



Gale Usage Reports Portal User Guide

Updated January 2019

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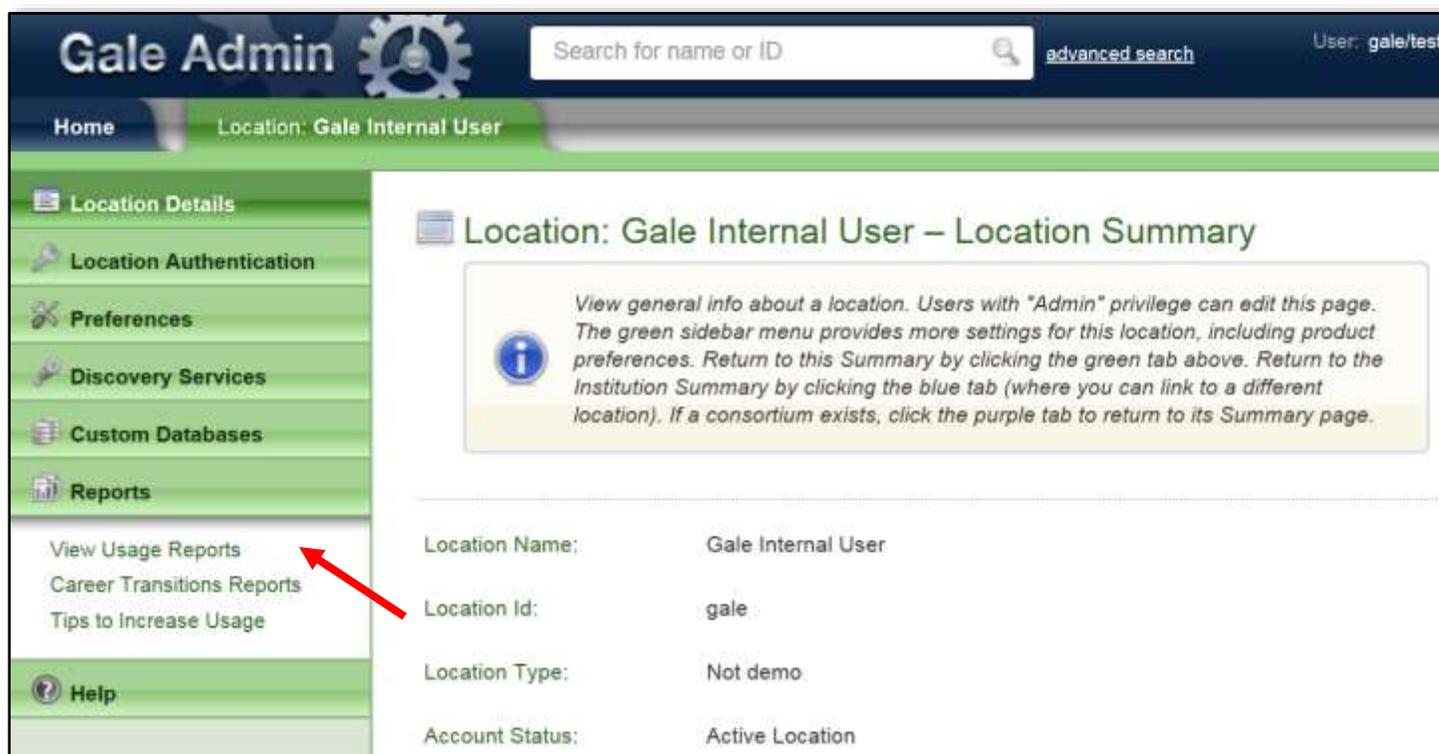
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Accessing the Gale Usage Reports Portal through Gale Admin

The Gale Usage Reports is available through Gale's Administrative Tool, [Gale Admin](#).

1. Log into [Gale Admin](#) with your administrative credentials.
2. Select your account. Most users will only see one account.
3. Select **Reports > View Usage Reports**.

Note: If you have access to multiple Gale Admin credentials and need to access a different account, please log out of **both** Gale Admin and the Gale Usage Reports Portal **or** close the entire browser session (click on the x on your browser to close the session) and open a new one.



