6. Reporting

6.1. Scheduled sharing of data story snapshots

Language availability
Currently, snapshot scheduling is fully available in English only. This means that clients using Pure in languages other than English will see text related to this feature in English also when switched to another interface language. We apologize for this temporary inconvenience and are working on providing full availability of features in all supported languages.

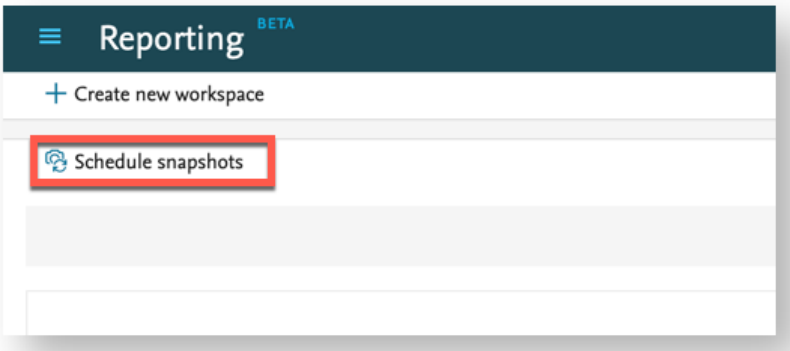
New term
A **data story snapshot** is a copy of a data story as it was in a given moment in time (when snapshot was taken). Data story snapshots are saved in Pure, and can be shared with other users.

This release brings one of the most sought-after additions to the reporting module: scheduled sharing of data stories.

You can now set up a schedule for sharing snapshots of data stories with named users. Pure will automatically create a data story snapshot at the time specified by you. The recipients (named users) will get a notification that a snapshot has been shared with them, and the link in the notification will bring them to the newly designed overview of data snapshots available to them. There, users can preview the shared data story and access older versions of the same data snapshot, which makes comparison between the snapshots really easy. They can also print/export data story snapshots to a PDF if this is required.

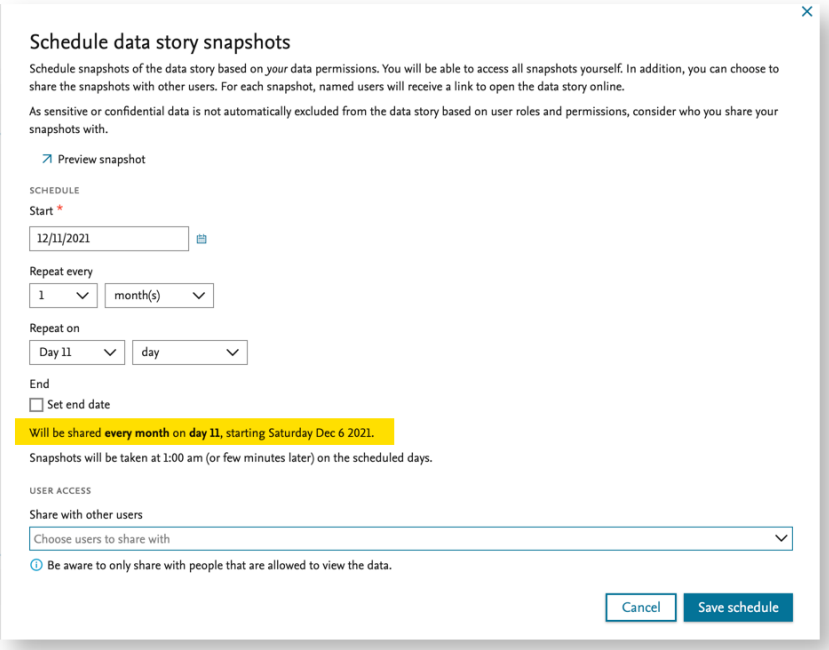
The snapshots are stored in Pure and you will be able to see who they are shared with, how often they are viewed, and by whom. This usage statistics can be useful when maintaining your shared workspaces. You will also be able to stop sharing specific versions of the data story, or all versions (if needed). Snapshot scheduling provides a lot of flexibility to configure the frequency, user access, and much more.

