

# Installation Manual

Version 4.3.9



# Formcentric Analytics: Installation Manual

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# 1. Introduction

This manual describes how to install the Formcentric Analytics Backend and Reporting web app.

The first part describes the steps to install the Formcentric Analytics Backend web app and is then followed by the instructions for the Formcentric Analytics Reporting web app. You will also find out which property files need adjusting in order to configure the web applications to your requirements. Both the Backend and the Reporting web applications are provided to you as WAR files and Spring Boot JAR files. We recommend the use of the Spring Boot variant.

The following figure illustrates the overall Formcentric Analytics system and offers an initial introduction to the architecture.



**Figure 1.1. Analytics components**

This section provides a brief description of the individual components.

**Reporting:** The Reporting component provides the user interface that you see in your browser. You use this application to manage Analytics and view the collected data.

**Backend:** The Backend component supplies the data from the database (RDBMS) and Solr (full-text index) to Reporting. This component also receives and stores data from the Formcentric forms submitted.

**Database:** The Database component is used to store the submitted forms. Various common database management systems (RDBMS) are supported, including DB2, MariaDB, Microsoft SQL Server, MySQL, Oracle and PostgreSQL.

**Solr:** The enterprise search engine *Solr* is used for all search operations. Solr lets you search through your data in Analytics quickly and efficiently.

## 2. Backend web app

This chapter provides you with everything you need to know about the setup, installation and administration of the Formcentric Analytics Backend web app. The system requirements for the component are covered as well as the various options available to you for installation. You will also receive insights into how to monitor and manage the application, as well as detailed explanations of the configuration parameters needed both for Formcentric Analytics itself and for the Solr enterprise search engine. This chapter also covers access from the content management system as well as the access privileges required for the database user.

### 2.1. System requirements

This section describes the requirements for operating the Formcentric Analytics Backend web app. Before an initial installation or update of Formcentric Analytics, you can consult the following table to identify the third-party component versions supported.



Not all of the components will be necessary for operation. As one example, RabbitMQ integration is an optional interface that can be added at any time, as required. Further information is available in the corresponding sections.

#### 2.1.1. CMS

Formcentric Analytics is compatible with the FirstSpirit and CoreMedia content systems.

CMS	Status
CoreMedia Content Cloud 10	supported
CoreMedia CMS 9	supported
FirstSpirit 5.2.1902 and later	supported

#### 2.1.2. Databases

Formcentric Analytics supports the following databases.

Database	Status
<b>PostgreSQL</b>	
PostgreSQL 16	supported
PostgreSQL 15	supported
PostgreSQL 14	supported
PostgreSQL 13	supported

<b>Database</b>	<b>Status</b>
PostgreSQL 12	supported
PostgreSQL 11	deprecated
PostgreSQL 10	deprecated
<b>MySQL</b>	
MySQL 8	supported
<b>MariaDB</b>	
MariaDB 11.3	supported
MariaDB 11.2	supported
MariaDB 11.1	supported
MariaDB 11.0	supported
MariaDB 10.x	supported
<b>Oracle</b>	
Oracle Database 21c	supported
Oracle Database 19c	supported
Oracle Database 18c	supported
<b>Microsoft SQL Server</b>	
MSSQL Server 2022	supported
MSSQL Server 2019	supported
MSSQL Server 2017	supported
<b>IBM DB2</b>	
IBM DB2 11.5	supported

### 2.1.3. Java

Formcentric Analytics can be used with the following Java versions. Execution must take place inside a servlet container, version 5.0 or later (e.g. Apache Tomcat 10).

<b>Java</b>	<b>Status</b>
OpenJDK 21	supported
OpenJDK 17	supported

### 2.1.4. Solr

Formcentric Analytics requires Apache Solr. For further information, please see Section 2.5, “Solr configuration”.

<b>Solr</b>	<b>Status</b>
Apache Solr 9.0.x - 9.7.x	supported

<b>Solr</b>	<b>Status</b>
Apache Solr 8.11.x	deprecated

### 2.1.5. RabbitMQ/AMQP

RabbitMQ lets you integrate your own applications with Formcentric Analytics. This is an optional component.

<b>RabbitMQ</b>	<b>Status</b>
RabbitMQ 3.13	supported
RabbitMQ 3.12	supported
RabbitMQ 3.10	deprecated
RabbitMQ 3.9	deprecated

## 2.2. Installation

The Backend web app is supplied in two variants. You can run the Backend with a WAR in a servlet container or as a standalone Spring Boot JAR.

We recommend the use of the Spring Boot JAR. This offers various advantages compared with a WAR deployment. These include the following:

- Both the application and logging are easier to configure (see below)
- Simple updates to new versions, since only the JAR needs to be swapped out
- The JAR is simpler to run in a Docker container
- You do not need to select a compatible servlet container – a suitable tomcat servlet container is included with the JAR.

Each variant is configured slightly differently. The configuration is described below.

### 2.2.1. General

Regardless of the variant used, the following configuration steps must be completed:

#### **Set up a schema**

In your database, create a schema that will be used by the Formcentric Analytics Backend. Ensure that both the schema and the database support UTF-8 encoding, so as to avoid potential losses of data and encoding errors.

