Clarivate™

Cognos Reports Guide

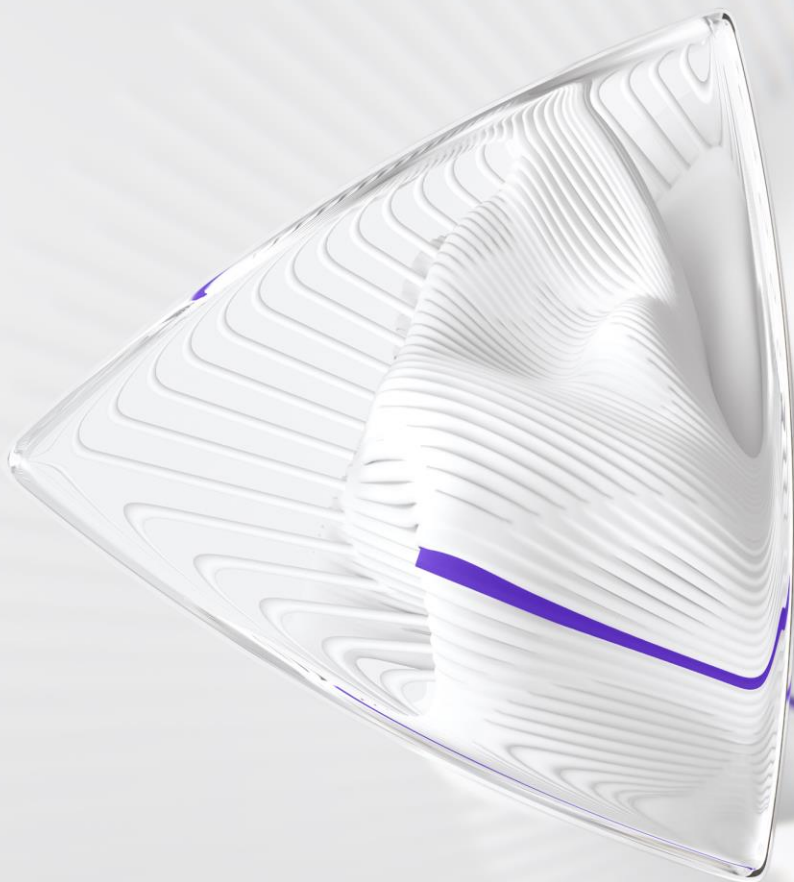ScholarOne Manuscripts™

TABLE OF CONTENTS

Introduction

Admin Support - Help & Faqs

Using *ScholarOne Manuscripts* for your journal, one of your greatest help tools is our role-base support pages. The Admin Support page contains downloadable guides (such as this one), video tutorials and FAQs.

The ability to create a case to get assistance from our customer support group, can be found on the Contact Support page. We recommend that you bookmark our help pages and consult it often.

System Requirements

Cognos supports the following web browsers.

- Firexfox

- Chrome

- Safari

- Edge

Accessing Reports

The Reports area of the dashboard is located beneath **Admin Tools.**

Reports are broken out into several options: There are reporting categories, such as **Manuscript Status and Summary Reports,** which each contain links to Standard Reports and Build Your Own reports options. Additionally, there is a link to other functions such as Publication folders, My Folders, Custom Reports, and role Reports.

Clicking on the plus sign (+) next to any reporting category will expand the menu to display all of the Standard and Build Your Own reporting options for that category.

Note: The specific Standard Reports and Build Your Own Reports packages are configurable and may vary based on the role and site you are logged in to.

Accessing Standard Reports

When a reporting category is expanded, you will see a listing of Standard Reports available for that category. Clicking on the **question mark** icon to the left of any Standard Report name will give you a brief description of the report and a link to **view a sample** report.

Clicking the **Name** of any Standard Report will take you directly to the **Select Search Criteria** page of the report in the Cognos reporting system.

Accessing Build Your Own Reports

Each reporting package has a unique set of fields and filters available that are tailored to the specific type of report being built. Clicking on the **question mark** icon to the left of any Build Your Own Reports package name will give you a brief description of what you will be able to create.
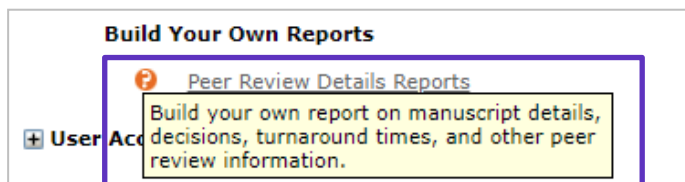
The reporting packages available are:

> **Manuscript Status & Summary Reports:** Use this package to build your own report on manuscripts, their status, submission statistics, and other details. This is the most basic of manuscript packages available and is suitable for novice users or for those building simple manuscript-centric reports. It provides rolled-up data that applies to all versions of a manuscript.

> **Production Reports:** Use this package to build your own report on manuscripts, volumes and issues, export information, and other production details.

> **File Storage Reports:** Use this package to build your own report on file storage.

> **Peer Review Details Reports:** Use this package to build your own report on manuscript details, decisions, turnaround times, and other peer review information. The Peer

4

Review Details package is the most complex of all reporting packages and has the most comprehensive list of fields and filters.

User Account Reports: Use this package to build your own report on users and their contact information, roles, keywords, and other account details.

Reviewer Performance Reports: Use this package to build your own report on reviewers and their performance.

Editor, EIC & Admin Performance Reports: Use this package to build your own report on editors, EICs and Admins and their performance.

Invited Author Performance Reports: Use this package to build your own report on invited authors and their performance.

Publication Folders, My Folders, Custom Reports, And Role Reports

Clicking the Publication Folders, My Folders, Custom Reports, and Role Reports link will open a new window containing the Cognos interface on the Publication Folders page. From this page, you can navigate to:

- Reports you have built and saved for yourself on the **My Folders** tab.

- Custom reports that may have been built for your site.

- Reports that have been created for specific roles on your site.

> Publication Folders, My Folders, Custom Reports, and Role Reports

The Cognos Interface

The **Public Folders** tab gives you access to the **Publication Folders** and role-based folders. The **My Folders** tab gives you access to reports you have created and/or saved.

Note: You can copy reports from your **My Folders** tab into a specific role based folder.
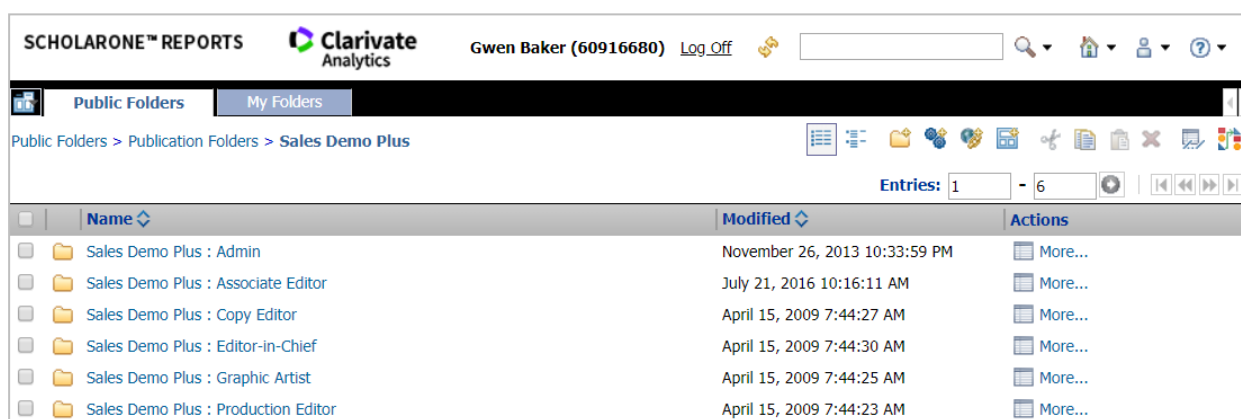
Additional folders can be found in the **Public Folders** section.
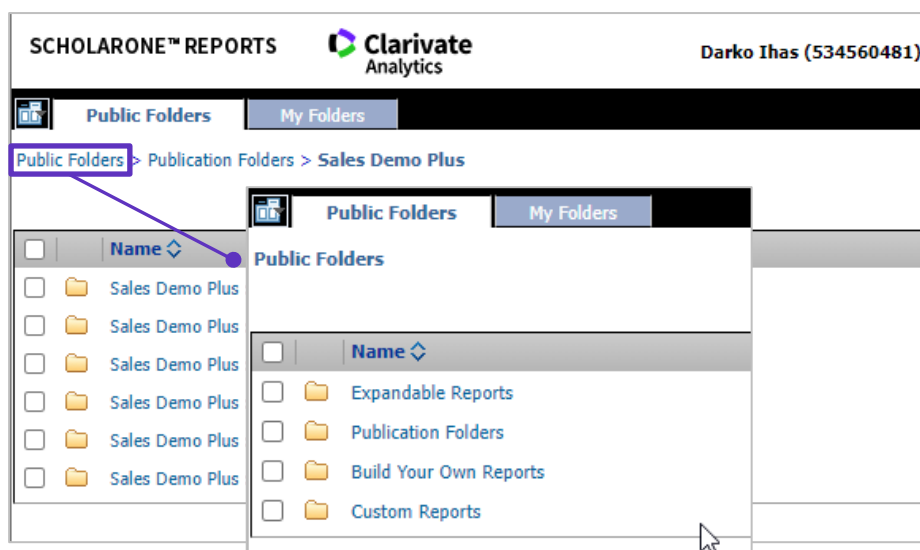
Expandable Reports – This is the older version of the Cognos reports and while it is visible, it is suggested you not use this folder.

Build Your Own Reports- This is the older version of the Cognos reports and while it is visible, it is suggested you not use this folder.

Custom Reports- In this folder you will find a special report called **Custom Questions and Responses.** Clicking on this report will take you to a window where you can create a custom report based upon custom questions you have had created for your site.
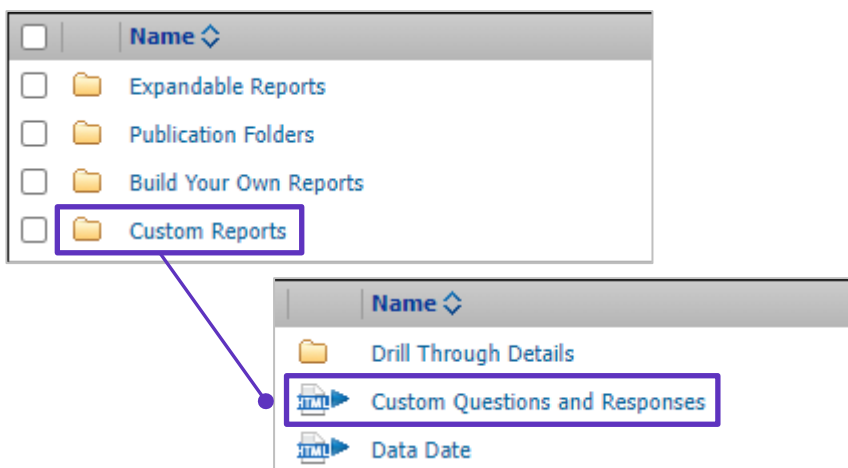
You will be able to select the **Custom Question Type**, and the individual questions you want in the report.

The report results will give you all questions you selected in easy to read columns.

Manuscript ID	Date Submitted	Decision Date	Manuscript Type	Title	Decision	Performer	Are any of the included images potential journal covers?	Are you willing to pay the journal	Confirm - research meets ethical guidelines	Confirm - submitted solely to this journal	Have your co-authors had an opportunity to review the manuscript, and do they approve the version of	Name of Special Issue	Number of Words	Plain Language Summary
WRK4-2010-12-0066	Dec 14, 2010 1:49:03 PM	Dec 14, 2010 2:20:24 PM	Original Article	INFORMATION-COMMUNICATION TECHNOLOGIES OPEN UP INNOVATION	Major Revision	Bissonette, Lisande		N/A	Yes	Yes			5,930	
WRK4-2010-12-0067	Dec 15, 2010 10:43:35 AM	Dec 15, 2010 11:11:31 AM	Original Article	Preparation of Complaint Matrices for Quantifying Cellular Contraction	Major Revision	Bissonette, Lisande	No	N/A	Yes	Yes	Yes		5,950	
WRK4-2010-12-0068	Dec 15, 2010 2:08:43 PM	Dec 15, 2010 2:34:26 PM	Original Article	Better Management of Cardiovascular Diseases by Pulse Wave Velocity: Joining Clinical Practice with Clinical Research using Evidence Based Medicine	Major Revision	Bissonette, Lisande	No	N/A	Yes	Yes	Yes		5,950	

When you are logged into the **Home** page of the Cognos reporting system, you will see icons on the **right** side of the header that can be used to navigate to specific functions in Cognos.

