



GALE

CENGAGE Learning™

Gale Usage Web Portal

Quick Start Guide: Running Reports

Quick Start: Common Reporting Tasks

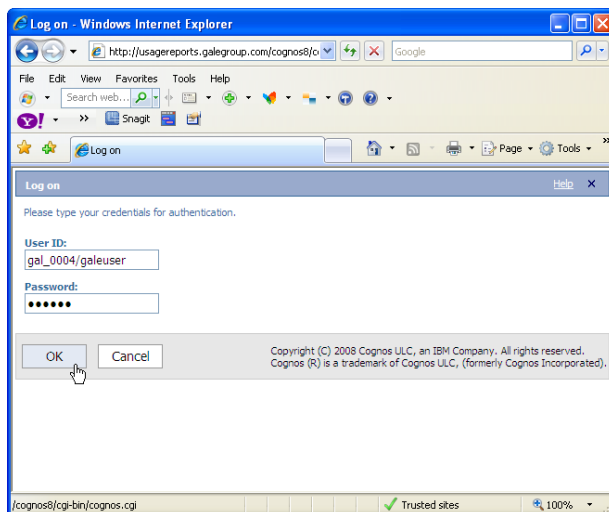
This **Quick Start Guide** provides instructions for the common reporting tasks in the Gale Usage web portal. For comprehensive coverage of all the features of the portal, please download the complete **User Guide** available at <http://www.gale.cengage.com/usage>.

Note: This guide assumes you have successfully configured your Microsoft Internet Explorer or Firefox web browser according to the instructions provided in the **User Guide** or the **Quick Start: Browser Setup** companion.

Logging In

1. Using either Microsoft Internet Explorer or the Firefox browser, navigate to the address: <http://usagereports.galegroup.com/cognos8>
2. At the log on page, enter your portal User ID and Password and click the **OK**.

Note: If you don't know your User ID/Password, e-mail Gale Technical Support at gale.technicalsupport@cengage.com or call 1-800-877-4253 Option 4.









3. This will open the Gale Usage portal.

Report Format – Default Output Type

Every report in the portal is listed next to an icon that identifies its default output format. The report will be delivered in this format unless you specify otherwise.

The default output format for COUNTER reports is Microsoft Excel 2007. The default output format for all other reports is HTML. Custom views may be saved with the default output format of your choosing.

Output format icons:

-  - Report is output as HTML, viewable in your web browser.
-  - Report is output as a PDF, viewable with Adobe Acrobat or other compatible software.
-  - Report is output as a Microsoft Excel 2007 file.
-  - Report is output as a Microsoft Excel 2002 file.
-  - Report is output as a Comma Separated Value file (CSV).
-  - Report is output as an XML file.

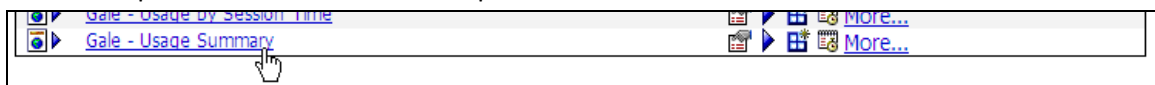
How to Run a Report – Gale Customer Reports tab

The **Gale Customer Reports** tab contains all the standard reports that are available to you. You can run these reports in your browser or save them to the **My Folders** tab to create custom views of your usage statistics. Follow these steps to run any of the standard reports in your browser.

1. Locate the desired report in the **Gale Customer Reports** tab.



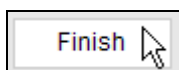
2. Click the report's name to launch the report viewer.



3. Reports in this tab always give you the option to customize the date range and other details of the report (a complete list of prompts can be found at the end of this guide).

Use the available prompts to configure the report as desired, or do nothing to accept the default values.

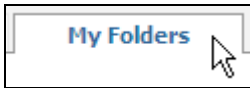
4. Click the **Finish** button. The report will display in its default output format.



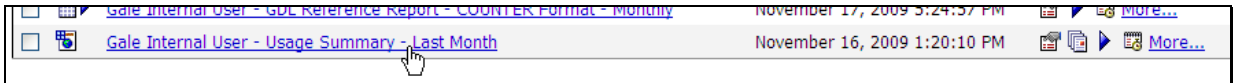
How to Run a Report – My Folders tab

The **My Folders** tab contains all the custom report views you have created. Custom views may contain saved prompt values. If you find yourself running the same report repeatedly, creating a custom view with saved prompts will save time and make it easier to access the report in the future. (See: in **How to Create a Report View.**)

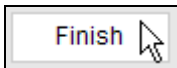
1. Locate the desired report in the **My Folders** tab.



