

Reporting

This feature is only available to users with Pure roles of editor, reporter or administrator.

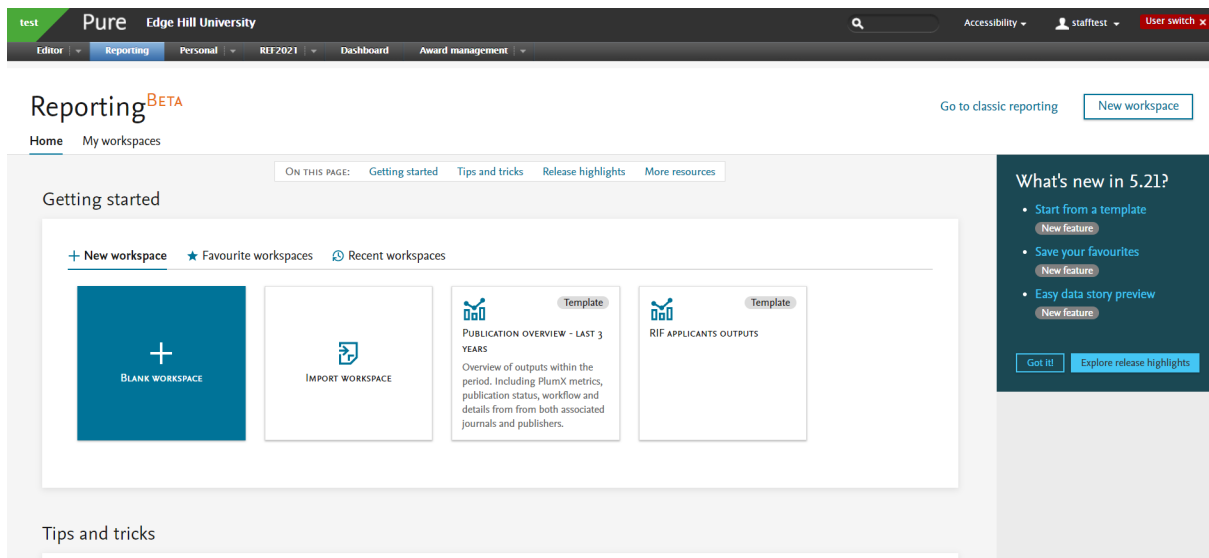
Guide updated 06/12/2021

Contents

Reporting Home Page.....	2
The basics.....	2
Workspaces.....	2
Shared by institution.....	2
Shared with me.....	2
Created by me.....	3
Using the reporting module.....	3
Report templates.....	3
Data tables.....	3
Driver variable.....	4
Managing organisational unit.....	4
Value.....	4
Value display options.....	5
Expand mode.....	6
Filter.....	6
Split.....	7
Related content.....	7
Data stories.....	8
Editing data stories.....	8
Create a report.....	9
Save a report.....	9
Share a report.....	9
Editing shared reports.....	10
Export a report.....	10
Export to Excel.....	10
Export to JSON.....	10

Reporting Home Page

- If you have a reporter user role in Pure, you will see **Reporting** at the top of your screen. This takes you to the reporting home page.
- If you have an editor role in Pure but do not have the **Reporting** button, you may still be able to view/create reports so [click here](#) and log in as normal if prompted.
- The reporting home page contains links to help you find existing reports or create a new one, tips, and information on recently added features.



Before you go to the trouble of creating a new report of your own, check if a suitable one has already been shared with you by us or your colleagues: you can make changes to one of these and it won't affect the original template.

The basics

Workspaces

- *Workspace* is another term for reports in Pure. If you click on *My workspaces*, there are three categories of workspace.

Shared by institution

- Reports other users have shared with everyone who has the necessary reporter role to view them.

Shared with me

- Reports other users have shared specifically with you (by name) and possibly with others.

Created by me


- Reports you have saved. You may or may not have shared some of these.

Tip: if you check these three areas in the order listed above you might find we have done the hard work for you and already created the report you need!

Using the reporting module

- When you first click on a report in *My Workspaces*, you will be given a preview of the *data stories* (like a dashboard for that report – [see below](#)).

Tip: The underlying *Data tables* (see below) of a report can be complex so you may only need to use the data stories preview on this screen.


- If you still need to see the underlying data tables, you can click  to open the whole report.

