Analytics Skills Checklist

Minimum Requirements

1. Know where to find information about Analytics on the WYLD technical support site.
2. Log in procedures for Analytics (username/password).
3. Know what your library can and cannot do in Analytics. For example, users can run, export, save, and schedule reports, but users are unable to create reports from scratch.
4. Know how to access BCA training materials on the Support Portal including the BLUEcloud Analytics User Manual for WYLD libraries, archived webinars, short introductory videos, and written documentation. Some materials require a Support Port (FreshDesk) login.
5. Run a report in the Shared Reports folder.
6. Save (as a template) a personal copy of a report in the Shared Reports folder to the My Reports folder.
7. Know how to navigate the Report Home, Tools, Data, Grid, Graph and Format tabs including drop-down menus and toolbars.
8. Understand that some fields (attributes) in Analytics have different labels than Workflows. For example, Home Location in Workflows is the same as Item Collection in Analytics.
9. Understand the difference and how to use the four types of prompts: elemental, qualification, value, and object.
10. Understand that date fields that are left blank in a report or dossier are given the date 1/1/1900.
11. Understand Analytics terminology (attributes, elements, metrics, etc.).
12. Know how to sort columns by ascending or descending values.
13. Add totals/subtotals to a report.
14. Understand how to use pivot buttons and how to click and drag to format a report (e.g., move columns to rows/rows to columns, move columns/rows in grid, remove columns/rows from grid, change a row/column to page-by field).
15. Add the results of a report to the History List.
16. Export a report to Excel, PDF, and HTML format.
17. Understand how the merging of row and columns headers in a report can affect how data is displayed and exported.
18. Know how to contact the WYLD office if you need additional help.

Intermediate Requirements

1. Schedule a report via email.
2. Schedule delivery of a report to the History List.
3. Familiar with the different output options when scheduling a report via email (e.g., Excel with formatting, HTML, plain text).
4. Familiar with different ways your data can be sent when subscribing to a report via email (e.g., data in email versus data and link to history list in email).
5. Create a personal view of a report.

6. Understand the difference between saving a report as a template and creating a personal view of the report.
7. Know how to use the "Send Now" option.
8. Manage (edit) report subscriptions.
9. Understand the differences between dossiers and reports.
10. Understand the difference between exporting a report as Excel with plain text versus Excel with Formatting. Hint: You must unmerge row/column headers before exporting a report into Excel with formatting.
11. Know how to hide/unhide report objects, notes, report details, etc.
12. Add a view filter to report.
13. Rename report objects (i.e., column/row headers).
14. Distinguish between tasks better done with Analytics and those which require WorkFlows reports.
15. Know when to contact the WYLD office for a customized report.
16. Add/format graphs in a report.

Expert Requirements

1. Convert a report to a dossier.
2. Create visualization (grid, chart, graph) in a dossier.
3. Apply advanced formatting to reports.
4. Create metrics in reports.
5. Drill in reports. (Drilling is when you can select an attribute or element (on a grid or graph and see data beyond what is currently on a grid or graph). See the [Drilling in Analytics](#) technote for more information (login required)
6. Know how to change your library's account preferences and understand how these changes affect your library's Analytics account.
7. Know how to manipulate and analyze data in database and/or spreadsheet programs, such as Excel.
8. Create derived elements in a report. See the [Creating Derived Elements](#) technote for more information.
9. Format graph and chart visualizations in a dossier.
10. Group elements in a dossier.
11. Create metrics in a dossier.
12. Create and apply filters in a dossier.
13. Use one visualization (grid, chart, graph) as a filter for other visualizations in a dossier.

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