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The Pinned Objects and the Report URL

Explanation and Live Demonstration

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Introduction

Introduction

- A “Pinned Object” is a quick link defined by the user to appear in Alma when he or she clicks the “Analytics” menu
 - This allows the user to access reports based on his or her user roles.
 - The Pinned Objects appear in the analytics menu, can be reordered as desired, and can also be searched.

Introduction

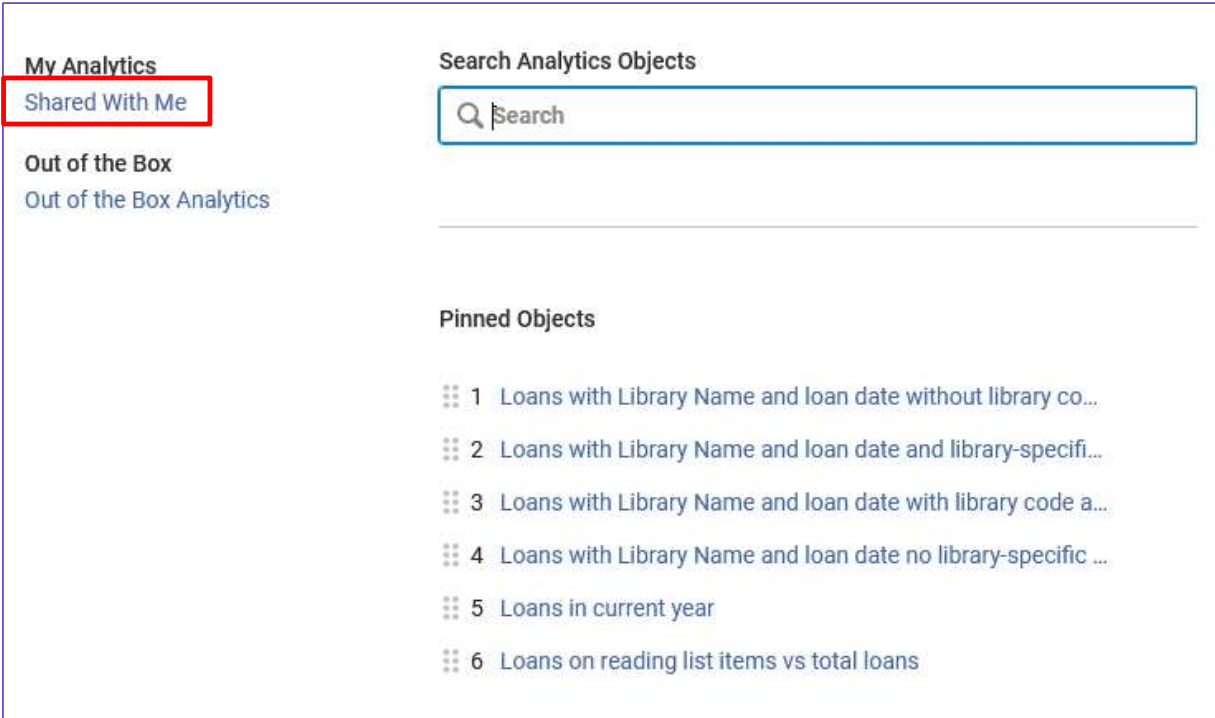
- A “Report URL” is a URL which the user can paste in the browser to access the report. It can, for example, be put in a bookmark or sent to a colleague.
 - It works when the staff user is logged in and accesses the report using the URL in an additional browser tab
 - It will not work if the staff user is not logged into Alma (and it looks at the roles of the logged in user in accordance with the roles in the analytics object)



Pinned Objects

Pinned Objects

- The “Shared With Me” link provides a list of all Analytics Objects which have at least one role which the logged in user has.



The screenshot displays the 'My Analytics' section of a user interface. On the left, a navigation menu includes 'My Analytics', 'Shared With Me' (highlighted with a red box), 'Out of the Box', and 'Out of the Box Analytics'. The main area is titled 'Search Analytics Objects' and features a search input field with a magnifying glass icon and the placeholder text 'Search'. Below the search field, there is a horizontal line and a section titled 'Pinned Objects'. This section contains a list of six items, each with a three-dot icon to its left:

- 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 Loans in current year
- 6 Loans on reading list items vs total loans

Pinned Objects

- For example, if the logged in user (Suzan Aarons) has these roles ...

User Roles

1 - 7 of 7

Filter: All

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"/>	Fulfillment Administrator	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	...

ma.exlibrisgroup.com/ng/ng/#idCollapseTabLXP_113

Pinned Objects

- Then all of the analytics object which he or she will see after clicking “Shared with me” will have at least one of those roles.

