Beginning Analytics

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Agenda

- Permissions
- Shared Reports
- Running Reports
- Exporting
- Editing Reports
- Saving
- New Report
- Gotchas

Caveats

Images and demonstrations are being done within a Network Zone. However, the concepts should still be relevant to everyone with Alma Analytics.

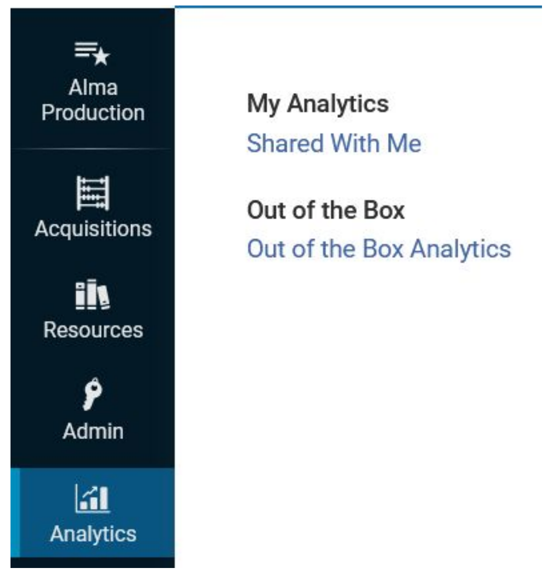
I use the term "reports" and "analysis" interchangeably.

Permissions Needed

- No Analytics Role
- Designs Analytics
- Analytics Administrator

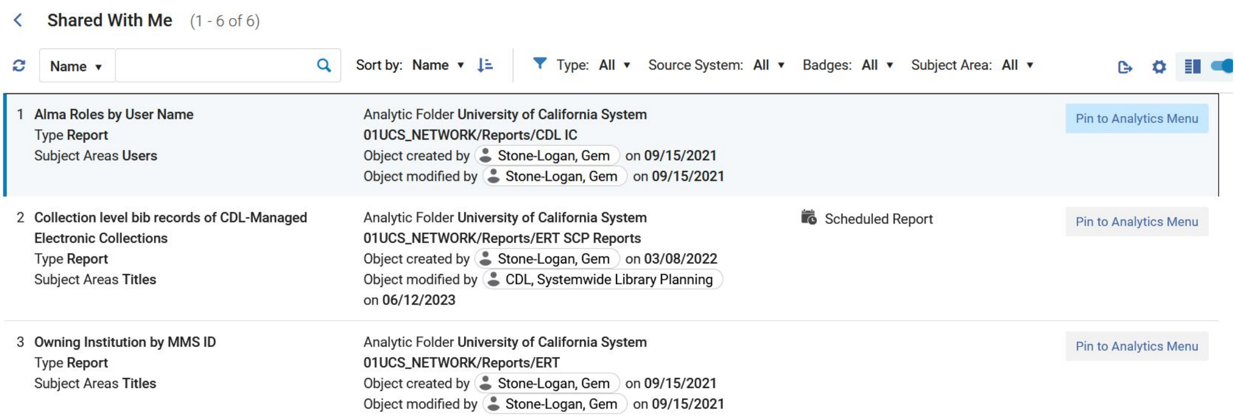
No Analytics Role

- Within Alma, the Analytics Icon Appears
- If the Analytics Administrator has shared reports with your role, you may see reports under **Shared With Me**



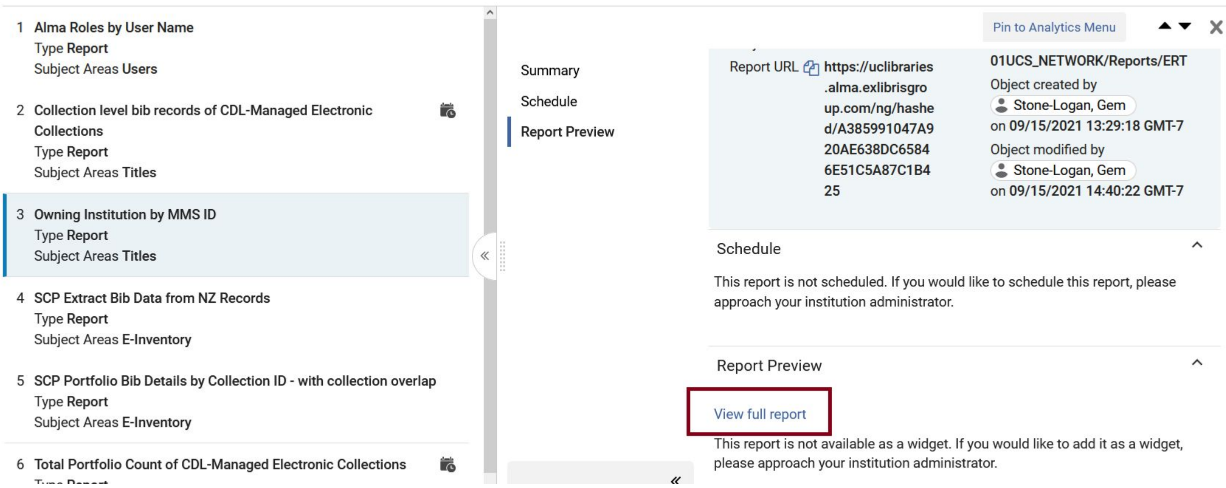
This user has the cataloging and patron roles but nothing else.

