Objective

REPORT PUBLISHER FOR STAKEHOLDER ENGAGEMENT

USER GUIDE

Produce formatted Stakeholder Engagement reports
created in Objective Keystone

Objective KEYSTONE

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Background

Objective Keystone Stakeholder Engagement provides a report mechanism to extract consultation event data in a tabular format. Report results can be extracted to Microsoft Excel, via the Comma Separated Values (CSV) file type. Reports can also be formatted as a PDF output via the **Report Publisher**.

This guide outlines the **Report Publisher** and how it can be used to produce a report in the PDF format.

PREREQUISITES

This guide assumes you are familiar with the following.

- The Keystone Stakeholder Engagement application.
- Have created stakeholder engagement consultation events and forms.
- Are familiar with preparing and running stakeholder engagement reports.

If you do not have any experience with these activities, please review the *Keystone Stakeholder Engagement Guides*, contact your internal Objective Keystone team, or contact your Objective account representative.

Accessing the Report Publisher

The **Report Publisher** is available once a normal engagement report has been run. Refer to the *Keystone Stakeholder Engagement Guides* to learn more about running engagement reports.
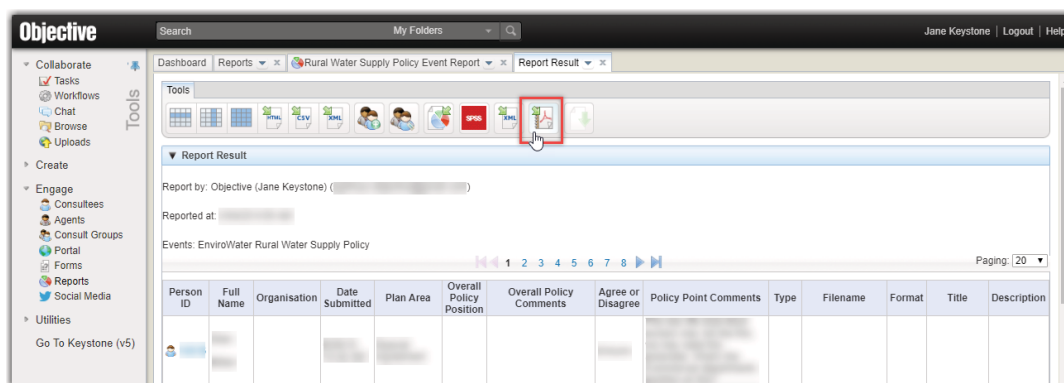
Start the Report Publisher

Run / execute the required report and from the **Report Results** tab:

1. Select **Report Publisher** ⎙ from the **Tools** tab to open the **PDF Report** tab and the **Report Publisher** interface.
2. Use the available formatting options to set.
   - **Report Options**: Such as the report title and date.
   - **Report Layout**: Report page orientation and margins.
   - **Report Colours**: For headings and table elements.
   - **Report Font**: Size and font family for the report text.

The following pages of this guide provide a detailed summary of each of these Report Publisher capabilities.

Report Publisher Settings

This section of the guide outlines each of the **Report Publisher** settings, the available options and, where appropriate, some examples of how these settings affect the final PDF Report.

Tip:

Many of the **Report Publisher** settings include an information icon ⓘ that, when selected, provides additional information on that setting.
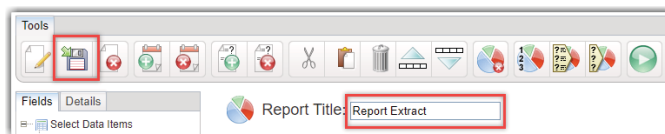

REPORT OPTIONS

The following settings are provided as **Report Options**:

Report Title

Used as the PDF report file name. The **Report Title** is also published to the PDF, unless:

- ▪ The report already has a title and is saved then that title will appear in the published PDF, or

- ▪ If the report or **Report Publisher > Options** is not completed, then no title is published, and the PDF report will be saved with the default name of 'PDFReport.pdf'.
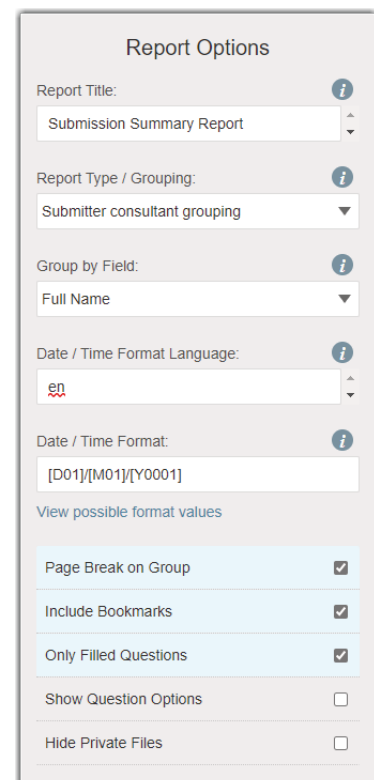
Report Type / Grouping