The screenshot displays the Gale Admin web interface. At the top, there is a search bar with the text "Search for name or ID" and a magnifying glass icon, followed by a link to "advanced search" and the user name "User: gale/test". Below the search bar, there are navigation tabs for "Home" and "Location: Gale Internal User". A green sidebar on the left contains several menu items: "Location Details", "Location Authentication", "Preferences", "Discovery Services", "Custom Databases", "Reports", and "Help". The "Reports" menu item is expanded, showing three sub-options: "View Usage Reports", "Career Transitions Reports", and "Tips to Increase Usage". A red arrow points to the "View Usage Reports" option. The main content area displays the "Location: Gale Internal User – Location Summary" page. It includes an information icon and a text box with instructions: "View general info about a location. Users with 'Admin' privilege can edit this page. The green sidebar menu provides more settings for this location, including product preferences. Return to this Summary by clicking the green tab above. Return to the Institution Summary by clicking the blue tab (where you can link to a different location). If a consortium exists, click the purple tab to return to its Summary page." Below this text is a table of location details:

Location Name:	Gale Internal User
Location Id:	gale
Location Type:	Not demo
Account Status:	Active Location

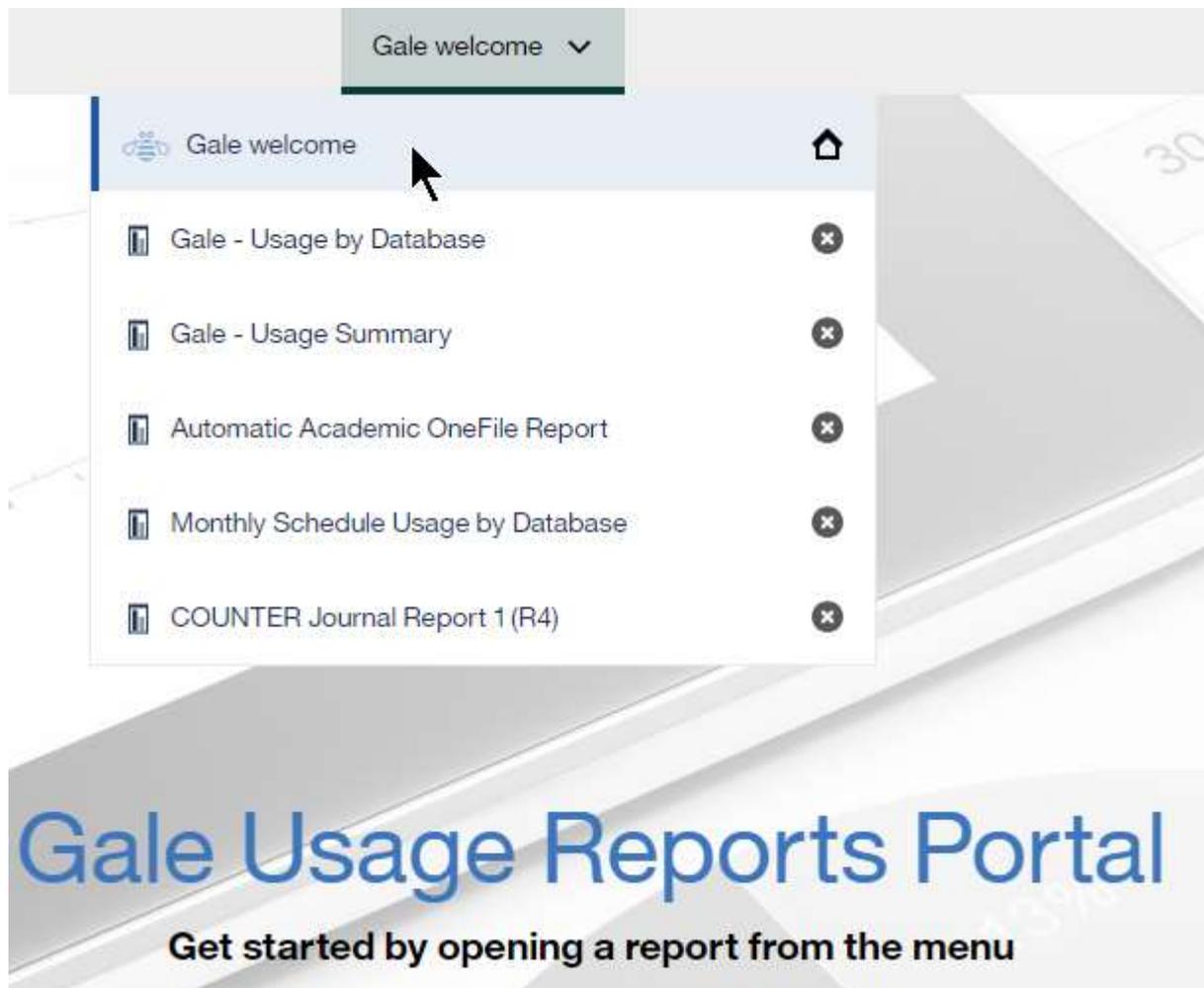
Navigation Tool

Once a report is opened, the report will be listed in the Navigation menu at the top of the Gale Usage Reports Portal. Over the course of a Gale Usage Reports Portal session, several reports can be opened.

Use the Navigation menu to navigate between open reports and to resume activity on an open report.

Use the Navigation menu to close reports and to return to the homepage.

