# 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**



## 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.

## 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.

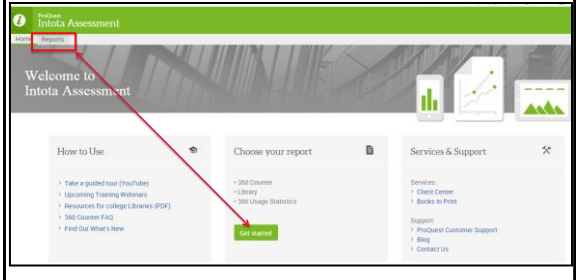


## Main Functions of Customized Reports

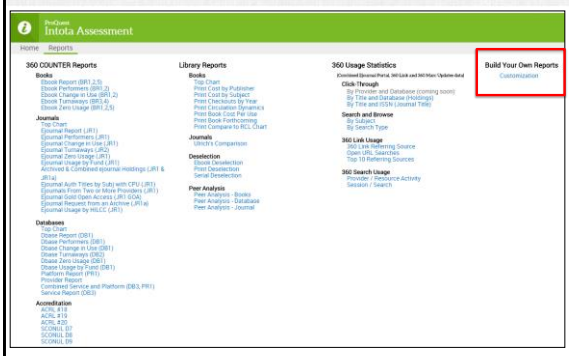
- Create, edit, and schedule your custom reports.
- Display your data using bar graphs, pie charts, etc.
- Editing features to reports include:
  - Adding/manipulating Columns (Headers) and Metrics
  - Creating Formulas and Filters
  - Apply Formatting
  - Adding Prompts



## Intota Assessment Home Page

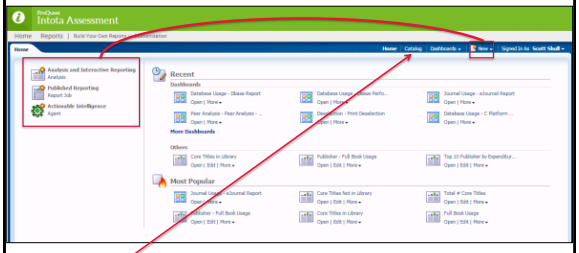


## Reports Page





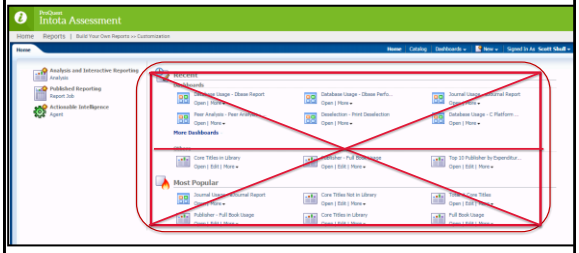

## Customization Home Page




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.

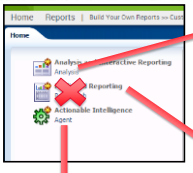


## Customization Home Page




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

## 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.

You'll begin building your Custom Reports using ***Analysis.***

**Published Reporting/Report Job**

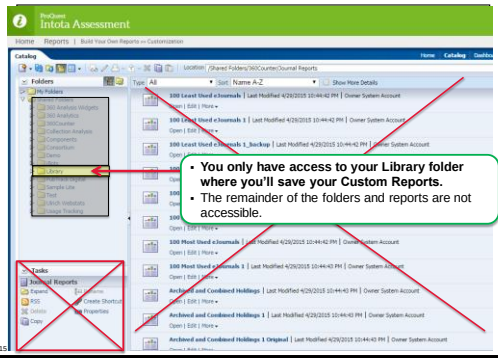
- **Do not use this function.**

**Actionable Intelligence**

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



## Catalog Page

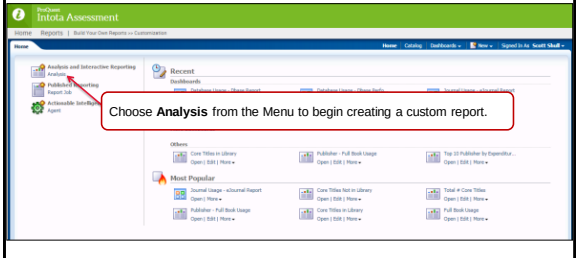



- **You only have access to your Library folder where you'll save your Custom Reports.**
- The remainder of the folders and reports are not accessible.



