



# A scheduled report from an Alma Analytics report for Alma and non-Alma users

Explanation and Live Demonstration

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Introduction

Creating an analytics object

Subscribing to and  
receiving the scheduled  
report



# Introduction

## Introduction

- There may be cases where the library has created a useful report, chart or graph in Alma analytics and certain librarians, or other staff of the institution which are not registered Alma users, will want to receive it as an email attachment on a regular basis
- This may be done by creating a scheduled report
- After the scheduled report is created
  - Each librarian can choose to subscribe to the report depending on his or her roles.
  - The analytics administrator can define that the report will be sent to any email
    - even for people not registered as Alma users

## Introduction

- In this presentation we will show an example using the following report:
- Name: "Count of Loans and Renewals in current year"
- Directory location: " Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects"

## Introduction

- This is the report which we want to send as a scheduled report:

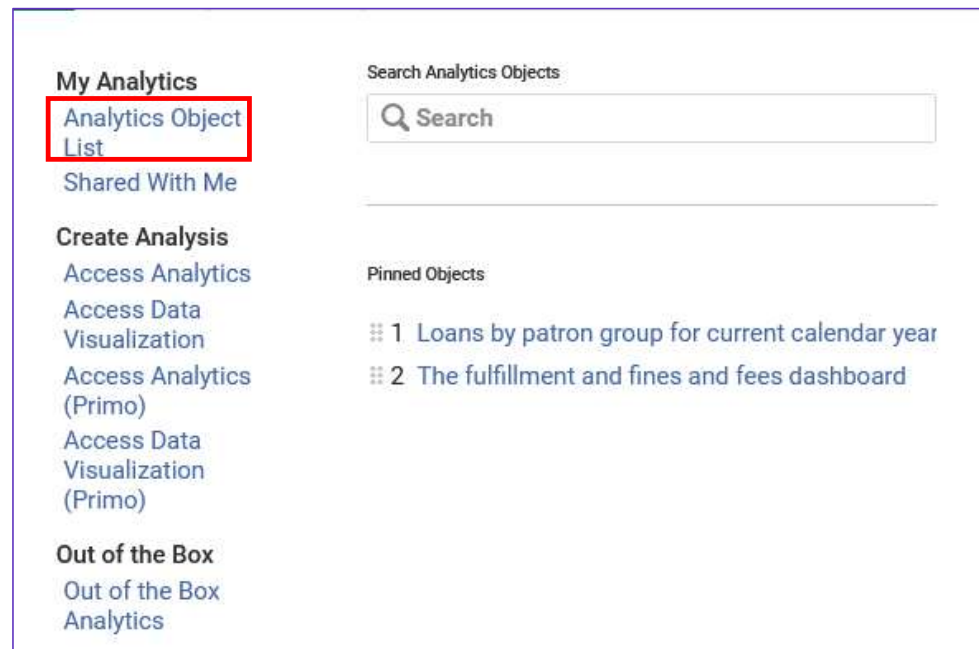
User Group ▲▼	Loans (Not In House)	Renewals
Administrative Staff	410	74
Alumni	121	3
Faculty	189	49
Graduate Student	289	38
Undergraduate Student	1,619	207



# Creating an analytics object

## Creating an analytics object

- Select “Analytics > My Analytics > Analytics Objects List”