Home
Set View as Home

Darko Ihas (534560481)   Log Off
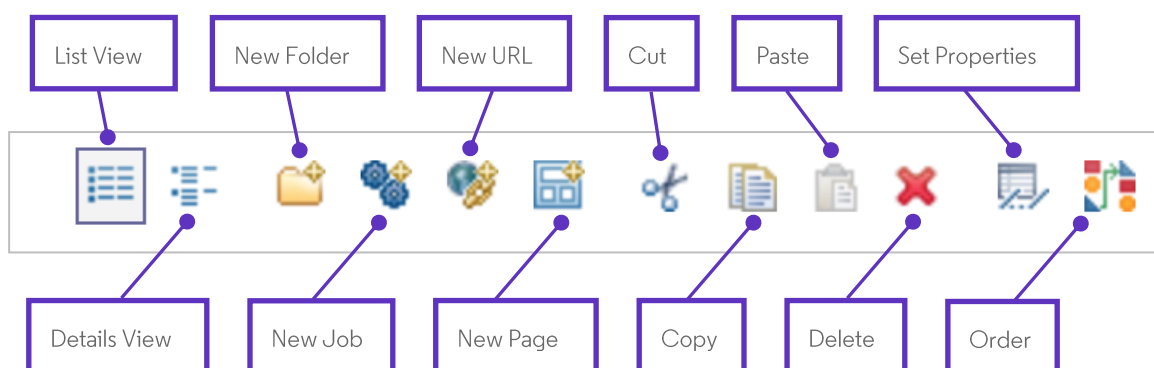
Always **Log Off** when you are done running a report

✓ Full text and all fields
Name field
Description field
Name or description field

My Watch Items
My Preferences

Help
IBM Cognos on the Web
Go to the Welcome Page
About IBM Cognos Connection

Below the header, also on the **right**, are icons that can be used to perform various changes.

List View

New Folder

New URL

Cut

Paste

Set Properties

Details View

New Job

New Page

Copy

Delete

Order

Standard Reports

Running Standard Reports in Cognos

To run a standard report, select a standard report from the direct links on your dashboard. Upon clicking the link, you will be taken to the **Select Search Criteria** page. Make your selections for what data you would like to include and click **Finish**.

By default, the report results will be shown in html format. To change the format so you can export the report to your computer, use the drop-down selection in the **upper right-hand side** of the screen.

Note: The **Excel 2007 Data** option will only give you raw data not the chart(s). Use **Excel 2007 Format** if you need to include the chart(s).

When viewing the results in html format, you will see the options to **Page Down** and move to the **Bottom** of the screen in the **lower left-hand corner** of the screen.

11
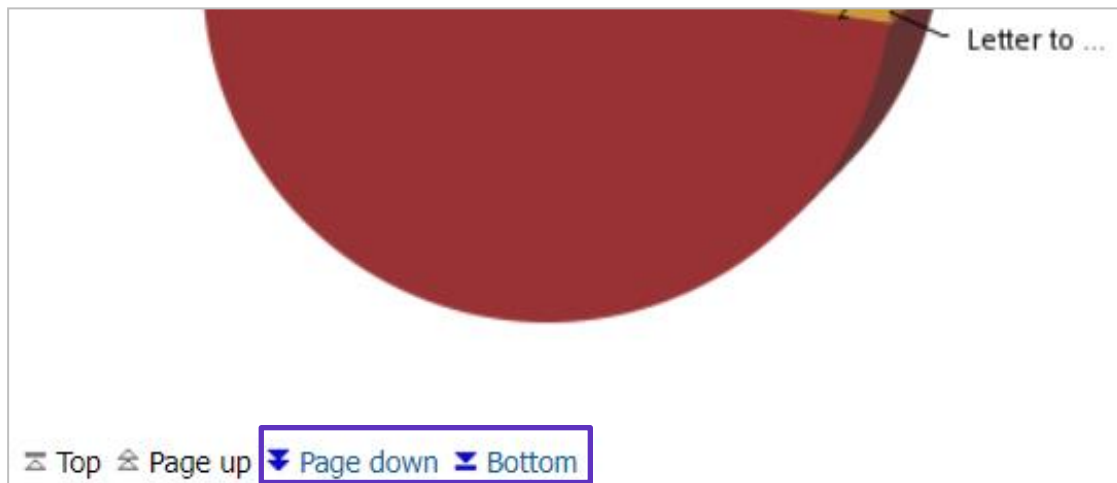
Selecting a Delivery Method

When selecting a Standard Report to run, you may see a message reading "Your report is running. Instead of waiting, you can select a delivery method to run the report in the background". Clicking the **Select a delivery method** link allows you to **Save as Report View** (a copy of the report at the time you ran it) or **E-mail** the report.

Your report is running.

Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.

Cancel

Your report is running.

Instead of waiting, you can set it to run in the background with one of the following delivery options:

Save as Report View...

Email Report...

Cancel
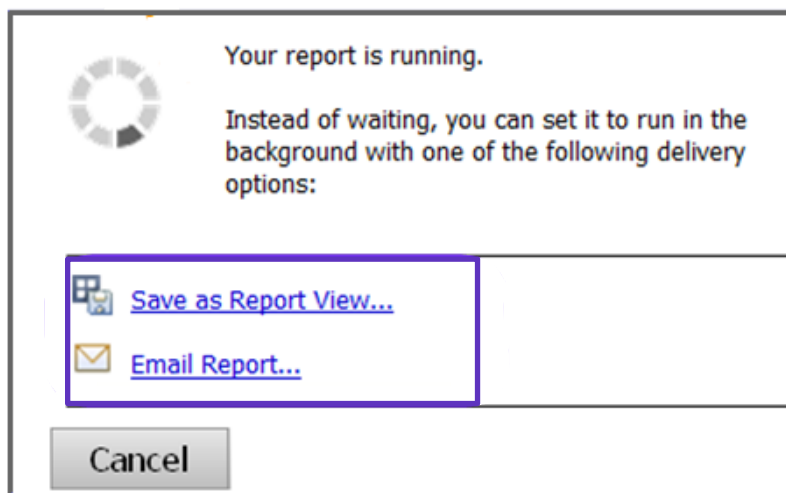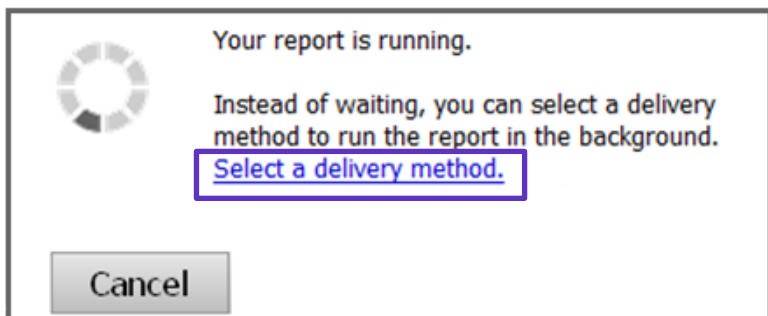
Note: If you choose to save the **Save as Report View,** we suggest that you name the report descriptively and save it to your **My Folders**.

When you choose the option to **E-mail Report,** you will be taken to a new window to create the e-mail.

Set the email options Help ⊗

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:

Cc:

Select the recipients...   Show Bcc

Subject:

Report: Time from Submission to Decision

Body: Change to plain text »

☑ Attach the report

OK   Cancel

Top Five Standard Reports

The following examples are standard reports most commonly ran by journal offices.

Manuscripts In Process

This report will give you the current status of all manuscripts that have not yet received a decision. There is no selection criteria needed, just click the **Finish** button to see your results.

Report Name:	Manuscripts in Process
Description:	The Manuscripts in Process report shows the status of all manuscripts that have not been decided. Detailed information is provided about each manuscript.

Cancel   < Back   Next >   **Finish**

This is a great report to give to your **Editor-in-Chief** at the beginning of each week, so they have an overview of what is being worked on and what is overdue.

Manuscripts in Process for ScholarOne University Training Workflow 1

Estimated Data Date: May 13, 2014 12:22:02 PM

Manuscript ID	Manuscript Type	Manuscript Title	Contact Author Name	Manuscript Status	Submission Date	# Days Since Submission	Editor Role Name	Assigned Editor	Date First Reviewer Agreed	Number of Reviews Received
MCU1-2013-05-0004.R1	Original Article	Dogwood Flowering Patterns in Virginia	Author, Alan	Awaiting Reviewer Scores;Select Reviewers	08/27/2013	259	Associate Editor	Editor, Eddie	08/27/2013	0
MCU1-2013-05-0007	Letter to the Editor	Letter to the Editor	Author, Alan	Awaiting Reviewer Scores	05/23/2013	355	Associate Editor	Editor, Eddie	07/19/2013	0
MCU1-2013-07-0010	Original Article	Migration Patterns of the Cardinal	Author, Alan	Awaiting Reviewer Scores	07/29/2013	288	Associate Editor	Editor, Emily	08/29/2013	0
MCU1-2013-07-0012	Original Article	Fruit Flies	Author, Alan	Make a Decision	07/31/2013	286	Associate Editor	Editor, Emily	09/03/2013	0
MCU1-2013-08-0015	Original Article	Meredith's Test Manuscript	Abel, Meredith	Select Reviewers	08/12/2013	274				0

Manuscripts Accepted by Country

This report will give you an Accept/Reject ratio by country for a specific date range.

You can select the name of any country in your results for information about a specific country.

Manuscript Milestone

The Manuscript Milestone report shows when each manuscript has hit a particular milestone and the duration in days of various stages of the submission and review process. To run this report, choose one of the date range options, Date of Original Submission or Decision Date.

Note: Only make changes to one of the date ranges

The first section of the report results will give you statistics by Manuscript Type, and you can select a specific type to view full details. Page down for more information.

Information based on manuscripts with an original submission date of Between May 1, 2017 and May 26, 2018 and a final decision date of On or before May 26, 2018.

Days to First Decision (All Manuscripts): 5.67
Days to First Decision (Mss. with Final Decisions Only): 5.67

Statistics by Manuscript Type (Final Decisions Only):

Manuscript Type	Count	Accept	Acc. Ratio	Reject	Rej. Ratio	Average	Median	Minimum	Maximum
Original Article	3	2	66.67	1	33.33	5.67	1.00	0.00	16.00
Total/Average	**3**	**2**	**66.67**	**1**	**33.33**	**5.67**	**1.00**	**0.00**	**16.00**

Days to Final Decision

May 26, 2022

1

⊼ Top ⌃ Page up ⬇ Page down ⊻ Bottom

The next page will give you statics by Associate Editor. This section is valuable if you are using Associate Editors on your site.

You can select the name of a specific Associate Editor for more detailed information about that individual. Choose Page down again for more information.

Statistics by Editor: (Final Decisions Only)

Editor Full Name	Editor Role Name	Count	Accept	Acc. Ratio	Reject	Rej. Ratio	Average	Median	Minimum	Maximum
Editor, Emily	Associate Editor	2	2	100.00	0	0.00	0.50	0.50	0.00	1.00
		1	0	0.00	1	100.00	16.00	16.00	16.00	16.00
Totals		**3**	**2**	**66.67**	**1**	**33.33**	**5.67**	**1.00**	**0.00**	**16.00**

May 26, 2022

2

⊼ Top ⌃ Page up ⬇ Page down ⊻ Bottom

This last section will give you a break- down of each manuscript, including information on each revision. This section is frequently asked for by many Editors–in-Chief.

