XMLRG Documentation

RenderX , www.renderx.com

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1. Overview

XMLRG Web-based application is intended for corporate data integration into reports and transform them into the high-quality printed documents (e.g. PDF, PostScript, AFP).
The application works with corporate Data Bases (DBs) of arbitrary structure, i.e. classic relational as well as post-relational based on XML-documents processing, like Oracle XML DB.

Web-client
The application uses web interface for user s access to reports and manages data merging process (e.g. filtering data). The client-side was tested using the most popular internet browsers: Internet Explorer 6, 7; Firefox 1.5, 2.0, Opera 8, Konqueror. A user can login from any computer   only web browser is needed.

Easy Deployment of the Server-side
Easy installation process and installation tuning are implemented. The installer allows to create all repositories needed for successful application running, including Tomcat configuration.

Simple Report s Template Creating Process Based on Microsoft Word Environment
The environment for the creation and modification of templates is well known Microsoft Word 2003   2007 and the desktop application, working together with Microsoft Word, to describe data in the report in a comprehensible way for a user. The application allows to create a custom report using Microsoft Word   no special editors, no programming knowledge needed.

Sophisticated Data Embedding Process
The application allows to create not just reports based on data stored in DB, but add features like filtering, totals and subtotals, formatting styles, etc.

Can work with any customer DB (JDBC-support needed, XML API must be supported)
Chargeable remote web-service (SOAP capabilities) will be implemented in future releases.

Dynamic e-forms supported
It is possible to create a custom report using an existing template to fill it out manually and to receive an output report "on-the-fly".

Multiple report formats
The application allows to choose different output formats defined by XEP   PDF, Postscript, AFP.

2. Installation

2.1. Required Software (Server-side, Template Designer)

Oracle 8i, 9i or 10i   with XML DB option!

Java 5

Tomcat 5.5.XX

2.2.   Operation System Compatible with XMLRG Application

Windows 2003 Server

Linux 2.6

RedHat

Fedore Core 10

Suse 10

2.3.   Inside the Product Package

Installation Bundle includes the following packages:

WAR   Web Archive (zip file)

Swing XMLRG Installer

XEP 4.9

Xerces

XEdit API

2.4.   How to Install XMLRG (Server-side Installation)

1. Run the installation file. Welcome screen appears. Click **Next**.

Fig. 2.4.1. Welcome screen.

2. Enter the path for **.war** file and click **Next**.

Fig. 2.4.2. Creating the path to the .war file.

3. Create the paths for xep.xml and Tomcat. Click **Next**.
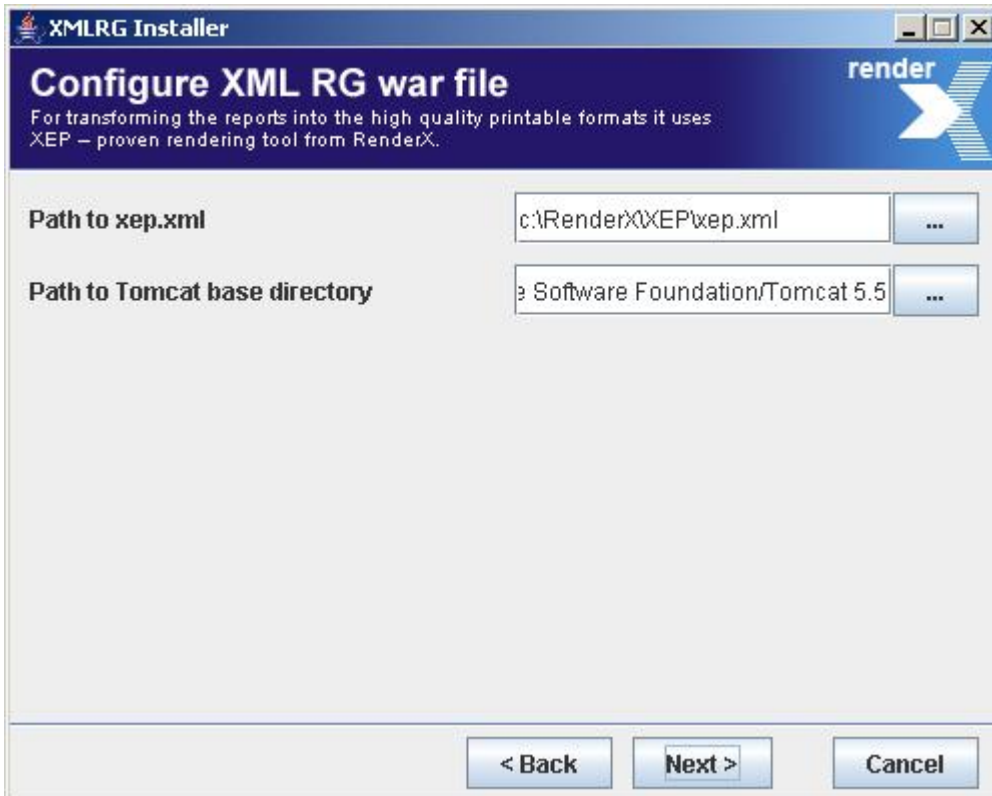

Fig. 2.4.3. Creating the paths to the xep.xml and Tomcat.

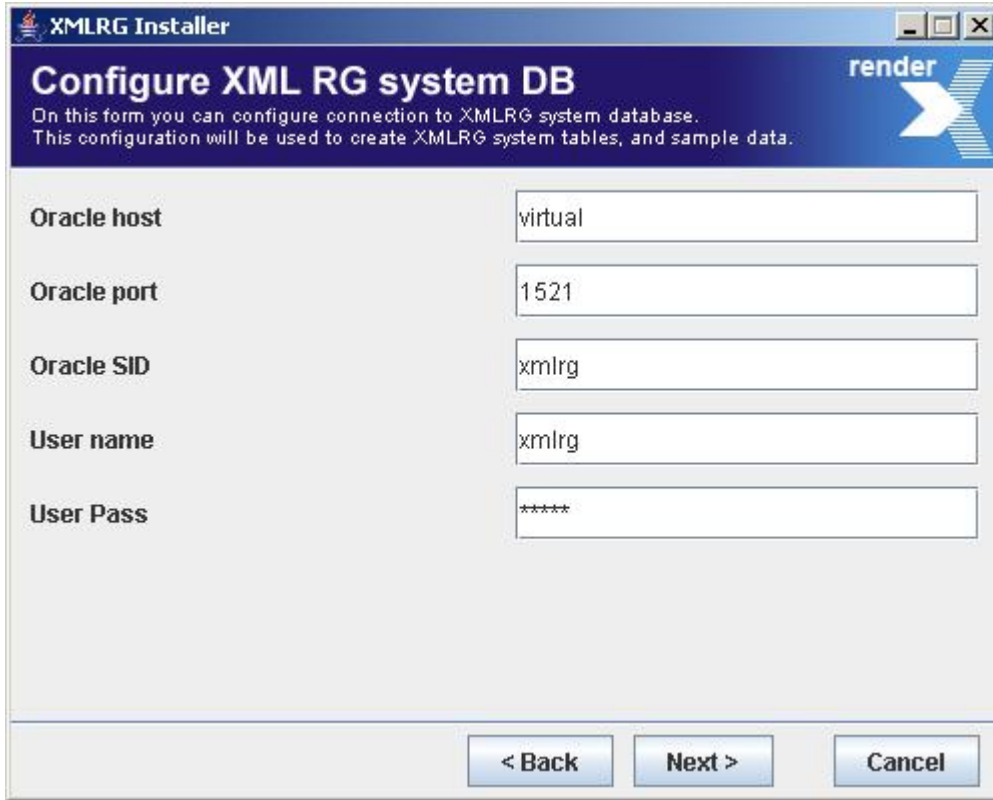4. Configure connection to XMLRG database. Click **Next**.

