

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

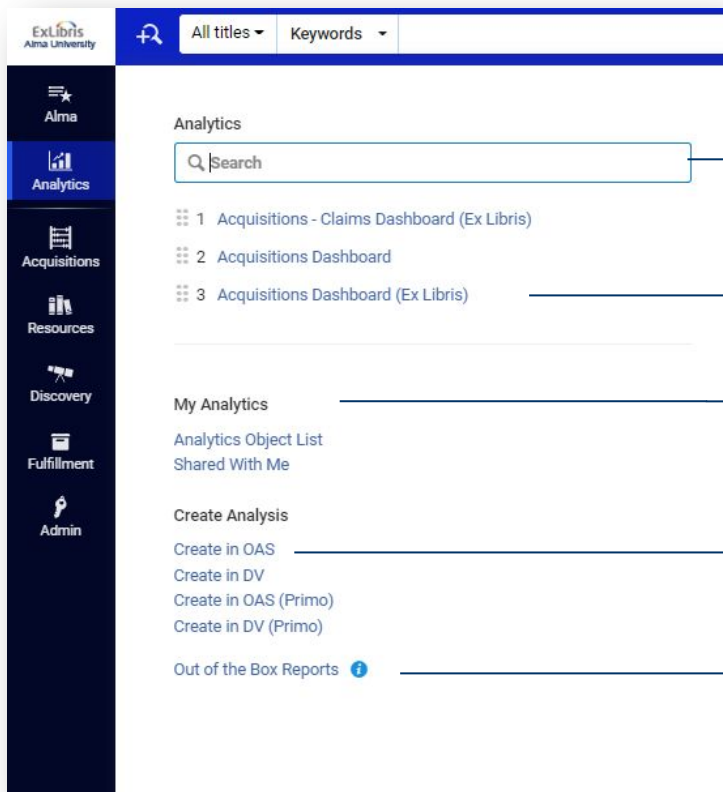
Alma Analytics Enhanced UI

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

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

Property	Value	Property	Value
Analytic Folder *	Alma/Acquisitions/Dashboar... ▼	Description	Acquisitions Dashboard ...
Report Name *	Acquisitions Dashboard ▼	Type	Dashboard
Display Name *	Acquisitions Dashboard 2	Subject Areas	Funds Expenditure
Object Creator	Staff, Ex Libris	Object Creation Date	11/08/2021
Object Modification Date	28/07/2022		

Reset Save

New Object List: Immediate Preview of Report Information

Analytics Object List (1 - 20 of 28)

The screenshot displays the 'Analytics Object List' interface. At the top, a search bar and filter controls are highlighted with a red box. The search bar contains the text 'Name'. To its right are filters for 'Sort by: Name', 'Type: All', 'Origin: All', and 'Subject Area: All'. Below the search bar, a table lists several objects. The first object is 'A - DV test 2' with a 'View full report' button. The second object is 'Acquisitions Dashboard 2' with a 'View full report' button. A detailed preview of the 'Acquisitions Dashboard' object is shown on the right, including its folder path, creation and modification dates, and a list of users with roles.

Name	Type	Subject Area	Origin	Subject Area
A - DV test 2	Type Data Visualization Project	Subject Areas Course Reserves, Titles	Staff, Ex Libris	All
Acquisitions Dashboard 2	Analytic Folder	Alma/Acquisitions/Dashboards/	Staff, Ex Libris	All

Object Details:
Analytic Folder /shared/Alma/Acquisitions/Dashboards/
Object created by Staff, Ex Libris on 11/08/2021
Object modified by analytics_designer, analytics_des... on 28/07/2022

Users:
Purchasing Operator, Purchasing Manager, Acquisitions Administrator, General System Administrator, Designs Analytics, Analytics Administrator

