INTRODUCTION TO ANALYTICS

TECHNICAL SEMINAR 2017 – CHICAGO, IL

CONNIE BRAUN| IMPLEMENTATION SERVICES MANAGER

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Agenda

1. **Introduction**
2. **Working with Out-of-the-Box Analyses**
3. **Creating New Analyses**
4. **Next Steps, Support Resources and Survey**

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Introduction

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Introductions

- Connie Braun, Implementation Services

- Callie Mendoza, Alma Support Analyst

- Benjamin Grimshaw, Alma Support Analyst

- Greg Walters, Alma Support Analyst

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Objectives and Target Audience

- Description: During this hands-on session, we'll examine some of the out-of-the-box analyses to view data that is retrieved in your production environment. In addition to going through the basic mechanics of editing these reports, we'll build several simple analyses and expose the results to others.
- Objective(s): By the end of this session you will know, understand and/or be able to:
  - Locate and run out-of-the-box analyses
  - Edit out-of-the-box analyses
  - Create one or more simple analyses
- Target Audience: anyone interested in or responsible for Alma Analytics reporting activities

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User Roles

Staff operators with the Design Analytics role may edit and create analyses as well as expose results to those without this role

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Hands-On 1

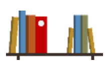
1. Let’s explore the Alma Analytics (Oracle Business Intelligence Enterprise Edition) environment

Working with Out-of-the-Box Analyses

Working with Out-of-the-Box Analyses

- Acquisitions – *Expenditure per Classifications*

- Fulfillment – *Count of Items Loaned by Patron Group*



- Inventory – *Physical Inventory Count*

- E-Inventory - *Electronic Inventory Count*

Hands-On 2

1. From the *Acquisitions* folder, let's open the <u>Expenditure per Classifications</u> analysis by clicking on the **Edit** button.
2. Look at the **results of the analysis**.
3. Identify the **three types of data** that we can view.
4. Modify how we are seeing the data displaying in the **Expenditures** column to include exact dollar values.
5. Use the **Save As** option to save the edited analysis to the institution folder.

Hands-On 3-1

1. From the *Fulfillment* folder, let's open the Count of Items Loaned by Patron Group analysis by clicking on the **Edit** button
2. Look at the **results of the analysis**
3. Notice the order of the columns on the Results tab
4. Hover over the *Library Name* column, place the cursor up to the "bubble" header where it becomes a and move the column to the left-most position; **Save as *<Initials> Items Loaned a Long Time Ago and Not Returned***.

Hands-On 3-2

6. Go to the Criteria tab to edit the *Loan Year* filter to limit the results to the oldest five years; **Save** and review via the Results tab.
7. While on the Results tab, open the **Bibliographic Details** folder, drag and drop the *Title* column to the right of the *Patron Group* column; add *Call Number* and *Barcode* from the **Loan Details** folder as well as *Due Date* from the **Due Date** folder.
8. Review the updated analysis.
9. Perform a final **Save** for the analysis.

Hands-On 4-1

1. From the *Inventory* folder, let's open the Physical Inventory Count analysis by clicking on the **Edit** button.
2. Look at the **results of the analysis**; do the numbers make sense?
3. The *Material Type* column represents data taken from the Bib fixed fields.
4. Let's modify this analysis to help us identify where we have material type mismatches between Bib and Item records.
5. Perform a **Save as**, calling the analysis, ***<initials> Physical Inventory Count with Bib and Item Material Types.***

Hands-On 4-2

6. While on the Results tab, open the *Physical Item Details* folder and add *Material Type* in the right-most position.
7. Look at the **results of the analysis** and notice any discrepancies.
8. Return to the Criteria tab to modify the Bib Material Type Column Header and customize the column name; do the same for the Item Material Type; Save the analysis.
9. Use the **Save As** option to save the edited analysis to the institution folder

Hands-On 5-1

1. From the *E-Inventory* folder, let's open the Electronic Inventory Count analysis by clicking on the **Edit** button.
2. Look at the **results of the analysis**; do the numbers make sense?
3. The *Material Type* column represents data taken from the Bib fixed fields.
4. Let's modify this analysis to help us determine what resources are represented by a specific material type.
5. Perform a **Save as**, calling the analysis, ***<initials> Electronic Inventory Where Material Type = ?.***

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Hands-On 5-2

6. Go to the Criteria tab to modify the *Material Type* filter changing it from "is prompted" to "is equal to / is in" and choose a Value representing the smallest number of electronic resources.
7. Save and look at the **results of the analysis**.
8. Staying on the Results tab, open the Bibliographic Details folder and drag-and-drop Title to insert it between the two existing columns.
9. Now we can see what electronic resources are represented by this material type.
10. Perform a final **Save** for the edited analysis.

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Creating a New Analysis

Hands-On 6-1

1. Start a new analysis by clicking on the *down arrow* next to *New* in the toolbar above the **Compound Layout** pane, and select **Analysis**. From the **Subject Areas** list that appears, select ***Users***.
2. From the *User Details* folder, double-click on **User Group** to add it to the *Selected Columns* pane. Do the same for **User ID**. Save the analysis and view the results.
3. Return to the Criteria tab to open the menu for the **User ID** column and select *Edit formula*.

Hands-On 6-2

4. With **"User Details"."User Id“** selected, click on the ***f(…)*** button to open the *Insert Function* menu. Open the *Aggregate* folder and select **Count** from the list of options.
5. Click on the OK button to see a change to Column Formula; click on the OK button to apply the change to the column of data.
6. Save the analysis again and view the results.
7. Return to the Criteria tab to open the menu for the column now named, COUNT(User Id), and choose Column Properties.
8. Go to the *Column Format* tab and customize the Column Heading, changing it to **Count**.
9. Save the analysis and view the results.

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Next Steps and Support Resources

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Next Steps and Support Resources

From the Knowledge Center,

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics

Q & A

Any Questions?

Session Survey Evaluation

Please use the following link https://www.surveymonkey.com/r/techsem2017 to provide feedback on your sessions.