Gale Usage Web Portal

User Guide

Last Update: November 18, 2009

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Setting Up Your Web Browser

In order to allow the Gale Usage web portal to interact fully with your web browser, you may need to make some changes to your browser settings. This will allow the portal to open pop-up windows and download reports without changing the way the browser functions on other web sites.

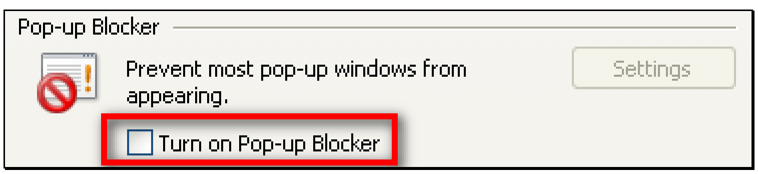
Internet Explorer

Disable the IE Pop-Up Blocker When On the Portal

1. From the menu, select **Tools**->**Internet Options**
   (Note, if you don't see the menu, you may need to press the **Alt** key to display it)

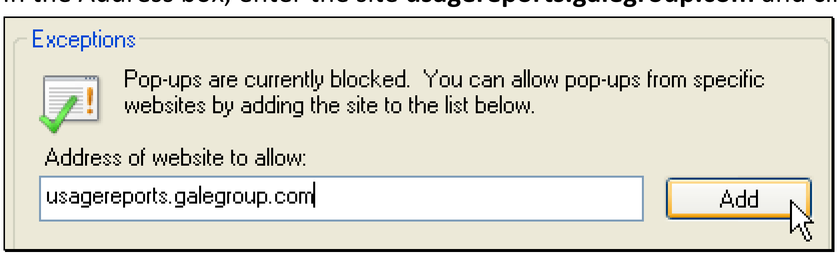
2. Select the Privacy tab

3. If the pop-up blocker is not turned on, you don't have to do anything else and can click the **Cancel** button.

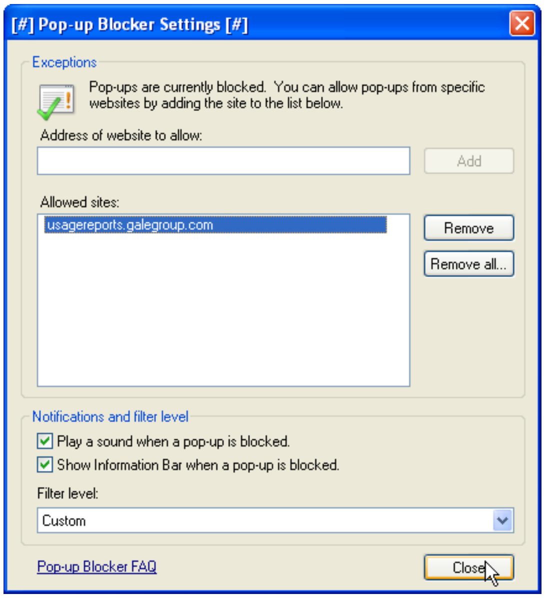


4. If the IE pop-up blocker is turned on, click the Settings button.

5. In the Address box, enter the site **usagereports.galegroup.com** and click the **Add** button



6. Click **Close** to save your changes



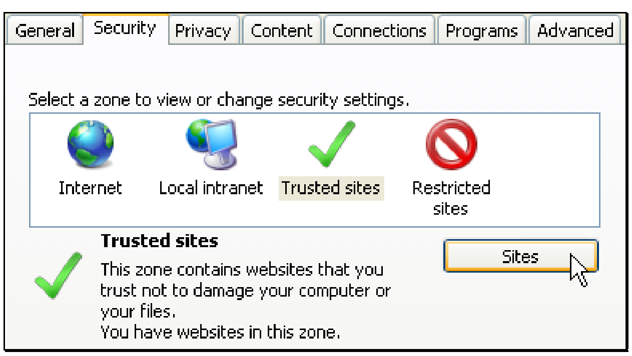
7. Click **OK** to close Internet Options

Make the Portal a Trusted Web Site

1. From the menu, select **Tools**->**Internet Options**
   (Note, if you don't see the menu, you may need to press the **Alt** key to display it)

2. Click on the Security tab

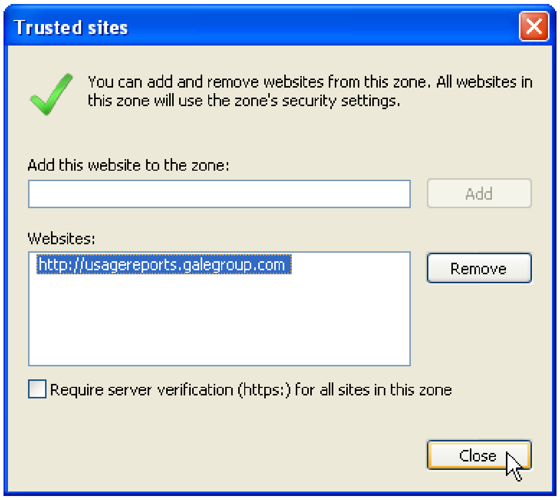
3. Click on the **Trusted sites** icon and click the **Sites** button



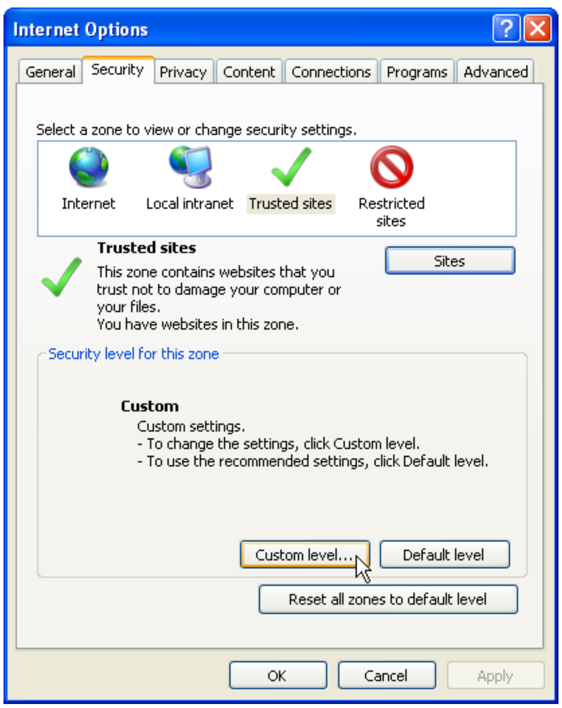
4. If the **Require server verification** box is checked, click it to un-check it.

