



Creating Advanced Reports using Generation Records

Applies to: Insight 5.x.x

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Summary

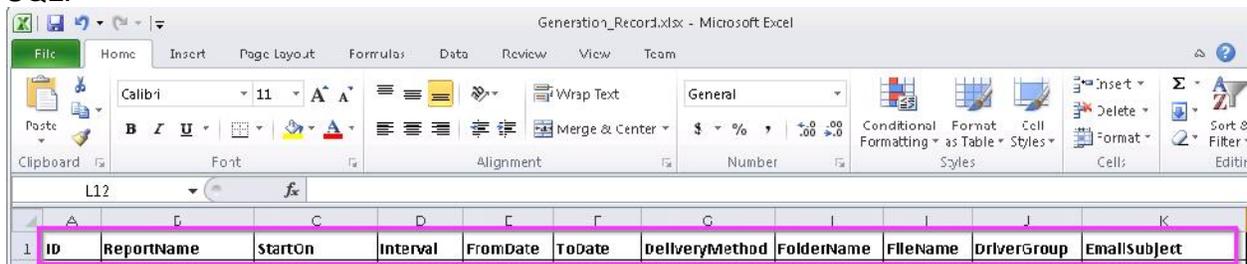
This article will step through the detailed process of creating an Advanced Report using the Generation Record method outlined in the Kofax Insight Studio Guide. It is recommended to read through the Studio Guide first and then step through this document.

Overview

An Advanced Report is created from a Generation Record, which is built upon a source file that needs to be created by the user. This document will step through creating the source file and distribution setup to enable the use of a Generation Record and ultimately setup an Advanced Report.

Step 1: Create the source document

One way to create a source file that includes the required information for a Generation Record is to use a spread sheet (In this example, Excel is being used). Another option may be to use SQL tables in a reliable database but this is really dependent on how comfortable a person is with SQL.

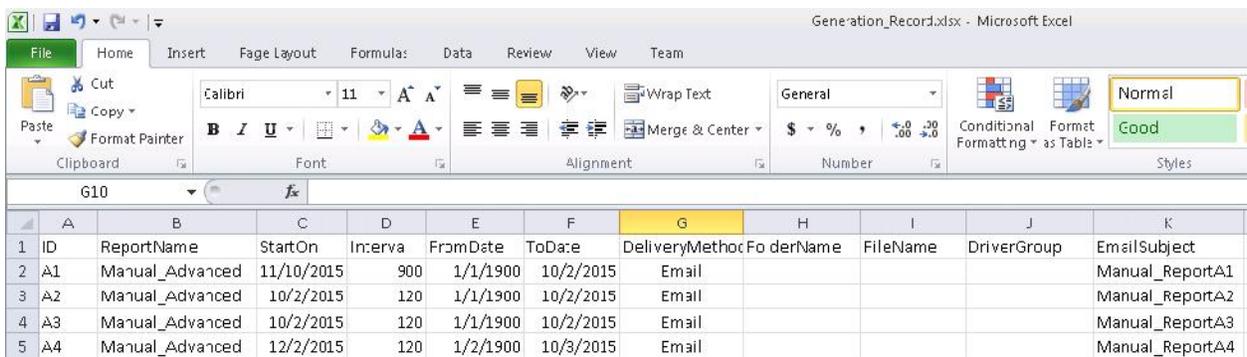


| ID | ReportName | StartOn | Interval | FromDate | ToDate | DeliveryMethod | FolderName | FileName | DriverGroup | EmailSubject |
|----|------------|---------|----------|----------|--------|----------------|------------|----------|-------------|--------------|
|----|------------|---------|----------|----------|--------|----------------|------------|----------|-------------|--------------|

The Columns listed here are the same items listed in the Kofax Insight Studio Guide.

