


Build Your Own Custom Reports in Intota Assessment


Part 1/2

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
Agenda



- **Webinar Objectives**
- **IA Custom Reports Facts and Functions**
- **Custom Reports Home Page**
 - Selecting a Subject Area
 - Key Menus and Definitions
 - "Catalog" Page Overview
- **Creating Custom Analysis/Report Workflows**
 - Displaying Reports
 - Creating a Graphic
 - Creating Prompts
- **Support Resources**

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Webinar Objectives



- Introduce and familiarize you with the basic "Build Your Own Reports" (BYOR) functionality and terminology;
- Understand and simplify the basic navigation and workflows for creating and saving custom reports in the BYOR tool;
- Provide foundational education that enables you to begin using the custom reports tool.

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IA Custom Report Facts



- Build Your Own (Custom) Reports tool is built on the Oracle Business Intelligence (OBI) platform.
- It's designed to be a back-end reporting tool for organization and institution-level reporting.
- Intended user is an Oracle-savvy and/or technical, development-level users, so it's not overly intuitive.
- Some functions and tools in Custom Reports are not accessible and/or usable and will not reflect your library's data. Training will highlight those areas.
- All Custom Reports are built on a foundation of Counter e-resource usage reports – Book (BR), Database (DB) and Journal (JR)
 - **Note:** Future Custom Reports functionality will include print reporting capability.

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Main Functions of Customized Reports



- Create, edit, and schedule your custom reports.
- Display your data using bar graphs, pie charts, etc.
- Editing features to reports include:
 - Adding/manipulating Columns (Headers) and Metrics
 - Creating Formulas and Filters
 - Apply Formatting
 - Adding Prompts

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Intota Assessment Home Page



Intota Assessment Home Page

Welcome to Intota Assessment

How to Use

- Take a guided tour (YouTube)
- Upcoming Training Webinars
- Resources for college libraries (PDF)
- 360 Counter FAQ
- Find Out What's New

Choose your report

- 360 Counter
- Library
- 360 Usage Statistics

Get Started

Services & Support

Services

- Client Center
- Books in Press

Support

- ProQuest Customer Support
- Blog
- Contact Us

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Reports Page

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HOME Reports

360 COUNTER Reports

Books

- Book Report (DR)
- Book Performance (DR)
- Book Change in Use (DR)
- Book Turnover (DR)
- Book Usage (DR)

Journals

- Journal Report (DR)
- Journal Performance (DR)
- Journal Change in Use (DR)
- Journal Turnover (DR)
- Journal Usage (DR)
- Journal Usage by Fund (DR)
- Journal Usage by Title (DR)
- Journal Usage by Title with CFI (DR)
- Journal Usage by Title with CFI (DR)
- Journal Usage by Title with CFI (DR)
- Journal Usage by Title with CFI (DR)
- Journal Usage by Title with CFI (DR)

Databases

- Database Report (DR)
- Database Performance (DR)
- Database Change in Use (DR)
- Database Turnover (DR)
- Database Usage (DR)
- Database Usage by Fund (DR)
- Database Usage by Title (DR)
- Database Usage by Title with CFI (DR)
- Database Usage by Title with CFI (DR)
- Database Usage by Title with CFI (DR)
- Database Usage by Title with CFI (DR)

Analytics

- Analytics Report (DR)
- Analytics Performance (DR)
- Analytics Change in Use (DR)
- Analytics Turnover (DR)
- Analytics Usage (DR)
- Analytics Usage by Fund (DR)
- Analytics Usage by Title (DR)
- Analytics Usage by Title with CFI (DR)
- Analytics Usage by Title with CFI (DR)
- Analytics Usage by Title with CFI (DR)

Library Reports

Books

- Book Report (DR)
- Book Performance (DR)
- Book Change in Use (DR)
- Book Turnover (DR)
- Book Usage (DR)

Journals

- Journal Report (DR)
- Journal Performance (DR)
- Journal Change in Use (DR)
- Journal Turnover (DR)
- Journal Usage (DR)
- Journal Usage by Fund (DR)
- Journal Usage by Title (DR)
- Journal Usage by Title with CFI (DR)
- Journal Usage by Title with CFI (DR)
- Journal Usage by Title with CFI (DR)

