



## Creating Reports Using Omniture® SiteCatalyst®

### Introduction

This quick reference is intended for librarians and library staff who use Omniture® SiteCatalyst® to create reports about WorldCat Local usage. Omniture® SiteCatalyst® is Web analytics software offering accurate real-time reports and customization.

<https://my.omniture.com/login/>

### System Requirements

Though SiteCatalyst® reports should function appropriately with most browsers, reports will look and function best on systems that meet the following recommendations:

- Browser: Microsoft® Internet Explorer® versions 5.5 and above
- Cookies: Required
- JavaScript: Enabled
- Operating System: Windows-based
- Macromedia Flash Player: version 6 or above
- Monitor Resolution: 1024x768 (800x600 is also acceptable)
- Color Depth: 16-bit or higher

Additionally, visitors to your site will be tracked most accurately if their Web browsers have JavaScript enabled.

### Logging On

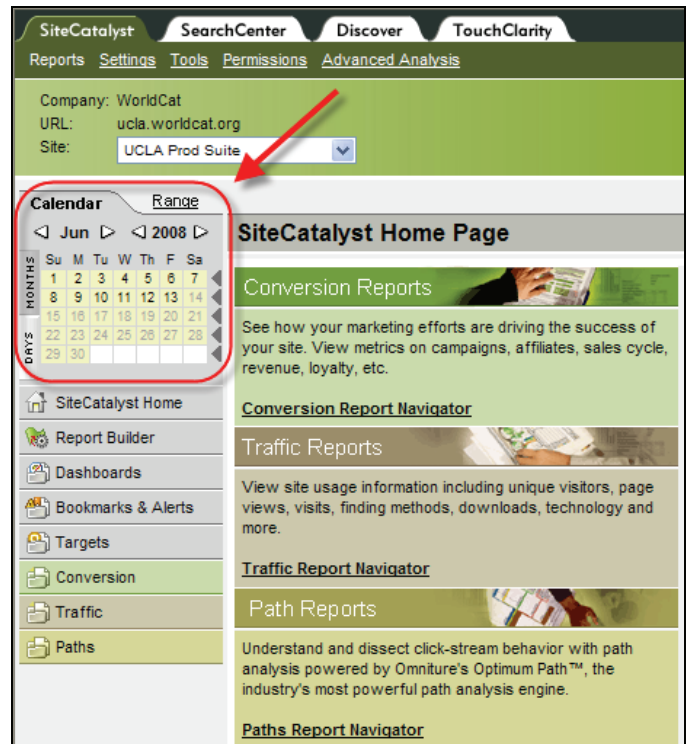
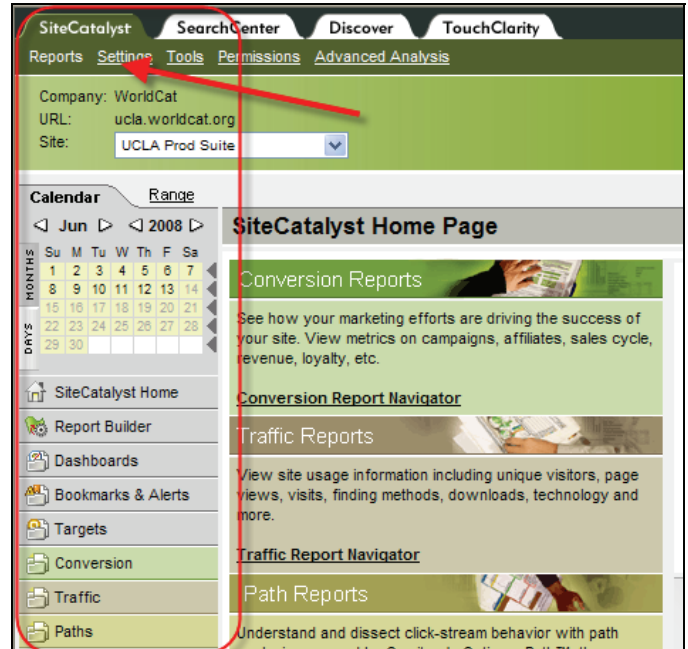
Enter WorldCat for the company name, then the username and password assigned to you by OCLC. You may be asked to agree to Omniture Enterprise terms of use.

