

# Monarch Server Report Mining Edition

**Version 14.1**



**[Connection to Content Management  
Systems]**



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*Monarch Server Version 14.1 RMS Connection to Content Management Systems*

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# Introduction

Monarch Server Report Mining Edition (RMS) can be used through an initiation request.

The initiation request can be accomplished in several steps.

1. Send the first request using the HTTP POST method to initialize the RMS session. The result of this request is a unique session ticket.
2. Upload the necessary reports using the HTTP POST method.
3. Submit session ticket in a client browser to analyze the uploaded reports.



# Entry Point for Initiation Request

The initiation request is sent to the RMS entry point. The URL of the entry point is:

```
http://<host name>:<port number>/<RMS virtual
directory>/TestFramework/TestAPI
```

where

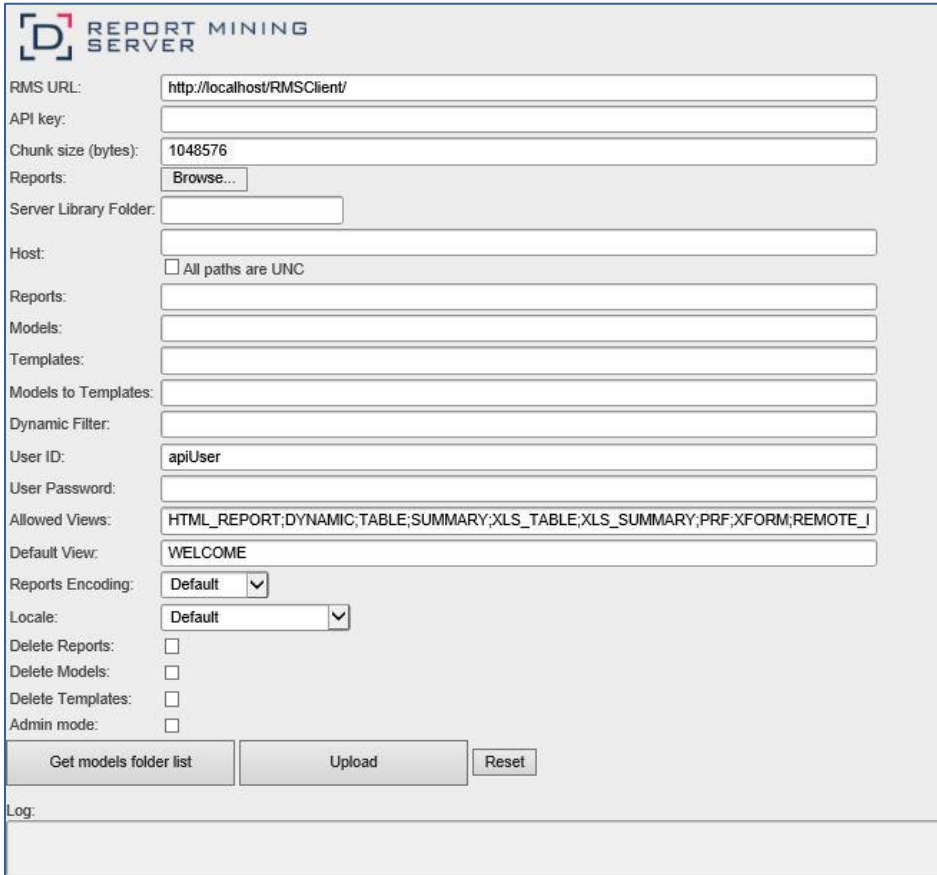
- ❑ <host name> is the name of the computer in which the target RMS WebServer component is installed
- ❑ <port number> is the port number on which the RMS WebServer is listening
- ❑ <RMS virtual directory> is the virtual directory in which the application is installed (**RMSCient** by default)



# Report Mining Edition Test API

RMS recognizes a request and then queries the report, model, and template data to determine the user's available views. The page with the appropriate request parameters will be displayed.

