



# Create a widget from an Alma Analytics report and add it to the Alma homepage

Explanation and Live Demonstration

Yoel Kortick  
Senior Librarian

Introduction

Creating an analytics object

Adding the widget to the  
Alma homepage



# Introduction

## Introduction

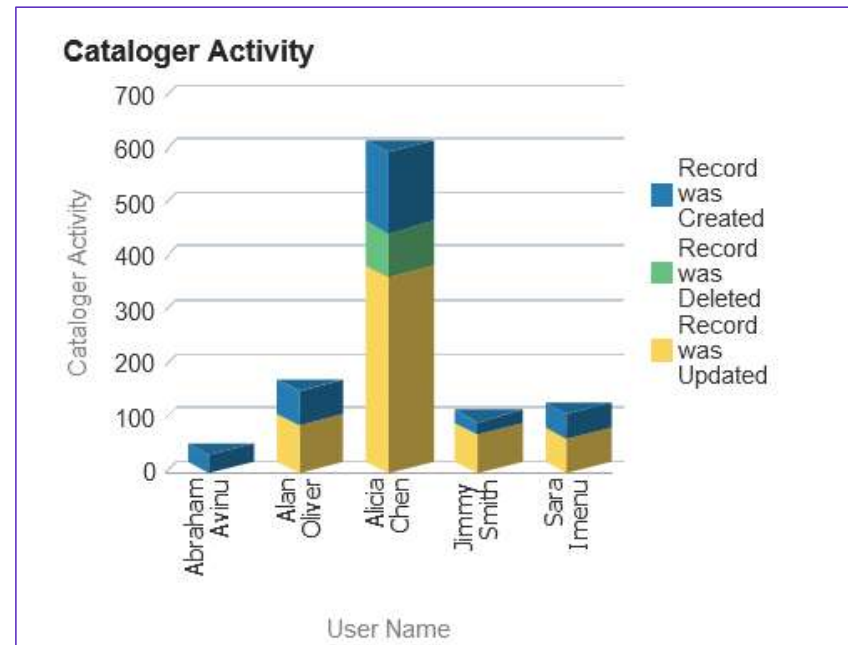
- There may be cases where the library has created a useful chart or graph in Alma analytics and certain librarians will want to add it to their Alma homepage
- This may be done by creating an Analytics object of type Widget
- After the widget is created
  - Each librarian can choose to add the widget to his or her Alma homepage depending on his or her roles.

## Introduction

- In this presentation we will show an example using the following Analytics report:
- Name: "Cataloger Activity"
- Directory location: /shared/Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets"

## Introduction

- This is the report which we want to create as a widget:

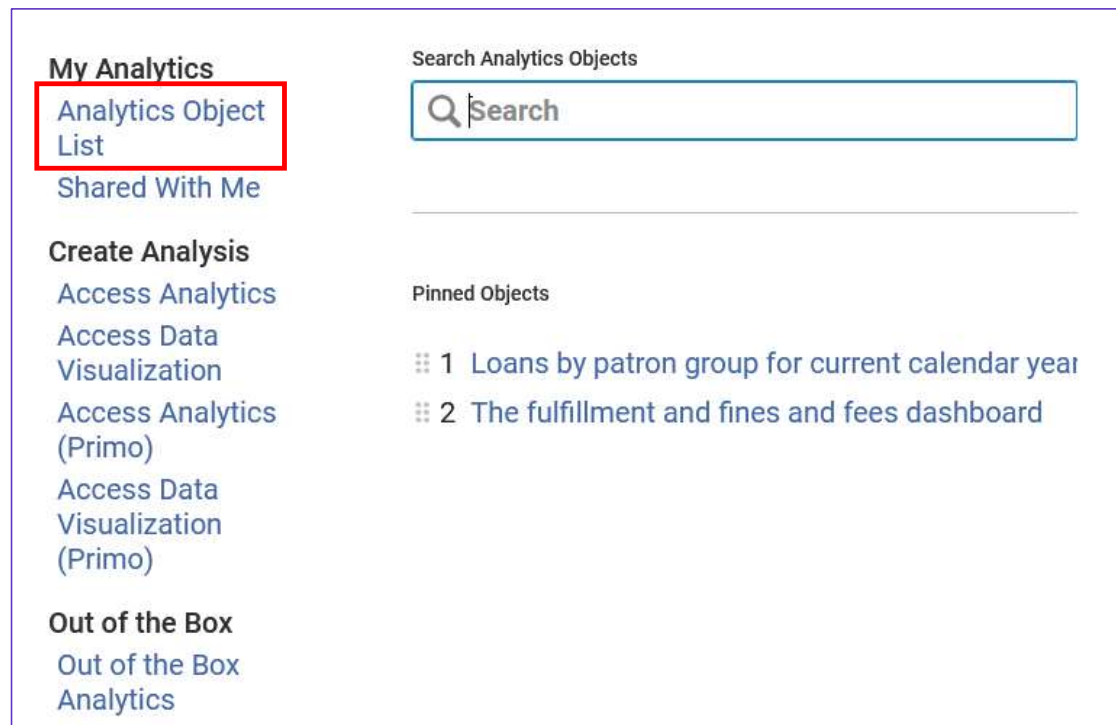




# Creating an analytics object

## Creating an analytics object

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



The screenshot displays the 'My Analytics' dashboard. On the left, a navigation menu is visible with the following sections:

- My Analytics**
  - Analytics Object List** (highlighted with a red box)
  - Shared With Me
- Create Analysis**
  - Access Analytics
  - Access Data Visualization
  - Access Analytics (Primo)
  - Access Data Visualization (Primo)
- Out of the Box**
  - Out of the Box Analytics

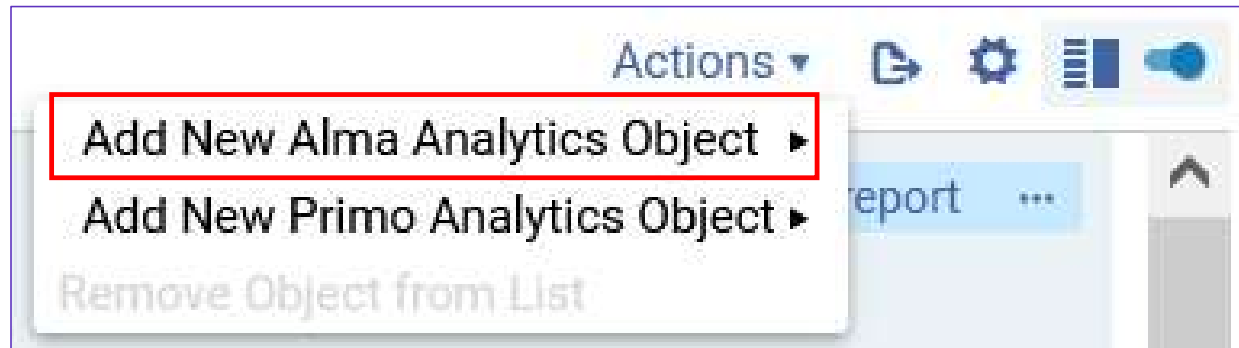
On the right side of the dashboard, there is a search bar labeled 'Search Analytics Objects' with a magnifying glass icon and the text 'Search'. Below the search bar, there is a section titled 'Pinned Objects' containing two items:

- 1 Loans by patron group for current calendar year
- 2 The fulfillment and fines and fees dashboard



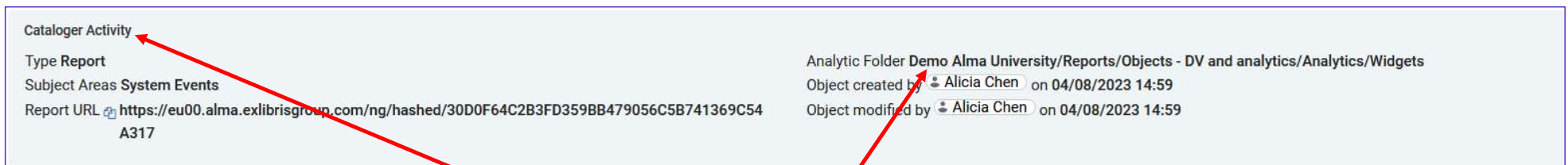
## Creating an analytics object

- 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.