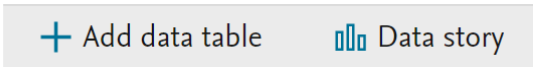
Report templates


- When you open a report, you are really opening a report template.
- You can only see/create reports if you have reporter rights for the report's *driver variable* (see below).
- You can share templates with other reporters who will see the same report layout but only containing data to which they have access e.g. relating to their own department.

If a template has been shared with you, you cannot save changes to the original template; you can only save a copy to your *Created by me* workspace.


- Reports in Pure are live, always showing the current data in the system, whether you created the report, or it was shared with you.
- When you open a report, there are tabs along the bottom of the screen. These represent the basic structure of a report.

 Data table (1) 2 | 1 ...

 + Add data table

 Data story

Data tables

- These are where you build the report by selecting and customising values.
- Think of them like basic spreadsheets containing your raw data.
- What you can include in your data table, depends on the table's driver variable (see below).
- You can add more than one data table in a single report template, and they could even be based on different driver variables.
- You can rename or delete your data tables by clicking  on the tab, but you cannot move them left or right along the bottom of the screen.

Driver variable

New Reporting <<

Create new workspace

Saved workspaces

Create new workspace

Choose the content type that sets the starting point for the report.

For instance, if you want to create a workspace containing Persons and their number of publications, select 'Persons'.

Editor

- Research outputs
- Applications
- Awards
- Projects
- Milestones

Import existing workspace

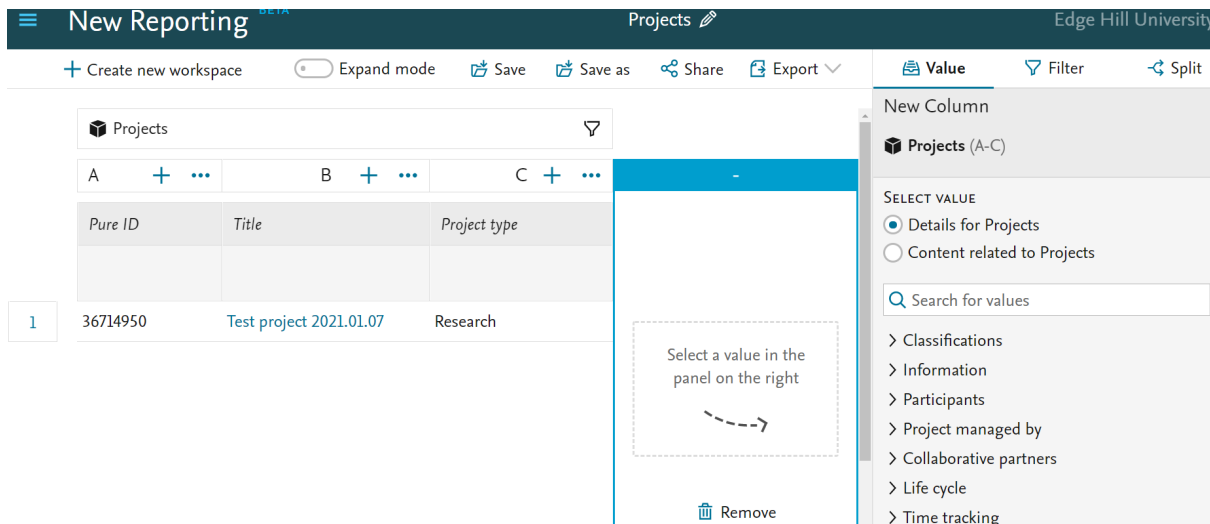
- This is the root variable of your data table (e.g. projects, research outputs, applications, awards, etc.) and determines what else you can see in the table.
- While you can add [related content](#) values (e.g. outputs related to driver projects), the driver variable is always the leftmost content type on a data table.

Managing organisational unit

- Your data table will only show records from the driver variable if your Pure reporter role corresponds to those records' managing organisational unit.
- A record will not appear to you if the unit your reporting rights apply to is associated with the record (e.g. through a co-investigator) but is **not** its managing organisational unit according to Pure.
- A record can only have one managing organisational unit. This helps avoid double-counting, but it means researchers collaborating across units need to agree between them early on whose department will 'manage' (e.g. report) the record and ensure the managing organisational unit field is set correctly when creating the record in question.