Step 2: Fill in the necessary fields

Fill in the fields with the pertinent data needed to have a complete source document to use for the Generation Record. (Note: not all fields need to be filled to have a working record)



| ID | ReportName | StartOn | Interval | FromDate | ToDate | DeliveryMethod | FolderName | FileName | DriverGroup | EmailSubject |
|----|-----------------|------------|----------|----------|-----------|----------------|------------|----------|-------------|-----------------|
| A1 | Manual_Advanced | 11/10/2015 | 900 | 1/1/1900 | 10/2/2015 | Email | | | | Manual_ReportA1 |
| A2 | Manual_Advanced | 10/2/2015 | 120 | 1/1/1900 | 10/2/2015 | Email | | | | Manual_ReportA2 |
| A3 | Manual_Advanced | 10/2/2015 | 120 | 1/1/1900 | 10/2/2015 | Email | | | | Manual_ReportA3 |
| A4 | Manual_Advanced | 12/2/2015 | 120 | 1/2/1900 | 10/3/2015 | Email | | | | Manual_ReportA4 |

ID: Needs to be unique and will need to be used in the “Distribution Record” discussed later.

ReportName: This is the name of the report that will be used and is listed in the “Reports” of Insight Studio.

StartOn: This is required and will designate when the report will start to be generated and used.

Interval: This is how often the report will be generated (in seconds). This works in conjunction with the Insight Admin distribution section for reports (see Step 8).

FromDate: This cannot be empty but the date is not necessarily used depending on how filtering is setup for the view(s) selected.

ToDate: This cannot be empty but the date is not necessarily used depending on how filtering is setup for the view(s) selected.

DeliveryMethod: Used to determine if it will be sent to a File or Email

FolderName: This item is used if DeliveryMethod is set to “File” to determine what the folder Name will be. The location/path is set under Insight Admin.
(See “Reports saving path” in the image on Step 8).

FileName: This item is used to determine what the name of the file will be.

DriverGroup: This is used to determine what filter will be used on a particular view.

EmailSubject: As the name suggests this is the subject line of the report email and is most useful when it is descriptive of what the report is about.

NOTE: Please save the document in a folder that can be accessed by the user(s) that will create the reports.

Filtering

If filtering one or more dimensions from the source document then that dimension needs to be listed as a column in the source document as shown below, highlighted in Pink (In this example the dimension is “ProductID”).

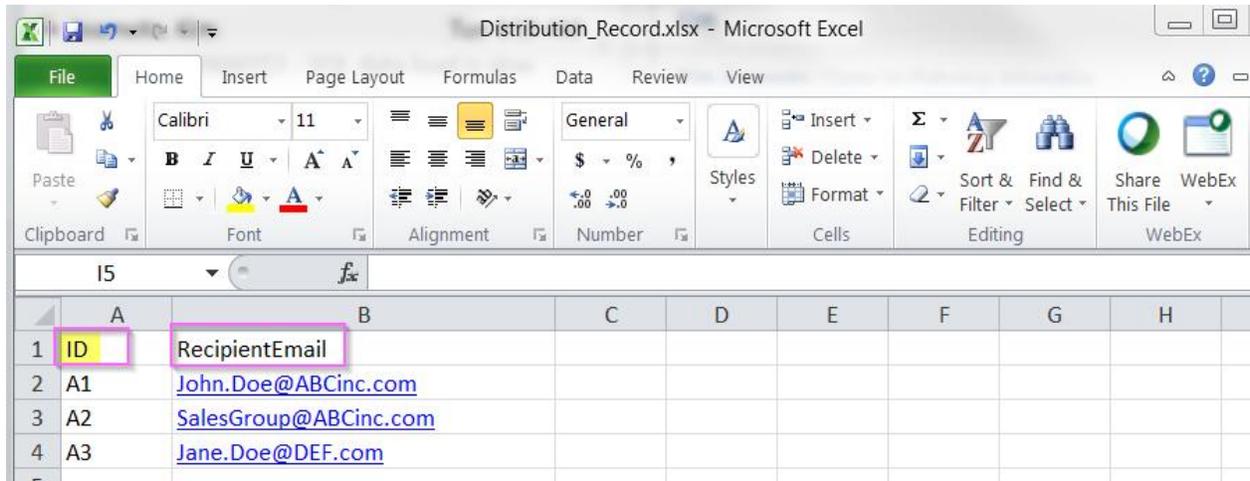
A single item filter based on “ProductID” is shown in row 5 with the blue box around it.

