

מבוא ל-Alma Analytics



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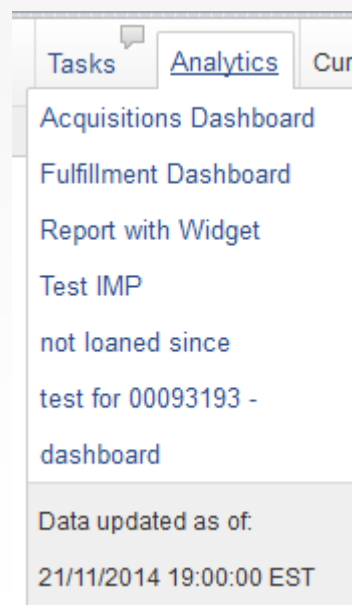
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Alma Analytics

- Alma Analytics מבוסס על הממשק של OBIEE ומאפשר לבנות דוחות על נתונים בעלמה.
- אפשר להריץ דוחות חדשים ולשתף אותם עם משתמשים אחרים בעלמה, או להריץ דוחות מובנים.
- הדוחות מאפשרים לקבל החלטות לגבי האוספים כמו דילול, חידוש מנויים לכתבי-עת והתאמת הרכש לתקציב הספרייה.

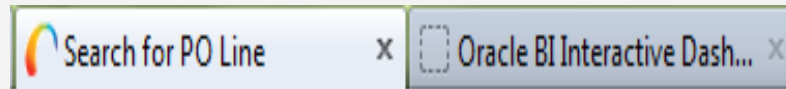
Alma Analytics

- נכנסים לעלמה ובעמוד השער ניתן לראות דוחות וכן את התאריך האחרון של העדכון של Analytics.
- עדכון הנתונים מעלמה נעשה על בסיס יומי בכל הסביבות



Alma Analytics

- Alma Analytics נפתחת בלשונית אחרת מעלמה:

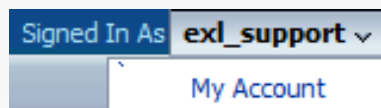


- אחרי לחיצה על הקישור ההתחברות ל-Analytics נעשית אוטומטית לאותו משתמש שהתחבר לעלמה:



Alma Analytics

- כאשר מתחברים ל-Analytics לחיצה על שם המשתמש פותחת אופציות להגדרת העדפות:



My Account [Close]

User ID: 13291530000541_561_D
Display Name: exl_support

Preferences | BI Publisher Preferences | Delivery Options | Roles and Catalog Groups

Starting Page: My Dashboard ▾

Locale (location): Default - English - United States ▾

User Interface Language: English ▾

Time Zone: Default - Unknown Time Zone ▾

Prompts Auto-Complete: On Off

Analysis Editor: Full Editor Start on Results tab when editing Analysis ▾
 Wizard (limited functionality)

Accessibility Mode: On Off

Alma Analytics

- החלון הזה מאפשר לשנות את ההגדרה של דף הבית:

Starting Page	My Dashboard
Locale (location)	Default
Interface Language	Home Page
Time Zone	My Dashboard
Analysis Editor	Community : ARL Reports
Accessibility Mode	Community : BE Holds to Add Report
	Community : Cash Reports
	Community : Cost per Use
	Community : TestDB
	Edinburgh Napier University : Funds
	Edinburgh Napier University : Napier Fulfillment Dashboard

- כמו כן השפה והשעה המקומית יכולים להיות מוגדרים שם:

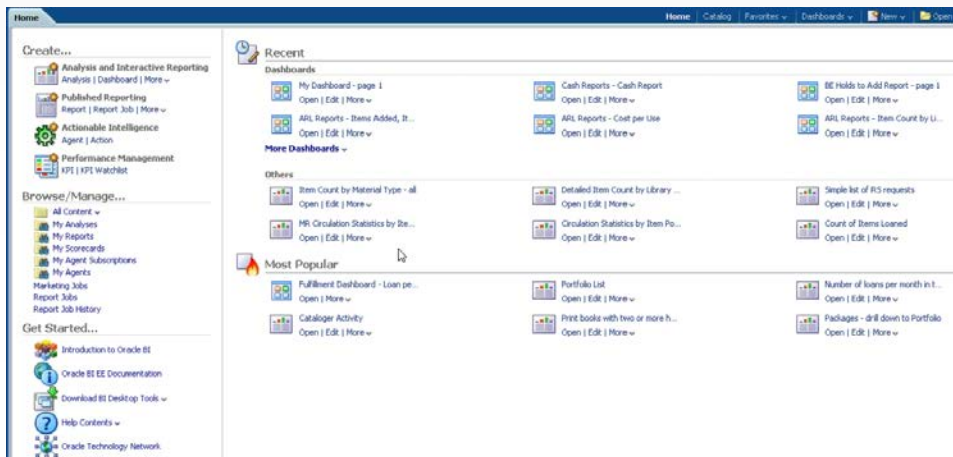
Locale (location)	Default - English - United States
User Interface Language	English
Time Zone	Default - Unknown Time Zone

Alma Analytics

• הלשונית הראשונה היא "הבית" – HOME :

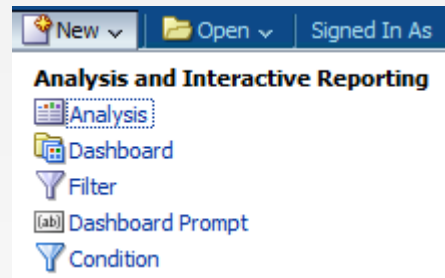


• מכאן ניתן ליצור בקלות דוח חדש, לראות איזה dashboard או דוח עודכנו לאחרונה, וכן את רשימת הדוחות הכי פופולריים:

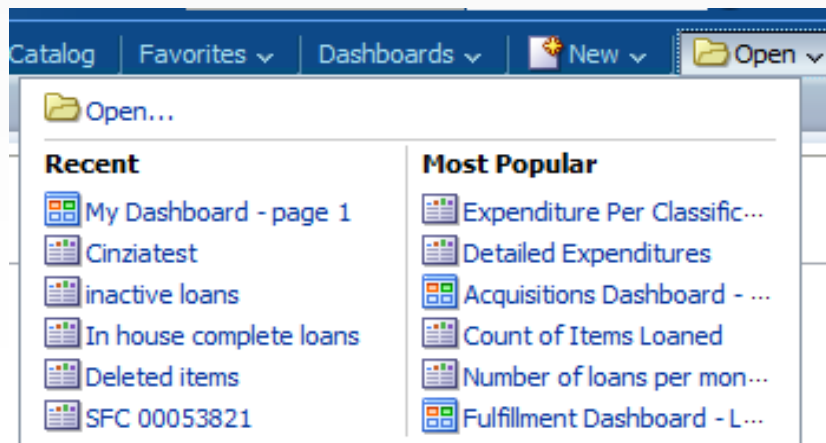


Alma Analytics

- ניתן לפתוח דוח חדש גם מהלשונית New:

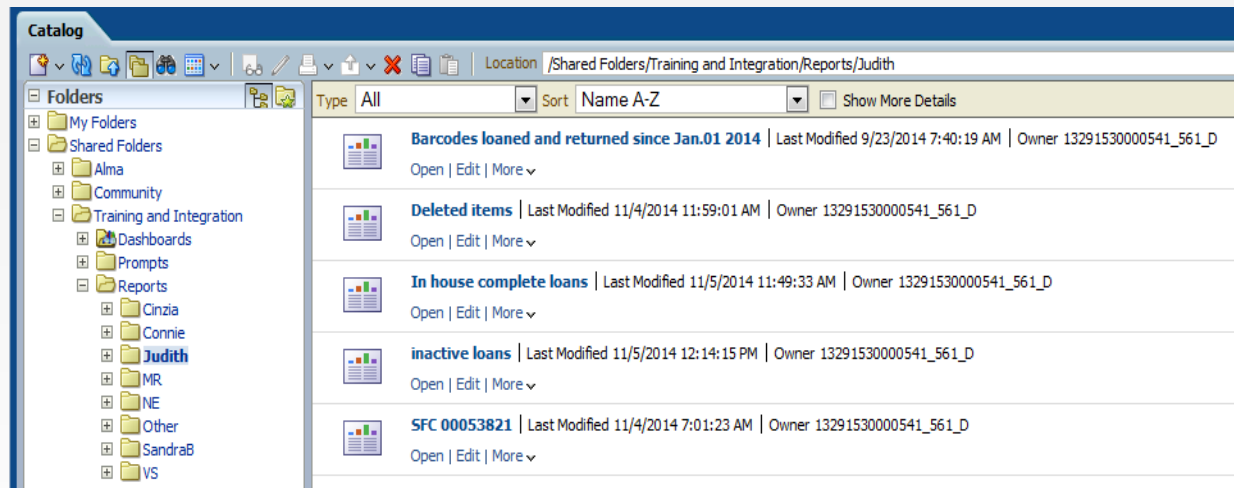


- וכן לראות דוחות אחרונים או פופולריים מהלשונית Open:



Alma Analytics

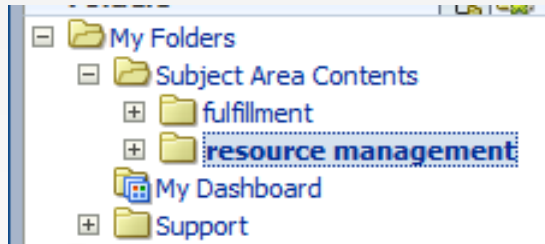
- הלשונית Catalog מכילה את כל הדוחות הנגישים עבורי:



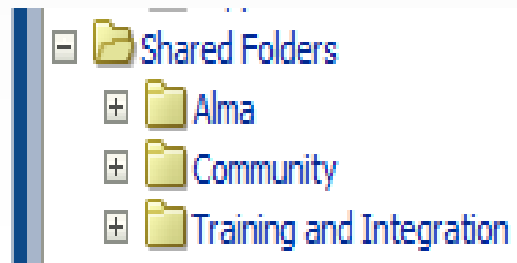
- שימו לב לחלוקה בין "My Folders" (התיקיות שלי) לבין "Shared Folders" (התיקיות המשותפות)

Alma Analytics

- התיקייה שלי מכילה דוחות פרטיים שנוצרו על ידי (על ידי המשתמש שלי) וניתן לעצב אותו וליצור בו תיקיות נוספות:

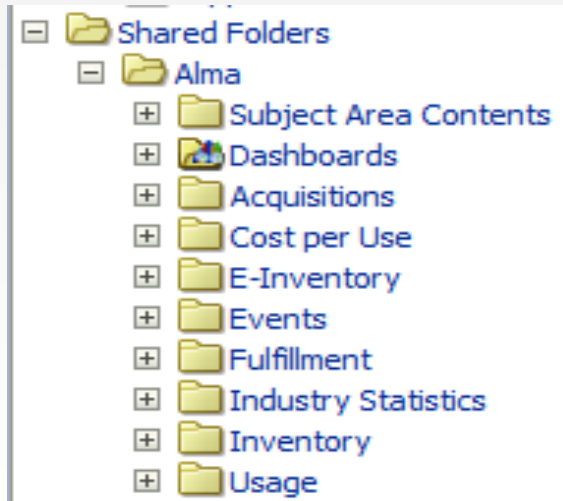


- לעומתה התיקיות המשותפות מכילה 3 תתי-תיקיות:



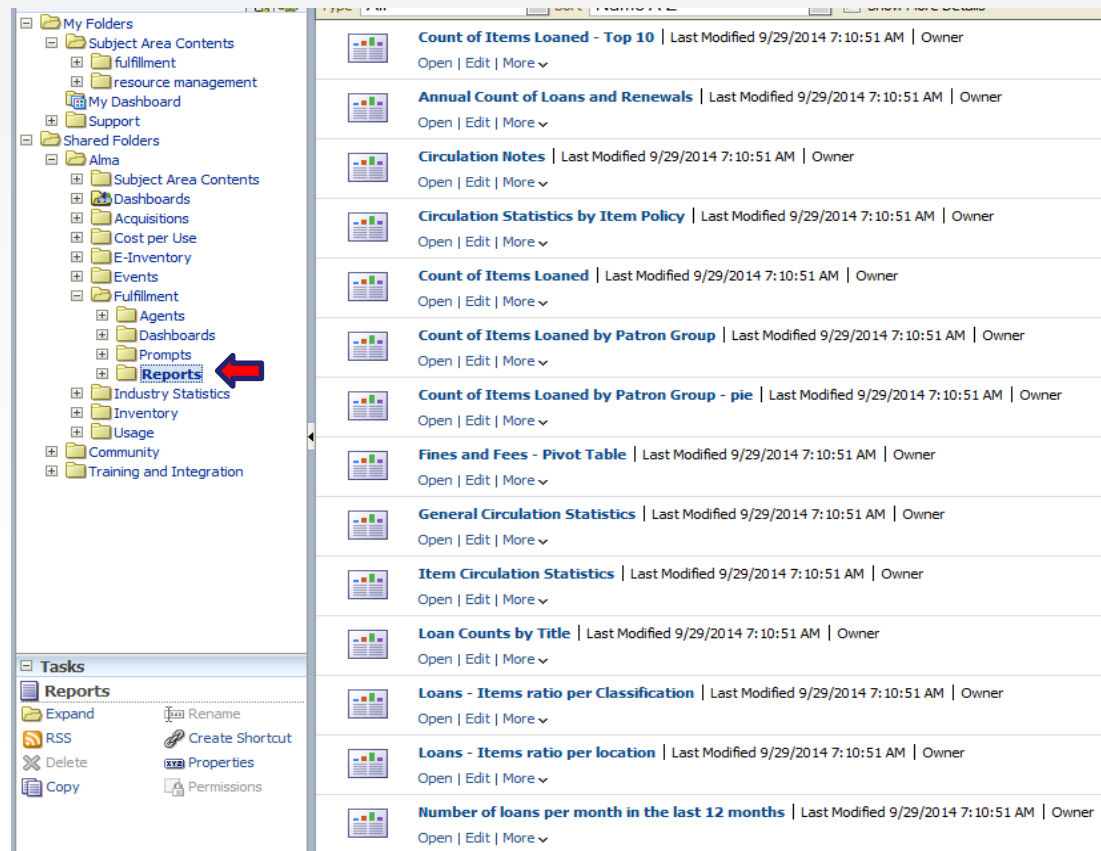
Alma Analytics

- התיקייה הראשונה Alma מכילה דוחות מובנים שנוצרו על ידי אקסליבריס, מחולקים לפי נושאים:



Alma Analytics

- למשל ניתן לראות את כל הדוחות המובנים הקיימים לגבי נושא ההשאלה:

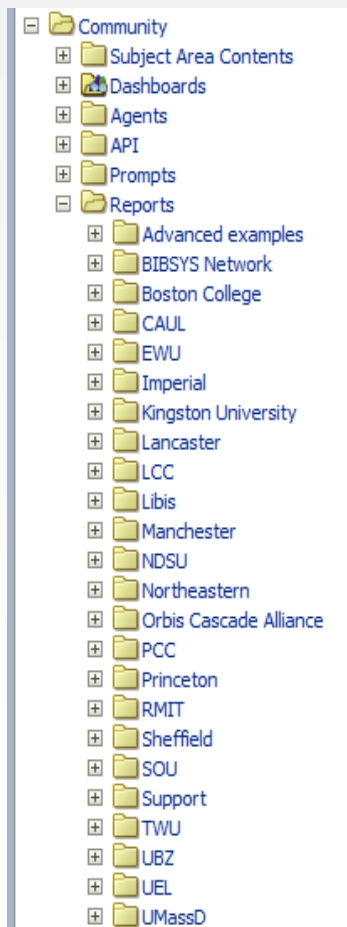


The screenshot displays the Alma Analytics interface. On the left, a folder tree shows the navigation structure. The 'Reports' folder is highlighted with a red arrow. Below the tree is a 'Tasks' panel with options like 'Expand', 'RSS', 'Delete', 'Copy', 'Rename', 'Create Shortcut', 'Properties', and 'Permissions'. The main area on the right lists various reports, each with a small chart icon, a title, and a 'Last Modified' timestamp. The reports listed are:

- Count of Items Loaned - Top 10
- Annual Count of Loans and Renewals
- Circulation Notes
- Circulation Statistics by Item Policy
- Count of Items Loaned
- Count of Items Loaned by Patron Group
- Count of Items Loaned by Patron Group - pie
- Fines and Fees - Pivot Table
- General Circulation Statistics
- Item Circulation Statistics
- Loan Counts by Title
- Loans - Items ratio per Classification
- Loans - Items ratio per location
- Number of loans per month in the last 12 months

Alma Analytics

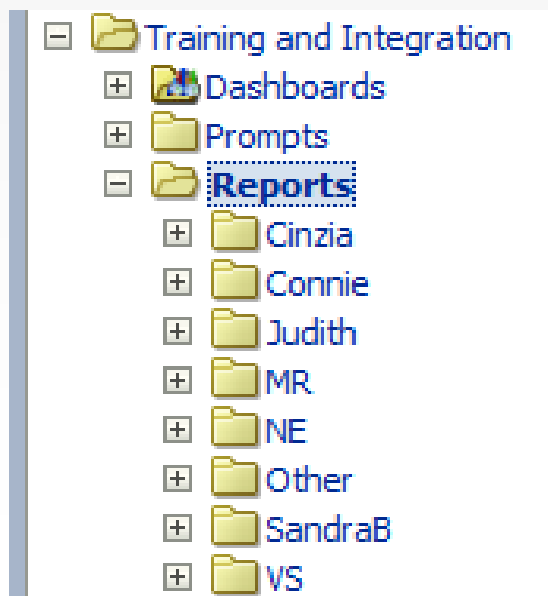
- תחת הלשונית Community – קהילה ניתן לראות דוחות שלקוחות אחרים שיתפו:



כמובן שהרצת דוחות שנבנו על ידי לקוחות אחרים בקהילה יציגו תוצאות על הנתונים הפרטיים של הספרייה שמריצה אותם ולא של ספריית המקור.

Alma Analytics

- התיקייה האחרונה היא התיקייה השייכת למוסד שבו אנו עובדים. אם נרצה לשתף דוחות עם הקהילה עלינו לשמור אותם בתיקייה הזאת, כאשר היא תופיע אצל לקוחות אחרים בקהילה תחת התיקייה Community:

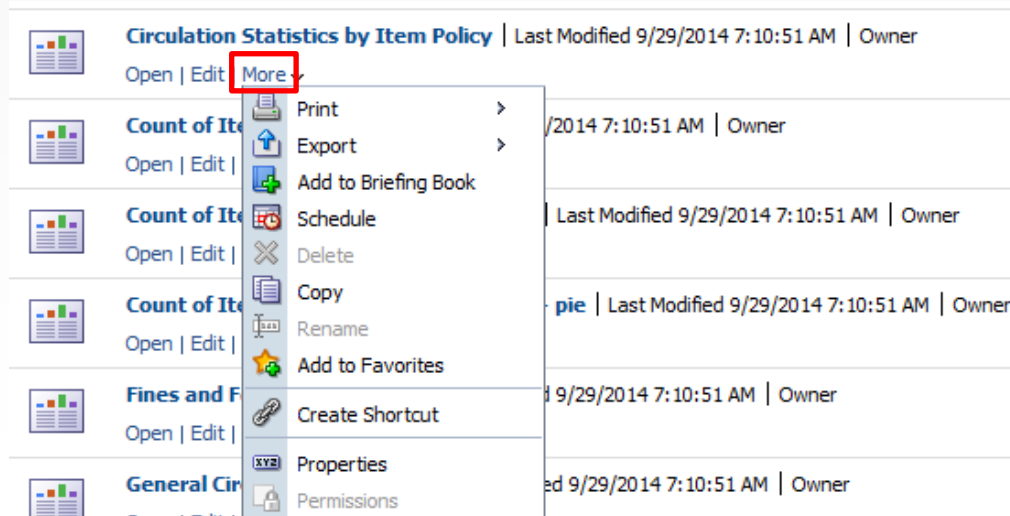


Alma Analytics

- לכל דוח יש אופציה להריץ אותו, לפתוח אותו לעריכה:

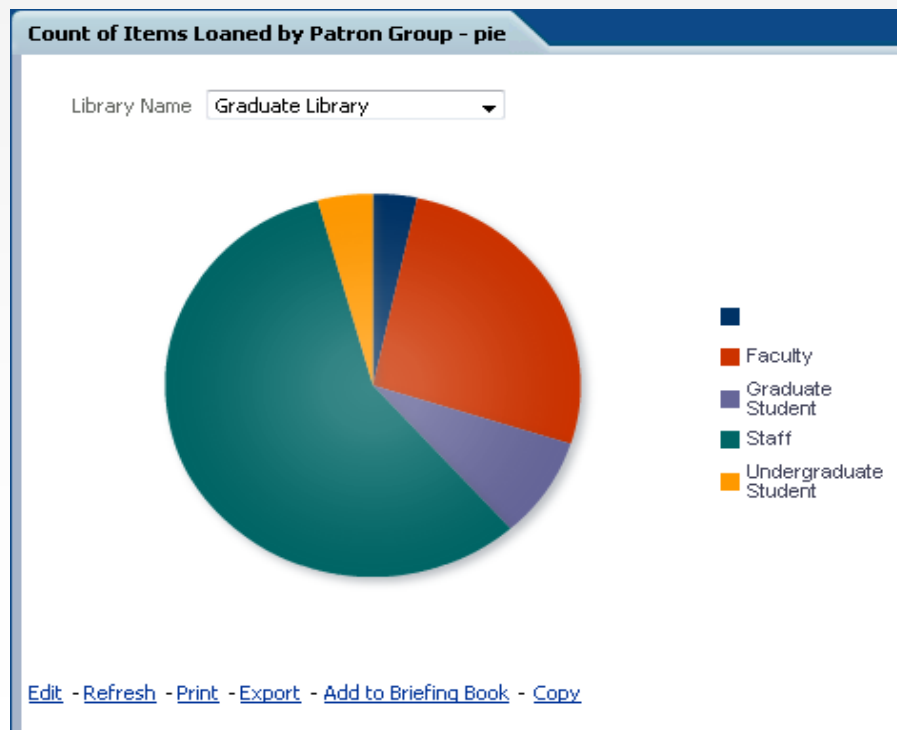


- ה-More נותן לנו אופציות נוספות כמו הדפסה, או ייצוא בפורמטים שונים:



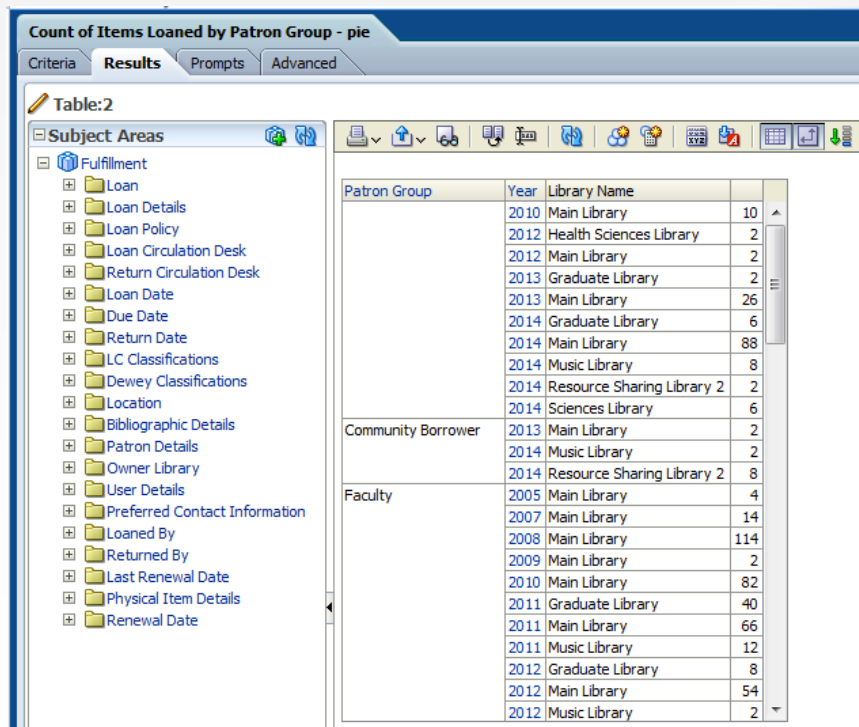
Alma Analytics

- הרצת דוח נותנת לנו את תוצאותיו, בצירוף קישורים המאפשרים את הדפסתו ואת הייצוא שלו:



Alma Analytics

- באותו מסך, על ידי הקלה על "Edit" – ערוך ניתן לפתוח את הדוח המובנה ולשנות אותו.



The screenshot displays the Alma Analytics interface for a report titled "Count of Items Loaned by Patron Group - pie". The interface includes a navigation pane on the left with a tree view of "Subject Areas" such as Fulfillment, Loan, Loan Details, Loan Policy, Loan Circulation Desk, Return Circulation Desk, Loan Date, Due Date, Return Date, LC Classifications, Dewey Classifications, Location, Bibliographic Details, Patron Details, Owner Library, User Details, Preferred Contact Information, Loaned By, Returned By, Last Renewal Date, Physical Item Details, and Renewal Date. The main area shows a table with the following data:

Patron Group	Year	Library Name	Count
Community Borrower	2010	Main Library	10
	2012	Health Sciences Library	2
	2012	Main Library	2
	2013	Graduate Library	2
	2013	Main Library	26
	2014	Graduate Library	6
	2014	Main Library	88
	2014	Music Library	8
	2014	Resource Sharing Library 2	2
	2014	Sciences Library	6
Community Borrower	2013	Main Library	2
	2014	Music Library	2
Faculty	2014	Resource Sharing Library 2	8
	2005	Main Library	4
	2007	Main Library	14
	2008	Main Library	114
	2009	Main Library	2
	2010	Main Library	82
	2011	Graduate Library	40
	2011	Main Library	66
	2011	Music Library	12
	2012	Graduate Library	8
2012	Main Library	54	
2012	Music Library	2	