Information based on manuscripts whose original submission date is Between Jan 1, 2017 and Apr 19, 2018

VER	Manuscript ID	RESUB	Manuscript Type	Submit Date (Original)	Date to Editor (Earliest)	Days to Edit	Date First Reviewer Assigned (Earliest)	Date Last Review Completed (Last)	Days in Review	Editor Recommendation Date	Days to Recommend (First)	Decision Date (First)	Days to Decide (First)	Decision Name (First)	Final Decision Date	Days to Final Dec	Final Dec	EDITOR	Editor Role Name
0	WRK4-17-Feb-0001		Original Article	Feb 8, 2017	Apr 4, 2017	55.0	Apr 4, 2017	Apr 4, 2017	0.0			Apr 4, 2017	55.0	Accept	Apr 4, 2017	55.0	Accepted		
WRK4-17-Feb-0001			**Original Article**	**Feb 8, 2017**	**Apr 4, 2017**	**55.0**	**Apr 4, 2017**	**Apr 4, 2017**	**N/A**			**Apr 4, 2017**	**55.0**	**Accept**	**Apr 4, 2017**	**55.0**	**Accepted**		
0	WRK4-17-Jul-0008		Original Article	Jul 3, 2017	Jul 3, 2017	0.0											--		
WRK4-17-Jul-0008			**Original Article**	**Jul 3, 2017**	**Jul 3, 2017**	**0.0**			**N/A**								**--**		
0	WRK4-17-Jul-0009		Original Article	Jul 19, 2017	Jul 19, 2017	0.0	Jul 20, 2017	Jul 20, 2017	0.0	Jul 20, 2017	1.0	Jul 20, 2017	1.0	Accept	Jul 20, 2017	1.0	Accepted	Editor, Emily	Associate Editor
WRK4-17-Jul-0009			**Original Article**	**Jul 19, 2017**	**Jul 19, 2017**	**0.0**	**Jul 20, 2017**	**Jul 20, 2017**	**N/A**	**Jul 20, 2017**	**1.0**	**Jul 20, 2017**	**1.0**	**Accept**	**Jul 20, 2017**	**1.0**	**Accepted**	**Editor, Emily**	**Associate Editor**
0	WRK4-17-Jul-0010		Original Article	Jul 24, 2017	Jul 24, 2017	0.0	Jul 24, 2017	Jul 24, 2017	0.0	Jul 24, 2017	0.0	Jul 24, 2017	0.0	Accept	Jul 24, 2017	0.0	Accepted	Editor, Emily	Associate Editor
WRK4-17-Jul-0010			**Original Article**	**Jul 24, 2017**	**Jul 24, 2017**	**0.0**	**Jul 24, 2017**	**Jul 24, 2017**	**N/A**	**Jul 24, 2017**	**0.0**	**Jul 24, 2017**	**0.0**	**Accept**	**Jul 24, 2017**	**0.0**	**Accepted**	**Editor, Emily**	**Associate Editor**

Time From Submission to Decision

Can be grouped by: Manuscript Type, Country of Submission, Assigned Editor, Manuscript Decision, or Month of Submission. Running the report by Manuscript Type or Country of Submission are the most popular ways to run this report.

The report results will give you multiple pages of information and charts based on your selection criteria.

The example below is grouped by Country of Submission.

Time from Submission to Decision for Sales Demo Plus

Estimated Data Date: May 26, 2022 5:44:03 AM

Information based on all original manuscripts.
Grouped by Country/Region Of Submission.

Number of Manuscripts by Country/Region

Country/Region
- China
- France
- Hungary
- Korea (the Republic of)
- Singapore
- Slovakia
- United Kingdom of Great Britain and North...
- United States

Country/Region of Submitting Author	Number of Manuscripts	Percentage of Total
China	2	0.9%
France	31	13.7%
Hungary	2	0.9%
Korea (the Republic of)	10	4.4%
Singapore	3	1.3%
Slovakia	1	0.4%
United Kingdom of Great Britain and Northern Ireland	20	8.8%
United States	115	50.7%
	43	18.9%
Total:	227	0.4%

Number of Manuscripts

May 26. 2022 — 1 — 7:32:37 AM

Selecting page down to the second screen you will see a world map of Manuscripts by Country.

Manuscripts by Country

Data Item1
- 39
- 31
- 24
- 16
- 9
- 1
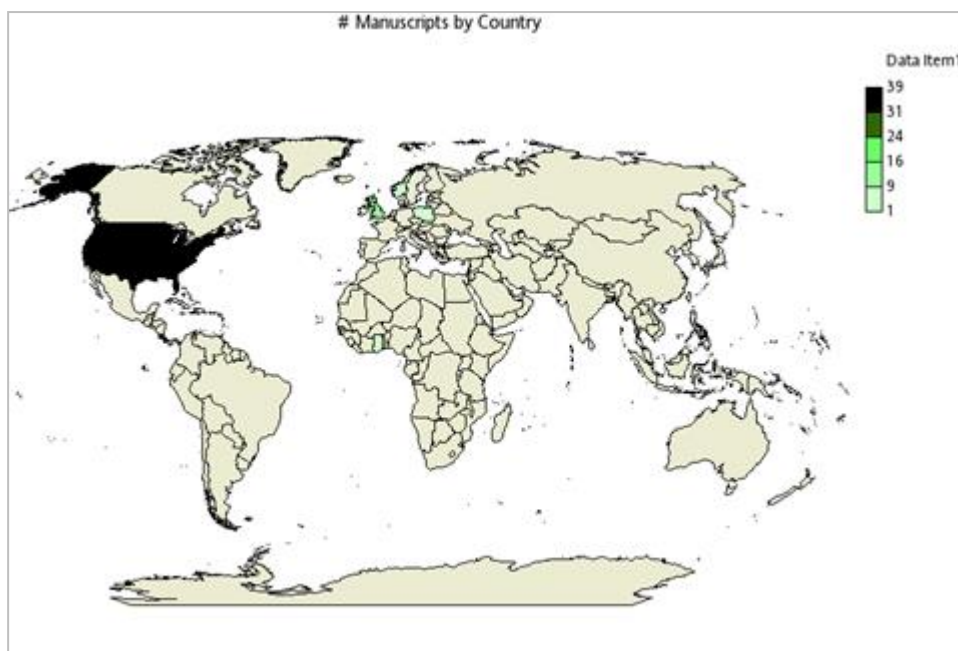
The next screen will give you Average days by Country

20
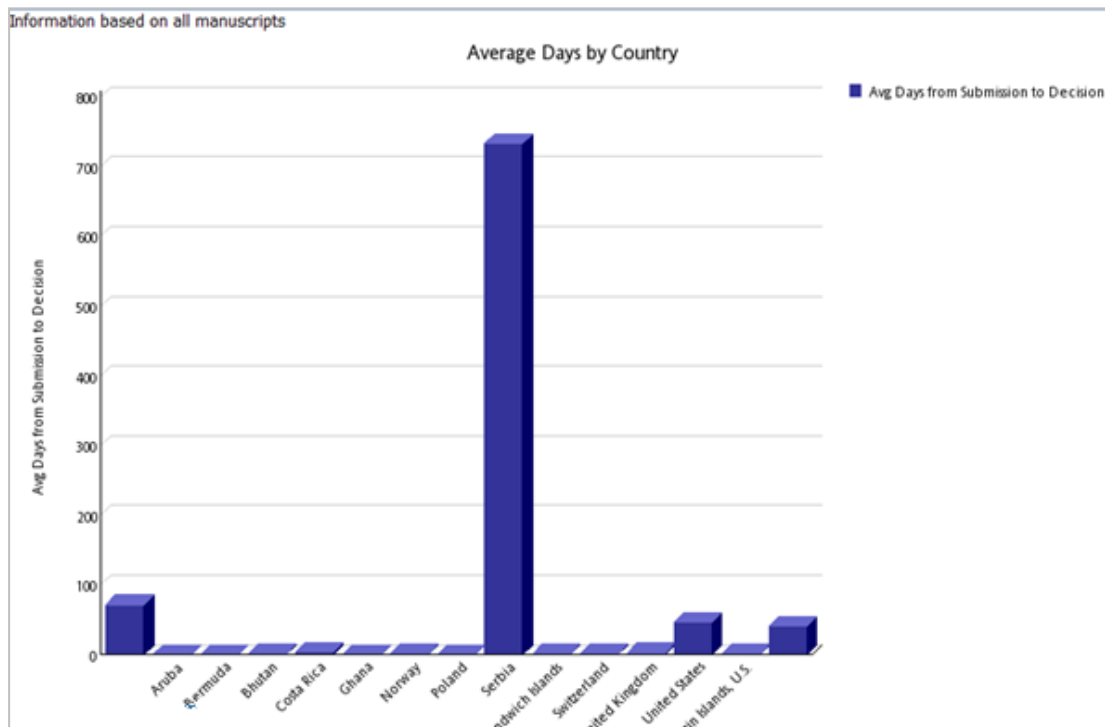
Page down again for Number of Days from Submission to Decision.
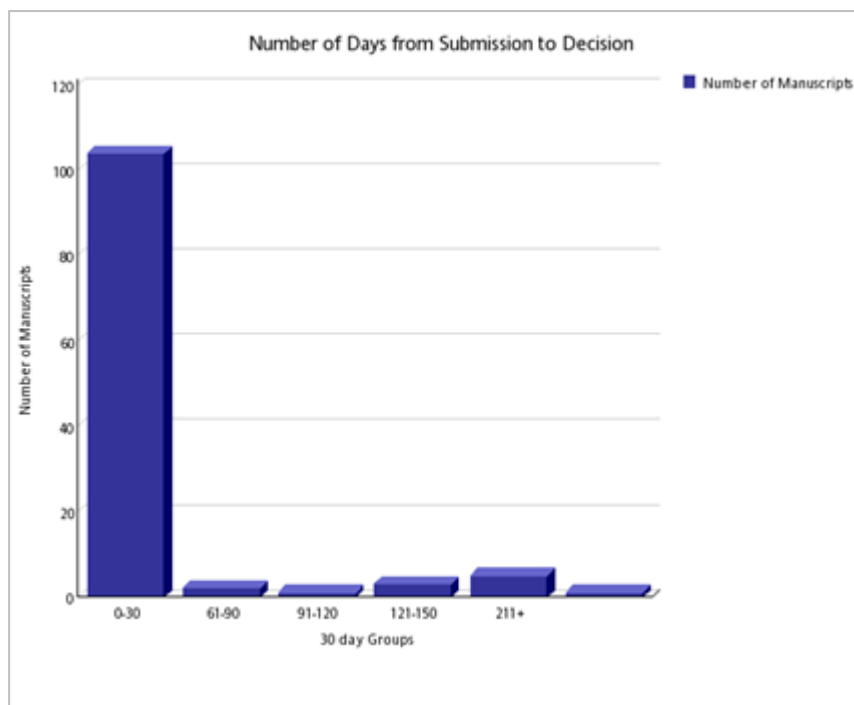
The last section is broken out by each country with information on each individual manuscript. You can click on a specific manuscript to see even more information.

France

Number of Manuscripts: **31**

Manuscript ID	Manuscript Type	Author	Submission Date	Decision Date	No Days	Decision	Country/Region of Submitting Author	Institution of Submitting Au
WRK4-2009-06-0002	Original Article	Beaufort, Amelie	Jun 17, 2009	Jun 17, 2009	0	Accept	France	University of Nancy 1 - HENRI POINCARE
WRK4-2009-07-0008	Original Article	Beaufort, Amelie	Jul 08, 2009	Jul 08, 2009	0	Minor Revision	France	University of Nancy 1 - HENRI POINCARE
WRK4-2009-07-0012	Original Article	Beaufort, Amelie	Jul 30, 2009	Jul 30, 2009	0	Accept	France	University of Nancy 1 - HENRI POINCARE
WRK4-2009-08-0014	Original Article	Beaufort, Amelie	Aug 05, 2009	Aug 05, 2009	0	Minor Revision	France	University of Nancy 1 - HENRI POINCARE
WRK4-2009-08-	Original Article	Beaufort,	Aug 06, 2009	Aug 06,	0	Minor Revision	France	University of Nancy 1 - HENRI

Task details for MCU1-2009-07-0082

Manuscript ID: MCU1-2009-07-0082
Manuscript Type: Original Article
Title: Cure for Cancer is Around the Corner
Date Submitted: Jul 13, 2009
Editor name: Editor, Eddie

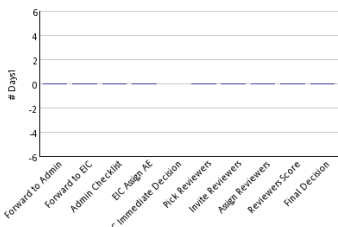| Task Name	Task Status	Task Date Started	Task Date Completed	# Days
Forward to Admin	Completed	07/13/2009	07/13/2009	0
Forward to EIC	Completed	07/13/2009	07/13/2009	0
Admin Checklist	Completed	07/13/2009	07/13/2009	0
EIC Assign AE	Completed	07/13/2009	07/13/2009	0
EIC Immediate Decision	Abandoned	07/13/2009		
Pick Reviewers	Completed	07/13/2009	07/13/2009	0
Final Decision	Abandoned	07/13/2009		
Invite Reviewers	Completed	07/13/2009	07/13/2009	0
Assign Reviewers	Completed	07/13/2009	07/13/2009	0
Reviewers Score	Completed	07/13/2009	07/13/2009	0
Final Decision	Completed	07/13/2009	07/13/2009	0

Number of Days Per Task

For MCU1-2009-07-0082

Reviewer Summary

The Reviewer Summary Report is a great report to use when trying to figure out who your top reviewers have been for the year.

