Alma Administration – Resources  
Analytics Objects

Hello, after you've created reports in Alma Analytics, you would want the library staff to be able to view them.

We'll do this by creating Analytics Objects. In Alma go to Analytics> Analytics Objects >Analytics Objects List. Click Add New Analytics Object and choose Add New Alma Analytics Object. Note! You will need the Analytics Administrator role to be able to access Analytics Objects list page and create objects.

There are several types of analytics objects used in Alma, these are ways that users can access them. Dashboard, Data Visualization Project, and Report types can be accessed from the Analytics Menu in Alma.

Scheduled Dashboard and Scheduled Report offers a subscription option, which will be an email with a file attached. A widget – may be shown on the Alma homepage. You can create any type of object, and more than one, for your analytics report.

Dashboard, Report, Data Visualization Project, and Widget have similar parameters. I'll make this one a report. Enter the Title for the Analytics Object - this should be descriptive enough for the user’s benefit.

Select the Analytics folder. This is the location in Design Analytics where the original report can be found. Under Name, select the desired analytics report. Here is our report. You can also add an optional Description.

Either by adding from Profiles or Adding Role, select which user roles can view this Analytics Object. In our example, since this is an acquisition report, we want the Acquisitions Administrator to be able to view it. And I'll add the User Administrator too.

Click Add Role to save your selection.

If you’re creating a scheduled report or dashboard, which sends the report by email via a job that runs periodically, you need to fill in these additional parameters:

Format: the report file type attached in the email: PDF, Excel, Text or CSV. The format parameter does not apply to Dashboards. Status: should be active if you want the report to be sent out.

Schedule: allows you to send the report daily, weekly, or monthly.

If you choose to send the report to an FTP server, additional FTP configurations need to be entered. Learn more about scheduling FTP reports in scheduling and Subscribing to Alma Analytics Reports page in the Online Help. When you're done filling in the information, click Save.

The new Object is added to the Analytics Object List as a report. From the row action list, you can view the object, Edit it, Duplicate it, Delete, Preview the report in a pop-up window or view the hidden columns. Our users, assuming they have the acquisition administrator role, can run it from Alma Analytics > Reports. Note, that to see your report under the Reports menu right away, you'll need to refresh.

For scheduled objects, you can see if the status is active, meaning the job will run on schedule, and you can also subscribe yourself to the mailing list from here.

Alma users with the proper role can subscribe to scheduled reports from Alma Analytics > Subscribe to Analytics

And finally, users can add widgets from Alma homepage, via the plus icon checking the desired object.

Let's refresh. Here it is!

Now you know how to expose analytics to other staff operators using Analytics objects, Thanks for watching!