



## Extracting data from reports into Excel (Data Mining and Analysis)

- **What is involved in mining report data for Excel?**
- **Why export reports into Excel?**
- **How do we export reports into Excel or CSV?**
- **What are the benefits?**



End User Friendly  
Intuitive Interface



Immediately enhance  
your workflow

SpooliT automatically converts and outputs spool files to:





http://www.asymex.com

# SpooliT® Enterprise

Intelligence in document management



## Perfect Reporting

- Everytime
- Automatically
- Any format
- Any file type



## What is involved in mining report data for Excel?

- The ability to drag a mouse over areas of a report 'canvas' to select data
- Easy to use rules wizards - enabling simple rules creation
- Creating an 'Excel template'. (A filter over a report used to mine data for Excel).
- A simple to use 'Automation Wizard' to enable 'Excel templates' to be used for eMail + Export

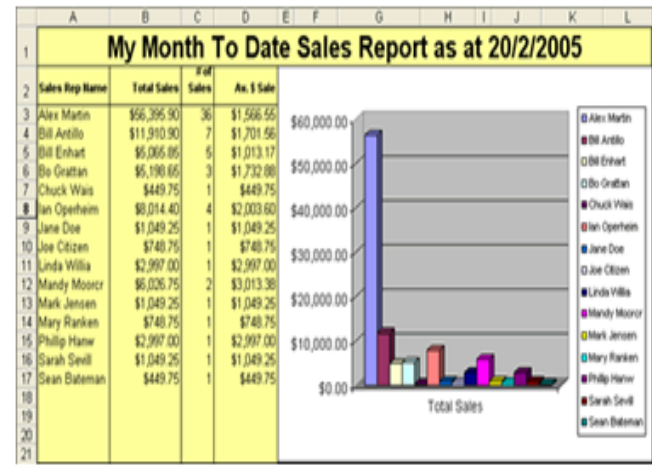
Go from this

| Count | Customer          | Item     | Item Code | Description     | Qty | Unit Price | Unit Cost | Total Value | Month | Year |
|-------|-------------------|----------|-----------|-----------------|-----|------------|-----------|-------------|-------|------|
| 1     | Colson & Co. Inc. | BLACK    | BLK01     | Black Widget    | 1   | 89.00      |           | 89.00       | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | WHITE    | WH01      | White Widget    | 1   | 39.00      |           | 39.00       | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | RED      | RED01     | Red Widget      | 1   | 149.00     |           | 149.00      | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | GREEN    | GRN01     | Green Widget    | 1   | 89.00      |           | 89.00       | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | ROUND    | ROU01     | Round Widget    | 1   | 149.00     |           | 149.00      | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | SQUARE   | SQR01     | Square Widget   | 1   | 149.00     |           | 149.00      | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | TRIANGLE | TRN01     | Triangle Widget | 1   | 149.00     |           | 149.00      | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | WHITE    | WH01      | White Widget    | 1   | 39.00      |           | 39.00       | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | BLACK    | BLK01     | Black Widget    | 1   | 89.00      |           | 89.00       | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | WHITE    | WH01      | White Widget    | 1   | 39.00      |           | 39.00       | 11-05 | 2005 |
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| 1     | Colson & Co. Inc. | TRIANGLE | TRN01     | Triangle Widget | 1   | 149.00     |           | 149.00      | 11-05 | 2005 |
| 1     | Colson & Co. Inc. | WHITE    | WH01      | White Widget    | 1   | 39.00      |           | 39.00       | 11-05 | 2005 |



With SpooliT

To this





## Why export reports into Excel?

### Hardcopy

- Hard copy reports are not flexible
- You cant cut and paste data from hardcopy reports into Excel
- You cannot analyze data from hard copy
- Users working with paper often re key data for analysis in tools such as Excel
- Printers Jam, Run out of paper, Ink cartridges fail, Printers break
- Users pick up the wrong reports by mistake
- Users submit reports for print the go to printers waiting for their reports
- I.T. required to create data extracts into text format so users can import into Excel. This is generally manually and involves some users expertise or involvement.