| ID | ReportName | StartOn | Interval | FromDate | ToDate | DeliveryMethod | FolderName | FileName | DriverGroup | EmailSubject | ProductID |
|----|------------|-----------------|-----------|----------|----------|----------------|------------|--------------|-------------|-----------------|-----------|
| 2 | A1 | Manual_Advanced | 10/1/2015 | 120 | 1/1/1900 | 10/2/2015 | Email | Randy_<Curr< | Group1 | Manual_ReportA1 | 317 |
| 3 | A1 | Manual_Advanced | 10/2/2015 | 120 | 1/1/1900 | 10/2/2015 | Email | Randy_<Curr< | Group1 | Manual_ReportA1 | 318 |
| 4 | A3 | Manual_Advanced | 10/2/2015 | 120 | 1/1/1900 | 10/2/2015 | Email | | Group1 | Manual_ReportA3 | |
| 5 | A4 | Manual_Advanced | 10/2/2015 | 120 | 1/1/1900 | 10/2/2015 | Email | | Group1 | Manual_ReportA4 | 320 |

When selecting multiple items from the same dimension, each item must be listed in its’ own row but all other information must remain the same including the ID as shown in rows 2 and 3 with the Red box around them. (Note: this feature was updated in Insight 5.4 please reference the 5.4 documentation for more information).

Step 3: Create the distribution document

Much like the source document in “Step 1” there is a need to create a distribution document that includes the email address or distribution list along with the ID that will match up against the unique ID created in the source document. This is how the desired report(s) are sent to the proper people.



In this example John Doe will receive the “A1” report while the Sales Group (a distribution list of email addresses created in the user’s email program) will receive the “A2” report etc...

Save the Distribution document (usually in the same folder as the “Source Document”)

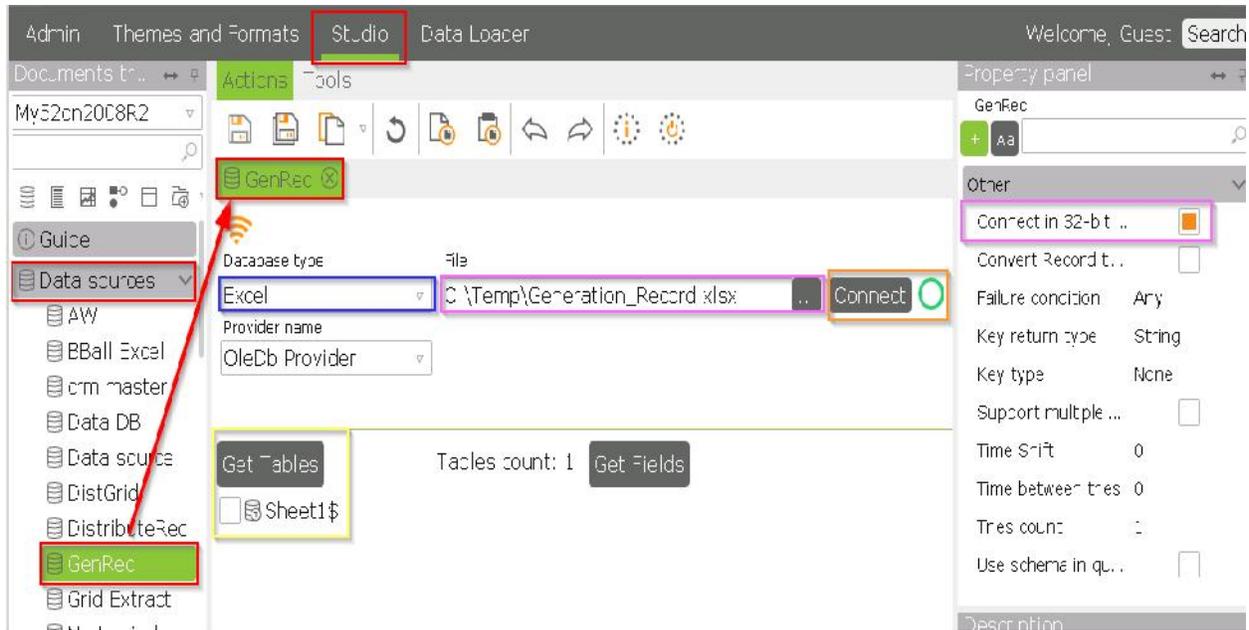
NOTE: There can be only one address in the “RecipientEmail field so if multiple people need to receive a specific report please create a distribution list in your email program in order to use that one address to send to all the intended people.

Step 4: Setup the documents as Data Sources

With the Source document and Distribution document completed we need to set them up as Data Sources so that Insight can access them.

