Session 1: Overview and Introduction to Analytics
A few points about WebEx

- Technical issues? Exit and rejoin the WebEx session
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen
### Session Topics

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• Accessing Analytics
• Designers, Consumers, and Roles
• ETL – Extract, Transform, and Load
• Folder Structure
• Dashboards
• Create a (very basic) Report
• How Reports are “Consumed”
New Interface or Old Interface?

New

Old

Dashboard
Alma Home
Analytics

Analytics

No Analytics Objects were added to favorites.
To add an Analytics Object, choose the desired report from the object list and select “Add to Favorites” from the top section of the right panel.

My Analytics
Analytics Object List
Create Analytics
Access Analytics
Access Data Visualization
Access Analytics (Primo)
Access Data Visualization (Primo)

Out of the Box Reports

Data available as of: 02/07/2023 01:07:59 EST
Data updated as of: 02/06/2023 19:05:00 EST

Reports
API Usage Dashboard (Ex Libris)
Acquisitions
Acquisitions - Claims Dashboard (Ex Libris)
Acquisitions - Fund Reports (Ex Libris)
Acquisitions Dashboard (Ex Libris)
Analytics Objects Dashboard (Ex Libris)
Analytics Usage Tracking Dashboard (Ex Libris)
Benchmark Analytics KPI dashboard (Ex Libris)
Cost per Use for Electronic Inventory and COUNTER reports Dashboard (Ex Libris)
Cost per Use for Physical Inventory and Loans Dashboard (Ex Libris)
E-Inventory Dashboard (Ex Libris)
Fines and Fees Dashboard (Ex Libris)
Fulfillment
Fulfillment - Loans Returns and Overdue Dashboard (Ex Libris)
Items Transferred
Licenses Analysis Dashboard (Ex Libris)
Monthly Usage Data - Release 5 Dashboard (Ex Libris)
Overlap Analysis Dashboard (Ex Libris)
Overlap of Print and Electronic Inventory
Physical Items Dashboard (Ex Libris)
Purchase Requests Dashboard (Ex Libris)
Usage via Alma Link Resolver Dashboard (Ex Libris)
Usage via COUNTER Reports - Release 4 Dashboard (Ex Libris)
Usage via COUNTER Reports - Release 5 Dashboard (Ex Libris)
Users by User Group

Data available as of: 02/07/2023 01:07:59 EST
Data updated as of: 02/06/2023 19:05:00 EST
Switch to New Interface Now!

New interface will default to “on” after May 7.
Old interface will not be available after August 6.
• Accessing Analytics
• Designers, Consumers, and Roles
• ETL – Extract, Transform, and Load
• Folder Structure
• Dashboards
• Create a (very basic) Report
• How Reports are “Consumed”
Designers and Consumers

Designers create, edit, and delete reports and other entities.

Consumers view the report as part of dashboard, as a standalone report, receive by email a scheduled report, or view a widget on their Alma landing page.
Analytics User Roles in Alma

• Analytics Administrator
  • Manages Alma Analytics configuration including Analytics Objects List, Analytics User Statistics, and Analytics Citation Attribute Types.

• Designs Analytics
  • Permitted to design, create, edit, delete and work on any analytics reports, analysis, dashboards etc., as well as Data Visualization projects.
Analytics Roles

A user with both roles “Analytics Administrator” and “Designs Analytics”

A user with role “Designs Analytics” but not “Analytics Administrator”

A user with role “Analytics Administrator” but not “Designs Analytics”
Analytics Consumer

• A person who receives or can access analytics reports

• The reports can be consumed as “Analytics Objects”:
  • Via email as a scheduled report
  • Via a dashboard accessed from the “Analytics” menu in Alma
  • Via a report accessed from the “Analytics” menu in Alma
  • Via a widget on the Alma landing page
  • Via an API
  • From within Analytics tool as a Designer
Analytics Menu for Consumers

Consumers access reports and dashboards on Shared With Me
• Accessing Analytics
• Designers, Consumers, and Roles
• ETL – Extract, Transform, and Load
• Folder Structure
• Dashboards
• Create a (very basic) Report
• How Reports are “Consumed”
Extract, Transform and Load