Tip: Only select one date range for running the report.

The results for each reviewer will also include the ability to click the name of the reviewer for information about which papers they reviewed.

Selected Report Parameters:

Which Manuscripts: all
Submitted Date Range: all
Selection Date Range: Between Jan 1, 2017 and May 26, 2018
Invitation Date Range: all
Assignment Date Range: all
Score Completion Date Range: all

Name	E-mail Address	Selected	Invited	Unassigned	Uninvited	No Reply	Declined	Agreed	Completed	Average R-Score	Avg. Time
Dahl, Josh	joshjdahl@gmail.com	1	0	0	0	0	0	0	0		
Keebler, Gregarious	greg.kloiber@clarivate.com2	1	1	0	0	0	0	1	1		0.00
Pikovsky, Amelia	Amelia.Pikovsky@Clarivate.com	2	2	0	0	0	0	2	0		
Reviewer, Mere	merereviewer@163.com	1	0	0	0	0	0	0	0		
Reviewer, Michelle	michelle.reviewer@test.com	2	1	0	0	0	0	1	1		0.00
Reviewer, Paul											
Reviewer, Rebecca											
Reviewer, Rick											
Reviewer, Rick											
Reviewer, Rosie											

Reviewer, Michelle

Document Number	Date Selected	Date Invited	Response / Status	Response Date	Date Assigned	Date Completed	Review Time
WRK4-16-Dec-0064	3/13/2017						
WRK4-17-Feb-0001	4/4/2017	4/4/2017	Agreed	4/4/2017	4/4/2017	4/4/2017	0.00

Build Your Own Reports

To build your own report from scratch, first determine the type of report you want to build. It's often helpful to make a list of the reports criteria you'll be using and use it to select the Build Your Own reporting package you'd like to use to create your report.

Once you have selected the reporting package you'd like to use, you will be taken to Query Studio.
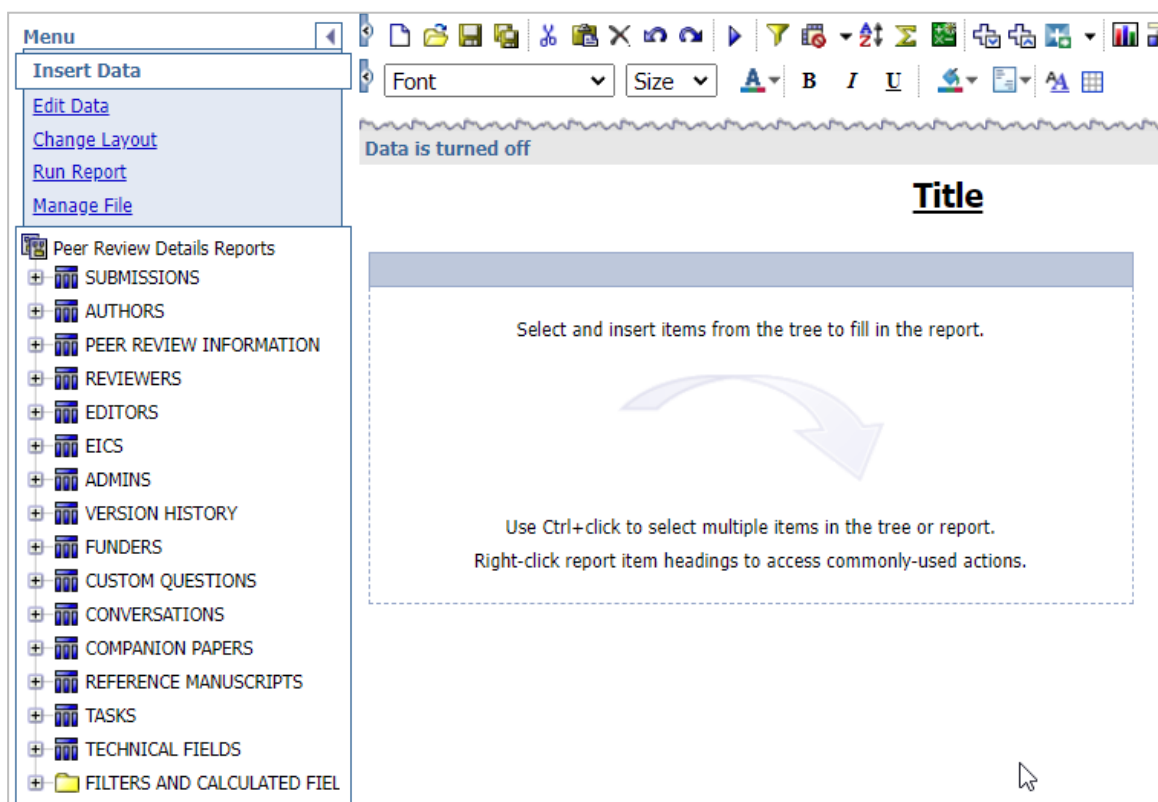
The Data Tree

In order to start building a new report, use the **Insert Data** menu item in the menu bar on the left. Expand the folders in the data tree (fields list) to view the fields that can be used. The folder tree is organized into logical groupings of fields. Depending on the reporting package you're using, the folders and fields will be different and tailored to the exact type of report you're trying to create. Each section can be expanded and collapsed to find the fields you are looking for.
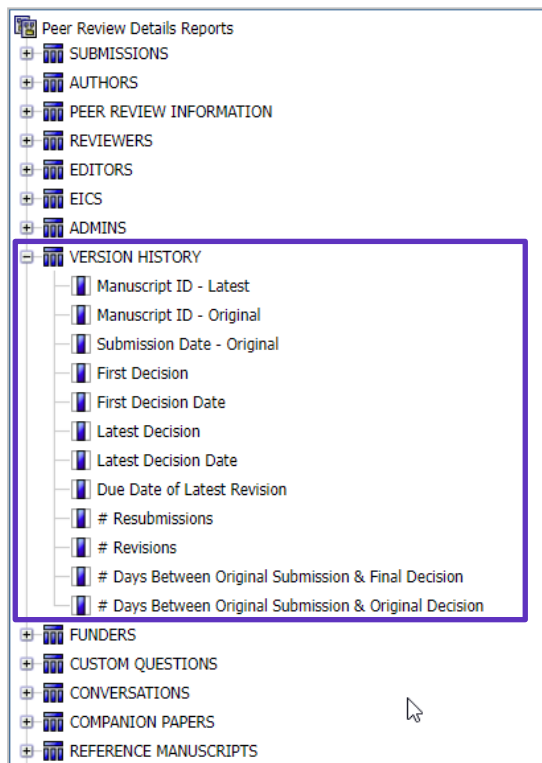
You may hover your mouse over the field name to view the definition and formatting notes. Clicking the arrow to the right of the Information text at the bottom of the Insert Data section will show you a definition of the selected field along with any formatting notes.
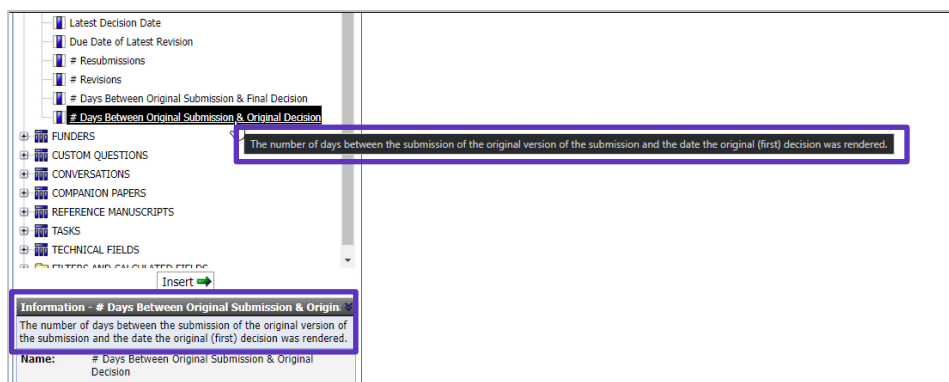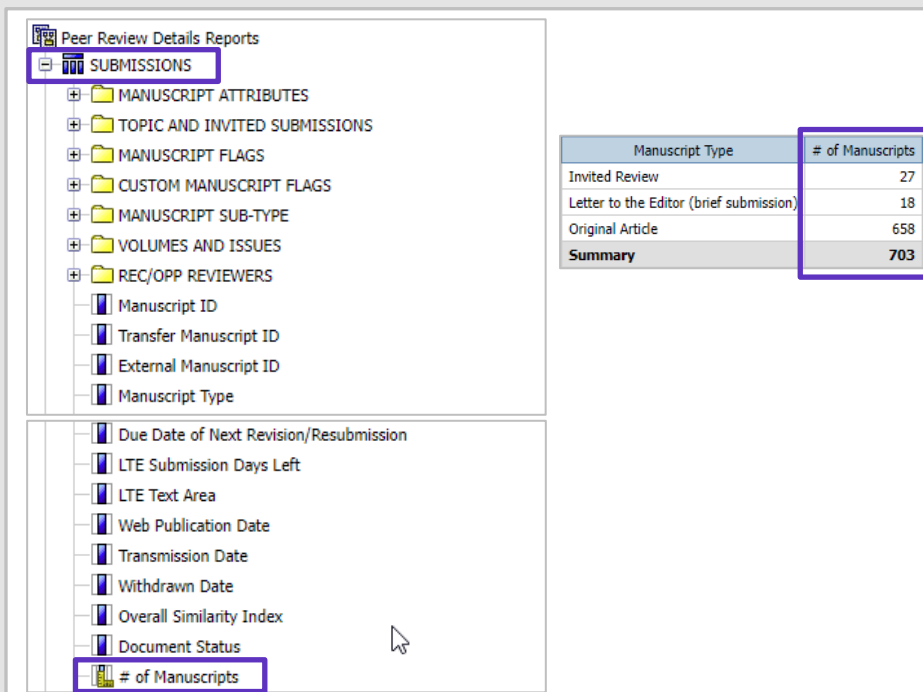
Note: A list of all the data fields and which packages they are in can be found in the FAQ's in Get Help Now.

Filters and Calculated Fields

Within many of the Build Your Own Reports packages, you will find a section in the data tree called **Filters and Calculated Fields.** These filters are predefined filters that can be used to create reports based on items such as Manuscript Status, submission date, decision date and due dates of revisions and resubmissions.
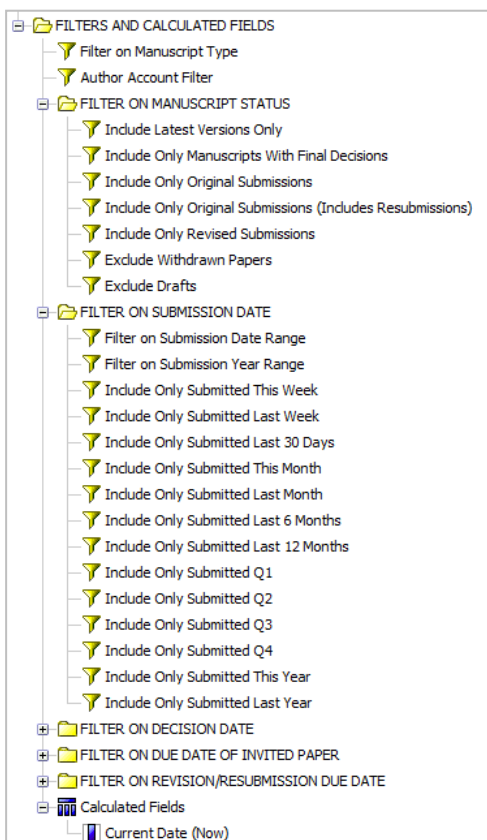
Tip: To create a column in your reports for specific counts, such as the number of manuscript types, counts. use the **# of Manuscripts** data field located in the **Submissions** section of your data tree.

