

Safari Account Manager Instructions
For Usage Reports and MARC Records
in Back Office 3

April 2006

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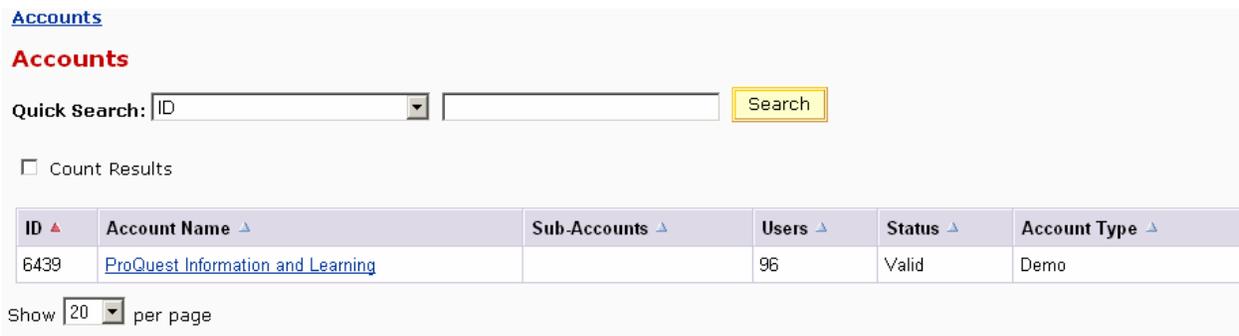
How to Access the Safari Back Office

To access the Safari Back Office (BO), you will have to go to the following URL: <https://safari.bo.bvdep.com/bo3> and enter the User Name and Password provided in the email "Safari Account Manager Confirmation". Hit login.



The image shows the Safari Tech Books Online login interface. At the top, there is a red banner with the Safari logo and the text "Safari TECH BOOKS ONLINE". Below the banner, the word "Login" is displayed in red. There are two input fields: "User Name" with the value "test_ts@il.proquest.com" and "Password" which is empty. A yellow "Login" button is positioned below the password field.

This is a secure login to the Safari BO. Please make sure that your browser is set to accept session cookies. Once you're successfully logged on, a screen, similar to the one below, will display your main account and the sub-accounts associated with it:



The image shows the "Accounts" management page. It features a "Quick Search" section with a dropdown menu set to "ID" and a "Search" button. Below the search section, there is a checkbox for "Count Results". A table displays account information with columns for ID, Account Name, Sub-Accounts, Users, Status, and Account Type. The table contains one row with ID 6439, Account Name "ProQuest Information and Learning", 96 Users, Valid Status, and Demo Account Type. At the bottom, there is a "Show 20 per page" option.

| ID ▲ | Account Name ▲ | Sub-Accounts ▲ | Users ▲ | Status ▲ | Account Type ▲ |
|------|---|----------------|---------|----------|----------------|
| 6439 | ProQuest Information and Learning | | 96 | Valid | Demo |

From here, you can click on the Main Account name link to access your account configuration.

How to Run Safari Usage Reports

To access the Safari Usage Reports, simply click on the “Reports” link in the banner at the top of the screen.



Two links appear: “My Reports” and “Report Runner”. The “My Report” link offers a history of the reports you’ve run. Clicking on “Report Runner” leads you to specific report options:

[Reports](#)

Report Runner

- [Content Reports](#)
Use these reports to get an idea of how individual products are being accessed. These reports are similar to usage reports except they are geared toward the content, not users or accounts
- [Usage Reports](#)
Select this category to build listings of how users are working with the service. This is where you'd go to build reports showing how users are working with our content.

The Safari usage reports track the activity of every Sub Account under a Master Account. All reports, by default, will show you the activity for the current month.

To make things efficient and easy for you, you can click on “Run” to the right of the template title link for an instant report. Or, you can make some minor edits to the report. (*Safari offers step-by-step instructions to run a few of the most common requested reports below.*)

Our new report system allows you to define your report criteria in specific sections. Here are a few report sections and their definitions:

Aggregates: Aggregates allow you to perform arithmetic on the columns of the tables used to construct your reports.

Basic Report Information: Use this section to edit basic information about the report you want to run. If you want to change the output format, for example, click on the Edit link and select a new output format.

Users: Use this section to exclude certain users from your reports; change the fields in your report or change the aggregates or order of the information in your report

View's Event: In this section, you can make your report date specific.

We encourage you to practice using different criteria in running these various reports. There are a myriad of criteria and templates for you to choose from.

Following are descriptions and a few suggestions for running usage reports that capture your institution's book usage in Safari.

Report: Summary Hits Report

Click on Reports/Report Runner/Usage Reports,

At the right of the template link "Summary Hits Report," click on "run." The report will run for the current month.

OR

Click on Reports/Report Runner/Usage Reports,

Click on the linked template title "Summary Hits Report".

On the next page, click the linked word "Edit" next to "Basic Report Information" to change the title of the report. Click the "Save" button at the bottom of the page.

On the next page, click the hyperlinked word "Edit" next to "Views" to change the dates for which the report data is generated. On the next page, fill in the desired dates under the heading "Filters" and then click the "Save" button at the bottom of the page.

On the next page, click the hyperlinked word "Edit" next to the word "Books" to edit the Book information that will display in the report. Under the heading "Fields/Groups," you can add fields to be displayed by clicking the "Add" button to add additional rows, and selecting the field headings from the drop down menu. For example, you can add "Points" to the display to show the number of slots assigned to each book. Click the "Save" button at the bottom of the page.