5. In the website box, enter **http://usagereports.galegroup.com**, and click the **Add** button

6. Click the **Close** button to save your change.

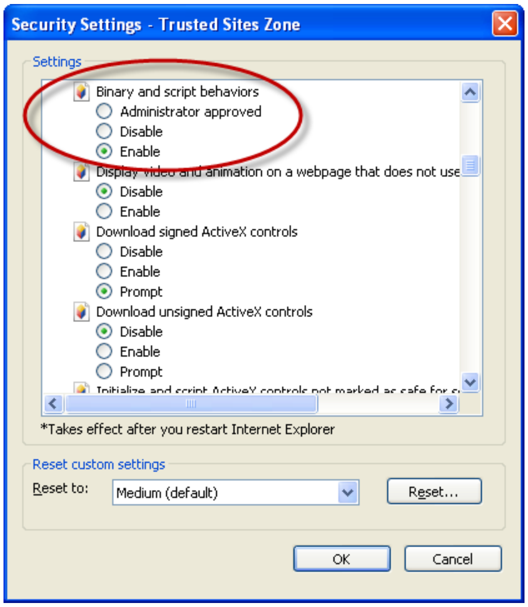


7. Click on the **Custom level** button

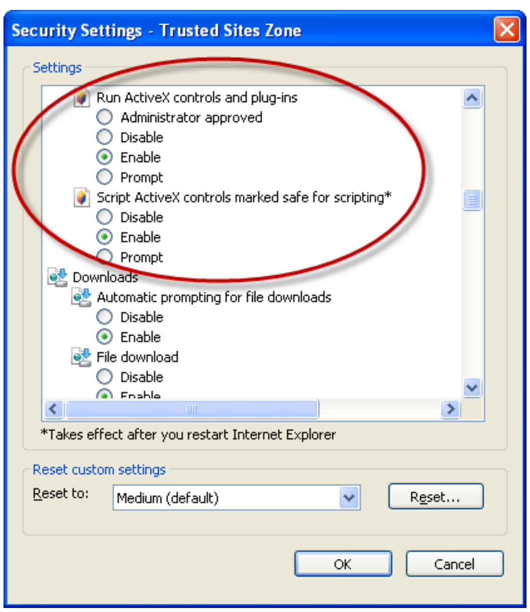


8. Scroll down to the **ActiveX controls and plug-ins** section and enable the **Binary and script behaviors**, **Run ActiveX controls and plug-ins** and **Script ActiveX controls marked safe for scripting** options.

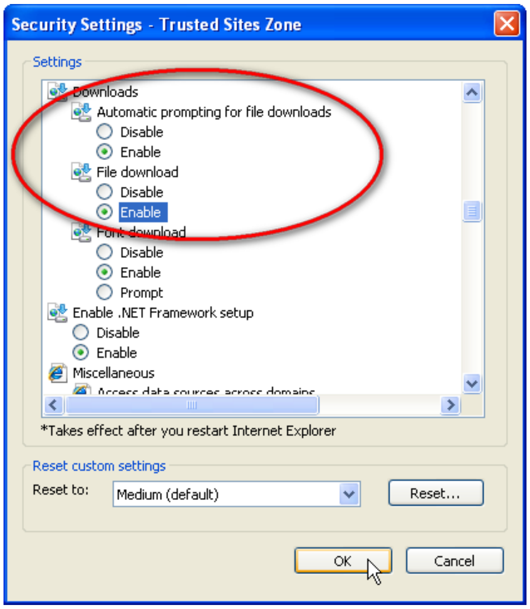
ActiveX controls and plug-ins > Binary and script behaviors



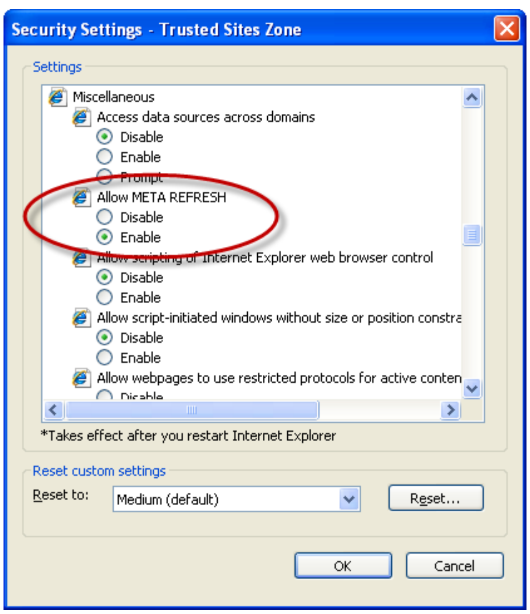
ActiveX controls and plug-ins > Run ActiveX controls and plug-ins, Script ActiveX controls marked safe for scripting



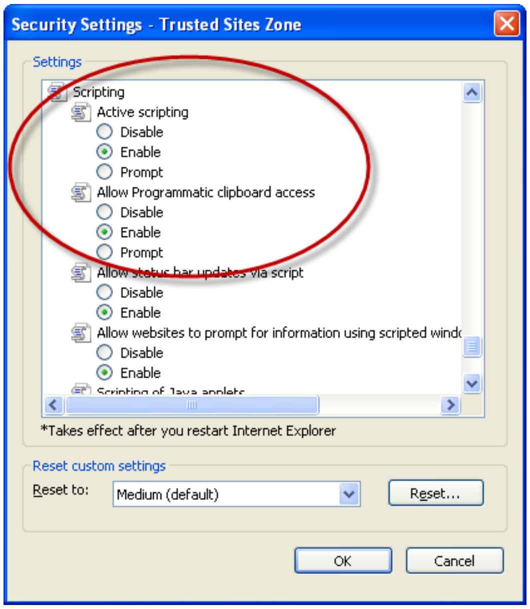
9. Scroll down to the **Downloads** section and enable the **Automatic prompting for file downloads** and **File download** options.



