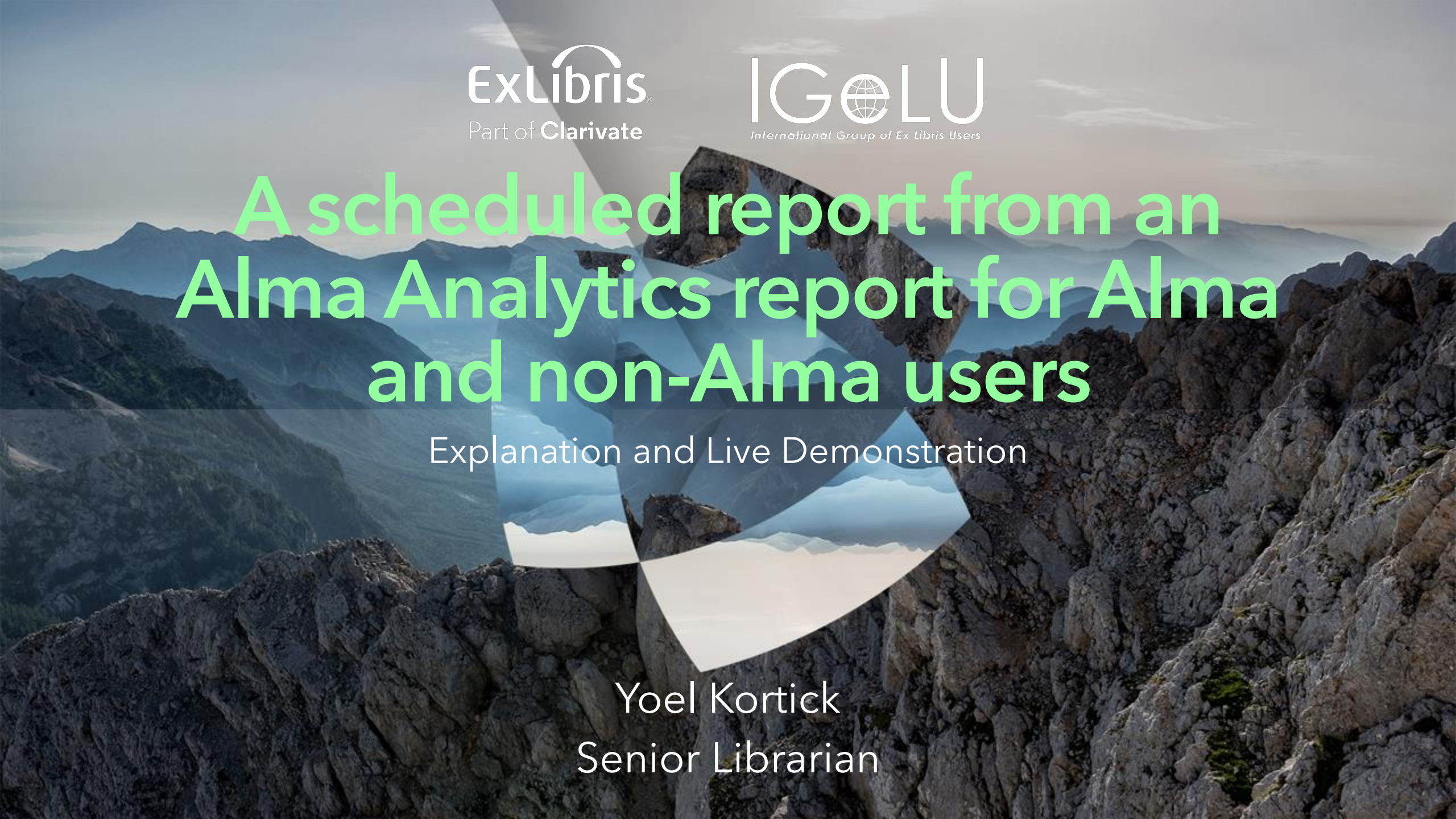

Ex Libris
Part of Clarivate
IGeLU
International Group of Ex Libris Users
A scheduled report from an Alma Analytics report for Alma and non-Alma users
Explanation and Live Demonstration
Yoel Kortick
Senior Librarian

Introduction

Creating an analytics object

Subscribing to and receiving the scheduled report

Ex Libris Part of Clarivate

IGeLU International Group of Ex Libris Users

# Introduction

# Introduction

- There may be cases where the library has created a useful report, chart or graph in Alma analytics and certain librarians, or other staff of the institution which are not registered Alma users, will want to receive it as an email attachment on a regular basis
- This may be done by creating a scheduled report
- After the scheduled report is created
  - Each librarian can choose to subscribe to the report depending on his or her roles.
  - The analytics administrator can define that the report will be sent to any email – even for people not registered as Alma users

# Introduction

- In this presentation we will show and example using the following report:
- Name: “Count of Loans and Renewals in current year”
- Directory location:  “ Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects”

# Introduction

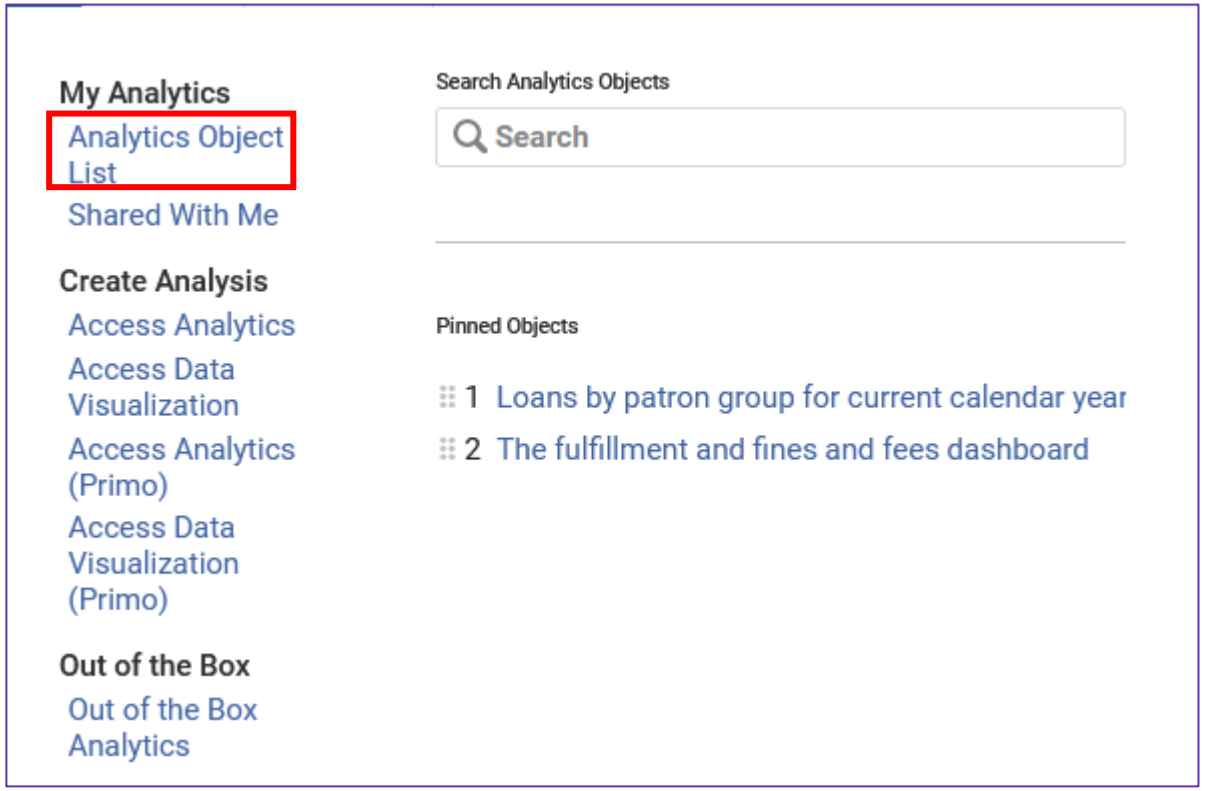
- This is the report which we want to send as a scheduled report:

| User Group | Loans (Not In House) | Renewals |
|---|---|---|
| Administrative Staff | 410 | 74 |
| Alumni | 121 | 3 |
| Faculty | 189 | 49 |
| Graduate Student | 289 | 38 |
| Undergraduate Student | 1,619 | 207 |

# Creating an analytics object

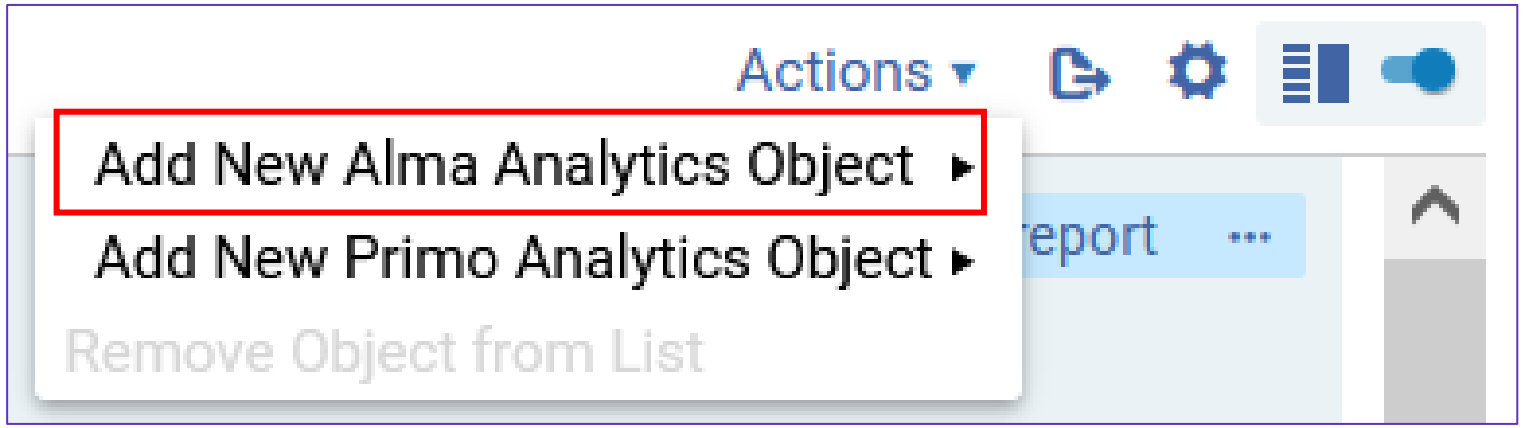
# Creating an analytics object

- Select “Analytics > My Analytics > Analytics Objects List”



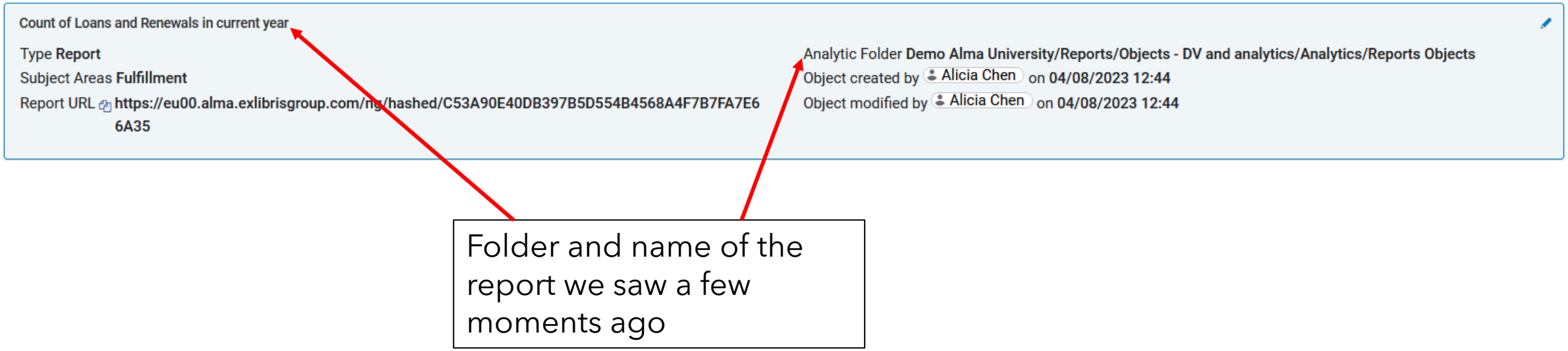
# Creating an analytics object

- Then we will choose (on the top right) “Actions > Add New Analytics Object”



# Creating an analytics object

- Choose the folder and report.  Optionally update the display name.



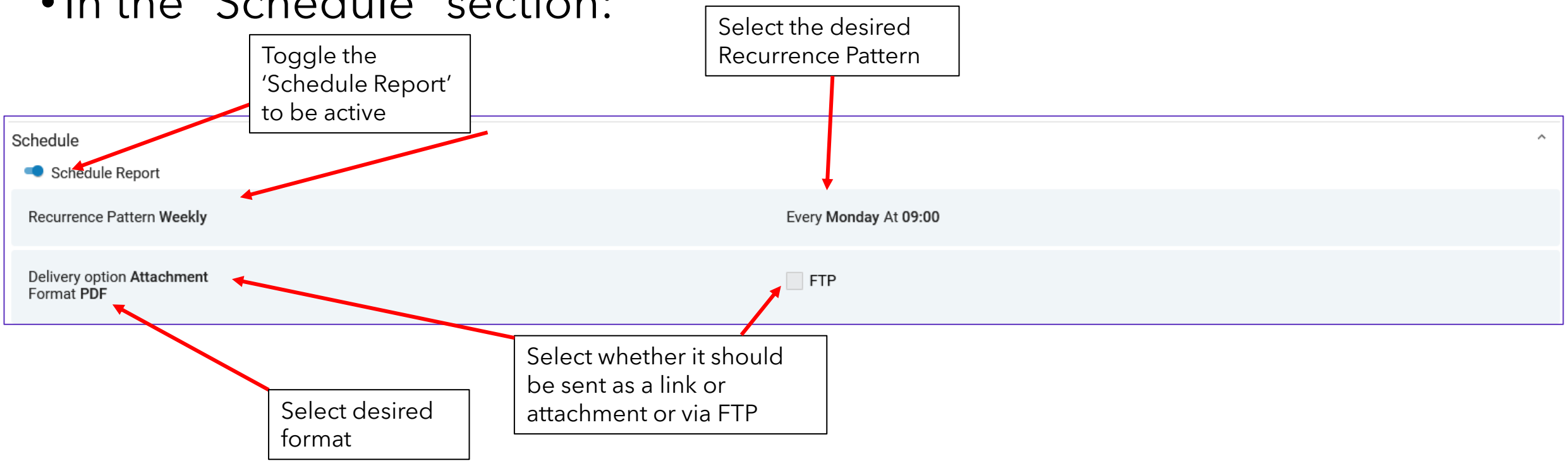
# Creating an analytics object

- In the “Schedule” section:

1. Toggle the ‘Schedule Report’ to be active
2. Select the desired Recurrence Pattern
3. Select whether it should be sent as a link or attachment or via FTP
4. Select desired format

# Creating an analytics object

- In the “Schedule” section:

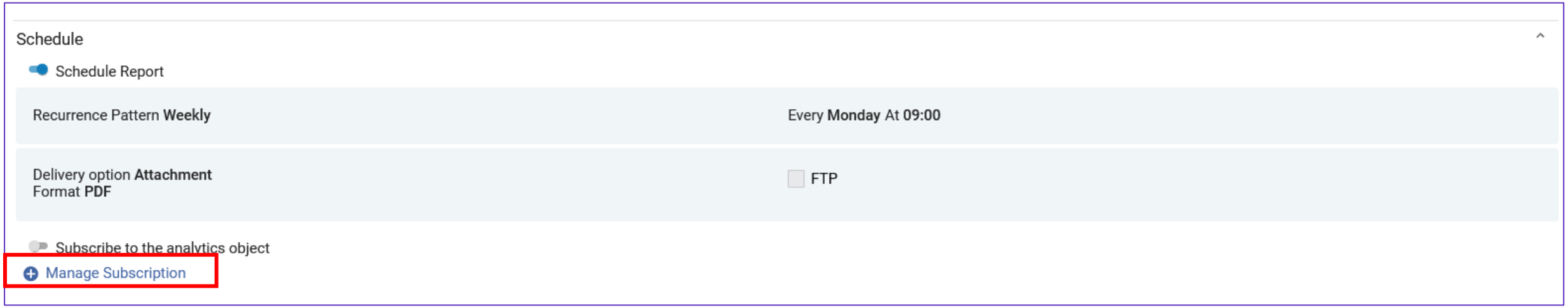


# Creating an analytics object

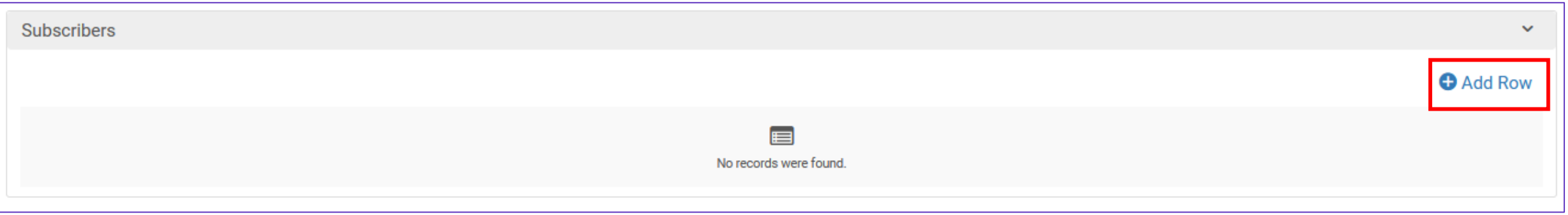
- If you would like to add non-Alma users to receive the scheduled report:

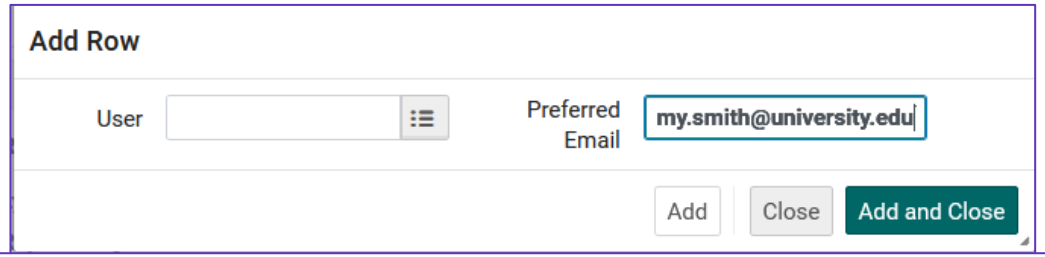
1. Click “Manage Subscription” in the “schedule” section.
2. Click “Add Row”
3. Add the email of the non-Alma user in the “Preferred Email” field

# Creating an analytics object



# Creating an analytics object

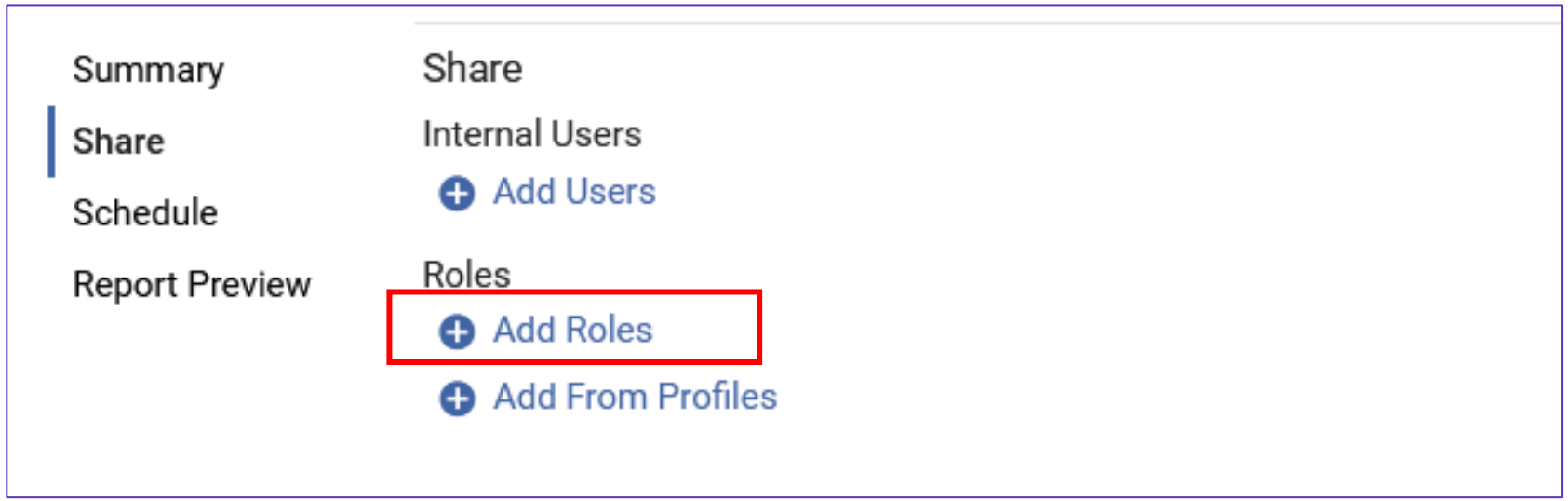


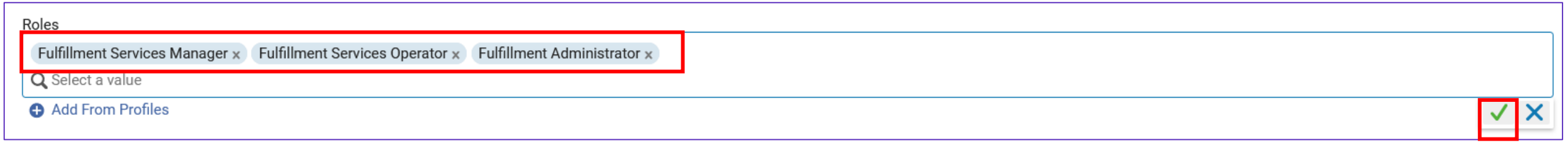
## Creating an analytics object

- Add the roles of the users who will be able to “subscribe” to this scheduled report.
- In our case, because the report deals with fulfillment, it would be relevant to add fulfillment roles (and not for example physical electronic inventory roles)
- In the “Share” section, “Roles” subsection, click “Add Roles”
- Add the desired roles

# Creating an analytics object



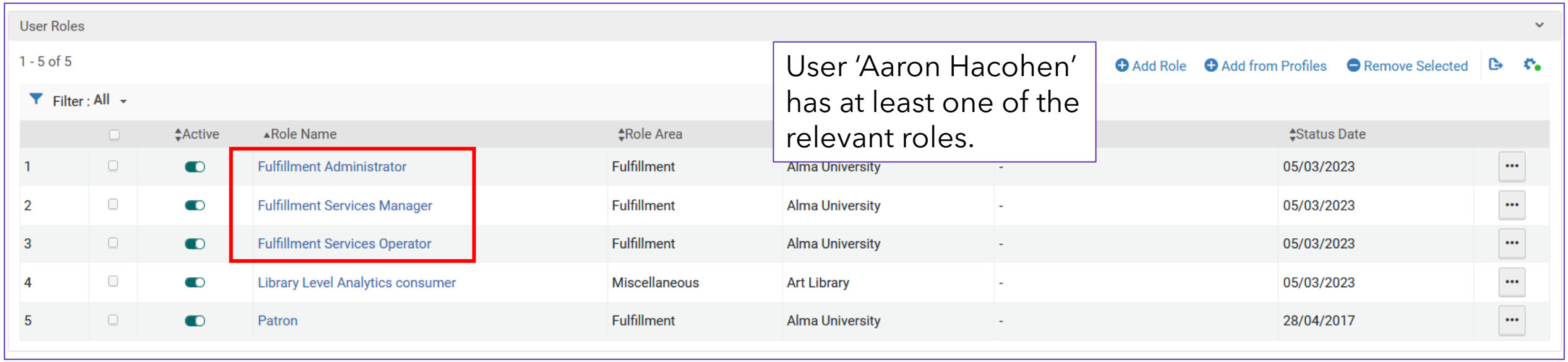
# Creating an analytics object



# Subscribing to and receiving the scheduled report

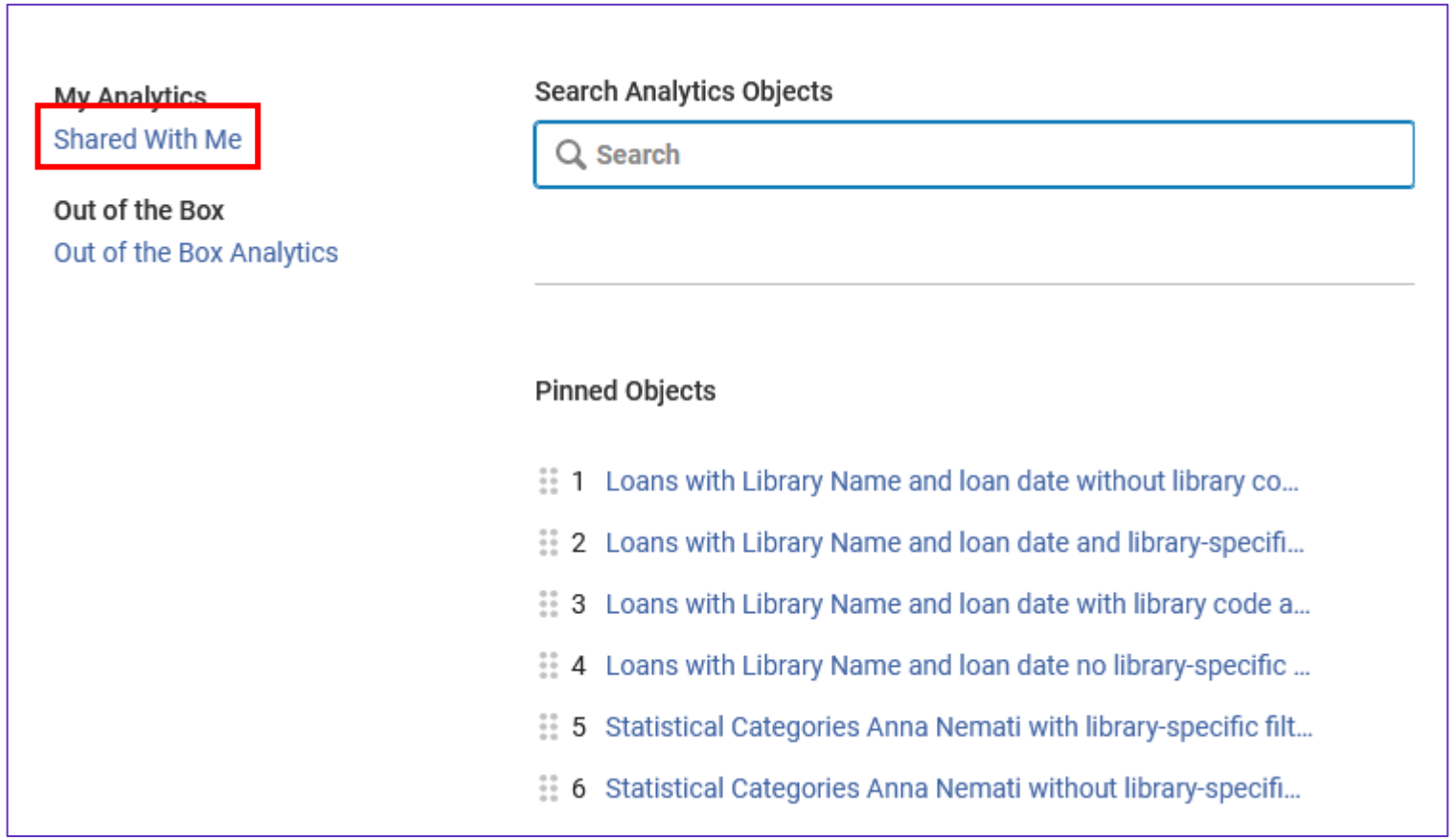
# Subscribing to and receiving the scheduled report

- Alma users with at least one of the relevant roles defined in the scheduled report can subscribed to the scheduled report.



