

Welcome to the 17th Annual
EMUG BOSTON

#EMUG2019



EMUG 2019

Introduction to EAR

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Introduction to EAR

- 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

EAR Main Menu

Editorial Main Menu > Reports > Enterprise Analytics Reporting



EAR Main Menu

Enterprise Analytics Reporting

Create Report ←

Get more help about database tables and their contents

Get more help about Views and their contents ↑

My Reports

Security clearance required

My super secret report

Shared Reports

testing

MSC 123438 multipliers amd people&address report with schedules

Standard Reports ←

Editorial Reports

Production Tracking Reports

Avg Days to Complete Production Tasks in selected timeframe
Submission Turnaround Times - Editorial and Production
Submission Turnaround Times - Production

Third Party Exports

CRediT Usage by Manuscript

- Standard Editorial, Production, 3rd Party reports already set up.
- “Create Report” link for designing reports.
- Edit/Design ability for modifying existing reports, both custom and standard.



EAR Main Menu

The screenshot shows the EAR Main Menu interface. On the left, there is a sidebar with the title "Enterprise Analytics Reporting" and a "Create Report" button. Below this, there are two links: "Get more help about database tables and their contents" and "Get more help about Views and their contents". The main content area is divided into three sections: "My Reports", "Shared Reports", and "Standard Reports".

- My Reports:** This section has a yellow arrow pointing to its header. It contains a folder icon labeled "Security clearance required" and a report icon labeled "My super secret report".
- Shared Reports:** This section has a yellow arrow pointing to its header. It contains a folder icon labeled "testing" and a report icon labeled "MSC 123438 multipliers amd people&address report with schedules".
- Standard Reports:** This section has two yellow arrows pointing to its header and the "Editorial Reports" folder icon. It contains three report icons: "Editorial Reports", "Production Tracking Reports", and "Third Party Exports".

- 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

Just click!



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
- People and Institutions
- People Detail Sheet Subreport
- People List Subreport
- Reviewer Thank-You List

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

Icons and Toolbars

What do those Icons mean?

Icons and Toolbars

Standard Reports

Editorial Reports

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

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

 SFTP  Report List |  Print    Design

 Show Filters Add Field ... Delete Field ... Update Results

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

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

- Edit, send and schedule reports from main menu.
- 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/SFTP and regular schedule delivery of reports – to be covered shortly!

Editing and Creating Reports

To modify or create from scratch?



Editing and Creating Reports



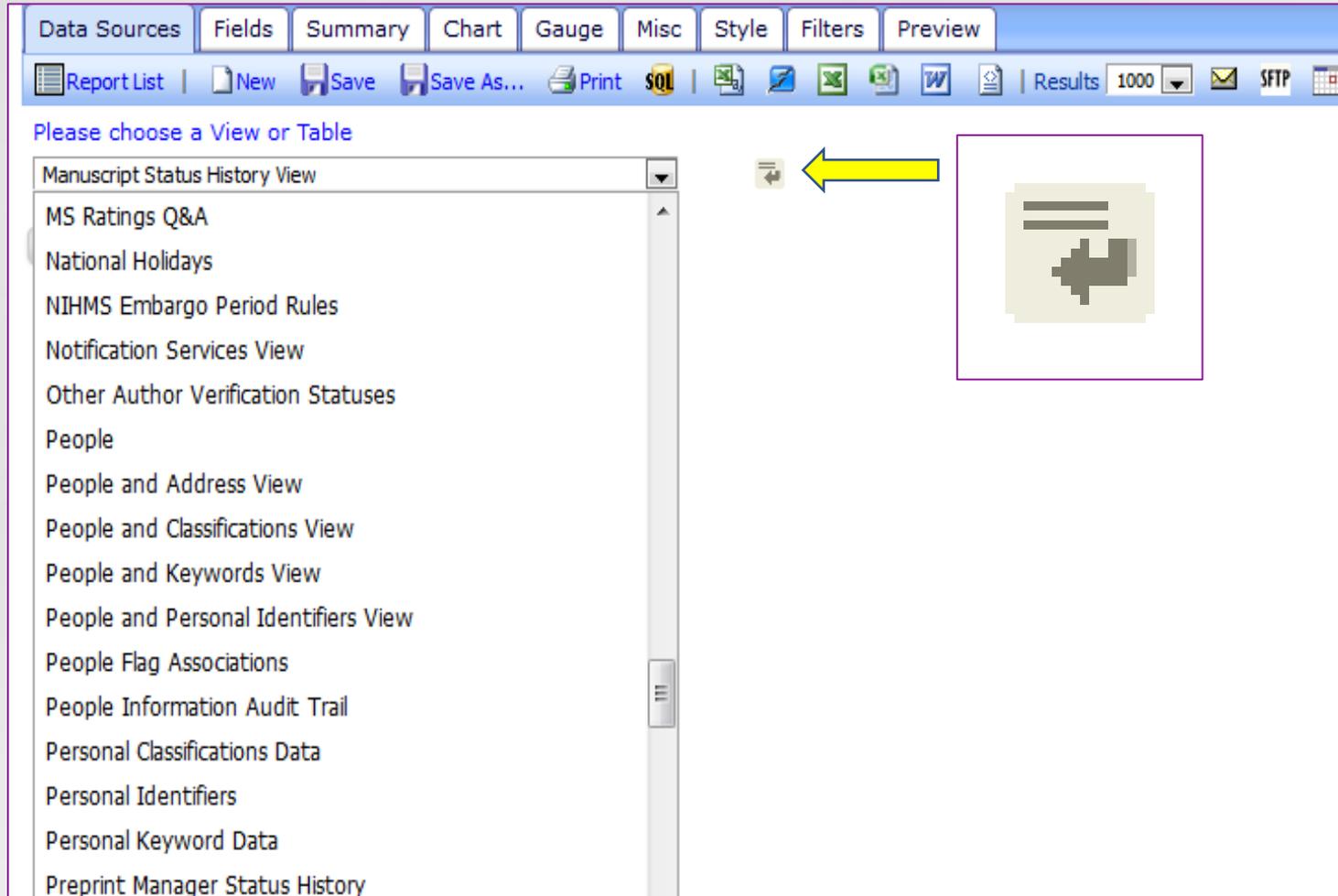
[Create Report](#)