No Analytics Role



Here's the list of reports available to my user.

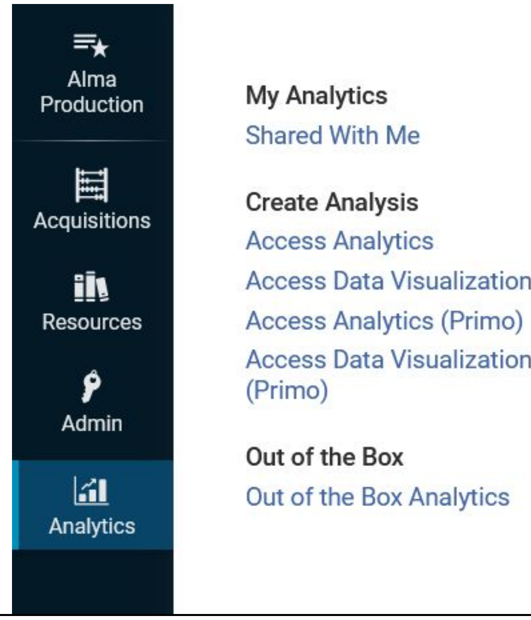
No Analytics Role



Clicking on a specific report shows the report's details.

Designs Analytics

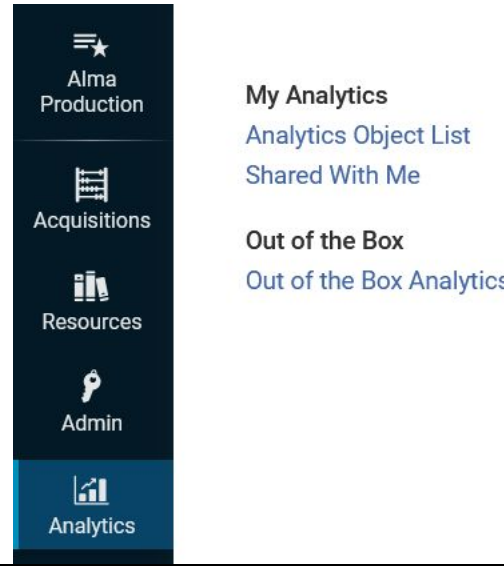
- Allows you to create both Alma and Primo Analytics reports.
- Also allows you to create purchase requests.
- The reports you see under Shared With Me depend on your role.
- Designs Analytics gives you access to the "Out of the Box Analytics" section within Alma



Designs Analytics is the role you need if you want to create reports.

Analytics Administrator

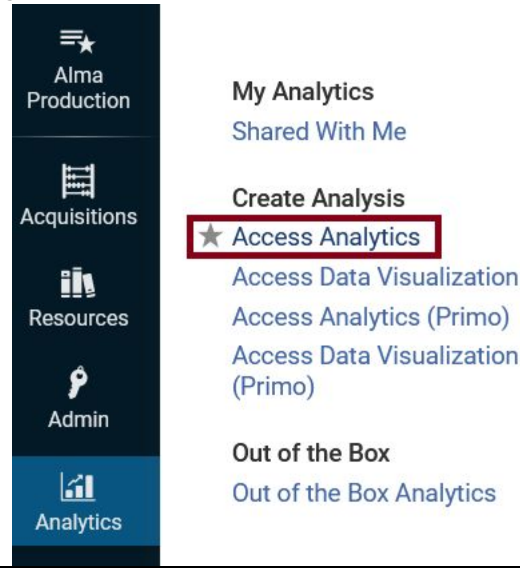
- Without the Design Analytics role, cannot create reports
- Can see the Out of the Box Reports
- Can make reports viewable in Alma
- Can subscribe people to Alma reports
- Can make Analytics configuration changes



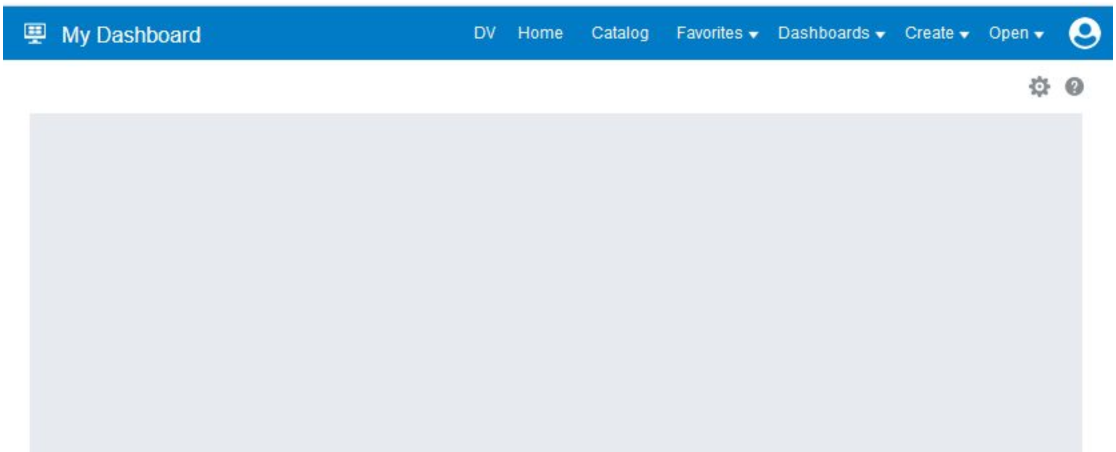
Analytics Administrator does not have the ability to create reports so for this presentation we're going to use the account with the Designs Analytics role.