### How to Create Common Reports

All reports can be created using the Reports menu of Omniture® SiteCatalyst®.

Reports are generated for a specific date or date range. To select a date or date range, use the **Calendar** at the top left side of the screen.

**Note:** When creating a report, it is best to use the Range value of "Last Month" or "Last 3 Months," etc. Then if you bookmark a report (see page 6), it will always remain that time period.



**To select dates:**

Step	Action	Result
1	Click a date on the <u>Calendar</u> to select one date. OR	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
2	Click <u>Range</u> .	
3	Select a preset date, or choose select From and To dates.	
4	Click <b>Run Report</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.

**Custom Insight Report Descriptions**

Report	Definition
<b>Custom Links</b>	<b>Do not use.</b> Test location for Fulfillment Option Click Counts. Data is not accurate.
<b>Internal Search Terms</b>	Reports all search queries sent to the search engine from anywhere on the site. This includes Subject and Author links.
<b>Number of Search Results</b>	Counts the search results returned for each search.
<b>Search Type</b>	Reports count of searches from various sources throughout WorldCat.org.
<b>Refined Search Criteria</b>	Counts usage of facet categories (Author, Format, Year, etc.).
<b>Language</b>	Counts pages viewed with different languages set in the user's browser.
<b>User Status</b>	Counts pages viewed by users in different authentication states, including: Unauthenticated, IP authenticated against a FirstSearch participating institution, LDAP authenticated (logged in to the Web site with their WorldCat account), and both IP-authenticated and logged in.

<b>User Status Activity</b>	Combines the User Status report with a more granular view of what specific pages the users were viewing in their given states.
<b>Number of Registrations</b>	Counts Registration Confirmation page views (a good indication of how many WorldCat accounts were created).
<b>Detailed View Landing Method</b>	Counts pages from which users have linked their detailed records.
<b>Refined Search Value</b>	Counts specific elements selected out of the Refine Your Search facets in the left column, Advanced Search refinement selections, and sorting options chosen.
<b>Selected Book</b>	Counts views of specific detailed records.
<b>Saved List</b>	Currently not in use.
<b>Form Type</b>	Counts page views of various forms throughout the service.
<b>Form City</b>	City entered in WorldCat account signup.
<b>Form State</b>	State/Province selected in WorldCat account signup.
<b>New/Repeat Customer</b>	Counts page views generated by new vs. repeat users for the given timeframe.
<b>Sub-Page Name</b>	Counts tabs selected on the detailed record. Also counts which citation format was selected when a user creates a bibliography from a list.
<b>Visit Number</b>	Shows page views generated by visit count. For example, shows all the page views generated by users who were visiting the site for the fifth time.
<b>Scope Selected</b>	Shows whether, on a given search, a user did or did not change their scope (e.g., switch from all of WorldCat to the local institution). If both scopes are the same, the scope did not change for that search.

## Search Count Report

The total of the **Page Views** column is the total Search Count for that time period. This count includes clicks on facets, Next and Previous pages, clicks on author names and subjects from detailed records, etc. Any link or search box selected conducts a search.


Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 1-10</b> .	
3	Click <b>Search Type</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	Choose the appropriate date or date range (if it is not already appropriately set).	
5	Click on any <b>Search Type</b> to see more details.	

## Search Count Report (Advanced)

Follow the steps in the previous table. Advanced results are shown in the **Search Type** advanced.

## Advanced Searches by Fields Used Report

You may conduct searches on this report to get advanced searches which match a certain indicator (e.g., search su: to get all advanced searches which include the Subject index).

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 1-10</b> .	
3	Click <b>Search Type</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	Click the green diagram symbol  to the left of <u>advanced</u> .	The correlation menu opens.

5	Select <b>Custom Insight 1-10</b> .	
6	Click <b>Internal Search Terms</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.

**Note:** Terms preceded by certain index indicators determine which field was used:

- ti: = title
- au: = author
- su: = subject
- isbn:, issn:, oclc: = matching standard number
- No indicator = keyword

## Advanced Searches by Limiter Selected Report

This report shows only those search limiters which were originated in Advanced Search.