Click here for more details...

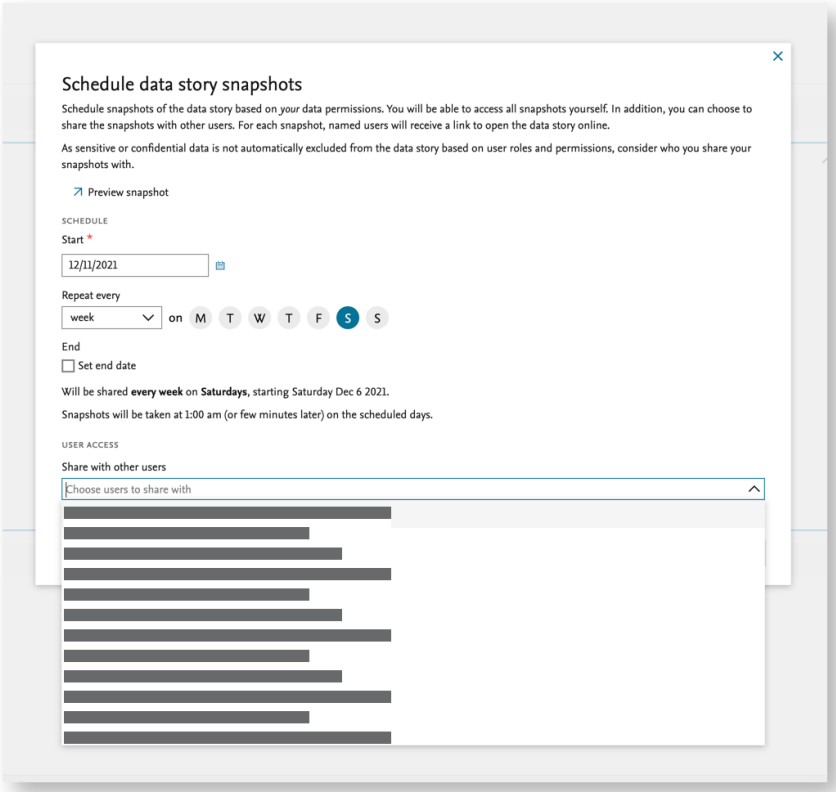
In order to schedule snapshots, you need to first create a data story and save your workspace.	
Select 'Schedule snapshot' to configure the schedule and specify which users should have access to the data snapshot.	

As there are many options related to the schedule, we have added an auto-generated text summary at the bottom of the screen to help you validate your schedule configuration (see screenshot).

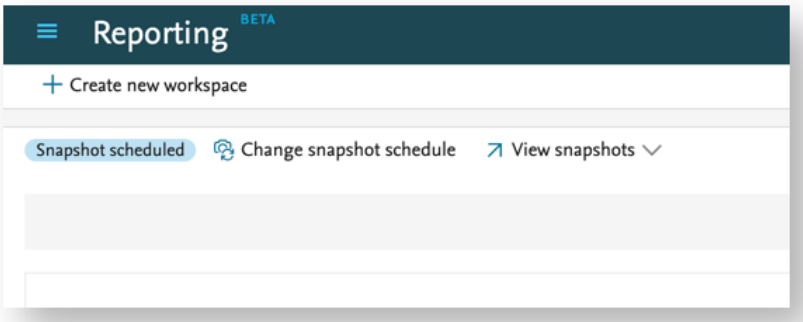
> The recipients of the data story snapshot will see exactly the same content as the owner of the workspace. All snapshots will be created in the context of the user owning the workspace.



