

Kofax SafeCom Reports Administrator's Guide

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KOFAX

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Preface

This guide is intended for administrators who are using main tracking statistics, user statistics, device statistics, client billing statistics and job list.

Training


Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the [Kofax Education Portal](#) on the Kofax website.

Getting help with Kofax products

The [Kofax Knowledge Base](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base:

1. Go to the [Kofax website](#) home page and select **Support**.
2. When the Support page appears, select **Customer Support > Knowledge Base**.

 The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details, and documentation, including release news.
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.

From the Knowledge Base home page, you can:

- Access the Kofax Community (for all customers).

Click the **Community** link at the top of the page.

- Access the Kofax Customer Portal (for eligible customers).

Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Customer Portal**.

- Access the Kofax Partner Portal (for eligible partners).

Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Partner Portal**.

- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

Go to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1

Introduction

SafeCom Reports

SafeCom Reports enables viewing of main tracking statistics, user statistics, device statistics, client billing statistics and job list.

SafeCom Reports builds on Crystal Reports from Business Objects. SafeCom Reports includes a number of predefined, but parameterized reports. SafeCom can develop and supply additional reports according to specification.

This chapter describes how to install SafeCom Reports and generate a report.

Prerequisites

- SafeCom Reports is only supported when used together with SafeCom G2 version S82 070.370*01 or newer.
- Disk space: 260MB.
- TCP Port 1433 and 1116 must be open on the SQL server that hosts the SafeCom SQL databases.

i SafeCom Reports does not connect if another port than TCP 1433 is used for the SQL server instance for the primary server.

SafeCom Reports supports TLS 1.2 encryption in the communication towards G4 Server.


- The feature requires version 11 or above of the ODBC driver for SQL Server
- By default, SafeCom Reports uses the latest "ODBC Driver XX for SQL Server" driver.

To use a specific driver, create and configure the following registry setting:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\SafeCom\SafeCom Reports]  
"ODBC_Driver_for_SQL_Server"="ODBC Driver XX for SQL Server"
```

Install SafeCom Reports

Before upgrading the SafeCom Reports, uninstall the previous version. Go to Windows **Control Panel** > **Programs and Features**, right-click SafeCom Reports, and select Uninstall.

 The installation must be Run as administrator.

1. Download the software from the link supplied to you.
2. Run the installation file.
3. Click **Next** in the SafeCom Reports Setup Wizard.
4. Select the destination folder for the SafeCom Reports files.
Optionally click **Disk Cost** to check the available disk drives for required disk space.
Select **Everyone** to install SafeCom Reports so everyone who uses the computer can use it.
5. Click **Next**.
6. Click **Next** to start the installation.
A progress bar appears.
7. Click **Close** when the installation has completed.

The default installation folder is C:\Program Files\SafeCom\SafeCom Reports.

Chapter 2

Use SafeCom reports

Create a Reports user

Users with Administrator rights and Report rights are allowed to log in to SafeCom Reports. User rights are assigned in SafeCom Administrator.

1. Start **SafeCom Administrator** and log in to the server.
2. Use the `Add user` command to add a new user or use the `Find` command to find an existing user.
3. Open the **User properties** dialog and click on the **Rights** tab.

The screenshot shows the 'User properties - JS' dialog box with the 'Rights' tab selected. The 'Type of user' section has 'Administrator' selected. Under 'User rights', 'Device rights', 'Server rights', and 'Reports rights', the 'Full rights' checkbox is checked for each, with the description 'User can modify and view all features'. The 'Password' section has two empty text boxes for 'Password' and 'Confirm Password', each with a red asterisk. The 'Source ID' is 0. 'OK' and 'Cancel' buttons are at the bottom right.

4. Click **Administrator** to give the user Administrator rights and enter a **Password** of your own choice.
5. Select **Full rights** under **Reports rights**.
6. Click **OK**.

Windows authentication

If the SafeCom G4 server is using Windows authentication for the SQL database, then SafeCom Reports will also use it.

To work with Windows Authentication on the primary SQL server in a primary-secondary environment, perform the following steps on the listed components.

On the Domain controller, do the following:

1. Create a Windows security group (YourDomain\YourGroup) e.g. domain\safecom_reports.

2. Add the SafeCom report users (Windows logons) to the Windows security group.
3. Go to the SQL server that is used for the primary server to perform the following steps:
 - a. Log in to the SQL server instance with system administrator rights.
 - b. Open the provided grant permissions.sql in MS SQL Server Management Studio, and provide the name of the created group by correcting YourDomain\YourGroup in the line:

