ATLAS SYSTEMS
TRAINING & LIBRARY SOLUTIONS

In a Nutshell:

Ares Reporting Overview (With minimal Direct SQL Querying. ….Sigh.)

Ares Reporting Overview

"It is a capital mistake to theorize before one has data. Insensibly one begins to twist facts to suit theories, instead of theories to suit facts."

— Arthur Conan Doyle

Ares Reporting Overview

- Methods of Ares Reporting:
  - SSRS (SQL Server Reporting Services)
  - Custom Query
  - ODBC Link-Based Methods (Open Database Connectivity)
  - Direct SQL Querying

- But first things first:

  How do we get there?

Ares Reporting Overview

- Database Connection SQL Logon
  - Hosted: For all hosted Ares systems (and a few self-hosted ones), we will set up and assign you a username and password to access the reports.
    - These credentials are then used to access the database, regardless of your reporting method.
  - Self-hosted: If you're self-hosting and setting up your own means to access your Ares data for reporting (by whatever method), make ABSOLUTELY sure that the SQL Logon being used to connect to the database is READ ONLY.
    - Collecting data for analysis does process.
    - Safety (and Data Integrity) First.

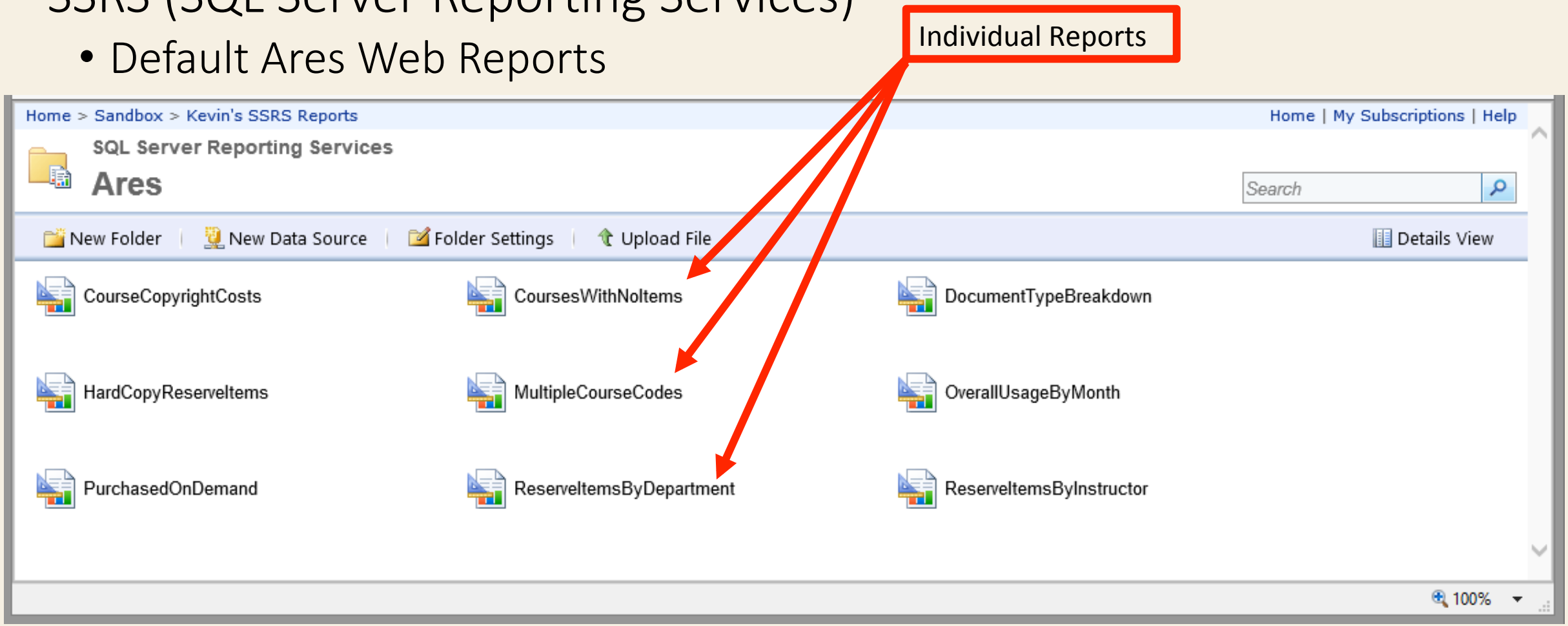
If you take nothing else away from this reports mini-presentation, take **THIS**.

Programs like MS Access, Excel, SSMS, etc. **WILL** alter your data if permitted to and instructed to, however accidentally.

