

Saving an Analytics Report When Using a Pre-existing Report

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Please open Analytics and follow along with the slides.

Navigate to the folder that contains the report

The screenshot shows a file explorer window titled 'Catalog'. The address bar indicates the location is '/Shared Folders/Community/Reports/Orbis Cascade Alliance'. The left pane shows a tree view of folders, with 'Circulation & Resource Sharing' selected. The right pane displays a list of reports, including '30 Days Overdue', 'AAR list', 'borrowing em', 'BORROWING REQUESTS Apr 2016', 'Items overdue more than 30 day_Internal', and 'Items overdue more than 30 day_Patrons'. A red arrow points from a yellow text box at the bottom left to the 'Circulation & Resource Sharing' folder. Another yellow text box highlights the report 'BORROWING REQUESTS Apr 2016'.

Path: Shared folders > Community > Reports > Orbis Cascade Alliance

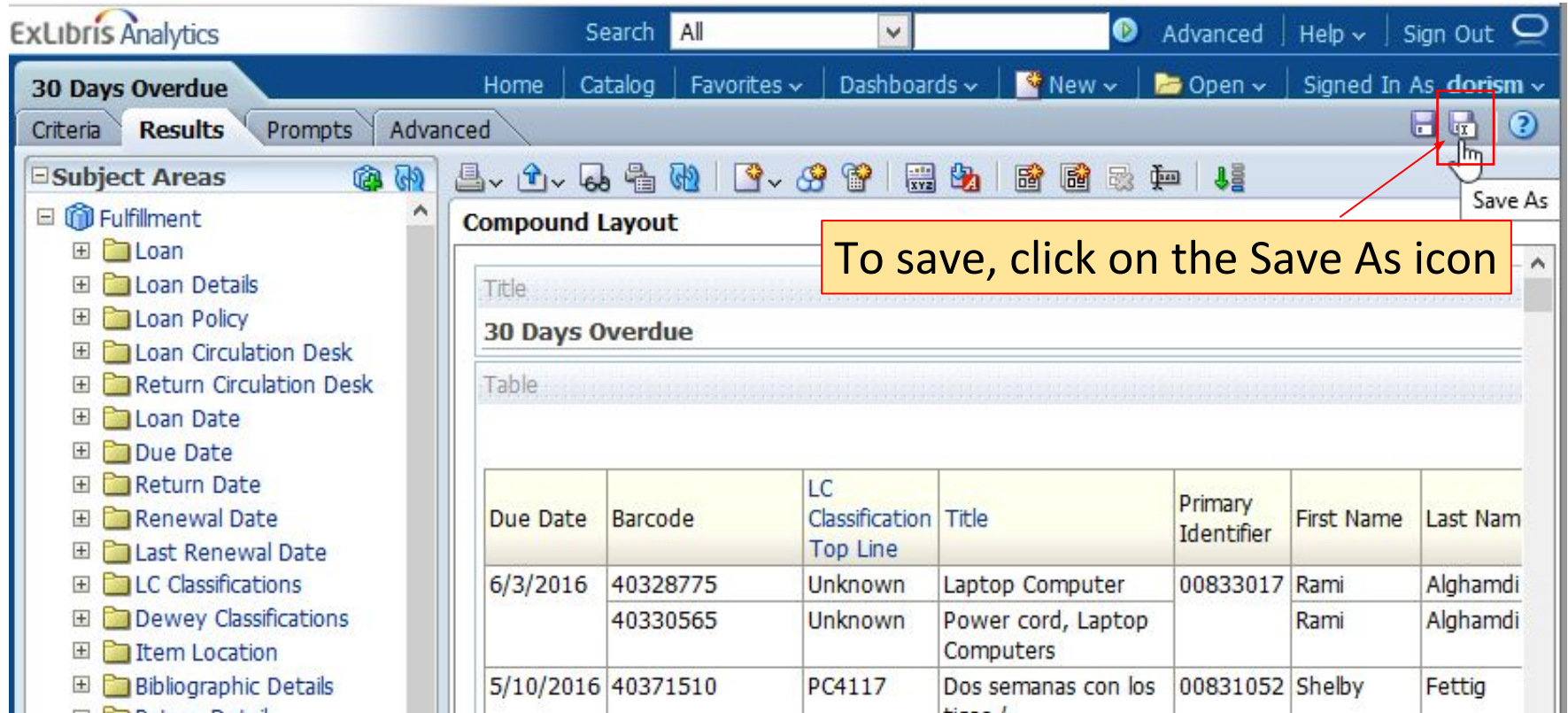
We're using a report in the OCA community folder