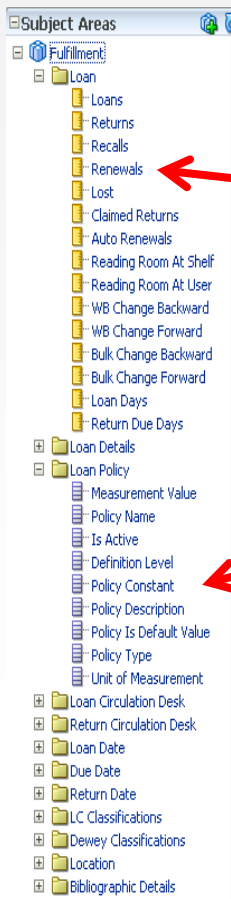
כמובן שלא ניתן לשמור את השינויים שנעשו על דוח מובנה, אלא רק לשמור אותו תחת שם שונה בתיקייה פרטית או בתיקייה משותפת

Alma Analytics

- ניתן גם כן ליצור דוח חדש. במקרה כזה המערכת תציע לי לבחור בתחום תוכן אחד מתוך רשימה:



Alma Analytics

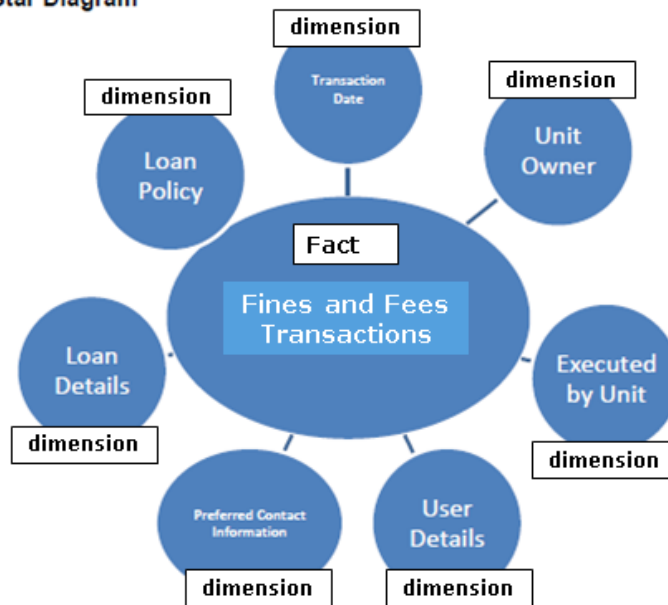


כל תחומי התוכן מחולקים לנושאים
שונים, כאשר לרוב הנושא הראשון
מכיל את השדות הכמותיים של אותו
תחום, ושאר הנושאים מכילים את
השדות התיאוריים:

Alma Analytics

- בזכות מבנה "הכוכב" של שדות התוכן ולפי תנאים מסומיים ניתן לחבר בין שני תחומי תוכן כאשר יש להם לפחות שדה אחד משותף:

3.4.1 Star Diagram



למשף מבנה
תחום תוכן
ההשאלה:

Alma Analytics

- ניתן למשל לשלב בין נתוני השאלה של פריטים לבין גובה הקנסות שנגבו עליהם:

The screenshot displays the Alma Analytics interface with the following annotations:

- Fact:** A box labeled "Fact" points to the "Loan Policy" folder in the "Fines and Fees" subject area.
- Non-common dimensions:** Two boxes labeled "Non-common dimensions" with blue arrows point to the "Transaction Date" and "Loan Date" folders, respectively.
- Common dimensions:** A box labeled "“Loan Details” and “Loan Policy” are common dimensions to both subject areas" with red arrows points to the "Loan Details" folders in both the "Fines and Fees" and "Fulfillment" subject areas.
- Selected Columns:** A box labeled "Selected Columns" with a red arrow points to the "Selected Columns" pane on the right.
- Filters:** A box labeled "Add filters to the analysis criteria by its name in the catalog pane." with a red arrow points to the "Filters" pane on the right.

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Alma Analytics

• בניית הדוח נעשית בלשונית Criteria:

Loan Details				Loan Policy		Loan		Fines and Fees Transactions	
Loan Date	MMS ID	Due Date	Title	Author	Barcode	Policy Name	Loans	Loan Days	Transaction Amount

• הצפייה בתוצאות נעשית בלשונית Results:

Loan Date	MMS ID	Due Date	Title	Author	Barcode	Policy Name	Loans	Loan Days	Transaction Amount
12/19/2001	991176650000541	9/5/2011	Myths of the North American Indians / by Lewis Spence... with thirty-two plates in colour by James Jack, and other illustrations.	Spence, Lewis, 1074-1955.	92740	2 week Loan	3	12,036	100
	991220220000541	9/5/2011	Dictionary of American idioms / based on the earlier edition / [edited by] M.T. Boothor, J.E. Cotos, and Adam Malkoi.	Default Author	52057	No Loan	3	12,036	180
9/24/2003	9913412110000541	9/5/2011	Call it courage [by] Armstrong Sperry; illustrations by the author.	Sperry, Armstrong, 1891-	41477		1	0	
	991354680000541	9/5/2011	Flowering of New England.	Brooks, Yan Wyck, 1886-1963.	54002		1	0	
	991405490000541	9/5/2011	Golf manual for teachers / by Betty Hicks and Ellen J. Griffin.	Hicks, Betty.	13574		1	0	
	991444010000541	9/5/2011	Flowers of the Holy Land : 17 color reproductions of original watercolors / [by] Bertha Spafford Vester ; with a biographical sketch by Lowell Thomas and a note by Norman Vincent Peale.	Vester, Bertha Spafford, 1878-1968.	47895		1	0	
	991446400000541	9/5/2011	Dog on the sun : a volume of stones.	Green, Paul, 1894-1981.	41088		1	0	
	99974050000541	9/5/2011	Curser of Caralis: the four seasons in Hilton Head Island, Beaufort and Bluffton. Illustrated by Jim Palmer.	Trujillo, Felli.	13504		1	0	
	99990240000541	9/5/2011	Man [by] Richard J. Harrison [and] William Montagna.	Harrison, Richard John, 1920-	17759		1	0	
5/18/2003	991216780000541	9/19/2011	Geography, by George Grove.	Grove, George, Sr, 1820-1900.	90711	6 week Loan	1	0	
10/6/2005	991554120000541	10/6/2006	Geography and a crowding world. Edited by Wilbur Zelensky, Leszek A. Kosinski [and] R. Mansell Prothero.	Symposium on Population Pressures upon Physical and Social Resources in the Developing Lands (1967 : Pennsylvania State University)	81953	6 week Loan	3	7,878	
	99937710000541	6/6/2005	Wild flowers / three hundred and sixty-four full-color illustrations with complete descriptive text, by Homer D. House.	House, Homer Doliver, 1878-1949.	44345	6 week Loan	3	7,878	
9/5/2006	991127040000541	8/25/2011	Paint, powder, and make-up : the art of theater make-up from the amateur and discerning viewpoint / [by] Iward Strauss.	Strauss, Iward.	80277		1	0	
	99124520000541	8/25/2011	Flowers of coast and sierra, with thirty-two plates in color, by Edith S. Clements ...	Clements, Edith S. (Edith Schwartz)	44532		1	0	
	99131000000541	8/25/2011	Animals worth knowing / Ernest Thompson Seton.	Seton, Ernest Thompson, 1860-1946.	97350		1	0	
6/11/2007	991422950000541	8/25/2011	Politics of culture / edited by Brett Williams.	Williams, Brett.	13719		1	0	
6/19/2007	99125910000541	9/19/2011	See you at the movies : the autobiography of Melvyn Douglas / Melvyn Douglas and Tom Arthur.	Douglas, Melvyn.	71578		1	0	
	991310080000541	10/19/2010	Off the record : a reporter unveils the celebrity worlds of Hollywood, hip hop, and sports / Allison Samuels.	Samuels, Allison.	56767193		1	0	
10/25/2007	991104370000541	9/19/2011	Suave qui peat / par Sempé.	Sempé, 1952-	77261	6 week Loan	1	0	
	991209130000541	2/28/2014	Glorious flight : across the Channel with Louis Bleriot / by Alice and Martin Provensen.	Provensen, Alice.	32505	6 week Loan	1	0	
	991308890000541	2/28/2014	Games presidents play : sports and the presidency / John Saylor Watterson.	Watterson, John Saylor.	56040259	6 week Loan	1	0	
	991309740000541	2/28/2014	Backpat nation : rebuilding and gentrifying across our landscape of back / Richard Huffer.	Huffer, Richard.	56785010	6 week Loan	1	0	
	991461810000541	10/19/2010	Confessions of an actor.	Barrymore, Julia, 1882-1942.	20993	6 week Loan	1	0	