2. Click the report view's name to launch the report viewer.



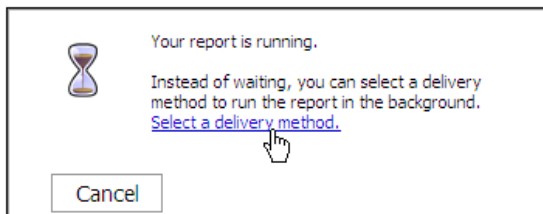
3. If prompt values have been saved, the report will run immediately. If no prompt values have been saved, you have the option to customize the date range and other details of the report as explained in **How to Run a Report – Gale Customer Reports tab** above.
4. Click the **Finish** button. The report will display in its default output format.



How to E-mail a Report (One Time)

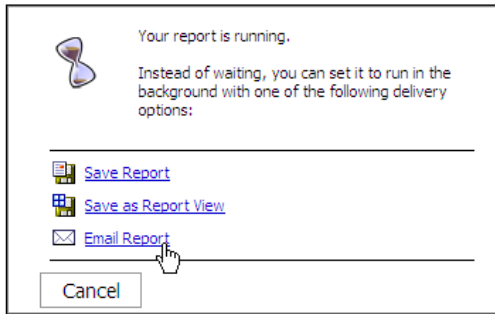
Depending on the prompts you select, some large reports may take several minutes to run. Instead of waiting for them to display in your browser window, you may choose to have these reports run in the background and the portal will deliver them to you by e-mail when they are complete.

1. Locate the desired report and run it.
2. After you click the **Finish** button, you will see the following status message:



3. Click the **Select a delivery method** link.

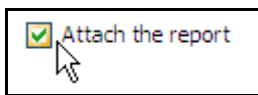
4. You will be prompted to select a delivery method. Click the **E-mail Report** link.



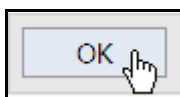
5. Enter your e-mail address (you may specify multiple addresses in the To: and CC: lines). You may also edit the Subject line and add text to the main body of the message.



6. Check the **Attach the report** box.



7. Click the **OK** button to return to the main window.

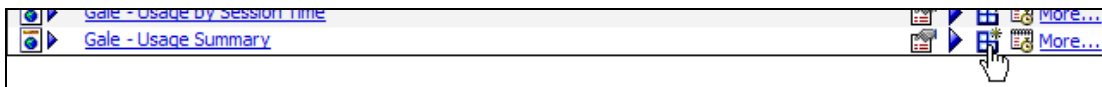


How to Create a Report View

Report views allow you to configure specific views of your usage statistics by saving prompt values. This feature saves time and makes it easier to access the reports you run most often. Report views can also be scheduled to run recurrently. There is no limit to the number of report views you may create. Report views must always be saved in the **My Folders** tab.

1. Locate the standard report for which you would like to create a custom view.
(We'll use the Usage Summary report as an example)

2. Click the **Report View** icon



3. Give the report view a meaningful name; Description and a Screen Tip are optional.

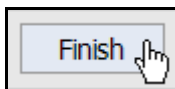
A screenshot of a configuration dialog box. It has three sections: 'Name:' with a text box containing 'Report View of Gale - Usage Summary'; 'Description:' with a large text area; and 'Screen tip:' with a text box.

4. Under **Location**, click the **Select My Folders** link



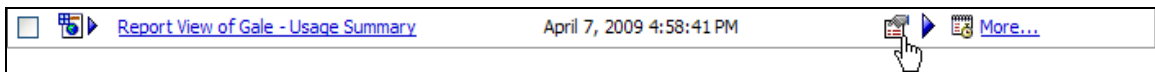
If you fail to do this, your report view will not be properly saved.

5. Click the Finish button to save the report view and return to the main window.



How to Save Prompts in a Report View

1. If you haven't already done so, first create a report view of the desired report as described in **How to Create a Report View**
2. Locate the desired report in your **My Folders** tab.
(We'll use the **Report View of Gale - Usage Summary** report view as an example)
3. Click the **Properties** button for the report view.



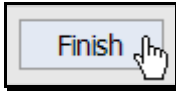
4. Select the **Report View** tab



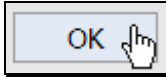
5. Under **Prompt Values**, uncheck the **Prompt for values** box, then click the **Set** link.



- Set the prompts to the desired values
- Click the **Finish** button to save your prompts and return to the report view properties page.

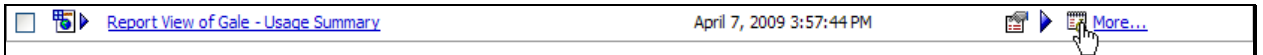


- Click the **OK** button to save your changes.