The RMS Test API page contains the following items:



The screenshot shows the 'REPORT MINING SERVER' configuration interface. It includes the following fields and controls:

- RMS URL:**
- API key:**
- Chunk size (bytes):**
- Reports:**
- Server Library Folder:**
- Host:**
- All paths are UNC
- Reports:**
- Models:**
- Templates:**
- Models to Templates:**
- Dynamic Filter:**
- User ID:**
- User Password:**
- Allowed Views:**
- Default View:**
- Reports Encoding:**
- Locale:**
- Delete Reports:**
- Delete Models:**
- Delete Templates:**
- Admin mode:**

Buttons:

Log:

- ❑ **RMS URL field:** URL: `http://<host name>:<port number>/<RMS virtual directory>`,  
where
  - `<host name>` is the name of the computer in which the target RMS WebServer component is installed
  - `<port number>` is the port number on which the RMS WebServer is listening
  - `<RMS virtual directory>` is the virtual directory in which the application is installed (**RMSCClient** by default)
- ❑ **API key field:** API key, which is generated in MSAdmin (**System Settings -> System Preferences -> RMS Settings -> RMS API Keys**).



## NOTES

The value of the key is generated automatically when a new API key is added.



- ❑ **Chunk size (bytes) field:** Parts size on which a report is divided when loading.
- ❑ **Reports field with Browse button:** Click this button to select one or more reports from the file system.
- ❑ **Server Library Folder field:** Name of the existing Server Library Folder that contains models; click the **Get models folder list** button then select the name of the folder from the drop-down list.
- ❑ **Host field:** The name of the host where the report is located. The default value is the data retrieved by the initiation request to the server.



## NOTES

This field is mandatory if you will use the Reports, Models, Templates, and Models to Templates fields.



- ❑ **All paths are UNC check box:** Select this check box if the report host is not set so that the report path is equally accessible with any Exporter.
- ❑ **Reports field:** Enter a complete resolvable path to the source report(s) or a folder which contains reports.



## NOTES

This field is not mandatory.



The default value is the data retrieved by the initiation request to the server. The data are added automatically to the WebServer during installation. The location is `http://<host name>:<port number>/<RMS virtual directory>/TestPage/Files,`

where

- `<host name>` is the name of the computer in which the target RMS WebServer component is installed
- `<port number>` is the port number on which the RMS WebServer is listening
- `<RMS virtual directory>` is the virtual directory in which the application is installed (**RMSCClient** by default)







## NOTES

RMS supports the following formats for this parameter:

- Path to a single report
- List of paths to the reports. The list items should be separated with a semicolon (;):  
<report\_1\_path>;<report\_2\_path>;... <report\_n\_path>
- Path to the folder that contains reports (only .prn, .pdf, .xps files are retrieved)



- **Models field:** A complete resolvable path to the source models (non-template-bound), a folder with templates, or a model Definition ID.



## NOTES

This field is not mandatory.



The default value is the data retrieved by the initiation request to the server. The data are added automatically to the WebServer during installation. The location is `http://<host name>:<port number>/<RMS virtual directory>/TestPage/Files,`

where

- <host name> is the name of the computer where the target RMS WebServer component is installed.
- <port number> is the port number on which the RMS WebServer is listening.
- <RMS virtual directory> is the virtual directory in which the application is installed (**RMSCient** by default)



## NOTES

RMS supports the following formats for this parameter:

- Path to a single model
- List of paths to the models. The list items should be separated with a semicolon (;):  
<model\_1\_path>;<model\_2\_path>;... <model\_n\_path>
- Path to the folder that contains models
- Model Definition ID. The model object is available to the user (if the user has the necessary access permissions)

This parameter should list only table/summary models and not template-bound models.



- **Templates field:** Complete resolvable path to the source template(s) or a template Definition ID.



## NOTES

This field is not mandatory.

The default value is the data retrieved by the initiation request to the server. The data are added automatically to the WebServer during installation. The location is `http://<host name>:<port number>/<RMS virtual directory>/TestPage/Files,`

where

- `<host name>` is the name of the computer in which the target RMS WebServer component is installed
- `<port number>` is the port number on which the RMS WebServer is listening
- `<RMS virtual directory>` is the virtual directory in which the application installed (**RMSClient** by default)



## NOTES

RMS supports the following formats for this parameter:

- Path to a single template
- List of paths to the templates. The list items should be separated with a semicolon (;): `<template_1_path>;<template_2_path>;... <template_n_path>`
- Path to the folder that contains templates (only .xls, .xlsx files are retrieved)
- Template Definition ID. The template object is available to the user (if the user has the necessary access permissions)

If this parameter is absent, XFORM data views will not be available.