- 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...?

Data Sources

Required

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.

Fields

Required

Fields Tab

Records

Field	Description	Sort	VG	A	Function	Format
Manuscript Number	Manuscript Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Article Title	Article Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Article Type	Article Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Final Decision Term	Final Decision Term	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Subtotals

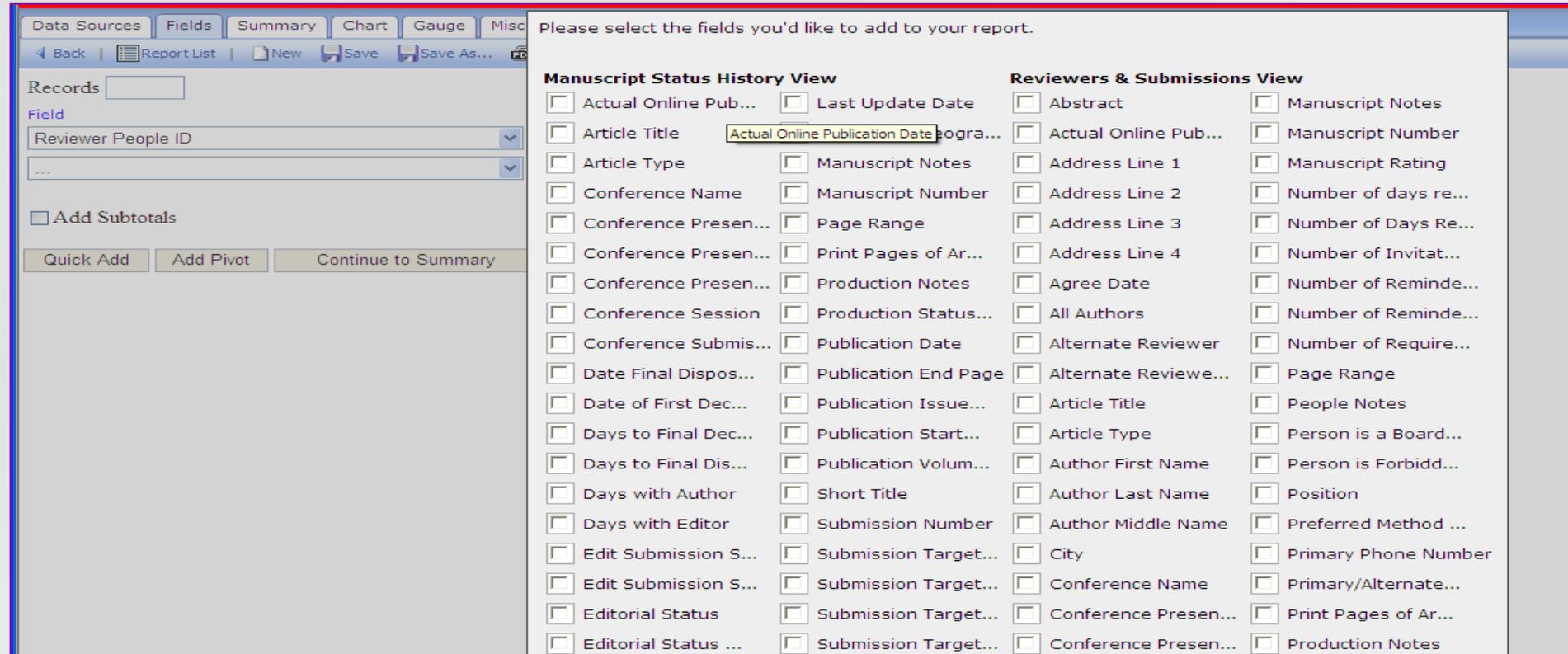
- Fields tab allows selection of output fields.
- Fields are those available from selected Data Source(s).
- Fields selected here will appear on Detail Report.
- Advanced field settings to be covered in more detail later – Subreports, subtotals etc.
- Quick add option.