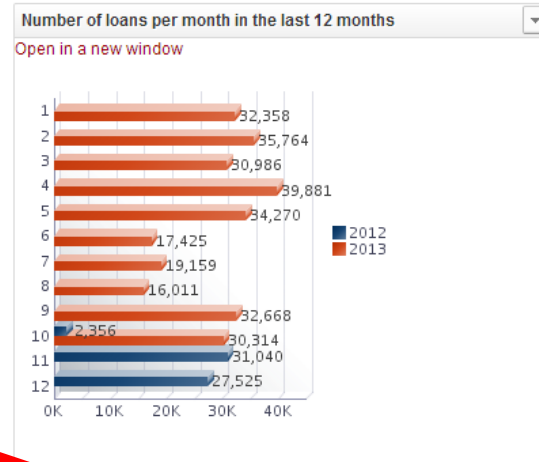
Alma Analytics

- כאשר יוצרים דוח ב- Analytics ניתן להציג אותו על עמוד השער של Alma – Dashboard :

Library Code	Location Code	Year Key	Month Key	Loans
BAPST	ART	2013	1	293
			2	305
			3	405
			4	558
			5	186
			6	89
ART Total				1,836
GAR		2013	1	16
			2	24
			3	17
			4	19
			5	13
			6	9
GAR Total				98
INFO_4H		2013	1	57
			2	174
			3	123
			4	226
			5	130
			6	1
INFO_4H Total				711
OVER		2013	1	1
			2	1
			3	7

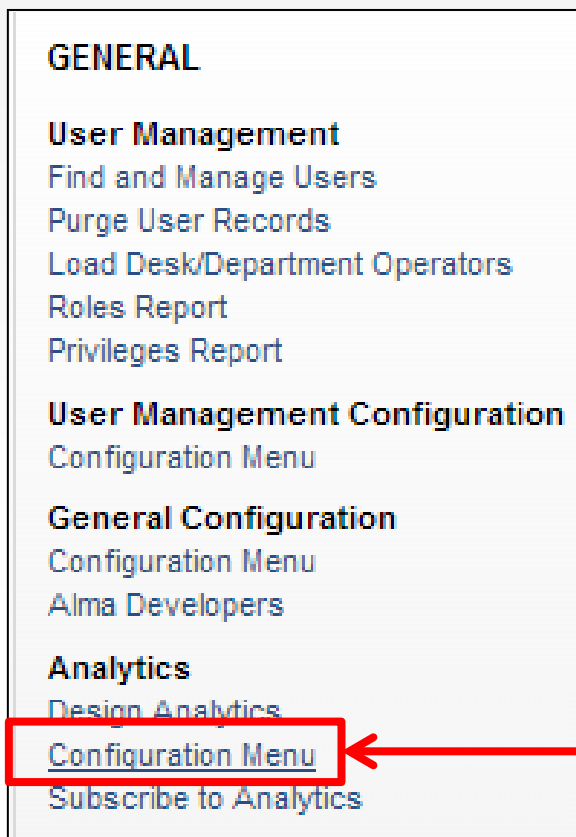
Tasks
Invoices - review - without assignment (7)
Order Lines - review - assigned to you (1)
Order Lines with claims (424)
Requests - pickup from shelf (28)
New Lending Requests - unassigned (8)
Borrowing Requests returned by patron (30)
Electronic resources - activation - assigned to you (1)
Electronic resources - activation - unassigned (847)
Invoices - approval - without assignment (17)

Name	Success Rate
Export Payment	(100 %)
PO Line - Packaging	(100 %)
PO Line - Renewal	(100 %)
Invoice - Load EDI	(100 %)
PO Line - Claiming	(100 %)
Trials - Start and Notify Participants	(100 %)