Databases

- Database Report (DR)
- Database Performance (DR)
- Database Change in Use (DR)
- Database Turnover (DR)
- Database Usage (DR)
- Database Usage by Fund (DR)
- Database Usage by Title (DR)
- Database Usage by Title with CFI (DR)
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Analytics

- Analytics Report (DR)
- Analytics Performance (DR)
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- Analytics Turnover (DR)
- Analytics Usage (DR)
- Analytics Usage by Fund (DR)
- Analytics Usage by Title (DR)
- Analytics Usage by Title with CFI (DR)
- Analytics Usage by Title with CFI (DR)
- Analytics Usage by Title with CFI (DR)

360 Usage Statistics

Click Through

- By Title and Database (coming soon)
- By Title and CFI (coming soon)
- By Title and CFI (coming soon)

Search and Browse

- By Title Type
- By Title Type
- By Title Type

360 Link Usage

- By Title and Database (coming soon)
- By Title and CFI (coming soon)
- By Title and CFI (coming soon)

360 Usage Usage

- By Title and Database (coming soon)
- By Title and CFI (coming soon)
- By Title and CFI (coming soon)

Build Your Own Reports

Customize

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Customization Home Page

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HOME Reports

Customization Home Page

Recent

- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report

Most Popular

- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report

The Catalog allows you to view and organize your saved custom reports. You can also schedule a custom report from the Catalog page and send it to designated recipients.

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Customization Home Page

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HOME Reports

Customization Home Page

Recent

- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report

Most Popular

- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report
- Database Usage - Database Report

Don't use this section of the Customization Home page. It contains no institution-specific reports.

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Menus and Definitions

Analysis and Interactive Reporting

- Click **Analysis** and choose a Subject Area (based upon Counter eBook, Database or Ejournal reports), then takes you to the Report Editor page.

Published Reporting/Report Job

- Do not use this function.

Actionable Intelligence

- Agent** link allows you to automate the running and distribution (scheduling) of custom reports.

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Catalog Page

You only have access to your Library folder where you'll save your Custom Reports.

The remainder of the folders and reports are not accessible.

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Begin Creating Custom Reports

Choose Analysis from the Menu to begin creating a custom report.

- Remember: "Analysis" is the Oracle word for a Report
- To create a new Analysis/Report you must first select the Subject Area
- The Subject Area is the foundational layer of the analysis and represents the type of data that will be included in the custom report.

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Analysis Editor Page

You'll be navigated to this Analysis Editor page where you construct the actual Analysis/Report.

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Analysis Editor Page

Analysis Editor lets you create the Custom Report you want and present it in tables, graphs, charts, pivot tables, etc.

Results Tab: Generate and view the report you are building. Results tab allows you to create different views of the analysis results such as graphs, tickers, and pivot tables.

Criteria Tab: Specify the criteria for an analysis/report, including columns and filters; the order in which the results should be returned, formatting of headers & decimal places; font style and colors; column formulas (e.g. Rank or Percentile).

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Analysis Editor Page

Subject Areas (based upon which one you chose) contains all of the data and values available to include in your Analysis/Report.

Metrics - Numeric values that can be calculated. Available Metrics for your report depend upon the Subject Area you chose (Counter Book/Database/Journal).

Headers - Non-numeric values that define the columns in your Analysis/Report.

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Identify Metrics and Headers

Home Reports Build Your Own Reports - Customization

Criteria Results

Subject Areas

Counter Database Author

Database Cost

DB1 Record View

DB1 Result Click

DB1 Search Fed

DB1 Search Reg

DB1 Session Fed

DB1 Session Reg

DB2 Count

DB2 No License

DB2 Turnover

DB2 Other

DB2 Multimedia

Header

Fund Name

Provider

PIY

Authority Database Name

Year

Month Year

Dynamic TimePeriod

Database Name

Selected Columns

Database Name [X] Authority Database Name [X] Month Year [X] Provider [X] Database Cost [X] DB1 Record View [X] DB1 Result Click [X]

Filters

Add Filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, clicking on add button after selecting its name in the catalog pane.

