

# Alma Analytics – Beyond out-of-the-box reports: Tips for formatting and customization



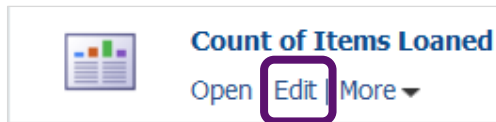
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Collection Services Librarian  
Georgia State University  
GIL User Group Meeting, 2018

# Agenda

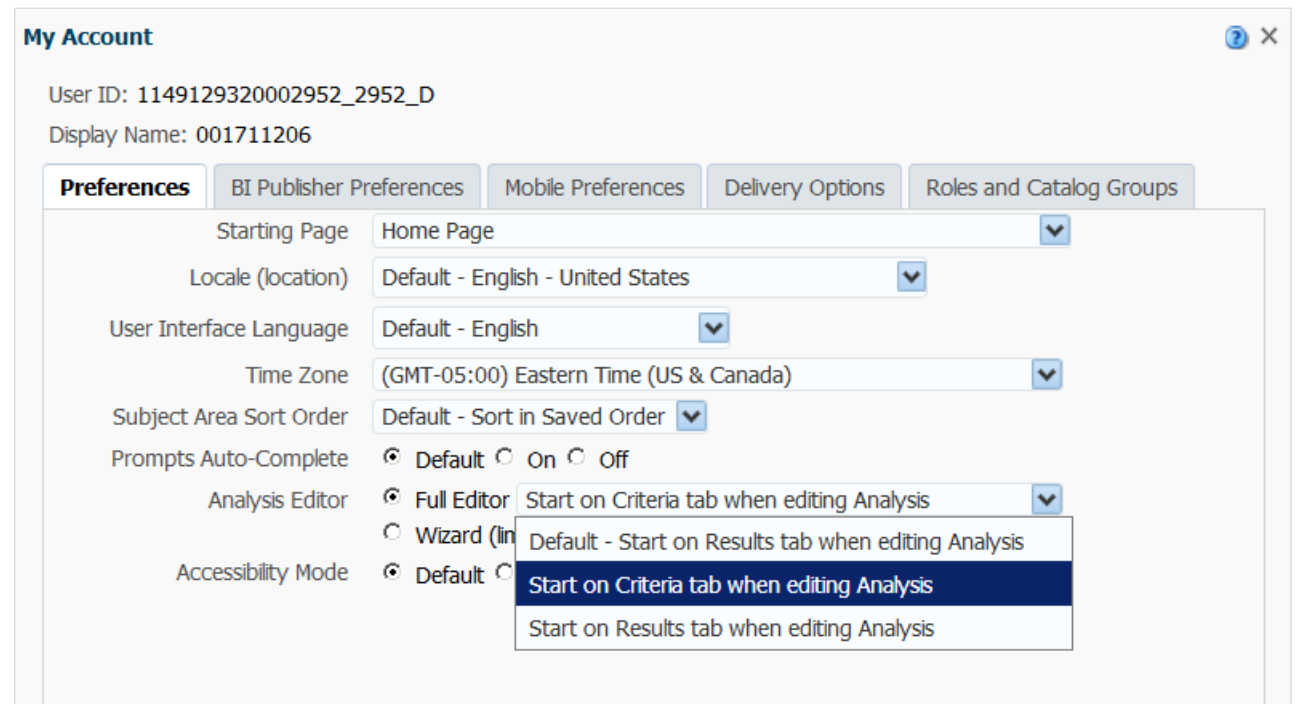
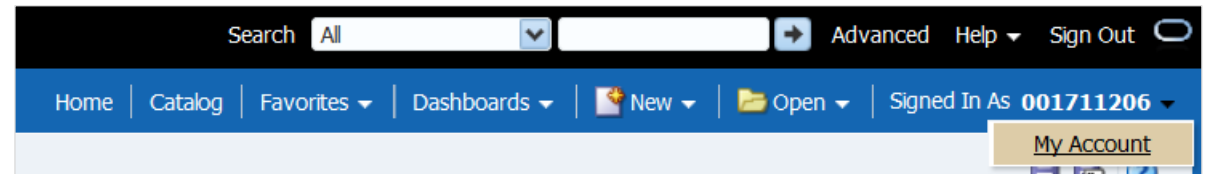
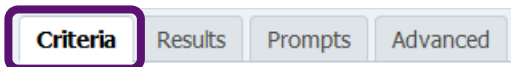
- Account default settings
- Title view
- Row count totals
- “No Results” messages
- Number and date formats
- String functions
- Bins
- Reordering and sorting columns
- Table formatting
- Conditional formatting
- Graphs/charts
- Prompts

# Changing your default settings

When editing an analysis:



You can choose to start on the **Criteria** tab instead of the **Results** tab if you prefer.



# General cosmetic improvements

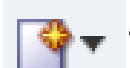
MMS ID	Title	LC Classification Code	In House Loan Indicator	Loan Date
9912662323402952	Nietzsche and the fate of art /	B	N	5/9/2018
9912792123402952	The heirs of Plato : a study of the Old Academy, 347-274 B.C. /		Y	5/9/2018
9914292843402952	The expulsion of the triumphant beast /		N	5/9/2018
991441753402952	Nietzsche and art,		N	5/9/2018
9914973313402952	The Greek praise of poverty : origins of ancient Cynicism /		Y	5/9/2018
991994373402952	Sense and non-sense /		N	5/9/2018
9920876603402952	Epicureanism /		Y	5/9/2018
9921536983402952	Becoming God : pure reason in early Greek philosophy /		Y	5/9/2018
9921848723402952	The traveler's guide to classical philosophy /		Y	5/9/2018
9924611593402952	The logos of the living world : Merleau-Ponty, animals, and language /		N	5/9/2018
9925144783402952	Tractatus logico-philosophicus /		Y	5/9/2018
9929171483402952	The flesh of images : Merleau-Ponty between painting and cinema /		N	5/9/2018
9933668973402952	Gilles Deleuze's transcendental empiricism : from tradition to difference /		Y	5/9/2018
994030093402952	The middle platonists : a study of platonism, 80 B.C. to A.D. 220 /		Y	5/9/2018
99660073402952	The great tradition : further studies in the development of Platonism and early Christianity /		Y	5/9/2018
996969533402952	Nietzsche's philosophy of art /		N	5/9/2018
996978593402952	Consciousness explained /		Y	5/9/2018
997994563402952	The middle platonists, 80 B.C. to A.D. 220 /		Y	5/9/2018
998464593402952	A companion to the philosophers /		Y	5/9/2018
9929327583402952	What is the history of knowledge? /	BD	N	5/9/2018
9911046593402952	The archetypes and the collective unconscious /	BF	N	5/9/2018
9912442243402952	Yoga and psychology : language, memory, and mysticism /		Y	5/9/2018
991499303402952	The way to fulfillment; psychological techniques,		Y	5/9/2018
9916213683402952	Psychology and religion : classical theorists and contemporary developments /		Y	5/9/2018
991702493402952	Development of the creative individual.		N	5/9/2018
9919803613402952	Life-span development /		Y	5/9/2018
9921543443402952	The psychology of spirituality : an introduction /		Y	5/9/2018

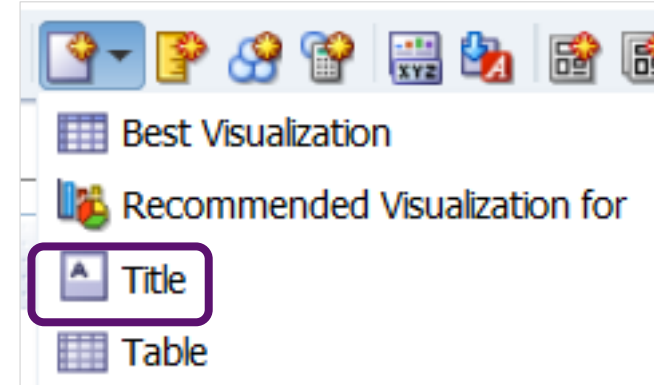
A default analysis without any formatting provides no context clues for the user.

## Unanswered questions:

- What am I looking at?
- How many results are there?

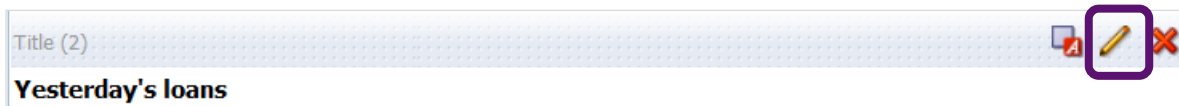
# Adding an analysis title

In the **Results** tab, select the **New View** icon  to add a title view.



By default this will display the name you have given your analysis, but you can customize this by editing the view.

**Note:** When you add views, they originally appear on the Compound Layout in the order you create them. You'll need to drag a newly created Title view to the top.



# Editing the title view

Uncheck to replace the analysis title with your customized title.

**Yesterday's loans**

Criteria **Results** Prompts Advanced

Title:2

Title Yesterday's loans from the Atlanta campus

☐ Display Saved Name

☐ Logo  Select Image

Optional - URL of a title image.  
*Note: When running in a secured environment, only resources relative path prefixed with "fmap:".*

Subtitle includes the main and browsing collections, exclu

Started Time Do not display

You can also choose to add a subtitle or display the date and/or time the report ran.

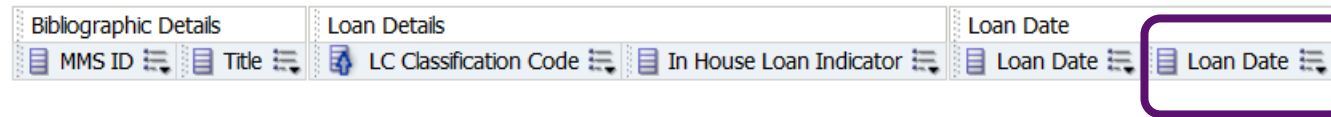
## Yesterday's loans from the Atlanta campus

includes the main and browsing collections, excludes reserves  
Date run: 5/10/2018

MMS ID	Title	LC Classification Code	In House Loan Indicator	Loan Date
9912662323402952	Nietzsche and the fate of art /	B	N	5/9/2018
9912792123402952	The heirs of Plato : a study of the Old Academy, 347-274 B.C. /		Y	5/9/2018
9914292843402952	The expulsion of the triumphant beast /		N	5/9/2018
991441753402952	Nietzsche and art,		N	5/9/2018
9914973313402952	The Greek praise of poverty : origins of ancient Cynicism /		Y	5/9/2018
991994373402952	Sense and non-sense /		N	5/9/2018
9920876603402952	Epicureanism /		Y	5/9/2018
9921536983402952	Becoming God : pure reason in early Greek philosophy /		Y	5/9/2018
9921848723402952	The traveler's guide to classical philosophy /		Y	5/9/2018
9924611593402952	The logos of the living world : Merleau-Ponty, animals, and language /		N	5/9/2018
9925144783402952	Tractatus logico-philosophicus /		Y	5/9/2018
9929171483402952	The flesh of images : Merleau-Ponty between painting and cinema /		N	5/9/2018
9933668973402952	Gilles Deleuze's transcendental empiricism : from tradition to difference /		Y	5/9/2018
994030093402952	The middle platonists : a study of platonism, 80 B.C. to A.D. 220 /		Y	5/9/2018
99660073402952	The great tradition : further studies in the development of Platonism and early Christianity /		Y	5/9/2018
996969533402952	Nietzsche's philosophy of art /	BD	N	5/9/2018
996978593402952	Consciousness explained /		Y	5/9/2018
997994563402952	The middle platonists, 80 B.C. to A.D. 220 /		Y	5/9/2018
998464593402952	A companion to the philosophers /		Y	5/9/2018
9929327583402952	What is the history of knowledge? /		N	5/9/2018
9911046593402952	The archetypes and the collective unconscious /	BF	N	5/9/2018
9912442243402952	Yoga and psychology : language, memory, and mysticism /		Y	5/9/2018
991499303402952	The way to fulfillment; psychological techniques,		Y	5/9/2018

