SirsiDynix Symphony 3.2.1 Web Reporter

Web Essentials Guide

September 2008

This document is compatible with Web Reporter 3.2.1. Information in this document may also be compatible with later versions.

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Contents

About this guide

This *Web Essentials Guide* explains how to use the Web Reporter Web interface to report on library data. It explains how to access the software, configure various views of data, and view reports. It also explains how to work with report data to create new reports and charts.

This guide is intended for library staff who work with reports and for system administrators who must understand and support basic features of the software. The guide assumes that you have a general knowledge of library data.

Setup and administration topics are not covered in this guide.

For more information about this guide, see these topics:

- **Summary of contents** on page v
- **Conventions used in this guide** on page vi
- **Software basics** on page viii
- **Possible differences between the software and this guide** on page viii
- **Documentation updates** on page ix
- **Comments and suggestions** on page ix

Summary of contents

This guide contains these major sections:

Conventions used in this guide

This guide uses terms, typefaces, and symbols to denote different kinds of information. Understanding these conventions can help you recognize the information you need more quickly.

Symbols

This guide uses these symbols:

Symbol	Description
	**Tip** This symbol indicates additional notes or helpful tips.
	**Important** This symbol indicates important information or warnings.

Mouse conventions

The following terms are used in this guide to describe actions you do with a mouse.

Term	Definition
Click	To place the mouse pointer on an icon, command, or button and quickly press and release the primary (usually the left) button once.
Double-click	To place the mouse pointer on an icon, command, or button and quickly press and release the primary mouse button twice.
Right-click	To place the mouse pointer on an icon, command, or button and quickly press and release the secondary (usually the right) button.
Drag	To press and hold the primary mouse button while moving the mouse.

Term	Definition
Choose	To click a button or an option from a menu, group of options, or list.
Select	To click once on an option in a list so that the option is highlighted. In a field, you may drag the mouse over text to select that text.

Keyboard conventions

This guide refers to keys following the standard convention of 101-key keyboards. For example, Ctrl is the control key, Alt is the alternate key, Enter is enter or return.

When you need to press two or more keys at the same time to do an action, the keys are connected with a plus sign (+). For example, **Alt+H** means to press and hold the **Alt** key while you also press **H**.

Keys you press appear in bold type in steps. Text or numbers that you need to enter using the keyboard also appear in bold (for example, “Type **main** in the **Location** field”).

Other conventions

In step-by-step instructions, the names of menus, buttons, fields, and other options appear in bold type (for example, “the **OK** button” or“the **Title** field”).

When you are instructed to choose an option from a menu, the menu and menu options are separated by the greater-than symbol (>). For example, “choose File > Save” means to choose the File menu then choose the Save option from the menu. This convention is also used to show the sequence of items you use to open a report or feature in the software.

Text in italics shows general information that you must replace with information that is specific to your system. For example, you would replace *password* with a specific password, such as **123gr@ndma**.

File and directory names, code examples, and computer output appear in `Courier`.

Software basics

This guide assumes that you have a basic knowledge of your workstation operating system and of working with software that presents information in a Web browser. At a minimum, you should know how to:

- Use a mouse or keyboard to do basic tasks, such as choosing menu options and buttons.
- Work with windows (selecting, moving, minimizing, restoring, maximizing, sizing, scrolling, closing, and so on).
- Work with dialog boxes.
- Log in to the software, change operators, and log off the software.
- Work in software list and edit windows.

If you do not know how to do these tasks, refer to the documentation for your workstation operating system and your Web browser.

Possible differences between the software and this guide

The names, labels, and sample windows in this guide reflect the default settings that are delivered with most new installations. The settings on your system may be different from these defaults, depending on your library's implementation choices and the way your system administrator sets up your system. (For example, your system administrator can change report names, reorganize the items that display in Shared Reports, and set up security to limit access to certain features.)

Additionally, as you use the software, you can resize windows or customize your workspace. Consequently, your software environment may look and function differently than the environment described in the tasks in this guide.

Documentation updates

Updates to this guide are posted to the customer support website between releases, as necessary. These updates provide corrections to unclear, incorrect, or incomplete information. They also provide documentation for enhancements that were not complete at the time the guide was first published.

You may access the customer support website at http://clientcare.sirsidynix.com.

The customer support website requires a user name and password. If you do not already have a user name and password, contact your system administrator to receive one.

Comments and suggestions

SirsiDynix welcomes and appreciates your comments on its documentation. We want to know what you think about our manuals and how we can make them better. If you have comments about this guide, please send them to docs@sirsidynix.com.

Be sure to include the title and version number of the guide and tell how you used it. Then tell us your feelings about its strengths and weaknesses and any recommendations for improvements.

Chapter 1: Using Web Reporter HTML Help

The HTML *Web Essentials Guide* for Web Reporter provides instructions and reference information to help you make the most of the software. For an overview of the content and conventions in this guide, see **About this guide** on page v.

You can access the help in one of several ways described in **Learning about Web Reporter** on page 22.

Once the help is open, you can find help topics by using the Contents, Index, and Search features. You can move back and forth between help topics by using the browse buttons or by following links. Once you've found the help you need, you can print or bookmark topics for later reference.

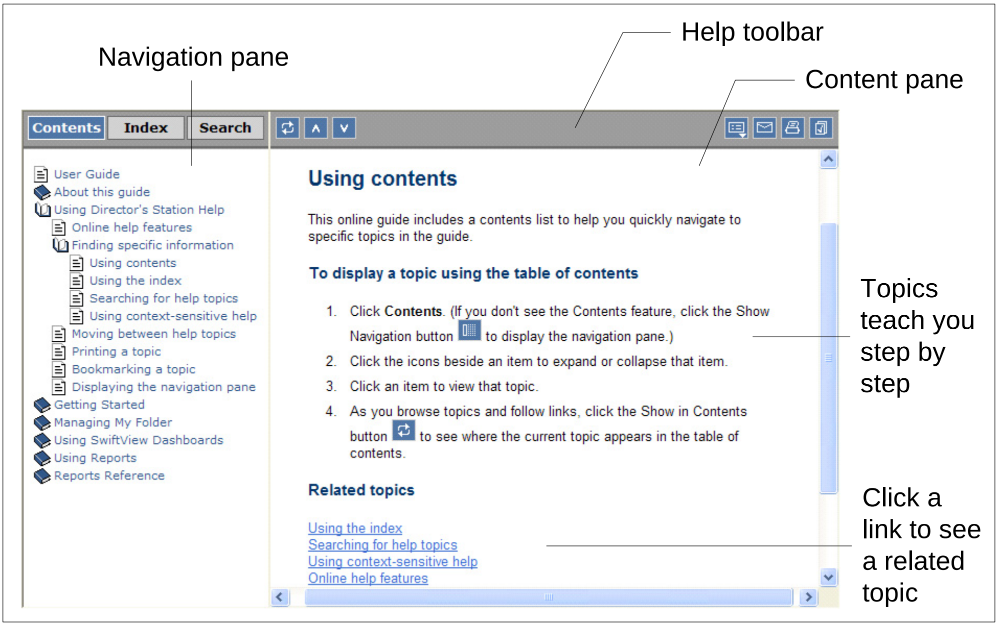
For more information, see these topics:

- **HTML help features** on page 1
- **Finding specific information** on page 4
- **Moving between help topics** on page 6
- **Printing a topic** on page 7
- **Bookmarking a topic** on page 7

HTML help features

The guide is designed to help you find what you need quickly. Topics are brief and include references to related topics if you want to learn more.

Each topic displays in a content pane with a toolbar at the top for additional help features. A navigation pane lets you browse the contents of the guide, find topics using the index, or search for specific information.



Toolbar

The help toolbar includes these buttons.

Button	Description
	**Next** Displays the next topic in contents order. This button is inactive when you are viewing the last topic in the guide.
	**Previous** Displays the previous topic in contents order. This button is inactive when you are viewing the first topic in the guide.
	**Show in Contents** As you browse topics or follow links, this button lets you find the current topic in the contents. This button does not appear if the navigation pane is hidden.

Button	Description
	**Show Navigation** Opens the navigation pane. This button only appears if the navigation pane is hidden.
	**Related Topics** Displays links to topics related to the current topic. Related topics also appear at the end of most help topics. This button is inactive if the current topic does not have any related topics.
	**Email** Lets you send comments about a topic to SirsiDynix. This feature uses the email agent associated with the “mailto” protocol on your operating system.
	**Print** Prints the current topic, without the toolbar or navigation pane.
	**Bookmark** Lets you bookmark the current topic in Firefox. This button is not supported in Internet Explorer (see **Bookmarking a topic** on page 7 for an alternative).

Navigation Pane

The navigation pane lets you quickly locate help topics using Contents, Index, or Search. For details, see **Finding specific information** on page 4.

Depending on how you access the guide, the navigation pane may be hidden. If it’s hidden, you can simply click the Show Navigation button  to display the navigation pane.