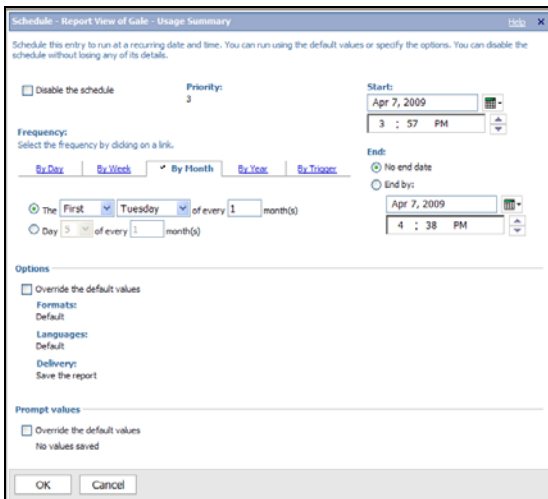


How to Schedule a Report to Run Recurrently

- If you haven't already done so, first, create a report view of the desired report as described in **How to Create a Report View**
Note: If you want multiple schedules for a given report, you'll need to create a separate report view for each schedule.
- Locate the desired report in your **My Folders** tab.
(We'll use the **Report View of Gale - Usage Summary** report view as an example)
- Click the **Schedule** icon.



- Specify the details of the schedule



- Disable the schedule** – Select this if you wish to define the schedule, but not let it run yet.
- Start** – The schedule will not begin until after this date

- c. **End** – The schedule will stop running after this date
- d. **Frequency** – Select the frequency with which you want the report to be run. For example, if you want the report to run on the 5th of each month, you would set the frequency of the schedule like this:

Frequency:
Select the frequency by clicking on a link.

By Day | By Week | **By Month** | By Year | By Trigger

The First Tuesday of every 1 month(s)

Day 5 of every 1 month(s)

- e. **Options** – Click **Override the default values** if you would like to change the output format or set up e-mail delivery for the scheduled report.

E-mail Delivery

- i. Check **Send a link to the report by email** and click **Edit the options ...**

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

Save the report

Print the report

Printer location:
[Field] [Select a printer...](#)

Send a link to the report by email [Edit the options...](#)

0 recipients

- ii. Enter your e-mail address (you may specify multiple addresses in the To: and CC: lines). You may also edit the Subject line and add text to the main body of the message.

Set the email options - Gale Internal User - Usage Summary - Last Month

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To: [Field]

Cc: [Field]

[Select the recipients...](#) [Show list](#)

Subject: Report: Gale Internal User - Usage Summary - Last Month

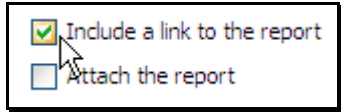
Body: [Change to plain text >>](#) [Rich Text Editor]

Include a link to the report

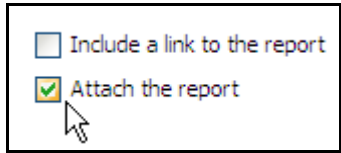
Attach the report

OK Cancel

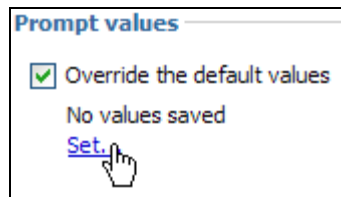
- iii. By default, the e-mail will contain a link to your report. Clicking the link will open the report in your Web browser.



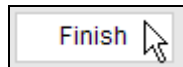
- iv. If you would rather receive your report as an attachment, uncheck **Include a link to the report** and check **Attach the report** instead.



- f. **Prompt values** - If you have saved prompt values in the report view, you can leave the **Override the default values box** unchecked to use the saved prompts. Otherwise, you must check this box and click the **Set** link to set the prompt values for this schedule.

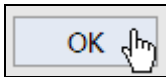


Then click the **Finish** button to save the prompt values.



Note: If there are no prompt values specified for the schedule, the report will fail to run.

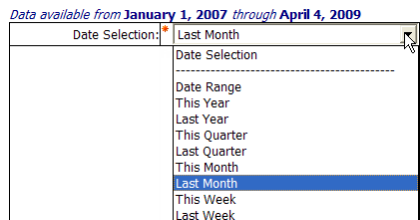
- 5. Click the **OK** button to save the schedule



Common Report Prompts

These are some of the most common report prompts you will find in the reports.

Date Selection prompt



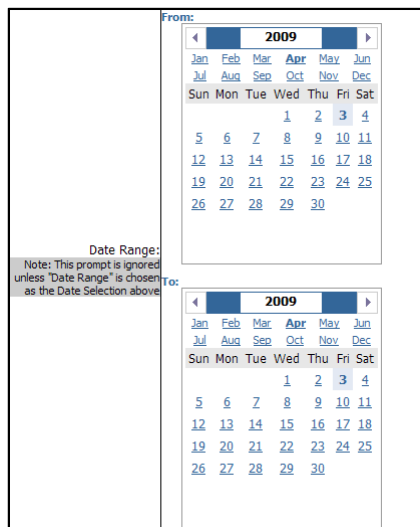
This allows you to run the report for a relative date range (ex: all of **Last Month**), or you can select **Date Range** which allows you to use the **Date Range** prompt to select a specific date range.