Fig. 2.4.4. Creating the paths to the xep.xml and Tomcat.
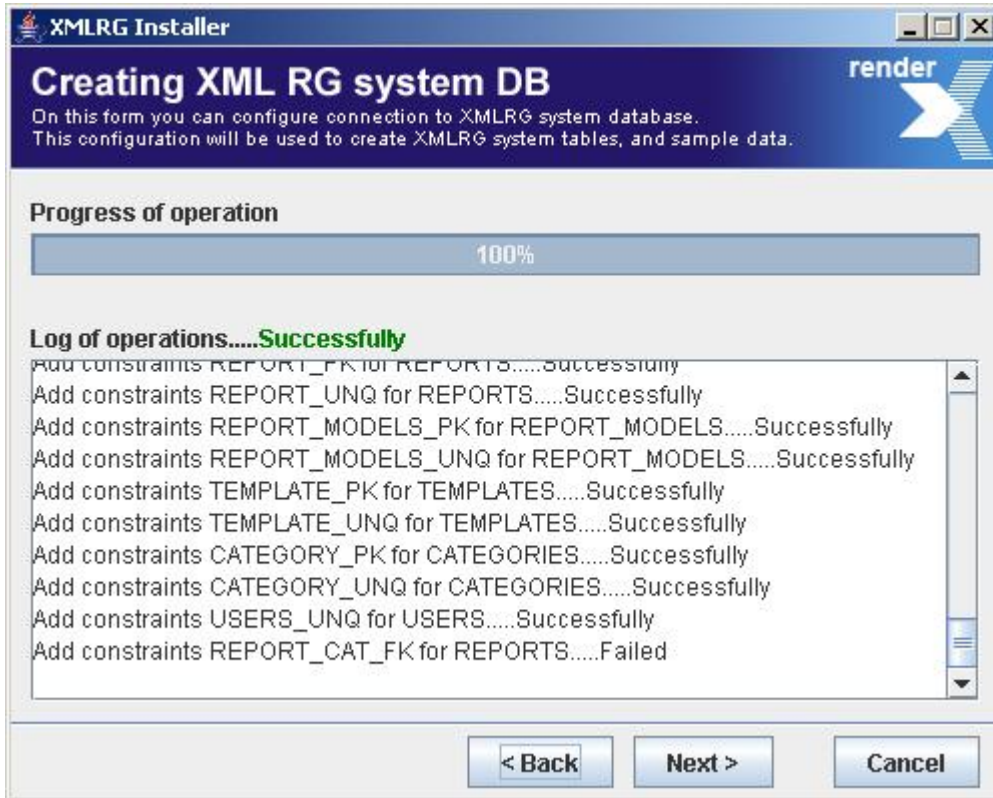
5. Create XMLRG system database.

Fig. 2.4.5. Creating XMLRG system DB.
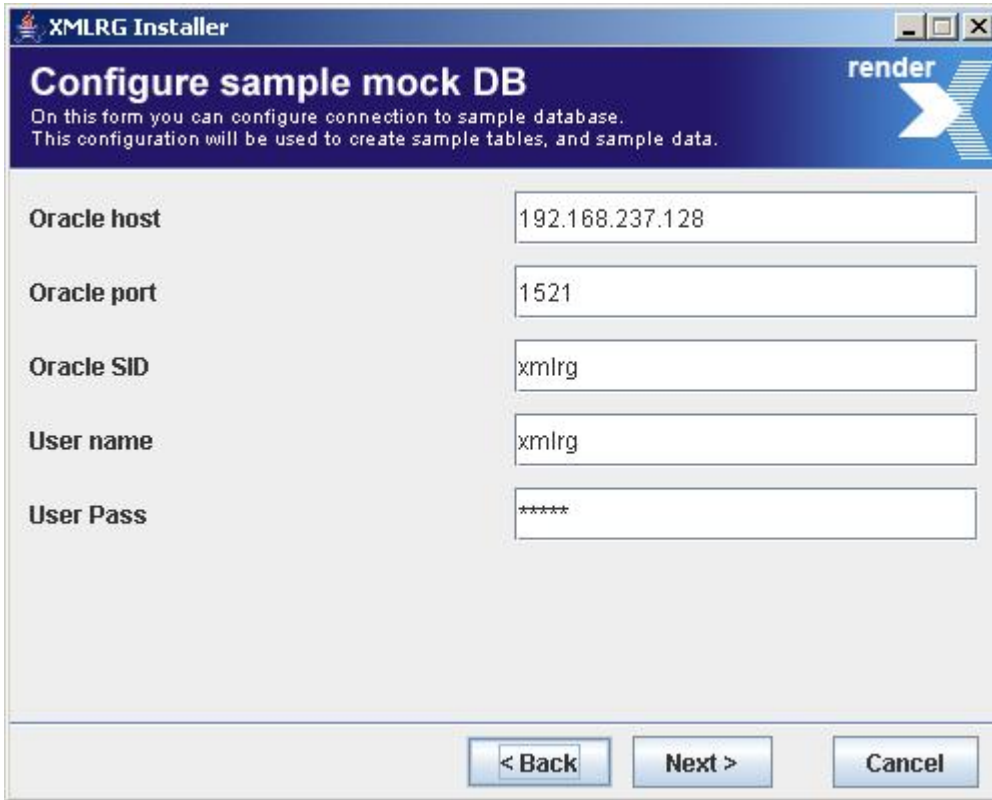
6. Configure sample mock database.

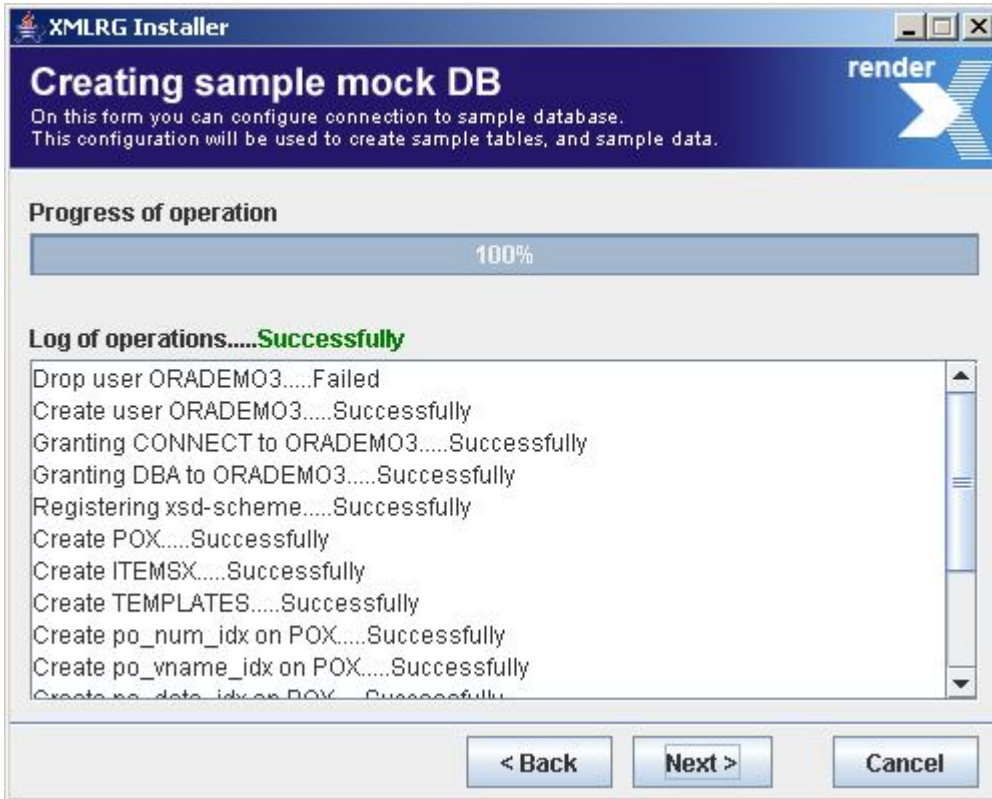**Fig. 2.4.6. Configuring sample mock DB.**