ALERT
CONDITION: RED

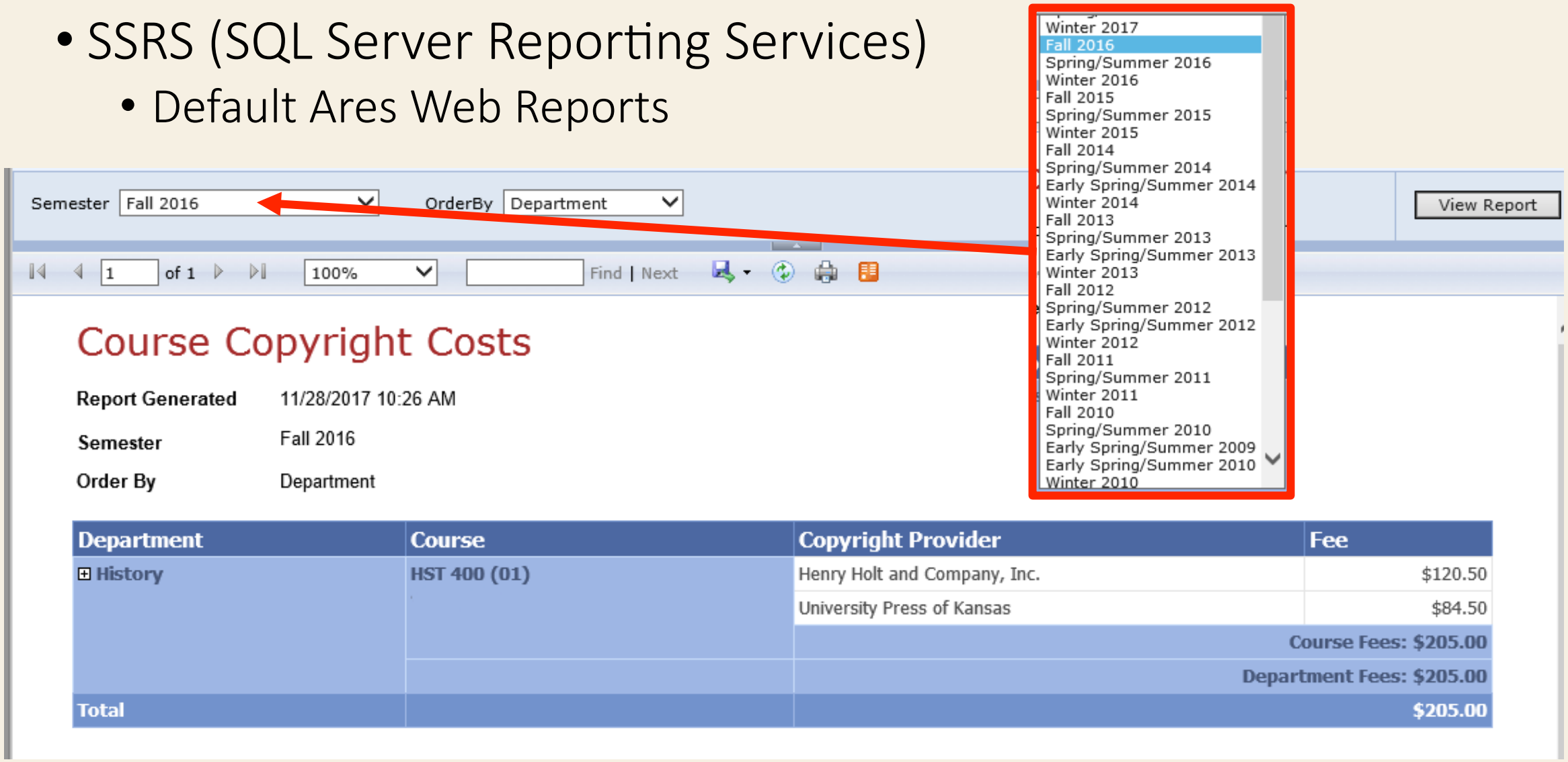
Ares Reporting Overview

- SSRS (SQL Server Reporting Services)
  - Default Ares Web Reports



Ares Reporting Overview

- SSRS (SQL Server Reporting Services)
  - Default Ares Web Reports



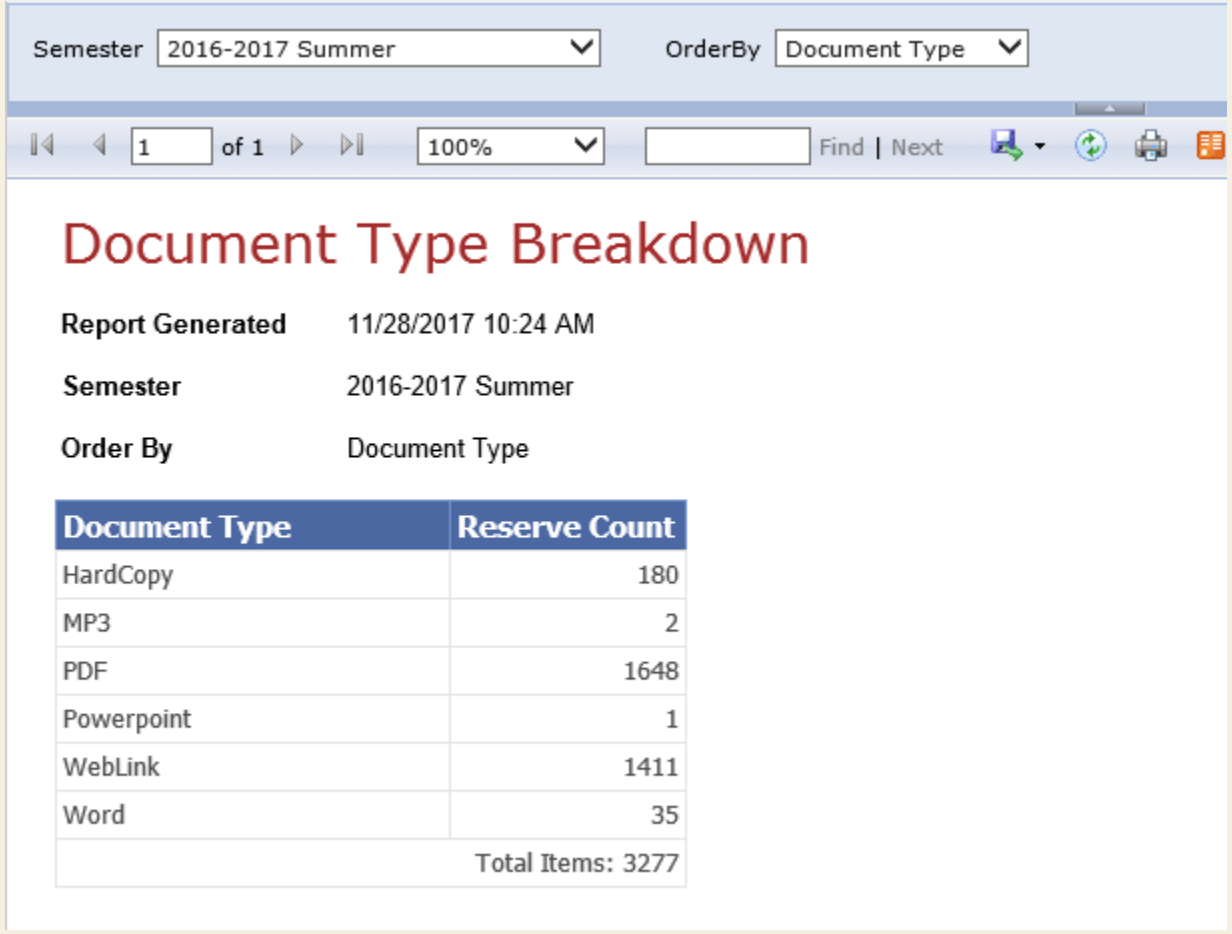
Ares Reporting Overview

- SSRS (SQL Server Reporting Services)
  - Default Ares Web Reports

Year	Month	Count
2017	February	24
	March	14
	April	13
	May	98
	June	41
	July	35
	August	31
	September	1,637
	October	2,098
	November	1,615
	Total	5,606
Total		5,606

