Voyager Analyzer 1.0
Query Studio – Part 2

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Introduction

• **Training Goal:**
  – To practice additional Query Studio mechanics and generate various reports using instructor-defined criteria.

• **Training Pre-requisites:**
  – Analyzer Orientation
  – Query Studio – Part 1
Introduction

• Training Environment
  – Standard Voyager Analyzer installation
  – Standard training database

Agenda

• Review
  – Analyzer Structure
  – Reports and Report Views

• Query Studio
  – Sort and Filter
  – Group and Section
  – Summarize and Calculate
  – Format Options

• Layout Modifications
  – Groups and Sections
  – Charts
  – Crosstabs
  – Conditional Styles
  – Visual Styles (borders, font, etc.)

• Best Practices
  – Editing Reports
  – Management
    • Naming standards
    • Storage standards
    • Publishing
    • Report Integrity

• Publishing

• Report Integrity
Review

- **Namespace**
  - database name

- **Model**
  - objects that represent the database

- **Packages**
  - subsets of data from the model

- **Reports**
  - objects created / edited by Query Studio or Report Studio

- **Report Views**
  - editable references to a report

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Review

**Presentation Layer**

- **Namespaces**
  - grouped, unique data elements

- **Query Item Folders**
  - container for query subjects and query items

- **Query Subjects**
  - equivalent to database tables

- **Query Items**
  - equivalent to database table fields
Preparing for Exercise 1

- **Group**
  - reorders the rows
  - suppresses the display of duplicates
  - shows footer values as appropriate

- **Section**
  - shows the value of a selected report item as the heading of a section

Exercise 1: Expenditures

- As the Acquisitions Librarian, you want to know how much money was invoiced in the last `<date range>`. Your report will include vendor names, the invoice status date, and the invoice amount in the base currency. The report should have a **grand total** and be **grouped by vendor**.

- Save As:
  - Exercise1 – Expenditures by Date Range
Query Studio Functions – Part 1

- Editing Data
  - Sort
  - Filter
  - Summarize
  - Calculate
  - Format

<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Invoice Status</th>
<th>Invoice Status Date</th>
<th>Invoice Amount (Base Currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baker &amp; Taylor</td>
<td>Approved</td>
<td>Feb 6, 2019 11:56:56 AM</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
<td>Feb 6, 2019 12:17:25 PM</td>
<td>55</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
<td>Feb 6, 2019 1:57:11 PM</td>
<td>78.8</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
<td>Feb 6, 2019 2:00:15 PM</td>
<td>59.75</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
<td>Feb 6, 2019 2:16:43 PM</td>
<td>84.5</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
<td>Feb 6, 2019 2:29:20 PM</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>Feb 6, 2019 11:00:12 AM</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>Feb 6, 2019 12:15:12 PM</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>Feb 6, 2019 1:55:41 PM</td>
<td>90.95</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>Feb 6, 2019 2:00:30 PM</td>
<td>35.9</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>Feb 6, 2019 2:12:49 PM</td>
<td>56.96</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>Feb 6, 2019 2:26:42 PM</td>
<td>0</td>
</tr>
</tbody>
</table>

| EBSCO        | Approved      | Feb 6, 2019 2:01:45 PM  | 500                            |
|             | Approved      | Feb 7, 2019 6:24:17 PM  | 85                             |
|             | Pending       | Feb 6, 2019 3:31:08 PM  | 85                             |

| Summary      |                |                     | 1,415.08                       |
Query Studio: Edit Data – Sort

- **Usage**
  - Ascending
  - Descending
  - Numerical
- **When grouped:**
  - detail
  - summary

- **Mechanics of Sort**
  - Remove using the "Don’t Sort" option from Edit Data > Sort
- **When deleting a column,** retain sorting but remove data from view

Query Studio: Edit Data – Filter

- **Usage**
  - specify data subset
  - eliminate unwanted data
- **Methods**
  - Pick values from a list
  - Search for values
  - Type in values

- **Condition**
  - Show only the following
  - Do NOT show the following
Query Studio: Edit Data – Filter, cont.

- Missing Values
  - Include missing values
  - do not include missing values
  - only see missing values

- Prompt every time the report runs
  - optional feature
  - increase usability and flexibility

Query Studio: Edit Data – Filter, cont.

- Complex filters
  - combine 2 or more filters using Boolean operators
  - apply a filter at detail and/or summary levels
  - delete a filtered column but keep the filter itself
Exercise 2: Applying Filters

- **Objective:**
  - Apply filters using multiple methods and columns

- **Goals:**
  - Create five reports using the same data with different filters.
  - Understand filter functionality.
  - Understand report writing progression.

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Exercise 2: Applying Filters

- Create a shelf list report with the following:
  - MFHD Location Code, Call No Type Description, Normalized Call No, Display Call No, Brief Title, Author, Item Status Name, Item Barcode
  - Save as: Exercise 2a – Shelf List Base Report
Exercise 2b-c: Applying Filters

- 2b
  - Sort on Normalized Call Number and remove the column.
  - Save As: Exercise 2b – Shelf List Sorted by Norm. Call No

- 2c
  - Filter (use Pick values from a list) on MFHD Location Code
  - Save As: Exercise 2c – Shelf List by Holding Location Code

Exercise 2d-e: Applying Filters

- 2d
  - Filter (use Type in values) on Item Status Name
  - Save As: Exercise 2d – Shelf List by Holding Location Code & Item Status Name

- 2e
  - Filter on Item Barcode
  - Save As: Exercise 2e – Shelf List of Items w/o Barcodes
Query Studio: Edit Data – Summarize

• **Usage:**
  - Add or remove footer values
  - Change how details are calculated

• **Mechanics:**
  - Apply to detail or summary
  - Data type dependent
  - No visible indication that summary is in effect

Query Studio: Edit Data – Calculate

• **Usage:**
  - Create one or more report items from existing data

• **Functions:**
  - Arithmetic
  - Percentage
  - Analytic

• **Mechanics:**
  - Cannot edit a calculation
  - Results are not stored in database
  - Results are always based on current data
Exercise 3: Summarize & Calculate

- **Objective:**
  - Apply and edit summarization lines.
  - Create calculations for data analysis.