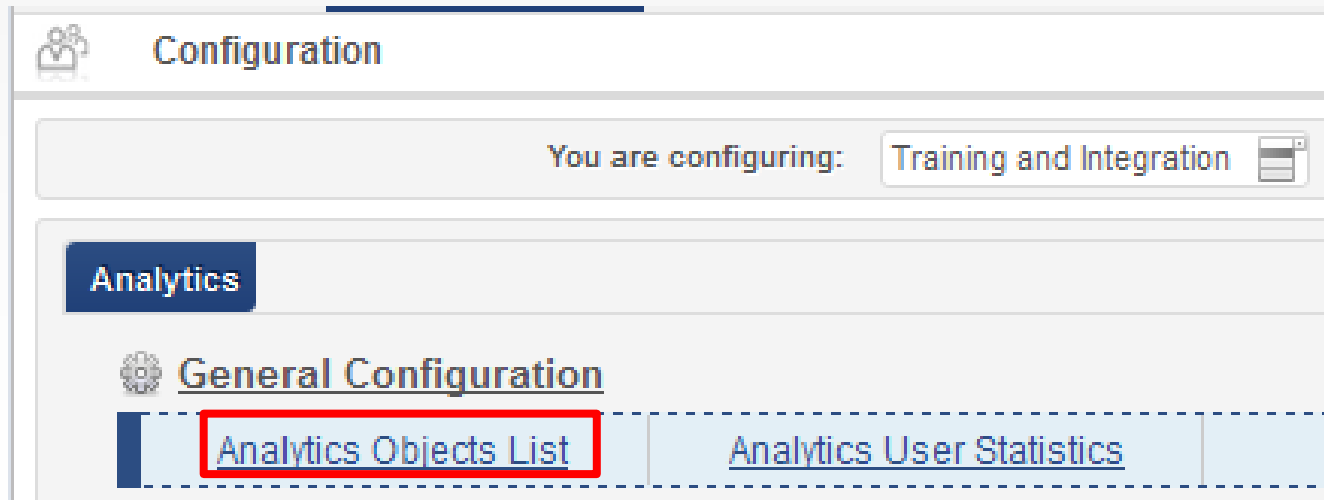
Alma Analytics

General > Analytics > מתוך עלמה נלך ל-
Configuration Menu



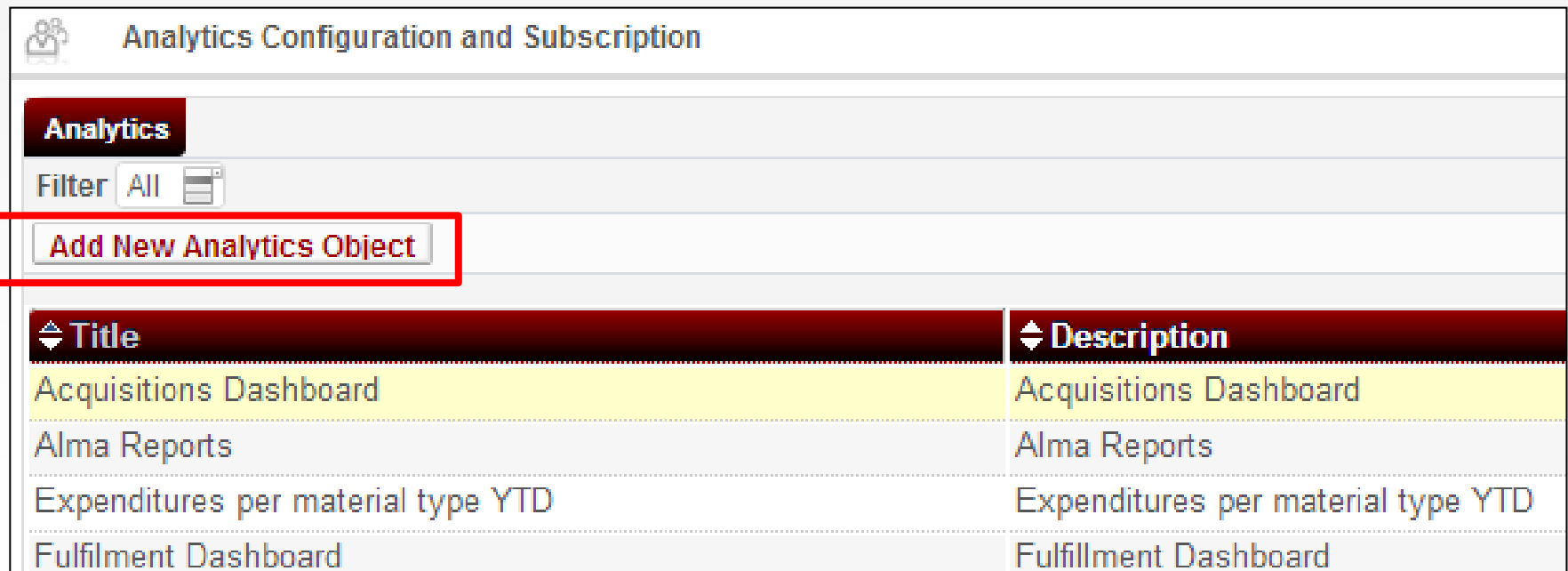
Alma Analytics

- תחת התפריט Analytics נבחר:
- “General Configuration > Analytics Objects List”



Alma Analytics

• בחר "Add New Analytics Object"



The screenshot shows the 'Analytics Configuration and Subscription' page. At the top, there is a header with a user icon and the text 'Analytics Configuration and Subscription'. Below this is a section titled 'Analytics' with a 'Filter All' button. A red box highlights the 'Add New Analytics Object' button. Below the button is a table with two columns: 'Title' and 'Description'.

Title	Description
Acquisitions Dashboard	Acquisitions Dashboard
Alma Reports	Alma Reports
Expenditures per material type YTD	Expenditures per material type YTD
Fulfilment Dashboard	Fulfilment Dashboard

Alma Analytics

בחר בסוג "Widget" כדי לאפשר את
הוספתו לדף הבית של עלמה

שם הדוח ומיקום התיקייה שבה הוא נשמר

Analytics Configuration

General Information

Title *	Number of loans by library and date	Name *	0 Yoel Num of loans
Analytic Folder *	Boston College/Reports	Frequency	
Type *	Widget		
Description	Number of loans by library and date		
Last Update	10/30/2013	Updated By	Ex Libris

Roles

[Add Role](#)

Role	Description
Fulfillment Administrator	Manages Fulfillment related configurations such as policies, terms of use, Fulfillm

ההרשאה הנדרשת למשתמש כדי שהוא
יוכל להוסיף את הדוח ל-Dashboard שלו.

Alma Analytics

- בשלב הזה הדוח מתווסף לרשימת האובייקטים:

Analytics Configuration and Subscription [Back](#)

Analytics

Filter

[Add New Analytics Object](#) 1 - 10 of 10 Records [Tools](#)

Title	Description	Frequency	Type	Subscribe	
Acquisitions Dashboard	Acquisitions Dashboard	-	Dashboard		Actions
Alma Reports	Alma Reports	-	Dashboard		Actions
Expenditures per material type YTD	Expenditures per material type YTD	-	Widget		Actions
Fulfillment Dashboard	Fulfillment Dashboard	-	Dashboard		Actions
Number of loans by library and date	Number of loans by library and date	-	Widget		Actions

Alma Analytics

• מתוך עלמה בחר "Add Widget"

The screenshot displays the Alma Analytics dashboard. The top navigation bar includes the ExLibris logo, the Alma title, a search bar, and tabs for 'Tasks' and 'Analytics'. The current location is 'Main Library - Default Circ...'. A user is logged in as 'exl_support, exl...'. A red arrow points to the 'Add Widget' button in the top right corner.