(The KofaxInsightStudioGuide covers this process in more detail and should be referenced).

- From Studio select “Data sources” then Right click to create a new one (i.e. “GenRec”).
- Select the Db type (i.e. Excel)
- Choose the File location (If the file is based on a 32-bit provider (such as 32-bit MS Office please be sure to check that property. (See the pink box on image below)
- Click the “Connect” button and wait for the Green circle to appear next to it.
- Click “Get Tables” and select the spread sheet (i.e. “Sheet1\$”)
- Save the Data Source



****REPEAT THE ABOVE PROCESS FOR THE DISTRIBUTION DOCUMENT AS WELL****

Step 5: Create Records from the Data Sources

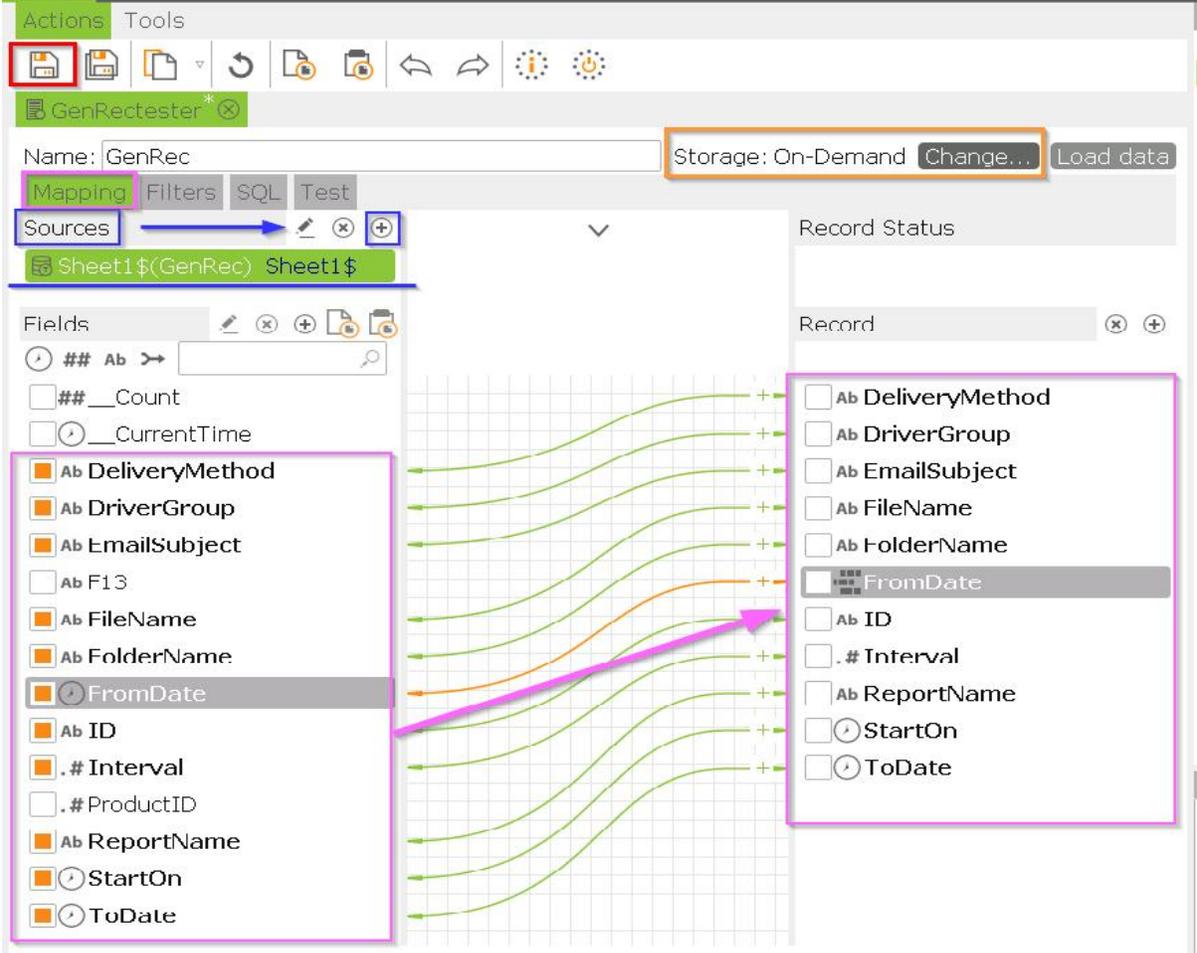
For Insight to access the data sources and provide meaningful information, the data sources need to have Records created which indicate what information to query and then show.

