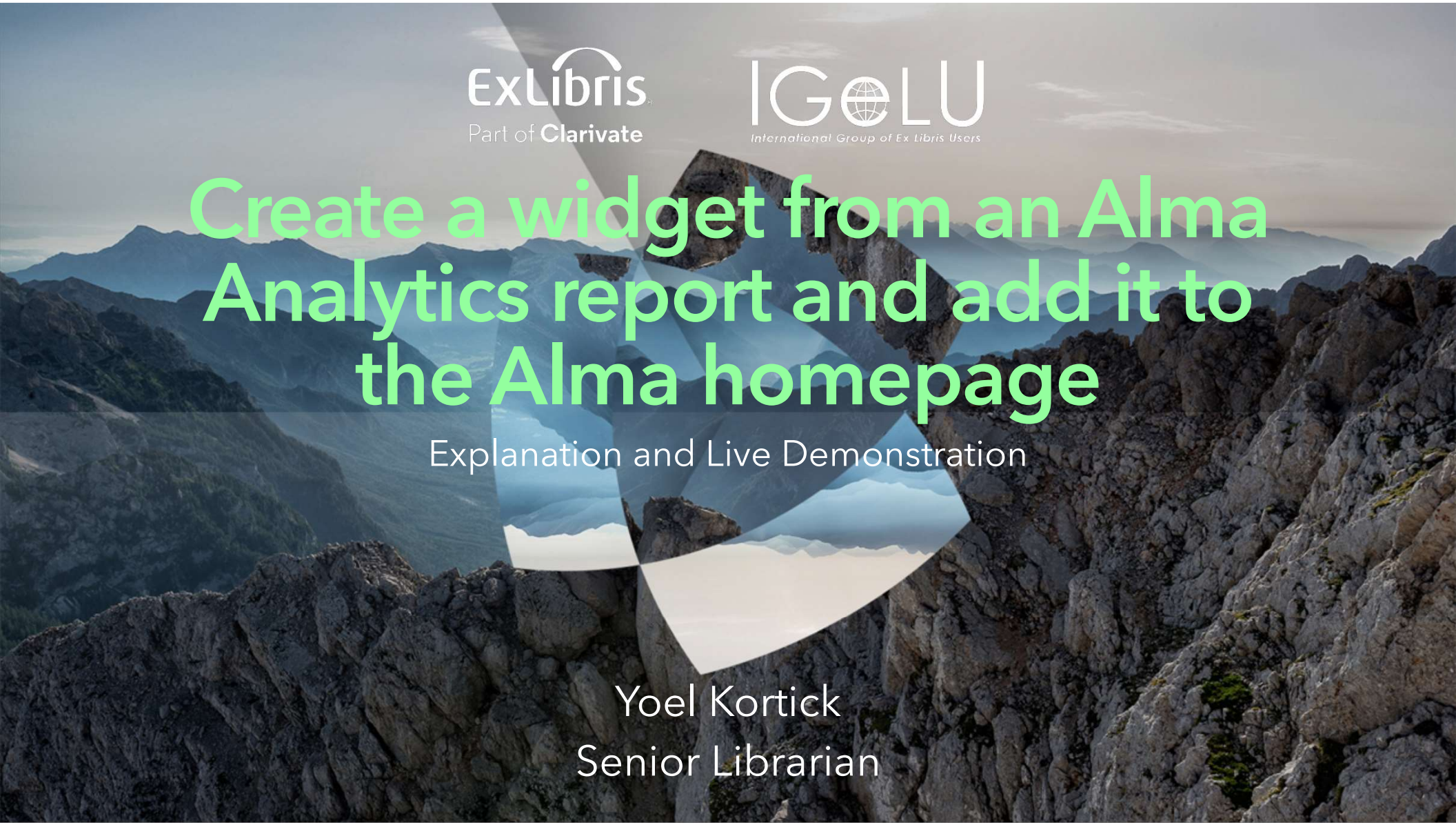


Create a widget from an Alma Analytics report and add it to the Alma homepage

Explanation and Live Demonstration

Yoel Kortick
Senior Librarian

Introduction

Creating an analytics object

Adding the widget to the Alma homepage

ExLibris Part of Clarivate

IGeLU International Group of Ex Libris Users

Introduction

Introduction

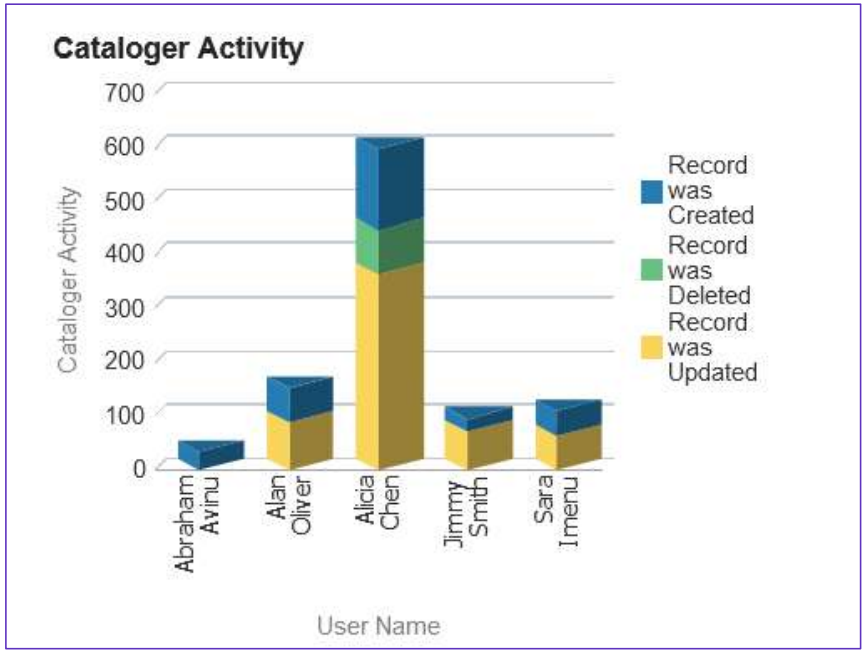
