Alma Analytics – Data Visualization  
Create a New Data Visualization

Alma’s data visualization is a powerful analysis platform based on the Oracle Analytics Server (or OAS). Data visualizations provide you with insight into Alma activities, help forecast future trends, and allow you to drill down to raw statistics. Data visualizations can help you keep track of, and meet, your institution’s key performance indicators.

In this session, we'll learn how to access your data visualizations and create a new data visualization.

Analytics Designers can access data visualizations via Analytics > Access Data Visualization.

This opens Oracle Analytics.

Here you can search for visualizations, see your recently accessed visualizations, and view all the data visualization workbooks of your institution.

This workbook, for example, provides insight to help you decide which books should be committed to retain. For example, you can see how many titles only have one copy, and to which classifications they belong. You can select between LC Classification and Dewey.

In the top bar, the workbook contains filters to focus on certain data. And on the bottom bar, you can navigate between the various tabs of the workbook.

Click Back on the top left to return to your workbooks.

Now let’s create a new data visualization.

Click Create.

In our example, we’ll create a forecast of expenditures on physical materials vs expenditures on electronic materials, to identify trends and help prioritize acquisitions.

Note that you have the option to create a Dataset, which allows uploading a spreadsheet with data rather than using Alma data.

In our example, we’ll create a new Workbook, which is based on Alma data.

Select a subject area for your visualization. In our example, Funds Expenditure. Click Add to Workbook.

A blank workbook has been created.

On the top left, we can enter a name for the workbook.

Next, let’s add some fields to our analysis.

On the left pane, you can see the subject area with the fields divided into folders.

From the Fund Transactions folder, we’ll select the Transaction Expenditures for Electronic and Physical formats. Hold the Control key to select several fields. Simply drag-and-drop the fields to the canvas.

A visualization is displayed in an automatically selected format (in our example, a scatter chart). In the visualization toolbar, you can change this, for example, to a donut chart. It seems our chart is only showing the electronic transactions. To get a breakdown of physical vs. electronic expenditures, we can drag the physical expenditures field to display as a Value (or Slice).

To see the trend over time, let’s add the Transaction Date Year to our visualization.

To make sense of the data, let’s change the visualization type to a line graph. We’ll display the date as the X-Axis.

Since our data begins in the year 2015, and the current year, 2025, contains only partial data, let’s filter the date to the last ten years. To filter a field, drag it to the Filters bar on top; and select the desired values. Note that you can make more sophisticated filters using SQL queries, via the Filters option in the toolbar.

We can now get a general idea that over time our physical expenditures have gone down, while our electronic ones have gone up.

We can easily add a forecast for future years by clicking Advanced Analytics and dragging the forecast option. The forecast appears in the shaded area. We can extend the length of the forecast by adding more Periods; and change the forecast model, for example to the ARIMA model, which has picked up on the volatility of our electronic expenditure, and foresees a complete downturn of physical expenditure.

When done editing your data visualization workbook, make sure to save it.

So that's how you can access and create data visualizations in Alma Analytics!

Thanks for joining!