

Alma Analytics Best Practices: Folder Storage

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This document highlights best practices for folder storage and naming conventions.

In our shared environment, users need to take care to only modify or delete reports in their personal folder. If a user wants to modify a report in the Community folder or in an individual's folder for their own purposes, that report should first be copied into and manipulated from that user's personal folder.

My Folders

Every Alma user with access to Alma Analytics is given a space in Analytics called "My Folders". Users are free to store, revise, edit and run any personal analysis or dashboards and save these analyses in this space. The **My Folders** space is not shared with any other user, so documentation and naming conventions are at the user's discretion.

Shared Folders / Alma

All analyses in the Alma folder are read only. Any user wishing to make changes should copy the work to their own personal folder.

Shared Folders / Community

The Shared Folders/Community space is view-only; most users should not add or make changes to any analyses in these folders, and those who are authorized by the Alma Analytics Auxiliary Group should only add to the subfolder named **UMinnesota**. Subfolders may be built off of **UMinnesota** as needed, by authorized staff. Users are always welcome to copy analyses in these folders to their own personal folder for their own development.

Shared Folders / University of Minnesota

The main **University of Minnesota** folder should contain only subfolders. These subfolders will be of two types: Analytic elements, and campus. For organizational purposes, Law Library will be considered its own campus here.

Shared Folders / University of Minnesota / {element} (e.g. Reports, Dashboards, Prompts)

These are subfolders reserved for data to be published through Alma, via Alma Widgets and Dashboards. These items are shared across all campuses, so should be developed with a larger scope in mind. When possible, these reports and dashboards should be developed to be

usable by any user on any campus. Any item within those specific folders must have a meaningful name, with a description elaborating on its purpose and criteria. If there are limitations on a campus level, these should be noted in both the title and description.

Shared Folders / University of Minnesota / {campus}

Within each campus subfolder, individuals, divisions and departments are encouraged to establish their own subfolders to store and share their work. Names for SubFolders should clearly identify the user ("Michael Johnson", "George Swan", for example) or the unit ("Collection Management", "ARM").

Within each of these subfolders, names should be meaningful to users within the given unit. Descriptions should be used to ensure clear and concise understanding of content within the folders. Users should be aware that any work stored in these subfolders is viewable and can be edited by all staff at the University of Minnesota (all campuses).

Note: Use of ampersands ("&") in names conflicts with Alma and should be avoided. In general, avoid special characters in naming.