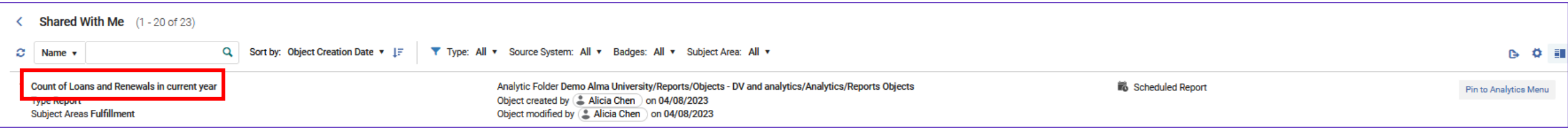
# Subscribing to and receiving the scheduled report

- User ‘Aaron Hacohen’ logs in and does “Analytics > My Analytics > Shared With Me”



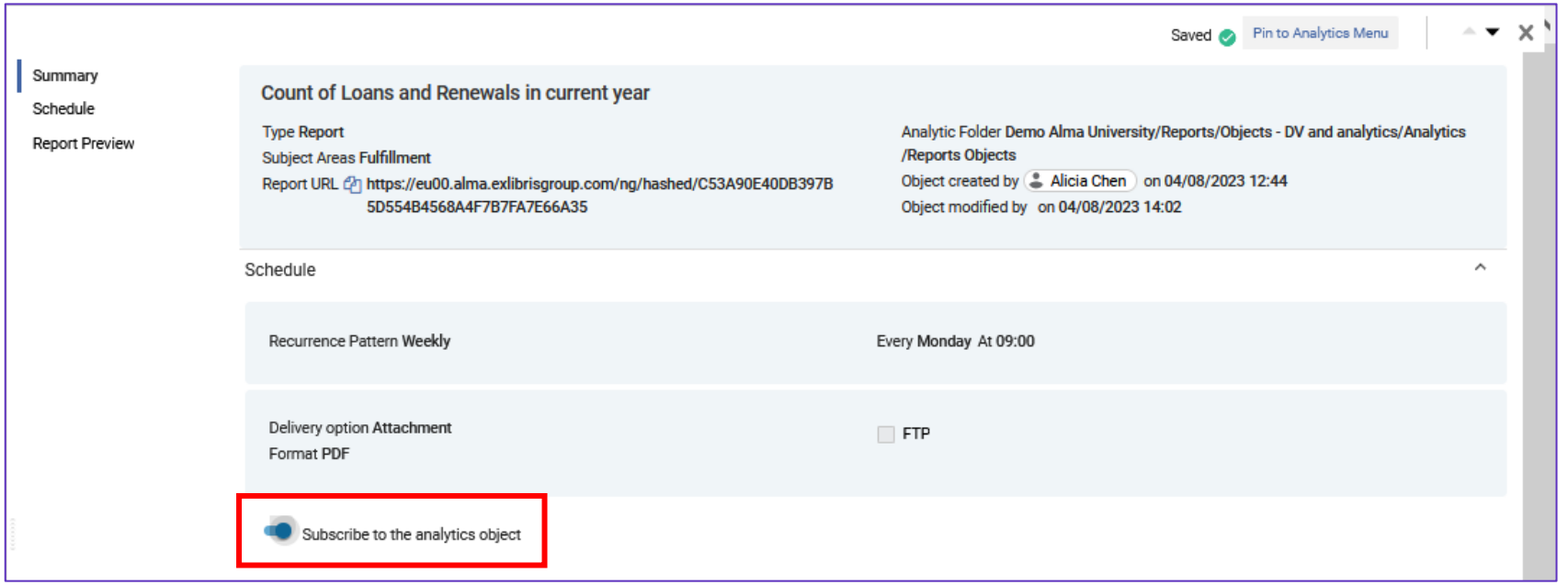
# Subscribing to and receiving the scheduled report

- The “Shared With Me” shows all analytics objects which have at least one role which the logged in user has.
- The logged in user can then click on the object to open it



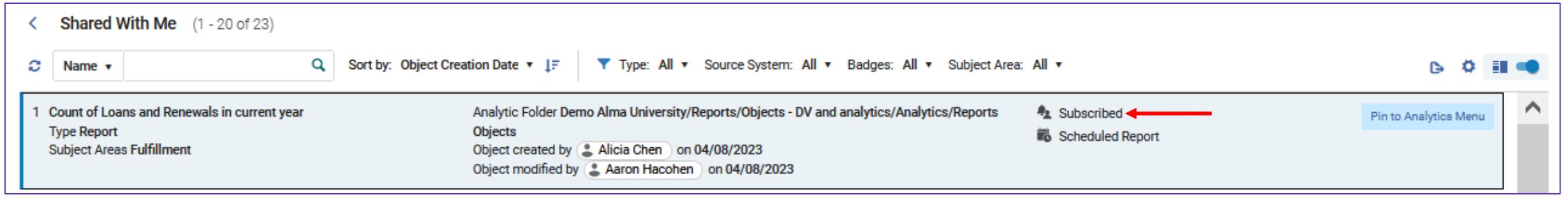
# Subscribing to and receiving the scheduled report

- Then the logged in user will subscribe to the report



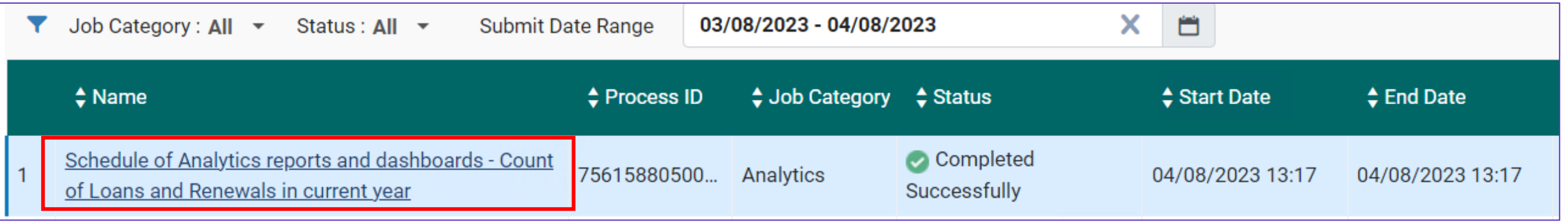
# Subscribing to and receiving the scheduled report

- There is a clear indication to the user that he or she is subscribed.



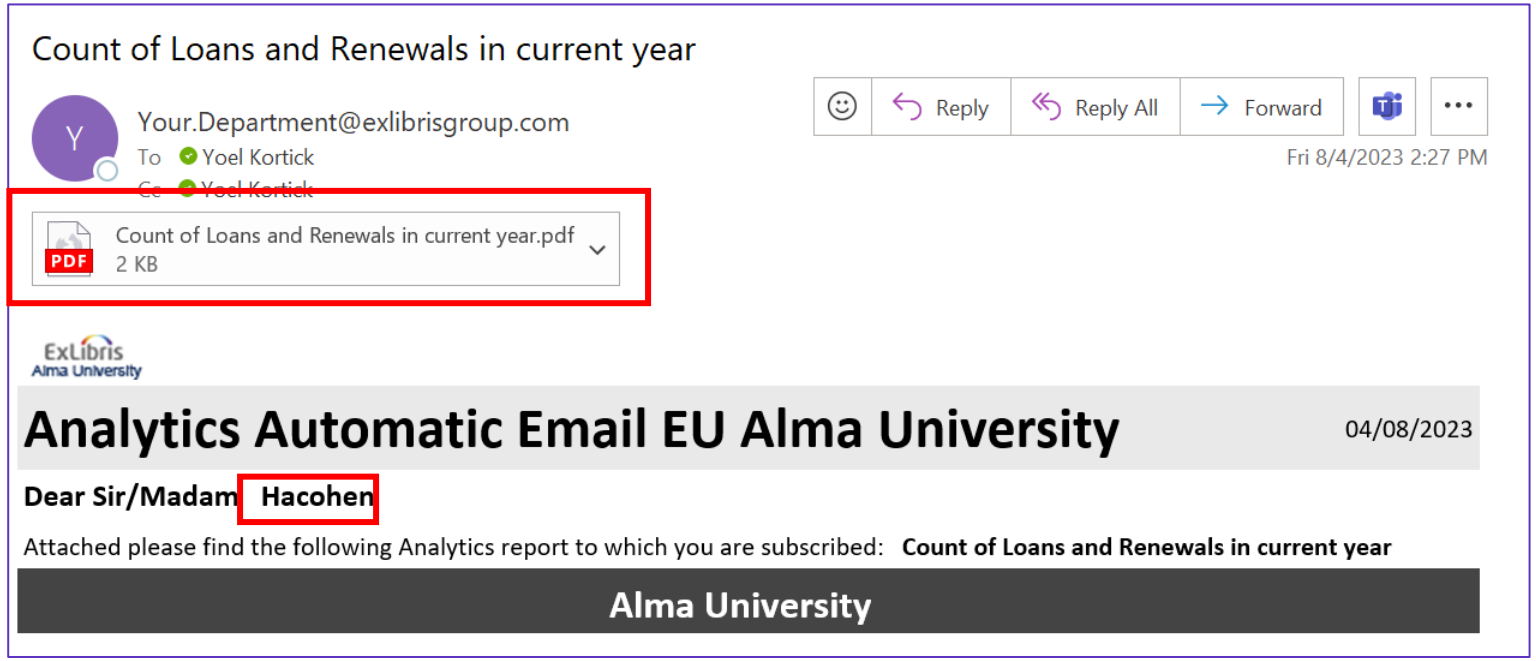
# Subscribing to and receiving the scheduled report

- The scheduled job which sends the scheduled reports runs and completes.



# Subscribing to and receiving the scheduled report

- The user gets the email with the attachment.



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# Analytics Menu Entries in Alma

## Introduction

Yoel Kortick
Senior Librarian

# The analytics menu entries

Ex Libris Part of Clarivate
IGeLU International Group of Ex Libris Users

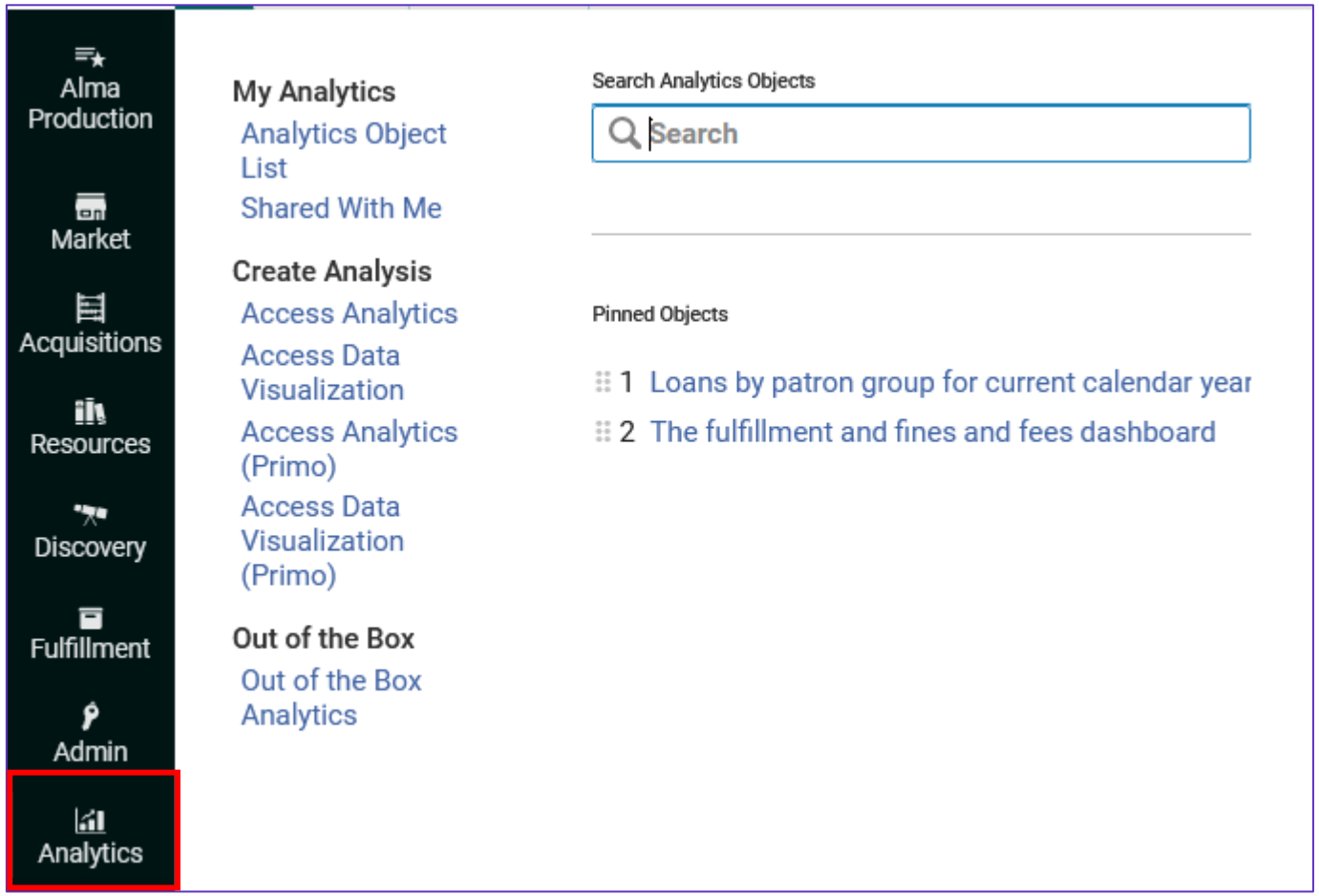
# The analytics menu entries

# The analytics menu entries

- First, we will give a general overview of each entry in the analytics menu.
- Then we will “deep dive” into each of these menu entries.

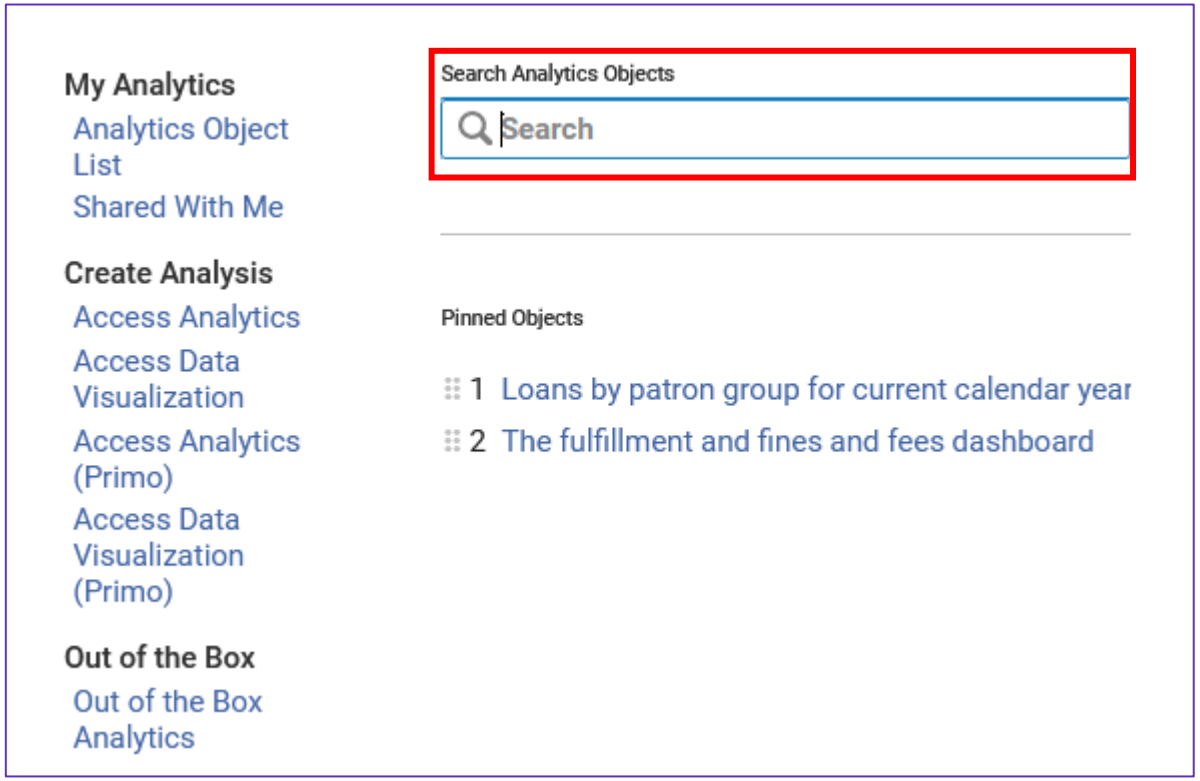
# The analytics menu entries

- Accessing the analytics menu



# The analytics menu entries

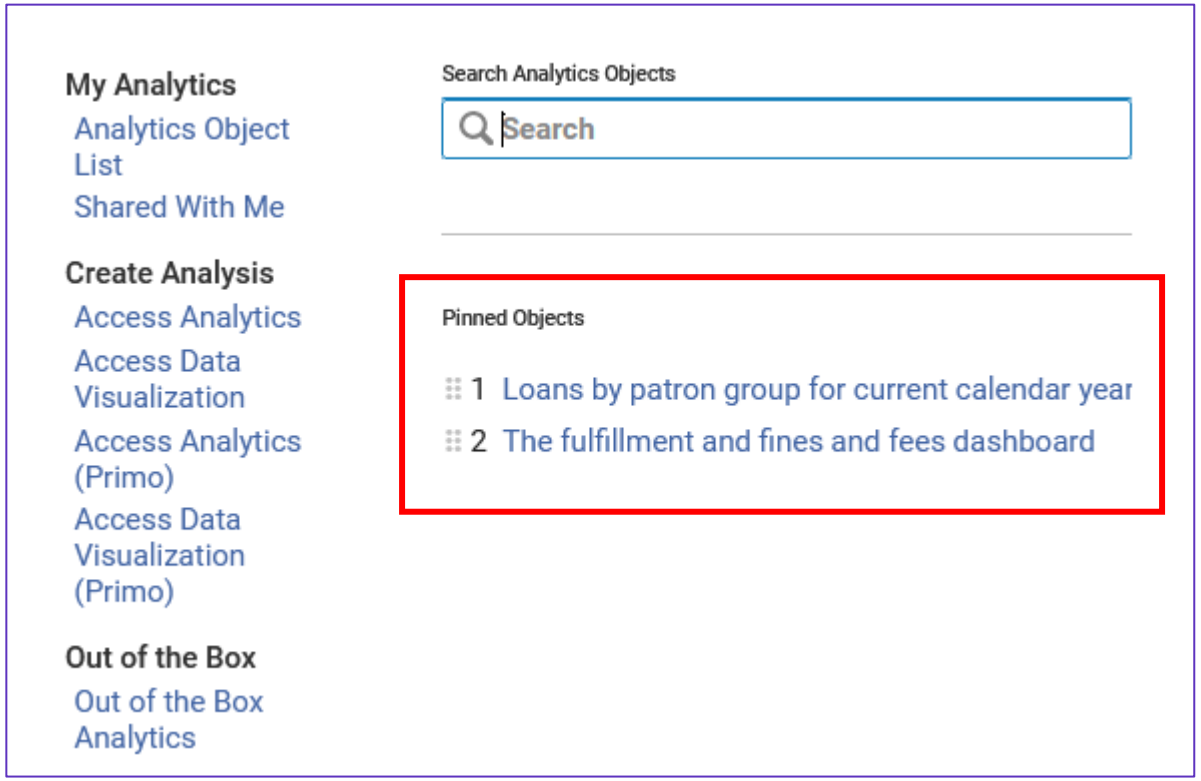
- Search: Allows the user to "Search" all "Analytics Objects" available to the logged in user depending on his or her roles.



# The analytics menu entries

- Pinned Objects: These serve as “quick links” which the user can quickly access by clicking on them.

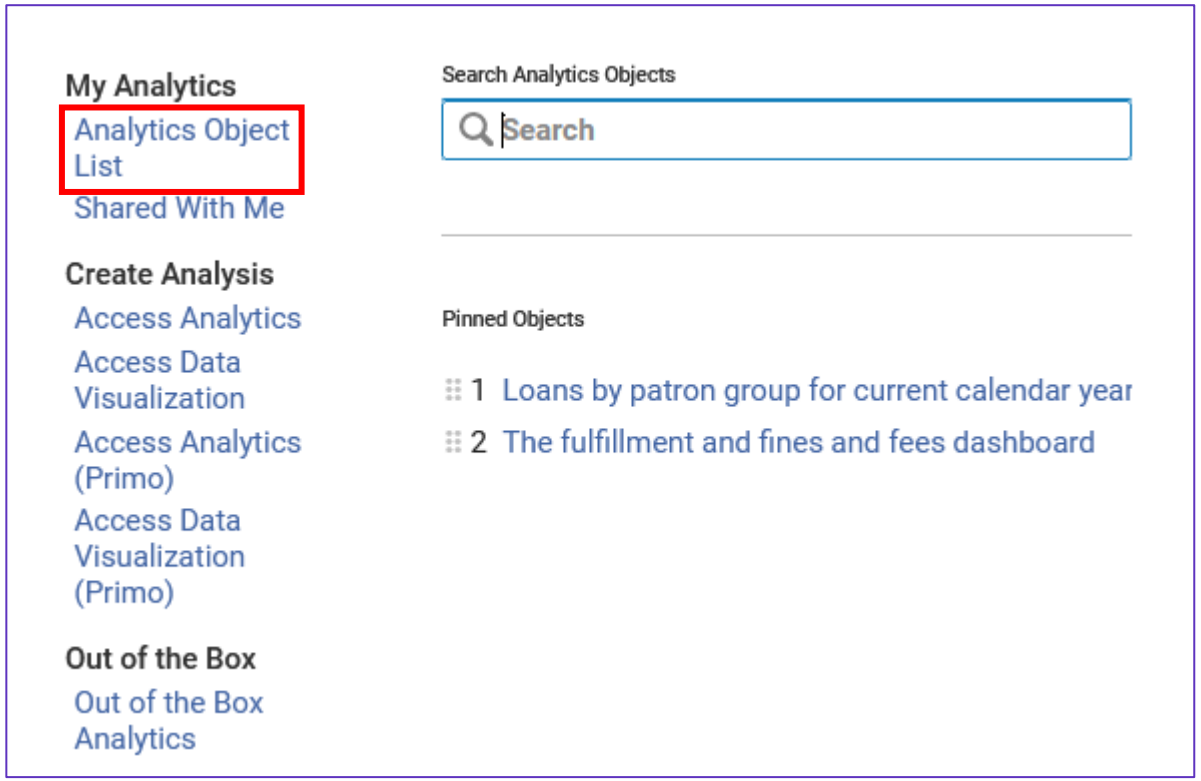
Each user decides which objects will be his or her Pinned Objects.



# The analytics menu entries

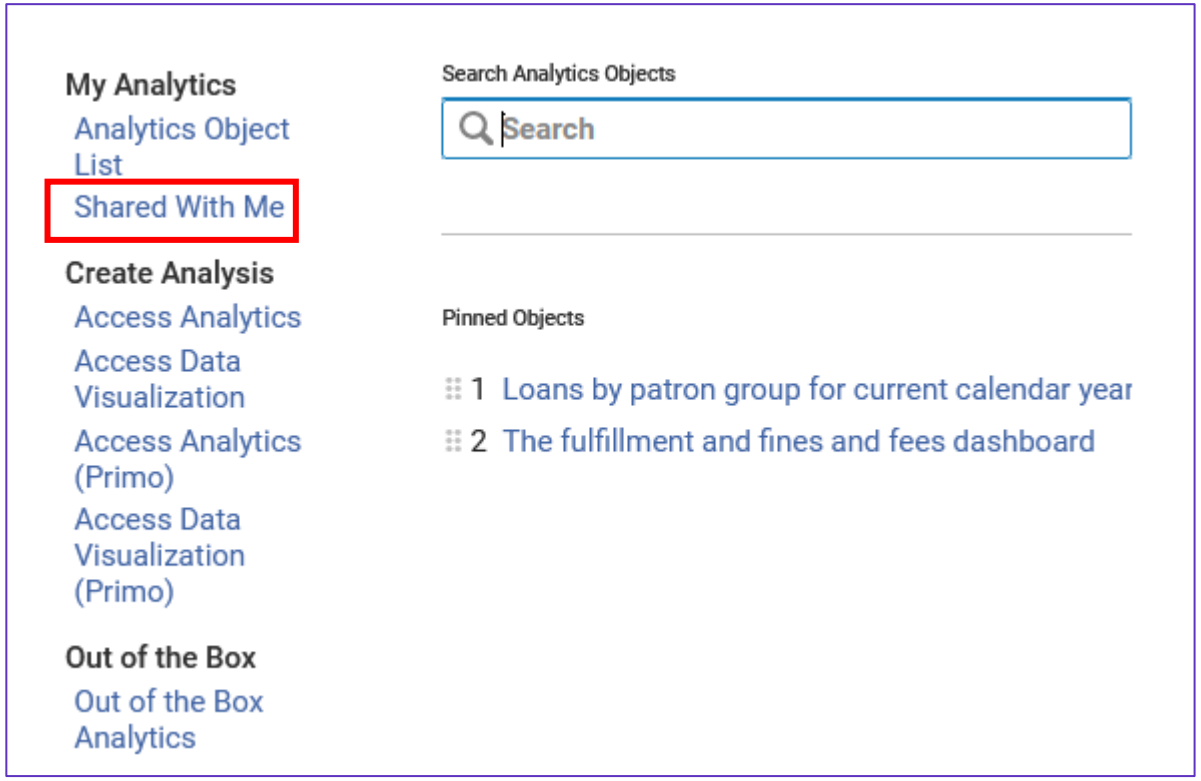
- "Analytics object list"- The list of analytics objects.

In order for a staff user to see the "Analytics Object List" entry he or she must have either role "Analytics Administrator" or role "General System Administrator" or both.



# The analytics menu entries

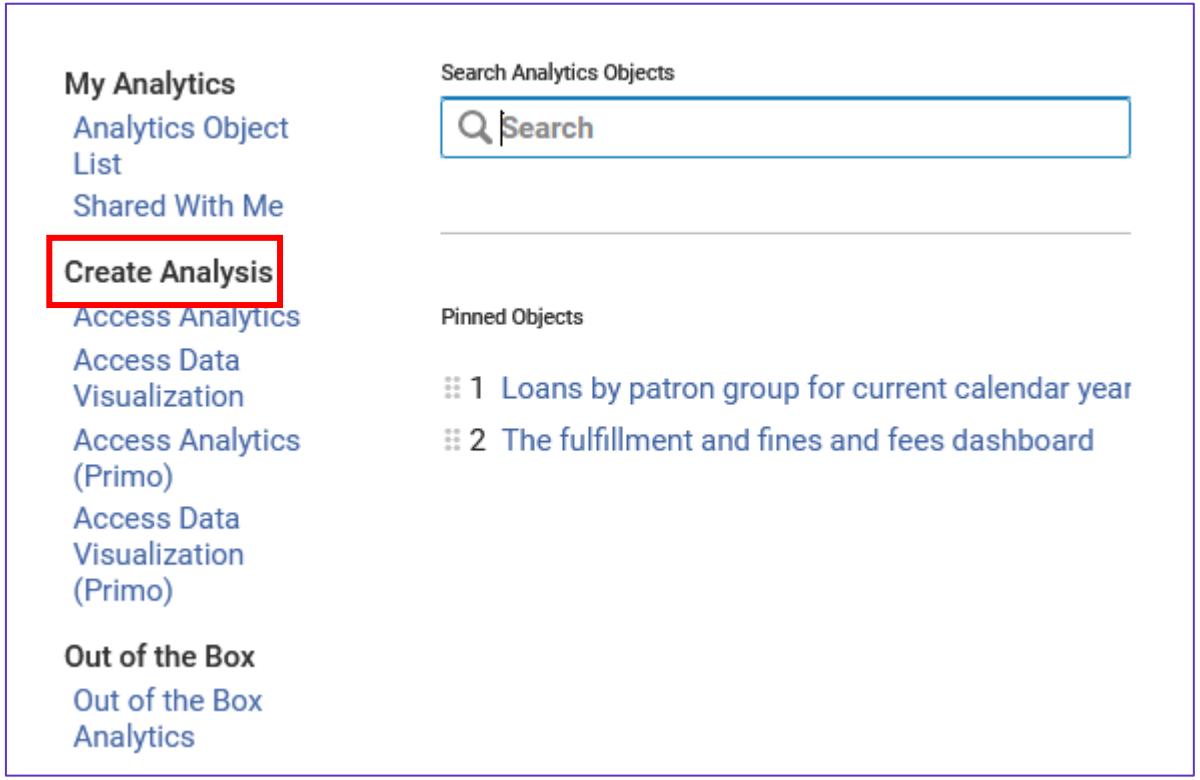
- “Shared with me”- The list of analytics objects shared with the user in accordance with his or her roles.



# The analytics menu entries

- "Create analysis"- This is the section for the user with role "Designs Analytics".

The four entries which begin "Access …" allow the staff user to enter analytics or data visualization to create, edit and delete analytics analyses and data visualization worksheets.



