NeXtract Professional

Product Documentation

Version: 3.009
Date: 12/5/06

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Introduction

NeXtract is a report extraction tool that allows the definition of fields in a text report and extraction of those fields into a spread sheet or database.

Features:
- Output to Excel, Lotus, dBase, FoxPro, Access, HTML, CSV, Tab delimited text, and XML
- Built in E-Mail support. Send an extract as an E-Mail attachment from within NeXtract
- Filtering and Multi-Field Sorting
- Set page breaks based on criteria, # of lines, or FormFeeds
- Calculated Fields
- Column arrangement and formatting of data within NeXtract
- Append data to databases for data accumulation
- Supports field types of: String(text),Integer, Long Integer, Currency, Date/Time, Floating Point Decimal, Memo

Features for Customers with LaserVault Universal Server:
- Login and select reports via a TCP/IP connection
- Built in Data Mining for extractions across Reports, Dates, and Archives
- Save and retrieve templates from the server

For more information on LaserVault, visit www.laservault.com.

Contents

Navigation Menu

On the left side of the application is a navigation menu that helps to operate NeXtract and have quick access to the features available. Also note that the menu is retractable at any time. It can be hidden and restored by simply clicking on the arrows directly to the right of the navigation menu.

Main Menu
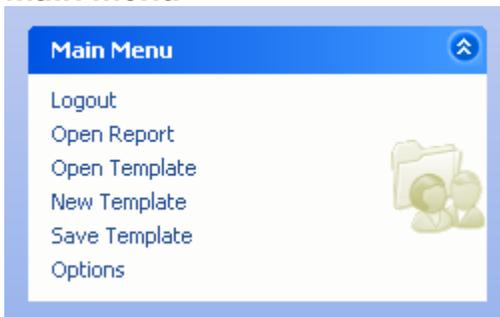
This menu will allow logging in and out of the LaserVault Reports server, as well as open a report or template. A new template can also be started or the template currently being edited can be saved and access to the NeXtract options is allowed from this menu.

Report View

Once a report has been opened, this menu will allow various actions to be performed on this report, from defining and editing fields to checking and extracting information from the report.

Navigation Menu (cont)

Data Preview

This menu allows the display of a preview of the information to be extracted.

Print Preview

This menu allows the display of a preview of the information in a table format, which can be printed. It also allows access to the print settings for this print job and submitting the print job.

Report Mining

This menu simply displays the Report Mining screen, which allows extraction of information from a range of reports while connected to a LaserVault Reports server.

Navigation Menu (cont)

Template Settings
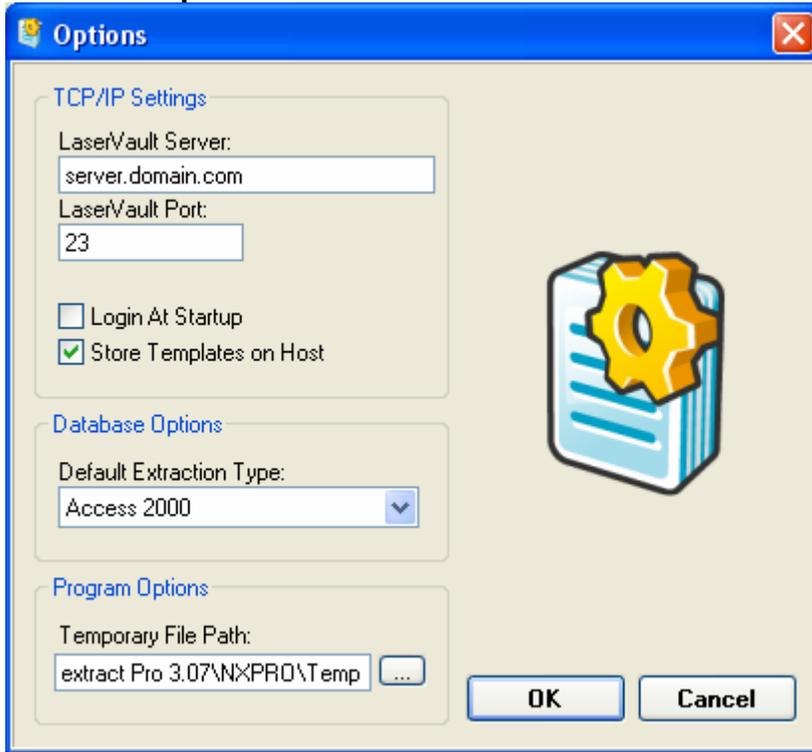

This menu allows the settings to be edited for the extraction template that is currently open.

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Getting Started

NeXtract Options

This screen allows the editing of a few settings that dictate how NeXtract will behave.

- LaserVault Server/Port
  This specifies the connection information to connect to a LaserVault Reports server. Connecting to an LVR server is not required to use NeXtract; alternatively information can be extracted from reports located on the local computer and save templates to as a local file.
- Login At Startup
  Enabling this option will display the login prompt when the program starts.
- Store Templates on Host
  This option specifies whether the saved templates will be stored on the LaserVault Reports server or to the local computer.
- Default Extraction Type
  This option simply specifies which file type will be selected by default when information is extracted from a report.
- Temporary File Path
  This option will be automatically filled in to a value of <installation path>\Temp; however, if NeXtract is being used in a multi-user environment (Citrix, Terminal Services, etc...), then it may be necessary to change this option so each user has their own temporary file path.