7. Create sample mock database.

Fig. 2.4.7. Creating sample mock DB.

8. Click Finish to end installation process.

Fig. 2.4.8. End of installation.

3. Getting Started

3.1. Simple Report Generation

1. Open Web browser.

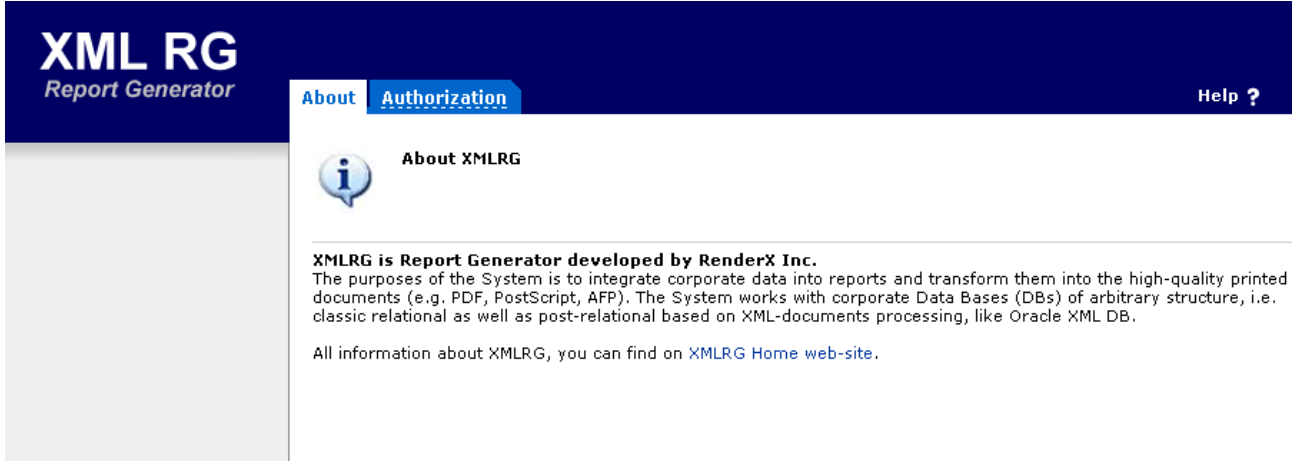2. Connect to http://www.pdfpower.com:1977/xmlrg/.

Fig. 3.1.1. Connect to XMLRG.

3. Click Authorization tab.

4. Enter Username and Password (**test/test** if you get connected for the first time).
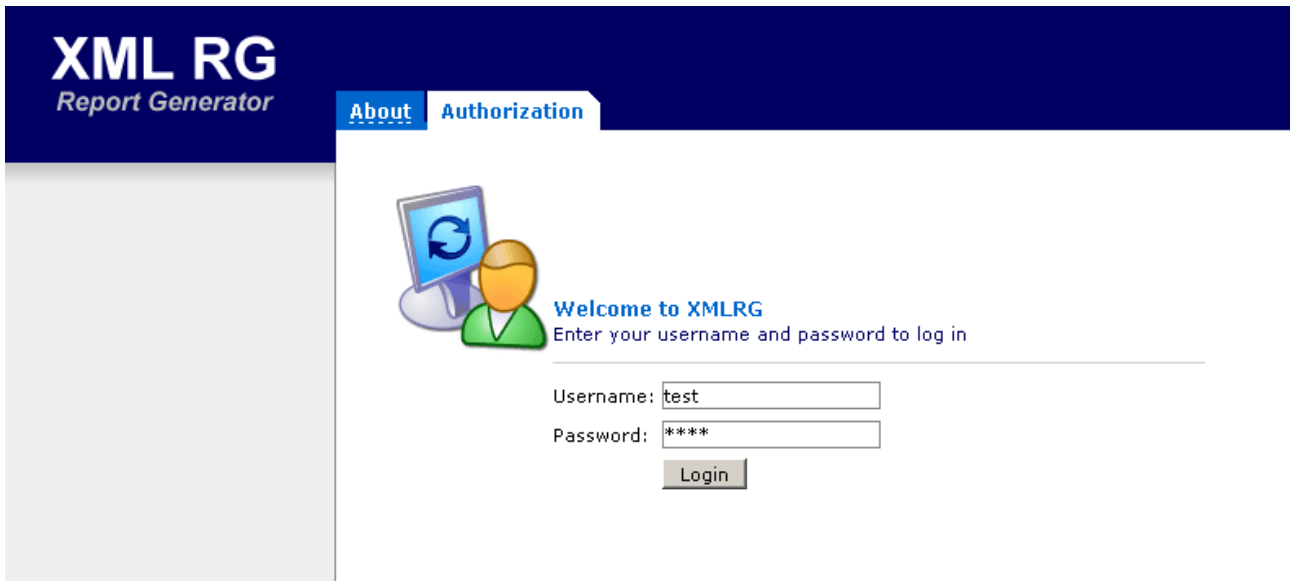

Fig. 3.1.2. Log in to XMLRG.