- There may be cases where the library has created a useful chart or graph in Alma analytics and certain librarians will want to add it to their Alma homepage
- This may be done by creating an Analytics object of type Widget
- After the widget is created
  - Each librarian can choose to add the widget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

Introduction

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

Introduction

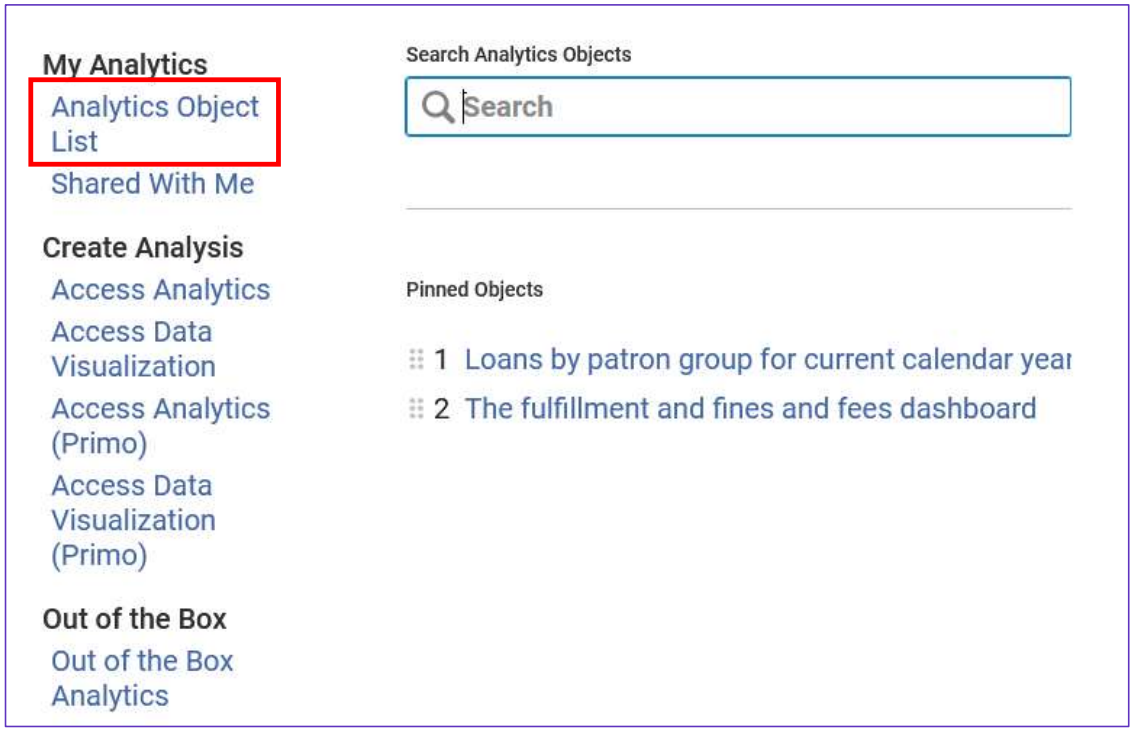
- This is the report which we want to create as a widget:



Creating an analytics object

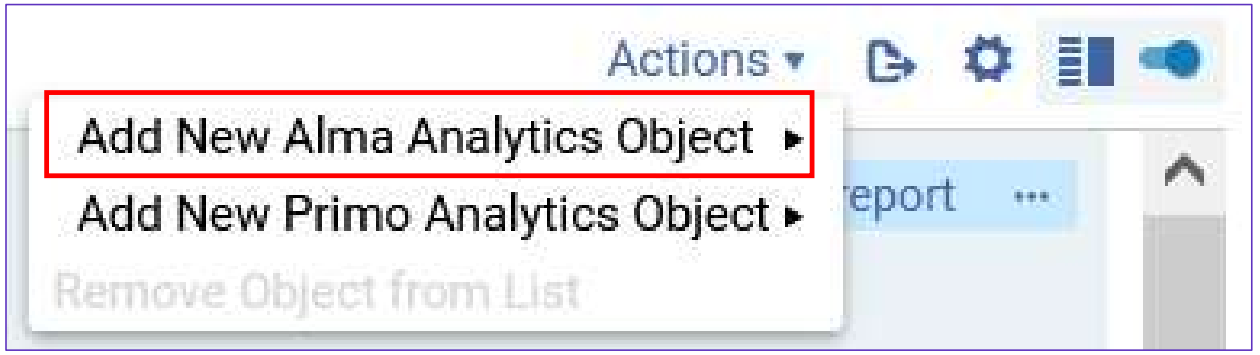
Creating an analytics object

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



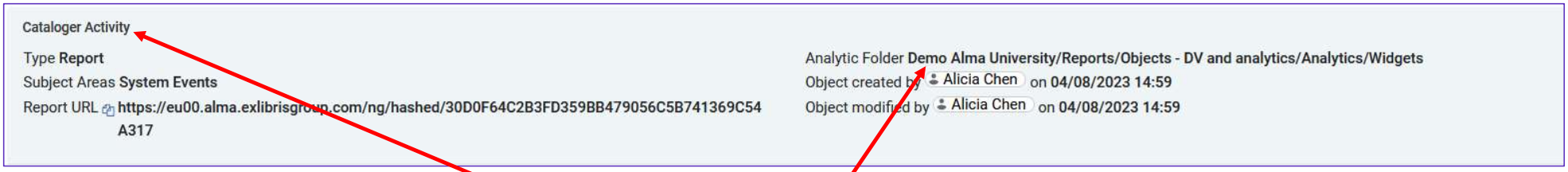
Creating an analytics object

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



Creating an analytics object