Related topics

- **Finding specific information** on page 4
- **Moving between help topics** on page 6
- **Printing a topic** on page 7
- **Bookmarking a topic** on page 7
- **Displaying the navigation pane** on page 8

Finding specific information

Use Contents, Index, or Search to find specific information. You can also open specific topics using context options in the software.

For details, see these topics:

- **Using contents** on page 4
- **Using the index** on page 4
- **Searching for help topics** on page 5

Using contents

The HTML guide includes a contents list to help you quickly navigate to specific topics in the guide.

To display a topic using the table of contents

1 Click **Contents**. (If you don’t see the Contents feature, click the Show Navigation button to display the navigation pane.)

2 Click the icons beside an item to expand or collapse that item.

3 Click an item to view that topic.

4 As you browse topics and follow links, click the **Show in Contents** button to see where the current topic appears in the table of contents.

Related topics

- **Using the index** on page 4
- **Searching for help topics** on page 5
- **HTML help features** on page 1

Using the index

The index in the HTML guide is very like an index in a book.

To find information using the index

1. Click **Index**. (If you don't see the Index feature, click the Show Navigation button to display the navigation pane.)

   The software displays the index with index groups at the top for quick access.

2. Click an index group to view that group of terms. For example, click **M** to view the words in the index that begin with the letter "M".

3. Click an index term to view the topic or topics for that term.

4. If more than one topic fits that term, the software displays a list of matching topics. Click an item in the list to view the topic.

Related topics

- **Using contents** on page 4
- **Searching for help topics** on page 5
- **HTML help features** on page 1

Searching for help topics

If you can't find what you need using the contents or index, you can search for words using the Search feature.

The Search feature of the HTML guide returns results ranked by relevance. The ranking considers frequency (the number of times the words appear in a topic), proximity (how close the words are, when you use more than one word), and importance (if the words appear in topic headings, for example).

When you enter more than one word, all the words you enter must appear in a topic to be considered a match. If you don't get any results, try removing some words.

Common words (such as "and", "for", "that", and so on) are ignored when you search.

To search for help topics

1. Click **Search**. (If you don't see the Search feature, click the Show Navigation button to display the navigation pane.)
2. Enter one or more words to search for.
3. Choose **Go**.

   The software returns a relevance-ranked list of topics matching the words you entered.
4. Click an item in the list to view that topic.

Related topics

- **Using contents** on page 4
- **Using the index** on page 4
- **HTML help features** on page 1

Moving between help topics

You can move from one topic to another by using the browse buttons in the toolbar or by clicking on links you see.

As you browse topics and follow links, click the Show in Contents button to see where the current topic appears in the table of contents. If you don't see the Contents feature, click the Show Navigation button to display the navigation pane.

To move to the next or previous topic in sequence

1. To display the next topic in the guide, click the Next button in the toolbar.
2. To display the previous topic in the guide, click the Previous button in the toolbar.

To display linked topics

1. Click a linked topic.

2 Right-click and choose **Back** or use your browser's **Back** button to return to a topic you were viewing before following a link.

Related topics

- **HTML help features** on page 1
- **Finding specific information** on page 4
- **Printing a topic** on page 7
- **Bookmarking a topic** on page 7
- **Displaying the navigation pane** on page 8

Printing a topic

The Print option lets you print the current topic, without printing the toolbar and navigation pane.

To print a single topic

1 Open the topic you want to print.

2 Click the Print button in the toolbar.

Related topics

- **HTML help features** on page 1
- **Finding specific information** on page 4
- **Bookmarking a topic** on page 7

Bookmarking a topic

If there is a particular topic that you refer to often, you can bookmark it for quick reference.

To bookmark a topic in Firefox

1 Locate the topic you want to bookmark.

2 With the topic displayed, click the Bookmark button in the help toolbar.

The software displays a new window with a link for this topic.

3. Right-click the link and choose **Bookmark This Link** from the menu that appears.
4. If you want to, specify a location for the bookmark.
5. Choose **OK**.

To bookmark a topic in Internet Explorer

1. Locate the topic you want to bookmark.
2. With the topic displayed, right-click anywhere in the content pane (see **HTML help features** on page 1).
3. Choose **Add to Favorites** from the menu that appears.
4. If you want to, specify a location for the bookmark.
5. Choose **OK**.

Related topics

- **HTML help features** on page 1
- **Finding specific information** on page 4
- **Printing a topic** on page 7

Displaying the navigation pane

Depending on how you open the HTML guide, the navigation pane may be hidden. When the navigation pane is hidden, you will see the Show Navigation button in the help toolbar in place of the Show in Contents button .

To display the navigation pane.

➢ Click the Show Navigation button .

Related topics

- **HTML help features** on page 1
- **Finding specific information** on page 4
- **Moving between help topics** on page 6

Chapter 2: Getting Started

Welcome to Web Reporter, a full-featured business intelligence tool that helps you take advantage of data in your integrated library system without the need to be an SQL programmer.

Web Reporter includes a set of base reports to let you view and analyze your data in different ways. From these reports, you can create other reports and dashboards to provide quick access to the information that is most important to you.

Web Reporter features a Web interface that let's you create and run reports from a standard Web browser. (A desktop client is also available for Desktop Professional users. For information about the Desktop application, refer to the MicroStrategy manuals installed with the Desktop software. See **Learning about Web Reporter** on page 22.)

To get started, choose one of these topics:

Using Web Reporter

Web Reporter is a Web-based software tool you can use from anywhere that you have access to the World Wide Web. Your system administrator will provide you with the URL to access Web Reporter for your library.

Please be aware of these minimum requirements:

- Microsoft Internet Explorer 6.0 or later

- Firefox 2.0 or later
- 800 x 600 minimum screen resolution (1024 x 768 or higher recommended)
- Adobe Reader for printing and viewing PDF reports

As a Web application, Web Reporter uses JavaScript, popups, and cookies for many features. If JavaScript, popups, or cookies are disabled or unsupported in your browser, some features will not work.

Some features of Web Reporter depend on privileges assigned to your user account, your user license level, and what optional software services are available to you (OLAP Services, for example). Because of this, you may not have access to some features described in this guide. Also, you may see different graphs or reports that display different data than other users see.

If you need help logging in or have questions about access, contact your system administrator.

To learn more about Web Reporter, choose one of these topics:

- **Using Web Reporter HTML Help** on page 1
- **About Web Reporter** on page 12
- **Learning about Web Reporter** on page 22
- **Logging in** on page 23
- **Logging out** on page 25
- **Getting around in Web Reporter** on page 26
- **Changing your password** on page 25

About Web Reporter

Web Reporter is a business intelligence tool that helps you analyze and report on your library data. Based on the MicroStrategy Business Intelligence Platform, Web Reporter is very powerful yet easy to use. You don't have to be an expert with SQL or database technologies. A simple interface lets you filter, sort, and run reports as easily as answering a few prompts. Depending on your user level, you may also be able to cross tabulate and pivot your data in different ways, in the end building graphs and reports that reveal and illustrate key measures important to your organization. You can then export these results for further analysis or share them with others in PDF.

As you work with Web Reporter and use this guide, it will be helpful to understand these topics:

- **Web Reporter user levels** on page 13
- **Web Reporter architecture overview** on page 16
- **Web Reporter Web interface** on page 18
- **Terms** on page 20

Web Reporter user levels

Each user in your organization that uses Web Reporter must have a separate license. You purchase Web Reporter licenses depending on the level of functionality needed. Licenses are available for these user levels.

- Web Reporter
- Web Analyst
- Web Professional
- Desktop Designer

Each license adds functionality. For example, the Web Analyst can typically do all that the Web Reporter can do and more; the Web Professional can do all that both Web Reporter and Web Analyst can do.

Here is a brief description of each user level.

Web Reporter

The Web Reporter user has the least functionality and is intended for light use. A Web Reporter license allows users to run and view existing reports, answering any prompts defined for the report to select or filter data, for example. After running the report, a Web Reporter user can sort data, drill to see additional information (if available), print the report, or export report data for use in another application. Web Reporter users can also schedule reports to run according to schedules defined by a system administrator.

Web Reporter users cannot create reports except by using prompts and report builders already provided by other report designers. They also cannot save reports.

Web Analyst

The Web Analyst license is appropriate for a medium user. In addition to the functionality of the Web Reporter license, this license allows users to change the way data displays on a report including swapping rows and columns (pivoting) and changing the order of columns. Web Analyst users can also add and format metrics.

Web Analyst users who are also licensed to use OLAP Services (a separate purchase) can use view filters and hide or show specific report objects to focus on the most significant data in a report.

After creating customized reports, Web Analyst users can save the results. When saving, you can choose to keep the answers you specified for prompts or prompt again when you run the newly customized report.

Web Analysts cannot change the look of a report grid (advanced formatting options such as fonts, alignment, colors, or borders, for example), and they cannot use objects that are not already part of a report.

Web Professional

The Web Professional license is for super users. This license includes all the features of the Web Reporter and Web Analyst licenses and allows users to create reports from scratch or modify existing reports in design mode. Web Professional users can add and remove objects, customize grid format, and create and save filters.