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 11-20</b> .	
3	Click <b>Refined Search Value</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	On this report, search for <u>advanced</u> .	

Index indicators as follows:

- dt: = document type from Format limiter
- fm: = format from Format limiter
- -fm: = Content limiter or Audience limiter
- yr: = publication date / date range
- ln: = language

## Count of Records Retrieved per Search Report

This report lists the number of searches that returned results within the listed range (0 records, 1 record, 2-9 records, 10-99 records, etc.).

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 1-10</b> .	
3	Click <b>Number of Search Results</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	Choose the appropriate date or date range (if it is not already set).	

## Search Count (No-Hit) Report


This report counts searches which resulted in no records being returned.

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 1-10</b> .	
3	Click <b>Number of Search Results</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	Choose the appropriate date or date range (if it is not already set).	
5	Click on <u>0</u> under <b>Number of Search Results</b> to see the no-hit search count.	

## Search Terms which resulted in No Hits Report

This report lists search terms which had no results, ranked by how often the term was searched.

To create the report, follow the steps in the previous table, then:

Step	Action	Result
1	On the Search Count (No-Hit) Report, click the green diagram symbol  to the left of the <u>0</u> .	The correlation menu opens.
2	Select <b>Custom Insight 1-10</b> .	
3	Click <b>Internal Search Terms</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.

## Facet Click Count Report

This report shows the number of times an element was clicked within one of the facet categories. Facets allow a user to limit search results to a certain type of format or other search limits such as audience or language. Subformat can be combined with Format as they are both under the same Facet (subformats are the bulleted items which show up under the Format facet in WorldCat Local).

**Note:** ContentType is the Content facet in WorldCat Local, while Content is the Topic facet.

To create the report:

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 1-10</b> .	
3	Click <b>Refined Search Criteria</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.

## Page View Count Report

This report counts all pages viewed across the Worldcat Local instances, aggregated, including all social pages, etc.

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Site Traffic</b> .	
3	Click <b>Page Views</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.

## Page View Count Report (Detailed Record)

This report lists the page views for every page on the site.

To create the report, follow the steps in the previous table, then:

Step	Action	Result
1	On the Page View Count Report, click <b>Entire Site</b> at the top right of the screen (next to <b>Selected Page</b> ).	
2	Select <b>Detailed Record</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.

## Click to Tabs on Detailed Record Report

Details is the default facet displayed so it will always have the most clicks by a large margin. Libraries, Editions, Subjects, and Reviews are the other tabs. Other items which may display in this report are not tabs from the detailed record.

Step	Action	Result
1	Select <b>Traffic</b> in the left column.	Options under <b>Traffic</b> expand.
2	Select <b>Custom Insight 11-20</b> .	
3	Click the sub page name.	

## Fulfillment Option Click Counts Report

This report displays clicks to various items in the detailed record, including all fulfillment services (e.g., OpenURL resolvers, Place Hold, Request Item through ILL) and other services (e.g., Google Books, Cite This Item, Export to EndNote, CONTENTdm).

Step	Action	Result
1	Select <b>Conversion</b> in the left column.	Options under <b>Conversion</b> expand.
2	Select <b>Services</b> .	
3	Click <b>Service Clicks</b> .	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	Click <b>Revenue</b> at the top right of the screen (next to <b>Showing</b> ).	A pop-up window appears.
5	Drag <b>Revenue</b> from the right column to the Remove Item trash can at the bottom left.	<b>Revenue</b> is removed from the Report Data Column.
6	Drag <b># of Services Clicks</b> to the right column.	<b># of Services Clicks</b> is added to the Report Data Column.
7	Click the <b>Run Comparison Report</b> button.	The Service Clicks Report appears.

**Note:** See the Fulfillment Options Click Counts Glossary on page 8 for more information.

## Facet Click Details Report

This report lists clicks to individual elements which appeared within a facet in WorldCat Local.

