Analytics in Alma

A new user interface of Analytics within Alma

Raphael Gabbay
Product Manager

Agenda

Alma Analytics Enhanced UI

▶ Key Features

▶ Schedule and Rollout Plan
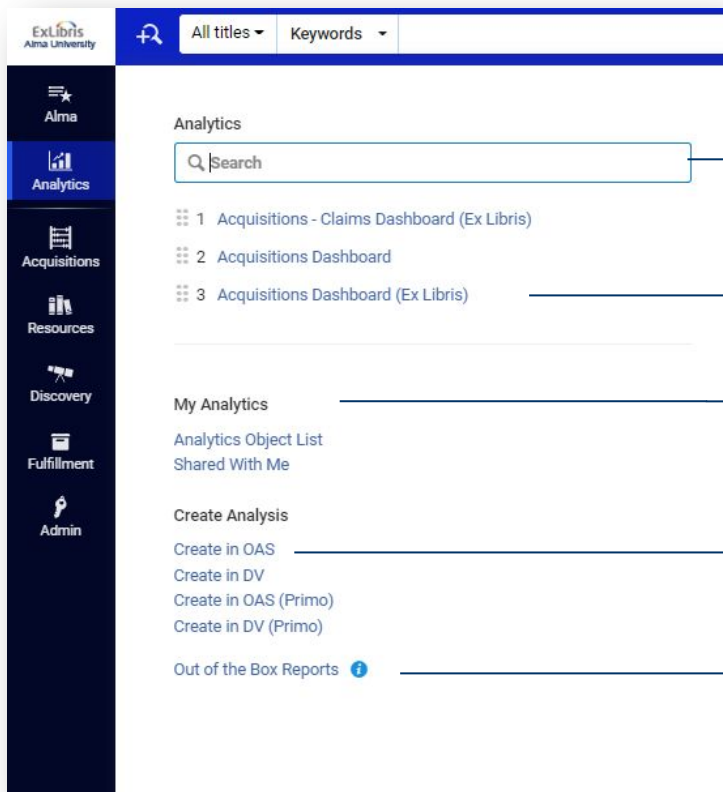
ExLibris
Part of Clarivate

Alma Analytics Enhanced UI

Analytics tools are essential for librarians and should be as integrated as possible with their library management systems.

The values we strived to achieve

▶ Easy Sharing

▶ Easy Access

▶ Preview of Report Information

▶ Staying in Alma

ExLibris.
Part of **Clarivate**

New Menu: Easy Access (to what matters to you)

"Search" all "Analytics Objects" (role based)

"Favorites Analytics" quick links

"Analytics object list"-admins only
"Shared with me" – All users

"create reports" – Link to OAS/DV (designers only)

"Out of The Box Reports" by Ex Libris.

Unifying Analytics Objects

A unified approach towards analytics objects

"Scheduled report/dashboard" and "Widget" will no longer be separate objects, but act as optional features once a report was added as an object

Automated Report Properties

Report name, report type (OAS, dashboard, DV) and even Subject Area will be auto pulled from OAS and populated in Alma

Edit Report

Analytic Folder *
Alma/Acquisitions/Dashboar... ▾

Description
Acquisitions Dashboard ...

Object Creator
👤 Staff, Ex Libris

Report Name *
Acquisitions Dashboard ▾

Type
Dashboard

Object Creation Date
11/08/2021

Display Name *
Acquisitions Dashboard 2

Subject Areas
Funds Expenditure

Object Modification Date
28/07/2022

Reset   Save

New Object List: Immediate Preview of Report Information

- ✔ Object Creator
- ✔ Folder Path
- ✔ Object Creation date
- ✔ Subject Area
- ✔ Type
- ✔ Subscribed
- ✔ Scheduled

Easily Share, Easily Schedule

"Shared with me" list available for all users

Side by Side view

Quick link (permission limited)