If you are using an IBM DB2 database, please also ensure that you are using a table space with a page size of at least 16 kB.

#### **Create a database user**

Create a user for the schema. The user must have permission to execute all CRUD operations. All tables are created automatically when the application first starts and

migrated during updates. Accordingly, the user needs permission to manage tables within the schema.

Full details of the access privileges required can be found in the chapter Section 2.7, “Access rights needed for the database user”.

## Solr

The Backend requires a *Solr* instance. Please see the chapter Section 2.5, “Solr configuration” for details of Solr setup.

### 2.2.2. Spring Boot

You only need to read this section if you want to use the Spring Boot JAR, as recommended.

For a better understanding of the following sections, here is a diagram of the directories and files:

```
.
|-- formcentric-backend-webapp-boot-${project.version}.jar
|-- logback-spring.xml
|-- application.properties
\-- lib/
    \-- your-jdbc-driver-here.jar
```

#### JDBC driver

The Formcentric Analytics Backend web app does not ship with its own database drivers. To ensure a JDBC4 driver is found in the class path, place the driver in a *lib* folder next to the executable JAR.

#### Logging

The Spring Boot variant for the Backend uses Logback. For configuration, we recommended creating a file with the name *logback-spring.xml* alongside the executable JAR and referencing this file in the *application.properties* (see below).

You can find the standard configuration used in the JAR at */BOOT-INF/classes/logback-spring.xml*. We recommend that you use this as the starting-point for your configuration.

A general description of the XML configuration for Logback can be found at the following address: <https://logback.qos.ch/manual/configuration.html>.

#### Configuration

To configure the Backend, we recommend creating an *application.properties* in the same directory as the JAR. Alternatively, you can set the parameters with environment variables. For further Backend configuration details, please see Section 2.4, “Configuration”.

An example of the content in *application.properties* is shown below:

```
# activ database profile:
spring.profiles.active=postgresjson
```



```
#####
## Database settings
#####

schema.name=mwf_analytics
spring.datasource.username=mwf_analytics
spring.datasource.password=Monday123
spring.datasource.driver-class-name=org.postgresql.Driver
spring.datasource.url=jdbc:postgresql://analytics-database:5432/${schema.name}

### Search & Solr Settings
analytics.solr.url=http://analytics-solr:8983/solr/
analytics.solr.snippet.count=50
analytics.solr.collection=mwfanalytics

#####
## You can configure logging the 'Spring Boot way' (shown below) but
## we recommend to go with the logback-spring.xml configuration.
#####

### configuration with an external logback-config-file:
logging.config=file:logback-spring.xml

### logging the spring boot way:
#logging.level.root=INFO
#logging.level.com.formcentric.backend=DEBUG
```

Here are several examples of configuring the Backend with environment variables, which is a popular option for containers:

```
MANAGEMENT_SERVER_PORT=9090
MANAGEMENT_ENDPOINTS_WEB_EXPOSURE_INCLUDE=prometheus,health
ANALYTICS_ACTUATOR_SECURITY_ENABLED=false
```

## Starting the application

The application can be started in the configuration as shown with `java -Dloader.path="lib" -jar formcentric-backend-webapp-boot-4.3.9.jar`.

### 2.2.3. Servlet container

You only need to read this section if you want to run the Backend in a servlet container.

#### JDBC driver

The Formcentric Analytics Backend web app does not ship with its own database drivers. You should either configure your servlet container so that it provides the drivers or you should copy your JDBC 4 driver into the directory `WEB-INF/lib`, so as to add it to the classpath.

#### Logging

You configure logging in the file `WEB-INF/classes/logback-spring.xml`.

A general description of the XML configuration for Logback can be found at the following address: <https://logback.qos.ch/manual/configuration.html>.

## Configuration

To configure the Backend, you can either unpack the WAR file and complete your configuration in `WEB-INF/classes/application-backend.properties` or you can set the parameters with environment variables. For further Backend configuration details, please see Section 2.4, “Configuration”.

## 2.3. Monitoring and management

This section describes the options available to you for monitoring the application and how you configure the corresponding settings.



If the setting `analytics.actuator.security.enabled` (see also Section 2.4, “Configuration”) is active, then the client must authenticate itself in order to access the management endpoints. If the Backend is installed as a Spring Boot JAR (see Section 2.2.2, “Spring Boot”), then we recommend that you set this setting to `false` and instead use `management.server.port` to separate the management server port from the server port. This significantly simplifies the configuration of monitoring systems.

Take care to ensure that unauthorised parties cannot access the port you have set as the `management.server.port`. The best way to do this is to use an upstream proxy that only forwards traffic to the required port (`server.port`).

