DELPHION

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Updated: Aug 17, 2005

Tracking Reporting for Group / Corporate Account Administrators

This Tracking Help page is for Group/Corporate Account Administrators. This page covers account reporting features and functions.

For help with overall account administration, please see: Tracking Help for Group/Corporate Account Administrators.

For a discussion of things Group/Corporate Account Administrators will want to consider before configuring Tracking for the first time see: Account Administrator Considerations for Configuring Tracking Functionality.

If you are an end user who is part of a group/corporate account, please see: Tracking Help for Group/ Corporate Account End Users.

If you are an individual Unlimited or Premier credit card subscriber or an individual using a free Basic registration, please see: Tracking Help for Individual Users.

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What to use Tracking Reporting for:
Tracking Reporting is useful to Account Administrators for documenting usage of Delphion in support of client chargebacks and interdepartmental expense allocations.

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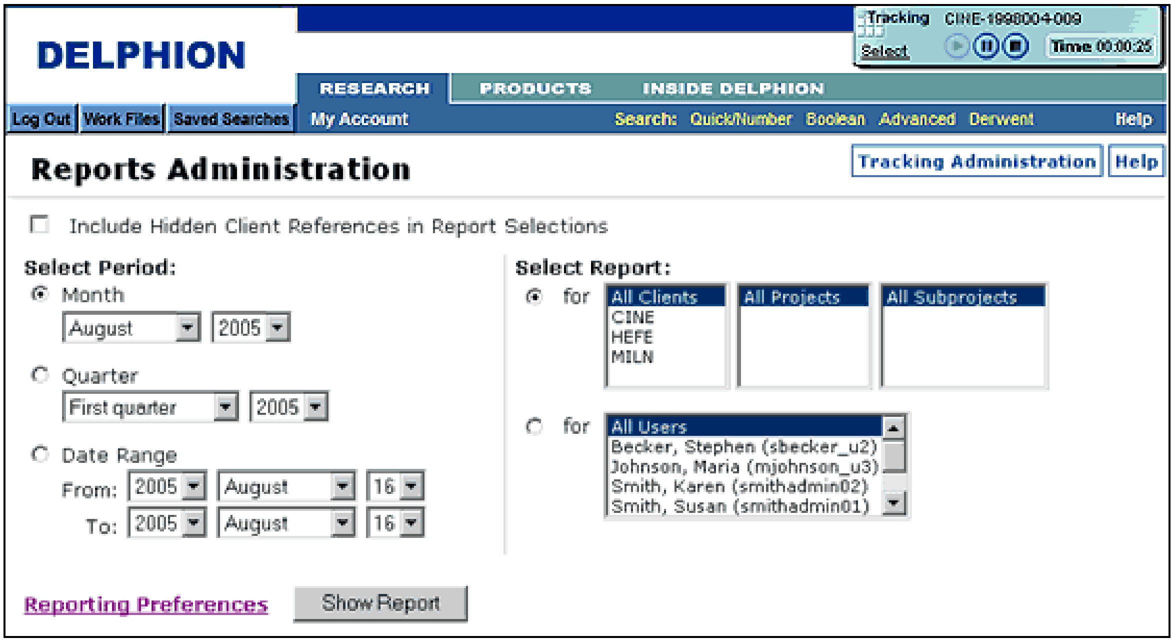
Reports Administration:
The Reports Administration page can be accessed from links on the Account Administration page and the Tracking Administration page. Only Account Administrators can access the Reports Administration page.

Reports can be created for:

- A specific period of time
- A specific Client/Project/Subproject or all Clients/Projects/Subprojects used on your account
- A specific user or all users on your account