Inserting Fields into a Report

To insert fields from the data tree into a report, double-click the field.
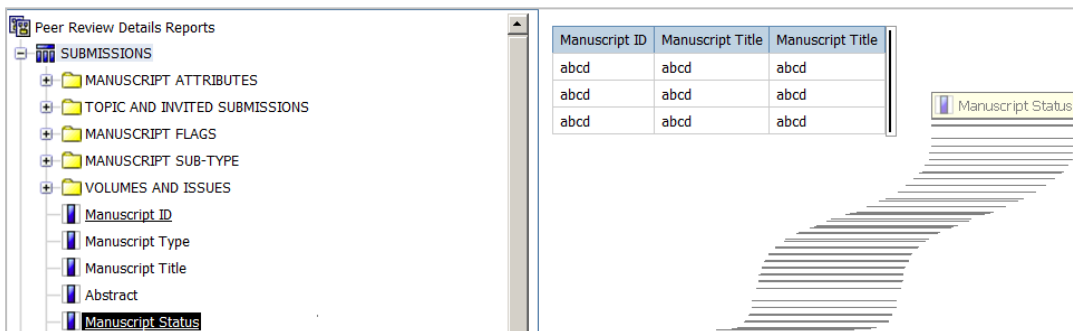
Note: The option to drag and drop data into a report only works with **Internet Explorer.**

Running The Report

By default, when you are creating a report, the data is turned off so the screen will not keep refreshing with data. When you are ready to see a report with actual data, you can choose from the menu section called to **Run Report** or click on the **Run once with all data** at the bottom of the screen.

29
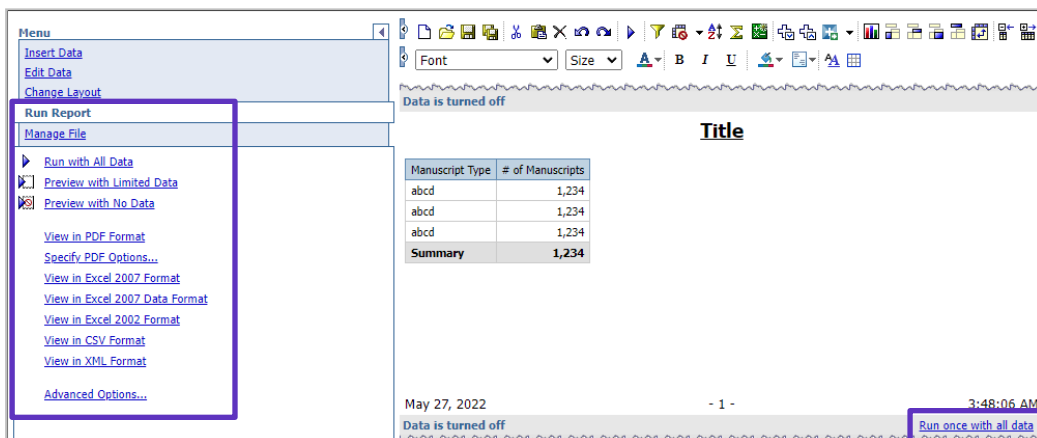
Edit Data

There are three ways to access the ability to edit data.

1. From the Menu

2. Icons across the top of the screen

3. Right-click on a column of data to get a subset of options
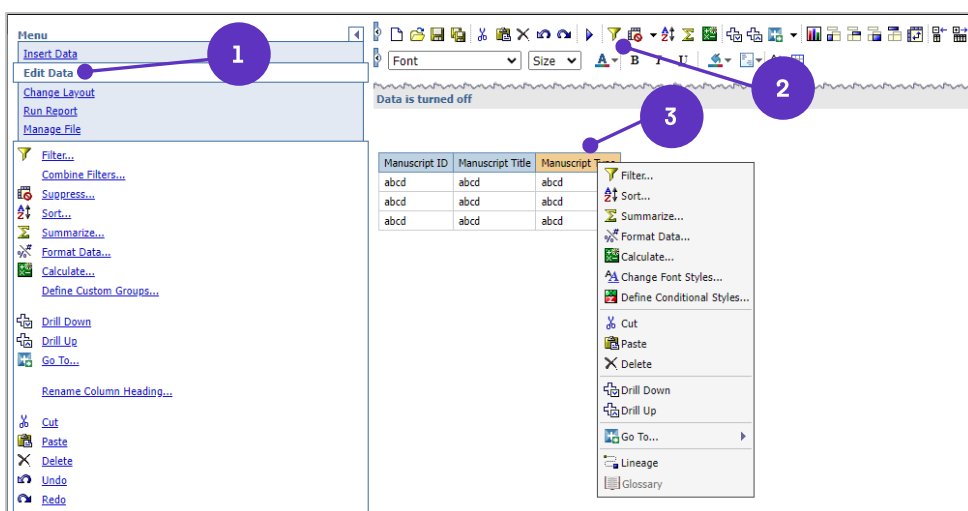
The sections below describe the ways to edit data.

Creating Filters in a Report

Report results can be filtered so that only the data you need is visible.

Pick Values from a List

You can select values via a check box from the list of all existing filterable values.

30

There are three options that can be applied:

1. Show only the following or Do not show the Following (NOT)

2. Show or leave out missing values (blanks)
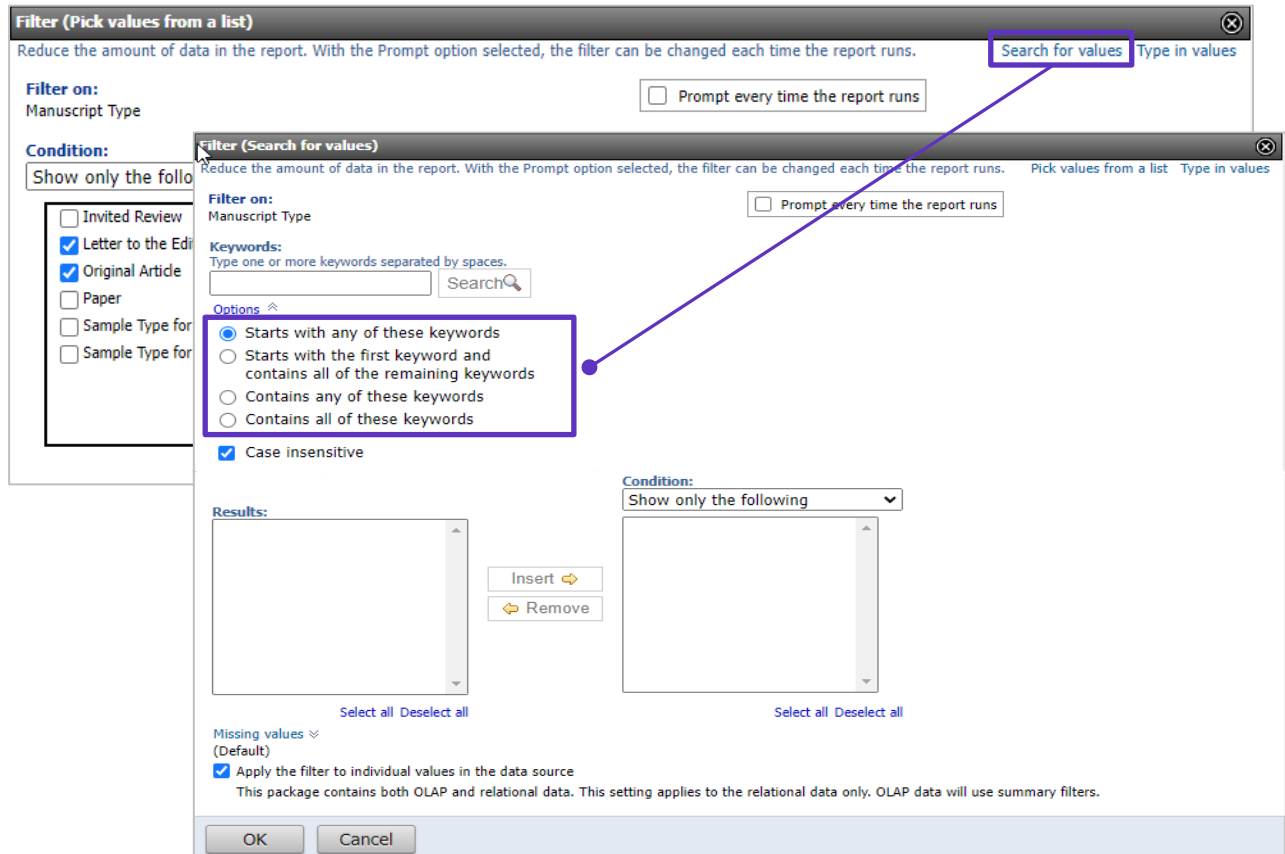
3. Prompt every time the report runs (This option will allow you change filter options every time you run the report)

Search for Values

This option allows you to search for existing values in a field, instead of having to select from a list.

Enter your keywords then select one of the following **Options**:

- Starts with any of these keywords

- Starts with the first keyword and contains all of the remaining keywords

- Contains any of these keywords

- Contains all of these keywords

Additionally, you can designate if your search string is case sensitive.

<u>Type in Values</u>

You can type values in directly to be filtered on.

You can select an operation of Exact Matches, Starts with, Ends with, or Contains.

Sorting Data

You can change the sort from ascending to descending on a column, by right-clicking on the column and selecting Sort. At the bottom of the screen, you will then be able to choose the order you need.

Right-click on the column and select Sort

Select the Sort Order you need
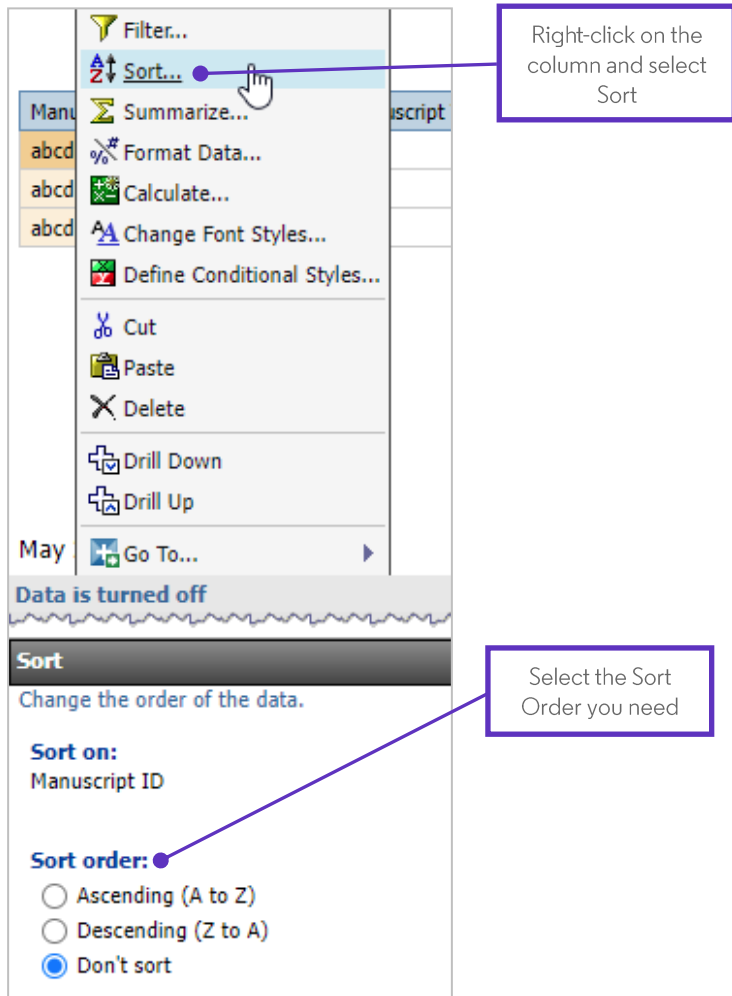
Summarizing Data
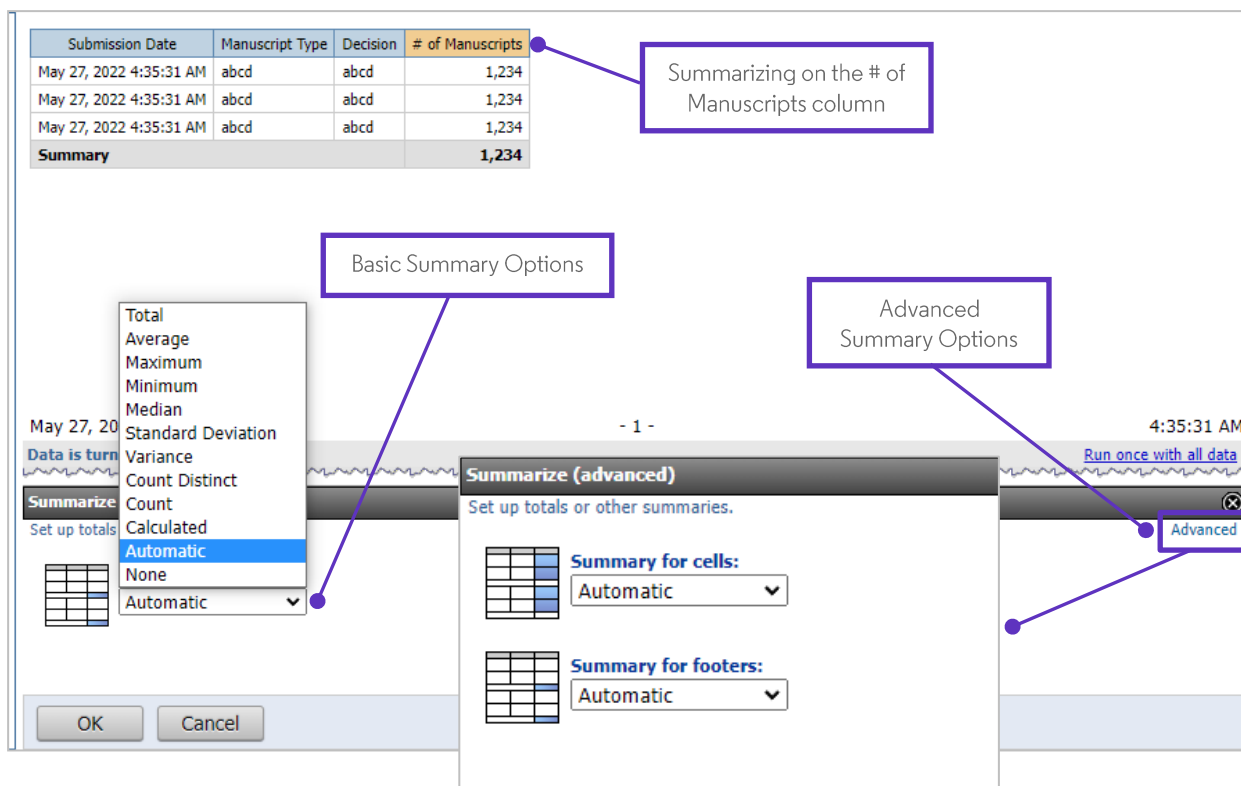
The **Summarize** feature allows you to create footers in your report. To summarize based on a particular field, right-click the desired column heading and click the Summarize button.

