

Oracle Report Parser System Administration Guide  
10g Release 3 (10.1.3.3.0)

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Oracle Report Parser System Administration Guide, 10g Release 3 (10.1.3.3.0)  
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# INTRODUCTION

## OVERVIEW

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This section covers the following Topics:

- ❖ [About this Guide](#) (page -1)
- ❖ [About Report Parser](#) (page -2)

## ABOUT THIS GUIDE

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This guide is structured using separate chapters to individually address the three primary processes involved in creating report blueprints.

- ❖ [Chapter 2 \(\*Using Blueprints\*\)](#)

This chapter describes the necessary processes that you use to specify the overall print structure for the report. It includes information about creating new blueprints, editing existing blueprints, organizing the page layout, determining pagination, choosing report lengths, and establishing content item breaks.

- ❖ [Chapter 3 \(\*Communicating with Oracle Report Parser\*\)](#)

This chapter describes the necessary processes that you use to specify the formatting characteristics for the report. It includes information about selecting metadata associated with the report, selecting the file type for check in, and how to validate your report before the final processing.

❖ [Chapter 4 \(Processing Reports\)](#)

This chapter describes the necessary processes that you use to configure the final processing options of the report. It includes information about running reports manually, scheduling them for automatic processing, and configuring the options for automatic report processing.

## ABOUT REPORT PARSER

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This section covers the following topics:

- ❖ [Report Parser Background](#) (page -2)
- ❖ [Terminology](#) (page -3)
- ❖ [Report Parser Data Directory](#) (page -4)
- ❖ [Preliminary Tasks](#) (page -6)
- ❖ [Using Report Parser in a Proxy Instance](#) (page -7)

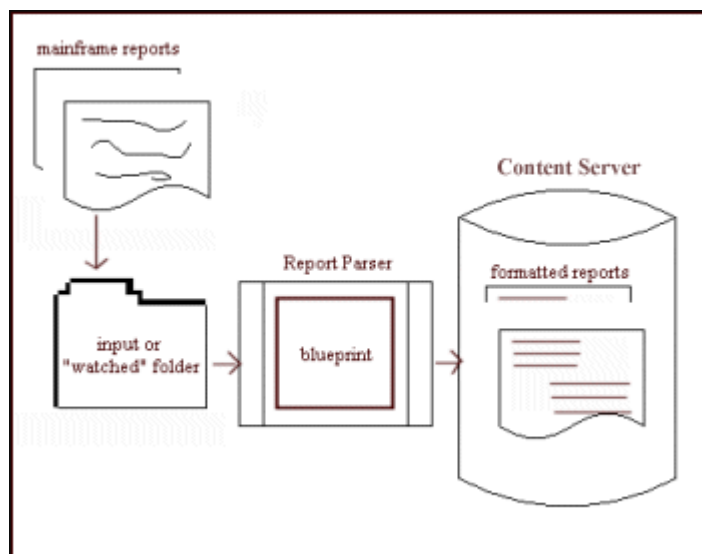
### Report Parser Background

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Report Parser is an optional add-on module for Oracle Content Server, and it enables you to convert your text reports into web-viewable files that are easy to find and review. Report Parser processes your reports, such as those from a mainframe or report generator, into customized formatted files according to your design specifications. The output files (which can be produced in text, HTML, XML, or PDF format, or passed through in native format) are then automatically checked into the content server for immediate access and management.

For example, if your mainframe system generates 1,000 pages of financial data every Monday, you can configure Report Parser to automatically produce a report each Monday containing the data output from the mainframe system. Based on a predefined template, or “blueprint”, which you design, the financial data is parsed into a formatted, easy to read, web-viewable file or set of files. The output files are then automatically checked into your content server, so anyone with the appropriate access permissions can immediately retrieve them.

First, configure your mainframe reports to be placed into a Report Parser input folder, also known as a “Watch Directory.” Then, create and point a blueprint to that input folder. The parsed report will be checked into Oracle Content Server based on the metadata or Field Info that the blueprint specifies.



## ***Parsing Reports***

To parse reports and check them into Oracle Content Server, perform the following tasks:

- ❖ Create blueprints
- ❖ Define report structure for the web-viewable report
- ❖ Set page breaks
- ❖ Set content item breaks
- ❖ Work with field information for the web-viewable report
- ❖ Set primary and alternate file format information
- ❖ Validate blueprints
- ❖ Process reports manually or automatically

## **Terminology**

---

The following terms are used throughout this guide, and their corresponding definitions:

- ❖ **Blueprint:** A report “template” that is used to define the structure, formatting, scheduling, and indexing criteria for each report type that Report Parser processes.
- ❖ **Content item sequence:** A number that enumerates items of content that are generated and checked into the content server by Report Parser. For example, a report can be parsed into several separate content items prior to being checked into the

content server. The numeric order in which the items are created by Report Parser equates to the content item sequence.

- ❖ **Content management system:** Oracle Content Server works in conjunction with Report Parser. When a report is processed, Report Parser checks in the generated Content Item(s) to Oracle Content Server for immediate electronic access.
- ❖ **Exemplar text:** Text that is extracted from an actual report. Exemplar Text is used when setting up a blueprint on the Edit Blueprint screen to enable you to validate the appropriate formatting of the output file prior to parsing the report.
- ❖ **Field info:** The descriptive information, sometimes referred to as metadata, that is associated with each document when checked into the content server. Generally, Field Info is the important information about a file that you and others use to find it, such as: the Author, Title, Revision, Content Type, etc. Report Parser Field Info corresponds to Field Info within your content management system.
- ❖ **Header constant:** A string that is extracted (while parsing a report) from a specified location in each page header.
- ❖ **Primary file format:** The file format of the published report that will be stored in the content server.
- ❖ **Alternate file format:** (Optional) A secondary file format for the published report. The Alternate File is specified only if you want to check in another file format in addition to the Primary File Format specified.



**Note:** If an alternate file is specified, the web-viewable version of the output content item is generated from the alternate file, rather than the primary file.

- ❖ **Watch directory:** The watch directory refers to the location a generated report is placed when ready to be processed through Report Parser. This watched location is set for each blueprint with the Scheduling/Indexing tab “Find Reports In:” option, accessible from Report Parser Blueprint Editor screen. To be valid, a watch directory must have these qualities:
  - Exists in the server's file system
  - Is a descendent of one of the RpWatchDirectoryRoots specified in `<install_dir>/<instance_name>/custom/reportparser/resources/rp.cfg`.

## Report Parser Data Directory

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When you install Report Parser on your system, samples are available by default at the following location:

`<install_dir>/<instance_name>/custom/reportparser/data/`

where `<install_dir>/<instance_name>/custom/reportparser` is the installation directory specified during Report Parser product installation. For example, on a Content Server, you might find this directory at this location:

`C:/<install_dir>/idcm1/custom/reportparser/data/`

The data directory contains several files. There are sample reports and blueprints that can be used as examples while you are becoming familiar with using Report Parser.

The following table provides a description of the files provided in the data directory.

| <b>Subdirectory</b> | <b>Description</b>   |
|---------------------|--|
| Blueprints          | Contains sample blueprint files that you can use to become familiar with Report Parser functionality. Blueprint files have the file extension “.hda”.  |
| Input               | Input directory for reports. This directory is the default watched directory location as specified by “Find Reports In:” option on the Scheduling/Indexing tab in the Blueprint Editor.        |
| Log                 | Directory where log files are generated that report detailed processing information after a run. (Used in debugging.)  |
| SaveInput           | After a report has been processed, it is moved from the watched directory (for example, Input) to the SaveInput directory.   |
| SaveTemp            | Contains the constructed PDF file, or other output file, that was saved upon failure of Report Parser processing. (Used in debugging.)   |
| temp                | Location of all interim files generated by the Report Parser during processing.  |
| TestReports         | Sample reports that you can use in conjunction with the sample blueprints to become familiar with Report Parser functionality. The sample reports are text files with a “.txt” file extension. |



**Note:** Each report contained in the TestReports directory has a corresponding blueprint file that resides in the Blueprints directory. For example, the blueprint file metadataTest.hda has a corresponding sample report file named metadataTest.txt. This one-to-one correspondence between blueprints and reports is just for simplicity of the examples. In practice, a single blueprint will be applied to more than one report.

## Preliminary Tasks

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Before you begin to use Report Parser, it is important that you perform these preliminary tasks:

- ❖ Ensure that your mainframe reports are ported to the  
`//<install_dir>/<instance_name>/custom/reportparser/Input` directory.



**Note:** Reports can be placed in any valid watch directory. To be valid, a watch directory must exist on the server's file system, and must be a descendent of one of the RpWatchDirectoryRoots specified in `<install_dir>/<instance_name>/custom/reportparser/resources/rp.cfg`. In practice, you need to keep track of the set of watch directories you are using, and use the Blueprint Manager to review which watch directories are pointed to by particular blueprints.

