Report Mining Edition – Initiation Request

Version 15.3

MONARCH SERVER
Datawatch Corporation makes no representation or warranties with respect to the contents of this manual or the associated software and especially disclaims any implied warranties of merchantability or fitness for any particular purpose. Further, Datawatch Corporation reserves the right to revise this publication and make changes from time to time to its contents without obligation to notify anyone of such revisions or changes.

Datawatch Monarch Server software is offered and is to be used in accordance with a SOFTWARE LICENSE AND MAINTENANCE AGREEMENT. This agreement stipulates that this software be used only in the computer system designated in that agreement. The agreement further stipulates that the customer shall not copy or alter, or permit others to copy or alter, the software or related materials in whole or in part, in any media for any purpose, except to make an archive (back-up) copy or to make a copy as an essential step in the use of the software with the customer's computer.

Datawatch Corporation hereby grants the buyer the right to reprint this documentation for internal uses only. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, for any other purposes, without the prior written permission of Datawatch Corporation.

Monarch Server Report Mining Edition 15.3 Initiation Request
Copyright © 2018 by Datawatch Corporation
All rights reserved. Printed in the U.S.A.
Unpublished - Rights reserved under the copyright law of the United States.

Monarch Server is a trademark of Datawatch Corporation. Other products mentioned herein may be trademarks or registered trademarks of their respective owners in the United States or other countries.

For U.S. Government End Users, the software is a "Commercial Item(s),” as that term is defined at 48 C.F.R. Section 2.101, consisting of "Commercial Computer Software" and "Commercial Computer Software Documentation," as such terms are used in 48 C.F.R. Section 12.212 or 48 C.F.R. Section 227.7202, as applicable. Consistent with 48 C.F.R. Section 12.212 or 48 C.F.R. Sections 227.7202-1 through 227.7202-4, as applicable, the Commercial Computer Software and Commercial Computer Software Documentation are being licensed to U.S. Government end users (a) only as Commercial Items and (b) with only those rights as are granted to all other end users pursuant to the Datawatch Software License and Maintenance Agreement.

DATAWATCH CORPORATION
CORPORATE HEADQUARTERS
4 Crosby Drive
Bedford, MA 01730, USA
Tel.: +1 800.445.3311
Fax: +1 978.441.1114

NEW YORK
415 Madison Avenue, Suite 1421
New York, NY 10017
Tel.: +1 800.445.3311

GREENSBORO, NC
101 S Elm #225
Greensboro, NC 27401
Tel: +1 800.445.3311

EUROPE, MIDDLE EAST, AND AFRICA
EUROPEAN HEADQUARTERS
Siena Court, Broadway
Maidenhead, Berkshire SL6 1NJ
Tel: +44 203.868.0230

DATAWATCH AB
Eriksbergsgatan 10
Stockholm, Sweden SE-114 30
Tel: +46 853.480.483

ASIA PACIFIC
MANILA
U2011 20th Flr Jollibee Plaza Condominium F. Ortigas Jr. Rd., Ortigas Center Pasig City 1605 PH
Tel: +63 2.633.5583
Table of Contents

Introduction .......................................................................................................................... 1

Entry Point for Initiation Request .................................................................................. 1

Selecting the Presentation Type ...................................................................................... 2

Monarch Server Report Mining Edition Interactive View Request ............................... 3

Monarch Server Report Mining Edition Export View Request ...................................... 10
Introduction

Monarch Server Report Mining Server (RMS) Edition can be used through an initiation request. The request is sent using the HTTP POST method. It can be generated in a client browser by sending an HTML form with the fields named according to the corresponding parameters of the initiation request.

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/ChoiceRequestType

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 under which the application has been installed. By default, it is RMSClient.

The request is sent using the HTTP POST method. All parameters are passed as fields of the POST request.