1. Click **Gale welcome** to close or navigate to reports run during your session.



How to Run a Report On-Demand

Reports are all contained in folders in the left-side menu.

The **Gale Reports** folder contains all the Gale standard reports.

The **COUNTER** folder contains all COUNTER reports.

The **Location Reports** contains all Location Detail Reports.

Follow these steps to run any of the reports to appear in your browser.

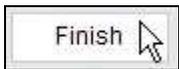
1. Locate your desired report in the one of the Reports folders. Click on the Report name to launch the Report Selection Criteria page.



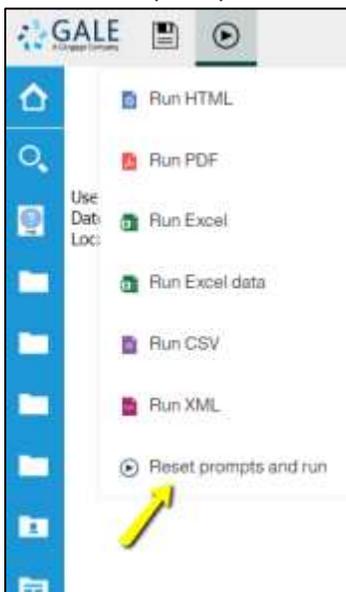
2. The Report Selection Criteria page give you the option to customize the date range and other details of the report (a complete list of prompts can be found at the end of this guide).

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

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



4. To reset prompts and run the report again, select Reset prompts and run from the **Run As** menu.



How to Run a Report in the Background (Run As)

Running a report in the background enables email delivery of on-demand reports. Reports set to run the background can be delivered via email instead of appearing or downloading in the browser session.

1. Locate the desired report. Select the ellipses for More Options.



2. Select **Run As** from More Options menu.



3. Select **Run in Background**. Enter prompts such as Report Format and Delivery Time.

Run as

Run in background

Excel

Excel Data

PDF

HTML

CSV

XML

Prompt me

Advanced ^

Now Later

Languages >

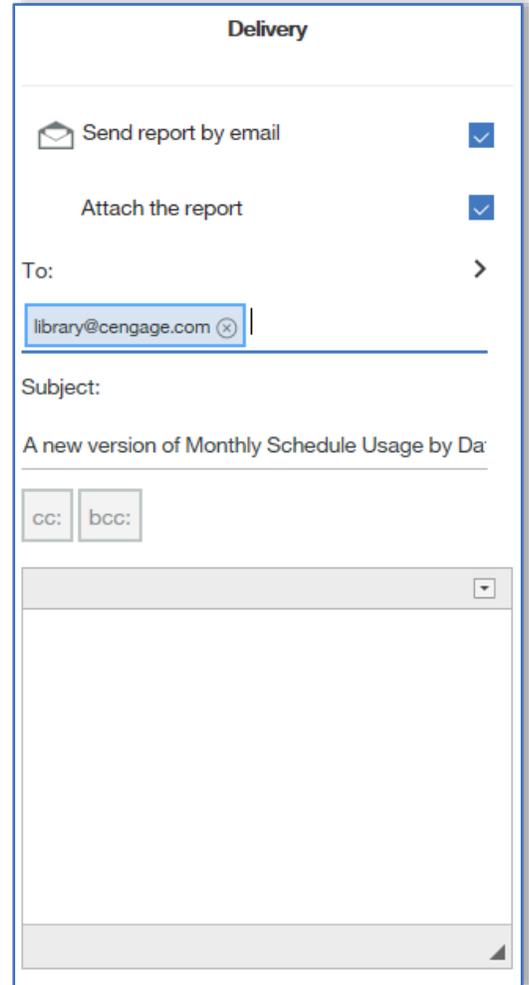
Delivery >

[Classic view](#)

4. To add email as delivery method:
 - a. Click Delivery to add **Email** as Delivery method.



- b. Select **Send report by email**.
 - c. Enter the email address on the **To:** line.
 - d. **Select Attach the report**.