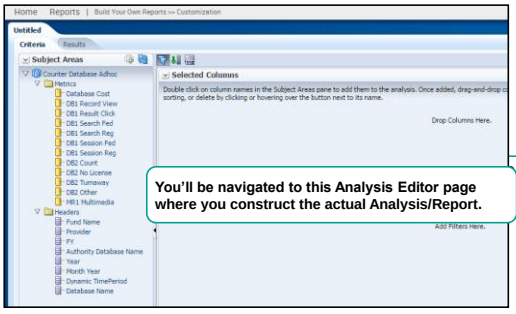
## Begin Creating Custom Reports

- 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.




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

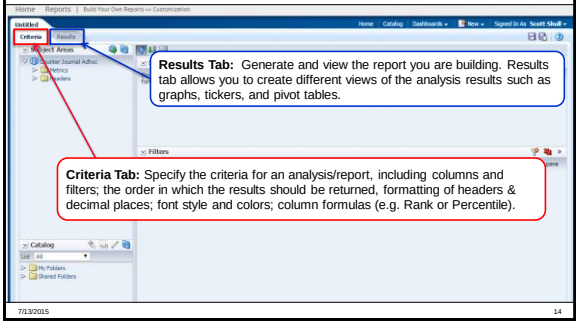
## Analysis Editor Page




7/13/2015 13

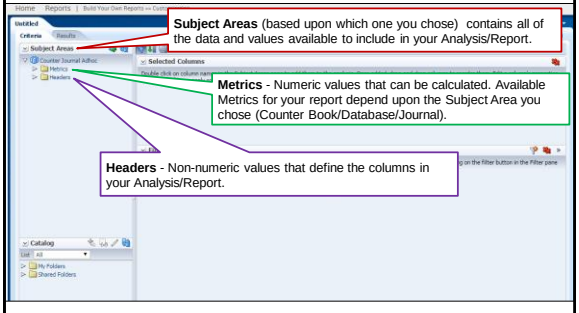
## Analysis Editor Page

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



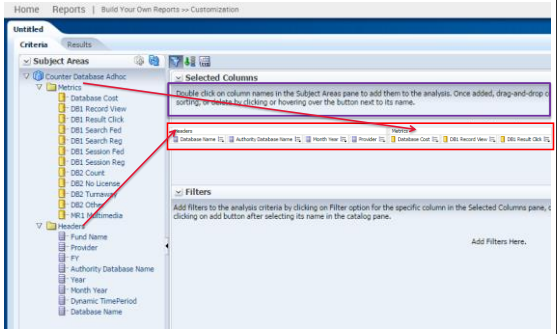

7/13/2015 14

## Analysis Editor Page



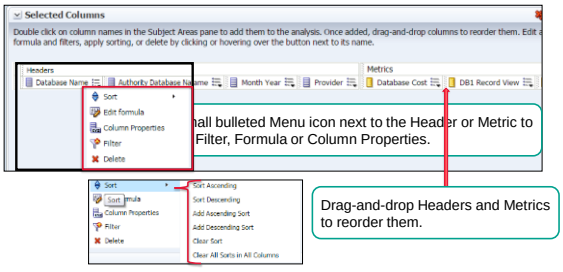

7/13/2015 15

## Identify Metrics and Headers






## Editing Metrics and Headers

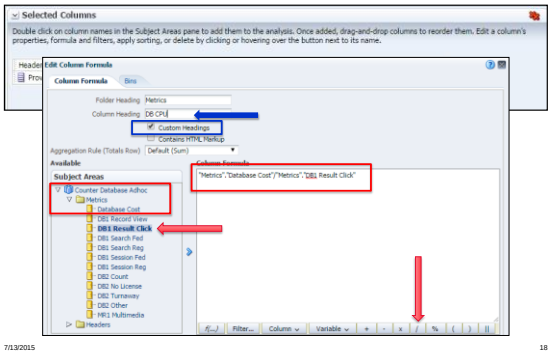



hall bulleted Menu icon next to the Header or Metric to Filter, Formula or Column Properties.

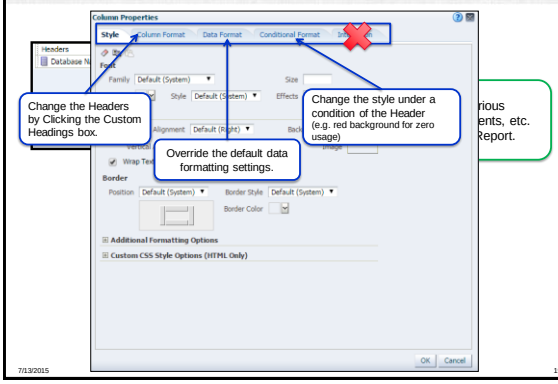
Drag-and-drop Headers and Metrics to reorder them.