- **Models to Templates field:** The model-to-template association. Model and Template Definition IDs can be used as input here instead of paths.

The default value is data retrieved by the initiation request to the server. The data are added automatically to the WebServer during installation. The location is at `http://<host name>:<port number>/<RMS virtual directory>/TestPage/Files,`

where

- `<host name>` is the name of the computer in which the target RMS WebServer component is installed



- <port number> is the port number on which the RMS WebServer is listening
- <RMS virtual directory> is the virtual directory in which the application is installed (**RMSCient** by default).



## NOTES

The list items should be separated with a semicolon (;):  
 <template\_1\_path>;<model\_1\_path>;<template\_2\_path>;  
 <model\_2\_path>...<template\_n\_path>;<model\_n\_path>

If this parameter is absent, XFORM data views will not be available.



- **Dynamic Filter field:** The initial dynamic filter for Data, Summary, and ES Style Views.



## NOTES

It consists of a value pair of column name and filter value:  
 FILTERCOLUMN=[ColumnName];FILTERVALUE=[FilterValue];FILTEROPERATOR=[EQ,NEQ,GT,LT,GTE,LTE,CONTAINS,STARTSWITH,ENDSWITH]

The date format for the filter value is YYYYMMDD.



- **User ID field:** Entry for user identifier.



## NOTES

This identifier used for getting user preferences and for authentication.



- **User Password field:** Entry for user password.



## NOTES

If a password is not provided, a new dynamic user is created in the RMS DB. This user is assigned to the user group that is specified in the web.config file of the RMS Client. If a password is provided, then in order to login to RMS Client the user with these USER\_ID and PASSWORD should already exist and has the RMS User privilege assigned.

- **Allowed Views field:** Specifies the data views that will be available for the user. By default, all views are listed.



## NOTES

The list items should be separated with a semicolon (;):  
<data\_view\_1 >; < data\_view\_2>; ... < data\_view\_n>,  
where <data\_view\_n> is one of the following constants:

- HTML\_REPORT
- DYNAMIC
- TABLE
- SUMMARY
- XLS\_TABLE
- XLS\_SUMMARY
- PRF
- XFORM
- REMOTE\_PORTLETS

- **Default View field:** Specifies the name of the view to be shown initially. The default value is **Welcome**.



## NOTES

The view name can be one of the values permitted for the **Allowed Views** parameter. If no view name is specified, My Home page will be displayed.

- **Report Encoding field:** Encoding type of incoming reports from the following:
  - ANSI
  - ASCII
  - UTF8
  - UTF16LE
  - UTF16BE





## NOTES

If the value is not defined, the default encoding type specified by the admin will be used.



- ❑ **Locale field:** The locale to be used in the current session. It can be one of the following:
  - English
  - Deutsch (German – Germany)
  - Français (French – France)



## NOTES

If the value is not defined, the default locale specified by the admin will be used.



- ❑ **Delete Reports check box:** Removes source report after user session ends.



## NOTES

The reports selected via the **Choose Files** button will not be removed.



- ❑ **Delete Models check box:** Removes source models after user session ends.



## NOTES

The models from the Server Library Folder will not be removed.



- ❑ **Delete Templates check box:** Removes source templates after user session ends.
- ❑ **Admin mode check box:** Allows uploading of shared models and deleting of models.
- ❑ **Get models folder list button:** Click this button to get a list of folders with models from the Server Library.
- ❑ **Upload button:** Click this button to get a URL built for the connection to the Monarch Server RMS. The built URL is available via the link that appears beside this button.
- ❑ **Log field disabled by default:** Displays all errors and downloaded files.

# Report Mining Edition API Configuration

You can change the settings of RMS API in the **config.xml** file.

The RMS Content Host involves the following settings in this file:

```
❑ <appSettings>
...
  <add key="ApiUploadStoragePath" value="" />
...
</appSettings>
```

Enter the path in which the temporary folder will be created with the uploaded reports. Path by default is \\<host name>\C:\Windows\Temp\DatawatchRmsApiUploadStorage.



