
Using Summon Analytics

This section describes the general activities that you can perform with Summon Analytics, such as the following:

- Navigating Summon Analytics
- Running out-of-the-box reports
- Creating reports
- Adding graphs to reports.

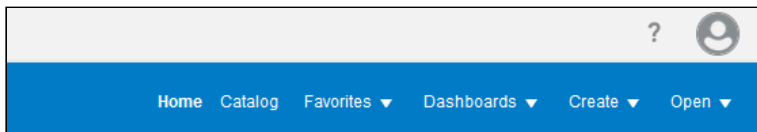
Navigating Summon Analytics

This section describes how to access the Summon Analytics and navigate among the various options.

To access Summon Analytics:

1. Open the Summon Administration Console.
2. Click Usage at the top of the administration console

You can use the Global Header (which displays at the top of each page) to navigate between components in Summon Analytics.



Global Header

Global Header

The global header includes the following components:

- **Home**– Displays the Home page
- **Catalog**– The location where all reports are saved, including personal and shared reports. For more information, see [Catalog](#).
- **Favorites**– access and manage your favorite reports and dashboards
- **Dashboards**– A shortcut to all available dashboards that are saved in the dedicated dashboard subfolders.
- **Create** – Displays a list of the OBA objects that can be created. This document describes the Analysis option (which creates new reports) and the Dashboard option (which creates dashboards). For more details on creating new reports, see [Creating New Reports](#).

- **Open**– Displays the following options:
 - **Recent** – Displays a list of the objects that you have recently viewed, created, or updated.
 - **Most Popular Objects**– Displays a list of the objects that are accessed the most often.

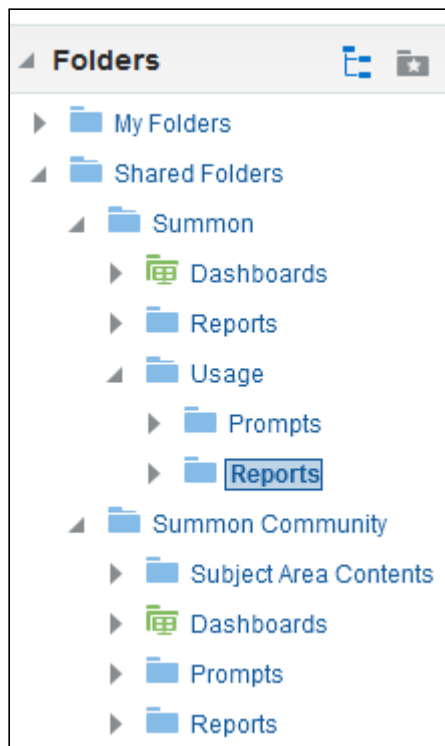
Above the header there are two icons. The following menu options can be accessed by clicking on the specific icon:

- **User**
 - **My Account**– Displays the My Account page, which allows you to specify your preferences such as the timezone, delivery devices, and delivery profile.
 - **Sign Out**– signs out the current user
- **Question Mark**
 - **Oracle Analytics**– generic help documentation provided by Oracle

Catalog

The Catalog arranges reports and dashboards (grouping of reports) into folders. In addition to reports and dashboards, it is also possible to store report prompts as standalone objects.

The Summon Analytics Catalog has the following folders, which display in the folder's pane:



Types of Analytics Folders

- **My Folders** – Stores your personal reports and dashboard in subfolders. The content in this folder will not be shared with others in your institution or the Summon community.
- **Shared Folders** – Stores reports, prompts and dashboards that can be shared at various levels in subfolders. The Shared Folders folder has the following subfolders:

- **Summon** – Contains the out-of-the-box reports and dashboards created by Ex Libris. These reports cannot be modified directly, but you can copy them to My Folder and change them. The Summon folder contains the following subfolders:

Summon Subfolders

Subfolder	Description
Dashboards	<p>This subfolder contains the following dashboards:</p> <ul style="list-style-type: none"> ▪ Example Dashboard – This dashboard contains a tab for each Summon subject area. ▪ Trends – This dashboard focuses on searches and usage.
Usage	This subfolder contains usage-related reports.
Prompts	This subfolder contains prompts.
Reports	This subfolder contains reports.

- **Summon Community** – This folder contains reports and dashboards that are created by the entire Summon community. Reports placed in this folder can be viewed and edited by all Summon customers who have access to the OBI. The reports are shared across all regions using a scheduled synchronization that runs every week on Friday. You can copy these reports to your folders to make local modifications.

The Summon Community folder has the following out-of-the-box subfolders: Dashboard, Prompts, and Reports.

The Reports subfolder has a separate subfolder for each subject area, which are described in separate sections below. When adding reports to the Summon Community folder, make sure that you add reports to the appropriate folder and prefix the name of the reports with your institution name and a dash so that each report is identifiable by the contributing institution. For example:

- U. Minn - Search Related Actions
- U. Sienna - Sessions and Sign-in

Each institution can browse the folders for reports pertaining to a specific area or perform a search for reports from a specific institution.