The following options are available when you use the **Basic** summarize. The summary row will display one of the following:

- Count (This is the number of rows with populated data in the grouping)
- Count Distinct (This is the number *distinct* of rows in the grouping)
- Total
- Average
- Maximum
- Minimum
- Median
- Standard Deviation
- Variance
- Calculated or Automatic (This is the default summary, based on the type of field that is being summarized)

You will also have the option to use the Advanced summary option, allowing you to create as **Summary for cells** and a **Summary for footers**.

Formatting Data

 Format Data...

There are times when the dates displayed in reports do not match the format you would like to use. For example, the Submission Date column may use the month, day, year, and time of submission. To change this so the column only lists date of submission, right-click on the Submission Date column and select **the Format Data** option. You can then select the format that you would like the data to be displayed in and click OK.

Creating Calculations
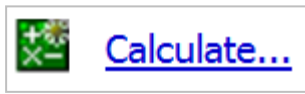
 Calculate...

You can add a column containing calculated data to report results. To create a calculated field control-click the column headings to be used in the calculation and click the **Calculate** button.

Note: You can create a calculation on a single field or between more than one field.

When you click **Calculate**, you are presented with various Operations for use. Based on the type of field you are using to calculate, different Operations will appear.

36

There are three common types of fields:
1. Date fields (e.g. Submission Date)
2. Count fields (e.g. # Reviews Submitted)
3. Text fields (e.g. Manuscript Title)

Date fields have the following Operations (between one or more fields):
- Difference, Difference in Days, Months and Years
- Adding Days, Months or Years
- Earliest
- Latest
- Showing Year, Month, Month (number), Week, Day, Hour, Minute, Second

Count fields have the following Operations (between one or more fields): Operation Type – Arithmetic
- Sum
- Difference
- Multiplication
- Division (of another field or a particular value)
- Operation Type – Percentage
- Percentage (field as percentage or another field or a particular value)
- Percentage of Total
- Percentage of Footer
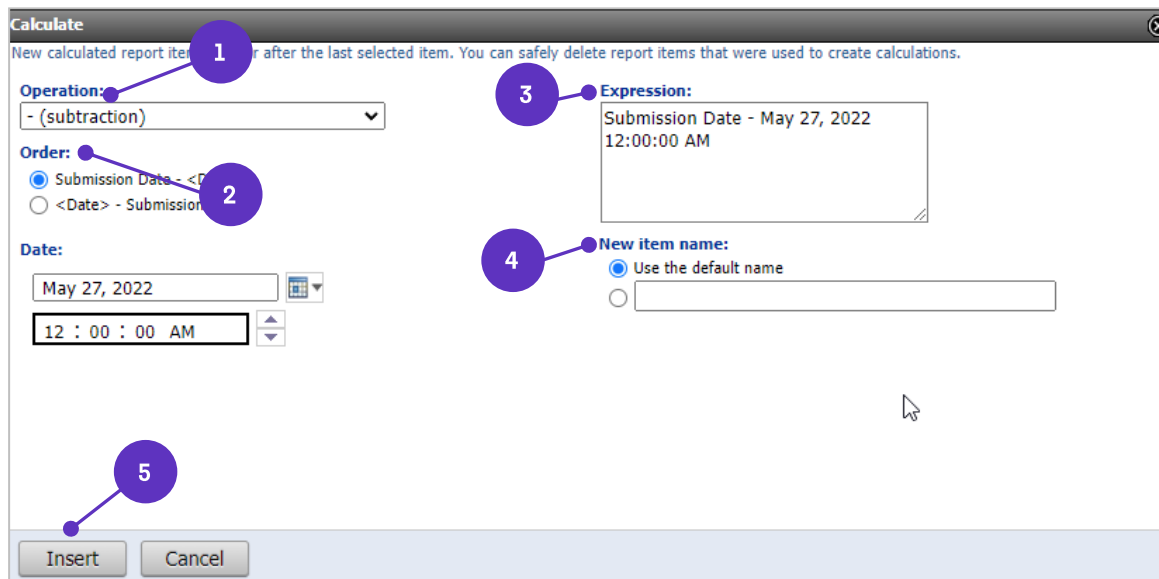
Text fields have the following Operations (between multiple fields only):
- Concatenation

Tip: After selecting the desired Operation, check the **Expression** section before inserting the calculation. This will tell you exactly what will be defined in the resulting column. Once you have verified the calculation, click **Insert**.

When creating a calculation, remember these steps:

1. Choose the **Operation.**

2. Check the **Order.**

3. Check the **Expression.**

4. Enter the **New Item Name.**

5. Click **Insert.**

Cut, Paste, Delete, Undo and Redo

Click a column heading and use the Cut, Paste, and Delete buttons to move a column of data to a new location within the table or to remove it from the report entirely. If you make a mistake, use the Undo or Redo button. To move a column, Cut the column you would like to move and left-click on the column to the right of the new location of the column, then click **Paste**.

Note: It is possible to delete a column and retain filters or calculations based on that column. If you delete a column with a filter, you will be prompted to either delete or retain the filter prior to the column being completely deleted.

Change Layout

Change Layout
Run Report
Manage File

Chart...

Define Conditional Styles...

Change Font Styles...

Change Border Styles...

Reset Font and Border Styles

Apply Template...

Edit Title Area...

Set Web Page Size...

Set Page Breaks

Group

Pivot

Ungroup

Create Sections

Swap Rows and Columns

Collapse Group

Expand Group
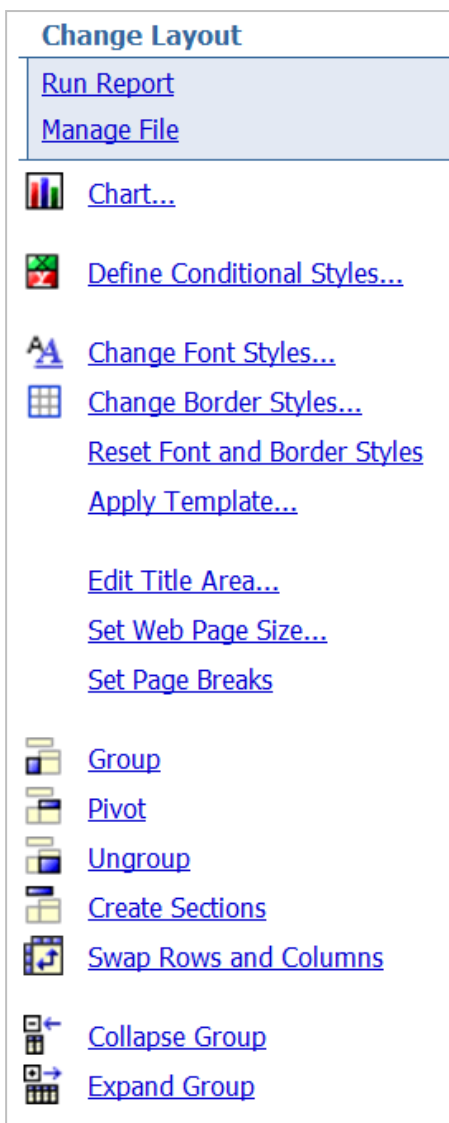
The ability to change the layout of a report can make a report look very clean for a presentation. Items such as grouping information can reduce the number of times a specific item appears in a report.

Note: If you are looking for raw data, it is best to not make changes to the layout in Cognos, but export to excel first and make changes there

Chart

The Cognos interface supports pie charts, line graphs, bar charts, and many other types of charts and graphs. To create a chart:

1. Choose your type of chart.

2. Choose show values on the chart (optional).

3. Select if you want the chart and table or chart only.

4. Click **OK.**

Tip: Creating a chart only works if you have a count or summary field included in the report.

Define Conditional Styles
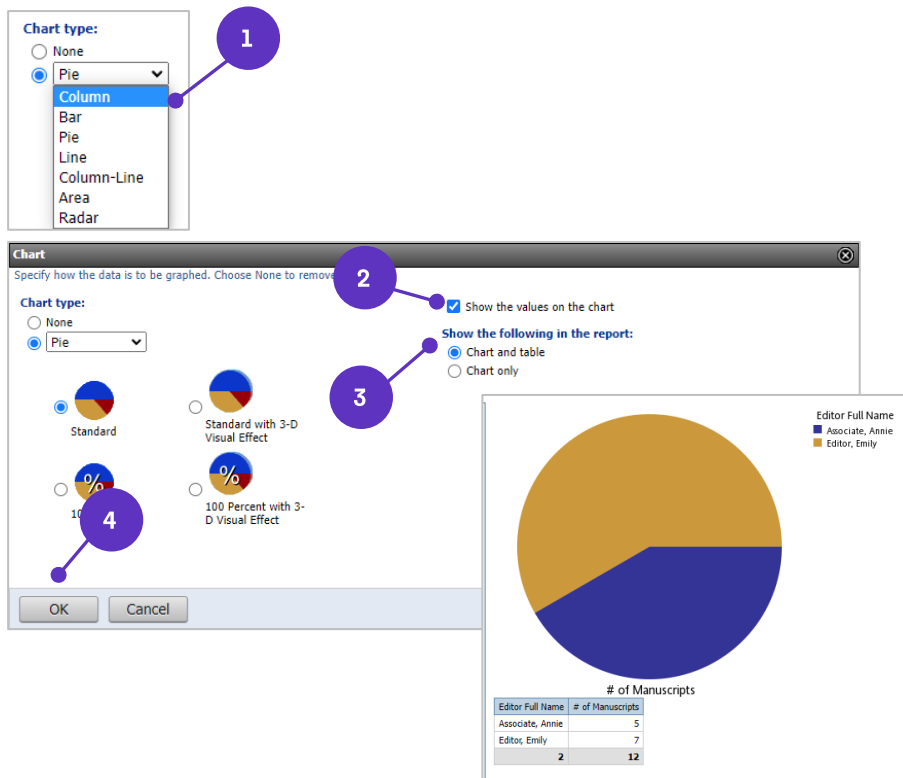
Define Conditional Styles...

Conditional formatting enables you to format cells based on the values within them. To set up conditional formatting, first select the column you want to format. Then, under the Change Layout menu on the left side of the screen, select **Define Conditional Styles**.

To define the display of certain values, enter the threshold before and after which the values on the report will be displayed in different styles into the **New value** text box and click the Insert button.