Getting Started (cont)

Logging into a LaserVault Reports Server

If the LaserVault Reports server connection information is specified in the NeXtract options, Login can be selected from the navigation menu to bring up the login prompt.

Opening a Report
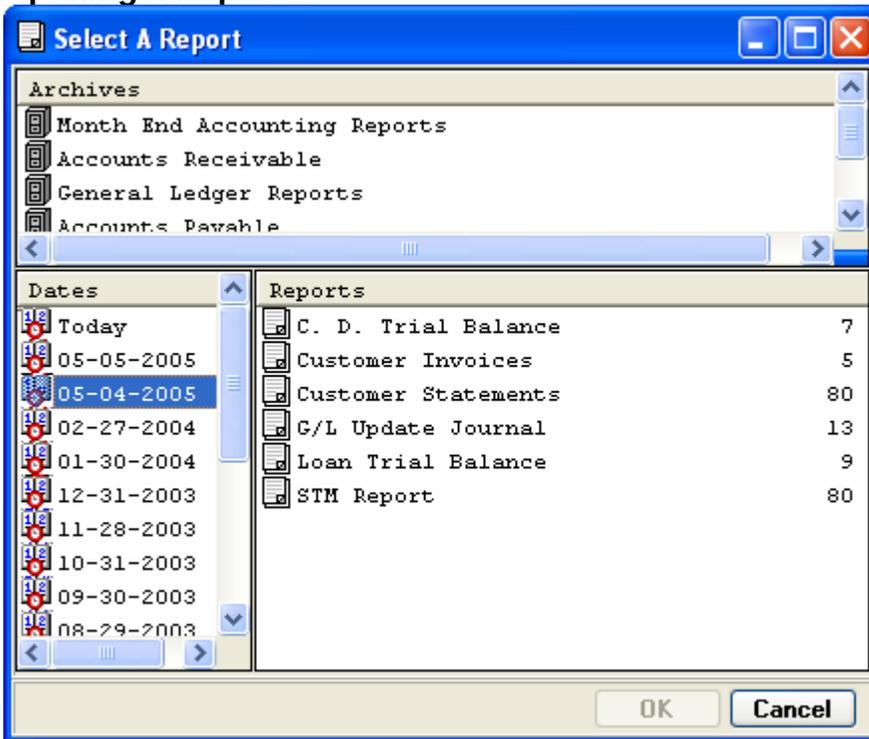
If NeXtract is currently logged into a LaserVault Reports server, the above dialogue will be visible; which allows selection of the report to work with.

If NeXtract is not logged into an LVR server, a standard File Open dialogue will appear; which allows navigation to the file to be opened on the local computer.

Getting Started (cont)

Opening a Template

If NeXtract is currently logged into a LaserVault Reports server and have a report open, the above dialogue will be visible; which allows selection of the template to work with. Notice that the templates which have an "R" on their icon indicate that read-only access is granted to that template.

If NeXtract is not logged into an LVR server, or have the "Store Templates on Host" option de-selected, a standard File Open dialogue will appear; which allows navigation to the template file to open on the local computer.

Getting Started (cont)

Defining Fields

To add a field to the template, simply highlight a value to be extracted and click on the "Define Field" option. The following menu will come up, which allows the details about the new field to be defined.

Define A Field

Field Name	Data Type	Start	Length
Field001	String ⌄	12	11

Selection Criteria

- ⦿ Look for this field on every line.
- ○ Look for this field after line: [9]
- ○ Look for this field only on line(s): [   ] (1,3,5-7 etc...)

☐ Write record when this field is found.
☐ Fill blank fields with previous record's value.

[Define Field...]

- ⦿ All literal criteria must be true for a field match
- ○ Any one of the literal criteria can be true for a field match

Get criteria from: [⌄]

Literal	Column	Using Wildcards	

[OK] [Cancel]

NeXtract will attempt to sense the correct data type, based on the content of the field that was highlighted. Remember that the Start and Length of the field may need to be adjusted to account for the longest possible value that will appear in the new field.