Report order

Chart	<input type="button" value="↑"/>	<input type="button" value="↓"/>
Gauges	<input type="button" value="↑"/>	<input type="button" value="↓"/>
Summary	<input type="button" value="↑"/>	<input type="button" value="↓"/>
Detail	<input type="button" value="↑"/>	<input type="button" value="↓"/>

<input type="button" value="X"/>	<input type="button" value="↔"/>	<input type="button" value="↔"/>	<input type="button" value="⚙"/>	<input type="button" value="↑↓"/>
<input type="button" value="X"/>	<input type="button" value="↔"/>	<input type="button" value="↔"/>	<input type="button" value="⚙"/>	<input type="button" value="↑↓"/>

Fields Tab – Quick Add



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

Fields Tab

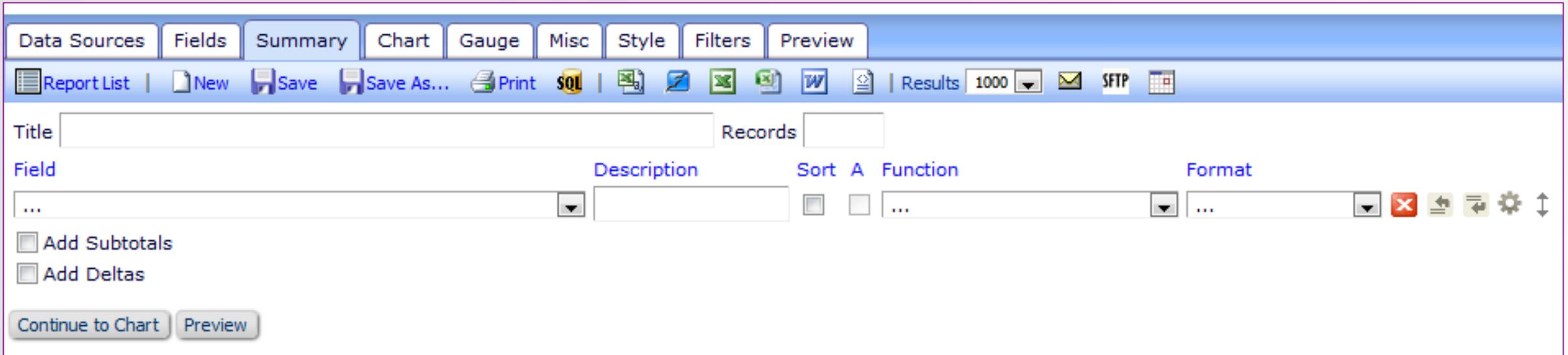
The screenshot shows the 'Fields Tab' in a software application. The interface includes a toolbar at the top with options like 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the toolbar is a menu bar with 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and 'SFTP'. The main area features a 'Records' input field with a yellow arrow pointing to it. Below this is a table with columns: 'Field', 'Description', 'Sort VG', 'A', 'Function', and 'Format'. The first row shows 'Manuscript Number' in the 'Field' column, 'Sub No' in the 'Description' column, and three checkboxes in the 'Sort VG' column. The second row shows '...' in the 'Field' column, '...' in the 'Description' column, and three checkboxes in the 'Sort VG' column. Below the table is an 'Add Subtotals' checkbox with a yellow arrow pointing to it. At the bottom are buttons for 'Quick Add', 'Add Pivot', 'Continue to Summary', and 'Preview'.