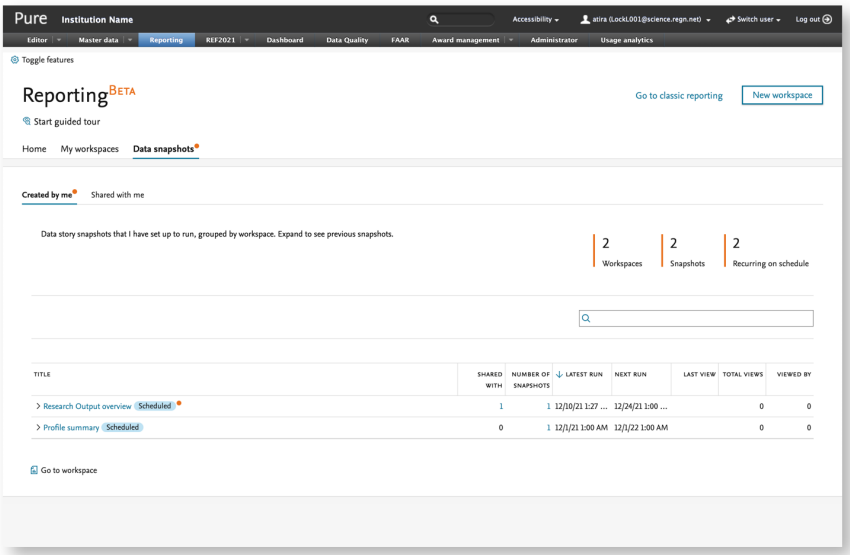
It is possible to specify which users should have access to the data story snapshot. It is also possible to see a preview of what the users will see when they access the snapshot.



If snapshots have been scheduled for a particular data story, it is indicated with a badge ('Snapshot scheduled'). It is possible to change the schedule, and to view and compare all previous snapshots on the new data story overview page.

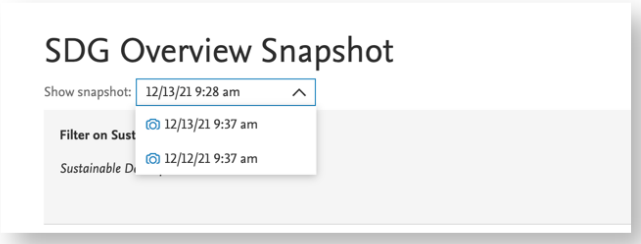


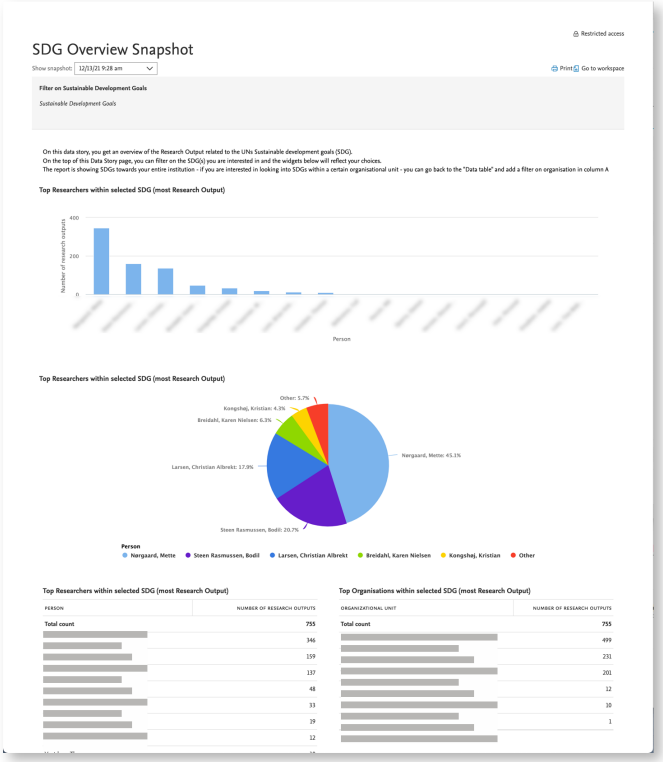
The new overview page shows all scheduled workspaces with information about who they were shared with, how often they have been viewed, and by whom. This is useful feedback to consider when managing workspaces and can help decide which ones to rework or remove.



