

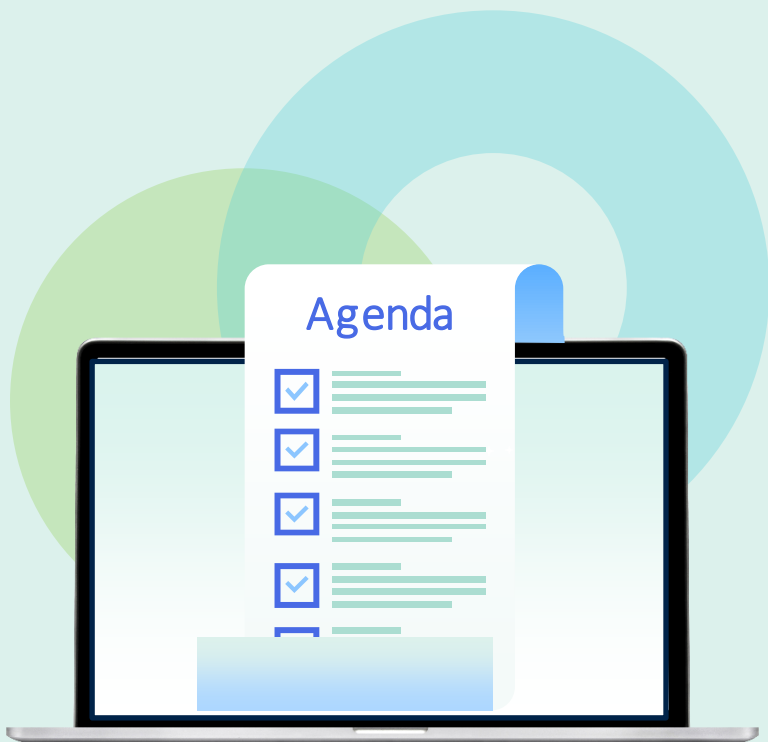


## Session 8: Useful Tips in Analytics

# Analytics Master Class Sessions

Session	Subject	Date
<del>1</del>	<del>Overview and Introduction</del>	<del>Feb. 16</del>
<del>2</del>	<del>Physical Inventory and Fulfillment</del>	<del>Feb. 23</del>
<del>3</del>	<del>Electronic Inventory, Usage, and Acquisitions</del>	<del>Mar. 2</del>
<del>4</del>	<del>Creating and Managing Dashboards</del>	<del>Mar. 9</del>
<del>5</del>	<del>Creating and Managing Prompts</del>	<del>Mar. 16</del>
<del>6</del>	<del>Filters and Functions</del>	<del>Mar. 23</del>
<del>7</del>	<del>Analytics Objects</del>	<del>Mar. 30</del>
<b>8</b>	<b>Useful Tips</b>	<b>Apr. 6</b>



