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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.
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.
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.
Select the schedule frequency.

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Monthly</th>
</tr>
</thead>
</table>

Select the report format.

Select the schedule frequency. For monthly reports, enter a few days into the month to ensure the entire prior month’s usage is delivered.

Select the report format.

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

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

This lists the available libraries.

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

After selecting the desired libraries, click the Finish button.

**Locations prompt**

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

This lists the available locations.

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

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

- Run HTML
- Run PDF
- Run Excel
- Run Excel data
- Run CSV
- Run XML

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.TechncialSupport@cengage.com.