Access to Analyzer: Making the Transition

Appendix handout to supplement the main session

April 28, 2007
Connection Toolbar Icons

Available buttons depend on who you are and where you are

- Refresh the portal
- Show entries in a list
- Show detail information for each entry
- Create a folder
- Run multiple reports
- Create a URL to an external file or Web site
- Create a page
- Select all entries
- Deselect all entries
- Cut the selected entries
- Copy the selected entries
- Paste the clipboard contents to the current location
- Delete the selected entries
- Show the properties for the current folder or package
- Set the order for folders and entries
- Search for reports, report views, folders, and URLs

Detailed view includes description

Technical Author users only

Technical Author users only

Technical Author users only
Icons to the Left of Report Name in Connection

Icon to left of the Report Name shows type and default action for the entry. Report View symbol of 4 small blue boxes on upper left of icon can be applied to any of the report symbols.

HTML Format Report View
Icons to the Right of Report Name in Connection

Available buttons and actions depend on permissions.

Displays common actions that can be performed on that entry.

Clicking the More… link displays all actions that can be performed on that entry.
To create a report, use the query subjects under a given namespace. For example, the “Charge Transactions” namespace contains the query subjects for creating reports related to Charges, both Active and Archived.
Query Studio – Edit Data Tab

Click on the **Edit Data** link in the left column to access various options to manipulate your data, such as:

- apply filters (textual/numeric/date/time);
- sort data;
- create new columns using the Calculate function;
- format data;
- move columns;
- add a column title.

Many of these functions are available from the toolbar.
Query Studio – Run Report Tab

Use the **Preview with Limited Data** or **No Data** options to build a report. It will run much faster.

Select **Run with All Data** when you are ready for your final display.
Click on the link in the left column to access various options to manipulate your report, such as:

- create sections;
- create groups;
- define conditional styles;
- create a chart of your data.

Many of these functions are available from the toolbar.
Report Studio Page Explorer

- Page Explorer, Query Explorer and Condition Explorer buttons.
- The Work Area.
- The Source, Data Items and Toolbox Tabs.
- The Properties Pane.

Page Explorer will provide much of the functionality you need.
Report Studio Query Explorer

Query Explorer allows you to do more complex or difficult tasks and functions:

- Build complex queries;
- Add filters or parameters;
- Create a join relationship;
- Work with SQL or macros.
Report Studio Source and Data Items Tab

Source Tab

• Shows the items from the package you can place in the report.
• Data is organized like Query Studio.
• Like Query Studio you can move data items in various ways.
• Expand + sign to drill down through data.

Data Items Tab

• Shows the data items, queries, expressions included in your report.
• Shows all data items selected including those you do not display. Equivalent to not checking the ‘show’ box in Access.
• Use this tab for selecting data items to build filters.
Report Studio Toolbox Tab

Includes many useful and powerful functions including:

- Complex date and other advanced prompts;
- Calculations;
- Report formatting;
- Charts;
- Text.

Icons available depend on which Explorer you are in, and can include:

- Filter;
- Sort;
- Aggregate;
- Build Prompt;
- Section/Group.

There are more..
Highlight the entire data column to be filtered. Select **Edit Data** from the menu on the left. Click on the **Filter** icon. Available filter conditions appear below Report area. Note that some options depend on type of data item.
Instead of waiting for a long list to load, click on the Type in values link.

Enter the value and click on insert. You can include multiple values.

You may also choose to EXCLUDE values.
Query Studio Creating a Prompt

Reduce the amount of data in the report. With the Prompt option selected, the filter can be changed each time the report runs.

Filter on:
Patron Group Code

Condition:
Show only the following

- Prompt every time the report runs

• Prompts allow users to specify the subset of data retrieved.
• Content can be filtered by textual, numeric or date/time data.
• Equivalent to parameters in Access.

Adding a prompt is easy:
1. Highlight column you wish to filter.
2. Check the “Prompt every time the report runs” box.
Report Studio Creating a Prompt

• Content can be customized by date, fund, location, etc.

This report has two prompts:

1. Drop down list of allocated funds.
2. Date range prompt.

Create a prompt page within Page Explorer. For steps see next page.
Report Studio - How to Add Prompts

- In a blank prompt page, add from toolbox
- Using the add two one for the start date, and one for end date.
- Within each prompt follow the wizard to create parameters.
- Option to utilize prompts every time the report is run.
- Extends end-user's ability to customize their reports.
BLOB in Analyzer

- Open a New List in Cataloging > Report Studio.
- Select the query item needed (must be either BIB ID, MFHD ID or AUTH ID).
- In the Properties window for the data item select the name and edit appropriately to change name of the query item: e.g. bib Tag 500 (all).
- In the Properties window for the data item select the Expression ellipses.
- In Functions > Cataloging Model > MARC Record Access, is a list of all ‘blob’ functions and useful help in the Tips window.
BLOB in Analyzer continued

- Put cursor at beginning of Expression definition and double click on GETALLBIBTAG from available components; edit the end of the expression.

- Your expression should look like:
  GETALLBIBTAG([Presentation Layer].[Bib Record].[Bib ID],’5xx’,2)

- Add a Filter to exclude display of records that don’t have your field of interest:
  e.g. [BIB Tag 500 (all)] IS NOT NULL

- Add a Filter to limit the number of records while testing:
  e.g. [Presentation Layer].[Bib Record].[Bib ID]<100

- Go to Page Explorer and add items to be displayed in list.
BLOB Screen Shot

Expression syntax

Blob functions

Expression properties
<table>
<thead>
<tr>
<th>Bib ID</th>
<th>Brief Title</th>
<th>bib Tag 500 (all)</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>Annual reports on national life.</td>
<td>500: :$aIssues for 1980-1982 have title: Annual report on national life; issues for 1983-1993 have title: Annual report on the national life for fiscal ...</td>
</tr>
<tr>
<td>34</td>
<td>Rutgers journal of computers, technology and the law.</td>
<td>530: :$aAlso available in an electronic version.</td>
</tr>
</tbody>
</table>

Multiple fields are separated by ‘//’

This blob extracted 5xx fields and displayed Bib_ID and Brief Title
Converting Access SQL to Analyzer

- In Access open your query in SQL view.
- Select and copy the SQL text.
- Paste the SQL into a text editor such as Notepad.
- Modify the SQL *

* Required SQL modifications include: delete semicolon, change double to single quotes, modify aliases, remove prompts and re-add, remove order by statement and replace in Page Explorer, and remove distinctrow.
Converting Access SQL to Analyzer continued

◆ In Analyzer
  – Select New > Blank report.
  – Go to Query Explorer and highlight queries.
  – Drag SQL object to workspace.
  – In Properties, click on Data Source.
  – Click ellipsis and choose Voyager.
  – In Properties, click SQL.
  – Click ellipsis and paste your SQL from text editor.
  – Validate.
Query Explorer – SQL conversion

SQL object

Data Source - Voyager

SQL – click ellipsis to open window
Converting Access SQL to Analyzer continued

- In Analyzer
  - Go to Page Explorer.
  - Choose Page 1.
  - From Insertable Objects pane, choose the Data Items tab.
  - Drag Query1 to the workspace.
  - Edit and format as needed.
Viewing SQL in Report Studio

- Query Explorer > Queries.
- Highlight query.
- In Properties pane, select “Generated SQL/MDX”
- Select the ellipsis to display the SQL.
- Note dropdown to change SQL type.
- Warning! Conversion is one way! You can not “unconvert”.
Viewing SQL Screen shot