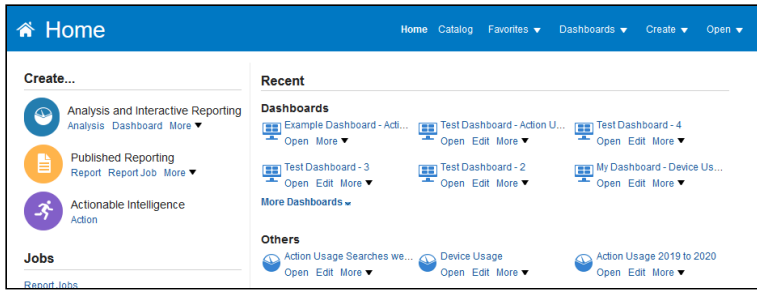
Libraries are encouraged to add information in the properties of the reports so that other libraries are able to identify the functionality of the report easily. For example:



Session Usage Example

Home

Click the Home link to display the Summon Analytics home page:



Summon Analytics Home Page

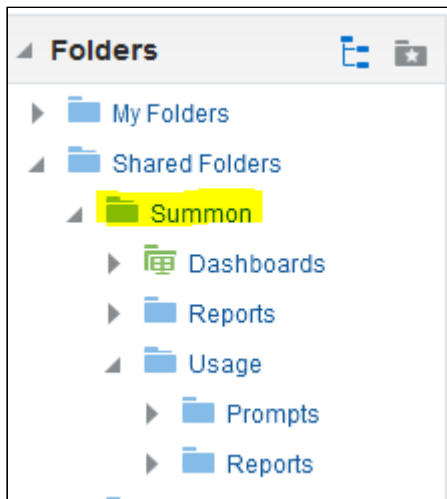
The Home page is a task-oriented, centralized workspace that is combined with a global header that provides access to Summon Analytics objects, their respective editors, help documentation, and other features.

Running the Out-Of-The-Box Reports

You can run reports whose criteria have been created by Ex Libris.

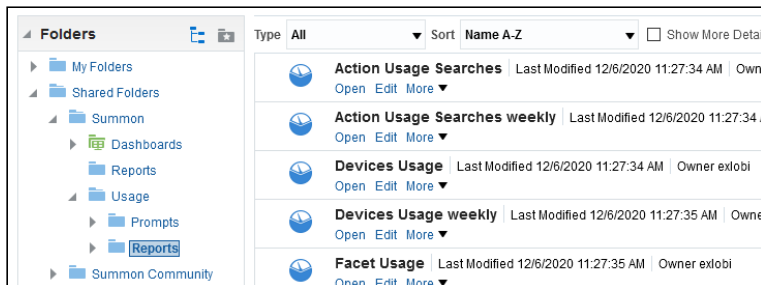
To run an out-of-the-box report:

1. Click **Catalog** and then select the **Summon** folder under **Shared Folders**.



Shared Folders

2. Click the expand buttons next to **Shared folders > Summon > Usage > Reports**—for example, the out-of-the-box reports that are related to Usage display:



Usage Reports

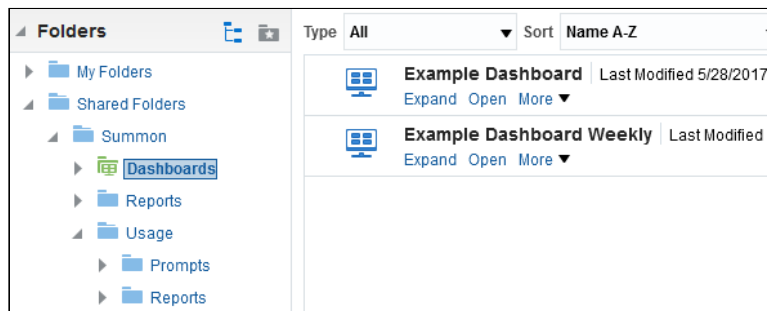
3. Click **Open** for the report that you want to run.

Displaying Dashboards

Dashboards provide an at-a-glance view of one or more reports. These dashboards may be provided by Ex Libris, the community, or yourself. You can display these dashboards from either the Catalog or the Dashboard drop-down list in the Global Header.

To display an out-of-the-box dashboard from the Catalog:

1. Click **Catalog** and then select the **Summon** folder under the **Shared Folders**.
2. Click the expand buttons next to **Shared folders > Summon > Dashboards**
3. Click **Open** for the dashboard you want to display.



Dashboards

To display a dashboard from the Community:

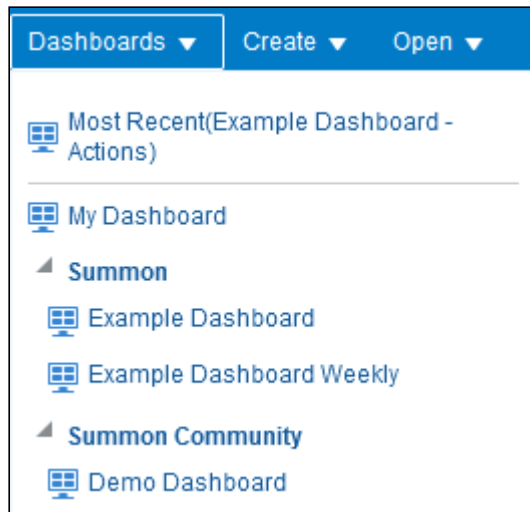
1. Click **Catalog** and then select the **Summon Community** folder under the **Shared Folders**.
2. Click the expand buttons next to **Shared folders > Summon Community > Dashboards**
3. Click **Open** for the dashboard you want to display.

To display your personal dashboard:

Click **Catalog > My Dashboard**.