Select the style in which you'd like to display the results that fall above or below the value you entered. This is done by clicking the **pencil icon** within the value range. You can enter multiple time intervals and styles, and then click **OK** to apply these changes to the report.

Formatting Options

The look of report results can be altered by using the formatting tools. Use the toolbar to change border styles, alignment, and font styles, sizes, weights, and color.

You can also change the name of any reporting column. Double-click on the column header and type in the desired name of the column. Click **OK**.
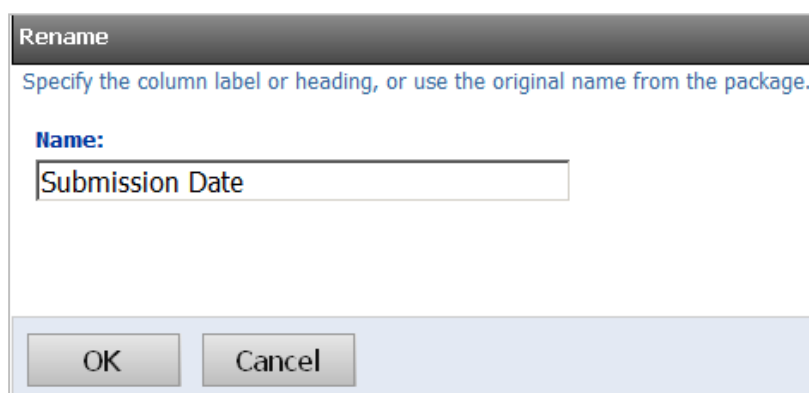
Group and Ungroup

If a column in a report contains multiple instances of the same value, you may wish to group these identical values together. Grouping reorders the rows of a selected report so that identical values appear together and suppresses the display of duplicates. To group or ungroup data, click the column heading for the data you would like to group, and then click the **Group** or **Ungroup** button.

Manuscript Type	Manuscript Status	Manuscript ID
Original Article	Reject with Transfer	WRK4-13-Nov-0006
Original Article	Invite Reviewers;Track Conflict Forms	WRK4-13-Nov-0007
Original Article	Invite Reviewers;Track Conflict Forms;Track Copyright Forms	WRK4-13-Nov-0008
Original Article	Transferred To bmjdrc	WRK4-13-Sep-0003
Original Article	Transferred To bmjdrc	RK4-13-Sep-0004
Letter to the Editor (brief submission)	Reject Transfer	RK4-13-Sep-0005
Invited Review	Assign Reviewers	WRK4-14-Apr-0010
Original Article		-0011
Original Article		-0011.R1
Original Article		g-0017
Original Article		n-0018

Without Grouping

With Grouping

Manuscript Status	Manuscript Type	Manuscript ID
Accept	Original Article	WRK4-14-Dec-0029.R1
	Original Article	WRK4-2009-08-0016
	Original Article	WRK4-2009-09-0034
	Original Article	WRK4-2010-02-0010
	Original Article	WRK4-2010-02-0011
	Original Article	WRK4-2010-02-0017
	Original Article	WRK4-2010-08-0042
	Original Article	WRK4-2010-11-0059
	Original Article	WRK4-2011-02-0006
	Original Article	WRK4-2011-06-0027
	Original Article	WRK4-2013-02-0001
Assign AE	Original Article	WRK4-19-Sep-0012
Invite Reviewers	Original Article	WRK4-14-Jan-0007
	Original Article	WRK4-15-Apr-0007

Pivot

🗔 Pivot

Crosstab reports are useful for more concisely summarizing or grouping like information. To create a crosstab report, open the report that you would like to use, click the column header that you would like to use for the top row in the crosstab, and then click the **Pivot** button.

Manuscript Type	Submission Month	# of Manuscripts
Letter to the Editor	May	1
Letter to the Editor		**1**
Original Article	April	1
	August	4
	July	5
	June	1
	May	3
	November	1
	October	1
Original Article		**16**
Summary		**17**

Before Pivot

After Pivot

# of Manuscripts	Letter to the Editor	Original Article	Summary
May	1	3	4
April		1	1
August		4	4
July		5	5
June		1	1
November		1	1
October		1	1
Summary	**1**	**16**	**17**

Create Sections

Create Sections

Sectioning a report allows you to display the value of a selected report item as the heading of a section. To create sections, click the column heading that you would like to use as the section header, and then click the **Create Sections** button.

Manuscript Type	Submission Month	# of Manuscripts
Letter to the Editor	May	1
Letter to the Editor		**1**
Original Article	April	1
	August	4
	July	5
	June	1
	May	3
	November	1
	October	1
Original Article		**16**
Summary		**17**

Before Sections

Manuscript Type: Letter to the Editor

Submission Month	# of Manuscripts
May	1
Letter to the Editor	**1**

Manuscript Type: Original Article

Submission Month	# of Manuscripts
April	1
August	4
July	5
June	1
May	3
November	1
October	1
Original Article	**16**
Summary	**17**

After Sections

44

Swap Rows and Columns

Swap Rows and Columns

You can swap rows and columns in Pivot (crosstab) reports. To swap rows and columns, click the **Swap Rows and Columns** button.

Run Report

The Cognos reporting tool supports a variety of export formats, including PDF, Excel, CSV, and XML. The steps for exporting report results are different for Standard and Build Your Own Reports.

From the menu, click the viewing option you would like, and the system will prompt you to open or save the file in the specified format.

Run Report

Manage File

▷ Run with All Data

▷ Preview with Limited Data

▷ Preview with No Data

View in PDF Format

Specify PDF Options...

View in Excel 2007 Format

View in Excel 2007 Data Format

View in Excel 2002 Format

View in CSV Format

View in XML Format

Advanced Options...

Manage File

Manage File

📄 New

📂 Open...

💾 Save

💾 Save As...

Report Definition...

My Preferences...
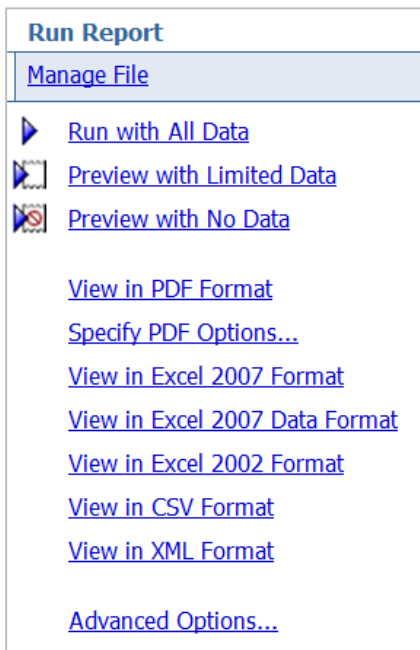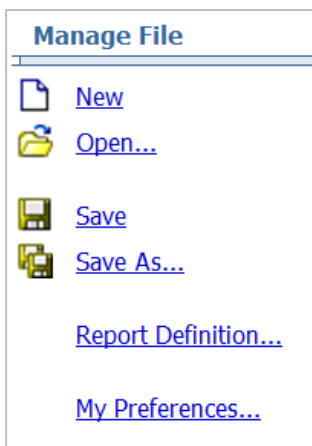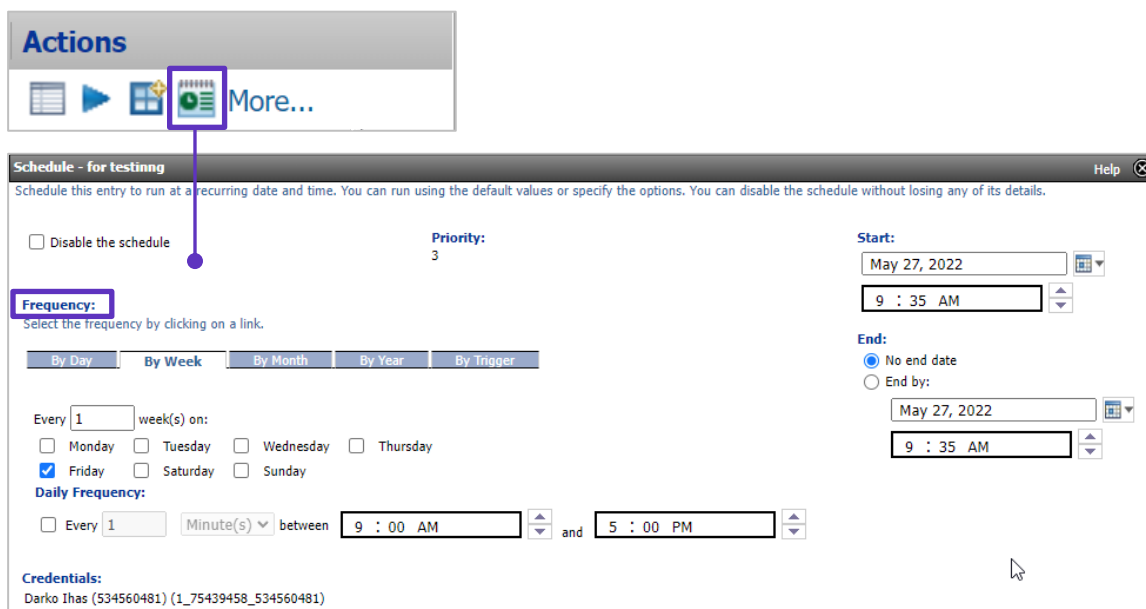
- **New**: Create a new Build Your Own report from within Query Studio. Alternatively, you can go to the menu on the left-hand side and click on **Manage File** to access the same link.

46

- **Open**: Open an existing user-built report within Query Studio. Alternatively, you can go to the menu on the left-hand side and click on **Manage File** to access the same link.

- **Save**: Save the report or click the **Save As** button to save the report under a new name or in a new folder.

Note: If you save the report to My Folders, please note that it will only be available as long as the Admin role in ScholarOne Manuscript is active and unexpired.

Scheduling a Report

Any report you have saved in your **My Folders** can be scheduled to be delivered to you and to other people in your organization. Locate the scheduling icon in the actions section of your list of reports. Click the **Schedule** icon beside the report you would like to schedule. The first thing you can set is the **Frequency** of how often you would like the report to be delivered. You can choose from daily, weekly, monthly or yearly options.

Next, by checking the **Override the Default Values** check box, you can select the **Format** and **Delivery** of your report. Be sure that you uncheck any options you do not want.
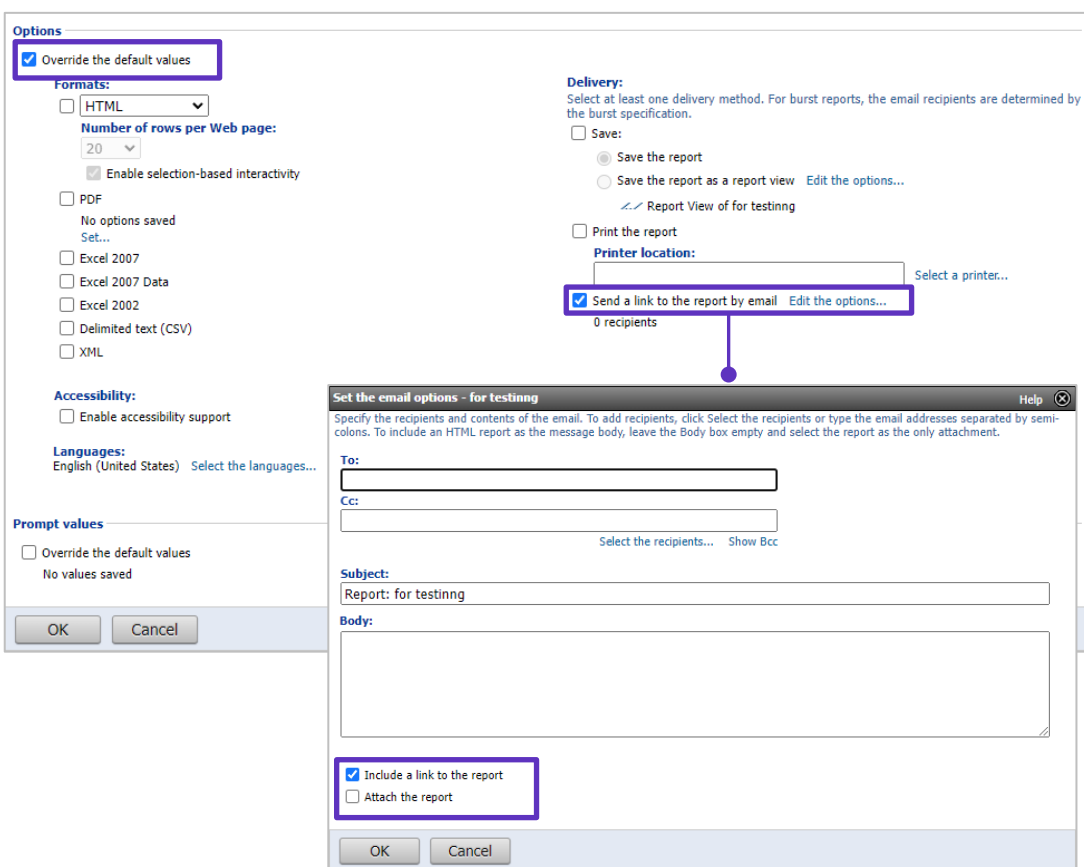
When setting up the report to be sent by e-mail, check the box beside the **Send a link to the report by e-mail** option. Then to designate how the e-mail will look, click the **Edit the options...** link.

