Alma Administration – Analytics
Configuring User Statistics

When generating Analytics reports on your users in Alma, you can pull up attributes such as the user's Birth Date, Full Name, Job Category, and User Group. In addition to these out-of-the-box attributes, Alma offers five generic user attributes called statistical categories, which you can use for custom data of your choice. For example, you may want reports that categorize users by academic discipline, country of origin, or dietary preference. In that case, you would assign Statistical Category 1 to be the Discipline, Statistical Category 2 to be the Country of Origin, and so forth.

In this session, we'll demonstrate how to configure user statistics, in the following steps:

* Create the category types; for example, Country of Origin.
* Define the statistical categories, or possible values of a type; for example, Germany and Canada.
* Map the statistical categories to their category types. For example, Germany and Canada are possible values for Country of Origin.
* Assign a category type to one of the five available Analytics User Statistics. For example, Statistical Category 2 is mapped to the Country of Origin.
* Next, we'll show how to attribute a statistical category to a user. For example, Maud's Country of Origin is Canada.
* Finally, we'll show how to create an Analytics report with user statistics, like this one.

Let's get started! Suppose we want statistics on our users' dietary preference, so we can plan the proportion of vegan snacks in the library's recreation room.

First, we need to create a category type called Dietary Preference. Go to Alma Configuration > User Management > User Details: Category Types. In the Code Table, we can see our existing category types, such as Discipline and Country of Origin. Note that we can create as many category types as we want, but only five of them will be available in Analytics. To create a new category type, click Add Row. Give the type a unique Code and Description. You can optionally make this the default type, which will be defaulted to when loading users via API. We won't do that for this category type, though. Click Add Row. Our new category type has been added. Click Save.

Next, let's create the statistical categories for Dietary Preference. These are the possible values, such as Vegetarian, or Vegan. Still in Configuration, go to User Management > User Details: Statistical Categories. In the Code Table, you can see all the existing statistical categories. For example, Social Sciences and Psychology are possible values for the Discipline category type. Via Add Row let's add statistical categories for Omnivore, Vegetarian, and Vegan. This is done in the exact same way as we added the types. Here are our new statistical categories. Click Save.

Next, we need to map our statistical categories to the Dietary Preference category type. Still in Configuration, go to User Management > User Details: Statistical Categories/Types. In the Mapping Table, you can see how Statistical Categories are mapped to their Category Type. For example, Australia is a possible Country of Origin. To add a mapping, click Add Row, select the desired Statistical Category, give it a Category Type, and click Add Row. Repeat the process for the other statistical categories. We've now mapped Omnivore, Vegetarian, and Vegan to the Dietary Preference category type. Click Save.

The final step of our configuration is to map our category type to one of the five Analytics User Statistics. Still in Configuration, go to Analytics > General Configuration: Analytics User Statistics. In the Code Table, you can see how each of the five Analytics User Statistics is mapped to a category type. Let's enable STATISTICS\_5 and map it to Dietary Preference. Click Save.

With this, we've finished configuring our statistical categories! Now let's see how to assign these statistics to users and pull them up in a report.

To assign a statistic to a user, go back to Alma. Search for a user, for example John Abraham, and click on their name to edit. Go to the Statistics tab. We can see John has the Chemistry Statistical Category for the Discipline Category Type. Let's assign Vegan for John's Dietary Preference. Click Add Statistic. Select the Category Type and the Statistical Category, and click Add and Close. We can see the Vegan statistic has been added. User Statistics can also be added via the Users integration or via Alma's APIs. Save the user.

Finally, to generate a User statistics report in Alma Analytics, go to Analytics > Design Analytics. Click Create > Analysis, and for the Subject Area, select Users. Under User Details, Select the attributes you'd like in the report, for example the users' Full Name. And, pertinent to us, let's select Statistical Category 5, which, as you recall, is the newly created Dietary Preference. Let's add a filter on this field to make sure it is not null, so as to only list users that actually have a Dietary Preference. OK. Open the Results tab to see the report. And here we can see the report of our users listed by Full Name, and in the Statistical Category 5 column, we can see their Dietary Preference.

So that's how you set up user statistics and use them to create a report. More information in the documentation.

Thanks for joining!