To display a dashboard from the Global Header:

1. Click Dashboards in the Global Header:



Dashboards

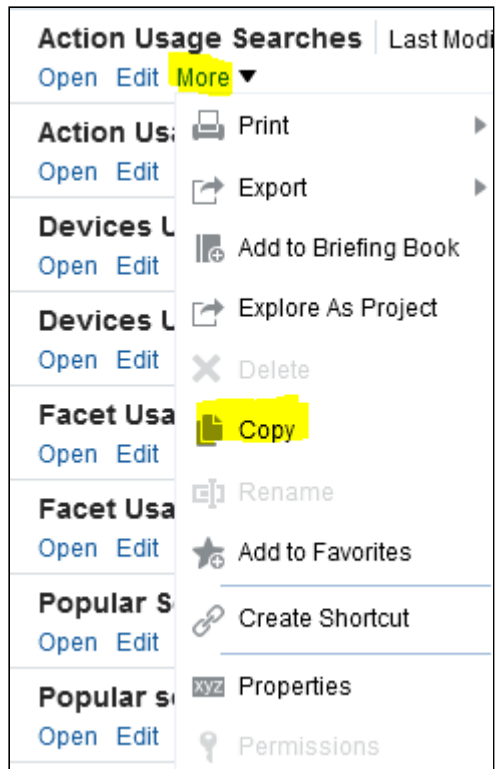
2. Select the dashboard that you want to view under **Summon** or **Summon Community**. If you want to see your personal dashboard, click **My Dashboard**.

Copying Reports

The copy function allows you to customize a report to create another report. This is useful if the original report includes similar information.

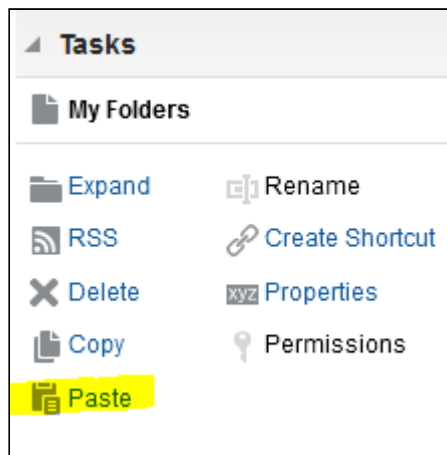
To copy a report:

1. Open the catalog and locate the report that you want to copy.
2. Select **More > Copy**.



Selecting a Report to Copy

3. Navigate to the target folder of the report under **My Folders** or **Summon Community** and select **Paste** under the **Tasks** pane.



Pasting the Report in the Target Folder

Creating New Reports

You can create new reports to provide you with information on library activities. The simplest way to create a report is based on one subject area. There are cases in which you need to combine data from more than two subject areas. (For more information on creating a report from two subject areas, see [Creating Advanced Reports](#)).

Note

Analytic reports can have a maximum of one million cells and up to 65,000 lines.

Reports in Summon Analytics can be based on data that is organized by subject areas that fall under the Usage category:

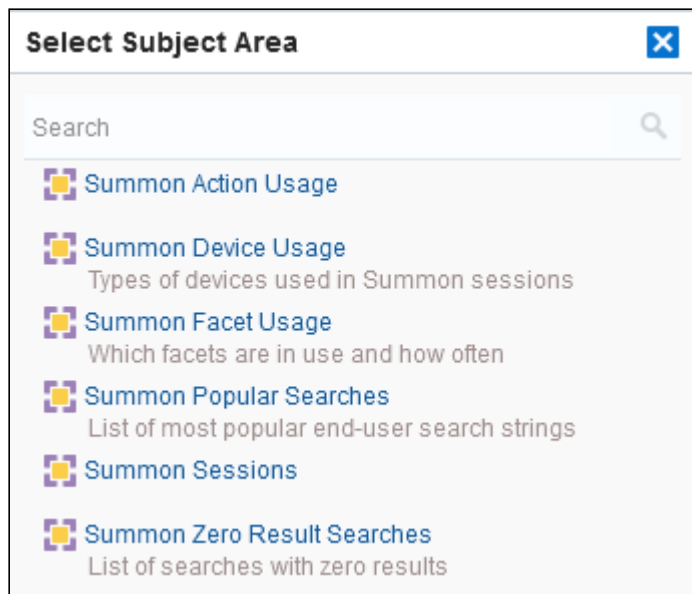
- Summon Action – Provides information on end user use of the various Summon functionality.
- Summon Facets – Provides information on facet usage.
- Summon Popular Searches – Lists the details for the most popular searches.
- Summon Sessions – Provides information on Summon sessions.
- Summon Zero Result Searches – Lists the details for searches that found no results.