NeXtract offers the ability to select which line(s) to begin looking for the field, and also the criteria to use when deciding to gather the field on that particular line. Alternatively, it is possible to select criteria from a field previously defined in this template, if it meets the needs for this field.
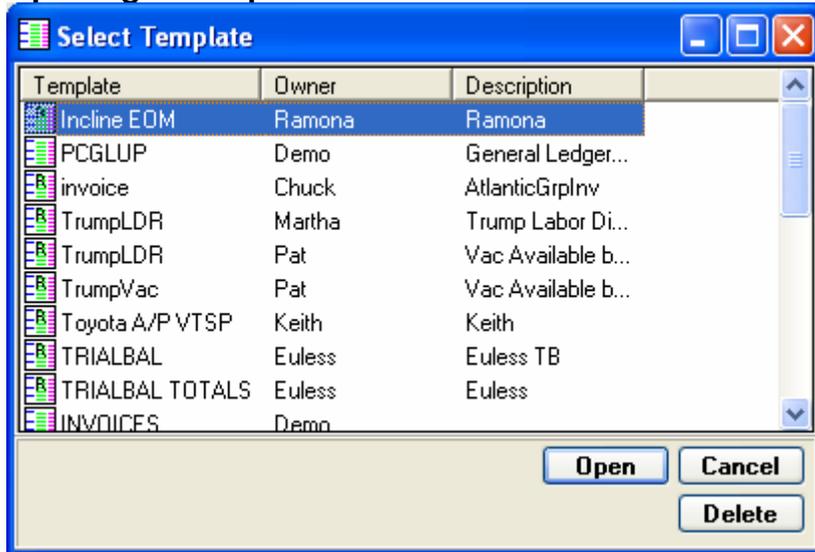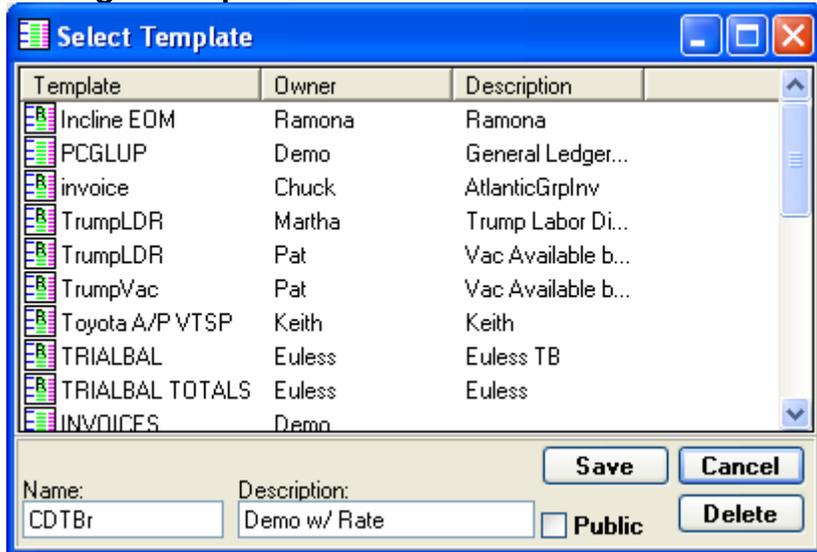
Getting Started (cont)

Saving a Template

If NeXtract is currently logged into a LaserVault Reports server, the above dialogue will be visible; which allows the naming of the template and a short description. The option is also available to make the template for public editing; this will allow all users to edit the template. Leaving this option unchecked will allow other users to use the template, but it will be marked with an "R" on their icon to indicate that they have read-only access to that template.

If NeXtract is not logged into an LVR server, or has the "Store Templates on Host" option deselected, a standard File Save dialogue will appear; which allows saving of the file to the local computer.

Contents

Report View

```
        C. D.   T R I A L   B A L A N C E

  CD        CURRENT       ORIGINAL     ACCR.              NEXT      LAS
  NBR       BALANCE       BALANCE      INT.     RATE      DATE      PAI

  8719     79,000.00                  2,827.77  .06500  01/04/88  06/0
  8742      6,000.00                    214.77  .06500  01/04/88  06/0
            85,000.00

  4893     10,000.00                    199.45  .06500  03/01/88  09/0
  5255     13,000.00                    111.26  .06375  05/03/88  11/0
  5254     13,000.00                    111.26  .06375  05/03/88  11/0
  5300     12,000.00                     88.03  .06375  05/10/88  11/1
  5950     10,000.00                    162.74  .06750  03/25/88  09/2
  5952     10,000.00                    162.74  .06750  03/25/88  09/2
            68,000.00
```

The report view shows the selected report in a textual view. From this view, fields can be defined, data verified, and extractions saved into many data formats.

Notice that the fields are highlighted as they are defined to allow for visual verification that the field is in the correct location and that the correct lines are being extracted. The highlighted fields are color coded by data type for further visual verification.

Verifying the extracted data will examine the data to ensure that the correct data type is being used. It will also check for fields that appear to have been cut off by the start position and field length definitions.

Report View (cont)

Define Fields

This screen allows the settings for an individual field to be modified.

The "Write Record" option tells NeXtract that this field should designate the end of a data line. This option allows for a single data record to stretch over multiple lines and still be recognized as one line of data.

The "Fill blank fields" option tells NeXtract that, if a blank value is encountered for this field, the previous data line's value for this field should be used. This option allows a value to carry over into multiple records, even when that value is not present on every record. For instance, if a category value is printed at the beginning of a category's data lines, that category value can carry into each data line until the next category value is encountered.

NeXtract allows for more intelligent field recognition than just line and column on the report. By defining literal value matches for a field, it is possible to isolate even the most complicated of positions.

Report View (cont)

To add a literal criteria match to a field definition, click on the "Add new literal match" button to show the following interface.

Enter a value and column number where the value will appear on the same line as the defined field in order to positively identify that the defined field will appear. Alternatively, click the Hi-Lite button to highlight the literal criteria value on the report and have the value and column filled in automatically.

Enable the "Use Wild Cards" option to tell NeXtract that one of the specified wildcard characters will be used in the literal value.

