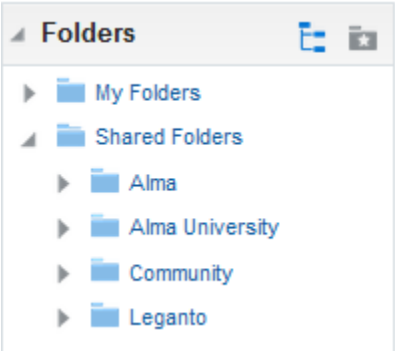
Overview and Introduction

Exercises for Attendees

1. Accessing Analytics
    a. Log in to Alma.
    b. On **Analytics** menu, at the bottom, find the dates of **Data Available** and **Data Updated**.
    c. Click **Access Analytics** (if you activated the new Analytics interface) or **Design Analytics** (if you are still using the old interface).

2. Folder Structure in Oracle (Alma) Analytics
    a. Click **Catalog** in top menu.
    b. Explore the Folders available on the left side:
        i. My Folders = A read / write personal folder accessible only to the logged in user.
        ii. Alma, Leganto, etc. = Read-only folders containing out-of-the-box reports produced by Ex Libris.
        iii. [Name of Institution] = A folder which is read / write and visible to anyone in the institution who has “Designs Analytics” role (and can thus click the “Design Analytics” entry in the Alma menu)
        iv. Community = A read / write folder visible and accessible to save and copy reports for all institutions. Includes reports and dashboards of all the institutions with Ex Libris Analytics in the world. It contains only queries (no data of other institutions is visible).



    c. In the above situation, the name of the institution is "Alma University." In your Catalog, that folder will instead have the name of your institution.

3. Dashboards
    a. View sample Dashboards in the Alma folder, such as:
        i. Shared Folders/Alma/Fulfillment/Dashboards > Fulfillment Loans Returns and Overdue Dashboard
        ii. Shared Folders/Alma/Acquisitions/Dashboards > Acquisitions Dashboard
        iii. Shared Folders/Alma/Inventory/Dashboards > Physical Items
    b. Notice that, typically, one folder has three subfolders:
        i. Dashboards
        ii. Reports
        iii. Prompts
        iv. For example, under “/shared/Alma/Acquisitions”:
        v. For example, under “/shared/Alma/Fulfillment”:
    c. Click “edit” on one of the reports and see that if you try to save it to the Alma folder you cannot (because that folder is “read only”)
        i. Save it to the folder of the institution.

4. Create an Analytics Report
    a. On the top menu, click **Create**
    b. Select **Analysis**
    c. Select Subject Area: **Users**
    d. From the **Subject Areas** on the left, find and drag the following into the **Selected Columns** field:
        i. User Measures > Number of Users
        ii. User Details > User Group
    e. Switch to **Results** tab
    f. Adjust report as needed, then **Save** the report to the institution's folder.