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# DV Workbook as Alma Homepage

Explanation and Live Demonstration

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Introduction

The sample DV Workbook

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Workbook to be the Alma  
homepage



# Introduction

## Introduction

- It is possible to use a Data Visualization workbook as the Alma homepage
- This is useful if a staff user wants to display data relevant to his or her role in Alma by default.
- The homepage appears when first logging into Alma or when clicking the icon on the top left.



# The sample DV Workbook

## The sample DV Workbook

- On the next slide we will look at a DV Workbook relevant for a staff user who deals with fulfillment.
- The DV Workbook shows the number of loans for the current calendar year by patron user group.
- The DV Workbook is called "Loans by patron group for current calendar year" and is saved in folder "Shared Folders/Demo Alma University/Reports/Objects - DV and analytics/DV"

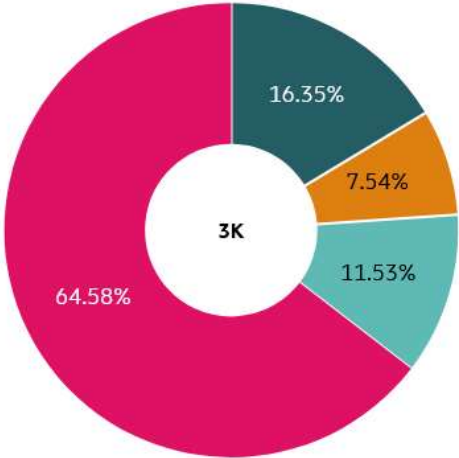
# The sample DV Workbook

## Loans by patron group for current calendar year

User Group, Loans (Not In House)

User Group	Loans (Not In House)
Administrative Staff	410.00
Faculty	189.00
Graduate Student	289.00
Undergraduate Student	1,619.00

Loans (Not In House) by User Group






## The sample DV Workbook

- Here is the DV Workbook saved in the relevant folder

My Folders **Shared Folders**  Sort By **Modified**

Shared Folders > Demo Alma University > Reports > Objects - DV and analytics > **DV**

Type	Name	Description	Owner	Modified
☆ 	TR_J1 - Total Item Requests for 2022		HE_2493...	Mar 20, 2023
☆ 	TR_J1 - Total Item Requests for 2022 top 10 by platform		HE_2493...	Mar 20, 2023
☆ 	Loans by patron group for current calendar year		HE_2493...	Mar 20, 2023





**Configuring the DV Workbook to be the Alma homepage**

## Configuring the DV Workbook to be the Alma homepage

- As previously stated, it is possible to make the Alma homepage be a Data Visualization worksheet.
- The next slide shows the current Alma homepage, with selected analytics widgets.

# Configuring the DV Workbook to be the Alma homepage

- The current Alma homepage

Welcome, Alicia Chen | 04/08/2023

Recent Pages > Publishing Profiles > Manage Sets

Primo top 10 popular searches in last 12 months

Search String	Searches
Library Science	76,254
LC Classification	74,651
יחסיים של זכר	74,621
BIBFRAME	70,198
Linked Data	62,541
RDA	49,851
Dewey Decimal	43,716
מסרה	43,709
desktop web applications	31,987

Primo Basic Search Trends Last 12 Months

Refresh - Print - Export

Item Count by Library - Table

Library Name	Num of Items
Medical Library	1,613,248
Library of Chinese Studies	1,576,876
Engineering Library	1,487,987
Science Library	1,284,527
Main Library	1,094,746
Art Library	892,087
Music Library	709,253
Law Library	586,768
Education Library	387,619

השאלות לפי קבוצות משתמשים ב 365 ימים האחרונים - פי

Refresh - Print - Export

Patrons by User Group

User Group	Num. Users
Administrative Staff	103
Alumni	8
Faculty	473
Graduate Student	1,339
Undergraduate Student	3,442

