Alma Administration Certification – Resources  
Analytics Reports and Objects

Hello, with Alma Analytics you can answer important business questions that will help you achieve data-based decisions by running reports, using data visualization, dashboards, widgets and share your insights with the library staff.

Questions you may ask yourself are:

What items have been overdue for at least 30 days? I’d like to create a list of those items.

And How much money do I pay to vendors?

In this session we will answer these 2 questions by running an existing report and creating a new report.

Analytics is accessed via Analytics> Design Analytics. This is where reports are created and managed.

Every day a full database refresh takes place. Your data goes through an ETL, Extract Transform and Load, process. The Data Available as of – is the time that the data completed the ETL process, and the Data updated as of is the time that the data was extracted from Alma.

Note the time of day that this happens. Any activities that took place in Alma after the extract has started will not be reflected in the current data load. Therefore, we recommend that you schedule or run reports early in the morning as opposed to late at night.

Let's get to know Alma Analytics a little bit better before we create the first report. choose Analytics > Design Analytics. Note! You will need a Design Analytics role to enter Design Analytics.

Alma Analytics is built on Oracle Analytics Server. That is the interface in which we are working. This is your dashboard. The first time you'll enter it will be empty. You can edit this page and add any reports that interest you. Through the Global Header you can access different components of OAS. Read more about each of these options in the Navigating Analytics page in the Online Help.

Let's go to Catalog to access existing reports. My Folders is a personal folder accessible only to the logged in user. Within Shared Folders, the Alma folder contains out of the box reports created and distributed by Ex Libris.

The folder with your institution’s name contains reports that are accessible by users from your institution. The Community folder has reports that have been shared by other institutions.

Starting with our first question, “What items have been overdue for at least 30 days?” We will use an existing report to answer this question.

I’ll expand the Alma folder, then the Fulfillment folder and finally the Reports folder. Here's a report named Overdue Items. By choosing Edit, the report will run on my institution’s data. We will be able to customize it if needed.

Here on the Results tab, you can see the answer to our question, yes we have overdue loans, and here's the list.

I don't want the entire list, only those that are over 30 days late. Under the Criteria tab, we can see how this report was written.

Looking at the Filters, the report is looking at active loans, that have a due date before today’s date, from the past year, and showing only the libraries and circulation desks that have items that meet this criteria. Under Selected Columns are the fields presented in the report- Library Name, Title, Barcode, Days overdue, etc.

Let's filter this report to answer our question.

Click on the gear next to Days Overdue and choose Filter. From the Operator drop down menu choose is greater than and enter and 30 in the Value field. This filter now displays in the Filters section.

Let's look at the Results. I’d like to save it. Since this is an out of the box report, it’s a read-only report and Alma is a read only folder, so the Save button is disabled.

I'll choose Save as, change the location to Shared folders > my institution's folder > Reports and change the report’s name to accurately describe the current report. And we're done – first report is ready and shared.

Now let's answer our second question by creating a new report. Go to New > Analysis. The data in Analytics is organized into subject areas. Financial transactions can be found under Funds Expenditure.

Expanding some of the folders shows measures and attributes we can use in our reports.

I've planned my report beforehand, and I know this is the information I need, I'll find the relevant data point, and double click or drag and drop it into the Selected Columns area.

Vendor name, Vendor code, Acquisition method, Transaction amount – note that transaction amount is a measure, and that analytics is doing the calculation for you which makes report writing easier, and month and year.

Now I want to filter the data- I only want to see purchases, so I'll click the gear icon next to Acquisition Method and choose Filter. In the Value drop-down menu, I will check the box next to Purchase and click OK.

I also want to limit my results to the current year, so in the Transaction Date Year, I will click on the Gear and select Filter again. In the Value menu I will select the fiscal year on which I am reporting

and click OK.

Now that I have year and Acquisition method as filtered attributes and I don't need them to display in my report, I can remove them from the columns. To do this I will click the gear next to Acquisition Method for example and choose Delete.

Let's look at the Results tab. Here's the list of vendors with the amounts.

It would be easier to view this information by month, Go to the New View icon, Pivot Table.

Scrolling down, you can see the information organized by month. You can choose any alternative visualization to show your data.

You can save your report in your personal folder, but if you have finished it and you want to share it with your colleagues, Save it under Shared Folders in your institution's folder > Reports. Fill in a Name and Description if you'd like. And click OK.

Your report is ready to be viewed.

Now you know how to use Alma Analytics to answer your business questions. Thanks for watching!