Desktop Designer

Some reporting features are only available though the MicroStrategy Desktop application, not the Web client. For these features, you need a Desktop Designer license (also known as Desktop Professional). Features that require Desktop Designer include creating drill maps and configuring drilling; creating and saving prompts and adding them to reports; creating metrics, thresholds, and custom groups; and defining banding and autostyles.

Since these features are not available in the Web interface, they are not covered in this *Web Essentials Guide*. Instead, refer to the MicroStrategy documentation that is installed with the Desktop application (see **Learning about Web Reporter** on page 22). Everything you can do in the Web client, you can also do in the Desktop client.

Related topics

- **Web Reporter architecture overview** on page 16
- **Web Reporter Web interface** on page 18
- **Terms** on page 20
- **Learning about Web Reporter** on page 22
- **Basic User Tasks** on page 37

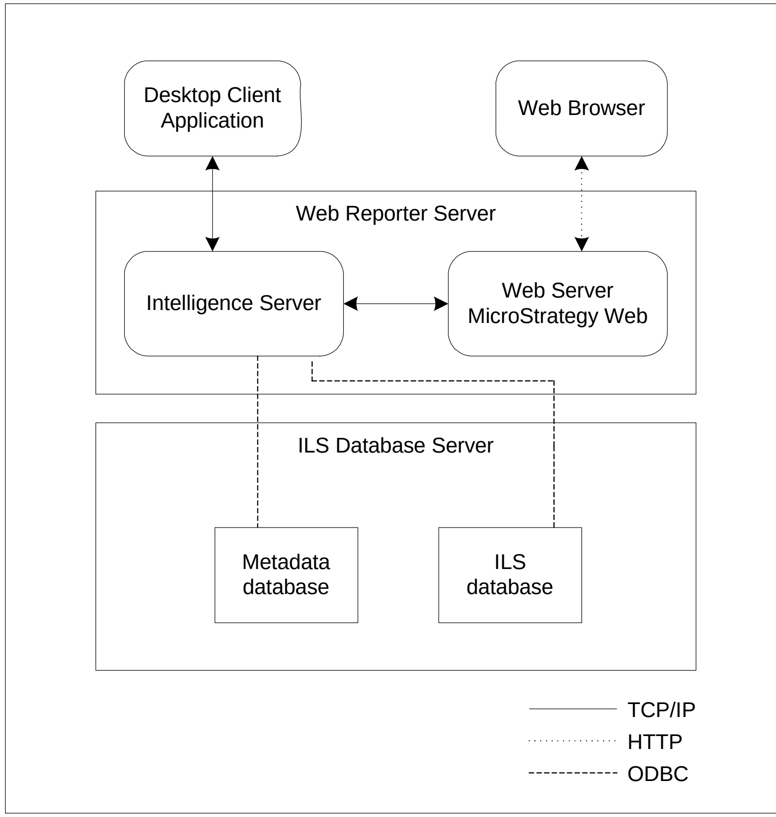
Web Reporter architecture overview

Web Reporter is a suite of modules based on the MicroStrategy Business Intelligence Platform. It consists of an Intelligence Server that uses metadata about your ILS (integrated library system) database to gather information, a Web server that allows you to view and edit reports from a Web browser, and a Desktop client used for administration and report design tasks not available through the Web interface.

MicroStrategy Web and Intelligence Server software are typically installed on a single Web Reporter server apart from the ILS database server. The Desktop client is also included on the Web Reporter server, but a system administrator may choose to install Desktop on additional administrator workstations as needed. A Desktop Designer license is required for each Desktop user (see **Web Reporter user levels** on page 13).

Figure 2-1 illustrates the relationships between components.

Figure 2-1: Web Reporter architecture



MicroStrategy Intelligence Server is at the core of Web Reporter. It provides security, data caching, and analytical capabilities beyond the ILS database. The Intelligence Server uses ODBC (open database connectivity) to connect to two databases used for reporting. One is the ILS database that holds your library data. The other is a metadata database.

The metadata database provides the Intelligence Server with information about your ILS database and information about the reports and report objects you can work with. It also includes Web Reporter configuration data, such as security policies, user data, and project information, for example.

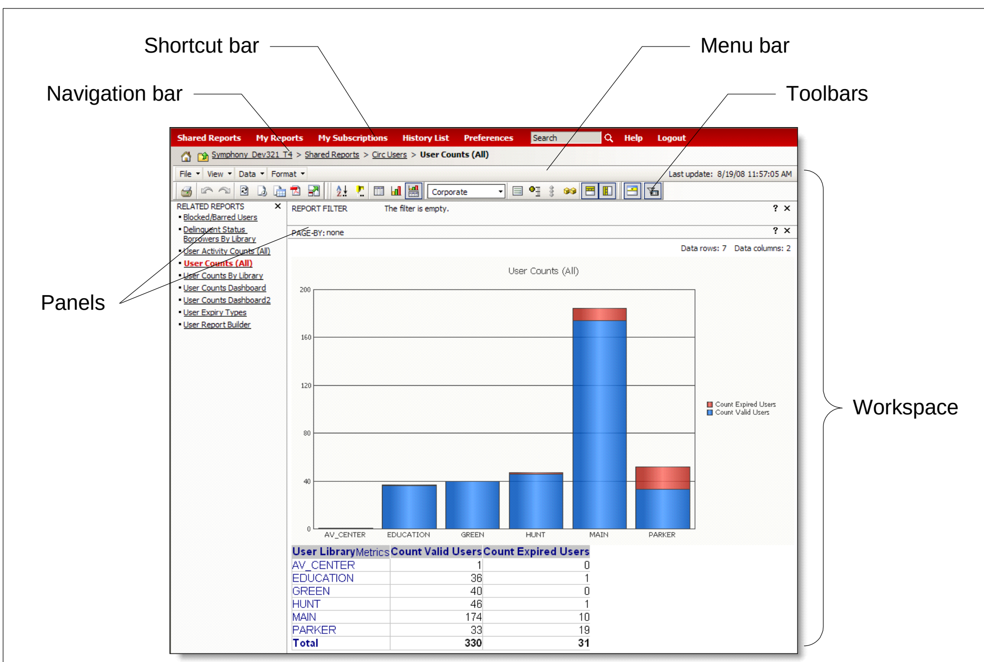
When you create or run reports, Intelligence Server uses this metadata to translate your requests into SQL queries for the ILS database and then translates the results into the report objects and documents you work with in the Web or Desktop clients.

Related topics

- **Web Reporter user levels** on page 13
- **Web Reporter Web interface** on page 18
- **Terms** on page 20
- **Learning about Web Reporter** on page 22

Web Reporter Web interface

Here is a sample of the Web Reporter interface with a description of some of the key features referred to in this guide.



Shortcut bar

The shortcut bar lets you quickly access various features such as subscriptions, shared reports, and preferences. You can also start a search from the shortcut bar. For more information, see **Shortcut bar** on page 27.

Navigation bar

The navigation bar displays below the shortcut bar. It shows the path you've followed in the software or the folder path for the current report. For more information, see **Navigation bar** on page 28.

Workspace

The workspace displays the feature you are currently using, for example, a report, a folder, a dashboard, or administrative forms.

In general, there are two types of workspace. The *project workspace* displays different folder pages for finding and opening reports, such as project home, project summary, report groups (folders), and reports lists. The *reports workspace* includes a menu bar, toolbars, and various panels for working with reports or documents.

Menu bar

The menu bar displays when you are working with a report or document in the reports workspace. It lists the options available based on your user level. Many of these options also appear as buttons on the various toolbars.

Toolbars

Toolbars in the reports workspace display commonly used options for quick access. The buttons and toolbars that display depend on your user level and on what you can do with the current report.

Panels

Panels organize and display different kinds of information for quick reference. Panels let you interact with the software in different ways. You can learn more about a panel by clicking its Help button (a question mark). To hide a panel, click its Close button. If you close a panel, you can open it again by choosing it from the View menu.

Related topics

- **Web Reporter user levels** on page 13
- **Terms** on page 20
- **Learning about Web Reporter** on page 22

Terms

As you use Web Reporter, it will be helpful to understand these terms.

business intelligence

Business intelligence (BI) refers to technologies, applications, and practices for collecting, integrating, analyzing, and presenting key data that support better business decision making. Web Reporter is a business intelligence tool.

OLAP

Online Analytical Processing. OLAP is an approach to providing quick access to various multidimensional views of data without the need to make schema changes.

