



# Analytics in Alma

A new user interface of Analytics within Alma



# Agenda

## Alma Analytics Enhanced UI

- ▶ Key Features
- ▶ Schedule and Rollout Plan



# Alma Analytics Enhanced UI

Analytics tools are essential for librarians and should be as integrated as possible with their library management systems.

The values we  
strived to achieve

- ▶ Easy Sharing
- ▶ Easy Access
- ▶ Preview of Report Information
- ▶ Staying in Alma

# Immediate Preview of Report Information

The screenshot displays the ExLibris Analytics reports interface. The top navigation bar includes the ExLibris logo, dropdown menus for 'Market' and 'Title', a search bar, and utility icons for notifications, location, calendar, user profile, help, and refresh. The main content area is titled 'Analytics reports (1 - 20 of 253)' and features a search bar, sorting options (currently 'Modification Date'), and filters for 'Type', 'Subject Area', and 'Permission'. A list of reports is shown, with the first report highlighted by a red box. The highlighted report details are as follows:

Report Name	Subject Area	Type	Creator	Analytics folder	Creation date	Modification date	Actions
Report name	Subject Area Analytics Objects	OAS Report	John Smith	Location/Location/Location	02/02/2020	02/02/2020	Report in favorites, View full report, ...

The interface also includes a left-hand sidebar with navigation options: Alma QA, Analytics, Market, Acquisitions, Resources, Discovery, Fulfillment, and Admin.

# Easily Access

The screenshot shows the ExLibris dashboard with a sidebar on the left containing navigation icons for Alma QA, Analytics, Market, Acquisitions, Resources, Discovery, Fulfillment, and Admin. The main content area is titled 'Dashboards' and 'Analytics Reports'. Under 'Analytics Reports', there is a search bar and a list of reports. A red box highlights the following list:

- 1 API Usage (Ex Libris)
- 2 E-Inventory (Ex Libris)
- 3 Fulfillment - Loans Returns and Overdue
- 4 Acquisitions - Fund Reports (Ex Libris)
- 5 POLs Received and not Yet Invoiced

Below the list, there are sections for 'My Reports' (Analytics Object List, Shared with Me) and 'Create Reports' (Create in OAS, Create in DV, Create in OAS (Primo), Create in DV (Primo)).

This screenshot shows the 'Report preview' interface for an analytics report. A red box highlights the 'Report preview' header and the 'View full report' and 'Add as widget' buttons. Below the report list, a line chart titled 'Loans YoY (Year over Year)' is displayed. The chart shows 'Loans (2 Cal. Years Ago), Loans (1 Cal. Year Ago), Loans (Current Cal. Year)' from March 2022 to March 2023. The y-axis represents 'Loans (2 Cal. Years Ago), Loans' ranging from 0K to 21K. The x-axis represents 'Month Num and Name'.

Month	Loans (2 Cal. Years Ago)	Loans (1 Cal. Year Ago)	Loans (Current Cal. Year)
Mar 22	10K	10K	10K
Apr 22	12K	12K	12K
May 22	18K	18K	18K
Jun 22	17K	17K	17K
Jul 22	17K	17K	17K
Aug 22	10K	10K	10K
Sep 22	12K	12K	12K
Oct 22	15K	15K	15K
Nov 22	14K	14K	14K
Dec 22	10K	10K	10K
Jan 23	10K	10K	10K
Feb 23	10K	10K	10K
Mar 23	10K	10K	10K