On the next page, click the hyperlinked text "Run Now."

Report: Session Turnaway Report

Click on Reports/Report Runner/Usage Reports

At the right of the template link "Session Turnaway Report," click on "run." The report will run for the current month. The report summarizes the number of successful and rejected sessions for IP-based accounts.

OR

Click on Reports/Report Runner/Usage Reports

Click on the linked template title "Session Turnaway Report"

On the next page, click the linked word "Edit" next to "Basic Report Information" to change the title of the report. Click the "Save" button at the bottom of the page.

On the next page, click the hyperlinked word "Edit" next to "Sessions" to change the dates for which the report data is generated. On the next page, fill in the desired dates under the heading "Filters" and then click the "Save" button at the bottom of the page

On the next page, click the hyperlinked text "Run Now."

Report: Bookshelf Usage Report

Click on Reports/Report Runner/Usage Reports

At the right of the template link "Bookshelf Usage Report," click on "run." The report will run for the previous month. The report will list all of the books on a user's bookshelf during the previous month. This is especially useful for libraries that purchase slots and select their own books.

OR

Click on Reports/Report Runner/Usage Reports

Click on the linked template title "Bookshelf Usage Report"

On the next page, click the linked word "Edit" next to "Basic Report Information" to change the title of the report. Click the "Save" button at the bottom of the page

On the next page, click the hyperlinked word "Edit" next to "Royalties" to change the dates for which the report data is generated. On the next page, fill in the desired dates under the heading "Filters" and then click the "Save" button at the bottom of the page.

On the next page, click the hyperlinked text "Run Now."

After you hit "Run Now", the screen will change and you'll see this box alerting you that the system has received your report request as well as the screen below:



| ID ▼ | Template Title ▲ | Description ▲ | Report Run ▲ | Format ▲ | Owner ▲ | Status ▲ | Size ▲ | View/Download ▲ |
|--------|-------------------------------------|---|------------------------|----------|-------------|----------|--------|-----------------|
| 894016 | Summary Hits Report | Summarizes Preview and View Hits by Account | 2006/04/18 13:58:21 | XLS | Scott Kuntz | Queued | | |

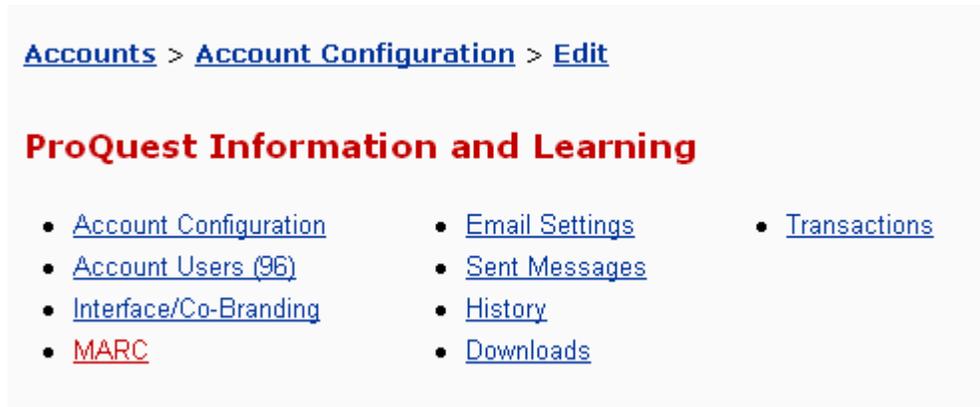
Hit the Refresh key periodically. When your report is ready, the grid will update to show changes under Status, Size and View Download columns.

| ID ▼ | Template Title ▲ | Description ▲ | Report Run ▲ | Format ▲ | Owner ▲ | Status ▲ | Size ▲ | View/Download ▲ |
|--------|-------------------------------------|---|------------------------|----------|-------------|-----------|--------|-------------------------------|
| 894016 | Summary Hits Report | Summarizes Preview and View Hits by Account | 2006/04/18 13:58:21 | XLS | Scott Kuntz | Truncated | 10 MB | View/Download |

Click on "View/Download", follow the steps to print off your new report. Your report may also be sent to your email address. Reports will remain under "My Reports" indefinitely.

How to Download MARC Records

Downloading MARC records in the new back office is very similar to the existing process. Select the MARC link at the top of the Account Configuration screen.



[Accounts](#) > [Account Configuration](#) > [Edit](#)

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- [Account Configuration](#)
- [Account Users \(96\)](#)
- [Interface/Co-Branding](#)
- **[MARC](#)**
- [Email Settings](#)
- [Sent Messages](#)
- [History](#)
- [Downloads](#)
- [Transactions](#)

There are three (3) options to select on the MARC records screen.



[Accounts](#) > [Marc](#)

ProQuest Information and Learning

- [Account Configuration](#)
- [Account Users \(96\)](#)
- [Interface/Co-Branding](#)
- [MARC](#)
- [Email Settings](#)
- [Sent Messages](#)
- [History](#)
- [Downloads](#)
- [Transactions](#)

MARC

- [Download a full set of MARCs for this account](#)
- [Download MARCs for books added to account since last full download](#)
- [Download MARC deletions from account since last full or incremental download](#)

Select the option that meets your download preference.

How to Contact ProQuest Customer Service

Customer Service and Technical Support for Safari Books Online is available through ProQuest. Please note the new contact information below.

Invoice and Billing

Call Toll-free 1-800-521-0600, ext. 2971

Email: customer_service@il.proquest.com

Technical Support (Access Questions)

Toll-free:1-800-889-3358

Email: technical.support@il.proquest.com