- ❖ Update your blueprints from a previous version by validating and resaving them. It is likely that you will need to perform these tasks:
  - Identify Field Info for your parsed reports to use in Oracle Content Server. It is important that users be able to find the parsed reports that they need. You will probably need to add a Content ID Field unless you have configured Content Server to automatically assign Content IDs on checkin. This configuration is done using Content Server's System Properties utility.
  - Adjust your input directory in the **Find Reports in** field on the Scheduling/Indexing tab.
- ❖ Become familiar with your configuration settings. Select **OptionsConfiguration** from the Blueprint Manager to view these settings.

## Using Report Parser in a Proxy Instance

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To use Report Parser in a Content Server proxy instance, you must either install Report Parser in the master instance as well as the proxy instance, or copy the following files from the proxy's weblayout directory to the master's weblayout directory:

- ❖ common/rpclient.cab
- ❖ common/rpclient.zip
- ❖ images/reportparser.gif
- ❖ help/reportparser [entire directory]

For more information about Content Server proxy installations, refer to the *Oracle Content Server Installation Guide for Windows* or *Oracle Content Server Installation Guide for UNIX*.



# USING BLUEPRINTS

## OVERVIEW

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This section covers the following topics:

- ❖ [Working With Blueprints](#) (page -1)
- ❖ [Defining the Report Structure](#) (page -5)
- ❖ [Setting Page Breaks](#) (page -9)
- ❖ [Setting Content Item Breaks](#) (page -12)

## WORKING WITH BLUEPRINTS

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This section covers the following topics:

- ❖ [About Blueprints](#) (page -1)
- ❖ [Blueprint Manager Screen](#) (page -2)
- ❖ [Edit New Blueprint Screen](#) (page -2)
- ❖ [Edit Blueprint Properties Screen](#) (page -3)
- ❖ [Exemplar Text ID Screen](#) (page -4)
- ❖ [Creating Blueprints](#) (page -4)

## About Blueprints

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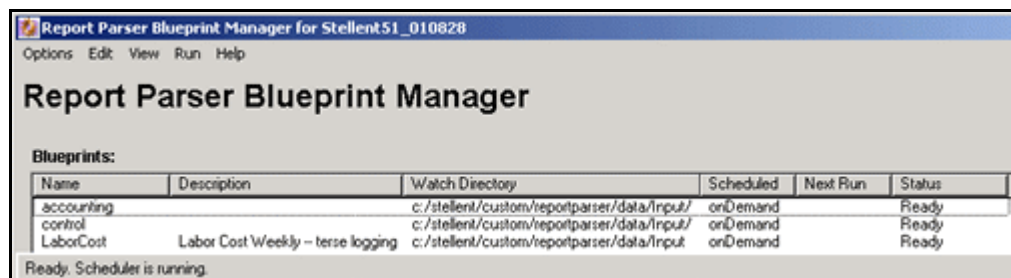
A blueprint is a report “template” that is used to define the structure, formatting, scheduling, and indexing criteria for each report type that Report Parser processes. You create one blueprint for each type of report that you process, and you configure that blueprint to point to the input directory in which this report type resides. This means that one blueprint points to one input directory, and is applied to one type of report.

For example, suppose that your organization produces an Accounts Receivable report every Friday. This report always contains the same type of information formatted in precisely the same way. Although the format of the report is consistent, it is clumsy and cumbersome for a person to read. The Report Parser enables you to restructure your report, based on criteria that you specify, into one or more paginated, formatted, legible, electronic files. Therefore, you would likely want to configure a blueprint for the weekly Accounts Receivable reports, and schedule it for processing each Friday. The result will be a viewable report, in the output format that you specify, which is now managed by your content management system. You can then access this report from your content management system by performing a full-text or metadata search.

All blueprints are created, configured, and managed through the Report Parser Blueprint Manager screen.

## Blueprint Manager Screen

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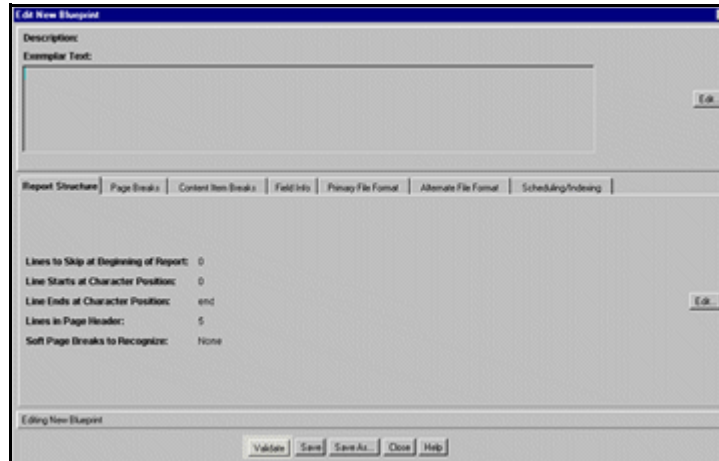


| Name       | Description                       | Watch Directory                             | Scheduled | Next Run | Status |
|------------|-----------------------------------|---|-----------|----------|--------|
| accounting |                                   | c:/stellent/custom/reportparser/data/input/ | onDemand  |          | Ready  |
| control    |                                   | c:/stellent/custom/reportparser/data/input/ | onDemand  |          | Ready  |
| LaborCost  | Labor Cost Weekly – terse logging | c:/stellent/custom/reportparser/data/input/ | onDemand  |          | Ready  |

Ready. Scheduler is running.

Access this screen by selecting **Start—Programs—Oracle Content Server—<Instance\_Name>—Report Parser** on the server. You can also access it through the Content Server Admin page from a client system browser. Use the Blueprint Manager screen to add and edit your blueprints.

## Edit New Blueprint Screen



Access this screen by selecting **Edit—Add Blueprint** on the Blueprint Manager screen. Use it to add a new blueprint definition. The Edit Blueprint screen is divided into two regions as shown in the following figure.

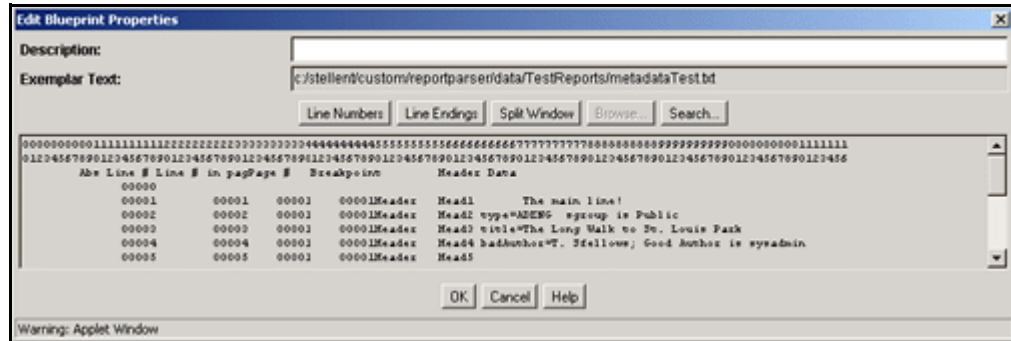
The top area of the screen displays the Exemplar Text for the type of report that you will process using the new blueprint. (This area will be blank when you are adding a new blueprint.) The text displayed here is typically extracted from a sample report that is representative of the type of report that will be parsed.

The bottom area of the screen displays several report processing tabs used for defining the criteria for formatting and processing reports with the current blueprint. These tabs are further defined in the following sections.



**Note:** The Validate button is used after the printing and formatting requirements have been set and prior to actually parsing your report. Refer to [Validating Blueprints](#) (page -18) for detailed instructions.

## Edit Blueprint Properties Screen



Access this screen by clicking **Edit** on the top panel of the Edit New Blueprint screen. Use it to specify a sample report from which to extract the exemplar text for this blueprint.

| Field        | Description   |
|--------------|---|
| Line Numbers | Displays a number to each line of the exemplary text. This may help you to specify regions within the exemplar text, and compare the exemplar text with the headers in similar reports. |
| Line Endings | Displays a marker that shows the end of each line. This is useful if your lines end in spaces.  |
| Split Window | Adds a second window, so you can work with both the header information and the report body in the same screen.  |
| Browse       | Enables you to search for a report in the local file system from which to extract exemplar text.  |
| Search       | Enables you to search for a Content Item in Oracle Content Server from which to extract exemplar text.  |



**Note:** The Browse button is active only when you run Report Parser as an application on the server, not when you run it as an applet. The Search button is active when you run it as an application or an applet.

## Exemplar Text ID Screen

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Access this screen by clicking **Search** on the Edit Blueprint Properties screen. Use it to search for exemplar text in Oracle Content Server. You can search by Content ID or Title.