5. On the left pane, select the report you want to generate (for example, **Purchase Order**). After that available report styles will appear.
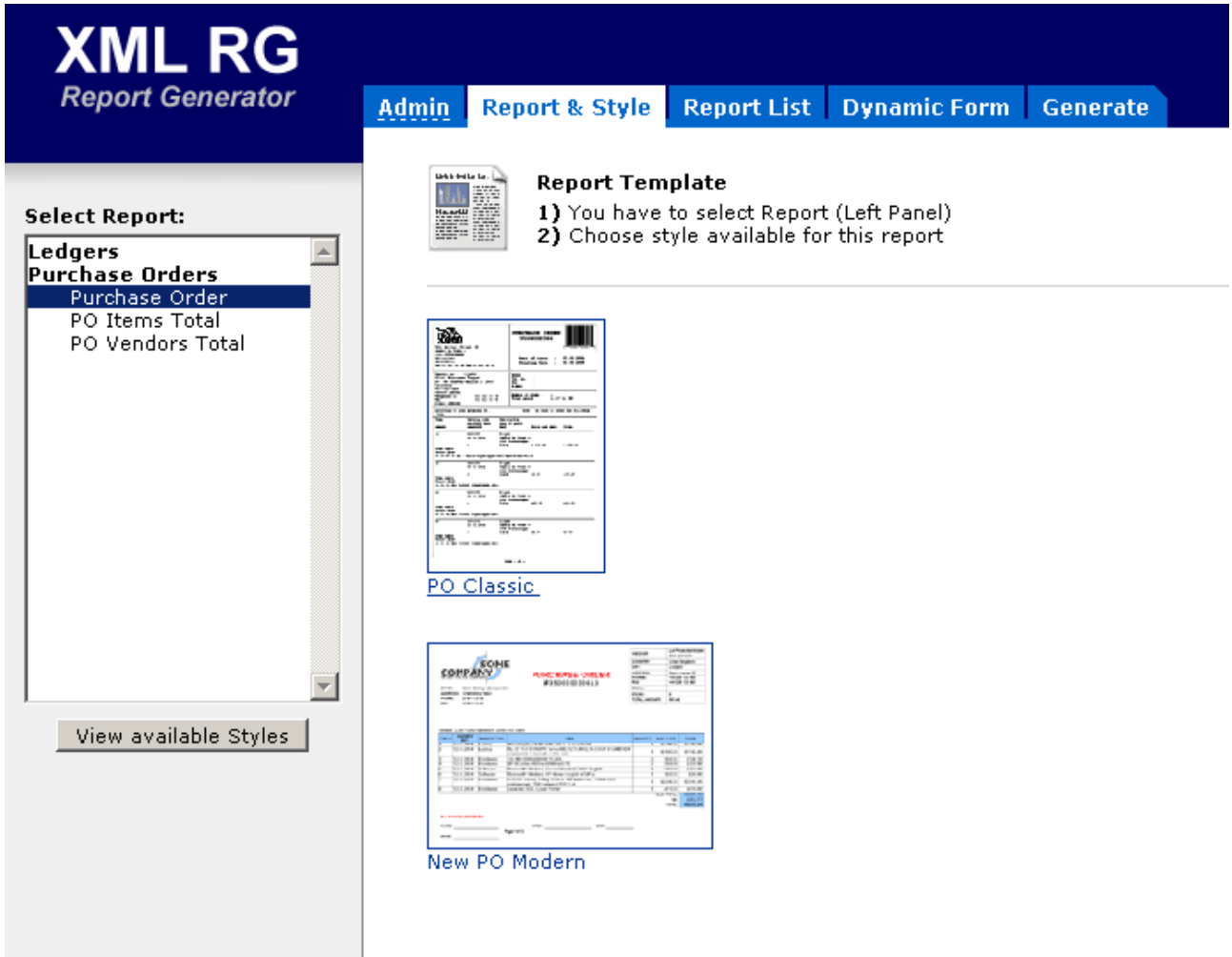

Fig. 3.1.3. Click Purchase Order . Available report templates will appear.

6. Let s pick up **PO Classic** type. The application retrieves all available PO s from the customer s database.
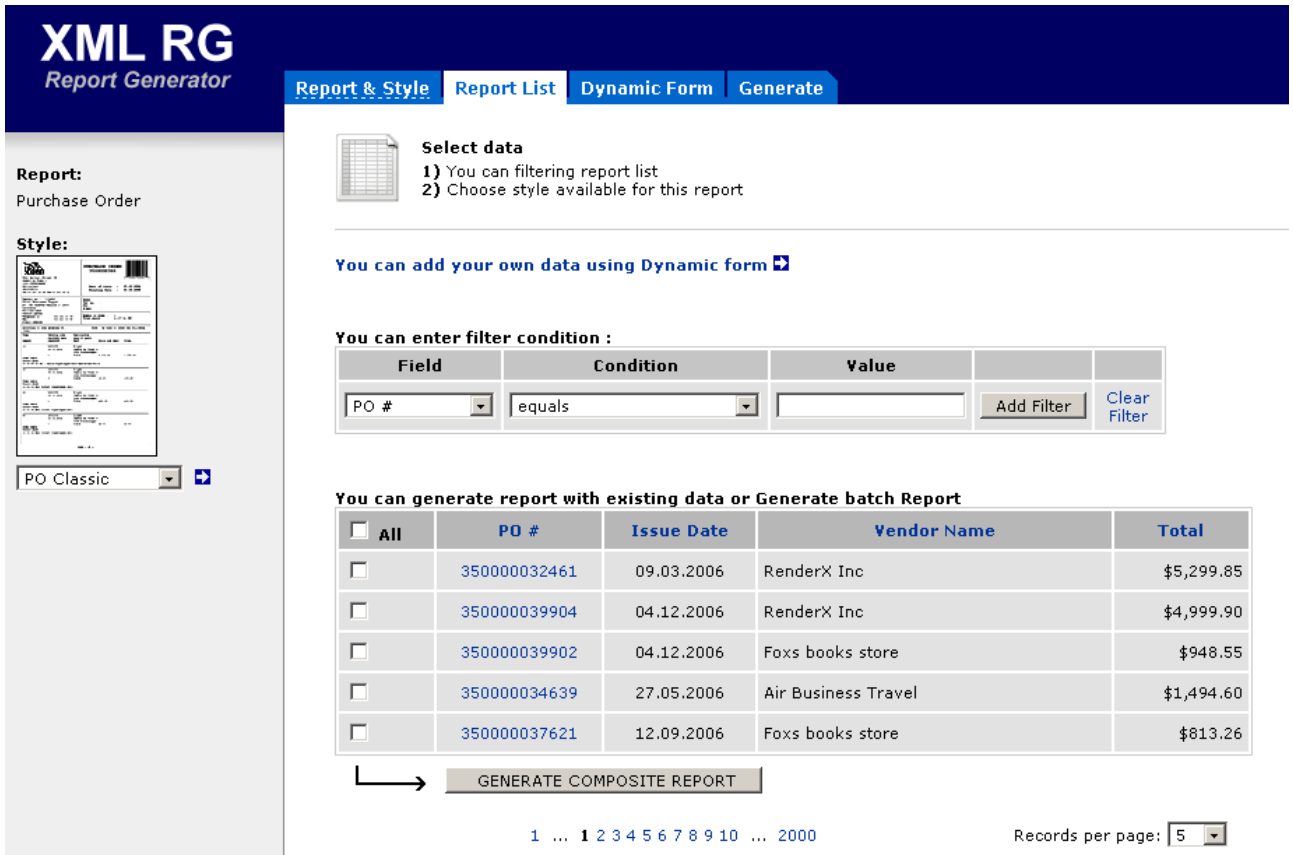
Fig. 3.1.4. List of available PO s.

7. It is possible for a user to filter out data using any field with conditions you want. Also a user can create a composite report checking several PO s and clicking **GENERATE COMPOSITE REPORT** button.