Analytics uses Spring Boot Actuator. Actuator is a mature management framework that offers a wide range of configuration options. The default Analytics settings are listed below:

**management.endpoints.web.exposure.include:** This specifies which endpoints are made available via `web`. Various endpoints can be published (see also <https://docs.spring.io/spring-boot/docs/3.2.x/reference/html/actuator.html#actuator.endpoints>). The default that Analytics uses out of the box (`info,health,metrics`) is described in the following table:

<code>.../actuator/info</code>	This accesses general information about the application, such as the following, for example: <pre>{   "build": {     "name": "formcentric-backend",     "version": "\${project.version}",     "timestamp": "2023-01-19T09:09:04+0000"   } }</pre>
<code>.../actuator/health</code>	This accesses the health status of the application. This endpoint is typically used by monitoring applications. Normally, the output is as follows:

	<pre>{ "status": "UP" }</pre> <p>If more details need to be shown, you can configure this (see <a href="https://docs.spring.io/spring-boot/docs/3.2.x/reference/html/actuator.html#actuator.endpoints.health">https://docs.spring.io/spring-boot/docs/3.2.x/reference/html/actuator.html#actuator.endpoints.health</a>).</p>
<code>.../actuator/metrics</code>	This can be used to access various metrics for the application (see also Section 2.3.1, “Metrics”).

**management.info.env.enabled:** The default setting is *true*. The general information that is accessed via `.../actuator/info` (see above) is written to the properties during the build.

**management.health.rabbit.enabled:** The default setting is `analytics.rabbitmq.enabled:false`. The health status of RabbitMQ is only evaluated if RabbitMQ is *enabled*.

**management.health.mail.enabled:** The default setting is `mail.sending.enabled:false`. The health status of the mail server is evaluated only if email sending has been activated.

### 2.3.1. Metrics

Spring Boot Actuator provides (`.../actuator/metrics`) very detailed metrics about the application (see <https://docs.spring.io/spring-boot/docs/3.2.x/reference/html/actuator.html#actuator.metrics.endpoint>).

If you access the API without additional parameters, a list of available metrics is returned. If you want to monitor a particular metric, then you append the corresponding name to the URL. In the following example, the memory used metric is being accessed:

```
http://<host>/actuator/metrics/jvm.memory.used
```

Accessing individual values only is also possible, as shown in the following example:

```
http://<host>/actuator/metrics/jvm.memory.used?tag=area:nonheap
```

### 2.3.2. Prometheus

Prometheus is one of the most popular monitoring systems and is supported by Spring Boot Actuator.

The Prometheus (<https://prometheus.io/>) metrics API is not activated by default. Add the value `prometheus` to `management.endpoints.web.exposure.include` to activate it. For more configuration details, please see the following address: <https://docs.spring.io/spring-boot/docs/3.2.x/reference/html/actuator.html#actuator.metrics.export.prometheus>

## 2.4. Configuration

This section explains all of the configuration parameters used with Formcentric Analytics.



If you run the application within FirstSpirit, you can complete your configuration in Server Manager.

### 2.4.1. Database

The following parameters are required for connecting to the database.

**spring.datasource.username:** Here, enter the username for the user account created above.

**spring.datasource.password:** Here, enter the password for the user account created above.

**spring.datasource.driver-class-name:** Here, enter the class name for the JDBC driver that you are using.

**spring.datasource.url:** Here, enter the JDBC URL that is required by your database.

**spring.profiles.include:** You use this context parameter to specify the database configuration that you want to use for the Backend. Possible values are: *postgres*, *mysql*, *mariadb*, *db2*, *mssql* or *oracle*.

### 2.4.2. General configuration

This section includes general configuration parameters for Formcentric Analytics.

**analytics.security.oauth2.clientSecret:** This is a password that you must create and store yourself. Please note that the exact same secret must also be stored in the Reporting web app.

**analytics.security.oauth2.analyticsClientSecret:** This is a password that you must create and store yourself. This enables access to Formcentric Analytics from the CMS (see Section 2.6, "Access from the content management system").

**analytics.security.oauth2.apiTokenValidity:** Optional: number of days for which a self-generated API token is valid. If -1 is entered for this validity period, API tokens do not expire. (Default: 365 )



If the OAuth2 client secrets *analytics.security.oauth2.clientSecret* and *analytics.security.oauth2.analyticsClientSecret* have not been configured, these are generated automatically when the application starts and logging is set to "INFO".

**analytics.actuator.security.enabled:** Optional: Here you can specify whether the Spring Boot Actuator endpoints are secured by OAuth2 or that no authentication is necessary when making a query. (Default: *true* )

**analytics.registration.enabled:** Use this property to activate an option for users to register their own Analytics account on the login page. (Default: *false* )

**export.delimiter:** Use this property to set the character used for separating lists in exported CSV or Excel files. (Default: *;* )

**export.textQualifier:** Use this property to set the text qualifier. This character is used to mark entries as text if they contain the delimiter. (Default: *"* )

**automation.cron:** A cron expression that schedules the automation jobs for Form-centric Analytics. The default configuration executes these jobs overnight at 01:00. The cron expression is interpreted in UTC.

**automation.enabled:** Use this property to activate or deactivate the execution of automation jobs. (Default: *true* )

**analytics.revisions.enabled:** Use this property to activate or deactivate revisions to form entries. (Default: *true* )

### 2.4.3. Send as Email

The following parameters configure sending mail from Formcentric Analytics. As mail sending is restricted to functions related to user management (activation link, forgotten password), a mail server is not mandatory when using an external directory service and can therefore be deactivated.