- Limit number of records returned.
- Enter your own description for 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.
- Pivot Tables to be covered later!

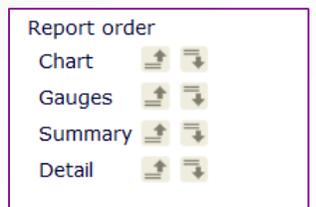
Summary Tab

Optional

Summary Tab



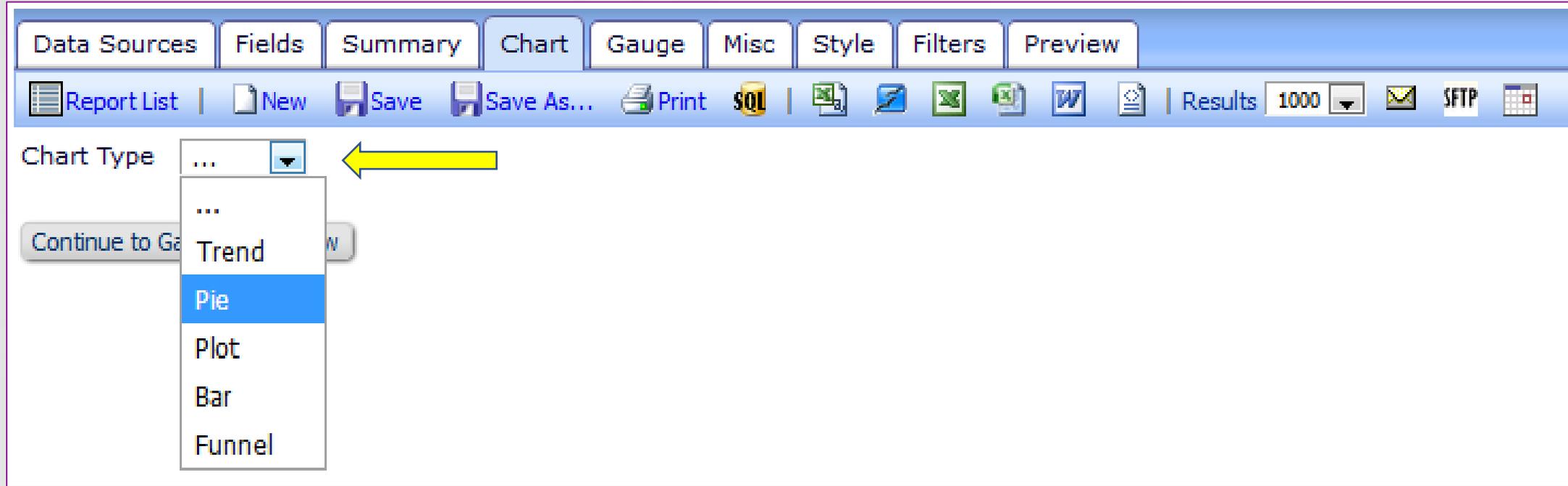
- The Summary tab also shows all the fields available from the selected Data Source(s).
- Selecting a field here puts it on the Summary Report.
- Can also use Description, Sort, Arithmetic, Functions, Formats, Subtotals and Advanced Field Settings.



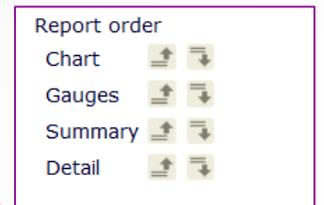
Charts and Gauges

Optional

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.
- Can be ordered alongside the detail and summary reports



Charts and Gauges

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

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

Chart Type Pie

Title Records

Label Actual Online Publication Date Function Group Sort Sort (z-a)

Value Actual Online Publication Date 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 | Save As... | Print | SQL | | | | | Results 1000 | SFTP

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

Optional



Sharing Reports

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

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

Report Header Image Justification: [L]

Title [L]

Description [L]

Header [L]

Footer [L]

Share With: Everyone

Rights: None

Drill-Down Key: ...

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 Reports

Optional



Styling Reports

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

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
- Gauges
- Summary
- Detail

Field|Value column pairs
2

Show main report in Field | Value style
 Show summary report in Field | Value style

Continue to Filters | Preview

Fill Zero Data Between Dates

Report order

Chart



Gauges



Summary



Detail



- The 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
- Fill Zero Data Between Dates allows e.g. months to show with zero submissions, instead of omitting the month from report.