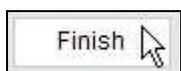
- e. Click **Done** to save Delivery values and return to the Run As page.



5. Click the **Run** button to launch the Report Criteria Selection page.



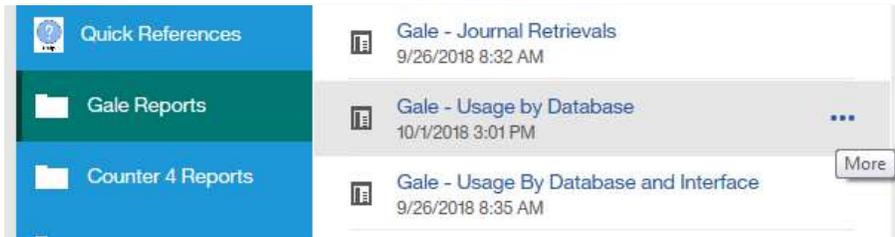
6. The Report Selection Criteria page give you the option to customize the date range and other details of the report (a complete list of prompts can be found at the end of this guide). Use the available prompts to configure the report as desired, or do nothing to accept the default values.
7. Click the **Finish** button. The report will be delivered via email.



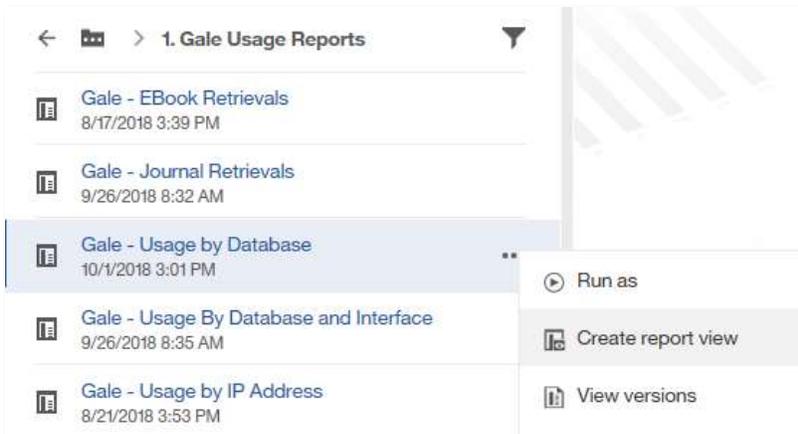
How to Create a Report View

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

1. Locate the report for which you would like to create a custom view.
2. Hover over the desired report. An ellipsis icon will be visible for More Options.
3. Click **More Options** or the ellipsis icon.



4. Select **Create Report View**

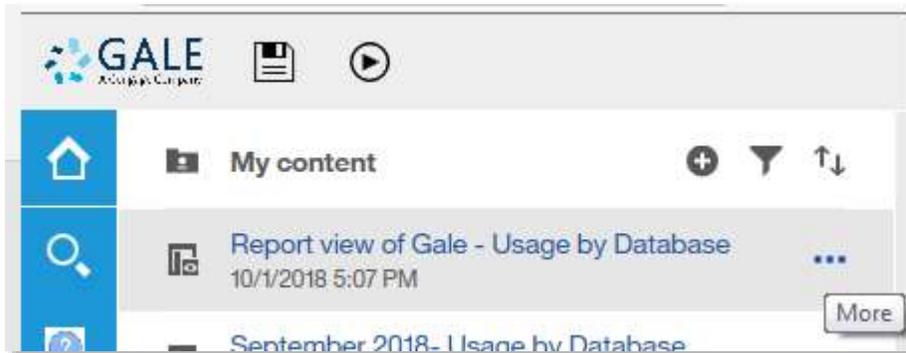


5. Click the **My content** folder. Add a meaningful name for Report View. Click the Save button to save the report view and return to the main window.

