



Welcome to
EMUG 2017
BOSTON



www.ariessys.com



Editorial Manager[®]



ProduXion Manager[®]



Enterprise Analytics Reporting

Melanie Cotterell, Client Services Manager,
mcotterell@ariessys.com

Introduction to EAR

<http://bit.ly/introreporting>

Introduction to EAR

- Custom Reports and General Data Export
- EAR Main Menu
- Running Standard Reports
- Icons and Tool Bars
- Editing and Creating Reports
- Data Sources
- Fields
- Summary Tab
- Charts and Gauges
- Sharing Reports
- Styling
- Filters
- Email and Scheduling Capabilities

Custom Reports and General Data Export

Report Tools

[Enterprise Analytics Reporting](#) ←
[General Data Export](#) ←
[Custom Report](#) ←
[Search/Manage Conference Submissions](#)

- General Data Export – Source Tables from EM that store all the data. E.g. People Table, Address Table, Document Table, Article Types Table.
- Custom Reports - Build your own reports using pre defined Views. E.g. People and Address View.
- EAR is the perfect marriage between the Tables and Views.
- Reports come in four possible parts; Summary, Detail, Charts and Gauges.

EAR Main Menu

Enterprise Analytics Reporting

[Create Report](#)

Standard Reports

Editorial Reports

[Accept and Reject Decisions by Editor in selected timeframe](#)

[Accept and Reject Decisions in selected timeframe](#)

[Average Days to Decision by Editor](#)

Design

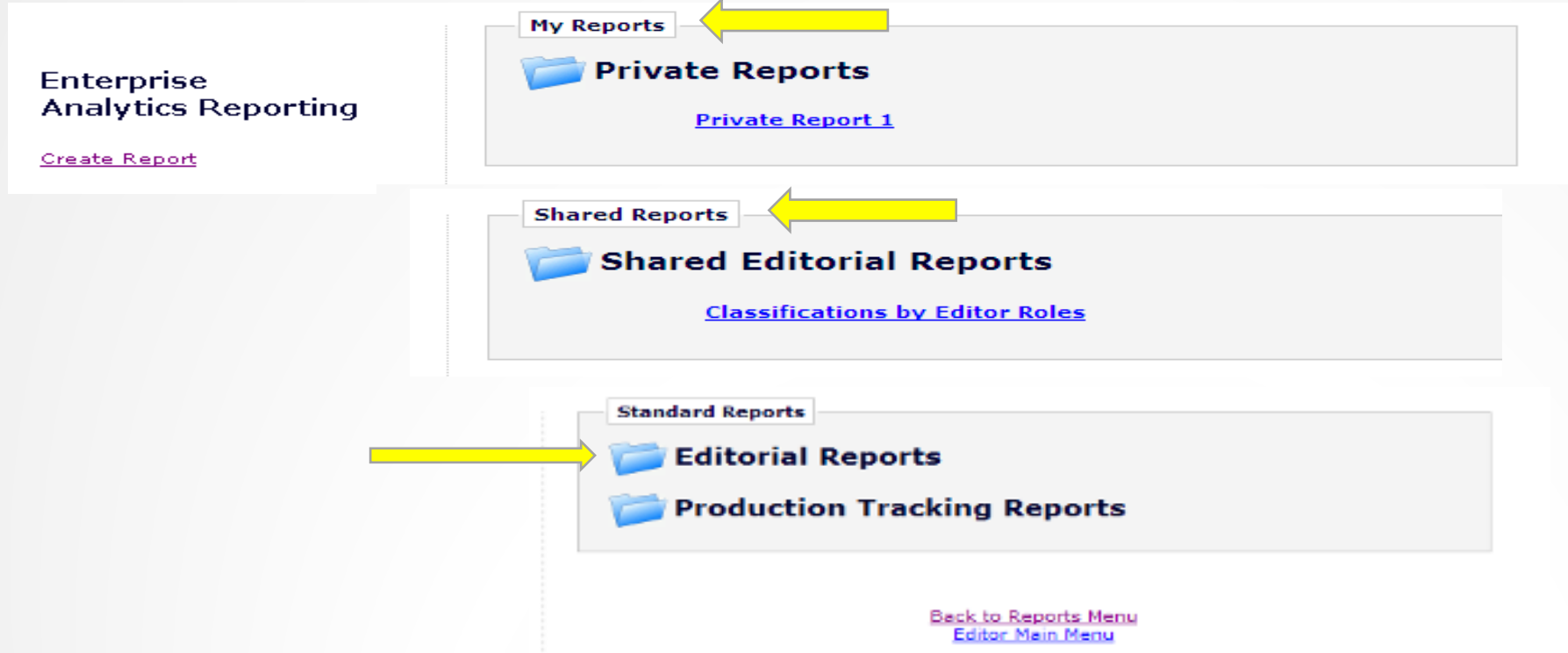
Production Tracking Reports

[Avg Days to Complete Production Tasks in selected timeframe](#)

[Submission Turnaround Times - Editorial and Production](#)

- Standard Editorial and Production EAR reports already set up.
- “Create Report” link for designing reports.
- Edit/Design ability for modifying existing reports, both custom and standard.

