

## Moving Analytics Reports from “My Folders” to your Institution Folder

This information is applicable to those staff who are using Alma Analytics (reporting). It includes special, time-dependent instructions that must be completed before November 1 for anyone who has used the “My Folders” in Alma Analytics and wants to save the reports saved in that location.

Ex Libris is upgrading the platform that Analytics runs on to [Oracle Analytics Service \(OAS\) and Data Visualization \(DV\)](#). The Ex Libris NA06 server where I-Share libraries are hosted will be migrated starting November 1 with work completed by November 8.

The period of November 1-8 is a “freeze period”. **Any reports created and any changes made to existing reports in any folder, not just the “My Folders,” during the “freeze period” will not be migrated.** The freeze period for I-Share libraries begins November 1 and I-Share will be live on the new Oracle Analytics Server on November 8.

**All current Analytics reports will be migrated, except those in “My Folders”.** These are reports that are only accessible to the specific logged in user. If you want to save those Analytics reports that are in your “My Folders” locations, you must follow the steps below to move them before November 1, 2020.

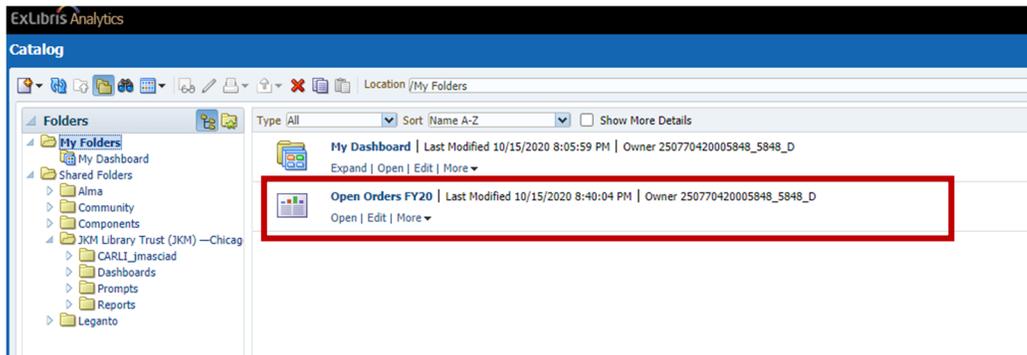
1. Login to Alma and select Analytics > Design Analytics or Design Analytics (Primo)
2. Click Catalog to open Folder structure



3. Open the My Folders directory

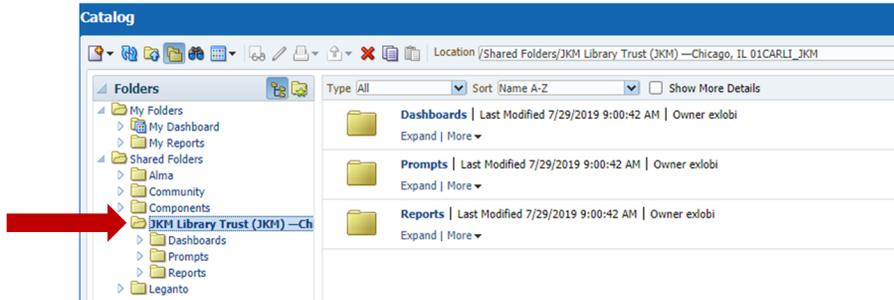
If you have any Reports that need to be Copied to the shared area they will be in the /My Folders directory.

In the example image below, with “My Folders” highlighted, there is one report that is saved in the /My Folders location:

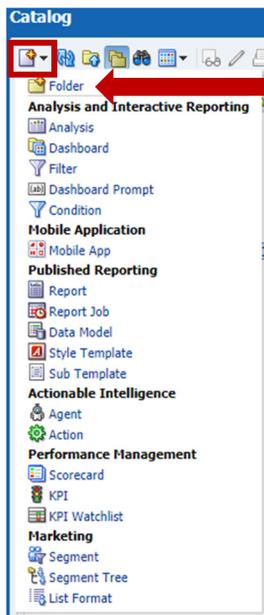


4. Next create a new Folder in /Shared Folders/[My Institution]/ called your name or some identifiable name.

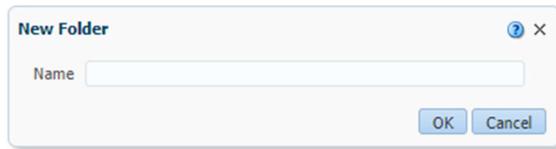
The example below is JKM's Analytics so the folder will be in /Shared Folders/ JKM Library Trust (JKM) —Chicago, IL 01CARLI\_JKM. Highlight the Institution Folder:



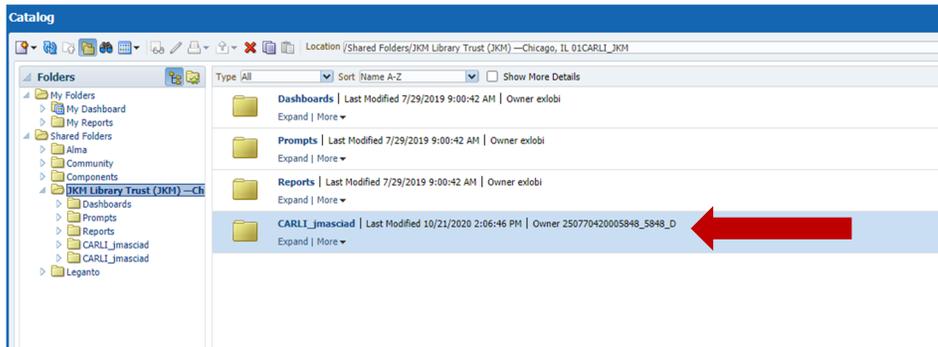
5. With the Institution directory highlighted, Click the New Icon > Folder



6. Enter your username, or an easily identifiable name for the new folder. Click OK.

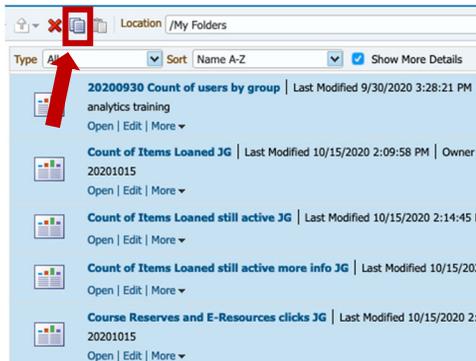


7. My new Folder and Location is: /Shared Folders/JKM Library Trust (JKM) —Chicago, IL 01CARLI-JKM/CARLI\_jmasciad

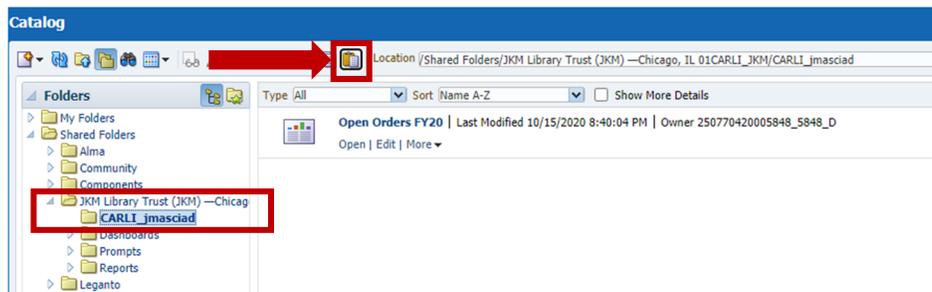


8. Now copy the Local Report from /My Folders to the new /Shared Folders/[Your Institution]/[Your Folder].
  - a. Return to the /My Folders and highlight a Report. Select Copy from the top menu.

If you have multiple reports to copy, you can use Shift to highlight them all and once highlighted, choose Copy from the menu.



- b. Highlight the /Shared Folders/[Your Institution]/[Your Folder]. Click Paste from the top menu.



If you have created any reports in your Analytics > Design Analytics (Primo) /My Folders/ you will want to follow these instructions to copy those reports as well.