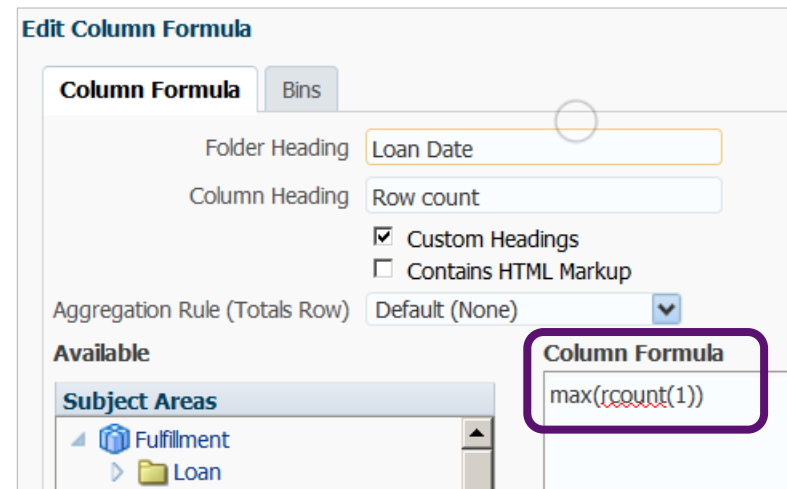
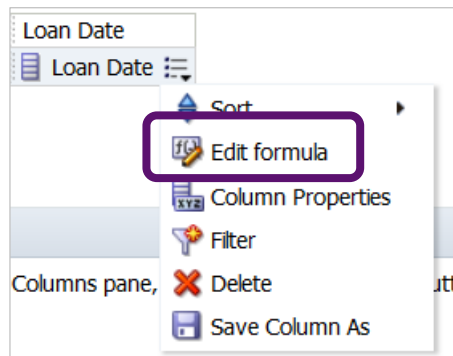
# Adding a row count total

In **Criteria** view, add **ANY** extra column to your analysis;  
Keep note of the column #



Column # 6

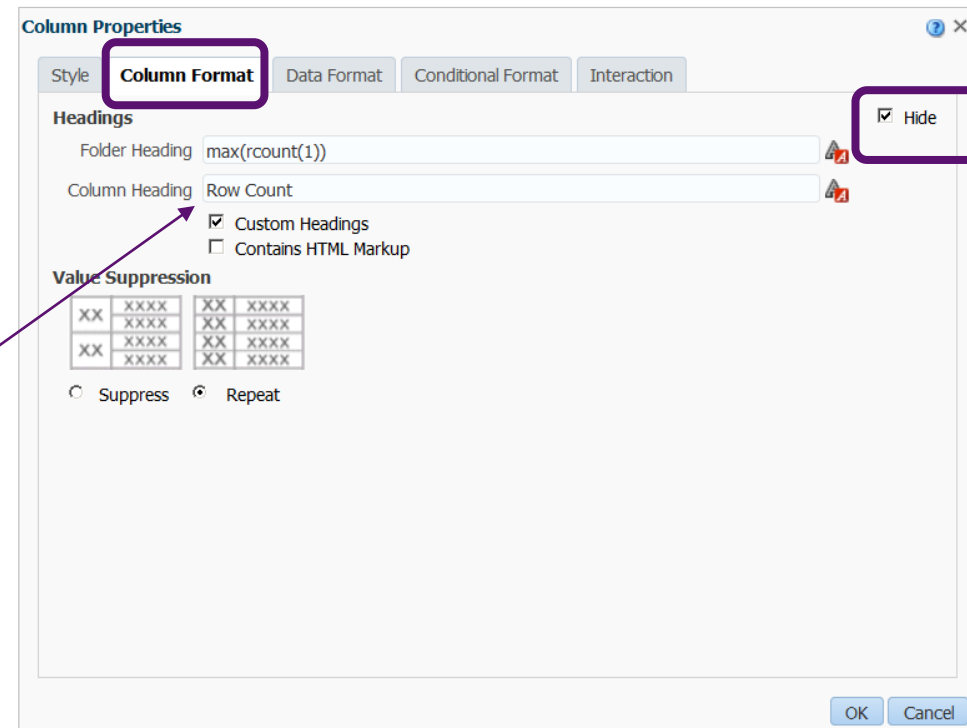
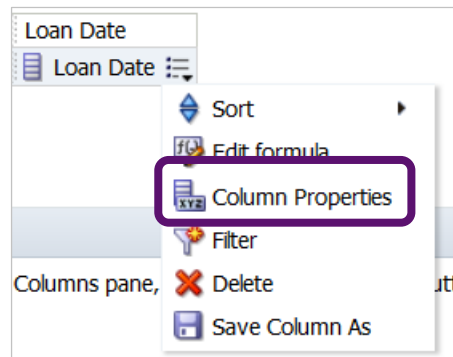
Edit the column's formula to be: **MAX(RCOUNT(1))**



# Row count

Edit the column's properties to hide it from display:

## Column Properties – Column Format – top right check box



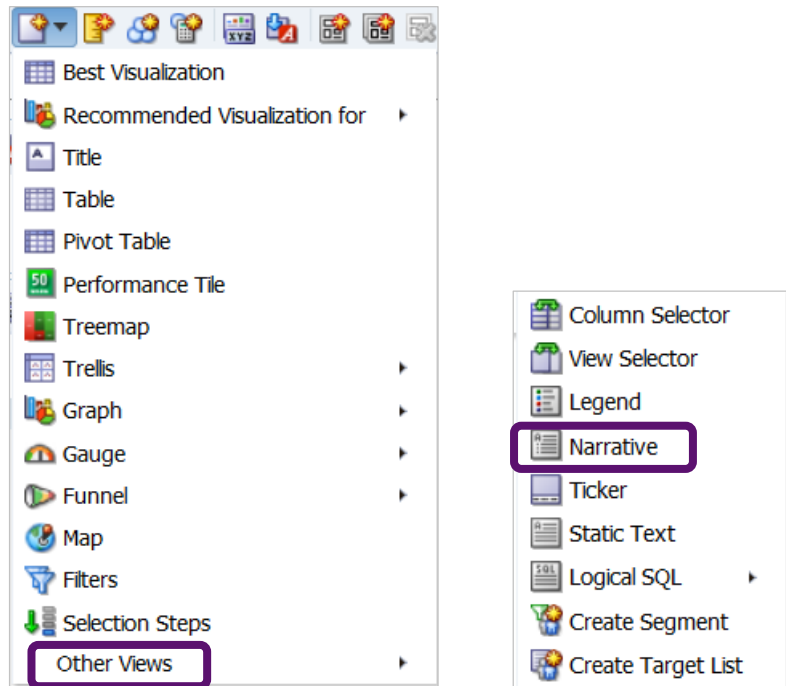
Even though the column isn't visible in the results, it is useful to rename it something related to its function.



# Row count

Add a **Narrative** view:

Switch to the **Results** tab - **New View** - **Other Views** - **Narrative**



The narrative view allows you to combine text with query column values - useful for providing context or extended descriptions, etc.

If you don't need to pull values from the query, but just need to add text, you could also consider the **Static Text** view.

# Row count

## Edit Narrative view










Narrative (4)  

In the **Narrative box**, call the column values you want to retrieve.

Use the **@** symbol and the **#** of the column(s) you want to call. **@6** calls the values for the Row Count column.

**Total rows =** is the text I'm adding in.

**Narrative:3**

**B** **i** **u** **Line Break** ☐ Contains HTML Markup

Prefix

Narrative

Row separator

Postfix

Preview

Rows to display 1

Total rows = 313

Put a **1** here if you only want to display the narrative once. Otherwise it will display for every row in the analysis.

7) Use the Format Container option to adjust the horizontal alignment of the Narrative.

Georgia State University | UNIVERSITY LIBRARY

# Improved analysis

## Yesterday's loans from the Atlanta campus

includes the main and browsing collections, excludes reserves

Date run: 5/10/2018

Total rows = 313


MMS ID	Title	LC Classification Code ▲▼	In House Loan Indicator	Loan Date
9912662323402952	Nietzsche and the fate of art /	B	N	5/9/2018
9912792123402952	The heirs of Plato : a study of the Old Academy, 347-274 B.C. /		Y	5/9/2018
9914292843402952	The expulsion of the triumphant beast /		N	5/9/2018
991441753402952	Nietzsche and art,		N	5/9/2018
9914973313402952	The Greek praise of poverty : origins of ancient Cynicism /		Y	5/9/2018
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9921848723402952	The traveler's guide to classical philosophy /		Y	5/9/2018
9924611593402952	The logos of the living world : Merleau-Ponty, animals, and language /		N	5/9/2018
9925144783402952	Tractatus logico-philosophicus /		Y	5/9/2018
9929171483402952	The flesh of images : Merleau-Ponty between painting and cinema /		N	5/9/2018
9933668973402952	Gilles Deleuze's transcendental empiricism : from tradition to difference /		Y	5/9/2018
994030093402952	The middle platonists : a study of platonism, 80 B.C. to A.D. 220 /		Y	5/9/2018
99660073402952	The great tradition : further studies in the development of Platonism and early Christianity /		Y	5/9/2018
996969533402952	Nietzsche's philosophy of art /		N	5/9/2018
996978593402952	Consciousness explained /		Y	5/9/2018
997994563402952	The middle platonists, 80 B.C. to A.D. 220 /		Y	5/9/2018
998464593402952	A companion to the philosophers /		Y	5/9/2018
9929327583402952	What is the history of knowledge? /	BD	N	5/9/2018
9911046593402952	The archetypes and the collective unconscious /	BF	N	5/9/2018
9912442243402952	Yoga and psychology : language, memory, and mysticism /		Y	5/9/2018
991499303402952	The way to fulfillment; psychological techniques,		Y	5/9/2018

# Customizing the no results message

The library was closed yesterday...

ExLibris Analytics Business Intelligence

Yesterday's loans

 **No Results**

The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again. The filters or selection steps currently being applied are shown below.

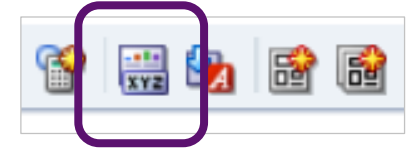
**Filters**

Library Name is equal to / is in **GSU Library (Atlanta Campus)**  
**and** Location Name is equal to **ATL Browsing, ATL Folio, ATL General LN3, ATL General LN4, ATL General LN5, ATL General Q, ATL Ultra Folio**  
**and** Loan Date is equal to / is in **05/06/2018**

[Refresh](#)

# Customizing the no results message

Use the “xyz” **Edit Analysis Properties** button on the **Results** tab.



Change the **No results settings** to **Display Custom Message** and create your own.

**Analysis Properties**

**Results Display** Interactions Data

No Results Settings Display Default Message ▼

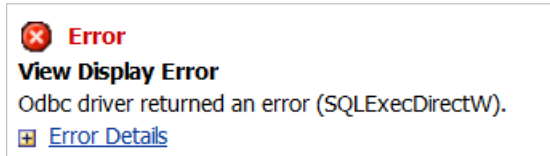
Header

Message

View for Text Delivery compoundView!1 ▼

**No Results Found for "Yesterday's Loans"**  
No items circulated yesterday.  
[Refresh](#)

# Customizing error messages

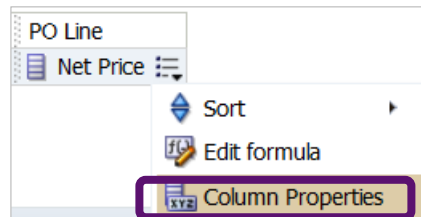


System generated error messages are technically customizable, but not by us. Access to administration in Oracle BI analytics and server files is required 😞



# Changing the format of numbers

Edit Column Properties – Data Format tab – Check **Override Default Data Format** – select desired options

A screenshot of the 'Column Properties' dialog box, 'Data Format' tab. The 'Override Default Data Format' checkbox is checked and highlighted with a red box. Below it, 'Treat Numbers As' is set to 'Number', 'Negative Format' is 'Minus: -123', and 'Decimal Places' is '0'. The 'Use 1000's Separator' checkbox is also checked.A screenshot of the 'Treat Numbers As' dropdown menu. The 'Currency' option is selected and highlighted with a red box. Other options include 'Number', 'Percentage', 'Month Name', 'Month Name (Abbreviated)', 'Day Name', 'Day Name (Abbreviated)', and 'Custom'.