```
SET @LoginGroup=' [YourDomain\YourGroup] ' as selected in step 1.
```
 - c. Execute the grant permissions.sql script located in the `SafeCom Reports` folder.

Start SafeCom Reports

1. Click the **SafeCom Reports** icon on the desktop.
2. Enter **SafeCom Server** (hostname or IP address) or click the SafeCom Server button to broadcast for available SafeCom servers. Enter **User** (default is ADMIN), **Password** (default is nimda).

i If the user belongs to a domain the domain followed by a slash (/) or a backslash (\) must be specified before the user's logon. Example: MYDOMAIN\JS.

You can also specify the port used or select the **Use ODBC Data Source Administrator port settings** option.

3. Click **Login**. You must have Administrator rights and Reports rights to log in.
Note If the SafeCom G4 server is using Windows authentication for the SQL database then SafeCom Reports will also use this. Please refer to [Windows authentication](#) for additional details.

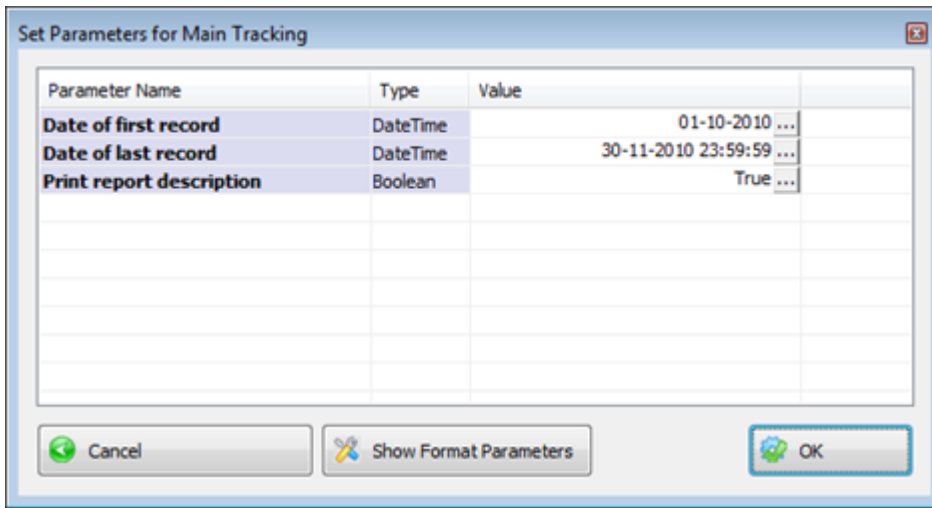
Create a report

Once you are logged into SafeCom Reports, you will be able to generate a report.

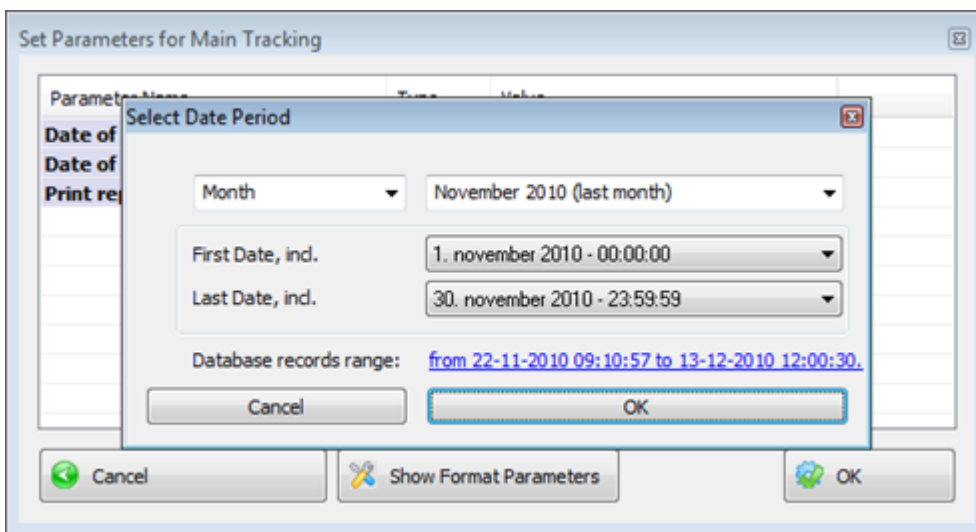
1. Select a report in the **Report** column.
2. Click **Extract New Data for Report**.

i The reports **Billing statistics** and **Billing code printing** can only be run with SafeCom G3 Server version S82 070.410*05.

3. In most reports you need to specify the following:
 - Date of first record and date of last record.
 - Change **Print report description** to **False** to remove the one-page report description that is otherwise appended to the report.