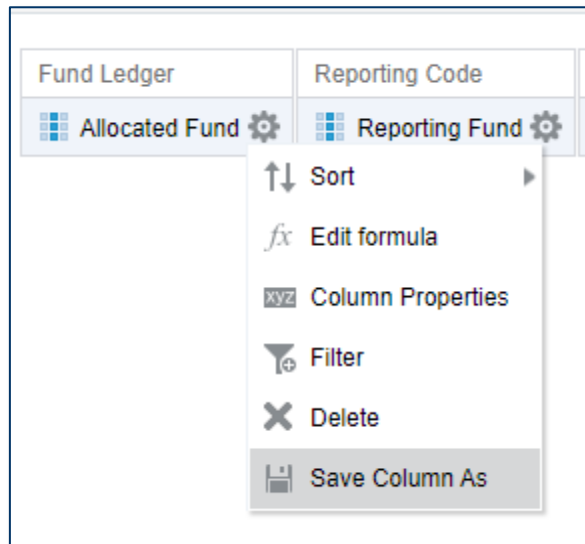


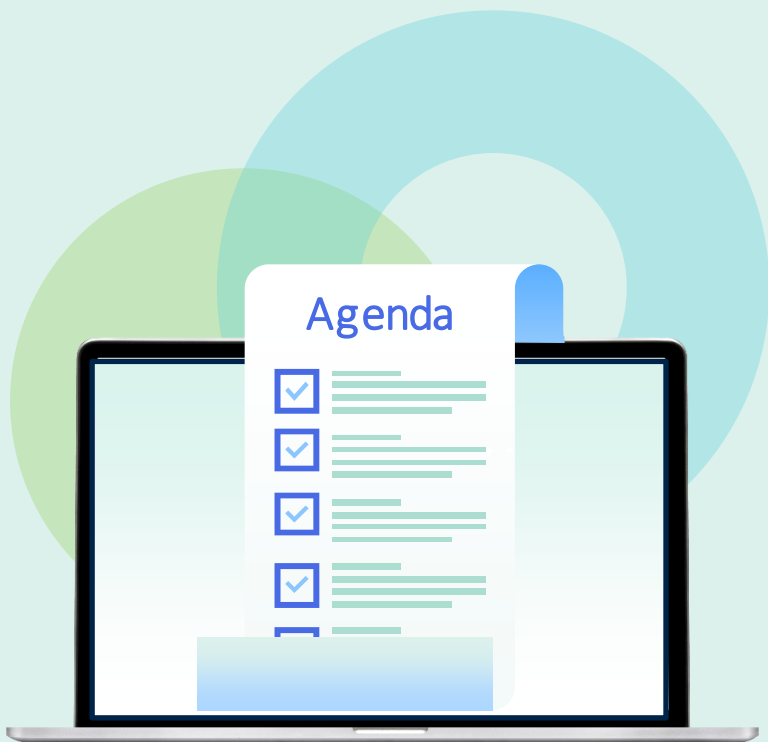
- **Save a Customized Analytics Column**
- Add A Logo To The Top Of A Report
- Use Report Output As Input For Another Report
- Create Alma Set From A Report
- Customize No-results Message
- Concatenate Two Or More Fields
- Conditionally Change Text Format
- Get More Help: Open A Case!
- **Time Permitting: Open Forum**

# Save a Customized Analytics Column

**Problem:** We want to re-use an edited field in other Analytics reports

**Solution:**  
“Save Column As”  
into a folder



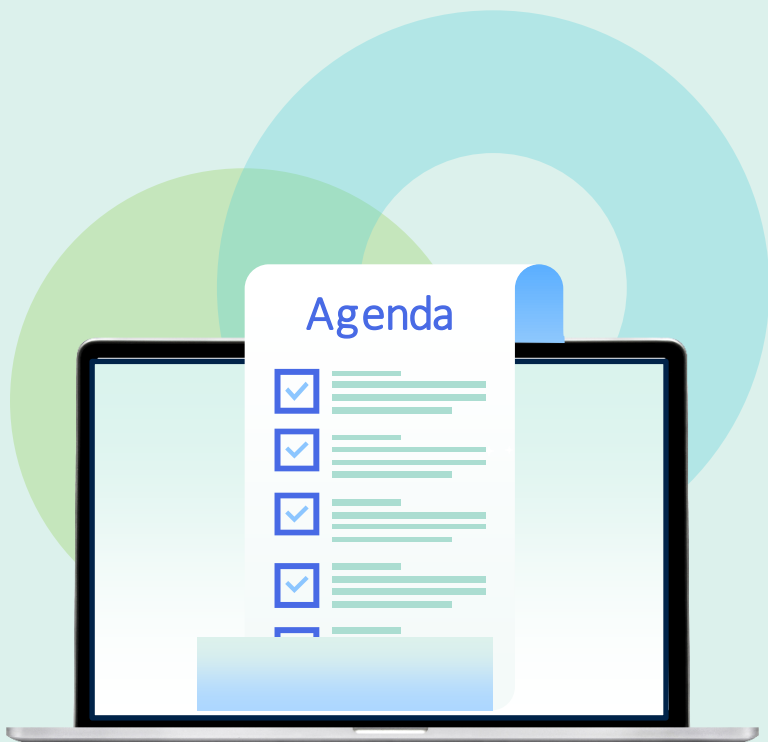


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# Add a Logo to the Top of a Report