Together with the data story snapshots, we have introduced a new preview mode for the data stories. You can quickly preview the data story when scheduling a snapshot share: this lets you see exactly what the recipients of the snapshots will see.
When there are already multiple snapshots available for a given data story, you can pick a particular snapshot from the dropdown list to preview it.

Data stories are now also formatted and easy to print to PDF. You can print the data story from both the preview and the traditional data story view.



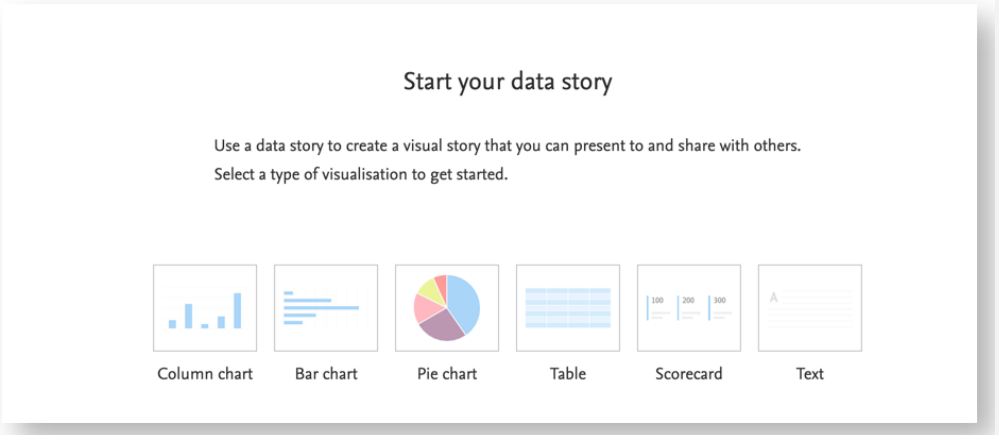


Back to top of page

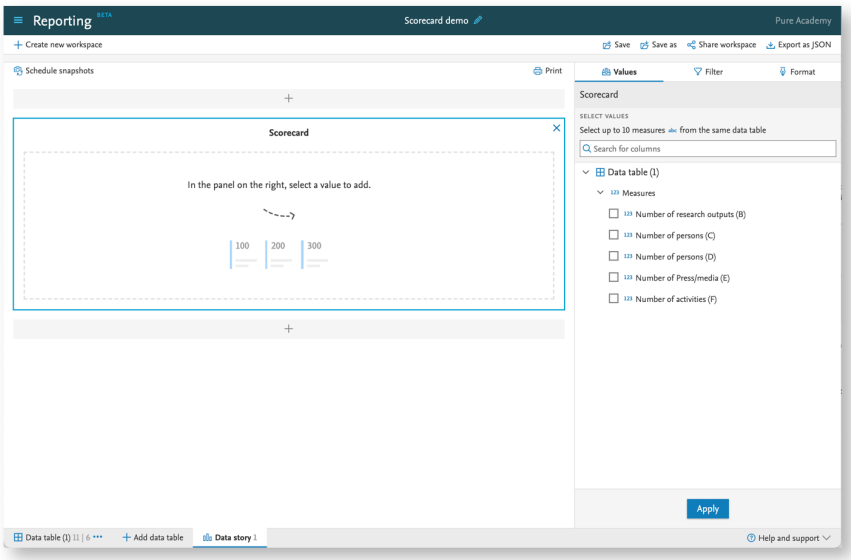
6.2. Scorecard: a new data story widget

We have introduced a new widget for the data story which we call the Scorecard. The Scorecard lets you easily draw attention to key figures in your data story. We use this widget in Pure itself, for example in the Personal user overview page. With this release, you are now able to create this widget yourself.

Click here for more details...

To use the new Scorecard widget, just select it when adding new widget to the data story.	