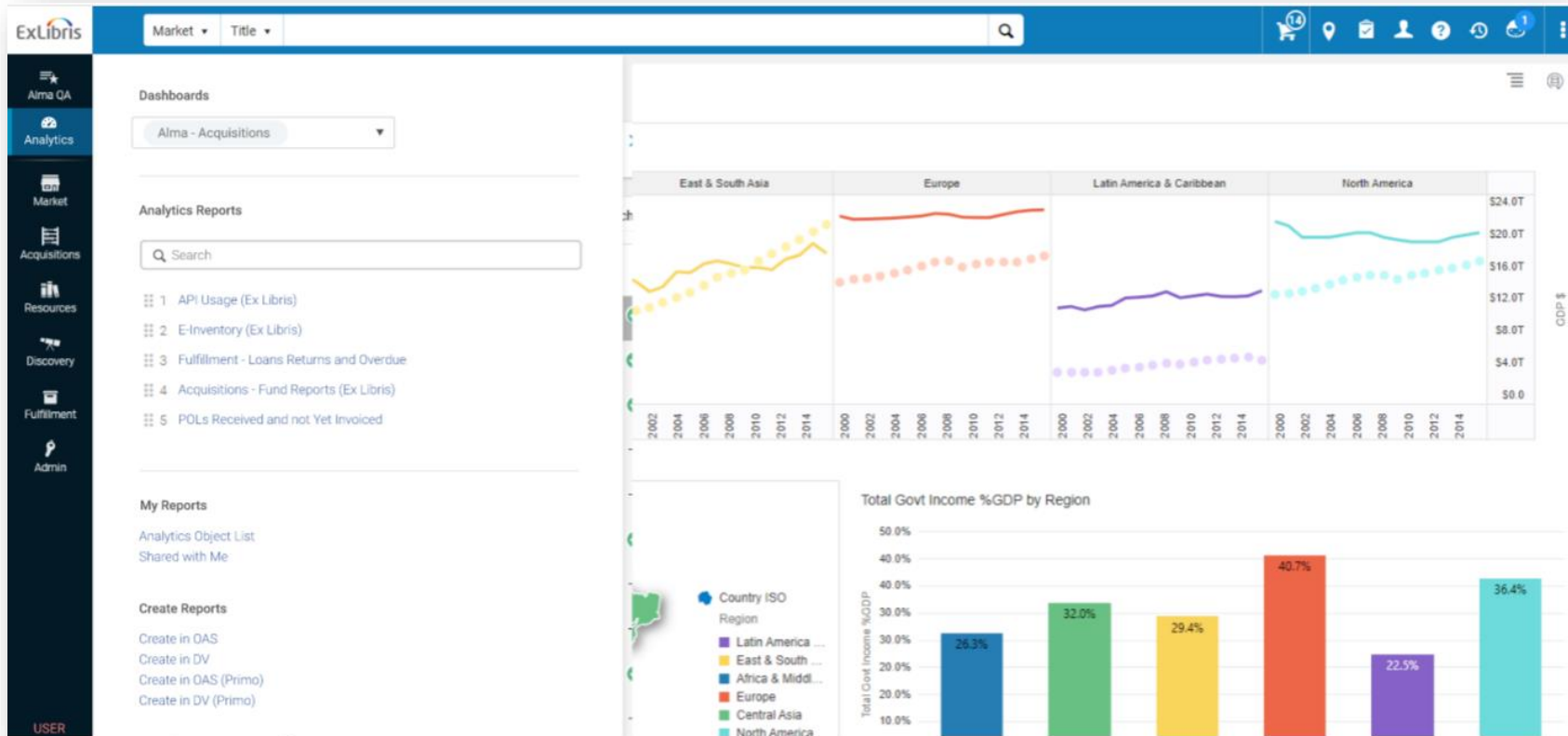
# Easily Share, Easily Schedule

The screenshot displays the ExLibris Analytics reports interface. On the left, a sidebar lists navigation options: Alma QA, Analytics, Market, Acquisitions, Resources, Discovery, Fulfillment, and Admin. The main area shows a list of analytics reports (1-20 of 253) with columns for Report Name, Subject Area, and Type. A report titled "Report name" (Subject Area: Analytics Objects, Type: OAS Report) is selected. A red box highlights the "Report URL" field, which contains "www.analyticsreportsurl.com".

Below the report details, a "Share report" section is visible, including options for "Internal Users" (John Smith), "External Users" (Add external email), and "Roles and Profiles" (Vendor account manager, Add Roles from Profiles).

A "Scheduling" dialog box is open in the foreground, showing the "Schedule report" option checked. The "Edit Recurrence" section is active, displaying a "Recurrence pattern" of "Weekly". The "Recur every" is set to "1" week(s) on: "Monday". The "At" time is set to "09:00 AM". The dialog includes "Cancel" and "Save" buttons.

# Stay in Alma



# Schedule and Rollout Plan

## Phase 1

2022 H2: Early Access

2023 H1: Production

**New UI will be available with most of the capabilities presented:**

- ✓ Report info and side by side preview
- ✓ report preview within Alma
- ✓ easy scheduling, and more

## Phase 2

2023 H2: Production

**Two powerful capabilities to be added:**

- ✓ User-based sharing (overriding roles)
- ✓ Deep link sharing
- ✓ Reports to external emails



# Thank you!

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