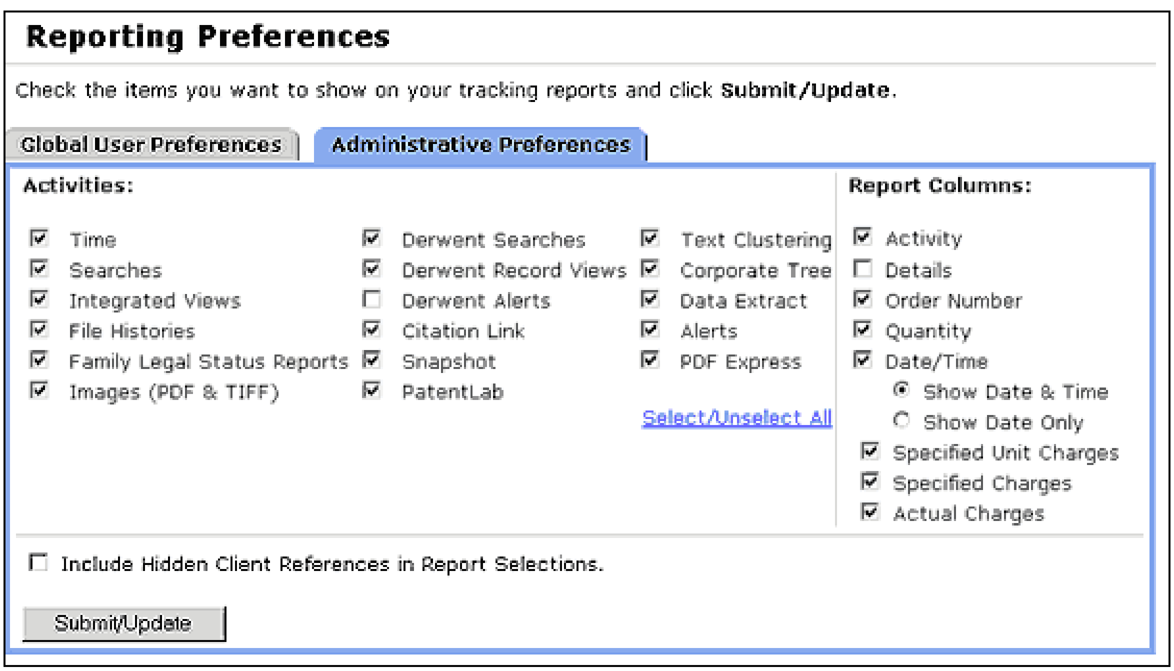
You can also choose to show actual charges, no charges or specified charges. Display of cost/ charge fields is controlled by Reporting Preferences which can be accessed from links on the Reports Administration page. These choices will only affect the display of reports and will not change the Select Billing Cost setting for the account on the Tracking Administration page.



End users have the ability to report on their own activities, but only Account Administrators can report on all users and all Client References. For details on end-user reporting options, see [Tracking Help for Group/Corporate Account End Users](#).

Hidden Client Reference
Check the **Include Client References in Report Selections** checkbox to enable reporting on Client References that have been hidden on the Tracking Administration page. This is useful when you have hidden a Client Reference because you do not want to allow users to select it, but you still need to report past activity on it.

Reporting Preferences
Set reporting options for end-user reports and for administrator reports on the **Global User Preferences** or the **Administrative Preferences** tab. For each item you have chosen to track, you can decide whether or not to show that item on user reports or on administrator reports. In order to show an item on any report, it must first be selected to be tracked on the Tracking Administration page. Otherwise, it will appear grayed out on the preferences tabs.



Report Columns
You can also choose which columns to show on reports:

- **Activity:** Identifies the type of activity the user conducted, such as Search, Data Extract, Derwent Record View or Image.

- **Details:** Provides specifics about the activity, such as the query string that was searched, which document was downloaded or the number of items analyzed (see details in chart below). If reports are being used as a search history on your account, you should include this column on the Global User Preferences tab.
- **Date/Time:** You can choose to include the full date and time stamp in reports, or limit the column to just the date, which may be best when exporting to a CSV format for use in other applications.
- **Client Charges:** Setting used to display cost/charge information on Global End User Reports. Charges displayed are based on the choice of actual costs, no costs or specified costs, as selected on the Tracking Administration page.
- **Specified Charges:** Charges calculated based upon values assigned by Administrators for any tracked activities within the Specified Cost Mapping screen. Specified Transaction Charges can be used to generate client billing reports. (available on Administrative Reports only)
- **Actual Charges:** Reports transactional costs that are incurred with use of Delphion per the terms of your company's Delphion subscription. Note that use of this option does not provide a direct means for recovery of subscription costs. (available on Administrative Reports only)
- **Quantity:** Number of units (defined within Specified Cost Mapping screen) incurred as part of an activity (e.g. a PDF Express delivery of 30 patents would have a quantity of 30).
- **Specified Unit Charge:** Displays values assigned for any tracked activities within the Specified Cost Mapping screen on a per unit basis. Specified Unit Charge can be used to generate client billing reports.
- **Order Number:** The Order Number to reconcile Tracking reports with invoices and statements.

Details for items that can tracked:

Activity	Description of Details	Can be Rerun?	Example
Search	Query string | # retrieved/# searched | collections searched	Yes	(coffee) | 4,442/3,356,197 |US Granted, US Applications
Integrated View	Publication number	Yes	US06501779
File History	Publication number	No	US06501779
Family Legal Status Report	Publication number | # of family members	Yes	US06501779 | 17 members
Image (PDF & TIFF)	Publication number (format)	Yes	US06501779 (PDF)
Derwent Search	Query string | # retrieved/# searched	Yes	(coffee AND caffeine) | 326/13,290,700
Derwent Record View	Accession number	Yes	1987-129101
Derwent Alert	# new results/# searched	Yes	32/13,290,700
Citation Link	Publication number analyzed	No	US05767460
Snapshot	# items analyzed | fields	No	100 items | Assignee, Attorney, Application Year
PatentLab	# items | fields	Yes	200 items | Biblio, Abstract
Text Clustering	# items analyzed | # clusters	No	100 items | 20 Clusters
Corporate Tree	Assignee | Query string	No	IBM | 88550 <in> assigneecode
Data Extract	# items | format | fields	Yes	20 items | CSV file | Publication Number,Title,Publication Date
Alerts	# new results/ # searched | collections searched	Yes	155 / 3,356,197 | US Granted
PDF Express	# requested | # downloaded | # not available	Yes	33 requested | 32 downloaded | 1 not available

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Reports:
Reports can be sorted by clicking any of the underlined column titles.