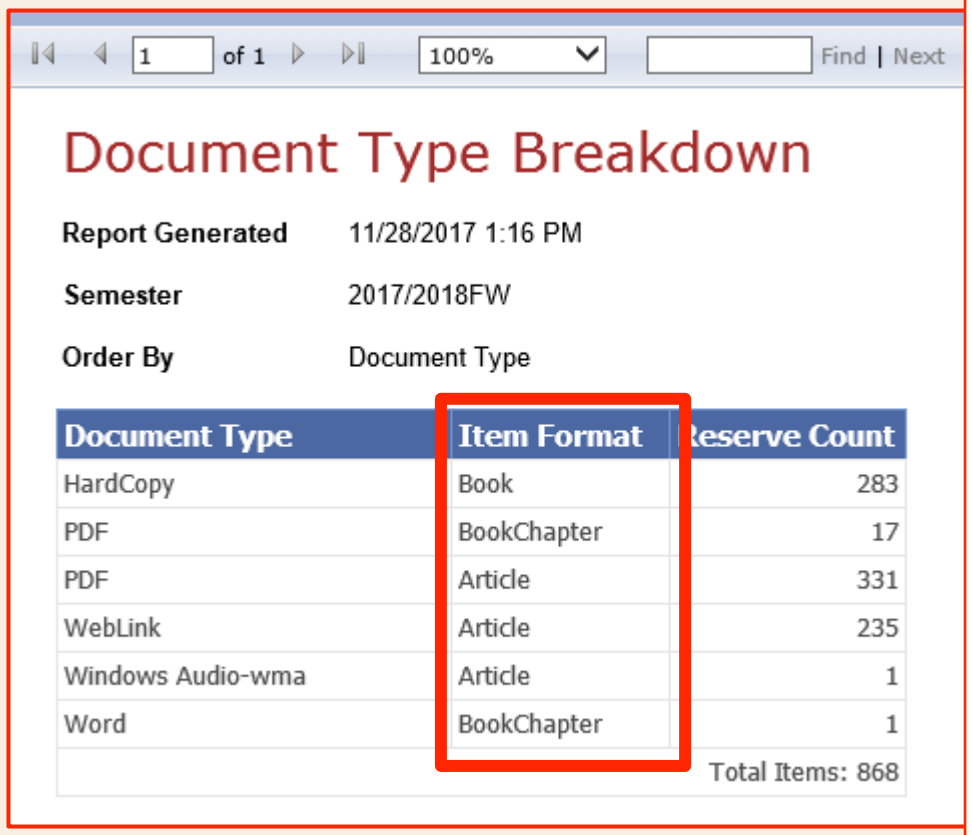
Ares Reporting Overview

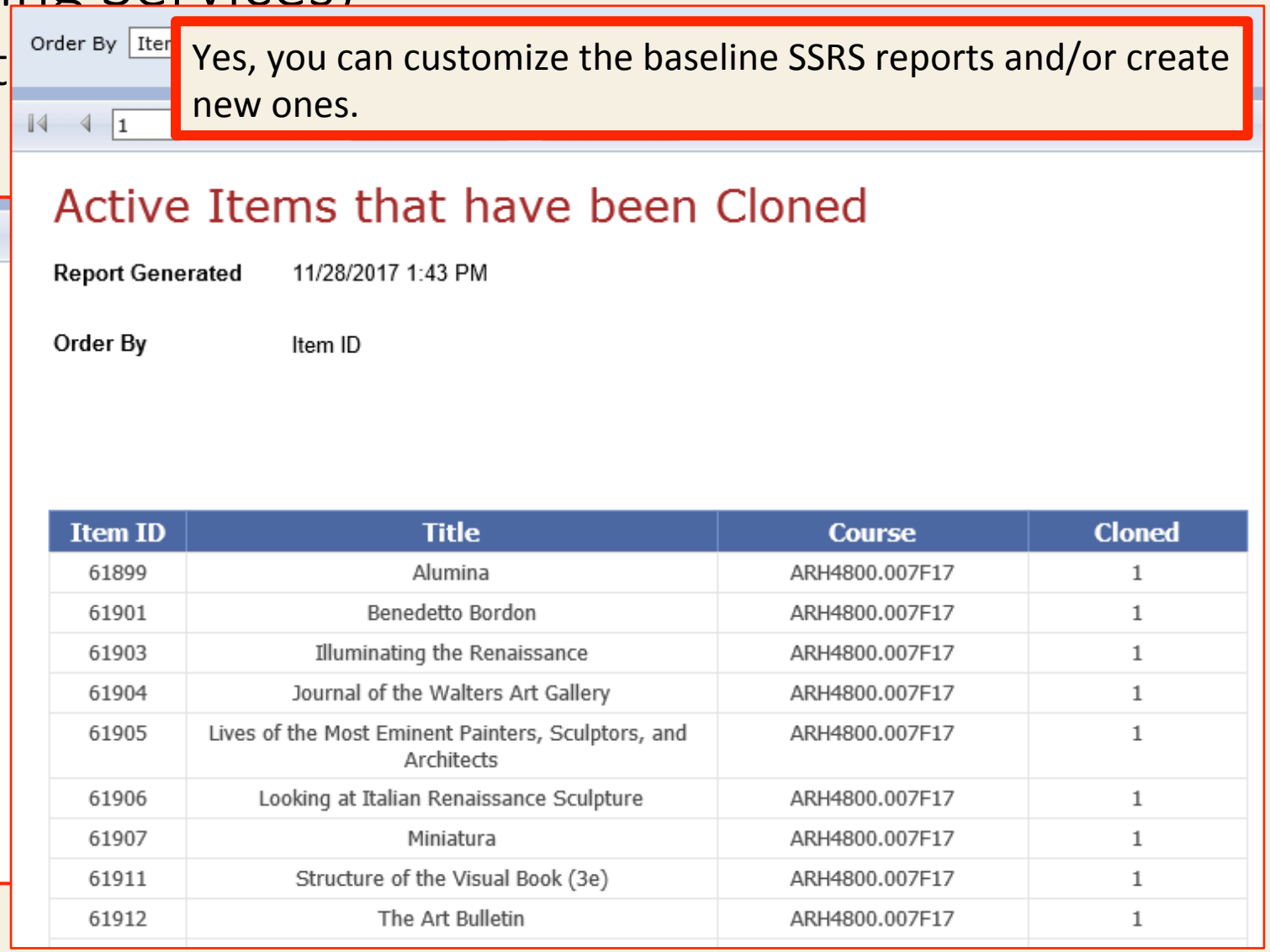
- SSRS (SQL Server Reporting Services)
  - Default Ares Web Reports



Ares Reporting Overview

- SSRS (SQL Server Reporting Services)
  - Default Ares Web Report
  - Custom Web Reports