**Solution:** Edit the title and add the URL for the logo file

A screenshot of a web interface titled "Title". It features a toolbar with icons for print, share, download, and other actions. Below the toolbar, there is a "Title" input field with a small icon to its right. A checkbox labeled "Display Saved Name" is checked. Below this, there is a "Logo" checkbox, an empty input field, and a "Select Image" button. A red rectangle highlights the "Logo" checkbox, the input field, and the "Select Image" button. Below these elements, there is a note: "Optional - URL of a title image. Note: When running in a secured environment, only". At the bottom, there is a "Subtitle" input field and a "Started Time" dropdown menu set to "Do not display".

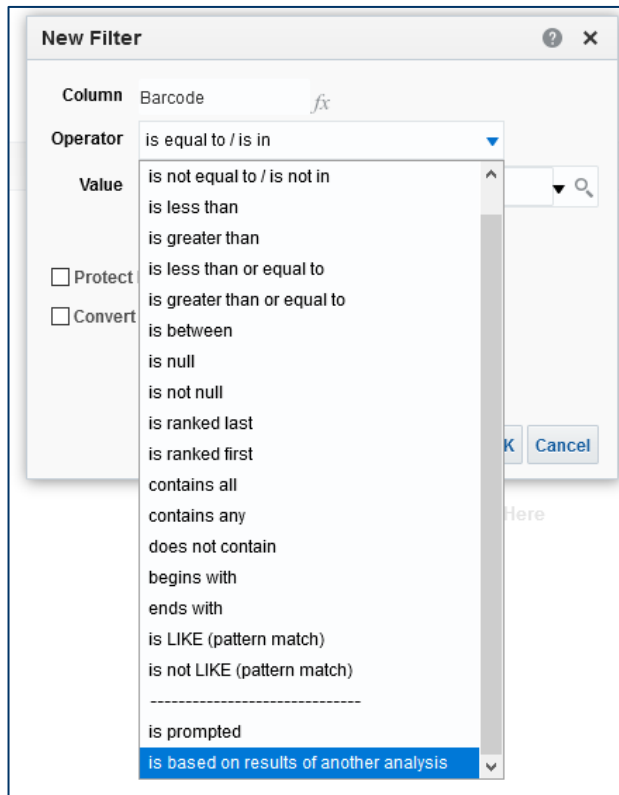


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# Use Report Output as Input for Another Report

**Problem:** Report needs fields from two subject areas

**Solution:** Create two reports. In the second, use operator “is based on results of another analysis”





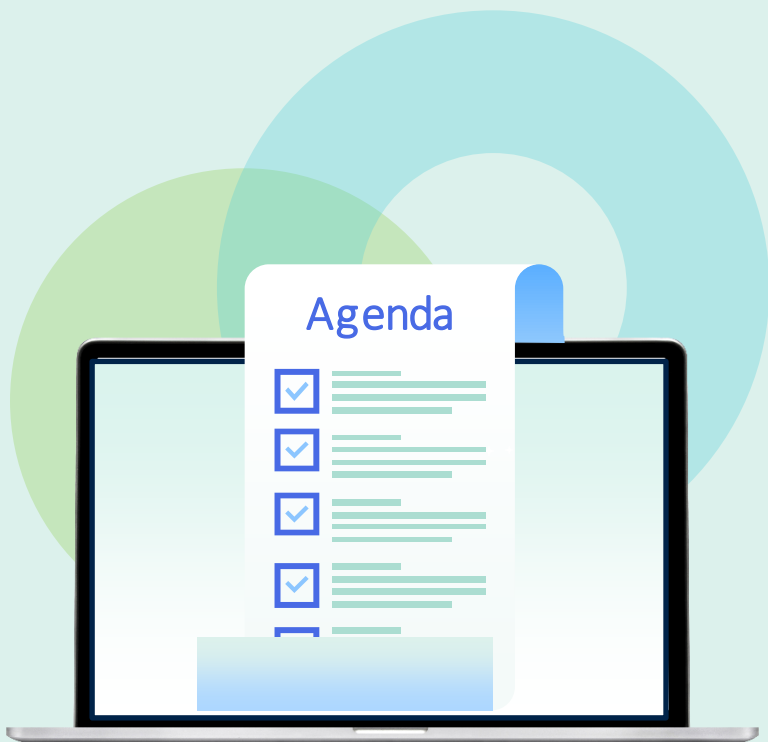
# Use Report Output as Input for Another Report