The screenshot shows a configuration interface for an analytics object. On the left, there are fields for 'Cataloger Activity', 'Type Report', 'Subject Areas System Events', and 'Report URL'. On the right, there are fields for 'Analytic Folder', 'Object created by', and 'Object modified by'. Two red arrows originate from a central text box below: one points to the 'Type Report' field and the other points to the 'Analytic Folder' field.

Cataloger Activity	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/Analytics/Widgets
Type Report	Object created by Alicia Chen on 04/08/2023 14:59
Subject Areas System Events	Object modified by Alicia Chen on 04/08/2023 14:59
Report URL <a href="https://eu00.alma.exlibrisgroup.com/ng/hashed/30D0F64C2B3FD359BB479056C5B741369C54">https://eu00.alma.exlibrisgroup.com/ng/hashed/30D0F64C2B3FD359BB479056C5B741369C54</a>	
A317	

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

## Creating an analytics object

- In the “Report Preview” section check the box “Add as widget”

Summary

Share

Schedule

**Report Preview**

Internal Users

- + Add Users

Roles

- + Add Roles
- + Add From Profiles

Schedule

Schedule Report

Report Preview

[View full report](#)

Add as widget

Cataloger Activity

Cataloger Activity

User Name

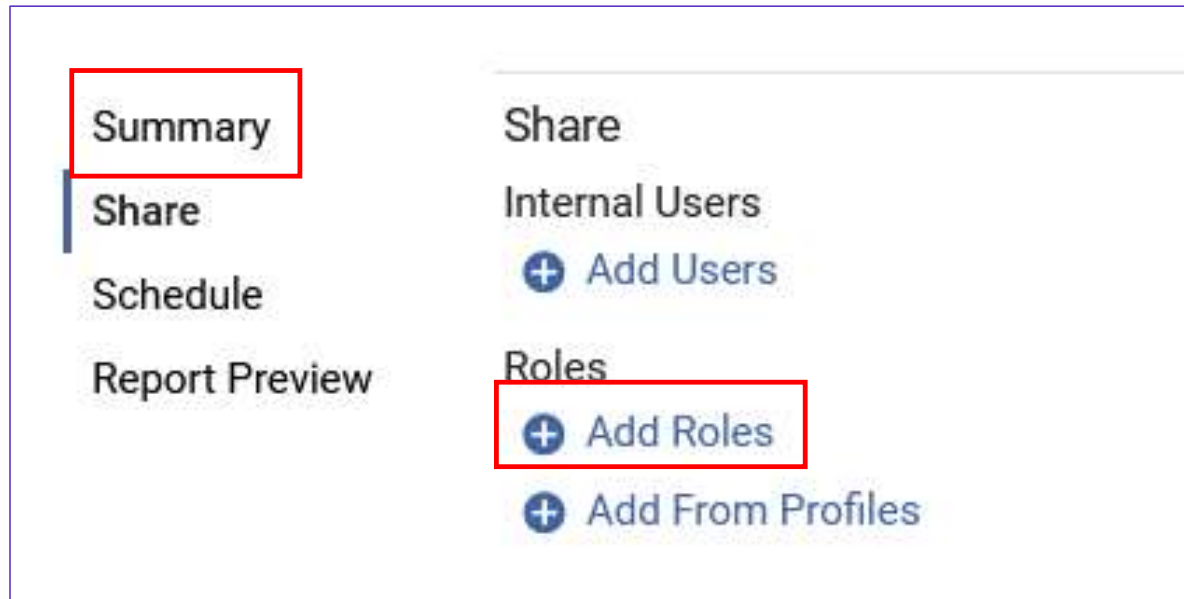
Record was Created  
Record was Deleted  
Record was Updated