Opening Up Alma Analytics

1. Click on the Analytics icon
2. Under **Create Analysis**, choose **Access Analytics**

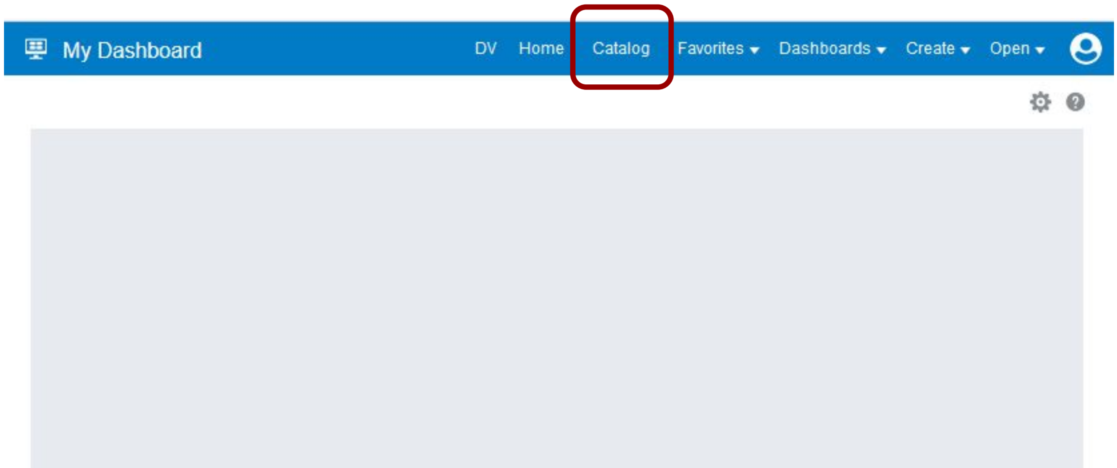


Initial Alma Analytics Screen



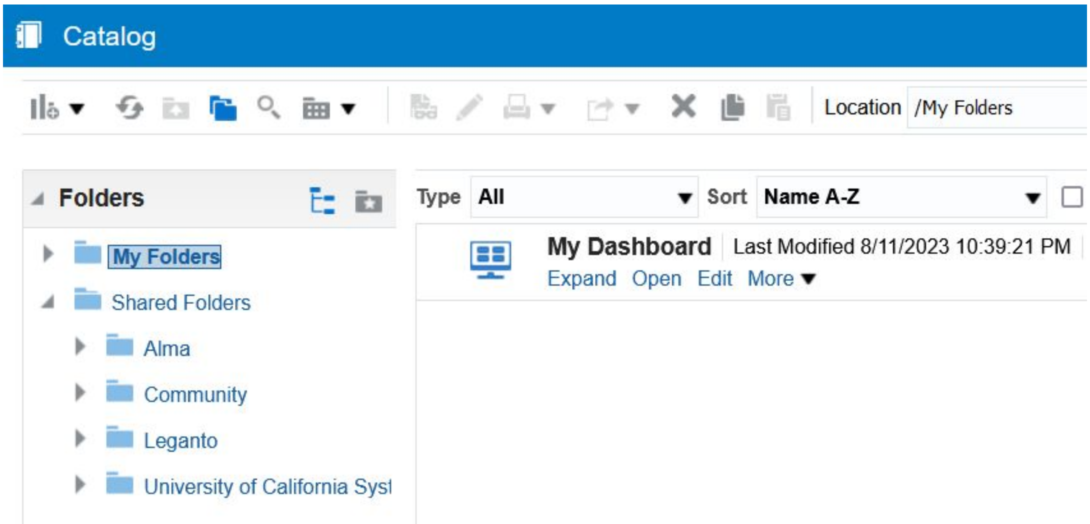
By default, Analytics opens up into "My Dashboard" which if you're a new user is probably blank.

Existing Reports



Click on the Catalog link to see existing reports.

Existing Reports



Click Catalog to see already created reports. The section to the left allows you to browse for reports. Under Shared Folders there will be at least three folders displaying: Alma, Community, and your institution's folder. The Alma folder contains reports created by Ex Libris. The Community folder contains reports created by Ex Libris Users.