Value

- Think of values as the columns on a spreadsheet. They contain the data you want to report on and act as the fields available to your [data stories](#).
- When you click on a column you can:
 - Select another value to replace it from the pane on the right-hand side of the data table.
 - Click the plus symbol to insert a new value immediately to its right, selecting which value gets added from the pane on the right.
 - Click *Add column* to insert a new one at the end of the section, selecting a value from the pane on the right.

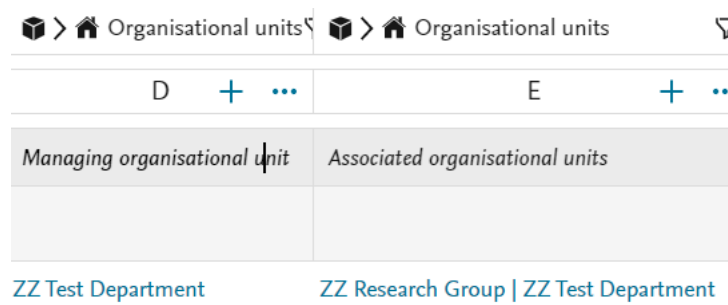


Value display options


- Use **...** at the top of the column to sort the data, move the column left or right along the data table, or remove (delete) it.
 - If you have a field that contains multiple pieces of data (e.g. multiple collaborators' names), you will have the option to change the view from *Default preview* (e.g. showing the text 'name (+ 2 more)') to *Wide preview* (listing each name in the same cell, up to 100 per cell).
 - You can then use **...** to change the *Wide preview* 'delimiter' from the automatic double slash (//) to pipe (|) or comma.
 - Consider how your delimiter choice looks on screen (too many commas?) or works if you export to Excel (// cannot be used as a 'text to columns' delimiter in Excel).

Default preview	Wide preview (double slash delimiter)	Wide preview (comma delimiter)	Wide preview (pipe delimiter)
Connors, Kurt (+2 more)	Test, Staff // Test 2, Staff // Connors, Kurt	Test, Staff, Test 2, Staff, Connors, Kurt	Test, Staff Test 2, Staff Connors, Kurt

- If you have a numerical field, you will have the option to use the [Split function](#).
- Click the title at the top of the column and you can rename it e.g. if you have columns for managing and associated organisational units, they would both display as *Organisational unit name* by default.
- Using wide preview and renaming values can help viewers understand the data both on screen and if exporting your data table to Excel.



Expand mode

- *Wide Preview* expands the data in the selected column horizontally.
-  Expand mode at the top of the data table expands **every** column **vertically** by creating a new row for every cell containing more than one piece of data.
- **Expand mode can be useful but should be used with caution: it expands all columns in the data table.**
 - **Any cell containing expandable data** will expand into as many new rows as it needs but **this effect will repeat** as you add more expandable values to your data table.
 - e.g. if a record in your report has 4 collaborators and 4 keywords, expand mode will generate a new row for each of the 4 collaborators **and** a new row for each of the 4 keywords *against each of the collaborators* (4 x 4 = 16 rows for one record), and so on.
 - **Any cell not containing expandable data** will be duplicated in each generated row belonging to that record (there will be no blank cells), so beware of double counting of numerical data, especially when exporting to Excel.
 - e.g. as expand mode generates 16 rows in the previous 4 x 4 example, if that report contained a funding amount, that amount would appear 16 times, both on screen and in exports; calculating a sum total for that column in an Excel export would give an incorrect figure.

Filter

- You can apply filters so your data table shows only certain records.
- Filtering records out of your data table will also hide them from your data stories.
- Click on a field and then select the desired filters from the pane on the right-hand side of the window.
- They take the form of a date range, text input (for multiple selections), checkbox (for multiple selections) or radio button (for single selection).
- Adding a filter to related content will only hide data from the related content columns on your data table; it will not hide the driver variable record (the row).
- When filtering on a year/period, you can select whether it works on calendar years (January to December) or academic years (August to July).
 - Please note: if an output only has a publication year (not day or month; e.g. just 2018), filtering a report on publication *academic* year will result in that publication appearing in **both** academic years that fall inside the calendar year of publication (e.g. 2017/18 and 2018/19) because Pure cannot tell which of the two possible academic years is relevant.