User Name	Record was Created	Record was Deleted	Record was Updated
Abraham Avinu	50	0	0
Alan Oliver	100	0	0
Alicia Chen	100	100	400
Jimmy Smith	50	0	50
Sare Jimenu	50	0	50

## Creating an analytics object

- Add the roles of the users who will be able to add this widget to their Alma homepage.
- In our case, because the report deals with cataloging, it would be relevant to add cataloging roles (and not for example fulfillment roles)
- In the "Share" section, "Roles" subsection, click "Add Roles"
- Add the desired roles

## Creating an analytics object



# Creating an analytics object

Share

Internal Users

+ Add Users

Roles

Cataloger x Catalog Administrator x Catalog Manager x Cataloger Extended x

Select a value

+ Add From Profiles

✓ X



# **Adding the widget to the Alma homepage**

## Adding the widget to the Alma homepage

- Alma users with at least one of the relevant roles defined in the scheduled report can add the widget top the Alma Homepage.

User Roles

1 - 2 of 2

Filter: All

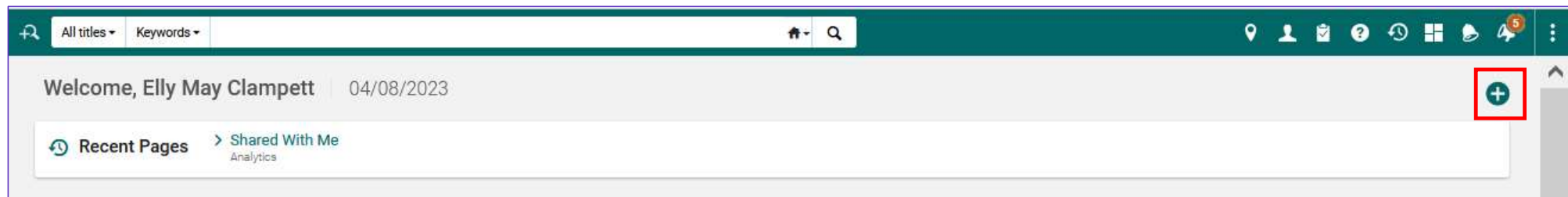
	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1	<input checked="" type="checkbox"/>	Cataloger	Catalog	Alma University	-	04/08/2023	...
2	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	05/08/2021	...

User 'Elly May Clampett' has at least one of the relevant roles.



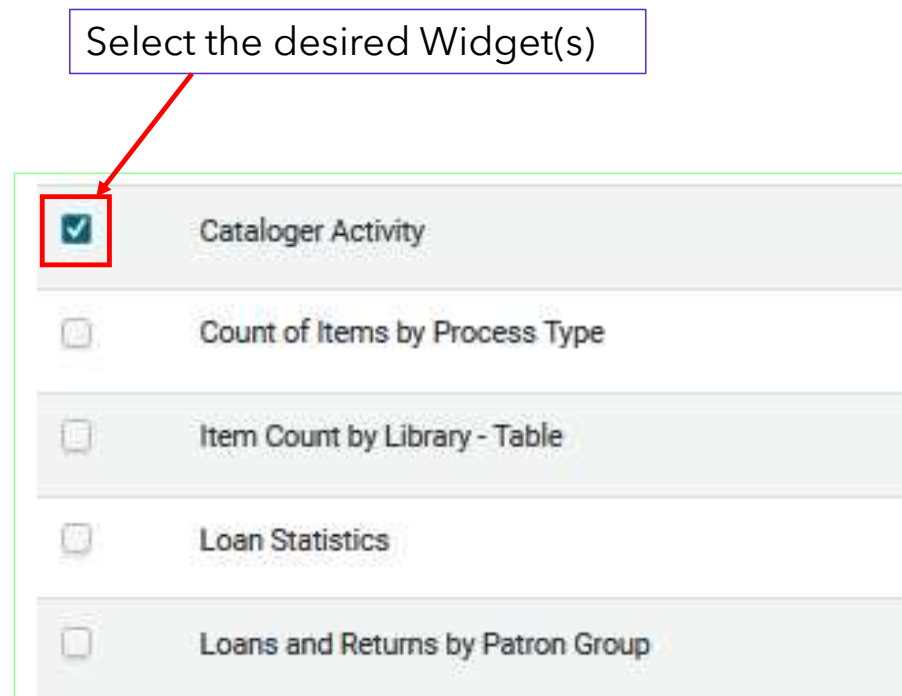
## Adding the widget to the Alma homepage

