
Cheat Sheet - Ask the Expert Advanced Analytics Sessions

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Created on: 8/22/2018

Posted to Alma-L by Doris Munson from Eastern Washington University (2018 - AUG)

Ask the Expert Analytics for Advanced Users

[https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Analytics | Documentation for all 3 sessions is here]

[[https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9954_2018-02-06_-_Analytics_for_Advanced_Users_\(Part_1\)](https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9954_2018-02-06_-_Analytics_for_Advanced_Users_(Part_1)) | Analytics for Advanced Users, session 1]

How to create a prompt – Minute 5

How to create a case-insensitive prompt – Minute 16

How to change the “no results” message – Minute 26

Regular expressions – Minute 32

How to use multiple filters per column – Minute 49

How to concatenate two or more fields – Minute 54, quick explanation, better coverage in session 2

[[https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9952_2018-04-09_-_Analytics_for_Advanced_Users_\(Part_2\)](https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9952_2018-04-09_-_Analytics_for_Advanced_Users_(Part_2)) | Analytics for Advanced Users, session 2]

How to include values chosen in prompts as part of the header – Minute 3, actual instructions start at Minute 6

Alternative method using a column and “edit formula” -- Minute 14

How to move a column – Minute 18-19

How to display the total number of rows – Minute 21

This is a great tutorial on how to take one column and edit it to do something else, and how to add a narrative

How to concatenate two or more fields – Minute 32 (Better coverage than in session 1)

Function > Conversion > Cast as to simplify Creation Date

How to separate semicolon delimited values into separate columns – Minute 44

Use regular expression to separate at semicolon

Example in ppt is for reserves, Yoel shows how to change regEx to use it for ISBNs

Edit Resource type so that only part after dash appears -- Minute 49

Uses regular expression

How to change display default in Analytics Edit mode from Results tab to Criteria tab – Minute 55

[[https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9950_2018-05-15_-_Analytics_for_Advanced_Users_\(Part_3\)](https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9950_2018-05-15_-_Analytics_for_Advanced_Users_(Part_3)) | Analytics for Advanced Users, session 3]

Create an itemized set in Alma from Analytics report – Minute 3

Yoel had technical problems, so go to minute 14 to see how the set is created in Alma

Minute 17 – can run jobs on created set

[https://knowledge.exlibrisgroup.com/@api/deki/files/63977/Analytics_-_Creating_sets_in_Alma_from_Alma_Analytics_Reports_ELUNA_2018.pptx?revision=1 | ELUNA 2018 presentation]

Who can access Analytics objects in Alma – Minute 18

How to conditionally change the text format in an Analytics report – Minute 24

Column Properties > Conditional Format

Can add more than one condition

How to use the CASE condition to change text in a report– Minute 30

To group things together for reporting purposes

Edit Formula > Insert Function > Expressions > CASE switch

Uses WHEN ... THEN... ELSE...

Can have multiple When/Then statements

Tip at Minute 40 --- Use FusionFX to run a report, esp. if you have a prompt

3 subjects done at the same time: How to use the SUBSTRING function to separate part of a field; and separate the date time field into date and time – Minute 44

Edit Formula > CAST changes to date or time – easiest is to copy from documentation

Internet search of “Cast as obiee” gives all options

How to get hour of loan – Minute 52

Example: Loans at circulation desks by hour for last year

SUBSTRING at minute 58—example of editing a regEx to use with a different field

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