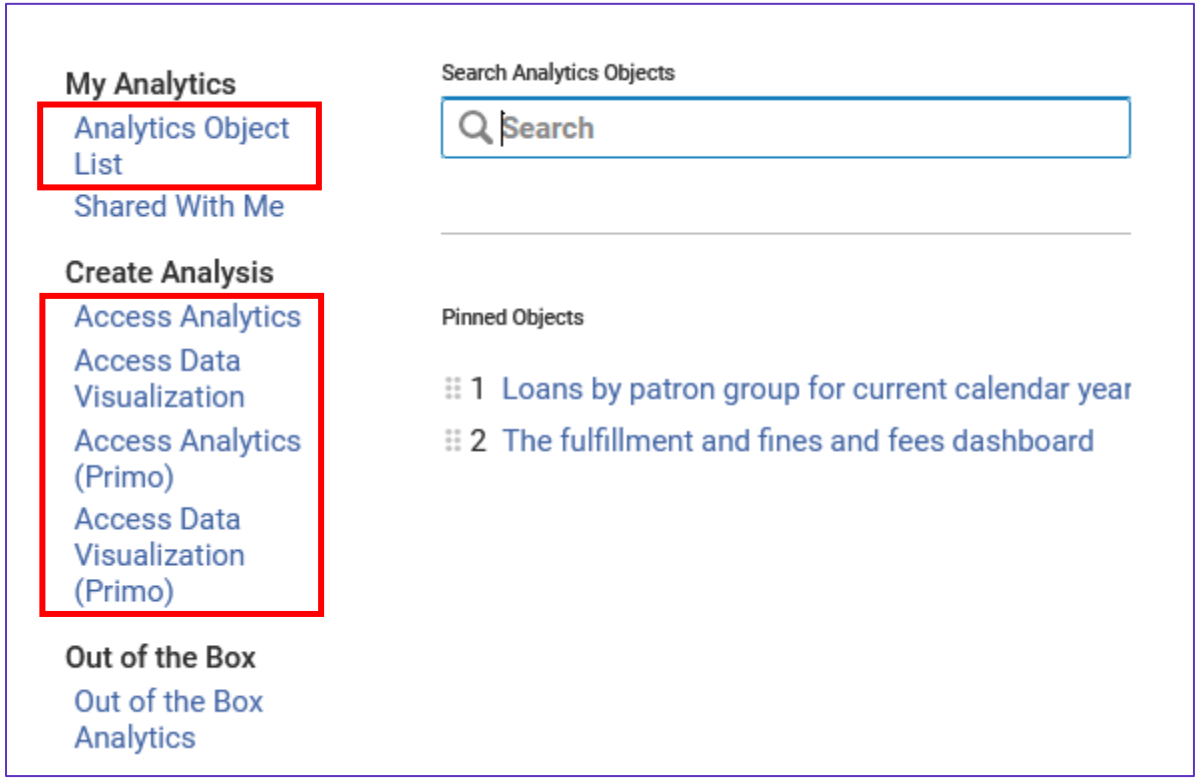
# The analytics menu entries

- The section “Create Analysis” will only appear if the logged in user has role ‘Designs Analytics’

- The entry “Analytics Object List” will only appear of the logged in user has role ‘Analytics Administrator’ or ‘General System Administrator’

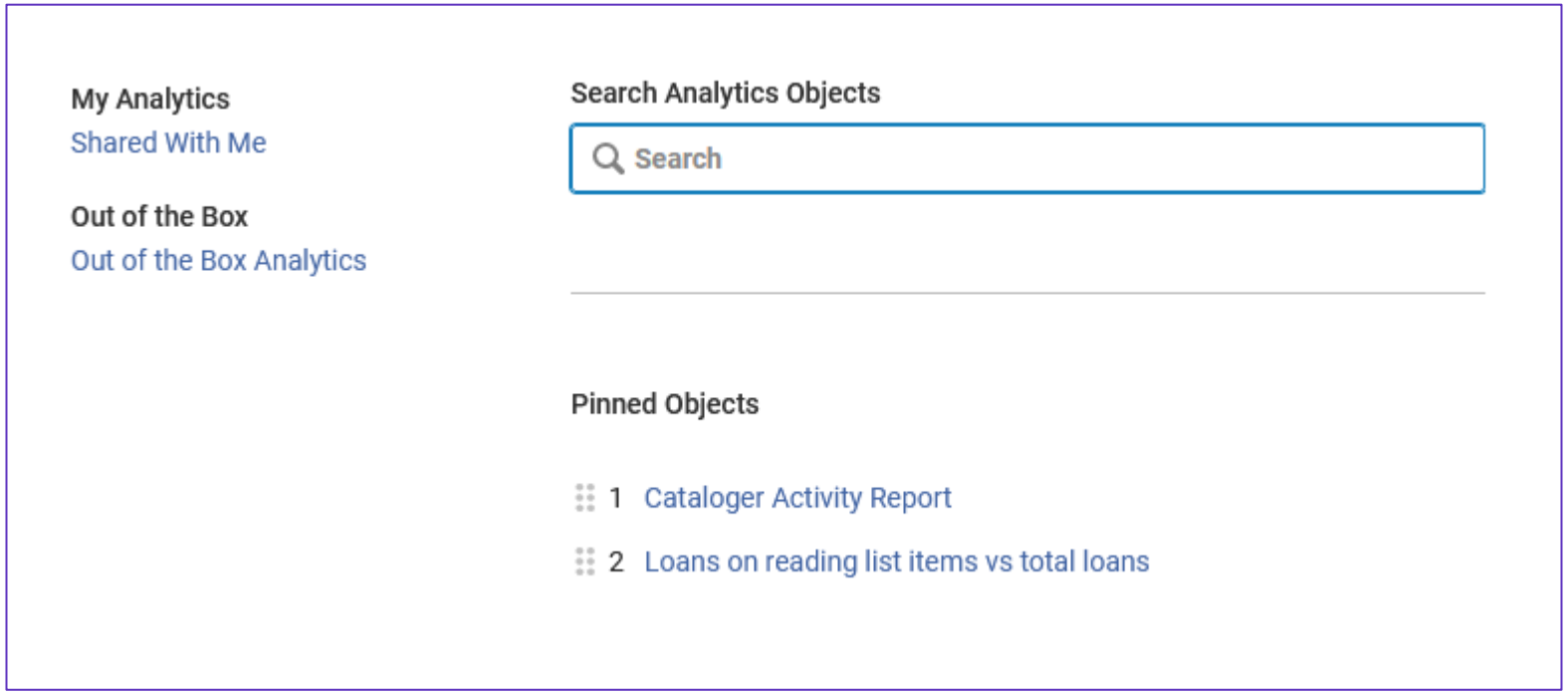
# The analytics menu entries

- Here the logged in user (Alicia Chen) **does** have role 'Designs Analytics' and 'Analytics Administrator' and 'General System Administrator'.



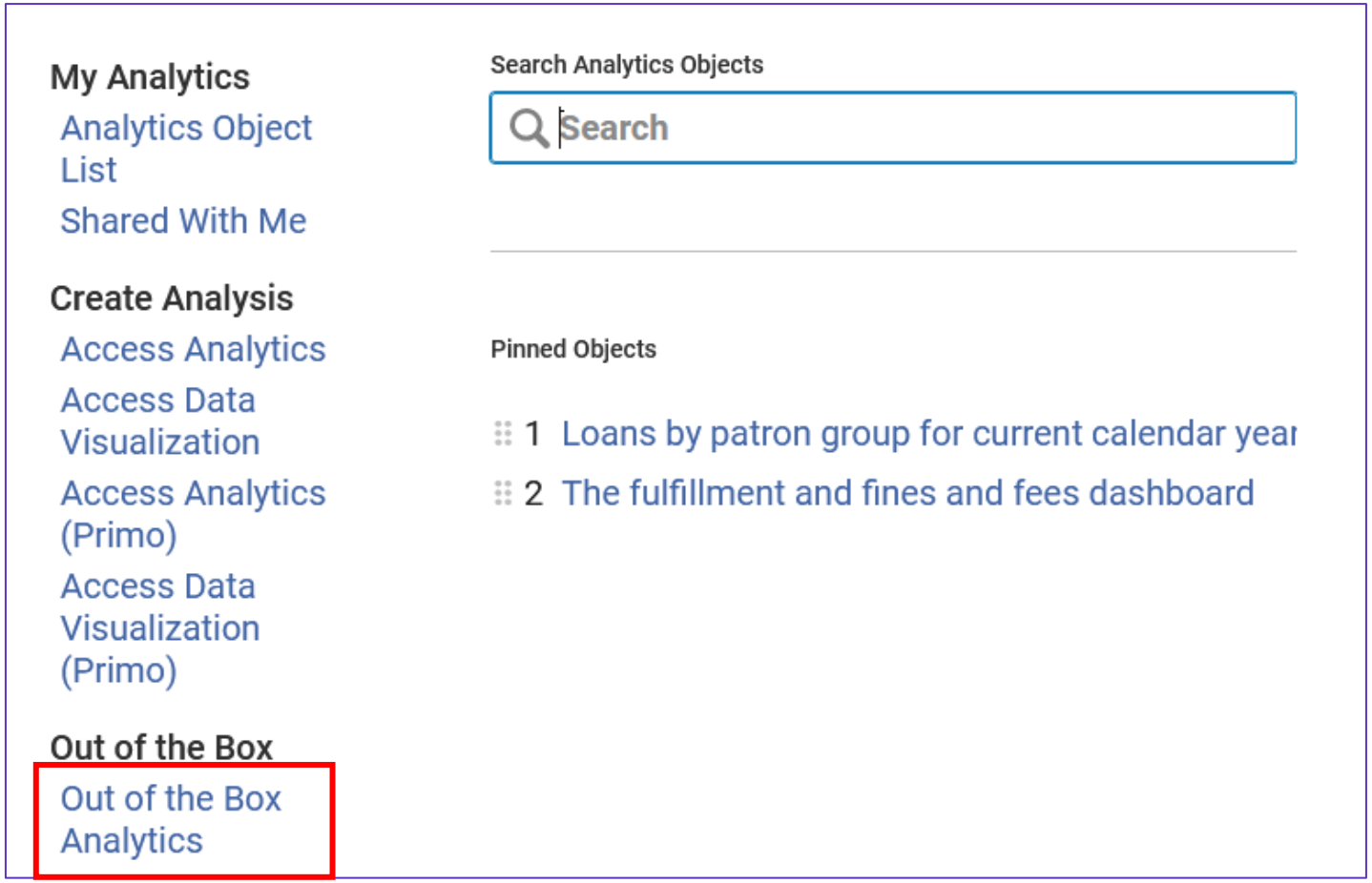
# The analytics menu entries

- Here the logged in user (Elly May Clampett) does **not** have role 'Designs Analytics' or 'Analytics Administrator' or 'General System Administrator'.
- This user has only the role "Cataloger" and therefore does not see the section "Create Analysis" or the entry 'Analytics Object List'



# The analytics menu entries

- Out of the box analytics: The list of analytics objects which are from the “Alma” folder and have the same role applied as the logged in user



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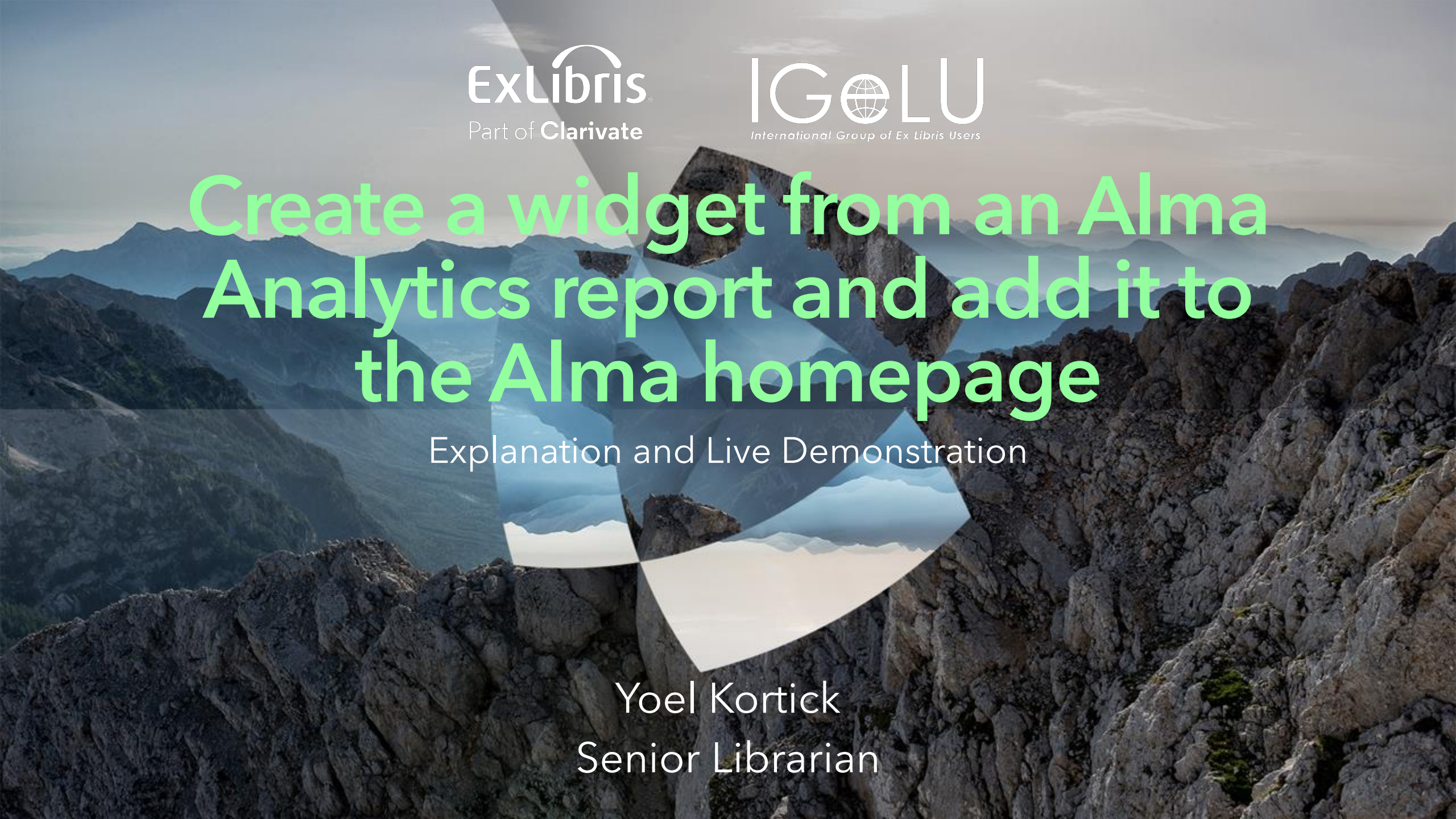
Ex Libris
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Create a widget from an Alma Analytics report and add it to the Alma homepage
Explanation and Live Demonstration
Yoel Kortick
Senior Librarian

Introduction

Creating an analytics object

Adding the widget to the Alma homepage

Ex Libris Part of Clarivate

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# Introduction

# Introduction

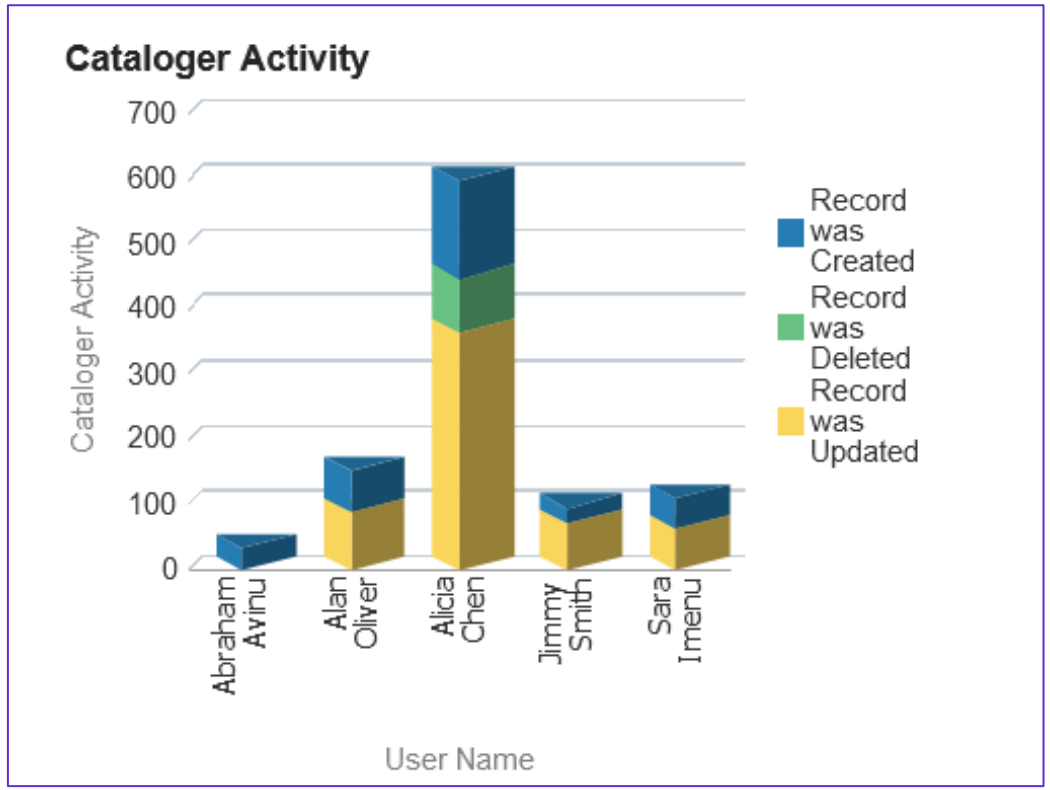
- There may be cases where the library has created a useful chart or graph in Alma analytics and certain librarians will want to add it to their Alma homepage
- This may be done by creating an Analytics object of type Widget
- After the widget is created
  - Each librarian can choose to add the widget to his or her Alma homepage depending on his or her roles.

# Introduction

- In this presentation we will show and example using the following Analytics report:
- Name: “Cataloger Activity”
- Directory location: /shared/Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets”

# Introduction

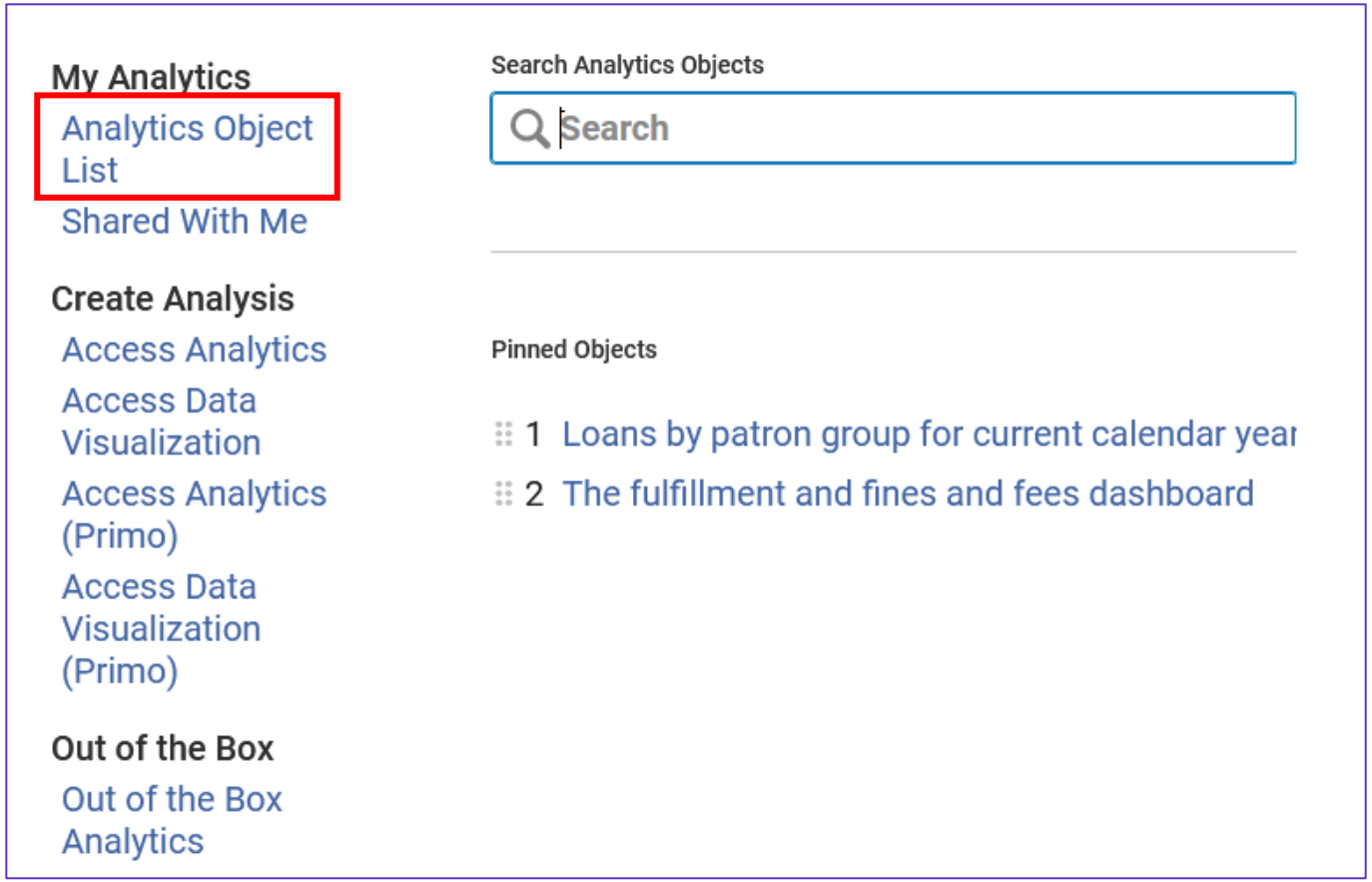
- This is the report which we want to create as a widget:



# Creating an analytics object

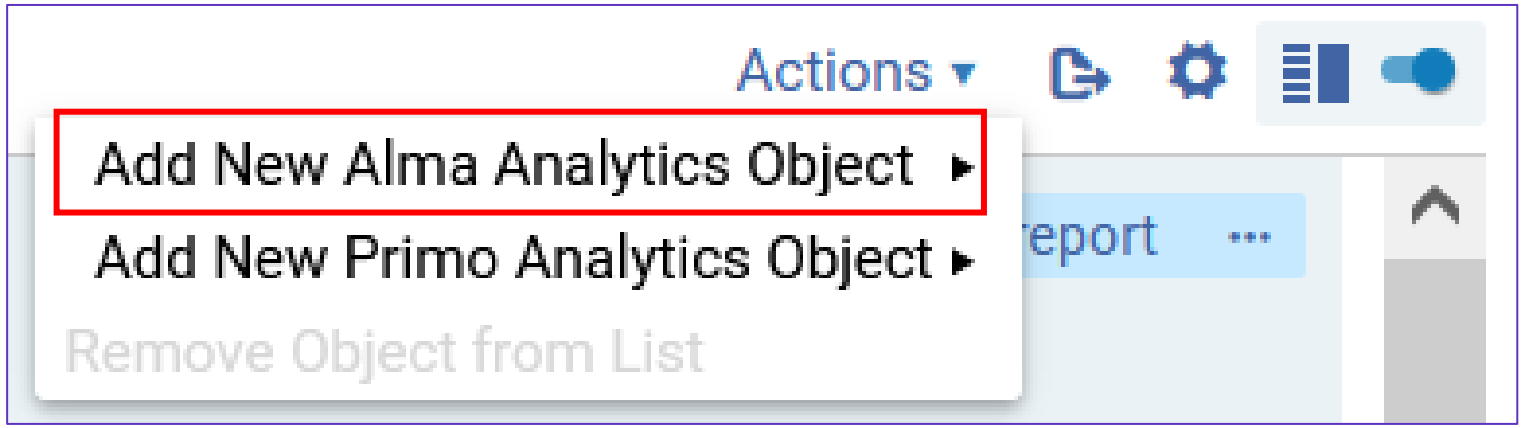
# Creating an analytics object

- Select “Analytics > My Analytics > Analytics Objects List”



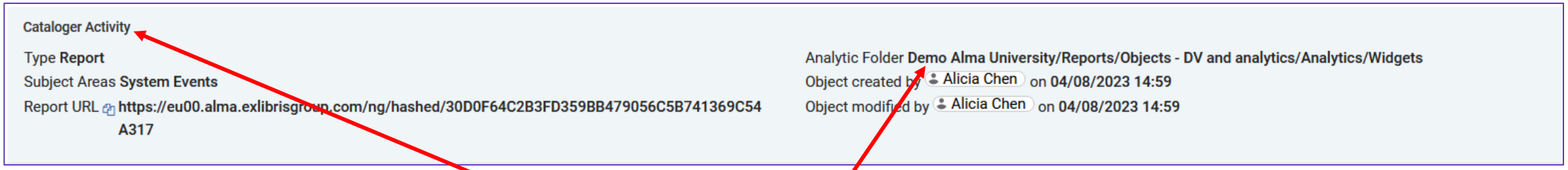
# Creating an analytics object

- Then we will choose (on the top right) “Actions > Add New Analytics Object”



# Creating an analytics object

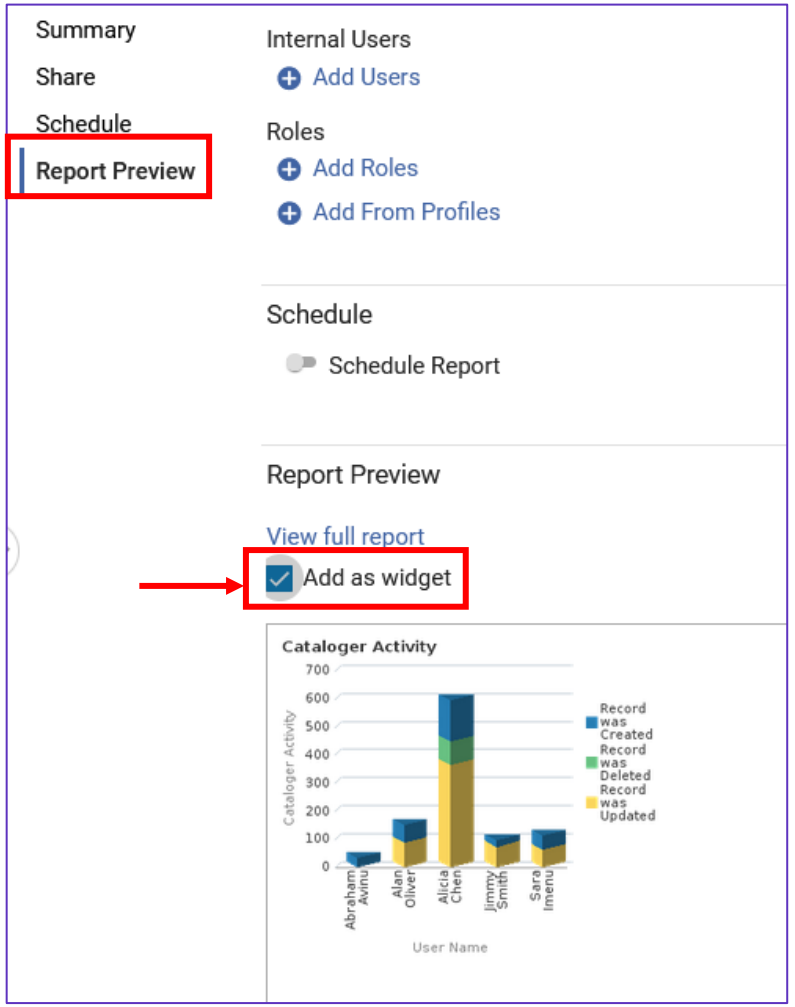
- Choose the folder and report.  Optionally update the display name.