- User 'Elly May Clampett' logs in and clicks the + sign on the top right



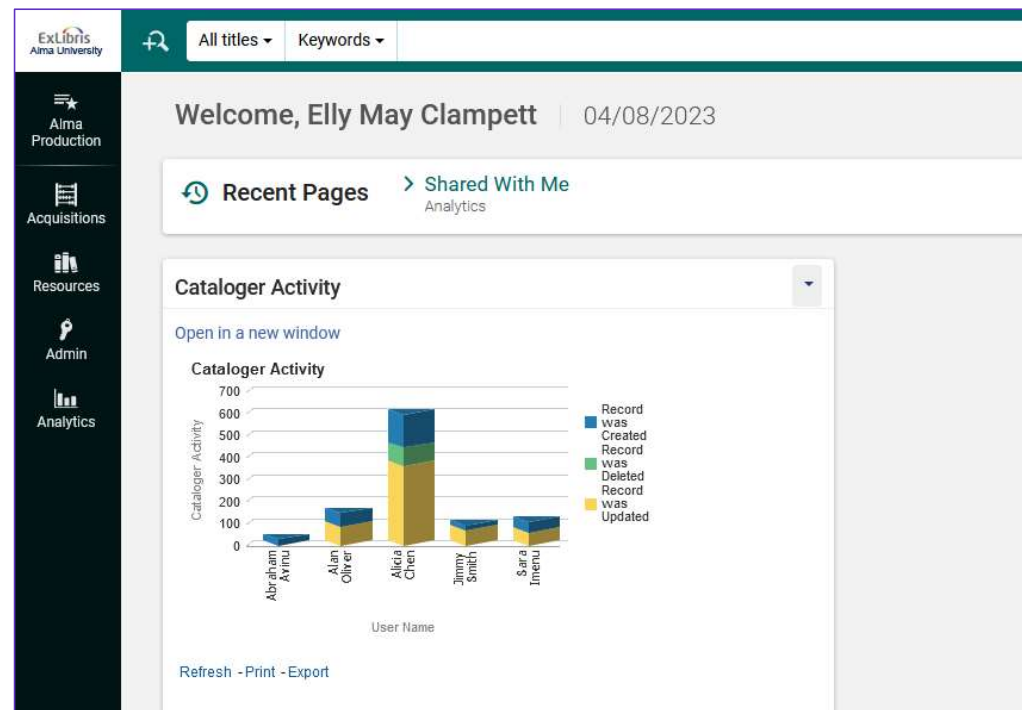
## Adding the widget to the Alma homepage

- The “Manage Widgets” screens opens and shows all widgets which have at least one role which the logged in user has.



## Adding the widget to the Alma homepage

- The widget is added to the Alma homepage



**EXLIBRIS**  
Part of **Clarivate**

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

**Yoel Kortick**  
[Yoel.Kortick@clarivate.com](mailto:Yoel.Kortick@clarivate.com)

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