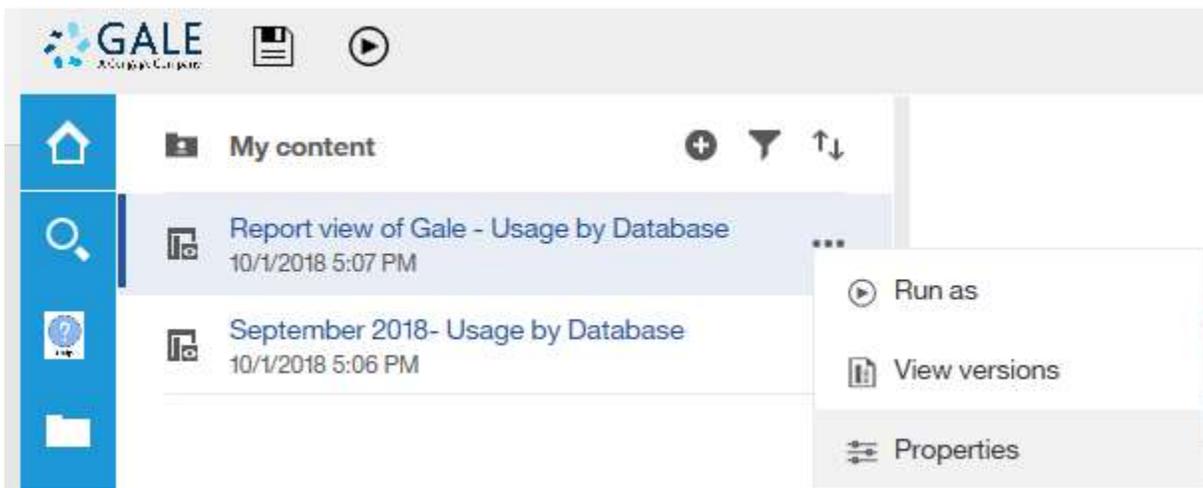


How to Schedule a Report to Run Recurrently

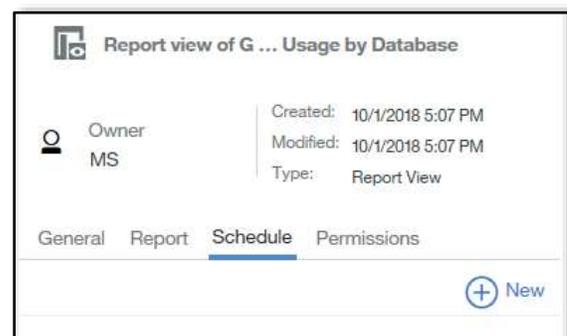
1. If you haven't already done so, first, create a report view of the desired report as described in **How to Create a Report View**
Note: If you want multiple schedules for a given report, you'll need to create a separate report view for each schedule.
2. Locate the desired report in your **My Content** folder. Hover over the desired report. An ellipsis icon will be visible for More Options.
3. Click the More Options through **ellipses icon**.



4. Click on **Properties** in the More Options Menu.



5. Click on **Schedule** among the Properties. Select **New**.



6. **Create schedule.** See a description for common prompts below. Click create to finish creating schedule.

← Back **Create schedule**

Schedule **Select the schedule frequency.** Monthly ▾

Period

Start 2018-12-02 6:32 PM

End 2019-03-02 6:32 PM

No end date

Run on

Day of the month

Day of the week

Day 4 ▾

Repeat every 1 Month(s)

Daily time interval

Options

Format **Select the report format.** HTML >

Delivery **Enter the Email Delivery Details (see Step 7).** Save >

Prompts Set values >

Languages English (United States) >

PDF Select

[Classic View](#)

Create Cancel

- 7. To add email as delivery method:
 - a. Click Delivery to add **Email** as Delivery method.



- b. Select **Send report by email**.
- c. Enter the email address on the **To:** line.
- d. **Select Attach the report**.

A screenshot of the "Delivery" settings form. At the top, the word "Delivery" is centered. Below it, there are two rows of settings: "Send report by email" with a checked checkbox, and "Attach the report" with a checked checkbox. Below these is the "To:" field, which contains the email address "library@cengage.com" and a right-pointing chevron. Underneath is the "Subject:" field, which contains the text "A new version of Monthly Schedule Usage by Da". At the bottom of the form, there are "cc:" and "bcc:" labels. The form has a light gray background and a blue border.