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

Easily Share, Easily Schedule

“Shared with me” list available for all users

The screenshot displays the ExLibris Alma QA interface. At the top, there is a search bar with 'All titles' and 'Keywords' filters, and a navigation bar for 'Main Library - Main Circulation Desk'. The main content area is titled 'Analytics Object List (1 - 20 of 89)'. A red box highlights the 'Shared With Me' filter. Below this, a list of 12 dashboard reports is shown, including 'Acquisitions - Claims Dashboard (Ex Libris)', 'Acquisitions - Fund Reports (Ex Libris)', and 'API Usage Dashboard (Ex Libris)'. A red box highlights the 'Report URL www.analyticsreportsurl.com' with a share icon. Below the URL, there is a 'Share With Roles (7)' section with buttons for 'User Administrator', 'User Manager', 'Fund-Ledger Viewer', 'License Manager', 'Purchase Request Manager', 'Trial Manager', and 'Trial Operator'. At the bottom, a 'Schedule' modal is open, showing 'Edit Recurrence' settings for a 'Weekly' report, with options to 'Recur every 1 week(s) on: Monday' and 'At 09:00 AM'. The modal has 'Cancel' and 'Save' buttons.

Side by Side view

Quick link (permission limited)

Flexible Schedule component

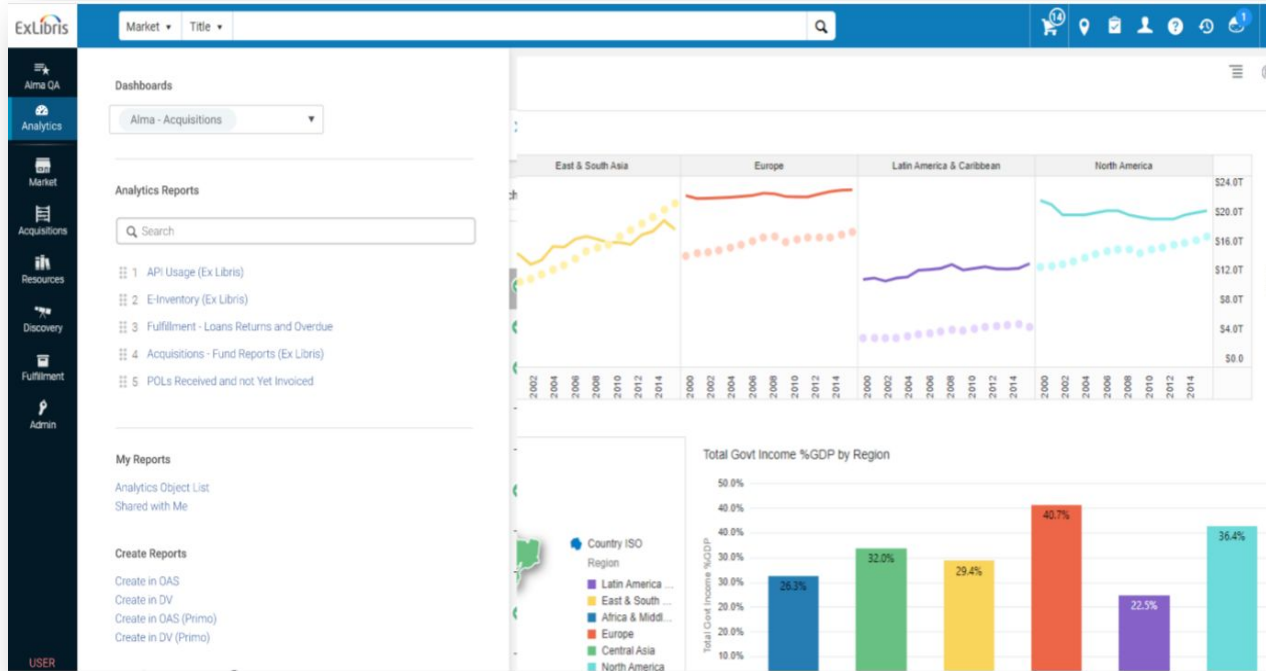
Object List: Immediate Preview of Report Information

The screenshot displays the ExLibris Analytics reports interface. The top navigation bar includes the ExLibris logo, a search bar with 'Market' and 'Title' filters, and a user profile icon. The main content area shows a list of reports under the heading 'Analytics reports (1 - 20 of 253)'. The first report is highlighted with a red box. The report details are as follows:

Report Name	Sort by	Type	Subject Area	Permission	Actions
<input type="checkbox"/> Report name Subject Area Analytics Objects Type OAS Report	Modification Date	All	All	All	Remove Reports Add New Analytics Object
<input type="checkbox"/> Report name Subject Area Analytics Objects Type OAS Report	Creation date 02/02/2020 Modification date 02/02/2020				
<input type="checkbox"/> Dashboard name Subject Area Analytics Objects Type OAS Dashboard	Creator John Smith Analytics folder Location/Location/Location Creation date 02/02/2020 Modification date 02/02/2020				★ Report in favorites View full report ...
<input type="checkbox"/> Project name Subject Area Analytics Objects Type Data Visualization	Creator John Smith Analytics folder Location/Location/Location Creation date 02/02/2020 Modification date 02/02/2020				★ Report in favorites View full report ...
<input type="checkbox"/> Report name Subject Area Analytics Objects Type OAS Report	Creator John Smith Analytics folder Location/Location/Location Creation date 02/02/2020 Modification date 02/02/2020				★ Report in favorites View full report ...
<input type="checkbox"/> Dashboard name Subject Area Analytics Objects	Creator John Smith Analytics folder Location/Location/Location				★ Report in favorites View full report ...

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

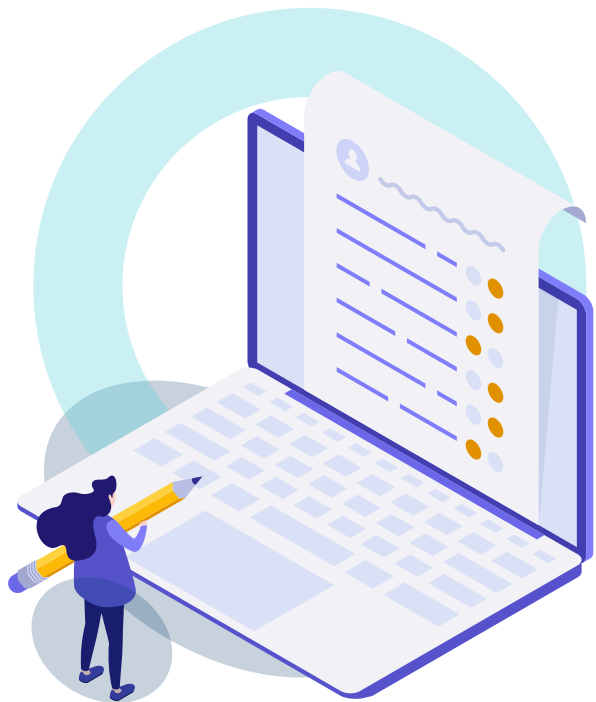
May release: The old Analytics UI will no longer be available.

- ✓ Report Live links (Platform users only): scheduled and immediate sharing of “Live links”
- ✓ DV preview in side-by-side view
- ✓ and more...



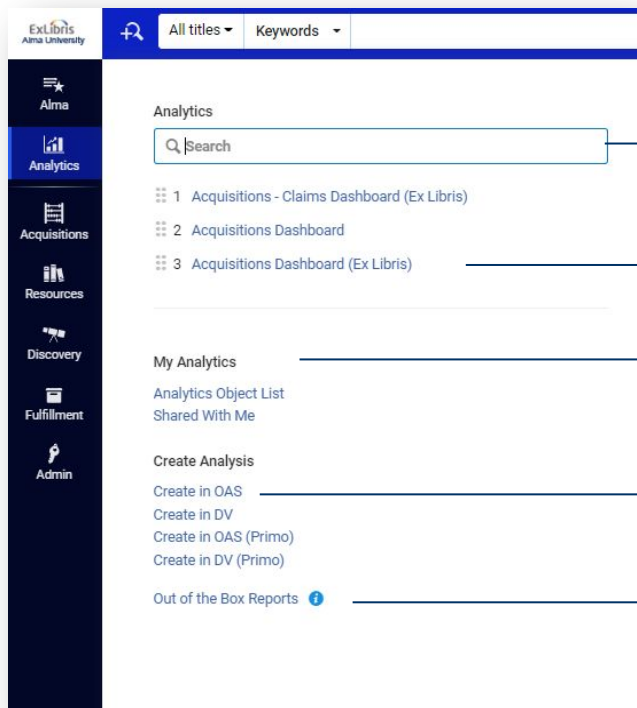
Thank you!