8. Now we can generate the report for the particular PO. Click the PO you want to create report for.

9. On the following tab choose the output format and paper size and click **GENERATE** button. The report will be opened in a separate window.
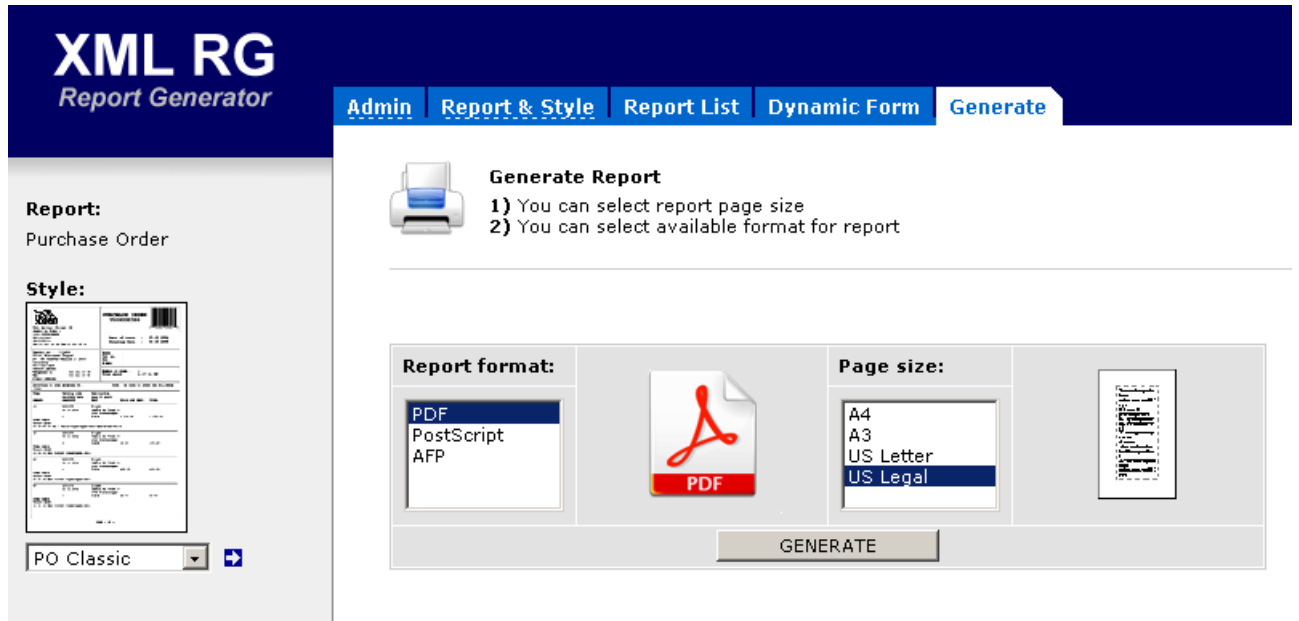

Fig. 3.1.5. Choose report format and the page size and generate the report.

3.2.   Report Generation for Dynamic E-form

1. Open Web browser.

2. Connect to http://www.pdfpower.com:1977/xmlrg/login.htm.

3. Enter Username and Password (**test/test** if you get connected for the first time)
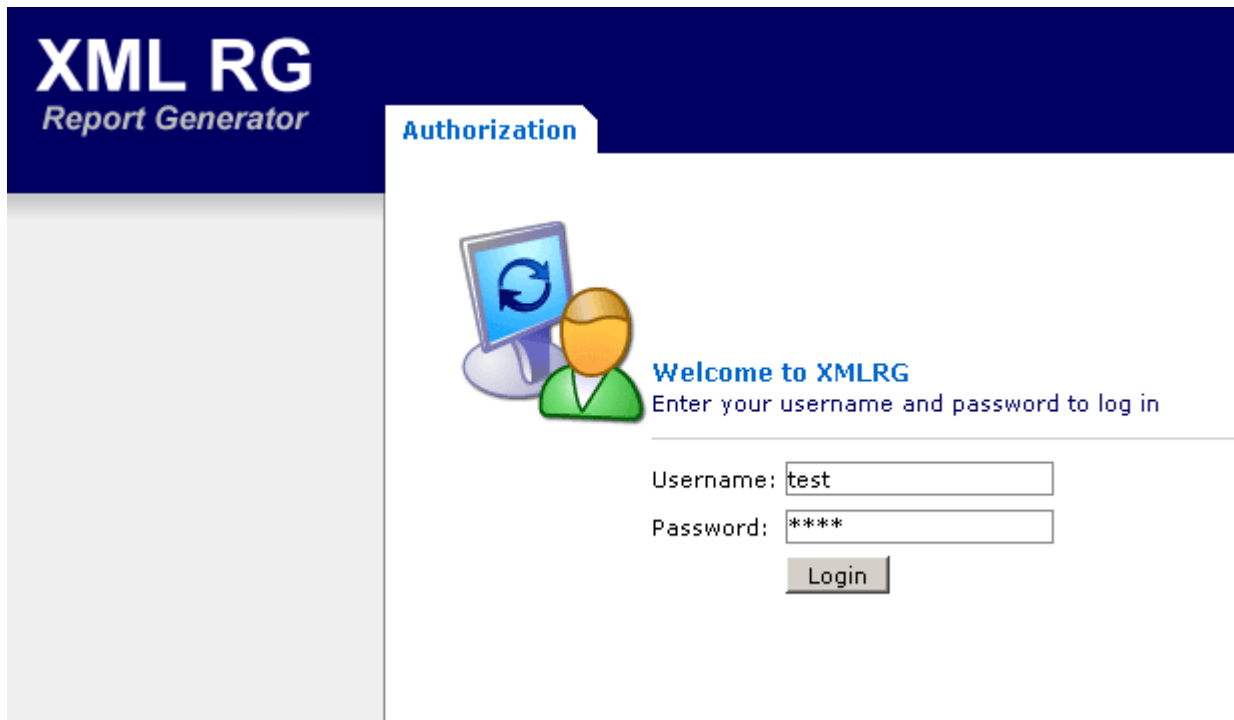

Fig. 3.2.1. Log in to XMLRG.

4. On the left pane, select the report you want to generate. After that available report types will appear.
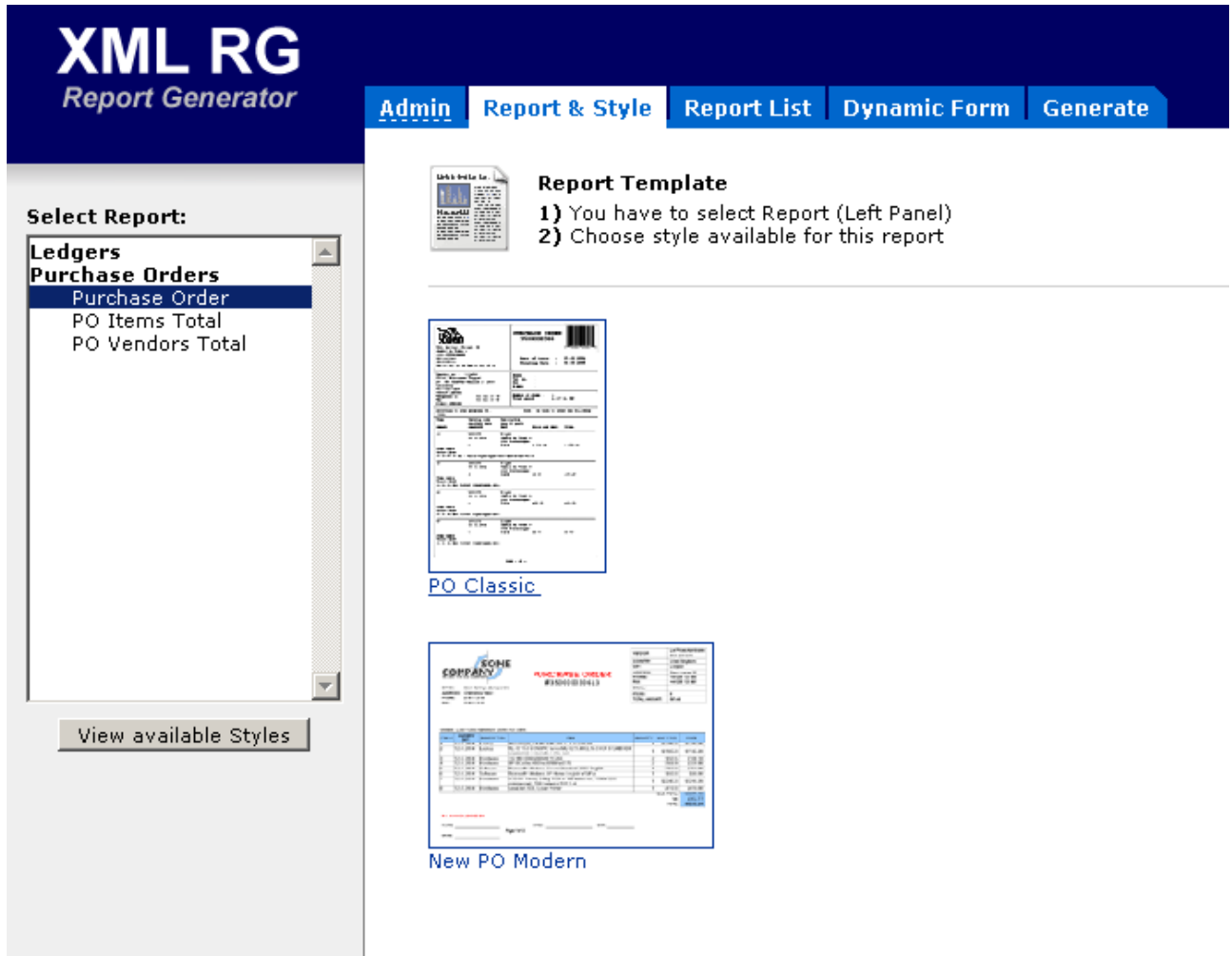