 - Click **Show Format Parameters** to control selected colors in the report.



4. Click the [...] button in **Parameter Value** to select the date.



The default period is the previous month.

For quick selection choose among these periods in the menu:

- **Year** as period and then the actual year. The current year will be listed as (incomplete) and the previous year as (last year). Example: 2020.
- **Quarter** as period and then the actual quarter. Example: Q4 2020, October. The current quarter will be listed as (incomplete) and the previous quarter as (last quarter). Quarters starts at January 1st 00:00:00, April 1st, July 1st, October 1st.
- **Month** (default) as period and then the actual month. The current month will be listed as (incomplete) and the previous month as (last month). Example: December 2020.
- **Week** as period and then the actual week. Weeks are listed by number (1-52) and the date of the Monday in the week. Example: 52, 21-dec-2020. The current week will be listed as (incomplete) and the previous week as (last week).

A week completes midnight of Sunday to Monday.

Mon, 00:00:00 <= T <= Sun, 23:59:59.

- **Day** as period and then the actual day. The current day will be listed as (incomplete) and the previous day as (last day). Example: 31-Dec-2020.

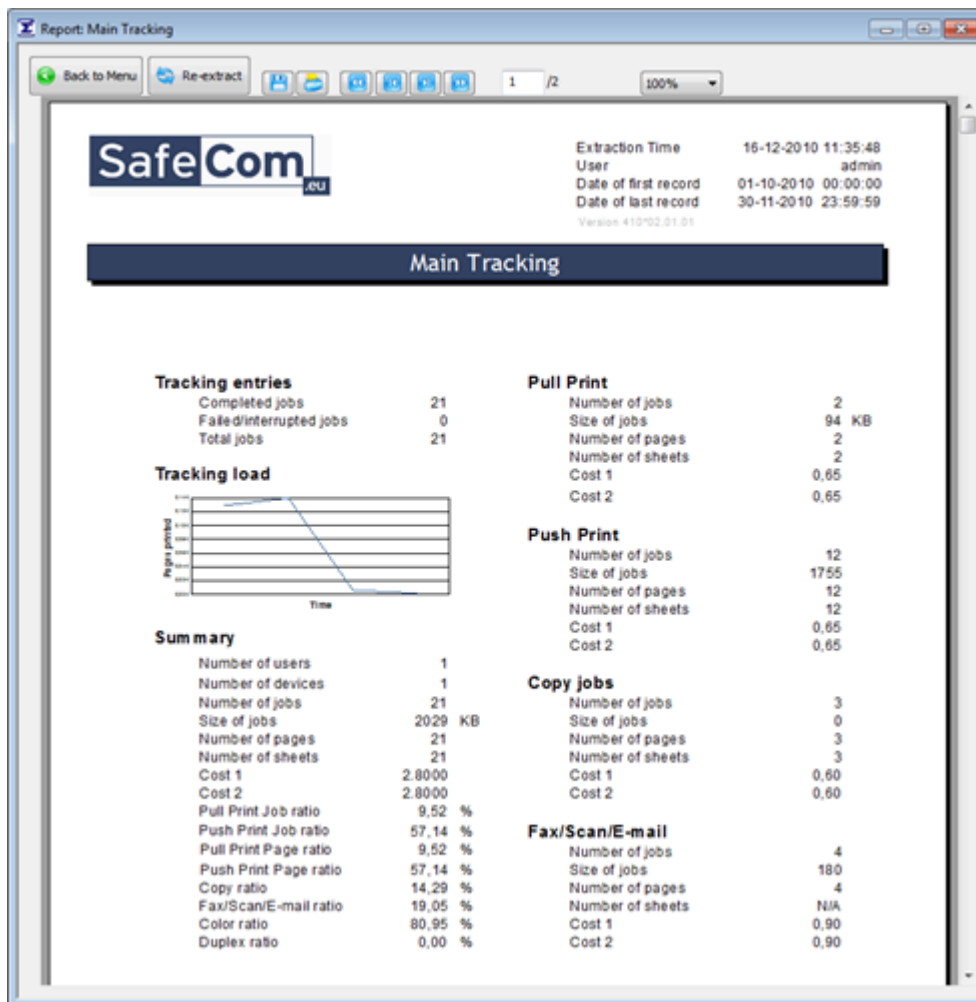
Today is any time T that falls within:

00:00:00 <= T <= 23:59:59.

You can click **First Date** or **Last Date** to select the start and end date directly from a calendar.

5. When the parameters have been specified click **OK** to generate the report. In the **Exporting Records** dialog you can monitor the progress as records are being exported.