## Creating Blueprints

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To set up a new blueprint, perform the following tasks:

1. Launch Report Parser by choosing **Start—Programs—Oracle Content Server—*instancename*—Report Parser**.  
The Report Parser Blueprint Manager screen is displayed.
2. Click **Edit—Add Blueprint**.  
The Edit New Blueprint screen is displayed.
3. Click **Save As** to display the Save As screen.
4. Enter a blueprint name, and click **OK**.
5. Click **Edit** to the right of the Exemplar Text area of the screen.  
The Edit Blueprint Properties screen is displayed. Use this screen to specify a sample report from which to extract exemplar text to use in the current blueprint.
6. Click **Browse** to look for exemplar text in the file system, or click **Search** to look for exemplar text in Oracle Content Server.



**Note:** The Browse button is active only when you run Report Parser as an application on the server, not when you run it as an applet. The Search button is active when you run it as an application or an applet.

The Pick Sample Report screen or the Exemplar Text ID screen is displayed.

7. Specify a sample report file in the File name field, or search for a sample report.  
Lines of text copied from the selected file appear within the Exemplar Text window on the Edit Blueprint Properties screen.
8. Click **OK**.
9. Specify the options for report structure, page breaks, content item breaks, field info, primary file format, alternate file format, and scheduling/indexing as described in the tasks illustrated throughout this guide.
10. Click **Save** to save your changes to the blueprint.



**Note:** When creating a blueprint to function in passthru mode, if exemplar text is accidentally selected, the exemplar text cannot be deselected. To correct this, the user must delete the passthru blueprint and recreate it without exemplar text.

## DEFINING THE REPORT STRUCTURE

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This section covers the following topics:


- ❖ [Report Structure Tab](#) (page -6)
- ❖ [Edit Report Structure Screen](#) (page -6)
- ❖ [Adding or Editing Report Structure Parameters](#) (page -9)

Report Structure defines the basic structure of the report, including header information, line start and end positions, and soft page breaks. It is important to understand how your sample input reports are structured, so you can tell Report Parser how to produce useful output (parsed) reports.

**Figure 2-1** Sample Input Report

| 1 REPORT PARSER TUTORIAL |               | VOGON PROPULSION  |                           |
|--------------------------|---------------|-------------------|---------------------------|
| BOR COST TABULATION      |               |                   |                           |
| 0 SUPERVISOR             | CLOCK #       | GROUP REPORTABLE  | BILLINGS                  |
| WARREN                   | 103215        | ORDER A3644L10    | NARMLY/4600-A2348 REV. 3A |
| REPORT DATE              | 08/19/00-1052 | AUG 18 2000       | 66                        |
| OGROUP                   | JOB TICKET    | ----- HOURS ----- | -----B I L                |
| N G U N I T S-----       |               | TOTAL             |                           |
| NUMBER                   | EXEMPT        | HOURLY            | HRLY OT                   |
| MATL/ODC                 | OUT PROD      | OVHD              | EXPS                      |
| HOURLY                   | DIRECT        | PREM              |                           |
| I30AA0001                | 64L1211300    | A                 |                           |
| 1301                     |               | 1301              |                           |
| I30AE0005                | 64L1211300    | A                 |                           |
| 4921                     |               | 4921              |                           |
| I30AE7521                | 64L1211300    | A                 |                           |
| 108                      |               |                   | 108                       |
| I30AE8300                | 64L1211300    | A                 |                           |
| 10                       |               |                   | 10                        |
| I30AE8330                | 64L1211300    | A                 |                           |
|                          |               | 25                |                           |
|                          |               |                   | 1705                      |



| Field                             | Description  |
|-----------------------------------|--|
| Line Starts at Character Position | The starting position of the first character for each line in the resulting parsed report.   |
| Line Ends at Character Position   | The last character position to be included for each line in the resulting parsed report.   |
| Lines in Page Header              | The number of lines in each page header in the report.   |
| Soft Page Breaks to Recognize     | <p>If applicable, any special page break indicators to be recognized. Usually defined as None. This field provides an alternate method for specifying page breaks. You can also use <a href="#">New Page Begins</a> (page -11).</p> <p> <b>Note:</b> If "1 in First Column" is selected, then whenever a "1" occurs in column one of the body of the *input report*, a new page is started in the current output document.</p> <p>Or, if "Every x Number of Lines" is selected, then the "Soft Page Break Line Count" field is enabled.</p> |
| Soft Page Break Line Count        | <p>A new page is started in the current output document after the number of lines in this field is reached or when the method specified in the <a href="#">New Page Begins</a> (page -11) field is achieved. The number entered in this field can be any integer that is greater than or equal to the number entered in the "Lines in Page Header" field.</p>  |

## Adding or Editing Report Structure Parameters

---

To add new or edit existing report structure parameters for parsing the input report, perform these tasks:

1. From the Blueprint Manager screen, select **Edit—Add Blueprint** or **Edit—Edit Blueprint**.

The Edit New Blueprint or Edit Blueprint screen is displayed.

2. Select **Edit** on the Report Structure tab to edit the options for the web-viewable report structure.

The Edit Report Structure screen is displayed.

3. Set the values as desired.

## SETTING PAGE BREAKS

---

This section covers the following topics:

- ❖ [Reasons to Set Page Breaks](#) (page -9)
- ❖ [Page Breaks Tab](#) (page -10)
- ❖ [Edit Page Breaks Screen](#) (page -10)
- ❖ [Adding or Editing Page Breaks](#) (page -12)

### Reasons to Set Page Breaks

---

Set page breaks for these reasons:

- ❖ To define where a new page begins.
- ❖ To set the location of any header constants.
- ❖ To specify the maximum number of pages for each content item to be checked into your content management system.

## Page Breaks Tab

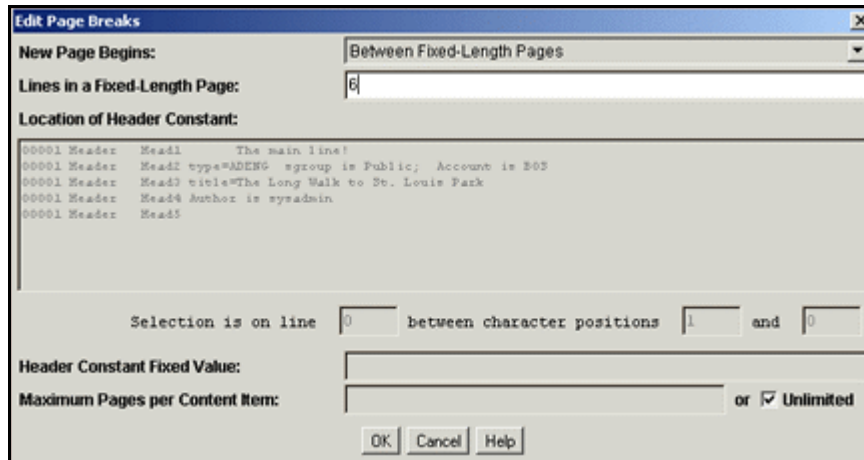
---



Access this tab by selecting **Edit—Add (or Edit) Blueprint** from the Blueprint Manager screen, then select the Page Breaks tab. Use the Page Breaks tab to define where a new page begins, the location of any header constants, and the maximum number of pages for each content item to be checked into your content management system.

## Edit Page Breaks Screen

---



Use the Edit Page Breaks screen to specify where new pages should begin, header constant, and maximum pages per content item.

Access this screen by selecting **Edit** on the Page Breaks tab.

| Field                          | Description  |
|--------------------------------|--|
| New Page Begins                | <p>Specifies the rules that determine when to start a new page in the current output file (content item), based on data seen while parsing the input report. This field provides an alternate method for specifying page breaks. You can also use <a href="#">Soft Page Breaks to Recognize</a> (page -7).</p> <p>Valid options are:</p> <p>Never: Keeps report on one page. All other screen options become unavailable.</p> <p>Between Fixed-Length Pages: Enables you to specify the number of lines in a fixed-length page and the maximum pages per content item.</p> <p>When Header Constant Matches First Page. Starts a new page in the current output file (content item) when the contents of the header constant in the current page of the input report match the contents of the first header constant in the report.</p> <p>When Header Constant Matches Fixed Value. Starts a new page in the current output file (content item) when the contents of the header constant in the current page of the input report matches the value specified in the “Header Constant Fixed Value” field.</p> |
| Location of Header Constant    | <p>A line number, a character start position, and a character end position together define a location, within one of the header regions of the input report. The “Location of Header Constant” specifies a region that has contents compared either to a specified fixed value, or to the corresponding location on the first page of the input report.</p>  |
| Maximum Pages per Content Item | <p>The maximum number of pages allowed for each content item to be checked into the content management system. For example, you might want to limit the number of pages per content item to minimize download time for users who will access the report remotely. Select “Unlimited” to impose no limit.</p>   |

## Adding or Editing Page Breaks

---

To add or edit page breaks for web-viewable reports, perform these tasks:

1. From the Blueprint Manager screen, select **Edit—Add Blueprint** or **Edit—Edit Blueprint**.

The Edit New Blueprint or Edit Blueprint screen is displayed.

