Creating and Managing Analytics Objects in the New Alma User Interface

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Welcome and Introduction

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- **Introduction**
- Add Analytics Widget to Alma Home Page
- Create Analytics Dashboard Object and Set as Favorite
- Create Report Object
- Create Scheduled Report to be sent to Alma and non-Alma Users
- Common Problems to Avoid
- Hands-On Exercise

Introduction

- An Alma Analytics Object is an entity in Alma that allows for easy access to an Alma Analytics report or dashboard.

- The types of objects are:

  - Dashboard

  - Scheduled Dashboard

  - Report

  - Scheduled Report

  - Widget

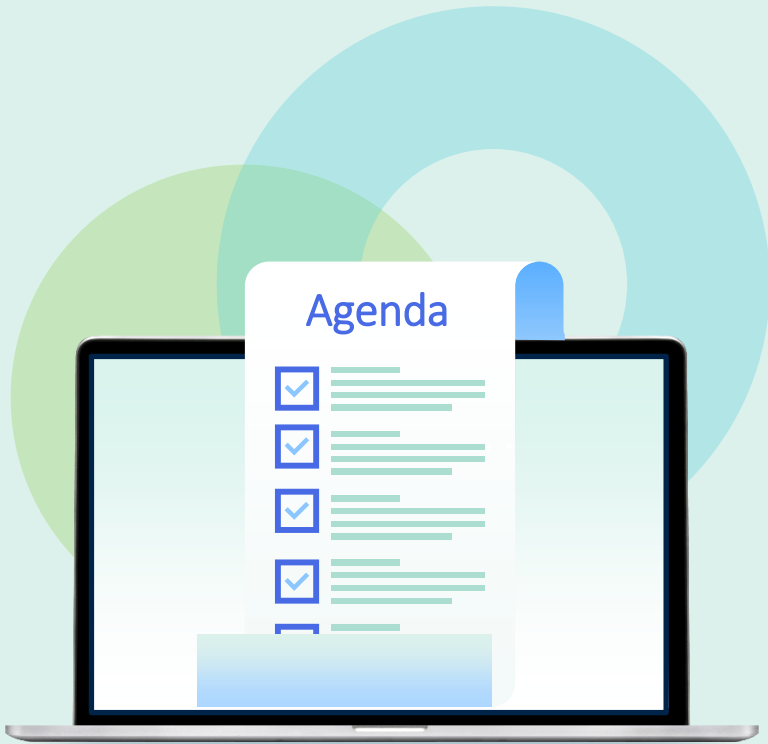# Which Reports and Dashboards Can Become Objects?

Only reports and dashboards in the following folders in the analytics Catalog can become analytics Objects for sharing:

- Shared Folders / **Alma** – created by Ex Libris staff
- Shared Folders / **[your institution ID]** – created by staff at your institution
- Shared Folders / **[Leganto] [Rapido] etc** – if you have that service
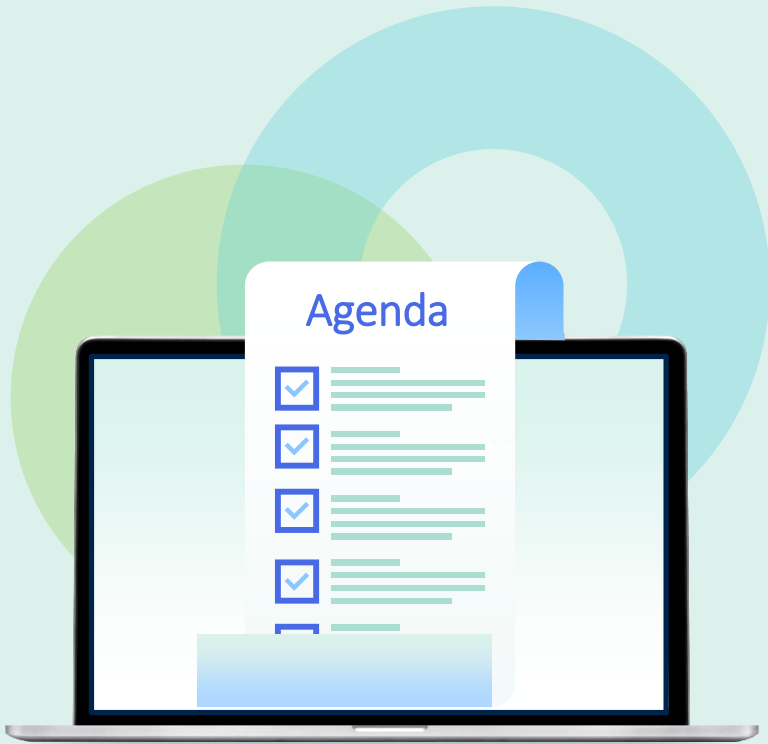
- All subfolders within the above are also available

What Do Other Alma Users See?

