

Analytics in Alma

A new user interface of Analytics within Alma

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Agenda

Alma Analytics Enhanced UI



- ▶ Key Features
- ▶ Schedule and Rollout Plan

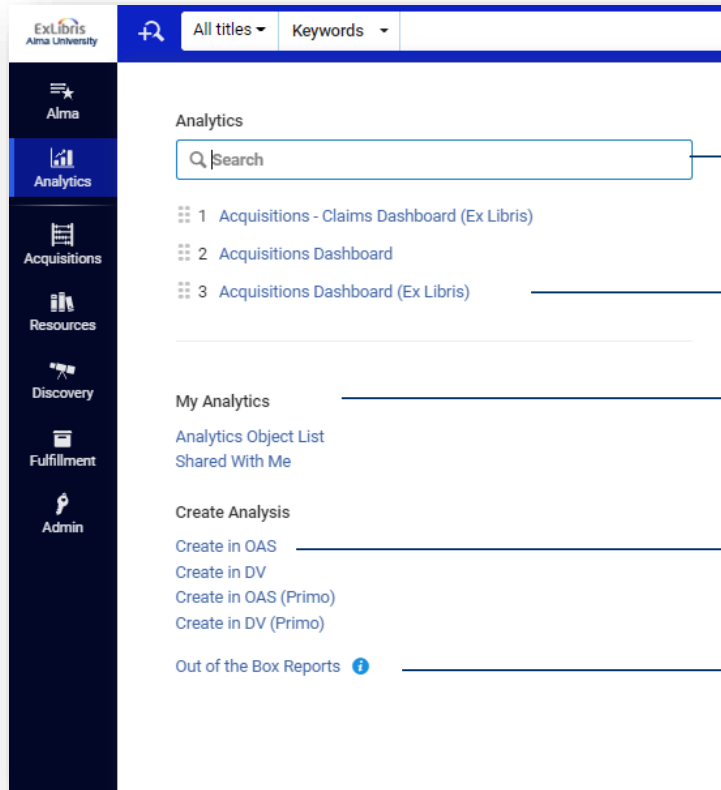
Alma Analytics Enhanced UI

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

New Menu: Easy Access (to what matters to you)



"Search" all "Analytics Objects" (role based)

"Favorites Analytics" quick links

"Analytics object list"-admins only
"Shared with me" – All users

"create reports" – Link to OAS/DV
(designers only)

"Out of The Box Reports" by Ex Libris.

Unifying Analytics Objects

A unified approach towards analytics objects

“Scheduled report/dashboard” and “Widget” will no longer be separate objects, but act as optional features once a report was added as an object

Automated Report Properties

Report name, report type (OAS, dashboard, DV) and even Subject Area will be auto pulled from OAS and populated in Alma

The screenshot shows the 'Edit Report' dialog box with the following fields and values:

Field	Value
Analytic Folder *	Alma/Acquisitions/Dashboar... ▼
Report Name *	Acquisitions Dashboard ▼
Display Name *	Acquisitions Dashboard 2
Description	Acquisitions Dashboard ...
Type	Dashboard
Subject Areas	Funds Expenditure
Object Creator	Staff, Ex Libris
Object Creation Date	11/08/2021
Object Modification Date	28/07/2022

Buttons: Reset, Save

New Object List: Immediate Preview of Report Information

Analytics Object List (1 - 20 of 28)

Name Search Sort by: Name ▾ Type: All ▾ Origin: All ▾ Subject Area: All ▾

on 11/08/2021
Object modified by
Staff, Ex Libris
on 03/08/2022
Subscribed
Scheduled Report

A - DV test 2 Analytic Folder Main View full report ...
Type Data Visualization
Project Campus/Yakova/
Subject Areas Course Object created by
Reserves, Titles Staff, Ex Libris
on 01/05/2022
Object modified by
Staff, Ex Libris
on 14/07/2022
Report In Favorites
Scheduled Report