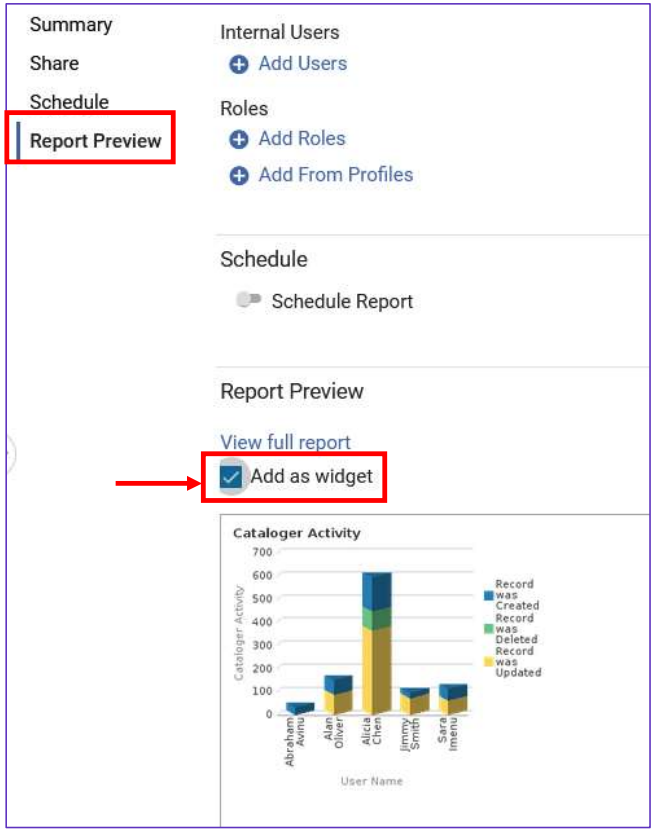
- Choose the folder and report. Optionally update the display name.



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

Creating an analytics object

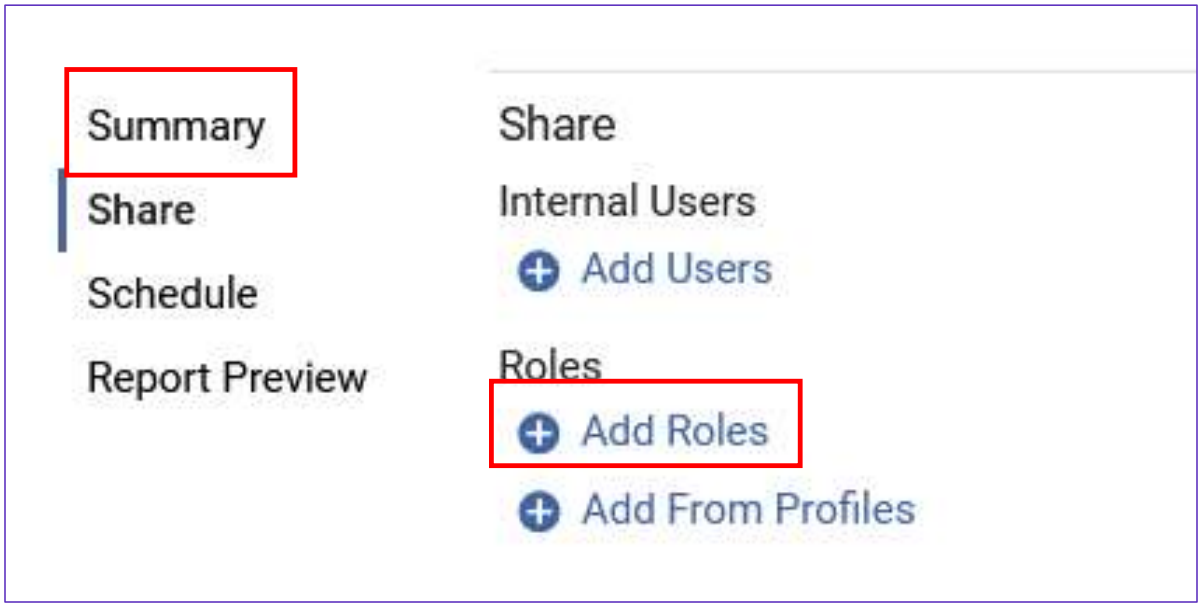
- In the “Report Preview” section check the box “Add as widget”