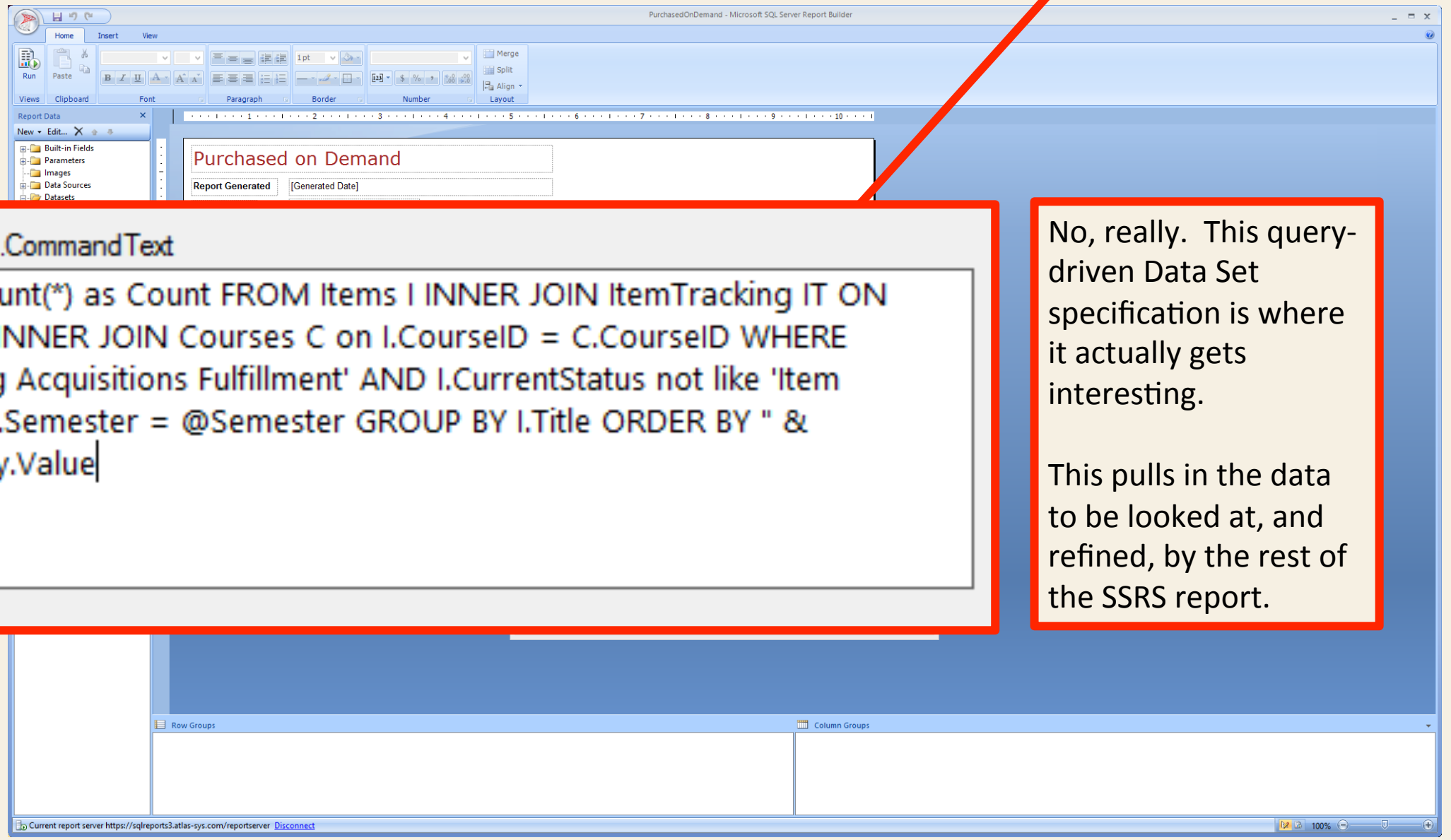




Ares Reporting Overview

Fun Stuff (SQL Query)

SSRS Reports are created u



Set expression for: Query.CommandText

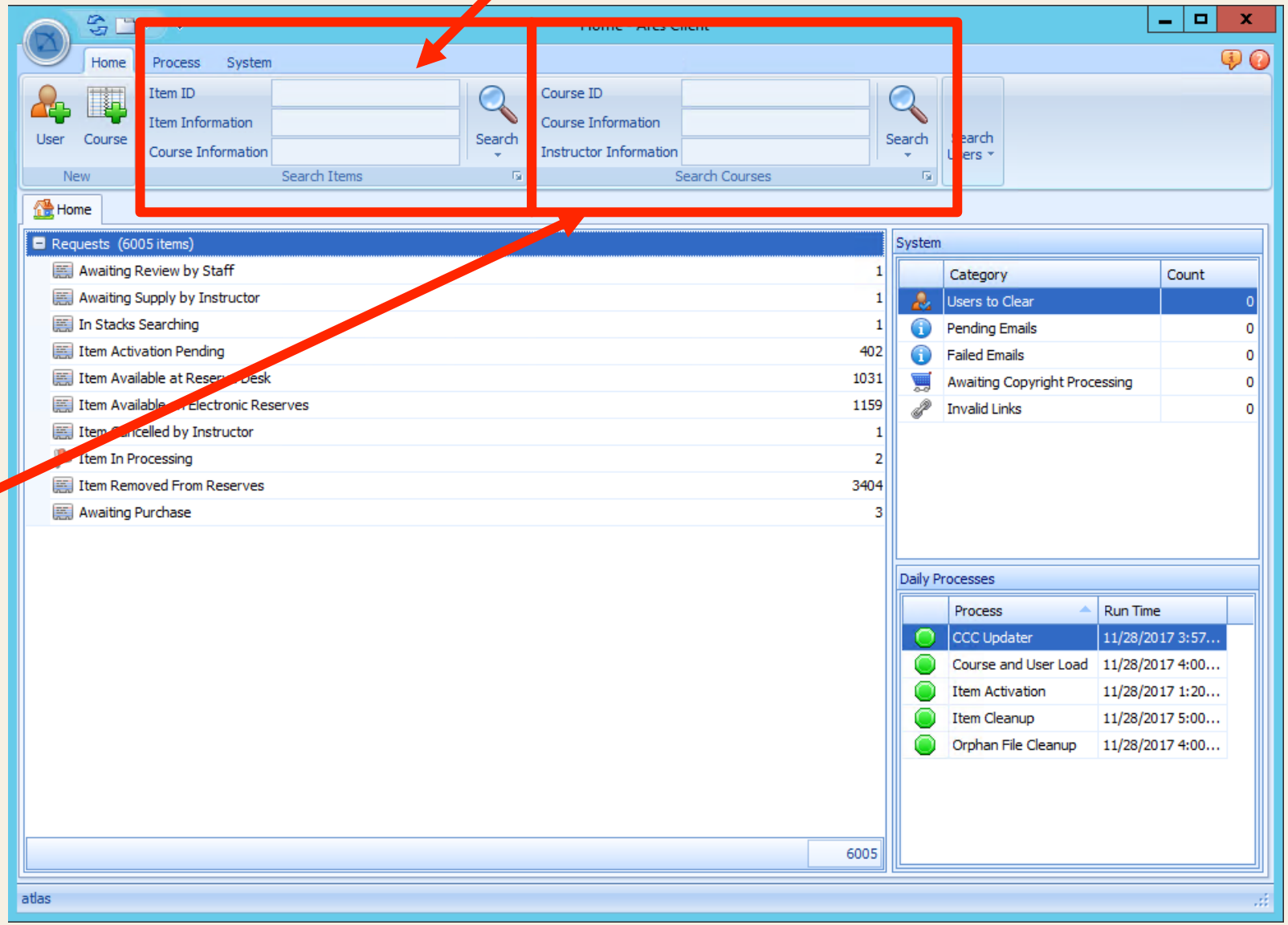
```
="SELECT I.Title, Count(*) as Count FROM Items I INNER JOIN ItemTracking IT ON
I.ItemId = IT.ItemId INNER JOIN Courses C on I.CourseID = C.CourseID WHERE
IT.Status = 'Awaiting Acquisitions Fulfillment' AND I.CurrentStatus not like 'Item
Cancelled%' AND C.Semester = @Semester GROUP BY I.Title ORDER BY " &
Parameters!OrderBy.Value
```

No, really. This query-driven Data Set specification is where it actually gets interesting.

This pulls in the data to be looked at, and refined, by the rest of the SSRS report.

