

# HERITAGEQUEST™ ONLINE USAGE REPORT SYSTEM INSTRUCTIONS

HeritageQuest Online (“HQO”) usage statistics automatically become available one day after your subscription start date. You can retrieve your branch's report online at any time via a standard Web browser. No special setup is required, and you are automatically authenticated by your IP address as long as you access the reports from an in-library PC. The URL for **all client accounts** is:

<http://persi.heritagequestonline.com/hqoreports>

ProQuest CSA provides a COUNTER-compliant report for HQO usage (“Counter Database Report 1”), as well as some proprietary summary reports. Statistics include number of sessions; searches by collection; searches by search mode (Basic vs. Advanced, People vs. Places, etc.); searches by time; number of images downloaded or printed; and more.

## I. CREATE A USAGE REPORT

After pointing your browser to the above URL, follow these steps to create a usage report:

1. Make sure you are on the **Usage Reports, Create a Usage Report** page. (If necessary, click the **Create a Usage Report** tab.)
2. If you have access to multiple accounts or branches, select the desired **Account** from the drop-down menu located above the tabs. (If there is only one account available, the **Account** is static text, rather than a drop-down list).
3. Select the desired **Report Type**. The **About this Report Type** area provides a summary of the currently selected report type.
4. Select your **Delivery Method**.
5. Depending on the Report Type and the Delivery Method, the remaining options will differ. Select the remaining features you want to see.
6. Click **Create Report**.

### Report Type

The **Report Type** drop-down list contains the available report types.

### Account

The **Account** drop-down list contains the clients (libraries, branches, etc.) defined in your ProQuest subscription contract, and their corresponding ID numbers. An account can have other accounts within it...each of which will have a unique corresponding ID.

The account ID number corresponds to internal database records at ProQuest CSA concerning your account. Refer to the account ID numbers when you contact ProQuest CSA about your account.

## Delivery Method

The Delivery Method option lets you select how you would like to receive your report. Depending on the method you select, the options at the bottom of the page will vary. The available methods are:

- **Display to screen as Web page** The report will display within 90 seconds.
- **Download now** The report can be downloaded immediately. You will need to enter the desired **Delivery Format**.
- **Email report now** The report will arrive by email within 24 hours. You will need to enter the **Email Address** where you want to receive the report.
- **Schedule report for periodic email delivery** The report will be delivered according to the **Scheduled Delivery Options** you select. You will need to enter the **Email Address** where you want to receive the report and enter the desired **Delivery Format**.

## Show items with zero usage

This option lets you control whether you want to view items that have not been used during the desired usage period. Check the box to view all items, including those that have not been used.

## Show detailed statistics breakout for each site in this multi-level account

This option lets you control whether you want to view the statistical breakout for each site in addition to account summary. Check the box to view the statistics for all sites. Leave the box unchecked if you want to view just the summary information for the account as a whole.

## Usage Period

Select the desired usage period. The options available here will vary, depending on the Report Type you select.

## Delivery Format

This option lets you control the format of the Usage Reports you download or schedule for email delivery.

- **Emailed Reports** are available as HTML files, '~' delimited files, or CSV files (which are Excel compatible).
- **Downloaded Reports** are available as either '~' delimited files, or CSV files (which are Excel compatible).
- **Scheduled Reports** are available as HTML files, '~' delimited files, or CSV files (which are Excel compatible).

## Email Address

You can enter any single email address, for example: name@domain.gov (You may only enter one email address.)

### Scheduled Delivery Options

This option lets you control when and how frequently the Usage Reports are emailed to you:

- Use the first drop-down box to select the day of the month you want to receive the report.
- Use the second drop-down box to select the frequency you want to receive the reports.
- Use the third drop-down box to set the month for the initial report.

## II. SCHEDULED REPORTS

To create your *first* scheduled usage report, use the **Create a Usage Report** tab as described above, or click on the button, **Create New Scheduled Report**.

*Note: The button will only appear if you have not created your first scheduled report.*

The Scheduled Reports page lets you:

- View your currently scheduled usage reports.
- **Edit a report.**
- **Delete a report.**

### Edit

To edit a report, click **Edit** in the Action column for the desired report. You will see the **Create Report** window displaying the information for the selected report. Make the desired changes and click **Create Report**.

### Delete

To delete a report, click **Delete** in the Action column for the report you want to delete. You will see a confirmation dialog asking if you are sure you want to delete the report. Click **OK**.