Creating Basic Reports

The following procedure is a basic example of how to create a report:

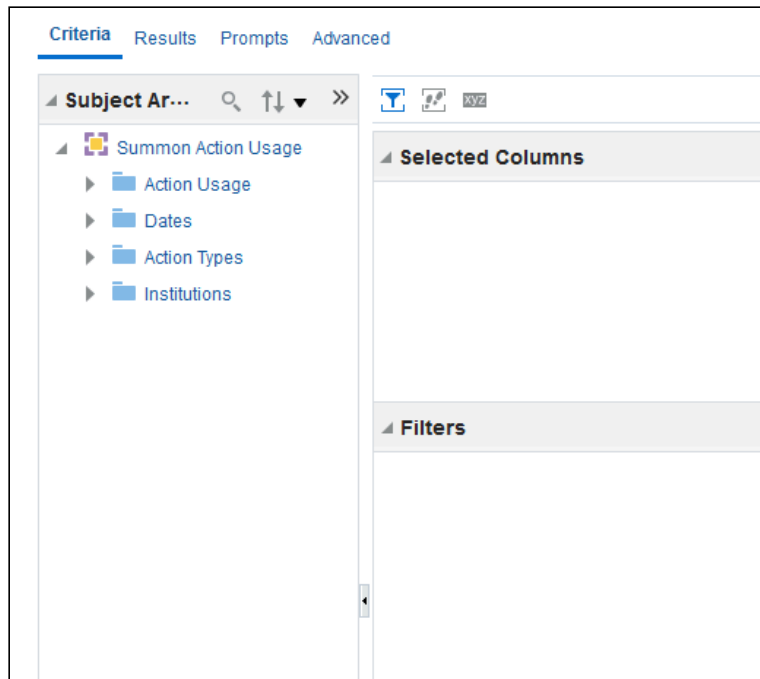
To create a report:

1. Select **Create > Analysis**. The Select Subject Area menu opens.



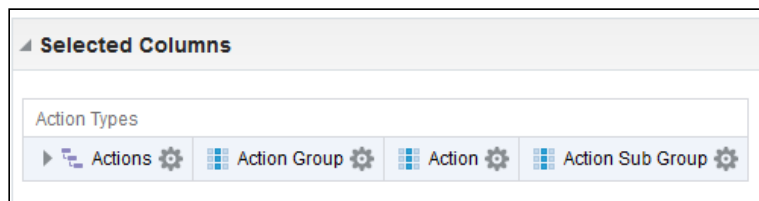
Select Subject Area Descriptions Menu

2. From the Select Subject Area menu, select the type of report you'd like to create. For this example we will create a **Summon Action Usage** report. This will bring us to the **Analysis Editor**. The left pane displays the elements of the Summon Actions Usage subject area:



Analysis editor

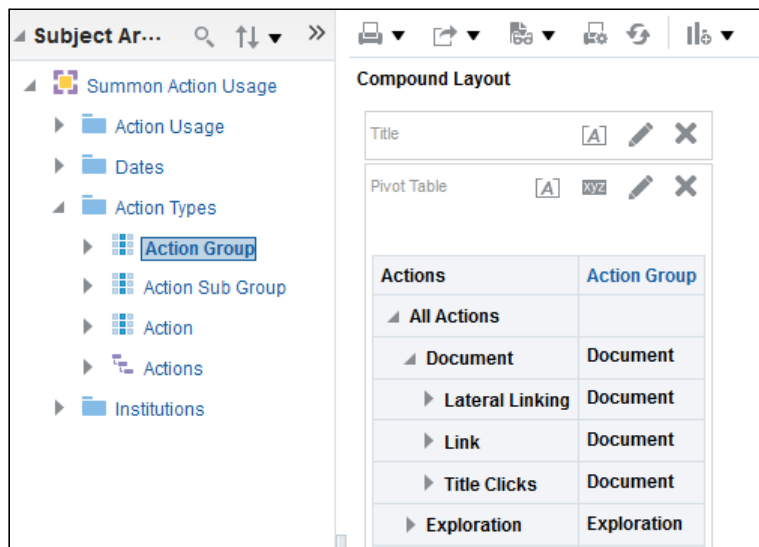
3. Click the arrow next to the Actions Type to expand the Actions Type dimension folder. Double-click the Action Group, Action Sub Group and Action fields (or drag and drop them into the Selected Columns pane).
4. Click the arrow next to the Action Usage folder. Double-click or drag the items into the Selected Columns section:



Selected Columns

You can reorder the columns in your report by clicking and dragging them to the new position.

5. Click the Results tab to see the report's results.



Creating Advanced Reports

You may want to include information in a report from two subject areas. In order to be able to create reports from two subject areas, the following conditions must be met:

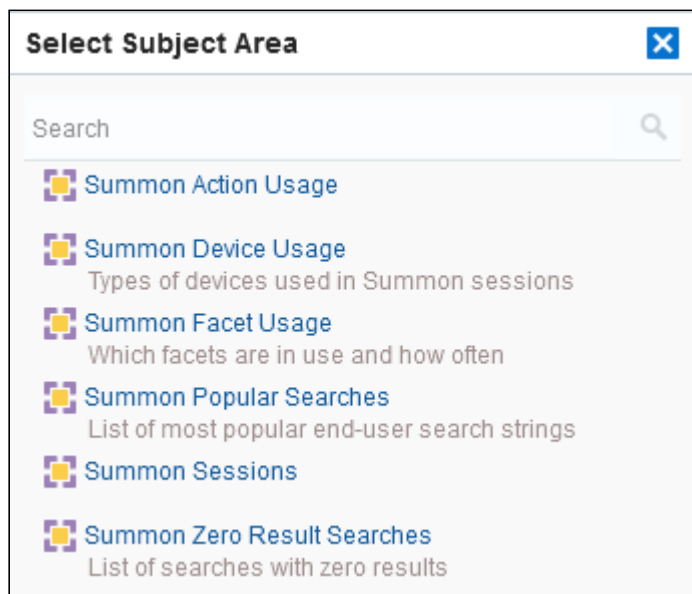
- There must be at least one common dimension between the two subject areas.
- Descriptive fields must come from the common dimensions.