Reformatted price is treated as currency



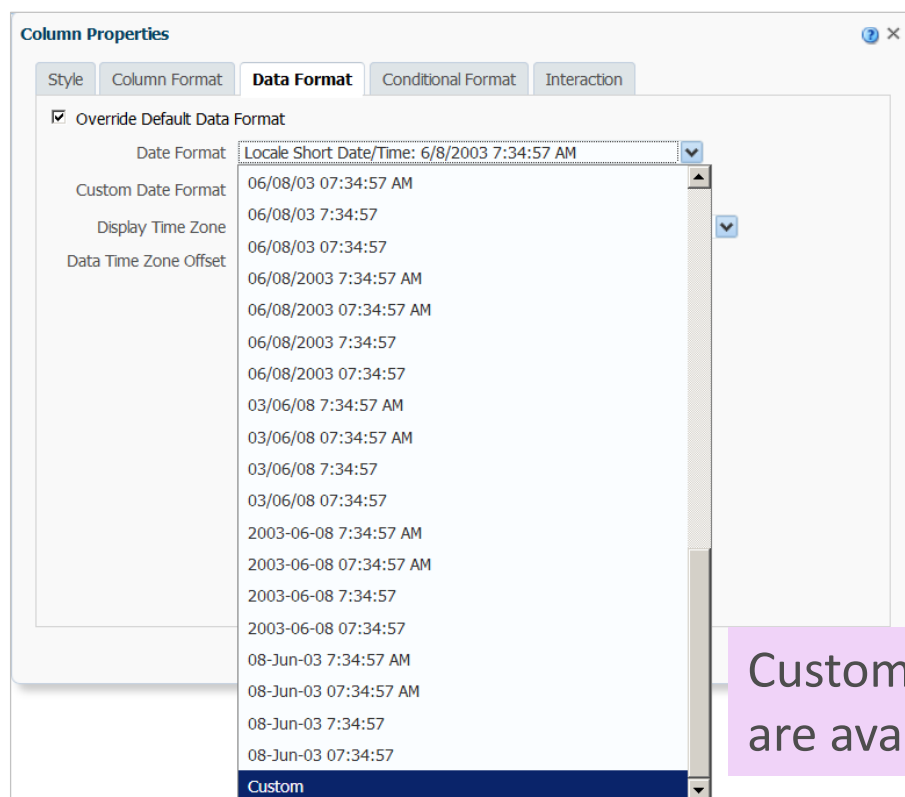
Net Price
\$93.95
\$154.04
\$119.95
\$77.43
\$142.63
\$122.20
\$22.01
\$113.29



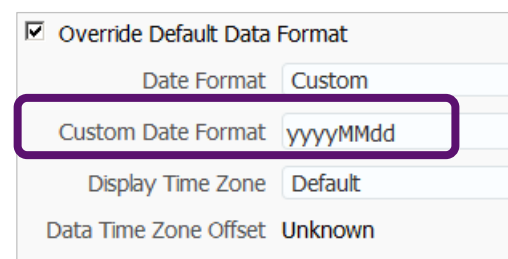
# Changing the format of dates

The **Data Format** tab is contextual. Alter the date format the same way:

Edit **Column Properties** – **Data Format** tab – Check **Override Default Data Format** – select desired options



Custom formats  
are available



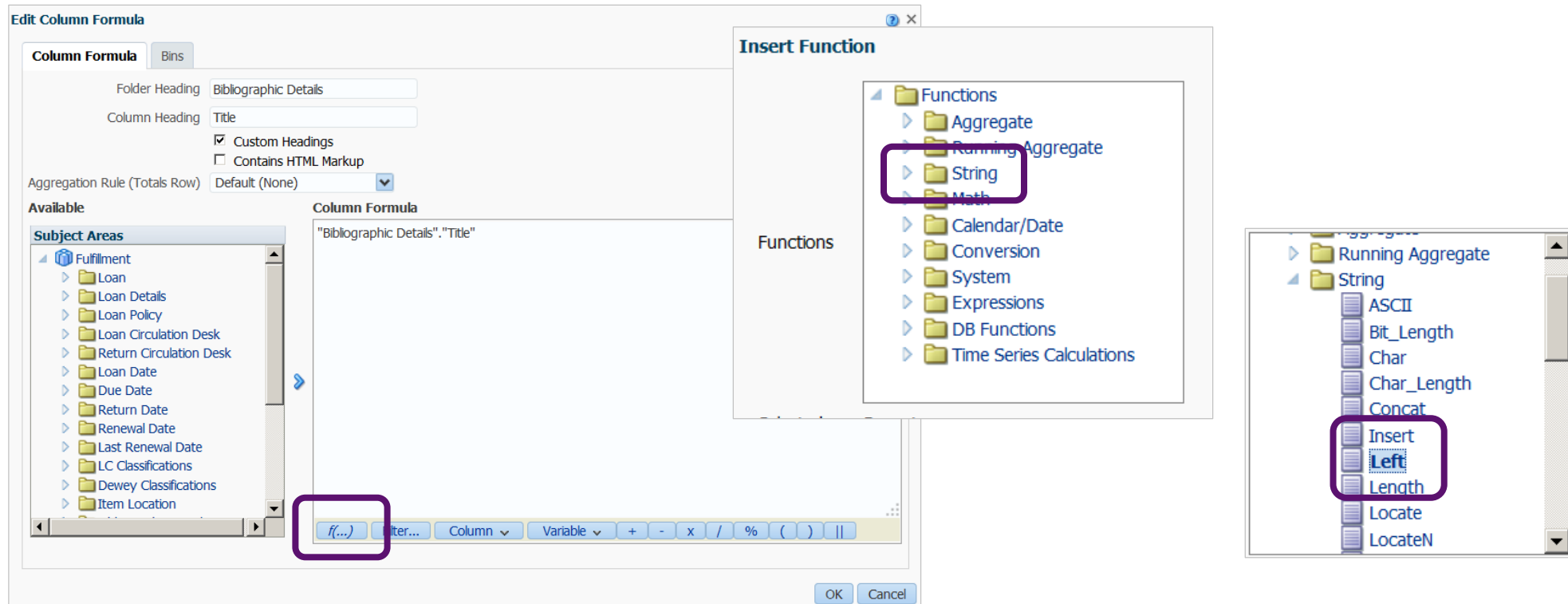
Revised custom  
date format:  
**yyyyMMdd**

Creation Date	Creation Date
7/17/2017 4:13:44 PM	20170717
7/17/2017 4:13:44 PM	20170717
7/17/2017 4:13:43 PM	20170717
7/17/2017 4:13:42 PM	20170717
7/18/2017 10:00:03 AM	20170718
7/18/2017 10:00:03 AM	20170718
7/19/2017 3:07:26 PM	20170719
7/19/2017 3:07:26 PM	20170719
8/2/2017 1:41:09 PM	20170802
8/2/2017 1:41:09 PM	20170802

# Formatting with string functions

String functions perform various character manipulations.

**Criteria tab – Edit Column Formula – Insert Function – String**



# String functions

LEFT returns a specified number of characters from the left of a string.

Syntax = LEFT(expression, integer)

LEFT("Bibliographic Details"."Title", 25)

Column Formula

Bins

Folder Heading

Bibliographic Details

Column Heading

Title - 1st 25 characters

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row)

Default (None)

Available

Subject Areas

Fulfillment

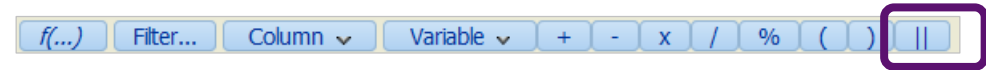
Column Formula

LEFT("Bibliographic Details"."Title", 25)

Title	Title - 1st 25 characters	Author
"Between your house and mine" : the letters of Lorine Niedecker to Cid Corman, 1960 to 1970 /	"Between your house and m	Niedecker, Lorine.
"Her kind" and the canon : Anne Sexton's erotic poetry and body politics /	"Her kind" and the canon	Nelson-Born, Katherine A., 1960
"To immerse myself in words" : text and music in selected choral works of Samuel Barber /	"To immerse myself in wor	Nally, Donald J.
\$30 writing school /	\$30 writing school /	Dean, Michael W. (Michael Ware
(Dis)forming the American canon : African-Arab slave narratives and the vernacular /	(Dis)forming the American	Judy, Ronald A. T., author.

# Concatenation

Concatenation combines two or more values into one, for example combining two columns or appending text to a column. **Tip:** use the `||` symbol provided at the bottom of the formula box as a shortcut.



Syntax: **expression || expression**

**"Bibliographic Details"."Author" || ' +++ ' || "Bibliographic Details"."Begin Publication Date"**

A screenshot of a 'Column Formula' dialog box. The 'Bins' tab is selected. Under 'Folder Heading', 'Bibliographic Details' is entered. Under 'Column Heading', 'Author plus pub date' is entered. There are checkboxes for 'Custom Headings' (checked) and 'Contains HTML Markup' (unchecked). The 'Aggregation Rule (Totals Row)' is set to 'Default (None)'. In the 'Available' section, 'Subject Areas' is listed. The 'Column Formula' text area contains the formula: `"Bibliographic Details"."Author" || ' +++ ' || "Bibliographic Details"."Begin Publication Date"`.

Note the difference between the use of ' and "

Title - 1st 25 characters	Author plus pub date	Loan Date
"Between your house and m	Niedecker, Lorine. +++ 1986	10/4/2017
"Her kind" and the canon	Nelson-Born, Katherine A., 1960- +++ 1998	5/9/2018
"To immerse myself in wor	Nally, Donald J. +++ 1995	11/6/2017

# More string functions

**RIGHT** – returns a specified number of characters from the right of a string.

**INSERT** – Inserts a specified string into a specific location in another string.

**LOWER** and **UPPER** – converts string to lower or upper case.

**TRIMBOTH**, **TRIMLEADING**, or **TRIMTRAILING** - Trims specified characters from the front and/or back of a string.

**REPLACE** – replaces a specified character or string with another character or string.

# Bins

Bins are used to group results contained in a column into your desired categories.

Title					
Items in library at least 5 years and never loaned in last 5 years (tc version)					
Table					
Library Name	Location Name	Title (first 60 characters)	Barcode	Permanent Call Number	Last Loan Date
GSU Library (Atlanta Campus)	ATL Folio	"Wunderkind"-Sonaten. für Klavier und Violine (mit Violoncello)	30785020843306	Fol. M219 .M69 K. 10-15 2012	
		"Wunderkind"-Sonaten. für Klavier und Violine : KV 26-31 =	30785020843314	Fol. M219 .M69 K. 10-15 2012	
		"Wunderkind"-Sonaten. für Klavier und Violine : KV 26-31 =	30785020843322	Fol. M219 .M69 K. 26-31 2012	
		"Wunderkind"-Sonaten. für Klavier und Violine : KV 26-31 =	30785020843330	Fol. M219 .M69 K. 26-31 2012	
		"Wunderkind"-Sonaten. für Klavier und Violine : KV 6-9 = "W	30785020843280	Fol. M219 .M69 K. 6-9 2012	
		"Wunderkind"-Sonaten. für Klavier und Violine : KV 6-9 = "W	30785020843298	Fol. M219 .M69 K. 6-9 2012	
		--The serpent-snapping eye : trumpet, percussion, piano, and	30785015758816	Fol. M447.R49 S5 1980	5/7/2008 6:59:00 AM
		--denn die Liebe ist stärker als der Tod : (Moment i (k) au	30785020798138	Fol. M1531.S86 D46 2008	
		1. Sonate op. 12 für Klavier /	30785018428235	Fol. M23 .S56 op. 12 1960	
		10 études latino-américaines pour flûte et piano /	30785020749750	Fol. M242.A77 E88 2004	
		10 études latino-américaines pour flûte et piano.	30785020749768	Fol. M242.A77 E88 2004	
		10 études latino-américaines pour flûte et piano.	30785020749776	Fol. M242.A77 E882 2008	
		10 études latino-américaines pour flûte et piano.	30785020749784	Fol. M242.A77 E882 2008	
		12 American preludes (doce preludios americanos) for piano.	30785017800756	Fol. M25.G48 T8 1946	12/2/2010 5:59:00 AM
		13e [i.e. Treizième] nocturne pour le piano : op. 119 /	30785016351587	Fol. M25 .F38 op. 119, 1957	
		17 divertimenti : for various instruments : from the Breitko	30785015783855	Fol. M178.M69 D6 1979	10/2/2006 6:59:00 AM
		1812 overture ; Marche slave, and ; Francesca da Rimini /	30785015784150	Fol. M1000.T4 O74 1996	
		1900 : art at the crossroads /	30785015637200	Fol. N6488.G7 L6765 2000	12/6/2002 5:59:00 AM
		1944 [i.e. i.e. Ezerkilencsáznegyvennegy] : oratorio sulla	30785019114065	Fol. M1531.R211 E9 1970	
		1er [i.e. Première] intermezzo : en ut majeur /	30785018474023	Fol. M25.P68 I5 no. 1, 1986	4/9/2012 6:59:00 AM
		2 sonatas : for descant recorder (violin) and basso continuo	30785015822042	Fol. M271.R4 M57 no. 1, 1998	
			30785015822109	Fol. M271.R4 M57 no. 1, 1998	5/8/2003 6:59:00 AM

# Bins

## Edit Column Formula – Bins – Add Bin

Then add each bin as you  
would a filter.