Appendix

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.

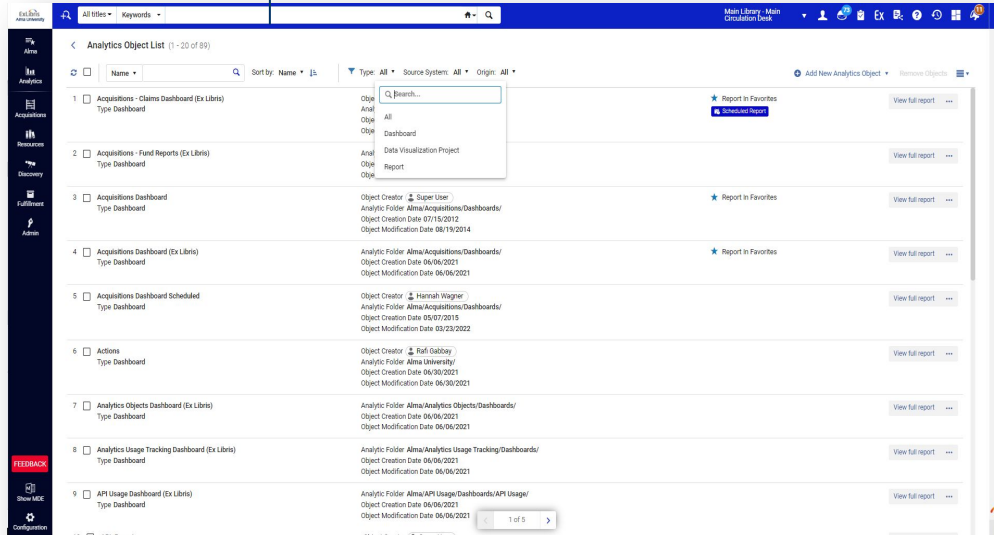
"Shared with me" – All user. Includes all objects shared with user/role

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

New Object List: Side By side View and Actions

The screenshot displays the Alma system interface for configuring a report. The main content area is titled "Acquisitions - Claims Dashboard (Ex Libris)". It includes a "Share With Roles (7)" section with roles like "User Administrator", "User Manager", "Fund-Ledger Viewer", "License Manager", "Purchase Request Manager", "Trial Manager", and "Trial Operator". Below this is a "Schedule" section with a "Schedule Report" checkbox and a "Recurrence Pattern Weekly" dropdown. A "Scheduling" dialog box is open, showing "Edit Recurrence" options, including "Recurrence pattern Weekly", "Recur every 1 week(s) on", and "At 09:00 AM". The interface also features a top navigation bar, a search bar, and a sidebar with filters.

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)

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/Text/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

The screenshot shows a web form titled "Edit Report" with a close button (X) in the top right corner. The form contains several fields:

- Analytic Folder ***: A dropdown menu with the value "Alma/Acquisitions/Dashboar...".
- Report Name ***: A dropdown menu with the value "Acquisitions Dashboard".
- Display Name ***: A text input field with the value "Acquisitions Dashboard 2".
- Description**: A text input field with the value "Acquisitions Dashboard ...".
- Type**: A dropdown menu with the value "Dashboard".
- Subject Areas**: A dropdown menu with the value "Funds Expenditure".

On the right side of the form, there is a separate box containing:

- Object Creator**: A dropdown menu with the value "Staff, Ex Libris".
- Object Creation Date**: A text input field with the value "11/08/2021".
- Object Modification Date**: A text input field with the value "28/07/2022".

At the bottom right of the form, there are two buttons: "Reset" and "Save".