Add Filters Here.

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Editing Metrics and Headers

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Headers

Database Name [X] Authority Database Name [X] Month Year [X] Provider [X] Database Cost [X] DB1 Record View [X]

Metrics

Database Cost [X] DB1 Result Click [X]

Sort

Edit Formula

Column Properties

Filter

Delete

Sort

Sort Ascending

Sort Descending

Add Ascending Sort

Add Descending Sort

Clear Sort

Clear All Sorts in All Columns

Small bulleted Menu icon next to the Header or Metric to Filter, Formula or Column Properties.

Drag-and-drop Headers and Metrics to reorder them.

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Creating a Report - Add/Edit a Formula

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Edit Column Formula

Header

Provider

Column Formula

Formula

Folder Heading Metrics

Column Heading DB Cost

Custom Headings

Contains HTML Markup

Aggregation Rule (Totals Row)

Default (Sum)

Available

Subject Areas

Counter Database Author

Database Cost

DB1 Record View

DB1 Result Click

DB1 Search Fed

DB1 Search Reg

DB1 Session Fed

DB1 Session Reg

DB2 Count

DB2 No License

DB2 Turnover

DB2 Other

DB2 Multimedia

Header

Filter...

Column...

Variable...

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Creating a New Report - Column Properties

Change the Headers by Clicking the Custom Headers box.

Override the default data formatting settings.

Change the style under a condition of the Header (e.g. red background for zero usage).

Previous events, etc. report.

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Creating a New Report - Add a Filter

Choose an Operator for the type of Filter to be applied.

Then input a Value in the space provided.

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Results Tab

Click the Results tab when you're ready to generate the report. Toggle between the Criteria tab (Analysis Editor) and Results tab to view changes or edits to your report.

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[illegible]

Save Your Analysis/Report

Save As

Save In: /Shared Folders/Library

Folders

- My Folders
 - Subject Area Contents
 - My Dashboard
- Shared Folders
 - 360 Analysis Widgets
 - 360 Analytics
 - 360 Counter
 - Collection Analysis
 - Components
 - Consortium
 - Demo
 - Exceptions
 - Libots
 - Library**
 - TrackOriginal
 - Sample Site
 - Test
 - Quick WinStats
 - Usage Tracking

File Name: 361 Journal Usage Report
 Description: Created July 8, 2013 by S.Shull

OK Cancel

Click on the far right "Save As" icon.

Save Your Analysis/Report

Compressed Layout

Title
June 2015 DB Usage Analysis

Year Database Name

Edit the Title of the report using the pencil icon.

2,200
3,000
3,600

African American Music Reference
American History in Video
American Song
Art and Architecture Video
Black Studies in Video
Classical Music Library
Classical Music Reference Library
Classical Music in Video
Classical Scores Library, Volume 1
Classical Scores Library, Volume 2
Contemporary World Music
Counseling and Therapy in Video, Volume 1
Counseling and Therapy in Video, Volume 2
Counseling and Therapy in Video, Volume 3
Current Affairs in Video
Dance in Video
Education in Video
Ethnographic Video Online

Creating a Bar Graph / Graphic

Format Container changes the style of the graph (alignment, borders, color)

Scroll to bottom of the Analysis to view your Graph

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Prompts


- Prompts allow you to create pull down menus that can filter the datasets you've chosen in your Analysis (e.g. Fiscal Year, Provider)
- Prompts can be created in Compound Layout view (Analysis) and/or in a Graph view
- Prompts must be added separately in Compound and Graph views. You will not see a Prompt created in Compound Layout in the Graph below; you have to create a separate Prompt for the Graph view.

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Prompts

Click the Pencil Icon to edit the Prompts in the Graph or Table View (shown).

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Support Center Documentation Resources

- [Intota Assessment User Guide](#)
- [Build Your Own Reports](#)
- [Presentation PPT Slides](#)
For this webinar and all publicly offered webinar trainings.

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THANK YOU!

<http://www.proquest.com/go/trainingeval>
