Voyager Analyzer 1.0
Report Studio – Part 1
Instructor: Jackie Golden

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Introduction

- **About Analyzer:**
  - Analyzer Defined
    - Web-based reporting and querying tool
    - Generates statistics used to make data-driven decisions
  - Analyzer Modules
    - Query Studio
    - Report Studio

- **Training Participants:**
  - Library staff members who will be modifying basic reports
  - Library staff members who will be creating complex reports

"…once created or edited in Report Studio, always edited in Report Studio…"
Introduction

• Knowledge Requirements

  - Query Studio class recommended
  - Basic understanding of the role of SQL in general report writing

  • Oracle SQL
  • Oracle by Example (Third Edition)—Alice Rischert

Introduction

• Training Environment

  - Demonstration
    • Standard Voyager Analyzer Installation
    • Customer Training Database
  
  - Hands-on Exercises
    • Standard Voyager Analyzer installation
    • Customer Training
Introduction

• Training Goals:
  – Demonstrate the foundational mechanics needed to create simple to complex reports using Report Studio
  – Jumpstart a hands-on skill in the mechanics of Report Studio
    • Identify the primary parts of the Report Studio interface
    • Navigate throughout the layers
    • Create a variety of reports that incorporate different report objects

Agenda

• Studio Comparison
  – Query Studio
  – Report Studio

• User interface elements
  – Panes
  – Bars
  – Workspace

• Filters
  – Simple Prompt
  – Hardcoded
  – Single & Multiple Select

• Simple Report objects

• Converting a List Report to Other Report Types
Query Studio vs. Report Studio

• Query Studio (QS)
  – A very powerful solution
  – Where majority of report writing occurs
  – Single report page
  – Single query
  – One- and two-click functions
  – Lower learning curve

• Report Studio (RS)
  – Supplement to QS
  – Multiple report pages
  – Multiple queries
  – Multi-layer functionality
  – Complex functions
  – Higher learning curve

Report Studio

• Things to look out for...
  – Technical Author access
  – Requires Internet Explorer
  – Must allow pop-ups
  – Loads in separate window
  – Does not resemble a browser
Packages

- Report Studio is designed to validate the report specification against the current package.

Validation:

- confirms correct package for data
- verifies the package model
- updates the report specification if needed
Working with Packages

• Writers can change packages prior to adding data objects to a report.

Exercise 1 – Changing Packages

• Open the Cataloging package with Report Studio, and then change to the Circulation and Call Slip package.
Report Studio: Interface

- Panes
  - Insertable Objects
  - Properties

- Bars
  - Pages
  - Query
  - Condition

- Work Space

Interface: Insertable Objects

- Three tabs
  - Source
  - Data
  - Toolbox

- Drag objects to work space
Exercise 2 – New List Report

- Creating the report:
  - Ordered Titles by Vendor name for a date range
  - Use PO Line Item Copy for the report details

- Save as Exercise 2a – Ordered Titles by Vendor Name

Filters in Report Studio

- Methods
  - Hard code
  - Prompt
    - =?TEXT?

- Features
  - Single Select
  - Multiple Select
  - Validate

- Information
  - Tips
  - Errors
Exercise 2b – New List Report

• Creating the filter:
  – Use Expression Builder
  – Use the prompt “convention”
  – Validate

• Save as Exercise 2b – Ordered Titles by Vendor Name (Date Prompt)

Exercise 3 – Applying Filters

• Create a Shelf List base report.
  – MFHD location code, call number type description, normalized call number, display call number, brief title, author, item status name, and item barcode.

• Save As: Exercise 3a – RS – Shelf List Base Report (Various Filters)
Report Objects

- Object Types
- Purpose

Exercise 4 – Toolbox Tab (Report Objects)

- List
- Time
- Hyperlink
- Text

Save as Exercise 4a – Report Objects
Exercise 4 – Toolbox: Query Calculations

• Using Report Studio, create a report that will reflect the following:
  – Circulation charges count by month and year
  – Save as Exercise 4b – Count by Month and Year

Exercise 4 – Converting a List to a Different Report Type

• Using Exercise 4b, convert the list report to a crosstab report type.

• Save as Exercise 4c – Converting a List to a Different Report Type
Exercise 5— RS Assessment

- Using Report Studio, create a report that will reflect the following:
  - Serials not received by date and vendor
  - Save as Exercise 5 – Serials Not Received by Date and Vendor

End of Training

- Session Summary
- Any questions?
- Contact Project Manager