Most reports default to running for **Last Month**.

The top of the Date Selection prompt shows you the date range for which data is currently available. There is typically a two or three-day delay before data will be available (ex: on April 6, you should be able to see data up to and including April 4).

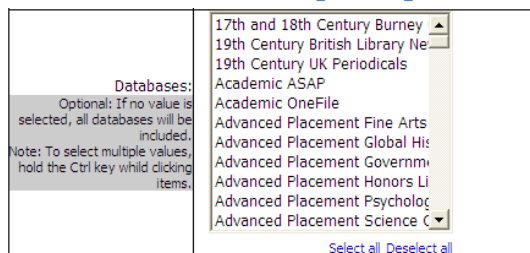
If your date selection falls outside of this date range, you will see a warning in the report header. This warning is only available when the report format is HTML, PDF, Excel 2007, or Excel 2002 (i.e. not CSV or XML).

Date Range prompt



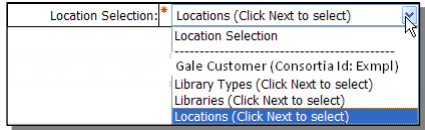
This prompt is only used when **Date Range** is selected in the **Date Selection** prompt. If any of the relative dates are selected in that prompt, the **Date Range** prompt is ignored.

Database Selection prompt



The Database Selection prompt lets you choose which databases you want included in the report. By default, all databases are included. Use this prompt only if you wish to limit the report to specific databases.

Location Selection prompt



The Location Selection prompt lets you choose the location, or locations that you want included in the report.

The first option will always be the default value. The description will be specific to each user and includes all of the locations available to the user. In the above example, the user can access all locations under the location “Gale Customer” (with a consortium id of “Exmpl”).

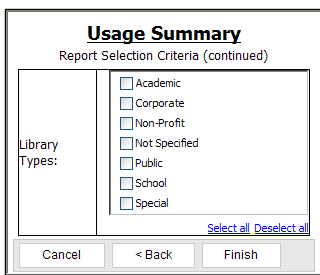
If this first option is selected, you do not need to go to the second prompt screen.

The remaining options will vary for each user depending on the locations they have available to them. If you select any of these options, you will need to click the Next button to see the selected prompt.

- **Library Types**
If you have access to multiple library types, this option will be available.
- **Libraries**
If you have access to multiple libraries, this option will be available.
- **Locations**
If you have access to multiple locations, this option will be available.

*If you select any of the above three options, remember to click the **Next** button at the bottom of the prompt page.*

Library Types prompt



If you selected Library Types in the Location Selection prompt (and clicked **Next**), you will be presented with the Library Types prompt.

Note: this prompt is not available for the Counter reports.

This lists the available library types.

Some reports will allow you to select multiple values. If the options are listed with check-boxes () , you can select any values you need. If the options have radio buttons () next to them, you will only be able to select a single value.

After selecting the desired library types, click the **Finish** button.

Libraries prompt

The screenshot shows a dialog box titled "Usage Summary" with the subtitle "Report Selection Criteria (continued)". On the left, there is a vertical label "Libraries:". The main area contains a list of two items: "Sample Library 1 (lib01)" and "Sample Library 2 (lib02)", each with an unchecked checkbox. At the bottom right of the list area, there are two blue links: "Select all" and "Deselect all". At the bottom of the dialog box, there are three buttons: "Cancel", "< Back", and "Finish".

If you selected *Libraries* in the Location Selection prompt (and clicked **Next**), you will be presented with the Libraries prompt.

This lists the available libraries.

Some reports will allow you to select multiple values. If the options are listed with check-boxes () , you can select any values you need. If the options have radio buttons () next to them, you will only be able to select a single value.

After selecting the desired libraries, click the **Finish** button.

Locations prompt

The screenshot shows a dialog box titled "Usage Summary" with the subtitle "Report Selection Criteria (continued)". On the left, there is a vertical label "Locations:". The main area contains a list of three items: "Sample Location 1 (loc01)", "Sample Location 2 (loc02)", and "Sample Location 3 (loc03)", each with an unchecked checkbox. At the bottom right of the list area, there are two blue links: "Select all" and "Deselect all". At the bottom of the dialog box, there are three buttons: "Cancel", "< Back", and "Finish".

If you selected *Locations* in the Location Selection prompt (and clicked **Next**), you will be presented with the Locations prompt.

This lists the available locations.

Some reports will allow you to select multiple values. If the options are listed with check-boxes () , you can select any values you need. If the options have radio buttons () next to them, you will only be able to select a single value.

After selecting the desired locations, click the **Finish** button.