## Creating a Report – Add/Edit a Formula

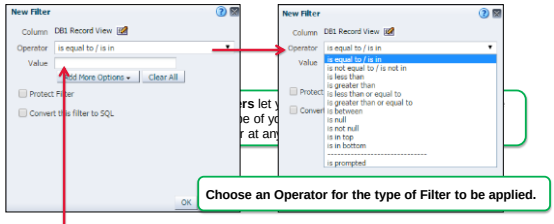


## Creating a New Report - Column Properties



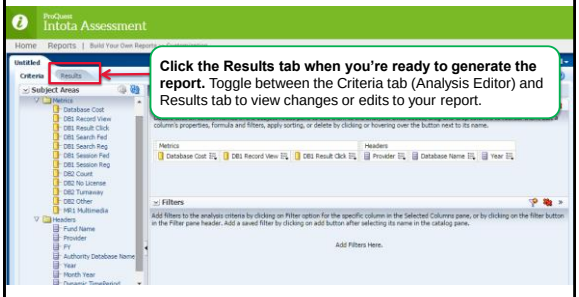



## Creating a New Report - Add a Filter

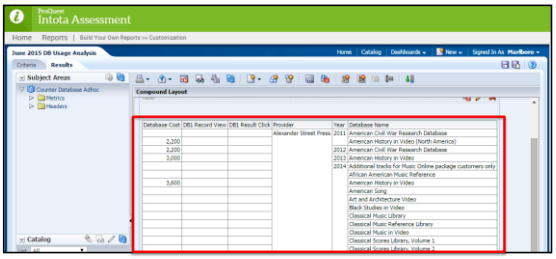





## Results Tab

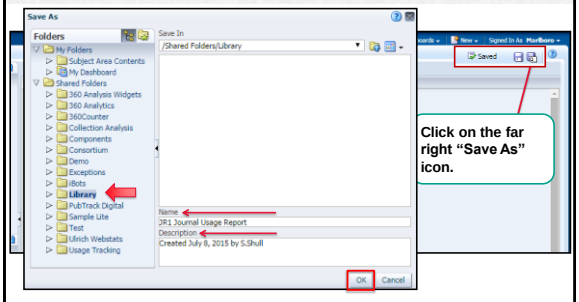


## View Your Analysis/Report






## Save Your Analysis/Report



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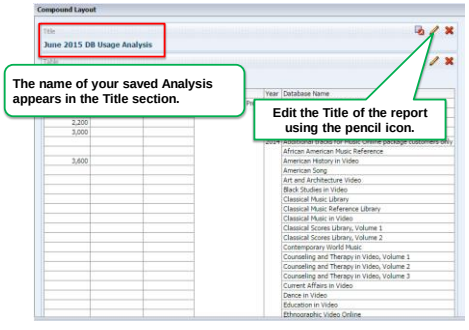
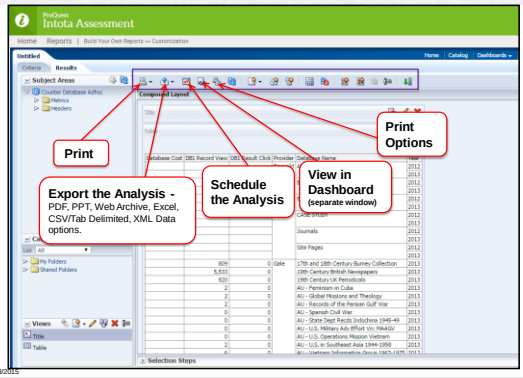
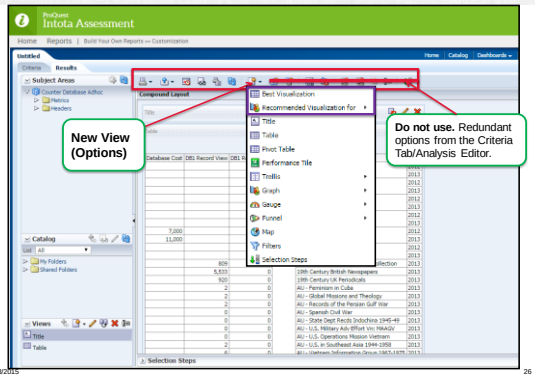