Acquisitions Dashboard 2 Analytic View full report ...
Type Dashboard Folder Alma/Acquisitions/Dashbo
Subject Areas Funds Expenditure ards/
Expenditure Object created by
Staff, Ex Libris
on 11/08/2021

Acquisitions Dashboard
Type Dashboard
Subject Areas Funds Expenditure
Description Acquisitions Dash

Share
Add External Emails
Add Users
Add From Profiles

Purchasing Operator Purchasing Manager Acquisitions Administrator General System Administrator Designs Analytics
Analytics Administrator

Search...
All
Fulfillment
Borrowing Requests
Titles
API Usage
Analytics Objects
Fines and Fees
Physical Items
Course Reserves

Sections View full report ...
Analytic Folder /shared/Alma/Acquisitions/Dashboards/
Object created by Staff, Ex Libris on 11/08/2021
Object modified by analytics_designer, analytics_des... on 28/07/2022

- ✓ Object Creator
- ✓ Folder Path
- ✓ Object Creation date
- ✓ Subject Area
- ✓ Type
- ✓ Subscribed
- ✓ Scheduled

Easily Share, Easily Schedule

“Shared with me” list available for all users

The screenshot displays the ExLibris Alma QA interface. At the top, there is a navigation bar with search and user options. Below it, the 'Analytics Object List' is shown with a 'Shared With Me' filter selected. A list of 12 analytics dashboards is visible on the left. The main content area shows details for the 'Acquisitions - Claims Dashboard (Ex Libris)', including a 'Report URL' field with a link icon. A 'Share With Roles (7)' section lists various roles like 'User Administrator' and 'Fund-Ledger Viewer'. At the bottom, a 'Schedule' dialog box is open, showing a 'Weekly' recurrence pattern starting on Monday at 09:00 AM.

Side by Side view

Quick link (permission limited)

Flexible Schedule component

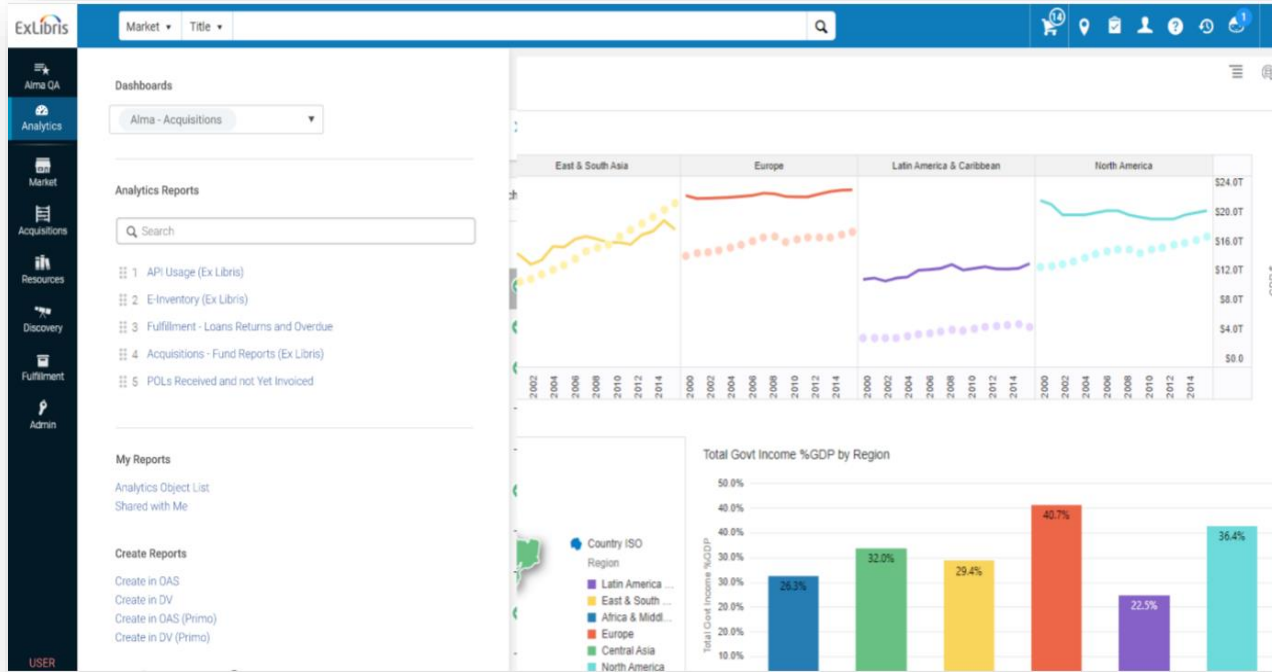
Object List: Immediate Preview of Report Information