Select the report you would like to use

The screenshot shows a Windows File Explorer window titled 'Catalog' with the address bar showing the path: /Shared Folders/Community/Reports/Orbis Cascade Allian. The left pane shows a tree view of folders, including 'Orbis Cascade Alliance' and 'Circulation & Resource Shar'. The right pane displays a list of reports with columns for 'Type', 'Name', and 'Sort'. The '30 Days Overdue' report is highlighted with a red box. A yellow callout box points to the 'Edit' link of this report with the text: '30 Days Overdue-- Circulation often needs this report, so we'll work with it Click on Edit'.

Type	Name	Sort
Report	30 Days Overdue Last Modified 5/20/2016 10:31:40 AM Owr	Name A-Z
Report	AAR list Last Modified 5/20/2016 10:31:40 AM Owner 42758	
Report	borrowing em Last M	
Report	BORROWING REQUEST 5/6/2016 10	
Report	Inventory List Last Modified 2/19/2016 10:32:03 AM Owner	
Report	Items overdue more than 30 day_Internal Last Modified 2/	
Report	Items overdue more than 30 day_Patrons Last Modified 2/	

The report will open with your data. You will want to save the report so you can customize it.



ExLibris Analytics

Search All

Advanced Help Sign Out

Home Catalog Favorites Dashboards New Open Signed In As dorism

Criteria Results Prompts Advanced

Subject Areas

- Fulfillment
 - Loan
 - Loan Details
 - Loan Policy
 - Loan Circulation Desk
 - Return Circulation Desk
 - Loan Date
 - Due Date
 - Return Date
 - Renewal Date
 - Last Renewal Date
 - LC Classifications
 - Dewey Classifications
 - Item Location
 - Bibliographic Details

Compound Layout

Title

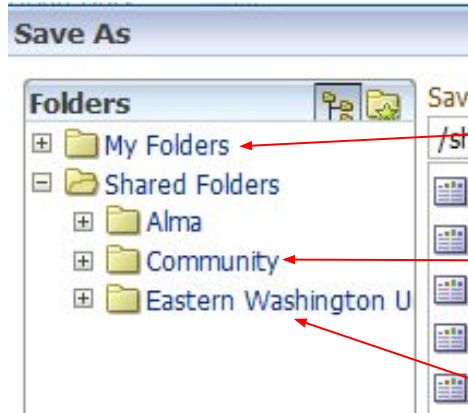
30 Days Overdue

Table

Due Date	Barcode	LC Classification Top Line	Title	Primary Identifier	First Name	Last Name
6/3/2016	40328775	Unknown	Laptop Computer	00833017	Rami	Alghamdi
	40330565	Unknown	Power cord, Laptop Computers		Rami	Alghamdi
5/10/2016	40371510	PC4117	Dos semanas con los	00831052	Shelby	Fettig