Ares Reporting Overview

- Custom Query
  - Within the Ares Client

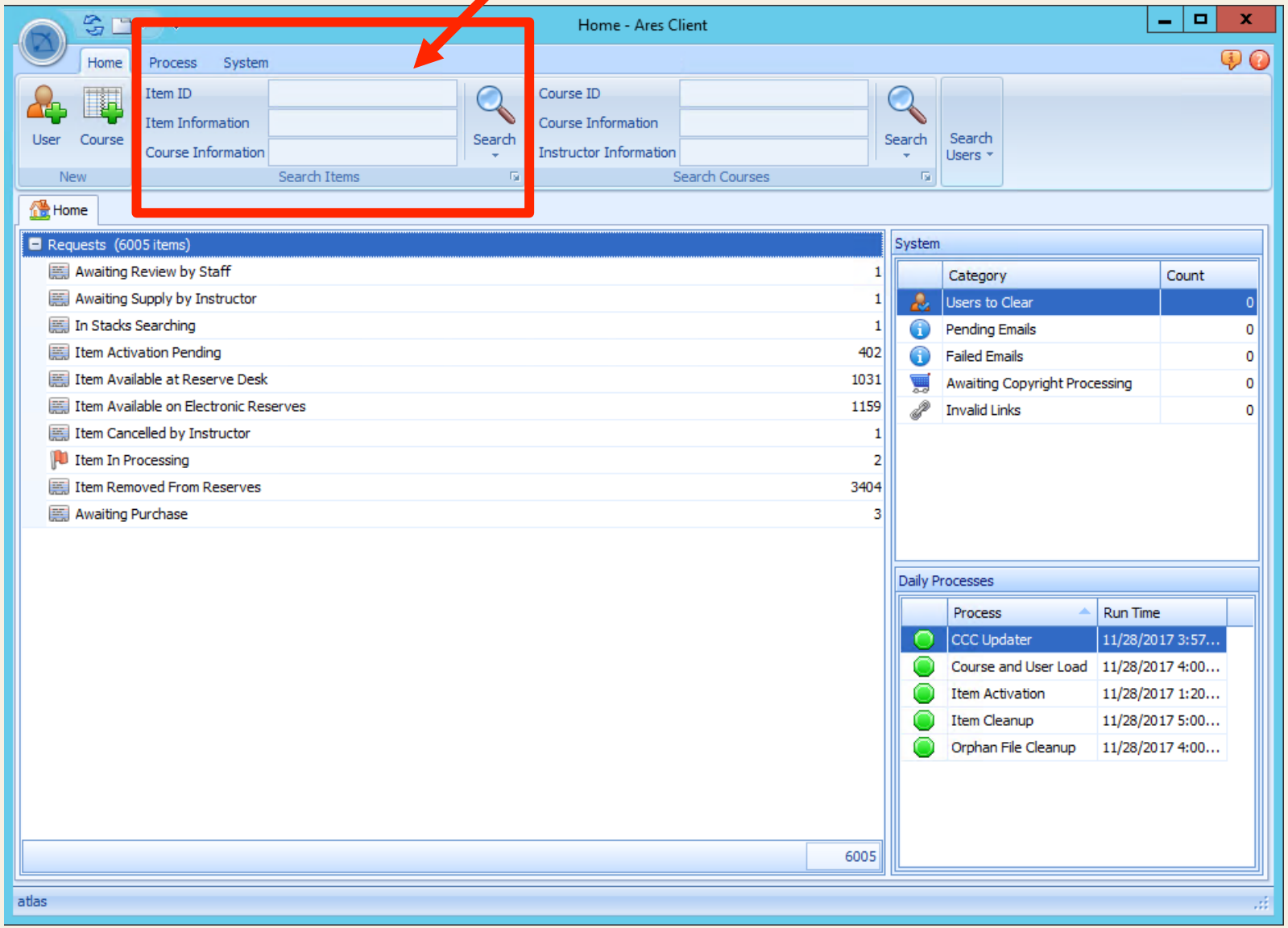


Note too that there's a "Search Courses" Section as well.

It works the exact same way. It just searches COURSES rather than ITEMS.

