




Useful Tips in Analytics

Exercises for Attendees

Save a Customized Analytics Column

1. In Alma, select menu Analytics > **Access Analytics**
2. Open the **Catalog**
3. Navigate to **Shared Folders / [your institution] / Functions Training**
4. Edit report **Physical Items with Concatenated Barcode Rows**
5. Switch to **Criteria** tab
6. On Barcode(s) column: **Save Column As ...**
7. Name the column: **Barcodes Concatenated**
8. Save to **Shared Folders / [your institution] / Subject Area Contents / Physical Items**
9. **Create** a new **Analysis** with Subject Area = **Physical Items**
10. In the bottom-left corner, in the Catalog, open: **Shared Folders > [your institution] > Subject Area Contents > Physical Items**
11. Drag **Barcodes Concatenated** into Selected Columns area.
12. **Edit formula** – You can't change the formula, because it's locked to the saved column in the catalog. However, you can copy it, if you want to paste it into a different column and make some changes.

Add a Logo to the Top of a Report

1. Open the **Catalog**
2. Navigate to **Shared Folders / [your institution]**
3. Create New Folder : **Images**
4. In the Folders pane, highlight the Images folder
5. In the Tasks pane: Upload
6. Browse to the logo on your computer (or wherever it is)
7. **OK**
8. On the More menu: **Properties**
9. Copy the **Name** and the **Location**
 - a. /shared/[your institution]/Images/Alma University Logo.png
10. Navigate to **Shared Folders / [your institution]**

11. Edit report: **Item Count by Library and Location**
12. Edit the **Title** block
13. Checkbox: **Logo**
14. Custom Image: **cmap:/shared/[your institution]/Images/Alma University Logo.png**
15. **OK**; and **Done**

Use Report Output as Input for Another Report


First, create the report that will become the input for the second report:

1. **Create** new **Analysis** where Subject Area = **Physical Items**
2. Add Columns:
 - a. PO Line > **PO Line Reference**
 - b. Physical Item Details > **Barcode**
3. Add New Filter:
 - a. PO Line Creation Date > **PO Line Creation Date Filter = Previous Complete Two Years**
4. Save Report: **Shared Folders / [your institution] / PO Line and Barcode**

Next, create the second report, which will reference the first.

5. **Create** new **Analysis** with Subject Area = **Fulfillment**
6. Add Columns:
 - a. Physical Item Details > **Barcode**
 - b. Borrower Details > **User Group**
 - c. Loan > **Loans (Not in House)**
7. Filter on above column **Loans (Not in House) >= 1**
8. New Filter on **Barcode: Is based on results of another analysis**
 - a. Browse to **Shared Folders / [your institution] / PO Line and Barcode**
 - b. Relationship: **is equal to any**
 - c. Use values in Column: **Barcode**
 - d. **OK**
9. View **Results** tab
10. Save the report: **Shared Folders / [your institution] / Loans per User Group for PO Lines in Previous 2 Years**
11. Don't close this report; use it for the next one.

Create Alma Set from a Report


1. In OBI, stay in the **Loans per User Group... report**
2. Export  to **Data > Excel**
3. **Open** the exported file in Excel
4. Switch to **Alma**
5. Alma menu **Admin > Manage Sets**

6. **Add Set > Itemized**
7. Set name: **Barcodes of Loaned Items from PO Lines in Previous Two Years**
8. Set content type: **Physical items**

You could import the Excel file into the Alma set. Or to import directly from Analytics:

9. Add Contents ... **From Analytics**
 - a. This can take a while for the Alma API to make the connection with the Oracle analytics system.
10. Analytic Folder: **[your institution]**
11. Name: **Loans per User Group for PO Lines in Previous 2 Years**
12. **Save**
13. Alma menu **Admin > Monitor Jobs**
14. Either **Running** tab or **History** tab, find recent job called **Add Members to Set**
15. Click name of Job to see results
16. Alma menu **Admin > Manage Sets**
17. Find set called "**Barcodes of Loaned Items ...**"
18. Row-action: **Members**