To setup records for our documents please do the following steps:

(The KofaxInsightStudioGuide covers this process in more detail and should be referenced).

- From Studio select “Records” then Right click to create a new one (i.e. “GenRec”).
- Click the “+” sign next to Sources to bring up the “Add Source” wizard. (see blue boxes)
- Go with the “DB table from” and select “GenRec”
- In the “Select new source” section hit the ellipsis and select “Sheet1\$” then click “OK”
- From the “Mapping” tab select the 11 items used as columns for the “GenRec” document created in “Step1” and drag them to the right side. (see Pink boxes)
- The “Time filter” pop up can be set to the “FromDate” if desired.
- Select to have the Record as “On Demand” or “Stored”. (see Orange box)
- Save the Record. (see Red box)

Note: If the Record is “Stored” please be sure to run “Load data” so the info will be available later.



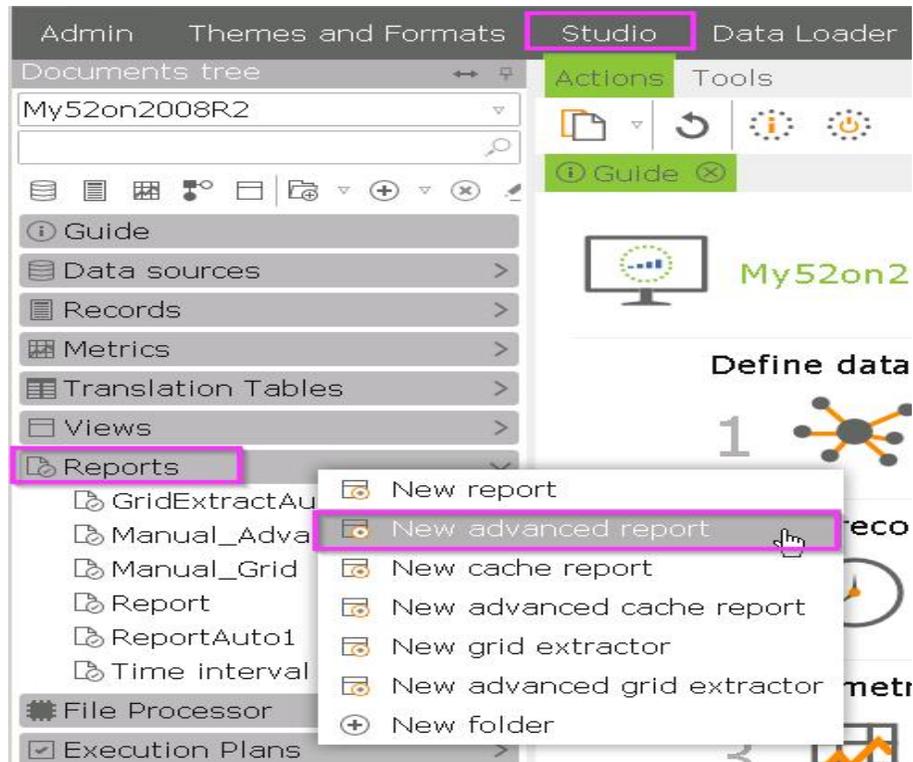
****REPEAT THE ABOVE PROCESS FOR THE DISTRIBUTION DOCUMENT AS WELL****

Step 6: Create the Advanced Report

Now that the Source document and distribution document are created and setup as Records in Insight, the next step is to create an Advanced Report.

- In the Insight Studio, Right click on “Reports” section then select “New advanced report”.