- e. Click **Done** to save Delivery values and return to the Create schedule page.



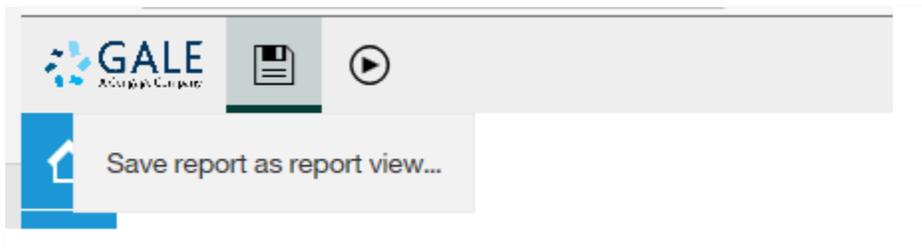
How to Save a Previously-Run Report

Add This Report is another version of Report View that allows you to save previously run-reports to your My Content folder. When accessed, the report you have run previously will automatically generate. Report views must always be saved in the **My Content** folder

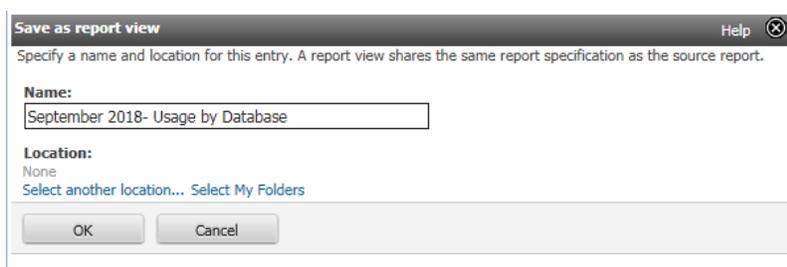
1. Run a report on demand (see How to Run a Report on Demand – Reports Folder)
2. Click on the **Add This Report** Icon.



3. Select **Save report as report view**.



4. Give the report view a meaningful name. Under **Location**, click the **Select My Folders** link

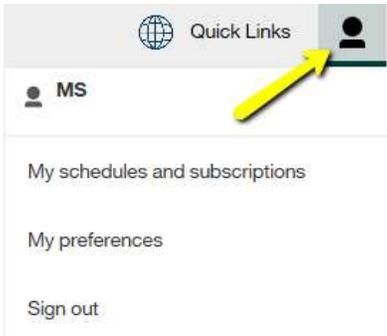


5. Click the Ok button to save the report view and return to the main window.

How to View and Maintain Current Schedules

My schedules and subscriptions enables views and modify *existing* schedule. If you would like to create a new schedule, please see [How to Schedule a Report to Run Recurrently](#).

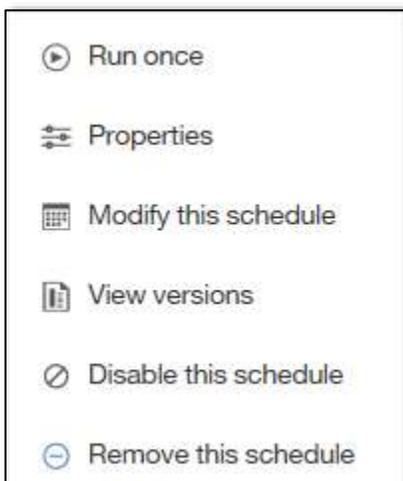
1. Select the Profile icon in the top right corner of the Usage Portal. Select **My Schedules and Subscriptions**.



2. Select the **More Options** by clicking on the ellipsis next to the schedule.



3. Options include Modify this schedule, disable (or enable schedules) and more.



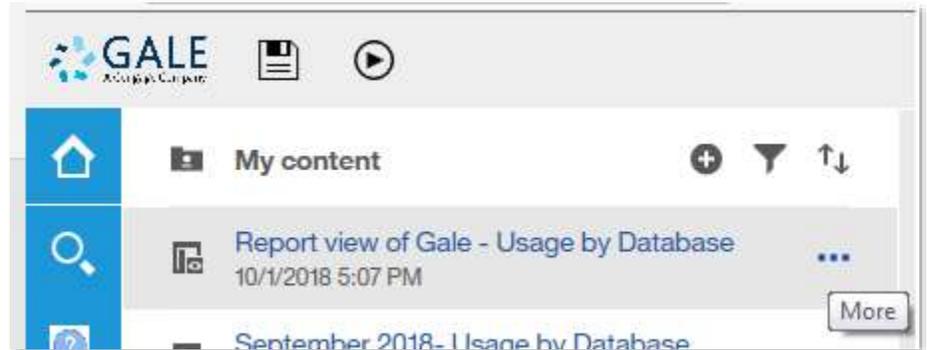
How to Save Favorite Prompt Values and Run Reports