Shared Reports: Alma Folder

- Created by Ex Libris
- Read only

Existing Reports: Community Folder

- Within Community folders, *everyone* has access to add, edit, and delete
    - There is a special procedure to delete a folder or report
- Don't make edits to other people's reports. Make a copy and save in your own folder before making changes
- Not all Alma customers use the same Alma Analytics servers. Community reports are shared across regions even Friday night
- Additional information is on Ex Libris' Community Folder Structure page

Ex Libris Documentation: Community Folder Structure

Shared Reports: Institution

- Anyone in your institution can view, edit, and delete reports in these folders
- Check with your institution to see if there are any best practices you should follow
- No one outside your institution can see these

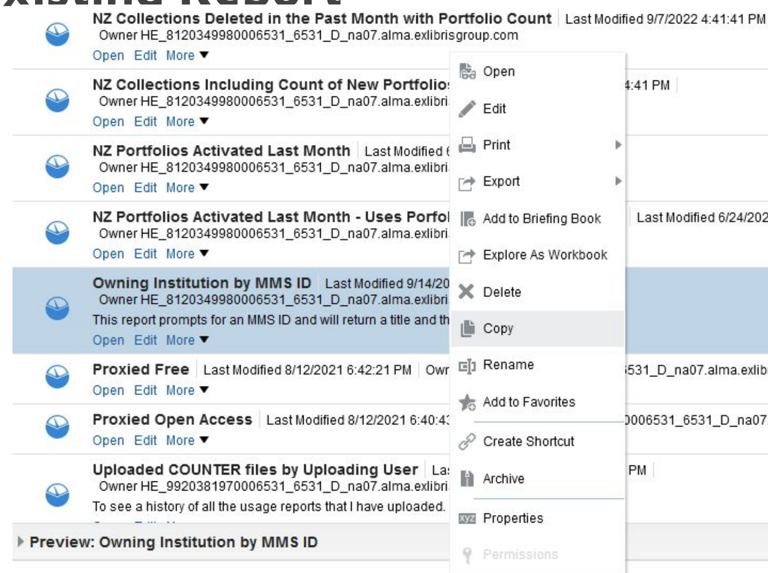
Shared Institution: Institution + NZ

- If you belong to a consortium with a network zone, you may see an additional shared folder
  - This is a feature that requires both your Network Zone Administrator and your Institution Zone Administrator to enable within their respective Alma instances
- If you are using Analytics from an IZ with a Shared Network Zone folder
  - You may run but not edit reports within the Network Zone
  - When you run reports from the Network Zone folder, it will only retrieve data for your institution