The URL for an interactive view request is

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

The URL for an export view request is

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

For information about the URL for an external view request, see the Monarch Server Report Mining Edition 15.3 MECM Test Framework document.
Selecting the Presentation Type

The initiation request contains instructions to determine the type of presentation provided. You can select interactive, export, or external type of presentation in Monarch Server RMS Edition.

- To open a fully interactive mining application, click the **Interactive or Default** button. This type of presentation is used for the user to select views.
- To open an export (session-less) presentation, click the **Export** button. This type of presentation is used to publish a single export of data on the basis of a predefined set of mining rules to a particular data format. The request’s response will be HTML, PDF, CSV, XLS(X), PRF content, or an HTTP error.
- To open an external MECM test framework presentation, click the **External** button. This type of presentation is used for imitating a request from the McKesson portal. For more information about the external view request, see the *Monarch Server v15.3 RMS MECM Interfaces Reference* document.
RMS recognizes the request and then queries the report, model, and template data to determine the user’s available views. As a result, the page with the appropriate request parameters will be displayed.

The page contains the following items:

- **Host** field: Enter the name of the host where the report is located. The default value is the data retrieved by the initiation request to the server. This field is mandatory.

- **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 by any exporter.

- **Reports** field: Enter a complete resolvable path to the source report(s) or a folder that contains reports. This field is mandatory.
The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located in 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 under which the application is installed (RMSClient 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 comma (,):
  <report_1_path>;<report_2_path>;... <report_n_path>
- Path to the folder which contains reports (only .prn, .pdf, and .xps files will be retrieved)

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

---

Models field: Enter a complete resolvable path to the source models (non-template-bound), a folder with templates, or a model definition ID. This field is mandatory.

The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at 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 under which the application is installed (RMSClient 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 comma (,):
  <model_1_path>;<model_2_path>;... <model_n_path>
- Path to the folder which contains models
- Model Definition ID. The model object will be available to the user (if the user has the necessary access permissions).
- **Templates** field: Complete resolvable path to the source template(s) or a template definition ID. This field is mandatory.

The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at `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 under which the application is 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 comma (,): `<template_1_path>;<template_2_path>;... <template_n_path>`
- Path to the folder which content templates (only .xls and .xlsx files will be retrieved)
- Template Definition ID. The template object will be available to the user (if the user has the necessary access permissions).

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

- **Models to Templates** field: Enter the model-to-template association. Model and template definition IDs can be used as the input here instead of paths.

The default value are the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at `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 under which the application is installed (RMSClient by default)
NOTES

The list items should be separated with a comma (,):
<template_1_path>;<model_1_path>;<template_2_path>;<model_2_path>...
<template_n_path>;<model_n_path>

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

- **Dynamic Filter**: Enter 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.

- **Join Password** field: Enter join password for logging on to an external data source.
- **User ID** field: Enter user identifier.

NOTES

This identifier is used for getting user preferences and for authentication.

- **User Password** field: Enter 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 the user with the USER_ID and PASSWORD should already exist and be assigned with the RMS user privilege to login to RMS Client.

- **Server Library Folder** field: Enter a Server Library Folder identifier to make all the models and templates contained in the group available to the user, provided the user has the necessary access permissions.
NOTES

This identifier is also used when the user saves a model to the server. If DOCTYPE_ID is not provided, the model cannot be saved to the server. If DOCTYPE_ID is provided, then the model can be stored on the RMS and can be re-used in the following user sessions.

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

  **NOTES**
  
  The list items should be separated with a comma (,): 
  
  `<data_view_1> ; <data_view_2> ; ... <data_view_n>`.
  
  `<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: Specify the name of the view to show 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.
- **Reports Encoding** field: Select the 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 admin will be used.

- **Locale** field: Select 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: Select this check box to remove the source report after user session ends.

- **Delete Models** check box: Select this check box to remove the source models after user session ends.

- **Delete Templates** check box: Select this check box to remove the source templates after user session ends.

- **Admin Mode** check box: Select this check box to allow uploading of shared models and deleting of models.