10. Scroll down to the **Miscellaneous** section and enable the **Allow META REFRESH** option.



11. Scroll down to the **Scripting** section and enable the **Active scripting** and **Allow programmatic clipboard access** options.



12. Click **OK** to confirm the custom security settings for trusted sites.

13. Click **OK** to close the Internet Options window.

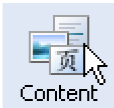
14. Restart Internet Explorer if prompted to do so.

Firefox

Disable the Firefox Pop-Up Blocker When On the Portal

1. From the menu, select **Tools->Options**

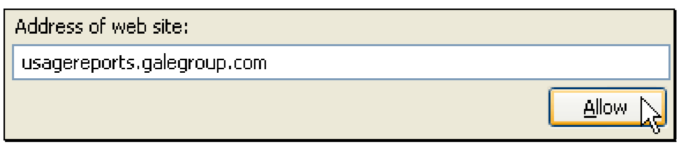
2. Click the **Content** icon.



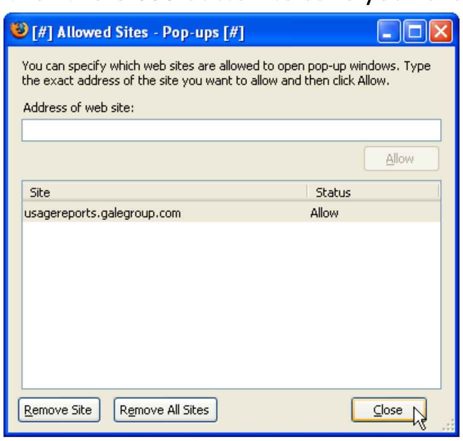
3. If **Block pop-up windows** is not checked, you don't have to do anything else and can click the **Cancel** button.

4. If **Block pop-up windows** is checked, click the **Exceptions** button.

5. In the **Address** box, enter the site **usagereports.galegroup.com** and click the **Allow** button.



6. Click the **Close** button to save your change.



7. Click **OK** to close the **Options** window.

Add-In Pop-Up Blockers

If you are using any pop up blockers (such as those included with popular add-ins like the Google or Yahoo toolbars), you will either need to disable them when you are on the Gale Usage portal, or set them to allow pop-ups for **usagereports.galegroup.com**.

Refer to your individual pop-up blocker's documentation or help for directions on how to do this.

Gale Usage Web Portal

System Availability

The Gale Usage web portal is available from 12:00 AM to 11:00 PM Eastern time, 7 days a week. Please do not log in to the system or schedule reports to run during the nightly maintenance window.

Update Schedule

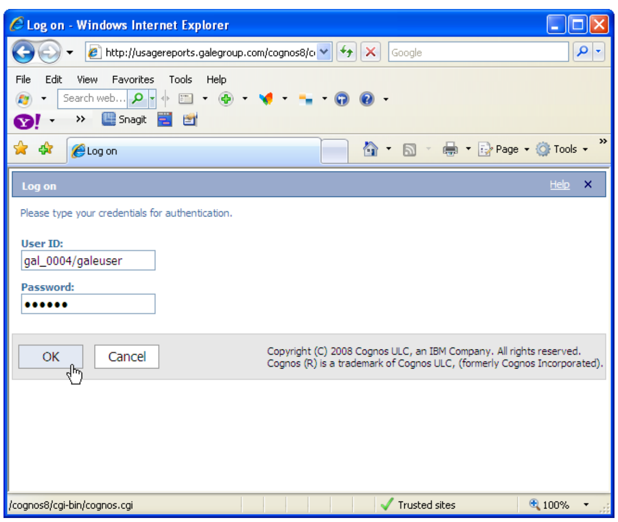
The portal is updated daily. Usage data is 3 days in arrears of the current calendar date.

Logging In

1. Using either Microsoft Internet Explorer or the Firefox browser, navigate to the address: http://usagereports.galegroup.com/cognos8

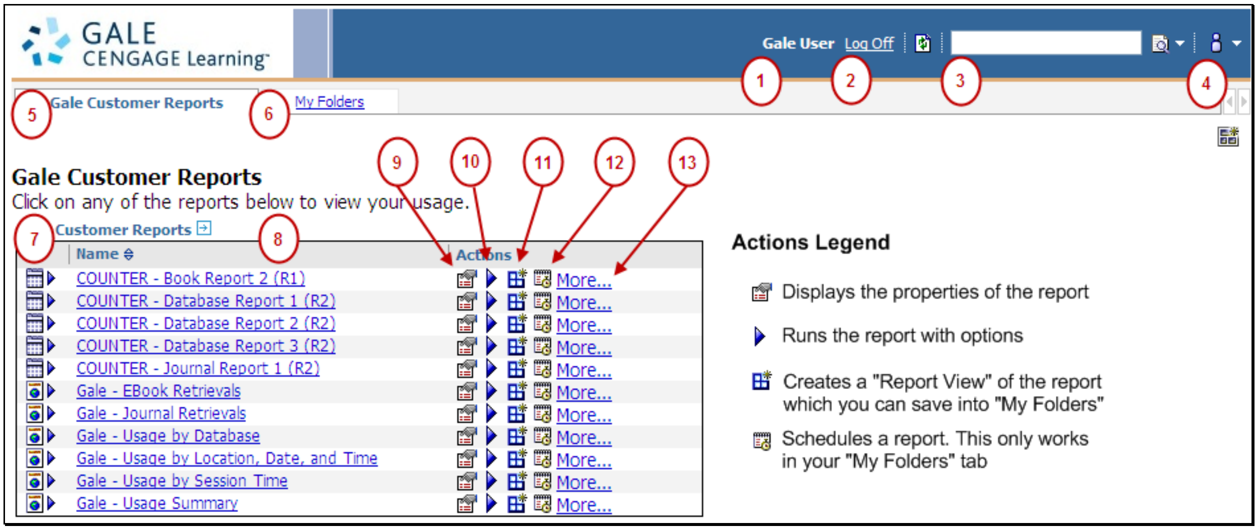
2. At the log on page, enter your portal User ID and Password and click the **OK**.