## Example for today:

We want a report showing:

1. **Barcodes** of all Purchase Order Lines (POLs) created in the last 2 years (**Physical Items**)
2. **Number of Loans** for each of those Barcodes (**Physical Items**)
  - **Per User Group** (**Fulfillment**)





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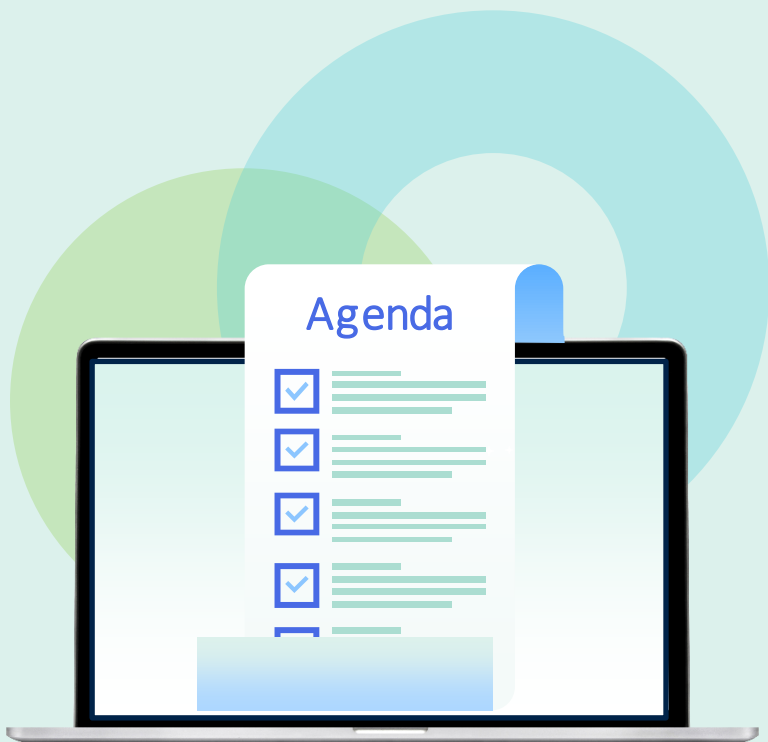
# Create Alma Set from a Report