**mail.sending.enabled:** Use this property to activate or deactivate the sending of email from Formcentric Analytics. (Default: *true* )

**mail.user:** The account used by Formcentric Analytics to authenticate with the mail server.

**mail.password:** The password for the mail server user.

**mail.host:** The mail server host.

**mail.port:** The mail server port.

**mail.properties.\*:** All other JavaMail properties can be configured by using the *mail.properties* prefix.

**mail.properties.transport.protocol:** The mail server transport protocol.

**mail.properties.smtp.auth:** Use this property to activate/deactivate use of the AUTH command by the mail user.

**mail.properties.smtp.starttls.enable:** Set this property if STARTTLS must be used.

**mail.properties.smtp.socketFactory.class:** Java class to set up SMTP sockets. Remove this property if plaintext connections are used.

**mail.properties.debug:** Use this property to activate/deactivate extra debugging output while mail is being sent.

**mail.from.address:** Here, you can configure the email address that Formcentric Analytics uses to send its email.

**mail.from.name:** This property is used to set the name that is shown as the sender for all mail sent by Formcentric Analytics.

**mail.reporting.url:** Here, enter the URL to the Reporting component within Formcentric Analytics.

**mail.language:** Configure this property to set the language used for sending email.

#### 2.4.4. LDAP and Active Directory integration (optional)

The parameters listed below are used to integrate a Lightweight Directory Access Protocol (LDAP) or Active Directory server with Formcentric Analytics for user authentication. The rest of this documentation may use just "LDAP" but this always means "and Active Directory" if not explicitly excluded.

For external users to be able to log in, the user must be in at least one LDAP group that is known to Formcentric Analytics. Administrators therefore have the option of synchronising LDAP groups as part of system management. If all login attempts fail, this is a common source of errors and should be repeated. In group management, you can assign permissions and roles to an LDAP group, so as to make all members of a group administrators, for example.

If you have deployed LDAP over SSL (LDAPs), make sure that you add the LDAP certificate to your TrustStore.

Configuration parameters for the server: The server parameters use the prefix *analytics.ldap*. This prefix is also used for the Active Directory server.

**spring.profiles.include:** Extend this parameter by specifying a Spring profile if you want to use an external user directory (e.g. *spring.profiles.include=db2,activeDirectory*). To do so, select one of the following profiles: *ldap*, *activeDirectory*.

**analytics.ldap.userDn:** Username for access to the LDAP server.

**analytics.ldap.password:** Password for access to the LDAP server.

**analytics.ldap.url:** URL of the LDAP server.

**analytics.ldap.baseDn:** The base DN of the user directory from which all users and groups can be reached (e.g. *dc=mydomain,dc=com*).

**analytics.ldap.subdomainDNs[0..n]:** Optional: other subdomain DN's of the user directory from which all users and groups can be reached (e.g. *dc=subdomain1,dc=mydomain,dc=com*). For each additional subdomain, a new entry with the fully qualified DN of the subdomain must be added (e.g. *analytics.ldap.subdomainDNs[1]=dc=subdomain2,dc=mydomain,dc=com*)

**analytics.ldap.domainLabel:** Human-readable name of the domain used as a default for the user during registration.

**analytics.ldap.userSearchBase:** Specifies an object in the directory tree under which the user search is executed (e.g. *ou=people* for LDAP or *cn=users* for Active Directory).

**analytics.ldap.userSearchFilter:** Specifies an LDAP search filter to apply to the user search (which is run using the specified search base) (e.g. `(uid={0})` for LDAP or `(samaccountname={0})` for Active Directory).

The placeholder `{0}` is replaced with the username entered before executing the search.

A general description of the search filter syntax is available from the following link:<http://www.faqs.org/rfcs/rfc2254.html>.

**analytics.ldap.userDnPattern:** Pattern that is used to generate the distinguished name (DN) for a user. You only need to specify this parameter if you have selected the LDAP directory type (e.g. `uid={0},ou=people` ).

**analytics.ldap.mailAttribute:** Name of the user object attribute field in which the email address can be found. The email address is saved in the Analytics database.

**analytics.ldap.groupSearchBase:** Specifies an object in the directory tree under which the group search is executed (e.g. `DC=company,DC=com` for LDAP or `cn=users` for Active Directory).

**analytics.ldap.groupSearchFilter:** Specifies an LDAP search filter to apply to the group search that is run using the specified search base (e.g. `(objectclass=groupOfUniqueNames)` for LDAP or `(objectclass=group)` for Active Directory).

**analytics.ldap.groupsImportFilter:** All of the groups for which specific permissions will be granted within Formcentric Analytics must first be imported into the internal user directory used by Formcentric Analytics. You can use the `group import filter` field to specify an LDAP search filter that will be applied in order to select the LDAP groups to import from the list of available groups (e.g. `(cn=*AnalyticsUsers*)` ). If you do not enter anything into this field, then all of the groups identified by the LDAP search filter field `search filter for groups` will be imported.