2. Select **Edit** on the Page Breaks tab to modify the page break settings.

The Edit Page Breaks screen is displayed.

3. Specify criteria for page breaks and the header constant.



**Note:** The header constant is highlighted in red within the text window. This window displays changes to the header constant location to help you validate the criteria you specify. The header constant is not used when the value of New Page Begins is either *Never* or *Between Fixed-Length Pages*.

4. Click **OK** when changes are complete.

## SETTING CONTENT ITEM BREAKS

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Set content item breaks to define the breakpoints between content items and the maximum number of content items allowed for the resulting parsed report.

This section covers the following topics:

- ❖ [Content Item Breaks Tab](#) (page -13)
- ❖ [Edit Content Item Breaks Screen](#) (page -13)
- ❖ [Adding or Editing Content Item Breaks](#) (page -15)

## Content Item Breaks Tab

|   |             |   |            |                     |                |
|---|-------------|---|------------|---------------------|----------------|
| Report Structure                        | Page Breaks | <b>Content Item Breaks</b>  | Field Info | Primary File Format | Alternate File |
| <b>New Content Item Begins:</b>         |             | When Breakpoint Differs from Previous Page  |            |                     |                |
| <b>Location of Breakpoint:</b>          |             | Selection is on line 1 between character positions 1 and 5                        |            |                     |                |
| <b>Selection Color:</b>                 |             |  |            |                     |                |
| <b>Maximum Number of Content Items:</b> |             | Unlimited   |            |                     |                |

Access this tab by selecting **Edit—Add (or Edit) Blueprint** from the Blueprint Manager screen, then select the Content Item Breaks tab. Use it to view the rules and parameters for determining the breakpoints between content items and the maximum number of content items allowed for the resulting parsed report

## Edit Content Item Breaks Screen

**Edit Content Item Breaks** [X]

**New Content Item Begins:** When Breakpoint Differs from Previous Page

**Location of Breakpoint:**

```

00001 Header  Head1      The main line!
00001 Header  Head2 type=ADMIN  sgroup is Public; Account is B03
00001 Header  Head3 title=The Long Walk to St. Louis Park
00001 Header  Head4 Author is sysadmin.
00001 Header  Head5

```

Caret is on line  between character positions  and

**Breakpoint Fixed Value:**

**Maximum Number of Content Items:**  or  Unlimited

OK Cancel Help

Use the Edit Content Item Breaks screen to specify rules and parameters associated with breakpoints between content items.

| Field                           | Description   |
|---------------------------------|---|
| New Content Item Begins         | <p>Specifies the rules that determine when to close the current output file and start a new one, based on the input report. The breakpoint is a specified location (line number, start position, end position) within each page-header in the input report. The actual characters that appear in this location, that is, the contents of the breakpoint, may change between pages of the input report. Options for specifying are:</p> <p><b>Never:</b> results in a single content item for the published report (that is, no breakpoints)</p> <p><b>When Breakpoint Matches First Content Item:</b> starts a new output file, that is, content item, when the contents of the breakpoint match the contents of the first breakpoint from the input report.</p> <p><b>When Breakpoint Matches Fixed Value:</b> starts a new output file when the contents of the breakpoint matches the value specified in the Breakpoint Fixed Value field on the Content Item Breaks screen.</p> <p><b>When Breakpoint Differs From Previous Page:</b> starts a new output file when the contents of the breakpoint are different from those of the breakpoint on the previous page of the input report.</p> |
| Location of Breakpoint          | The specific position of the breakpoint within the page-headers of the input report.  |
| Maximum Number of Content Items | The maximum number of content items that may be generated while parsing a single input report. Select “Unlimited” to impose no limit.   |

## Adding or Editing Content Item Breaks

---

To set content item breaks, perform these tasks:

1. From the Blueprint Manager screen, select **Edit—Add Blueprint** or **Edit—Edit Blueprint**.

The Edit New Blueprint or Edit Blueprint screen is displayed.

2. Select **Edit** on the Content Item Breaks tab.

The Edit Content Item Breaks screen is displayed.

3. Specify criteria for Content Item Breaks and breakpoints.



**Note:** The location of the Breakpoint is displayed in blue within the text window. This window displays changes to the breakpoint location to help you to validate the criteria you specify.

4. Click **OK**.



# COMMUNICATING WITH ORACLE REPORT PARSER

## OVERVIEW

---

This section covers the following topics:

- ❖ [Working with Field Information](#) (page -1)
- ❖ [Using Primary and Alternate File Formats](#) (page -10)
- ❖ [Validating Blueprints](#) (page -18)

## WORKING WITH FIELD INFORMATION

---

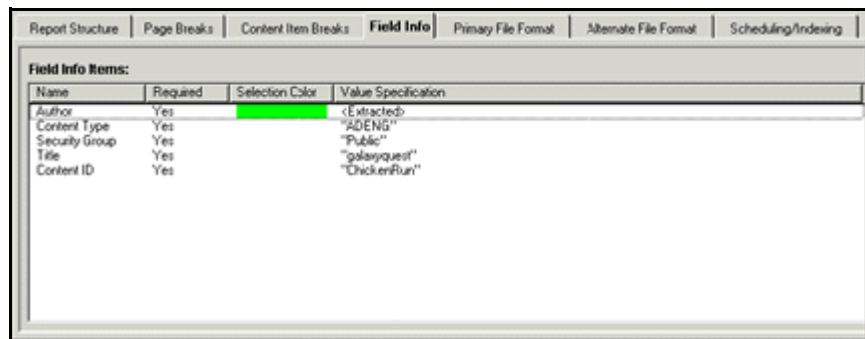
You can specify the field information or metadata to associate with the report. This field info identifies the report in Oracle Content Server with each of the content items that are generated from the input report.

This section covers the following topics:


- ❖ [Field Info Tab](#) (page -2)
- ❖ [Add Field Info Item Screen](#) (page -3)
- ❖ [Edit Field Info Item Screen](#) (page -4)
- ❖ [Add Chunk For Field Info Item Screen: Content Item Sequence](#) (page -5)
- ❖ [Add Chunk For Field Info Item Screen: Extracted](#) (page -6)

- ❖ [Add Chunk For Field Info Item Screen: String](#) (page -7)
- ❖ [Edit Chunk For Field Info Item Screen](#) (page -8)
- ❖ [Setting Field Information](#) (page -9)
- ❖ [Adding Field Info](#) (page -9)
- ❖ [Editing Field Info](#) (page -9)
- ❖ [Adding a Chunk](#) (page -10)
- ❖ [Editing a Chunk](#) (page -10)

## Field Info Tab



The Field Info tab describes the field information Report Parser assigns to a generated output file (content item) when it is checked in to Oracle Content Server. This corresponds to the Field Info, or metadata, used by your content management system. Access this tab by selecting **Edit—Add Blueprint** from the Blueprint Manager screen, then select the Field Info tab.

| Field         | Description  |
|---------------|--|
| Type of Chunk | <p>String: a specified text string</p> <p>Extracted: extracted from a specified location within the report content</p> <p>Content Item Sequence: a numeric value associated with the sequence of multiple content items for a single report</p> <p> <b>Note:</b> The following items are fields that you might populate with the types of chunks defined in this field.</p> |

| Field                                  | Description  |
|--|--|
| Author                                 | The author, or creator, of the report. Options for specifying Author values are: String, Extracted, or Content Item Sequence, as defined above.  |
| Title                                  | A descriptive name for the report. This field should provide a brief, but adequate, description of the report content. Options for specifying Title values are: String, Extracted, or Content Item Sequence, as defined above.   |
| Content Type                           | Correlates to the Content Type as specified within your content management system. For example, this might be relative to a department, such as “Engineering” or “Marketing.” Options for specifying Content Type values are: String, Extracted, or Content Item Sequence, as defined above. |
| Content ID                             | Equates to the Content ID in the content management system. Typically the convention used is similar to a file naming convention. Options for specifying Content ID values are: String, Extracted, or Content Item Sequence, as defined above.   |
| Security Group                         | The security group that the report content item(s) will belong to when checked into the content management system. For example, “Public”. Options for specifying Security Group values are: String, Extracted, or Content Item Sequence, as defined above.                                   |
| Revision, Checkin Date, Comments, etc. | Additional non-required field info. These fields will vary depending upon your content management system configuration. Options for specifying the values of the additional fields are: String, Extracted, or Content Item Sequence, as defined above.                                       |



**Note:** The first five fields listed on the Field Info tab reflect those fields required by the Oracle Content Server. Additional fields that have been configured on your content server will also be available to you if you choose to include them with the checked in file. To view the additional available fields, choose Add on the Field Info tab on the Edit Blueprint screen.