Step	Action	Result
1	Select <b>Conversion</b> in the left column.	Options under <b>Conversion</b> expand.
2	Select <b>Custom Evars 1-10</b> .	
3	Click any of the <b>Refine by</b> options*.	The system responds with a confirmation message <b>Your report is loading...</b> before the report appears.
4	Once the report appears, click the link next to <b>Showing</b> at the top right of the screen.	A pop-up window appears.
5	Drag any items from the right column to the Remove Item trash can at the bottom left.	Data is removed from the Report Data Column.
6	Drag <b>Instances</b> to the right column.	<b>Instances</b> is added to the Report Data Column.
7	Click the <b>Run Comparison Report</b> button.	The Refine by Report appears.

**\*Refine by options that correspond to facets in WorldCat Local:**


Omniture option	WorldCat Local Facet
Refine by Author	Author
Refine by Content	Topic
Refine by Format	Format
Refine by Language	Language
Refine by Year	Year
Refine by Audience	Audience

## Creating Bookmarks to Reports/E-mailing Reports

Once you generate reports, you can save them as a bookmark for access later.

**Note:** When creating a report, it is best to use the Range value of "Last Month" or "Last 3 Months," etc. Then if you bookmark a report, it will always remain for that time period.

**To create a bookmark to a report:**

Step	Action	Result
1	Click the <b>Bookmark Report</b> button  in the menu bar under the report name.	A pop-up window appears.
2	Type a name for the bookmark in the <b>Name</b> field.	
3	Type a description in the <b>Description</b> field (optional).	
4	Choose a location for the bookmark from the drop-down menu under <b>Location</b> , or type a folder name.	
5	If you would like the report to display when you log in to Omniture®, click the check box.	
6	Click <b>Not Scheduled</b> next to <b>Delivery Scheduled</b> to set delivery options (optional).	A pop-up window appears.
7	Choose the <b>File Format, File Options, and File Destination</b> to download or e-mail reports.	
8	Click <b>OK</b> to send the report now. OR	
9	Click <b>Schedule Delivery</b> to set a regular delivery schedule for the report.	A pop-up window appears.
10	<b>Select One Time or Recurring options.</b>	

11	Click <b>OK</b> . <b>Note:</b> You may also cancel scheduled delivery from this window.	The window closes and the Add/Edit Bookmark window appears.
12	Click <b>OK</b> to close the window.	A link called <b>My Bookmarks</b> is now listed under <b>Bookmarks &amp; Alerts</b> in the left column.

**To e-mail a report:**

Step	Action	Result
1	When a file is loading, click the <u>Email this report</u> link.	A pop-up window appears.
2	Choose the File Format, and confirm the email address.	
3	Click <b>Send</b> .	

**Support**

**OCLC support staff:**

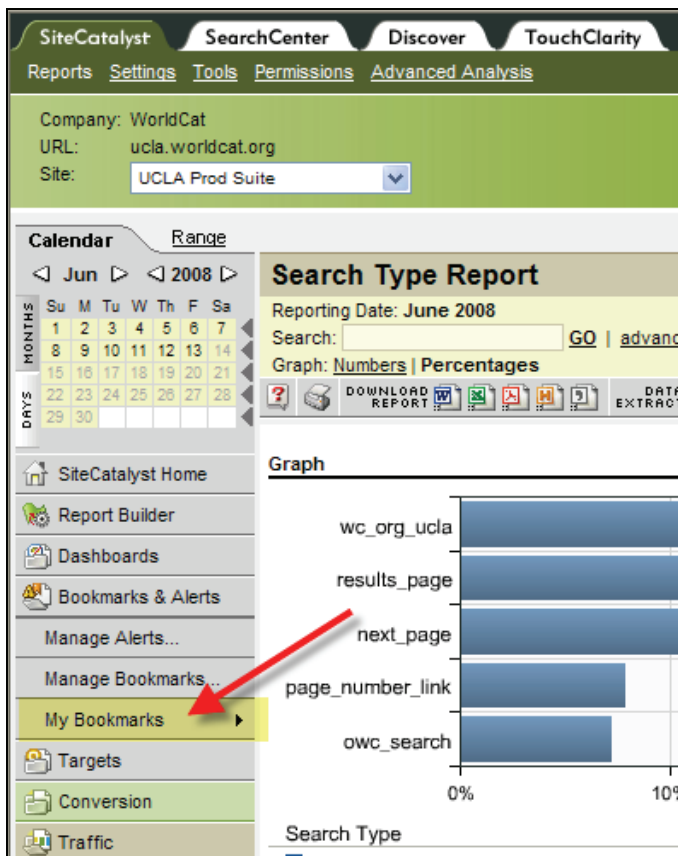
E-mail: [support@oclc.org](mailto:support@oclc.org)