When generating the report is finished, the report opens.



6. Click **Back to Menu** or close the Window to close the window and return to the **SafeCom Reports** menu.

7. Click **Re-extract** to change the parameters and generate the report again.

	<p>Save the report in PDF, CSV, Excel and other formats. For more information, see Supported export formats.</p>
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	Print the report.
	Go to the first page in the report.
	Go to the previous page in the report.
	Go to the next page in the report.
	Go to the last page in the report.

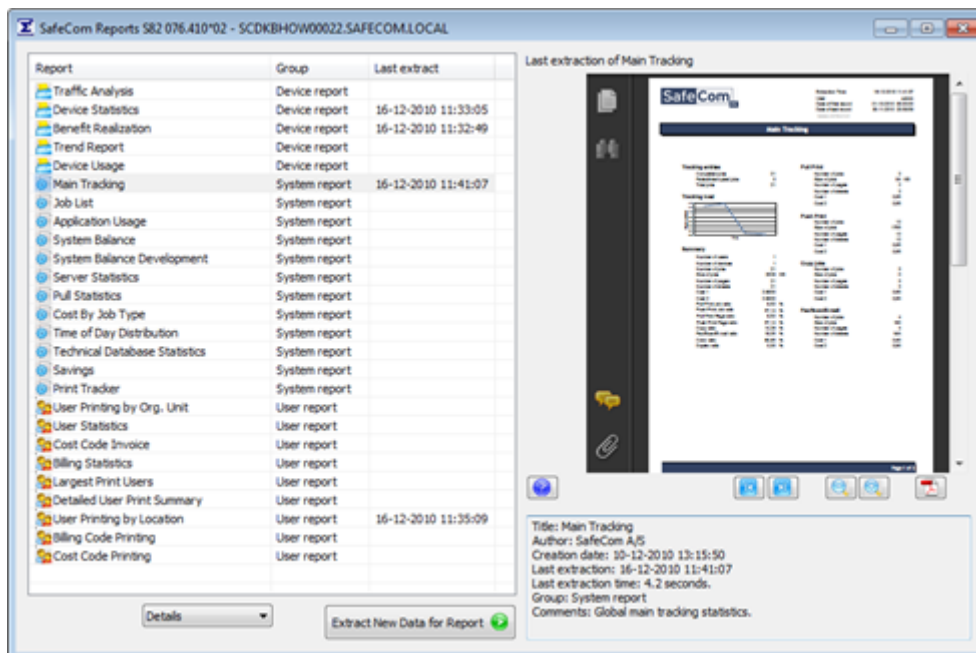
Report types

SafeCom Reports offers different reports grouped into these categories:

- Device reports
- System reports
- User reports

A description of each report is available in PDF format in the SafeCom Reports installation folder. The PDF is named the same as the corresponding report (RPT) file. For more details, see [Report file names](#). The one page description is appended at the end of all reports by default. To remove the description from reports, you must change **Print report description** to **False** when setting up the parameters for the report.

Click **View in PDF**  and in the PDF, it is possible to search on specific text within the report by clicking the search button .




Supported export formats

Reports can be saved in any these formats:

- Adobe Acrobat (PDF)
- Crystal Reports (RPT)
- HTML 4.0
- Microsoft Excel 97-2000 (XLS)
- Microsoft Excel 92-2000 – data only (XLS)
- Microsoft Word (RTF)
- Microsoft – Editable (RTF)
- ODBC