Fig. 3.2.2. Click Purchase Order . Available report templates will appear.

5. Let s pick up **PO Classic** type. The application retrieves all available PO s from the database.
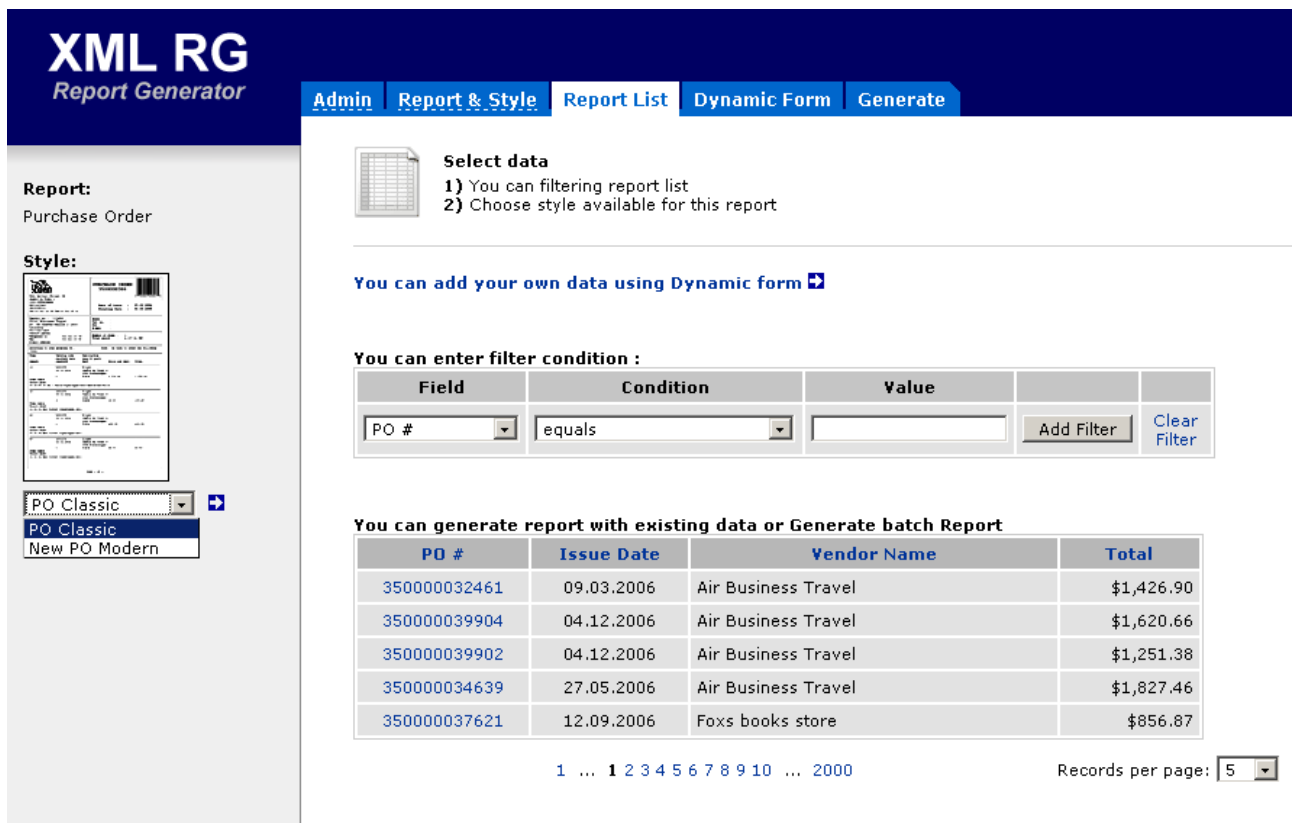
Fig. 3.2.3. List of available PO s.