Report View (cont)

Calculated Fields
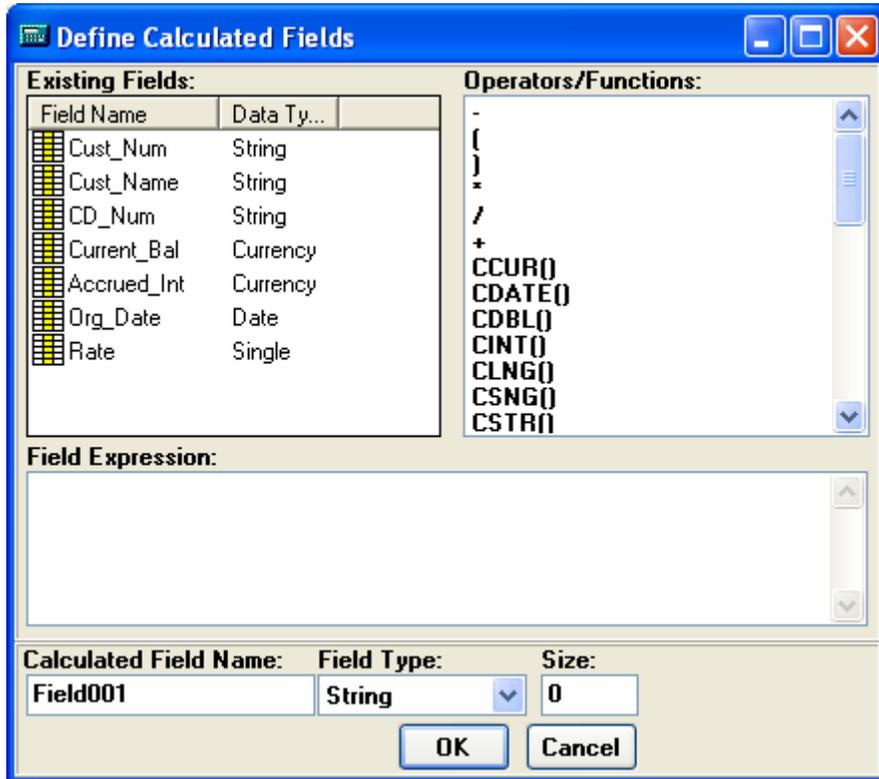
NeXtract includes the ability to define new fields that do not exist in the report from which the data is being extracted. To define a calculated field, click on the Define Field menu option without selecting any text on the report. The above dialogue will be shown that will allow the properties to be set for the new calculated field. To perform calculations on another field that is already defined, simply drag the field and the required Operators/Functions into the Field Expression entry area. This new field will not show up in the report view, but will be calculated when a Data Preview or Extract function is performed.

Report View (cont)

Edit Fields

Field Name	Data Ty...	Options	Start ...	Length
1. Cust_Num	String	(Fill Blanks)	3	6
2. Cust_Name	String	(Fill Blanks)	10	30
3. CD_Num	String		44	4
4. Current_Bal	Currency		50	11
5. Accrued_Int	Currency		74	10
6. Org_Date	Date	(Write Record)	111	8
7. Rate	Single		86	6
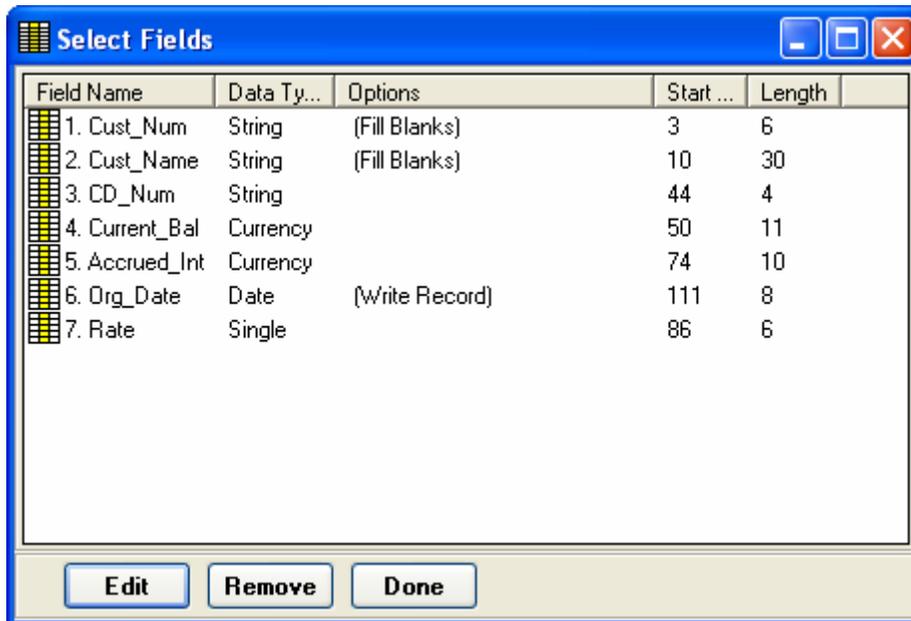
Clicking on the Edit Fields option in the navigation menu will display the above list of defined fields. From this screen, the fields can be modified or removed.