Provide a name for them  
when prompted.

**Edit Bin Name** [X]

OK Cancel

**Edit Column Formula** [?] [X]

Column Formula **Bins**

1.	Last Loan Date is null	Never circulated	
2.	Last Loan Date is between 01/01/2008 12:00:00 AM and 12/31/2013 12:00:00 AM	5-10 years ago	
3.			
4.	All other values		

**New Filter** [?] [X]

Column Last Loan Date

Operator is between

Value

Value

Add More Options Clear All

☐ Protect Filter

☐ Convert this filter to SQL

OK Cancel

**Add Bin** Clear All

OK Cancel

# Bins

Items in library at least 5 years and never loaned in last 5 years (tc version)

Bin Categories

Edit Column Formula

Column Formula

Bins

1.	Last Loan Date is between 01/01/2009 12:00:00 AM and 12/31/2014 12:00:00 AM	5-10 years ago	
2.	Last Loan Date is between 01/01/2004 12:00:00 AM and 12/31/2008 12:00:00 AM	10-15 years ago	
3.	Last Loan Date is null	Never circulated	
4.	All other values	A really long time ago	

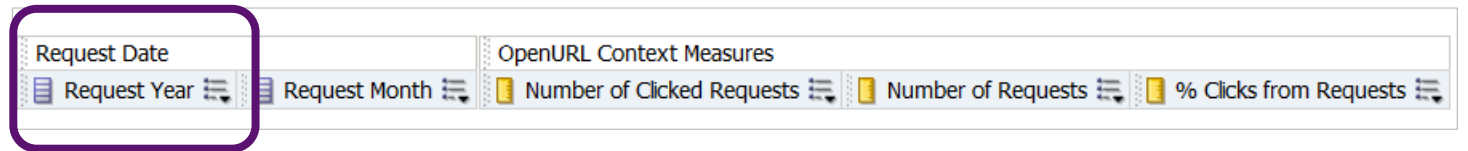
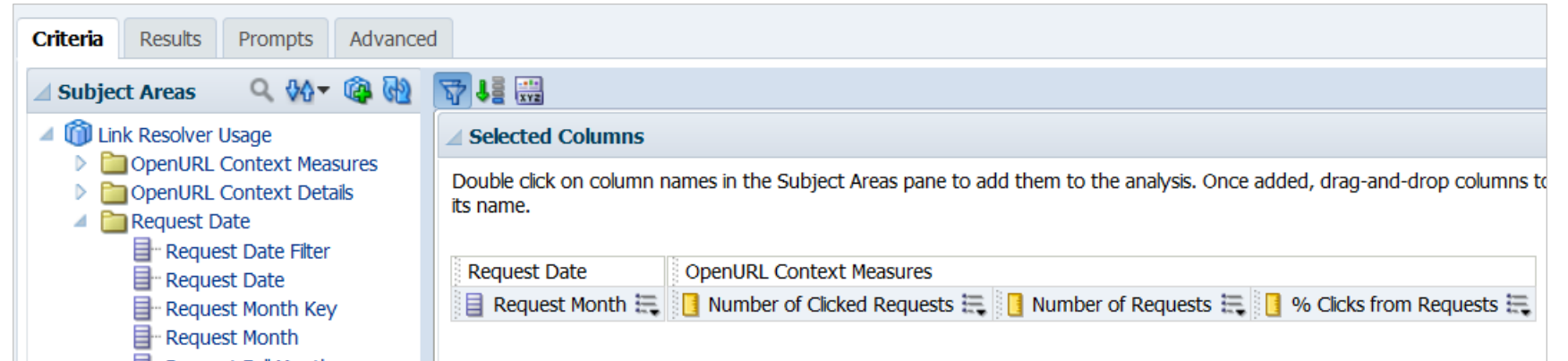
There is a catch-all bin for all other values not categorized.

Library Name	Location Name	Title (first 60 characters)	Barcode	Permanent Call Number	Last Loan Date
GSU Library (Atlanta Campus)	ATL Folio	"Wunderkind"-Sonaten. für Klavier und Violine (mit Violoncello)	30785020843306	Fol. M219 .M69 K. 10-15 2012	Never circulated
			30785020843314	Fol. M219 .M69 K. 10-15 2012	Never circulated
		-Sonaten. für Klavier und Violine : KV	30785020843322	Fol. M219 .M69 K. 26-31 2012	Never circulated
		-Sonaten. für Klavier und Violine : KV	30785020843330	Fol. M219 .M69 K. 26-31 2012	Never circulated
		-Sonaten. für Klavier und Violine : KV	30785020843280	Fol. M219 .M69 K. 6-9 2012	Never circulated
		-Sonaten. für Klavier und Violine : KV	30785020843298	Fol. M219 .M69 K. 6-9 2012	Never circulated
		snapping eye : trumpet, percussion,	30785015758816	Fol. M447.R49 S5 1980	10-15 years ago
		de ist stärker als der Tod : (Moment i	30785020798138	Fol. M1531.S86 D46 2008	Never circulated
		12 für Klavier /	30785018428235	Fol. M23 .S56 op. 12 1960	Never circulated
		no-américaines pour flûte et piano /	30785020749750	Fol. M242.A77 E88 2004	Never circulated
		no-américaines pour flûte et piano.	30785020749768	Fol. M242.A77 E88 2004	Never circulated
		no-américaines pour flûte et piano.	30785020749776	Fol. M242.A77 E882 2008	Never circulated
		preludes (doce preludios americanos)	30785020749784	Fol. M242.A77 E882 2008	Never circulated
			30785017800756	Fol. M25.G48 T8 1946	5-10 years ago
		ème] nocturne pour le piano : op. 119	30785016351587	Fol. M25 .F38 op. 119, 1957	Never circulated
		nocturne pour le piano : op. 119	30785015783855	Fol. M178.M69 D6 1979	10-15 years ago
		Breitko			
		1812 overture ; Marche slave, and ; Francesca da Rimini /	30785015784150	Fol. M1000.T4 O74 1996	Never circulated
		1900 : art at the crossroads /	30785015637200	Fol. N6488.G7 L6765 2000	A really long time ago



# Reordering columns

I'm creating a link resolver report, and have added a new column – I dragged it to the location where I wanted it on the left.



But when I preview in the **Results** tab, the order is not what I wanted.

Request Month	Number of Clicked Requests	Number of Requests	% Clicks from Requests	Request Year
July	8,114	23,282	34.85%	2017
August	6,602	18,181	36.31%	2017
September	8,916	31,455	28.35%	2017

# Reordering columns

Column order is set on the **Results** tab by dragging and dropping. (It may look like you have some control on the Criteria tab, but that's mostly an optical illusion.)

Many important design functions are controlled in the Compound Layout of Results view.

Compound Layout

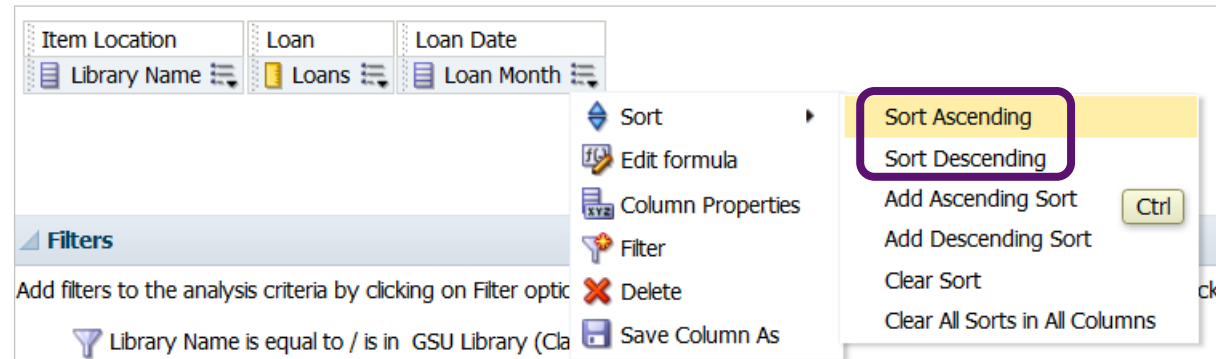
Title				
Link resolver requests by month				
Table				
Request Year	Request Month	Number of Clicked Requests	Number of Requests	% Clicks from Requests
2017	May	827	3,067	26.96%
	June	6,773	19,652	34.46%
	July	8,114	23,282	34.85%
	August	6,602	18,181	36.31%
	September	8,916	31,455	28.35%
	October	11,211	36,167	31.00%
	November	10,820	47,721	22.67%
	December	5,468	34,548	15.83%
2018	January	9,129	39,333	23.21%
	February	10,903	74,387	14.66%
	March	9,940	65,219	15.24%
	April	10,816	45,279	23.89%
	May	2,429	12,729	19.08%

# Sorting tips

Problem: This query built from the Fulfillment subject area sorts the months alphabetically by default. The only sorting choices for Loan Month are ascending and descending.

**Clarkston Circulation 2018**

Library Name	Loans	Loan Month
GSU Library (Clarkston Campus)	2,067	April
GSU Library (Clarkston Campus)	1,783	February
GSU Library (Clarkston Campus)	1,450	January
GSU Library (Clarkston Campus)	1,537	March
GSU Library (Clarkston Campus)	280	May



# Sorting tips

Solution: Add the column **Loan Month Key** (or Loan Fiscal Month Key) to the report, and sort on that column. Then hide this column from the results.

**Subject Areas**

- Loan Policy
- Loan Circulation Desk
- Return Circulation Desk
- Loan Date
  - Loan Time
  - Loan Date
  - Loan Month Key**
  - Loan Month
  - Loan Year
  - Loan Fiscal Month Key
  - Loan Fiscal Year
  - Loan Full Month
  - Loan Quarter
  - Loan Date Filter
  - Loan Date
- Due Date
- Return Date

**Compound Layout**

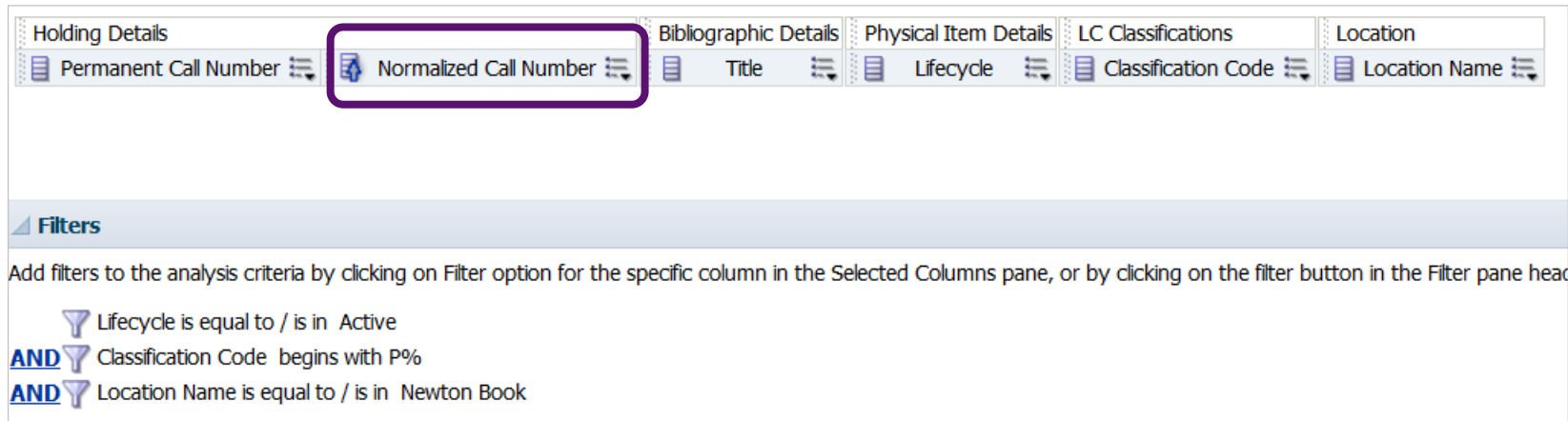
Title: Clarkston Circulation 2018

Table

Library Name	Loans	Loan Month	Loan Month Key
GSU Library (Clarkston Campus)	1,450	January	1
GSU Library (Clarkston Campus)	1,783	February	2
GSU Library (Clarkston Campus)	1,537	March	3
GSU Library (Clarkston Campus)	2,067	April	4
GSU Library (Clarkston Campus)	280	May	5

# Sorting tips

To solve a similar issue where the Permanent Call Number field doesn't properly sort, also include **Normalized Call Number** in your analysis. Then alphabetically sort and hide this column.