If you attempt to create a report from two descriptive fields that are not in common between the two subject areas, an error message will display.

In this example, we create a report from the Actions Usage and Sessions to create a report that on the average number of actions per session.

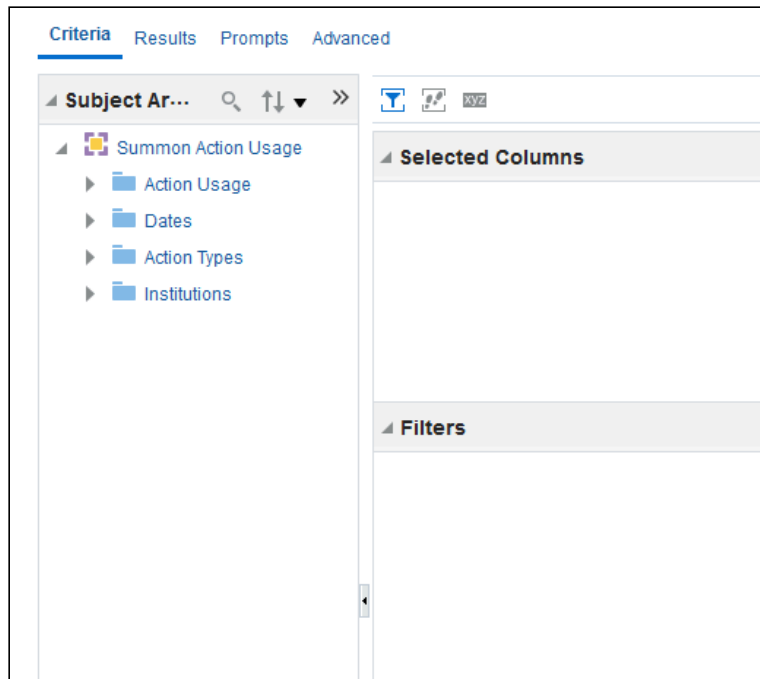
To create a report from two subject areas:

1. Select **Create > Analysis**. The Select Subject Area menu opens.



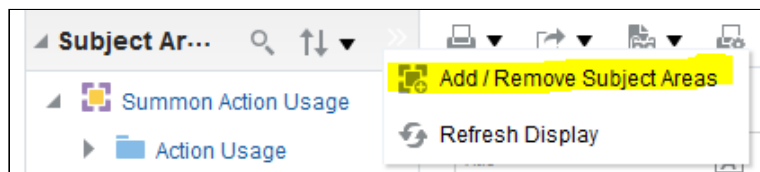
Select Subject Area Descriptions Menu

2. In the Select Subject Area menu, select **Summon Action Usage** — for example, to open the Analysis Editor.



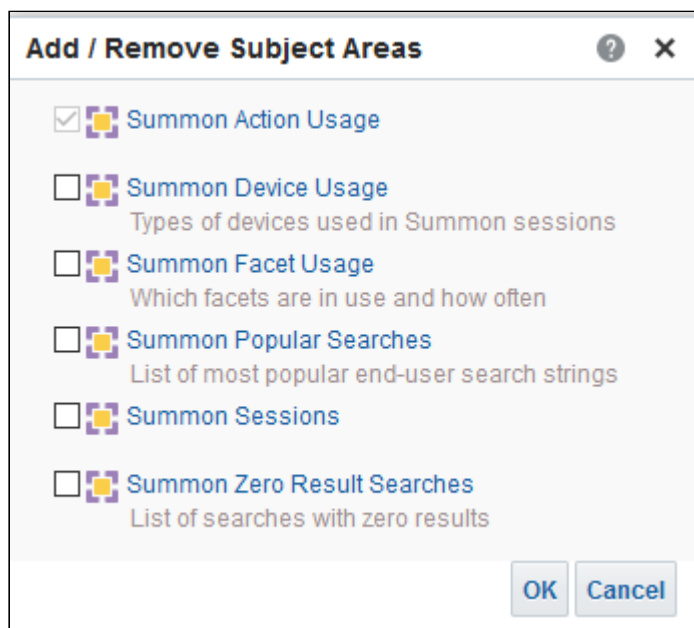
Analysis Editor

3. In the left pane, click Add/Remove Subject Areas (you may need to click the double arrow to make the menu item visible).