Ex Libris Documentation: Configuring Analytics for the Network Zone

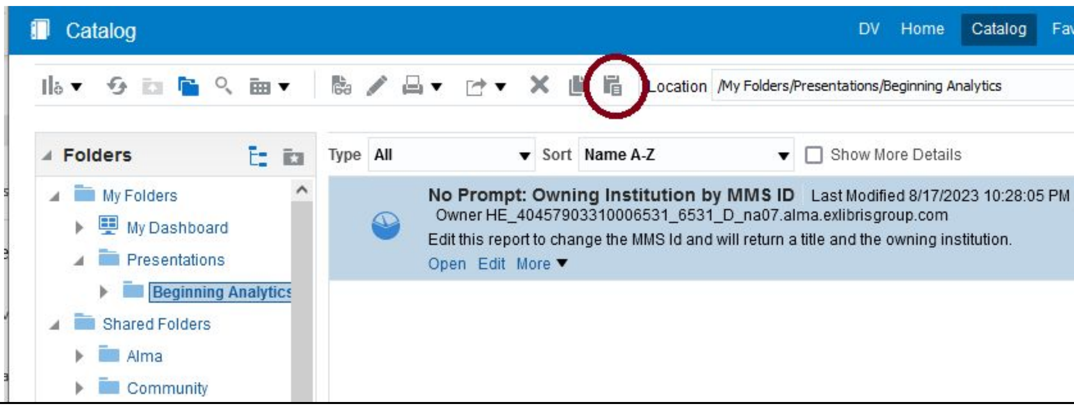
Copying an Existing Report

- **Right** click on the report you wish to copy
- Choose **Copy**



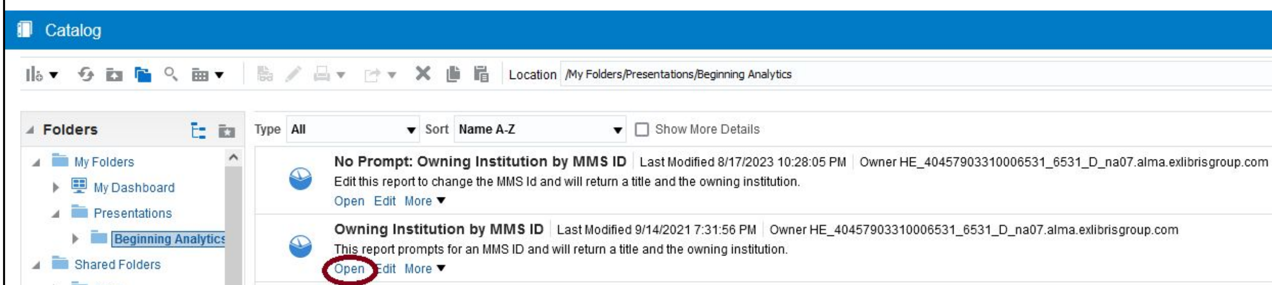
Copying an Existing Report

- Browse to where you wish to paste the report
- Choose **Paste** from the menu



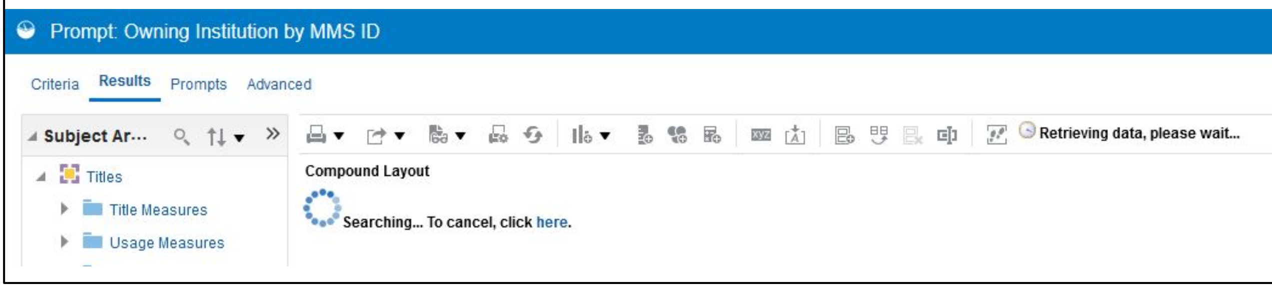
Opening an Existing Report

- Browse to the correct folder
- If you're not planning to edit the report, click **Open**
  - This will ensure you see any prompts

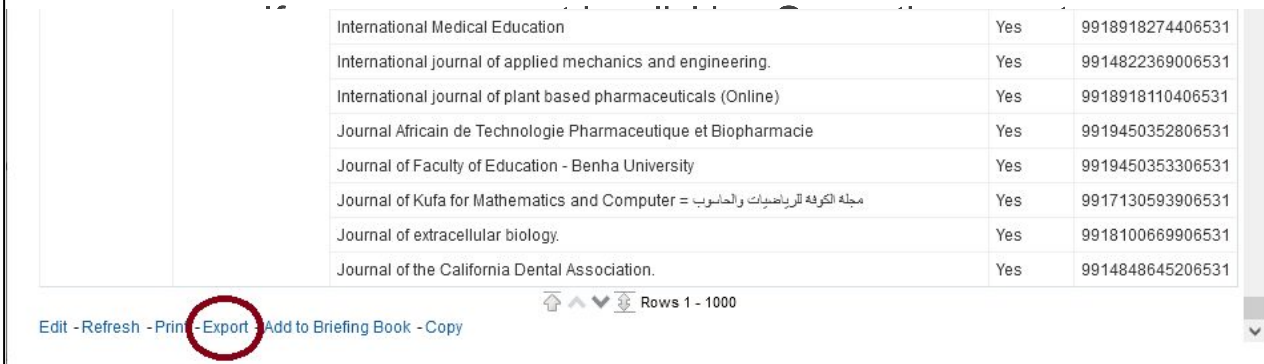


Opening an Existing Report

- What may happen if you try to run a report by clicking **Edit**
- That said, I prefer where the export options are located when I choose **Edit** instead of **Open**



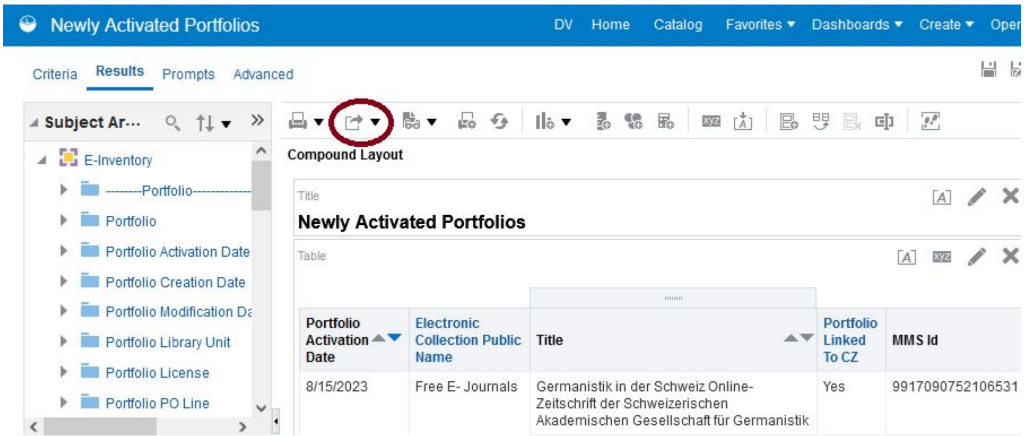
Exporting an Existing Report



International Medical Education	Yes	9918918274406531
International journal of applied mechanics and engineering.	Yes	9914822369006531
International journal of plant based pharmaceuticals (Online)	Yes	9918918110406531
Journal Africain de Technologie Pharmaceutique et Biopharmacie	Yes	9919450352806531
Journal of Faculty of Education - Benha University	Yes	9919450353306531
Journal of Kufa for Mathematics and Computer = مجلة الكوفة للرياضيات والحاسوب	Yes	9917130593906531
Journal of extracellular biology.	Yes	9918100669906531
Journal of the California Dental Association.	Yes	9914848645206531