The screenshot displays a library catalog interface with a table of columns and a filters section. The columns are organized into tabs: Holding Details, Bibliographic Details, Physical Item Details, LC Classifications, and Location. The 'Normalized Call Number' column is highlighted with a purple box. Below the columns is a 'Filters' section with a list of active filters.

Holding Details	Bibliographic Details	Physical Item Details	LC Classifications	Location	
Permanent Call Number	Normalized Call Number	Title	Lifecycle	Classification Code	Location Name

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header.

- Lifecycle is equal to / is in Active
- AND** Classification Code begins with P%
- AND** Location Name is equal to / is in Newton Book

# Another sort problem

This is a modification of the out of box report **Count of Items Loaned**. In addition to applying some filters, I added the **Loan Month** dimension. Again, the months are sorting alphabetically.

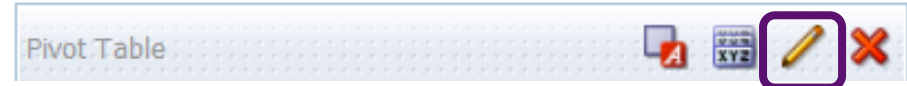
But, adding the **Loan Month Key** column with an ascending sort in the **Criteria** tab does not fix the problem in the **Pivot Table View**.

Location Name	Loans				
	2018	2018	2018	2018	2018
	April	February	January	March	May
Decatur Audiobook CD			1		
Decatur Book	218	154	194	208	29
Decatur Browsing	20	21	9	34	7
Decatur Equipment	424			2	12
Decatur Popular DVD	6	13	14	13	3
Decatur Reserve	65	464	237	340	1
Decatur Youth	2				
<b>Grand Total</b>	<b>735</b>	<b>652</b>	<b>455</b>	<b>597</b>	<b>52</b>

Location Name	Loans				
	2018	2018	2018	2018	2018
	April	February	January	March	May
Decatur Audiobook CD	4	2	1	3	5
Decatur Book	218	154	194	208	29
Decatur Browsing	20	21	9	34	7
Decatur Equipment	424			2	12
Decatur Popular DVD	6	13	14	13	3
Decatur Reserve	65	464	237	340	1
Decatur Youth	2				
<b>Grand Total</b>	<b>735</b>	<b>652</b>	<b>455</b>	<b>597</b>	<b>52</b>

# Editing the pivot table

You also need to edit the pivot table layout.



**Layout**

**Pivot Table**

The order of the columns matters. Reverse positions of Loan Month and Loan Month key, then the ascending sort of Loan Month Key will be recognized.

**Columns**

Measure Labels	
	Year
Loan Date	Loan Month
	Loan Month Key

**Rows**

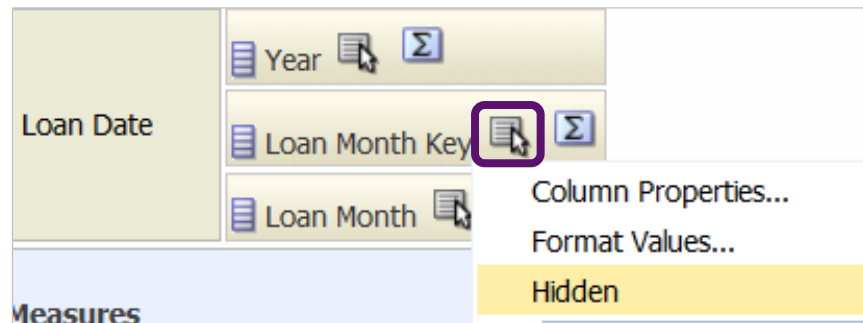
Item Location
Location Name

**Measures**

Loan
Loans

# Editing the pivot table

Then you can hide the **Loan Month Key** column from the pivot table and the problem is solved.



	Loans				
	2018	2018	2018	2018	2018
Location Name	January	February	March	April	May
Decatur Audiobook CD	1				
Decatur Book	194	154	208	218	29
Decatur Browsing	9	21	34	20	7
Decatur Equipment			2	424	12
Decatur Popular DVD	14	13	13	6	3
Decatur Reserve	237	464	340	65	1
Decatur Youth				2	
<b>Grand Total</b>	<b>455</b>	<b>652</b>	<b>597</b>	<b>735</b>	<b>52</b>



# Sectioned Tables


Location Name	Loan Month	Loans
Decatur Audiobook CD	January	1
Decatur Book	January	194
Decatur Browsing	January	9
Decatur Popular DVD	January	14
Decatur Reserve	January	237
Decatur Book	February	154
Decatur Browsing	February	21
Decatur Popular DVD	February	13
Decatur Reserve	February	464
Decatur Book	March	208
Decatur Browsing	March	34
Decatur Equipment	March	2
Decatur Popular DVD	March	13
Decatur Reserve	March	340
Decatur Book	April	218
Decatur Browsing	April	20
Decatur Equipment	April	424
Decatur Popular DVD	April	6
Decatur Reserve	April	65
Decatur Youth	April	2
Decatur Book	May	34
Decatur Browsing	May	8
Decatur Equipment	May	12
Decatur Popular DVD	May	6
Decatur Reserve	May	1



Decatur Book		
Loans	Loan Month	
194	January	
154	February	
208	March	
218	April	
34	May	



  




Decatur Browsing		
Loans	Loan Month	
9	January	
21	February	
34	March	
20	April	
8	May	









While editing Table Layout -  drag and drop a column into the **Sections** field. This creates separate “mini” tables – one for each value in the column.

### Layout

Drag/drop measures, columns and hierarchies to determine table layout.

**Table Prompts**    
Drop here for Table prompts

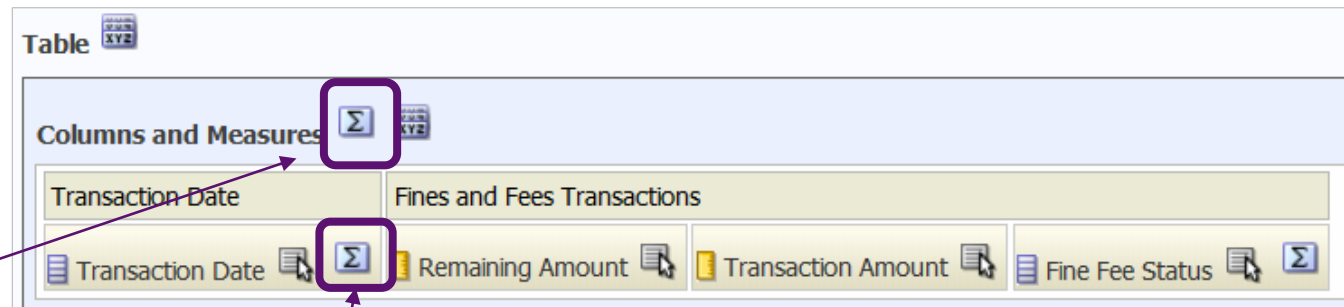
**Sections**    
Item Location  
Location Name 

**Table**   
Columns and Measures    
Loan    Loan Date  
Loans     Loan Month Key      Loan Month  

# Table formatting

Several format options for tables are located in the Table Layout view in the **Columns and Measures** area.

Use the **Sum** ( $\Sigma$ ) buttons to add totals to columns.



The general Sum button adds totals to the bottom of columns with measures.

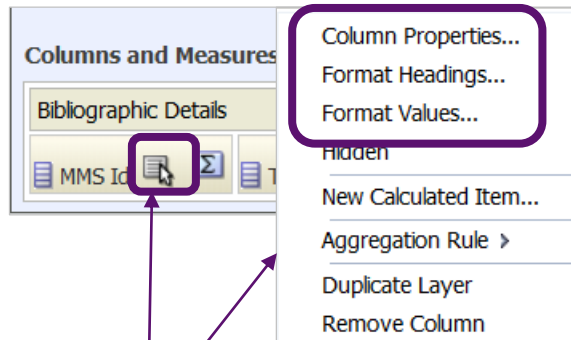
Transaction Date	Transaction Amount
5/2/2018	5.00
5/7/2018	5.00
	116.00
5/10/2018	1,360.00
5/11/2018	25.00
5/14/2018	5.00
5/15/2018	19.00
<b>Grand Total</b>	<b>1,535.00</b>

Sum buttons in a non-measure column add totals for each value in the column.

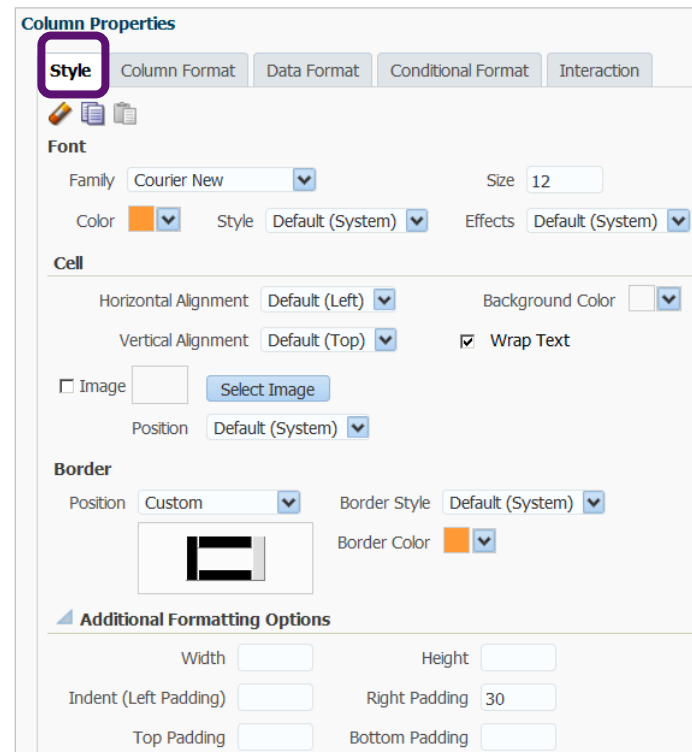
Transaction Date	Transaction Amount
5/2/2018	5.00
<b>5/2/2018 Total</b>	<b>5.00</b>
5/7/2018	5.00
	116.00
<b>5/7/2018 Total</b>	<b>121.00</b>
5/10/2018	1,360.00
<b>5/10/2018 Total</b>	<b>1,360.00</b>

# Table formatting

**More Options** is another important formatting button under **Columns and Measures**. General stylistic changes are found on the **Style** tab.