Each trail is shown on a separate line of the report, along with the items previously chosen to be included from the Report Preferences page. Click the hyperlinked date/time to view a specific trail.

To hide specific trails from a report, select the checkbox next to the desired trail(s) and click the Hide button at the bottom of the report. Hidden trails will not be included in any of the report formats. When trails are hidden, a Show button will appear at the bottom of the report. Click the Show button to show all hidden trails.

Report

Export to CSV file | Export to CSV file with Trail Details | Email This Report

☐	Date/Time	Client Reference	User Name	Total Time	Specified Charges	Actual Charges
☐	2004-09-22 10:47	CINE-1998002-sub003	Karen Smith	0:02:33	$ 0.00	$ 0.00
☐	2004-09-22 12:48	CINE-1998001-Phase 1	Susan Smith	0:30:00	$ 0.00	$ 0.00
☐	2004-09-23 11:17	CINE-1998004-008	barbara jones	0:09:51	$ 0.00	$ 0.00
☐	2004-09-23 11:27	CINE-1998003-008	Karen Smith	0:09:47	$ 0.00	$ 0.00
☐	2004-09-23 13:58	CINE-1998001-Phase 1	Susan Smith	0:16:36	$ 18.00	$ 18.00
☐	2004-09-27 6:55	CINE-1998004-Phase 1	Susan Wong	0:00:43	$ 0.00	$ 0.00
☐	2004-09-27 7:11	CINE-1998003-008	Karen Smith	0:02:34	$ 0.00	$ 0.00
☐	2004-09-27 7:14	HEFE-2003001-Phase 1	barbara jones	0:31:46	$ 16.00	$ 16.00
☐	2004-09-29 14:40	CINE-1998002-0929jelx	Susan Smith	0:39:52	$ 14.50	$ 10.00

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Trails:
A trail is a list of all of the activities tracked against a single Client Reference during a Delphion session. Sessions can have multiple trails, although only one trail can be active at a time. Depending on preferences set in Tracking Administration and Tracking Reporting, trails can include Details. Details provide specific information about each activity.

To hide specific activities from a report, select the checkbox next to the desired activity(s) and click the Hide button at the bottom of the report. Hidden activities will not be included in any of the report formats. When activities are hidden, a Show button will appear at the bottom of the report. Click the Show button to show all hidden activities.

Research Trail Return to Reporting

Client Reference: CINE-1998004-008e **User:** Jeff Morrow
Date: 2003-11-23 **Total Time:** 02:50:00 **Company:** Smith & Smith, LLP

Export to CSV File | Email this Trail | Hide Trail Details

☐	Activity	Details	Date/Time ▼	Client Charges
☐	Start Trail		2003-11-23 08:35:07AM	
☐	Search	(Coffee) | 4,442 / 3,356,197 | US Granted, US Applications	2003-11-23 08:52:07AM	
☐	Integrated View	US06501779	2003-11-23 08:53:07AM	
☐	Download Image	US06501779 (PDF)	2003-11-23 08:54:07AM	$3
☐	Snapshot	100 items | Assignee, Attorney, Application Year	2003-11-23 09:34:07AM	$15
☐	Text Clustering	100 items | 20 Clusters	2003-11-23 09:57:07AM	$15
☐	PatentLab	100 items | Biblio / Abstracts	2003-11-23 10:12:07AM	$15
☐	Integrated View	US05551212	2003-11-23 10:18:07AM	
☐	Family Legal Status	US05551212 | 17 members	2003-11-23 10:25:07AM	$7
☐	File History	US05551212	2003-11-23 10:37:07AM	$20
☐	Corporate Tree	IBM | 88550 <in> assigneecode	2003-11-23 10:39:07AM	$15
☐	Derwent Search	(text) | 403,476 / 181,240 | DWPI	2003-11-23 11:06:07AM	$4
☐	Derwent Record	2003-531459	2003-11-23 11:16:07AM	$6
☐	Pause Time Tracking		2003-11-23 11:18:07AM	
☐	Continue Time Tracking		2003-11-23 11:28:07AM	
☐	Search	(Coffee) | 4,442 / 3,356,197 | US Granted, US Applications	2003-11-23 11:30:07AM	
☐	End Trail		2003-11-23 11:35:07AM	
Hide selected	Show all hidden		Total:	$100

Printer-friendly version

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Formats:
Reports can be viewed in a printer-friendly format, downloaded in CSV (spreadsheet) format — with or without Details — or emailed in HTML format.

The CSV format includes one column for each of the columns shown on your report, plus the following additional columns:

- User
- Client Reference
- Trail ID (a unique identifier for each trail)
- Total Time (if time is being tracked for your account)
- Order Number (a unique identifier for a Delphion billable activity for use with invoice/ statement reconciliation)

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