Verify
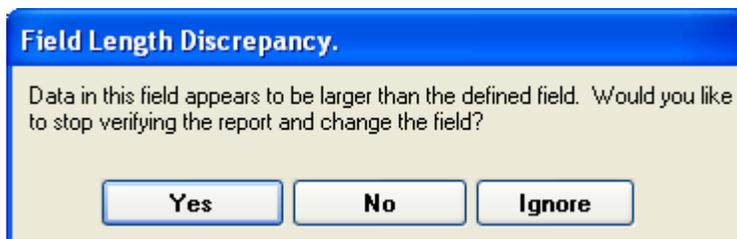
Verifying the extracted data will examine the data to ensure that the correct data type is being used. It will also check for fields that appear to have been cut off by the start position and field length definitions.

If a potential issue is recognized, a prompt similar to the above message will be displayed and allow the opportunity to make any adjustments, if required.

Report View (cont)

Extract
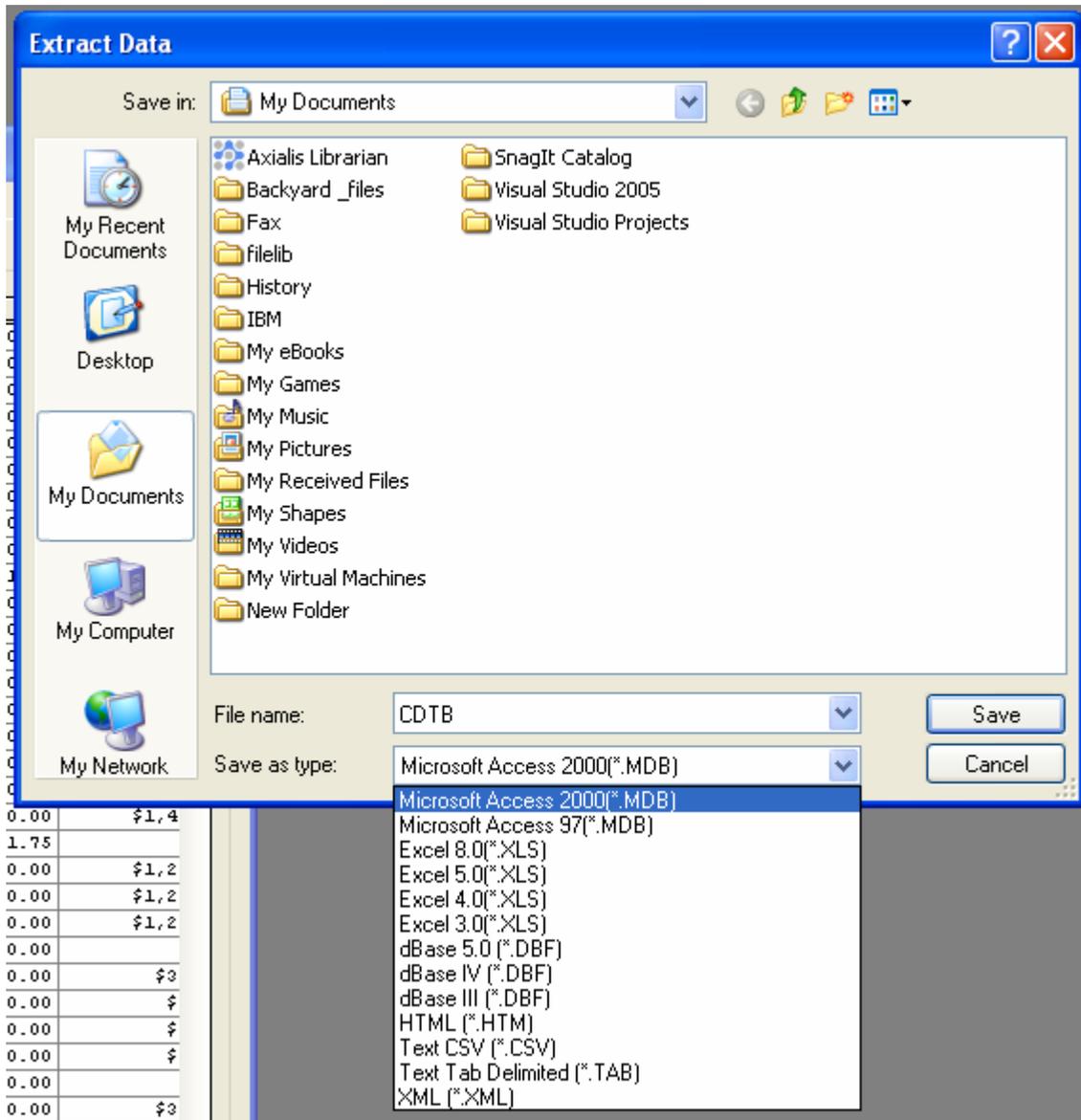
Selecting the Extract option from the navigation menu will display the following file dialogue that will allow the extraction to be saved in a variety of file formats. Select the appropriate file format, enter the desired file name and location, and click Save to perform the extraction.