**Problem:** Need a Set made from Analytics results

**Solution 1:** Export analytics results to Excel file, then upload that file into an Alma set.

**Solution 2:** In Alma Set-creation, “Add contents from Analytics”

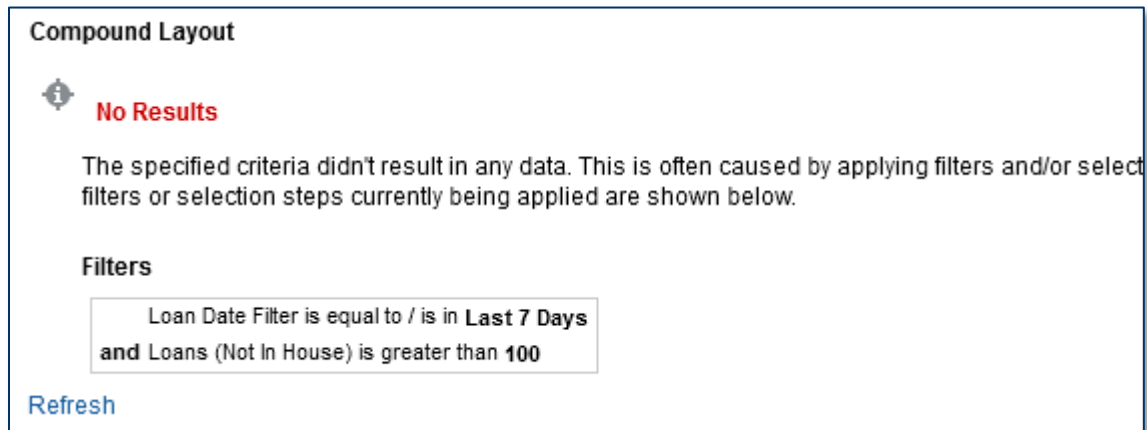




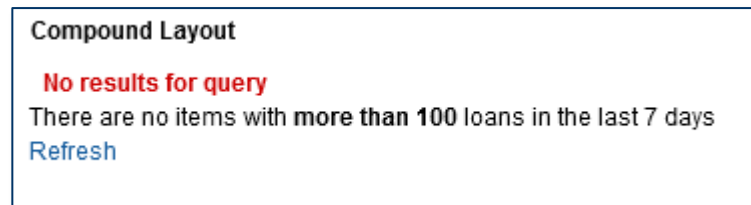
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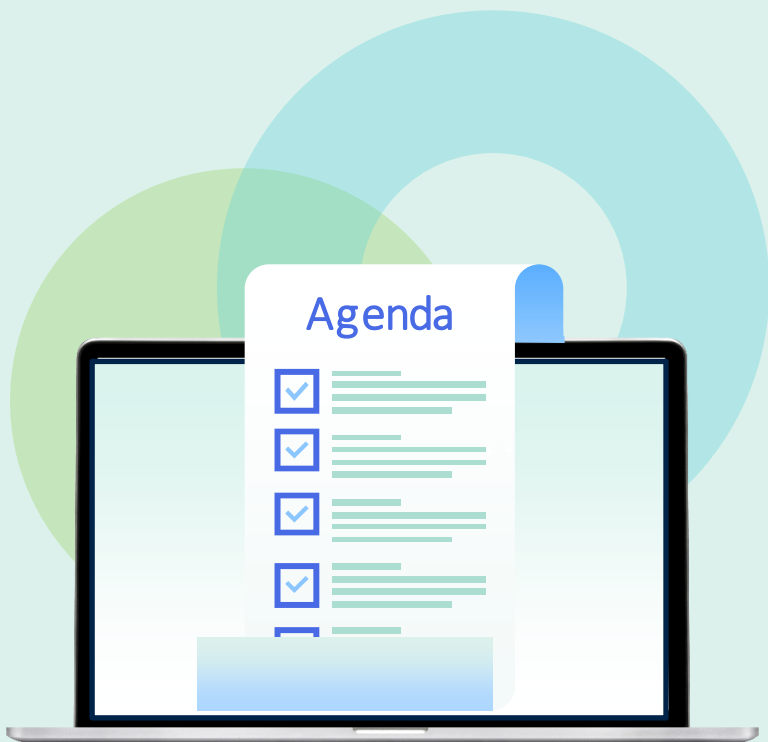
# Customize No-Results Message

