

Alma Analytics: Become an Expert

Alma Analytics: Become an Expert is a series of eight 90-minute sessions intended to provide learning opportunities for Alma Analytics operators at all levels. These sessions include information on using Analytics to manage inventory, monitor Acquisitions and Fulfillment activities and more.

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The Become an Expert series is structured as follows:

- Session 01 = A general overview and introduction
- Sessions 02-03 = A focus on specific areas such as physical and electronic inventory, fulfillment, acquisitions and COUNTER usage.
- Sessions 04-08 = A drill down to specific analytics functions that can help you create reports more efficiently.



Session Number	Session Name	Description	Additional Resources	Recording
01	Overview and Introduction to Analytics	This session includes: <ul style="list-style-type: none"> • Accessing and "consuming" analytics • Roles • ETL - Extract, Transform, and Load • Folder structure of ready-to-use reports • Dashboards • Create a report 	Presentation Slides Exercises Questions and Answers from the live training sessions More documentation and training resources: <ul style="list-style-type: none"> • Documentation • Analytics Subject Areas • Training Resources 	18 September 2024 View Recording Note: Captions on the recording were created by an automated system and are not entirely accurate.

02	Physical Inventory and Fulfillment in Alma Analytics	<p>This session includes:</p> <ul style="list-style-type: none"> • Default, ready-to-use reports and dashboards that analyze physical inventory and fulfillment • Creating custom reports that analyze physical inventory and fulfillment 	<p>Presentation Slides</p> <p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <ul style="list-style-type: none"> • More documentation and training resources: <ul style="list-style-type: none"> ◦ Documentation ◦ Physical Items Subject Area ◦ Common Analytics Procedures ◦ Fulfillment Subject Area ◦ Training Resources 	<p>25 September 2024</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
03	Electronic Inventory, Usage and Acquisitions in Alma Analytics	<p>This session includes:</p> <ul style="list-style-type: none"> • Default, ready-to-use reports and dashboards that analyze electronic inventory, usage, and acquisitions • Creating custom reports that analyze electronic inventory, usage, and acquisitions 	<p>Presentation Slides</p> <p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <ul style="list-style-type: none"> • Analytics Documentation • Subject Areas <ul style="list-style-type: none"> ◦ E-Inventory ◦ Link Resolver Usage ◦ Usage Data ◦ Funds Expenditure • Common Analytics Procedures • Training Resources 	<p>02 October 2024</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
	Creating and Managing	During this session, we show how to:	Presentation Slides	09 October 2024

04	Dashboards in Analytics	<ul style="list-style-type: none"> • Create a new analytics dashboard • Edit a default dashboard • Create a dashboard prompt 	<p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <ul style="list-style-type: none"> • Analytics Documentation <ul style="list-style-type: none"> ◦ Creating a Dashboard • Common Analytics Procedures • Training Resources 	<p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
05	Creating and Managing Prompts in Analytics	<p>This session focuses on the following:</p> <ul style="list-style-type: none"> • How prompts are used in analytics reports • How to create a prompt in an Alma Analytics report • How to refine your prompts 	<p>Presentation Slides</p> <p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <ul style="list-style-type: none"> • Analytics Documentation • Common Analytics Procedures <ul style="list-style-type: none"> ◦ Create a Prompt • Training Resources 	<p>16 October 2024</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
06	Filters and Functions in Analytics	<p>This session covers how to create Filters for:</p> <ul style="list-style-type: none"> • Contents of a specific position of a control field in Alma Analytics • Multiple filters per column in an analytics report • Special characters <p>And how to create Functions that:</p> <ul style="list-style-type: none"> • Change a date & time field to only contain the date • Count the number of rows in a table • Create conditional if/when statements • And more! 	<p>Presentation Slides</p> <p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <p>More documentation and training resources:</p> <ul style="list-style-type: none"> • Useful Custom Formulas • Common Analytics Procedures • Presentations - Filters • Presentations - 	<p>23 October 2024</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>

			Functions	
07	Analytics Objects	<p>This session includes how to:</p> <ul style="list-style-type: none"> • Add an analytics widget to the Alma home page • Create an analytics dashboard object that is accessible from the Analytics menu • Create a report object • Create a scheduled report to be sent to Alma and non-Alma users • Automate sending a report to an FTP server • Common problems to avoid 	<p>Presentation Slides</p> <p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <p>More documentation and training resources:</p> <ul style="list-style-type: none"> • Analytics Objects Documentation • Analytics Documentation • Training Resources 	<p>30 October 2024</p> <p>Video recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
08	Useful Tips in Analytics	<p>In this final session, we cover how to:</p> <ul style="list-style-type: none"> • Save a customized Alma Analytics column for future reports • Add a logo to the top of a report • Create an Alma set from an analytics report • Customize the "no results" message • Concatenate two or more fields in a report • Conditionally change the text format a report • Use analytics report output as the input for a subsequent report <p>If time permits at the end of the session, attendees will be invited to ask questions and discuss any subject of the entire series of classes.</p>	<p>Presentation Slides</p> <p>Exercises</p> <p>Questions and Answers from the live training sessions</p> <p>More documentation and training resources:</p> <ul style="list-style-type: none"> • Analytics Documentation • Training Resources • Knowledge Article: Helpful Resources • Developer Network 	<p>06 November 2024</p> <p>Video recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>