   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.

Elements of the Portal



1. **User Name**

   This value also appears in the headers of the standard reports. It also appears in the Counter reports when output as HTML, PDF, or Excel (not CSV or XML)

2. **Log Off**

   Click this ling to log off of the portal and prevent unauthorized access.

3. **Search**

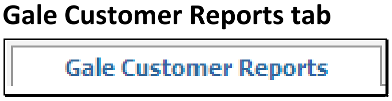
   Search for reports by name. Useful if you have a many report views saved in My Folders.

4. **User Menu**

   a. My Activities and Schedules
      Allows you to see reports you have scheduled as well as the status of reports that are running now or that have been run by you in the past.

5. **Gale Customer Reports tab**

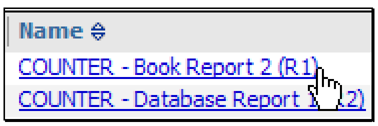
   This contains the standard reports that are available to you. You can make no changes to the reports in this tab.

6. **My Folders tab**

This contains any report views you have saved. These report views can have prompts saved and can be scheduled to run recurrently.

7. **Default output type**
   a.  - Reports with this icon are output as Microsoft Excel files.
   b.  - Reports with this icon are output as HTML, viewable in your web browser.

8. **Report Name**



   a. In the Gale Customer Reports tab, clicking on the name of the report will run the report.
   b. In the My Folders tab, clicking on the name of the report will open the last report you have saved. If you have no saved reports, it will run the report.

9. **Report Properties link**

Click on this link to view the properties of the report.
   a. In the Gale Customer Reports tab, you can make no changes to these properties.
   b. In the My folders tab, the properties can be changed.

10. **Run With Options link**

Click on this link to change the output format of the report before running it.

11. **Create a Report View link**

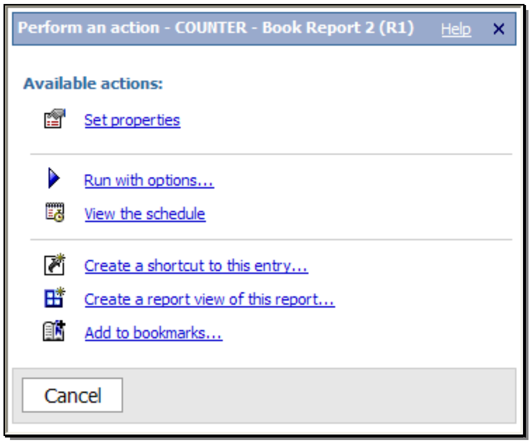
Click this link to create a report view which can be saved in My Folders.

12. **Schedule Report link**

   a. In the Gale Customer Reports tab, this link is disabled
   b. In the My Folders tab, this link allows you to schedule the report to be run later. Items in the My Folders tab can also be scheduled to run on a recurring basis.

13. **More options link**

This link opens a window allowing you to access additional options.



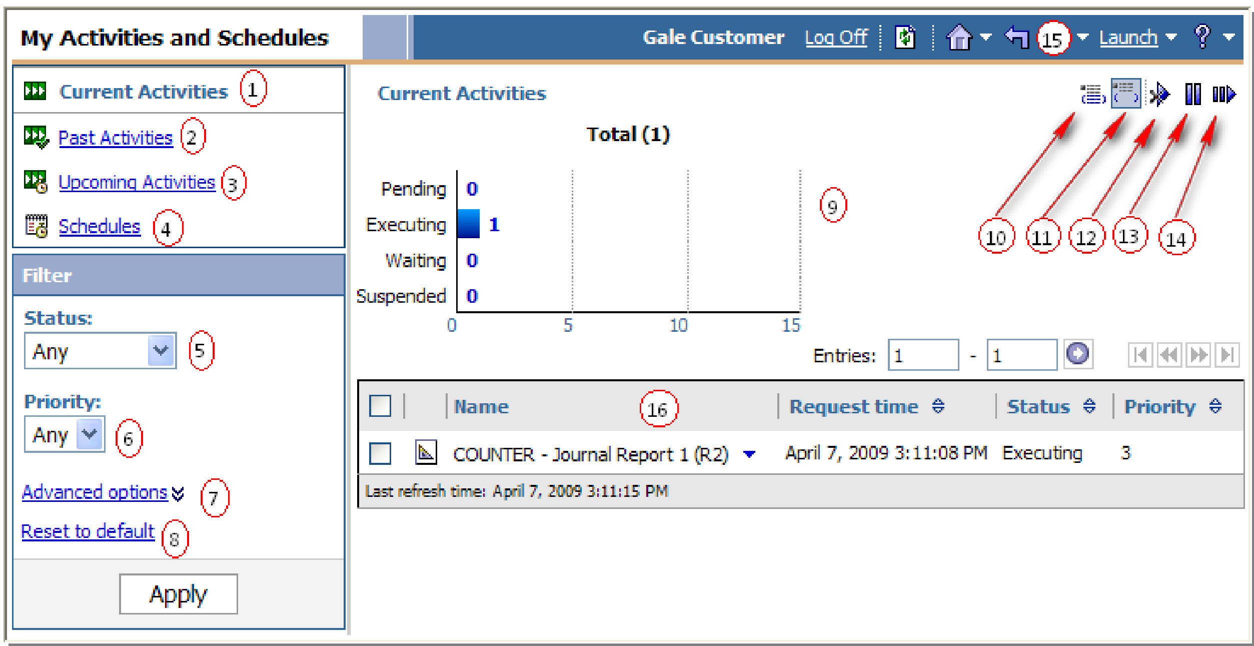
Most of the options in this window can also be accessed from icons in the portal as discussed above. There are two options that can only be accessed from this window:

a. *Create a shortcut to this entry*
   Similar to creating a Report View, except that it cannot contain any properties of its own, so it can't be scheduled, and prompts cannot be saved.
b. *Add to bookmarks*
   Allows you to save the report to the Bookmarks or Favorites of your web browser.

