7. Reporting

7.1. Data table: column expand replaces global expand

The column expand option allows you to expand specific columns rather than the whole table in order to create a neater, more focused overview of your data.

Available documentation
Pure Manual > Reporting Module (Beta) > Data tables > Expand and split

Click here for more details...

Background
For some time now, Reporting supported the option to expand the view for cells that contained multiple values in order to expose more detailed information, such as all authors of a publication. The global expand, however, considerably increased the table length as it expanded all possible lists in the data table. The introduction of the more exact column expand offers you more granular control over the data you want to present.

Any saved workspace that used the global expand mode will retain that setting. It is possible to change those saved workspaces by disabling the global expand, its option will then disappear, and then apply expand on the columns that should be expanded.

Feature details

<table>
<thead>
<tr>
<th>Default view: a non-expanded column, listing first item and indication of additional items in the cell.</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Column Expand Example" /></td>
</tr>
</tbody>
</table>
Expanded view: To expand a column click on the menu (...) in the header of the column that should be expanded, and select the 'Expand' option.

Once the column is expanded, a small icon appears to the left of the column name.

7.2. Data story: new 'List' widget

The 'List' widget lets you create either a bullet list, or a numbered list, and with that further enrich the narrative of your data story. The order of the items on the list will follow the order in which the information is listed in its source data table.

Tip: The 'List' widget can be used to, for example, give a clear overview of an author's publications especially if this is combined with your favorite citation format.
In the Data story tab of your workspace, select 'List' from the available visualizations.

In the 'Format' tab in the right-hand panel, you can choose between two different types of lists:

- bullet list
- numbered list

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7.3. Data story: Rich text support added to 'Text' widget

The 'Text' widget now supports Markdown, making it really easy and fast to create a well-formatted and clean text.

Tip: The 'Text' widget can be used, for example, in an introduction to the data story, to give readers the background and set their expectations for your data story.

Click here for more details...

We currently support:

- two levels of headers
- bold
- italic
- numbered lists
- bullet lists

You can apply the formats by either:

- selecting formatting options from the visual menu
- using Markdown directly in the widget
**7.4. Reporting on Research output contributors**

To make reporting on relations between content easier, we are introducing a new reportable type: 'Research output contributors', which can be used either as the driver content type for your report, or added as content related other content, such as Research outputs, or Persons.

When you select 'Research output contributors', Pure will add a number of relevant columns with Person's names, roles, organizational units, and more, the number of columns depends on whether the type is selected as a driver content type, or as a relation to other content.

You can apply various filters to the column group to get to the exact data you need for your report.

Tip: One of the sought-after details provided as part of the 'Research output contributors' reporting type is **List index**. By combining the new 'Column expand' function with **List index** and **Contributor type** filters, you can easily narrow down your Authors to first contributors only.
Background

Pure holds a lot of valuable information about relations between content: for example, between Persons and Research outputs, or between Research outputs and Publishers. In the context of reporting, these relations can pose a challenge: sometimes we may not be sure if the details we want to include are stored within the Person, or the Research output record. By introducing the 'Research output contributors' reportable type, we are bringing together the relevant details that might be stored deeper in, or are simply just related to, Research outputs and Persons.

Feature details

It is possible to select the new 'Research output contributors' type as your driver content type.

If 'Research output contributors' is added as the driver content type, Pure will automatically add a number of columns with related data. You can remove the columns you don't need.
There are a lot of different filters available for Research output contributor reporting. Using filters is really powerful in this context: for example, filtering on the Contributor type makes it possible to list all of the internal or external contributors.

7.5. Reporting on Affiliations

Another new reporting type now available is Affiliations: it allows you to easily create reports on specific staff/student affiliations, for example on all current staff that belongs to a specific organization unit.

When you add ‘Affiliations’ to your report, Pure will add a number of relevant columns, which you can later choose to remove. The columns may contain, for example, attendance status, award date, or start year in the case of students.

Click here for more details...
You can select the Affiliation type as your driver content type.

It is also possible to select it when adding relations to Persons.
When you add ‘Affiliations’ to your report, Pure will add a number of relevant columns, which you can later choose to remove.

There are a lot of different filters available for Affiliation reporting. Using filters is really powerful in this context: for example filtering on the Staff type makes it possible to list all staff of a particular type. Combined with an Organizational unit filter, it will produce a list of all staff of a particular type, affiliated with a particular organizational unit.

7.6. Improved reporting on metrics: expanded h-index

We have introduced a new way of reporting on metrics, starting with the expanded options for h-indices (also introduced in this release - see h-index metrics release notes section). The goal of this new approach, which will be implemented for all metrics in Pure over the coming releases, is to ensure that the wide variety of metrics supported in Pure will always be easy to report on, and your system’s performance will not be negatively affected.
Click here for more details...

With h-index enabled (see h-index metrics release notes section for instructions), users with appropriate rights can now report on the h-index by time period and source. The h-index is a Person-level metric and the instructions below provide an overview from this perspective.

### Creating a new report on Persons and h-index

Create a new workspace and select **Person** content type as your driver content type.

#### Add h-index as a relation to the Person:

Select the **Content related to Persons** option, and add **Persons metrics > Associated** from the dropdown menu.

![Diagram of creating a new workspace](https://doc.pure.elsevier.com/pages/viewpage.action?pageId=...)

**Editor**
- Research outputs
- Research output contributors
- Activities
- Prizes
- Press/Media

**Master data**
- Users
- Affiliations
- Person supervisions
- Organisational units

**Additional**
- Research output content
- Person supervisions
- Affiliations

New Column
- Persons (A)

**Select value on related content**
- Details for Persons
- Content related to Persons
- Supervised by
- Supervisor for
- Co-contributors (research output)

**Organisational units**
- Affiliations
  - Primary affiliations
  - Current affiliations
  - Former affiliations

**External persons**
- External co-contributors (research outputs)

**External organisations**
- Affiliations

**Users**
- Associated

**Person metrics**
- Associated
The h-index of each source and time range specified in the h-index configuration is shown for each Person.

Apply column expand (see column expand feature release notes section) to show all h-index values.
To show the individual citation sources for each h-index:

1. Add a new column using the Add column button.
2. Select the Information > Source category from the dropdown menu.
3. You can also show the explicit time range by selecting Category in the same dropdown.

Filtering on h-index sources and time ranges

You can also filter data in the metrics-related columns selecting the Filter option in the sidebar, or the Filter icon above the column(s). Clicking Add filter brings up
the available filter options for the columns.

For metric name/time ranges, select the **Selected metrics** option from the **Featured** category dropdown.

For metric source, select **h-index source** option from the **Metrics > h-index** category dropdown.
In the scenario provided in the screenshot, the time range has been limited to 10 years (via the Selected metrics filter) and to Scopus as a citation source (via the h-index source filter).

7.7. Template-level reporting

This update was released as part of 5.23.2

You can now use the ‘Parent type’ values in reporting. This allows you to easily add information about the parent template of a particular content item to your data table. ‘Parent type’ can be used as values, as a filter, in splits, and in the data story.

Click here for more details...

You can select the parent type in the date table to create the workspaces that you need to get information on this level.
You can also use the parent type in splits, to easily create workspaces that provide an overview, for instance, on the organizational level.

You can combine the parent type in the data story with split option to create the narrative you need based on the template level.

### 7.8. Performance improvements

We are continuously improving the performance of the Reporting module. In this release, we introduced data cache for data story, which means we do not need to fetch data every time you switch between the different modes of work on the data story (printing, editing, etc.).