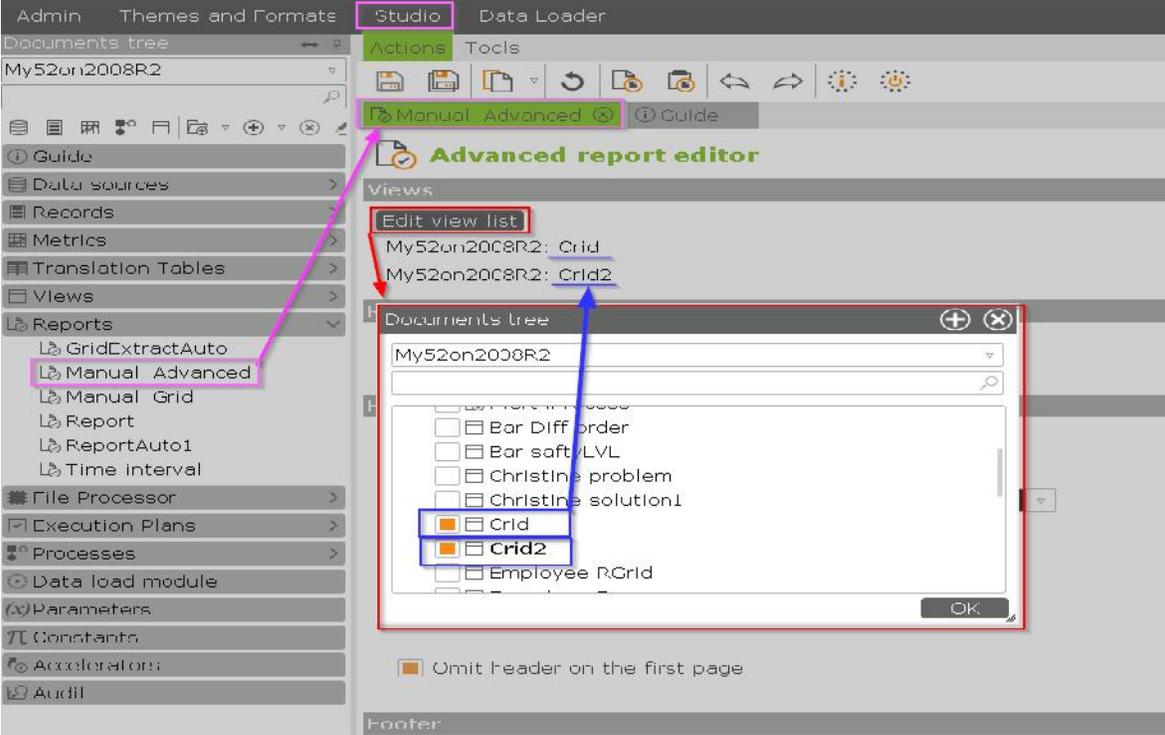
Note: It is recommended give the report a descriptive name.