EAR Main Menu




- Saving reports creates new sections called My Reports/Shared Reports, depending on if they are shared with other users.
- My Reports section specific to logged in User.
- Can create own folder and report names, when saving reports.
- Clicking on the folder icons expands/contracts the list of reports.

Running Standard Reports

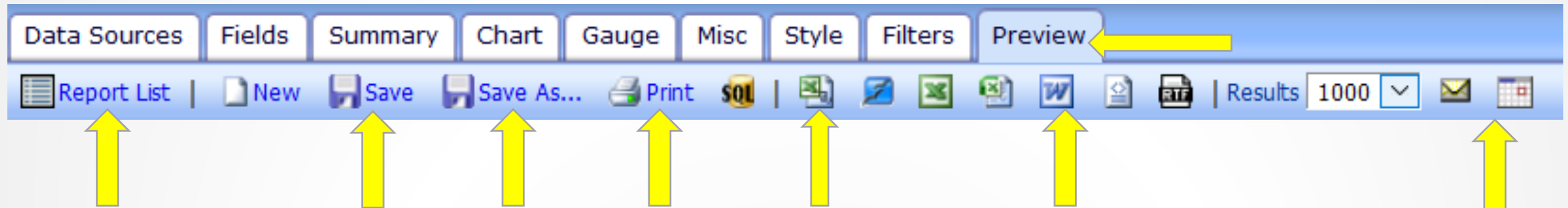
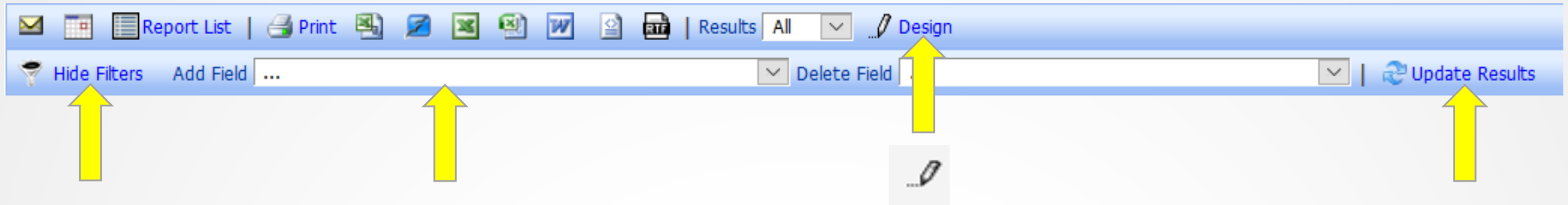
Standard Reports

Editorial Reports

-  Accept and Reject Decisions by Editor in selected timeframe
- Accept and Reject Decisions in selected timeframe
- Average Days to Decision by Editor
- Completed Reviews Detail Report
- Editor Submission Counts - All editors by Role
- Editor Submission Counts - Editors at End of Chain
- People and Classifications

- Click on report name to run it.
- Hover over report name to display the design (Pencil) icon.
- Can edit report and resave under preferred name.

Icons and Toolbars



- Toolbar when running reports, can edit, alter filters and update results.
- Toolbar when editing/designing reports, Tab style interface, preview option, save options, various export formats.
- Hover over icons will describe operation.
- Email and regular schedule delivery of reports – to be covered shortly!



