Beginning Analytics

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Agenda

- Permissions
- Shared Reports
- Running Reports
- Exporting
- Editing Reports
- Saving
- New Report
- Gotchas
Caveats

Images and demonstrations are being done within a Network Zone. However, the concepts should still be relevant to everyone with Alma Analytics.

I use the term "reports" and "analysis" interchangeably.
Permissions Needed

- No Analytics Role
- Designs Analytics
- Analytics Administrator
No Analytics Role

- Within Alma, the Analytics Icon Appears
- If the Analytics Administrator has shared reports with your role, you may see reports under **Shared With Me**

This user has the cataloging and patron roles but nothing else.
Here's the list of reports available to my user.
No Analytics Role

Clicking on a specific report shows the report's details.
Designs Analytics

- Allows you to create both Alma and Primo Analytics reports.
- Also allows you to create purchase requests.
- The reports you see under Shared With Me depend on your role.
- Designs Analytics gives you access to the "Out of the Box Analytics" section within Alma.

Designs Analytics is the role you need if you want to create reports.
Analytics Administrator

- Without the Design Analytics role, cannot create reports
- Can see the Out of the Box Reports
- Can make reports viewable in Alma
- Can subscribe people to Alma reports
- Can make Analytics configuration changes

Analytics Administrator does not have the ability to create reports so for this presentation we're going to use the account with the Designs Analytics role.
Opening Up Alma Analytics

1. Click on the Analytics icon
2. Under **Create Analysis**, choose **Access Analytics**
By default, Analytics opens up into "My Dashboard" which if you're a new user is probably blank.
Click on the Catalog link to see existing reports.
Click Catalog to see already created reports. The section to the left allows you to browse for reports. Under Shared Folders there will be at least three folders displaying: Alma, Community, and your institution’s folder. The Alma folder contains reports created by Ex Libris. The Community folder contains reports created by Ex Libris Users.
Shared Reports: Alma Folder

- Created by Ex Libris
- Read only
Existing Reports: Community Folder

- Within Community folders, *everyone* has access to add, edit, and delete
  - There is a special procedure to delete a folder or report
- Don't make edits to other people's reports. Make a copy and save in your own folder before making changes
- Not all Alma customers use the same Alma Analytics servers. Community reports are shared across regions even Friday night
- Additional information is on Ex Libris' [Community Folder Structure](Ex Libris Documentation: Community Folder Structure) page
Shared Reports: Institution

- Anyone in your institution can view, edit, and delete reports in these folders
- Check with your institution to see if there are any best practices you should follow
- No one outside your institution can see these
Shared Institution: Institution + NZ

- If you belong to a consortium with a network zone, you may see an additional shared folder
  - This is a feature that requires both your Network Zone Administrator and your Institution Zone Administrator to enable within their respective Alma instances
- If you are using Analytics from an IZ with a Shared Network Zone folder
  - You may run but not edit reports within the Network Zone
  - When you run reports from the Network Zone folder, it will only retrieve data for your institution

Ex Libris Documentation: Configuring Analytics for the Network Zone
Copying an Existing Report

- **Right** click on the report you wish to copy
- **Choose** Copy
Copying an Existing Report

- Browse to where you wish to paste the report
- Choose **Paste** from the menu
Opening an Existing Report

- Browse to the correct folder
- If you're not planning to edit the report, click **Open**
  - This will ensure you see any prompts
Opening an Existing Report

- What may happen if you try to run a report by clicking **Edit**
- That said, I prefer where the export options are located when I choose **Edit** instead of **Open**
Exporting an Existing Report

If you run a report by clicking "Open," the export options will be at the bottom of the report.

Use Newly Activated Portfolios
Exporting an Existing Report

Use Newly Activated Portfolios
Export Options and Limitations

- Formatted - Export limit of 2 million cells*
  - PDF
  - Excel
  - Powerpoint
  - Web Archive
- Data - Export limit of 10 million rows*
  - Excel
  - CSV
  - Tab Delimited
  - XML

* This summer I was unable to export a report with 1.5 million rows so in many ways, these limits are more theoretical rather than practical.
https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Is_there_a_limit_in_the_Analytics_export_to_Excel
## Newly Activated Portfolios

<table>
<thead>
<tr>
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<th>Electronic Collection Public Name</th>
<th>Title</th>
<th>Portfolio Linked To CZ</th>
<th>MMS Id</th>
</tr>
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<tbody>
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<td>No</td>
<td>MMS Id</td>
</tr>
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<td>Action in uncertainty : expertise, design and crisis management /</td>
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<td>MMS Id</td>
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### Export Options: Data CSV

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<thead>
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<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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<td></td>
</tr>
</tbody>
</table>
The default behavior when click on Edit is to retrieve results. However, you can change it to default to the Criteria tab instead. Click the My Profile icon in the upper right corner. Choose My Account. On the Preferences tab, next to Analysis Editor, click the drop down next to Full Editor and choose "Start on Criteria tab when editing Analysis". Then click OK.
Editing an Existing Report: Adding new columns

- Browse the subject area on the left
- Expand the folders as needed and double check when you find the desired field

OR

- Search for the field
- Hover your mouse over the field to verify which subject/folder the field comes from
- Double click to add to the report