6. Click the link **You can add your own data using Dynamic form .**

7. Fill out all the fields you want to populate. You can add or delete items and sub-items as you wish.
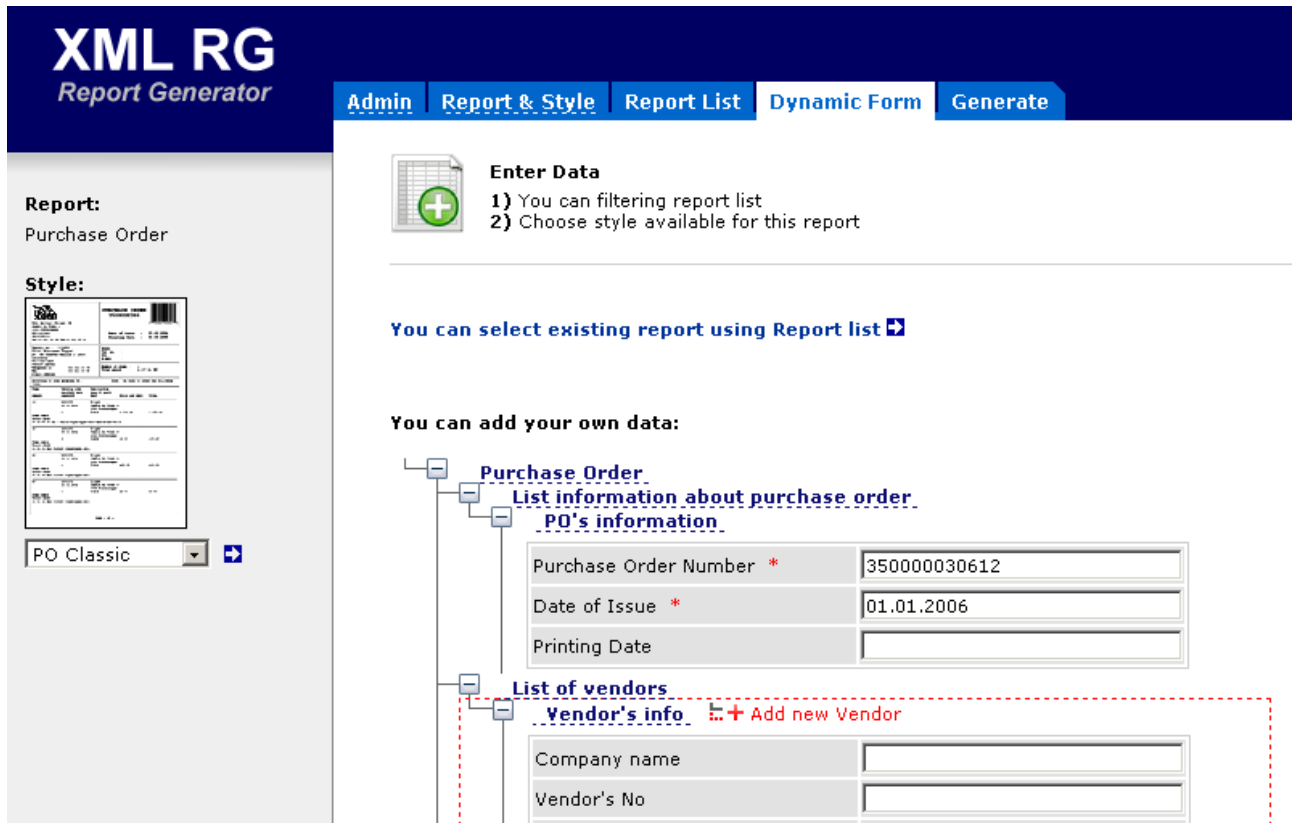
Fig. 3.2.4. A user can create his own report populating the fields on-the-fly ..

8. Click **GENERATE DYNAMIC REPORT** button.

9. On the following window (tab) choose the output format and paper size and click **GENERATE** button. The report will be opened in a separate window.
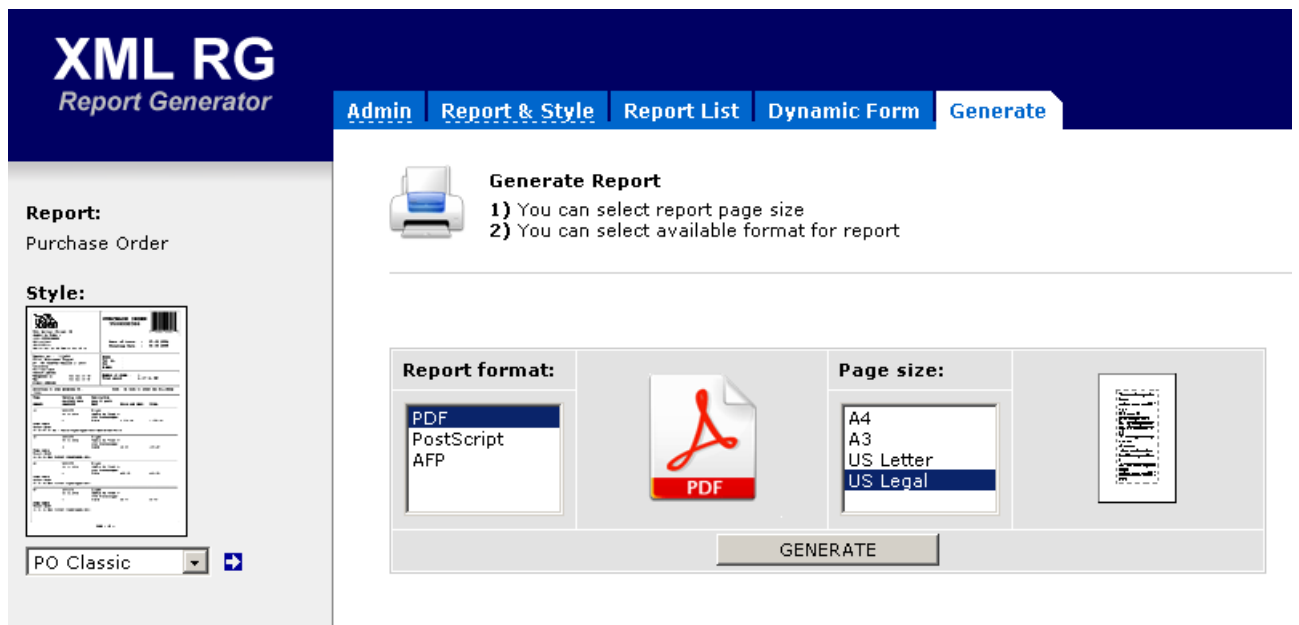
Fig. 3.2.5. Choose report format and the page size and generate the report.

3.3. Adding/Modifying Report Template into the Application

1. At any time you can export existing report by **Import-Export** link for the modifying template.

Fig. 3.3.2. Export Report screen.

2. After you create a new report by **Admin/Import-Export/Create new Report** and design a template using Microsoft Word and XEdit you should use menu **Adding/modifying** to add the report within the application.
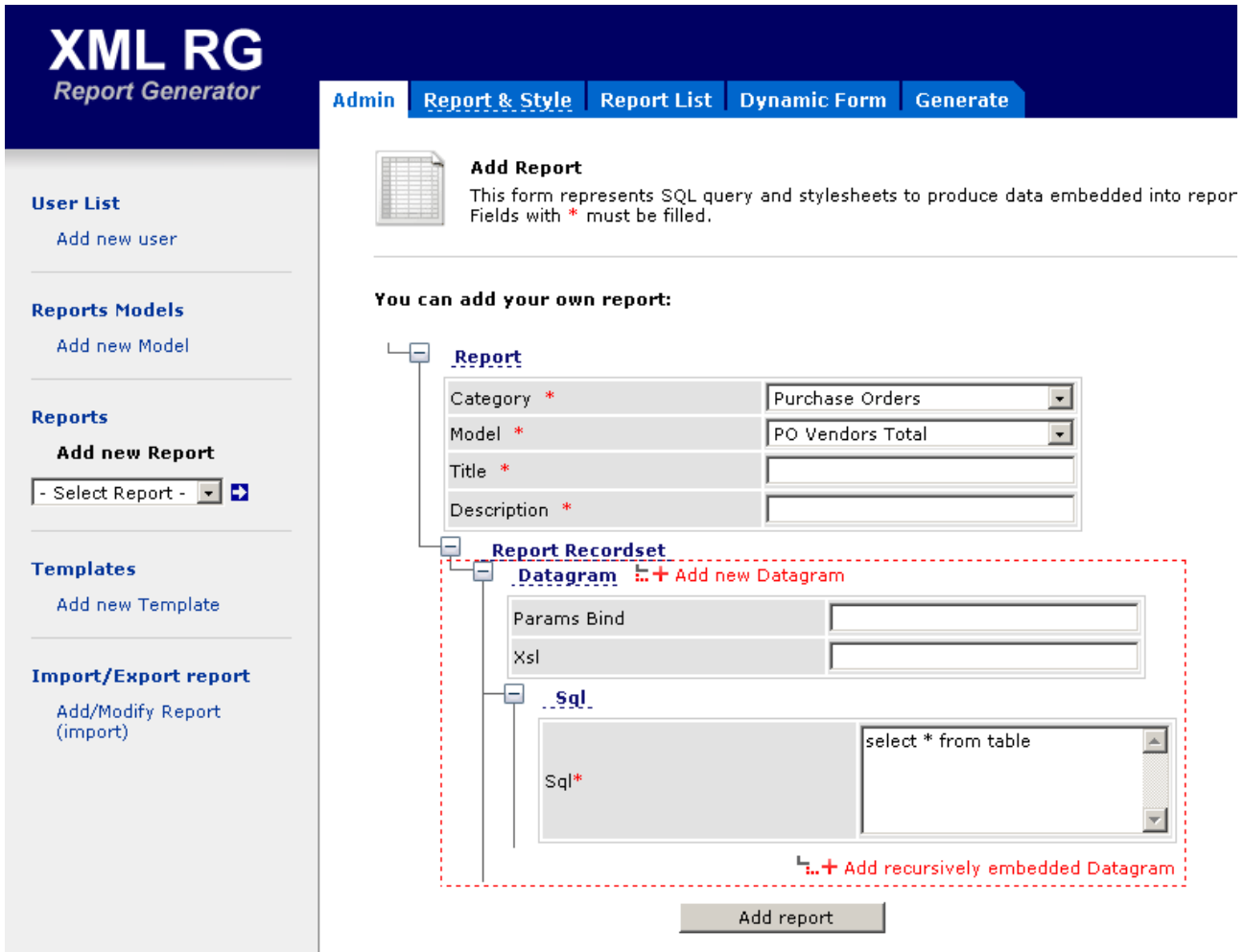
Fig. 3.3.1. A user can add new report to the application using Add/Modify Report (import) option on the left pane.

