

Analytics

In this session you will learn Analytics work with Rialto.

In order to access Analytics you will need to be assigned the corresponding roles by your Administrator.

I am currently signed in as a Rialto Administrator with the correct Analytics role. Analytics can be accessed through the Analytics icon in the menu bar on the left. Here you can see all of the standard Alma reports as well as additional out of the box reports specifically designed for Rialto.

I'm going to select a report, Purchase Order Lines by Fund Code. You can see that it works just like a standard report, and once the page loads a prompt is displayed to select a ledger name and code. I'm going to choose the Fund Ledger Name "Anthropology" and I'll leave the Ledger Code blank and click "OK".

Now I have a list of all the Purchase Order Lines for my selected ledger.

As you have seen Rialto orders are fully integrated with Alma analytics. To find any information you simply need to filter by Rialto as the vendor. Let's take a look at that now.

I'm going to go back to the Alma dashboard and open the Analytics menu, and choose "Design Analytics". I don't currently have any content on my Analytics dashboard.

Now I'll open the "Catalog" and find the report we were just looking at and narrow the results to only Rialto orders by default. I'll go to Shared Folders > Community > Reports > Shared Reports > Rialto. When I click on this folder I can find the report I was just looking at "PO Lines by fund code".

I'll click "Edit", and it will open a page that shows me an unfiltered preview of results. To add default filters to this I'm going to click on "Criteria"; then find "Vendor Code" or "Vendor Name", and add a new filter. In the pop up I'm going to add an operator and value that says to only show items purchased through Rialto. Once I've added it, I'll click "OK".

Now when I click back to "Results" I see only orders that were purchased through Rialto. From here I will click "Save As" and choose a location. Please note that you must use Save As, or it will change the report for all Rialto users, not just your institution. This process can be applied to any existing reports that your institution has or the out of the box reports. These reports can then be the basis for your dashboard or widgets.

For full training on Alma Analytics please visit the Knowledge Center at knowledge.exlibrisgroup.com/Alma.