Folder and name of the report we saw a few moments ago

# Creating an analytics object

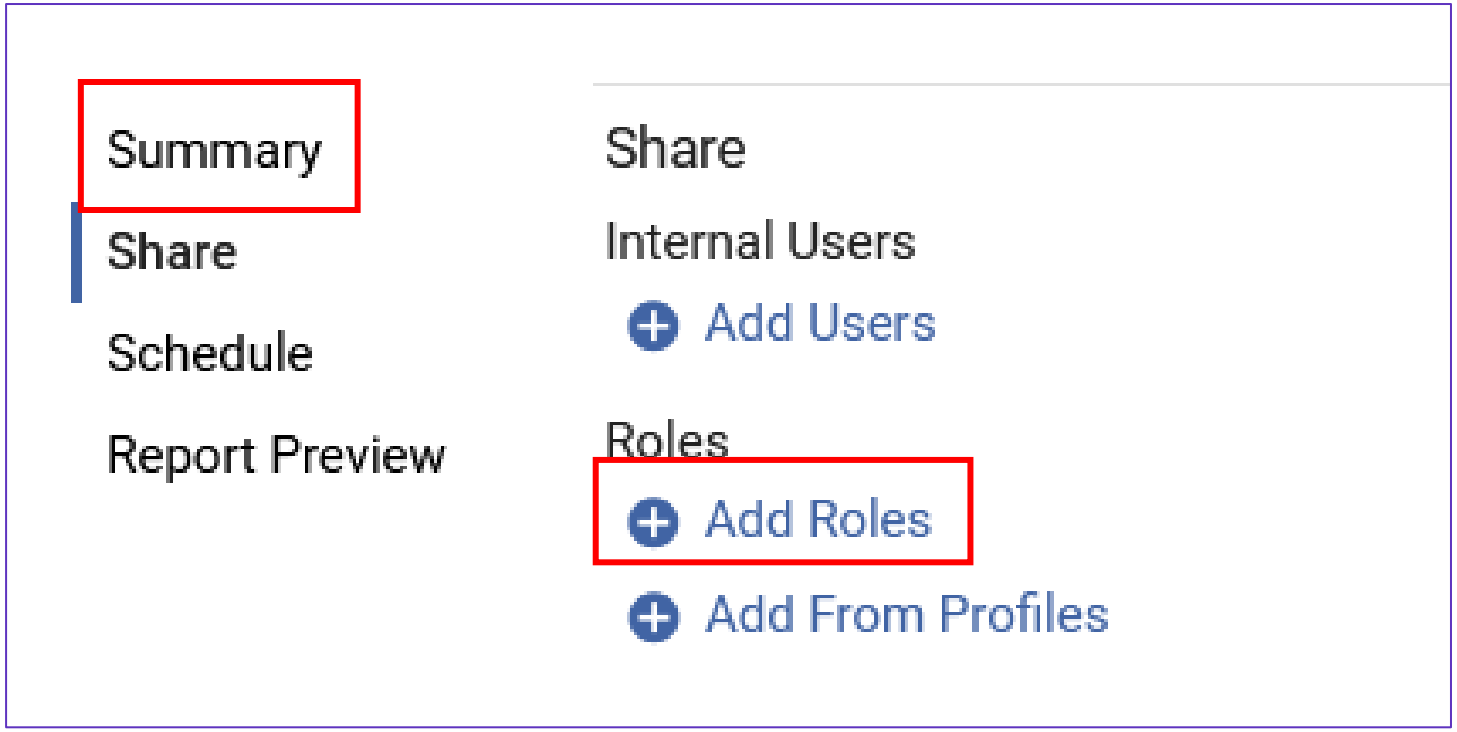
- In the “Report Preview” section check the box “Add as widget”



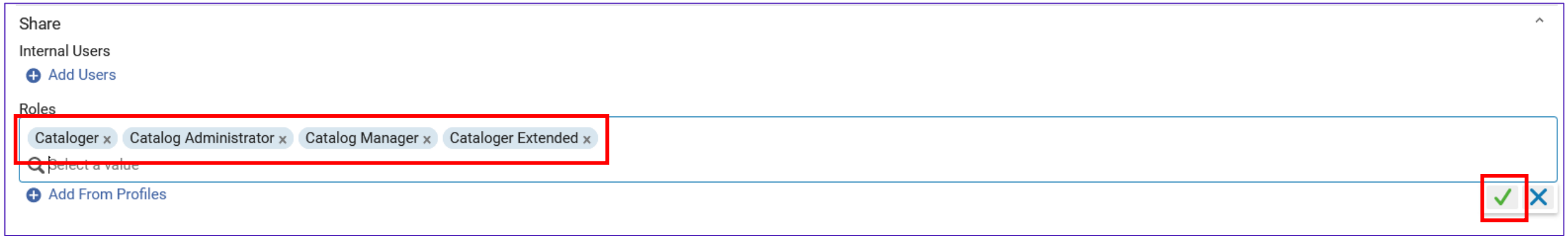
## Creating an analytics object

- Add the roles of the users who will be able to add this widget to their Alma homepage.
- In our case, because the report deals with cataloging, it would be relevant to add cataloging roles (and not for example fulfillment roles)
- In the “Share” section, “Roles” subsection, click “Add Roles”
- Add the desired roles

# Creating an analytics object



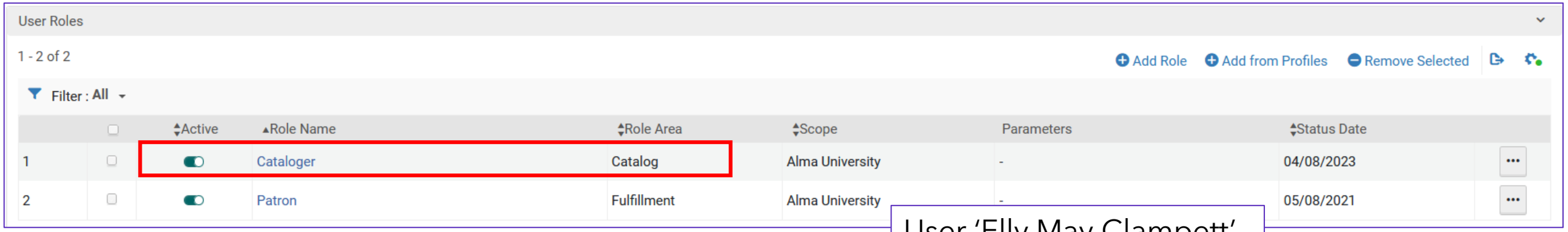
# Creating an analytics object



# Adding the widget to the Alma homepage

# Adding the widget to the Alma homepage

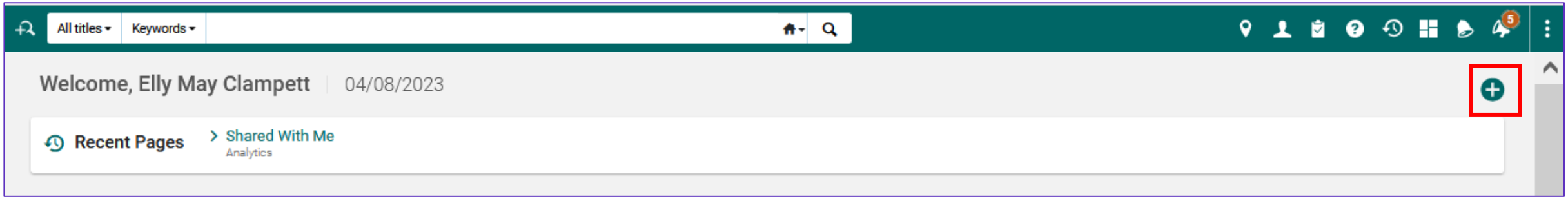
- Alma users with at least one of the relevant roles defined in the scheduled report can add the widget top the Alma Homepage.




User 'Elly May Clampett' has at least one of the relevant roles.

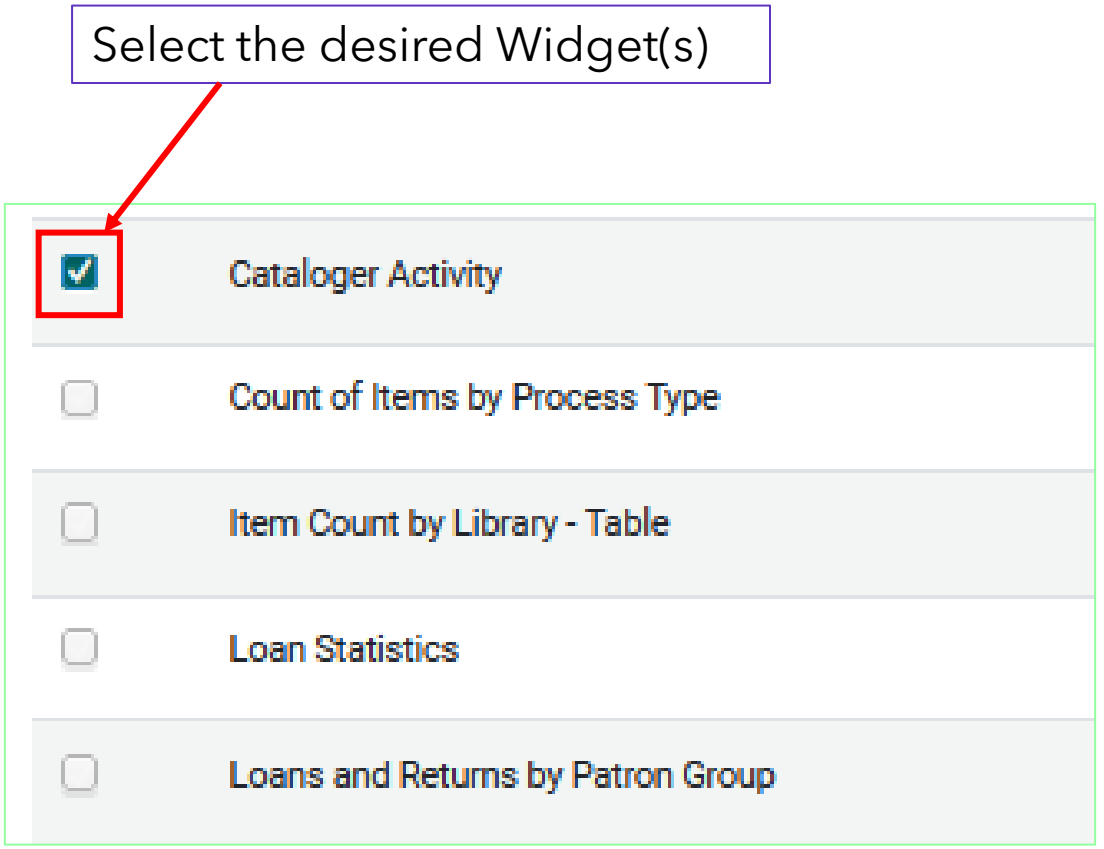
# Adding the widget to the Alma homepage

- User ‘Elly May Clampett’ logs in and clicks the + sign on the top right



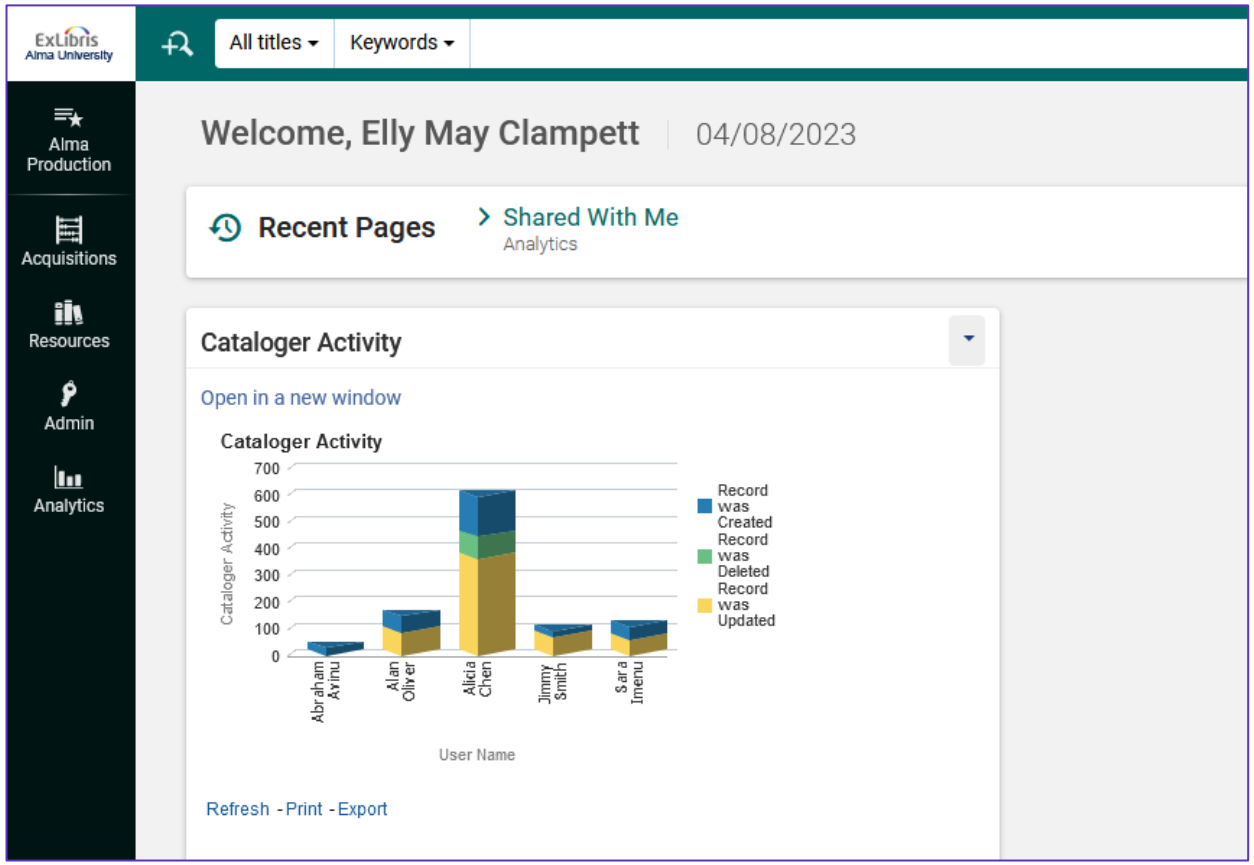
# Adding the widget to the Alma homepage

- The “Manage Widgets” screens opens and shows all widgets which have at least one role which the logged in user has.



# Adding the widget to the Alma homepage

- The widget is added to the Alma homepage



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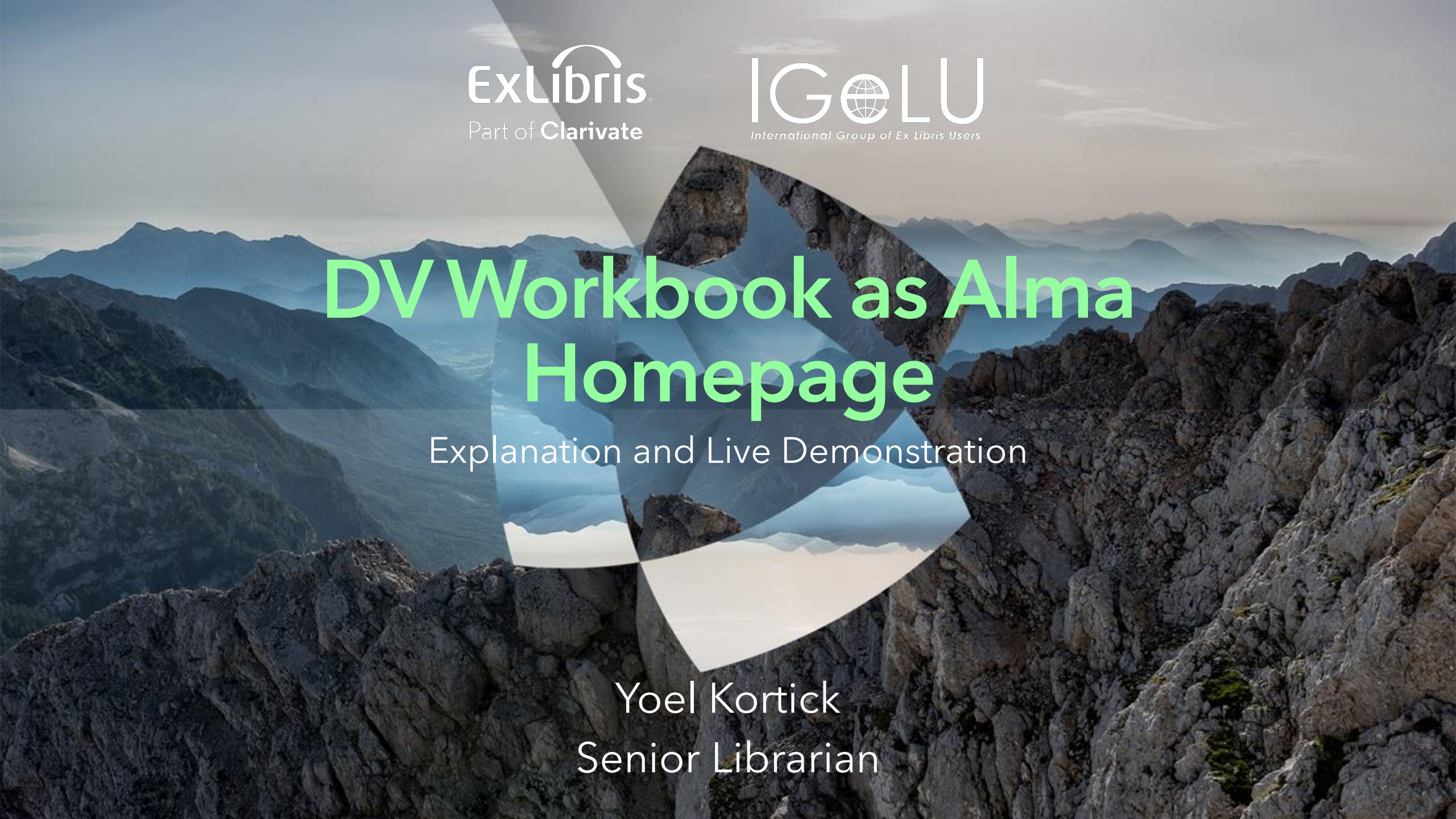
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DV Workbook as Alma Homepage
Explanation and Live Demonstration
Yoel Kortick
Senior Librarian

## Introduction

## The sample DV Workbook

## Configuring the DV Workbook to be the Alma homepage

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# Introduction

# Introduction

- It is possible to use a Data Visualization workbook as the Alma homepage
- This is useful if a staff user wants to display data relevant to his or her role in Alma by default.
- The homepage appears when first logging into Alma or when clicking the icon on the top left.

# The sample DV Workbook

# The sample DV Workbook

- On the next slide we will look at a DV Workbook relevant for a staff user who deals with fulfillment.
- The DV Workbook shows the number of loans for the current calendar year by patron user group.
- The DV Workbook is called “Loans by patron group for current calendar year” and is saved in folder “Shared Folders/Demo Alma University/Reports/Objects - DV and analytics/DV”

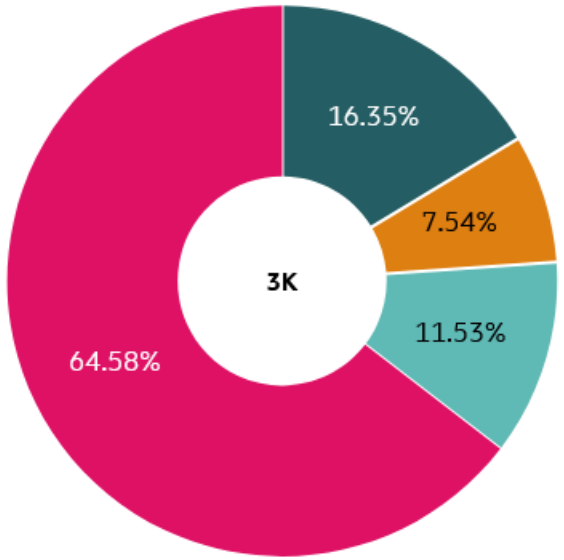
# The sample DV Workbook

## Loans by patron group for current calendar year

User Group, Loans (Not In House)

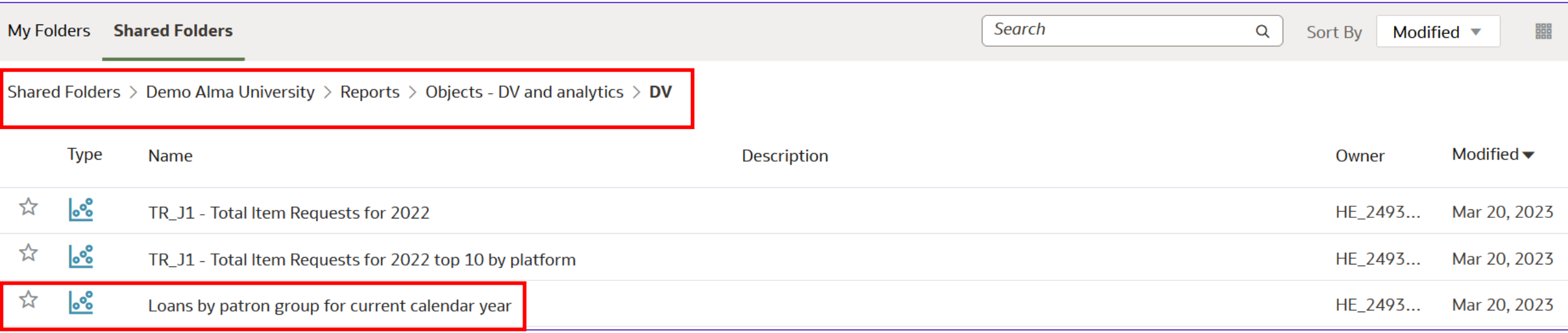
| User Group | Loans (Not In House) |
|---|---|
| Administrative Staff | 410.00 |
| Faculty | 189.00 |
| Graduate Student | 289.00 |
| Undergraduate Student | 1,619.00 |

Loans (Not In House) by User Group



# The sample DV Workbook

- Here is the DV Workbook saved in the relevant folder



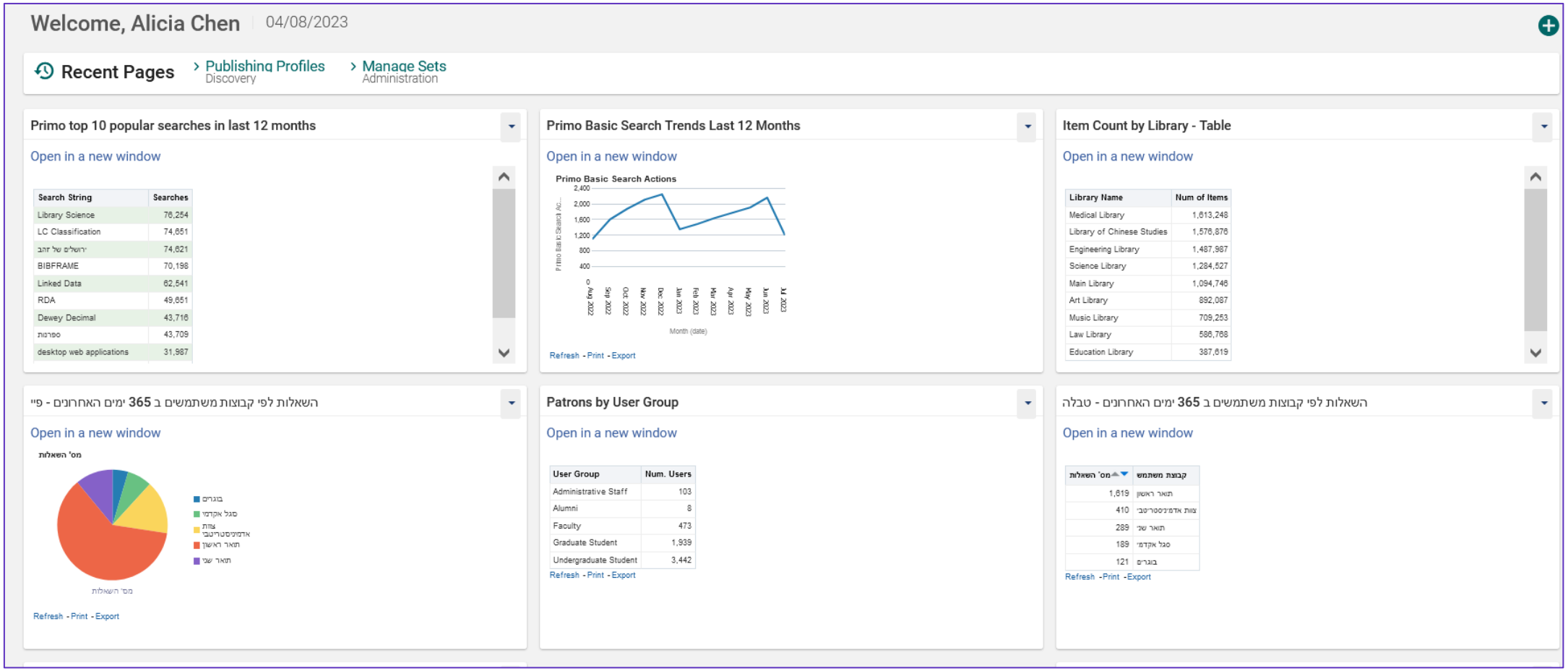
# Configuring the DV Workbook to be the Alma homepage

# Configuring the DV Workbook to be the Alma homepage

- As previously stated, it is possible to make the Alma homepage be a Data Visualization worksheet.
- The next slide shows the current Alma homepage, with selected analytics widgets.

# Configuring the DV Workbook to be the Alma homepage

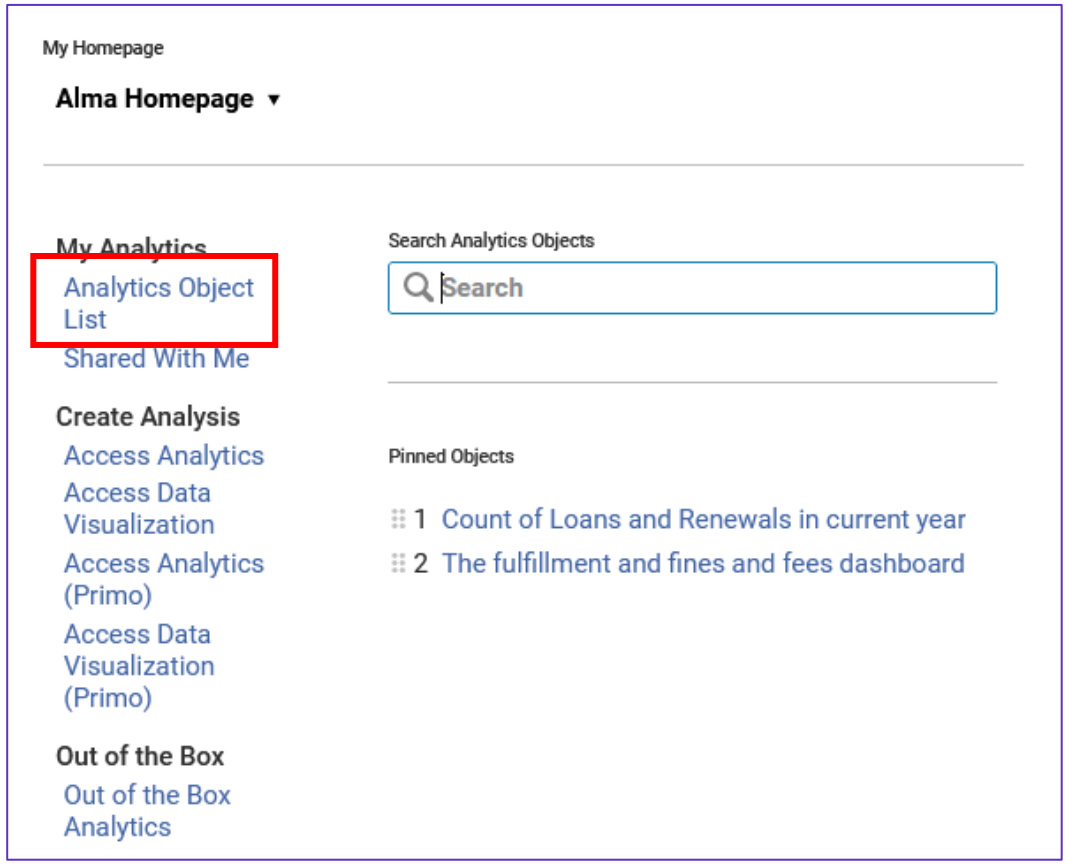
- The current Alma homepage

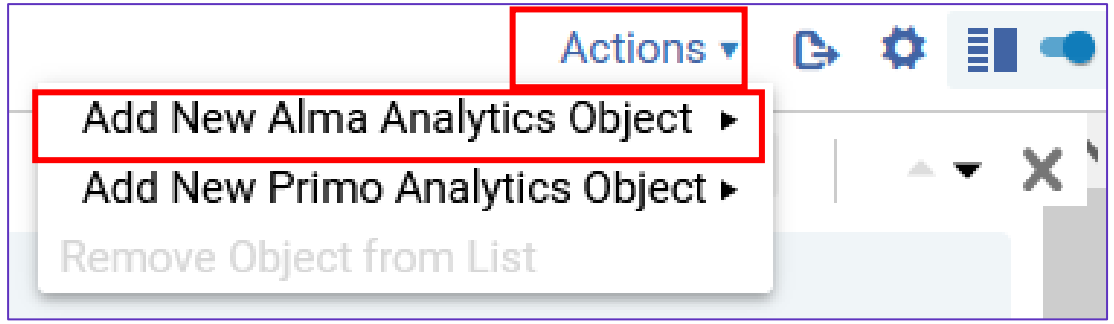


# Configuring the DV Workbook to be the Alma homepage

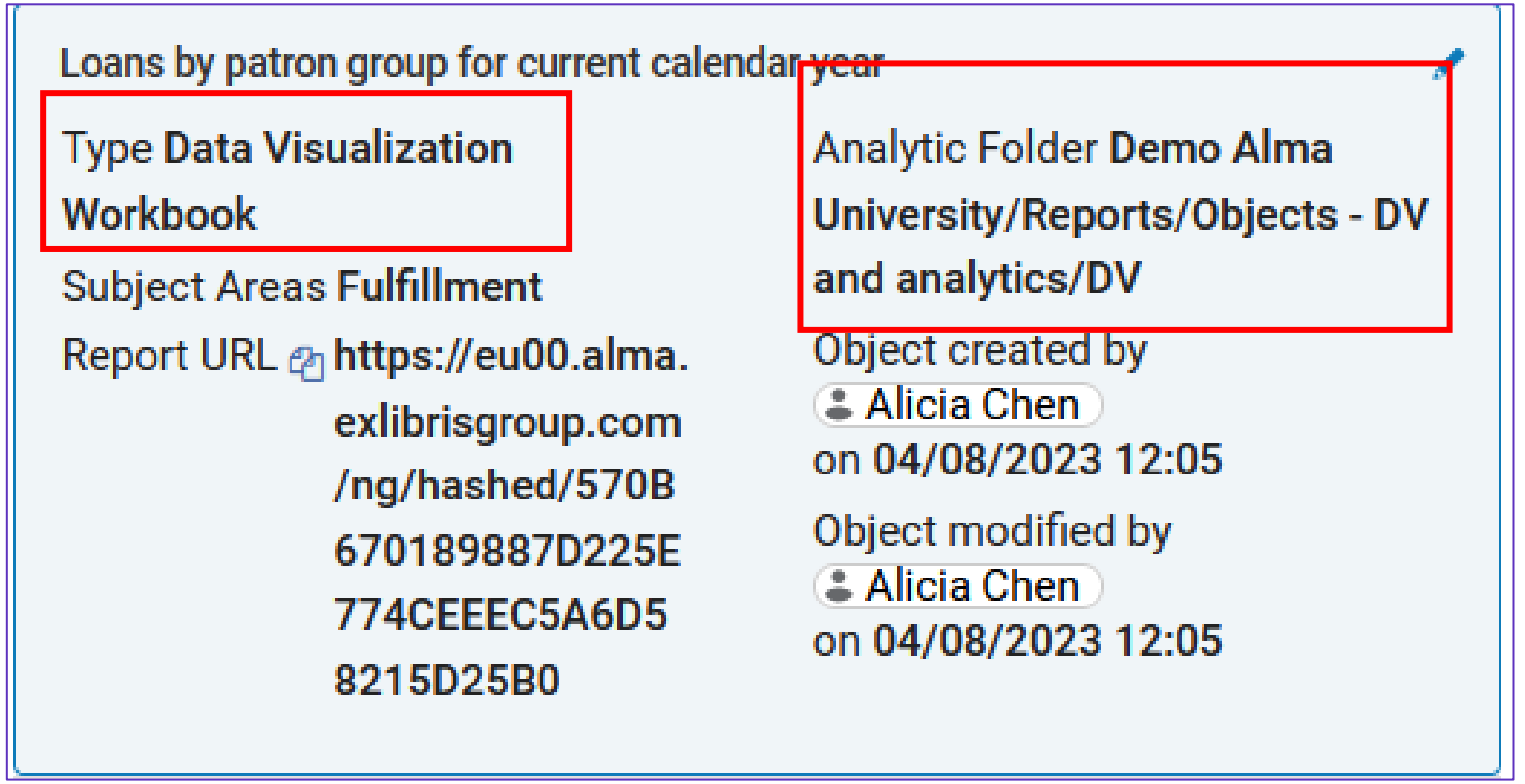
- Step 1: Add the DV workbook as an object
- First select “Analytics > My Analytics > Analytics Objects List”
- Then choose “Actions > Add New Alma Analytics Object”
- Choose the folder, DV Workbook, and optionally change the display name