Use Newly Activated Portfolios

Exporting an Existing Report



Use Newly Activated Portfolios

Export Options and Limitations

- Formatted - Export limit of 2 million *cells**
  - PDF
  - Excel
  - Powerpoint
  - Web Archive
- Data - Export limit of 10 million *rows**
  - Excel
  - CSV
  - Tab Delimited
  - XML

* This summer I was unable to export a report with 1.5 million rows so in many ways, these limits are more theoretical rather than practical.
https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Is_there_a_limit_in_the_Analytics_export_to_Excel

Export Options: Formatted Excel

A	B	C	D	E
Newly Activated Portfolios				
Portfolio Activation Date	**Electronic Collection Public Name**	**Title**	**Portfolio Linked To CZ**	**MMS Id**
8/21/2023	ASME Digital Collection eBooks	Case studies in transient heat transfer with sensitivities to governing variables /	No	9919292937306531
	Wiley Online Library Frontlist All English Titles 2023	Action in uncertainty : expertise, design and crisis management /	No	9919471591206531
		Additive manufacturing of metal alloys.	No	9919471830806531
		Aesthetics in Digital Photography /	Yes	9919471833006531
		Agroecological approaches for sustainable soil management /	No	9919471834006531
		Analysis of enzyme reaction kinetics /	No	9919471835606531
		Animal suffering : the ethics and politics of animal lives /	Yes	9919471831206531

Export Options: Data Excel

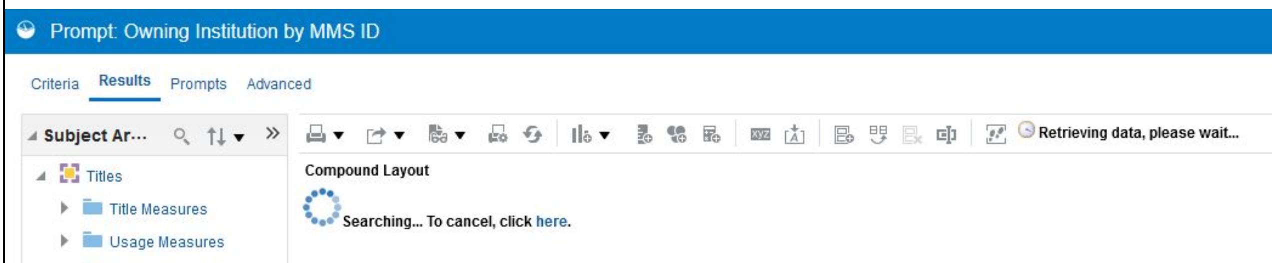
A	B	C	D	E	F
Portfolio Activation Date	Electronic Coll	Title	Portfolio Link	MMS Id	
8/21/2023	ASME Digital (	Case studies in t	No	9919292937306531	
8/21/2023	Wiley Online L	Action in uncerta	No	9919471591206531	
8/21/2023	Wiley Online L	Additive manufa	No	9919471830806531	
8/21/2023	Wiley Online L	Aesthetics in Dig	Yes	9919471833006531	
8/21/2023	Wiley Online L	Agroecological a	No	9919471834006531	
8/21/2023	Wiley Online L	Analysis of enzyr	No	9919471835606531	
8/21/2023	Wiley Online L	Animal suffering	Yes	9919471831206531	

Export Options: Data CSV

A	B	C	D	E
Portfolio Activation Date	Electronic Co	Title	Portfolio L	MMS Id
8/21/2023	ASME Digital	Case studi	No	9.91929E+15
8/21/2023	Wiley Online	Action in u	No	9.91947E+15
8/21/2023	Wiley Online	Additive m	No	9.91947E+15
8/21/2023	Wiley Online	Aesthetics	Yes	9.91947E+15
8/21/2023	Wiley Online	Agroecolo	No	9.91947E+15
8/21/2023	Wiley Online	Analysis of	No	9.91947E+15
8/21/2023	Wiley Online	Animal suf	Yes	9.91947E+15
8/21/2023	Wiley Online	Articulatio	No	9.91947E+15
8/21/2023	Wiley Online	Asymptom	No	9.91947E+15
8/21/2023	Wiley Online	Asymptoti	No	9.91947E+15
8/21/2023	Wiley Online	Beyond CN	Yes	9.91947E+15