In Web Reporter, OLAP Services is an optional service.

schema

A schema defines the tables, fields, and relationships within a relational database.

fact

Facts represent columns with numeric data in Web Reporter. They are the basis of metrics (calculations), for example, the number of checkouts or the price of an item.

metric

A metric is a calculation on a fact, for example, a sum of fines, a count of users of a given type, or the number of days an item is overdue.

attribute

In many cases, attributes are simply the columns or fields in your database tables, for example, a call number, a collection, or a postal code. However, an attribute may also represent some operation on a column or columns of data, for example, the day of the week for a given transaction or the quarter in which an invoice was paid.

filter

A filter lets you specify criteria that data must meet to be included on a report. Rarely will you run a report without some limit. Running a report without filters may take longer and in some cases may affect system performance. A filter is equivalent to the "where" clause in SQL.

prompt

A prompt is a list of options you can choose from as you run a report or an input for specific filter values.

report

A report is a collection of specific, sometimes filtered, data presented as rows and columns or a graph to help you analyze trends, identify problems, and plan for opportunities to better serve the users and institutions that support your library.

grid

The grid is the portion of the report displaying row and column data.

graph

Graphs are graphical representations of report data, for example, a bar chart or pie chart, a line graph, a histogram, or a scatter diagram.

document

A document is a collection of data from one or more reports usually formatted for a specific purpose such as a dashboard or PDF. Documents can also include additional text, images, and hyperlinks.

dashboard

A dashboard is a special type of document that lets you integrate a number of reports, graphs, or gauges into a single, interactive view. Dashboards can provide quick access to frequently used features and information.

panel

A panel is a discrete, interactive area of a report or dashboard, usually set off with a border and a title bar. Panels are used to organize and display different kinds of information for quick reference.

Related topics

- **Web Reporter user levels** on page 13
- **Web Reporter architecture overview** on page 16
- **Web Reporter Web interface** on page 18
- **Learning about Web Reporter** on page 22

Learning about Web Reporter

Information about Web Reporter is available in several ways.

Web Essentials Guide

This *Web Essentials Guide* is available in PDF or HTML format. Your system administrator will provide you with information about how to access the different versions.

SirsiDynix Training

SirsiDynix offers training specific to Web Reporter for Symphony. For information about available classes and schedules, visit the Training Center at http://sirsidynix.webex.com. For additional training needs, contact your SirsiDynix sales representative.

MicroStrategy Documentation

The MicroStrategy Business Intelligence Platform is delivered with extensive documentation. In addition to the online help available by clicking Help in the shortcut bar in Web Reporter, there are many PDF guides installed with the server software or Desktop client, including guides on basic and advanced reporting and document creation with Report Services.

Because the documentation is proprietary to MicroStrategy, you must be a licensed user to use these documents. Contact your system administrator about documents you can access.

Related topics

- **Using Web Reporter** on page 11
- **About Web Reporter** on page 12
- **Getting around in Web Reporter** on page 26

Logging in

To protect your library data from unauthorized access, you must log in to use reports in Web Reporter. Logging in also lets you save changes to reports, dashboards, and so on, so when you log in again, you can find the information you need more quickly.

An administrator will assign you a username and password to log in to Web Reporter. You may change your password once you log in (see **Changing your password** on page 25).

Your username is not case-sensitive; for example, “user” and “uSeR” are equivalent. Passwords, however, are case-sensitive and must be typed exactly.

Depending on how your system administrator has configured privileges, your login may limit the data you can see and work with. If you need help logging in or have questions about access, contact your system administrator.

Before logging in, you should be sure your browser meets certain requirements. See **Using Web Reporter** on page 11 for more information.

To log in to Web Reporter

1 Open the login page.

2 Type your username and password.

3 Choose **Login**.

If your username and password are correct, the software starts a new session for you and displays your home view.

4 Be sure to log out when you finish using Web Reporter so others will not use your account and to free up server resources.

Related topics

- **Logging out** on page 25
- **Using Web Reporter** on page 11

Logging out

For your security, if you don't do anything in Web Reporter for some time, the server will log you out automatically. However, when you finish using Web Reporter you should be sure to log out so that others will not use your account or make changes to it.

Also, logging out using the Logout option (instead of simply closing your browser) closes your session immediately, freeing up resources for other users. If you just close your browser, the session remains open on the server until it times out.

To log out of Web Reporter

➢ Click the **Logout** option in the shortcut bar.

The software closes your session and confirms that you have been logged out.

Related topics

- **Logging in** on page 23
- **Using Web Reporter** on page 11

Changing your password

You can change your password at any time. You must log in to Web Reporter to change your profile. To learn more, see **Logging in** on page 23.

You must have permissions to change your password. If you cannot change your password, check with your system administrator.

To change your password

1 Log in to Web Reporter if you haven't already.

2 Choose your project if it is not already displayed.

3 Choose **Preferences** from the shortcut bar.

The Preferences page displays.

4 Choose **Change Password** from the list of preference groups on the left.

5 Type your old password in **Old Password**.

6 Type your new password in **New Password**.

7 Re-type your new password in **New Password Verification**.

8 Click **Change Password**.

Related topics

- **Logging in** on page 23
- **Using Web Reporter** on page 11

Getting around in Web Reporter

When you first log in to Web Reporter, you see a project list. After you select a project, the software displays your default start page (see **Default Start Page** on page 29). From there, getting to the features you want is fairly simple. Most features are just a few clicks away. All of the reports and features available to you are organized in folders. You can also collect frequently used reports and shortcuts in My Reports.

For details, see these topics:

- **Shortcut bar** on page 27
- **Navigation bar** on page 28
- **Default Start Page** on page 29
- **Searching for reports** on page 32
- **Related reports** on page 34
- **Creating a shortcut to a report** on page 61

Shortcut bar

Wherever you are in the software, a shortcut bar displays at the top of the window. The shortcut bar provides quick access to common features. Clicking an option takes you to that feature.

The shortcut bar includes these features.

Feature	Description
Shared Reports	Shared Reports lists all the report groups you can use. These are reports delivered with the software or created by report designers in your library. Reports are grouped into folders. Click a folder or the folder title to view reports or other folders in that group.
My Reports	My Reports lists the reports, folders, and shortcuts that you have created.
Create Report	Create Report begins the Create Report workflow. This option is only available if you are logged in as a Web Analyst or Web Professional (see **Web Reporter user levels** on page 13).
Create Document	Create Document begins the Create Document workflow. This option is only available if you are logged in as a Web Professional (see **Web Reporter user levels** on page 13).
My Subscriptions	My Subscriptions lets you manage the subscriptions you have created for scheduled reports.
History List	History List shows the messages related to results for reports you have scheduled.
Preferences	Preferences lets you modify options for viewing and working with reports (see **Setting preferences** on page 35). You can also change your password in Preferences (see **Changing your password** on page 25).

Feature	Description
Search	The Search box lets you do a quick search by entering a word or words in the name of the report or document you want to find. Click the search icon without entering a search term to open the Search page and specify additional options. (See **Searching for reports** on page 32.)
Help	Help opens the MicroStrategy Web online help.
Logout	Logout ends your current session and logs you out of the application (see **Logging out** on page 25).

Related topics

- **Navigation bar** on page 28
- **Default Start Page** on page 29
- **Searching for reports** on page 32
- **Related reports** on page 34

Navigation bar

As you open folders and documents, the navigation bar updates to show the path you've followed in the software or the folder path for the current folder or report. You can quickly return to a specific level by clicking a folder name or the project name in the path.

In addition to the path, the navigation bar includes these options.

Option	Description
	**Home** returns you to the project list.
	**Return** returns you to the previous page or the parent level for a document or folder. In some cases, this is equivalent to clicking your browser's Back button, but it helps to maintain session state.
	**Create New Folder** lets you create a new folder. This option appears only in folder pages.

Option	Description
	**View: List** This option is only available for folder pages and My Subscriptions. Clicking View: List displays folders, documents, and subscriptions in a table format with small icons. Once enabled, this option applies to all folder pages and is persistent across sessions.
	**View: Icon** This option is only available for folder pages and My Subscriptions. Clicking View: Icon displays folders, documents, and subscriptions as large icons with details beside the icon. This is the default view. Once enabled, this option applies to all folder pages and is persistent across sessions.

Related topics

- **Shortcut bar** on page 27
- **Default Start Page** on page 29
- **Searching for reports** on page 32
- **Related reports** on page 34

Default Start Page

When you log in to Web Reporter and select a project, the software displays your default start page. This is also the page that displays whenever you click on the project name in the navigation bar.

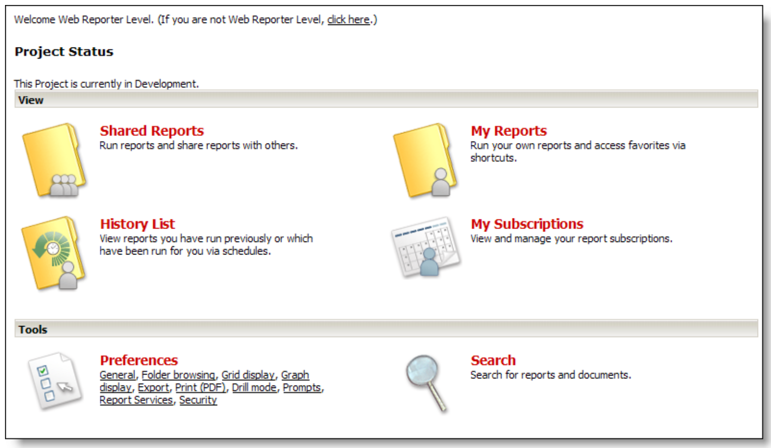
You can specify your default start page in Preferences. Your start page can be the project Home view, the project Summary view, or one of the options in the shortcut bar, such as My Reports or History List. You can also specify a report or dashboard as your start page.