## Results Tab Toolbar



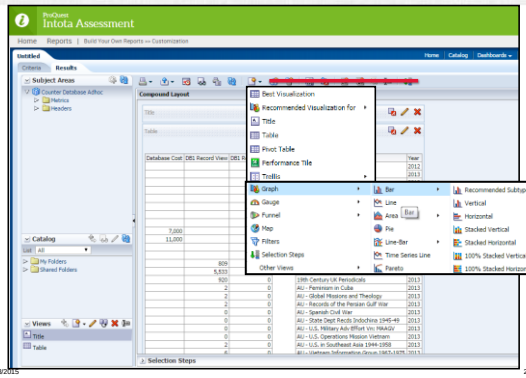



## Results Tab Toolbar






## Creating a Bar Graph / Graphic



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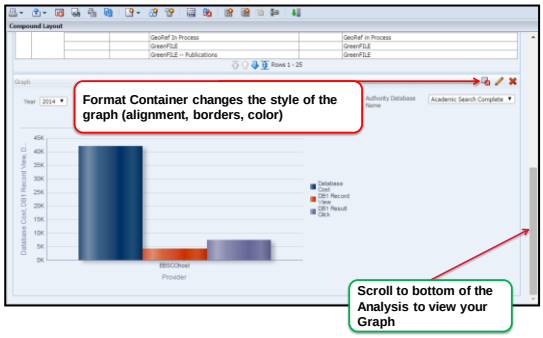
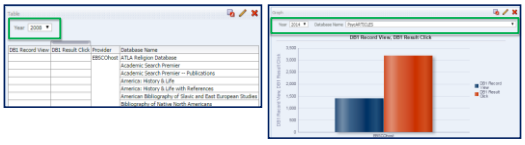




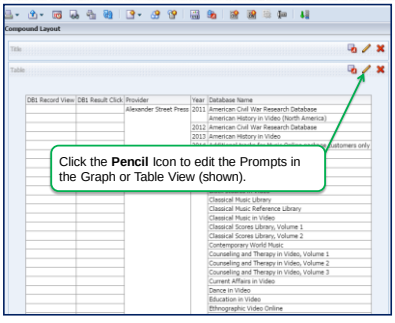

## Prompts

- 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.



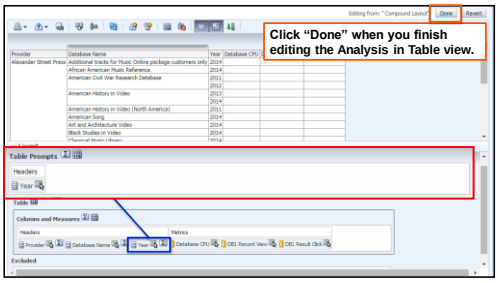


## Prompts



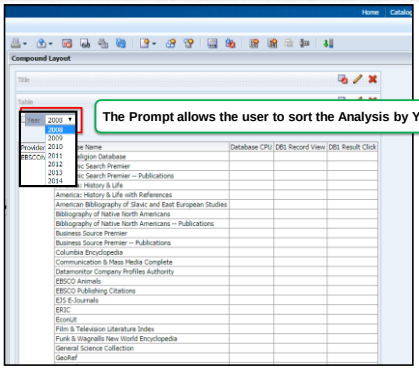
## Prompts

Drag the Metric/Header that you wish you use as an Analysis (Table) Prompt, allowing users to filter the Analysis by the Metric or Header chosen.





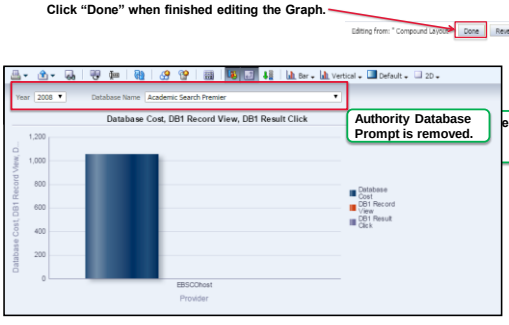

## Prompts






## Prompts

Click "Done" when finished editing the Graph.



## Support Center Documentation Resources

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



# *THANK YOU!*

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