



# 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



# 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 an 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:

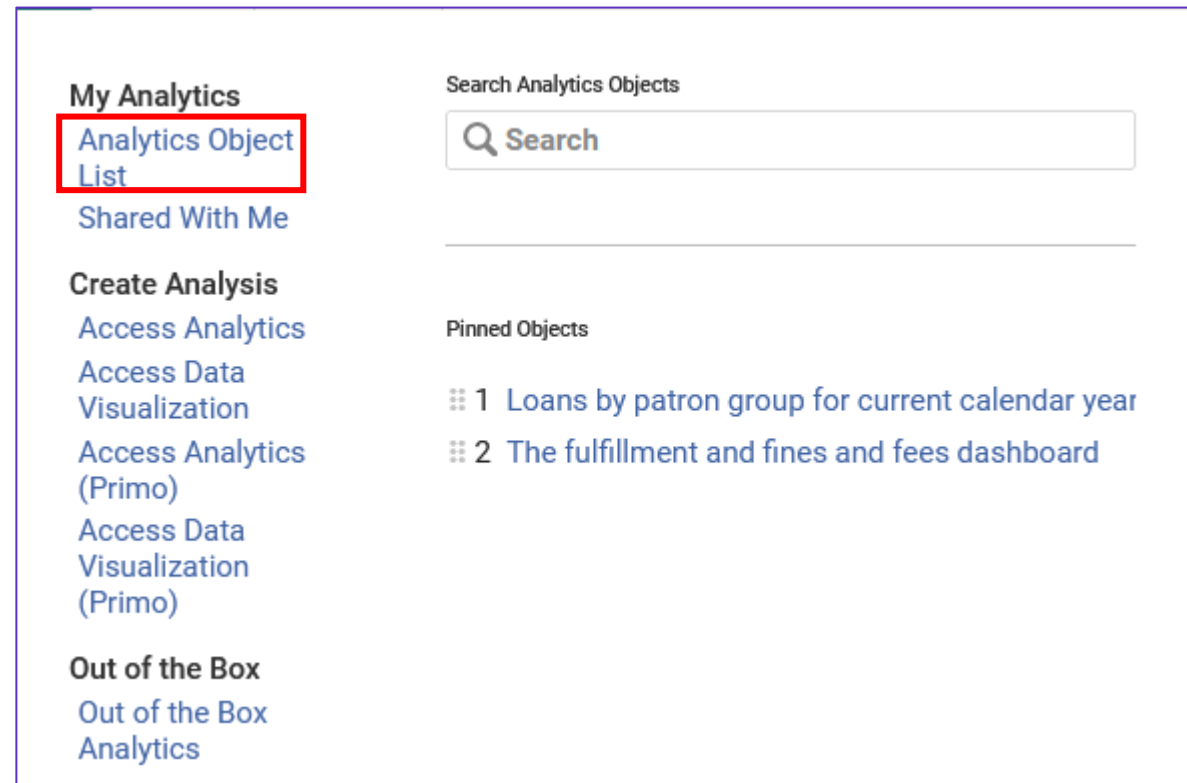
User Group ▲▼	Loans (Not In House)	Renewals
Administrative Staff	410	74
Alumni	121	3
Faculty	189	49
Graduate Student	289	38
Undergraduate Student	1,619	207



# Creating an analytics object

## Creating an analytics object

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

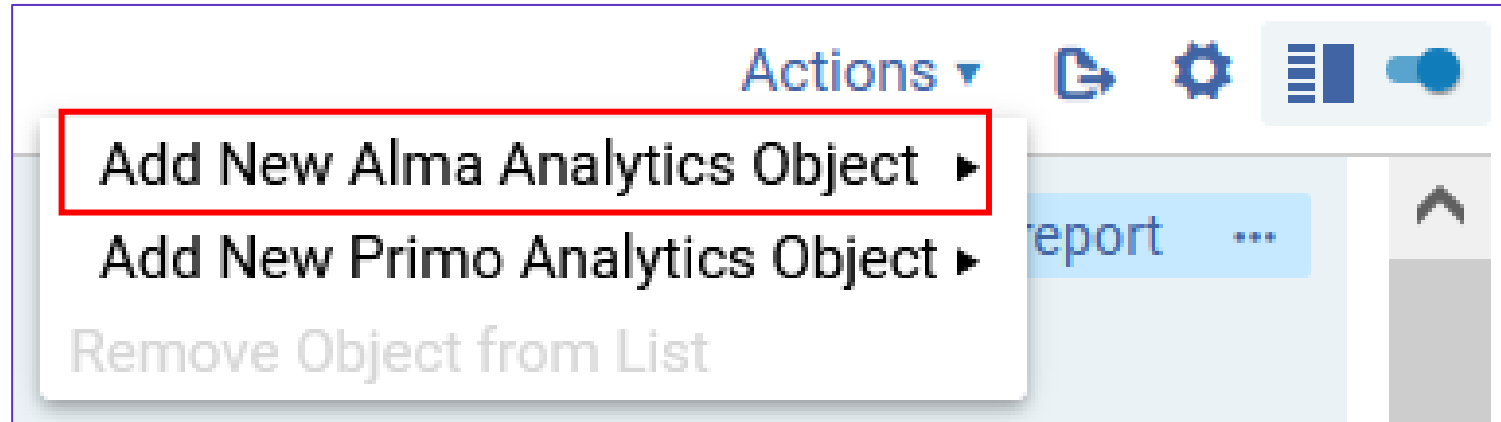


The screenshot displays the 'My Analytics' interface. On the left sidebar, under the 'My Analytics' heading, the 'Analytics Object List' link is highlighted with a red rectangular box. Below it are links for 'Shared With Me', 'Create Analysis', 'Access Analytics', 'Access Data Visualization', 'Access Analytics (Primo)', 'Access Data Visualization (Primo)', and 'Out of the Box Analytics'. The main content area features a search bar titled 'Search Analytics Objects' with a magnifying glass icon and the text 'Search'. Below the search bar is a horizontal line, followed by a section titled 'Pinned Objects' containing two items: '1 Loans by patron group for current calendar year' and '2 The fulfillment and fines and fees dashboard'.



## 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.


Count of Loans and Renewals in current year


Type Report

Subject Areas Fulfillment

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7FA7E66A35>

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 04/08/2023 12:44

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

## 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:

The screenshot shows a 'Schedule' configuration panel with the following elements and callouts:

- Schedule Report:** A toggle switch that is currently turned on. Callout: "Toggle the 'Schedule Report' to be active".
- Recurrence Pattern:** Set to "Weekly" with a sub-option of "Every Monday At 09:00". Callout: "Select the desired Recurrence Pattern".
- Delivery option:** Set to "Attachment". Callout: "Select whether it should be sent as a link or attachment or via FTP".
- Format:** Set to "PDF". Callout: "Select desired format".
- FTP:** An unchecked checkbox. Callout: "Select whether it should be sent as a link or attachment or via FTP".

## 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

Schedule ^

Schedule Report

Recurrence Pattern **Weekly** Every Monday At 09:00

Delivery option **Attachment**  FTP

Format **PDF**

Subscribe to the analytics object

[+ Manage Subscription](#)

# Creating an analytics object

Subscribers

[+ Add Row](#)

No records were found.

**Add Row**

User  Preferred Email

Subscribers

[+ Add Row](#)

↕User	↕Preferred Email	↕Updated By	↕Last Updated	
1 -	<input type="text" value="jimmy.smith@university.edu"/>	AliciaC613	-	⋮

## 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

The screenshot shows a software interface with a menu on the left and a main content area on the right. The menu items are: Summary, Share, Schedule, and Report Preview. The 'Share' item is highlighted with a vertical blue bar. The main content area has a header 'Share' and two sub-sections: 'Internal Users' and 'Roles'. Under 'Internal Users', there is a button '+ Add Users'. Under 'Roles', there are two buttons: '+ Add Roles' (which is highlighted with a red rectangular box) and '+ Add From Profiles'.

# Creating an analytics object

Roles

Fulfillment Services Manager x Fulfillment Services Operator x Fulfillment Administrator x

Q Select a value

+ Add From Profiles





**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 be subscribed to the scheduled report.

User Roles

1 - 5 of 5

Filter: All

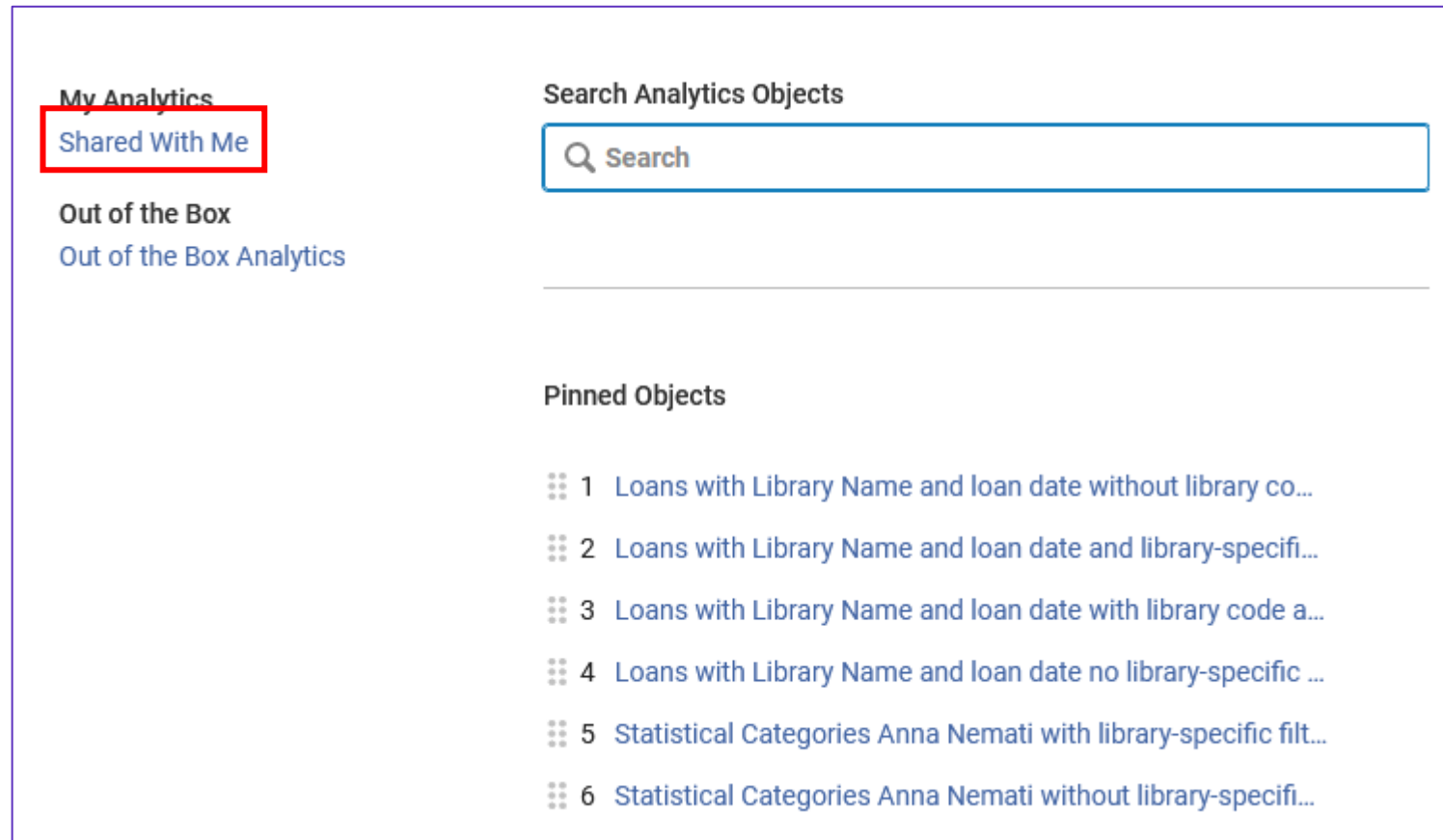
	<input type="checkbox"/>	Active	Role Name	Role Area		Status Date		
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulfillment Administrator	Fulfillment	Alma University	-	05/03/2023	...
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulfillment Services Manager	Fulfillment	Alma University	-	05/03/2023	...
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Alma University	-	05/03/2023	...
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Library Level Analytics consumer	Miscellaneous	Art Library	-	05/03/2023	...
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	28/04/2017	...

+ Add Role + Add from Profiles - Remove Selected

User 'Aaron Hacothen' has at least one of the relevant roles.

## Subscribing to and receiving the scheduled report

- User 'Aaron Hacoheh' logs in and does "Analytics > My Analytics > Shared With Me"



The screenshot displays the 'My Analytics' dashboard. On the left, under the heading 'My Analytics', the 'Shared With Me' option is highlighted with a red rectangular box. Below it, the 'Out of the Box' section contains the link 'Out of the Box Analytics'. On the right, the 'Search Analytics Objects' section features a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a horizontal line. Underneath the line, the 'Pinned Objects' section lists six items, each preceded by a grid icon and a number:

- 1 Loans with Library Name and loan date without library co...
- 2 Loans with Library Name and loan date and library-specifi...
- 3 Loans with Library Name and loan date with library code a...
- 4 Loans with Library Name and loan date no library-specific ...
- 5 Statistical Categories Anna Nemati with library-specific filt...
- 6 Statistical Categories Anna Nemati without library-specifi...

## 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

The screenshot shows a web interface for 'Shared With Me' (1 - 20 of 23). At the top, there is a search bar with 'Name' and a search icon. To the right are filters for 'Sort by: Object Creation Date', 'Type: All', 'Source System: All', 'Badges: All', and 'Subject Area: All'. Below the search bar, a report titled 'Count of Loans and Renewals in current year' is highlighted with a red box. The report details include: 'Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects', 'Object created by Alicia Chen on 04/08/2023', and 'Object modified by Alicia Chen on 04/08/2023'. A 'Scheduled Report' icon is visible to the right of the report details, and a 'Pin to Analytics Menu' button is in the top right corner.

