





Analytics Objects

Exercises for Attendees

These exercises require an Alma user with the role "Analytics Administrator."

Add Analytics Widget to Alma Home Page

1. In Alma, open the **Analytics** menu and choose **Analytics Objects List**
2. Notice what happens when you change the  **Type** filter to **Report**, **Dashboard**, or **Data Visualization Workbook**.
3. Select **... Actions > Add New Alma Analytics Object**
4. Analytic Folder: **[your institution folder]**
5. Report Name: **[pick one]**
6. Display Name: **[change if desired]**
7. **Save**
8. In the **Share** section, add Roles as desired, including a role you have
 - a. This means that only Alma users with these roles will be able to add this Widget to their Alma home page.
9. Go to your **Alma Home** page
10. Add Widget  - **pick the object**

Create Analytics Dashboard Object Accessible from Analytics Menu

1. In Alma, open menu **Analytics > Analytics Objects List**
2. Select **... Actions > Add New Alma Analytics Object**
3. Analytic Folder: **Alma / Cost per use via COUNTER reports e-inventory and acquisitions data / Dashboards**
4. Report Name: **Electronic Cost-Usage Dashboard**
5. Display Name: **[change if desired]**

6. **Save**
7. Add **Roles** as desired, but some good ones might be **Acquisitions Administrator; Fiscal Period Manager; Fund Manager; Ledger Manager**, and add one of your roles as well.
8. **Save** the roles popup
9. Choose **Pin to Analytics Menu**
10. Check your Analytics menu to confirm the report is pinned there.

Create Scheduled Report to be Sent to Alma and Non-Alma Users

1. In Alma, open menu **Analytics > Analytics Objects List**
2. Find the Object you created in the first exercise (above)
3. Go to the **Schedule** section
4. Select the toggle switch **Schedule Report**
5. Change the Recurrence Pattern to one that works for the report.
6. Edit the Delivery Options as desired
 - a. Link vs. Attachment
 - b. Attachment Format type
7. Go to the **Manage Subscription** section
8. Click **Add Subscribers**
9. Add subscribers by User Name and External Email as needed.

Every week, these folks will receive the report as an email.

Automate Sending Report to FTP Server

1. In Alma, open menu **Analytics > Analytics Objects List**
2. Find the Object you created in the first exercise (above)
3. Go to the **Schedule** section
4. Open the **Delivery option** section
5. Ensure **Attachment** is selected
6. Check the **FTP** box
7. FTP configuration: **[as desired]**
8. Sub-directory: **[as desired]**
9. Check **Add Timestamp** box
10. **Save**

How do you know if the report was sent to the FTP server? Check the FTP server, or:

11. Open the menu **Admin > Monitor Jobs**
12. **Scheduled** tab

13. Filter Job Category: **Analytics**
14. Pick a job: row-action **Job History**
15. Pick a job: row-action **Report**