## Add Field Info Item Screen

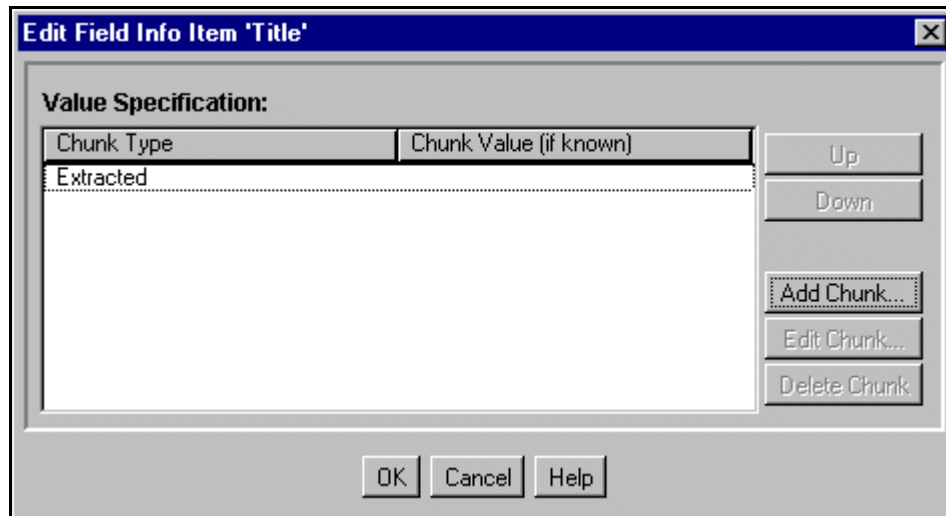
---



Access this screen by clicking **Add** on the Field Info tab. Use it to specify the name of a Field Info (metadata) Item to add to the blueprint. All of the specified Field Info Items will be used when the parsed report is checked into Oracle Content Server.

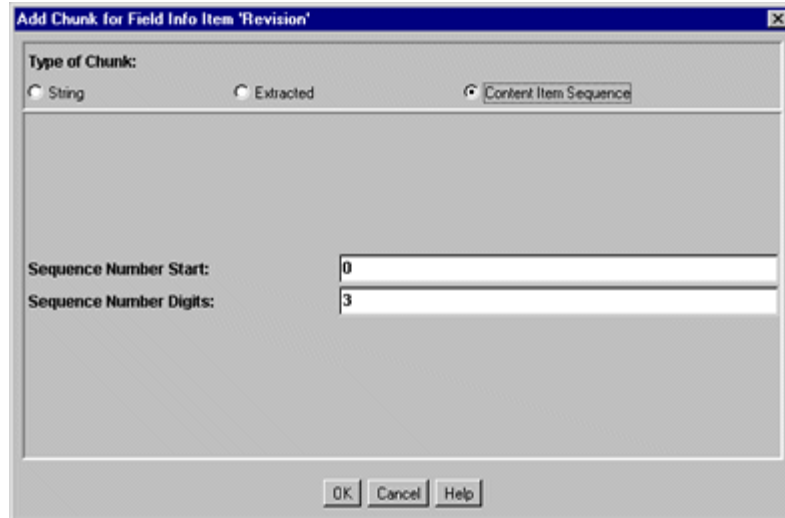
## Edit Field Info Item Screen

---



Access this screen by selecting a Field Info Item on the Field Info tab and clicking **Edit**. Use it to add, edit, or delete a “chunk” of information that will be used to construct the value of this Field Info (metadata) Item just before the current Content Item is checked in to Content Server.

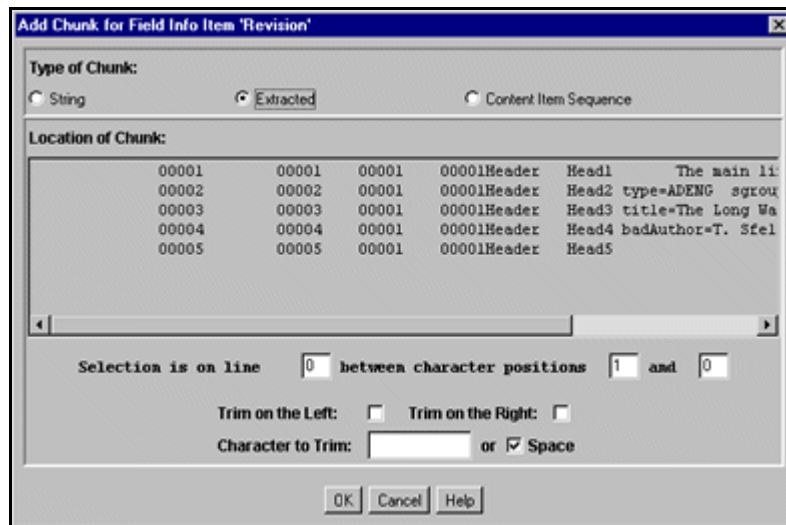
## Add Chunk For *Field Info Item* Screen: Content Item Sequence



| Field                 | Description  |
|-----------------------|--|
| String                | Enables you to enter a literal string for the chunk value. You can use IdocScript in a string chunk. If you use IdocScript, Report Parser will attempt to evaluate it when the report is parsed. This allows you to define a chunk that is dependant on the context of the report data or the Content Server environment. For example, you can use IdocScript to populate the Expiration Date field with a date in the future dependant on the date the report was parsed. |
| Extracted             | Enables you to extract data from the exemplar text for the chunk value.  |
| Content Item Sequence | Enables you to specify that the value for the chunk is to be a string, based on the number of the current output file, in order of creation by Report Parser.  |
| Sequence Number Start | The number with which to start numbering the output files. For example, if 3 output files are created, and Sequence Number Start is 99, the generated values will be 99, 100, and 101.   |

| Field                  | Description   |
|------------------------|---|
| Sequence Number Digits | The number of digits to use in the string representation of the sequence number, padding with zeros. For example, if the sequence number is 2, and Sequence Number Digits is set to 5, the value will be “00002”. |

## Add Chunk For *Field Info Item* Screen: Extracted



| Field  | Description  |
|--------|--|
| String | Enables you to enter a literal string for the chunk value. You can use IdocScript in a string chunk. If you use IdocScript, Report Parser will attempt to evaluate it when the report is parsed. This allows you to define a chunk that is dependant on the context of the report data or the Content Server environment. For example, you can use IdocScript to populate the Expiration Date field with a date in the future dependant on the date the report was parsed. |

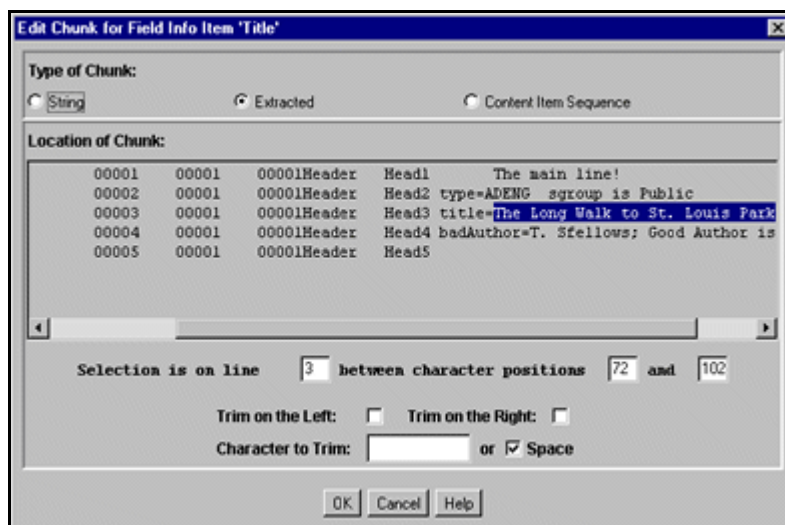
| Field  | Description  |
|--|--|
| Extracted  | Enables you to specify a location in the page-header of the current page of the input report. This is the location from which to extract the value of the chunk as the input report is being parsed.       |
| Selection is on line __ between character positions __ and __. | Enables you to specify the location (line number, start position, end position) in the page-header. This is the location from which to extract the value of the chunk as the input report is being parsed. |
| Trim on Left   | Enables you to trim characters or spaces from the left edge of the extracted value.  |
| Trim on Right  | Enables you to trim characters or spaces from the right edge of the extracted value.   |
| Character to Trim or Space                                     | Specify the character or space to trim from the right and/or left edge(s) of the extracted value.  |

## Add Chunk For *Field Info Item* Screen: String



| Field                 | Description  |
|-----------------------|--|
| String                | Enables you to enter a literal string for the chunk value. You can use IdocScript in a string chunk. If you use IdocScript, Report Parser will attempt to evaluate it when the report is parsed. This allows you to define a chunk that is dependant on the context of the report data or the Content Server environment. For example, you can use IdocScript to populate the Expiration Date field with a date in the future dependant on the date the report was parsed. |
| Extracted             | Enables you to extract data from the exemplar text for the chunk value.  |
| Content Item Sequence | Enables you to specify a Content Item Sequence number for the chunk value.   |
| Literal String        | Specify a string to use as the value for the chunk.  |

## Edit Chunk *For Field Info* Item Screen



Access this screen by selecting a chunk on the Edit Field Info screen and clicking **Edit Chunk**. Use it to edit an existing chunk. See one of the “Add Chunk” screens above for more information.