Shared With Me (1 - 20 of 24)

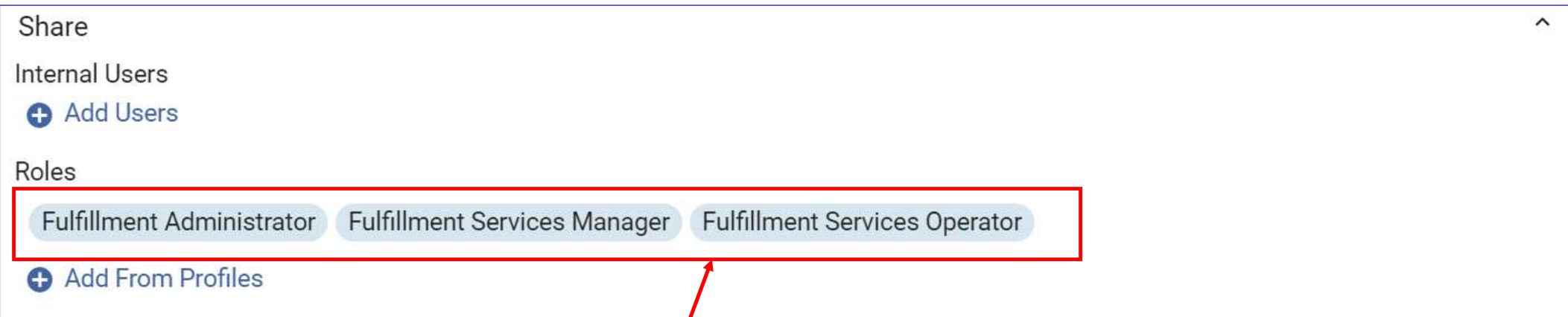
Sort by: Object Creation Date | Type: All | Source System: All | Badges: All | Subject Area: All

1	Count of Loans and Renewals in current year Type Report Subject Areas Fulfillment	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 Alicia Chen on 07/08/2023 Scheduled Report	Pin to Analytics Menu
2	Loans by patron group for current calendar year Type Data Visualization Workbook Subject Areas Fulfillment	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 Alicia Chen on 07/08/2023	Pin to Analytics Menu
3	Fulfillment Dashboard Type Dashboard	Analytic Folder Demo Alma University/Reports/Fulfillment Object created by Bettina Schmid on 16/06/2023 Object modified by Bettina Schmid on 16/06/2023	Pin to Analytics Menu
4	Loans on reading list items vs total loans Type Report Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Fulfillment Object created by Bettina Schmid on 16/06/2023 Object modified by Bettina Schmid on 16/06/2023	Pinned Object Unpin From Analytics M...

For example, let's look at "Count of Loans and Renewals in current year"

Pinned Objects

- In order to see this Analytics Object after clicking “Shared with me” the logged in user will need to have at least one of these roles.



The screenshot shows a 'Share' dialog box with the following elements:

- Share** (top right)
- Internal Users**
 - + Add Users
- Roles**
 - Fulfillment Administrator
 - Fulfillment Services Manager
 - Fulfillment Services Operator
 - + Add From Profiles

A red box highlights the three roles: Fulfillment Administrator, Fulfillment Services Manager, and Fulfillment Services Operator. A red arrow points from a text box below to the 'Fulfillment Services Operator' role.

Our sample user, as we saw, does have at least one of these roles.

Pinned Objects

- Here the logged in user will click “Pin to Analytics Menu” for “Count of Loans and Renewals in current year”

The screenshot shows a user interface for shared analytics objects. At the top, there is a search bar with the text 'Name' and a search icon. To the right of the search bar are filters for 'Sort by: Object Creation Date', 'Type: All', 'Source System: All', 'Badges: All', and 'Subject Area: All'. Below the search bar, there are two object entries:

Object ID	Object Name	Type	Subject Areas	Folder Path	Created/Modified	Actions
1	Count of Loans and Renewals in current year	Type Report	Subject Areas Fulfillment	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 Alicia Chen on 07/08/2023	Scheduled Report Pin to Analytics Menu
2	Loans by patron group for current calendar year	Type Data Visualization Workbook	Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV	Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023	Pin to Analytics Menu

Pinned Objects

- It now appears with the badge “Pinned Object” and an option to “Unpin from Analytics Menu”