# Configuring the DV Workbook to be the Alma homepage



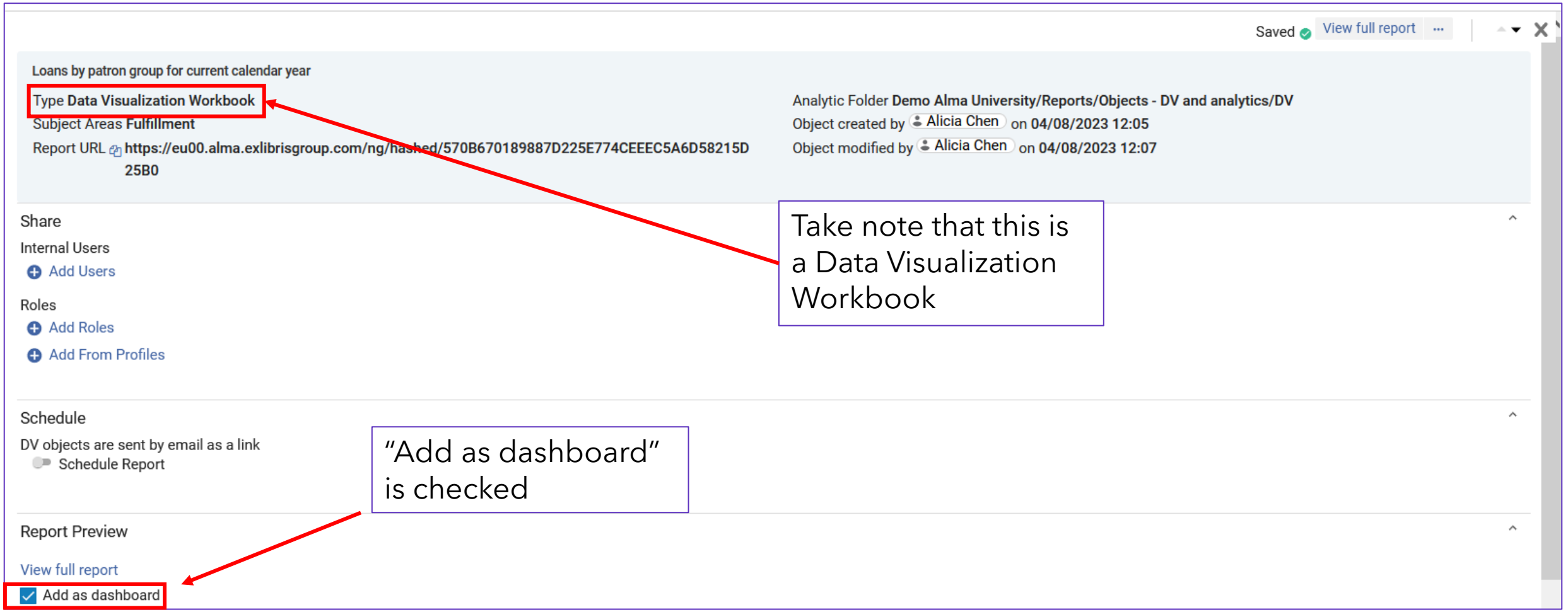
# Configuring the DV Workbook to be the Alma homepage



# Configuring the DV Workbook to be the Alma homepage

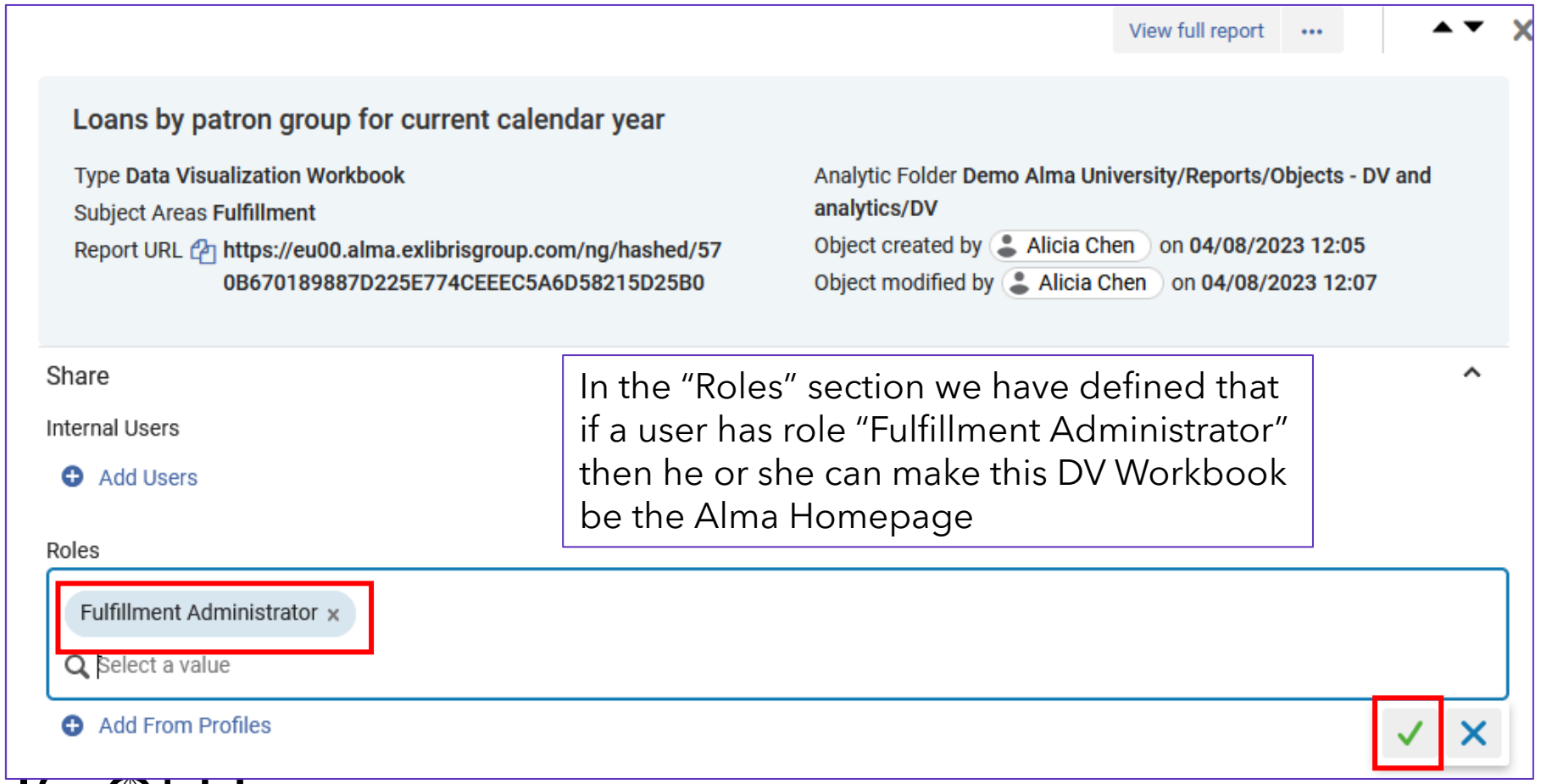
- Step 2: In the object check the box “Add as dashboard”
- You will also note that by default the object type will be “Data Visualization Project” because we chose a project from Data Visualization and not from Analytics.

# Configuring the DV Workbook to be the Alma homepage



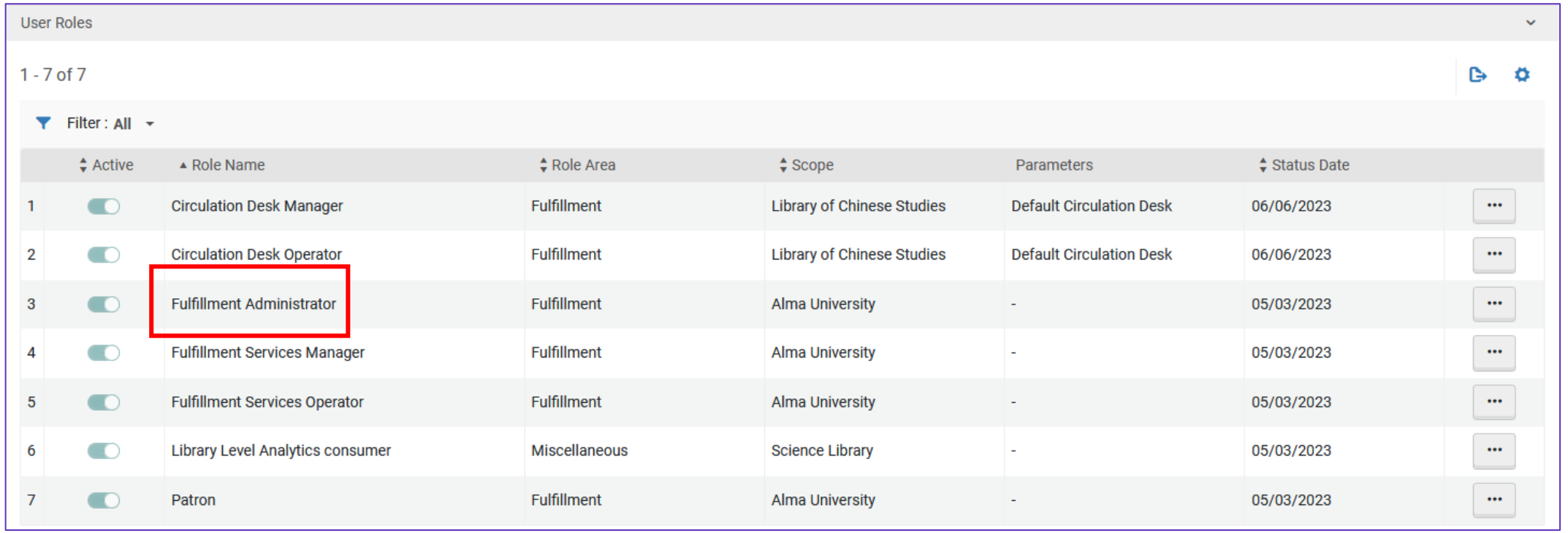
# Configuring the DV Workbook to be the Alma homepage

- Step 3: Assign the roles for which the user will be able to make the DV Workbook be the Alma homepage



# Configuring the DV Workbook to be the Alma homepage

- User Susan Aarons has role “Fulfillment Administrator” and this she can make this DV Workbook be the Alma Homepage



User Roles

1 - 7 of 7

Filter : All

| | Active | Role Name | Role Area | Scope | Parameters | Status Date |
|---|---|---|---|---|---|---|
| 1 | | Circulation Desk Manager | Fulfillment | Library of Chinese Studies | Default Circulation Desk | 06/06/2023 |
| 2 | | Circulation Desk Operator | Fulfillment | Library of Chinese Studies | Default Circulation Desk | 06/06/2023 |
| 3 | | Fulfillment Administrator | Fulfillment | Alma University | - | 05/03/2023 |
| 4 | | Fulfillment Services Manager | Fulfillment | Alma University | - | 05/03/2023 |
| 5 | | Fulfillment Services Operator | Fulfillment | Alma University | - | 05/03/2023 |
| 6 | | Library Level Analytics consumer | Miscellaneous | Science Library | - | 05/03/2023 |
| 7 | | Patron | Fulfillment | Alma University | - | 05/03/2023 |

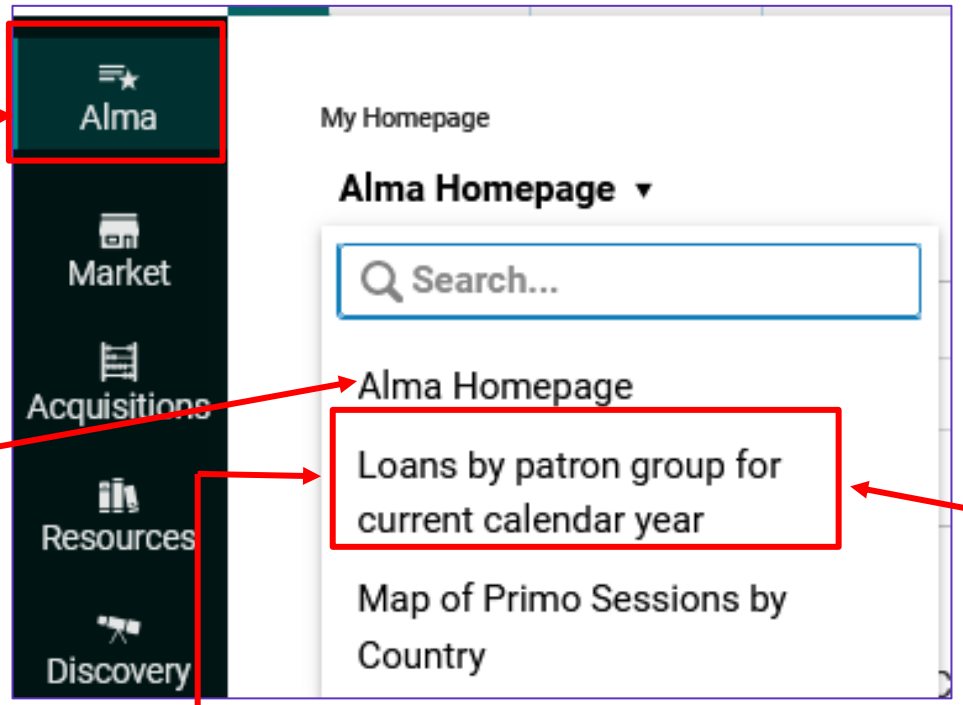
# Configuring the DV Workbook to be the Alma homepage

- Step 4: Click the “Alma” link in the menu on the top left and then select the down arrow next to “Alma Homepage”.
- You will see the Data Visualization objects which have been created and have checked “Add as dashboard”
- Choose the desired Data Visualization object

# Configuring the DV Workbook to be the Alma homepage

- Step 4:

Click here

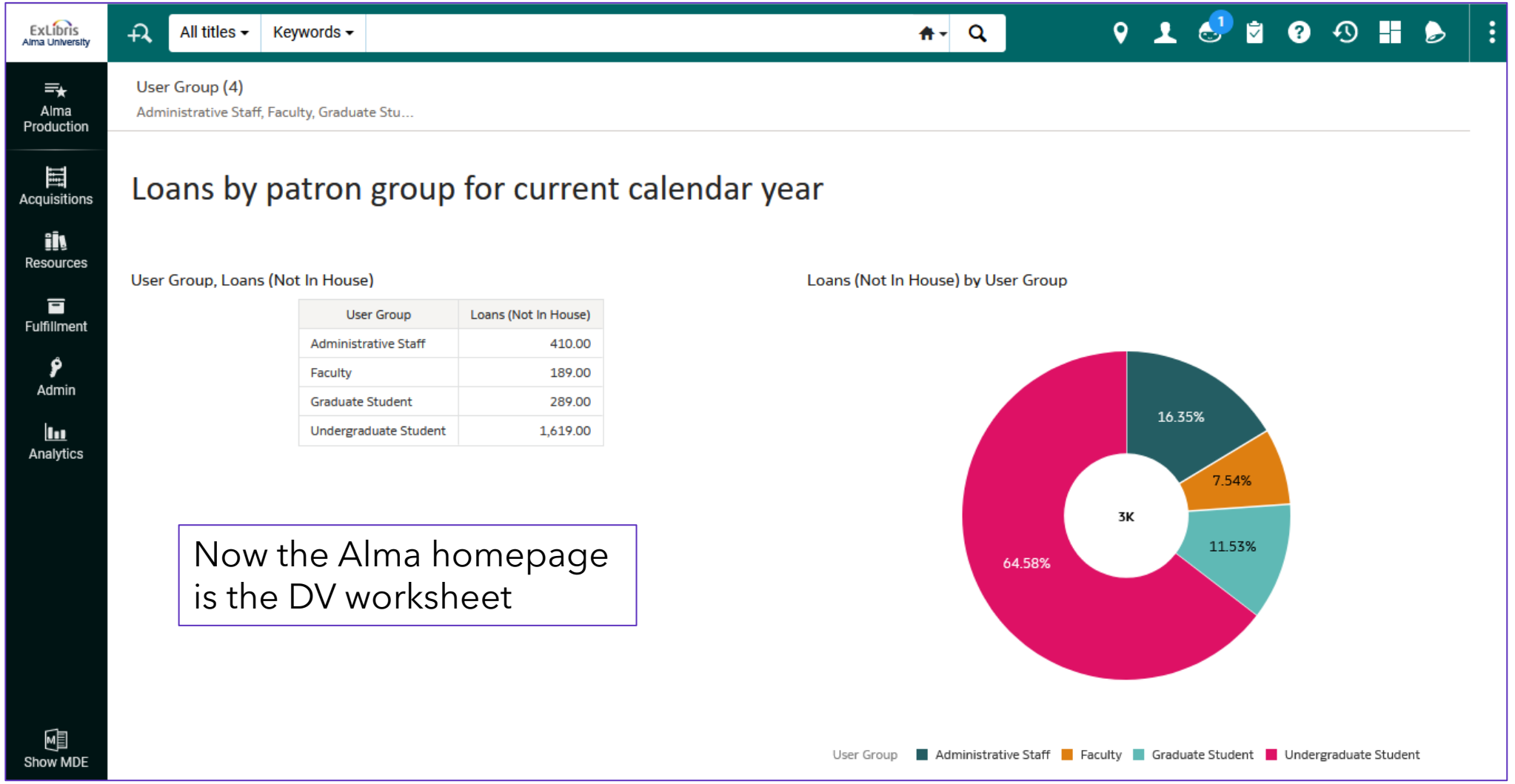



Leave "Alma Homepage" selected to remain with currently functionality (whereby Analytics widgets can be added to the Alma homepage).

We will select this

Select desired DV object. This is the one we looked at a moment ago.

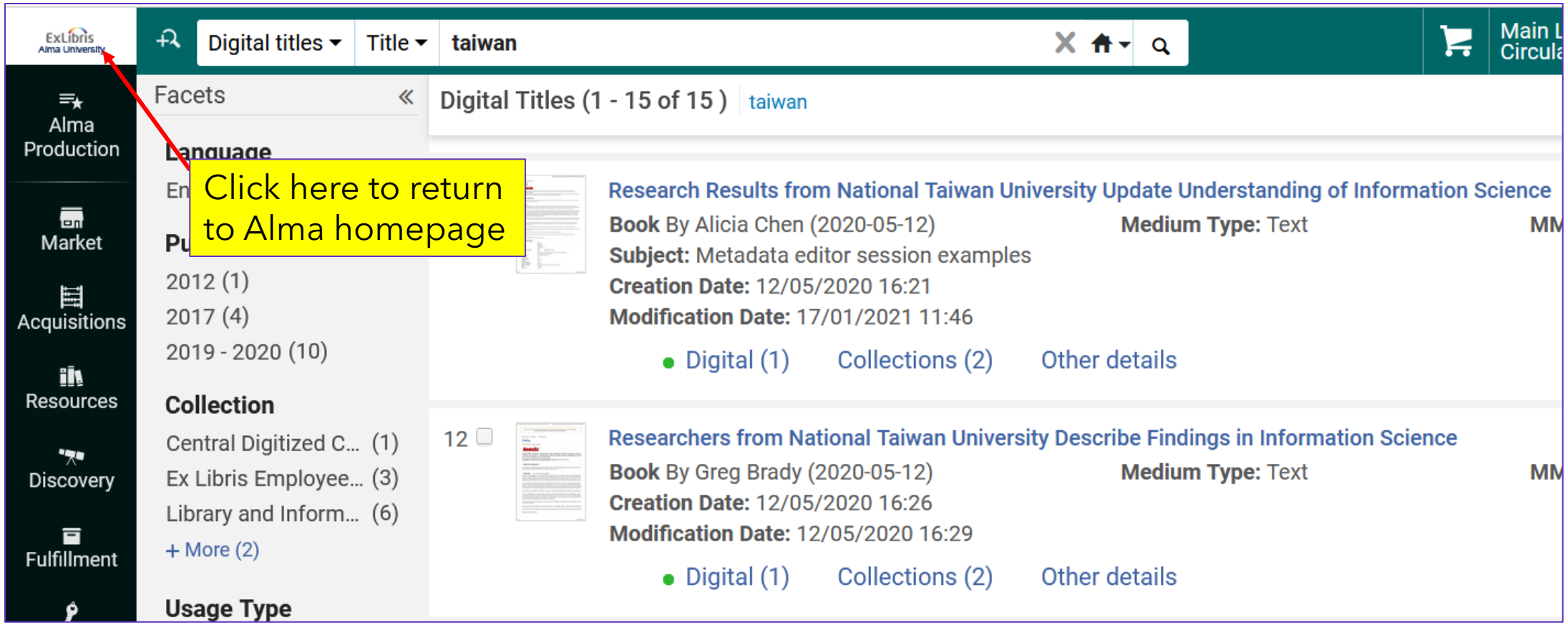
# Configuring the DV Workbook to be the Alma homepage




Now the Alma homepage is the DV worksheet

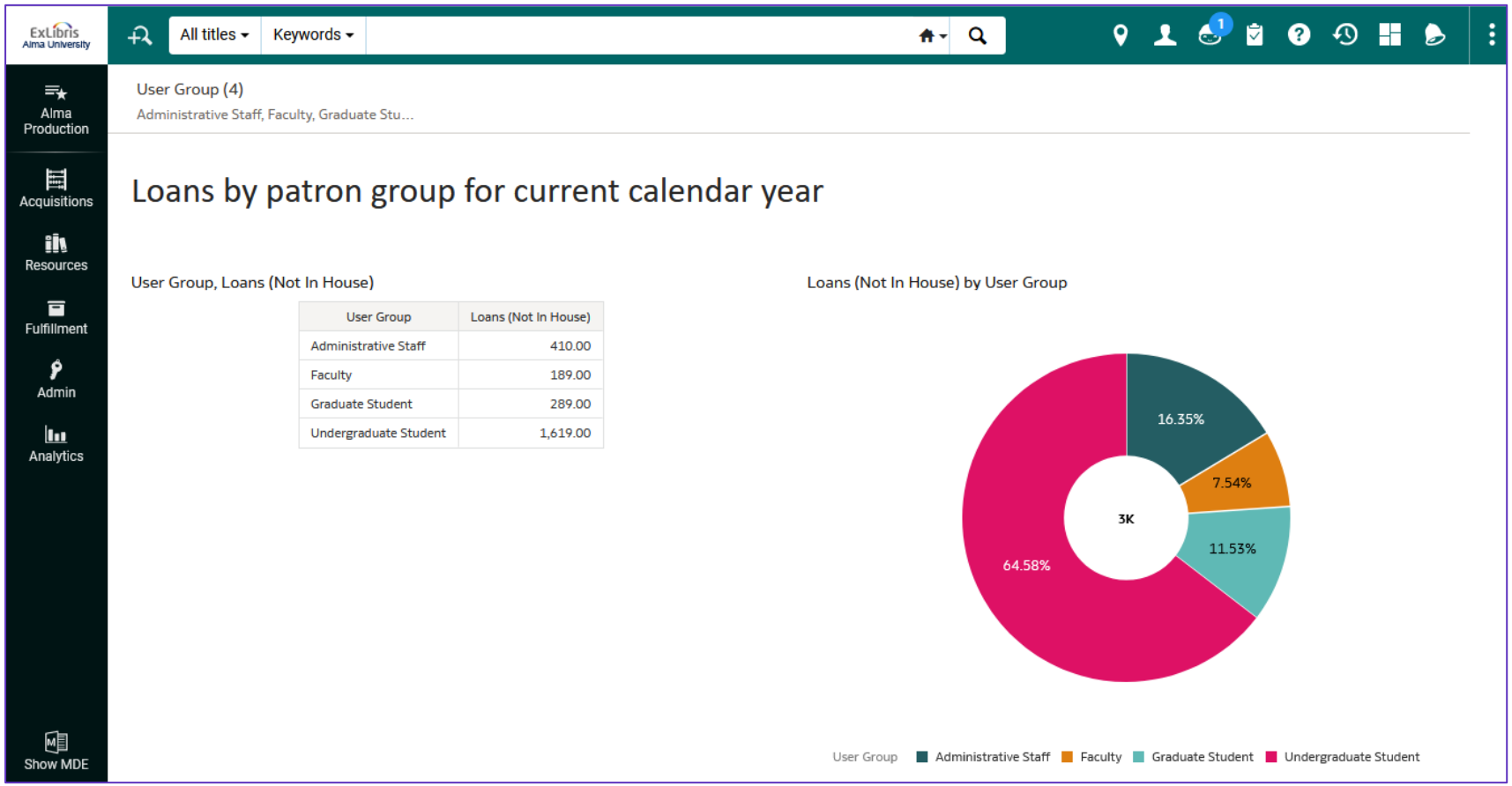
# Configuring the DV Workbook to be the Alma homepage

- At any time, we can click the icon on the top left and return to the Alma homepage



# Configuring the DV Workbook to be the Alma homepage

- After clicking the icon, the DW workbook appears on the homepage



**Yoel Kortick**
Yoel.Kortick@clarivate.com

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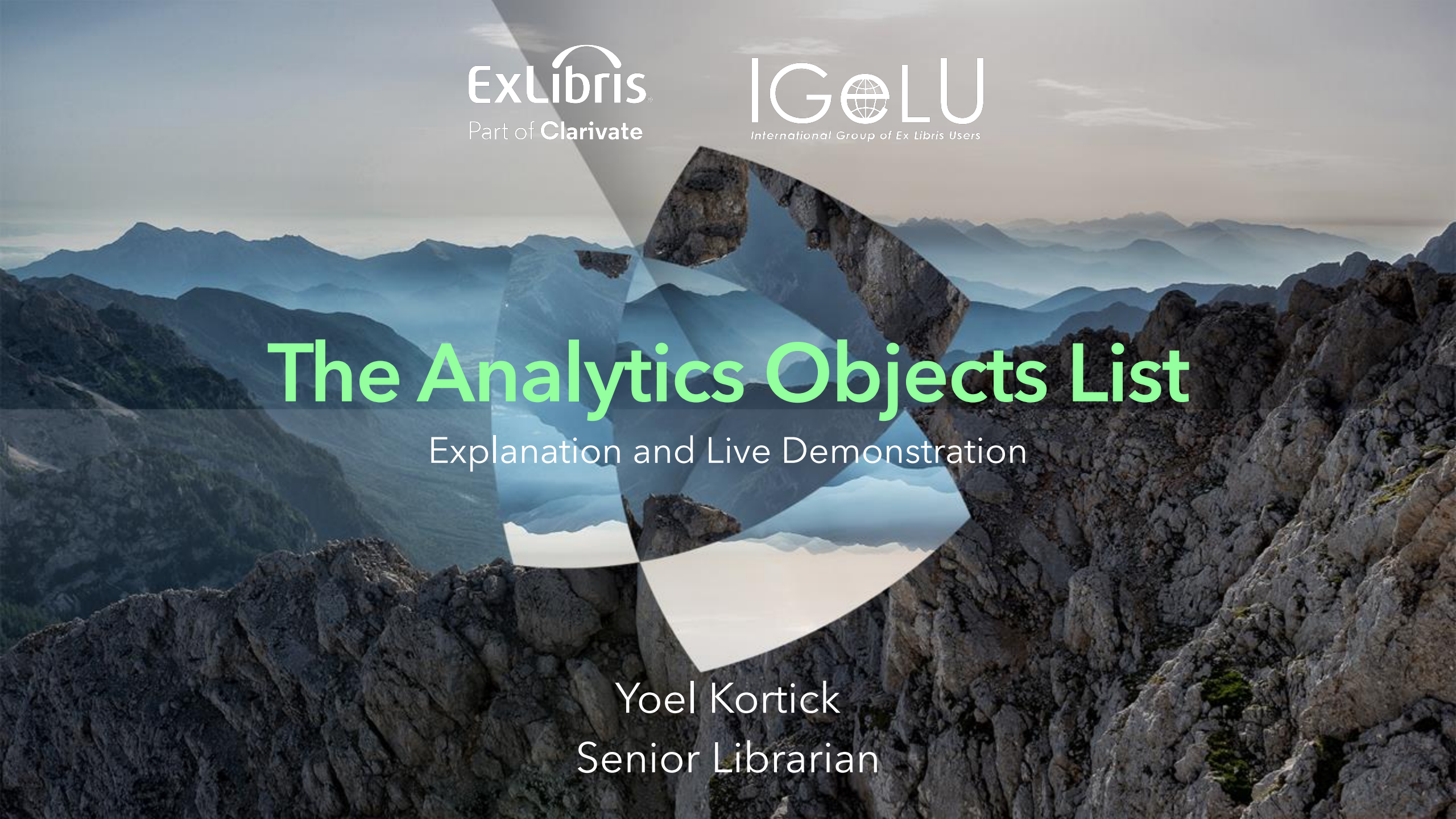

