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Agenda

- **Voyager Analyzer Logistics**
- **Analyzer Who’s Who**
  - Profiles
  - User Levels of Access
- **Voyager Analyzer Portal**
  - Navigation
  - Pages
  - Folders
  - Reports & Report Views
- **Query Studio**
  - **Analyzer Structure**
    - Namespace
    - Presentation Layer
    - Packages
    - Reports
  - Workspace
  - Functionality
  - Mechanics
- **Reporting Exercises**
  - View, Create, Run, Open, & Edit Options

Introduction

- **Training Goal:**
- Provide an understanding of the mechanics of Query Studio, including:
  - The Presentation Layer
  - Creating new reports
  - Query Studio Mechanics
Introduction

• **Training Participants:**
  – This training session is designed for the library staff members who will be creating and maintaining reports.

• **Training Environment**
  – A standard training database, connected to a Voyager Analyzer installation
  – When doing hands-on exercises all users will be working in the same Analyzer installation
  – Users will have a unique user ID and password, and will be storing information in separate folders
Analyzer Who’s Who

- Voyager System Administration

- Functional access
  - Viewer
  - Library
  - Technical

NOTE:
Package access is based on Voyager modules in use.
Query Studio

- Casual or novice users use Query Studio to create self-serve reports that answer simple business questions.
  - Author basic reports
  - Change the report layout
  - Filter and sort data
  - Add formatting
  - Create charts

Working with Reports

- After a report is published to the portal, users can:
  - view, run, or open it
  - view various formats
  - distribute
  - set run options
  - edit with Report Studio
  - schedule runs
  - view run history
Query Studio: Presentation Layer

- Created from Data Elements in the Voyager Database
  - Namespaces
    - grouped, unique data elements
  - Query Subjects
    - equivalent to database tables
  - Query Items
    - equivalent to database table fields
  - Query Item Folders
    - container for query subjects and query items

Namespace Examples:
- Charge Transactions
- Fines and Fees

Query Subject Examples:
- Active Holds and Recalls
- Archived Holds and Recalls

Query Item Folder Examples:
- Patron Details
- Filters
Query Studio: Presentation Layer

- **Query Item Examples:**
  - **Attribute**
    - Pick Up Location Name
    - Type
  - **Identifier**
    - Hold Recall ID
    - Patron ID
  - **Measure**
    - Available Notice Count
    - Request Item Count

Query Studio: Workspace

Select and insert fields from the tree to fill the report. Press control drag and drop items into the report.
Query Studio: Exercise 1

- Part A: Opening Query Studio
  - Goal 1: Ability to navigate the Query Studio workspace.
  - Goal 2: Ability to recognize parts of the presentation layer.

Query Studio: Exercise 1, cont.

- Part B: Adding Query Items
  - Goal 1: Understanding the basic mechanics of Query Studio.
  - Goal 2: Develop query subject/query item discretion.
Query Studio: Exercise 1, cont.

- Part C: Filter and Sort
  - Goal 1: Understanding the basic “edit data” functions.
  - Goal 2: Understanding the basic mechanics of Query Studio.

Query Studio: Mechanics

- Three methods for adding items to report:
  - Drag-and-drop
  - Double click
  - Select and Insert

- Three methods for running the report in Query Studio:
  - All data
  - Limited data
  - No data

What impacts RUN DATA OPTIONS:
- Library size
- Server size
- Network activity
- Size of database
- Stand-alone server
Query Studio: Exercise 2

- Goal: Increase knowledge of query studio functionality.

- This exercise repeats some of the same functions from Exercise 1.

Query Studio: Exercise 3

- Goal 1: Learn more functionality.
- Goal 2: Identify report views.
  - Report views should be created when sharing reports.
Query Studio: Edit Data Functions

• **Basic Functions:**
  - Filter
  - Sort
  - Summarize

Query Studio: Mechanics

- Query Studio automatically suppresses duplicates.
- Query Studio also automatically summarizes detail values.
- Query Studio also automatically generates footer summaries for measures.
Query Studio: Exercise 4

- Goal 1: Learn more functionality.
- Goal 2: Practice functionality from training session.

Tips for Using Query Studio

- Turn off advanced options.
- Create a report against the traindb and run against yyydb (production).
- Use “Run with no data” function.
End of Training

• Session Summary
  - Ran pre-packaged report
  - Created reports and report views
  - Changed document output format
  - Used basic filter to eliminate unwanted data from a report
  - Used sort to order data
  - Changed QS functionality—summarize

• Questions
• Contact Project Manager

Thank You!