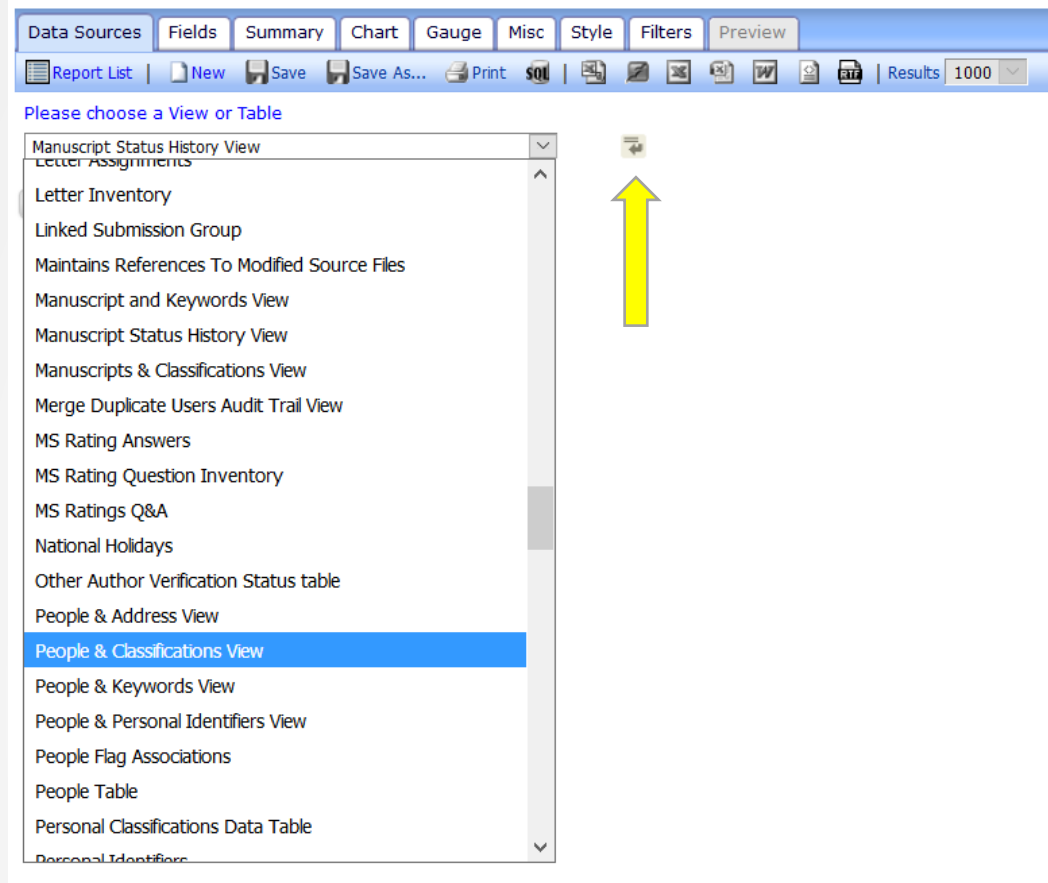
Editing and Creating Reports

Create Report



- Standard report gives you what you need? Only need a minor edit? Or create your own.
- Choose your data source(s) carefully, this will determine what fields you can see in your report.
- Fields in the data source drive everything else, output fields, summary report, charts and filters.
- Some data sources contain multiple entries per paper and revision so can look like EAR is giving duplicate results. E.g. Reviewer and Submissions View, gives an entry for each reviewer of a paper and each revision they have reviewed.
- Data sources worth noting: Manuscript Status History View and Document Table contain one entry per paper.
- People table and People and Address View, can put names to numbers! E.g. Who is People ID 3456...?
- Useful views have IDs converted, but configuration tables may be needed to convert some data. E.g. What is Section/Category ID 12...?

Choosing Data Sources



Selecting a Data Source is required.
Other tabs are optional.

- A new report will have no selection in the drop-down list. You can select any view or table listed.
- A report that you are editing will have one or more data sources already selected.
- Use the “add data source” icon to create a second row and choose another data source if required.

Joining Data Sources

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | [Icons]

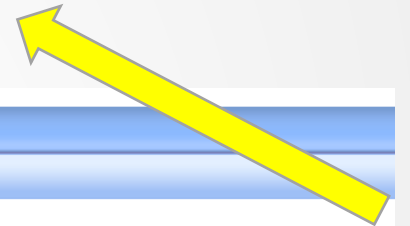
Please choose a View or Table

Manuscript Status History View

Continue to Fields

Inner (Direct) [Close] [Refresh] [Undo]