To save, click on the Save As icon

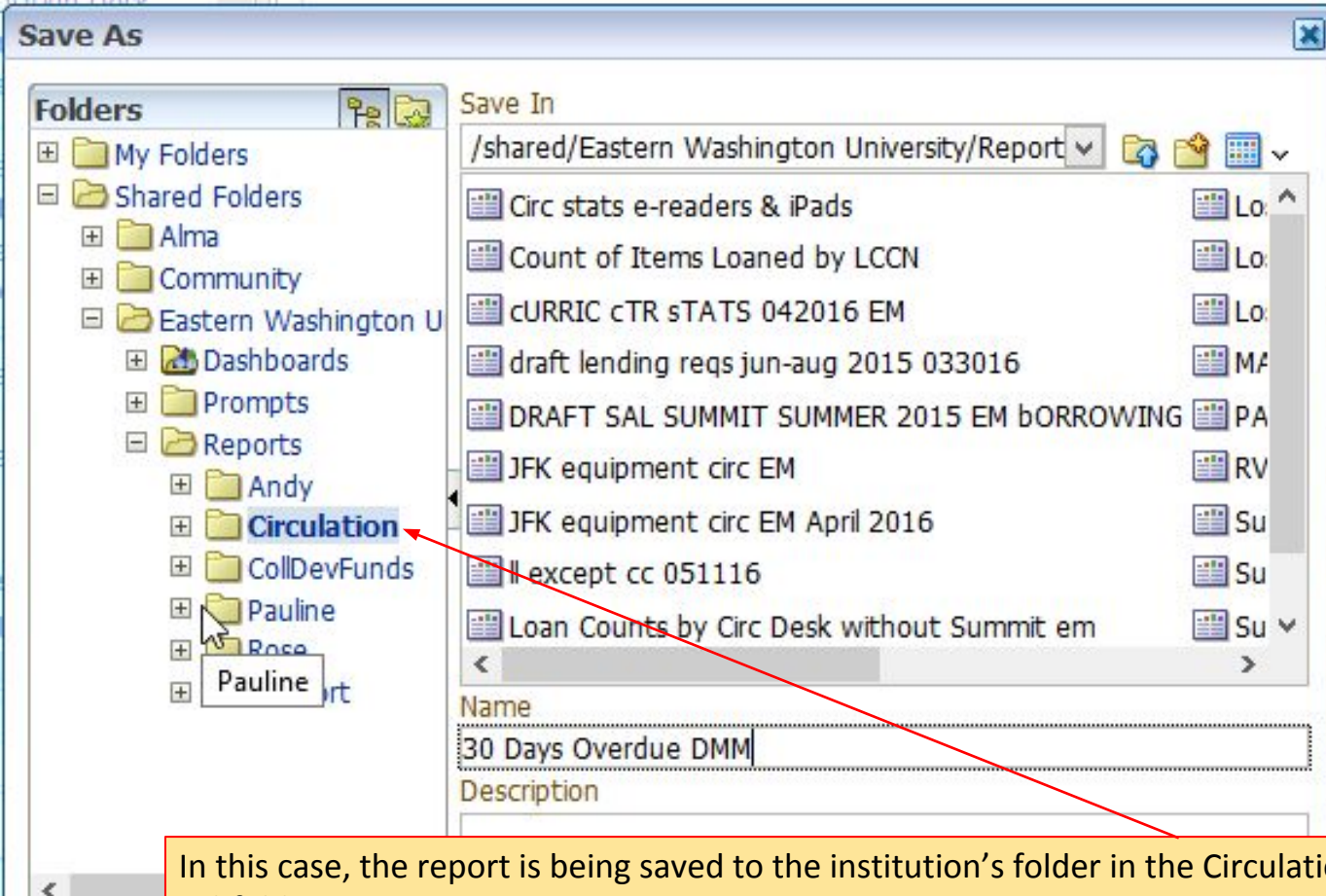
Select where you want to save the report



Save to My Folders if you don't want anyone else to see the report

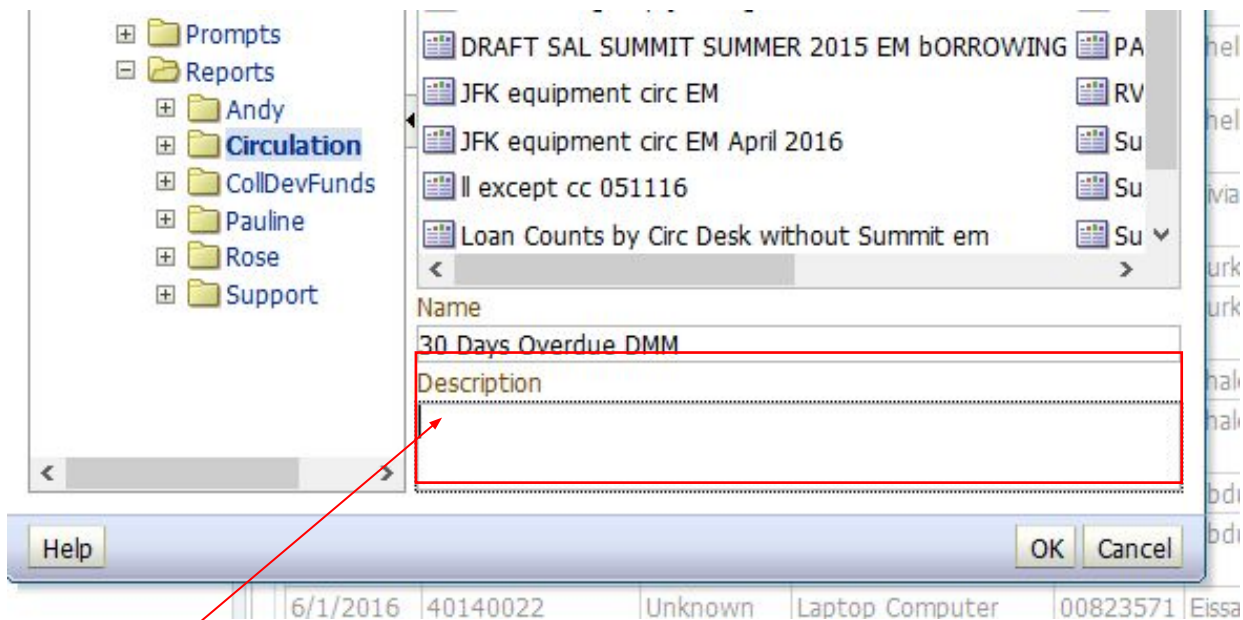
Save to Community if you want to share the report with other Alma libraries