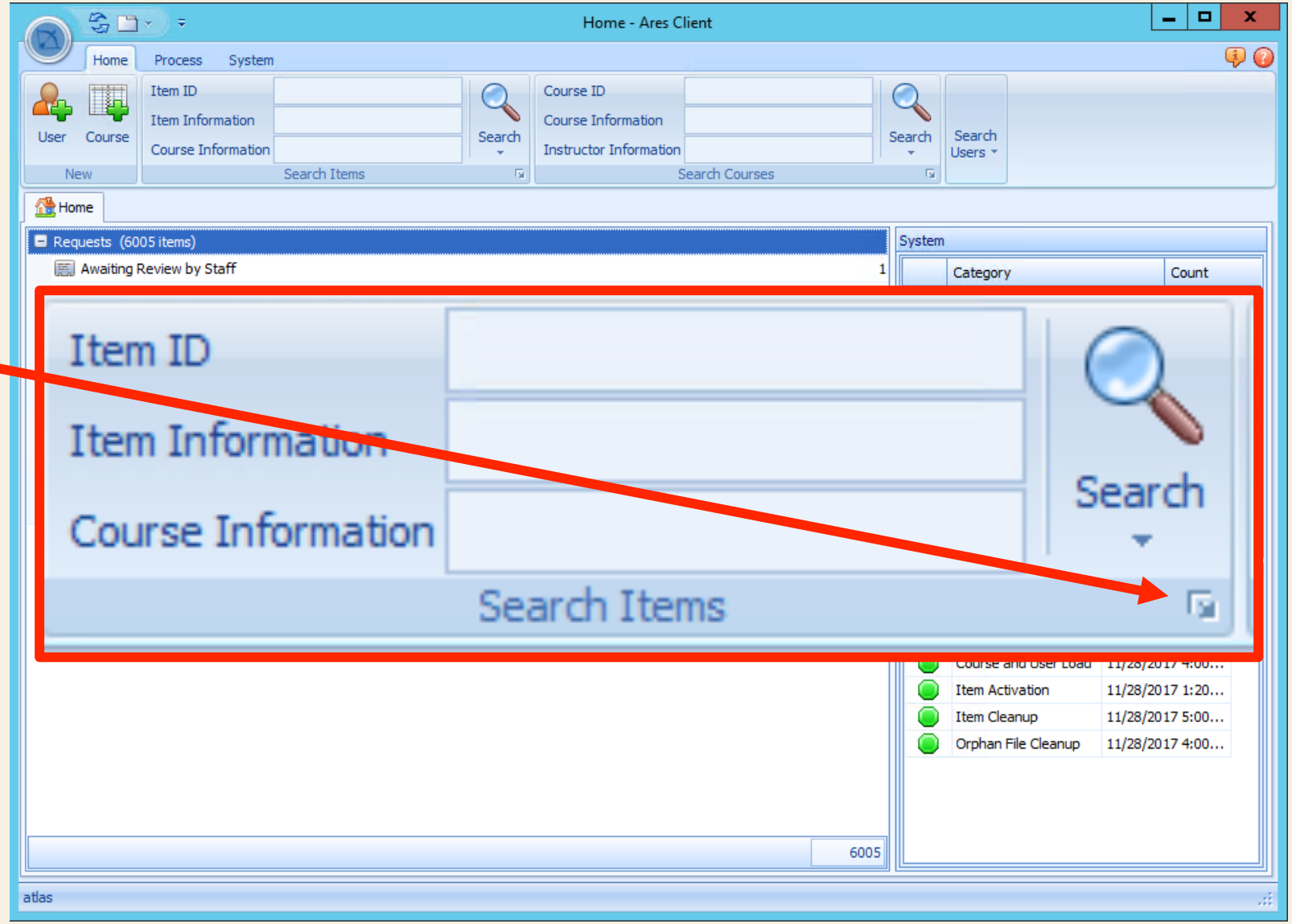
Ares Reporting Overview

- Custom Query
  - Within the Ares Client



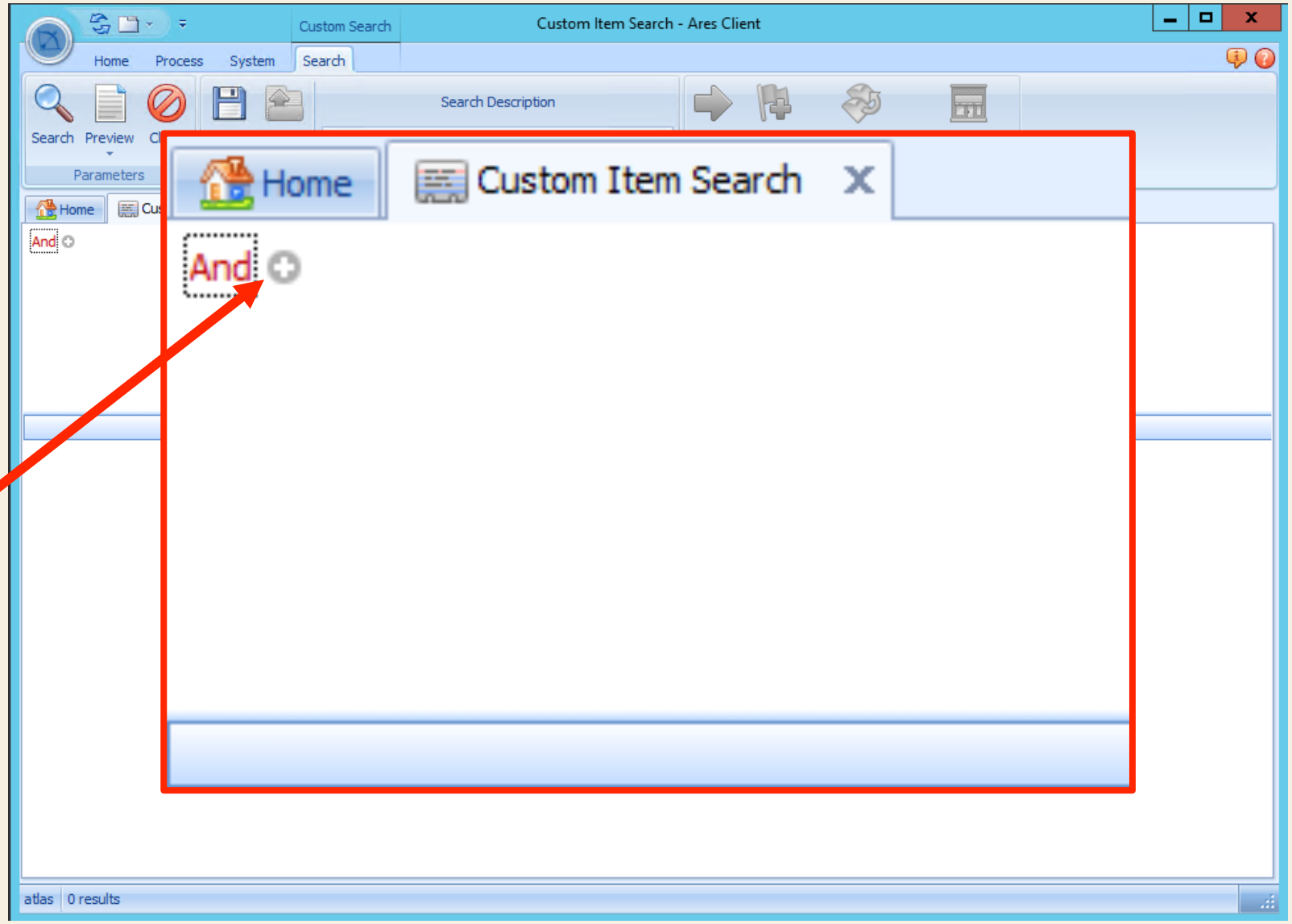
Ares Reporting Overview

- Custom Query
  - Within the Ares Client



Ares Reporting Overview

- Custom Query
  - Within the Ares Client



To select specific criteria for the search, click the plus symbol next to the “And”.

Ares Reporting Overview

- Custom Query
  - Within the Ares Client

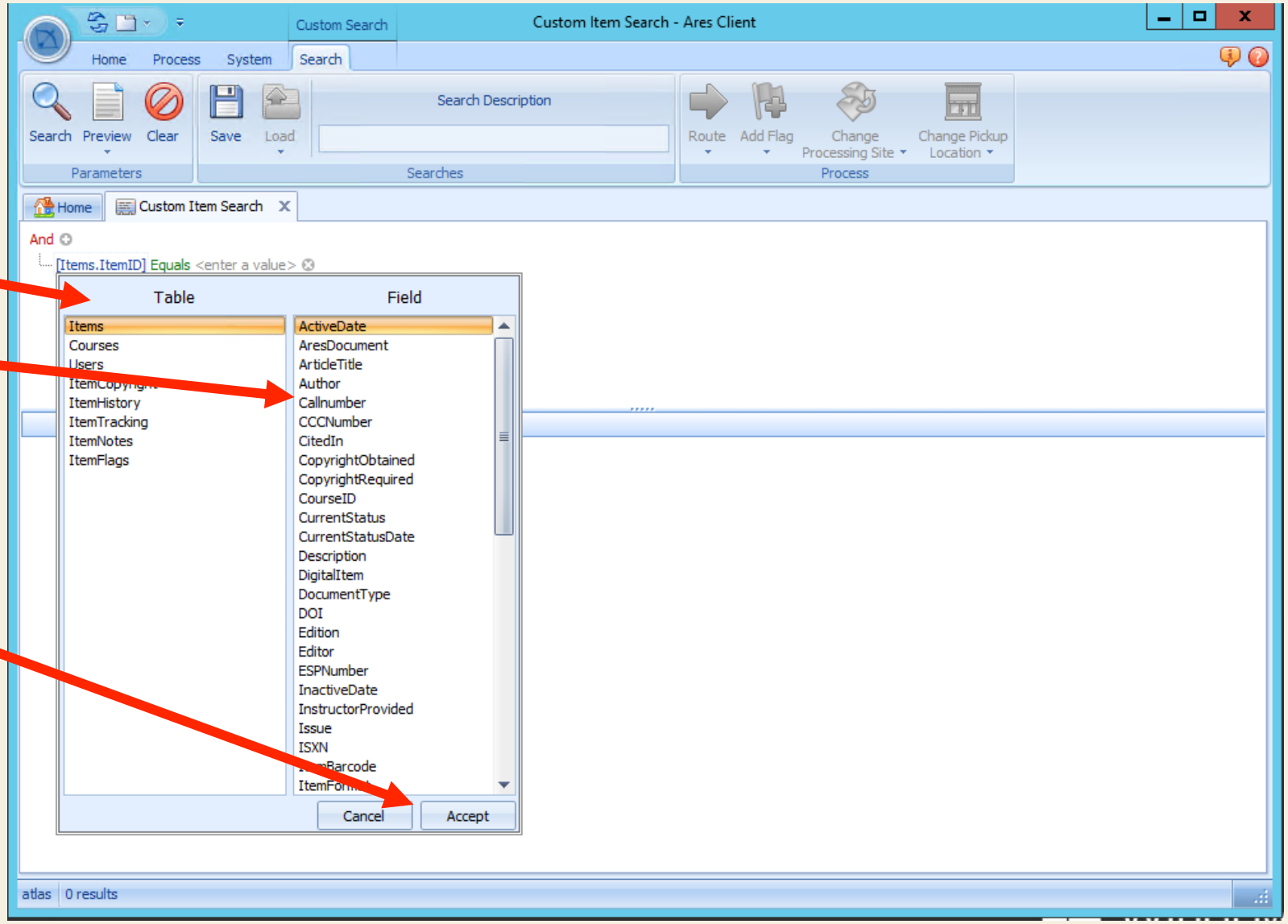
Select the Table

and Field

you're interested in.