**analytics.ldap.userGroupsSearchFilter:** This LDAP search filter is used to identify the groups in which a user is a member. You only need to specify this parameter if you have selected the LDAP directory type (e.g. `(memberUid={0})` ). The placeholder `{0}` is replaced with the username entered before executing the search.

**analytics.ldap.removeExternalUsers.enabled:** Here you can activate (`true`) or deactivate (`false`) the automatic removal of LDAP/AD users from Analytics.

**analytics.ldap.removeExternalUsers.cron:** Cron expression that controls when LDAP/AD users are removed from Analytics. Users are removed only if they can no longer be found in LDAP/AD.

**analytics.ldap.adBindDomainFromBaseDn:** Only affects Active Directory: Here you can specify whether the user's `domain` is determined (`true`) or is not determined (`false`) during login from the `analytics.ldap.baseDn` parameter. If you do not set the parameter, the default is `true`.

**analytics.ldap.adBindDomain:** Only affects Active Directory: Here you can specify a `domain` that is always to be used if `analytics.ldap.adBindDomainFromBaseDn` is set

to *false*. If you do not set this parameter, the user must specify their domain themselves during login.

### 2.4.5. RabbitMQ/AMQP (optional)

RabbitMQ lets you integrate your own applications with Formcentric Analytics.

**analytics.rabbitmq.enabled:** Use this property to activate (*true*) or deactivate (*false*) RabbitMQ integration.

**analytics.rabbitmq.topic.enabled:** Use this property to activate (*true*) or deactivate (*false*) the topic exchange type.

**analytics.rabbitmq.headers.enabled:** Use this property to activate (*true*) or deactivate (*false*) the headers exchange type.

**spring.rabbitmq.host:** Use this property to configure the RabbitMQ host. All of the configuration parameters supported by Spring RabbitMQ are also available here.

**spring.rabbitmq.port:** Use this property to configure the RabbitMQ port. All of the configuration parameters supported by Spring RabbitMQ are also available here.

**spring.rabbitmq.username:** Use this property to configure the RabbitMQ username. All of the configuration parameters supported by Spring RabbitMQ are also available here.

**spring.rabbitmq.password:** Use this property to configure the RabbitMQ password. All of the configuration parameters supported by Spring RabbitMQ are also available here.

### 2.4.6. Request ID

Formcentric Analytics can accept a request ID from the http request headers and output this to the log. This enables the tracking of a request across multiple log entries. To do this, Formcentric Analytics sets a variable *REQ-ID* in the mapped diagnostic context (MDC) of the logging framework used (see Section 2.2.2, “Spring Boot” and Section 2.2.3, “Servlet container”).

You use the following parameters to configure this functionality.

**analytics.http.requestId.enabled:** You use this parameter to activate (*true*) or deactivate (*false*) this function. This functionality is activated by default.

**analytics.http.requestId.headerName:** You use this parameter to configure the name of the http header from which Formcentric Analytics accepts the request ID. The default value here is *x-request-id*.

**analytics.http.requestId.internalRequestIdPrefix:** If the request does not contain a request ID, Formcentric Analytics generates a request ID automatically. You use this parameter to generate the prefix for this automatically generated ID, which lets you distinguish IDs in the log more easily.



**analytics.http.requestId.externalRequestIdPrefix:** Formcentric Analytics can set a prefix in front of an external request ID (the ID from the request header) so as to make it clear in the log that this ID was not generated by Formcentric Analytics.

## 2.4.7. Encrypting configuration parameters

In the default configuration, sensitive data in configuration files is stored in plaintext. In the event of a security breach, attackers would gain access to valid login credentials. For this reason, you are given the option of storing passwords in an encrypted format. In this case, passwords are decrypted only when the application starts, using the stored encryption password. The password to be used for encryption must be stored in an environment variable before the application starts. The default environment variable used by Webforms for encryption is *MWF\_ENCRYPTION\_PASSWORD*.

To encrypt or decrypt values, a command line tool is available, which can be accessed with the command

```
mvn dependency:copy -Dartifact=com.formcentric:encryption-cli:2.0:jar
-DoutputDirectory=.
```

. The tool either encrypts or decrypts a value when executed.

```
java -jar encryption-cli-1.0.jar -p 'encryptionPassword'
-e 'toEncrypt'
```

If run *without* parameters, the tool prompts the user for the password and the values to be encrypted/decrypted. Please note that the parameters must be entered in single quotation marks. The tool can be run with the following parameters:

Parameter	Description
-p or --encryptionPassword	Specifies the password to be used for encryption or decryption.
-d or --decrypt	Decrypts the value given after this parameter
-e or --encrypt	Encrypts the value given after this parameter
-? or --help	Shows the help file for the tool.