Contents

Data Preview

Data Preview

	Cust_Num	Cust_Name	CD_Num	Current_Bal	Accrue
▶	100021	MR OR MRS W A SMITH	8719	$79,000.00	$2,8
	100021	MR OR MRS W A SMITH	8742	$6,000.00	$2
	100056	MR. OR MRS. EDWARD E.	4893	$10,000.00	$1
	100056	MR. OR MRS. EDWARD E.	5255	$13,000.00	$1
	100056	MR. OR MRS. EDWARD E.	5254	$13,000.00	$1
	100056	MR. OR MRS. EDWARD E.	5300	$12,000.00	$
	100056	MR. OR MRS. EDWARD E.	5950	$10,000.00	$1
	100056	MR. OR MRS. EDWARD E.	5952	$10,000.00	$1
	100064	LARA, LISA & LANA KAMP	5158	$10,000.00	$1
	100064	LARA, LISA & LANA KAMP	5191	$10,031.42	$1
	100323	FIRST BAPTIST CHURCH	8731	$8,990.18	
	100463	JASON M. WATKINS TRUST	8796	$10,000.00	$2
	100536	LYNN OR BLANCHE BEUTLE	8867	$100,000.00	$
	100676	NOLA LEE BOWMAN	5388	$10,000.00	$
	100676	NOLA LEE BOWMAN	5387	$10,000.00	
	100676	NOLA LEE BOWMAN	5386	$15,000.00	
	100838	NICOLE LYN WATKINS TRU	8794	$10,000.00	$2
	100862	CITY OF ANYWHERE	9094	$22,000.00	
	100951	NORBERT OR TERESA CHER	8526	$100,000.00	$1,4
	101060	ANTIOCH CHRISTIAN CHUR	9056	$33,741.75	
	101133	TAMARA SUE ATKINSON TR	8793	$50,000.00	$1,2
	101176	CANDACE JUNE CARLSON T	8788	$50,000.00	$1,2
	101206	SANDRA KAYE WATKINS TR	8791	$50,000.00	$1,2
	101303	HANSFORD & ALMA COUNTS	8930	$15,000.00	
	101311	CITY TREASURER	5810	$50,000.00	$3
	101311	CITY TREASURER	5938	$26,000.00	$
	101311	CITY TREASURER	5987	$150,000.00	$
	101311	CITY TREASURER	6126	$10,000.00	$
	101311	CITY TREASURER	6170	$300,000.00	
	101311	CITY TREASURER	6380	$90,000.00	$3
	101311	CITY TREASURER	6786	$10,000.00	$1
	101311	CITY TREASURER	6784	$10,000.00	$1
	101311	CITY TREASURER	7014	$10,000.00	$
	101311	CITY TREASURER	7013	$150,000.00	$2
	101311	CITY TREASURER	7221	$20,000.00	$

Font + | **Font -** | **Re-Load** | **Options**

Loading the Data Preview will extract a certain number of report pages and display the results in a grid view for quick verification of the extraction format. The number of report pages that are previewed is set in the template options, found in the navigation menu.
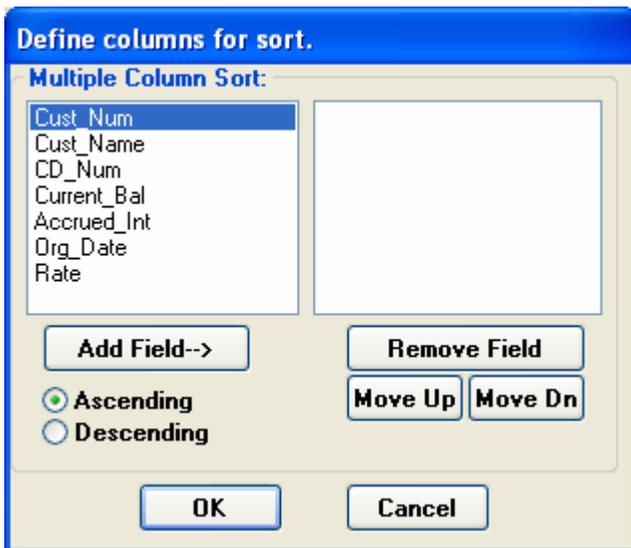
Data Preview (cont)

Data Options

Right-clicking on the preview grid or clicking the options button will display the below menu, allowing further customization of the data extraction.
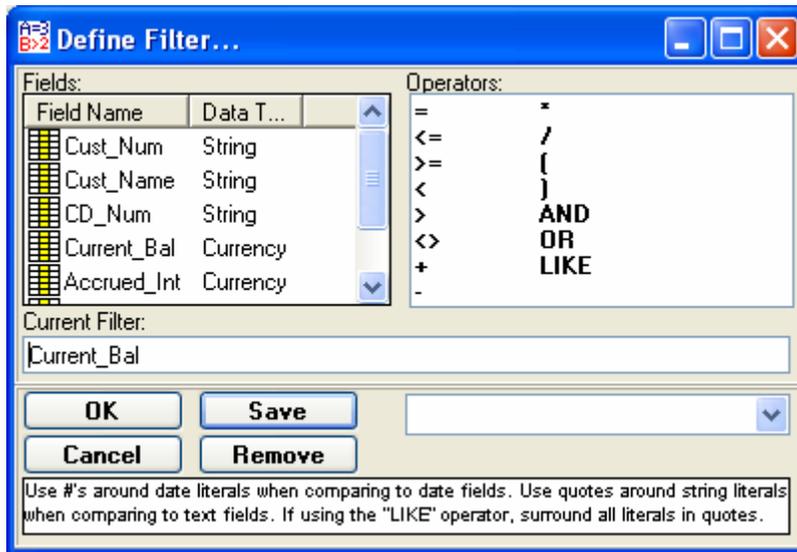