3. Select **Import-Export** link and choose an existing report from drop-down list box.

4. Then click **Edit Report** item to download the file with the template.

5. Use XEdit designer or any XML editor to modify the report.

6. Finally update changed report by **Adding/modifying report**.

3.4. User Rights Administration.

1. Menu **User List** allows to administrate the list of the application users and maps the list of the reports to a particular user.

Fig. 3.4.1. The list of users on Admin tab.

2. To add, edit or delete a user you should use appropriate links in the user list in the content pane of the application.

3. To manage access rights of the selected user to reports list use the link **User rights** and appeared form with list of currently accessed and currently available reports for this user.

Fig. 3.4.2. Assign the rights for reports to the particular user.

4. Application Panes and What They Are Intended For

4.1. Admin Tab

Admin tab is intended for adding new usersediting users access rights, adding and modifying new and existing reports and templates.

User List adding a new user.
Reports Models adding a new report mode.
Reports adding a new report.
Templates adding a new template.
Import/Export report adding or modifying reports.

4.2. Report & Style Tab

With this tab a user can select a report from the list of existing ones and choose the report template from available icons.

4.3. Report List Tab

Report List tab allows to work with existing reports or to switch to dynamic form to create report with your own data.
A user can filter out reports from the list after building a filter condition for any of the report s column, pick up the particular report to generate the composite one, or click **You can add your own data using Dynamic form** to go to **Dynamic Form** tab.

4.4. Dynamic Form Tab

Dynamic Form tab contains the form a user can populate with own data and generate a dynamic report. Fields with asterisks (*) are mandatory.
Also you can change the report style using drop-down box on the left pane.

4.5. Generate Tab

Choose the report format and page size and generate a report. The new report will be opened in the new screen.

5. How To

5.1. How to Generate a Report

1. Open Web browser.

2. Connect to http://www.pdfpower.com:1977/xmlrg/login.htm.

3. Enter Username and Password (**test/test** if you get connected for the first time).

4. On the left pane, select the report you want to generate(for example**, Purchase Order**). After that available report styles will appear.

5. Let s pick up **"PO Modern"** type. The application retrieves all available PO s from the customer s database.

6. It is possible for a user to filter out data using any field with conditions you want.

7. Now we can generate the report for the particular PO. Click the PO you want to create report for.

8. On the following tab choose the output format and paper size and click **GENERATE** button. The report will be opened in a separate window.

5.2. How to Create a New Report

1. Open Web browser.

2. Connect to http://www.pdfpower.com:1977/xmlrg/login.htm.

3. Enter Username and Password.

4. Go to **"Admin"** tab.

5. Select in menu **Import/Export report** the item **"Create new Report".** You could assign report s name, description and category in the appropriate fields.

6. Save the downloaded file with new report data as local file by clicking **"Create new report"** button.

7. Create the template for the new report by XEdit designer import of the downloaded file.

8. Upload the file exported by XEdit with the new template using **"Add/Modify Report"** menu item.

9. Set up user access rights for the new report by clicking **"User List" "User rights"** for the given user and add the new report to the list of available reports.

10. Select newly added report in the report list of **"Report & Style"** tab.

11. Then do the same operations as described in **"How to Generate a Report"** section.

5.3. How to Modify an Existing Report

1. After you create a new report by **Admin/Import-Export/Create new Report** and design a template using MS Word and XEdit should use menu **Adding/modifying** to add report within the application.

2. At any time you can export an existing report by **Import-Export** menu for modifying a template.

3. Select **Import-Export** link and choose an existing report from drop-down list box.

4. Then click **Edit Report** item for download a file with template.

5. Finally update changed report by **Adding/modifying report**.

5.4. How to Assign User Rights for a New Report

1. Menu **User List** allows administrating the list of the application users and maps the list of the reports to a particular user.

2. To add, edit or delete a user you should use appropriate links in the user list in content pane of the application.

3. To manage access rights of the selected user to the reports list use link **User rights** and appeared form with the list of currently accessed and currently available reports for this user.

6. References and Links

1. [W3C XSL Transformation 1.0 Recommendation](#) [http://www.w3.org/TR/xslt]
2. [W3C XML Path Language 1.0 Recommendation](#) [http://www.w3.org/TR/xpath]
3. [RenderX XEP On-line Reference](#) [http://www.renderx.com/reference.html]
4. [Microsoft Office Word](#) [http://office.microsoft.com/en-us/word/]
5. [Oracle XML DB Developer's Guide. 10g Release 2 (10.2)](#) [http://download-east.oracle.com/docs/cd/B19306_01/appdev.102/b14259/toc.htm]
6. [JEP   Java Math Expression Parser](#) [http://www.singularsys.com/jep/]
7. [Apache Xerces](#) [http://xerces.apache.org/]

7. Glossary

XEP	RenderX XEP [http://www.renderx.com/tools/xep.html] is an XML to PDF (XSL FO) formatter. It takes input in XML, applies an XSL transformation to build XSL Formatting Objects representation, and then formats the Formatting Objects into PDF or PostScript. XEP supports multiple raster and vector graphic formats. Among them, Scalable Vector Graphics (SVG) is an XML-based vector graphics representation, widely used in business applications and for fine typesetting.
XEdit	XEdit [http://pdfpower.com:1977/xedit_promo/] is the Microsoft Word-based template designer application.
Template	Template is a WordML- or XSL-FO (XSLFO)- based layout with smart tags for data embedding.
Data Embedding Process	Data Embedding Process allows to include user s data into a template to generate a report.
Report	Report is a template with embedded data rendered by XEP into an output format (PDF, PS, AFP, etc.)