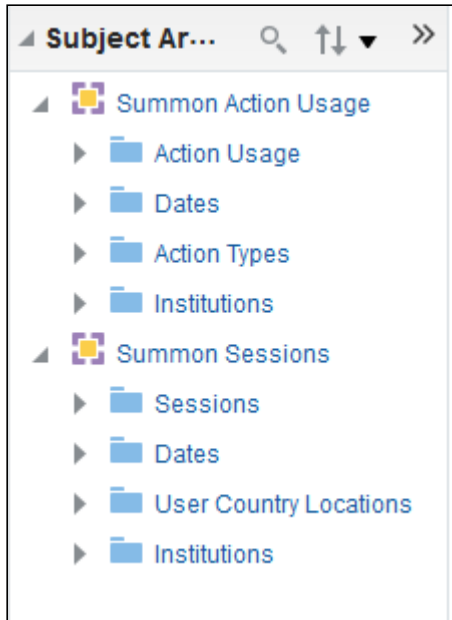


Summon Action Usage and Summon Session Subject Areas

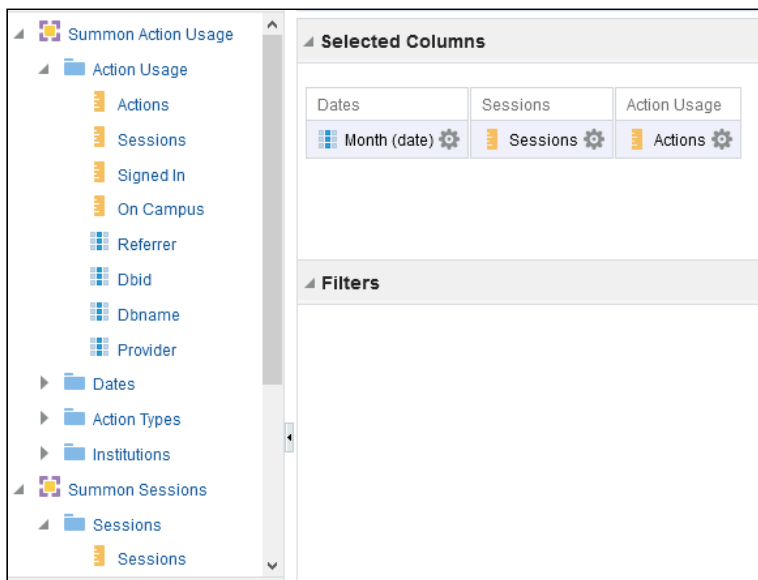
4. Select **Summon Sessions** from the **Add/Remove Subject Areas** window and then select **OK**.



You should now be able to see both subject areas in the left-hand window:



- The Action Usage and Sessions subject areas have the Dates dimension in common. Add any date type to the report as well as any measurement dimensions. For example, select **Sessions** from the **Sessions** column and **Actions** from the **Action Usage** column.



- Select **Results** to see sessions and actions grouped by date:

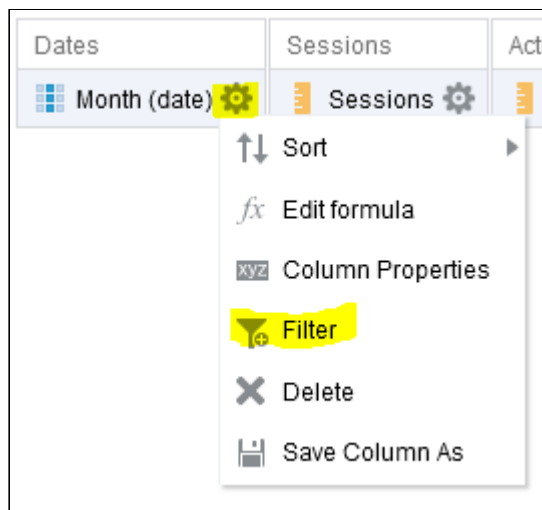
Month (date)	Sessions	Actions
3/1/2017	1	2
4/1/2017	47	58
5/1/2017	4	5
6/1/2017	10	27
7/1/2017	4	4
8/1/2017	8	25

Filtering a Report

Filters allow you to limit the amount of data displayed in the report and are applied before the report is aggregated.

To filter a report:

1. Select the More Options (gear) icon next to the column you'd like to filter and select **Filter**.



The New filter dialog Box opens:

New Filter [?] [X]

Column Month (date) *fx*

Operator is equal to / is in ▼

Value [] [📅]

[Add More Options ▼] [Clear All]

Protect Filter

Convert this filter to SQL

[OK] [Cancel]

2. Select an option from the **Operator** drop-down list. Available operators and how they work can be found [here](#).
3. Enter a value in the **Value** field. For example, if we wanted only information from January to June 2020, we would enter that information via the date picker or by manually typing it in:

New Filter [?] [X]

Column Month (date) *fx*

Operator is between ▼

Value 01/28/2020 [📅]

Value 06/28/2020 [📅]

[Add More Options ▼] [Clear All]

Protect Filter

Convert this filter to SQL

[OK] [Cancel]

Optionally, you can Protect Filter (to prevent other prompts from overriding it).

4. Select the Results tab to display the results filtered according to the criteria that you set:

Month (date)	Sessions	Actions
2/1/2020	151	325
3/1/2020	94	198
4/1/2020	104	495
5/1/2020	109	300
6/1/2020	89	391

Sorting a Report

You can sort the data in a column — for example, to be ascending or descending.

To sort a column:

1. Click the More Options (gear) icon next to the column whose data you want to sort and then select **Sort**.
2. Select a sort option to sort the column.

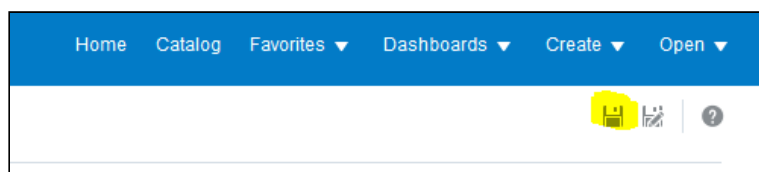
Saving a Report

After you create a report, you can save a private or public version by placing it under the appropriate area:

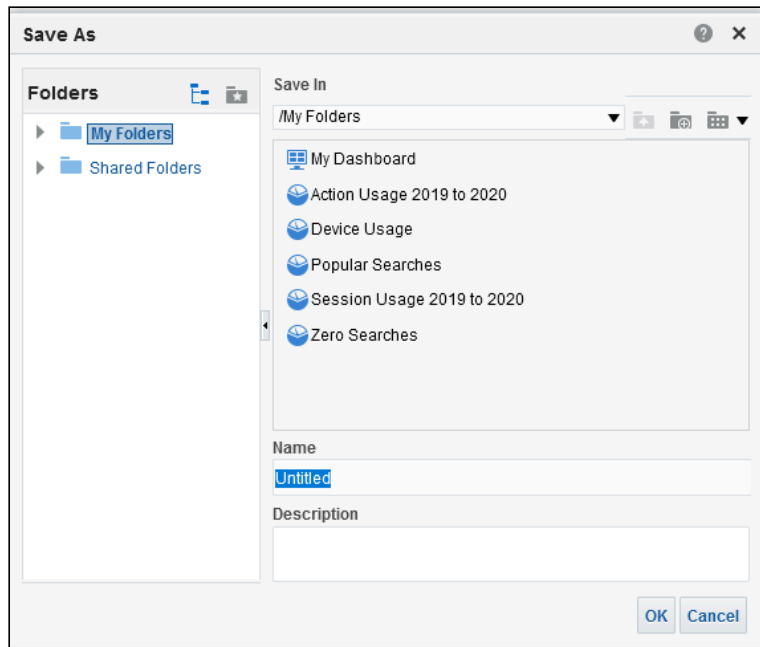
- My Folders – Area reserved for private reports.
- Shared Folders – Area reserved for shared reports. Place all shared reports in the appropriate folder under Summon Community. Do not forget to prefix the report with your institution name and to include a description of the report.

To save a report:

1. Click the Save icon (on the far right under the Global Header):



2. This opens the Save As dialog box.



Save As Dialog Box

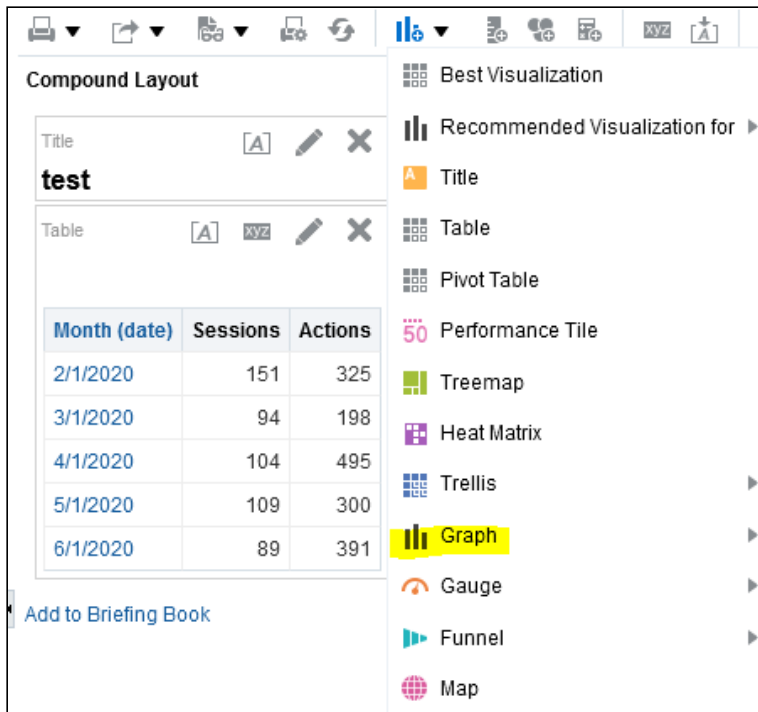
3. Select a folder under either the My Folders area (for private usage) or the Shared Folders are (for shared usage).
4. Specify a name and a description for the new report in the corresponding fields.
5. Click **OK**.

Adding a Graph to a Report

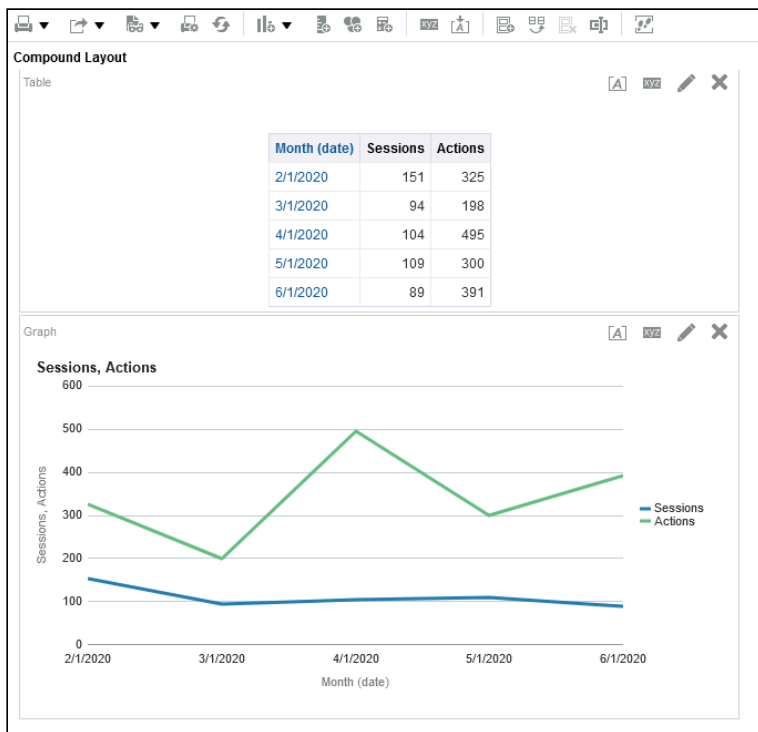
You can add a graph, such as a pie chart, to the report.