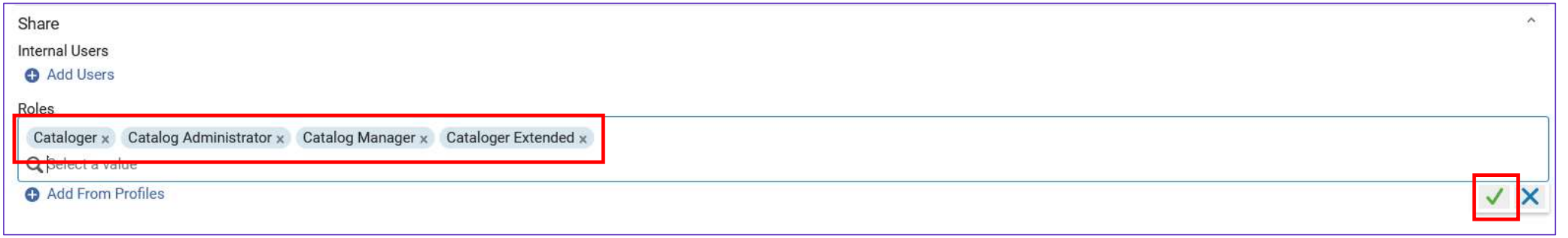
Creating an analytics object

- 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



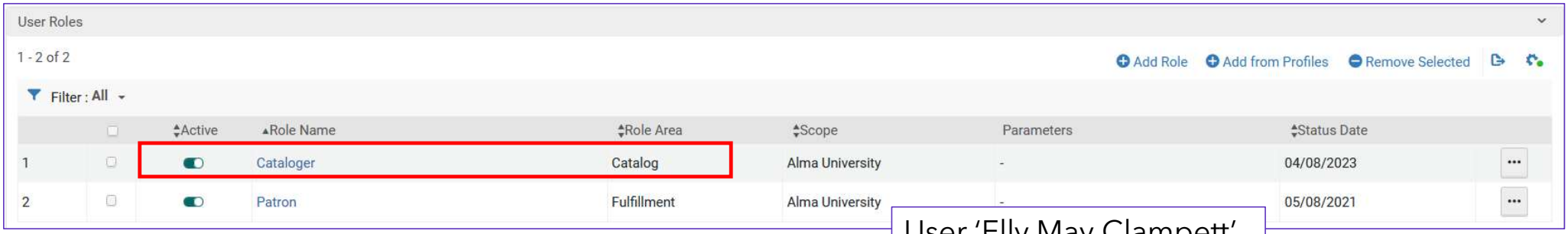
Creating an analytics object



Adding the widget to the Alma homepage

Adding the widget to the Alma homepage

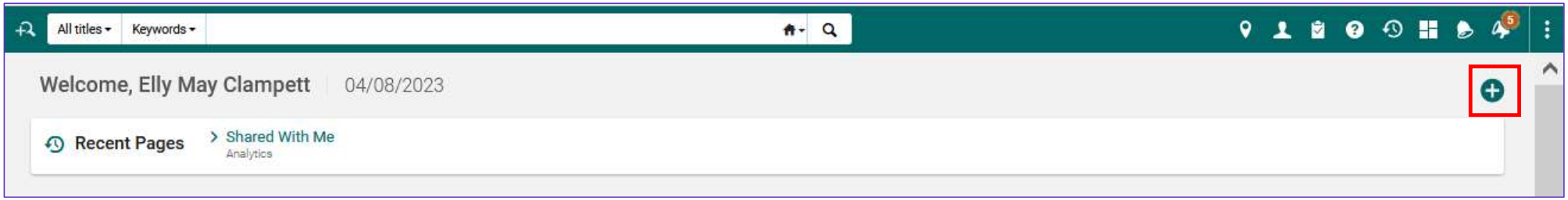
- Alma users with at least one of the relevant roles defined in the scheduled report can add the widget top the Alma Homepage.



