Research Intelligence

SciVal Reporting: Simple, time-saving tips & tricks

Anne-Sophie Muller :: Senior UX Specialist, SciVal

Chris James :: Senior Product Manager, SciVal

Aileen Christensen :: Global Marketing Manager, SciVal
This session is **being recorded** and all attendees will automatically receive a link to the video.
Question during the presentation?

Submit questions by using the “Ask a Question” feature on your screen. At the end of the presentation we will choose a few questions to answer.

For the questions we do not answer today, we will respond via email in the next few weeks.
Agenda

• Overview of Reporting
• User testing that’s been done since release
• Live demo
• Future Reporting enhancements
• Year range change
• Questions
Effortlessly set up and generate customized reports in SciVal

• Launched in January 2017
• Save time creating the same reports on a weekly, monthly or quarterly basis
• Reports are quick and easy to export and share with external stakeholders
• Save and re-run periodic reports - create a snapshot of your institute and compare it over time

As a research administrator, I am asked regularly generate reports with the indicators specified by my Vision and Strategy team.

As a Strategic Planner, I need to keep quarterly reports to undertake time series analyses.

As a research manager, I want to engage my academic community by creating reports of metrics of their interest.
Reporting section

Welcome to SciVal

Overview
Get a high-level overview of the research performance of your Institution, other Institutions, Countries and Groups of Researchers.

Go to Overview

Benchmarking
Compare and benchmark your Institution to other Institutions, Researchers and Groups of Researchers using a variety of metrics.

Go to Benchmarking

Collaboration
Explore the collaboration network of both your Institution and other Institutions.

Go to Collaboration

Trends
Get the current scientific trends to determine a new research strategy, find collaboration opportunities and rising stars.

Go to Trends

Reporting
Create rich Reports specifically tailored to support your institution’s distinct research strategy.

Go to Reporting
What is an Analysis?

• For Reporting, an Analysis is a combination of metrics that makes up one chart or table
How does it work?

• Most analyses from Overview and all from Benchmarking can be added to Reporting
  - Look for the + Add to Reporting button
• “What you see is what you get” system
  - Year ranges
  - Subject areas
  - Chart or table
  - Zoom
• One or more Analyses make up a Report
• A folder can contain one or more Analyses and/or Reports
Icons help visualize the reports

- Simple iconography gives a quick overview
- View the full details of an analysis

Folder = 📂
Report = 📃

Analysis
Line chart = 📈
Pie chart = 🍰
Bar chart = 🎈
Table = 📊
View and edit your reports

Your Analyses
- Ones already used in the report are light grey
- Drag and drop analyses to a report

Your Report
- Drag Analyses to arrange your Report
- Click > to view analysis details
View, add descriptions and export your report
Where?

10 customers from EU and Asia:
Ireland (3), UK (2), France (2), Australia (2), Singapore (1)
Who?

- **10 People** with different roles: managers (4), Research & data analysts (3), Director (1), Research administrator (1), librarian (1)

- All experienced with using SciVal

- All participants do reports on a regular basis (50% monthly / 50% weekly) and are main users on reporting

- All of them are very enthusiastic about using reporting and giving feedback
What was tested?

• Reporting **usability**
  How do they use the product? how can we improve their experience?

• Reporting **needs**
  What do they need?

• Feature **prioritization**
  What is the most important? And then?

• People **satisfaction**
  What do they think about SciVal interface?
Reporting Demo
Coming next

- **Filter** on views:
  - Hierarchy with folders
  - analyses only
  - reports only

- Possibility to **copy** (duplicate) reports and analyses to reuse them as templates

- Possibility to **merge** folders and reports

- **Optimize** / customize the report **layout**
And Then

- Guidance
- Analyses in **OV module** and then in **Collaboration** and **Trends**
- Set customized **updating frequency** for the reports (and get an alert)
- Create a report using a **wizard**
- Other **Export formats**
Year range change

- On 7 May we’ll move the year ranges in Overview, Collaboration and Trends by one year
  - i.e. new ranges will be: 2013 to 2018, 2015 to 2017, 2015 to >2018 etc
- This happens each year around this time

What does this mean for my reports?

- All reports from those modules will automatically receive the new dates
- Export the reports before 7 May to keep a snapshot of the data in those reports for comparison
Thank you.
Stay up to date: don’t forget to follow @SciVal on Twitter