Note: The order in the "criteria" tab does not necessarily match the order in the "results" tab. The export order for data will be the same as the criteria order and the export order for formatted will be the same as results.
Editing an Existing Report: Excluding a Column

- Exclude a column
  - Click on the Results link
  - Right click on the label of the column you wish to exclude
  - Choose Exclude column

- Include a column again
  - Right click on any column
  - Click on Include column
  - Click on the appropriate column
Editing an Existing Report: Deleting a Column

- Click on the **Criteria** link
- Click on the gear next to the column you wish to delete
- Select **Delete**
Editing an Existing Report: Editing Filters

- On the **Criteria** screen hover over the filter to change
- Click on the pencil icon
- Enter the new value and click **OK**
- Click **Results** to see the new results
Filtering by multiple values:

- When editing the filter, click the search icon next to value
- Click the pencil next to selected
- Paste in values, one per line
- Click **OK** several times
**Editing an Existing Report: Adding New Filters**

If you wish to filter on a column in the "Selected" section:

- On the Criteria screen click the gear next to the appropriate column
- Click on **Filter**
- Choose the appropriate operator and value then click **OK**
Editing an Existing Report: Adding New Filters

Another way to add a filter

- Start from the Criteria screen
- In the bottom filter section click on "create filter" icon
- Click **More Columns**
- Browse for the column you wish to filter on

![Filters](image)

MMS Id is equal to / is in
9918582792506531
Editing an Existing Report: Deleting Filters

- On the **Criteria** screen hover over the filter to delete
- Click on the X icon

![Filters](image-url)
Saving Reports
Creating a Report from Scratch

One of the first steps is choosing a "subject"

- What information do you need? Each subject has different fields available.
- How current do you need the information to be?

If you're creating new reports often, bookmark Alma Analytics Subject Areas. Pay close attention to anything highlighted in yellow.

Most fields in the Title subject are updated monthly, not daily. Within e-Inventory, Cost Usage information is updated monthly.
Creating a Report from Scratch

- Click on **Create**
- Choose **Analysis**
- Select subject area
Creating a Report from Scratch: Institution and OCLC

- In this case, I'm going to use the Titles subject
- Add columns and filters just like we did when editing existing reports. In this case:
  - Column: OCLC Control Number (035a)
  - Column: Institution Name
  - Filter: OCLC Control Number (035a) = 1305911488
Creating a Report from Scratch: First result

<table>
<thead>
<tr>
<th>OCLC Control Number (035a)</th>
<th>Institution Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1305911488</td>
<td>UC San Diego</td>
</tr>
</tbody>
</table>
Creating a Report from Scratch: Reasonableness Check

Always double check if the data you're retrieving seems reasonable. It's fairly common for me to either run into a known issue or a new bug.

How to check:

- Deep knowledge of the subject area
  
  OR

- Select a small sample size and check against Alma
Creating a Report from Scratch: Always add measures

Ex Libris Documentation: Creating a New Report

"To ensure accurate results in your report, it is recommended to use at least one measure field from the fact of the subject area as a column or filter . . . If the measure is not required in the report's output, you can hide the measure in the results pane."
Creating a Report from Scratch: Titles Subject

Reviewing the Titles Documentation
Creating a Report from Scratch: Second result

<table>
<thead>
<tr>
<th>OCLC Control Number (035a)</th>
<th>Institution Name</th>
<th>Num of Titles (All)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1305911488</td>
<td>UC San Diego</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>University of California Berkeley</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>University of California Davis</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>University of California Los Angeles</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>University of California Riverside</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>University of California System</td>
<td>1</td>
</tr>
</tbody>
</table>
Creating a Report from Scratch: Hiding a Column

- In **Criteria**, click the gear column
- Click on **Column Properties**
- Select **Column Format**
- Click the **Hide** checkbox
- Click **OK** and re-run report
Creating a Report from Scratch: Third result

<table>
<thead>
<tr>
<th>OCLC Control Number (035a)</th>
<th>Institution Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1305911488</td>
<td>UC San Diego</td>
</tr>
<tr>
<td></td>
<td>University of California Berkeley</td>
</tr>
<tr>
<td></td>
<td>University of California Davis</td>
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<td></td>
<td>University of California Riverside</td>
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<tr>
<td></td>
<td>University of California System</td>
</tr>
</tbody>
</table>
Gotchas

- Lifecycle
- Timeouts
- Opening another Alma session
- Exporting problems
  - "Server is busy" or it never finishes "processing" the export
- When was the data last updated?
  - Alma Analytics should only be one day behind Alma but sometimes it loads slow.
  - Some data only refreshes monthly by design.

Lifecycle: Alma Analytics includes deleted information. To make sure you're only including current bibs, items, etc, make sure you filter to an "In Repository" or "Active" lifecycle.

Timeouts: Intermittently go back to Alma and make sure you keep the session alive. Otherwise, you'll be logged out of Analytics.

Exporting problems: If you get a server is busy message, immediately submit at least a high priority ticket with Ex Libris.

Data last Updated: In general, Analytics should only be a day behind but you can check in Alma when it was last updated. That said, some columns only updated monthly.
Additional Resources

- **Video:** [Alma Analytics: Become an Export](https://www.youtube.com/watch?v=highly recommended)
- **Common Analytics Procedures**
- **Harvard Wiki: Alma Analytics**
Questions?

Contact Info: gem.stone-logan@ucop.edu