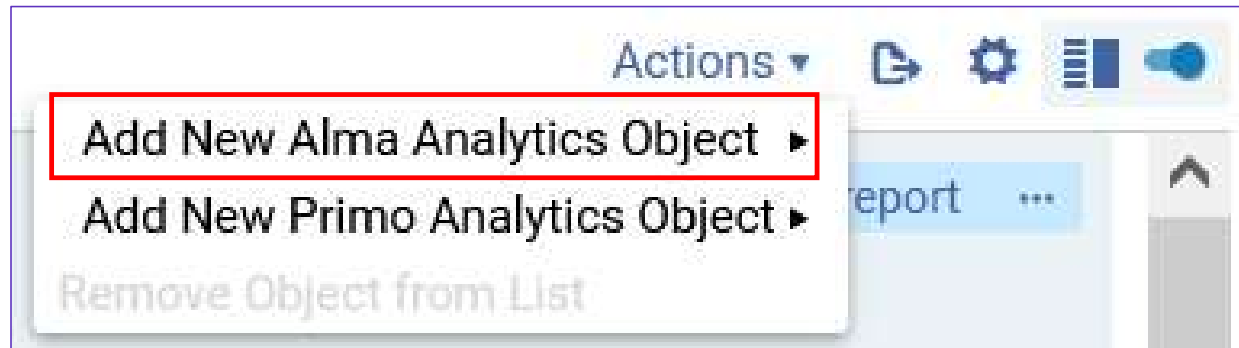


The screenshot shows a web interface for managing analytics objects. On the left, under the heading "My Analytics", the "Analytics Object List" link is highlighted with a red box. Below it are "Shared With Me", "Create Analysis", and "Out of the Box" sections. The "Create Analysis" section lists "Access Analytics" and "Access Data Visualization" for both "Primo" and "Primo". The "Out of the Box" section lists "Out of the Box Analytics". On the right, there is a "Search Analytics Objects" section with a search input field containing the text "Search". Below that is a "Pinned Objects" section with two items: "1 Loans by patron group for current calendar year" and "2 The fulfillment and fines and fees dashboard".



## Creating an analytics object

- Then we will choose (on the top right) “Actions > Add New Analytics Object”



## Creating an analytics object

- Choose the folder and report. Optionally update the display name.

Count of Loans and Renewals in current year

Type Report

Subject Areas Fulfillment

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7FA7E66A35>

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects

Object created by Alicia Chen on 04/08/2023 12:44

Object modified by Alicia Chen on 04/08/2023 12:44

Folder and name of the report we saw a few moments ago

## Creating an analytics object

- In the “Schedule” section:

1. Toggle the ‘Schedule Report’ to be active
2. Select the desired Recurrence Pattern
3. Select whether it should be sent as a link or attachment or via FTP
4. Select desired format

## Creating an analytics object

- In the "Schedule" section:

The screenshot shows a 'Schedule' section with the following elements and callouts:


- Toggle:** A blue toggle switch labeled 'Schedule Report' is turned on. Callout: "Toggle the 'Schedule Report' to be active".
- Recurrence Pattern:** A dropdown menu is set to 'Weekly'. Callout: "Select the desired Recurrence Pattern".
- Frequency:** The text 'Every Monday At 09:00' is displayed.
- Delivery option:** A radio button is selected for 'Attachment'. Callout: "Select whether it should be sent as a link or attachment or via FTP".
- Format:** The text 'Format PDF' is displayed. Callout: "Select desired format".
- FTP option:** An unchecked radio button is labeled 'FTP'.

## Creating an analytics object

- If you would like to add non-Alma users to receive the scheduled report:
  1. Click “Manage Subscription” in the “schedule” section.
  2. Click “Add Row”
  3. Add the email of the non-Alma user in the “Preferred Email” field

# Creating an analytics object

Schedule ^

 Schedule Report

Recurrence Pattern **Weekly** Every Monday At 09:00

Delivery option **Attachment**  FTP

Subscribe to the analytics object

**+ Manage Subscription**

## Creating an analytics object

Subscribers



[+ Add Row](#)


No records were found.