- Record Style – Columns with spaces (REC)
- Record Style – Columns without spaces (REC)
- Rich Text Format (RTF)
- Separated Values (CSV)
- Tab Separated Text (TTX)
- Text (TXT)
- XML

Add customized reports

- If you need to customize reports you should first investigate if the customization can be accomplished by changing the parameters in the report. By changing the parameters, you can for example include a different logo and also change fonts and colors. For more information, see [Report format parameters](#).
- If you have Crystal Reports from Business Objects you can copy and rename the supplied *.rpt files in the SafeCom installation folder. Subsequently you open the *.rpt file in Crystal Reports and make the desired changes. This method allows you to change layout and the content in the reports.

 In some reports the Crystal Reports generated SQL queries have been replaced with SafeCom developed SQL queries to get much faster performance. Customization of these reports and specialized SQL queries are discouraged as they can contain thousands of lines.

- When making changes you need to be aware that SafeCom reserves the rights to change the underlying SafeCom database structure at any time without further notice.
- Kofax is always ready to discuss customized development, if this is required to optimize your reports. Please contact [Kofax Support](#) to hear about possibilities.

Chapter 3

Command line interface

This chapter gives information on how to use the command line interface with your Kofax SafeCom reports.

C:\Program Files\SafeCom\SafeCom Reports\RptExport.exe

Usage on **Windows 32-bit**:

```
RptExport.exe /srv='zzzz' /usr='xxxx' /pwd='yyyyy'  
  {src="sourcereport1.rpt" dst="destfile1.pdf" type=[see export types] }  
  {src="SCR_STD_Dev_03 - Trend Report.rpt" type=pdf  
    period=week-1 arg#SYSPARM_LocaleFile=lang-dk.txt }
```

Usage on **Windows 64-bit**:

```
C:"C:\Program files (x86)\SafeCom\Safecom Reports\rptexport.exe" /  
srv='MyScServer' /usr='MyUser' /pwd='MyPassword' {src=""C:\Program files  
(x86)\SafeCom\Safecom Reports\SCR_STD_Usr_02 - Cost Code Invoice.rpt"  
exptype=pdf arg#Cost Code=cc-jae }
```

Export Types (on Windows 64-bit, use exptype):

type=pdf	Portable Document Format(*.pdf), Acrobat Reader
type=html	HTML 4.0
type=xls	Microsoft Excel Format
type=xlsdata	Microsoft Excel Format, data only
type=rtf	Rich Text Format
type=rtfedit	Rich Text Format, editable
type=txt	Plain Text Format
type=xml	XML
type=ttx	Tabulator-separated file
type=csv	Comma-separated file
type=doc	Word for Windows

Periods:

day-0	Today
day-1	Yesterday
week-1	Last week

week=12,2007	Week 12 of year 2007
month-2	Two months ago
month=03/2005	The full month of March 2005
quarter-1	Last quarter
quarter=q1,2007	First quarter of 2007
year-1	Last year

A list of source report files is available in [Report file names](#). The report is generated based on the last used parameters.

The SafeCom Reports distribution includes a number of BAT files that can be used for inspiration.

Report file names

The reports files are stored as *.rpt files in the SafeCom Reports installation folder. For a description of the reports refer to the identically named PDF file in the SafeCom Reports installation folder.

Device reports

Report name	Report file name
SCR_STD_Dev_00	Traffic Analysis.rpt
SCR_STD_Dev_01	Device Statistics.rpt
SCR_STD_Dev_02	Benefit Realization.rpt
SCR_STD_Dev_03	Trend Report.rpt
SCR_STD_Dev_04	Device Usage.rpt

System reports

Report name	Report file name
SCR_STD_Sys_00	Main Tracking.rpt
SCR_STD_Sys_01	Job List.rpt
SCR_STD_Sys_02	Application Usage.rpt
SCR_STD_Sys_03	System Balance.rpt
SCR_STD_Sys_04	System Balance Development.rpt
SCR_STD_Sys_05	Server Statistics.rpt
SCR_STD_Sys_06	Pull Statistics.rpt
SCR_STD_Sys_07	Cost By Job Type.rpt
SCR_STD_Sys_09	Time of Day Distribution.rpt
SCR_STD_Sys_10	Technical Database Statistics.rpt

Report name	Report file name
SCR_STD_Sys_11	Savings.rpt
SCR_STD_Sys_12	Print Tracker.rpt
SCR_STD_Sys_13	Performance overview.rpt

User reports

Report name	Report file name
SCR_STD_Usr_00	User Printing by Org. Unit.rpt
SCR_STD_Usr_01	User Statistics.rpt
SCR_STD_Usr_02	Cost Code Invoice.rpt
SCR_STD_Usr_03	Billing Statistics.rpt
SCR_STD_Usr_04	Largest Print Users.rpt
SCR_STD_Usr_05	Detailed User Print Summary.rpt
SCR_STD_Usr_06	User Printing By Location.rpt
SCR_STD_Usr_08	Billing Code Printing.rpt
SCR_STD_Usr_10	Cost Code Printing.rpt
SCR_STD_Usr_11	Top Print.rpt