## Setting Field Information

---

You can specify the field information to associate with each of the content items that are generated from the input report. Each field info item's value is made from one or more chunks. Each chunk is one of these:

- ❖ Literal String
- ❖ Extracted from the input report
- ❖ Content item sequence: based on the number of the current output file, in order of creation by Report Parser.

To set field information, perform these tasks:

1. From the Blueprint Manager screen, select **Edit—Add Blueprint** or **Edit—Edit Blueprint**.

The Edit New Blueprint or Edit Blueprint screen is displayed.

2. Select the Field Info tab.
3. Add or edit field info.

## Adding Field Info

---

1. Click **Add**.

The Add Field Info Item screen is displayed.

2. Choose the new field name from the drop-down menu.
3. Click **OK**.

The Edit Field Info Item screen is displayed for the new field info item.

4. Add a chunk to specify the method for populating the field.
5. Click **OK** on the Edit Field Info Item screen.
6. Click **Save** to save your changes to the current blueprint.

## Editing Field Info

---

1. From the Field Info tab, select an item from the list, and click **Edit**.
2. The Edit Field Info Item screen is displayed.
3. Add or edit a chunk.

## Adding a Chunk

---

1. Click **Add Chunk** to specify the method for populating the field.  
The Add Chunk screen is displayed.
2. Select either **String**, **Extracted**, or **Content Item Sequence** and enter the corresponding criteria.
  - If the String option is selected, you can enter a literal string (exact text) to use for the value of the chunk.
  - If the Extracted option is selected, the Add Chunk screen is displayed. The exemplar text is displayed in the center of the screen and the area of the report that corresponds with your selection is highlighted.
  - If the Content Item Sequence option is selected, the Add Chunk screen is displayed. From this screen, you can specify the starting number for the content item sequence, and the number of digits that will be used for the string representation of the sequence number.
3. After you have specified the appropriate criteria, click **OK**.

## Editing a Chunk

---

1. Select the Chunk Type to modify, and click **Edit Chunk**.  
The Edit Chunk for Field Info Item screen is displayed.
2. Make the necessary changes, then click **OK**.
3. Click **OK** on the Edit Field Info Item screen.
4. Click **Save** to save your changes for the current blueprint.

## USING PRIMARY AND ALTERNATE FILE FORMATS

---

The Primary File Format tab provides options for defining the file format of the published report that will be stored in the content server. The options include specifying the appearance of the report output, such as header, body, page setup, and so forth.

The Alternate File Format tab provides options for defining the secondary file format for the published report. The Alternate File is specified only if you want to check in another file format in addition to the Primary File Format specified. As with the Primary File, the

options for Alternate File Format include specifying the appearance of the report output, such as header, body, page setup, and so forth.

This section covers the following topics:

- ❖ [Primary/Alternate File Format Tab](#) (page -11)
- ❖ [Edit Primary/Alternate File Format Screen](#) (page -12)
- ❖ [Primary/Alternate File Options Screen](#) (page -14)
- ❖ [Text Separators](#) (page -16)
- ❖ [Setting Primary File Format Information](#) (page -17)
- ❖ [Setting Alternate File Format Information](#) (page -18)

You can enter criteria to specify the output file format for each report processed using the current blueprint.



**Note:** The procedure for setting primary file format and alternate file format is the same, except that the primary file format is set from the Primary File Format tab, and the alternate file format is set from the Alternate File Format tab. The following procedure refers to the Primary File Format tab, but you can also apply most of it to the Alternate File Format tab.

## Primary/Alternate File Format Tab

| Report Structure                  | Page Breaks | Content Item Breaks | Field Info                               | Primary File Format | Alternate File Format | Scheduling/Indexing |
|-----------------------------------|-------------|---------------------|--|---------------------|-----------------------|---------------------|
| <b>Primary File Format:</b>       |             | PDF                 | <b>Top Margin (inches):</b>              |                     | 0.500                 |                     |
| <b>Header Font Family:</b>        |             | Courier-Bold        | <b>New Page On Soft Page Break:</b>      |                     | Yes                   |                     |
| <b>Header Font Size (points):</b> |             | 9                   | <b>Repeat Header On Soft Page Break:</b> |                     | Yes                   |                     |
| <b>Header Font Color:</b>         |             | Yellow              |  |                     |                       |                     |
| <b>Body Font Family:</b>          |             | Courier-Bold        | <input type="button" value="Edit..."/>   |                     |                       |                     |
| <b>Body Font Size (points):</b>   |             | 9                   |  |                     |                       |                     |
| <b>Body Font Color:</b>           |             | Magenta             |  |                     |                       |                     |
| <b>Page Width (inches):</b>       |             | 11.000              |  |                     |                       |                     |
| <b>Page Height (inches):</b>      |             | 8.500               |  |                     |                       |                     |
| <b>Left Margin (inches):</b>      |             | 0.750               |  |                     |                       |                     |

The Primary File Format tab shows characteristics of the primary file Report Parser will check into Oracle Content Server. Access this tab by selecting **Edit—Add Blueprint** from the Blueprint Manager screen, then select the Primary File Format tab.

The Alternate File Format tab shows characteristics of the alternate, or secondary file Report Parser will check into Oracle Content Server. Access this tab by selecting **Edit—**

**Add Blueprint** from the Blueprint Manager screen, then select the Alternate File Format tab.

## Edit Primary/Alternate File Format Screen

---



Access the Edit Primary or Alternate File Format screen by clicking **Edit** on the Primary or Alternate File Format tab. Use it to specify the file format for the primary or alternate file that Report Parser will check into Oracle Content Server.

The Report Parser currently supports conversion to these file formats:

- ❖ PDF
- ❖ Text
- ❖ XML
- ❖ HTML
- ❖ Passthru (meaning “whatever the input format is”)



**Note:** The maximum file name length is 80 characters and the file name extension cannot exceed eight characters.

### Calculation for the input file name length:

```
[file name + ( the string "-temp-" + the string of #OfPageHeadersInFile +
the string ".txt" ) ] <= 80
```

Thus:

```
[file name + ( 6 + nnnn + 4 ) ] <= 80
```

**Example 1:** If there are 25 Page Headers of "PAGE" in the report, the maximum file name length is calculated:

```
[file name + ( the string "-temp-" + 25 + the string ".txt" ) ] <= 80
```

```
MaxFileNameLength = [ 80 - 6 - 2 - 4 ] = 68 characters
```

**Example 2:** If there are 2500 Page Headers of "PAGE" in the report, the maximum file name length is calculated:

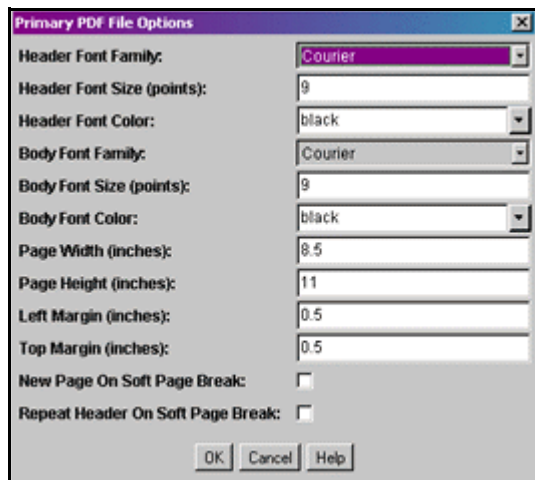
```
[file name + ( the string "-temp-" + 2500 + the string ".txt" ) ]
<= 80
```

```
MaxFileNameLength = [ 80 - 6 - 4 - 4 ] = 66 characters
```



**Caution:** The limits on the length of the file name are dependant on the size of the database fields. Depending on the Content Server instance, the file name may have been manually expanded or increased through the installation of the Folders component. In general, if the Folders component is installed, it is expected that the file name length limit is 255 characters and the file extension limit is also 255 characters.

## Primary/Alternate File Options Screen



Access this screen by selecting **Options** on the Edit Primary or Alternate File Format screen. Use it to specify some of the display characteristics of the primary or alternate file. Depending on the file format selected on the Edit Primary/Alternate File Format screen, one of four screens is displayed. The table following the figure explains the contents of each of these screens.