Save to the folder with your institution's name if you want to share the report with others in your institution

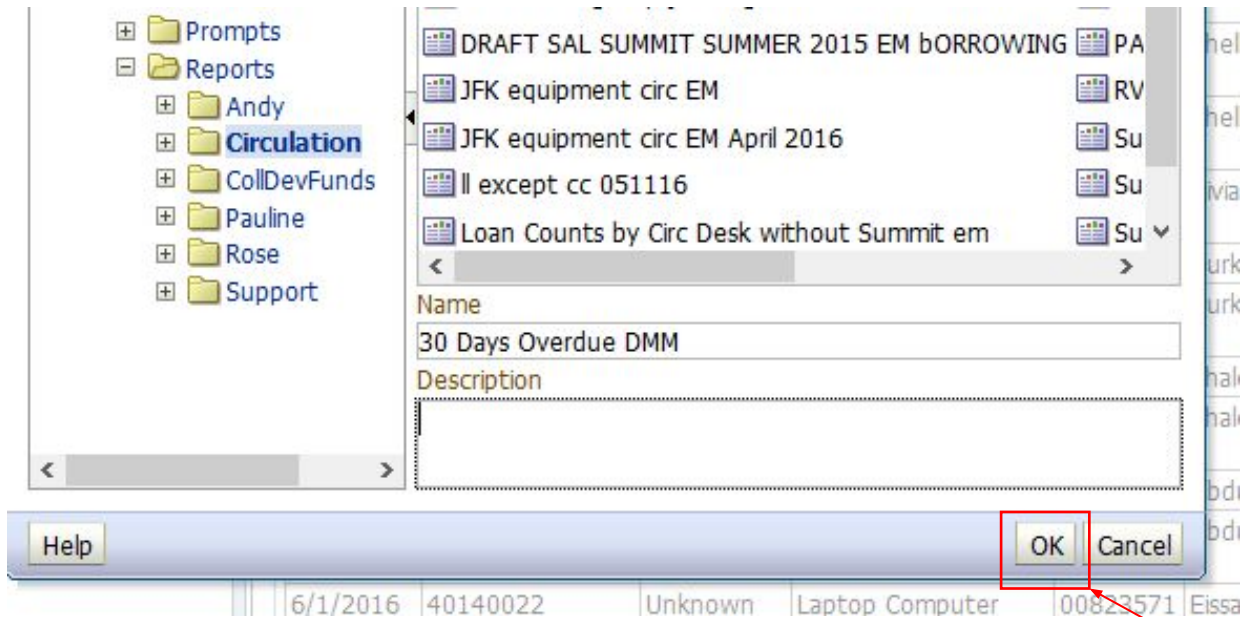


In this case, the report is being saved to the institution's folder in the Circulation subfolder

Note: Your institution will probably want to adopt a naming convention so you know who has done what report



The Description field can be used for an explanation about why you are saving the report. This can be very helpful in the future if you forget why you saved it.



After you have selected the location to save the report and given it a name and description, click OK to finish.

Comments or Questions?

Consider emailing the discussion list for your area and asking for help.