# Subscribing to and receiving the scheduled report

- Then the logged in user will subscribe to the report

Summary  
Schedule  
Report Preview

Count of Loans and Renewals in current year

Type Report  
Subject Areas Fulfillment  
Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7FA7E66A35>

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 on 04/08/2023 14:02

Schedule

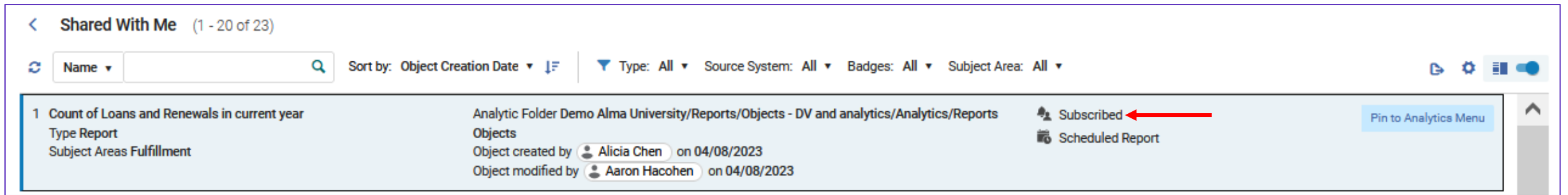
Recurrence Pattern Weekly Every Monday At 09:00

Delivery option Attachment  
Format PDF  FTP

Subscribe to the analytics object

## Subscribing to and receiving the scheduled report

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



The screenshot shows a user interface for managing reports. At the top, it says "Shared With Me (1 - 20 of 23)". Below this is a search bar with "Name" and a search icon. To the right of the search bar are filters: "Sort by: Object Creation Date", "Type: All", "Source System: All", "Badges: All", and "Subject Area: All". On the far right of the filter area are icons for a share, settings, list, and a toggle switch.

The main content area displays a list of reports. The first report is "1 Count of Loans and Renewals in current year". It has a "Type Report" of "Subject Areas Fulfillment". The report details include "Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects". It was "Object created by Alicia Chen on 04/08/2023" and "Object modified by Aaron Hacoen on 04/08/2023".

On the right side of the report entry, there are two status indicators: "Subscribed" with a red arrow pointing to it, and "Scheduled Report". A "Pin to Analytics Menu" button is also visible on the right.



## Subscribing to and receiving the scheduled report

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

	Job Category : All	Status : All	Submit Date Range	03/08/2023 - 04/08/2023		
	◆ Name	◆ Process ID	◆ Job Category	◆ Status	◆ Start Date	◆ End Date
1	<a href="#">Schedule of Analytics reports and dashboards - Count of Loans and Renewals in current year</a>	75615880500...	Analytics	✔ Completed Successfully	04/08/2023 13:17	04/08/2023 13:17

# Subscribing to and receiving the scheduled report

- The user gets the email with the attachment.

The screenshot displays an email interface. At the top, the subject is "Count of Loans and Renewals in current year". The sender is "Your.Department@exlibrisgroup.com". The recipient is "Yoel Kortick". A PDF attachment titled "Count of Loans and Renewals in current year.pdf" (2 KB) is highlighted with a red box. The email header includes the ExLibris Alma University logo, the title "Analytics Automatic Email EU Alma University", the date "04/08/2023", and the salutation "Dear Sir/Madam Hacohen", where "Hacohen" is also highlighted with a red box. The body text states: "Attached please find the following Analytics report to which you are subscribed: Count of Loans and Renewals in current year". The footer features the "Alma University" logo.



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*International Group of Ex Libris Users*

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# Analytics Menu Entries in Alma

Introduction

Yoel Kortick  
Senior Librarian

## The analytics menu entries



# 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

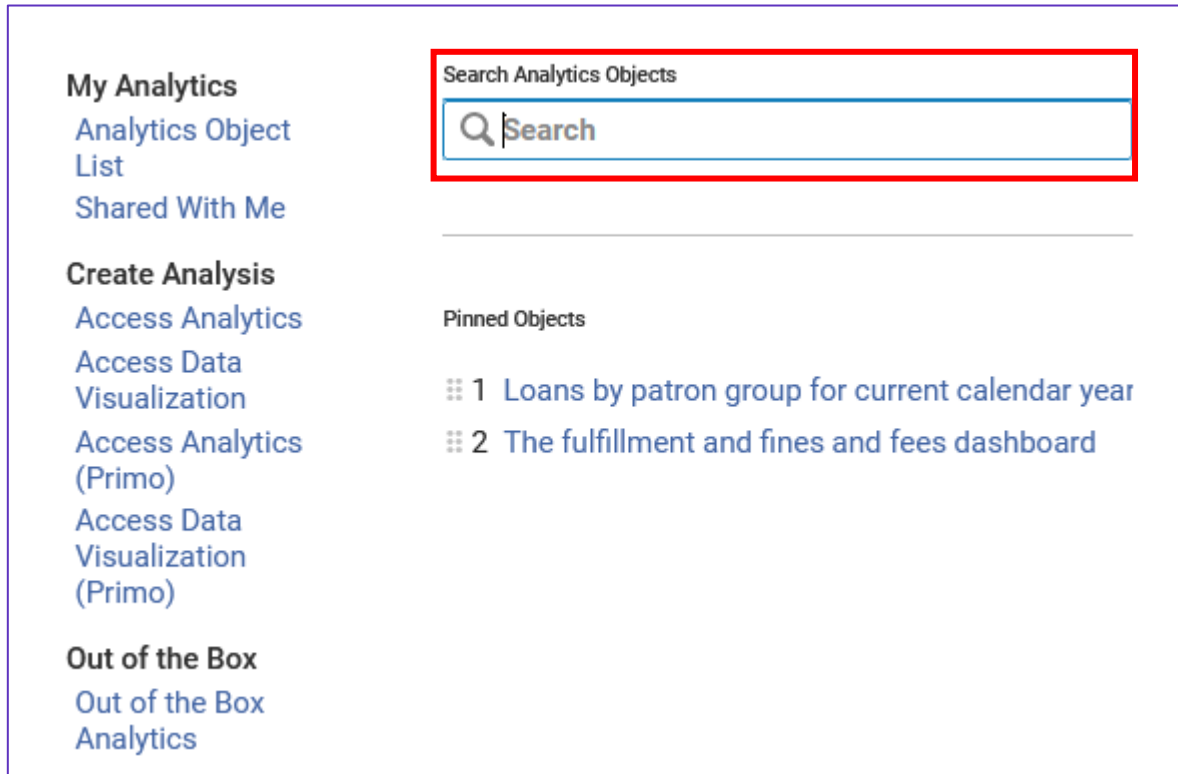
- Accessing the analytics menu

The screenshot displays the Ex Libris analytics menu. On the left, a dark sidebar lists navigation options: Alma Production, Market, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics (highlighted with a red box). The main content area is divided into sections: 'My Analytics' (Analytics Object List, Shared With Me), 'Create Analysis' (Access Analytics, Access Data Visualization, Access Analytics (Primo)), and 'Out of the Box Analytics'. On the right, there is a search bar for 'Search Analytics Objects' and a 'Pinned Objects' section with two items: '1 Loans by patron group for current calendar year' and '2 The fulfillment and fines and fees dashboard'.



## 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.

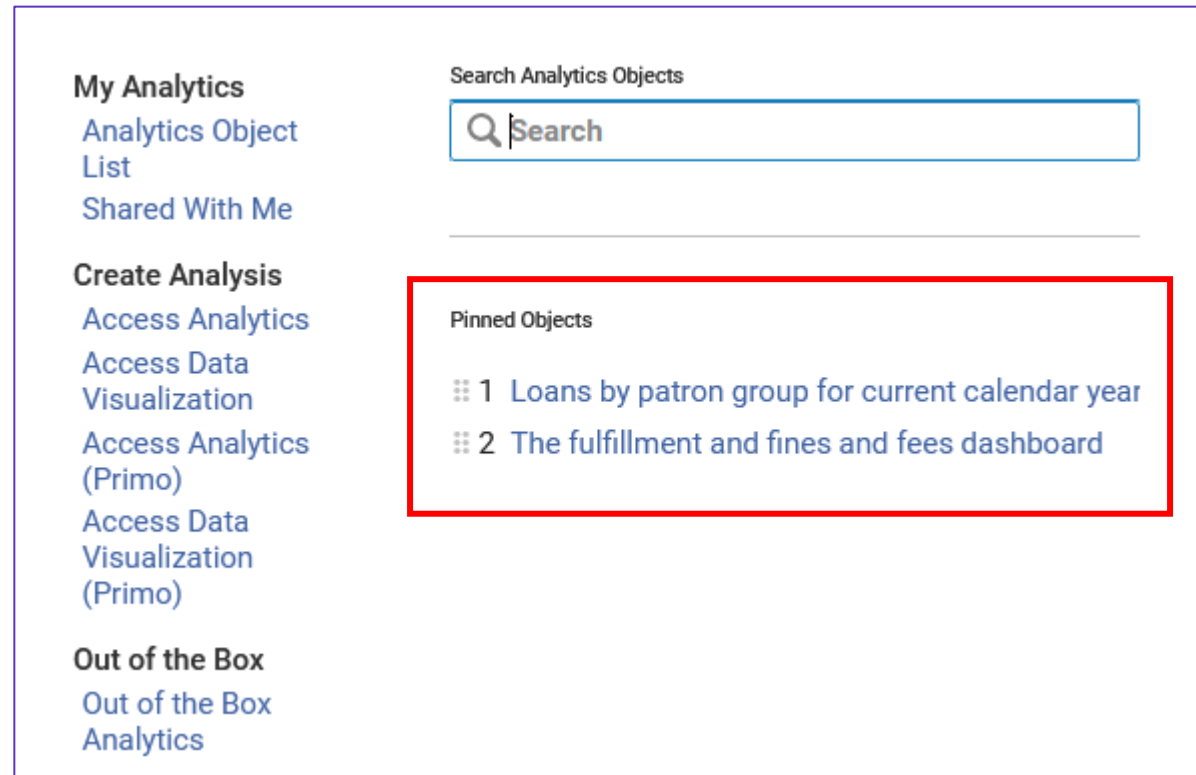


The screenshot displays a sidebar menu on the left and a main content area on the right. The sidebar menu is organized into three sections: "My Analytics" with sub-items "Analytics Object List" and "Shared With Me"; "Create Analysis" with sub-items "Access Analytics", "Access Data Visualization", "Access Analytics (Primo)", and "Access Data Visualization (Primo)"; and "Out of the Box" with sub-item "Out of the Box Analytics". The main content area features a search bar titled "Search Analytics Objects" with a magnifying glass icon and the text "Search". Below the search bar is a horizontal line, followed by a section titled "Pinned Objects" containing two entries: "1 Loans by patron group for current calendar year" and "2 The fulfillment and fines and fees dashboard". A red rectangular box highlights the search bar area.

## 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 screenshot displays the analytics menu interface. On the left, there are three main sections: 'My Analytics' with sub-items 'Analytics Object List' and 'Shared With Me'; 'Create Analysis' with sub-items 'Access Analytics', 'Access Data Visualization', and 'Access Analytics (Primo)'; and 'Out of the Box' with sub-item 'Out of the Box Analytics'. On the right, there is a search bar labeled 'Search Analytics Objects' with a magnifying glass icon and the text 'Search'. Below the search bar, a red box highlights the 'Pinned Objects' section, which contains two items: '1 Loans by patron group for current calendar year' and '2 The fulfillment and fines and fees dashboard'.

## 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.

**My Analytics**  
**Analytics Object List**  
Shared With Me

**Create Analysis**  
Access Analytics  
Access Data  
Visualization  
Access Analytics (Primo)  
Access Data  
Visualization (Primo)

**Out of the Box**  
Out of the Box  
Analytics

Search Analytics Objects  
Search

Pinned Objects

- 1 Loans by patron group for current calendar year
- 2 The fulfillment and fines and fees dashboard

## The analytics menu entries

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

**My Analytics**  
Analytics Object List  
**Shared With Me**  
Create Analysis  
Access Analytics  
Access Data Visualization  
Access Analytics (Primo)  
Access Data Visualization (Primo)  
Out of the Box  
Out of the Box Analytics

Search Analytics Objects  
Q Search

Pinned Objects

- 1 Loans by patron group for current calendar year
- 2 The fulfillment and fines and fees dashboard

## 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.

**My Analytics**  
Analytics Object List  
Shared With Me  
**Create Analysis**  
Access Analytics  
Access Data Visualization  
Access Analytics (Primo)  
Access Data Visualization (Primo)

**Out of the Box**  
Out of the Box Analytics

Search Analytics Objects  
Search

Pinned Objects

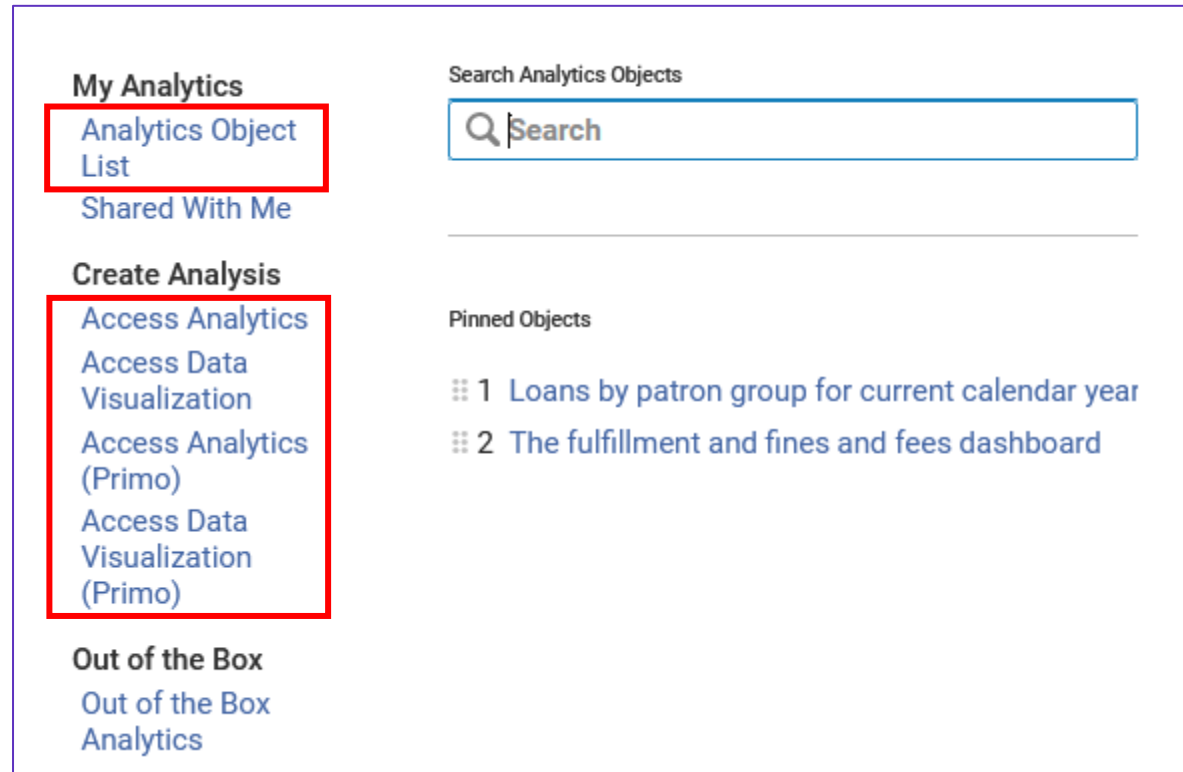
- 1 Loans by patron group for current calendar year
- 2 The fulfillment and fines and fees dashboard