- **Checksum** field: Contains the digital signature for the initiation request's parameters. The field is non-editable.
  - **Checksum button**: Click the button to generate a symmetric checksum.
  - **Checksum Asymmetric button**: Click the button to generate an asymmetric checksum.
NOTES
Checksum type is defined by the administrator.

- **Timestamp field**: Contains the timestamp of the request. The field is non-editable.

NOTES
Timestamp is represented as a number of milliseconds elapsed since Jan 01, 1970 (Java-style date/time representation).

- **Connect button**: Click the button to proceed to the application.
- **Connect in a New Window/Tab** button: Click the button to open the application in a new window/tab.
- **Reset** button: Click the button to clear insertions.
RMS recognizes the request and then queries the report, model, and template data. As a result, the page with the appropriate request parameters will be displayed.

The page contains the following items:

- **Host** field: Enter the name of the host where the report is located. The default value is the data retrieved by the initiation request to the server. This field is mandatory.

- **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 by any exporter.

- **Reports** field: Enter a complete resolvable path to the source report. This field is mandatory. The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at 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 under which the application is installed (RMSClient by default)
**NOTES**

Only one report can be published at a time.

- **Models** field: Enter a complete resolvable path to the source model (non-template-bound) or a model definition ID. This field is mandatory.

  The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at 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 under which the application is installed (RMSClient by default)

**NOTES**

Only one model can be used at a time.

**Important**: This parameter should only list table/summary models; template-bound models will not be resolved.

- **Templates** field: Complete resolvable path to the source template or a template definition ID. This field is mandatory.

  The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at 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 under which the application is installed (RMSClient by default)

**NOTES**

Only one template can be used at a time.
- **Models to Templates** field: Enter the model-to-template association. Object definition IDs can be used alongside object paths.

  The default value is the data retrieved by the initiation request to the server. The data are added automatically to the web server during installation and are located at `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 under which the application is installed (RMSClient by default)

- **NOTES**

  Only one template-to-model can be used at a time. The items of this parameter should be separated with a comma (,) and have the following format:

  `<template_1_path>;<model_1_path>`

- **Dynamic Filter** field: Enter 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`.

- **Join Password** field: Enter join password for logging on to an external data source.

- **User ID** field: Enter user identifier.

- **NOTES**

  This identifier is used for getting user preferences and for authentication.
- **User Password** field: Enter 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 the user with the USER_ID and PASSWORD should already exist and be assigned with the RMS user privilege to login to RMS Client.

- **Default View** field: Specify the name of the view for report display from the following:
  - HTML_REPORT
  - TABLE
  - SUMMARY
  - XLS_TABLE
  - XLS_SUMMARY
  - PRF
  - XFORM

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

- **Reports Encoding** field: Select the 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**: Select 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: Select this check box to remove the source report after user session ends.
- **Delete Models** check box: Select this check box to remove the source models after user session ends.
- **Delete Templates** check box: Select this check box to remove the source templates after user session ends.
- **Export to** field: Select export format from the following:
  - HTML
  - PDF
  - CSV
  - XLS
  - PRF

  **NOTES**
  Different export formats are available depending on the selected Default View for report display.

- **Checksum** field: Contains the digital signature for the initiation request’s parameters. The field is non-editable.
  - **Checksum button**: Click the button to generate a symmetric checksum.
  - **Checksum Asymmetric button**: Click the button to generate an asymmetric checksum.

  **NOTES**
  The checksum type (symmetric/asymmetric) is defined by the administrator.
- **Timestamp field**: Contains the timestamp of the request. The field is non-editable.

  **NOTES**

  Timestamp is represented as the number of milliseconds that has elapsed since Jan 01, 1970 (Java-style date/time representation).

- **Connect button**: Click the button to open a report.
- **Connect in a New Window/Tab button**: Click the button to open a report in a new tab.
- **Reset button**: Click the button to clear insertions.