## NOTES

The folder with the uploaded reports will be removed after the session ends.

```
❑ <appSettings>
...
  <add key="ApiUploadSessionTimeOut" value="01:00:00" />
...
</appSettings>
```

Enter the time after which the session will finish.



## NOTES

The resulting link will be not available after the session ends.

# API Reference

The following is a complete reference of methods supported by the Report Mining Edition API.

## Server Library folder

Get the Server Library folder list.

### GET METHOD

`http://localhost/RMSClient/api/v1/folder/list`

#### Parameters:

- ❑ `apiKey` (string) – RMS API Key (should be created in System Settings)
- ❑ `objectTypes` (string) – List of object types separated by “;”. If set, only the folders containing objects of these types will be returned. The possible types are
  - MODEL
  - GROUP
  - TEMPLATE

#### Response:

- ❑ `Id` (int) – folder Id
- ❑ `Name` (string) – folder name
- ❑ `Description` (string) – folder description
- ❑ `ParentId` (int) – parent folder id



# Existence of Server Library objects

Check if the Server Library folder has objects of the aforementioned types.

## GET METHOD

`http://localhost/RMSClient/api/v1/folder/hasobjects`

### Parameters:

- ❑ `apiKey` (string) – RMS API Key (should be created in System Settings)
- ❑ `folderName` (string) – Server Library folder name
- ❑ `objectTypes` (string) – List of object types separated by “;”.

### Response:

- ❑ `HasObjects` (Boolean) – true/false

# Starting of file upload session

Start file upload session.

## POST METHOD

`http://localhost/RMSClient/api/v1/upload/beginsession`

### Parameter:

- ❑ `apiKey` (string) – RMS API Key (should be created in System Settings)

### Response:

- ❑ `TicketId` (string) – Ticket ID used to add files



# File uploading

Initiate an upload of a new file.

## POST METHOD

`http://localhost/RMSClient/api/v1/upload/file`

### Parameters:

- ❑ FileName (string) – File name
- ❑ TicketId (string) – Ticket ID

### Response:

- ❑ FileId (string) – File ID used to upload a file's content

# File content uploading

Upload file content. This can be called several times for chunked uploading. The content of the file or file chunk should be passed in the request body.

## POST METHOD

`http://localhost/RMSClient/api/v1/upload/file/{FileId}`

### Parameter:

- ❑ FileId (string) – File ID

### Response:

- ❑ ChunkSize (int) – Size of received file content



# End of file upload session

End file upload session and return the URL to the RMS interface with the uploaded files.

## POST METHOD

`http://localhost/RMSClient/api/v1/upload/endsession`

### Parameters:

- ❑ TicketId (string) – Ticket ID used to add files
- ❑ Host (string) – RMS host
- ❑ ReportPaths (string) – A complete resolvable path to the source report(s) or a folder which contains reports
- ❑ ModelPaths (string) – A complete resolvable path to the source models (non-template-bound), a folder with templates, or a model Definition ID
- ❑ TemplatePaths (string) – Complete resolvable path to the source template(s) or a template Definition ID
- ❑ TemplatesToModelsMap (string) – Association between the model and template. Model and Template Definition IDs can be used as input here instead of paths.
- ❑ DynamicFilter (string) – The initial dynamic filter for Data, Summary, and ES Style Views.
- ❑ Username (string) – User identifier
- ❑ Password (string) – User password
- ❑ ModelsFolder (string) – Refers to the Server Library password
- ❑ AllowedViews (string) – Data views that will be available for the user
- ❑ DefaultView (string) – Specifies the name of the view to be shown initially
- ❑ Encoding (string) – Encoding type of incoming reports
- ❑ Locale (string) – The locale to be used in the current session
- ❑ DeleteReports (bool) – Removes source report after user session ends
- ❑ DeleteModels (bool) – Removes source models after user session ends
- ❑ DeleteTemplates (bool) – Removes source templates after user session ends
- ❑ AdminMode (bool) – Allows uploading of shared models and deleting of models

### Response:

- ❑ URI – RMS URL to RMS interface with uploaded files