For more information about start page options, choose Help from the shortcut bar and refer to the User Preferences topic in the online MicroStrategy help.

The two most commonly used options are Home and Summary.

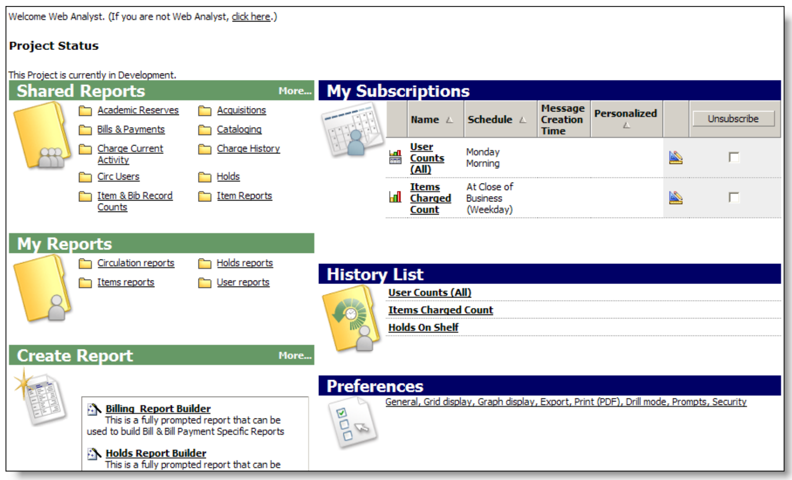
Project Home view

The project Home view displays the major features you can work with depending on your user level and provides a brief description of each area. This is a good start page to work with if you are new to the software or use the software infrequently.



Project Summary view

The project Summary view displays the same features as the Home view, but instead of descriptions of these features, the view shows some of the content of those features and allows you, for example, to work directly with subscriptions in My Subscriptions, messages in your History List, or report groups in Shared Reports or My Reports.



To set your default start page to Home or Summary

1. Log in to Web Reporter if you have not already.
2. Select a project.
3. Choose **Preferences** from the shortcut bar.
4. Select **Home** or **Summary** from the **Default start page** drop-down list.
5. Scroll to the bottom of the User Preferences form and choose **Apply**. (You can choose to apply this change to the current project or all projects.)

   The software confirms that your changes are saved.

To set your default start page to a specific folder, report, or document

1 Log in to Web Reporter if you have not already.

2 Select a project.

3 Open the folder, report, or document that you want to use as your start page.

4 Choose **Preferences** from the shortcut bar.

The software displays a new option for default start page showing the name of the folder, report, or document you opened.

5 Select **Last folder** (or **Last report** or **Last document** depending on what you opened).

6 Scroll to the bottom of the User Preferences form and choose **Apply**. (You can choose to apply this change to the current project or all projects. Since folders, reports, and documents are typically project-specific, you should apply this change only to the current project.)

The software confirms that your changes are saved.

Related topics

- **Shortcut bar** on page 27
- **Navigation bar** on page 28
- **Searching for reports** on page 32
- **Related reports** on page 34

Searching for reports

Usually, you will find reports using folder pages. But if you can't find a report you need, you can search for it by entering part of the name.

You can do a quick search by simply typing a string in the Search box in the shortcut bar, or click on the Search icon without entering a term to open the Search page.

Searches are not case-sensitive, for example, "user" and "User" are equivalent. By default, a simple search matches the string you type anywhere in the name (the search type is "contains"). You can choose Advanced on the Search page to specify additional options.

Search results will include matching reports and documents regardless of access controls. For example, you may see reports that you do not have permissions to access. If you try to open these reports, the software will return errors.

To search for a report or document by name

1 Click the search icon in the shortcut bar without entering a search term.

The Search page displays.

2 Type part of the name in the search box.

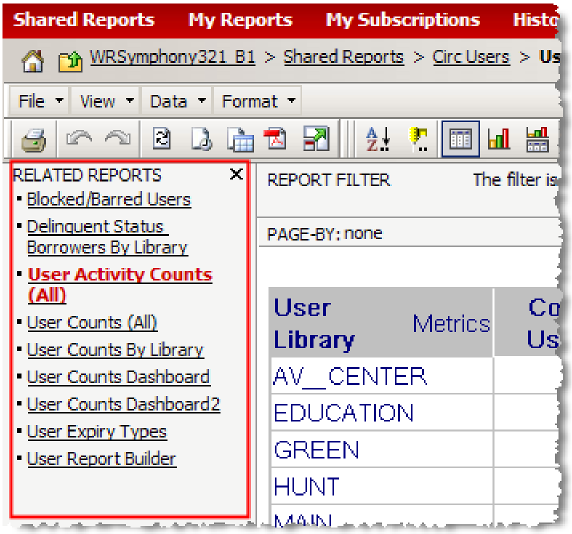
3 Choose **Search**.

Related topics

- **Shortcut bar** on page 27
- **Navigation bar** on page 28
- **Default Start Page** on page 29
- **Related reports** on page 34

Related reports

If there are several reports you work with in a given report group, you may find it helpful to use the Related Reports panel. The Related Reports panel is available in the reports workspace. As you open reports and documents, it lists the other reports and documents you have access to in the same report group.



To open another report or document in that group, you can just click on it in Related Reports without needing to return to the folder page.

Once you open the Related Reports panel, it stays open for all reports or documents until you close that panel again.

To view the Related Reports panel

1. Open a report or document.
2. Choose **View** > **Related Reports**.

To close the Related Reports panel

➢ Click the Related Reports panel close button.

Related topics

- **Shortcut bar** on page 27
- **Navigation bar** on page 28
- **Default Start Page** on page 29
- **Searching for reports** on page 32

Setting preferences

User Preferences let you configure options that fit the way you work. You can specify your preferences for such things as export, printing, drilling, grid and graph display, or prompts for example. User Preferences is also where you change your password.

For details on specific preferences, click Help in the shortcut bar and refer to the User Preferences topic.

Be sure to choose Apply for each preference group after making changes. If you switch to a different preference group before choosing Apply, your changes will not be saved.

You must have permissions to change user preferences. If you cannot change preferences, check with your system administrator.

To configure user preferences

1. Log in to Web Reporter if you have not already.
2. Select a project.
3. Choose **Preferences** from the shortcut bar.

   The User Preferences General form displays with a list of preference groups you can configure on the left (for example, Export, Print, Prompts, and so on).
4. Choose the preference group you want to configure.
5. Specify your preferences.

6 Choose **Apply** at the bottom of the form to save your changes. (You can choose to apply this change to the current project or all projects.)

The software confirms that your changes are saved.

7 Configure other preference groups as needed.

Related topics

- **Getting around in Web Reporter** on page 26
- **Changing your password** on page 25
- **Default Start Page** on page 29
- **About Web Reporter** on page 12

Chapter 3: Basic User Tasks

This section describes the tasks a Web Reporter user can do. These tasks are common to all user levels. For more information about different license levels, see **Web Reporter user levels** on page 13.

About reports

Reports let you view and analyze your library data in many ways. Starting from a set of base reports, you can select and filter data to help you analyze trends, identify problems, and plan for opportunities in your library.

The reports workspace displays data in various panels (see **Elements of a report** on page 39). Each panel shows report data or information about the report. Some panels let you interact with the data that displays. Once the report shows what you want, you can print the report or export the data for further analysis in another application.

The reports and documents you use are organized into folders or groups. Many reports are shared and appear in the Shared Reports folder. There may also be reports and shortcuts that only you can use. These are organized in My Reports.

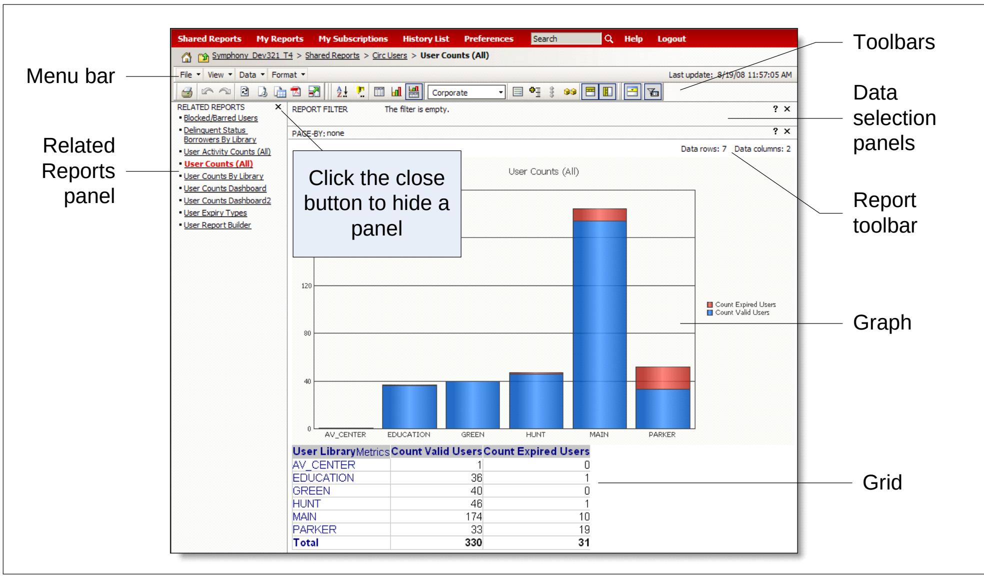
The report options available to each user and the data that they see depend on privileges assigned to each user account. If you share a report with others who have different permissions than you, they may not see the report in the same way you do. If you have questions about access, talk to your system administrator.