Refresh - Print - Export

השאלות לפי קבוצות משתמשים ב 365 ימים האחרונים - טבלה

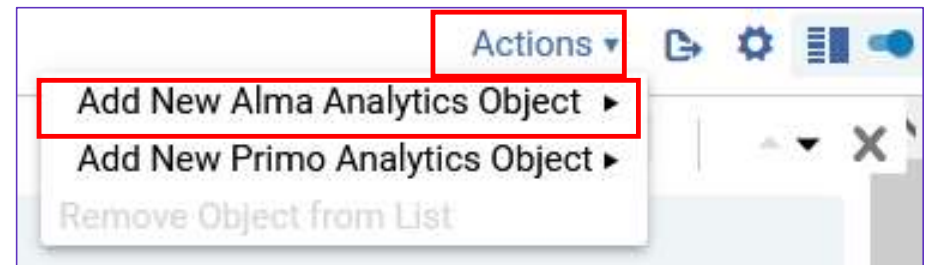
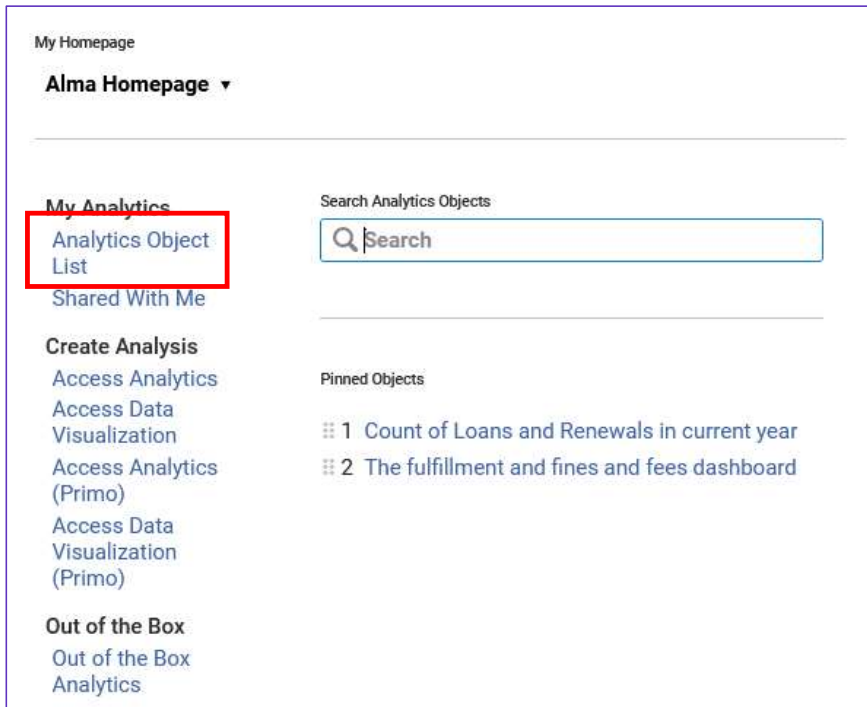
קבוצת משתמשים	מס' השאלות
תואר ראשון	1,619
נוער אדמיניסטרטיבי	410
תואר שני	289
מכל אקדמי	189
בוגרים	121

Refresh - Print - Export

## Configuring the DV Workbook to be the Alma homepage




- Step 1: Add the DV workbook as an object
- First select "Analytics > My Analytics > Analytics Objects List"
- Then choose "Actions > Add New Alma Analytics Object"
- Choose the folder, DV Workbook, and optionally change the display name

# Configuring the DV Workbook to be the Alma homepage



## Configuring the DV Workbook to be the Alma homepage

Loans by patron group for current calendar year

Type Data Visualization Workbook	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV
Subject Areas Fulfillment	
Report URL  <a href="https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEEC5A6D58215D25B0">https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEEC5A6D58215D25B0</a>	Object created by  Alicia Chen on 04/08/2023 12:05
	Object modified by  Alicia Chen on 04/08/2023 12:05

## Configuring the DV Workbook to be the Alma homepage

- Step 2: In the object check the box “Add as dashboard”
- You will also note that by default the object type will be “Data Visualization Project” because we chose a project from Data Visualization and not from Analytics.

# Configuring the DV Workbook to be the Alma homepage

Loans by patron group for current calendar year

Type Data Visualization Workbook

Subject Areas Fulfillment

Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEE5A6D58215D25B0>

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

Object created by Alicia Chen on 04/08/2023 12:05

Object modified by Alicia Chen on 04/08/2023 12:07

Share

Internal Users

+ Add Users

Roles

+ Add Roles

+ Add From Profiles

Schedule

DV objects are sent by email as a link

Schedule Report

Report Preview

View full report

Add as dashboard

Take note that this is a Data Visualization Workbook

"Add as dashboard" is checked



## Configuring the DV Workbook to be the Alma homepage

- Step 3: Assign the roles for which the user will be able to make the DV Workbook be the Alma homepage

Loans by patron group for current calendar year

Type Data Visualization Workbook  
Subject Areas Fulfillment  
Report URL <https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEE5A6D58215D25B0>

Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV  
Object created by Alicia Chen on 04/08/2023 12:05  
Object modified by Alicia Chen on 04/08/2023 12:07

Share

Internal Users

+ Add Users

Roles

Fulfillment Administrator x

Q Select a value

+ Add From Profiles

In the "Roles" section we have defined that if a user has role "Fulfillment Administrator" then he or she can make this DV Workbook be the Alma Homepage

## Configuring the DV Workbook to be the Alma homepage

- User Susan Aarons has role "Fulfillment Administrator" and this she can make this DV Workbook be the Alma Homepage

Active	Role Name	Role Area	Scope	Parameters	Status Date	
<input checked="" type="checkbox"/>	Circulation Desk Manager	Fulfillment	Library of Chinese Studies	Default Circulation Desk	06/06/2023	...
<input checked="" type="checkbox"/>	Circulation Desk Operator	Fulfillment	Library of Chinese Studies	Default Circulation Desk	06/06/2023	...
<input checked="" type="checkbox"/>	<b>Fulfillment Administrator</b>	Fulfillment	Alma University	-	05/03/2023	...
<input checked="" type="checkbox"/>	Fulfillment Services Manager	Fulfillment	Alma University	-	05/03/2023	...
<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Alma University	-	05/03/2023	...
<input checked="" type="checkbox"/>	Library Level Analytics consumer	Miscellaneous	Science Library	-	05/03/2023	...
<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	05/03/2023	...

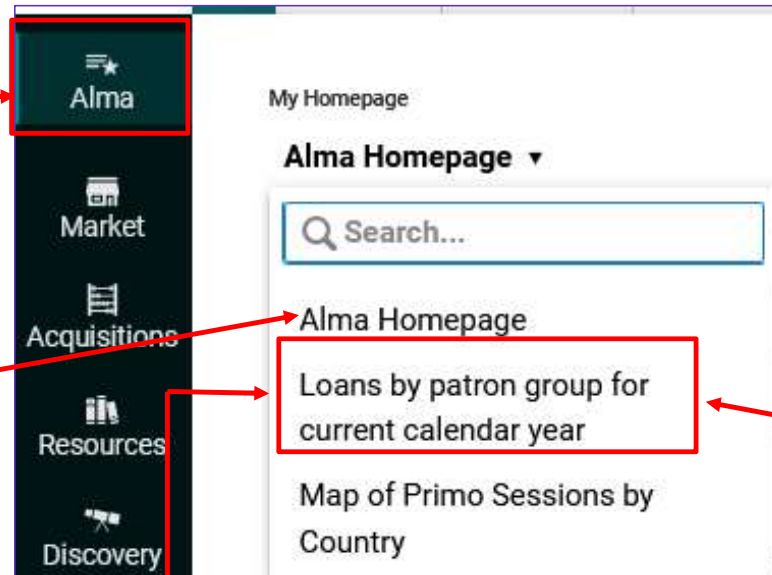
## Configuring the DV Workbook to be the Alma homepage

- Step 4: Click the "Alma" link in the menu on the top left and then select the down arrow next to "Alma Homepage".
- You will see the Data Visualization objects which have been created and have checked "Add as dashboard"
- Choose the desired Data Visualization object

## Configuring the DV Workbook to be the Alma homepage

- Step 4:

Click here



Leave "Alma Homepage" selected to remain with currently functionality (whereby Analytics widgets can be added to the Alma homepage).

We will select this

Select desired DV object. This is the one we looked at a moment ago.

# Configuring the DV Workbook to be the Alma homepage

The screenshot shows the Alma dashboard interface. At the top, there is a navigation bar with the ExLibris Alma University logo, search filters (All titles, Keywords), and various utility icons. A sidebar on the left contains navigation options: Alma Production, Acquisitions, Resources, Fulfillment, Admin, Analytics, and Show MDE. The main content area displays 'User Group (4)' and 'Loans by patron group for current calendar year'. Below this, there is a table titled 'User Group, Loans (Not In House)' and a donut chart titled 'Loans (Not In House) by User Group'. The table shows the following data:

User Group	Loans (Not In House)
Administrative Staff	410.00
Faculty	189.00
Graduate Student	289.00
Undergraduate Student	1,619.00

The donut chart shows the distribution of loans by user group, with a total of 3K loans. The segments are: Undergraduate Student (64.58%), Administrative Staff (16.35%), Graduate Student (11.53%), and Faculty (7.54%).