Define Sort

Clicking the Define Sort button will show the following dialogue, allowing for the data sorting options to be customized.
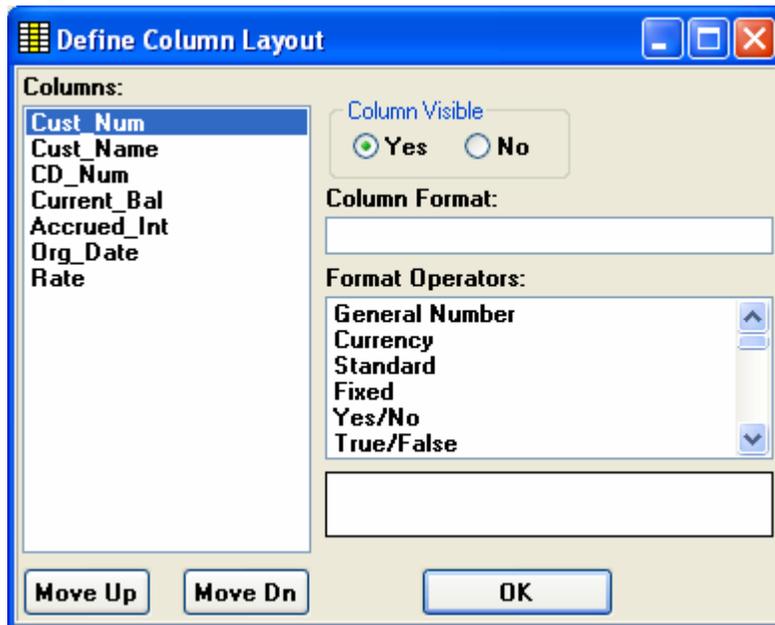
Data Preview (cont)

Define/Select Filter

In order to define a filter, drag the desired fields and operators into the Current Filter box to form a filter statement. Type any literal values into the statement. IE: Current_Bal > 500

Column Layout

The Column Layout dialogue allows the columns to be hidden, reordered, and more precisely formatted.

Data Preview (cont)

Email Extract

The Email Extract option will show a dialogue that allows the data to be extracted and emailed as an attachment.
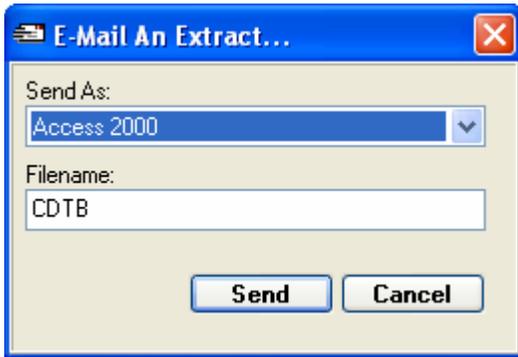
After selecting the data file format and filename, an email message will be opened in the default mail client installed on the computer. This allows for the mail client's address book to be used to select recipients and any extra notes to be entered into the message.

Contents

Print Preview

Print Preview

| Cust_Num	Cust_Name	CD_Num	Current_Bal	Accrued_Int	Rate
100021	MR OR MRS W A SMITH	8719	$79,000.00	$2,827.77	0.065
100021	MR OR MRS W A SMITH	8742	$6,000.00	$214.77	0.065
100056	MR. OR MRS. EDWARD E. PEELER	4893	$10,000.00	$199.45	0.065
100056	MR. OR MRS. EDWARD E. PEELER	5255	$13,000.00	$111.26	0.06375
100056	MR. OR MRS. EDWARD E. PEELER	5254	$13,000.00	$111.26	0.06375
100056	MR. OR MRS. EDWARD E. PEELER	5300	$12,000.00	$88.03	0.06375
100056	MR. OR MRS. EDWARD E. PEELER	5950	$10,000.00	$162.74	0.0675
100056	MR. OR MRS. EDWARD E. PEELER	5952	$10,000.00	$162.74	0.0675
100064	LARA, LISA & LANA KAMPHAUS	5158	$10,000.00	$133.08	0.0725
100064	LARA, LISA & LANA KAMPHAUS	5191	$10,031.42	$121.54	0.0725
100323	FIRST BAPTIST CHURCH	8731	$8,990.18	$0.00	0.0625
100463	JASON M. WATKINS TRUST	8796	$10,000.00	$247.53	0.065
100536	LYNN OR BLANCHE BEUTLER	8867	$100,000.00	$89.04	0.065
100676	NOLA LEE BOWMAN	5388	$10,000.00	$35.96	0.0625
100676	NOLA LEE BOWMAN	5387	$10,000.00	$0.00	0.0625
100676	NOLA LEE BOWMAN	5386	$15,000.00	$0.00	0.0625
100838	NICOLE LYN WATKINS	8794	$10,000.00	$247.53	0.065

Page Up   Page Dn   Zoom: 100%

The Print Preview screen allows the data to be printed. Take note that the printout will print the entire extraction and could potentially be quite lengthy, depending on the size of the report being extracted.