- ...
- Inner (Direct)
- Cross
- Left (First Exists)
- Right
- Full



Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | [Icons] | Results 1000

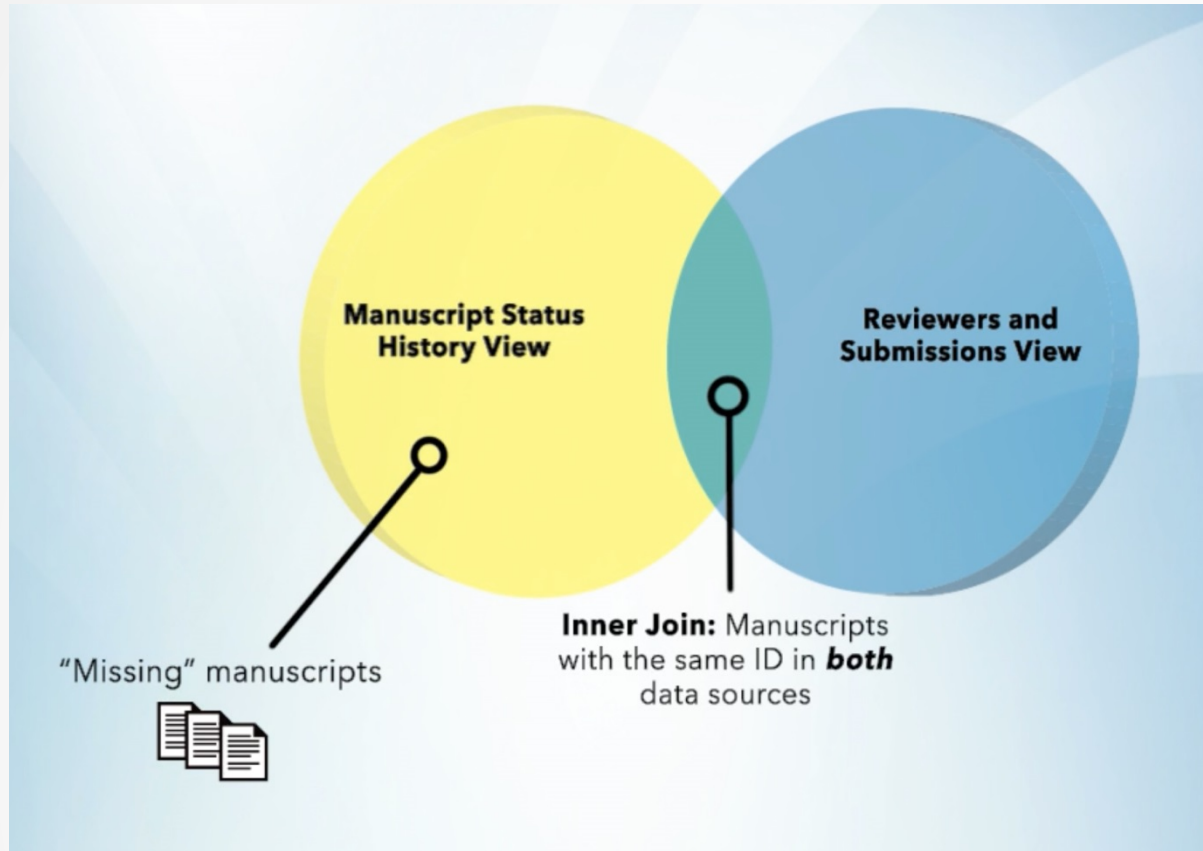
Please choose a View or Table

Manuscript Status History View

Reviewers & Submissions View . Unique Document ID = Manuscript Status History View . Unique Document ID

Continue to Fields

Joining Data Sources



Tips on joining fields

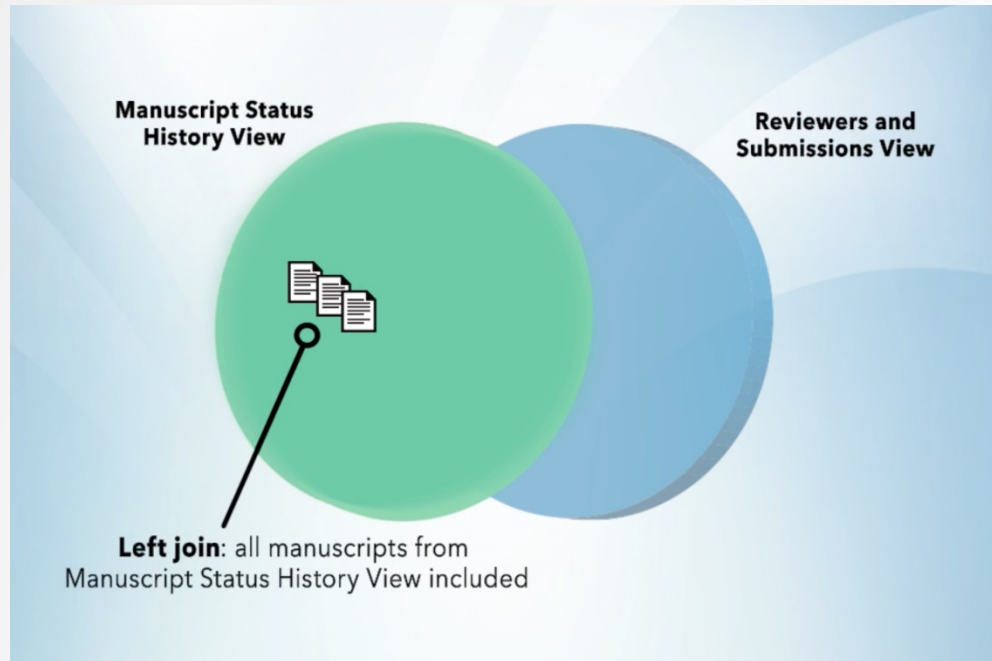
<http://www.ariessys.com/about/reporting-across-data-sources-using-joins-part-1/>

The default is inner join. Imagine two circles with an overlap in the middle inner part.

This would only show papers that meet criteria for both views. So if a paper has been submitted and is out for review then it would show here.

