			DeleteSave
Edit catalog Catalog Name Server Type Server Name Database Name	Add new catalog : : :	FOLA Sql Server • tw-ainsdocs foiasalesdb Windows Authenticatio			Delete Save

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 catalo	g	
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.
- 4. 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.
- 5. Select the **Primary Key**.

6. Select the **Active** checkbox to enable this entity in the catalog.

Entities	
Select Catalog : FOIA 🔹	
Select Entity	
	<u> </u>
tblActBasedUCategories	
tblActTypes	
tblAddress	
tblAdminCosts	
tblAdministrativeCosts	
tblAlerts	_
	<u> </u>
Edit Enity Add new Entity	
Entity Name : EC_USERS	Add
Primary Key : USER_ID	
Active : 🔽	

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

Entities				
Select Catalog : FO	IA 👻			
Name	Query	Object Name	Primary Key	Active
EC_USERS	Select * From EC_USERS	EC_USERS	USER_ID	True
Edit Enity Add	new Entity			
Edit Enity Add	new Entity			Delete Save
Edit Enity Add Entity Name Primary Key	new Entity : EC_USERS : USER_ID			Delete Save

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.

Edit Enity Add new Entity	
Entity Name	: Open Requests
Primary Key	:
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.

Edit Enity Add new Entity	
Entity Name	: Open Requests
Primary Key	:
Active	: 🗸

- 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.

Name Data USER_ID USER SITE_USER_ID SITE JSER_NAME USER	ibase Column R_ID _USER_ID	Report Column True	Show in Grid	Show in Group By	Show as Category
JSER_ID USER SITE_USER_ID SITE JSER_NAME USER	r_id _user_id	True			
SITE_USER_ID SITE JSER_NAME USEF	_USER_ID		False	False	False
JSER_NAME USEF		False	False	False	False
	R_NAME	True	True	False	False
DS_DOMAIN OS_I	DOMAIN	False	False	False	False
DEFAULT_GROUP_ID DEF	AULT_GROUP_ID	False	False	False	False
S_ACTIVE IS_A	CTIVE	False	False	False	False
OFFICE_ID OFFI	íCE_ID	False	False	False	False
IRST_NAME FIRS	T_NAME	False	False	False	False
MIDDLE_NAME MID	DLE_NAME	False	False	False	False
AST_NAME LAST	I_NAME	False	False	False	False
Edit Field		· • • • • • • • • • • • • • • • • • • •			
eld Name	USER_NAME				Save
eport Column	N.				

- 2. Select a field.
- 3. Select one or more of the following options based on your agency's requirements:
- 4. **Report Column**: Enables the column to be used in the Dashboard report.
- 5. Show in Grid: Displays the column name and data in the grid on the Dashboard report.
- 6. **Show as Category**: Specifies the data for the horizontal axis of the Dashboard chart.
- 7. Show in Group By: Specifies the data for the vertical axis of the Dashboard chart.
- 8. Click Save to retain the settings.
- 9. 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.

Entity Filters				
Catalog : FOIA	•	Entity :	EC_USERS	
Filter Column	Visible Name	Туре	Visible Data	
USER_ID	USER_ID	Range	1-5	
CREATED_DATE	CREATED_DATE	Date	-	
Edit Filter Add New Filter				
Filter Column : USER_ID Filter Type : Range	·			
Filter Value : Add				
Save	Remove			

- 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:
- 6. Values: Displays the data set for a column.
- 7. Range: Sets a specific limit on the values for a column.
- 8. Query: Displays built-in SQL statements for a column.

- 9. Date: Allows users to select a date in the Dashboard application.
- 10. **Logical Operator**: Allows users to select a logical operator in the Dashboard application (e.g., greater than, less than, or equal to).
- 11. 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.

Edit Filter	Add New Filter	
Filter Column :	Please Select	-
Filter Type :		
	Save	

- 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.