### Excel

- Users prefer softcopy.
- Most users already have Excel and use it regularly. So why not delivery reports in an Excel or CSV format?
- Users prefer to use Excel, so why force them to print or get I.T. to develop data extracts? (A simple excel template could automatically achieve the result).
- Excel is flexible and versatile.
- Excel contains many great features such as (Graphing, Pivot Tables, Sorting + presentation capabilities)
- Create Automated rules to export reports directly into Excel or CSV – workflow automation
- Create SpooliT Excel templates which generate ‘data sheets’ which are in-turn linked to Excel spreadsheets containing pivot tables and graphs etc.
- Leverage your users knowledge of Excel.
- No more re-keying data from reports into Excel
- No application or programming changes are required. Less cost of ownership.



# How do we export into Excel or CSV?



It is an easy 3 step process in SpooliT.

1. Using a 'report canvas' drag mouse over the report to select data to include in the 'Excel Template'.
2. Save the 'Excel Template'. Once created Excel templates can be reused.
3. Automate the rule (e.g. Real-time, or Day-end etc.)

SpooliT is a rules based system.

- The SpooliT 'Excel template' is itself a series of rules
- Automate the 'Excel template', or you can enable users to 'self service' when they require to export.



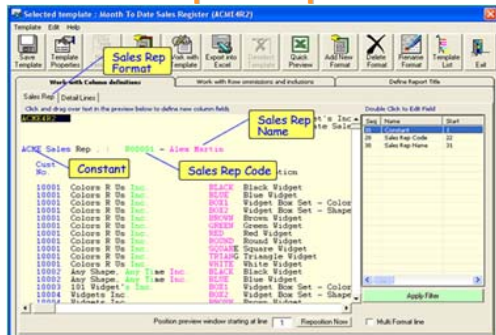
End User Friendly Intuitive Interface



Immediately enhance your workflow



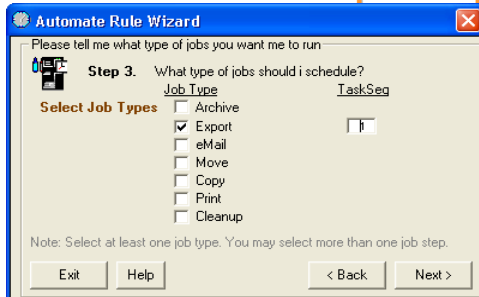
## 1. Excel Template report canvas.



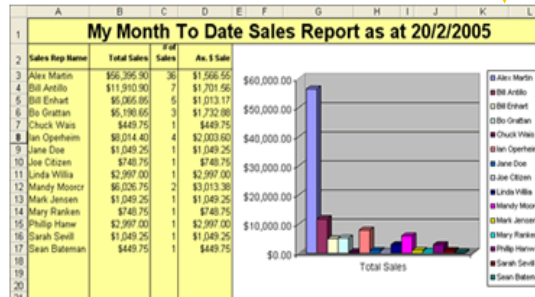
## 2. SpooliT generated Excel or CSV.