Split

- If you have a numerical field in your data table – a count or amount – selecting that column and choosing *Split* on the right or clicking **⋮** at the top of the column will give you the extra option of splitting the column data according to pre-set criteria e.g. type, year, etc.
- When you choose to split a column, select the criterion from the pane on the right-hand side of the window and you will be given a series of checkboxes.
- Select them **in the order you want them to display**, and your data table will update.
- Splitting a value opens new possibilities for your [data stories](#).

Related content

- Your data table can contain content types other than your driver variable.
 - For example, a project report can show any other content associated with each project – outputs, funding, activities, even internal or external people and organisations.
- When adding a new value (as above), change the radio button in the *Value* menu from *Details for [the driver variable]* to *Content related to [the driver variable]*.
 - You will be presented with all the related content types available to you based on your driver variable.

The screenshot shows the 'New Reporting' interface. At the top, there's a navigation bar with 'New Reporting BETA', 'Projects', and 'Edge Hill University'. Below that, a toolbar contains 'Create new workspace', 'Expand mode', 'Save', 'Save as', 'Share', and 'Export'. The main area displays a table with columns A, B, and C. The table has a header row with 'Pure ID', 'Title', and 'Project type'. Below the header, there is one row with values: '36714950', 'Test project 2021.01.07', and 'Research'. A 'Value' panel is open on the right, showing options for 'SELECT VALUE ON RELATED CONTENT' with radio buttons for 'Details for Projects' and 'Content related to Projects'. The 'Content related to Projects' option is selected. Below this, there are sections for 'Persons' (Participants, Principal Investigators, Co-Investigators) and 'Organisational units' (Associated, Managed by). A 'Remove' button is at the bottom of the panel.



Tip: Related content is always grouped in a separate section of the table from its driver variable and from other related content types. Track these groupings using the section headers and icons along the top of the table. You can move a column within its own grouping (e.g. related outputs) but not into another grouping (driver project).

- Whether you see data in related content sections depends on:
 - The record in the driver variable having been [related to a record](#) in the other variable (e.g. a project with no applications related to it in Pure,

means the cells in the related applications section of your report will be empty for that project).

- The related content's visibility setting. If this is set to confidential (as with applications and awards), you will only see it in your report if you also have reporting rights for the related content type.
- You can use each related content type like an additional driver variable from which you can select related content.
 - You can use this functionality to report on **indirect relationships** e.g. show the related content of people named on a driver project, **then** from the people variable, you can show the related content of research outputs those people are named on, even if those outputs may not be related to the initial driver project.
- You can move fields left or right within a content type grouping but you cannot move an entire content type left or right along the data table.
 - Plan ahead so your related content groupings appear in the right order for your needs.
 - Adding a new related content type inserts it immediately to the right of its own driver variable grouping.
 - Any related content previously added to the same driver variable is pushed to the right of the data table to make way for the new one.

Data stories

- These are visualisations of the data using the fields added to your data tables.
- You can combine charts, tables, and text boxes to build a dashboard on the *Data story* tab.
- It is always the rightmost tab and you cannot rename it.
- You can send the entire *Data story* tab to a printer or PDF using  Print at the top of the page.
- You can export some individual data stories to Excel for further analysis outside Pure using  Export at the top of each visualisation.
 - When exported to Excel a data story table will not have a total count row and the rows may be in a different order versus your browser.

Editing data stories

- You **can** add data stories to the *Data story* tab using data from any or all the data tables in the same report template.
- You **cannot** pick fields from multiple data tables to use in a single data story e.g. a chart can only use data from one data table at a time.
- There is only one data stories tab per report template so you will need to consider how much information you need to present in that report template.
- At the time of writing, the only editing you can do on the *Data story* tab is:
 - Add/remove data stories and move them up or down the page.
 - Change/re-order the values that make up each data story.

- Rename each data story.
- Any other changes must be made in the data tables that feed your data stories. The structure of your data table will affect what you can include in your data story, for example:
 - Rename your data table columns if necessary so you can tell them apart when picking values for your data stories/to aid interpretation.
 - [Splitting](#) a value can make your data story more useful e.g. split the number or funding amount of applications by application type and you could present a data story that shows count/value by application type.
 - If your data table has any filters applied, your data stories will only show the filtered data. Anything filtered out of the data table will not be represented in the associated data stories.

Create a report

Tip: check under *My Workspaces* before trying to create a new report – you might find we have done the hard work for you and already created the report you need!