## 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 if the logged in user has role ‘Analytics Administrator’ or ‘General System Administrator’

## The analytics menu entries

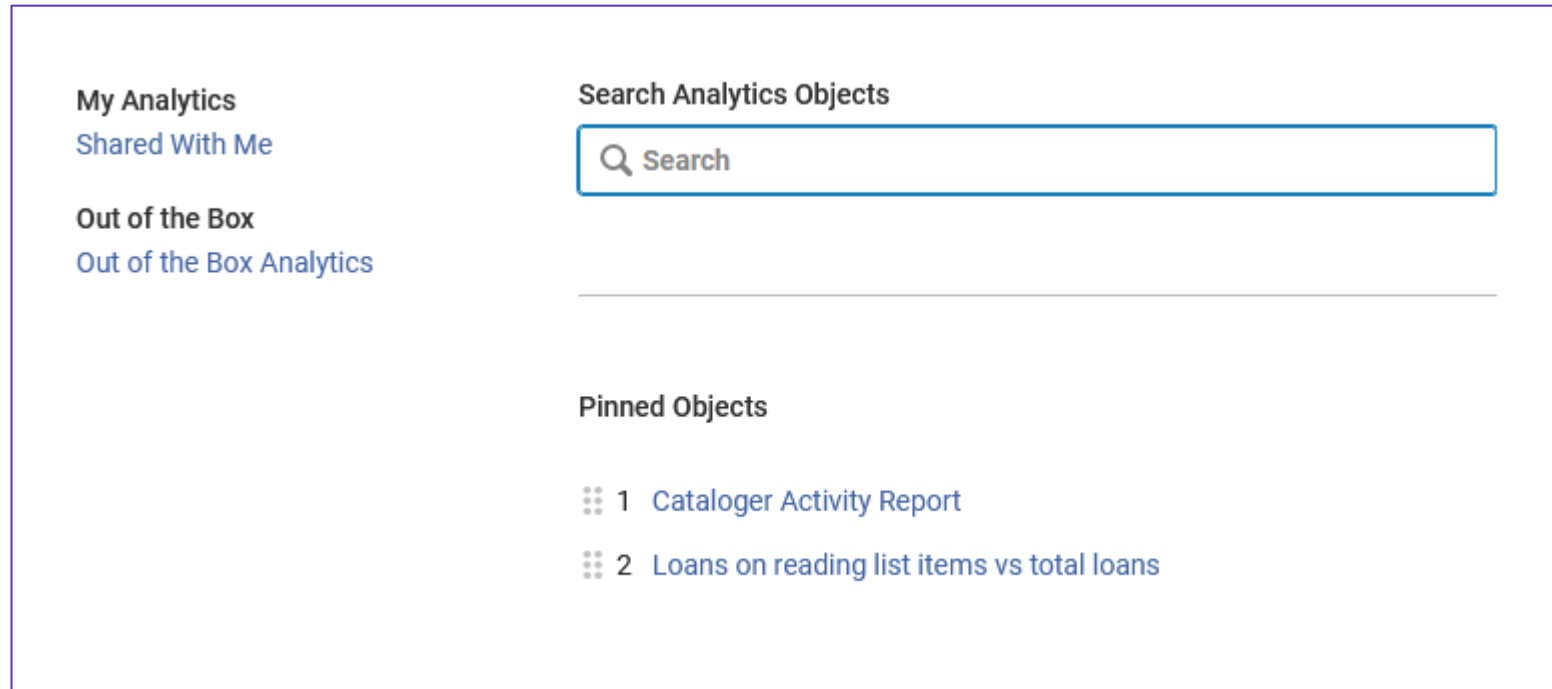
- Here the logged in user (Alicia Chen) **does** have role 'Designs Analytics' and 'Analytics Administrator' and 'General System Administrator'.



The screenshot displays the analytics menu interface. On the left, there are three main sections: 'My Analytics', 'Create Analysis', and 'Out of the Box'. The 'My Analytics' section includes 'Analytics Object List' and 'Shared With Me'. The 'Create Analysis' section includes 'Access Analytics', 'Access Data Visualization', 'Access Analytics (Primo)', and 'Access Data Visualization (Primo)'. The 'Out of the Box' section includes 'Out of the Box Analytics'. On the right, there is a search bar labeled 'Search Analytics Objects' with a search icon and the text 'Search'. Below the search bar, there is a section titled 'Pinned Objects' with two entries: '1 Loans by patron group for current calendar year' and '2 The fulfillment and fines and fees dashboard'.

## 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 screenshot shows the analytics menu interface. On the left, there are three sections: 'My Analytics' with a link 'Shared With Me', 'Out of the Box' with a link 'Out of the Box Analytics', and 'Pinned Objects'. On the right, there is a search bar labeled 'Search Analytics Objects' with a search icon and the text 'Search'. Below the search bar, there is a horizontal line and a section titled 'Pinned Objects' containing two items: '1 Cataloger Activity Report' and '2 Loans on reading list items vs total loans'.



## 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

The screenshot shows a user interface for analytics. On the left, there is a navigation menu with the following items: **My Analytics**, [Analytics Object List](#), [Shared With Me](#), **Create Analysis**, [Access Analytics](#), [Access Data Visualization](#), [Access Analytics \(Primo\)](#), [Access Data Visualization \(Primo\)](#), and **Out of the Box**. Under **Out of the Box**, the entry [Out of the Box Analytics](#) is highlighted with a red rectangular box. On the right side, there is a search bar labeled "Search Analytics Objects" with a magnifying glass icon and the text "Search". Below the search bar, there is a section titled "Pinned Objects" containing two items: "1 Loans by patron group for current calendar year" and "2 The fulfillment and fines and fees dashboard".



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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



# Introduction

## Introduction

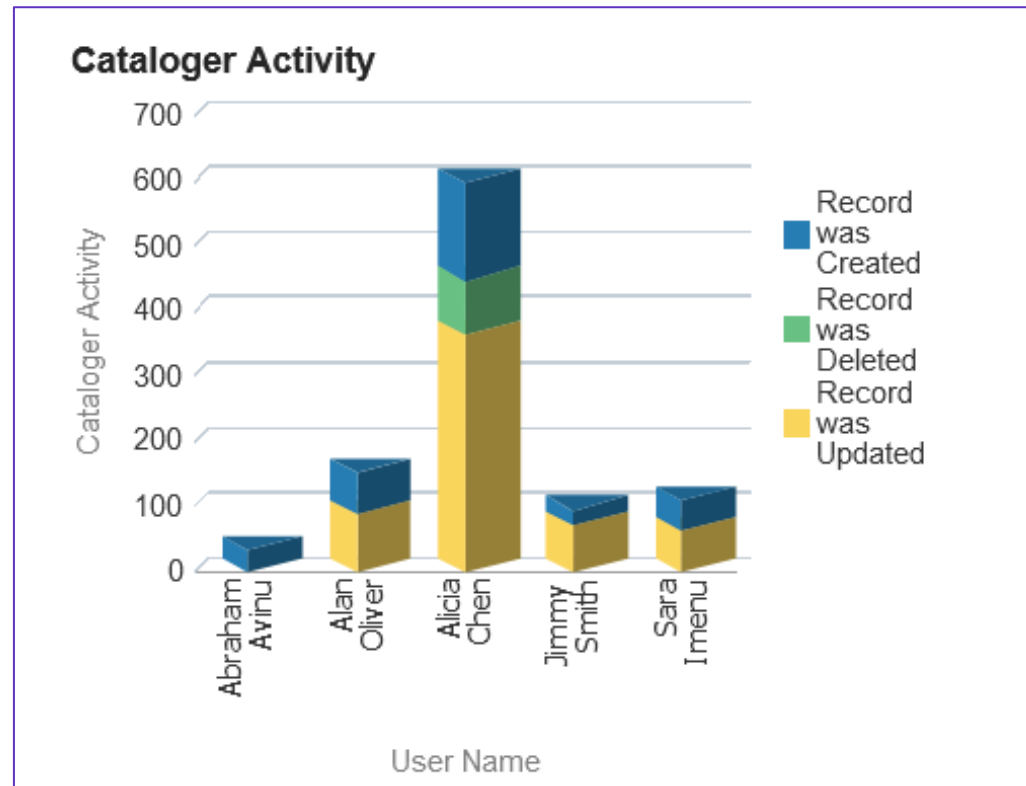
- There may be cases where the library has created a useful chart or graph in Alma analytics and certain librarians will want to add it to their Alma homepage
- This may be done by creating an Analytics object of type Widget
- After the widget is created
  - Each librarian can choose to add the widget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

## Introduction

- In this presentation we will show an 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:



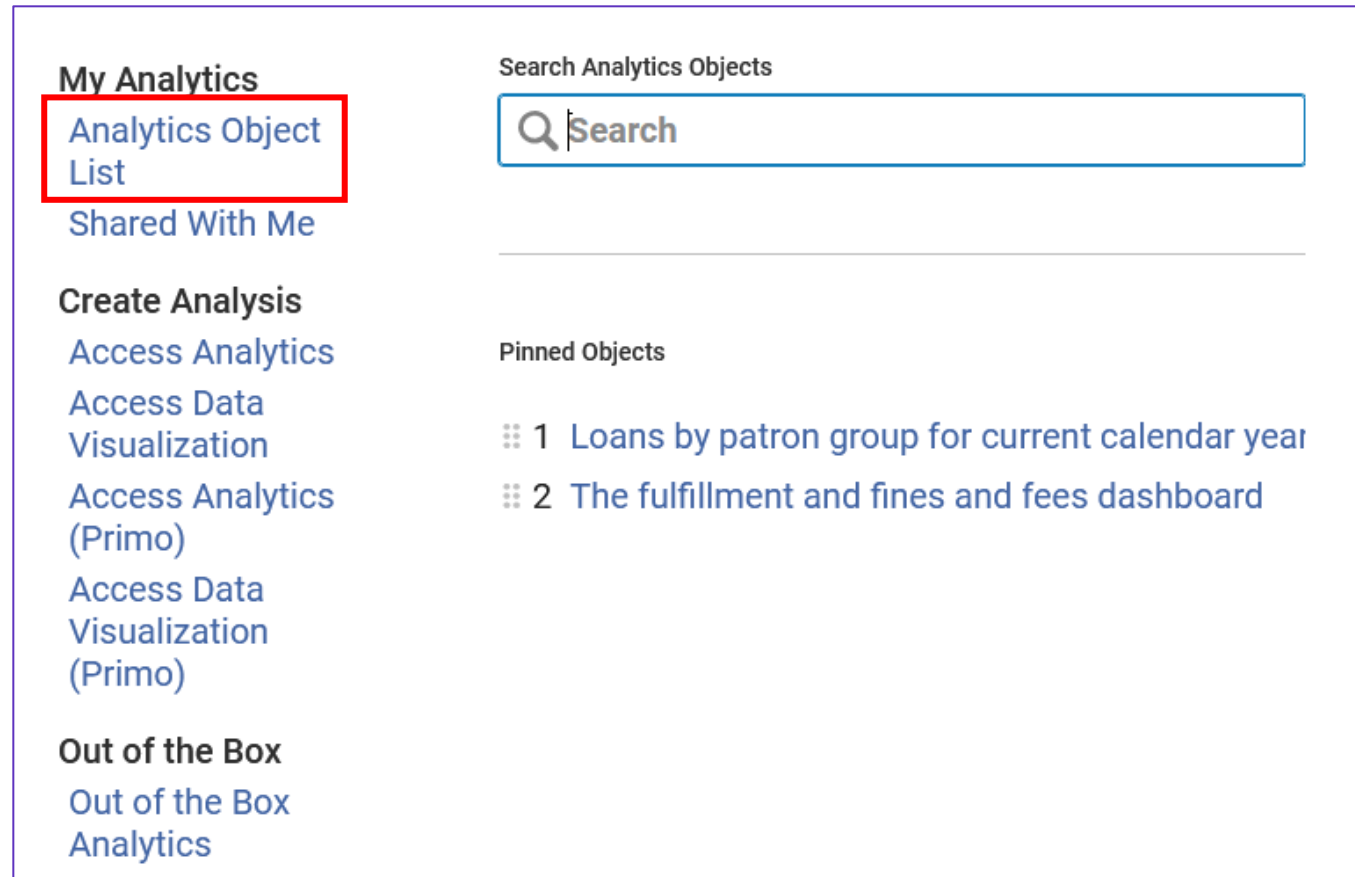




# Creating an analytics object

## Creating an analytics object

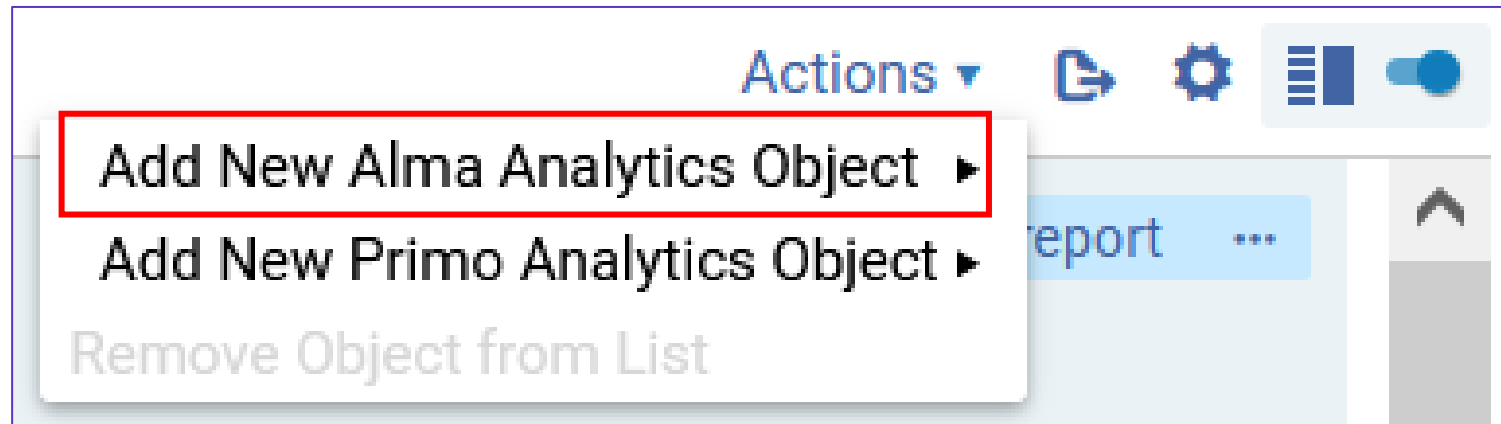
- Select “Analytics > My Analytics > Analytics Objects List”



The screenshot displays the 'My Analytics' dashboard. On the left, a navigation menu is visible with the following items: 'My Analytics', 'Analytics Object List' (highlighted with a red box), 'Shared With Me', 'Create Analysis', 'Access Analytics', 'Access Data Visualization', 'Access Analytics (Primo)', 'Access Data Visualization (Primo)', 'Out of the Box', and 'Out of the Box Analytics'. On the right, there is a search bar labeled 'Search Analytics Objects' with a magnifying glass icon and the text 'Search'. Below the search bar, there is a section titled 'Pinned Objects' containing two items: '1 Loans by patron group for current calendar year' and '2 The fulfillment and fines and fees dashboard'.