For more information, see these topics.

- **Elements of a report** on page 39
- **Types of report objects** on page 41
- **Viewing reports** on page 42
- **Printing a report** on page 57
- **Exporting a report** on page 59
- **Creating a shortcut to a report** on page 61

Elements of a report

Here is a sample of the reports workspace with a description of some of the key features referred to in this guide.



Menu bar

The menu bar lists the options available based on your user level. Many of these options also appear as buttons on the various toolbars.

Related Reports panel

As you work in the reports workspace, the Related Reports panel lists other reports and documents you have access to in the same report group. With this panel displayed, you can easily run other reports in the same group. For more information, see **Related reports** on page 34.

Toolbars

Toolbars display commonly used report options for quick access. The buttons and toolbars that display depend on your user level and on what you can do with the current report.

Report toolbar

The Report toolbar shows the amount of data currently displayed. Where there is more data than can display in a single view, the Report toolbar will also indicate the number of pages of data and which page is displayed. Links allow you to display other pages.

(This is different than the Page-by panel that allows the report designer to choose one or more attributes for grouping data. See **Using Page-by** on page 50.)

Data selection panels

Several panels show you information about limits currently applied to a report or let you select data to display.

Panel	Description
Report Filter	Shows the current filter selections in effect based on your answers to report prompts or limits assigned by the report designer. (See **Viewing report filters** on page 49.)
View Filter	Lets Web Analyst or Web Professional users select a subset of the data returned with a report. This panel is only available to Web Analyst or Web Professional users licensed for OLAP services.
Page-by	Report designers can choose to group data by selected attributes or metrics. The Page-by Axis panel shows you the current group and lets you select other groups from a list. (See **Using Page-by** on page 50.)
Drill	Lets you view and work with any drill maps included in a report. (See **Drilling** on page 55.)

Panel	Description
Object Browser	Lets Web Analyst or Web Professional users add or remove data elements on a report.
Grouping	The Grouping panel displays only for documents. Document designers can choose to group data by selected attributes. The Grouping panel shows you the current group and lets you select other groups from a list.

Graph

You can show or hide the Graph area for a report using the View menu or one of the Graph toolbar options.

Grid

The Grid area of a report displays data in rows and columns. You can show or hide the grid for a report using the View menu or toolbar options. You may also be able to click or right-click headings or data in a grid to do other actions, for example, sorting or drilling.

Related topics

- **Viewing reports** on page 42
- **Types of report objects** on page 41

Types of report objects

There are several types of report objects in Web Reporter each with a different icon to help you more easily recognize them in report folders.

Icon	Description
	**Folder** Folders group reports, documents, shortcuts, and other folders to help you better organize the report objects you work with.

Icon	Description
	**Grid report** A report with only a grid to show data.
	**Grid and graph report** A report that displays data in both grid and graph formats.
	**Graph only report** A report with only a graph view; grid data is hidden.
	**Document** A document collects data from one or more reports and displays as a dashboard in HTML or Flash or as a PDF.
	**Shortcut** You can create shortcuts to any report object. The icon for a shortcut adds a small arrow to the lower-left corner of the usual object icon, as in this example of a shortcut to a grid report (see **Creating a shortcut to a report** on page 61).

Related topics

- **Viewing reports** on page 42
- **Elements of a report** on page 39

Viewing reports

Reports and documents are generally organized by functional area in either Shared Reports or My Reports. Some reports and documents execute directly; others may have prompts to let you limit the data (see **Answering prompts** on page 48). In either case, just click on the report or document you want to view to start the process.

Some reports take longer than others to return results. When you run a report, a Processing Request page may display to indicate that the report is still running. This page automatically updates periodically, but you also have the option to check status again or cancel the report.

Your system administrator can limit the maximum execution time for reports (the time it takes to return report results once you start the report process, including time you spend answering prompts). The default is 10 minutes. If a report takes longer than the maximum, the software will return an error. If a report takes too long or does not return any data, try changing your answers for any prompts and run the report again.

Your system administrator can also configure caching. Caching saves the results of a report for a brief period. If you need to run the same report again with the same answers to prompts and the results are still cached, you will notice that the report loads more quickly.

After results are displayed, you can choose Refresh from the Data menu (or use the Refresh option on the toolbar) to update the results with the latest data without having to answer prompts again. If you want to change some of your answers for prompts, you can choose Reprompt.

For more information about the reports workspace, see **Elements of a report** on page 39.

To view a report

1. Use the folders in **Shared Reports** or **My Reports** to locate the report you want.
2. Click on the report.
3. Answer prompts if any (see **Answering prompts** on page 48).
4. Choose **Run Report**.

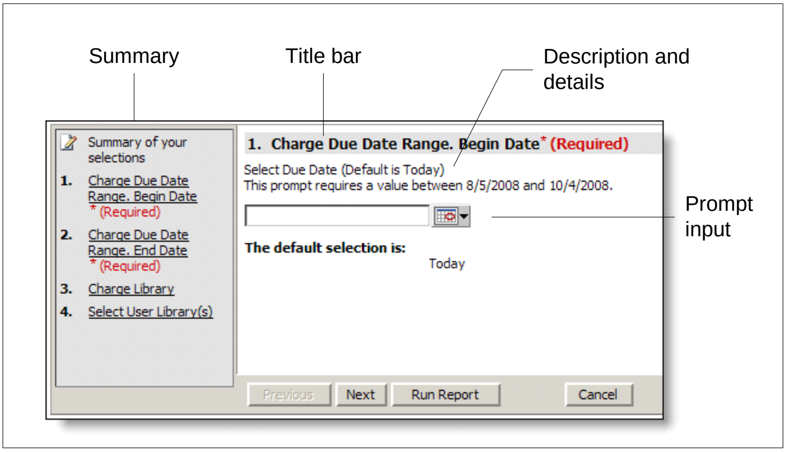
   The software executes the report and either returns results or reports status or errors.

Related topics

- **About reports** on page 37
- **About prompts** on page 44
- **Answering prompts** on page 48
- **Viewing report filters** on page 49
- **Using Page-by** on page 50
- **Sorting** on page 52
- **Drilling** on page 55
- **Printing a report** on page 57
- **Exporting a report** on page 59
- **Report builder reports** on page 62

About prompts

Some reports include prompts to let you select and limit data. Each prompt has a title bar and sometimes a description explaining the expected input. The title bar also indicates if the prompt is required. Information about valid and default values appears below the prompt.



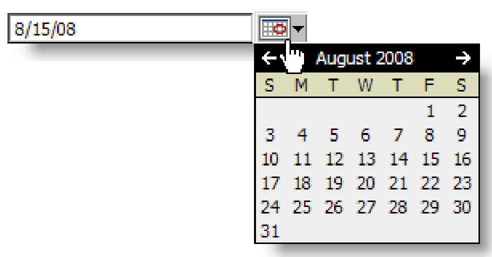
If there is more than one prompt for a given report, a summary displays the prompt titles for each prompt. In User Preferences > Prompts, you can choose if you want to display all prompts in a single page or each on a separate page. (See **Setting preferences** on page 35 for more about user preferences.)

When prompts appear on separate pages, you can use the Next and Previous buttons to move among prompts, or you can simply click the prompt title in the summary to go to a specific prompt.

The report designer determines the prompt style. For example, a prompt may be a simple text box; a list of check boxes or radio buttons; a drop-down list; or selection lists. These prompts function like any Web form. The date prompt and the cart-style prompt have additional functionality.

Date prompt

A date prompt lets you specify a date by typing or by selecting it from a calendar.



You type a date with slashes using m/d/yy or m/d/yyyy format, for example 8/15/2008.

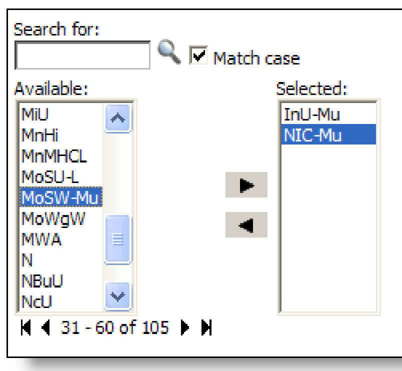
The date format may vary depending on the date format specified in user preferences.

Or you can select a date by clicking the calendar button. If the date range is limited by the report designer, dates outside the range will be inactive.

The calendar button will not display if you have disabled Dynamic HTML in user preferences.