More Options icon & menu

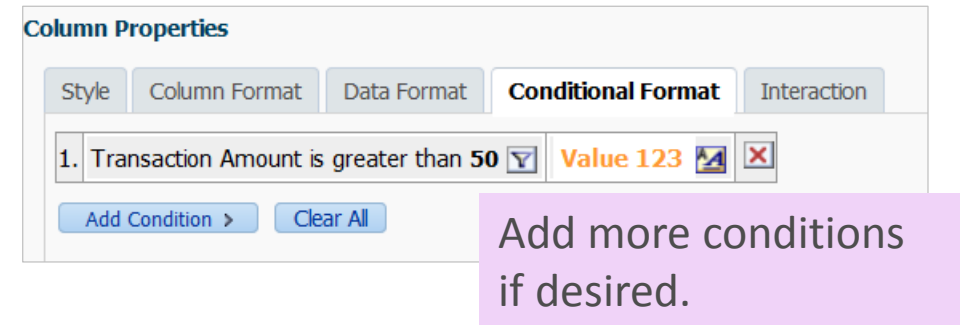
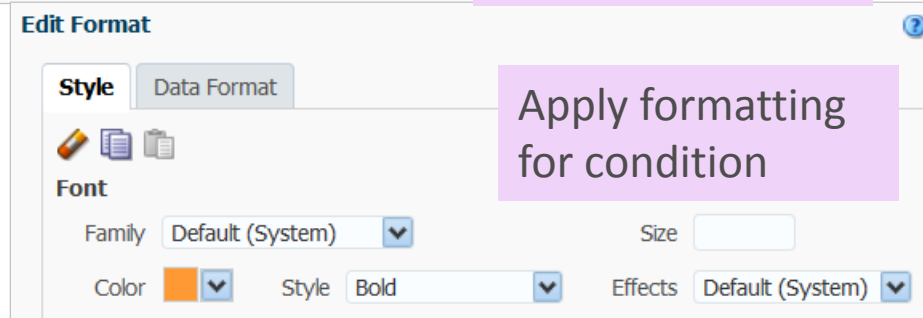
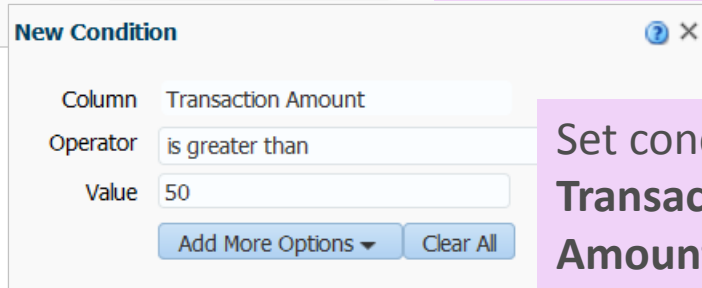
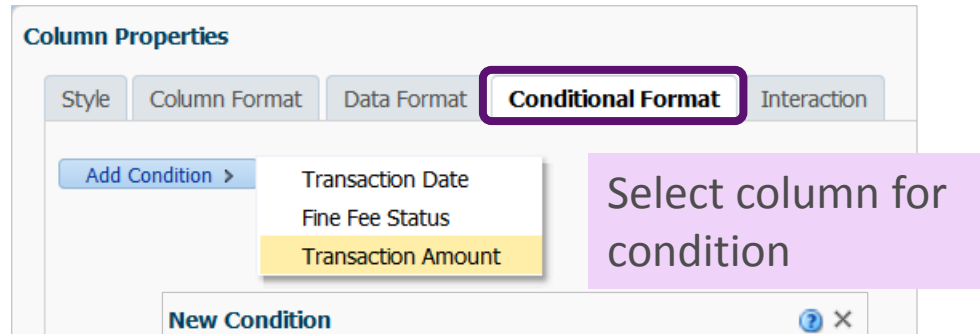


Changes in **Column Properties** and **Format Headings** to alter font, border, and cell padding in the MMS Id column are reflected in the table below.

MMS Id	Title
9934395951902952	Inequalities and extremal problems in probability a
9934395952002952	Imaging in stem cell transplant and cell-based ther
9934395952402952	Animal locomotion : physical principles and adapta
9934395952602952	Bioinformatics research and applications : 13th Int
9934396044402952	Protein analysis using mass spectrometry : accele
9934396044902952	Terrestrial depositional systems : deciphering com

# Conditional formatting

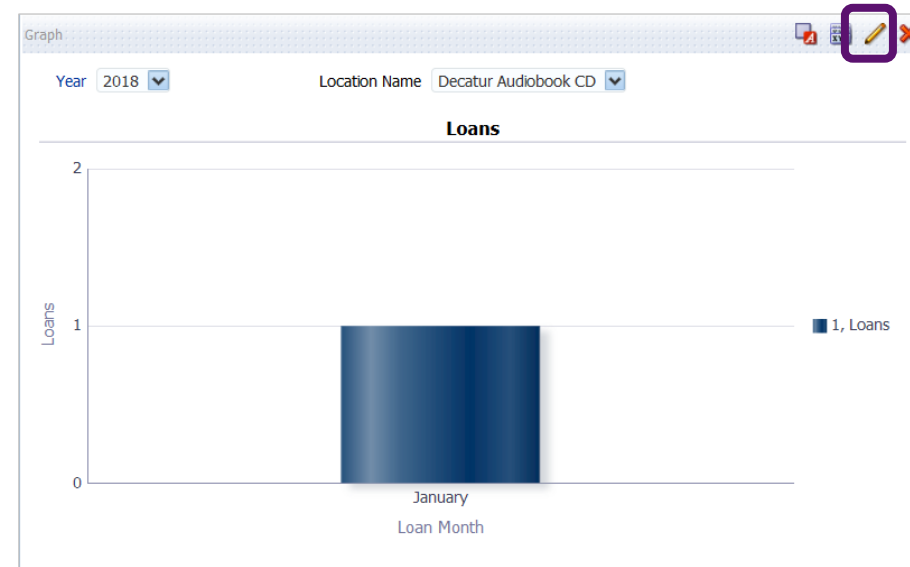
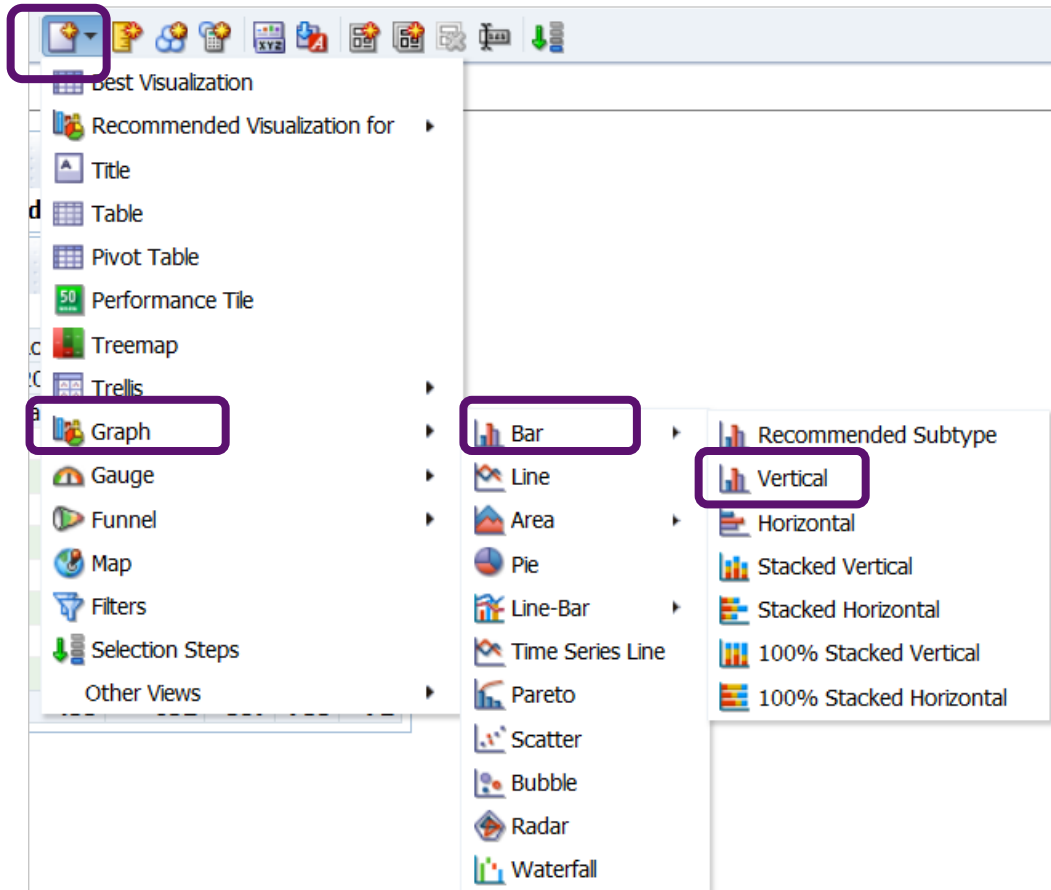
Use the **Conditional Format** tab to apply special formatting to specific conditions.



Transaction Date	Transaction Amount
5/2/2018	5.00
5/7/2018	5.00
	116.00
5/10/2018	1,360.00
5/11/2018	25.00
5/14/2018	5.00
5/15/2018	19.00

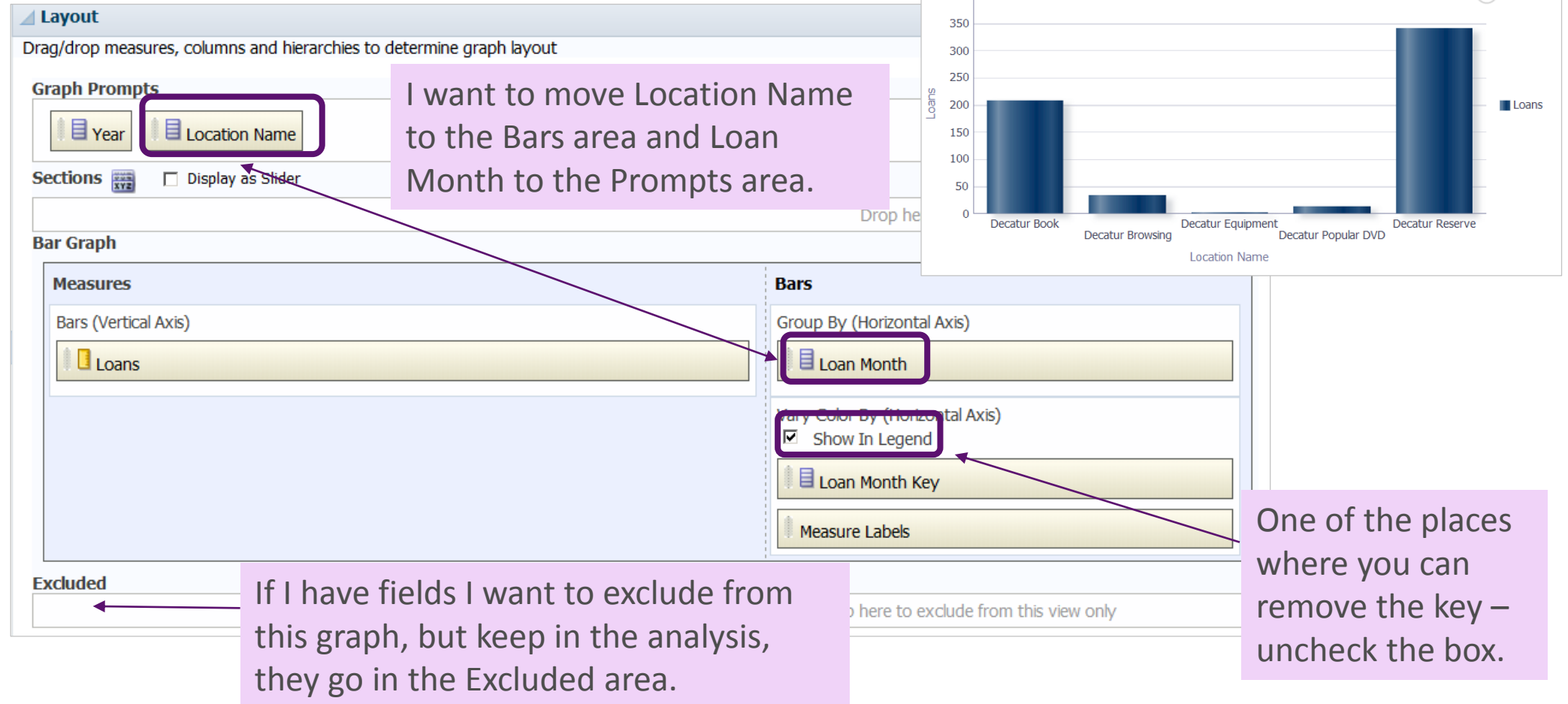
# Adding graphs and charts

Add charts and graphs by using **New View** on the **Results** tab.