To add a graph to a report:

On the Results tab, click the New View (graph) icon and select **Graph**:



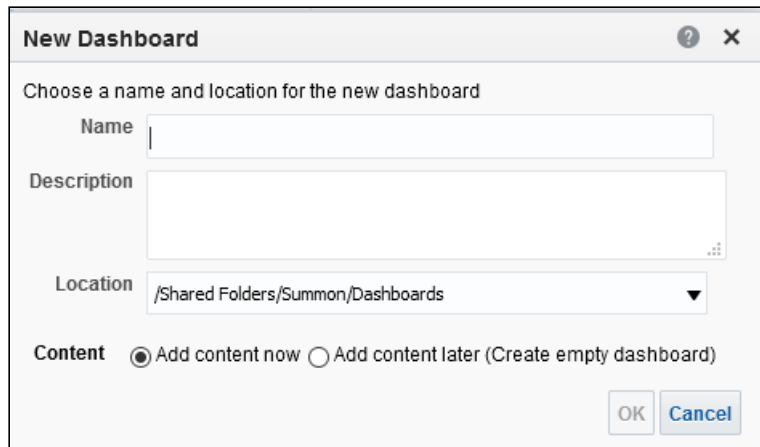
A graph in the style chosen will appear in the Compound Layout area. In this example a line chart is displayed:



Creating a Dashboard

To create a new dashboard:

1. From the global header, click **Create** > **Dashboard** to open the new Dashboard Dialog box:



New Dashboard [?] [X]

Choose a name and location for the new dashboard

Name

Description

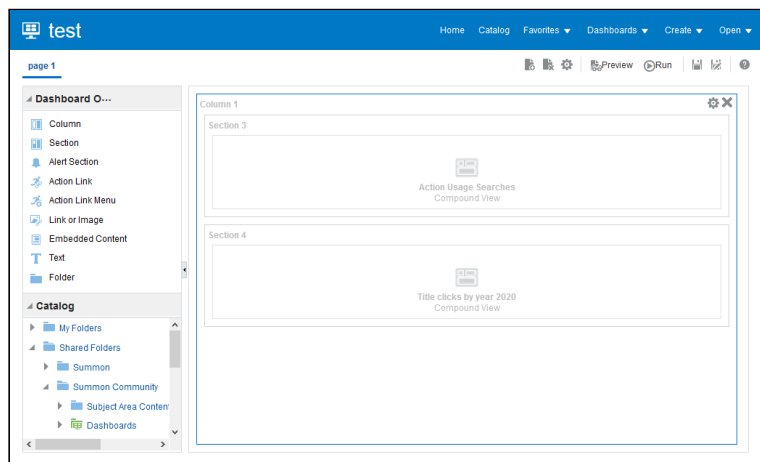
Location

Content Add content now Add content later (Create empty dashboard)

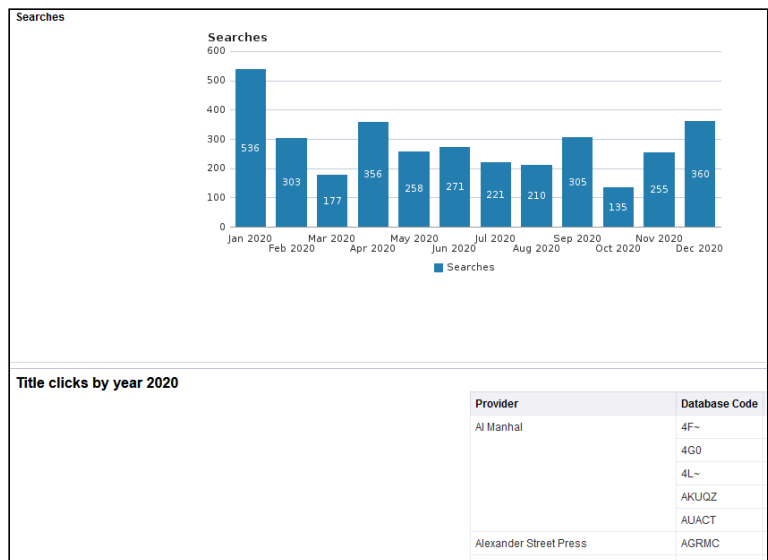
[OK] [Cancel]

New Dashboard Dialog Box

2. Enter the following information:
 - **Name** – Enter a name for the dashboard.
 - **Description** – Enter a description for the dashboard.
 - **Location** – Enter the location where you want the dashboard to be saved.
 - **Content** – If you want to add content now, select **Add content now**, which is the default option. If you want to add content later and create an empty dashboard, select **Add content later (Create empty dashboard)**.
3. Select **OK**.
4. If you want to create a dashboard with reports from your local institution folder, drag and drop reports from your institution's folder in the Catalog pane to the drag-and-drop area in the right pane:



5. Clicking **Preview** in the upper right-hand corner will open an example dashboard display in a new tab:



- If you want to use an out-of-the-box report in a dashboard, you must first copy it to your local institution. Follow the instructions for how to copy a report earlier in this document.