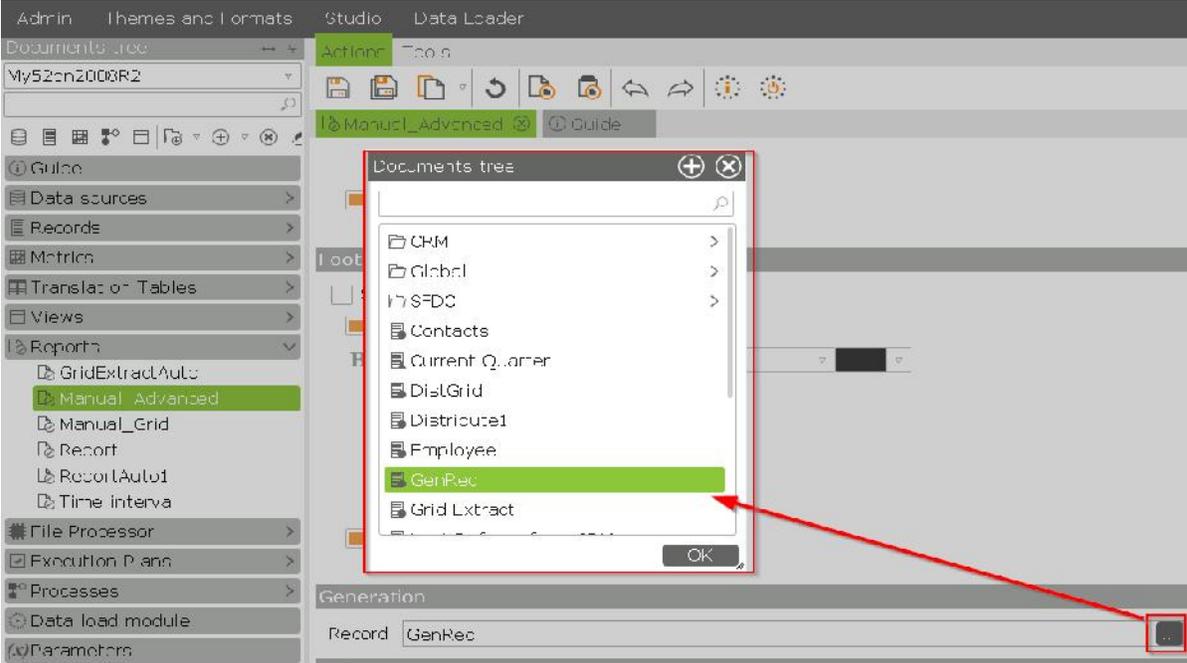
Step 7: Building the Advanced Report

In the “Advanced report editor” there are three main sections that need to be filled out in order to complete the setup:

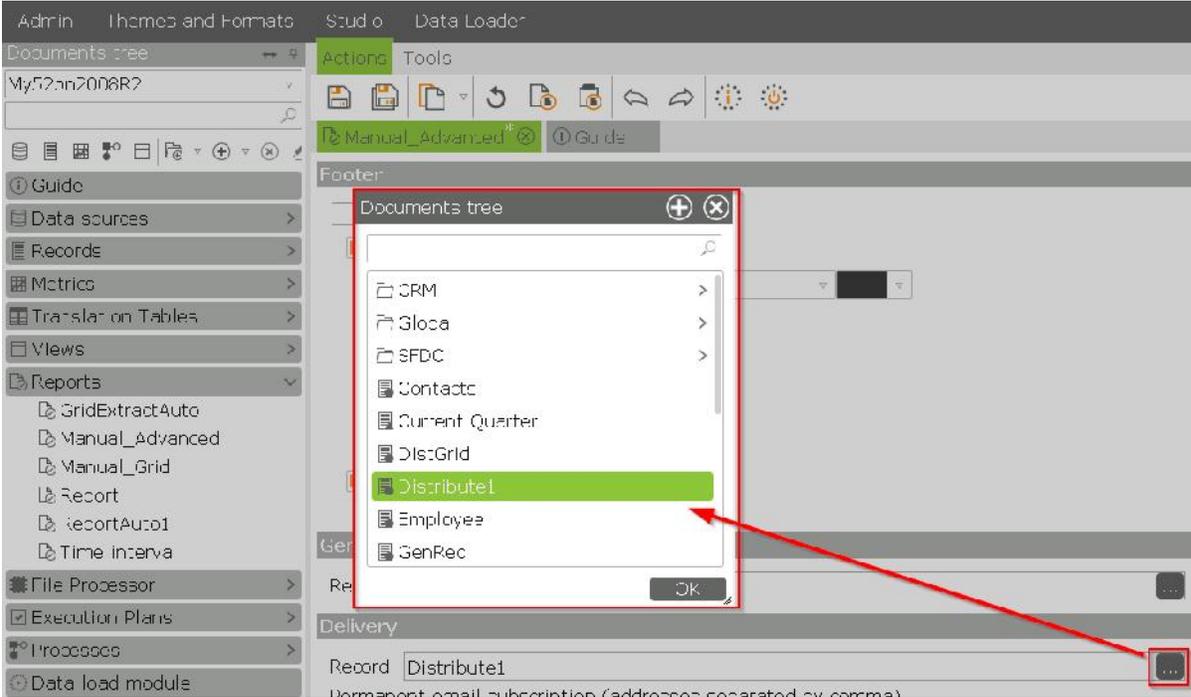
The View: this area is where the views can be selected for the report.



Generation: This is where the Record that was created in “Step 5” is selected for use.



Distribution: This is where the other Record that was created in “Step 5” is selected for use.



Step 8: Enable Reports to run

The last step in using Advanced Reports is to enable the reports to be distributed. This step allows Insight to check and see if there are any reports prepared to run by checking the “Start On’ and “Interval” fields gathered from the source document Record (i.e. GenRec).

It is recommended to set the “Reports distribution interval” to match closely to the shortest source document Interval so that Insight will check as often as that report is generated.

In the example on “Step 2” the shortest interval is 120 seconds (or 2 minutes). So on the example below, the Reports distribution interval will be set to 2 minutes. Then click the save button to activate it.