Provides options to group submissions / comments in the report. Options include:

- ▪ **Ungrouped**: No grouping will be used, and the results will appear in the report extract order.
- ▪ **Submitter consultant grouping**: Will group all submissions / comments by the stakeholder that submitted them.
- ▪ **Submitter agent grouping**: Will group all submission / comments by the agent (group) they are submitted under.
- ▪ **Custom grouping**: Will use the value specified in the **Group by Field** below to collate submissions / comments.
- ▪ **Consultation point grouping**: If the report is for a document consultation, then submissions / comments will be grouped by the document consultation points.

Group by / Field

Requires the **Report Type / Grouping** field to be set to **Custom grouping** otherwise this setting is ignored.

Provides the option to specify any field in the event form to be used as a grouping value. Select a form question from the drop-down list.

Date / Time Format Language

This setting affects the spelling of days and months and numbers expressed as words or as ordinals (twenty, 20th, twentieth). Language codes conform to International Organization for Standardization (ISO) Code **ISO 3166-1** for the representation of names of countries and their subdivisions - Part 1: Country codes ISO 3166-1:1997. For Example:

- input date **2020-09-25T14:59:28.367** language set to **en** and date format picture set to **[D1o] [MNn] [Y0001]** output is **25th September 2020**.
- input date **2020-09-25T14:59:28.367** language set to **fr** and date format picture set to **[D1o] [MNn] [Y0001]** output is **25e Septembre 2020.**

Date / Time Format

Formats any date fields of the 'DATE' format found in the form. For example.

- Input date **2020-09-25T14:59:28.367**
- Format applied to the **Date / Time Format** setting **[D01]/[M01]/[Y0001] [H01]:[m01]:[s01]**
- output is **20/09/2017 14:59:28**.

Notes:

- Only fields of the type 'DATE' are affected. Any dates typed into comments or text fields will not be affected.
- For additional information on using date formats see https://www.w3.org/TR/xslt20/#date-picture-string.

Page Break on Group

This is a checkbox setting and when selected will create a page break for each group as specified by the **Report Type / Grouping** setting.

Include Bookmarks

Will PDF bookmarks be included in the report? Bookmarks are applied based on the **Report Type / Grouping** setting.

Only Filled Questions

When selected only questions that have a response will be included in the report.

Show Question Options

If selected all available options and the one selected as a response, will appear in the report. Deselect to show just the response option selected.

Hide Private Files

When selected, and the report includes attachments, if the attachments are marked as 'Private' (default), they will not be included in the report.

REPORT LAYOUT

The following options are available for the **Report Layout**:

Consultation document base URL

Base URL for consultation points links, for example, **https://ocl.objective.com**.

Representation files base URL

Comments with file attachments, when included in a report, will contain a link to the file as it is stored in Keystone. To ensure the link points to the correct location, set this field to the base URL for example, **https://ocl.objective.com**. If not provided, the file path for consultation document attachments becomes relative to current document.

IMPORTANT:

If the KSE portal is in use this field must be set to the URL of the new portal home page excluding any 'sub-pages'. For example, if the KSE portal home page is **https://consult-education.objective.com/kse** then set this field as **https://consult-education.objective.com**.

Page Orientation

Select from a **Portrait** or **Landscape** layout for the report.

Table Heading Layout

Form question labels act as headings in the report table. Headings can be placed at the top of columns or at the side.

- Top headings there is one column per field (or combined field) and a single row per result record. Top headings are better for short headings with data that will fit easily into columns across a portrait or landscape A4 page.
- Side headings are placed in the first column and the content is in the second column. There is one row per field. Side headings are better for questionnaires with long questions.

Page Margin: Top, Bottom, Left, and Right

Measured in millimeters, these fields set the page margin for the report.

Column Widths

Sets the column widths for the table. Measured in millimeters and separated by a comma (,) for each column that requires a specific measurement.

Tips:

- The column size does not have to be set for every column. For example, if the table layout only needs the first two columns to have a set size the remaining columns in the report will evenly distribute to the content over the rest of the page.
- If the report only contains two columns, for example a report with the **Table Heading Layout** set as **Side Headings**, only the first column needs a value. The second will use the remaining page space.
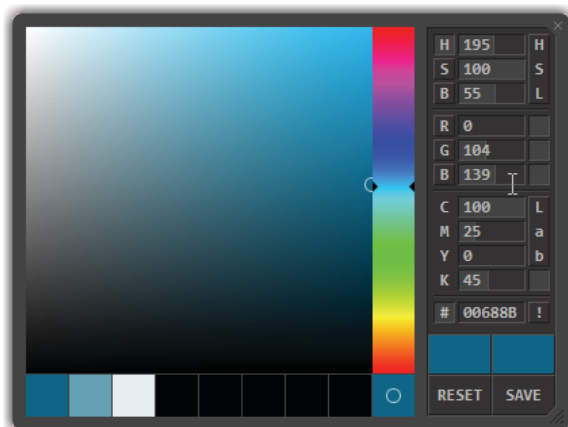