A subset of saved
dashboards and reports,
depending on their Alma
roles

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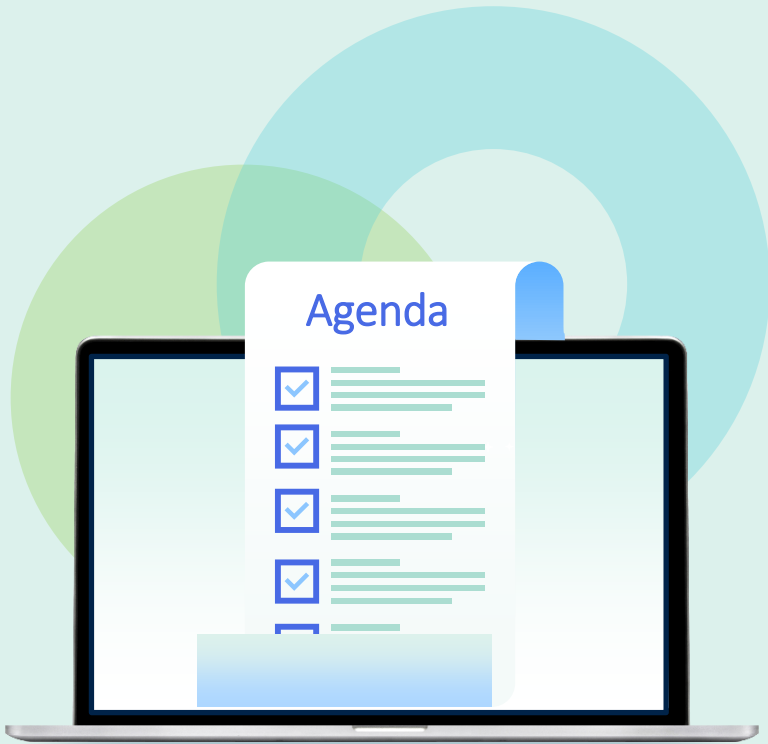- Common Problems to Avoid
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Common Problems to Avoid

- Dashboard objects can contain dashboards from the Alma folder (created by Ex Libris staff), but Report objects must come from your institution's folder

- Reports sent by email will use the Analytics Letter, so that needs to be configured and enabled

- Try to avoid special characters in filenames or folder names (especially the slash /)

- Helpful to organize in folders in the analytics Catalog: Dashboards, Reports, Widgets

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Hands-On Exercise

- Use your Alma Sandbox or your regular (Production) environment

- Log in as a user with role **Analytics Administrator**

Exercise Steps

1. Analytics Menu > **Analytics Object List**

2. Actions > **Add New Alma Analytics Object**

3. Analytic Folder: **[your institution folder]**

4. Report Name: **[pick a report]**

5. **Save**

6. Wait for it ... !

Exercise Steps (cont.)

7. In analytics object editor, add **Roles** as desired

    - Be sure to include Analytics Administrator

8. Select **Add to Favorites**

9. Find report on **Analytics** menu

10. Enjoy your handiwork!

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Conclusion

Additional Resources

- Alma Analytics Documentation

  - Knowledge Center > Alma > Online Help > Analytics
    - [Scheduling and Subscribing to Alma Analytics Reports](#)

- Training Videos

  - Knowledge Center > Alma > Training > Analytics
  - Ex Libris YouTube Channel – search for Alma Analytics

- Custom Training

  - Premium.Services@exlibrisgroup.com

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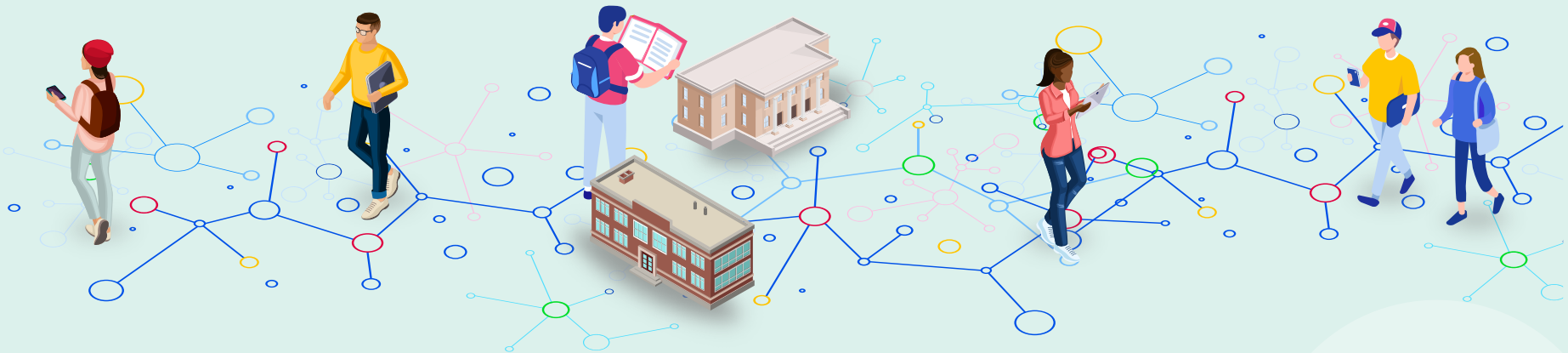Part of **Clarivate**

Exercises

Try creating other analytics objects.

Go to:

Ex Libris Knowledge Center > 2023 Knowledge Days

Find this session and download the Exercise file

Question Time

Thank you!

https://forms.office.com/r/JicFRsxVgD

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