The screenshot displays the ExLibris Analytics reports interface. The top navigation bar includes the ExLibris logo, a search bar with 'Market' and 'Title' filters, and a user profile icon. The main content area is titled 'Analytics reports (1 - 20 of 253)'. Below the title, there are filters for 'Report Name', 'Sort by: Modification Date', 'Type: All', 'Subject Area: All', and 'Permission: All'. A red box highlights the first report in the list, showing its details:

- Report name**
Subject Area Analytics Objects
Type OAS Report
- Report name**
Subject Area Analytics Objects
Type OAS Report
- Creator John Smith
Analytics folder Location/Location/Location
Creation date 02/02/2020
Modification date 02/02/2020
- Dashboard name**
Subject Area Analytics Objects
Type OAS Dashboard
Creator John Smith
Analytics folder Location/Location/Location
Creation date 02/02/2020
Modification date 02/02/2020
★ Report in favorites [View full report](#) ...
- Project name**
Subject Area Analytics Objects
Type Data Visualization
Creator John Smith
Analytics folder Location/Location/Location
Creation date 02/02/2020
Modification date 02/02/2020
★ Report in favorites [View full report](#) ...
- Report name**
Subject Area Analytics Objects
Type OAS Report
Creator John Smith
Analytics folder Location/Location/Location
Creation date 02/02/2020
Modification date 02/02/2020
★ Report in favorites [View full report](#) ...
- Dashboard name**
Subject Area Analytics Objects
Creator John Smith
Analytics folder Location/Location/Location
★ Report in favorites [View full report](#) ...

DV as Alma homepage: All in one place

Leading to a new approach on how to utilize data in the HEP platform!



Easily customize the Alma dashboard to present DV projects by your choice.

Roll out Schedule:

November release

Users will need to actively “Opt-in” to use the new analytics.

- ✓ rich and informative Side by side view
- ✓ Classic OAS preview
- ✓ rich report information and filtering
- ✓ One time, one place: Widget and scheduling in one unified “analytics object”
- ✓ User level analytics sharing (in addition to role and profile sharing)
- ✓ DV as HEP homepage dashboard

February-May releases

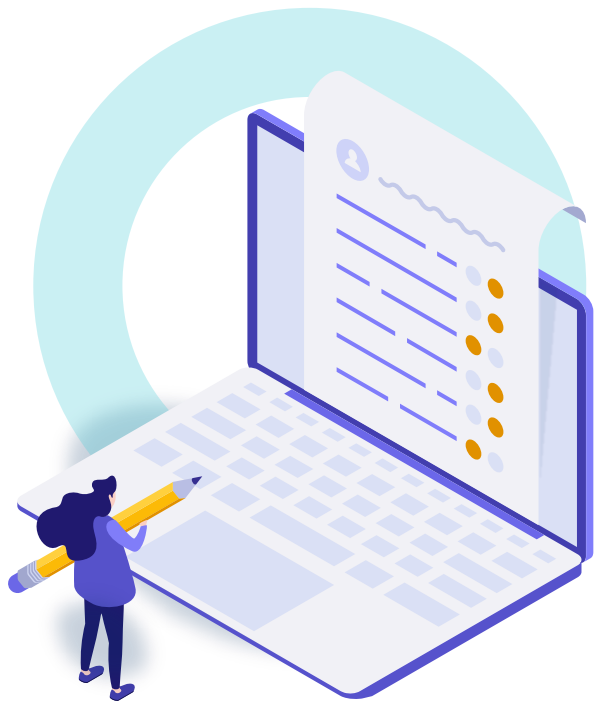
February release: Users will need to actively “Opt-out” of the new Analytics UI to work on the old version

May release: The old Analytics UI will no longer be available.