My Activities and Schedules

To view the history of reports you have run and the reports you have scheduled to run in the future, click on the **User Options** link and select **My Activities and Schedules** from the drop-down menu.

Elements of the My Activities and Schedules screen.



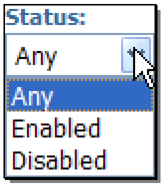
1. **Current Activities**
   Lists any reports that are running or queued to run. This does not include reports that were run interactively.

2. **Past Activities**
   Lists the history of reports that were previously run, excluding reports that were run interactively.

3. **Upcoming Activities**
   Lists the reports that are scheduled to run for any given day in the future.

4. **Schedules**
   Lists your scheduled reports and allows you to modify them.

5. **Status filter**



Allows you to filter the list by status. The available status values will vary depending on what you are viewing:

a. Current Activities
- Any
- Pending – Queued to run
- Executing – Currently running
- Waiting - Waiting for a process external to IBM Cognos 8 to complete
- Suspended – Manually put on hold

b. Past Activities
- Any
- Succeeded – Ran successfully
- Failed – Ran, but failed with an error
- Cancelled – Manually cancelled

c. Upcoming Activities
- Any
- Scheduled – Scheduled to run in the future
- Cancelled – Manually Cancelled

d. Schedules
- Any
- Enabled – Schedule is enabled
- Disabled – Schedule is disabled and will not run.

6. **Priority filter**
All of your reports should have a priority of 3, so this filter should always be left at its default.

7. **Advanced options**
This provides you with filter options that will be not be useful to you and should be ignored.

8. **Reset to default**
Click this link to reset all of the filters to their default values.

9. **Summary**
Lists a summary of the filtered objects in the list below. The values in this will vary depending on what you are viewing. The values will match those in the status filter above.

10. **Show details**

    Click this icon to show details in the list below.

11. **Hide details**

    Click this icon to hide details in the list below.

    The remaining icons in the tool bar may vary based on what you are viewing

12. **Cancel**

    Cancels all reports you have selected ( ) in the list below.

13. **Suspend**

    Suspends (puts on hold) all reports you have selected ( ) in the list below. Reports that are currently executing cannot be put on hold.

14. **Release**

    Releases any suspended reports you have selected ( ) in the list below.

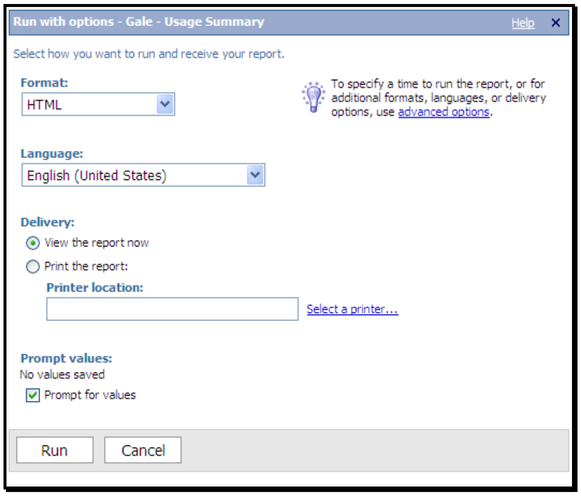
15. **Return**

    Returns you to the Gale Extranet portal.

16. **Report List**

    List reports based on your selections in the panes to the left. You can see additional options for each listed report by clicking on the Actions icon ( ) to the right of the report name.

Report Run Options



Format

- HTML – This is the default format for all of the Gale standard reports. The HTML format opens the report in your web browser and is best suited to short reports that you wish to view immediately.

  By default, reports that are run in HTML will show 100 lines of data per page and the pages can be navigated using the page navigation links at the bottom of the page (Top Page up Page down Bottom). The number of lines displayed per page can be modified by using Advanced Options.

- PDF – Reports run in PDF format must be viewed using the Adobe Acrobat PDF reader (or a compatible substitute). This is the recommended format if you intend to print the report.

- Excel 2007 – Reports generated in this format are compatible with Microsoft Excel version 2007 or higher. This format is best if you wish to add your own calculations to the report.

  Users with older versions of Excel can download a free conversion utility from Microsoft: http://office.microsoft.com/en-us/products/ha101686761033.aspx.

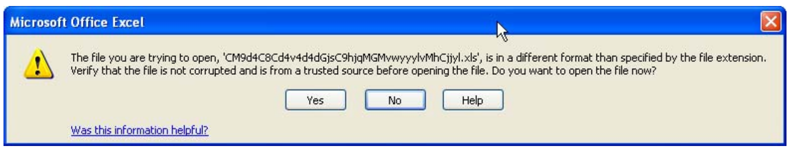
- Excel 2002 – Reports generated in this format can be opened in Microsoft Excel versions 2002 and higher (including Excel 2007) as well as Microsoft Internet Explorer. This does not actually generate an Excel spreadsheet because of the potential for files in the older Excel format to be infected with macro viruses. The actual format of the generated file is MHTML.

  When running the report interactively, the MHTML file is saved with an extension of ".xls" so that Microsoft Excel will open the report by default. However, many email systems will block files with the ".xls" extension, so if the report is emailed, the file will be delivered with an ".mht" extension.