Manuscripts never sent for review would be missing

Joining Data Sources



Left join:

If you wanted to also show papers that have been submitted but not yet sent for review then choose left join making sure that Manuscript Status History view is the top view.

Left is right 😊

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | | | | | | | | | | Results 1000

Please choose a View or Table

Manuscript Status History View

Reviewers & Submissions View . Unique Document ID = Manuscript Status History View

Continue to Fields

Fields Tab

The screenshot shows the 'Fields Tab' in a reporting software interface. The top navigation bar includes tabs for 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below this is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and various file formats. A 'Results' dropdown is set to '1000'. The main area features a 'Records' input field and a table with columns: 'Field', 'Description', 'Sort VG', 'A', 'Function', and 'Format'. A single field is currently listed. Below the table are checkboxes for 'Add Subtotals' and three buttons: 'Quick Add', 'Add Pivot', and 'Continue to Summary'. A yellow arrow points to the 'Quick Add' button. On the right side, there are two rows of icons for deleting, moving, and configuring fields, with a red arrow pointing to the top row of icons.

- Fields tab allows selection of output fields.
- Fields are those available from selected Data Source(s).
- Fields selected here will appear on Detail Report.
- Advanced field settings to be covered in Advanced Sessions!
- Quick add option.

Fields Tab

The screenshot displays the 'Fields Tab' in a reporting application. The top navigation bar includes 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', and 'Misc'. Below this, there are buttons for 'Back', 'Report List', 'New', 'Save', and 'Save As...'. The main area is titled 'Please select the fields you'd like to add to your report.' and is divided into two columns of fields, each with a checkbox for selection.

Manuscript Status History View

- Actual Online Pub...
- Article Title
- Article Type
- Conference Name
- Conference Presen...
- Conference Presen...
- Conference Presen...
- Conference Session
- Conference Submis...
- Date Final Dispos...
- Date of First Dec...
- Days to Final Dec...
- Days to Final Dis...
- Days with Author
- Days with Editor
- Edit Submission S...
- Edit Submission S...
- Editorial Status
- Editorial Status ...

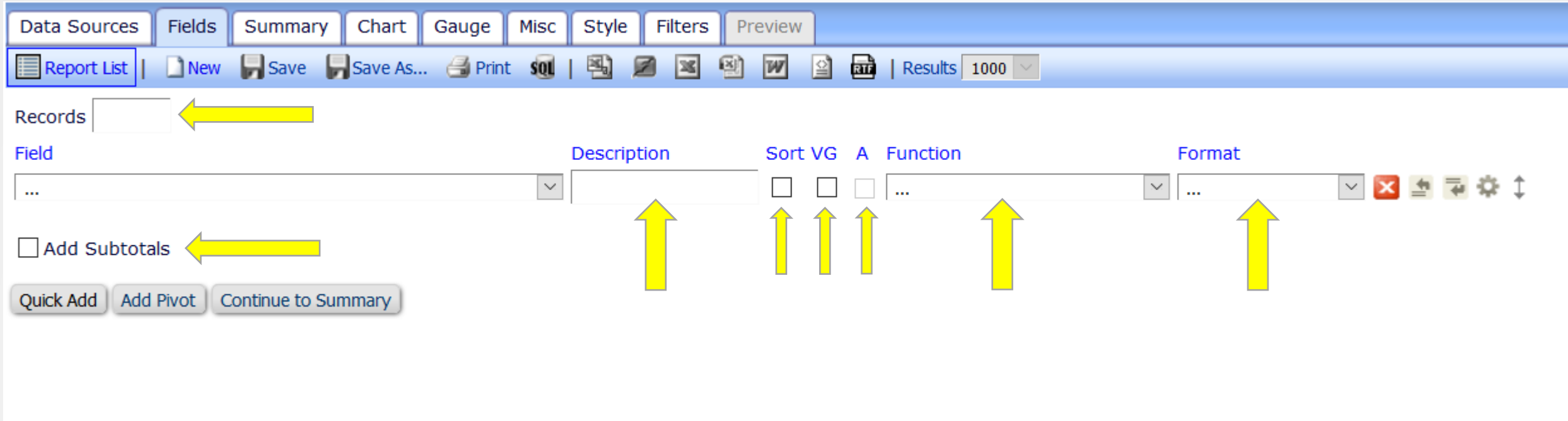
Reviewers & Submissions View

- Abstract
- Actual Online Pub...
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- Agree Date
- All Authors
- Alternate Reviewer
- Alternate Reviewe...
- Article Title
- Article Type
- Author First Name
- Author Last Name
- Author Middle Name
- City
- Conference Name
- Conference Presen...
- Conference Presen...
- Manuscript Notes
- Manuscript Number
- Manuscript Rating
- Number of days re...
- Number of Days Re...
- Number of Invitat...
- Number of Reminde...
- Number of Reminde...
- Number of Require...
- Page Range
- People Notes
- Person is a Board...
- Person is Forbidd...
- Position
- Preferred Method ...
- Primary Phone Number
- Primary/Alternate...
- Print Pages of Ar...
- Production Notes

On the left side, there is a 'Records' field with a dropdown menu showing 'Reviewer People ID'. Below it are buttons for 'Quick Add', 'Add Pivot', and 'Continue to Summary'.