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

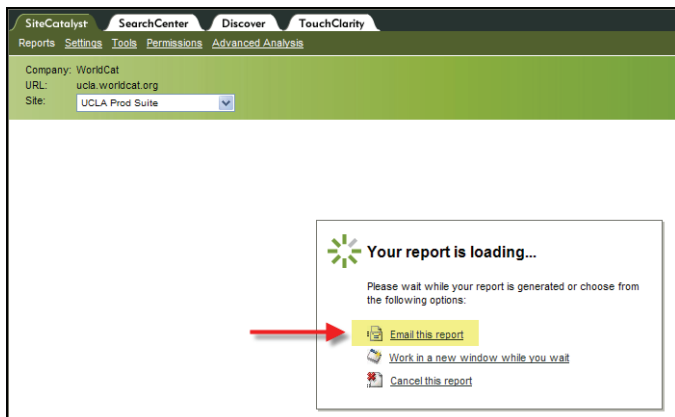
(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

**Ordering copies of this publication**

	Action
1	To order additional copies of this publication, send an e-mail request to <a href="mailto:orders@oclc.org">orders@oclc.org</a> . Include the product code (REF1129).
2	You may also use the OCLC Index of Documentation at <a href="https://www3.oclc.org/documentation/">https://www3.oclc.org/documentation/</a> . If the <u>Order hard copy</u> link is available, you may use it to request a printed copy.



You may also set up e-mail options when a report is loading.



## Fulfillment Option Click Counts Glossary

Name	Definition
[library symbol]_Asklib	Virtual Reference link
[library symbol]_FSFT	FirstSearch Full Text link
[library symbol]_Libinfo	Library Information Link
[library symbol]_NLFT	NetLibrary button/link
[library symbol]_OPACFTLink	Full text links from local 856 field data (e.g., "Internet resources found" section on <a href="http://uwashington.worldcat.org/oclc/34337969">http://uwashington.worldcat.org/oclc/34337969</a> )
[library symbol]_OUFTResolver	Check for Electronic Resources (OpenURL resolver) button/link
[library symbol]_PlaceHold	Request Item button/link
[library symbol]_ResourceSharing	Request Item through Interlibrary Loan
ExportDR_EndNote	Export to EndNote link on Detailed Record
ExportDR_RefWork	Export to RefWorks link on Detailed Record
ExportList_endNote	Export List to EndNote
ExportList_html	Export list in HTML
ExportList_refWorks	Export list to RefWorks
ExportList_RIS	Export list in RIS
ExportList_RTF	Export list in Rich Text Format
GoogleView_Btn_D	Preview Item (Google Books) button
GoogleView_Text_D	Preview Item (Google Books) text link under Get It
Nolib_AdditionalInfo	Additional Info link (856, w/ link text, from WorldCat record)
Nolib_CNTNT_B	CONTENTdm: Thumbnail/View Online text on Search Results page
Nolib_CNTNT_D	CONTENTdm: thumbnail image on detailed record, View Item Online link on detailed record
Nolib_CNTNT_E	CONTENTdm: thumbnail image link on Editions tab
Nolib_CNTNT_FF	CONTENTdm: View Item Online button in Get This Item (fulfillment) area on detailed record
Nolib_DGCNT_D	View Item Online link on detailed record for non-OCLC-hosted digital items
Nolib_DGCNT_FF	View Item Online button in Get This Item (fulfillment) area on detailed record for non-OCLC-hosted digital items
Nolib_DigitalArchive	CONTENTdm: thumbnail image on detailed record
Nolib_WebResource	Web Resources link (856, no link text, from WorldCat record)