Cart-style prompt

The cart-style prompt lets you select multiple options. Shift-click to select a range of options; Ctrl-click to select additional options one at a time. You can also Ctrl-click a selected option to clear the selection. Double-click options or use the Add/Remove arrow buttons to move options from one list to the other.

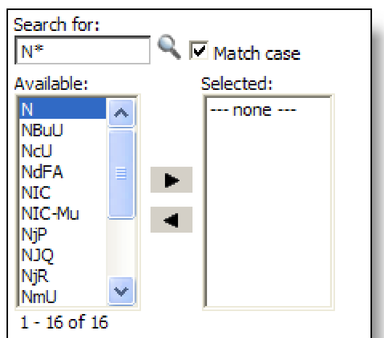


Sometimes the number of options available may exceed the Available list size. In this case, the software will show the number of current options, with arrows to display the next or previous set of options.

The order of selected options is significant. For metrics and attributes that appear in columns of a report, the order in which you add options to the Selected list determines the order in which those options appear in the report. By default, options are added to the bottom of the list. But you can control where options are added by selecting an option in the Selected list; other options will be added above the selection. For example, if you have IrU-Mu and NIC-Mu in the Selected list and NIC-Mu is selected, the next options you add will appear between IrU-Mu and NIC-Mu instead of at the bottom of the list.

If Dynamic HTML is disabled in user preferences, options are only added to the bottom of the list regardless of what is selected in the Selected list.

Where there are many options in the Available list, the Search For feature lets you limit the list to those options that match a search string you specify. The default search mode is “contains”, meaning the string you type can appear anywhere. For example, typing “N” will find all options with N anywhere in the value. You can use asterisk (*) to trigger left, right, or middle truncation. The asterisk represents zero or more characters. For example, “N*” will display all options beginning with the letter N.



Related topics

- **About reports** on page 37
- **Viewing reports** on page 42
- **Answering prompts** on page 48
- **Viewing report filters** on page 49
- **Using Page-by** on page 50
- **Sorting** on page 52
- **Printing a report** on page 57
- **Exporting a report** on page 59
- **Report builder reports** on page 62

Answering prompts

Rather than create a static report that always displays the same information, a report designer may add prompts to a report to let you select what filters to use and what data to include in the report.

Some prompts are required. If you fail to answer a required prompt, when you choose Run Report the software will return you to that prompt and remind you that it is required.

In some cases, the prompts you answer limit options in subsequent prompts. For example, you may be prompted to select a fund library so that the software can display funds specific to that library, or you may be prompted to select specific filters and then prompted to select options for those filters.

After results are displayed, you can choose Report Filter from the View menu (or use the Report Filter option on the toolbar) to view the filters applied based on your answers to prompts (see **Viewing report filters** on page 49). If you want to change some of your answers for prompts, you can choose Reprompt from the Data menu (or use the Reprompt option on the toolbar).

To answer prompts while executing reports

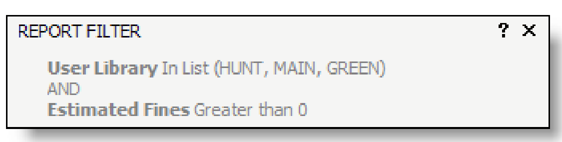
1. Open a prompted report.
2. Specify options according to the prompt style (see **About prompts** on page 44).
3. Choose **Run Report** to continue the report process.

Related topics

- **About reports** on page 37
- **Viewing reports** on page 42
- **About prompts** on page 44
- **Viewing report filters** on page 49
- **Using Page-by** on page 50
- **Sorting** on page 52
- **Drilling** on page 55
- **Printing a report** on page 57
- **Exporting a report** on page 59
- **Report builder reports** on page 62

Viewing report filters

As you work with reports, the Report Filter feature lets see how report data has been limited by the report designer or by your answers to report prompts.



The Report Filter panel displays below toolbars in the reports workspace (see **Elements of a report** on page 39).

Once you enable the Report Filter panel, it will display automatically for subsequent reports.

To view report filters

1 Execute a report.

2 Choose **View > Report Filter** (or click the Report Filter option  on the toolbar).

The software displays the Report Filter panel. (If the Report Filter panel is already displayed, choosing Report Filter hides the panel.)

Related topics

- **About reports** on page 37
- **Viewing reports** on page 42
- **Answering prompts** on page 48
- **Using Page-by** on page 50
- **Sorting** on page 52
- **Drilling** on page 55
- **Printing a report** on page 57
- **Exporting a report** on page 59
- **Report builder reports** on page 62

Using Page-by

Reports generally have two axes (rows and columns), but if a report has many attributes or metrics, it may be difficult to view. To make it easier to view and understand the data, a report designer can group data along a third axis called the Page-by axis.

The Page-by axis may include one or more elements. It lets you view smaller sections of a report one page at a time.

Once you enable the Page-by panel, it will display automatically for subsequent reports. This lets you know immediately if a report uses Page-by.

To view sections of a paged report

1. Open a report.
2. If the Page-by panel is not already displayed, choose **View > Page-By Axis** (or click the Page-by Axis option  on the toolbar).
3. Select the page you want to view from a drop-down list in the Page-by panel.

If Dynamic HTML is disabled in user preferences, a Go button appears next to the list. Click Go after selecting an option from the list to view that page.

Related topics

- **About reports** on page 37
- **Viewing reports** on page 42
- **Answering prompts** on page 48
- **Viewing report filters** on page 49
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- **Printing a report** on page 57
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- **Report builder reports** on page 62

Sorting

In Web Reporter, you can sort data in two ways.

If you want to sort a single column, you can simply right-click a column heading and choose a sort option.

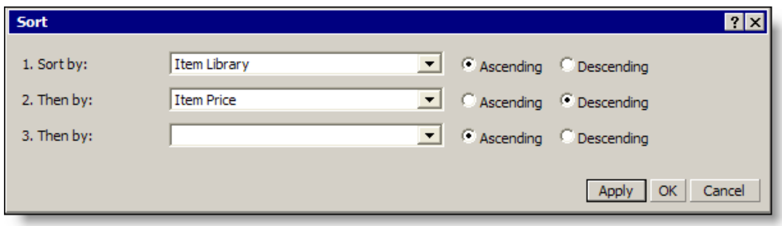
Sometimes, however, it's useful to sort multiple columns. Say, for example, you were viewing a report that showed collection value by item type for many libraries.

Item Library	Item Type	Metrics	Item Price	Item Count	Avg Price
GREEN	BOOK		$46,490.55	1,138	$40.85
	LPRECORD		$100.00	2	$50.00
	MAGAZINE		$456.26	6	$76.04
	MAP		$55.00	1	$55.00
	PAPERBACK		$2,730.00	204	$13.38
	REF-BOOK		$50.00	1	$50.00
	SCORE		$87.95	3	$29.32
	SERIAL		$50.00	1	$50.00
	Total		**$50,019.76**	**1,356**	**$36.89**
HUNT	BOOK		$129,336.60	2,607	$49.61
	CD-ROM		$2,100.00	42	$50.00
	DATABASE		$500.00	10	$50.00
	EQUIPMENT		$50.00	1	$50.00
	FSSOUND		$250.00	5	$50.00
	KIT		$800.00	16	$50.00

You'd like to see the highest value item types first. If you simply sort by Item Price, all the libraries would be mixed together.

Item Library	Item Type Metrics	Item Price	Item Count	Avg Price
MAIN	SERIAL	$1,143,800.00	11,450	$99.90
	BOOK	$283,692.15	5,735	$49.47
HUNT	BOOK	$129,336.60	2,607	$49.61
GREEN	BOOK	$46,490.55	1,138	$40.85
MAIN	MAGAZINE	$37,000.00	419	$88.31
HUNT	SERIAL	$19,100.00	382	$50.00
	MAP	$12,895.00	258	$49.98
PARKER	BOOK	$5,913.69	146	$40.50

A multi-column sort lets you first sort by library ascending then by Item Price descending.



This preserves the library groups and the totals for each library while showing the highest value item types first.

Item Library	Item Type Metrics	Item Price	Item Count	Avg Price
GREEN	BOOK	$46,490.55	1,138	$40.85
	PAPERBACK	$2,730.00	204	$13.38
	MAGAZINE	$456.26	6	$76.04
	LPRECORD	$100.00	2	$50.00
	SCORE	$87.95	3	$29.32
	MAP	$55.00	1	$55.00
	REF-BOOK	$50.00	1	$50.00
	SERIAL	$50.00	1	$50.00
	Total	**$50,019.76**	**1,356**	**$36.89**
HUNT	BOOK	$129,336.60	2,607	$49.61
	SERIAL	$19,100.00	382	$50.00
	MAP	$12,895.00	258	$49.98
	MICROFORM	$4,500.00	90	$50.00
	VIDEO	$2,550.00	51	$50.00
	CD-ROM	$2,100.00	42	$50.00
	KIT	[illegible]	[illegible]	[illegible]

To sort a single column

1. Execute a report.
2. Right-click on the heading for the column you want to sort.
3. Choose **Sort > Ascending** or **Sort > Descending** from the menu that appears.