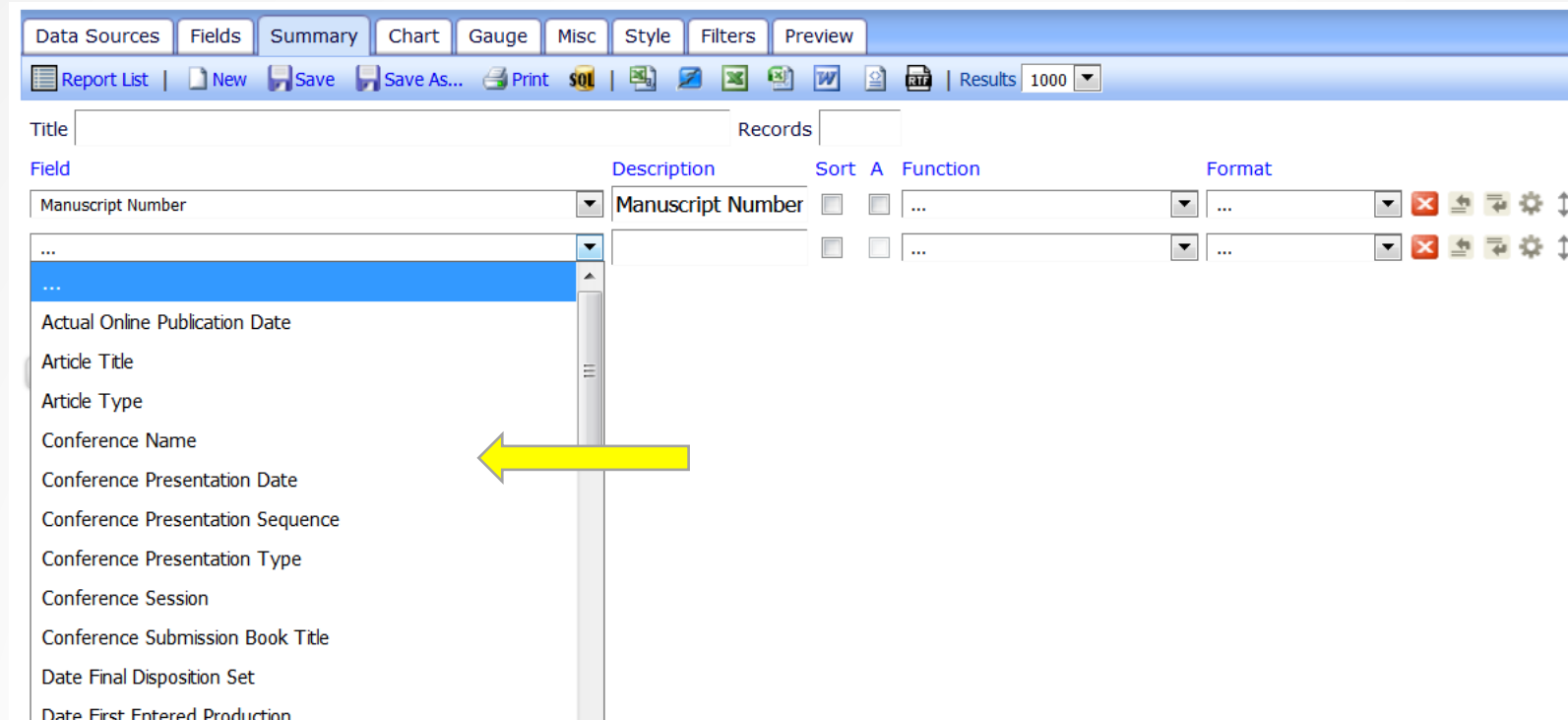
- All Fields shown from selected Data Source(s).
- Hovering on truncated descriptions shows full text.