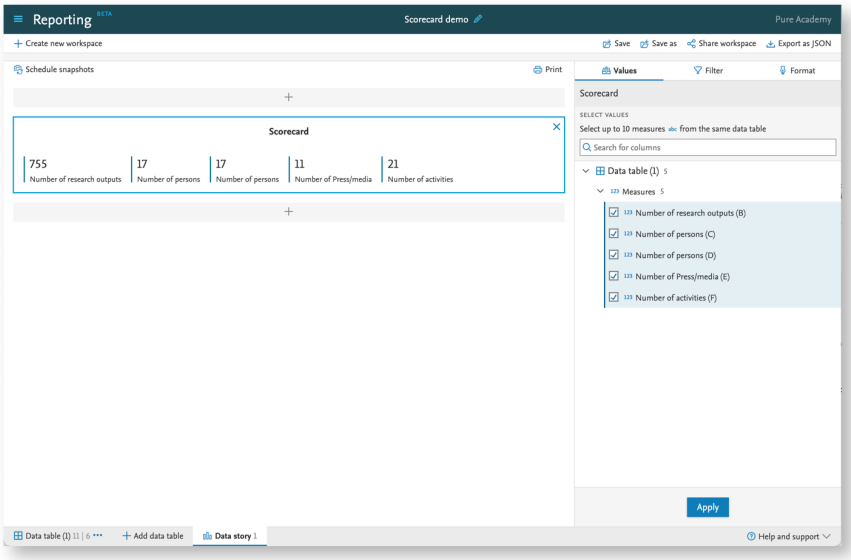
When the Scorecard is added to the data story, you can select which measures should be included.



> You cannot select measures from different data tables.

After selecting the key measures, just click 'Apply'.

To remove measures from the Scorecard, just deselect the measures and click 'Apply'.



Back to top of page

6.3. Reporting on more fields

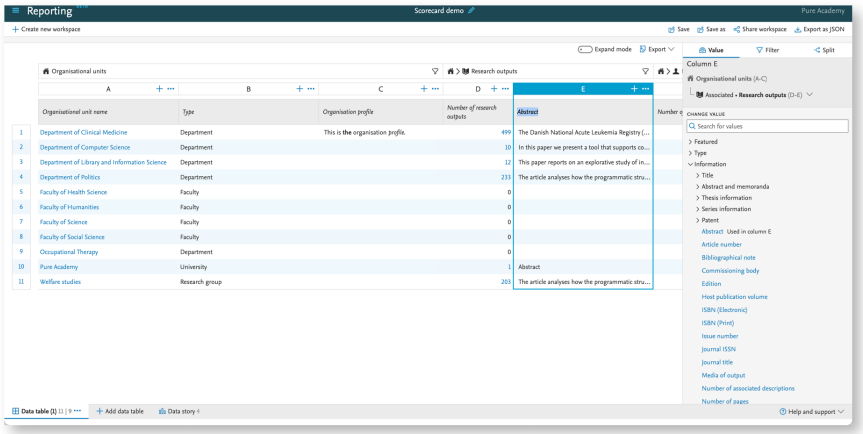
We have been working on adding more values to the reporting module, and with this release we have added the option to use fields which can contain markup, such as 'Organization profile' and 'Abstract' on research outputs. If the field contains markup, this will be shown in the reporting module.

Click here for more details...

You will find the new fields when adding columns to the data table. In this example, 'Organization profile' and 'Abstract' have been added to the data table.

We will show as much of the fields as we can, based on the available space on the page. Once you export to either Excel or CSV, the entire field will be exported.

> Any markup that might be present in these fields will now also be shown in the reporting module. This can lead to some odd-looking data tables, as we are showing all contents in one line. In the table widget we do show any new lines as well, but if there is a lot of text with embedded tables, etc., this can still look odd.