Issues with the Excel 2002 (MHTML) format.

- How to open an MHTML file in Excel:
  By default, Windows will open files with an extension of ".mht" in Internet Explorer. Once the file is open in IE, simply select **File -> Save as** and save the file as a Microsoft Excel Workbook. You can then open the saved file in Excel.

- If the MHTML file name ends with an ".xls" extension (by running the report interactively or by renaming the file manually) and you try to open it in Excel, some versions of Excel may give you a warning similar to this one:

  This is to advise you that the MHTML file has an extension that doesn't match the format. If you get this warning, simply click the **Yes** button.

- CSV – Comma Separated Values. This format delivers your report as a plain text file with a comma between each value.

  Unlike HTML, PDF, and Excel formats, CSV files contain the data without report headers and footers. CSV format is best suited when you wish to open it in a spreadsheet other than Microsoft Excel.

  Note: CSV format is not available for the Usage Summary report

- XML – Short for eXtensible Markup Language, this is a text file with XML tags to identify each value.

  Unlike the CSV format, XML files contain the data without report headers and footers. Please note that COUNTER reports saved in XML format **do not** comply with recently adopted COUNTER standards for XML reports.

  Note: XML format is not available for the Usage Summary report

Language

This feature is not currently being used. All reports are generated in English only.

Delivery

- View the report now
  - If the format you selected is HTML or PDF, the report will be displayed in a browser window.

    - All other formats (Excel 2007, Excel 2002, CSV, and XML) will allow you to save the file to your hard drive.

- Print the Report
  This feature is not enabled. If you wish to print the report, select PDF format and then print the report from your PDF viewer.

Prompt Values

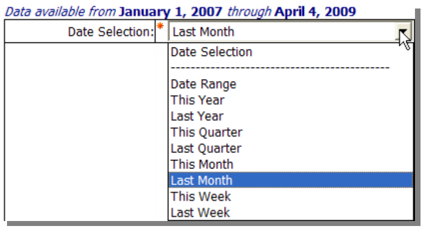
If **No values saved** is displayed (as will always be the case when running a report from the **Gale Customer Reports** tab), you must leave this box checked. If you try to run the report without specifying the report prompts, the report will not run correctly.

If there are prompt values saved (which can only happen for report views in your **My Folders** tab), you can uncheck this box to use the saved prompts, or check this box to run the report with new prompt values.

Common Report Prompts

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

Date Selection prompt



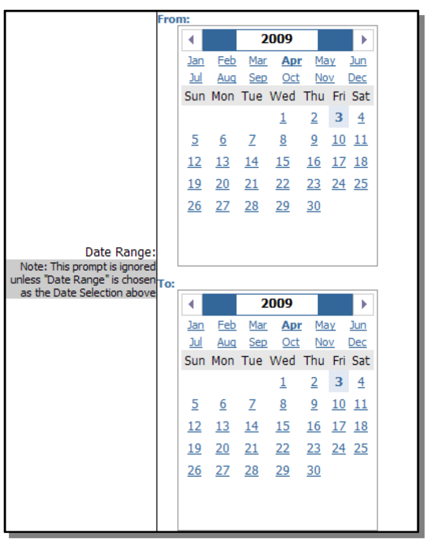
This allows you to run the report for a relative date range (ex: all of **Last Month**), or you can select **Date Range** which allows you to use the **Date Range** prompt to select a specific date range.

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).

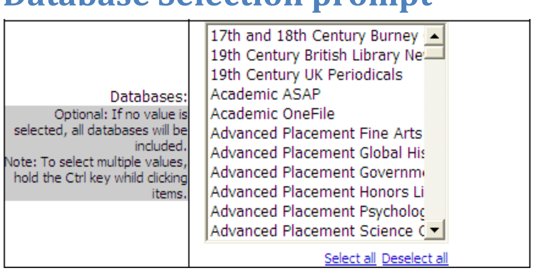
If your date selection falls outside of this date range, you will see a warning in the report header. This warning is only available when the report format is HTML, PDF, Excel 2007, or Excel 2002 (i.e. not CSV or XML).

Date Range prompt



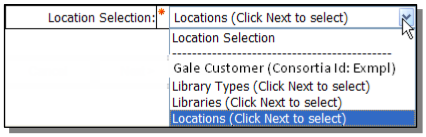
This prompt is only used when **Date Range** is selected in the **Date Selection** prompt. If any of the relative dates are selected in that prompt, the **Date Range** prompt is ignored.

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”).

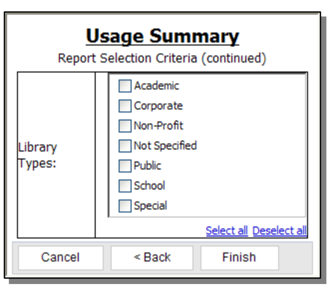
If this first option is selected, you do not need to go to the second prompt screen.

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



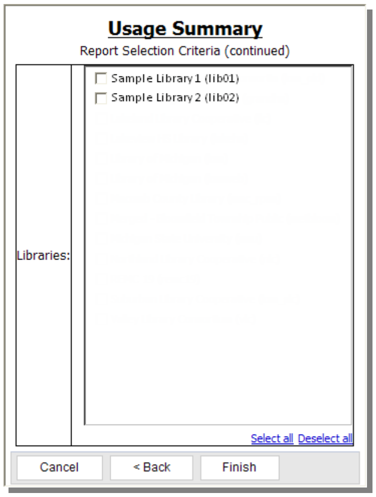
If you selected Library Types in the Location Selection prompt (and clicked **Next**), you will be presented with the Library Types prompt.
Note: this prompt is not available for the Counter reports.