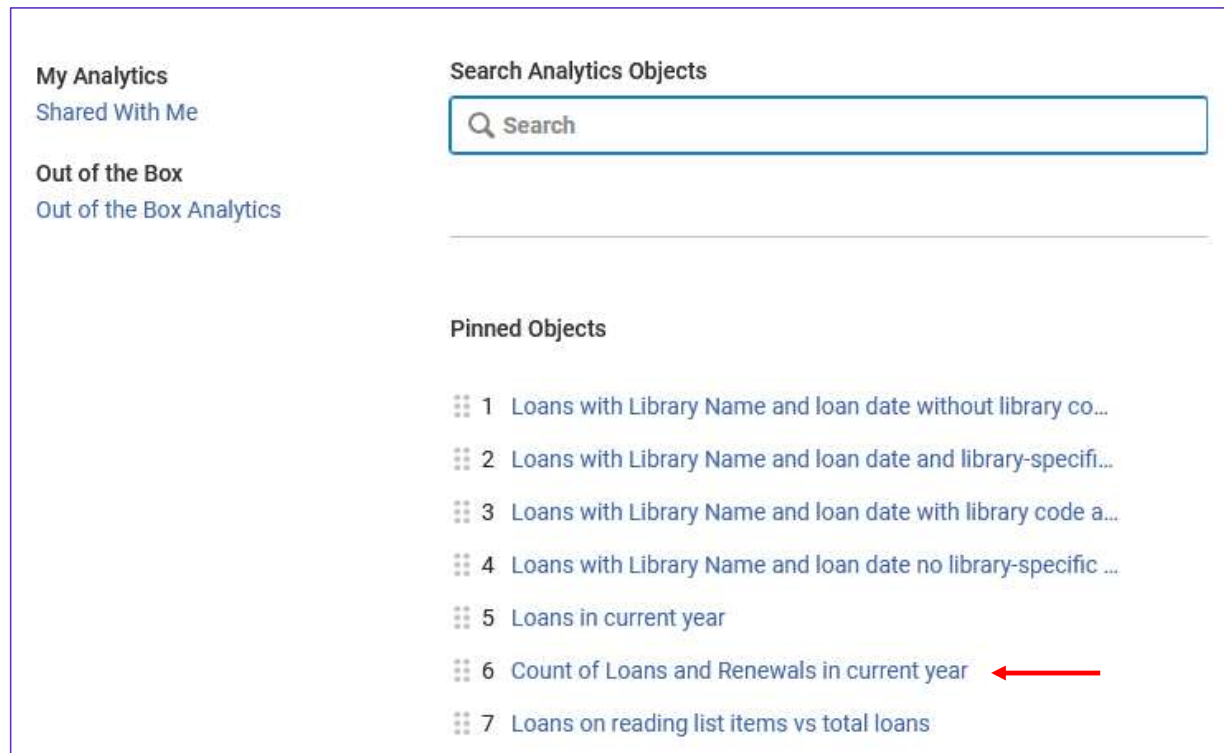
The screenshot displays a user interface for managing reports. At the top, there is a search bar and filter options for 'Sort by: Object Creation Date', 'Type: All', 'Source System: All', 'Badges: All', and 'Subject Area: All'. Below this, two report entries are listed:

Report Title	Type	Subject Areas	Folder Path	Created/Modified	Badges	Actions
1 Count of Loans and Renewals in current year	Type Report	Subject Areas Fulfillment	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 Alicia Chen on 07/08/2023	Scheduled Report Pinned Object	Unpin From Analytics M...
2 Loans by patron group for current calendar year	Type Data Visualization Workbook	Subject Areas Fulfillment	Analytic Folder Demo Alma University/Reports/Objects - DV and analytics/DV	Object created by Alicia Chen on 04/08/2023 Object modified by Alicia Chen on 04/08/2023		Pin to Analytics Menu

Red arrows in the original image point from the 'Pinned Object' badge on the first report to the 'Unpin From Analytics Menu' button, and from the 'Unpin From Analytics Menu' button to the 'Pin to Analytics Menu' button on the second report.

Pinned Objects

- The report is now in the user's Pinned Objects



The screenshot displays the 'My Analytics' section of a user interface. On the left, there are two categories: 'My Analytics' with a sub-item 'Shared With Me', and 'Out of the Box' with a sub-item 'Out of the Box Analytics'. On the right, there is a search bar labeled 'Search Analytics Objects' with a magnifying glass icon and the text 'Search'. Below the search bar is a horizontal line. Underneath the line, the section 'Pinned Objects' is visible, containing a list of seven items, each preceded by a grid icon. The sixth item, 'Count of Loans and Renewals in current year', is highlighted with a red arrow pointing to it from the right.

My Analytics
Shared With Me

Out of the Box
Out of the Box Analytics

Search Analytics Objects

Search

Pinned Objects

- 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 Loans in current year
- 6 Count of Loans and Renewals in current year ←
- 7 Loans on reading list items vs total loans

Pinned Objects

- After clicking the report in the Pinned Objects, it opens in a new tab.

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

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Report URLs

Report URLs

- The report URL appears in the analytics object.
- It can be viewed and copied by the staff user when he or she sees the list of Analytics Objects via the “shared with me” option.

Report URLs

Unpin From Analytics M...

Summary
Schedule
Report Preview

Count of Loans and Renewals in current year

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

Subject Areas Fulfillment

Description This provides a Count of Loans and Renewals in current year

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

Object modified by Alicia Chen on 07/08/2023 10:48

Report URL <https://eu00.alma.exlibrisgroup.com/n.../hashed/C53A90E40DB397B5D554B4...3A4F7B7FA7E66A35>

Copy link

It can be copied here.

Recurrence Pattern Weekly Every Monday At 09:00

Delivery option Attachment FTP

Format PDF

Report URLs

- The URL can be, for example, bookmarked or shared with colleagues.
- If a user tries use the URL to view the report, then it will work only if
 - A. The user is logged into Alma
 - B. The user has at least one role which is in the analytics object
- This prevents non authorized users from viewing the analytics report.

Report URLs

- For example, when a logged in user with a correct role pastes the URL in his or her browser, he or she will see the 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

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Report URLs

- If a non-authorized user (a user not logged into Alma or a user logged into Alma but does not have relevant role) tries to use the URL this will be the result:

Illegal Institution - Please try again

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