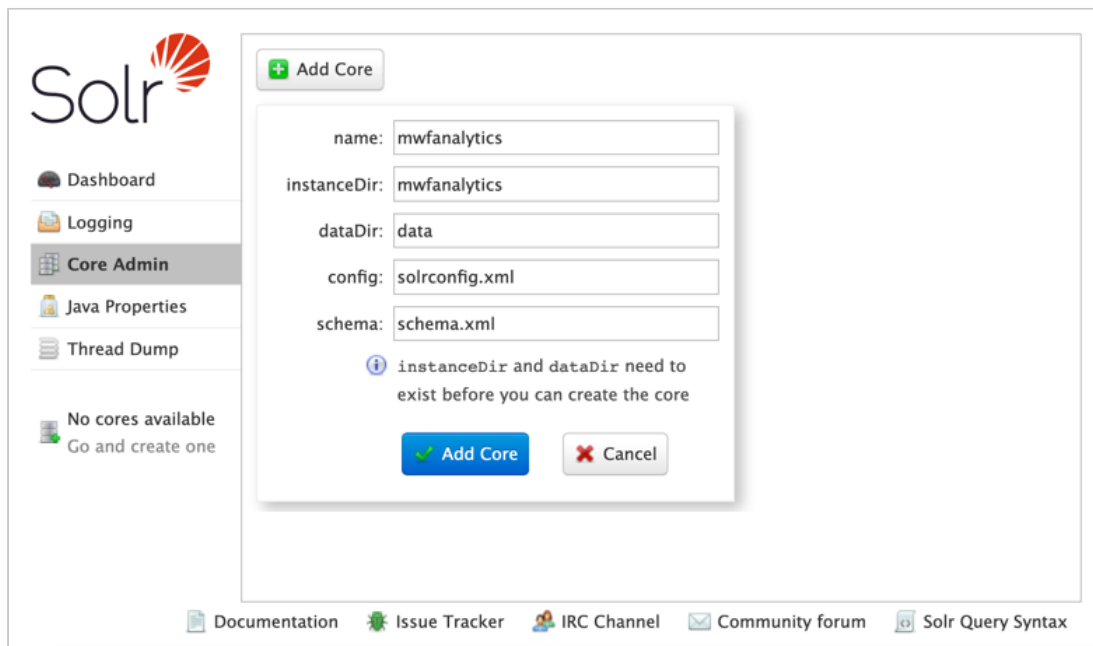
## 2.5. Solr configuration

The enterprise search engine *Solr* is required for all search operations. The following section explains how you run Solr.

### 2.5.1. Solr installation

The Solr search engine is run as a standalone application. For information about installing and configuring Solr, please see the product page <http://lucene.apache.org/solr/>.

To use the external Solr instance with Formcentric Analytics, you first need to create a new core with the name *mwfanalytics*. You can also specify the name of the core with *analytics.solr.collection*.



**Figure 2.1. Core administration in the Solr administration interface**

You can download the required configuration files *solrconfig.xml* and *schema.xml* from our Maven server.

```
mvn dependency:copy \ -Dartifact=com.formcentric.analytics:formcentric-backend-solr-config:4.3.9:t
```

Now enter the URL of the Solr server into the file *WEB-INF/classes/application-backend.properties* for the parameter *analytics.solr.url*.

Example: *analytics.solr.url=http://localhost:8983/solr/*

## 2.5.2. General settings

**analytics.solr.user:** You can specify the username for connecting to Solr here.

**analytics.solr.pass:** You can specify the password for connecting to Solr here.

**analytics.solr.snippet.count:** Maximum number of matches that should be determined for a search result.

**feeder.enabled:** Activates or deactivates the feeder.

**feeder.id:** Assign a unique ID to the feeder. An arbitrary character string can be used here. If multiple Backend applications are being run in parallel, the feeder IDs for the various Backend applications must be unique.

Example: *feeder.id=57a62821-1165-4c56-a56d-93315d1b0aeb*



Please note: running an embedded instance of Solr within the Analytics Backend application is no longer a supported option.

## 2.6. Access from the content management system

To access the Backend web app, an *access token* is required. The token is generated by using the *analytics.security.oauth2.analyticsClientSecret* (see Section 2.2, “Installation”).

Three methods are available for generating the token:

### 1. Backend web app

The first method requires the use of a configured and operational Backend system. Only the value of the *access\_token* is required from the server response.

```
curl --user webforms-webapp-client:${WEBFORMS_CLIENT_SECRET}
      ${BACKEND_HOST}/oauth/token -d grant_type=client_credentials
```

Result:

```
{"access_token":"uFDXjCR+pWL+8iQIigJr9iFLcQm04G7NILrrY+bWcHg=", ...}
```

### 2. Reporting web app

The second method requires the Backend web app and the Reporting web app. Administrators can configure the *webforms-webapp-client* in the Reporting web app system overview in the same way as for API accesses they have set up themselves, and request or invalidate tokens. For a detailed guide, please see the user manual for the Reporting web app.

### 3. Automatic generation in the CMS

Instead of using a token generated at Backend web app runtime, you can also pass the *client secret* to the Formcentric CMS extension. In this case, the *BackendApiClient* automatically requests a token when first accessing Formcentric Analytics.

## 2.7. Access rights needed for the database user

The database user requires the permission to manage tables within the schema, since all tables are created automatically when the application first starts and also migrated during updates.

Alongside CRUD operations (*INSERT*, *SELECT*, *UPDATE*, *DELETE*), permissions for DDL operations are also required. The database user must be able to execute the following commands: *CREATE TABLE*, *ALTER TABLE*, *DROP TABLE*, *CREATE INDEX*, *DROP INDEX*, *CREATE PROCEDURE*, *DROP PROCEDURE*. The database user must also be authorised to execute database procedures.