Filters

Optional but advisable!

Filters

The screenshot displays the 'Filters' tab in a software application. The interface includes a toolbar with various icons and a main area for configuring filters. The 'Filter Field' section has a dropdown menu. The 'Operator' section has a dropdown menu. The 'Value(s)' section has a text input field. The 'Blank Param' section has a checkbox. The 'Require' dropdown is set to 'Parameters in View'. The 'Filter Logic' field contains the example '(1 OR 2) AND (3 OR 4)'. A 'Preview' button is located at the bottom left. Three yellow arrows point to the 'Operator' dropdown, the 'Blank Param' checkbox, and the '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.

Filters

The screenshot shows a software interface with a 'Filters' tab. The main area contains a table for defining filters:

Filter Field	Operator	Value(s)	Blank	Param
1 Initial Date Submitted	...		<input type="checkbox"/>	<input checked="" type="checkbox"/>
2		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table, there are options to 'Show Filters In Report Description', 'Require ... Parameters in Viewer', and 'Filter Logic' (Ex:(1 OR 2) AND (3 OR 4)).

The 'Operator' dropdown menu is open, showing the following options:

- Blank
- Isn't Blank
- Use Previous OR
- Comparison**
 - Is Less Than
 - Is Greater Than
 - Between
 - Isn't Less Than
 - Isn't Greater Than
 - Isn't Between
- Date & Time**
 - Between
 - In Time Period
 - Less Than Days Old
 - Greater Than Days Old
 - Equals Days Old
- Equivalence**
 - Equals
 - Equals (List)

A secondary dropdown menu is open, showing the following options:

- Equivalence**
 - Equals
 - Equals (List)
 - Equals (Select)
 - Equals (Multiple)
 - Equals (Popup)
 - Doesn't Equal
 - Doesn't Equal (Select)
 - Doesn't Equal (Multiple)
 - Doesn't Equal (Popup)
- Field Comparison**
 - Is Less Than (Field)
 - Is Greater Than (Field)
 - Equals (Field)**
 - Not Equals(Field)

- Various options for filtering.
- Field in one data source can be set to equal the same field from other data source e.g. second join on revision number – to be covered in advanced session!

Email and Scheduling Capabilities

Optional but Useful!



Email and Scheduling



Available from main menu or on toolbars.

- Envelope icon – ad hoc one time email of chosen report.
- SFTP – Can deliver directly to your SFTP site.
- Calendar Icon – regular scheduled (email/sftp) 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, delivery can include PDF/Excel/CSV/XML of chosen report.
- Merge Fields available for letter;
- %REPORT_NAME%
- %LIVE_REPORT_DEEP_LINK%
- %SCHEDULE_DESCRIPTION%
- %NUMBER_OF_REMAINING_DELIVERIES%

SFTP



Send Report over SFTP

Enter the information for the SFTP site to which you would like to transmit the report. Reports must be transmitted using SFTP.

SFTP Server Address (e.g. sftp.ariessys.com):	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="text"/>
Subdirectory:	<input type="text"/>
Email Address (for transmittal notification):	<input type="text"/>

Include PDF of report
 Include Excel file of report
 Include CSV of report
 Include XML of report

- Delivery can include PDF/Excel/CSV/XML of chosen report.
- Customise recipient SFTP on the fly

Emailing Reports



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.

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

Emailing Reports – Letter Options

From: mary mary <trash1@ariessc.com>

To: Selected Editors:

ALL EDITORS
ASSIGNED EDITOR
COPY EDITOR
Celia CopyeDITOR
EDITOR IN CHIEF
Eddie Editor-in-Chief
EDITORIAL ASSISTANT
INVITED EDITOR
Eduardo Invited Editor
MANAGING EDITOR
Melanie Cotterell

hardcodedrecipient@office.com

Letter Subject: Publication Report

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:

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

Letter Body: [Insert Special Character](#) [Open in New Window](#)

Dear %TITLE% %LAST_NAME%,

Please find a link below to %REPORT_NAME%

%LIVE_REPORT_DEEP_LINK%

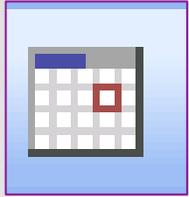
This is sent to you as the %SCHEDULE_DESCRIPTION%

There are %NUMBER_OF_REMAINING_DELIVERIES% deliveries left for this report, please tell the Publication Office when this number gets to 1 so they may continue deliveries.