**Add Row**

User  Preferred Email

Subscribers

[+ Add Row](#)  

↕User	↕Preferred Email	↕Updated By	↕Last Updated	
1 -	<input type="text" value="jimmy.smith@university.edu"/>	AliciaC613	-	

## Creating an analytics object

- Add the roles of the users who will be able to “subscribe” to this scheduled report.
- In our case, because the report deals with fulfillment, it would be relevant to add fulfillment roles (and not for example physical electronic inventory roles)
- In the “Share” section, “Roles” subsection, click “Add Roles”
- Add the desired roles



## Creating an analytics object

Summary

Share

Schedule

Report Preview

Share

Internal Users

+ Add Users

Roles

+ Add Roles

+ Add From Profiles

# Creating an analytics object

Roles

Fulfillment Services Manager x Fulfillment Services Operator x Fulfillment Administrator x

Q Select a value

+ Add From Profiles

✓ X



# Subscribing to and receiving the scheduled report

## Subscribing to and receiving the scheduled report

- Alma users with at least one of the relevant roles defined in the scheduled report can be subscribed to the scheduled report.

User Roles

1 - 5 of 5

Filter: All

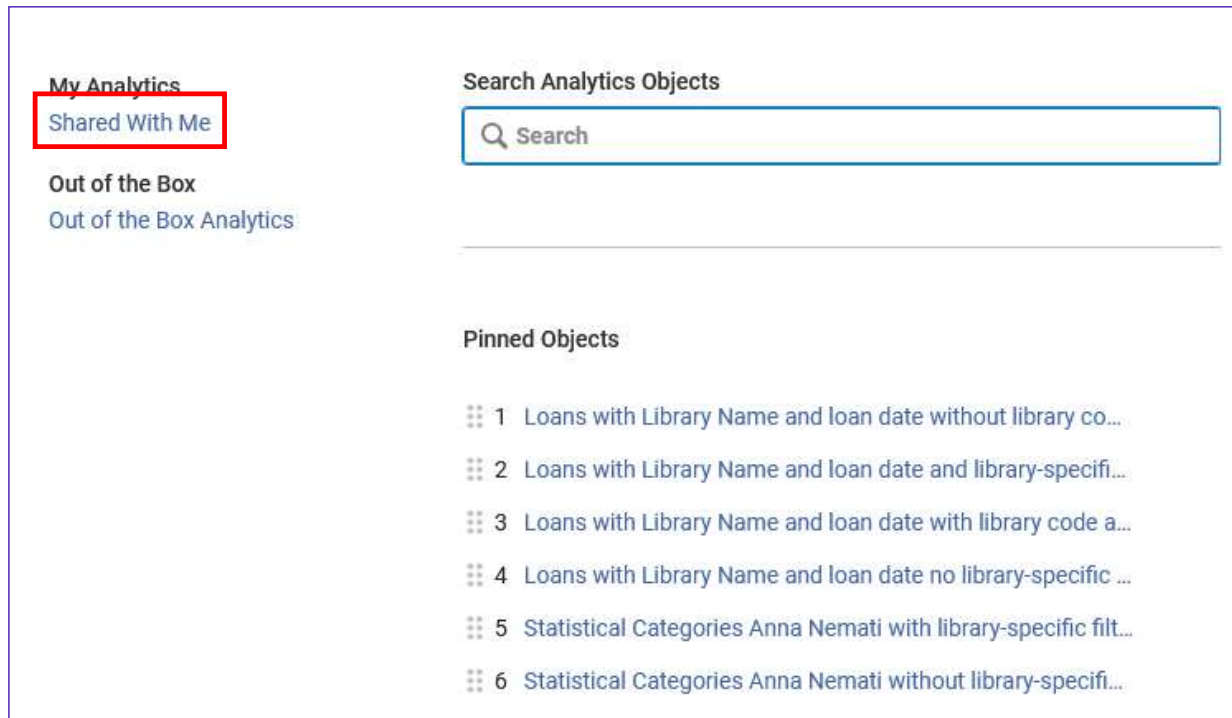
+ Add Role + Add from Profiles - Remove Selected

	Active	Role Name	Role Area			Status Date	
1	<input checked="" type="checkbox"/>	Fulfillment Administrator	Fulfillment	Alma University	-	05/03/2023	...
2	<input checked="" type="checkbox"/>	Fulfillment Services Manager	Fulfillment	Alma University	-	05/03/2023	...
3	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Alma University	-	05/03/2023	...
4	<input checked="" type="checkbox"/>	Library Level Analytics consumer	Miscellaneous	Art Library	-	05/03/2023	...
5	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	28/04/2017	...