Then Click the "Accept" button.

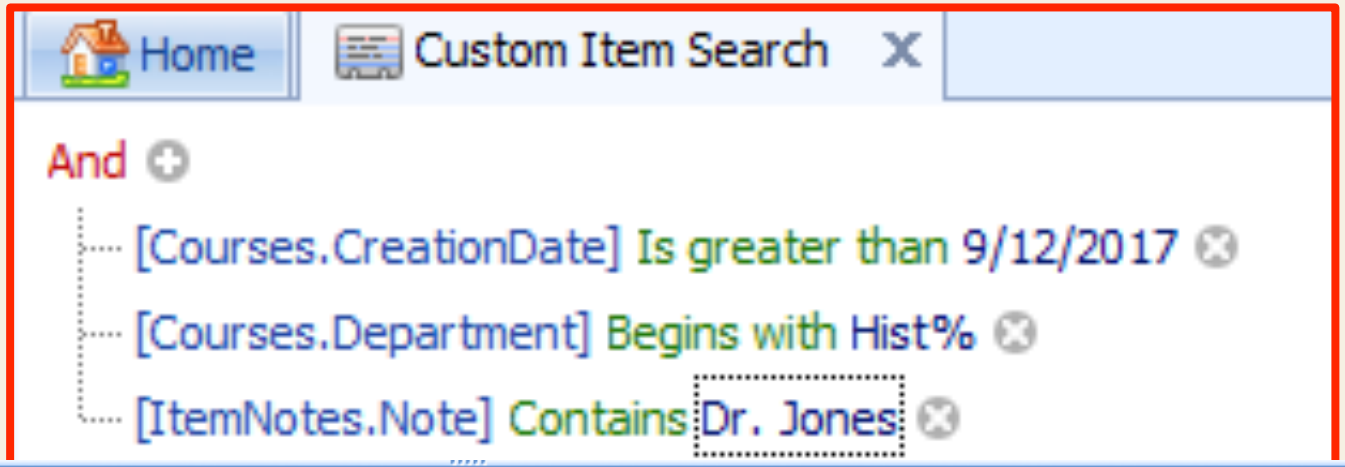
Rinse and Repeat as needed



Ares Reporting Overview

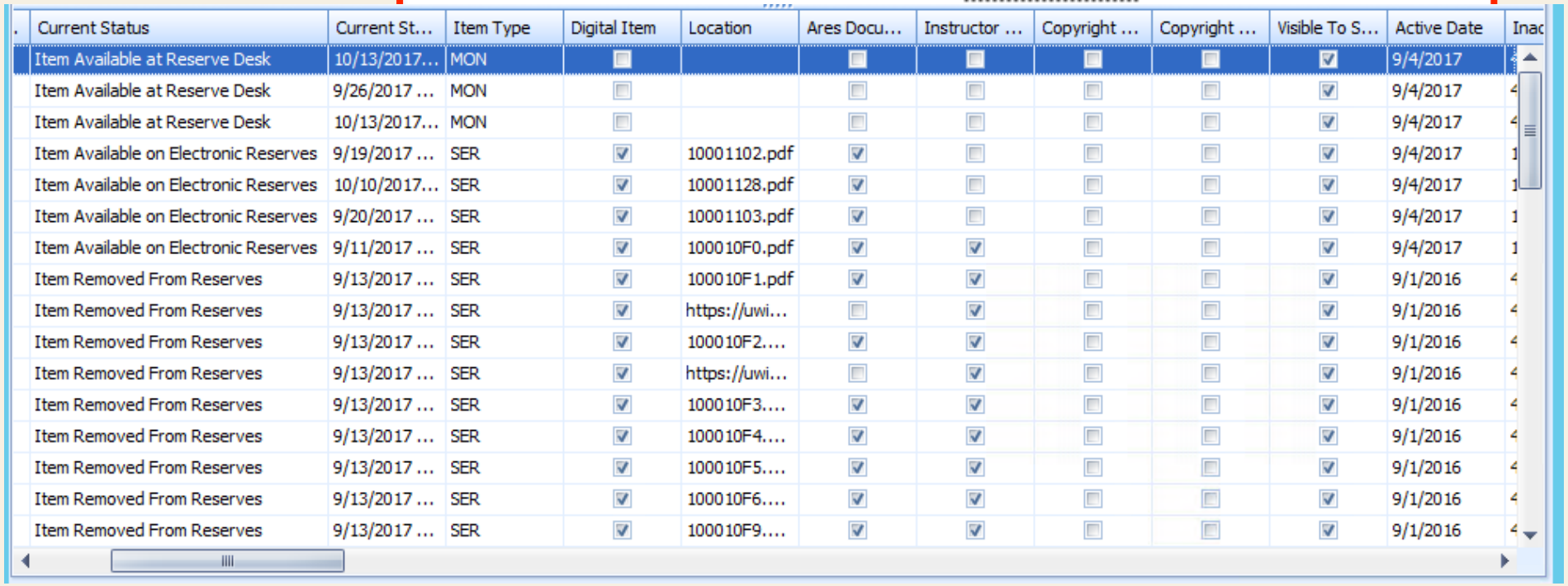
- Custom Query
  - Within the Ares Client

Build your search based on whatever specific criteria you need.



When you're happy with the search, click the "Search" button to see your results.

Results will display in the bottom results pane as they would with any other client search.