The following table defines the available options for each of these file formats.

| Field                     | Applicable File Formats | Description   |
|---------------------------|-------------------------|---|
| Header Font Family        | PDF, HTML, XML          | The font family to use for each page header. For example, Courier, Helvetica, and so forth.<br>For PDF, the Header Font Family (and Body Font Family) value is chosen from a drop-down list. For XML and HTML, the font family name is typed into a text field. |
| Header Font Size (points) | PDF, HTML, XML          | The font size to use for each page header.  |
| Header Font Color         | PDF, HTML, XML          | The color of the font of the header when viewed in the output file.   |

| <b>Field</b>                     | <b>Applicable File Formats</b> | <b>Description</b>  |
|----------------------------------|--------------------------------|---|
| Body Font Family                 | PDF, HTML, XML                 | The font family of the body of the report.  |
| Body Font Size (points)          | PDF, HTML, XML                 | The font size of the body of the report.  |
| Body Font Color                  | PDF, HTML, XML                 | The font color for the body of the report.  |
| Page Width (inches)              | PDF                            | The page width, in inches.  |
| Page Height (inches)             | PDF                            | The page height, in inches.   |
| Left Margin (inches)             | PDF                            | The width, in inches, of the left margin.   |
| Top Margin (inches)              | PDF                            | The height, in inches, of the top margin.   |
| New Page On Soft Page Break      | PDF                            | Specify Yes or No - regarding whether a new page is to be generated whenever a soft page break indicator is recognized in the input report. |
| Repeat Header On Soft Page Break | PDF, Text                      | Specify Yes or No - regarding whether the header is to be repeated at each soft page break.   |
| Header Font Bold                 | HTML, XML                      | (Check box) Selected indicates bold header font.  |
| Header Font Italic               | HTML, XML                      | (Check box) Selected indicates italic header font.  |
| Body Font Bold                   | HTML, XML                      | (Check box) Selected indicates bold body font.  |
| Body Font Italic                 | HTML, XML                      | (Check box) Selected indicates italic body font.  |

| Field                     | Applicable File Formats | Description  |
|---------------------------|-------------------------|--|
| Header on First Page Only | HTML, XML               | (Check box) Selected indicates header will display on first page only.   |
| Soft Page Break           | HTML, XML               | Specify the representation of a soft page break to be displayed, if applicable. (For HTML, specify the representation of the page-break in HTML, For example: <hr> For XML, specify the representation of the page-break in XML. For example: <hr/>) |
| Header/Body Separator     | HTML, XML, Text         | Specify separator between header and body, if any. (For HTML format, specify separator in HTML. For XML, specify separator in XML.)  |
| (Hard) Page Separator     | HTML, XML, Text         | Specify separator to be displayed between pages, if any. (For HTML format, specify separator in HTML. For XML, specify separator in XML.)  |
| Line Endings              | Text                    | Specify line endings: CR, CR/LF, or LF (CR = Carriage Return, LF = Line Feed)  |



**Note:** Font information affects how many lines display per page, and therefore affects how many pages each output file (content item) contains.

## Text Separators

There are three types of text separators screens:

- ❖ Header
- ❖ Hard Page Break
- ❖ Soft Page Break.

Access these screens from the Primary or Alternate Text File Options screen. Use them to set the separator line type, literal string, and separator width.

| Field               | Description   |
|---------------------|---|
| Separator Line Type | <p>This option controls the string representation of a line that is inserted in the output documents, for example, between header and body, or to indicate the location of a soft or hard page break.</p> <p>None: No line will be used as a separator</p> <p>Blank Line: Space, or an empty line is used as a separator</p> <p>Form Feed: ASCII character 12 (also known as the “form feed” character, “control-L”, and “\u000C”) is used. In old, ASCII-controlled line printers (or in software emulating one), the form feed character is interpreted as <i>start a new page</i>.</p> <p>Pattern: The literal string will be used as a separator line, repeating until the separator width is reached. Generally, use asterisks (*) or dashes (-).</p> <p>String: A literal string is used as a separator line. It is not repeated.</p> |
| Literal String      | The actual text or symbol pattern to use as the separator line.   |
| Separator Width     | The width of the separator line.  |

## Setting Primary File Format Information

To set primary file format information, perform these tasks:

1. Select the Primary File Format tab from the Edit Blueprint screen.
2. Click **Edit**.  
The Edit Primary File Format screen is displayed.
3. Select the appropriate format (Text, PDF, XML, HTML, or Passthru) from the Primary File Format drop-down menu. Note that the Alternate File Format can be set to **None**, but you must specify a Primary File Format.
4. Click **Options** to set the specific format information for the chosen file type.
5. Specify the options for the file format type, and click **OK**.



**Note:** Font information affects how many lines display per page, and therefore affects how many pages each output file contains.

## Setting Alternate File Format Information

---

To set alternate file format information, select the Alternate File Format tab and follow steps 2 through 5 above.

## VALIDATING BLUEPRINTS

---

This section covers the following topics:

- ❖ [About Validating Blueprints](#) (page -18)
- ❖ [Blueprint Validation Results for <Blueprint Name> Screen](#) (page -19)
- ❖ [Validating Blueprints](#) (page -19)
- ❖ [Disabling the Validation Process](#) (page -20)

### About Validating Blueprints

---

Report Parser provides functionality that lets you validate your blueprint prior to actually parsing your report. This is useful because you can examine any errors that would otherwise cause problems with the parsing. Additionally, it is necessary to validate any blueprints from previous versions of Report Parser, because they will all be invalid until validation.

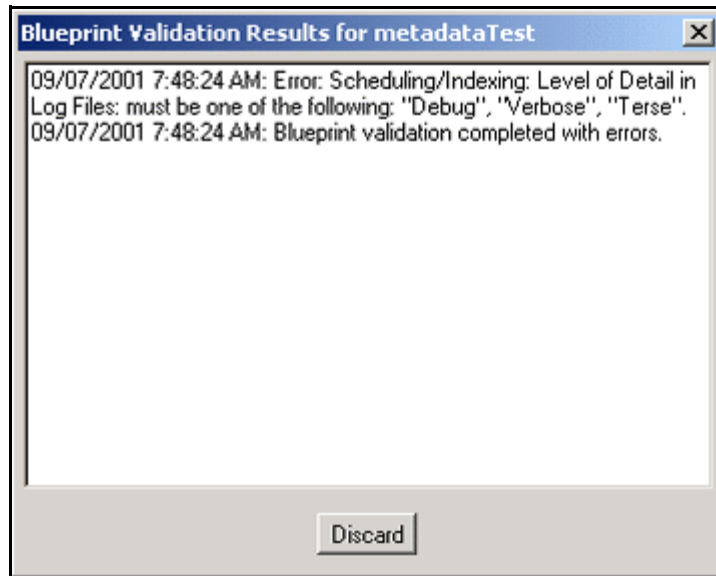
**Figure 3-1** Blueprint Manager Screen Listing Invalid Blueprints.

The screenshot shows a window titled "Report Parser Blueprint Manager for Stellent51\_010828" with a menu bar (Options, Edit, View, Run, Help). The main area displays "Report Parser Blueprint Manager" and a table of blueprints. The table has columns for Name, Description, Watch Direct..., Scheduled, Next Run, and Status. Three blueprints are listed, all with a status of "Invalid".

| Blueprints:  |   |                 |           |          |         |
|--------------|---|-----------------|-----------|----------|---------|
| Name         | Description                               | Watch Direct... | Scheduled | Next Run | Status  |
| fad_trg      | Invalid Blueprint in file: c:/stellent... |                 | onDemand  |          | Invalid |
| metadataTest | Invalid Blueprint in file: c:/stellent... |                 | onDemand  |          | Invalid |
| Vogon        | Invalid Blueprint in file: c:/stellent... |                 | onDemand  |          | Invalid |

## Blueprint Validation Results for <Blueprint Name> Screen

---



Access this screen by selecting **Validate** on the Edit Blueprint *name* or Edit New Blueprint screen. Use it to identify errors in your blueprint. When you are done viewing and correcting your errors, click **Discard** to dismiss the Blueprint Validation Results dialog. Then, save your blueprint.

## Validating Blueprints

---

To validate a blueprint, perform these tasks:

1. Select a blueprint on the Blueprint Manager screen.
2. Select **EditEdit Blueprint**.

The Edit Blueprint screen is displayed.

3. Click **Validate**.

The Blueprint Validation Results for *blueprint name* screen is displayed.

4. Correct any of the errors and warnings listed.

5. If you are validating blueprints from a previous version, it is likely that you will need to perform these tasks:
  - Add a Content ID on the Field Info tab.
  - Adjust your *Find Reports In* directory, as defined on the Scheduling/Indexing tab.
6. Click **Discard** to dismiss the Blueprint Validation Results dialog.
7. Save your blueprint.

## Disabling the Validation Process

---

Validation is primarily used during the blueprint design process. Since the checkin process performs its own validation, you can manually disable the validation process by setting a configuration variable. Changing the variable's default value (false) to true suppresses validation during the execution of a parsing run and reduces the additional overhead.

1. In a text editor, open the config.cfg file:  

```
<install_dir>/config/config.cfg
```
2. Add the following line:  

```
SupressValidation=true
```
3. Save and close the config.cfg file.
4. Restart Content Server and the web server to apply the changes.