Ex Libris
Part of Clarivate
IGeLU
International Group of Ex Libris Users
The Analytics Objects List
Explanation and Live Demonstration
Yoel Kortick
Senior Librarian

Introduction

The Menu

Multi-Select Facets

Sorting the list of Analytics Objects

Searching the list of Analytics Objects

Presentation Toggle Button

Split View (Side By Side View)

Viewing the report from within the object

ExLibris Part of Clarivate

IGeLU International Group of Ex Libris Users

# Introduction

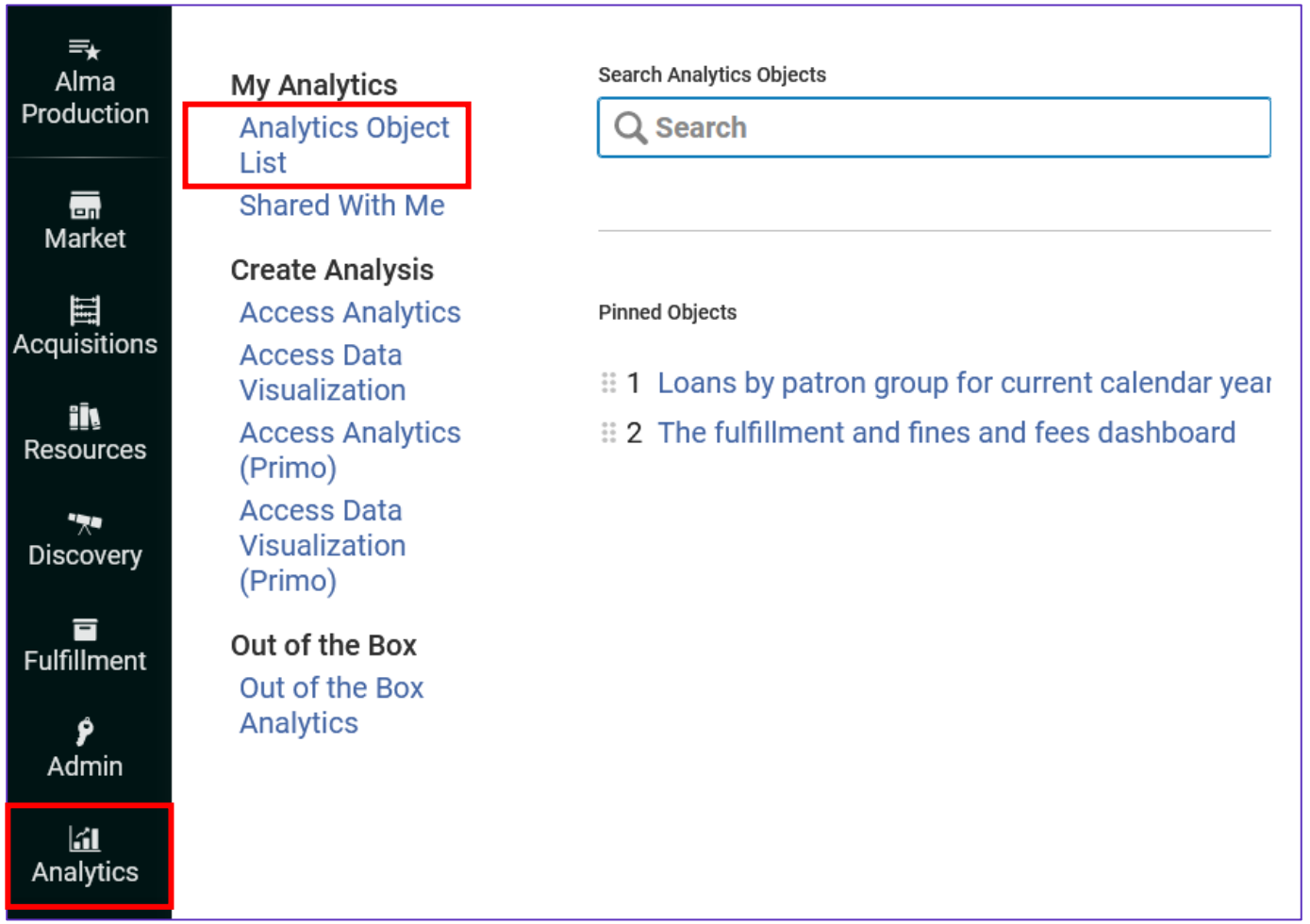
# Introduction

- The analytics object allows the staff user to provide access to analytics reports for the “analytics consumer”.
  - The “analytics consumer” is the staff user who “uses” analytics reports but does not create, edit or delete analytics reports.
  - The “analytics designer” is the staff user who does create, edit or delete analytics reports.  He or she will have the role “Designs” analytics.

# The Menu

# The Menu

- Select “Analytics > My Analytics > Analytics Objects List”

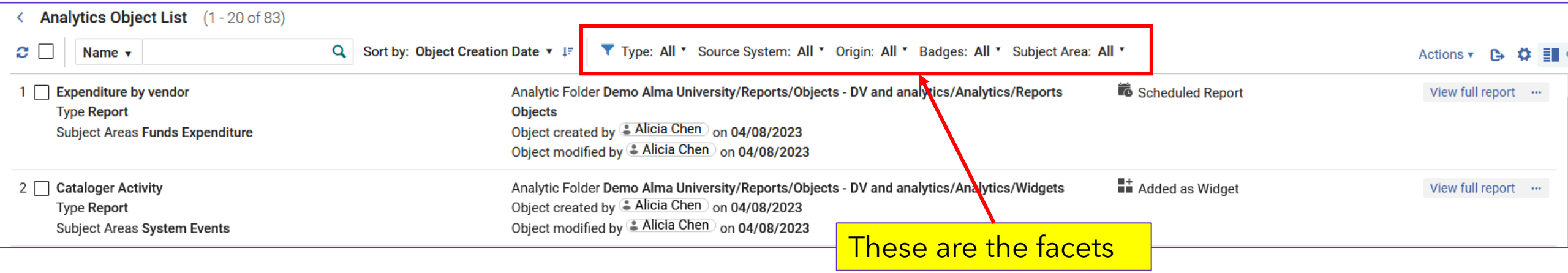


# Multi-Select Facets

# Multi-Select Facets

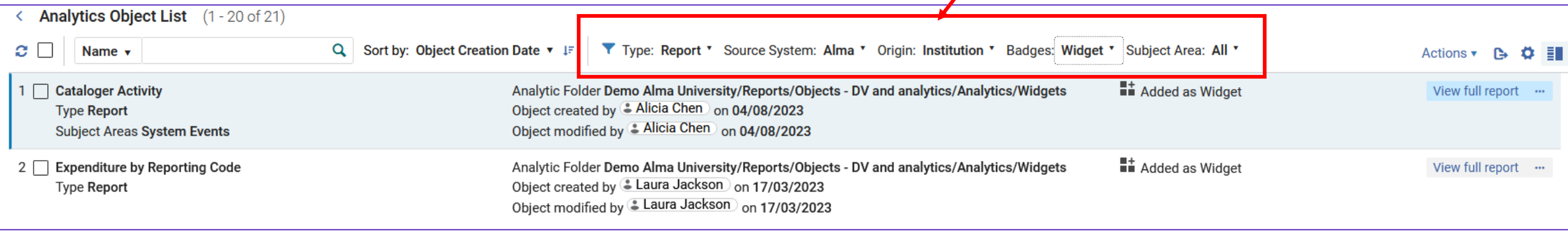
- The Analytics Objects of all types are presented in a single page.
- The staff user can facet Analytics Objects by
  - Type
  - Source System
  - Origin
  - Badges
  - Subject Area
- Multiple facets can be chosen simultaneously and then applied, allowing the staff user to arrive to a very specific group of Analytics Objects

# Multi-Select Facets



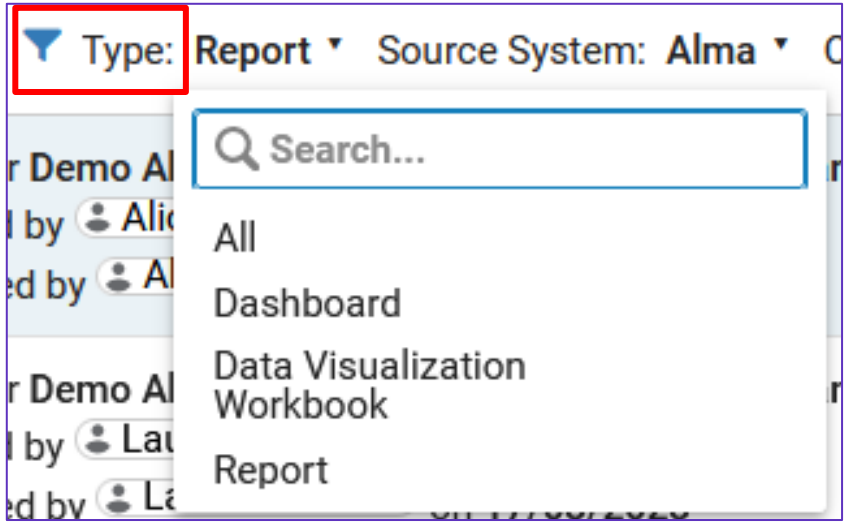
# Multi-Select Facets

- Here we have chosen multiple facets to get all Analytics Objects:
  - Of type report
  - From Alma (not Primo)
  - Created by the institution (not default Ex Libris reports)
  - Badges = Widget
  - All subject areas



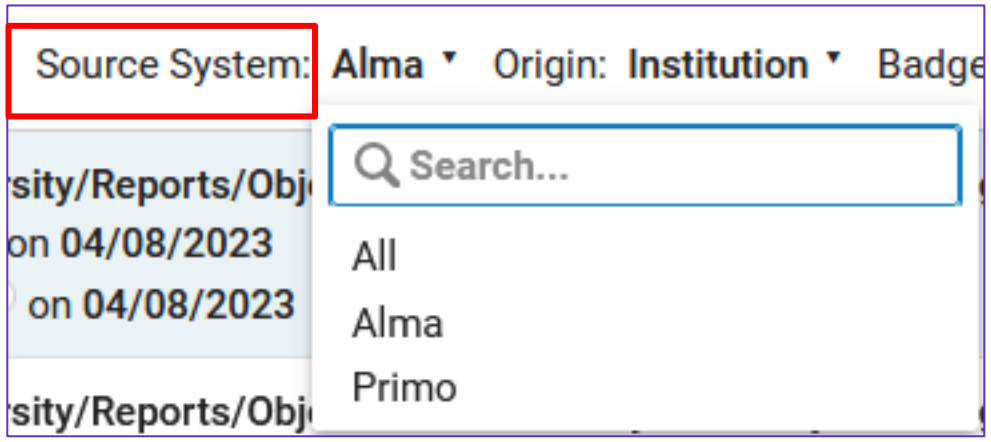
# Multi-Select Facets

- The facet “Type” can be
  - All
  - Dashboard
  - Data Visualization Project
  - Report



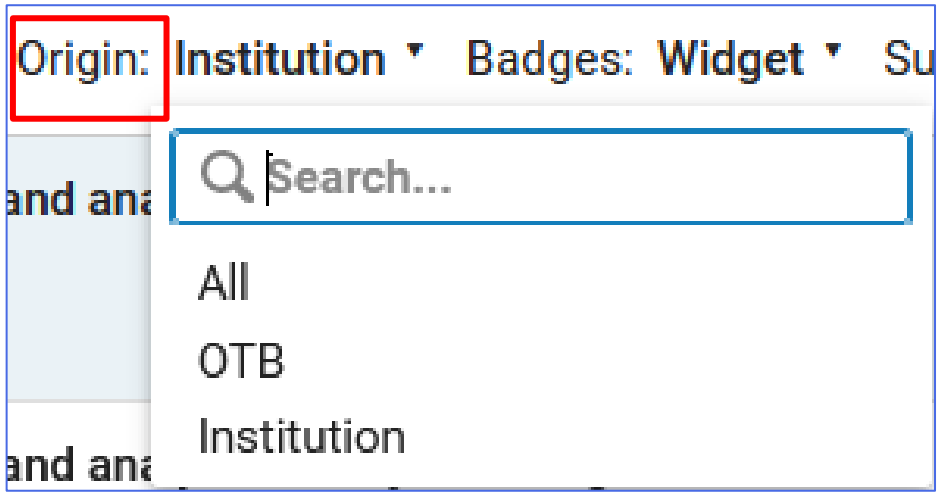
# Multi-Select Facets

- The facet “Source System” can be
  - All
  - Alma
  - Primo



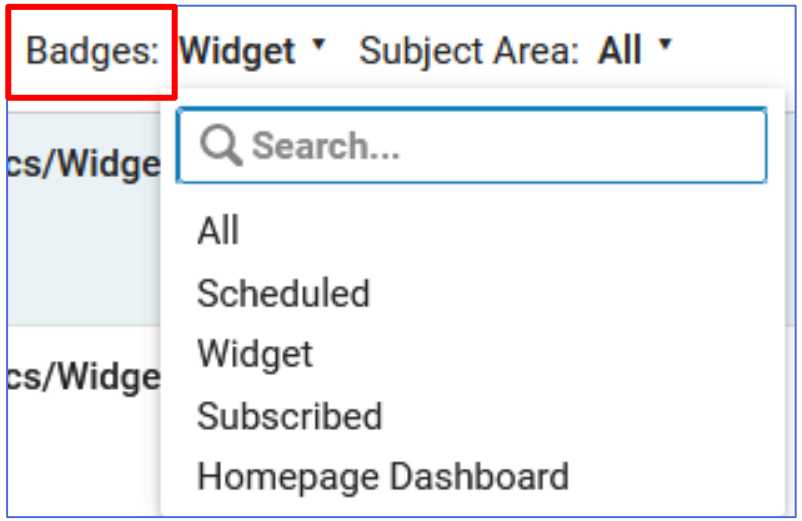
# Multi-Select Facets

- The facet “Origin” can be
  - All
  - OTB (Out of the Box default reports supplied by Ex Libris which are part of Alma)
  - Institution (Created by the institution)



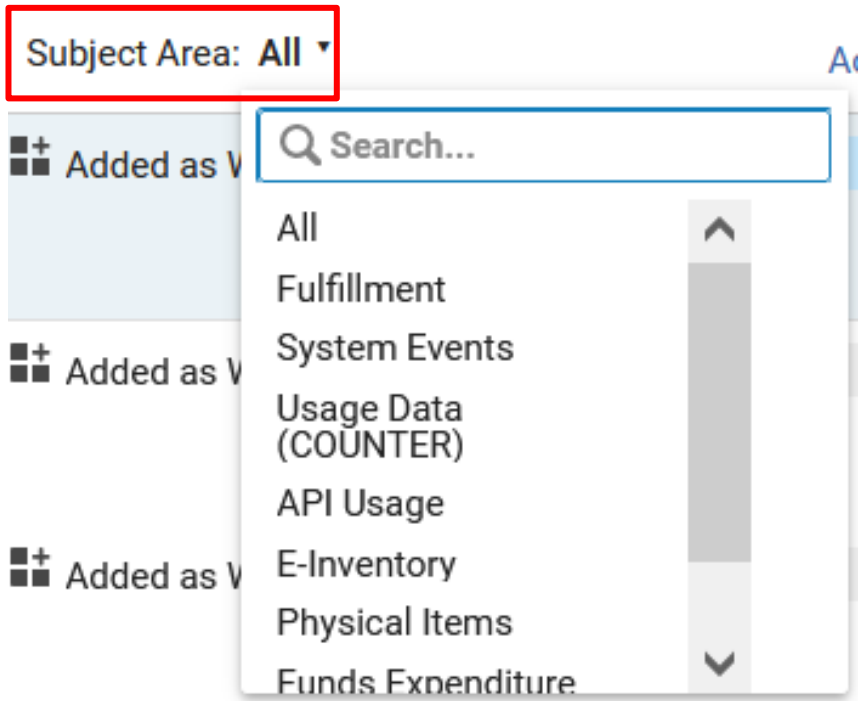
# Multi-Select Facets

- The badges can be
  - All
  - Scheduled
  - Widget
  - Subscribed
  - Homepage Dashboard



# Multi-Select Facets

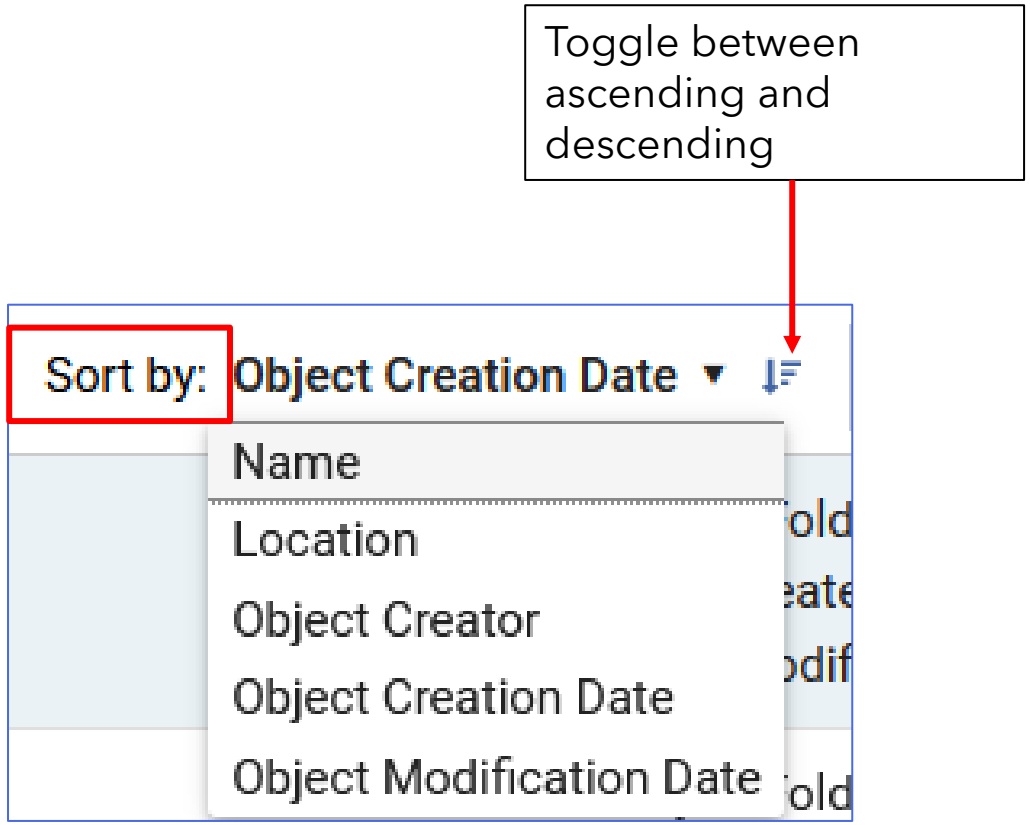
- The facet “Subject Area” can be
  - All
  - Any one of the subject areas



# Sorting the list of Analytics Objects

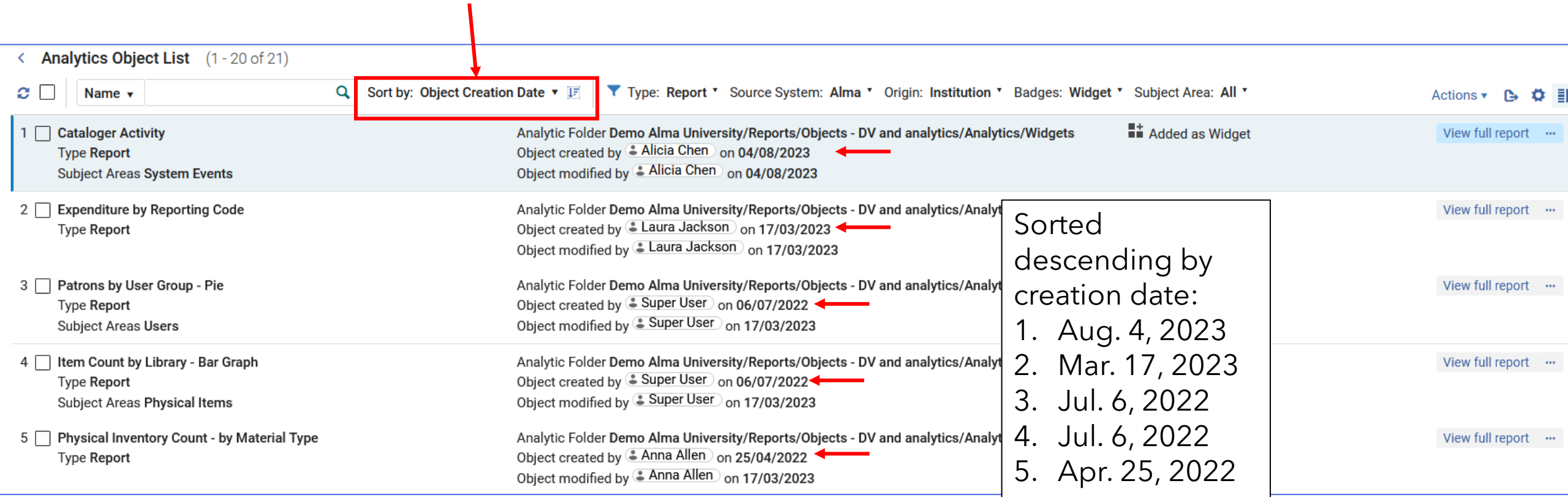
# Sorting the list of Analytics Objects

- The list of Analytics Objects can be sorted ascending or descending by:
  - Name
  - Location
  - Object Creator
  - Object Creation Date
  - Object Modification Date



# Sorting the list of Analytics Objects

- Here the list of Analytics Objects is sorted descending by creation date



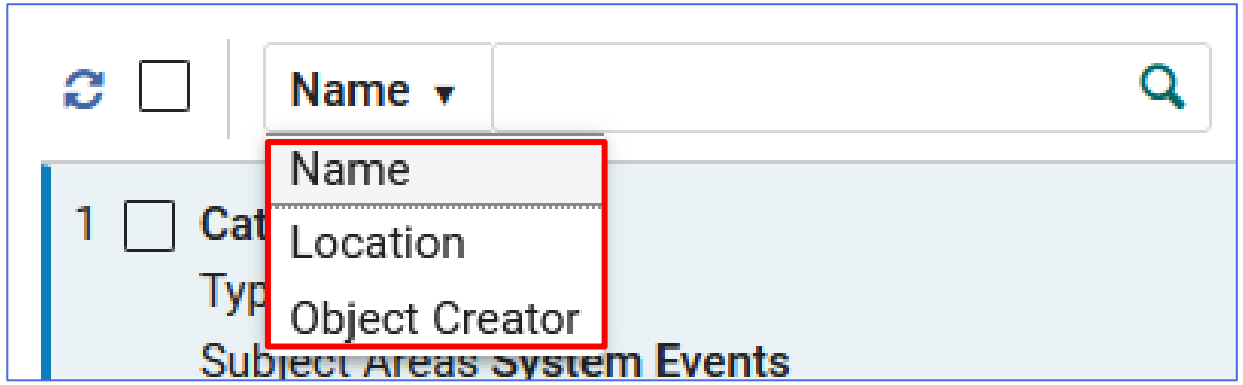

Sorted descending by creation date:

1. Aug. 4, 2023
2. Mar. 17, 2023
3. Jul. 6, 2022
4. Jul. 6, 2022
5. Apr. 25, 2022

# Searching the list of Analytics Objects

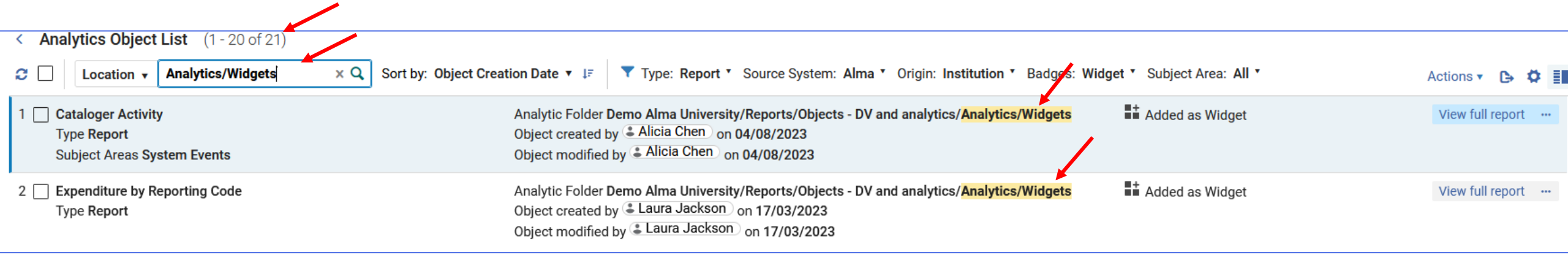
# Searching the list of Analytics Objects

- The Analytics Object List can be searched by
  - Name
  - Location
  - Object Creator



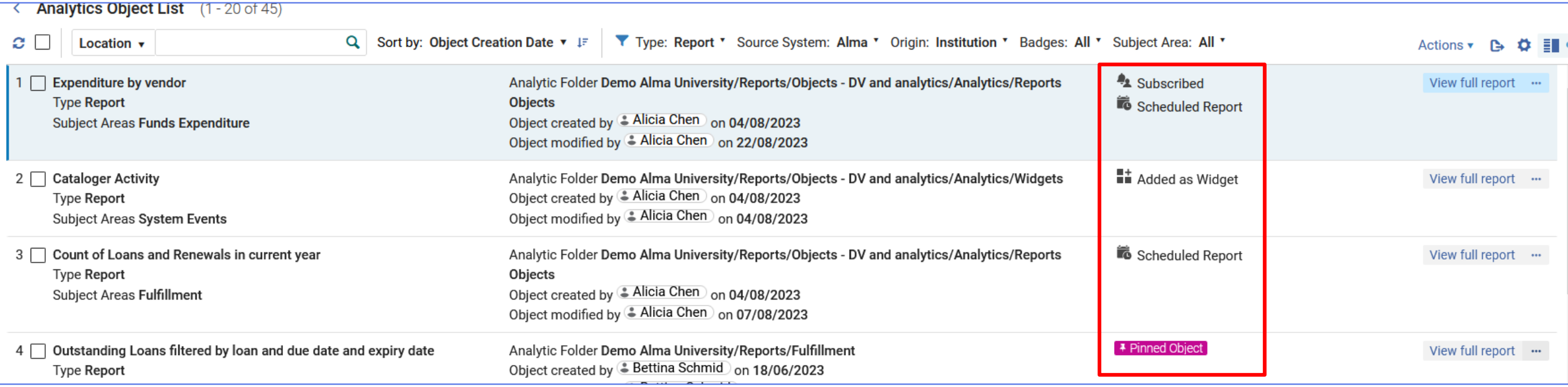
# Searching the list of Analytics Objects

- The 'Location' is the directory where the analytics report of the analytics object is located.
- Here for example, we have searched for Location with the word "Analytics/Widgets" in it and received 21 results.



# Searching the list of Analytics Objects

- The "Badges" give a clear indication of what has been done with the specific widget for the logged in user



# Presentation Toggle Button

# Presentation Toggle Button

- The presentation toggle button is located on the top right corner of the page and enables users to determine the way the Analytics Object(s) is / are presented on the screen.
- This allows users to work in the best way that suits their specific individual needs.