SCR_STD_Usr_12	Total Print Volume.rpt

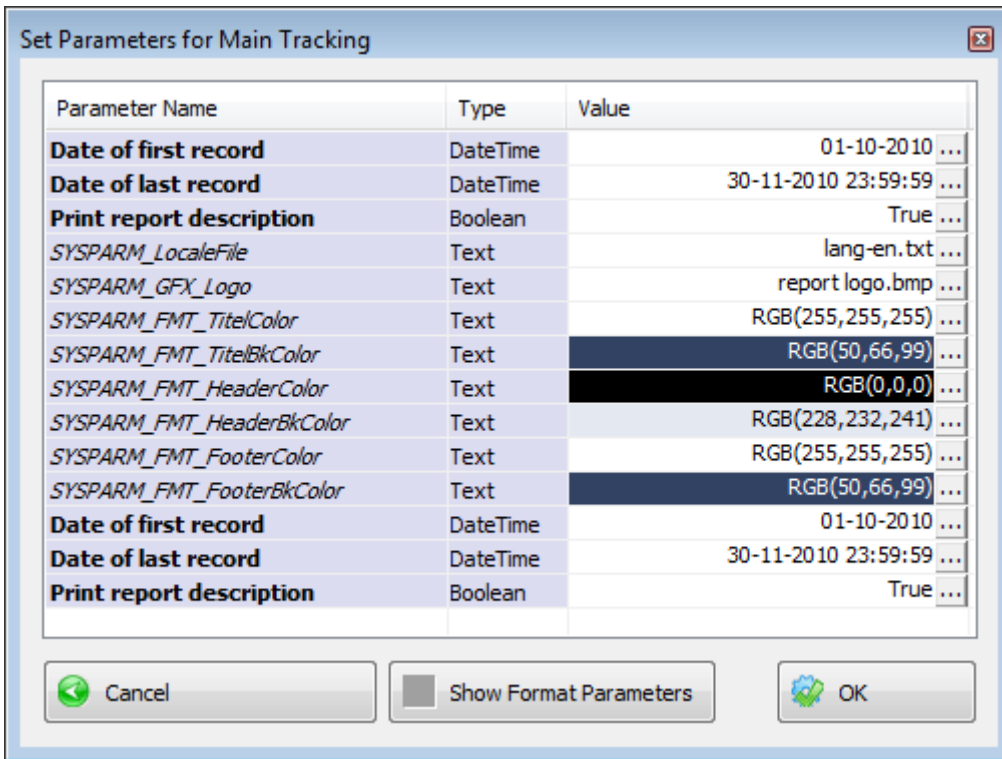
Job type

For most reports, you can specify the job type.

The job type can be one of the following options:

- All
- Paper (default)
- Paperless
- Pull/Push print
- Pull print
- Push print
- Copy
- Scan
- Fax
- E-mail
- Deleted
- System-deleted
- User-deleted
- RBP-deleted

Report format parameters



Parameter	Description
Date of first record	[DateTime] DateTime T, from and including T, of the first record to retrieve data from. See remarks.
Date of last record	[DateTime] DateTime T, up to and including T, of the last record to include in the report.
SYSPARM_TITLE	Title of Report.
SYSPARM_LocaleFile	[FilePath String] Translation file path. This file can be opened with Excel and edited on the 2nd column for text lookups.
SYSPARM_GFX_Logo	[FilePath String] Path of Logotype graphics file. BMP and JPG are supported.
SYSPARM_FMT_TitelColor	Color of text displaying the reports title. [RGB String], see remarks.
SYSPARM_FMT_TitelBkColor	Background color in title bar.
SYSPARM_FMT_HeaderColor	Color of text showing in column headers
SYSPARM_FMT_HeaderBkColor	Background color of column headers
SYSPARM_FMT_FooterColor	Text of color in footer text

Parameter	Description
SYSPARM_FMT_FooterBkColor	Background color in report's footer bar.

Device report parameters

All device reports support the following parameters:

- Date of first record
- Date of last record
- Print report description

Report	Additional parameters
Traffic Analysis	Job Type
Device Statistics	Job Type
Benefit Realization	-
Trend Report	Job Type
Device Usage	Show Top 5 Jobs for each device Show Top 5 Busy days for each device Job Type

System report parameters

All system reports support these parameters:

- Date of first record
- Date of last record
- Print report description

Report	Additional parameters
Main Tracking	-
Job List	Job Type
Application Usage	-
System Balance	Balance Calculation Date
System Balance Development	Day step Month step
Server Statistics	Histogram Frequency
Pull Statistics	-
Cost By Job Type	-
Time of Day Distribution	-

Report	Additional parameters
Technical Database Statistics	-
Savings	Charging Scheme
Print Tracker	-

User report parameters

All user reports support these parameters:

- Date of first record
- Date of last record
- Print report description

Report	Additional parameters
User Printing by Org. Unit	Job Type
User Statistics	Job Type
Cost Code Invoice	Cost Code (25 parameters in total)
Billing Statistics	Job Type
Largest Print Users	Top N, N =
Detailed User Print Summary	User Logon Job Type
User Printing by Location	Show Users Job Type
Billing Code Printing	Show Users Billing Code Job Type
Cost Code Printing	Cost Code reference Show records w/o Cost Code Only Specific Cost Code Job Type Show records w/o Cost Code