**Problem:** The Analytics no-results message is generic and difficult to understand



**Solution:** Customize the message to be specific to the report





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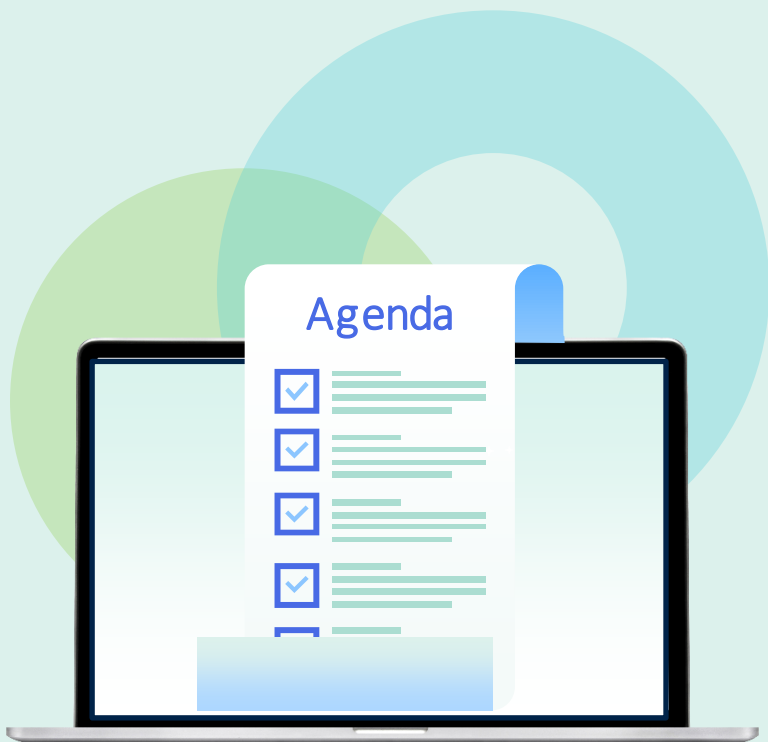
# Concatenate Two or More Fields (columns)

**Problem:** Information in two columns would be better in one column

Item Id	Barcode	Creation Date	Library Code
2372031610000121	26072021	7/26/2021	ULINC
2372101620000121	AU65911	8/3/2021	ULINC
2372121620000121	AU65912	8/3/2021	ULINC
2372131490000121	AU65926	8/5/2021	ULINC
2372131500000121	AU65925	8/5/2021	ULINC
2372131510000121	AU65924	8/5/2021	ULINC

**Solution:** Edit the formula in the field

Barcode	Creation Date	Library Code and Item Id
17082021	8/17/2021	ULINC - 2372964370000121
26072021	7/26/2021	ULINC - 2372031610000121
AU65911	8/3/2021	ULINC - 2372101620000121
AU65912	8/3/2021	ULINC - 2372121620000121
AU65913	8/5/2021	RES_SHARE - 2372131620000121
AU65914	8/5/2021	ULINC - 2372131610000121
AU65915	8/5/2021	ULINC - 2372131600000121
AU65916	8/5/2021	ULINC - 2372131590000121
AU65917	8/5/2021	ULINC - 2372131580000121



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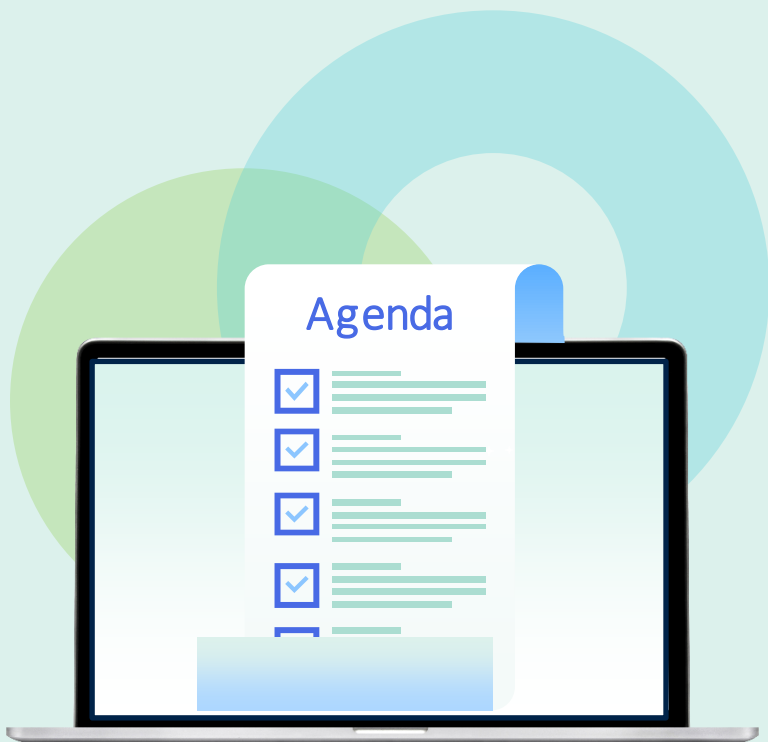
# Conditionally Change Text Format