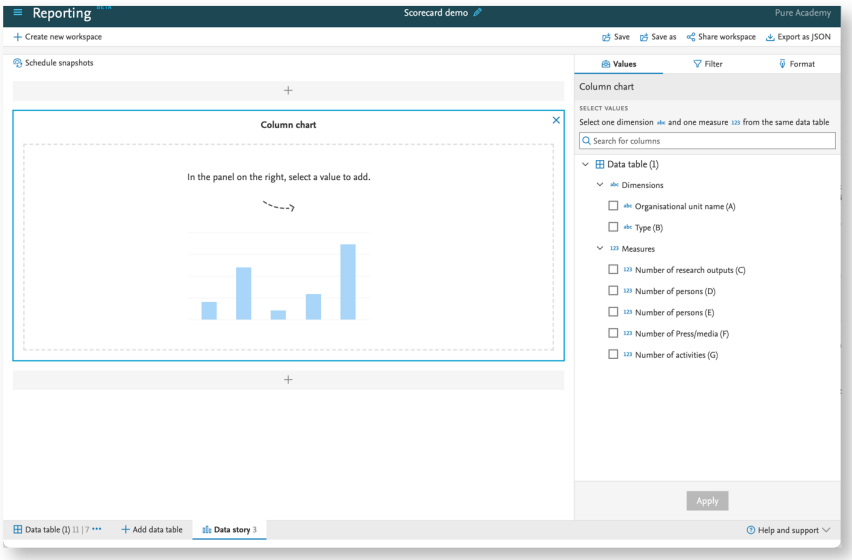
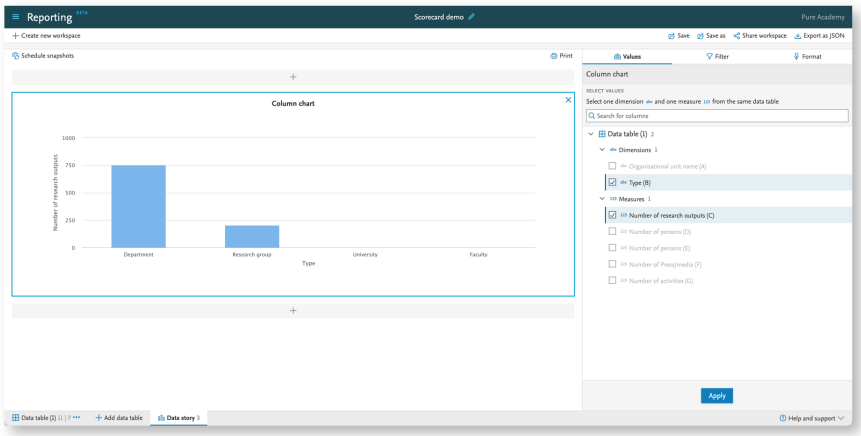


Back to top of page

6.4. New way of selecting data for widgets in the data story

It is now easier to add measures and dimensions to the data story. This new, streamlined way of selecting the values will be available throughout the reporting module, with updates to other areas planned in subsequent releases of Pure.

Click here for more details...

When adding values to a widget, you will now see the same controls as in the Scorecard.	
After selecting the needed dimension and measure for the selected widget, just click the 'Apply' button.	

Back to top of page

6.5. Filter content based on a list of IDs

Do you have a specific list of Pure IDs or UUIDs that you need to filter to in the reporting module? With this release you can. (See also section 5.2 Export of search results available and configurable)

Click here for more details...

To filter values based on a list of IDs, you just need to paste the list of IDs in the search bar available for that filter (here, Organizational unit).
Note: The list can only be used in filters where you can search for content.

To use the list, it *must* follow this format: ^ID1,ID2.
Start with a circumflex/caret, then enter Pure ID or UUID. Each ID must be separated by a comma:

Example

```
^0fb956f6-863e-47c0-9b10-cfad2c3b9089,014446f0-e731-49bd-a0b6-0cfb3b30acd7
```

After adding the string in the search box, you will see the IDs that Pure was able to find, and you can then select some, or all of them.

Pure only support 2,000 IDs in one string.