- **Goals:**
  - Understand functionality: summarize and calculate.
  - Develop presentation layer discretion.
  - Verification of compiled data.

Exercise 3a: Summarize & Calculate

- Create a fiscal “spreadsheet” report with the following:
  - Fiscal Period Name, Ledger Name, Fund Category, Parent Fund Name, Fund Name, Current Allocation, Commitments, Pending Commits, Expenditures, Pending Expends, Free Balance

- **Save As:** Exercise 3a – Ledger/Fund Base Report
Exercise 3b: Summarize & Calculate

• 3b
  – Review the existing summary lines.
  – Group Fiscal Period Name, Ledger Name, and Parent Fund Name.
  – Filter (and always prompt) on
  – Fund Category: Allocated.
  – Fiscal Period Name: <attendee’s choice>
  – Ledger Name: <attendee’s choice>

• Save As: Exercise 3b – Budget Summary

Exercise 3c: Summarize & Calculate

• 3c
  – Create a percent calculation between Current Allocation and Free Balance.

• Save As: Exercise 3c – Fund Status
**Exercise 3d: Summarize & Calculate**

- Create a count MFHDs by call number type report with the following:
  - Call Number Type Description
  - MFHD ID
  - Group by Call Number Type Description.
  - Summarize MFHD ID

- Save As: Exercise 3d – Total MFHDs by Call Number Type

**Exercise 3e: Summarize & Calculate**

- Create an average historical charges report with the following:
  - Brief Title
  - Historical Charges

- Summarize the historical charges to produce an average.

- Save As: Exercise 3e – Average Historical Charge.
**Editing Reports**

- In the portal, reports can be opened in Query Studio two ways:
  - click a report title that has a left-pointed Query Studio pen icon
  - click the Query Studio icon in the action column

**Query Studio: Edit Data – Format**

- Change how data in fields are displayed.
  - Text
  - Number
  - Currency
  - Date
  - Time
Exercise 4: Format

- Objective:
  - Apply visual changes to existing reports.

- Goals:
  - Understand functionality.
  - “ Beautify” results.
  - Increase “readability.”

Add Currency formatting:
- Exercise 1 – Expenditures by Date Range.
- Save the report as Exercise 4a Format.

- Exercise 3 – Budget Summary.
- Save the report as Exercise 4b Format.
Query Studio Functions – Part 2

- Layout Modifications
  - Groups and Sections
  - Charts
  - Crosstabs
  - Conditional Styles
  - Visual Styles (borders, font, etc)

QS: Layout Modifications: Charts & Crosstabs

- Crosstab reports show a measure at the intersection of each row and column.

- List reports show data in a linear fashion.
**Exercise 5: Charts & Crosstabs**

- **Objective:**
  - Apply alternate visual representation to the report.

- **Goals:**
  - Understand the report audience
  - Report purposing
  - Report recognition
  - Report to chart compatibility
Exercise 5: Charts and Crosstabs

- Create a fines/fees by transaction location and patron group report. Include the following:
  - Patron Group Name
  - Fines/Fees Location Name
  - Fines/Fees Amount
  - Change the report from a list to a crosstab.

- Save As: Exercise 5a — Charts and Crosstabs: Fines/Fees Totals by Patron Group (Crosstab)

Exercise 5: Charts & Crosstabs

- Create a pie chart of “Exercise 3 – Total MFHDs by Call Number Type.”

- Save As: Exercise 5b — Charts and Crosstabs: Total MFHD Count (Chart)
**QS: Layout Modifications: Appearance**

- Make reports easier to understand and interpret without changing the underlying data. Query Studio allows the following:
  - changing the title
  - formatting text, data, and borders
  - collapsing or expanding a report
  - reordering report items
  - changing the heading name
  - swapping rows and columns
  - controlling the number of rows per page
  - setting page breaks
  - highlighting key information

**QS: Layout Modifications – Conditional Styles**

- Define conditional styles to highlight key information in a report. You can use conditional styles with numeric data, text data, and date values.
Exercise 6 — Conditional Styles

• Apply conditional styles to Exercise 3 – Fund Status.
• Save as Exercise 6 – Conditional Styles.

Best Practices

- Create a policy for editing.
- Make sure staff members know the policy.
- Copy existing reports.
- Modify the copy.
Management: Naming Standards

- Establish a convention.
- Include filter and sort details.
- Include author of report.
- Utilize description and screen tip space.

Management: Storage Standards

- Works in progress should be stored in "My Folders."
- Create a report view of reports to be shared.
- Create a "Local Reports" subfolder in Public Folders
  > PACKAGE_NAME > xxxdb
Management: Publishing

- Know your audience.
- Know your branding needs.
- Start in Query Studio for report creation. Use Report Studio for layout and “publishing” needs.
- Considering publishing usage (e.g. marketing)

Management: Report Integrity

- Know your data.
- Know Query Studio functionality.
- Report sampling is critical.
Follow Up Exercises

- Open “Exercise 2 – Shelf List of Items w/o Barcodes.” Remove the Item Barcode column but keep the filter.

- Open “Exercise 2 – Shelf List by Holding Location.”
  - Create sections for the holding location column.

- Open “Exercise 2 – Shelf List Base Report.”
  - Modify the report to fit your need...

End of Training

- Any questions?
- Contact Project Manager
Thank You!

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