Fields Tab



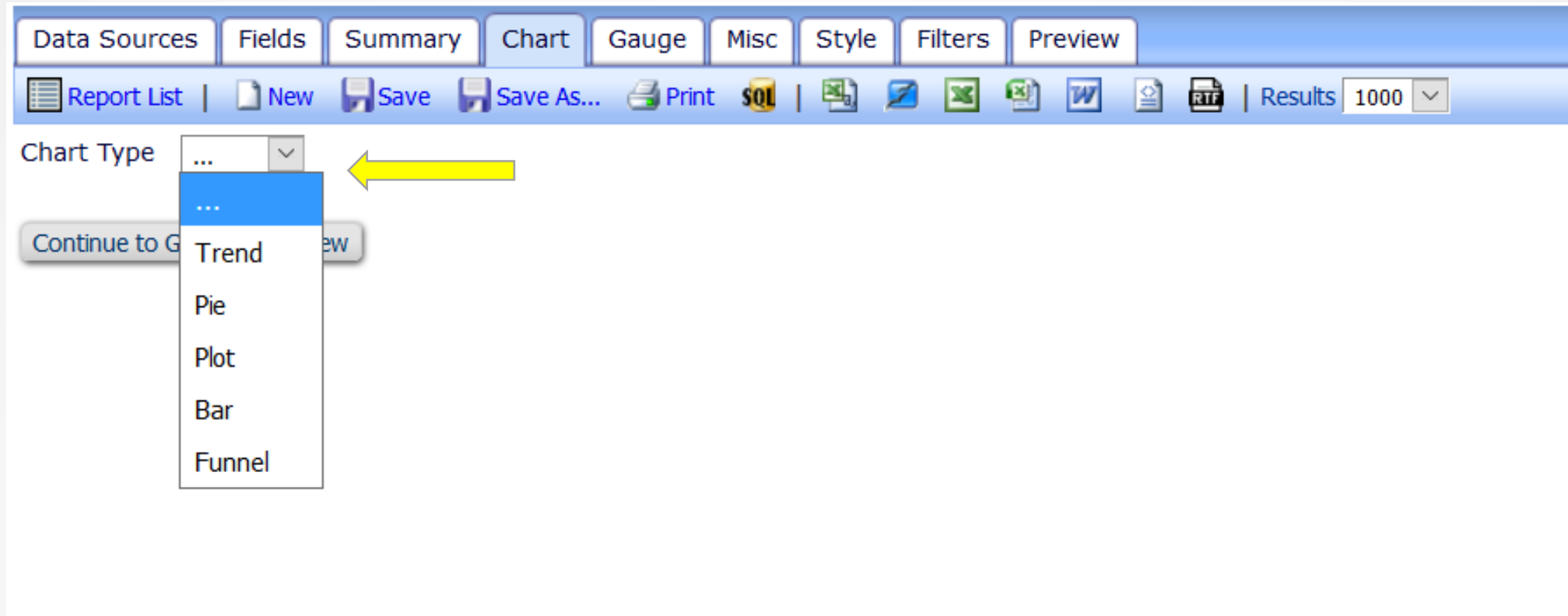
- Can limit number of records returned.
- Enter your own description for the fields.
- Sorting, visually grouping and arithmetic operations available.
- Functions are available e.g. average, count, convert dates to days old.
- Formats can be applied to fields e.g. convert numbers to percentages.
- Subtotals can be added to numerical fields.

Summary Tab



- The Summary tab also shows all the fields available from the selected Data Source(s).
- Selecting a field here puts it on the Summary Report.
- Can also use Functions, Formats, Arithmetic, Sub totals and Advanced Field Settings.

Charts and Gauges



- The Chart tab allows selection of type of Chart (graph).
- Once selected, other options relevant to that type of Chart are displayed.
- Gauges tab allows inclusion of different graphical representation of data.

Charts and Gauges

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | | | | | | | Results 1000

Chart Type Pie

Title Records

Label Classification Description Function Group Sort Sort (z-a)

Value Classification Description Function Count Sort Sort (z-a)

Separator ... Function ...

Show Legend

Show As 3D

Explode largest slice

Show Percentage

Show Value Labels

Show Slice Labels

Combine Bottom %

Chart Type Pie

Target report ...

Advanced Properties

Continue to Gauge Preview

Charts and Gauges

Data Sources | **Fields** | **Summary** | **Chart** | **Gauge** | **Misc** | **Style** | **Filters** | **Preview**

Report List | New | Save As... | Print | SQL | | | | | | | | | | Results 1000 | | |

Title Results 1

Name

Value Function

Sort Function Sort (z-a)

Minimum Maximum

Color

Gauge Style Radial Radial 2 Linear

Target report Effect

Sharing Reports

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save As... Print SQL | | | | | | | Results 1000

Report Header Image Justification: L

Title L → L R M

Description L

Header L

Footer L

Share With: Everyone

Rights: None

None Full Access Read Only View Only

Continue to Style Preview

- Misc tab allows you to add a title, description and header and footer for your report.
- Set sharing rights for your reports.
- None – Not shared.
- Full Access – Can run edit, resave and save over your report.
- Read Only – Can run, edit and save own version.
- View Only – Can run (and change filters if set.)
- You can choose L(ef), R(ight), or M(iddle) to select where the Title etc. display

Styling Your Report

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | Results 1000

Border color (Default) Header color (Default) Header foreground color (Default)