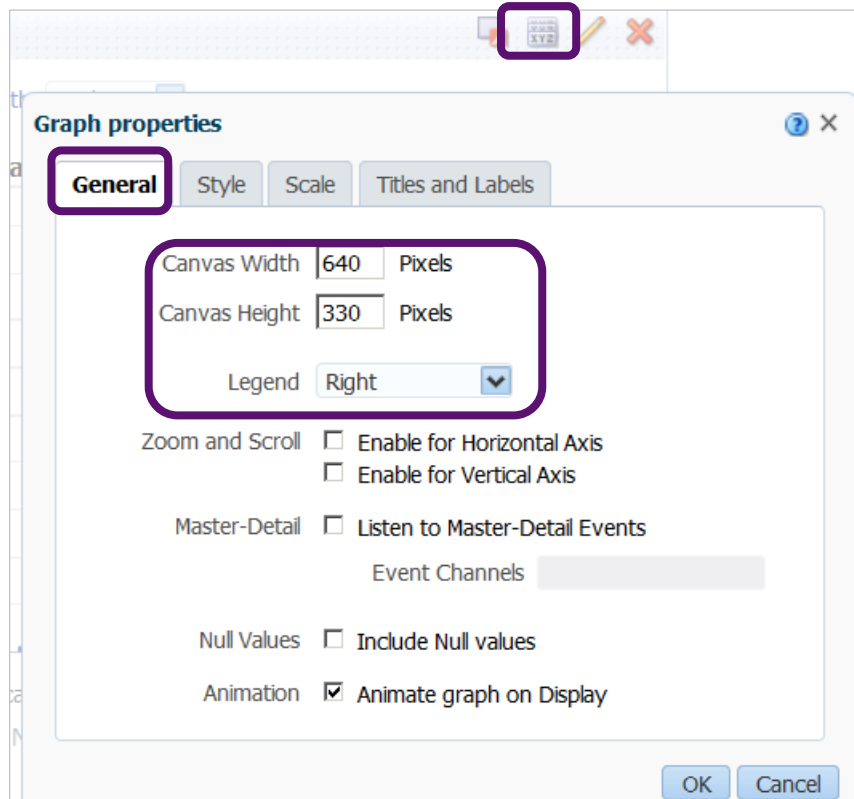
What initially appears might not be what you had in mind. Use the **pencil** to edit. For example, I want the user to choose the month, and for locations to appear on the horizontal axis.

# Graphs



# Graphs

Other edits are made using the tabs under **View Properties**. The tabs are contextual, so will relate to the chart you are editing.

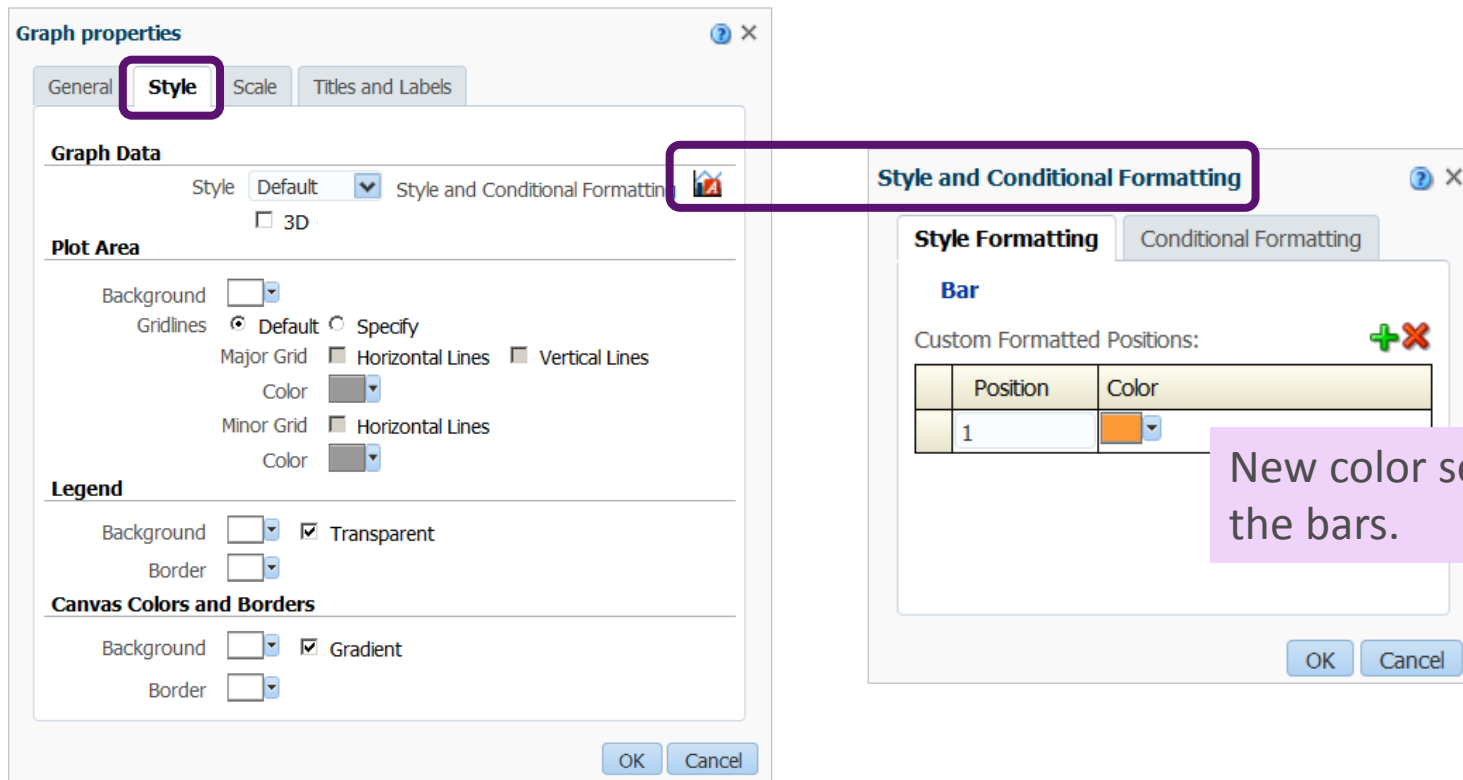


Use the **General** tab to change the canvas size of the chart.

This is where you reposition the legend, and another place where you can turn it off.

# Graphs

The **Style** tab contains options such as changing the colors of the bars or configuring grid lines.



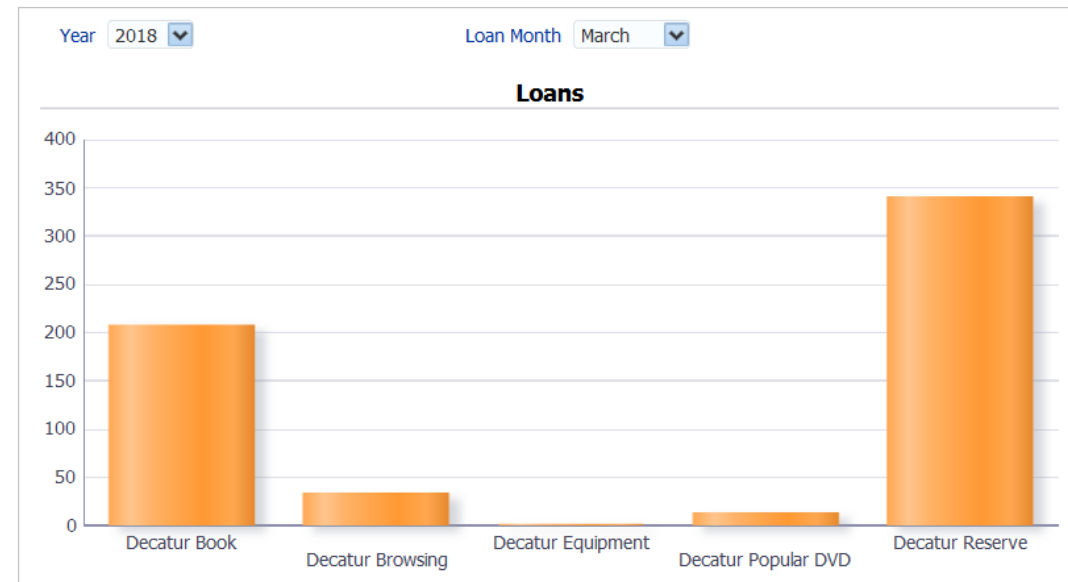


# Graphs

The **Titles and Labels** tab lets you choose if you want to display these things and to format them if you do. For example, you can set data markers to always display instead of just on rollover (default setting).

The screenshot shows the 'Graph properties' dialog box with the 'Titles and Labels' tab selected. The 'Graph Title' section has 'Loans' entered in the title field, with a checked box for 'Use measure name as graph title'. The 'Axis titles' section has empty fields for 'Vertical Axis' and 'Horizontal Axis', with unchecked boxes for 'Use measure name as axis title' and 'Use column name as axis title'. The 'Labels' section has checkboxes for 'Legend', 'Vertical Axis Labels', 'Horizontal Axis Labels', and 'Data Markers', all of which are currently unchecked. The dialog has 'OK' and 'Cancel' buttons at the bottom.

Section	Property	Value / Setting
Graph Title	Title	Loans
	Use measure name as graph title	Checked
Axis titles	Vertical Axis	
	Use measure name as axis title	Unchecked
Axis titles	Horizontal Axis	
	Use column name as axis title	Unchecked
Labels	Legend	Unchecked
	Vertical Axis Labels	Unchecked
	Horizontal Axis Labels	Unchecked
	Data Markers	Unchecked

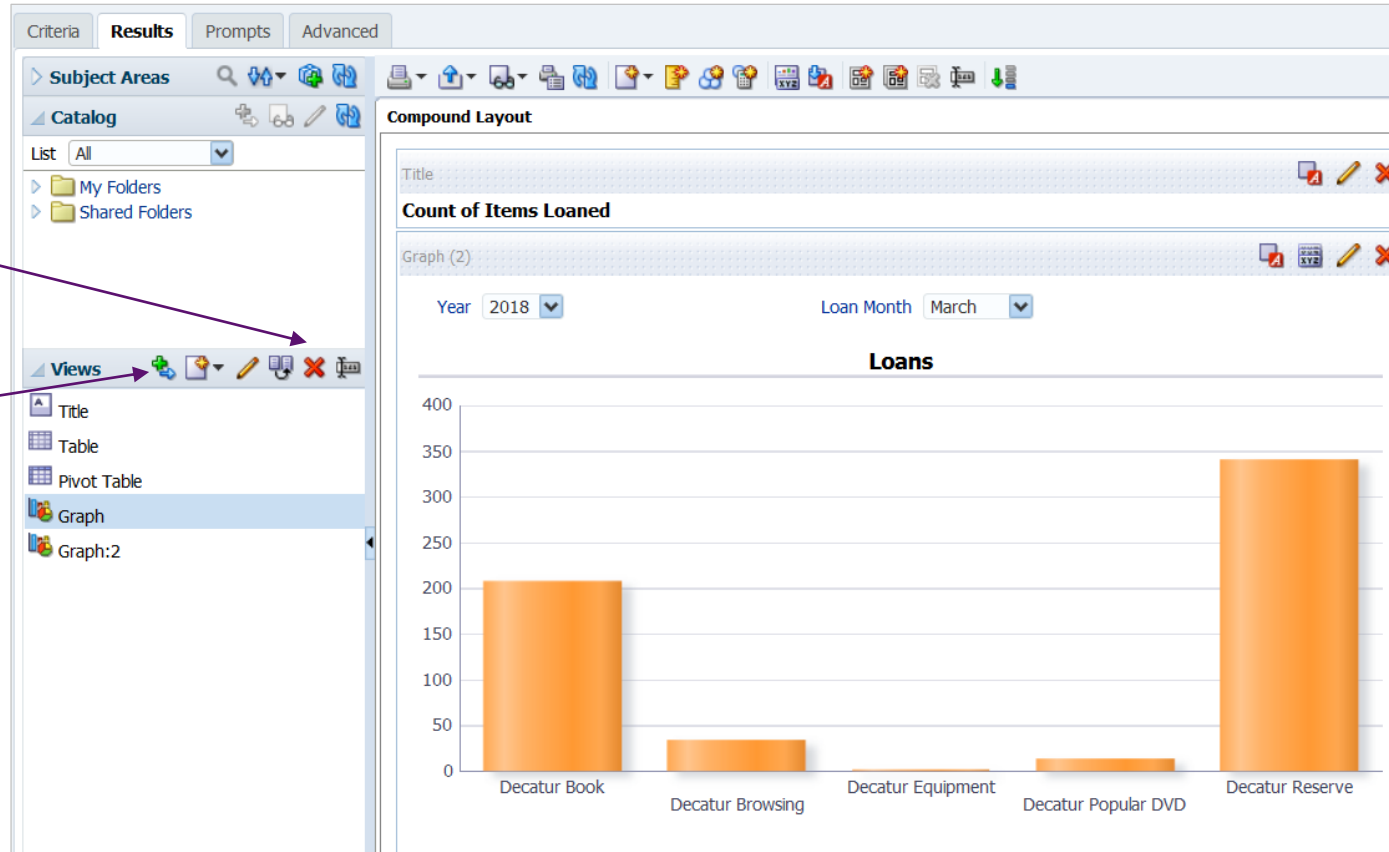


Revised chart with new bar colors and no axis titles or key.

