UAccess ANALYTICS
Next Steps: Using My Analytics Lists

Have you ever wanted to be able to use some of your own departmental data in conjunction with data that comes from UAccess Analytics? Have you wanted to do that without having to continually download data from Analytics, then trying to merge it with your own data in Excel?

With **My Analytics Lists,** you can upload your data one time (and again if it changes) and make it available via Analytics for **Student**-, **Employee**-, **Research**-, and **Financials**-based analyses.

1. **Create your My Analytics List in a Spreadsheet**
   The first thing you must do is gather the data you wish to use and get it into a spreadsheet. The data you will use in the spreadsheet would be data that is not otherwise available in Analytics. Don't waste space and columns by replicating data you can already find in Analytics. Besides that note, there are some specific criteria that must be met, however.
   a. The spreadsheet may have just **ten or fewer columns of data**, but may have an **unlimited number of rows**. Since you're using Excel to create your list, your custom data can be entered in columns "C" through "L." You may create, manage, and use more than one list.
   b. Do not use punctuation of any sort in the data columns.
   c. Do not use column headers, or delete those column headers before uploading your data.
   d. The first column in the spreadsheet – which doesn't count as one of the ten data columns – is the **primary key** column. Each row of this column must contain a unique value which can be validated as an actual **Financial Account Number**, **Department Code**, **Employee ID/Student ID**, et cetera. This is the column that Analytics will use to match up your data with the data coming through Analytics.
   e. The second column – also not counted as one of the ten allowed data columns - is a **Hide** column. The only supported values are a "Y" or an "N." A blank is equivalent to an "N." The column can be used in filtering later, if desired.
   f. The data in the ten data columns is limited to **20 characters** in length in each column.
   g. Each cell in any of the ten available columns that you use must have something entered. Enter a zero, X, or dash in those cells that would otherwise be empty. If any column is not being used, leave the entire column empty.
   h. The spreadsheet must be saved in **CSV** (comma-separated values) format.

	A	B	C	D	E	F	G	H	I	J	K	L
1	00123456	Y	1989	Ford	Festiva	Blue						
2	00234567	N	2003	Jeep	Liberty	Red						
3	00345678	N	2013	Hyundai	Tucson	Green						
4	00456789	Y	1985	Yugo	-	Rust						
5	00567890	Y	2009	Nissan	Pathfinder	Orange						
6	00678901	Y	2010	VW	Beetle	Yellow						
7	00789012	Y	2008	Honda	Accord	Silver						
8	00890123	N	2011	Dodge	Charger	Black						
9	00901234	Y	2010	Dodge	Ram	Blue						

2. **Create your My Analytics List in UAccess Analytics**

   Now create the structure of your list in Analytics.

   a. From the **Home** page in Analytics, click the **Manage** link next to the phrase **My Analytics Lists** in the **Browse/Manage** section on the left side of the screen.

      1) Click the **Create New List** link on the My Analytics Lists page.

         i. **Select** a **List Type** that matches the type of data you entered in the first column in your spreadsheet.

         ii. Enter a **List Name**.

         iii. **Enter** labels for your columns of data.

         iv. Click **Save**.

3. **Upload your Spreadsheet to UAccess Analytics**

   Now identify the list and upload your custom data.

   a. Click the **MyAnalytics Lists** link at the top of the page.

   b. Select the **List Type** and **List Name** using the selection boxes. These are the same values you entered in steps **2.a.1.i** and **ii** above.

   c. Click the **Upload from file (.csv)** button.

      1) **Browse** to locate the file you saved earlier.

      2) Click **Upload** and then click **OK**.

   3) Click **Save** to store your custom data on the Analytics server.

4. **Use your My Analytics List**

   Your custom departmental data is now available for use in Analytics!

   a. In Analytics, click the **New** button on the Global Header and select **Analysis**.

   b. **Select** a **Subject Area** for which My Analytics Lists have been activated and which has a column with values that match the values in the primary key column in your list.

   c. **Create** your analysis.

      i. **Include** the column of data from Analytics that matches the data in the primary key data in the spreadsheet; i.e., Account Number, Employee ID, etc.

      ii. **Add** the remaining or desired **Custom # Code** columns from the My Analytics Lists table to your analysis, as appropriate. No Headings columns are needed.

      iii. **Rename** the Custom # Code columns headings to match the data in the column.

