DV Workbook as Alma Homepage

Explanation and Live Demonstration

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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

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- 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"
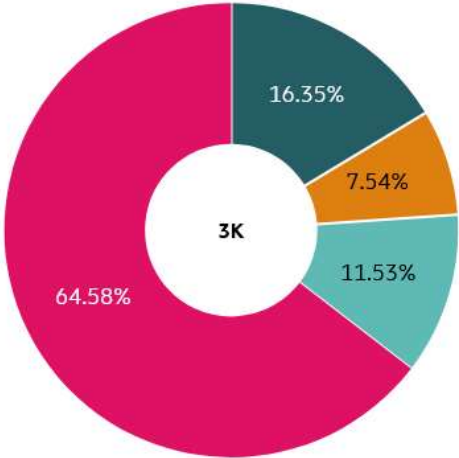
The sample DV Workbook

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

16.35%
7.54%
11.53%
64.58%
3K

The sample DV Workbook

- Here is the DV Workbook saved in the relevant folder

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

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
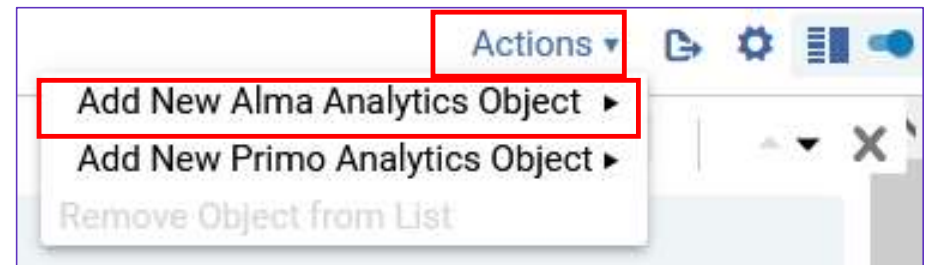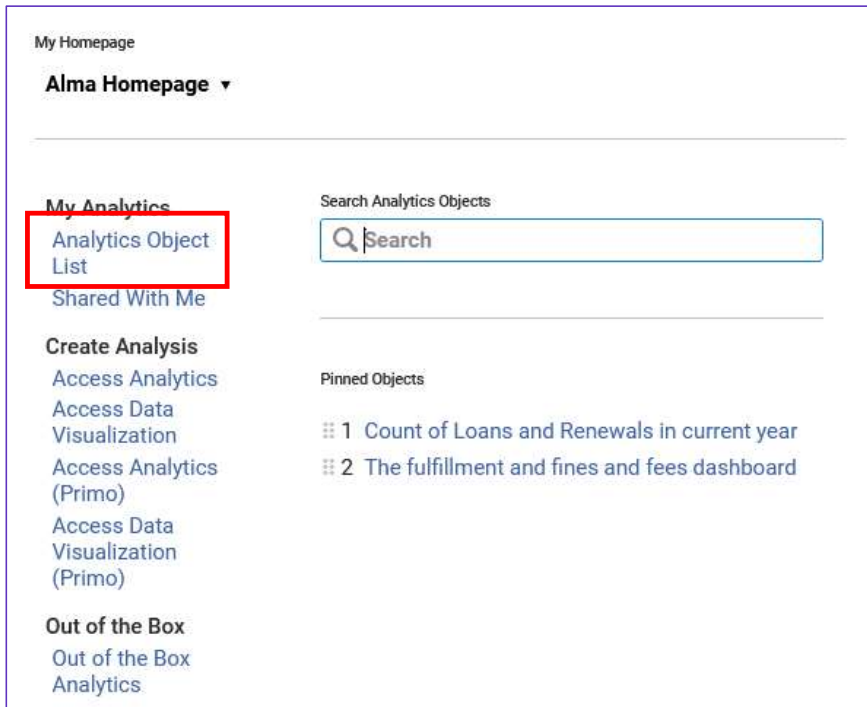
Configuring the DV Workbook to be the Alma homepage

Loans by patron group for current calendar year

Type Data Visualization Workbook

Subject Areas **Fulfillment**

Report URL https://eu00.alma. exlibrisgroup.com /ng/hashed/570B 670189887D225E 774CEEEC5A6D5 8215D25B0

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 12:05**

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

Saved ✓ View full report ⋯

Loans by patron group for current calendar year

Type **Data Visualization Workbook**
Subject Areas **Fulfillment**
Report URL 🔗 **https://eu00.alma.exlibrisgroup.com/ng/hashed/570B670189887D225E774CEEEC5A6D58215D 25B0**

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

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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