Flexible Schedule component

Object List: Immediate Preview of Report Information

DV as Alma homepage: All in one place

Leading to a new approach on how to utilize data in the HEP platform!
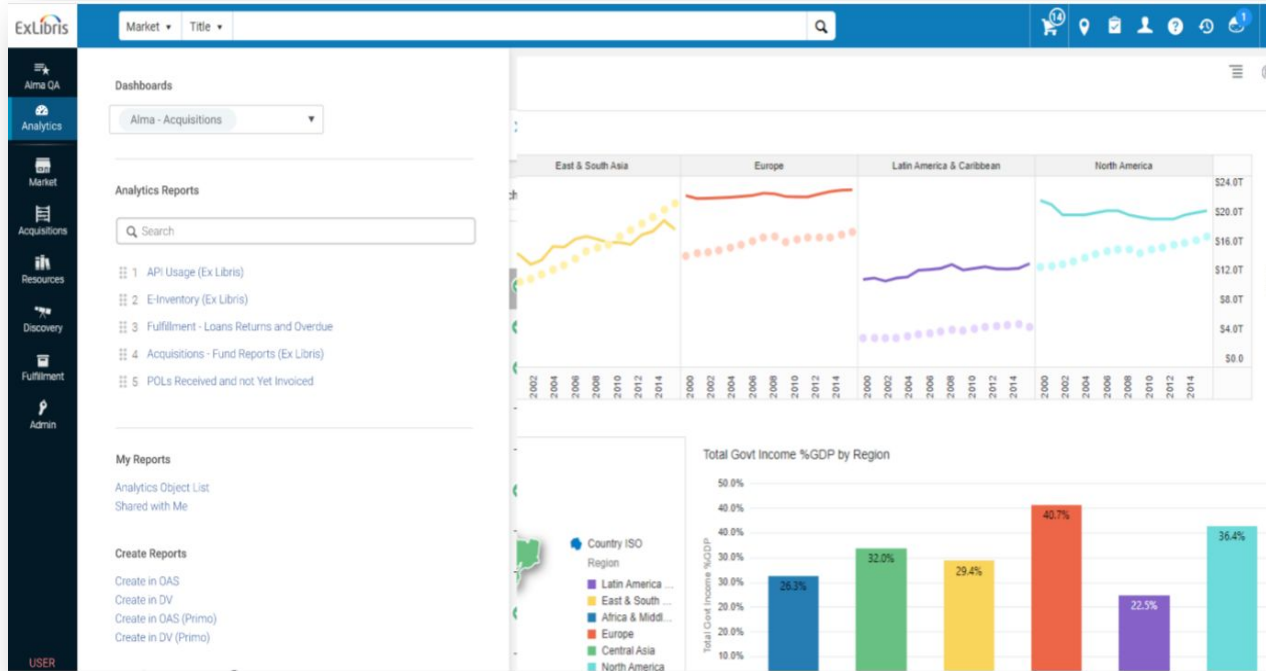
Easily customize the Alma dashboard to present DV projects by your choice.

Roll out Schedule:

November release

Users will need to actively "Opt-in" to use the new analytics.

- ✔ rich and informative Side by side view
- ✔ Classic OAS preview
- ✔ rich report information and filtering
- ✔ One time, one place: Widget and scheduling in one unified "analytics object"
- ✔ User level analytics sharing (in addition to role and profile sharing)
- ✔ DV as HEP homepage dashboard

February-May releases

February release: Users will need to actively "Opt-out" of the new Analytics UI to work on the old version

May release: The old Analytics UI will no longer be available.

✔ Report Live links (Platform users only): scheduled and immediate sharing of "Live links"

✔ DV preview in side-by-side view

✔ and more…

ExLibris.
Part of **Clarivate**

Thank you!

