

GALE ANALYTICS TIPS

How to Run a Report in Community Insights

Use these **step-by-step instructions** to run reports in *Gale Analytics: Community Insights*

1. Sign into Gale Analytics and click on **Collections** on the left-hand side, then click **Community Insights**, click **Community Insights** again, and then click the blue **Run** button.
2. Insert your report/job name at the top of the page. This is optional.
3. Enter your library's information: Name, address, city, state, zip. (The parameters file option is explained in a later step and is only used when uploading a parameters file from a previous run.)
4. Upload your patron file: Match the street address, city, state, zip to the columns in your file. Then match last active date, match checkouts, and then email address. Keep the "Allow Blank Dates" box checked unless you want to disregard all records with no checkout dates.

Patron File

Browse to patron file

Map only the Address field if the address is contained in one field, otherwise map the individual address fields. Any fields not being used can be left blank or select "Select a Field."

Street Address

Suite

City

State

Zip

Optionally, map the Last Active Date, Checkouts, and Email Address fields

Last Active Date

Allow Blank Dates

If you map a date field but don't want blank dates to be viewed as errors, check the box "Allow Blank Dates" and blank dates will flow through to the dashboard. Blank dates in the dashboard will not be able to be filtered out by date.

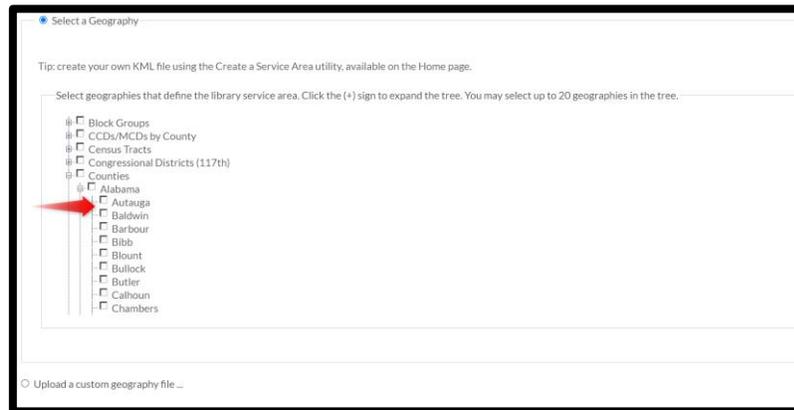
Checkouts

Email Address

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5. Select a geography using the geography tree or choose to upload a custom geography file. If you are using the geography tree, make sure to click the + symbol to drill down to your selected geography. ONLY check the box once you have drilled down as far as you can.



6. Output parameters file: Check this box if you'd like to upload a file that has saved all your selections. This will allow you to bypass the previous steps in the future by simply uploading one file. Think of this as a future shortcut.

7. Branches Shapes Upload: Only use this if you have a KML file that outlines all your branch geographies. This will allow you to see your different branch geographies on the map and filter for each. If you do not have a Branches file, then simply skip this step.

8. Tableau Output: Type the name you'd like to use for your Tableau Dashboard and leave **Output as Tableau Packaged Workbook (.twbx) file** selected.

9. Click **Run**. Depending on the size of your file, it will take between 20 seconds to several minutes.

10. From here, you can download various reports – the Tableau Dashboard (.twbx), the Executive Summary, Parameters File, Error Report, etc. To read the .twbx file you will need [Tableau Reader](#).