User 'Aaron Hacoheh' has at least one of the relevant roles.

## Subscribing to and receiving the scheduled report

- User 'Aaron Hacoen' logs in and does "Analytics > My Analytics > Shared With Me"



The screenshot displays the 'My Analytics' section of a web application. On the left, there is a navigation menu with the following items: 'My Analytics' (highlighted with a red box), 'Shared With Me' (highlighted with a red box), 'Out of the Box', and 'Out of the Box Analytics'. To the right, there is a search bar labeled 'Search Analytics Objects' with a magnifying glass icon and the text 'Search'. Below the search bar, there is a section titled 'Pinned Objects' containing a list of six items, each with a grid icon and a truncated title:

- 1 Loans with Library Name and loan date without library co...
- 2 Loans with Library Name and loan date and library-specifi...
- 3 Loans with Library Name and loan date with library code a...
- 4 Loans with Library Name and loan date no library-specific ...
- 5 Statistical Categories Anna Nemati with library-specific filt...
- 6 Statistical Categories Anna Nemati without library-specifi...

## Subscribing to and receiving the scheduled report

- The “Shared With Me” shows all analytics objects which have at least one role which the logged in user has.
- The logged in user can then click on the object to open it

The screenshot shows a web interface for analytics. At the top, there is a navigation bar with a back arrow, the text 'Shared With Me (1 - 20 of 23)', and a search bar. Below the search bar, there are filters for 'Sort by: Object Creation Date', 'Type: All', 'Source System: All', 'Badges: All', and 'Subject Area: All'. The main content area displays a report card for 'Count of Loans and Renewals in current year'. The report card includes the following information: 'Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports Objects', 'Type Report', 'Subject Areas Fulfillment', 'Object created by Alicia Chen on 04/08/2023', and 'Object modified by Alicia Chen on 04/08/2023'. There are also icons for 'Scheduled Report' and 'Pin to Analytics Menu'.

## Subscribing to and receiving the scheduled report

- Then the logged in user will subscribe to the report

The screenshot displays the configuration page for an analytics report. The report title is "Count of Loans and Renewals in current year". The configuration includes the following details:

- Report Information:**
  - Type Report: Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics /Reports Objects
  - Subject Areas Fulfillment
  - Report URL: <https://eu00.alma.exlibrisgroup.com/ng/hashed/C53A90E40DB397B5D554B4568A4F7B7FA7E66A35>
  - Object created by: Alicia Chen on 04/08/2023 12:44
  - Object modified by: on 04/08/2023 14:02
- Schedule:**
  - Recurrence Pattern Weekly
  - Every Monday At 09:00
- Delivery option Attachment:**
  - Format PDF
  - FTP

A red box highlights the "Subscribe to the analytics object" button at the bottom left of the configuration area.

## Subscribing to and receiving the scheduled report

- There is a clear indication to the user that he or she is subscribed.



The screenshot shows a user interface for managing reports. At the top, there is a navigation bar with a back arrow, the text "Shared With Me (1 - 20 of 23)", a search box, and several filter dropdowns: "Sort by: Object Creation Date", "Type: All", "Source System: All", "Badges: All", and "Subject Area: All". On the right side of the navigation bar are icons for share, settings, list, and notifications.

The main content area displays a single report item:

- 1** Count of Loans and Renewals in current year
- Type Report
- Subject Areas Fulfillment

Metadata for the report:

- Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Reports
- Objects
- Object created by Alicia Chen on 04/08/2023
- Object modified by Aaron Hacohen on 04/08/2023

On the right side of the report card, there are two status indicators:

- Subscribed (indicated by a red arrow pointing to it)
- Scheduled Report

A "Pin to Analytics Menu" button is located on the far right of the report card.