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
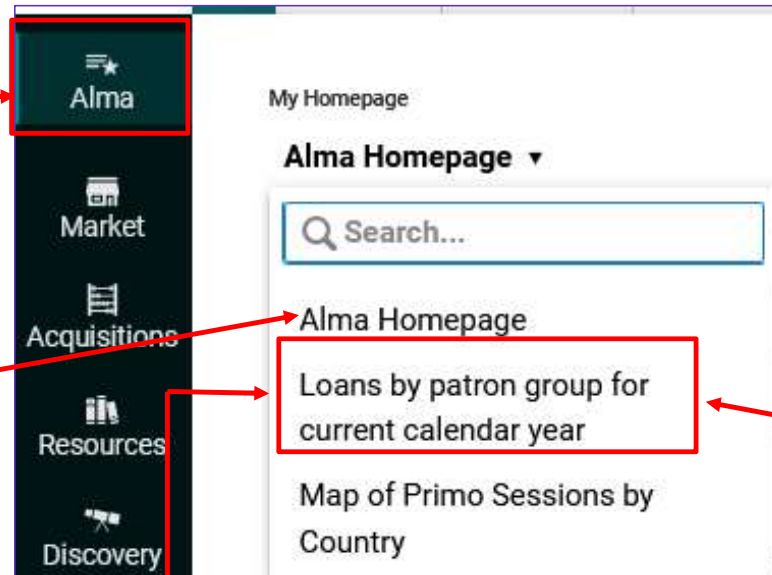
Configuring the DV Workbook to be the Alma homepage

- 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
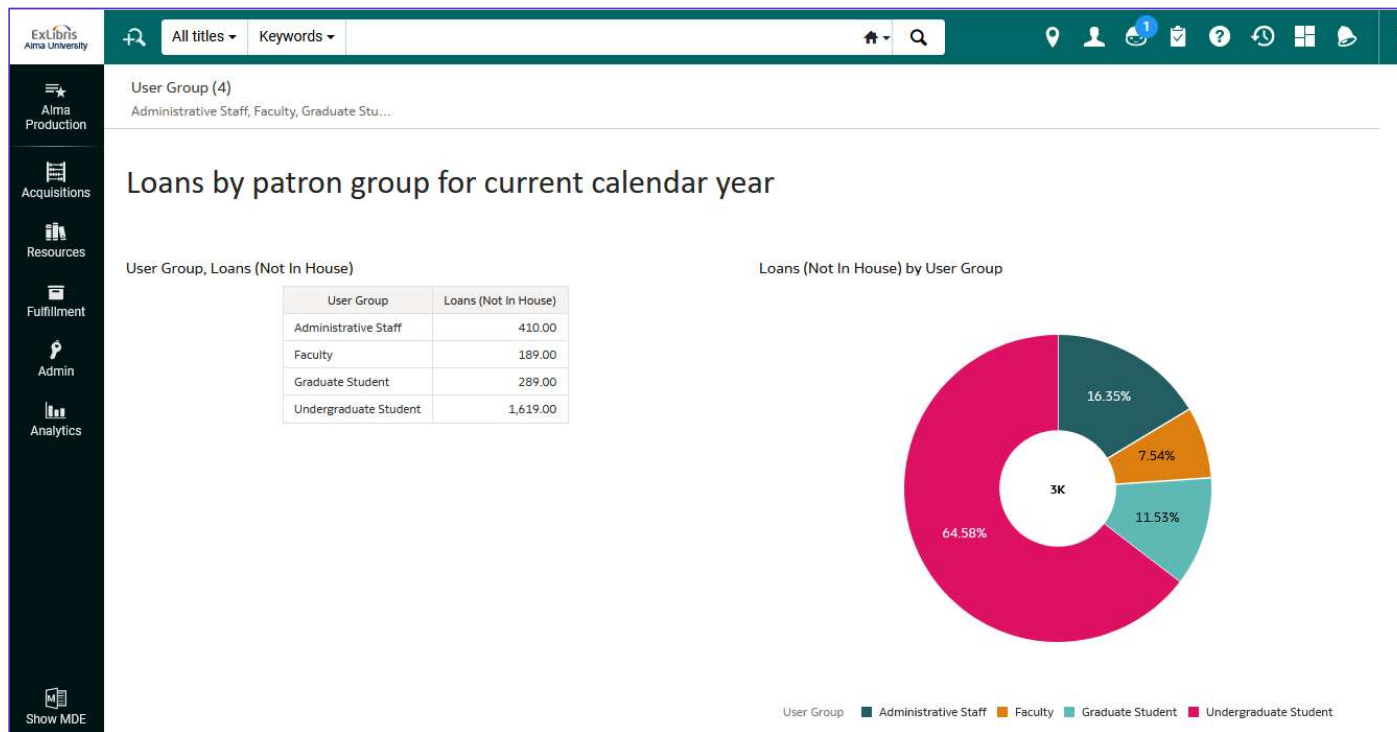

Now the Alma homepage is the DV worksheet

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

Click here to return to Alma homepage

Configuring the DV Workbook to be the Alma homepage

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

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