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



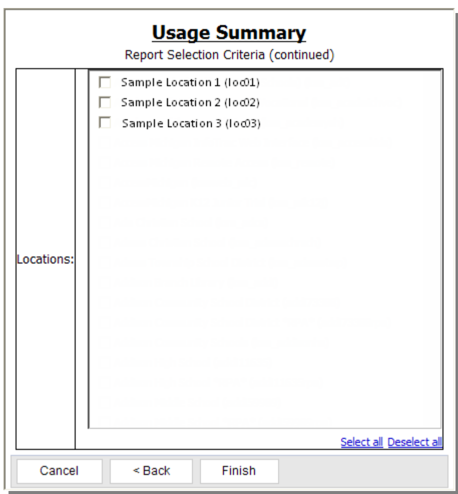
If you selected *Libraries* in the Location Selection prompt (and clicked **Next**), you will be presented with the Libraries prompt.

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



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.

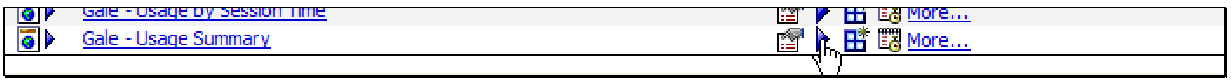
Some reports will allow you to select multiple values. If the options are listed with check-boxes (), you can select any values you need. If the options have radio buttons () next to them**,** you will only be able to select a single value.

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

Common Tasks

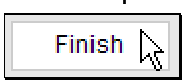
How to Run a Report (One Time)

1. Locate the desired report in the portal.
   (We'll use the Usage Summary report as an example)

2. Click the report's **Run with Options** button ()
   

3. Specify the desired format and prompt options.
   (See **Report Run Options**)

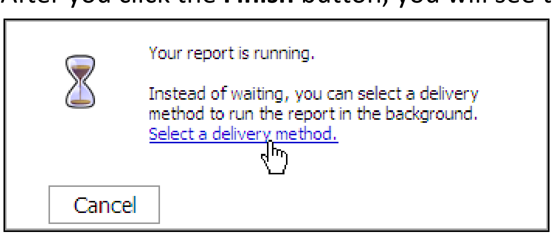
4. Click the **Run** button to launch the report viewer.
   

5. If you are running the report using saved prompts, the report will begin running immediately. If you selected the option to **Prompt for values**, you will be presented with the prompt screen. (See **Common Report Prompts**).
   After completing the appropriate prompts, click the **Finish** button to start running the report.
   

How to E-mail a Report (One Time)

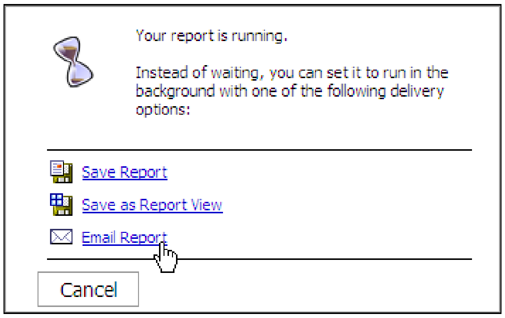
Some large reports may take several minutes to run. Instead of waiting for them to display in the interactive window, you may choose to have these reports run in the background and the portal will deliver them to you by e-mail when they are complete.

1. Locate the desired report in the portal and run it according to the steps in **How to Run a Report**.

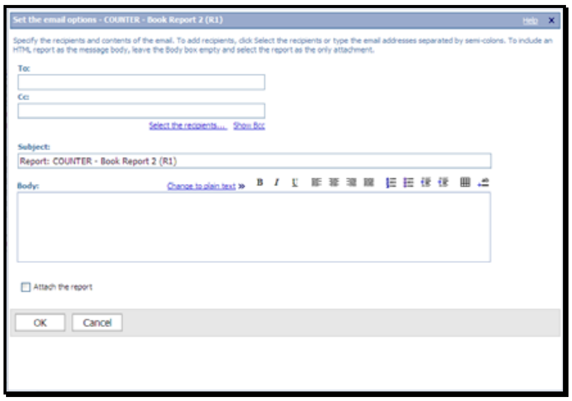
2. After you click the **Finish** button, you will see the following status message:
   

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

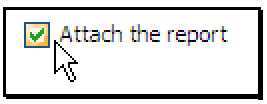
4. You will be prompted to select a delivery method. Click the **E-mail Report** link.



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.

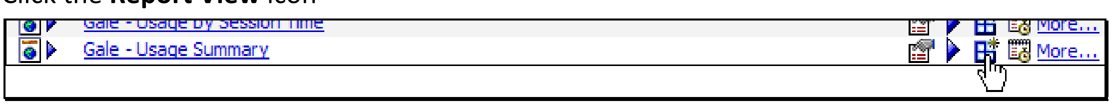


7. Click the **OK** button to return to the main window.

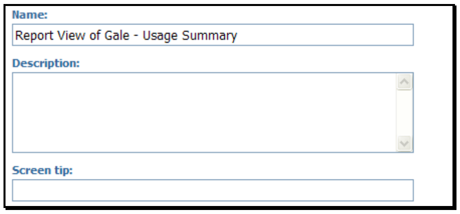
How to Create a Report View

1. Locate the desired report in the portal.
   (We'll use the Usage Summary report as an example)

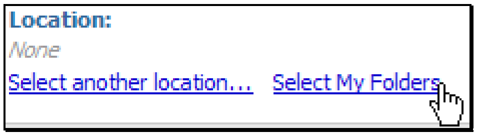
2. Click the **Report View** icon



3. Give the report view a meaningful name. You may also give it a description and a screen tip if desired.



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



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

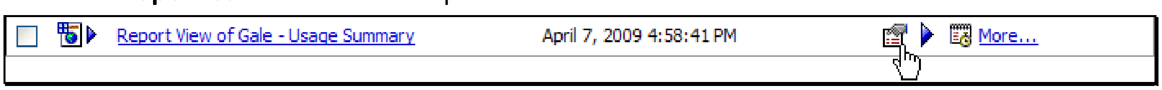
5. Click the Finish button to save the report view

How to Save Prompts in a Report View

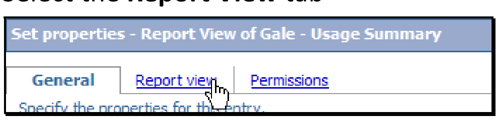
1. If you haven't already done so, first create a report view of the desired report. (See **How to Create a Report View**)

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)

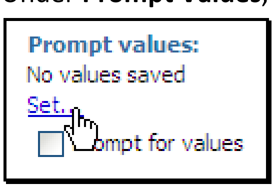
3. Click the **Properties** button for the report view.