Some databases work with sequences (DB2, Oracle, Postgres, MS SQL). For these databases, the database user must also be authorised to create and delete sequences (*CREATE SEQUENCE, DROP SEQUENCE*).

### 2.7.1. DB2

Tables must be reorganised in DB2 while the database schema is being migrated. To do this, the database user must be able to perform the following operation: *call SYSPROC.ADMIN\_CMD('REORG TABLE <table>');*

### 2.7.2. Oracle

With Oracle, objects are placed in a recycle bin for some operations. This recycle bin is emptied with the following command: *purge recyclebin;*

During the schema migration, PL/SQL code must be executed. The database user must be able to execute code as shown below:

```
-- alter table MWF_FORM_SEARCH_NUMBER drop column ID if exist
DECLARE
    cnt integer;
BEGIN
    SELECT COUNT(*)
    INTO cnt
    FROM ALL_TAB_COLUMNS
    WHERE table_name = 'MWF_FORM_SEARCH_NUMBER'
        AND column_name = 'ID';

    IF (cnt = 1) THEN
        EXECUTE IMMEDIATE
            'alter table MWF_FORM_SEARCH_NUMBER drop column ID';
    END IF;
END;
```

### 2.7.3. MS-SQL

During the schema migration, Transact-SQL code must be executed. The database user must be able to execute code as shown below:

```
declare @var1 AS nvarchar(256);
select @var1 = TC.CONSTRAINT_NAME
from INFORMATION_SCHEMA.TABLE_CONSTRAINTS TC
inner join INFORMATION_SCHEMA.CONSTRAINT_COLUMN_USAGE CC on
    TC.CONSTRAINT_NAME = CC.CONSTRAINT_NAME
where CC.COLUMN_NAME = 'attachment_id'
    and CC.TABLE_NAME = 'mwf_form_attachments'
    and TC.CONSTRAINT_TYPE = 'PRIMARY KEY'
execute ('ALTER TABLE mwf_form_attachments DROP CONSTRAINT ' + @var1);
alter table mwf_form_attachments
    add constraint form_attachments_pk primary key (attachment_id, record_id);
```

Or:

```

declare @sql nvarchar(200)
declare @constName nvarchar(100)
set @constName = (
    select top 1 TC.CONSTRAINT_NAME
    from INFORMATION_SCHEMA.TABLE_CONSTRAINTS TC
    inner join INFORMATION_SCHEMA.CONSTRAINT_COLUMN_USAGE CC on
        TC.CONSTRAINT_NAME = CC.CONSTRAINT_NAME
    where TC.CONSTRAINT_TYPE = 'UNIQUE'
    and COLUMN_NAME='email'
    and TC.TABLE_NAME='mwf_user')
print @constName
set @sql = 'ALTER TABLE mwf_user DROP CONSTRAINT '+ @constName
Exec sp_executesql @sql;

```

## 2.7.4. Postgres

During the schema migration, PL/SQL code must be executed. The database user must be able to execute code as shown below:

```

DO $$DECLARE r record;
BEGIN
    FOR r IN
        SELECT
            tc.constraint_name, tc.table_name
        FROM
            information_schema.table_constraints AS tc
            JOIN information_schema.key_column_usage AS kcu
                ON tc.constraint_name = kcu.constraint_name
            JOIN information_schema.constraint_column_usage AS ccu
                ON ccu.constraint_name = tc.constraint_name
        WHERE constraint_type = 'UNIQUE'
            AND tc.table_name='mwf_user'
            AND (ccu.column_name='user_name' OR ccu.column_name='email')
    LOOP
        EXECUTE 'ALTER TABLE ' || quote_ident(r.table_name) ||
            ' DROP CONSTRAINT ' || quote_ident(r.constraint_name) ||
            ';;';
    END LOOP;
END$$;

```

## 3. Reporting web app

This chapter provides you with comprehensive information about the system and browser requirements, as well as a detailed guide to the installation and configuration of the Formcentric Analytics Reporting web app.

### 3.1. System requirements

- Formcentric Analytics Backend 4.3.9

#### 3.1.1. Java

Formcentric Analytics can be used with the following Java versions. Execution must take place inside a servlet container, version 5.0 or later (e.g. Apache Tomcat 10). Alternatively, you can execute the Spring Boot JAR (recommended).

Java	Status
OpenJDK 21	supported
OpenJDK 17	supported

### 3.2. Browser requirements

- Google Chrome (latest version)
- Mozilla Firefox (latest version or ESR)
- Microsoft Edge (latest version)

### 3.3. Installation

The Reporting web app is supplied in two variants. You can run Reporting with a WAR in a servlet container or as a standalone Spring Boot JAR.

We recommend the use of the Spring Boot JAR. This offers various advantages compared with a WAR deployment. These include the following:

- Both the application and logging are easier to configure (see below)
- Simple updates to new versions, since only the JAR needs to be swapped out
- The JAR is simpler to run in a Docker container
- You do not need to select a compatible servlet container – a suitable tomcat servlet container is included with the JAR.