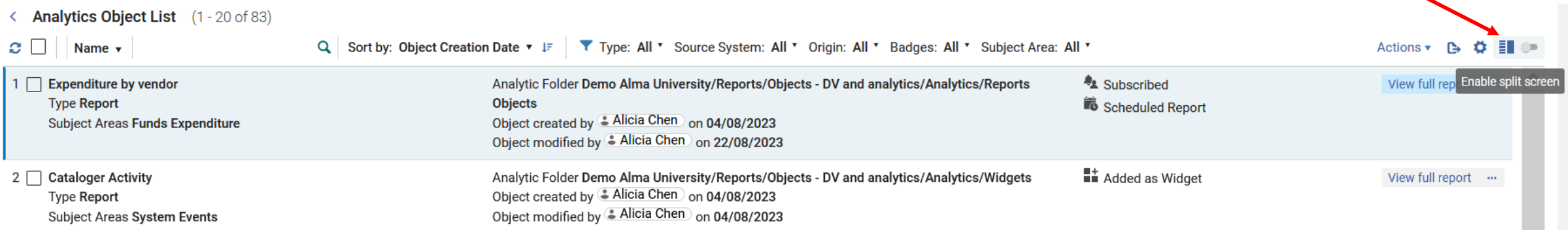
# Presentation Toggle Button

- There are two presentation options:
  - **List view** - presents the full list of Analytics Objects in a single panel
  - **Split view** - presents the full list of Analytics Objects on one side and more information about the selected Analytics Objects on the other side. Split view presentation can also be triggered by simply clicking on one of the Analytics Objects presented in the full list. Users can determine the width of the left / right panel by selecting one of the 3 pre-set options or by clicking and dragging the vertical separator ruler to the right or to the left (vertical ruler separates between the left and right panels).
- Additionally, a user can view an object in Full Page View:
  - **Full Page view** - the presentation in this selection presents a specific Analytics Object in full view.

# Presentation Toggle Button

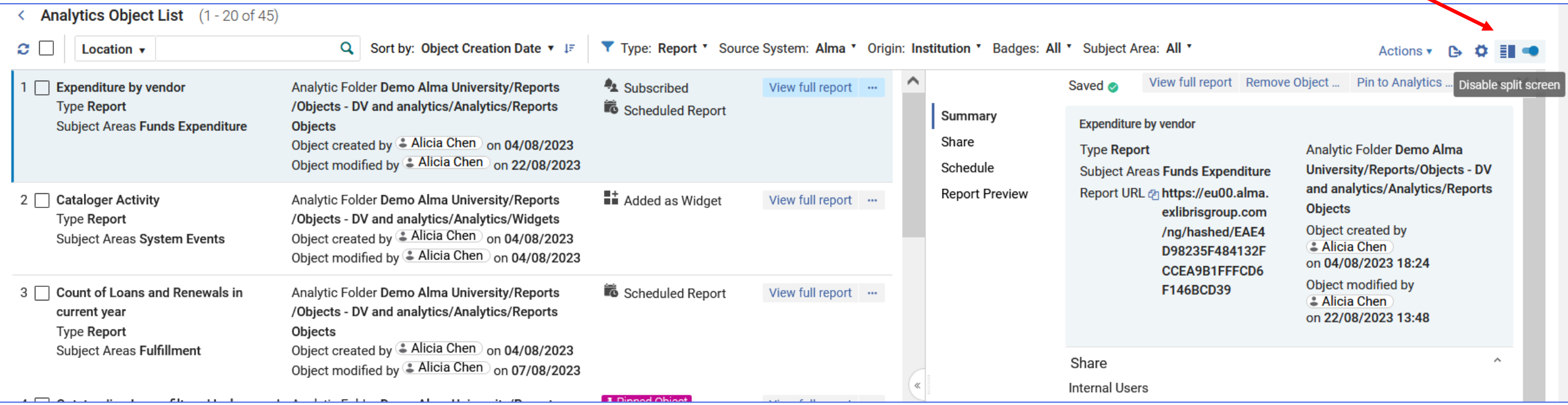
- This is the list view

We will now click here to enable "Split Screen"



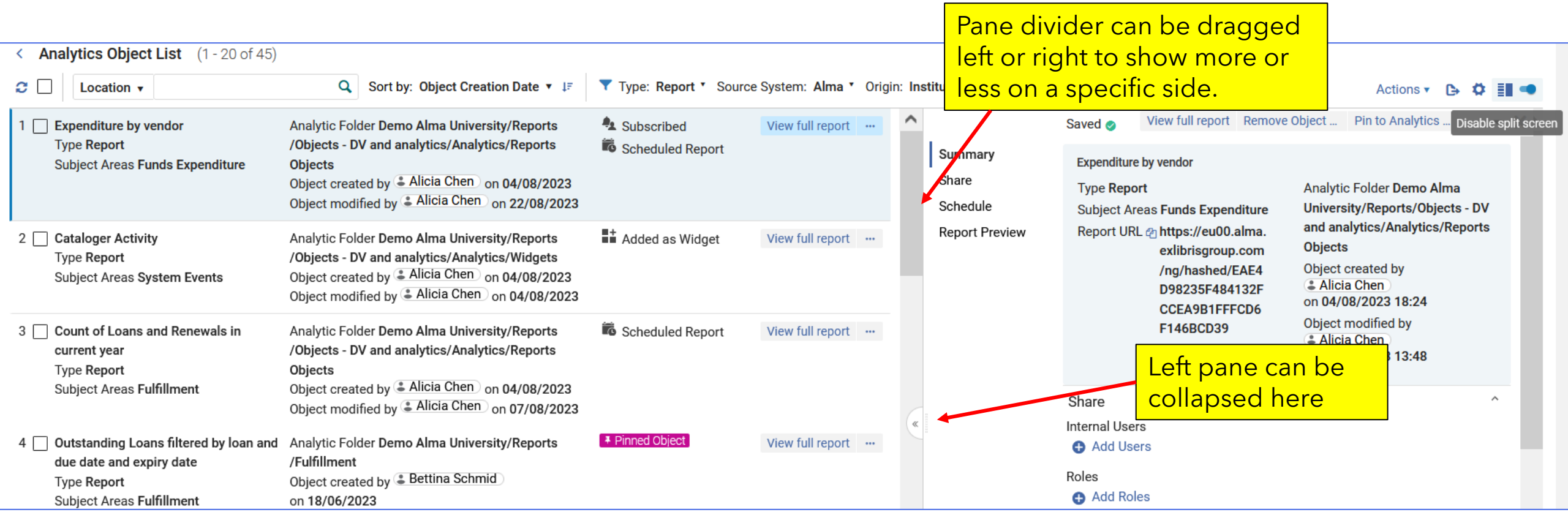
# Presentation Toggle Button

Now we are in “Split Screen” and can click here to “Disable Split Screen”



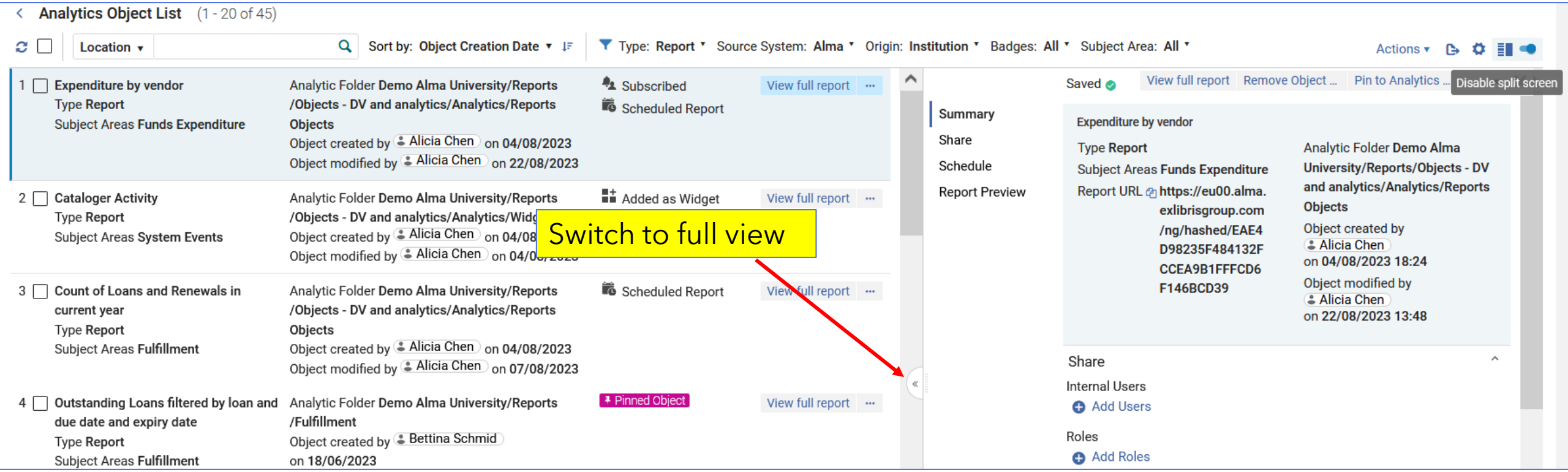
# Presentation Toggle Button

- This is the split view

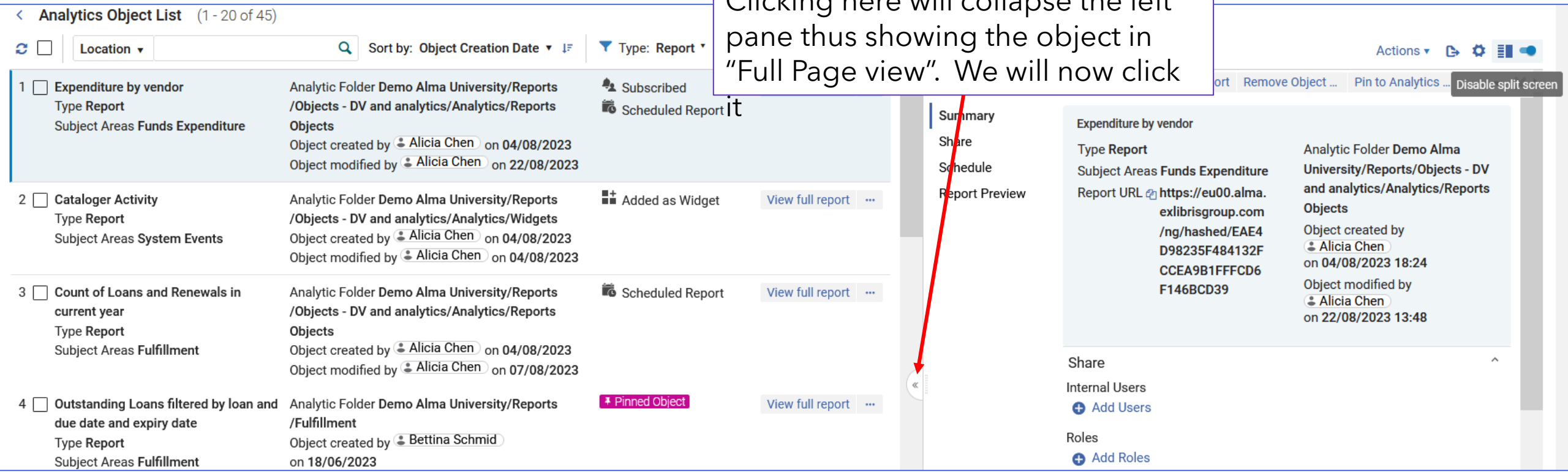


# Presentation Toggle Button

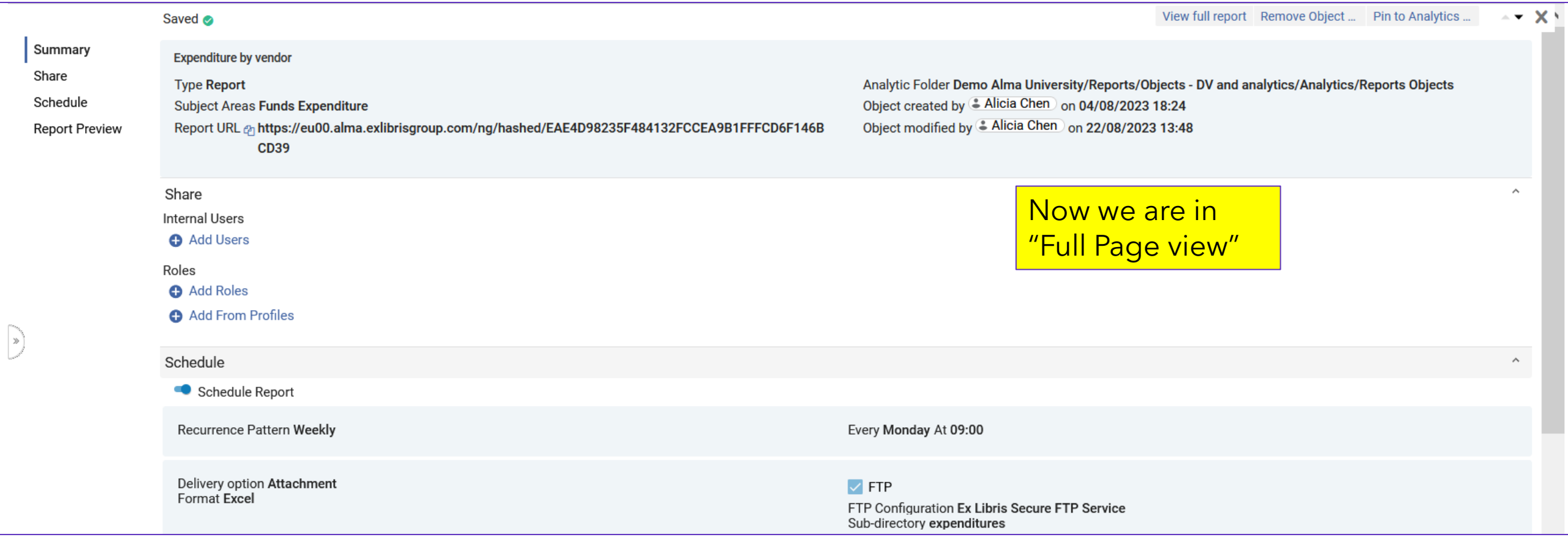
- This is the split view



# Presentation Toggle Button

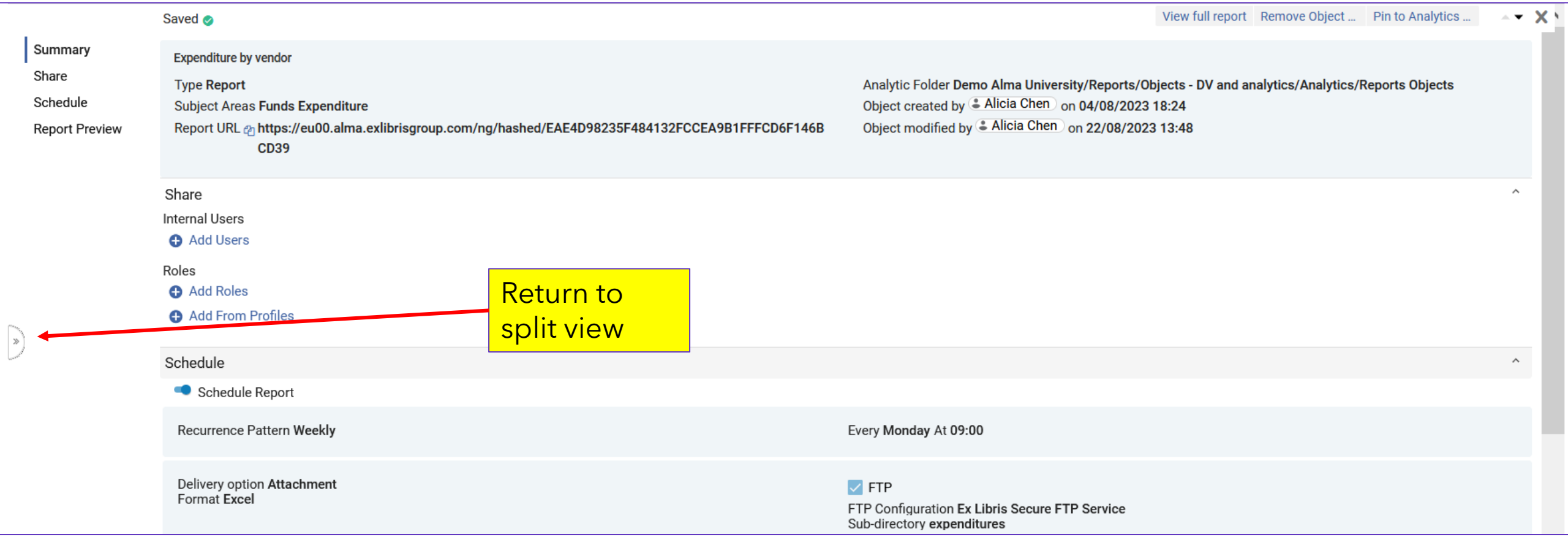


# Presentation Toggle Button



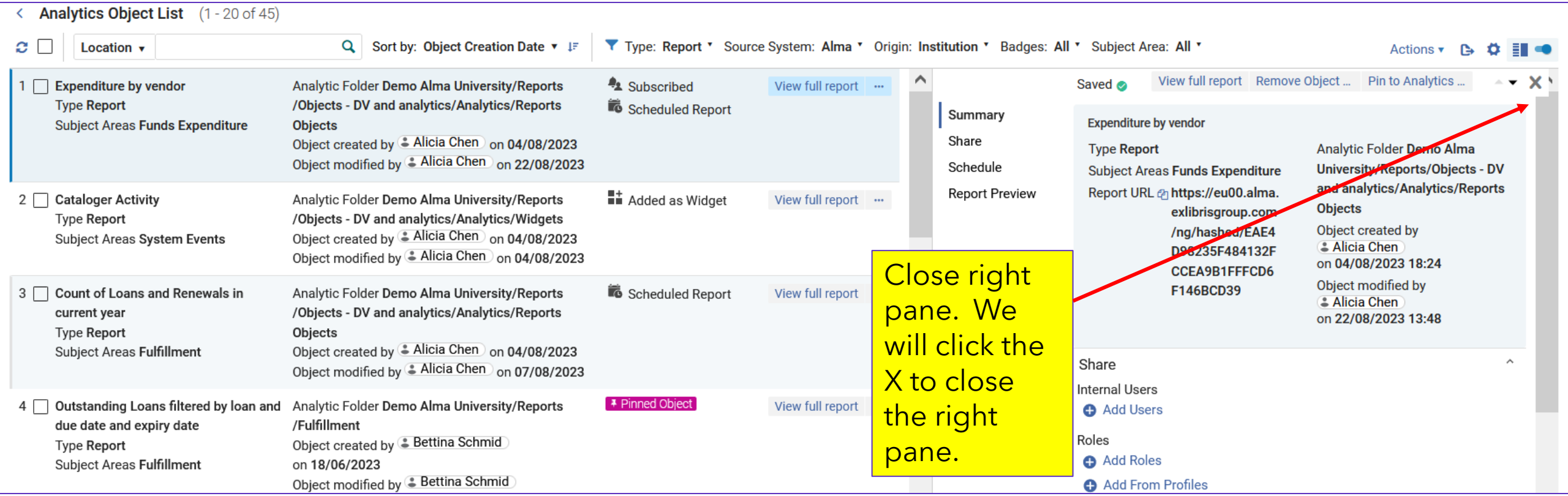
# Presentation Toggle Button

- The staff user can easily switch between split view and full view



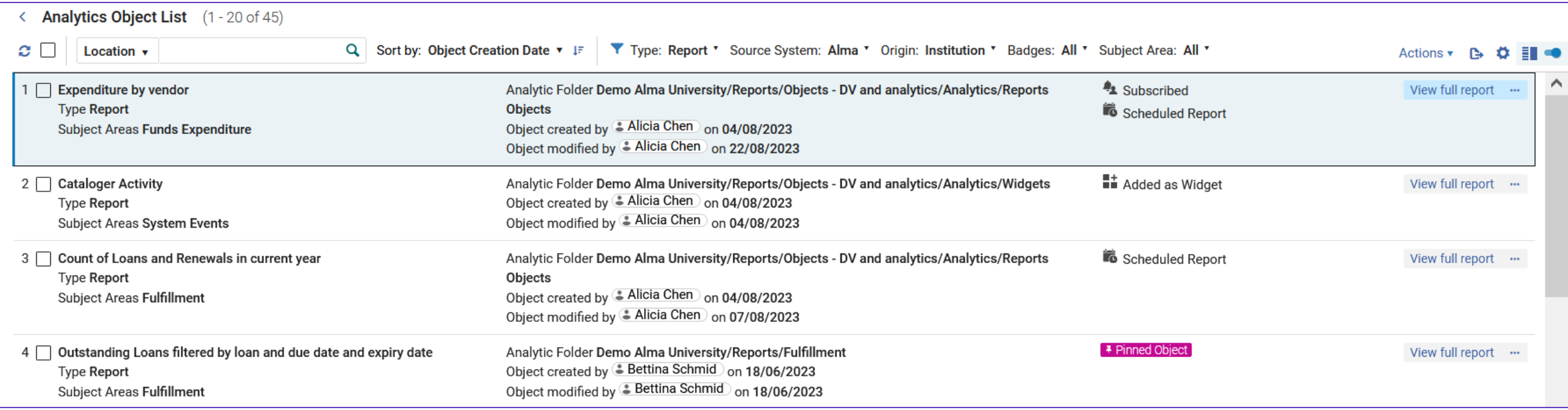
# Presentation Toggle Button

- The staff user can return to list view by closing the right pane



# Presentation Toggle Button

- Now we are back at list view

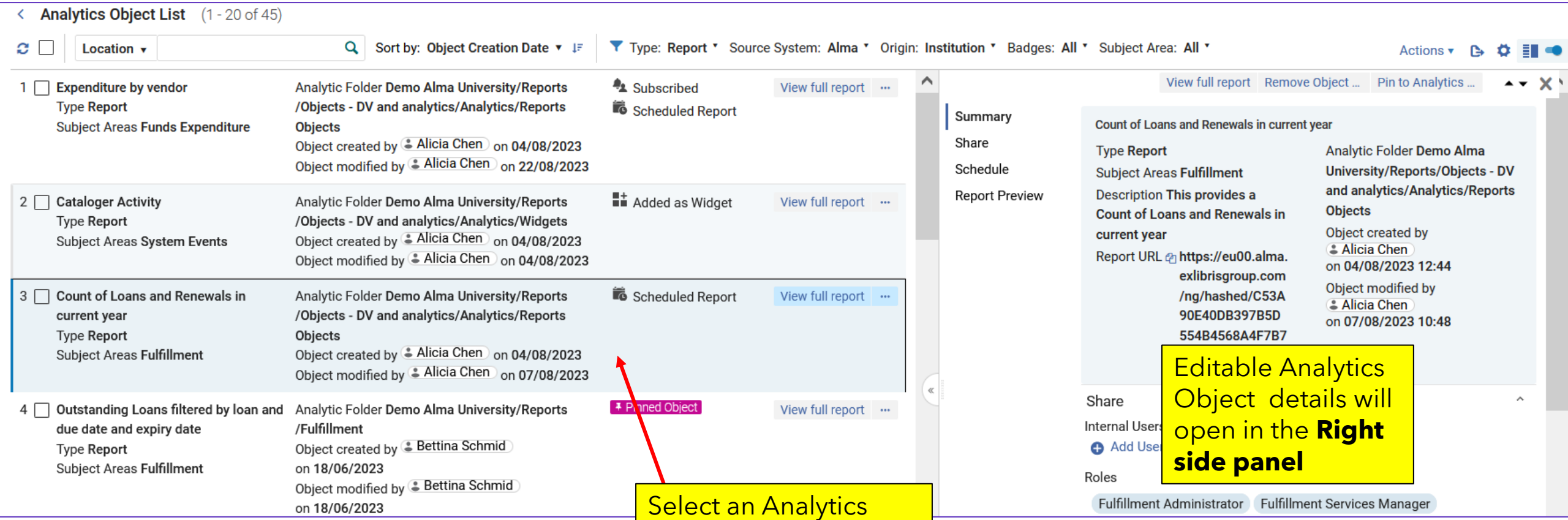


# Split View (Side By Side View)

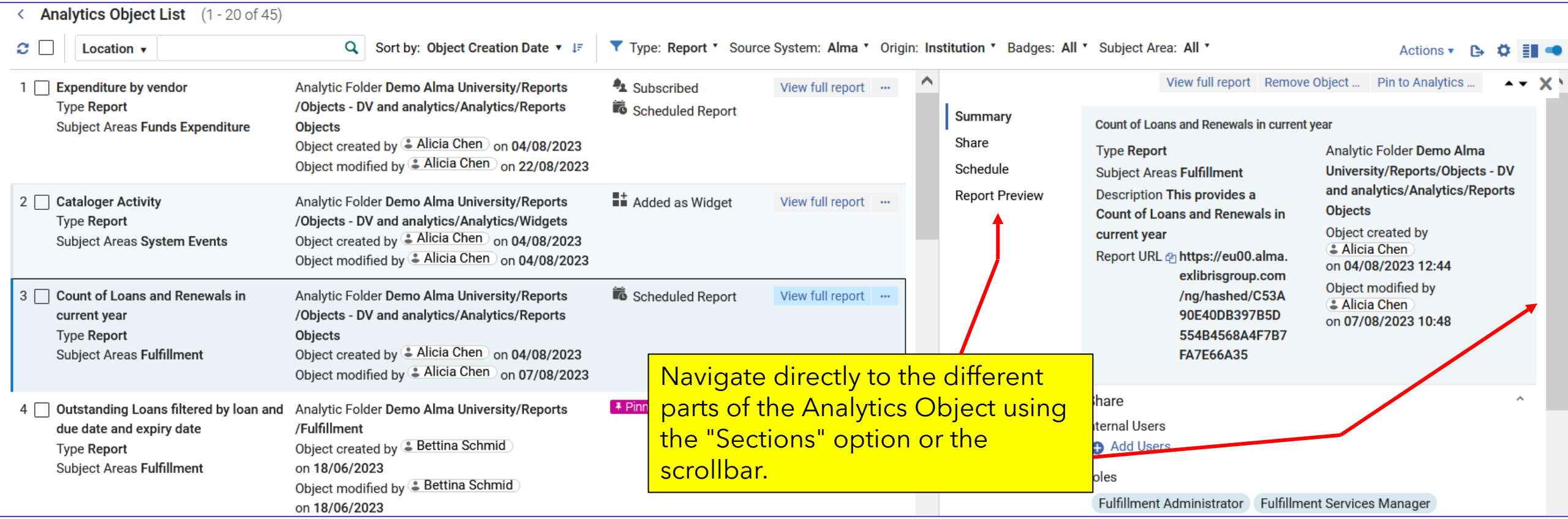
# Split View (Side By Side View)

- The "Side By Side View" presentation enables users to view a list of Analytics Objects on one side and detailed information regarding the selected Analytics Object on the other side.
- The right panel holds relevant information regarding the Analytics Object, for users with relevant roles.
- This information is editable from the panel itself, preventing users from the need to navigate to a specific Analytics Object editing screen.

# Split View (Side By Side View)

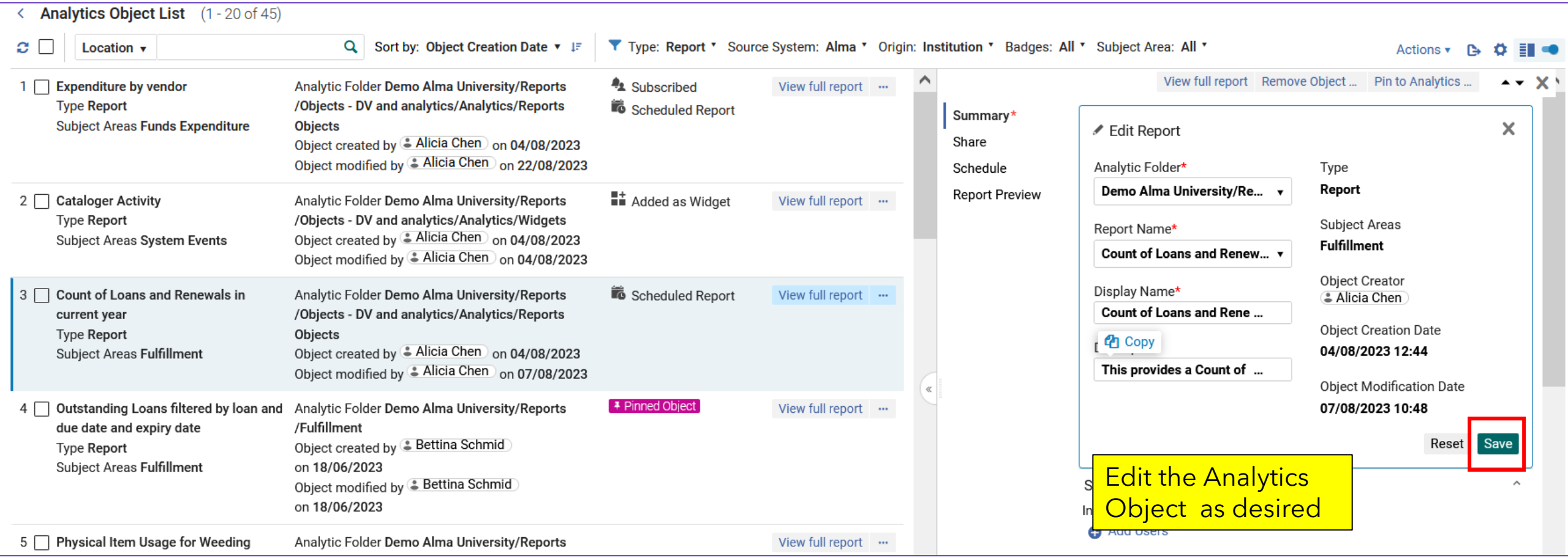


# Split View (Side By Side View)



# Split View (Side By Side View)

- The Analytics Object  can be edited in the right-side panel.