# PROCESSING REPORTS

## OVERVIEW

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This section covers the following topic:

- ❖ [Processing Options](#) (page -1)

## PROCESSING OPTIONS

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This section covers the following topics:

- ❖ [Scheduling/Indexing Tab](#) (page -1)
- ❖ [Edit Scheduling/Indexing Screen](#) (page -2)
- ❖ [Processing Reports Manually](#) (page -4)
- ❖ [Processing Reports Automatically](#) (page -5)

Use the Scheduling/Indexing tab to configure the processing options for each report type (or blueprint). From this tab you can specify to run your reports manually, schedule them for automatic processing, and configure the options for automatic report processing.

- ❖ For a new blueprint, access this tab by selecting **Edit—Add Blueprint** from the Blueprint Manager screen, then select the Scheduling/Indexing tab.
- ❖ For an existing blueprint, access this tab by selecting **Edit—Edit Blueprint** from the Blueprint Manager screen, then select the Scheduling/Indexing tab



**Note:** To optimize your processing runs by reducing the additional overhead from validation, you can manually disable the validation process. Refer to [Disabling the Validation Process](#) (page -20).

## Scheduling/Indexing Tab


| Report Structure                      | Page Breaks | Content Item Breaks | Field Info | Primary File Format | Alternate File Format | Scheduling/Indexing                        |
|---------------------------------------|-------------|---------------------|------------|---------------------|-----------------------|--|
| Enabled for Scheduling:               |             |                     |            |                     |                       | Yes  |
| Find Reports in:                      |             |                     |            |                     |                       | c:/stellent/custom/reportparser/data/input |
| Run:                                  |             |                     |            |                     |                       | On Demand                                  |
| Indexing:                             |             |                     |            |                     |                       | Content and Field Info                     |
| Checkin Failures Before Aborting Run: |             |                     |            |                     |                       | 0  |
| Number of Concurrent Checkins:        |             |                     |            |                     |                       | 4  |
| Level of Detail in Log Files:         |             |                     |            |                     |                       | Debug                                      |

The Scheduling/Indexing tab shows characteristics of the processing options for each report type (or blueprint). From this tab you can specify to run your reports manually, schedule them for automatic processing, and configure the options for automatic report processing. Access this tab by selecting **Edit—Add/Edit Blueprint** from the Blueprint Manager screen, then select the Scheduling/Indexing tab.

## Edit Scheduling/Indexing Screen

| Edit Scheduling/Indexing  |   |
|---|---|
| Enabled for Scheduling:   | <input checked="" type="checkbox"/>   |
| Find Reports in:  | c:/stellent/custom/reportparser/data/input/   |
| Run:  | On Demand   |
| Run Interval, in Minutes:   | 10  |
| Scheduled Days to Run:  | <input checked="" type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat |
| Scheduled Time to Run (00:00 - 23:59):  | 01 Hour : 00 Minute   |
| Indexing:   | Content and Field Info  |
| Checkin Failures Before Aborting Run:   | 0   |
| Number of Concurrent Checkins:  | 4   |
| Level of Detail in Log Files:   | Debug   |
| <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/> |   |

The Edit Scheduling/Indexing screen lets you edit the characteristics of the processing options for each report type (or blueprint). From this screen you can elect to run your reports manually, schedule them for automatic processing, and configure the options for automatic report processing. Access this tab by selecting **Edit—Add Blueprint** from the Blueprint Manager screen, select the Scheduling/Indexing tab, then select Edit.

| Field                  | Description  |
|------------------------|--|
| Enabled for Scheduling | Whether to schedule the report for automatic processing. (Options: Yes or No)  |
| Find Reports in:       | The location where the generated report is placed when ready for processing through Report Parser. This might also be referred to as the watched directory.  |
| Run                    | <p>How often the watched directory will be scanned for reports to process. Options are:</p> <p><b>On Demand:</b> manual mode</p> <p><b>At a Fixed Interval:</b> automated processing every n minutes</p> <p><b>On a Fixed Schedule:</b> automated processing on scheduled day(s) and time(s)</p> <p> <b>Note:</b> After an input report is processed, Report Parser moves it from the watched directory (for example, <i>C:/&lt;install_dir&gt;/&lt;instance_name&gt;/custom/reportparser/data/Input</i>), and moves it to the Save Input directory (for example: <i>C:/&lt;install_dir&gt;/&lt;instance_name&gt;/custom/reportparser/data/SaveInput</i>).</p> |

| Field                                | Description  |
|--------------------------------------|--|
| Indexing                             | <p>The indexing method to use for the published report. This relates to how the report is searched upon from users of the content server. Options are:</p> <p><b>Content and field information:</b> Search engine will index both the content of the report and its associated Field Info fields. (Provides optimum search capability on content server.)</p> <p><b>Field Info Only:</b> Search engine will index only the report's associated Field Info. (Users on the content server will be limited to searching on Field Info fields only.)</p> |
| Checkin Failures Before Aborting Run | <p>An operational parameter that allows the check in process to run up to the specified number of failures. The default value is zero, which means to quit on the first checkin failure.</p>   |
| Number of Concurrent Checkins        | <p>A timing parameter that limits the number of output files that can be checked in to Content Server simultaneously, that is, by parallel threads within the Report Parser process. Setting this value to zero forces the output files to be checked in serially (i.e., document[N+1] can't be checked in until the checkin of document[N] has finished).</p>   |
| Level of Detail in Log Files         | <p>The amount of detail in the log reports. Options are:</p> <p><b>Terse:</b> lowest level of detail</p> <p><b>Verbose:</b> [in version 5.1, same level of detail as terse]</p> <p><b>Debug:</b> highest level of detail</p>   |



**Note:** To verify the accuracy of your blueprint settings, always perform a test run prior to scheduling your blueprint for automated processing.

## Processing Reports Manually

---

To set up a blueprint to manually process your reports, perform the following tasks:

1. Create a blueprint.
2. Verify that the report is, or will be, placed in the watched directory prior to the scheduled processing time. You can find this information in the **Find Reports In** field on the Scheduling/Indexing tab.
3. Select the Scheduling/Indexing tab from the Edit Blueprint screen.
4. Click **Edit**.
5. Set Run to On Demand.



**Note:** You can always perform the RunRun Now and RunTest Run commands on a selected blueprint, regardless of the value of Run.

6. Click **OK** on the Edit Scheduling/Indexing screen.
7. Click **Save** on the Edit Blueprint screen.
8. Select **Run—Run Now** on Report Parser: Blueprint Manager screen.

To verify that the report was successfully processed and checked into the content management system, perform the following tasks:

1. Check the log files. Report Parser's “top level” log file is typically `<install_dir>/<instance_name>/custom/reportparser/schedulerlog.txt`. Entries are made in this log file whenever a blueprint is run, whether automatically or manually. The entries in schedulerlog.txt point to the path(s) of the detailed log file(s) for a particular run. These detailed log files are located in the `<install_dir>/<instance_name>/custom/reportparser/data/Log/` directory.
2. Access your content management system.
3. Search for the report by known Field Info criteria. For example, if you specified the literal string “My Published Report Title” for the Title Field Info item when you set up your blueprint, conduct a search within your content management system for files containing the title “My Published Report Title”
4. Verify that the file resides on the content server, and that the report has been formatted and indexed correctly according to the settings you specified when you configured the blueprint. You can do this either through the browser interface to Oracle Content Server, or through Repository Manager.

## Processing Reports Automatically

---

To set up a blueprint to automatically process your reports, perform the following tasks:

1. Create a blueprint.
2. Verify that the report is, or will be, placed in the watched directory prior to the scheduled processing time. You can find this information in the **Find Reports In** field on the Scheduling/Indexing tab.
3. Select the Scheduling/Indexing tab from the Edit Blueprint screen.
4. Click **Edit**.
5. Set Run to On a Fixed Schedule or At a Fixed Interval, and set the schedule or interval.
6. Click **OK** on the Edit Scheduling/Indexing screen.
7. Click **Save** on the Edit Blueprint screen.

To verify that the report was successfully processed and checked into your content management system after the specified scheduled time has passed, perform the following tasks:

1. Check the log files. Report Parser's "top level" log file is typically `<install_dir>/<instance_name>/custom/reportparser/schedulerlog.txt`. Entries are made in this log file whenever a blueprint is run, whether automatically or manually. The entries in schedulerlog.txt point to the path(s) of the detailed log file(s) for a particular run. These detailed log files are located in the `<install_dir>/<instance_name>/custom/reportparser/data/Log/` directory.
2. Access your content management system.
3. Search for the report by known Field Info criteria. For example, if you specified the literal string "My Published Report Title" for the Title Field Info item when you set up your blueprint, conduct a search within your content management system for files containing the title "My Published Report Title."
4. Verify that the file resides on the content server, and that the report has been formatted and indexed correctly according to the settings you specified when you configured the blueprint. You can do this either through the browser interface to Oracle Content Server, or through Repository Manager.

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