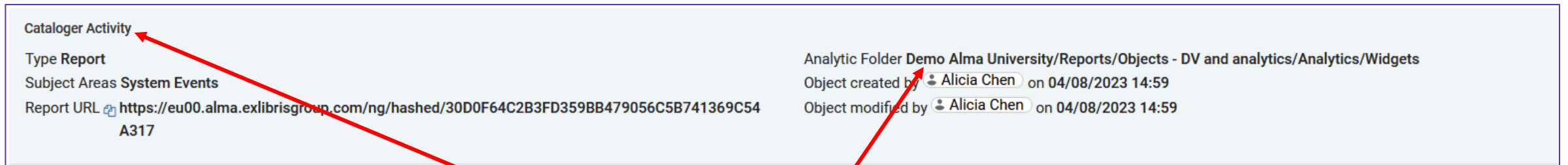
## Creating an analytics object

- 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.



Cataloger Activity

Type Report

Subject Areas System Events

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/30D0F64C2B3FD359BB479056C5B741369C54>  
A317

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets

Object created by Alicia Chen on 04/08/2023 14:59

Object modified by Alicia Chen on 04/08/2023 14:59

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"

The screenshot shows a software interface with several sections. On the left, there are tabs: 'Summary', 'Share', 'Schedule', and 'Report Preview'. The 'Report Preview' tab is highlighted with a red box. To the right of these tabs, there are sections for 'Internal Users' (with a '+ Add Users' button), 'Roles' (with '+ Add Roles' and '+ Add From Profiles' buttons), and a 'Schedule' section with a 'Schedule Report' toggle switch. Below these is the 'Report Preview' section, which contains a 'View full report' link and a checked 'Add as widget' checkbox, both highlighted with red boxes and an arrow. At the bottom of the interface is a bar chart titled 'Cataloger Activity' showing activity for six users: Abraham Avinu, Alan Oliver, Alicia Chen, Jimmy Smith, and Sara Imenu. The chart is a stacked bar chart with a legend indicating three categories: 'Record was Created' (blue), 'Record was Deleted' (green), and 'Record was Updated' (yellow).

User Name	Record was Created	Record was Deleted	Record was Updated
Abraham Avinu	50	0	0
Alan Oliver	100	0	100
Alicia Chen	150	100	250
Jimmy Smith	50	0	50
Sara Imenu	50	0	50

## 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

Summary

Share

Schedule

Report Preview

Share

Internal Users

+ Add Users

Roles

+ Add Roles

+ Add From Profiles

# Creating an analytics object

Share ^

Internal Users

[+ Add Users](#)

Roles

Cataloger x Catalog Administrator x Catalog Manager x Cataloger Extended x

[+ Add From Profiles](#)





# **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 to the Alma Homepage.

User Roles

1 - 2 of 2

Filter: All

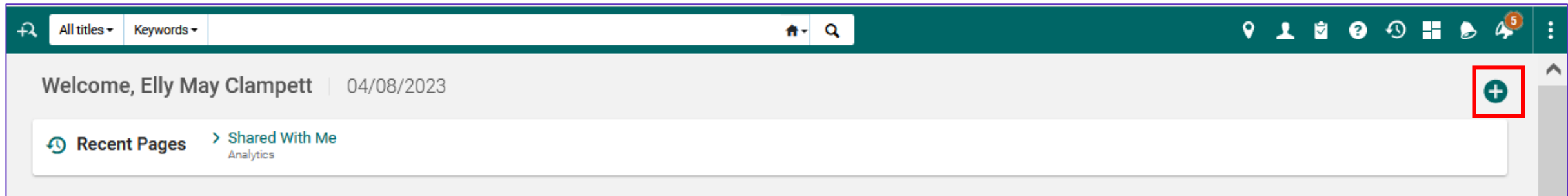
+ Add Role + Add from Profiles - Remove Selected

	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1	<input checked="" type="checkbox"/>	Cataloger	Catalog	Alma University	-	04/08/2023	...
2	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	05/08/2021	...

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

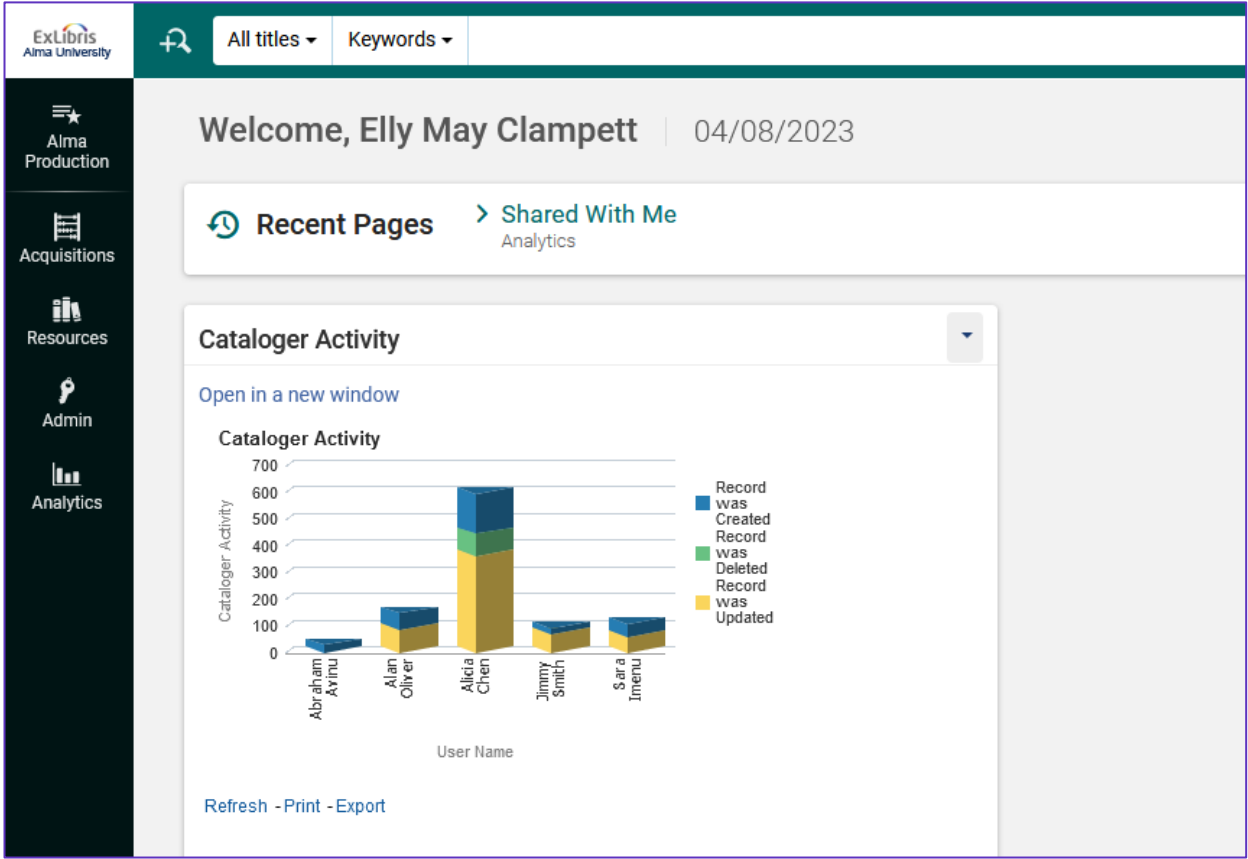
- The “Manage Widgets” screens opens and shows all widgets which have at least one role which the logged in user has.

Select the desired Widget(s)

<input checked="" type="checkbox"/>	Cataloger Activity
<input type="checkbox"/>	Count of Items by Process Type
<input type="checkbox"/>	Item Count by Library - Table
<input type="checkbox"/>	Loan Statistics
<input type="checkbox"/>	Loans and Returns by Patron Group

# Adding the widget to the Alma homepage

- The widget is added to the Alma homepage





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**IGOLU**  
*International Group of Ex Libris Users*

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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





# 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"

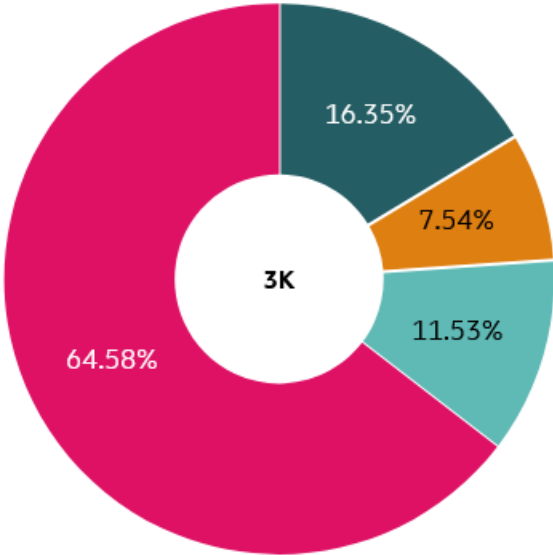
# The sample DV Workbook

## 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

My Folders **Shared Folders**  Sort By **Modified**

Shared Folders > Demo Alma University > Reports > Objects - DV and analytics > **DV**

Type	Name	Description	Owner	Modified
	TR_J1 - Total Item Requests for 2022		HE_2493...	Mar 20, 2023
	TR_J1 - Total Item Requests for 2022 top 10 by platform		HE_2493...	Mar 20, 2023
	<b>Loans by patron group for current calendar year</b>		HE_2493...	Mar 20, 2023



# **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

Welcome, Alicia Chen | 04/08/2023

Recent Pages > Publishing Profiles > Manage Sets

Primo top 10 popular searches in last 12 months

Open in a new window

Search String	Searches
Library Science	76,254
LC Classification	74,651
ירושלים של יומם	74,621
BIBFRAME	70,198
Linked Data	62,541
RDA	49,651
Dewey Decimal	43,716
ספריות	43,709
desktop web applications	31,987

Primo Basic Search Trends Last 12 Months

Open in a new window

Refresh - Print - Export

Item Count by Library - Table

Open in a new window

Library Name	Num of Items
Medical Library	1,613,248
Library of Chinese Studies	1,576,876
Engineering Library	1,487,987
Science Library	1,284,527
Main Library	1,054,746
Art Library	892,087
Music Library	709,253
Law Library	586,788
Education Library	387,619

השאלות לפי קבוצות משתמשים ב 365 ימים האחרונים - פי

Open in a new window

Refresh - Print - Export

Patrons by User Group

Open in a new window

User Group	Num. Users
Administrative Staff	103
Alumni	8
Faculty	473
Graduate Student	1,939
Undergraduate Student	3,442

Refresh - Print - Export

השאלות לפי קבוצות משתמשים ב 365 ימים האחרונים - טבלה

Open in a new window

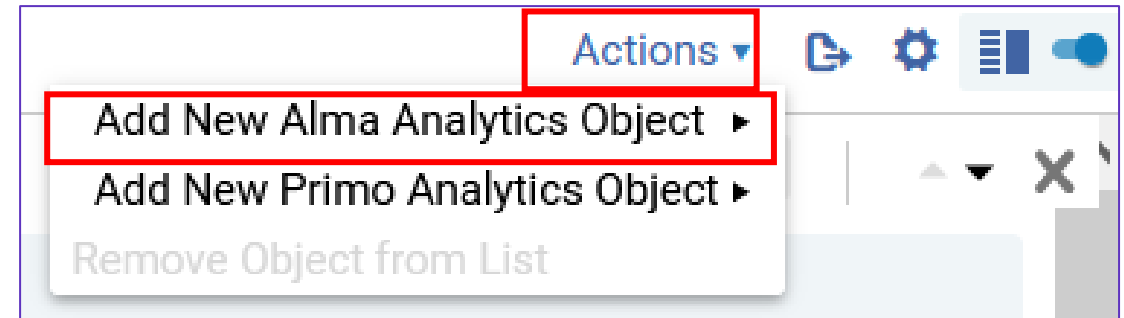
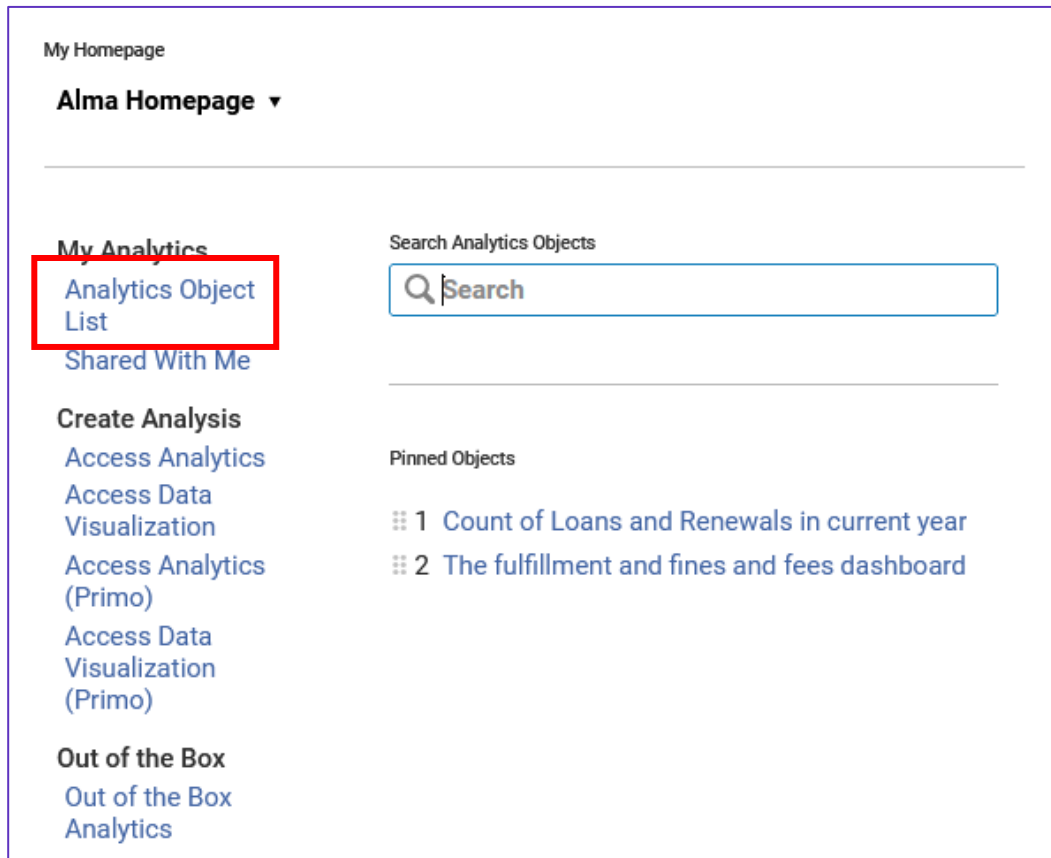
קבוצת משתמש	מס' השאלות
תואר ראשון	1,619
צוות אדמיניסטרטיבי	410
תואר שני	289
סגל אקדמי	189
בוגרים	121

Refresh - Print - Export

## 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


Loans by patron group for current calendar year


Type Data Visualization Workbook

Subject Areas Fulfillment

Report URL  <https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEEC5A6D58215D25B0>

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV

Object created by  
 Alicia Chen  
on 04/08/2023 12:05

Object modified by  
 Alicia Chen  
on 04/08/2023 12:05

## 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

Saved  View full report ...