- Click on Create new workspace.
- Select your driver variable.
- Build your data table(s) by selecting the required values.
- Where appropriate, make use of column renaming, wide preview, filters, splits, related content, and data stories, as described above.
- Note:
 - When adding person names to a report, including separate *first name* and *last name* columns may result in the PI and Co-I names being mixed up. Use a single full name value where available instead e.g. *name* or the combined *last name, first name* value.
 - Where available, *effective start date* is derived from *actual start date* (if set), otherwise *expected start date* (if set).
 - Where available, *effective end date* is derived from *curtailed date* (if set), otherwise *actual end date* (if set), otherwise *expected end date* (if set).

Save a report

- When you have completed your report, you can save it using the button at the top of the window.
- Name it and add a description and category.
- You can edit the name at any time later, using the pencil icon at the top of the reporting window, but you cannot edit the description or category later.

Share a report

- You can share your report with any user at EHU with reporting rights for the driver variable content type.

- Simply click *Share* at the top of the page and type their name to find them.
- Click *Confirm share report* to share it.
- They will **not** receive a notification.

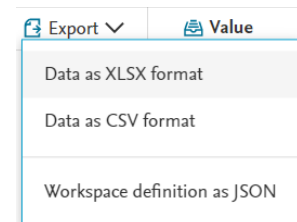
Editing shared reports

- If you **save changes to a shared report you did not create**, it creates a copy of the report just for you under *Created by me*.
 - The original template is unaffected and remains available to you under *Shared with me/Shared by institution*.
- If you **save changes to a report you have shared with others**, it will change the report template that is available to those other users under *Shared with me* or *Shared by institution*.
 - If you delete it, you delete it for all users.
 - If your user account is deleted for any reason, any reports you shared will be deleted from all users' accounts.
 - Changes to or deletion of a report you have shared will **not** affect a copy of that report the recipient saved themselves in their *Created by me* workspace.

Export a report

Export to Excel

- You can export a data table to Excel in either XLSX or CSV file formats.
- You may want to do this to carry out further analyses of the information or to save a snapshot of the data.
- With the report open, click *Export* (along the top), then choose your Excel format.




Remember: if you share your XSLX or CSV file with anyone else, it is **not** just a template: **they will see the data** it contains, and **you have no control** over what happens to that information once shared.

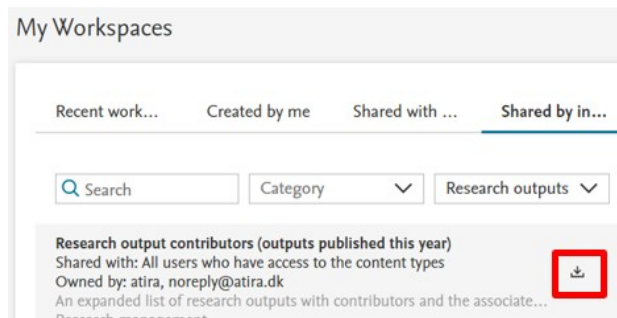
Export to JSON

- When you share a report ([as above](#)) you share a live template that can only be edited by you and only seen by other Edge Hill Pure users with the necessary reporting rights.
- If someone else at Edge Hill is responsible for ongoing management of the report, or you need to share the template with a Pure user at another institution, you can share the *report definition* with them instead of the live template.
- This is a copy of the template in a JSON file that you send to another Pure user (anywhere) as a file/attachment which they import into Pure as their own (below).

The JSON file does not contain any report data, only the layout and settings of its data tables and data stories.

It is a snapshot of the template at the time of export; any changes made by you in Pure after exporting the JSON file will not carry over to the export file or to the report in the Pure account of the person who imports it.

- To export the report definition:
 - Click  next to the report on the reporting module landing page or under *Saved Workspaces* in the reporting window.
 - Or, with the report open, click *Export* (along the top), then *Workspace definition as JSON*.



Import a report

- If someone shares a JSON report definition with you, you import it into Pure by clicking *Import existing workspace* on the report module landing page or under *Create new workspace* in the reporting window.
- You must have saved the JSON file to your device. Locate and import it and the report will open.
- If you want to keep the report to access again, save it before closing.
- After saving, the report will be available to you under *Created by me*.
- You can edit and share it as with any you create yourself. Changes you make will not affect the creator's version and changes they make will not affect yours.