Item color (Default) Item foreground color (Default) Alternating item color (Default)

Restore Default

Sample grid

| Number | Letter |
|--------|--------|
| 1 | A |
| 2 | B |

Fill Zero Data Between Dates
 Landscape printing
 Show page number
 Show date and time
 Use pagination in web view
 Add bookmark for each visual group
 Page Break After Visual Groups
 Minimize Grid Width

Visual Group Style
Comma Delimited

Items Per Page (In Viewer)
100

Report order

Chart [up/down arrows]
Gauges [up/down arrows]
Summary [up/down arrows]
Detail [up/down arrows]

Report order

Chart [up/down arrows]
Gauges [up/down arrows]
Summary [up/down arrows]
Detail [up/down arrows]

- Style tab allows colour selection and styling options.
- Options are available for PDF of report.
- Set order of appearance for the parts of your report.

Filters

The screenshot displays the 'Filters' tab in a software application. The interface includes a toolbar with various icons and a main configuration area. The configuration area has columns for 'Filter Field', 'Operator', 'Value(s)', 'Blank', and 'Param'. A filter rule is defined with a dropdown arrow pointing to the 'Operator' field and a checked checkbox in the 'Param' column. Below the filter rule is a text box for 'Filter Logic' containing the example '(1 OR 2) AND (3 OR 4)' and a 'Preview' button.

- The Filters tab allows filtering of results by any field from the data source(s). Multiple filters can be used. (Similar to Custom Report or General Data Export selection criteria pages).
- To have the filter appear on the results page so that others can use it when running the report, select the 'Param' checkbox.
- Can also add logic for filters.

Email and Scheduling Capabilities



Available from main menu or on toolbars.

- Envelope icon – ad hoc one time email of chosen report.
- Calendar Icon – regular scheduled delivery of report, permission restricted in Role Manager.
- Deliveries can be daily, weekly, monthly or quarterly.
- Letter configured in Policy Manager > Edit Letters.
- Email can contain deep link if sent to editors with permissions to run reports, alternatively email can have PDF/Excel attachment of chosen report.
- Merge Fields available;
- %REPORT_NAME%
- %LIVE_REPORT_DEEP_LINK%
- %SCHEDULE_DESCRIPTION%
- %NUMBER_OF_REMAINING_DELIVERIES%

Email and Scheduling Capabilities

Send Report by E-mail

The publication has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Please choose a letter.



Cancel

Customize Letter

- Can configure multiple letters for different uses.
- Enterprise Analytics Reporting letter family.
- Option to customize both ad hoc and scheduled delivery letters.

Email and Scheduling Capabilities

From: "Demo AW" <awalton@ariessc.com>

To: Selected Editors:

ALL EDITORS
ASSOCIATE EDITOR
Dr Alison Associate-Editor
EDITOR
Professor Eddie Editor
EDITORIAL ASSISTANT
MANAGING EDITOR
Alison Admin
mary mary

Letter Subject: Publication Report

Attachments: [Add/Change Attachments](#)

Attach PDF of report to Letter
 Attach Excel file of report to Letter

Letter Body: [Insert Special Character](#) | [Insert Custom Merge Field](#) | [Add Formatting](#) [Open in New Window](#)

Dear Editor,

Please find attached a PDF of %REPORT_NAME%






Regards


%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%

- Email recipients can be Editors on your EM site, manually added or hardcoded email address for non EM recipients.
- If Editors selected from List, deep link to run report from email can be included.
- Checkbox for PDF and Excel attachments of chosen report.

Email and Scheduling Capabilities


New Delivery Schedule for this report

| | |
|-------------------------------|--|
| Schedule Description: | <input type="text" value="Insert Special Character"/>  <small>Maximum 200 characters</small> |
| Delivery Frequency: | Weekly  |
| First Delivery Date: | Date 06/16/2017  (mm/dd/yyyy) |
| Additional Deliveries: | End after: 5  total deliveries |
| Letter: | <input type="text" value="Please Choose a Letter"/>  <input type="checkbox"/> Attach PDF of report to e-mail <input type="checkbox"/> Attach Excel file of report to e-mail |



Saved Delivery Schedule and Letters for this Report

Click 'Remove' if you want to permanently remove this delivery schedule. Click 'Edit' to edit the criteria and letter saved for the delivery schedule.

| Schedule Description | Frequency | Number of Remaining Deliveries | Most Recent Delivery Date | Next Scheduled Delivery Date | Actions |
|--------------------------------------|-----------|--------------------------------|---------------------------|------------------------------|---|
| Quarterly Report | Quarterly | 5 | | 06/16/2017 | Edit Remove  |
| Monthly Report on Submission Numbers | Monthly | 14 | | 06/16/2017 | Edit Remove |

- Can configure multiple schedules for the same report.
- Saved schedules can be viewed, edited or removed.

Questions?