Loans by patron group for current calendar year

Type Data Visualization Workbook

Subject Areas Fulfillment

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEE5A6D58215D25B0>

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV

Object created by Alicia Chen on 04/08/2023 12:05

Object modified by Alicia Chen on 04/08/2023 12:07

Share

Internal Users

Roles

Take note that this is a Data Visualization Workbook

Schedule

DV objects are sent by email as a link

Schedule Report

"Add as dashboard" is checked

Report Preview

[View full report](#)

Add as dashboard

## 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

The screenshot shows the configuration page for a Data Visualization Workbook. The title is "Loans by patron group for current calendar year". It is a "Type Data Visualization Workbook" with "Subject Areas Fulfillment". The report URL is <https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEE5A6D58215D25B0>. The analytic folder is "Demo Alma University/Reports/Objects - DV and analytics/DV". It was created and modified by Alicia Chen on 04/08/2023 at 12:05 and 12:07 respectively.

Under the "Roles" section, a search box contains "Fulfillment Administrator" and a dropdown menu shows "Fulfillment Administrator x". A red box highlights this role. Below the search box is a "Select a value" input field and an "Add From Profiles" button. A green checkmark icon in a red box is visible at the bottom right of the roles section.

In the "Roles" section we have defined that if a user has role "Fulfillment Administrator" then he or she can make this 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	<input checked="" type="checkbox"/>	Circulation Desk Manager	Fulfillment	Library of Chinese Studies	Default Circulation Desk	06/06/2023	...
2	<input checked="" type="checkbox"/>	Circulation Desk Operator	Fulfillment	Library of Chinese Studies	Default Circulation Desk	06/06/2023	...
3	<input checked="" type="checkbox"/>	Fulfillment Administrator	Fulfillment	Alma University	-	05/03/2023	...
4	<input checked="" type="checkbox"/>	Fulfillment Services Manager	Fulfillment	Alma University	-	05/03/2023	...
5	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Alma University	-	05/03/2023	...
6	<input checked="" type="checkbox"/>	Library Level Analytics consumer	Miscellaneous	Science Library	-	05/03/2023	...
7	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	05/03/2023	...



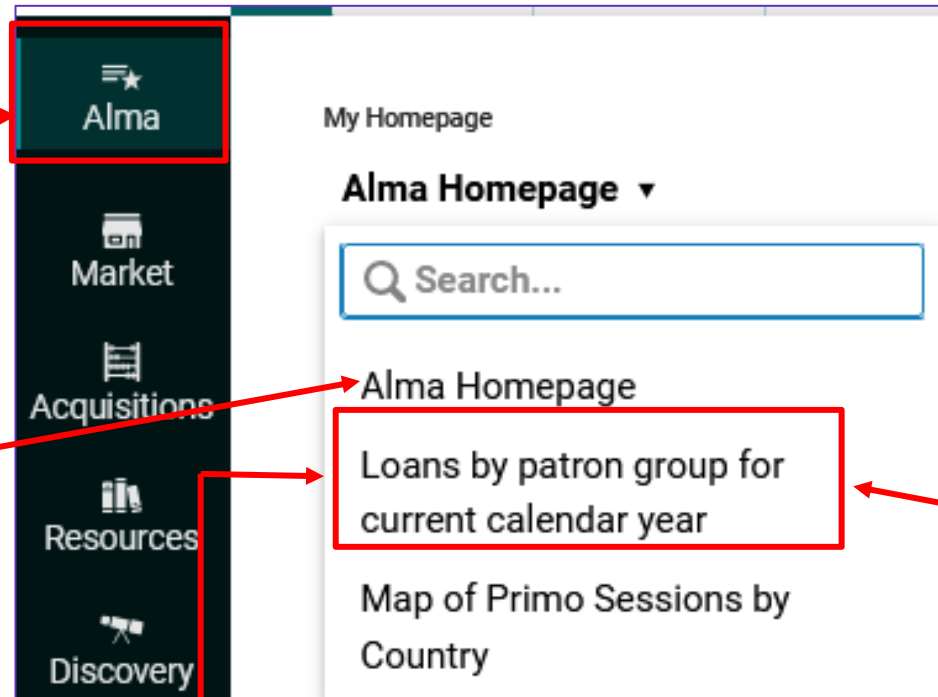
## Configuring the DV Workbook to be the Alma homepage

- 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

The screenshot displays the Alma library system interface. At the top, there is a navigation bar with the ExLibris Alma University logo, search filters for 'All titles' and 'Keywords', and various utility icons. A left-hand sidebar contains navigation options: Alma Production, Acquisitions, Resources, Fulfillment, Admin, Analytics, and Show MDE. The main content area is titled 'User Group (4)' and lists 'Administrative Staff, Faculty, Graduate Stu...'. Below this, the heading 'Loans by patron group for current calendar year' is followed by a table and a donut chart.

**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 donut chart illustrates the distribution of loans across four user groups. The largest segment is Undergraduate Student at 64.58%, followed by Administrative Staff at 16.35%, Graduate Student at 11.53%, and Faculty at 7.54%. The total number of loans is 3K.

Legend: User Group — Administrative Staff — Faculty — Graduate Student — Undergraduate Student

Now the Alma homepage is the DV worksheet

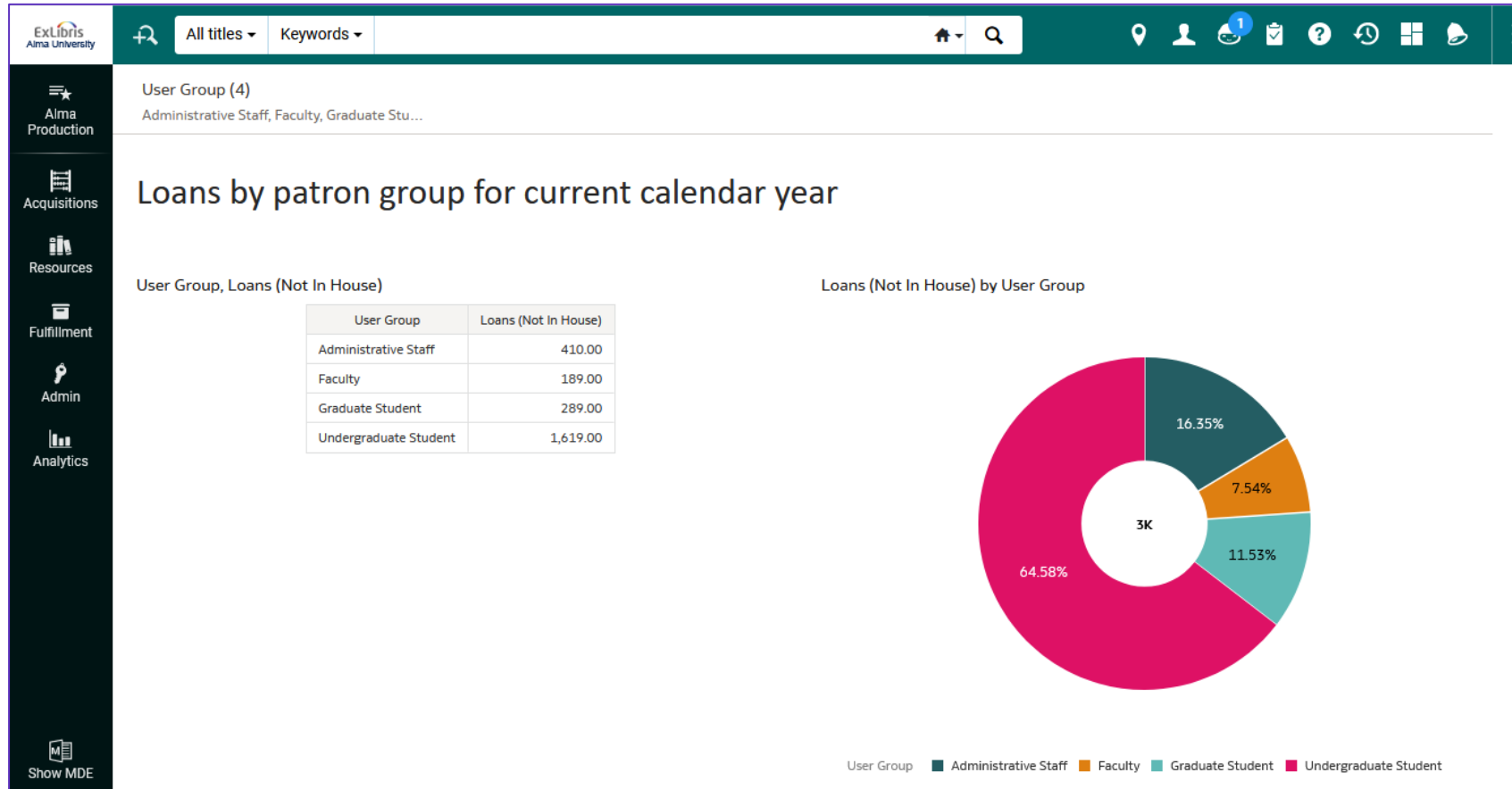
# Configuring the DV Workbook to be the Alma homepage

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

The screenshot shows the Ex Libris Alma University interface. The top navigation bar includes the Ex Libris logo, a search bar with 'Digital titles' and 'Title' filters, and a search term 'taiwan'. The left sidebar contains navigation icons for Alma Production, Market, Acquisitions, Resources, Discovery, and Fulfillment. The main content area displays search results for 'Digital Titles (1 - 15 of 15) taiwan'. Two results are visible, both books by Alicia Chen and Greg Brady, respectively, with details like creation and modification dates. A red arrow points to the Ex Libris logo in the top left corner, and a yellow callout box with the text 'Click here to return to Alma homepage' is positioned over the top left area.

# Configuring the DV Workbook to be the Alma homepage

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





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# The Analytics Objects List

Explanation and Live Demonstration

Yoel Kortick  
Senior Librarian

Introduction

Split View (Side By Side View)

The Menu

Viewing the report from within the object

Multi-Select Facets

Sorting the list of Analytics Objects

Searching the list of Analytics Objects

Presentation Toggle Button





# 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”

The screenshot displays a vertical navigation menu on the left with the following items: Alma Production, Market, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The 'Analytics' item is highlighted with a red box. To the right, the 'My Analytics' section is expanded, showing 'Analytics Object List' (highlighted with a red box), 'Shared With Me', 'Create Analysis' (with sub-items: Access Analytics, Access Data Visualization, Access Analytics (Primo), Access Data Visualization (Primo)), and 'Out of the Box' (with sub-item: Out of the Box Analytics). Further right, there is a search bar labeled 'Search Analytics Objects' with a 'Search' button, and a 'Pinned Objects' section containing two items: '1 Loans by patron group for current calendar year' and '2 The fulfillment and fines and fees dashboard'.



# 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

< Analytics Object List (1 - 20 of 83)

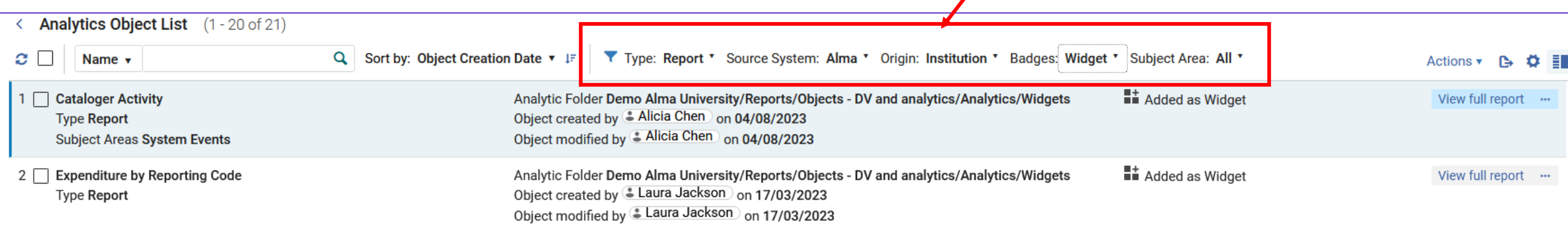
Name   Sort by: Object Creation Date   Type: All  Source System: All  Origin: All  Badges: All  Subject Area: All

<input type="checkbox"/> 1 Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by <input type="button" value="👤"/> Alicia Chen on 04/08/2023 Object modified by <input type="button" value="👤"/> Alicia Chen on 04/08/2023	<input type="button" value="📅"/> Scheduled Report	<input type="button" value="View full report"/> ...
<input type="checkbox"/> 2 Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by <input type="button" value="👤"/> Alicia Chen on 04/08/2023 Object modified by <input type="button" value="👤"/> Alicia Chen on 04/08/2023	<input type="button" value="🧩"/> Added as Widget	<input type="button" value="View full report"/> ...