IGELU Conference
12th – 15th September 2022

ExLibris
Part of **Clarivate**

Appendix

ExLibris.
Part of **Clarivate**
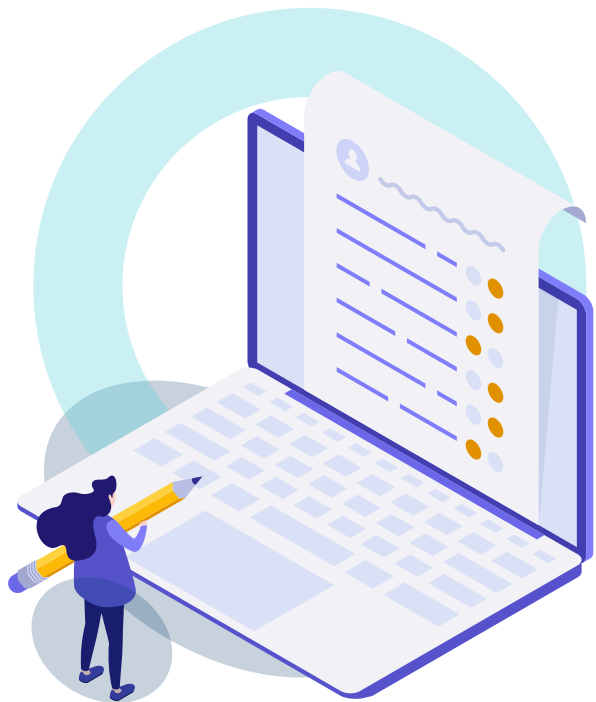
New Menu
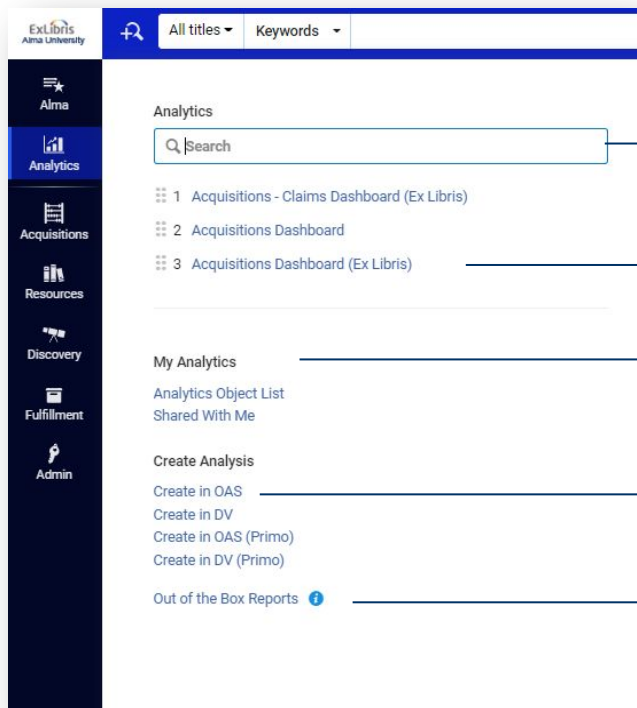
"Search" all "Analytics Objects" available (role/user dependent)

"Favorites Analytics" quick links defined by the user

"Analytics object list"-admins only, Analytics object management.
"Shared with me" – All user. Includes all objects shared with user/role

Create Analytics area for Analytics Designer

"Out of The Box Reports" created by Ex Libris. separated from institutional reports

New Object List: Immediate Preview of Report Properties

Inner search in object list with report properties as facets
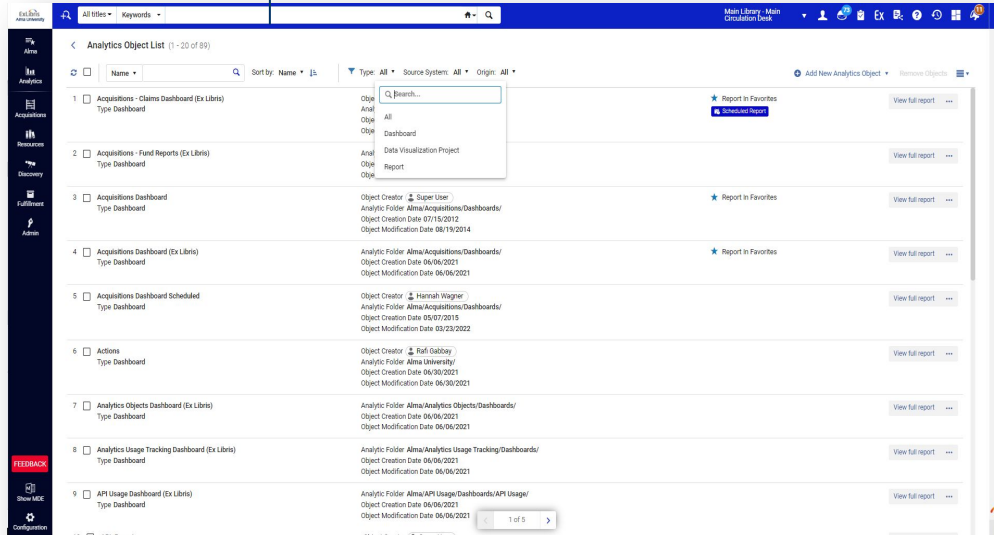
Properties