# Viewing the report from within the object

# Viewing the report from within the object

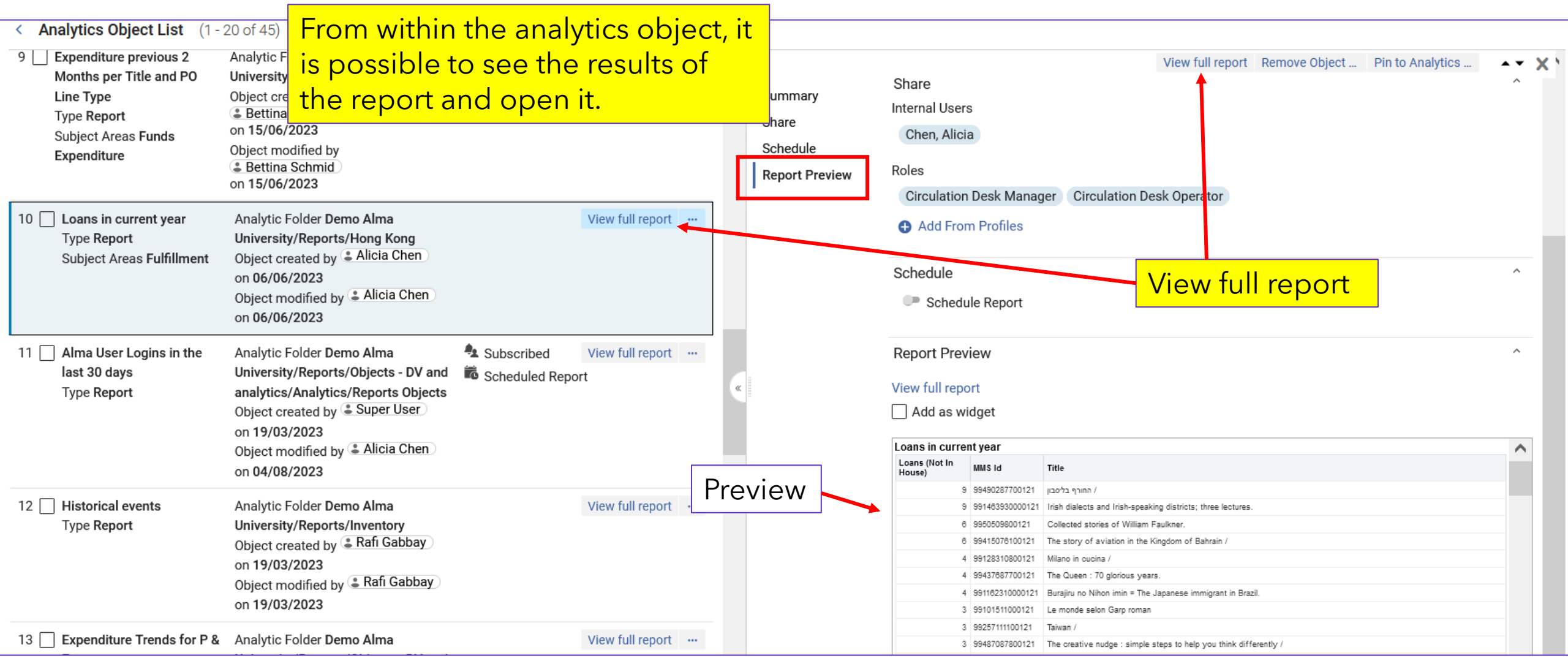
- While editing or viewing an analytics object it is possible to both

1. Preview the analytics report associated with the object
2. View the full analytics report associated with the object

- This can save a lot of time, preventing the need for the staff user to ask the analytics designer what the report is.
- The staff user can immediately see if it is relevant to him or herself.

# Viewing the report from within the object

From within the analytics object, it is possible to see the results of the report and open it.



# Viewing the report from within the object

- Clicking “View Full Report” opens the full report in another browser tab

**Loans in current year**

| Loans (Not In House) | MMS Id | Title |
|---|---|---|
| 9 | 99490287700121 | החורף בליסבון / |
| 9 | 991463930000121 | Irish dialects and Irish-speaking districts; three lectures. |
| 6 | 9950509800121 | Collected stories of William Faulkner. |
| 6 | 99415076100121 | The story of aviation in the Kingdom of Bahrain / |
| 4 | 99128310800121 | Milano in cucina / |
| 4 | 99437687700121 | The Queen : 70 glorious years. |
| 4 | 991162310000121 | Burajiru no Nihon imin = The Japanese immigrant in Brazil. |
| 3 | 99101511000121 | Le monde selon Garp roman |
| 3 | 99257111100121 | Taiwan / |
| 3 | 99487087800121 | The creative nudge : simple steps to help you think differently / |
| 3 | 99490087600121 | Revenge : Meghan, Harry and the war between the Windsors / |
| 3 | 99492987800121 | Burning the books : a history of knowledge under attack / |

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Part of Clarivate

IGeLU
International Group of Ex Libris Users

# Thank you!

**Yoel Kortick**
Yoel.Kortick@Clarivate.com

We hope you enjoyed our presentation as much as we did!

**Please fill out this short survey:**

https://www.surveymonkey.com/r/QPLJYZT

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# The Pinned Objects and the Report URL

Explanation and Live Demonstration

Yoel Kortick
Senior Librarian

## Introduction

## Pinned Objects

## Report URLs

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# Introduction

# Introduction

- A “Pinned Object” is a quick link defined by the user to appear in Alma when he or she clicks the “Analytics” menu
  - This allows the user to access reports based on his or her user roles.
  - The Pinned Objects appear in the analytics menu, can be reordered as desired, and can also be searched.

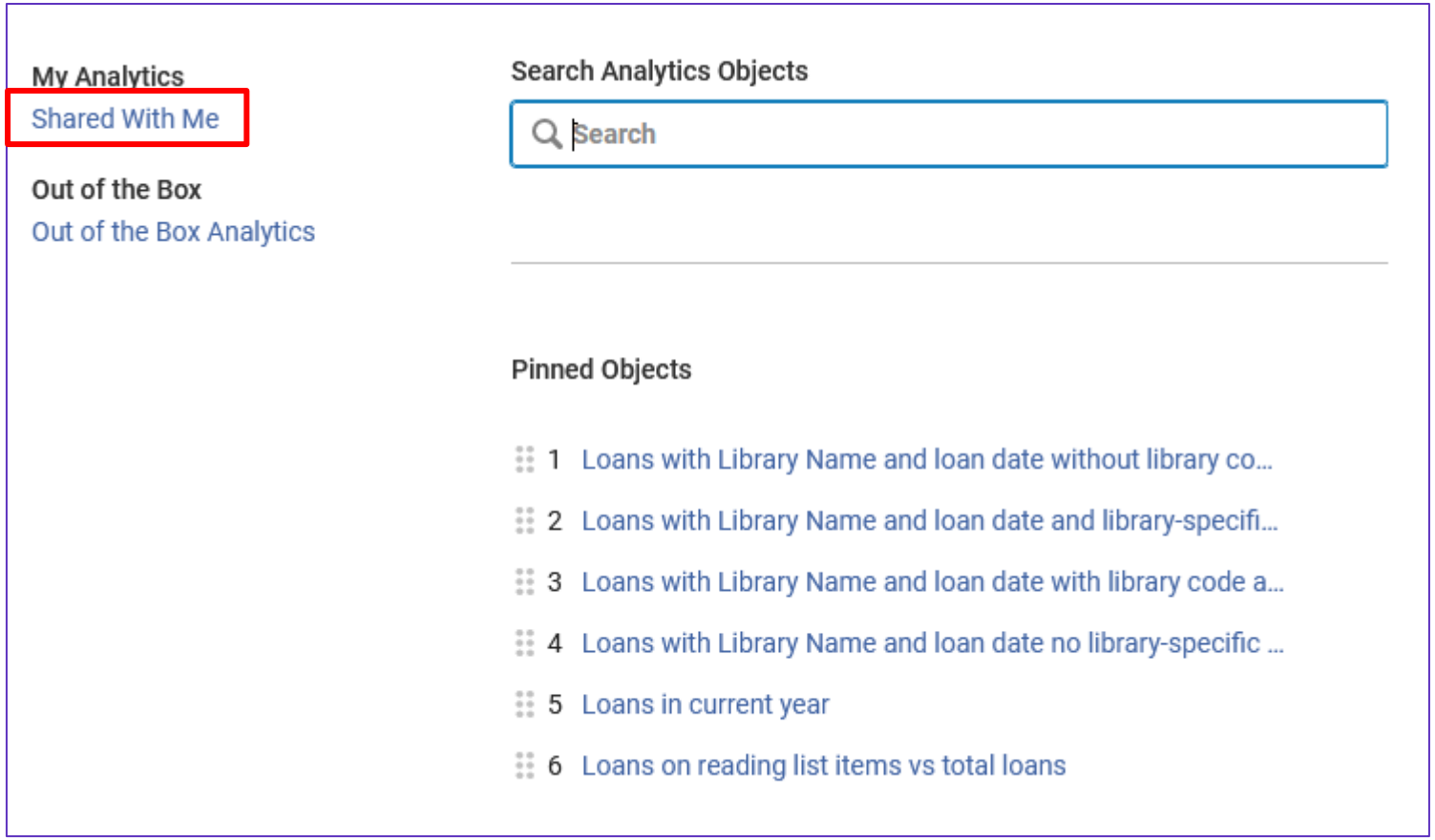
# Introduction

- A “Report URL” is a URL which the user can paste in the browser to access the report.  It can, for example, be put in a bookmark or sent to a colleague.
  - It works when the staff user is logged in and accesses the report using the URL in an additional browser tab
  - It will not work if the staff user is not logged into Alma (and it looks at the roles of the logged in user in accordance with the roles in the analytics object)

# Pinned Objects

# Pinned Objects

- The “Shared With Me” link provides a list of all Analytics Objects which have at least one role which the logged in user has.



# Pinned Objects

- For example, if the logged in user (Suzan Aarons) has these roles …

User Roles

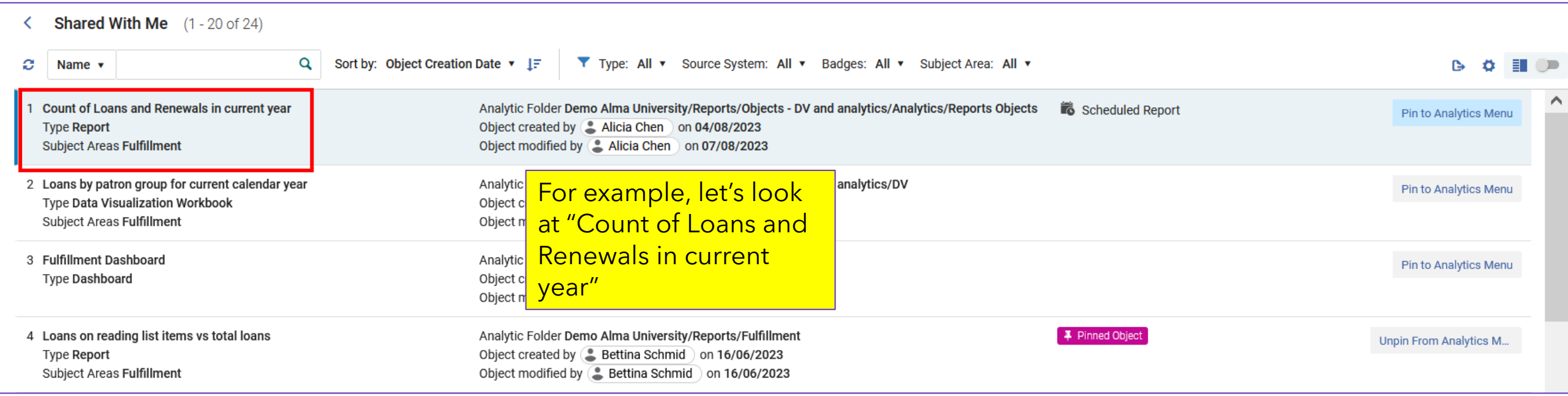
1 - 7 of 7

Filter : All

| | Active | Role Name | Role Area | Scope | Parameters | Status Date |
|---|---|---|---|---|---|---|
| 1 | | Circulation Desk Manager | Fulfillment | Library of Chinese Studies | Default Circulation Desk | 06/06/2023 |
| 2 | | Circulation Desk Operator | Fulfillment | Library of Chinese Studies | Default Circulation Desk | 06/06/2023 |
| 3 | | Fulfillment Administrator | Fulfillment | Alma University | - | 05/03/2023 |
| 4 | | Fulfillment Services Manager | Fulfillment | Alma University | - | 05/03/2023 |
| 5 | | Fulfillment Services Operator | Fulfillment | Alma University | - | 05/03/2023 |
| 6 | | Library Level Analytics consumer | Miscellaneous | Science Library | - | 05/03/2023 |
| 7 | | Patron | Fulfillment | Alma University | - | 05/03/2023 |

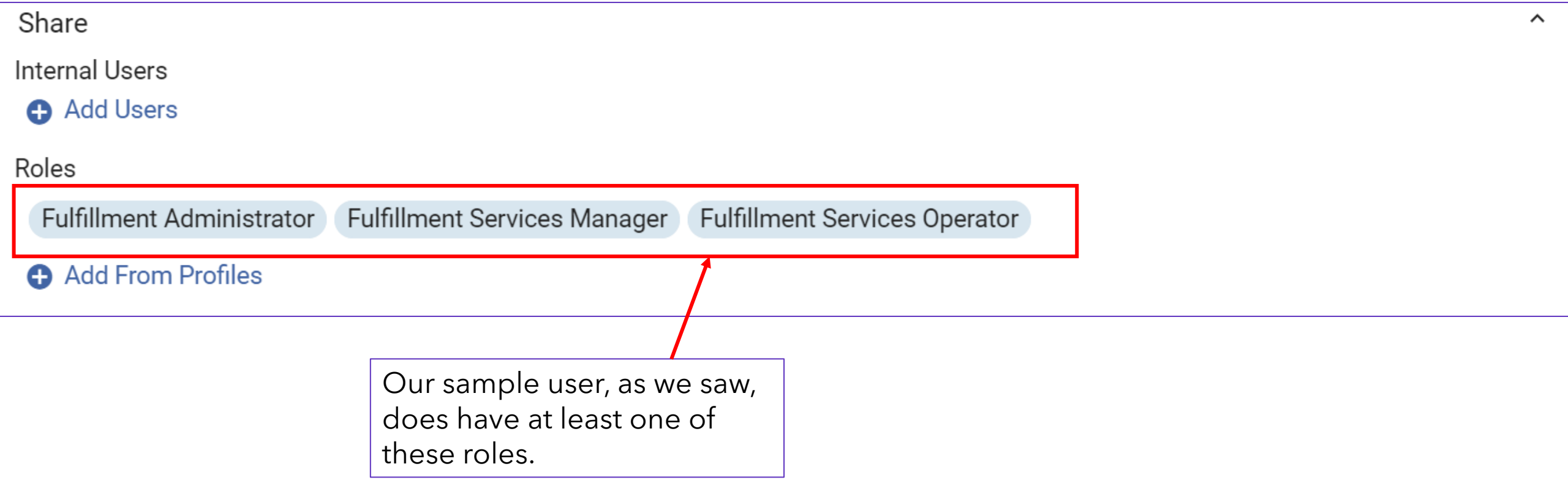
# Pinned Objects

- Then all of the analytics object which he or she will see after clicking "Shared with me" will have at least one of those roles.



# Pinned Objects

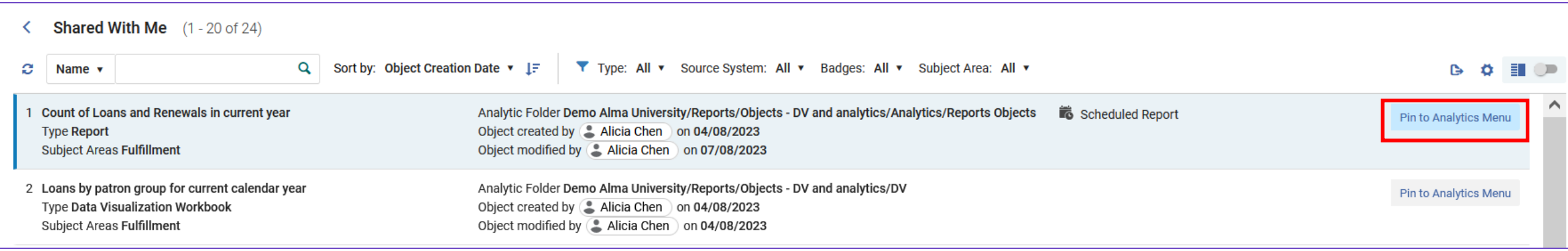
- In order to see this Analytics Object after clicking "Shared with me" the logged in user will need to have at least one of these roles.




Our sample user, as we saw, does have at least one of these roles.

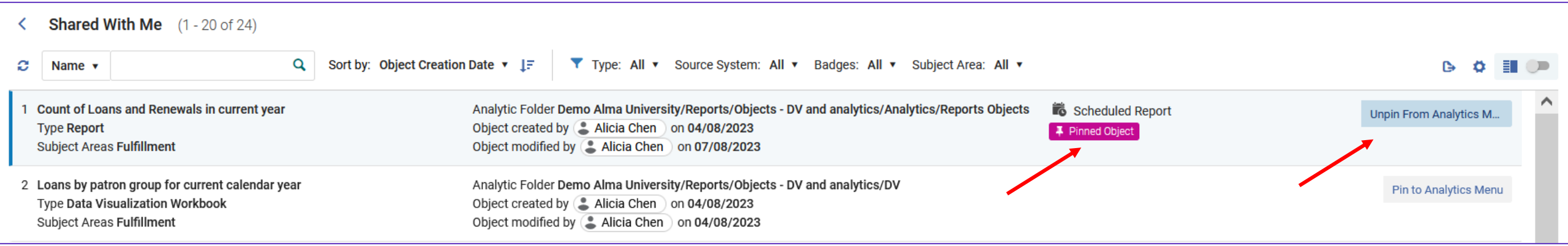
# Pinned Objects

- Here the logged in user will click “Pin to Analytics Menu” for “Count of Loans and Renewals in current year”



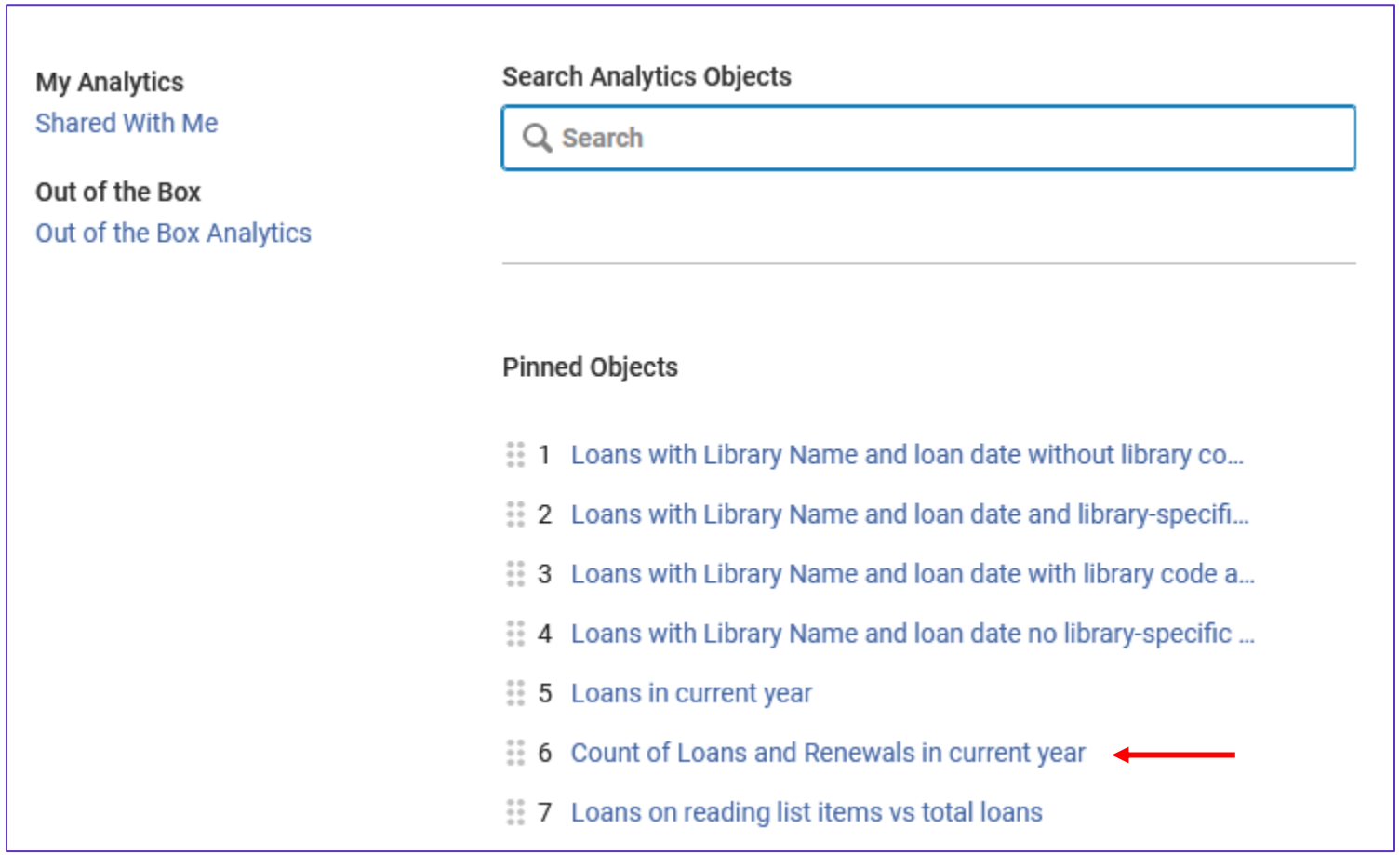
# Pinned Objects

- It now appears with the badge “Pinned Object” and an option to “Unpin from Analytics Menu”



# Pinned Objects

- The report is now in the user's Pinned Objects



# Pinned Objects

- After clicking the report in the Pinned Objects, it opens in a new tab.

| User Group | Loans (Not In House) | Renewals |
|---|---|---|
| Administrative Staff | 410 | 74 |
| Alumni | 121 | 3 |
| Faculty | 189 | 49 |
| Graduate Student | 289 | 38 |
| Undergraduate Student | 1,619 | 207 |

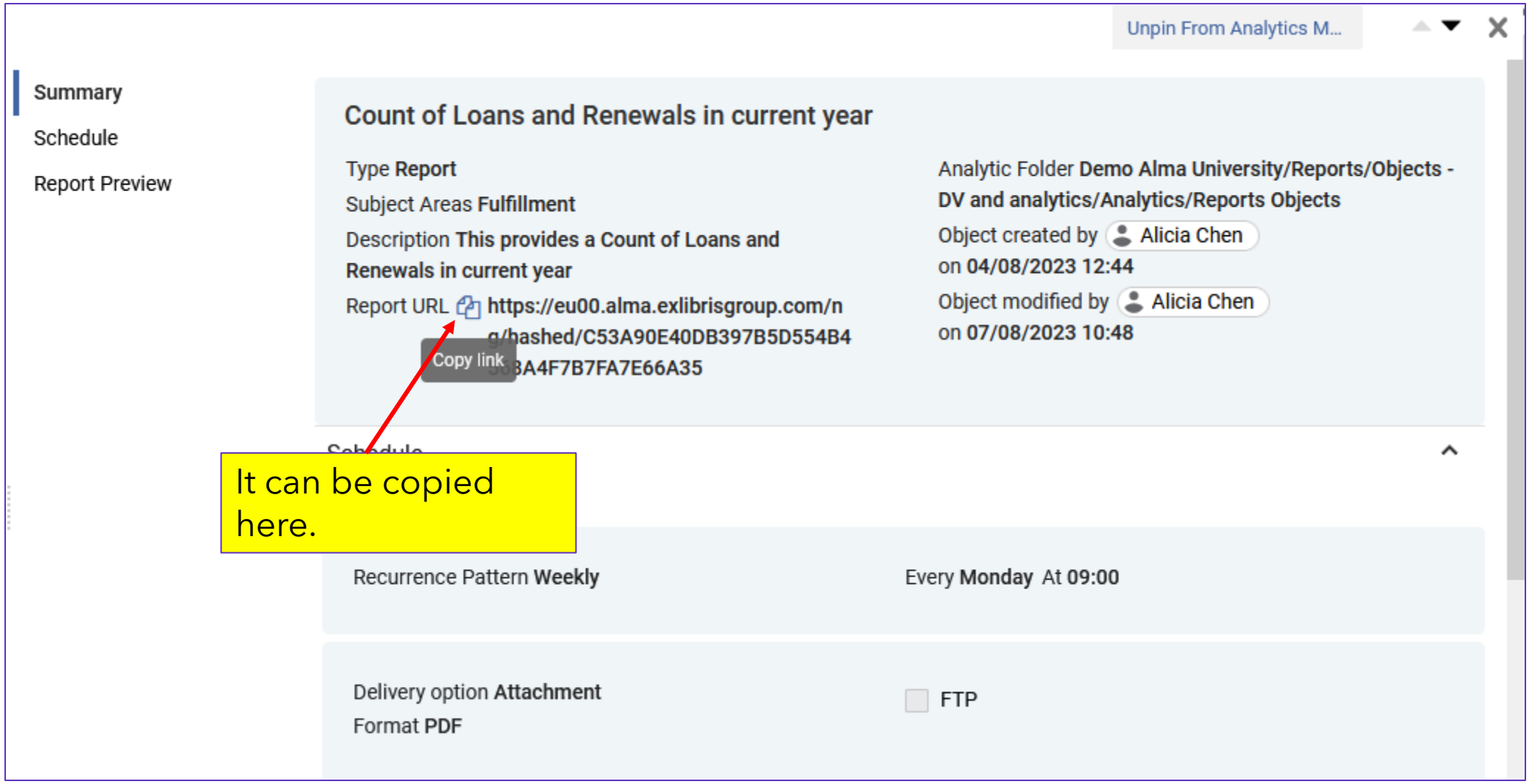
Refresh - Print - Export

# Report URLs

# Report URLs

- The report URL appears in the analytics object.
- It can be viewed and copied by the staff user when he or she sees the list of Analytics Objects via the “shared with me” option.

# Report URLs


Unpin From Analytics M...
Summary
Schedule
Report Preview
Count of Loans and Renewals in current year
Type Report
Subject Areas Fulfillment
Description This provides a Count of Loans and Renewals in current year
Report URL https://eu00.alma.exlibrisgroup.com/n
g/hashed/C53A90E40DB397B5D554B4
Copy link
3A4F7B7FA7E66A35
Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects
Object created by Alicia Chen
on 04/08/2023 12:44
Object modified by Alicia Chen
on 07/08/2023 10:48
It can be copied here.
Recurrence Pattern Weekly
Every Monday At 09:00
Delivery option Attachment
Format PDF
FTP

# Report URLs

- The URL can be, for example, bookmarked or shared with colleagues.
- If a user tries use the URL to view the report, then it will work only if

A. The user is logged into Alma
B. The user has at least one role which is in the analytics object

- This prevents non authorized users from viewing the analytics report.

# Report URLs

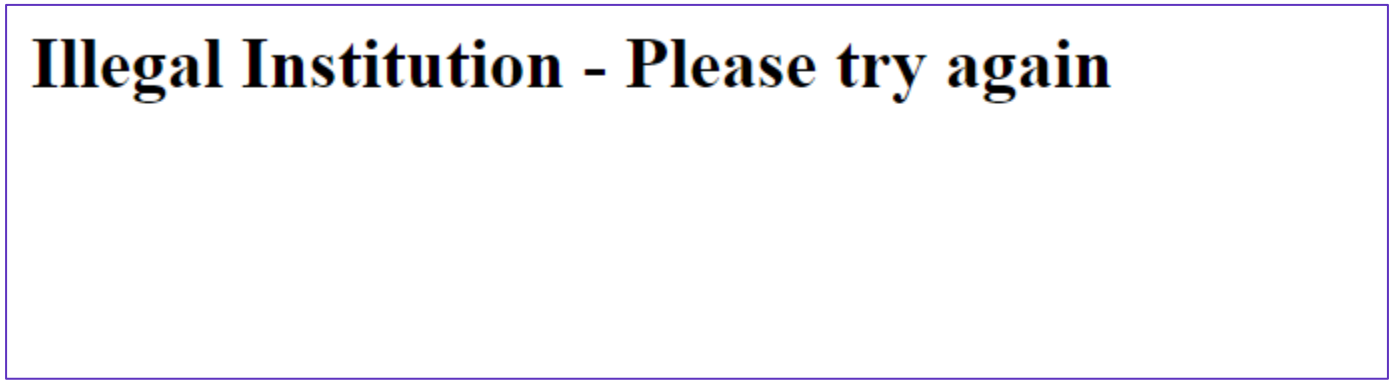
- For example, when a logged in user with a correct role pastes the URL in his or her browser, he or she will see the report

| User Group | Loans (Not In House) | Renewals |
|---|---|---|
| Administrative Staff | 410 | 74 |
| Alumni | 121 | 3 |
| Faculty | 189 | 49 |
| Graduate Student | 289 | 38 |
| Undergraduate Student | 1,619 | 207 |

Refresh - Print - Export

# Report URLs

- If a non-authorized user (a user not logged into Alma or a user logged into Alma but does not have  relevant role) tries to use the URL this will be the result:



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