



Creating and Managing Analytics Objects

Exercises for Attendees

Ex Libris Knowledge Days, May 2023

Before starting, ensure the new Alma analytics user interface is [enabled](#).

Exercise 1: Add Analytics Widget to Alma Home Page

1. Open the **Analytics** menu and choose **Analytics Objects List**
2. Notice what happens when you change the **Type** filter to **Dashboard** or **Report**.
3. Select **Actions > Add New Alma Analytics Object**
4. Title: **Missing Items**
5. Analytic Folder: **[your institution] / [your choice of folder]**
6. Report Name: **[pick a report of your choice]**
7. Display Name: **[change if needed]**
8. Click **Save**
9. Add Roles: **[as desired, but make sure you have at least one of the roles]**
 - a. Note: Only Alma users with these roles will be able to add this Widget to their Alma home page.
10. Check **Add as widget** box
11. Go to **Alma Home** page
12. Add the Widget report you just created

Exercise 2: Create Default Dashboard Object Accessible from Analytics Objects Menu

1. Alma menu **Analytics > Analytics Objects List**
2. **Actions > Add New Alma Analytics Object**
3. Analytic Folder: **Alma / Cost per use via COUNTER reports e-inventory and acquisitions data / Dashboards**
4. Report Name: **Electronic Cost Usage Dashboard**
5. Click **Save**

6. Add Roles: **[as desired, but make sure you have at least one of the roles]**
7. From the **More actions** menu, choose **Add to Favorites**

Exercise 3: Create Default Report Object and Schedule it to be Sent to Alma and Non-Alma Users

To make a default, out-of-the-box report available as an Analytics Object, you first need to copy the report into your institution folder:

1. Alma menu **Analytics > Access Analytics**
2. Open **Catalog**
3. Navigate to folder: **Shared Folders / Alma / Cost per use via COUNTER reports e-inventory and acquisitions data / Reports**
4. Find **Cost Per Use by Usage Type** and choose **More > Copy**
5. Navigate to folder: **Shared Folders / [your institution] / [subfolder of your choice]**
6. Tasks: **Paste**
7. In your subfolder, open **Cost Per Use by Usage Type** (just to see how it looks)

Switch browser tabs back to **Alma** to create the Analytics Object.

1. Alma menu **Analytics > Analytics Object List**
2. **Actions > Add New Alma Analytics Object**
3. Analytic Folder: **[your institution] / [subfolder]**
4. Report Name: **Cost Per Use by Usage Type**
5. Click **Save**
6. Add Roles: **[as desired; users with these roles will be able to subscribe to the report themselves]**
7. Add Users: **[as desired]**
8. Toggle **Schedule Report**
9. Select **Recurrence Pattern** section
10. Choose the **recurrence pattern** and **date/time** you want the report to be sent
11. Select **Format** section
12. Choose the **format** you want the report to be sent.
 - a. If you choose a link, the recipient(s) will need to have an Alma account. And when the recipient clicks the link, they will see the current analytics data from that day, which may not be the day the link was sent. On the other hand, if you choose an attachment, the report will be current to the time/date it was sent.
13. If you want the report attachment sent to an **FTP** server, check that box and choose the **FTP Configuration**.
14. Select **Manage Subscription**
15. Add **Subscribers** as desired.