REPORT COLOURS

The following options are available for the **Report Colours**:

Note:

All colour settings have the following options:

- **Named colours:** Named web colours; yellow, orange, red.
- **Hex colours:** Hexadecimal value for a colour such as #DAA520.
- **RGB colours:** Red, Green, Blue values, for example, rgb(0,124,190).
- **RGB-ICC:** Set Red, Green, Blue and Cyan, Magenta, Yellow and Black, such as rgb-icc(0, 30, 65, #CMYK, 100%, 75%, 12%, 67%).
- Colours can also be set by selecting a colour swatch to open the colour picker.

Group Heading Colour

For report with the **Report Type / Grouping** set, the group heading will be in the colour specified.

Separator Row Colour

For reports that have the **Table Heading Layout** set to **Side Headings**. This colour will be applied between each comment in the report.

Table Heading Row Text Colour

Set the colour of the table heading text.

Table Heading Row Background Colour

Set the background colour of the table heading text.

Table Alternate Row Colour

Set the colour for alternate rows.

Table Alternate Column Colour

For reports that have the **Table Heading Layout** set to **Top Headings**. This colour will be applied to each alternate column in the report.

REPORT FONT

The following options are available for the **Report Font**:

Base Font Family

Select an available font from the drop-down to specify the overall font family for the report. This sets the font for all text elements including table headings, group headings and the report title.

Base Font Size

Sets the font size, in points, for all report content excluding the report title and group headings.
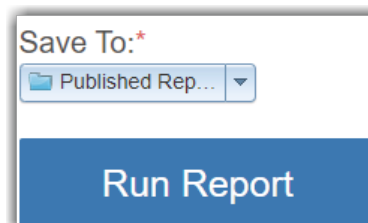
Document Title Font Size

Provide a value for the report title, in points.

Group Title Font Size

Sets the font size, in points, for any group titles appearing in the report.

SAVE AND PUBLISH REPORT

The **Save To** setting defines where the final PDF report will appear once the publishing has completed. This value must be set for the report to run. If the report is run without this value being set, the following message will appear:

There are errors in the form. Please review the following fields and try again: **Save To**

Run Report

When all settings are applied and a **Save To** location has been set, select **Run Report**. The report will publish with the setting specified and be saved to the location set under the **Save To** setting. The following message will appear when the publishing process has started successfully:

The submission was successful. The report is currently being generated and may take some time. Once it is complete you may retrieve it from the following link: **Published Reports**

The link in the message will open the location specified in the **Save To** setting where the report can be downloaded and opened:
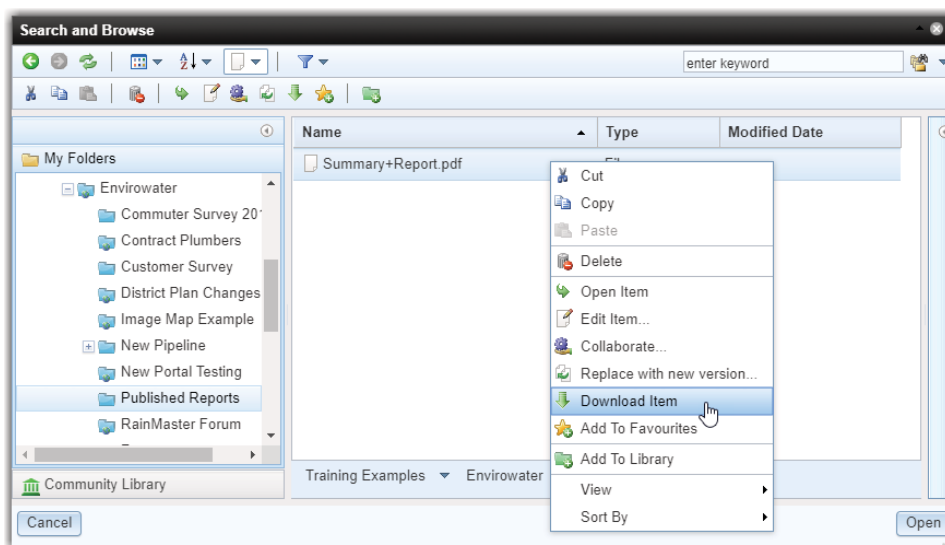
Note:

When opening the **Set To** location for the report you may notice a temporary file appear with the report name appended with '**-processing.txt**'. This is a temporary file that will be deleted automatically. DO NOT try to delete this temporary file as it is required by the publishing process and it's removal may result in error.