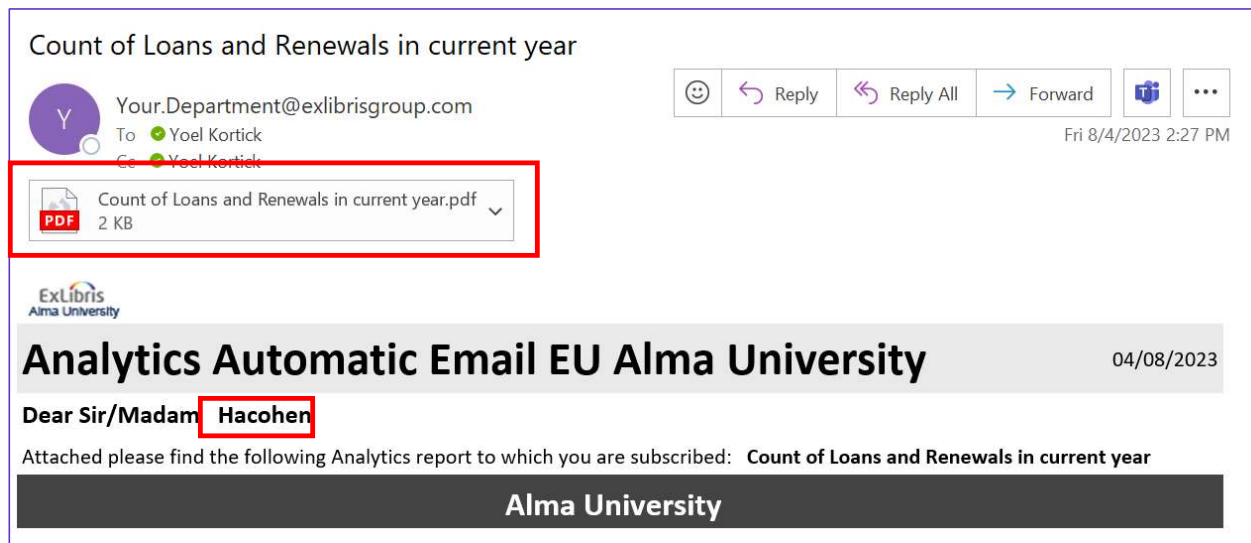
## Subscribing to and receiving the scheduled report

- The scheduled job which sends the scheduled reports runs and completes.

◆ Name	◆ Process ID	◆ Job Category	◆ Status	◆ Start Date	◆ End Date
1 <a href="#">Schedule of Analytics reports and dashboards - Count of Loans and Renewals in current year</a>	75615880500...	Analytics	✔ Completed Successfully	04/08/2023 13:17	04/08/2023 13:17

## Subscribing to and receiving the scheduled report

- The user gets the email with the attachment.



The screenshot displays an email interface. At the top, the subject is "Count of Loans and Renewals in current year". The sender is "Your.Department@exlibrisgroup.com". The recipient list includes "To: Yoel Kortick" and "Cc: Yoel Kortick". Action buttons for "Reply", "Reply All", "Forward", and a calendar icon are visible. The date and time are "Fri 8/4/2023 2:27 PM". A red box highlights an attachment: "Count of Loans and Renewals in current year.pdf" (2 KB). Below the attachment, the ExLibris Alma University logo is shown. The main header reads "Analytics Automatic Email EU Alma University" with the date "04/08/2023". The salutation is "Dear Sir/Madam Hacoheh", where "Hacoheh" is highlighted with a red box. The body text says "Attached please find the following Analytics report to which you are subscribed: Count of Loans and Renewals in current year". At the bottom, a dark grey bar contains the text "Alma University".

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**IGOLU**  
*International Group of Ex Libris Users*

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