%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%

- Editor recipient list.
- Hardcoded recipient/cc/bcc.
- Optional cc/bcc email address entry.
- Choice of attachment options PDF/Excel/CSV/XML.

Scheduling



- Choose Email or SFTP.
- Select Letter and Customise.
- Daily schedule can be set to working or calendar days.
- Edit existing schedules to add more deliveries (max 500).

New Delivery Schedule for this report

Schedule Description:	<input type="text" value="Insert Special Character"/> <small>Maximum 200 characters</small>		Delivery Method:	<input type="radio"/> Email <input checked="" type="radio"/> SFTP	
Delivery Frequency:	Daily <input type="button" value="v"/> <input checked="" type="radio"/> Use Calendar Days <input type="radio"/> Use Working Days		SFTP Options:	<input type="text" value="SFTP Server Address (e.g. reports.customer.net):"/> <input type="text" value="Username"/> <input type="text" value="Password"/> <input type="text" value="Subdirectory"/> <input type="text" value="Email Address (for transmittal notification):"/>	
First Delivery Date:	Date <input type="text" value="06/13/2019"/> <input type="button" value="calendar"/> (mm/dd/yyyy)			<input type="checkbox"/> Include PDF of report <input type="checkbox"/> Include Excel file of report <input type="checkbox"/> Include CSV of report <input type="checkbox"/> Include XML of report	
Number of Deliveries:	End after: <input type="text" value="5"/> <input type="button" value="v"/> total deliveries				
Delivery Method:	<input checked="" type="radio"/> Email <input type="radio"/> SFTP				
Letter:	<input type="text" value="Please Choose a Letter"/> <input type="button" value="v"/> <input type="checkbox"/> Attach PDF of report to email <input type="checkbox"/> Attach Excel file of report to email <input type="checkbox"/> Attach CSV of report to email <input type="checkbox"/> Attach XML of report to email				

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	Delivery Method	Actions
daily schedule	Daily	0	05/31/2019	Expired	Email	Edit Remove
weekly schedule	Weekly	18	06/08/2019	06/15/2019	Email	Edit Remove

Advanced Features Preview

Reviewers completing the most reviews - top 25 Reviewers

Last Name	First Name	Reviewer People ID - drill down to people details	E-mail	Number of Completed Reviews▼	Average Days Late	Reviewer People ID - drill down to prior year completed reviews
Reviewer	Ron	4	trash1@ariessc.com	351	15	4
Referee	Robert	8	trash1@ariessc.com	91	14	8
Donna	Donna	48	trash1@ariessc.com	84	5	48
Fifth	Thomas	13	trash1@ariessc.com	78	2	13
Dextrous	Anne	23	trash1@ariessc.com	53	8	23
Wynne	Richard	6	trash1@ariessc.com	37	40	6
Second	John	10	trash1@ariessc.com	31	18	10
Hildreth	Lon	5	trash1@ariessc.com	29	10	5
Fourth	Nancy	12	trash1@ariessc.com	29	17	12
Reviewer	Peter	33	trash1@ariessc.com	26	7	33
First	Jane	9	trash1@ariessc.com	19	27	9
Author	Andrew	3	trash1@ariessc.com	16	24	3
Third	William	11	trash1@ariessc.com	13	21	11
Raptor	Ron	131	trash1@ariessc.com	12	12	131
Sixth	Diana	30	trash1@ariessc.com	9	0	30
Holmes	Lyndon	15	trash1@ariessc.com	9	0	15
Carlson	Kevin	85	trash1@ariessc.com	9	0	85
Author	Dianne	209	trash1@ariessc.com	9	0	209
Tzvaltta	Gregore	181	trash1@ariessc.com	8	23	181
Author	Anthony	2	trash11@ariessys.com	8	44	2
ascdemo	ascdemo	179	trash1@ariessc.com	7	0	179
Bewyer	Barbara	56	trash1@ariessc.com	6	0	56
Eighth	David	112	trash1@ariessc.com	6	0	112
Tenth	Jill	49	trash1@ariessc.com	5	0	49
Author	Barry	65	trash1@ariessc.com	5	0	65

- Reviewer Thank You List – standard report.
- Shows limited records in Summary (25).
- Drill Down reports – link to bring in data from other report.
- Counts and Averages displayed.