These are the 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



< Analytics Object List (1 - 20 of 21)

Sort by: Object Creation Date

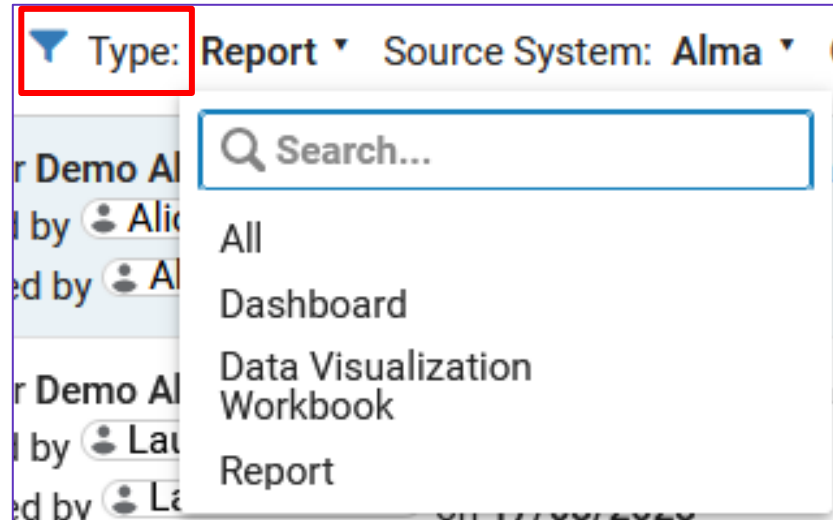
Type: Report Source System: Alma Origin: Institution Badges: **Widget** Subject Area: All

<input type="checkbox"/>	Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Added as Widget	View full report ...
<input type="checkbox"/>	Expenditure by Reporting Code Type Report	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by Laura Jackson on 17/03/2023 Object modified by Laura Jackson on 17/03/2023	Added as Widget	View full report ...



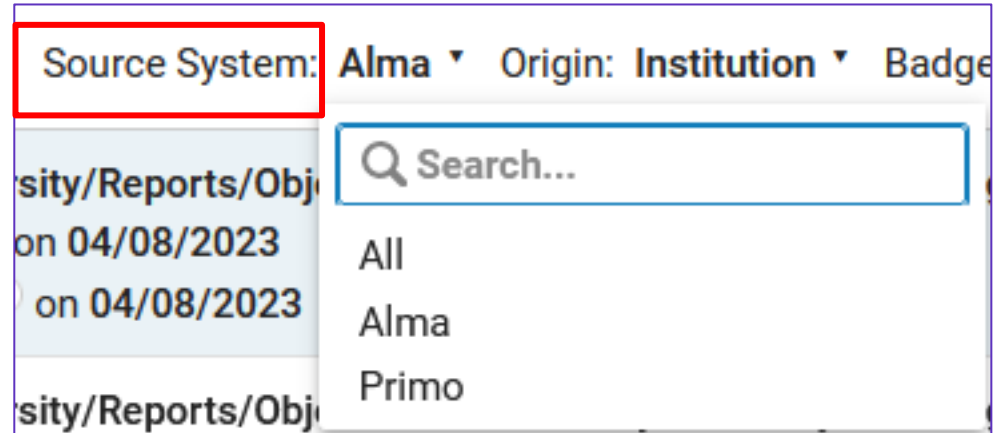
## Multi-Select Facets

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



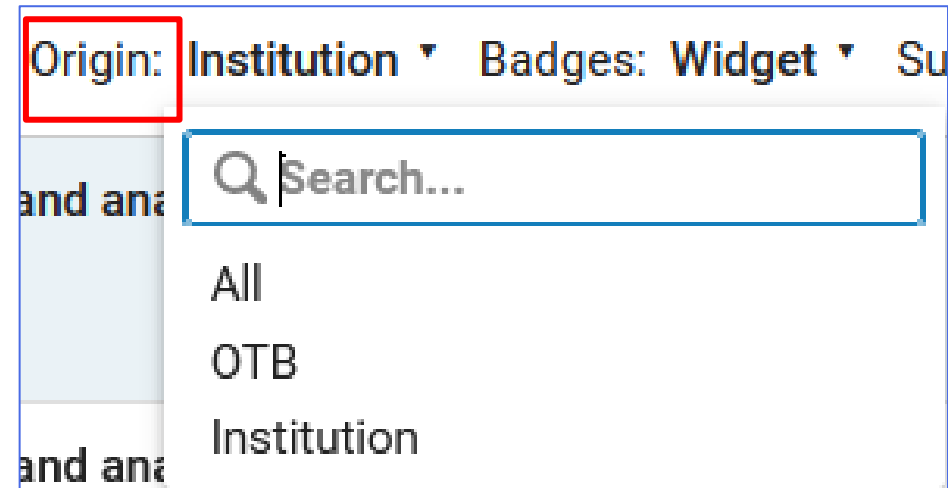
## Multi-Select Facets

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



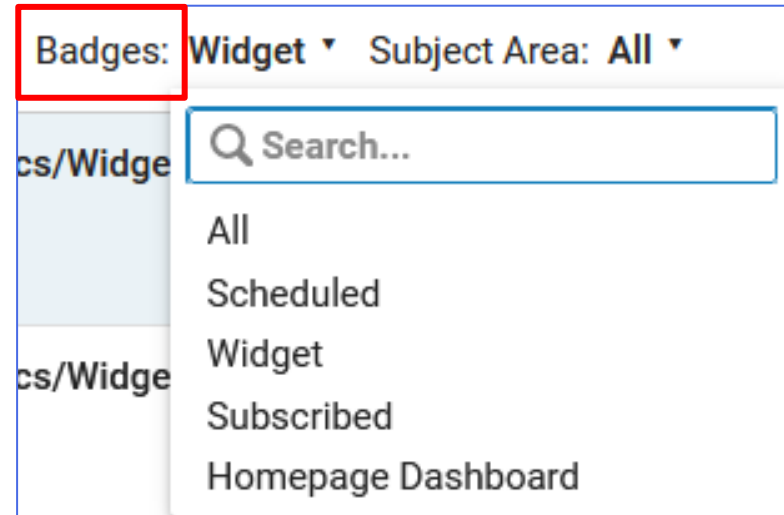
## Multi-Select Facets

- 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)



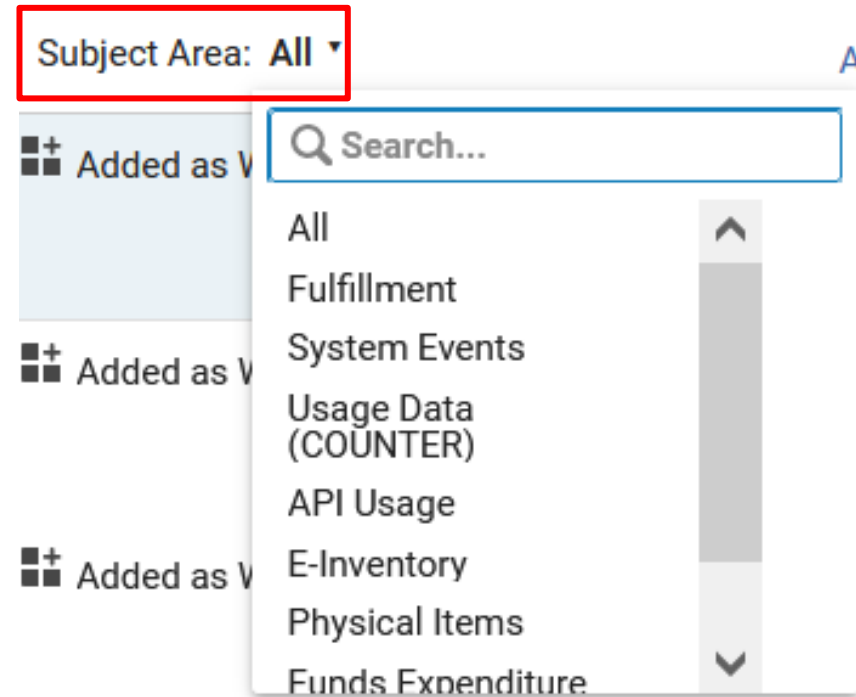
## Multi-Select Facets

- 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

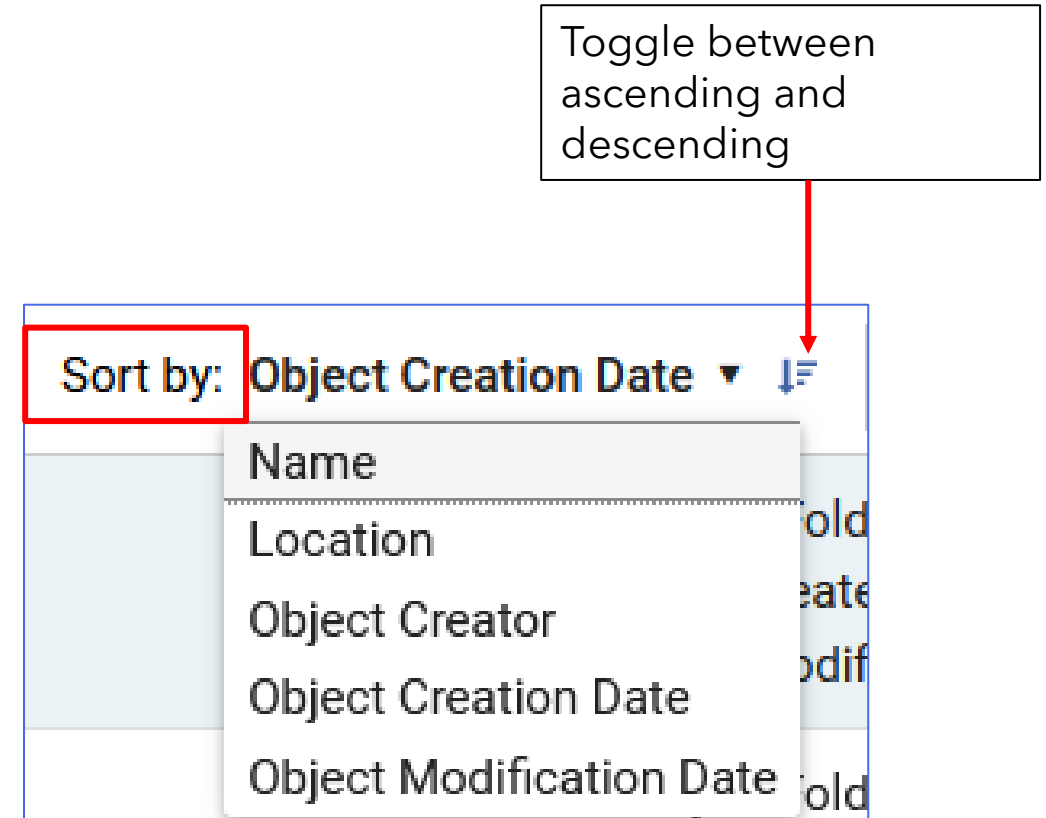




# Sorting the list of Analytics Objects

## 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

< Analytics Object List (1 - 20 of 21)

Sort by: Object Creation Date ▼

Type: Report ▼ Source System: Alma ▼ Origin: Institution ▼ Badges: Widget ▼ Subject Area: All ▼

<input type="checkbox"/>	<b>Cataloger Activity</b> Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Added as Widget View full report ...
<input type="checkbox"/>	<b>Expenditure by Reporting Code</b> Type Report	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analyt Object created by Laura Jackson on 17/03/2023 Object modified by Laura Jackson on 17/03/2023	View full report ...
<input type="checkbox"/>	<b>Patrons by User Group - Pie</b> Type Report Subject Areas Users	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analyt Object created by Super User on 06/07/2022 Object modified by Super User on 17/03/2023	View full report ...
<input type="checkbox"/>	<b>Item Count by Library - Bar Graph</b> Type Report Subject Areas Physical Items	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analyt Object created by Super User on 06/07/2022 Object modified by Super User on 17/03/2023	View full report ...
<input type="checkbox"/>	<b>Physical Inventory Count - by Material Type</b> Type Report	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analyt Object created by Anna Allen on 25/04/2022 Object modified by Anna Allen on 17/03/2023	View full report ...

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

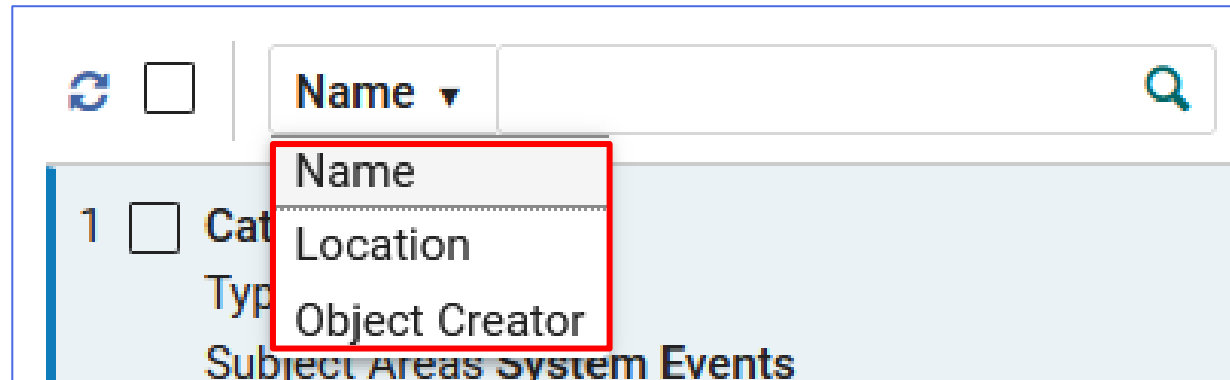




# Searching the list of Analytics Objects

## 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.

The screenshot displays the 'Analytics Object List' interface. At the top, the search bar is set to 'Location' with the value 'Analytics/Widgets'. The results are sorted by 'Object Creation Date'. Two results are visible:

Object ID	Object Name	Type	Created By	Created On	Modified By	Modified On	Actions
1	Cataloger Activity	Type Report	Alicia Chen	04/08/2023	Alicia Chen	04/08/2023	Added as Widget, View full report
2	Expenditure by Reporting Code	Type Report	Laura Jackson	17/03/2023	Laura Jackson	17/03/2023	Added as Widget, View full report






Red arrows in the original image point to the search bar, the search results, and the 'Added as Widget' button.