- ✓ Report Live links (Platform users only): scheduled and immediate sharing of “Live links”
- ✓ DV preview in side-by-side view
- ✓ and more...

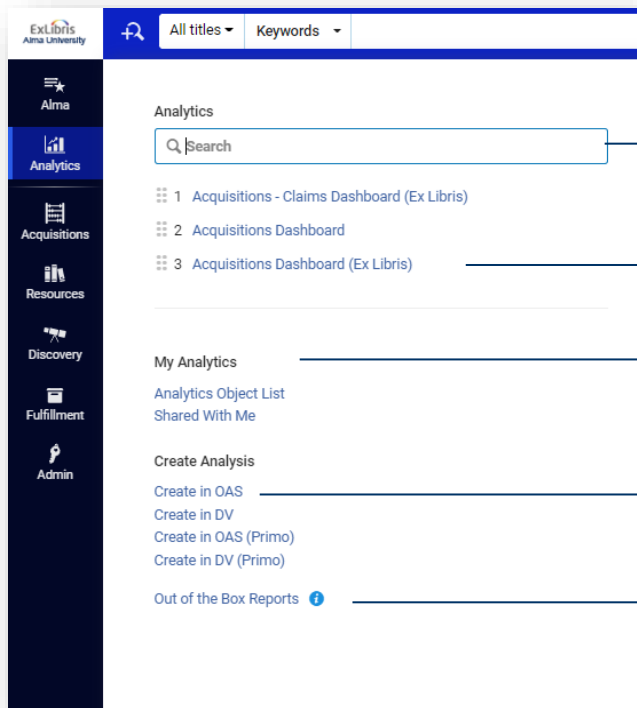


Thank you!



Appendix

New Menu



"Search" all "Analytics Objects" available (role/user dependent)

"Favorites Analytics" quick links defined by the user

"Analytics object list"-admins only, Analytics object management.

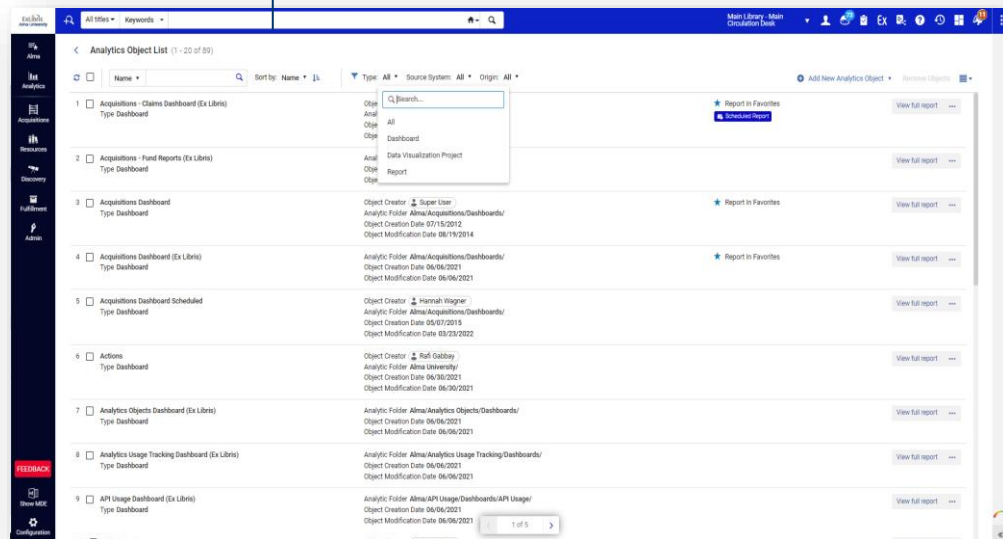
"Shared with me" – All user. Includes all objects shared with user/role