Contents

Report Mining
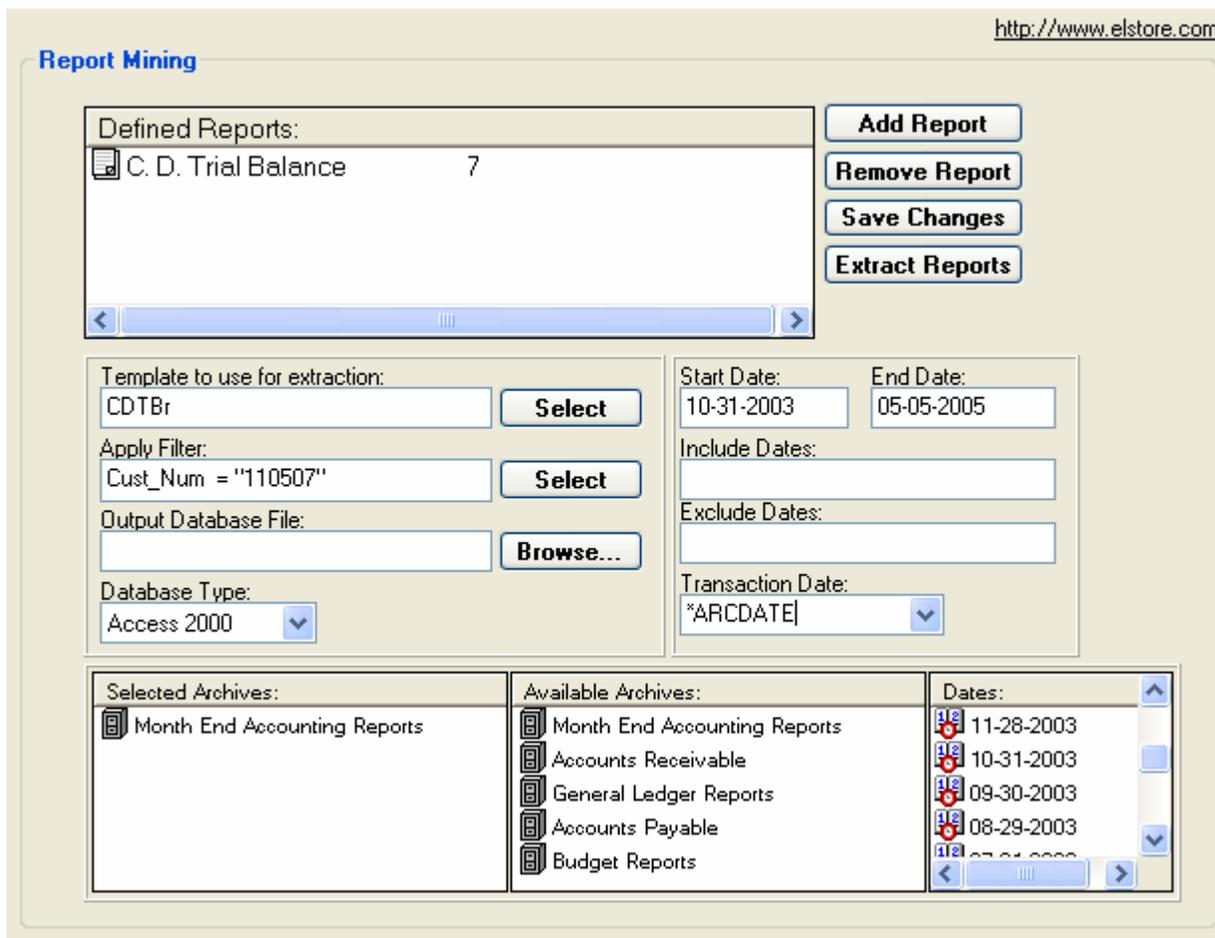
Report Mining is a term used to describe gathering data from multiple instances of a report, over a period of time. In order to use Report Mining, NeXtract must be logged into a LaserVault Reports Server to retrieve the reports.

After adding a report or selecting a previously defined report to mine, there are a few mining options to be set. Selecting a template will use that template against the selected report. By pressing the Select button next to the Apply Filter box, a filter can be used from the selected template. Next, specify the output filename and location, as well as the desired output file format.

Toward the bottom of the dialogue is a list of Available Archives; drag the desired archives over to the Selected Archives and NeXtract will search the selected archives for occurrences of the selected report. Also notice that when an available archive is selected, the Dates list is filled with the dates that contain the selected report in that archive. Drag these dates, or type them in, to the Date fields above to filter which instances of the selected report to mine.

The Transaction Date option will add another field to the extraction with either the date the report was retrieved from (*ARCDATE) or the date that the mining is performed (*PROCESSDATE).

Contents

Command Line Options

It is possible to call NeXtract with certain command line options that enable the program to load a report and/or template upon startup and even automatically complete the extraction and exit the program.

The available command line options are as follows:

> **/RPT**=″[path to a report file]″
> **/TMP**=″[path to a template file]″
> **/DB**=″[path to desired output data file]″
> **/TYPE**=″[NeXtract data file type]″
>
> > *Possible data file types:*
> > *ACCESS97*
> > *ACCESS2000*
> > *EXCEL30*
> > *EXCEL40*
> > *EXCEL50*
> > *EXCEL80*
> > *DBASE3*
> > *DBASE4*
> > *DBASE5*
> > *HTML*
> > *TEXTCSV*
> > *TEXTTAB*
> > *XML*

If a report filename is specified, the report will be opened.
If a template filename is specified, the template will be opened.
If a database output filename is specified, the extraction will occur and NeXtract will close when finished.

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