Customize No-Results Message

1. In Alma Design Analytics: **Create** a new **Analysis** with Subject Area = **Fulfillment**
2. Add Columns:
 - a. Bibliographic Details > **Title**
 - b. Loan Details > **Barcode**
 - c. Loan > **Loans (Not In House)**
3. Add Filters on above:
 - a. Loans (Not in House) > **1**
4. New Filter:
 - a. Loan Date > **Loan Date Filter = Last 3 Months**
5. View **Results** tab
6. Switch back to **Criteria** tab
7. Edit Filter: Loans (Not in House) > **5** (or 10, or whatever number of times no item has been loaned in the last 3 months)
8. Save Report: **Shared Folders / [your institution] / More than 5 loans in last 3 months**
9. View **Results** tab. No results! But the message is a bit generic.
10. Switch back to **Criteria** tab
11. **Edit Analysis Properties** 
12. On Results Display tab, change No Results Settings = **Display Custom Message**
13. Header (this will be in red, bold font): "**No results for this query.**"
14. Change message (can have HTML tags): "**There are no items with more than 5 loans in the last 3 months.**"
15. Check the box **Contains HTML ...**
16. **OK**
17. View **Results** tab to see customized No Results message.

Concatenate Two or More Fields

1. **Create** a new **Analysis** with Subject Area = **Physical Items**
2. Add Columns:
 - a. Physical Item Details > **Barcode**
 - b. Bibliographic Details > **Creation Date**
 - c. Location > **Library Code**
 - d. Physical Item Details > **Physical Item ID**
3. Add Filter on above:
 - a. Bibliographic Details > **Creation Date** >= 01/01/2022
4. New Filter:
 - a. Physical Item Details > **Lifecycle** = **Active**
5. View **Results** tab
6. Save report: **Shared Folders / [your institution] / Example of Column Concatenation**

You can combine the last two columns, so the Library Code and the Item ID are in the same column :

7. Switch back to **Criteria** tab
8. Physical Item ID field: **Edit formula**
9. Copy the Column Formula from here ("**Physical Item Details**". "**Physical Item Id**")
10. **Cancel**
11. Library Code field – Edit formula
12. In the Column Formula field, after the first code, add a double-pipe  (from the tools on the bottom), and then paste in the other formula.
13. **OK**
14. Delete the **Item ID** column
15. Show **Results** tab.

You may want to slightly change how it looks:

16. Switch back to **Criteria** tab
17. Library Code || Physical Item ID field: **Edit formula**
18. Change the Column Formula: "**Location**". "**Library Code**" || '-' || "**Physical Item Details**". "**Item Id**"
19. Checkbox **Custom Headings** and change to "**Library Code and Item ID**"
20. **OK**
21. View **Results** tab
22. **Save** report

Conditionally Change Text Format

1. **Create** a new **Analysis** with Subject Area = **Funds Expenditure**

2. Add Columns:
 - a. Invoice Line > **Invoice-Number**
 - b. PO Line > **Invoice Status**
3. Add Filter on above:
 - a. Invoice Line > **Invoice-Number is not null**
4. New Filter:
 - a. PO Line Creation Date > **PO Line Creation Date Filter = Last 365 Days**
5. View **Results** tab
6. Save report: **Shared Folders / [your institution] / Status of Invoices in Last 365 Days**

To highlight the Partially Invoiced entries so they stand out:

7. Switch back to **Criteria** tab
8. On Invoice Status column: **Column Properties**
9. Switch to tab **Conditional Format**
10. Add Condition: **Invoice Status = Partially Invoiced**
11. **OK**
12. On Edit Format
 - a. Font Color = Red (#FF0000)
 - b. Style = Bold
13. **OK**
14. **OK**
15. View **Results** tab
16. **Save** report