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

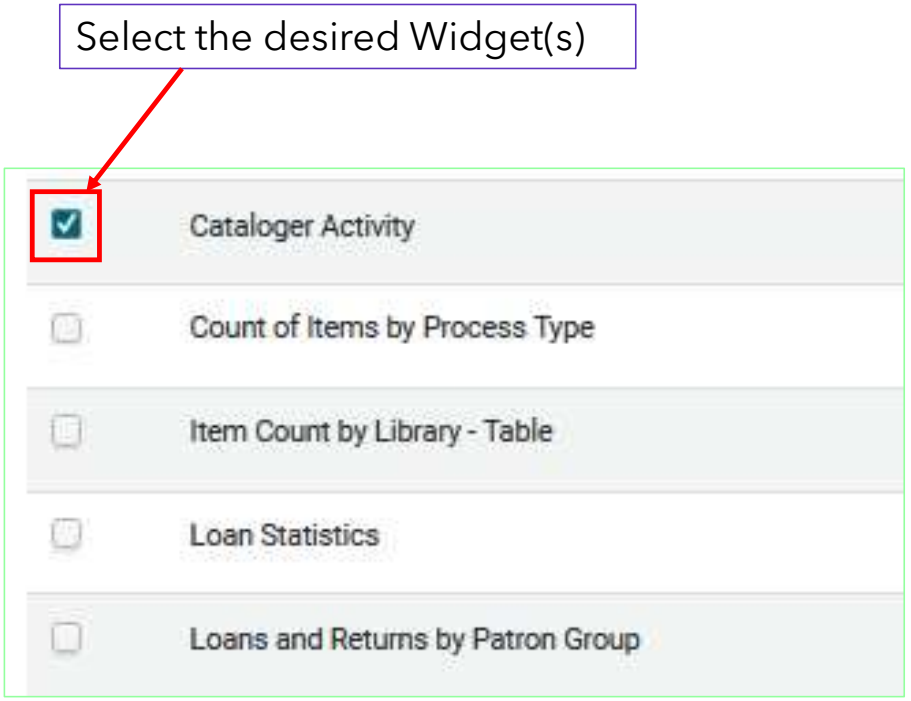
Adding the widget to the Alma homepage

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



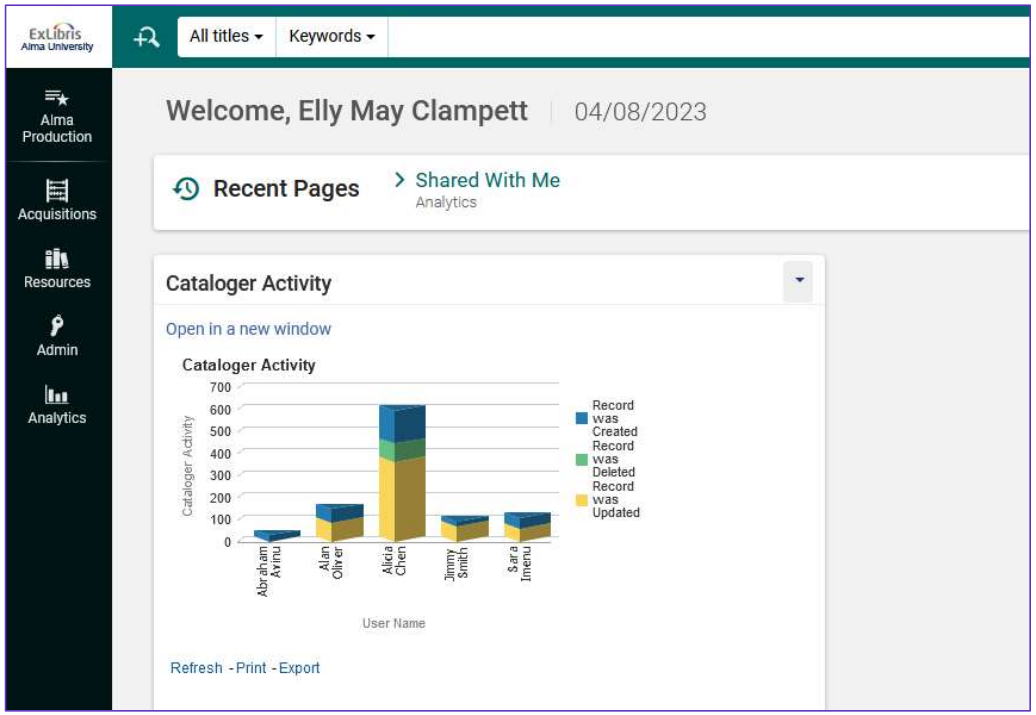
Adding the widget to the Alma homepage

- 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



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