**Problem:** Particular results in a field need to be formatted differently for better visibility

**Solution:** Change the Column Properties on that field with conditional formatting

Invoice-Number	Invoice Status
20180211-001	Fully invoiced
0212152	Partially invoiced
101215- CREDIT NOTE	Fully invoiced
101215-1	Fully invoiced
101215-2	Fully invoiced
111215-01	Partially invoiced
11122017	Fully invoiced

Invoice-Number	Invoice Status
20180211-001	Fully invoiced
0212152	Partially invoiced
101215- CREDIT NOTE	Fully invoiced
101215-1	Fully invoiced
101215-2	Fully invoiced
111215-01	Partially invoiced
11122017	Fully invoiced

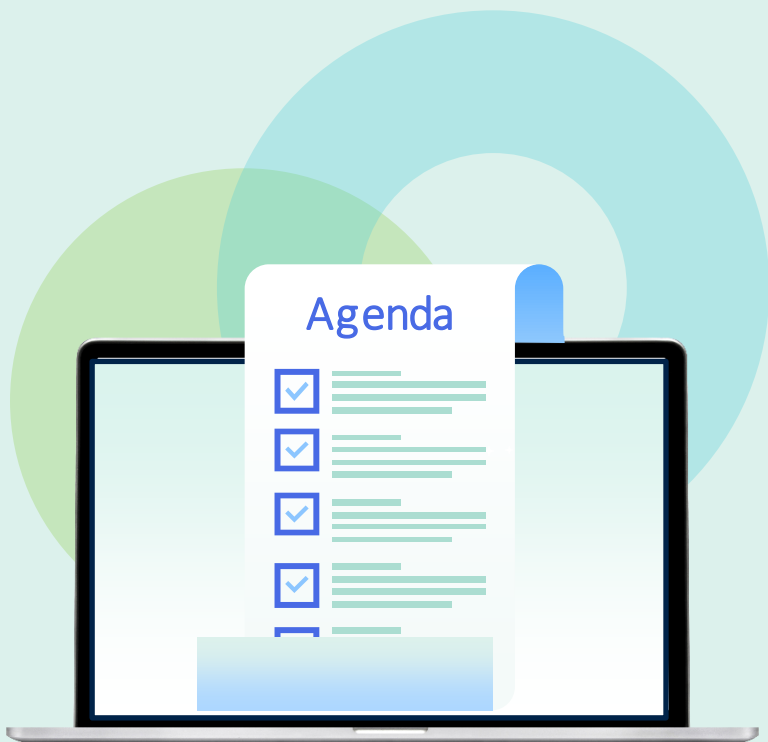


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# Open a Case

Speed up the response to your analytics problem by including the following in your case/ticket:

- Name of the analytics report and its path. Put it here:
  - Shared Folders/[your institution]
- Specific examples of data that is expected for the report



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# Conclusion

# Additional Resources

- Alma Analytics Documentation
  - Knowledge Center > Alma > Online Help > [Analytics](#)
  - Knowledge Center > Alma > Knowledge Articles > [Helpful Resources for Creating Alma Analytics Reports](#)
  - [LibGuide for Alma Analytics](#)
  - [Developer's Network](#)
- Training Videos
  - Knowledge Center > Alma > Training > Analytics
  - Ex Libris YouTube Channel – search for Alma Analytics
- Custom Training
  - [Premium.Services@exlibrisgroup.com](mailto:Premium.Services@exlibrisgroup.com)



# Thank you!

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Please fill out the survey that will appear  
when you close the WebEx meeting

Congratulations  
on becoming  
Alma Analytics  
Experts!