Create Analytics area for Analytics Designer

"Out of The Box Reports" created by Ex Libris. separated from institutional reports

New Object List: Immediate Preview of Report Properties

Inner search in object list with report properties as facets



Properties

- Object Creator
- Folder Path
- Object Creation date
- Subject Area (November release)
- Type

Additional indications in the list

(colorful icons from November release):

- Subscribed
- Scheduled

New Object List: Side By side View and Actions

Main Library - Main Circulation Desk

Type: All Source System: All Origin: All

Add New Analytics Object Remove Objects

Sections View full report

Acquisitions - Claims Dashboard (Ex Libris)

Type Dashboard

Description Acquisitions - Claims Dashboard (Ex Libris)

Object Creator Rafi Gabbay

Analytic Folder /shared/Alma/Acquisitions/Dashboards/

Object Creation Date 06/06/2021

Object Modification Date 08/03/2022

Share With Roles (7)

User Administrator User Manager Fund-Ledger Viewer License Manager Purchase Request Manager Trial Manager Trial Operator

Add From Profiles

Schedule

Schedule Report

Recurrence Pattern Weekly

Subscribe

Format PDF FTP

Scheduled Report Notification

Report Preview

View full report

Scheduling

Schedule report

Edit Recurrence

Recurrence pattern Weekly

Recur every 1 * week(s) on

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

At 09:00 AM

Cancel Save

Add Objects

Actions

- Remove

- Add/remove from favorites (from November release)

Report properties

(Admin clicks on form to edit
See next page for more details)

Sharing options: Roles and profiles

Flexible Schedule component-
Admin clicks on form to edit,
Viewer has "View mode" only

Individual subscription to
reports - available for both
admin and viewer roles

Analytics Preview

(currently unavailable in DV15)

Part of Clarivate

Unified Object (Object Type)

Unlike the old Analytics UI, the new Analytics UI takes a more unified approach towards analytics objects and does not consider “Scheduled report/dashboard” and “Widget” as separate objects. They all fall under the specific category they belong in Oracle Analytics Server. The scheduling and widget options depend on limitations that exist in OAS or in Analytics as shown below:

Object Type	Schedule (pdf/excel/Text /CSV)	Widget	Live Link Schedule (Alma Users Only)* (phase 2: November or February release)	Alma homepage Dashboard* (phase 2: November or February release)
Report (OAS)	YES	YES	YES	NO
Dashboard (OAS)	YES	NO	YES	NO
Data Visualization (DV)	NO	NO	YES	YES

“Add Analytics Object” form

The screenshot shows the 'Add Analytics Object' form with the following fields and annotations:

- Analytic Folder ***: Value: Alma/Acquisitions/Dashboar...
Annotation: Autofill- Folder search to locate reports (same as Old UI)
- Report Name ***: Value: Acquisitions Dashboard
Annotation: Name imported from OAS. Not editable
- Display Name ***: Value: Acquisitions Dashboard 2
Annotation: Display name refers only to the Object and does not affect OAS report. This field is auto filled but editable.
- Description**: Value: Acquisitions Dashboard ...
Annotation: Auto fills from "Name but editable. Phase 2 will expected to pull Description from description in OAS if there is one
- Type**: Value: Dashboard
- Subject Areas**: Value: Funds Expenditure
Annotation: Auto fills Subject Area identified from OAS (not editable). Available in November release
- Object Creator**: Value: Staff, Ex Libris
Annotation: Auto filled. Cannot edit.
- Object Creation Date**: Value: 11/08/2021
- Object Modification Date**: Value: 28/07/2022

Buttons: Reset, Save