- ❑ Object Creator
- ❑ Folder Path
- ❑ Object Creation date
- ❑ Subject Area (November release)
- ❑ Type

Additional indications in the list

(colorful icons from November release):

- Subscribed
- Scheduled

ExLibris

Part of **Clarivate**

New Object List: Side By side View and Actions

Add Objects

Actions
- Remove
- Add/remove from favorites (from November release

Report properties
(Admin clicks on form to edit
See next page for more details)

Sharing options: Roles and profiles

Flexible Schedule component-
Admin clicks on form to edit,
Viewer has "View mode" only

Individual subscription to reports - available for both admin and viewer roles

Analytics Preview
(currently unavailable in PV)

Main Library - Main Circulation Desk

Type: All ▾   Source System: All ▾   Origin: All ▾   ⊕ Add New Analytics Object ▾   Remove Objects

Sections ▾   View full report   ...

Acquisitions - Claims Dashboard (Ex Libris)

Type Dashboard
Description Acquisitions - Claims Dashboard (Ex Libris)

Object Creator 👤 Rafi Gabbay
Analytic Folder /shared/Alma/Acquisitions/Dashboards/
Object Creation Date 06/06/2021
Object Modification Date 08/03/2022

Share With Roles (7)

User Administrator   User Manager   Fund-Ledger Viewer   License Manager   Purchase Request Manager   Trial Manager   Trial Operator

⊕ Add From Profiles

Schedule

☑ Schedule Report

Recurrence Pattern Weekly

◻ Subscribe

Format *
PDF ▾   ◻ FTP

Scheduled Report Notification

Report Preview

View full report

Scheduling

☑ Schedule report

✎ Edit Recurrence   ✕

Recurrence pattern
Weekly ▾

Recur every 1 ▾ week(s) on:
◻ Sunday   ☑ Monday   ◻ Tuesday   ◻ Wednesday   ◻ Thursday   ◻ Friday   ◻ Saturday

At
09:00 AM ▾

Cancel   Save

View full report (repeated in left panel list)

Unified Object (Object Type)

Unlike the old Analytics UI, the new Analytics UI takes a more unified approach towards analytics objects and does not consider "Scheduled report/dashboard" and "Widget" as separate objects. They all fall under the specific category they belong in Oracle Analytics Server. The scheduling and widget options depend on limitations that exist in OAS or in Analytics as shown below:

Alma homepage Dashboard* (phase 2: November or February release)	Live Link Schedule phase)*(Alma Users Only) 2: November or February (release	Widget	Schedule pdf/excel/Tex) (t/CSV	Object Type
NO	YES	YES	YES	Report (OAS)
NO	YES	NO	YES	Dashboard (OAS)
YES	YES	NO	NO	Data Visualization (DV)

"Add Analytics Object" form

Autofill- Folder search to locate reports (same as Old UI)

Auto fills from "Name but editable. Phase 2 will expected to pull Description from description in OAS if there is one

Auto filled. Cannot edit.

Name imported from OAS. Not editable

Display name refers only to the Object and does not affect OAS report. This field is auto filled but editable.

Auto fills Subject Area identified from OAS (not editable).
Available in November release

Edit Report ✕

Analytic Folder *
Alma/Acquisitions/Dashboar... ▾

Report Name *
Acquisitions Dashboard ▾

Display Name *
Acquisitions Dashboard 2

Description
Acquisitions Dashboard ...

Type
Dashboard

Subject Areas
Funds Expenditure

Object Creator
👤 Staff, Ex Libris

Object Creation Date
11/08/2021

Object Modification Date
28/07/2022

Reset   Save

ExLibris
Part of **Clarivate**