Tasks

- Invoices - review - without assignment (7)
- Order Lines - review - assigned to you (1)
- Order Lines with claims (424)
- Requests - pickup from shelf (28)
- New Lending Requests - unassigned (8)
- Borrowing Requests returned by patron (30)
- Electronic resources - activation - assigned to you (1)
- Electronic resources - activation - unassigned (847)
- Invoices - approval - without assignment (17)

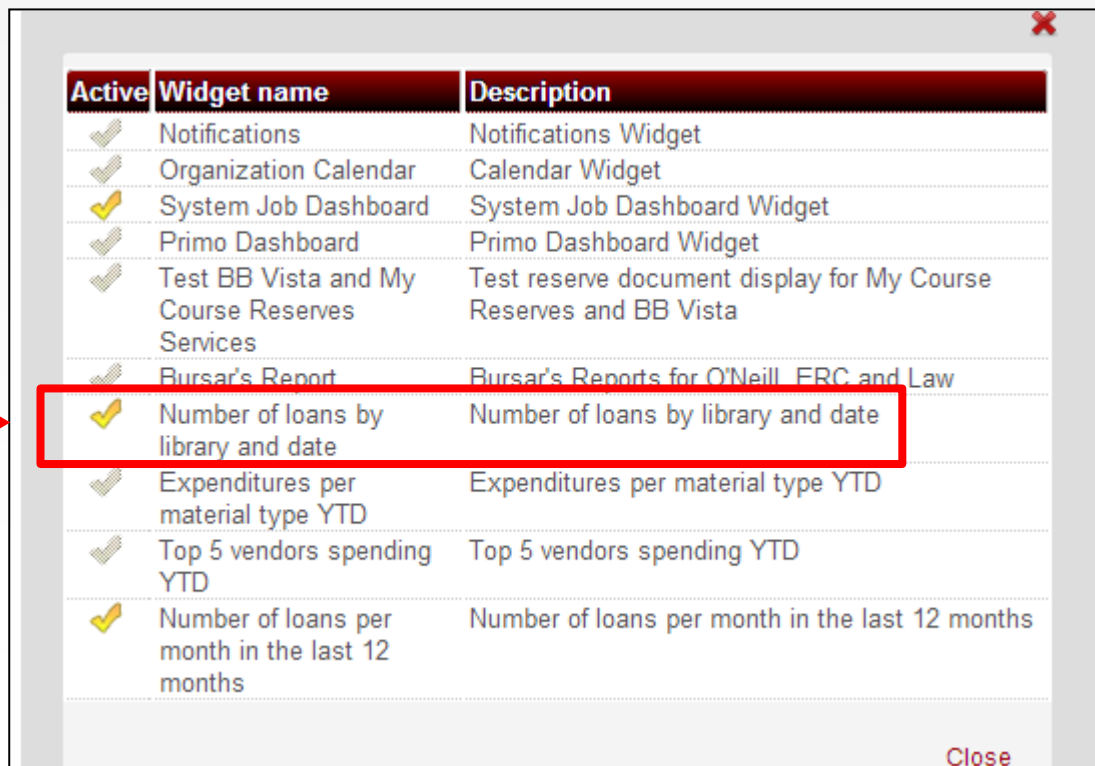
Number of loans per month in the last 12 months

Open in a new window

Month	2012	2013
1		32,358
2		35,764
3		30,986
4		39,881
5		34,270
6		17,425
7		19,159
8		16,011
9		32,668
10	2,356	30,314

Alma Analytics

- הקלק על הסימון הצהוב Active כדי להפוך את ה-Widget החדש לפעיל:



Active	Widget name	Description
<input checked="" type="checkbox"/>	Notifications	Notifications Widget
<input checked="" type="checkbox"/>	Organization Calendar	Calendar Widget
<input checked="" type="checkbox"/>	System Job Dashboard	System Job Dashboard Widget
<input checked="" type="checkbox"/>	Primo Dashboard	Primo Dashboard Widget
<input checked="" type="checkbox"/>	Test BB Vista and My Course Reserves Services	Test reserve document display for My Course Reserves and BB Vista
<input checked="" type="checkbox"/>	Bursar's Report	Bursar's Reports for O'Neill, ERC and Law
<input checked="" type="checkbox"/>	Number of loans by library and date	Number of loans by library and date
<input checked="" type="checkbox"/>	Expenditures per material type YTD	Expenditures per material type YTD
<input checked="" type="checkbox"/>	Top 5 vendors spending YTD	Top 5 vendors spending YTD
<input checked="" type="checkbox"/>	Number of loans per month in the last 12 months	Number of loans per month in the last 12 months

Alma Analytics

- עכשיו הדוח מופיע ב-Dashboard – עמוד השער של עלמה:

Tasks

- Invoices - review - without assignment (7)
- Order Lines - review - assigned to you (1)
- Order Lines with claims (424)
- Requests - pickup from shelf (28)
- New Lending Requests - unassigned (8)
- Borrowing Requests returned by patron (30)
- Electronic resources - activation - assigned to you (1)
- Electronic resources - activation - unassigned (847)
- Invoices - approval - without assignment (17)

System Job Dashboard

Name	Success Rate
Export Payment	(100 %)
PO Line - Packaging	(100 %)

Number of loans per month in the last 12 months

Open in a new window

Month	2012	2013
1		32,358
2		35,764
3		30,986
4		39,881
5		34,270
6		17,425
7		19,159
8		16,011
9		32,668
10	2,356	30,314
11		31,040
12		27,525

Number of loans by library and date

Open in a new window

0 Yoel Num of loans

Library Code	Location Code	Year Key	Month Key	Loans
BAPST	ART	2013	1	293
			2	305
			3	405
			4	558
			5	186
			6	89
ART Total				1,836
GAR		2013	1	16
			2	24
			3	17
			4	19
			5	13
			6	9
GAR Total				98

הדוח הזה התווסף ל-Dashboard

Alma Analytics

- ניתן להזיז ולמחוק כל אחד מהאובייקטים ב-Dashboard של עלמה:

The screenshot displays the Alma Analytics dashboard. On the left, there is a 'Tasks' panel with a list of items: Invoices - review - without assignment (7), Order Lines - review - assigned to you (1), Order Lines with claims (424), Requests - pickup from shelf (28), New Lending Requests - unassigned (8), Borrowing Requests returned by patron (30), Electronic resources - activation - assigned to you (1), Electronic resources - activation - unassigned (847), and Invoices - approval - without assignment (17). Below this is a 'System Job Dashboard' section. On the right, there is a table titled 'Number of loans by library and date'. Above the table, there is a 'Remove' button with two red arrows pointing to it. The table shows loan data for BAPST and GAR libraries across months 1-6 of 2013, with totals for each library.

Library Code	Location Code	Year Key	Month Key	Loans
BAPST	ART	2013	1	293
			2	305
			3	405
			4	558
			5	186
			6	89
ART Total				1,836
GAR		2013	1	16
			2	24
			3	17
			4	19
			5	13
			6	9
GAR Total				98



תודה רבה!

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