Account	MyAnalytics Lists			
Account Number ↓↑	Amount ↓↑	First Name ↓↑	Custom 3 Code ↓↑	Custom 4 Code ↓↑

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   iv. **Add** any desired filters. At a minimum, be sure to include filters for:

     1. **List Owner NetID** *is equal to / is in* **(your NetID)**

     2. **List Name** *is equal to / is in* **(Name of List)**

> List Owner NetID is equal to / is in stevenjs 🔲 ❎
> **AND** List Name is equal to / is in Account Data 🔲 ❎
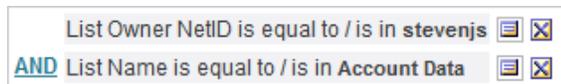
     3. If you wish to filter to only the accounts, employees or students, departments, et cetera, that are actually in your uploaded list, create a filter that reads **Custom 1 Code is not null**.
This ensures you're using the list you just created and uploaded and are not inadvertently accessing some other list.

  d. Click the **Results** tab

   i. The analysis will display only rows of data from within Analytics and from your My Analytics Lists where the data in your primary key column matches data from the appropriate Analytics column. The lists are inner-joined to the data.

5. Deleting Analytics Lists

You can't delete an Analytics List. But we can.

  a. Open a web browser on your computer and navigate to the University Analytics and Institutional Research (UAIR) website at http://uair.arizona.edu.

  b. Click the **Contact Us** link in the top menu or in the Quick Links box on the right.

  c. Fill out the form at the bottom of the screen, selecting **UAccess Analytics – Other** as the topic with which you need help. In the **Message** field, provide the *exact name* of the Analytics List you'd like deleted, and the *NetID* of the owner. We'll contact you for confirmation, then delete the List.

6. Important Notes

  a. Any and all data you upload to **My Analytics Lists** is *visible to anyone with access to those Subject Areas*. Do NOT upload confidential, restricted, or sensitive data.

  b. All data – including numbers – comes through Analytics as text. You may have to CAST the data as INTEGERS or DOUBLE PRECISION to make the numbers show up as numbers. Contact **Steve Singkofer** for assistance with the simple process.

My Analytics Lists Enabled Subject Areas   34 Subject Areas

System	Subject Area Name	Acct No	Dept Code	Empl ID	Position No	Proposals	Awards	Other
Budget	BUD - HCM - KFS Budget Book	X						
	BUD - HCM - KFS Department Line Budget Balance	X			X			
Employee	HCM - Census Data			X				
	HCM - Employee Profile		X	X	X			
	HCM - Employee Title & Tenure		X	X				
Financials	KFS - Account Cumulative Activity	X						
	KFS - Account Monthly and Cumulative Activity	X	X					
	KFS - Account Monthly and Cumulative Activity Snapshot	X						
	KFS - Account Monthly and Cumulative Activity with PI Details	X						
	KFS - Capital Asset Management	X						
	KFS - Capital Asset Management Snapshot	X						
	KFS - Effort Certification	X						
	KFS - Labor Ledger Entries	X		X				
	KFS - Labor Ledger Entries Snapshot	X						
	KFS - Ledger Entries	X						
	KFS - Ledger Entries Snapshot	X						
	KFS - PCard	X						
	KFS - Purchasing and Accounts Payabl	X						
	KFS - Shipping and PDP	X						
HPC	HPC - High Performance Computing Awards			X				
	HPC - High Performance Computing Usage			X				
Research	IA - Research Awards and Summary Expenditures	X	X	X			X	
	KC - Proposal Profile	X	X	X		X		
	KC - Research Award Profile - Based on Award Document	X	X	X			X	
	KC - Research Award Profile - Comprehensive	X	X	X		X	X	
	KC - Research Award Profile - Incl Award Docs & Investigator	X	X	X			X	
	KC - Research Proposal Profile by Investigator	X	X	X		X		
	KC - Snapshot Awards by Docs and Investigators	X	X	X				
Student	CSW - Student Profile			X				
	CSW - Student Profile - All Academic Plans - Census			X				
	CSW - Student Profile - Census			X				
	CSW - Student Profile All Academic Plans			X				
	CSW - Student Records Class Enrollment			X				
	CSW - Student Records Class Meeting Pattern			X				

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