You can verify that the installation has been successful by accessing the Reporting web app and logging in. After an initial installation, the username is *admin* and the password is *admin*.

### 3.3.1. Spring Boot

You only need to read this section if you want to use the Spring Boot JAR, as recommended.

#### Logging

The Spring Boot variant for Reporting uses Logback. For configuration, we recommended creating a file with the name *logback-spring.xml* alongside the executable JAR and referencing this file in the *application.properties* (see below).

You can find the standard configuration used in the JAR at */BOOT-INF/classes/logback-spring.xml*. We recommend that you use this as the starting-point for your configuration.

A general description of the XML configuration for Logback can be found at the following address: <https://logback.qos.ch/manual/configuration.html>.

#### Configuration

To configure Reporting, we recommend creating an *application.properties* in the same directory as the JAR. Alternatively, you can set the parameters with environment variables. For further Backend configuration details, please see Section 2.4, “Configuration”.

An example of the content in *application.properties* is shown below:

```
### Backend Connection Settings
analytics.backend.url=http://analytics-backend:8080/

#####
## You can configure logging the 'Spring Boot way' (shown below) but
## we recommend to go with the logback-spring.xml configuration.
#####

logging.config=file:logback-spring.xml

### logging the spring boot way:
#logging.level.root=INFO
#logging.level.com.formcentric=DEBUG
```

Here are several examples of configuring the Backend with environment variables, which is a popular option for containers:

```
MANAGEMENT_SERVER_PORT=9090
MANAGEMENT_ENDPOINTS_WEB_EXPOSURE_INCLUDE=prometheus,health
ANALYTICS_ACTUATOR_SECURITY_ENABLED=false
```

### 3.3.2. Servlet container

You only need to read this section if you want to run the backend in a servlet container.

## Logging

You configure logging in the file `WEB-INF/classes/logback-spring.xml`.

A general description of the XML configuration for Logback can be found at the following address: <https://logback.qos.ch/manual/configuration.html>.

## Configuration

To configure Reporting, you can either unpack the WAR file and complete your configuration in `WEB-INF/classes/application-reporting.properties` or you can set the parameters with environment variables. For further Backend configuration details, please see Section 2.4, “Configuration”.

## 3.4. Configuration

This section explains all of the configuration parameters used with Formcentric Analytics.



If you run the application within FirstSpirit, you can complete your configuration in Server Manager.

### **analytics.backend.url**

URL of the Formcentric Analytics backend already deployed.

### **analytics.security.oauth2.clientSecret**

Here, you must enter the same password that you used before during the Backend configuration.

### 3.4.1. Request ID

Formcentric Analytics can accept a request ID from the http request headers and output this to the log. This enables the tracking of a request across multiple log entries. To do this, Formcentric Analytics sets a variable `REQ-ID` in the mapped diagnostic context (MDC) of the logging framework used (see Section 3.3.1, “Spring Boot” and Section 3.3.2, “Servlet container”).

You use the following parameters to configure this functionality.

**analytics.http.requestId.enabled:** You use this parameter to activate (*true*) or deactivate (*false*) this function. This functionality is activated by default.

**analytics.http.requestId.headerName:** You use this parameter to configure the name of the http header from which Formcentric Analytics accepts the request ID. The default value here is `x-request-id`.

**analytics.http.requestId.internalRequestIdPrefix:** If the request does not contain a request ID, Formcentric Analytics generates a request ID automatically. You use this parameter to generate the prefix for this automatically generated ID, which lets you distinguish IDs in the log more easily.



**analytics.http.requestId.externalRequestIdPrefix:** Formcentric Analytics can set a prefix in front of an external request ID (the ID from the request header) so as to make it clear in the log that this ID was not generated by Formcentric Analytics.

### 3.4.2. Encrypting configuration parameters

In the default configuration, sensitive data in configuration files is stored in plaintext. In the event of a security breach, attackers would gain access to valid login credentials. For this reason, you are given the option of storing passwords in an encrypted format. In this case, passwords are decrypted only when the application starts, using the stored encryption password. The password to be used for encryption must be stored in an environment variable before the application starts. The default environment variable used by Webforms for encryption is *MWF\_ENCRYPTION\_PASSWORD*.

To encrypt or decrypt values, a command line tool is available, which can be accessed with the command

```
mvn dependency:copy -Dartifact=com.formcentric:encryption-cli:2.0:jar
-DoutputDirectory=.
```

. The tool either encrypts or decrypts a value when executed.

```
java -jar encryption-cli-1.0.jar -p 'encryptionPassword'
-e 'toEncrypt'
```

If run *without* parameters, the tool prompts the user for the password and the values to be encrypted/decrypted. Please note that the parameters must be entered in single quotation marks. The tool can be run with the following parameters:

Parameter	Description
-p or --encryptionPassword	Specifies the password to be used for encryption or decryption.
-d or --decrypt	Decrypts the value given after this parameter.
-e or --encrypt	Encrypts the value given after this parameter.
-? or --help	Shows the help file for the tool.