# 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

< Analytics Object List (1 - 20 of 45)

Location  Sort by: Object Creation Date Type: Report Source System: Alma Origin: Institution Badges: All Subject Area: All Actions

<input type="checkbox"/> 1 Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 22/08/2023	 Subscribed  Scheduled Report	<a href="#">View full report</a> ...
<input type="checkbox"/> 2 Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	 Added as Widget	<a href="#">View full report</a> ...
<input type="checkbox"/> 3 Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023	 Scheduled Report	<a href="#">View full report</a> ...
<input type="checkbox"/> 4 Outstanding Loans filtered by loan and due date and expiry date Type Report	Analytic Folder Demo Alma University/Reports/Fulfillment Object created by Bettina Schmid on 18/06/2023	 Pinned Object	<a href="#">View full report</a> ...



# 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.

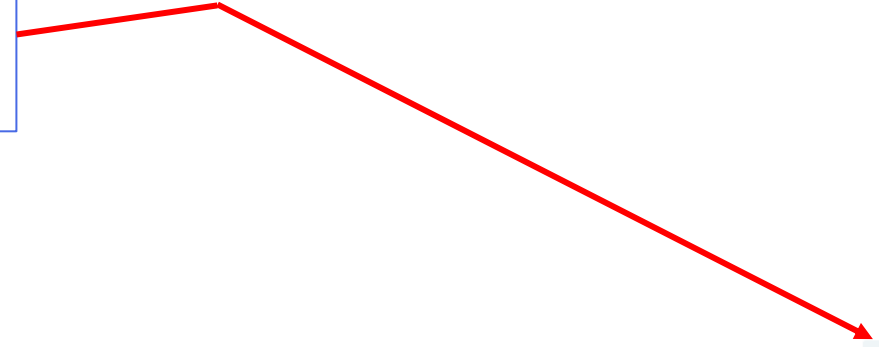
## Presentation Toggle Button

- 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"



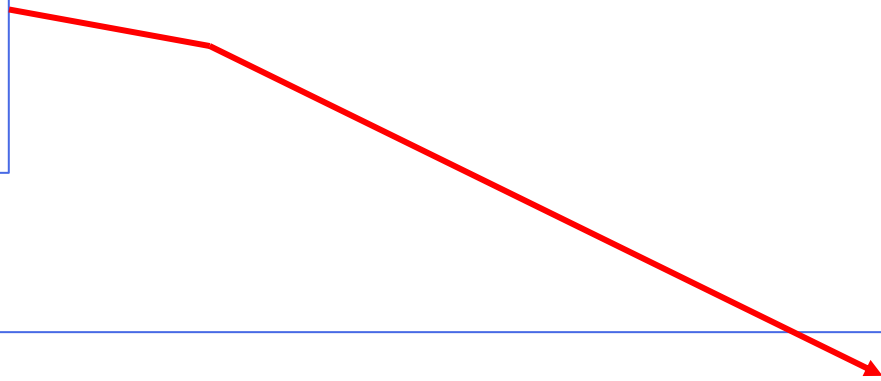
< Analytics Object List (1 - 20 of 83)

<input type="checkbox"/>	Name	Sort by: Object Creation Date	Type: All	Source System: All	Origin: All	Badges: All	Subject Area: All	Actions
<input type="checkbox"/>	<b>Expenditure by vendor</b> Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports <b>Objects</b> Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 22/08/2023	Subscribed Scheduled Report	View full rep	Enable split screen			
<input type="checkbox"/>	<b>Cataloger Activity</b> Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Added as Widget	View full report	...			



# Presentation Toggle Button

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



< Analytics Object List (1 - 20 of 45)

Location [ ] Sort by: Object Creation Date [v] Type: Report [v] Source System: Alma [v] Origin: Institution [v] Badges: All [v] Subject Area: All [v] Actions [v] [ ] [ ] [ ] [ ]

<input type="checkbox"/> Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 22/08/2023	Subscribed Scheduled Report	View full report ...
<input type="checkbox"/> Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Added as Widget	View full report ...
<input type="checkbox"/> Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023	Scheduled Report	View full report ...

Saved [v] View full report Remove Object ... Pin to Analytics ... Disable split screen

Summary  
Share  
Schedule  
Report Preview

Expenditure by vendor  
Type Report  
Subject Areas Funds Expenditure  
Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/EAE4D98235F484132FCCEA9B1FFFC6F146BCD39>  
Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects  
Object created by Alicia Chen on 04/08/2023 18:24  
Object modified by Alicia Chen on 22/08/2023 13:48

Share  
Internal Users

# Presentation Toggle Button

- This is the split view

Analytics Object List (1 - 20 of 45)

Location [ ] Sort by: Object Creation Date [v] Type: Report Source System: Alma Origin: Institution

Object ID	Object Name	Object Path	Object Type	Object Status	Object Actions
1	Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports/Objects	Subscribed Scheduled Report	View full report ...	
2	Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets	Added as Widget	View full report ...	
3	Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports/Objects	Scheduled Report	View full report ...	
4	Outstanding Loans filtered by loan and due date and expiry date Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Fulfillment	Pinned Object	View full report ...	

Summary  
Share  
Schedule  
Report Preview

Expenditure by vendor  
Type Report  
Subject Areas Funds Expenditure  
Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/EAE4D98235F484132FCCEA9B1FFFC6F146BCD39>  
Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports/Objects  
Object created by Alicia Chen on 04/08/2023 18:24  
Object modified by Alicia Chen on 07/08/2023 13:48

Share  
Internal Users  
+ Add Users  
Roles  
+ Add Roles

Disable split screen

# Presentation Toggle Button

- This is the split view

**Analytics Object List** (1 - 20 of 45)

Location  Sort by: Object Creation Date Type: Report Source System: Alma Origin: Institution Badges: All Subject Area: All

Object ID	Object Name	Type	Subject Areas	Folder Path	Created/Modified	Actions
1	Expenditure by vendor	Report	Funds Expenditure	Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports/Objects	Created: Alicia Chen (04/08/2023) Modified: Alicia Chen (22/08/2023)	Subscribed, Scheduled Report, View full report
2	Cataloger Activity	Report	System Events	Demo Alma University/Reports/Objects - DV and analytics/Analytics/Wid	Created: Alicia Chen (04/08/2023) Modified: Alicia Chen (04/08/2023)	Added as Widget, View full report
3	Count of Loans and Renewals in current year	Report	Fulfillment	Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports/Objects	Created: Alicia Chen (04/08/2023) Modified: Alicia Chen (07/08/2023)	Scheduled Report, View full report
4	Outstanding Loans filtered by loan and due date and expiry date	Report	Fulfillment	Demo Alma University/Reports/Fulfillment	Created: Bettina Schmid (18/06/2023)	Pinned Object, View full report

**Summary**

**Expenditure by vendor**

Type Report

Subject Areas Funds Expenditure

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/EAE4D98235F484132FCCEA9B1FFFC6F146BCD39>

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports/Objects

Object created by Alicia Chen on 04/08/2023 18:24

Object modified by Alicia Chen on 22/08/2023 13:48

Share

Internal Users

+ Add Users

Roles

+ Add Roles

Switch to full view

Disable split screen

# Presentation Toggle Button



Clicking here will collapse the left pane thus showing the object in "Full Page view". We will now click

The screenshot shows the 'Analytics Object List' interface. At the top, there's a search bar with 'Location' and a 'Sort by: Object Creation Date' dropdown. Below this is a table of objects. The first object is 'Expenditure by vendor', which is selected. To its right, there's a 'Summary' pane showing details like 'Type Report', 'Subject Areas Funds Expenditure', and 'Report URL'. A red arrow points from the callout box to a circular toggle button on the left side of the interface, which is currently in the 'off' position. The interface also includes various action buttons like 'View full report', 'Share', and 'Schedule'.

Object ID	Object Name	Type	Created By	Created On	Modified By	Modified On	Actions
1	Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Reports Objects	Alicia Chen	04/08/2023	Alicia Chen	22/08/2023	View full report ...
2	Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Widgets	Alicia Chen	04/08/2023	Alicia Chen	04/08/2023	View full report ...
3	Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Reports Objects	Alicia Chen	04/08/2023	Alicia Chen	07/08/2023	View full report ...
4	Outstanding Loans filtered by loan and due date and expiry date Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports /Fulfillment	Bettina Schmid	18/06/2023			View full report ...

# Presentation Toggle Button


Saved 

[View full report](#) [Remove Object ...](#) [Pin to Analytics ...](#)  


Expenditure by vendor


Type Report

Subject Areas Funds Expenditure

Report URL  <https://eu00.alma.exlibrisgroup.com/ng/hashed/EAE4D98235F484132FCCEA9B1FFFCD6F146B>  
CD39

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects

Object created by  Alicia Chen on 04/08/2023 18:24

Object modified by  Alicia Chen on 22/08/2023 13:48

Share

Internal Users

 [Add Users](#)


Roles

 [Add Roles](#)

 [Add From Profiles](#)

Now we are in  
"Full Page view"

Schedule

 [Schedule Report](#)

Recurrence Pattern Weekly

Every Monday At 09:00

Delivery option Attachment  
Format Excel

FTP

FTP Configuration Ex Libris Secure FTP Service  
Sub-directory expenditures

# Presentation Toggle Button

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

The screenshot displays the configuration page for a report titled "Expenditure by vendor". The interface includes a left-hand navigation menu with options: Summary, Share, Schedule, and Report Preview. The main content area shows report details such as "Type Report", "Subject Areas Funds Expenditure", and "Report URL". A yellow callout box with the text "Return to split view" has a red arrow pointing to a small, semi-circular button with a right-pointing arrow icon located on the left side of the interface, below the "Roles" section.

Summary

Share

Schedule

Report Preview

Saved

View full report Remove Object ... Pin to Analytics ...

Expenditure by vendor

Type Report Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects

Subject Areas Funds Expenditure Object created by Alicia Chen on 04/08/2023 18:24

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/EAE4D98235F484132FCCEA9B1FFFC6D6F146B> Object modified by Alicia Chen on 22/08/2023 13:48

CD39

Share

Internal Users

+ Add Users

Roles

+ Add Roles

+ Add From Profiles

Schedule

Schedule Report

Recurrence Pattern Weekly Every Monday At 09:00

Delivery option Attachment  FTP

Format Excel FTP Configuration Ex Libris Secure FTP Service

Sub-directory expenditures

Return to split view

# Presentation Toggle Button

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

The screenshot displays the 'Analytics Object List' interface. At the top, there are filters for Location, Sort by (Object Creation Date), Type (Report), Source System (Alma), Origin (Institution), Badges (All), and Subject Area (All). The main area shows a list of four reports:

Report ID	Report Name	Type	Subject Areas	Created/Modified	Actions
1	Expenditure by vendor	Type Report	Funds Expenditure	Created by Alicia Chen on 04/08/2023, Modified by Alicia Chen on 22/08/2023	View full report, ...
2	Cataloger Activity	Type Report	System Events	Created by Alicia Chen on 04/08/2023, Modified by Alicia Chen on 04/08/2023	View full report, ...
3	Count of Loans and Renewals in current year	Type Report	Fulfillment	Created by Alicia Chen on 04/08/2023, Modified by Alicia Chen on 07/08/2023	View full report
4	Outstanding Loans filtered by loan and due date and expiry date	Type Report	Fulfillment	Created by Bettina Schmid on 18/06/2023, Modified by Bettina Schmid	View full report

The right pane shows a detailed view of the 'Expenditure by vendor' report. It includes a 'Summary' section with the report URL: <https://eu00.alma.exlibrisgroup.com/ng/hash/d/EAE4D98235F484132FCCEA9B1FFFC6F146BCD39>. Below this is a 'Share' section with options to 'Add Users', 'Add Roles', and 'Add From Profiles'. A yellow callout box with the text 'Close right pane. We will click the X to close the right pane.' points to the 'X' button in the top right corner of the right pane.
















# Presentation Toggle Button

- Now we are back at list view

< Analytics Object List (1 - 20 of 45)

Location  Sort by: Object Creation Date  Type: Report  Source System: Alma  Origin: Institution  Badges: All  Subject Area: All  Actions

<input type="checkbox"/> Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by  Alicia Chen on 04/08/2023 Object modified by  Alicia Chen on 22/08/2023	 Subscribed  Scheduled Report	<a href="#">View full report</a> ...
<input type="checkbox"/> Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by  Alicia Chen on 04/08/2023 Object modified by  Alicia Chen on 04/08/2023	 Added as Widget	<a href="#">View full report</a> ...
<input type="checkbox"/> Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by  Alicia Chen on 04/08/2023 Object modified by  Alicia Chen on 07/08/2023	 Scheduled Report	<a href="#">View full report</a> ...
<input type="checkbox"/> Outstanding Loans filtered by loan and due date and expiry date Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Fulfillment Object created by  Bettina Schmid on 18/06/2023 Object modified by  Bettina Schmid on 18/06/2023	 Pinned Object	<a href="#">View full report</a> ...





## **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)

< Analytics Object List (1 - 20 of 45)

Location [ ] Sort by: Object Creation Date [v] Type: Report [v] Source System: Alma [v] Origin: Institution [v] Badges: All [v] Subject Area: All [v] Actions [v]

<input type="checkbox"/> Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 22/08/2023	Subscribed Scheduled Report	View full report ...
<input type="checkbox"/> Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Added as Widget	View full report ...
<input type="checkbox"/> Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports /Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023	Scheduled Report	View full report ...
<input type="checkbox"/> Outstanding Loans filtered by loan and due date and expiry date Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports /Fulfillment Object created by Bettina Schmid on 18/06/2023 Object modified by Bettina Schmid on 18/06/2023	Pinned Object	View full report ...

Summary  
Share  
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/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7  
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

Share  
Internal Users  
Add User  
Roles  
Fulfillment Administrator Fulfillment Services Manager

Editable Analytics Object details will open in the **Right side panel**

Select an Analytics Object from the **Compact left side record view**

# Split View (Side By Side View)

< Analytics Object List (1 - 20 of 45)

Location  Sort by: Object Creation Date  Type: Report Source System: Alma Origin: Institution Badges: All Subject Area: All Actions

<input type="checkbox"/> Expenditure by vendor Type Report Subject Areas Funds Expenditure	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 22/08/2023	Subscribed Scheduled Report View full report ...	
<input type="checkbox"/> Cataloger Activity Type Report Subject Areas System Events	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Added as Widget View full report ...	
<input type="checkbox"/> Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023	Scheduled Report View full report ...	<b>Summary</b> Share Schedule Report Preview
<input type="checkbox"/> Outstanding Loans filtered by loan and due date and expiry date Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Fulfillment Object created by Bettina Schmid on 18/06/2023 Object modified by Bettina Schmid on 18/06/2023	<b>Pin</b>	<b>Count of Loans and Renewals in current year</b> Type Report Subject Areas Fulfillment Description This provides a Count of Loans and Renewals in current year Report URL <a href="https://eu00.alma.exlibrisgroup.com/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7FA7E66A35">https://eu00.alma.exlibrisgroup.com/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7FA7E66A35</a> 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

Share Internal Users Add Users Roles Fulfillment Administrator Fulfillment Services Manager

Navigate directly to the different parts of the Analytics Object using the "Sections" option or the scrollbar.