• An incremental ETL occurs every night.
• Data in Alma Analytics (Oracle) is up-to-date and identical with data in Alma.
• Data from most subject areas are updated daily.
• A few subject areas are updated less frequently.
• Accessing Analytics
• Designers, Consumers, and Roles
• ETL – Extract, Transform, and Load
• **Folder Structure**
• Dashboards
• Create a (very basic) Report
• How Reports are “Consumed”
- Accessing Analytics
- Designers, Consumers, and Roles
- ETL – Extract, Transform, and Load
- Folder Structure
- **Dashboards**
- Create a (very basic) Report
- How Reports are “Consumed”
• Accessing Analytics
• Designers, Consumers, and Roles
• ETL – Extract, Transform, and Load
• Folder Structure
• Dashboards
• **Create a (very basic) Report**
• How Reports are “Consumed”
Create an Analytics Report

“How many Alma users are assigned to each user group?”

• Create: Analysis
• Select Subject Area: Users
• Selected Columns:
  • User Details > User Group
  • User Measures > Number of Users
• Check Results
• Add visualization
• Accessing Analytics
• Designers, Consumers, and Roles
• ETL – Extract, Transform, and Load
• Folder Structure
• Dashboards
• Create a (very basic) Report
• How Reports are “Consumed”
Conclusion
More Resources

• Alma Analytics Documentation
  • Alma > Online Help > Analytics

• Alma Analytics Subject Areas
  • Alma > Online Help > Analytics > Alma Analytics Subject Areas

• Training Videos
  • Knowledge Center > Alma > Training > Analytics
  • Ex Libris YouTube Channel – search for Alma Analytics

• Custom Training
  • Premium.Services@exlibrisgroup.com
### Alma Analytics: Become an Expert

Alma Analytics: Become an Expert is a series of eight 90-minute sessions intended to provide learning opportunities for Alma Analytics operators at all levels. These sessions include information on using Analytics to manage inventory, monitor Acquisitions and Fulfillment activities and more.

The Master Class is structured as follows:
- **Session 01**: A general overview and introduction.
- **Sessions 02-03**: A focus on specific areas such as physical and electronic inventory, fulfillment, acquisitions, and COUNTER usage.
- **Sessions 04-08**: A drill down to specific analytics functionalities which can help make reports be created and "consumed" more efficiently.

**Additional Resources and Session Recording**

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| 01             | Overview and Introduction to Analytics | This session will include the following topics: documentation, roles, accessing and "consuming" analytics, subject areas, ETL, folder structure and using the default ready-to-use reports and dashboards. Time permitting we will begin some actual report creation. | - Presentation Slides (coming Feb. 13)  
- Exercises (coming Feb. 14)  
- More documentation and training resources:  
  - Documentation  
  - Analytics Subject Areas  
  - Training Resources  
- Recording (coming Feb. 17) | Registration  
  - Tuesday, February 14  
  - 9:00 AM London  
  - 10:00 AM Berlin  
  - 11:00 AM Jerusalem  
  - 1:00 PM Dubai  
- Recording (coming Feb. 17) | Registration  
  - Thursday, February 16  
  - 9:00 AM Hong Kong  
  - 12:00 PM Sydney  
  - 2:00 PM Wellington  
  - 3:00 PM Honolulu  
  - Wednesday, February 15 | Registration  
  - Thursday, February 16  
  - 9:00 AM Los Angeles, CA  
  - 12:00 PM Boston, MA  
  - 1:00 PM Charlotte, NC  
  - 2:00 PM Brasilia, DF  
  - Recording (coming Feb. 17) |
Next Week: Physical Inventory, and Fulfillment

• Review default reports and dashboards
• Customize default reports
• Create new reports
  • Items missing or lost more than x months ago
  • Duplicate barcodes
  • Most-requested items
  • and more!
Thank you!

Please fill out the survey that will appear when you close the WebEx meeting