| Line | Number | Customer Name             | Item Code | Item Description        | Quantity | Unit Price | Unit Cost | Total Value | Month of Year |
|------|--------|---------------------------|-----------|-------------------------|----------|------------|-----------|-------------|---------------|
| 1    | 10001  | Colors R Us Inc.          | BLACK     | Black Widget            | 5        | 89.95      | 37.5      | 449.75      | 2001          |
| 2    | 10001  | Colors R Us Inc.          | BLUE      | Blue Widget             | 1        | 19.95      | 7.5       | 19.95       | 2001          |
| 3    | 10001  | Colors R Us Inc.          | RED1      | Widget Box Set - Colors | 5        | 995.5      | 99.5      | 4,977.50    | 2001          |
| 4    | 10001  | Colors R Us Inc.          | RED2      | Widget Box Set - Shapes | 4        | 499.5      | 69.5      | 2,997.80    | 2001          |
| 5    | 10001  | Colors R Us Inc.          | BROWN     | Brown Widget            | 15       | 69.95      | 17.5      | 1,049.25    | 2001          |
| 6    | 10001  | Colors R Us Inc.          | GREEN     | Green Widget            | 25       | 29.95      | 9.5       | 748.75      | 2001          |
| 7    | 10001  | Colors R Us Inc.          | RED       | Red Widget              | 3        | 39.95      | 11.5      | 119.85      | 2001          |
| 8    | 10001  | Colors R Us Inc.          | ROUND     | Round Widget            | 15       | 159.95     | 49.5      | 2,399.25    | 2001          |
| 9    | 10001  | Colors R Us Inc.          | SQUARE    | Square Widget           | 5        | 149.75     | 41.5      | 748.75      | 2001          |
| 10   | 10001  | Colors R Us Inc.          | TRIANG    | Triangle Widget         | 25       | 199.95     | 59.95     | 4,998.75    | 2001          |
| 11   | 10001  | Colors R Us Inc.          | WHITE     | White Widget            | 1        | 99.95      | 35.5      | 99.95       | 2001          |
| 12   | 10002  | Any Shape, Any Time Inc.  | BLACK     | Black Widget            | 5        | 89.95      | 37.5      | 449.75      | 2001          |
| 13   | 10002  | Any Shape, Any Time Inc.  | BLUE      | Blue Widget             | 1        | 19.95      | 7.5       | 19.95       | 2001          |
| 14   | 10002  | Any Shape, Any Time Inc.  | RED1      | Widget Box Set - Colors | 5        | 995.5      | 99.5      | 4,977.50    | 2001          |
| 15   | 10002  | Any Shape, Any Time Inc.  | RED2      | Widget Box Set - Shapes | 4        | 499.5      | 69.5      | 2,997.80    | 2001          |
| 16   | 10002  | Widgets Inc.              | BROWN     | Brown Widget            | 15       | 69.95      | 17.5      | 1,049.25    | 2001          |
| 17   | 10002  | Widgets Inc.              | GREEN     | Green Widget            | 25       | 29.95      | 9.5       | 748.75      | 2001          |
| 18   | 10002  | Widgets Inc.              | RED       | Red Widget              | 3        | 39.95      | 11.5      | 119.85      | 2001          |
| 19   | 10002  | Widgets Inc.              | ROUND     | Round Widget            | 15       | 159.95     | 49.5      | 2,399.25    | 2001          |
| 20   | 10002  | Widgets Inc.              | SQUARE    | Square Widget           | 5        | 149.75     | 41.5      | 748.75      | 2001          |
| 21   | 10002  | Widgets Inc.              | TRIANG    | Triangle Widget         | 25       | 199.95     | 59.95     | 4,998.75    | 2001          |
| 22   | 10002  | Widgets Inc.              | WHITE     | White Widget            | 1        | 99.95      | 35.5      | 99.95       | 2001          |
| 23   | 10002  | Los Angeles Widget's Inc. | WHITE     | White Widget            | 1        | 99.95      | 35.5      | 99.95       | 2001          |
| 24   | 10002  | Paris Widget's Inc.       | BLACK     | Black Widget            | 5        | 89.95      | 37.5      | 449.75      | 2001          |
| 25   | 10002  | London Widget's Inc.      | BLUE      | Blue Widget             | 1        | 19.95      | 7.5       | 19.95       | 2001          |
| 26   | 10002  | London Widget's Inc.      | WHITE     | White Widget            | 1        | 99.95      | 35.5      | 99.95       | 2001          |

## 3. Automate Excel Template export



## 4. Master linked to data sheet



## What are the benefits?



Security at  
your finger  
tips



SpooliT always  
delivers



### Perfect Reporting

- Everytime
- Automatically
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- Removes the reliance on hardcopy 'print only' solutions.
- Introduce choice for users and customer via Excel softcopy alternatives.
- Automate delivery of reports into Excel (day-end, month-end etc).
- Reports including any numeric values are prime candidates to be automatically exported into excel.
- Removes repetitive re-keying + analysis because it is automated.
- Create SpooliT 'Excel templates' for finance dept to mine required data from reports and present data via excel. Documents can be automatically saved in the finance folders ready for use.
- Users already use Excel. Leverage their knowledge and present data directly into excel. No need to learn or use new tools.
- Enable user 'self service'. Allow users to convert into Excel when they need. No need to contact I.T to create data extracts.
- Requires no application software changes to implement. Even end users can create their own Excel templates.