# Split View (Side By Side View)

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

**Analytics Object List** (1 - 20 of 45)

Location [ ] Sort by: Object Creation Date [ ] Type: Report Source System: Alma Origin: Institution Badges: All Subject Area: All

Object ID	Object Name	Subject Areas	Object Type	Creation/Modification	Actions
1	Expenditure by vendor	Funds Expenditure	Report	Created: 04/08/2023, Modified: 22/08/2023	View full report
2	Cataloger Activity	System Events	Report	Created: 04/08/2023, Modified: 04/08/2023	View full report
3	Count of Loans and Renewals in current year	Fulfillment	Report	Created: 04/08/2023, Modified: 07/08/2023	View full report
4	Outstanding Loans filtered by loan and due date and expiry date	Fulfillment	Report	Created: 18/06/2023, Modified: 18/06/2023	View full report
5	Physical Item Usage for Weeding				View full report

**Edit Report Modal:**

- Analytic Folder: Demo Alma University/Re...
- Report Name: Count of Loans and Renew...
- Display Name: Count of Loans and Rene ...
- Copy button
- This provides a Count of ...
- Object Creator: Alicia Chen
- Object Creation Date: 04/08/2023 12:44
- Object Modification Date: 07/08/2023 10:48
- Buttons: Reset, Save

**Callout:** Edit the Analytics Object as desired



**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.

Report Preview

View full report

Preview

The screenshot displays the 'Analytics Object List' interface. On the left, a list of reports is shown, with the 'Loans in current year' report selected. The main panel on the right shows the details for this report, including a 'Report Preview' section and a 'View full report' button. A table of loan data is visible at the bottom of the report preview.

Loans (Not In House)	MMS Id	Title
9	99490287700121	החורף בלונדון /
9	991483930000121	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	991182310000121	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 /



## 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 /



# 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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International Group of Ex Libris Users

# The Pinned Objects and the Report URL

Explanation and Live Demonstration

Yoel Kortick  
Senior Librarian

[Introduction](#)

[Pinned Objects](#)

[Report URLs](#)



# 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)

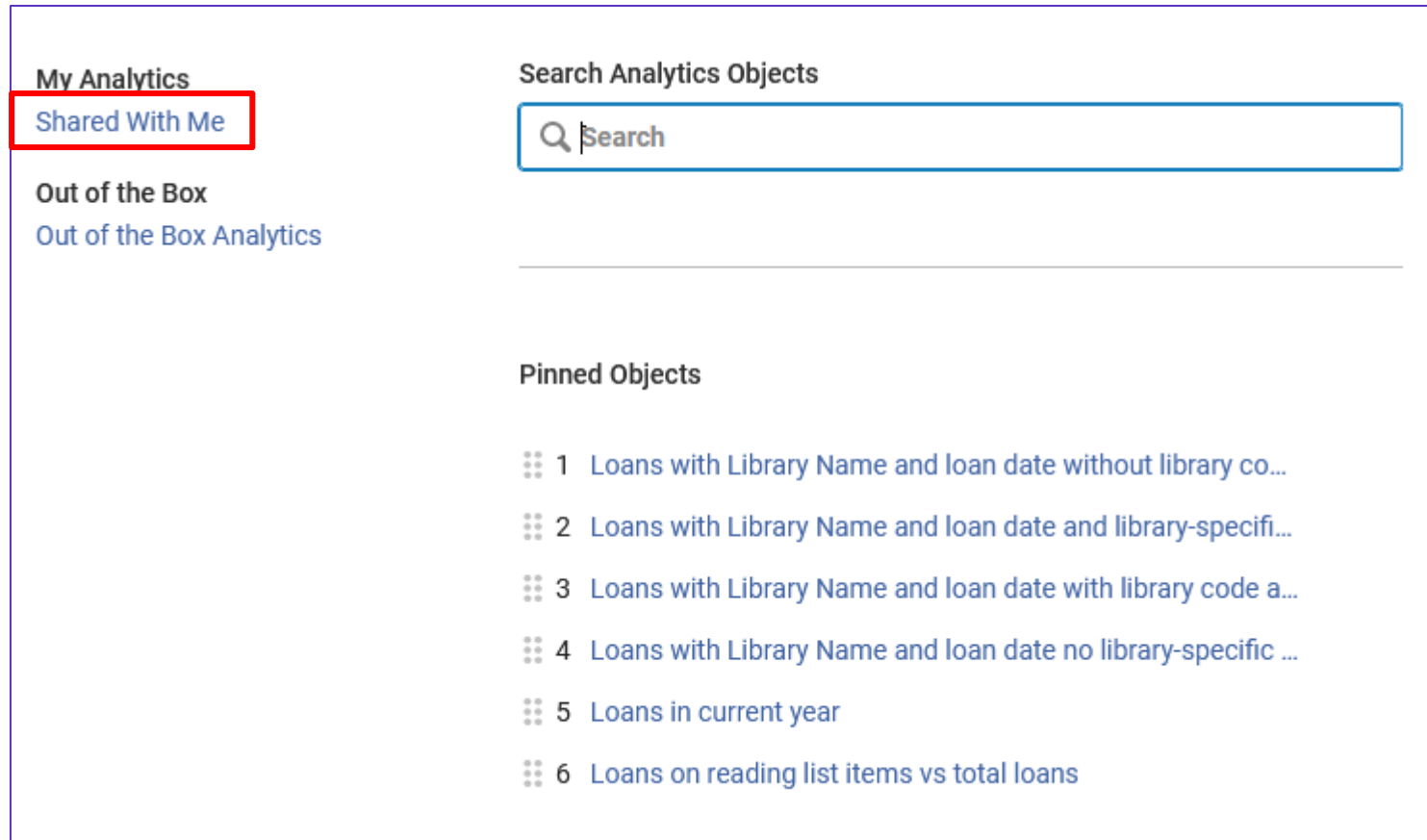


# Pinned Objects



## 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.



The screenshot displays the 'My Analytics' section of the Ex Libris interface. The 'Shared With Me' link is highlighted with a red border. Below it, the 'Out of the Box' section is visible. To the right, there is a search bar for 'Search Analytics Objects' and a list of 'Pinned Objects'.

**My Analytics**

- Shared With Me**
- Out of the Box
- Out of the Box Analytics

**Search Analytics Objects**

---

**Pinned Objects**

- 1 Loans with Library Name and loan date without library co...
- 2 Loans with Library Name and loan date and library-specifi...
- 3 Loans with Library Name and loan date with library code a...
- 4 Loans with Library Name and loan date no library-specific ...
- 5 Loans in current year
- 6 Loans on reading list items vs total loans

# 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	<input checked="" type="checkbox"/>	Circulation Desk Manager	Fulfillment	Library of Chinese Studies	Default Circulation Desk	06/06/2023	...
2	<input checked="" type="checkbox"/>	Circulation Desk Operator	Fulfillment	Library of Chinese Studies	Default Circulation Desk	06/06/2023	...
3	<input checked="" type="checkbox"/>	Fulfillment Administrator	Fulfillment	Alma University	-	05/03/2023	...
4	<input checked="" type="checkbox"/>	Fulfillment Services Manager	Fulfillment	Alma University	-	05/03/2023	...
5	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Alma University	-	05/03/2023	...
6	<input checked="" type="checkbox"/>	Library Level Analytics consumer	Miscellaneous	Science Library	-	05/03/2023	...
7	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	05/03/2023	...

ma.exlibrisgroup.com/ng/ng/#idCollapseTagLXP\_113

# 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.

< Shared With Me (1 - 20 of 24)

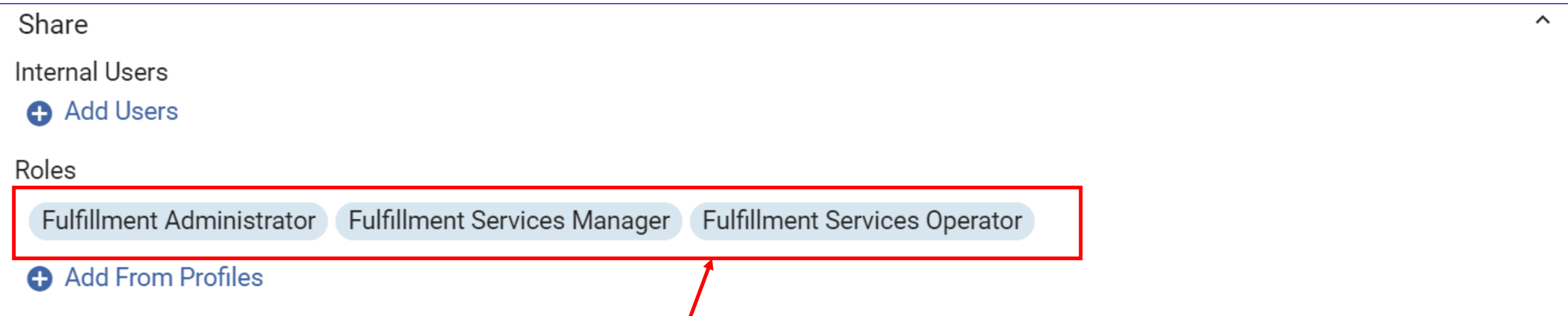
Search: Name [ ] Sort by: Object Creation Date [ ] Type: All [ ] Source System: All [ ] Badges: All [ ] Subject Area: All [ ]

1	Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023	Scheduled Report	Pin to Analytics Menu
2	Loans by patron group for current calendar year Type Data Visualization Workbook Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023		Pin to Analytics Menu
3	Fulfillment Dashboard Type Dashboard	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023		Pin to Analytics Menu
4	Loans on reading list items vs total loans Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Fulfillment Object created by Bettina Schmid on 16/06/2023 Object modified by Bettina Schmid on 16/06/2023	Pinned Object	Unpin From Analytics M...

For example, let's look at "Count of Loans and Renewals in current year"

## 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.



The screenshot shows a user interface for sharing objects. It has a 'Share' section with an upward arrow, followed by 'Internal Users' and a '+ Add Users' button. Below that is the 'Roles' section, which contains three role buttons: 'Fulfillment Administrator', 'Fulfillment Services Manager', and 'Fulfillment Services Operator'. These three buttons are enclosed in a red rectangular box. Below the box is a '+ Add From Profiles' button. A red arrow points from the bottom of the red box to a text box below.

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”

< Shared With Me (1 - 20 of 24)

Refresh Name Search Sort by: Object Creation Date Type: All Source System: All Badges: All Subject Area: All

1	Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 07/08/2023	Scheduled Report	Pin to Analytics Menu
2	Loans by patron group for current calendar year Type Data Visualization Workbook Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023		Pin to Analytics Menu

# Pinned Objects

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

The screenshot displays a user interface for managing shared objects. At the top, there is a navigation bar with a back arrow, the text 'Shared With Me (1 - 20 of 24)', and a search input field. Below this is a filter bar with options for 'Sort by: Object Creation Date', 'Type: All', 'Source System: All', 'Badges: All', and 'Subject Area: All'. The main content area shows a list of objects. The first object is 'Count of Loans and Renewals in current year', which is a 'Report' type. It has a 'Pinned Object' badge (a purple pin icon) and a button labeled 'Unpin From Analytics M...'. The second object is 'Loans by patron group for current calendar year', which is a 'Data Visualization Workbook' type. It has a button labeled 'Pin to Analytics Menu'. Red arrows point from the text in the bullet point above to the 'Pinned Object' badge and the 'Unpin From Analytics M...' button.

Object ID	Name	Type	Subject Areas	Folder	Created By	Created On	Modified By	Modified On	Badges	Actions
1	Count of Loans and Renewals in current year	Report	Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects	Alicia Chen	04/08/2023	Alicia Chen	07/08/2023	Scheduled Report, Pinned Object	Unpin From Analytics M...
2	Loans by patron group for current calendar year	Data Visualization Workbook	Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV	Alicia Chen	04/08/2023	Alicia Chen	04/08/2023		Pin to Analytics Menu

# Pinned Objects

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

The screenshot displays the 'My Analytics' dashboard. On the left, there are sections for 'Shared With Me' and 'Out of the Box Analytics'. On the right, there is a 'Search Analytics Objects' search bar. Below the search bar is a 'Pinned Objects' list with seven items. A red arrow points to the sixth item, 'Count of Loans and Renewals in current year'.

**My Analytics**  
Shared With Me

**Out of the Box**  
Out of the Box Analytics

**Search Analytics Objects**  
Q Search

**Pinned Objects**

- 1 Loans with Library Name and loan date without library co...
- 2 Loans with Library Name and loan date and library-specifi...
- 3 Loans with Library Name and loan date with library code a...
- 4 Loans with Library Name and loan date no library-specific ...
- 5 Loans in current year
- 6 Count of Loans and Renewals in current year ←
- 7 Loans on reading list items vs total loans

## 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

The screenshot shows a web interface for configuring a report. On the left is a sidebar with 'Summary' (selected), 'Schedule', and 'Report Preview'. The main content area is titled 'Count of Loans and Renewals in current year'. It includes fields for 'Type Report', 'Subject Areas Fulfillment', and 'Description'. The 'Report URL' field contains a long alphanumeric string and has a 'Copy link' button next to it. A red arrow points from a yellow callout box to this 'Copy link' button. To the right of the report details, there is information about the 'Analytic Folder', 'Object created by' (Alicia Chen, 04/08/2023 12:44), and 'Object modified by' (Alicia Chen, 07/08/2023 10:48). Below the report details is a 'Schedule' section with 'Recurrence Pattern Weekly' and 'Every Monday At 09:00'. At the bottom, there is a 'Delivery option Attachment' section with 'Format PDF' and an unchecked checkbox for 'FTP'.

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...3A4F7B7FA7E66A35>  
Copy link

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

Schedule

Recurrence Pattern Weekly Every Monday At 09:00

Delivery option Attachment  FTP  
Format PDF

It can be copied here.

## 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

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## 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:

**Illegal Institution - Please try again**



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**IGOLU**  
*International Group of Ex Libris Users*

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