Prompt values can be viewed and entered through the Report Criteria Selection Page before running a report on-demand. If you have favorite prompt values, saving prompt values to a Report View can enable reports to run by bypassing the Report Criteria Selection Page. Prompt values can also be saved to scheduled report views.

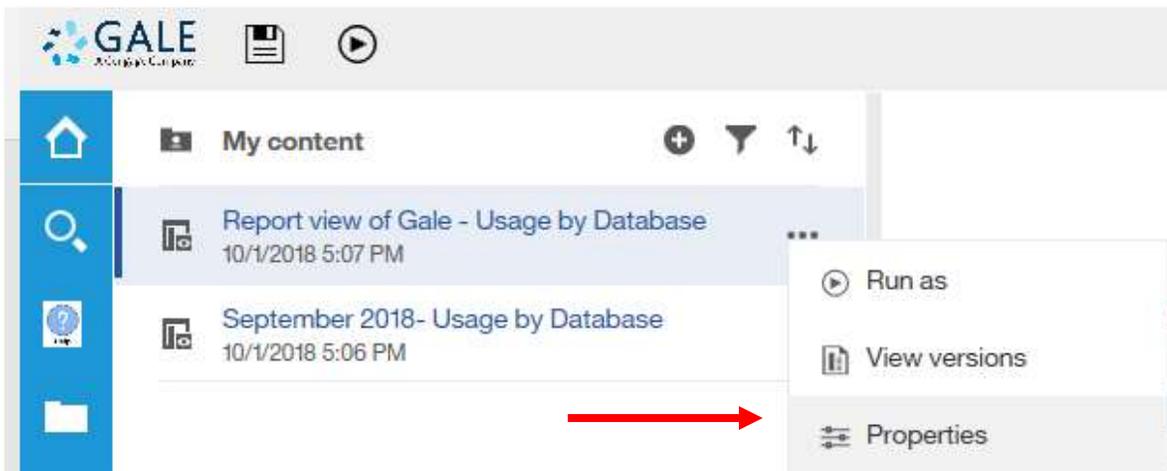
1. If you haven't already done so, first, create a report view of the desired report as described in

How to Create a Report View

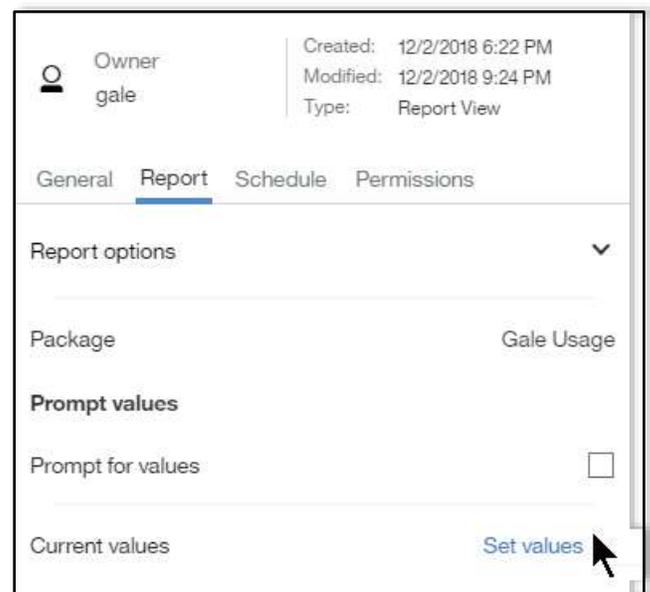
2. Locate the desired report in your **My Content** folder. Hover over the desired report. An ellipsis icon will be visible for More Options.
3. Click the More Options through **ellipses icon**.