# Removing views

This **X** will remove the selected View from the analysis.

If the selected View is hidden from the Compound Layout, the **Add View** icon is green and enabled, so you can add it back in. If the View is already visible, the icon is grey.



This **X** will remove the View from the Compound Layout, but will keep it in the analysis.

# Prompts

You can allow users to select filters when they run a report by adding prompts: Select **New Prompt** in the Definition area of the **Prompts** tab.

The screenshot shows the 'Prompts' tab in the Alma Analytics interface. The 'Definition' section is active, displaying a table with columns 'Prompt Label', 'Type', and 'Prompt'. The first row shows 'Page 1' under 'Prompt Label' and 'Page' under 'Type'. A purple box highlights the 'New Prompt' button (a green plus icon) in the top right corner. A dropdown menu is open, showing options: 'Column Prompt', 'Variable Prompt', and 'Image Prompt'. A yellow box highlights the 'Column Prompt' option. A purple callout box with arrows pointing to the table columns contains the text: 'These fields are already in the analysis.' and 'Click here to select from one that isn't.' pointing to the 'Prompt' column.

Prompt Label	Type	Prompt
Page 1	Page	

These fields are already in the analysis.

Click here to select from one that isn't.

New Prompt

- Column Prompt
- Variable Prompt
- Image Prompt

Request Month  
Request Year  
Number of Clicked Requests  
Number of Requests  
% Clicks from Requests  
More Columns ...

A Column Prompt lets users select a value from a column (either visible or not) that exists within the Alma Analytics subject area(s) you are using.

# Prompts

**New Prompt:**

Prompt For Column: "Request Date"."Request Year"

Label: Request Year

☐ Custom Label

Description:

Operator: is equal to / is in

User Input: Choice List

**Options**

- Text Field
- Choice List
- Check Boxes**
- Radio Buttons
- List Box (Ctrl)

OK Cancel

## Prompt choices:

**Text Field** – requires user to enter a single value

**Choice List** – select one or more values from a drop-down menu

**Check Boxes** – select one or more values from a list


**Radio Buttons** – select a single value

**List Box** – allows user to make a single or multiple selections using SHIFT and CTRL; very flexible and configurable

# Prompts

**Setting which choices appear:** Initially the check boxes for Request Year include all the years the system can see – way too many for the report being designed. To adjust this, select the prompt in the **Definition** section and click the **pencil** to edit.

**Display**







Page 1 

Request Year

- ☐ 1988
- ☐ 1989
- ☐ 1990
- ☐ 1991
- ☐ 1992
- ☐ 1993
- ☐ 1994
- ☐ 1995
- ☐ 1996
- ☐ 1997
- ☐ 1998
- ☐ 1999
- ☐ 2000
- ☐ 2001


**Definition**

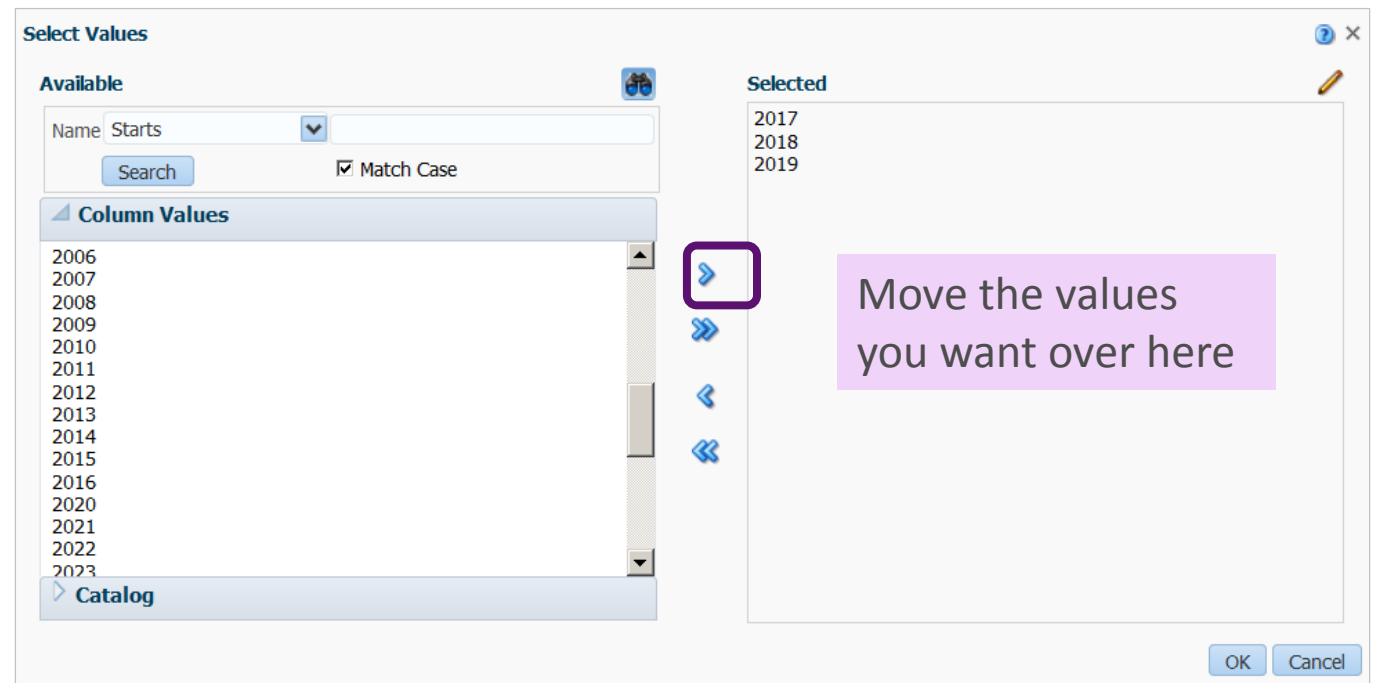
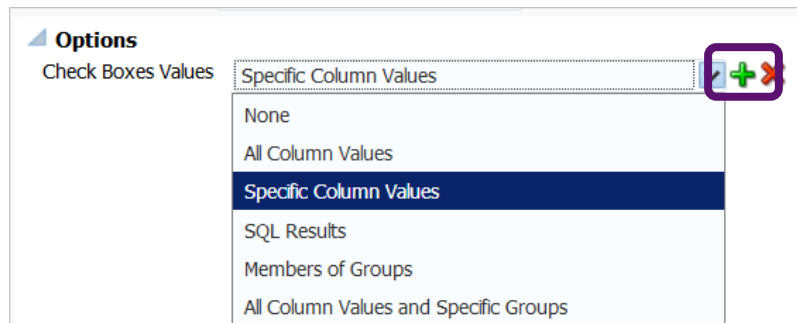
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Request Year	Column value	Request Year			<input type="checkbox"/>

# Prompts

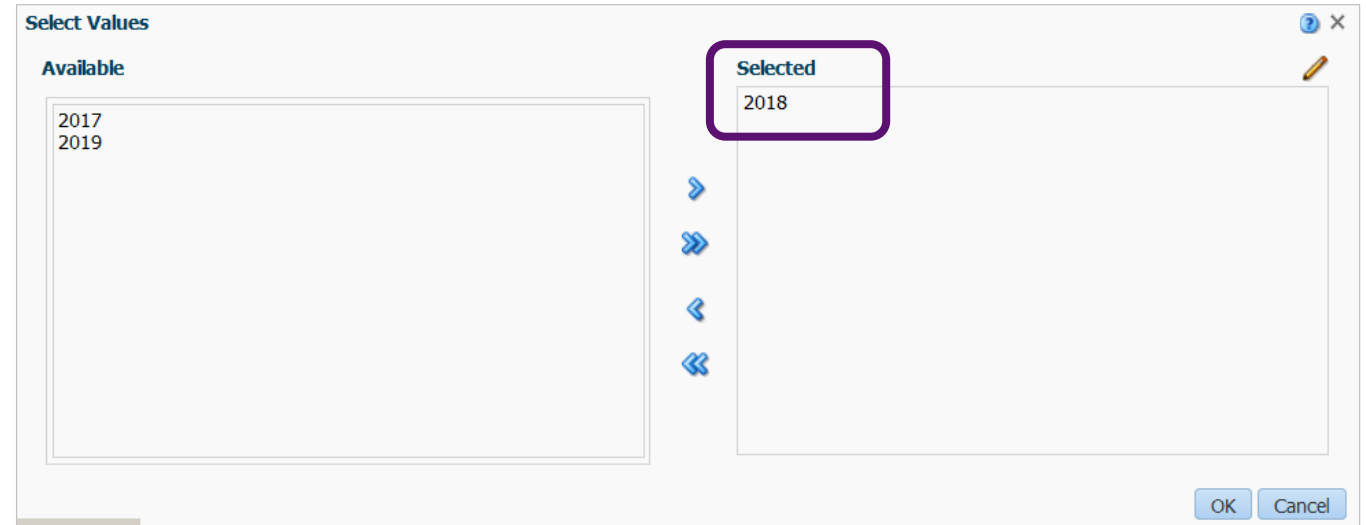
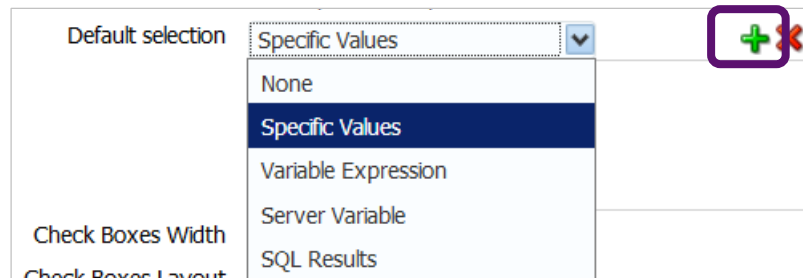
Expand the **Options** under Edit Prompt. Under **Check Boxes Values**, select **Specific Column Values**. Use  to add values.



# Prompts

Selecting a default choice for the user:

This is also under **Edit Prompt – Options**. Under **Default Selection** choose **Specific Values**. Then add your selection.



# Prompts

The finished prompt is a manageable list, with the most probable selection already made.

**Link resolver requests by month**

Request Year ☐ 2017 ☒ 2018 ☐ 2019

 **Link resolver requests by month** | Last Modified 5/14/2018  
example for Gugm 2018  
[Open](#) [Edit](#) | [More ▼](#)

Remember to use “Open” instead of “Edit” in Analytics if you want to view/select the prompts.



???'s

**Opening image:** Boo in Soda Box, by elorgwhee, <https://www.flickr.com/photos/elorg/2196371990>, (CC BY-NC-ND 2.0)