4. Select the **Report View** tab



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



6. Set the prompts to the desired values (See **Common Report Prompts**)

7. Click the **Finish** button to return to the report view properties page.

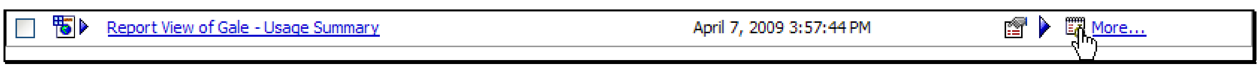
8. Click the **OK** button to save your changes.

How to Schedule a Report to Run Recurrently

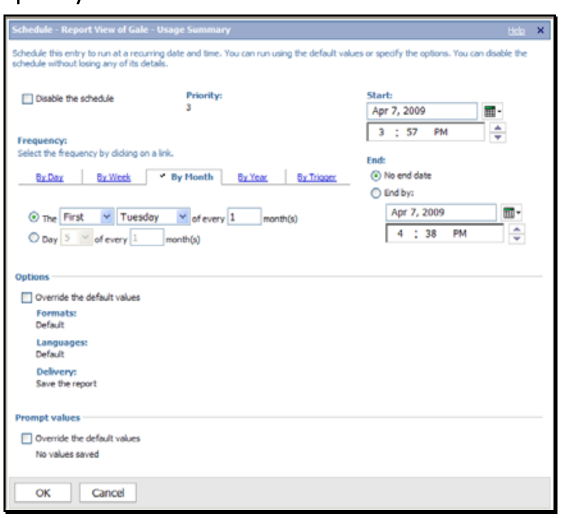
1. If you haven't already done so, first, create a report view of the desired report.
   (See **[How to Create a Report View]**)
   Note: If you want multiple schedules for a given report, you'll need to create a separate report view for each schedule.

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 **Schedule** icon.



4. Specify the details of the schedule

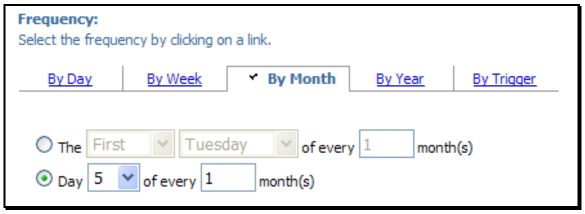


   a. **Disable the schedule** – Select this if you wish to define the schedule, but not let it run yet.

   b. **Start** – The schedule will not begin until after this date

   c. **End** – The schedule will stop running after this date

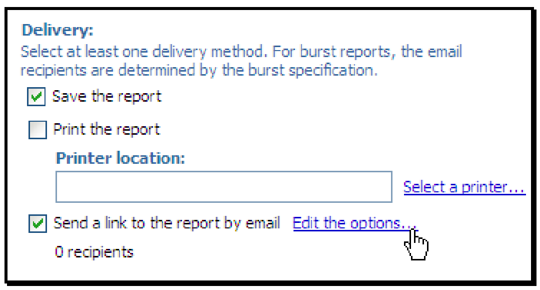
d. **Frequency** – Select the frequency with which you want the report to be run. For example, if you want the report to run on the 5th of each month, you would set the frequency of the schedule like this:



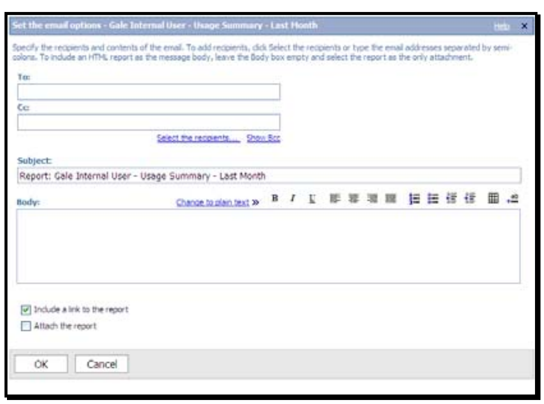
e. **Options** – Click **Override the default values** if you would like to change the output format (see **Format**) or set up e-mail delivery for the scheduled report.

E-mail Delivery

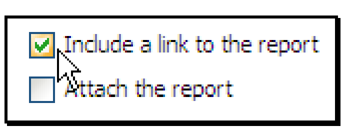
i. Check **Send a link to the report by email** and click **Edit the options …**



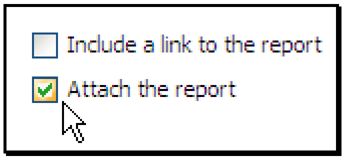
ii. Enter your e-mail address (you may specify multiple addresses in the To: and CC: lines). You may also edit the Subject line and add text to the main body of the message.



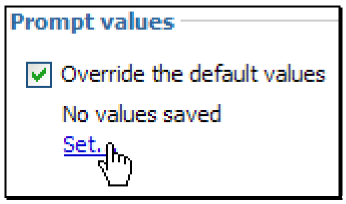
iii. By default, the e-mail will contain a link to your report. Clicking the link will open the report in your Web browser.



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

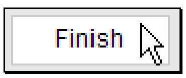


f. **Prompt values** - If you have saved prompt values in the report view, you can leave the **Override the default values box** unchecked to use the saved prompts. Otherwise, you must check this box and click the **Set** link to set the prompt values for this schedule.



(See **Common Report Prompts**)

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