4. Click on **Properties** in the More Options Menu.



5. Under the Report tab, click **Set Values**



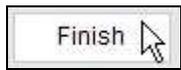
6. Under **Current Values**, click **Set** to launch the Report Criteria Selection Page to save your favorite prompt values.



7. The Report Selection Criteria page give you the option to customize the date range and other details of the report (a complete list of prompts can be found at the end of this guide).

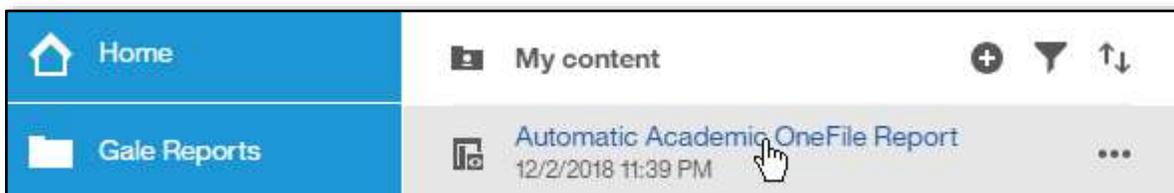
Use the available prompts to configure the report as desired, or do nothing to accept the default values.

8. Click the **Finish** button. The Report View will include all saved Prompt Values.



9. Locate the **Report View** with saved prompt values from the **My Content** folder.

10. Click on the Report View name to run the report automatically without being prompted or viewing the **Report Selection** . *Report prompts can also be saved for scheduled reports.*



Common Report Prompts

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

Date Selection prompt

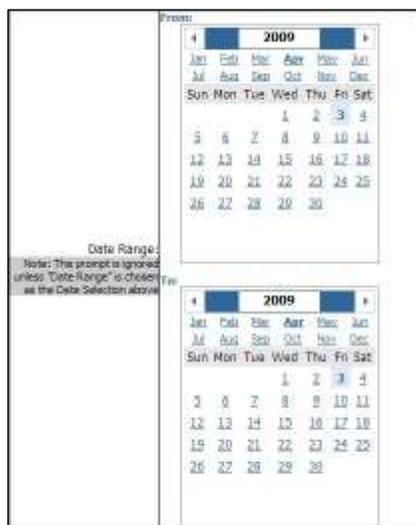


This allows you to run the report for a relative date range (ex: all of **Last Month**), or you can select **Date Range** which allows you to use the **Date Range** prompt to select a specific date range.

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

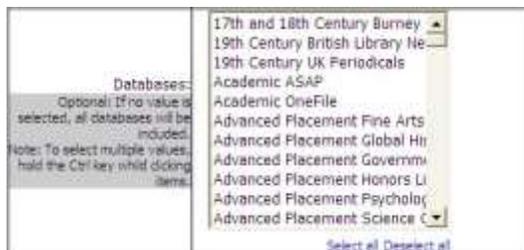
The top of the Date Selection prompt shows you the date range for which data is currently available. There is typically a two or three-day delay before data will be available (ex: on April 6, you should be able to see data up to and including April 4).

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.

- 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.*

Libraries prompt

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

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

This lists the available libraries.

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

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

Locations prompt

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

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

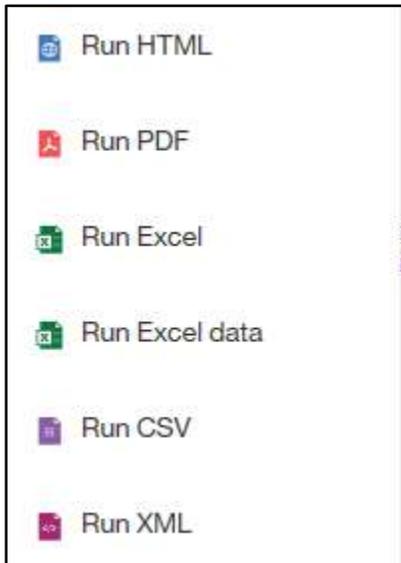
This lists the available locations.

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

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

Report Format – Default Output Type

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



Browser Requirements

The Gale Usage Reports Portal is hosted on the IBM application Cognos. Cognos supports major browsers Internet Explorer, Firefox and Chrome. The Gale Usage Reports portal is not recommended for use in Microsoft Edge and Safari.

If you have any questions, please contact Gale's Technical Support at Gale.TechnicalSupport@cengage.com.