Now the Alma homepage is the DV worksheet

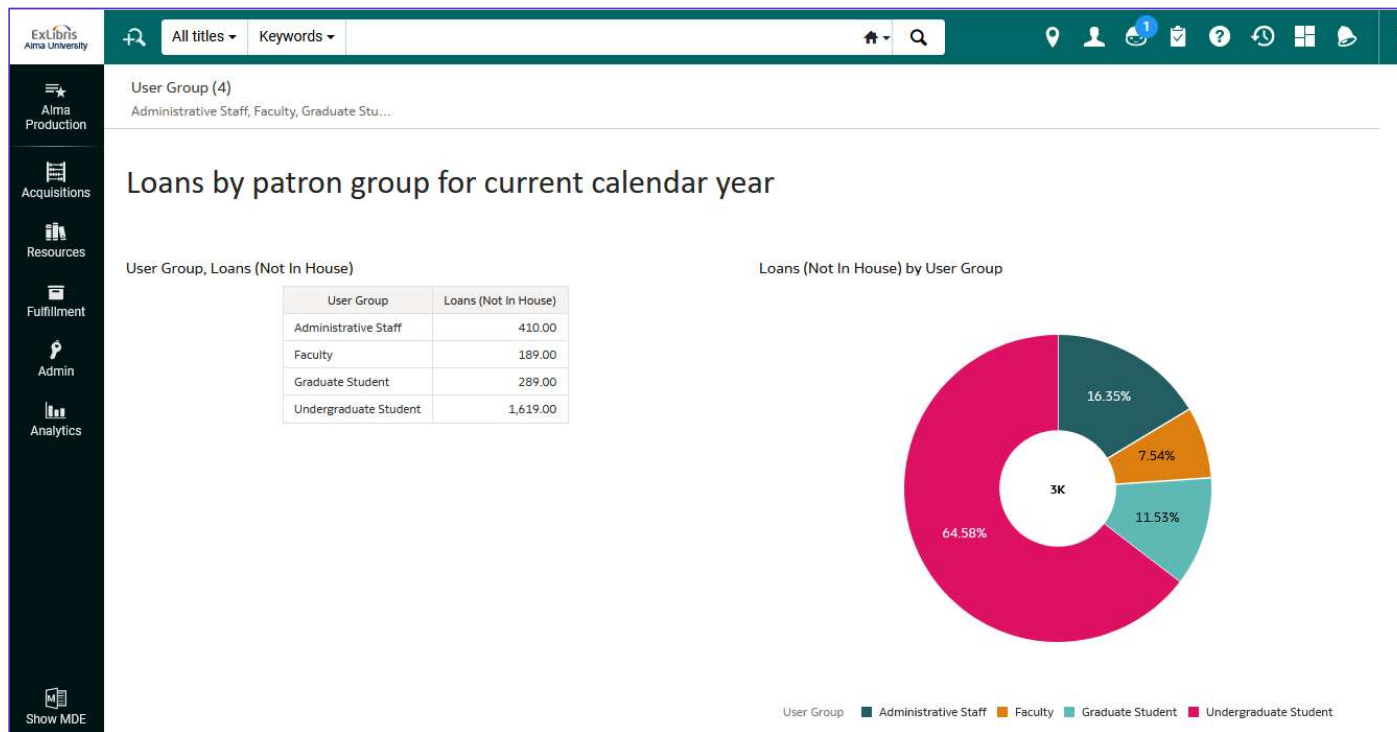
## Configuring the DV Workbook to be the Alma homepage

- At any time, we can click the icon on the top left and return to the Alma homepage

The screenshot shows the Alma library interface. At the top left, there is a logo for Ex Libris Alma University. A red arrow points from a yellow callout box to this logo. The callout box contains the text: "Click here to return to Alma homepage". The main content area shows search results for "taiwan". The first result is "Research Results from National Taiwan University Update Understanding of Information Science" by Alicia Chen, dated 2020-05-12. The second result is "Researchers from National Taiwan University Describe Findings in Information Science" by Greg Brady, dated 2020-05-12. The left sidebar contains navigation options: Alma Production, Market, Acquisitions, Resources, Discovery, and Fulfillment. The top navigation bar includes a search bar with "Digital titles" and "Title" dropdowns, and a search input field containing "taiwan".

## Configuring the DV Workbook to be the Alma homepage

- After clicking the icon, the DW workbook appears on the homepage



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