Current Status	Current St...	Item Type	Digital Item	Location	Ares Docu...	Instructor ...	Copyright ...	Copyright ...	Visible To S...	Active Date	Inac
Item Available at Reserve Desk	10/13/2017...	MON	☐		☐	☐	☐	☐	☑	9/4/2017	
Item Available at Reserve Desk	9/26/2017 ...	MON	☐		☐	☐	☐	☐	☑	9/4/2017	
Item Available at Reserve Desk	10/13/2017...	MON	☐		☐	☐	☐	☐	☑	9/4/2017	
Item Available on Electronic Reserves	9/19/2017 ...	SER	☑	10001102.pdf	☑	☐	☐	☐	☑	9/4/2017	
Item Available on Electronic Reserves	10/10/2017...	SER	☑	10001128.pdf	☑	☐	☐	☐	☑	9/4/2017	
Item Available on Electronic Reserves	9/20/2017 ...	SER	☑	10001103.pdf	☑	☐	☐	☐	☑	9/4/2017	
Item Available on Electronic Reserves	9/11/2017 ...	SER	☑	100010F0.pdf	☑	☑	☐	☐	☑	9/4/2017	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F1.pdf	☑	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	https://uwi...	☐	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F2....	☑	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	https://uwi...	☐	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F3....	☑	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F4....	☑	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F5....	☑	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F6....	☑	☑	☐	☐	☑	9/1/2016	
Item Removed From Reserves	9/13/2017 ...	SER	☑	100010F9....	☑	☑	☐	☐	☑	9/1/2016	

Ares Reporting Overview

- ODBC Link-Based Methods (Open Database Connectivity)
  - Used by:
    - Power BI (can also use a direct SQL connection)
    - Tableau (can also use a direct SQL connection)
    - Excel
    - MS Access
    - Essentially anything semi-useful that can connect that way.
  - Each of these tools works differently, but they all pull data from the database, filter and sort it by specific criteria, and allow you to display the data.
    - Power BI and Tableau, and to a lesser extent newer versions of Excel, are very graphics-oriented.

Ares I

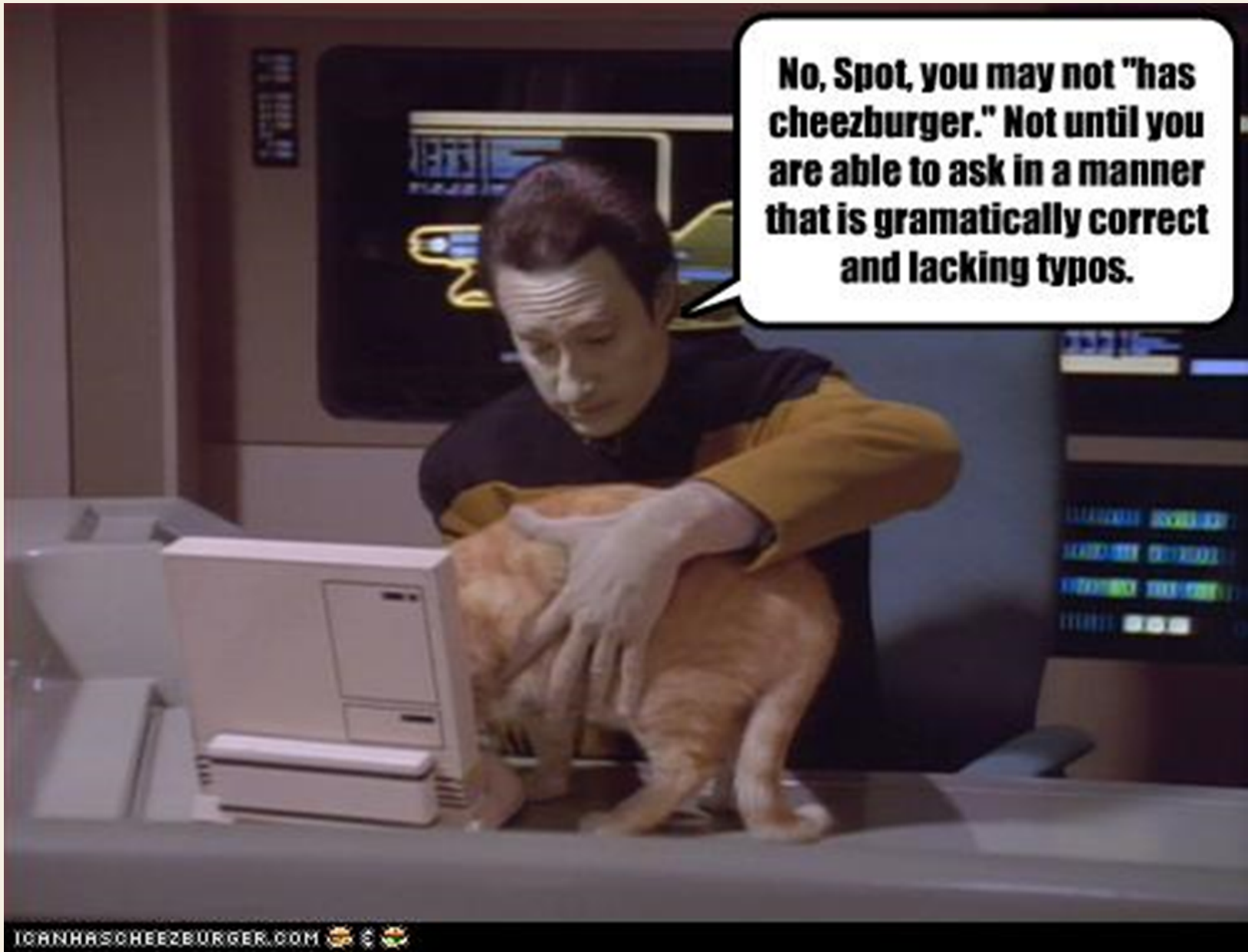
- Direct Queryi
  - SQL Man Stud

```sql
DECLARE @BeginDate DateTime, @EndDate DateTime, @SITECode nvarchar(10) ;

-- EDIT THESE VALUES BEFORE RUNNING SCRIPT --

SET @BeginDate = '2017-01-01 00:00:00';
SET @EndDate = '2017-07-01 00:00:00';

SELECT

MONTH(InitialDate.CreationDate) AS Month, DAY(InitialDate.CreationDate) AS Day, YEAR(InitialDate.CreationDate) AS Year     --, count(*) as Number

FROM Items

JOIN    (
        SELECT ItemID, Min(DateTime) as CreationDate
        FROM ItemHistory
        GROUP BY ItemID
        ) as InitialDate

        ON Items.ItemID = InitialDate.ItemID

WHERE InitialDate.CreationDate BETWEEN @BeginDate AND @EndDate

GROUP BY YEAR(InitialDate.CreationDate), MONTH(InitialDate.CreationDate), DAY(InitialDate.CreationDate)
ORDER BY YEAR(InitialDate.CreationDate), MONTH(InitialDate.CreationDate), DAY(InitialDate.CreationDate)



SELECT

MONTH(PatronUseDate.UseDate) AS M, DAY(PatronUseDate.UseDate) AS D, YEAR(PatronUseDate.UseDate) AS Y, count(*) as Number

FROM Items

JOIN    (
        SELECT ItemID, Min(DateTime) as UseDate
        FROM ItemHistory
        Where Entry in ('WebAccess')
        GROUP BY ItemID
        ) as PatronUseDate

        ON Items.ItemID = PatronUseDate.ItemID

WHERE PatronUseDate.UseDate BETWEEN @BeginDate AND @EndDate

GROUP BY YEAR(PatronUseDate.UseDate), MONTH(PatronUseDate.UseDate), DAY(PatronUseDate.UseDate)
ORDER BY YEAR(PatronUseDate.UseDate), MONTH(PatronUseDate.UseDate), DAY(PatronUseDate.UseDate)
```

Rectangular Snip

Ares Reporting Overview

- Direct SQL Querying
  - SQL Server Management Studio



Ares Reporting Overview

Kevin Ford
kford@atlas-sys.com

https://www.atlas-sys.com/

Ares Reporting Overview