   The software refreshes the report using the sort you specified.

If Dynamic HTML is disabled in user preferences, you must first choose “Show sort buttons” and then click a sort button in the column heading.

To sort multiple columns

1. Execute a report.
2. Choose **Data > Sort** (or click the Sort option on the toolbar).

   The Sort window displays.

3. Specify sort options for the columns you want to sort.
4. Choose **OK**.

   The software refreshes the report using the sort you specified.

Related topics

- **About reports** on page 37
- **Viewing reports** on page 42
- **Answering prompts** on page 48
- **Viewing report filters** on page 49
- **Using Page-by** on page 50
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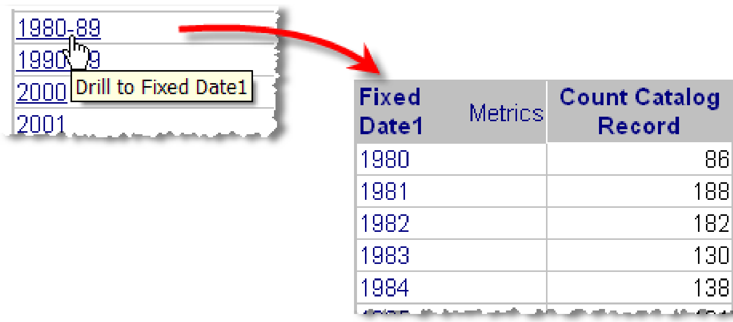
Drilling

Some reports let you drill to see additional information related to the current report. For example, you may be able to drill through to a list of titles from a collection report or drill through to contact information from an overdue fines report. The ways you may drill are defined by the report designer.

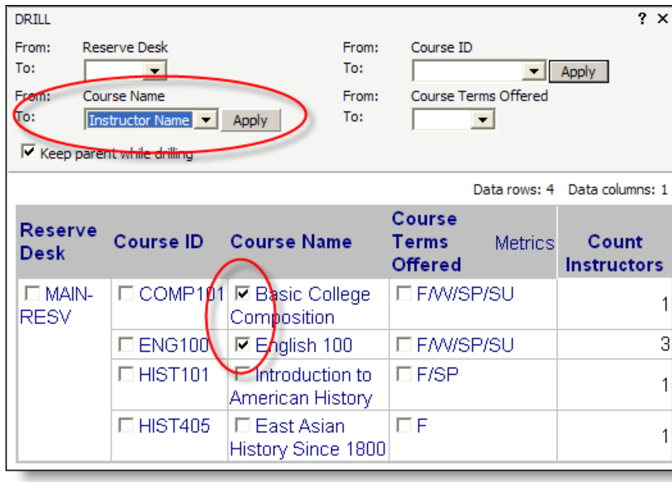
In some reports, drill options may appear as links. You can simply click a data element to drill through to related data.



In other reports, fields that allow drilling may not be obvious. If you know that a particular field in a report allows drilling, when the Drill panel is not displayed you can right-click a data element in the list and choose a drill option from the menu that appears.

You can also use the Drill panel to view drilling options for a report. You open the Drill panel by choosing Data > Drill or clicking the Drill option on the toolbar.

When the Drill panel is open, fields in the Drill panel that allow drilling will display an Apply button, and data elements in the report grid will display with check boxes. To drill, in the grid select the data elements you want to drill on; in the Drill panel select the data to drill to and choose Apply.



Web Analyst and Web Professional users may have additional drilling options. Refer to the MicroStrategy online help for information about advanced drilling.

Be careful to select specific data elements before drilling. If you do not make any selections, the software will attempt to drill on all elements, which could return a lot of data.

When you drill in a report, the results may display in a new window depending on selections in User Preferences > Drill Mode.

To drill in a report using Drill panel

1. Open a report that allows drilling.
2. Choose **Data > Drill** (or click the Drill option on the toolbar).

   The Drill panel opens and the software displays check boxes for each data element in the grid.

3 Select the data elements you want to drill on.

4 Select the data to drill to from a list in the Drill panel.

5 Choose **Apply** for that field.

The software executes the report using the drill you specified.

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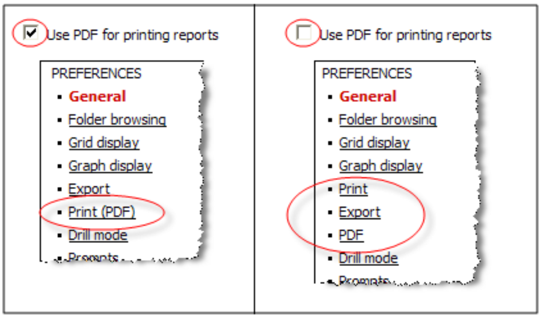
Printing a report

You can print reports using your browser or using PDF depending on whether "Use PDF for printing reports" is selected in User Preferences > General > Output Formats (see **Setting preferences** on page 35).

When “Use PDF for printing reports” is selected, you will see only a “Print (PDF)” preference group in preferences and the Print and PDF options in the reports workspace are essentially the same. When “Use PDF for printing” is clear, there are separate preference groups for Print and PDF. You can specify options for each independently.



The Show Options option in the Print, PDF, and Print (PDF) preference groups specifies if the software should prompt you each time you print a report. If you are prompted to choose options when printing and you choose “Do not prompt me again”, the software clears the Show Options option and saves your settings to preferences to use for all future print requests.

There are no options when printing documents.

To print a report

These steps assume your preferences are set to show options when printing.

1 Open the report you want to print.

2 Choose **File > Print** (or click the Print option  on the toolbar).

The software displays print options in a new window.

3 Specify print options.

(Choose Help from the shortcut bar for details on specific options.)

4 Choose **Show Printable Version**.

The software formats the report for printing based on your selections and then displays the report as HTML or PDF.

Note: If you print to PDF and do not have a PDF reader installed, your browser will prompt you to save the file instead of displaying it.

5 Use the print feature in your browser or PDF reader to print the file.

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- **Viewing reports** on page 42
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Exporting a report

You can export report data to a number of file formats including HTML, CSV (comma-separated values), plain text, or Excel, depending on preferences in User Preferences > Export (see **Setting preferences** on page 35).

The Show Options option in the Export preference group specifies if the software should prompt you each time you export a report. If you are prompted to choose options when exporting and you choose "Do not prompt me again", the software clears the Show Options option and saves your settings to preferences to use for all future export requests.

You may export the whole report or only the portion of the report currently displayed.

To export report data

These steps assume your preferences are set to show options when exporting.

1. Open the report you want to export.
2. Choose **File > Export** (or click the Export option on the toolbar).

   The software displays export options in a new window.
3. Specify options for export.

   (Choose Help from the shortcut bar for details on specific options.)
4. Choose **Export**.

   The software creates a new file using the options you specified and returns it to your browser. Your browser will prompt you to save or open the file.

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Creating a shortcut to a report

If there are reports you work with frequently from various report groups, it may be helpful to create shortcuts and access them from a common group in My Reports, for example.

To create a shortcut to a report

1. Use the folders in **Shared Reports** or **My Reports** to locate the report you want.
2. Right-click on the report.
3. Choose **Create Shortcut** from the menu that appears.

   A window opens prompting you to select a location for the shortcut.
4. Locate the folder where you want to save the shortcut. You can create a new folder using the Create New Folder option .
5. Choose **OK**.

   The shortcut is created in the folder you specified.

The Web Reporter user level does not allow deleting folders or shortcuts. If you need to delete a folder or shortcut and you do not see a Delete option when you right-click report objects in My Reports, talk to your system administrator.

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Report builder reports

The Web Reporter user level does not allow creating reports. However, report designers can create fully prompted reports that allow you to select from lists of attributes, metrics, and filters to define potentially hundreds of different reports. Several reports like this are delivered with the software and include the term "Report Builder" in the report name. (This approach to designing reports is similar to the Report Builder tool available in the MicroStrategy Desktop application.)

When you use report builder reports, you must select at least one attribute and at least one metric if any. Filters are often optional, but if you do not specify a filter, the report may return a lot of data.

The order in which you select attributes and metrics is the order they appear in the report. (For more information, see **About prompts** on page 44.) For example, if you want to create a report about holds grouped by library, you would select the library attribute first, then the hold attributes you want.

Web Analyst and Web Professional users can rearrange columns after running a report. The Web Reporter user cannot.

To use a report builder report

1. Use the folders in **Shared Reports** to locate the "Report Builder" report you want.
2. Click on the report.
3. Select the attributes and metrics for your report (see **Answering prompts** on page 48). Be careful to consider the order of your selections.
4. Select one or more filters for your report. (It's a good idea to use at least one filter or the report may return a lot of data.)
5. Choose **Run Report**.

   The software evaluates your selections and prompts you to specify filter criteria for any filters you selected.

6 Select options for the filters you specified.

7 Choose **Run Report**.

The software executes the report and either returns results or reports status or errors.

If the report does not return the data you want, choose Reprompt and modify your selections.

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