There are several options to choose from:

Include a link to the report – The recipient will need to log in to ScholarOne Manuscripts with their User ID and Password to access the report via the e-mailed link. Because of this authentication, the user will only see data that they have permissions to see (Editors will only see data related to submissions they are assigned to).

Attach the report – When you attach the report as a file, the recipient(s) will see exactly what you see. This means an Editor would be able to see information about all submission and not just the one they are assigned to.

Note: The **Print the report** option does not apply to ScholarOne Manuscripts.

A Step-By-Step Example of Creating a Custom Report

The custom report will be created using the Peer Review Details report package

Your Editor-in-Chief asks you to build a report for the annual meeting. He wants a report about **Original Submissions.** He tells you that the report needs to have how many manuscripts were submitted for the last quarter of 2013. He wants the information broke down into the number manuscripts by each **Editor**, then how many reviewers were invited and reviewed the paper, as well as what the editor **decision** was on the paper and the **Manuscript Type**.

The first thing you need to do is determine which pre-defined Filters and Calculated Fields you can use for the report.

1. Expand the Filters and Calculated Fields Folder

2. Expand the Filter on Manuscript Status Folder

3. Double-click the Included only Original Submission filter

4. Expand the Filter on Submission Date folder

5. Double-click on the Filter on Submission Date Range filter

6. After you have combined the filters, you will see them on the header section of the right side of the screen where you are creating the custom report
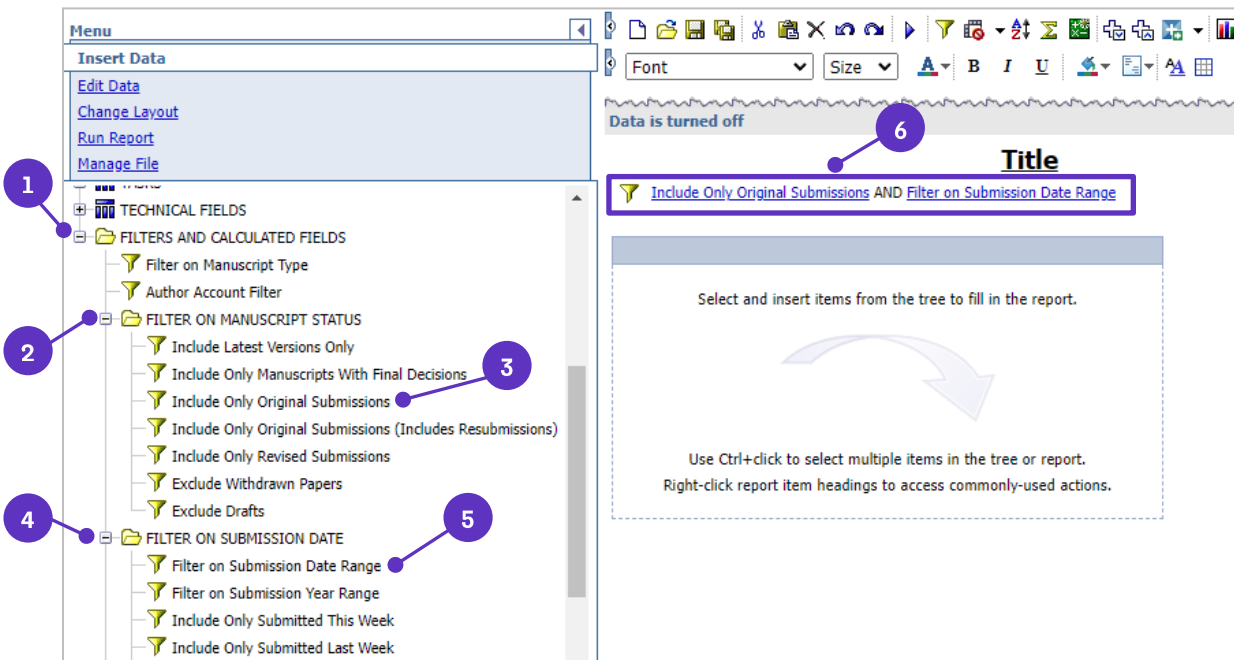
Now you have to choose which data elements you will need for the report:

- Manuscript Type

- Manuscript ID Number

- Number of Manuscripts

- Number of Invited Reviews

- Number of Completed Reviews

- Manuscript Decision or Recommendation (this will depend on your workflow)

- Editor Full Name

Manuscript Type	Manuscript ID	# of Manuscripts	Recommendation	# Reviewers Invited	# Reviews Completed	Editor Full Name
abcd	abcd	1,234	abcd	1,234	1,234	abcd
abcd	abcd	1,234	abcd	1,234	1,234	abcd
abcd	abcd	1,234	abcd	1,234	1,234	abcd
Summary		**1,234**				

The data elements can be found for this report in the following sections:

- Submissions

- Peer Review Information

- Editors
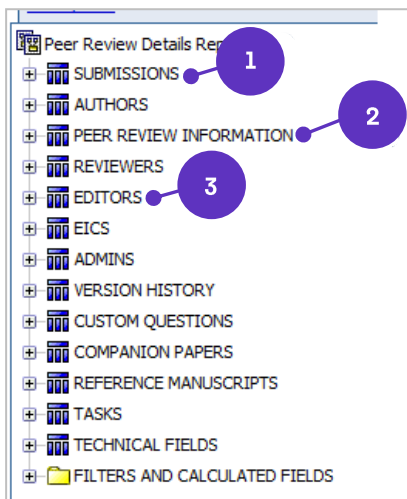
If you run the report now, you will notice that the information is not very well organized.

Manuscript Type	Manuscript ID	# of Manuscripts	Recommendation	# Reviewers Invited	# Reviews Completed	Editor Full Name
Article for Fast Track Review	CHA-00523-FT-2013	1	Reject	2	1	Dodick, D
Article for Fast Track Review	CHA-00526-FT-2013	1	Accepted with Major Revisions	3	2	Dodick, D
Brief Report	CHA-00348-BR-2013	1	Reject	0	0	Ferrari, Mich
Brief Report	CHA-00396-BR-2013	1	Reject	2	1	Evers, Stef
Brief Report	CHA-00414-BR-2013	1		1	1	Wang, Shu
Brief Report	CHA-00425-BR-2013	1	Reject	0	0	Dodick, D
Brief Report	CHA-00434-BR-2013	1	Accepted with Major Revisions	3	2	Ducros, A
Brief Report	CHA-00438-BR-2013	1	Reject	1	1	Purdy, A

The report will require some changes to the layout. Grouping the columns of information will change the look of the report. When grouping information, it is important to decide what order you want the columns to be in. Since the EIC wants the report based on the Editor, you will Group by Editor Full name first.

Group the columns in the following order:

- Editor Full Name
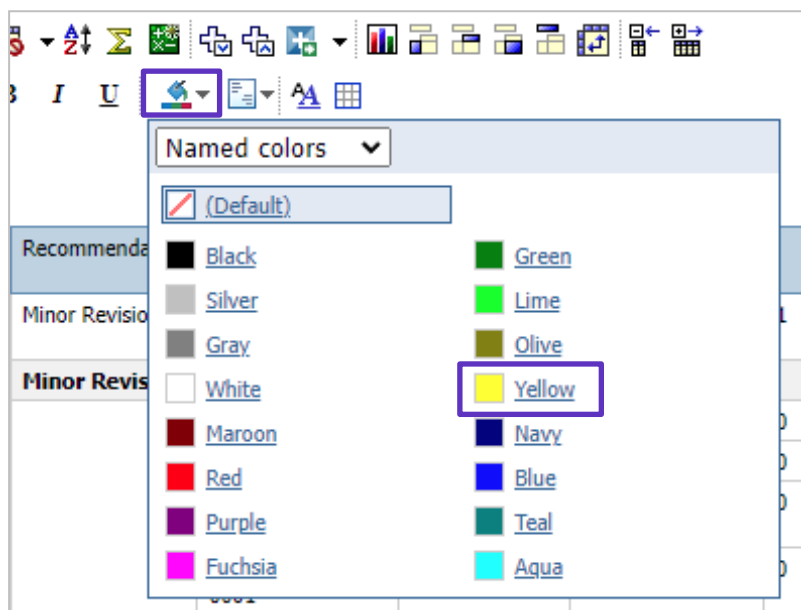
- Manuscript Type

- Recommendation

Then run the report with data. The information is now grouped by Editor, and the gray section shows the total number of manuscripts.

Editor Full Name	Manuscript Type	Recommendation	Manuscript ID	# of Manuscripts	# Reviewers Invited	# Reviews Completed
Associate, Alfred	Original Article	Minor Revision	WRK4-21-Feb-0001	1	1	1
		Minor Revision		**1**		
			draft	1	0	0
			WRK4-16-Jul-0027	1	0	0
			WRK4-17-Oct-0016	1	0	0
			WRK4-19-Mar-0001	1	1	0
			WRK4-22-Apr-0006	1	1	1
			WRK4-22-Mar-0003	1	1	1
				6		
	Original Article			**7**		
Associate, Alfred				**7**		
Associate, Alma	Original Article		WRK4-16-Jan-0006	1	1	1
			WRK4-2009-06-0004	1	3	0

To make this section stand out for the report, we can highlight the area above by changing the background color.
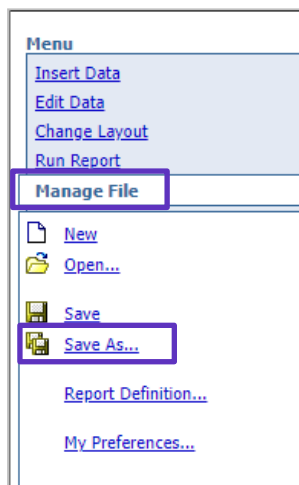
Left-click on the gray section of the Editor Full name so that it is highlighted, and then choose the paint can icon to change the background color to yellow. Repeat the process for the gray section in the number of manuscripts column and run the report again.

The report results will now have an easy to read highlighted section for each Editor.

Editor Full Name	Manuscript Type	Recommendation	Manuscript ID	# of Manuscripts	# Reviewers Invited	# Reviews Completed
Associate, Alfred	Original Article	Minor Revision	WRK4-21-Feb-0001	1	1	1
		Minor Revision		**1**		
			draft	1	0	0
			WRK4-16-Jul-0027	1	0	0
			WRK4-17-Oct-0016	1	0	0
			WRK4-19-Mar-0001	1	1	0
			WRK4-22-Apr-0006	1	1	1
			WRK4-22-Mar-0003	1	1	1
				6		
	Original Article			**7**		
Associate, Alfred				**7**		
Associate, Alma	Original Article		WRK4-16-Jan-0006	1	1	1
			WRK4-2009-06-0004	1	3	0
				2		
	Original Article			**2**		
Associate, Alma				**2**		
Associate, Annie	Original Article		WRK4-16-Jan-0004	1	0	0
			WRK4-18-Mar-0024	1	0	0

Remember to save the report if you would like to use it in the future.

Menu
- Insert Data
- Edit Data
- Change Layout
- Run Report

Manage File

- New
- Open...
- Save
- Save As...
- Report Definition...
- My Preferences...

If you require technical assistance, please contact Customer Care at s1help@clarivate.com.

About Clarivate

Clarivate™ is a global leader in providing solutions to accelerate the pace of innovation. Our bold mission is to help customers solve some of the world's most complex problems by providing actionable information and insights that reduce the time from new ideas to life-changing inventions in the areas of Academia & Government, Life Sciences & Healthcare, Professional Services and Consumer Goods, Manufacturing & Technology. We help customers discover, protect, and commercialize their inventions using our trusted subscription and technology-based solutions coupled with deep domain expertise. For more information, please visit clarivate.com.