Newly Activated Portfolios Data

Editing an Existing Report



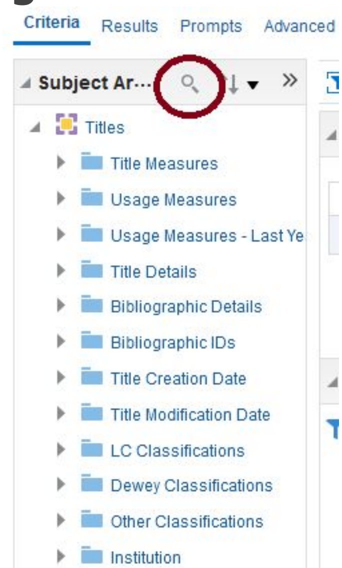
The default behavior when click on **Edit** is to retrieve results. However, you can change it to default to the **Criteria** tab instead. Click the **My Profile** icon in the upper right corner. Choose **My Account**. On the **Preferences** tab, next to **Analysis Editor**, click the drop down next to Full Editor and choose "Start on Criteria tab when editing Analysis". Then click **OK**.

Editing an Existing Report: Adding new columns

- Browse the subject area on the left
- Expand the folders as needed and double check when you find the desired field

OR

- Search for the field
- Hover your mouse over the field to verify which subject/folder the field comes from
- Double click to add to the report

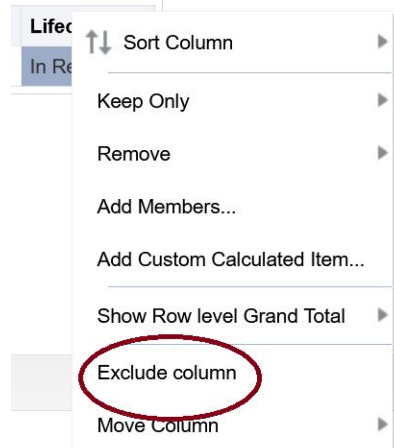


Note: The order in the "criteria" tab does not necessarily match the order in the "results" tab. The export order for data will be the same as the criteria order and the export order for formatted wil be the same as results.

Editing an Existing Report: Excluding a Column

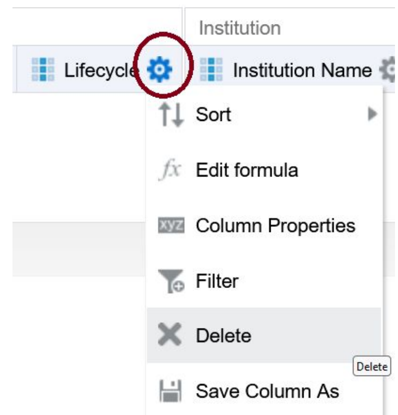
- Exclude a column
  - Click on the **Results** link
  - Right click on the label of the column you wish to exclude
  - Choose **Exclude column**

- Include a column again
  - Right click on any column
  - Click on **Include column**
  - Click on the appropriate column



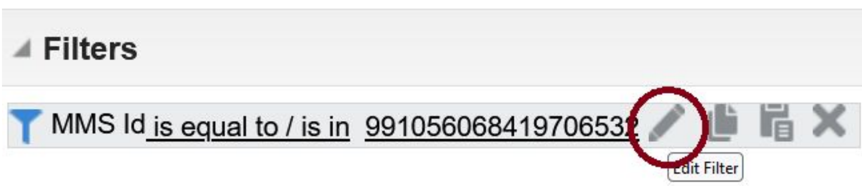
Editing an Existing Report: Deleting a Column

- Click on the **Criteria** link
- Click on the gear next to the column you wish to delete
- Select **Delete**

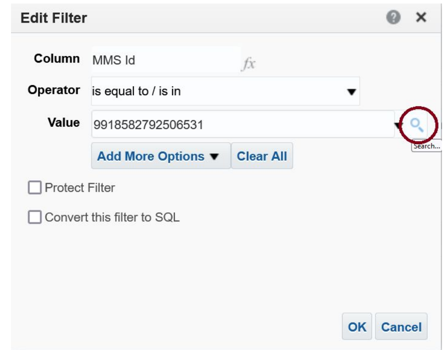


Editing an Existing Report: Editing Filters

- On the **Criteria** screen hover over the filter to change
- Click on the pencil icon
- Enter the new value and click **OK**
- Click **Results** to see the new results

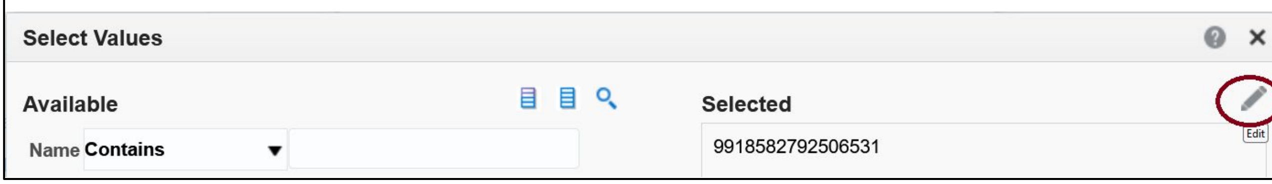


Editing an Existing Report: Editing Filters



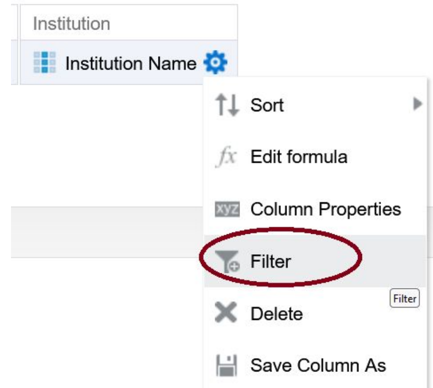
Filtering by multiple values:

- When editing the filter, click the search icon next to value
- Click the pencil next to selected
- Paste in values, one per line
- Click **OK** several times



Editing an Existing Report: Adding New Filters

If you wish to filter on a column in the "Selected" section:

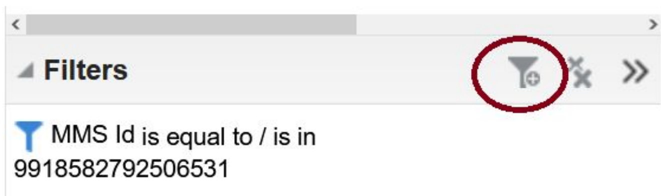


- On the Criteria screen click the gear next to the appropriate column
- Click on **Filter**
- Choose the appropriate operator and value then click **OK**

Editing an Existing Report: Adding New Filters

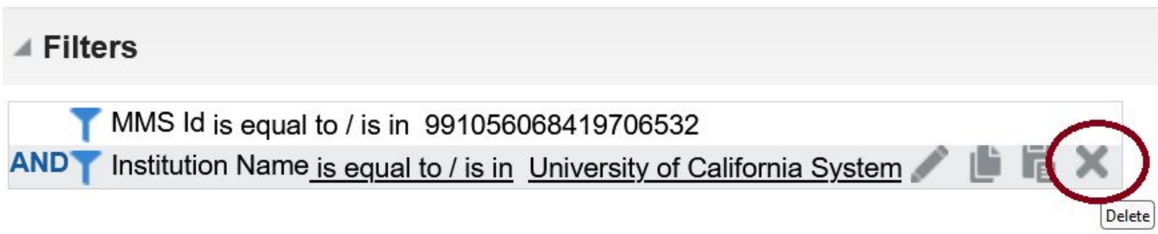
Another way to add a filter

- Start from the Criteria screen
- In the bottom filter section click on "create filter" icon
- Click **More Columns**
- Browse for the column you wish to filter on

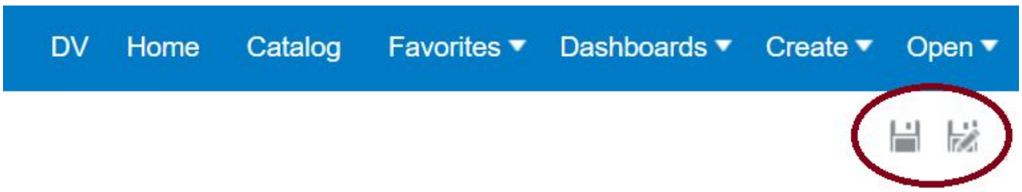


Editing an Existing Report: Deleting Filters

- On the **Criteria** screen hover over the filter to delete
- Click on the X icon



Saving Reports



Creating a Report from Scratch

One of the first steps is choosing a "subject"

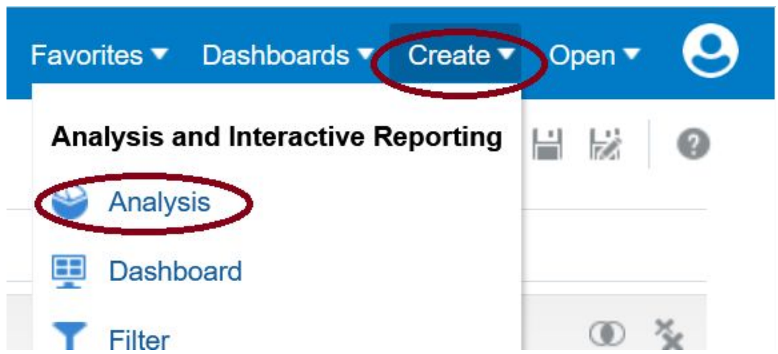
- What information do you need? Each subject has different fields available.
- How current do you need the information to be?

If you're creating new reports often, bookmark Alma Analytics Subject Areas. Pay close attention to anything highlighted in yellow.

Most fields in the Title subject are updated monthly, not daily.
Within e-Inventory, Cost Usage information is updated monthly.

Creating a Report from Scratch

- Click on **Create**
- Choose **Analysis**
- Select subject area



Creating a Report from Scratch: Institution and OCLC

- In this case, I'm going to use the Titles subject
- Add columns and filters just like we did when editing existing reports. In this case:
    - Column: OCLC Control Number (035a)
    - Column: Institution Name
    - Filter: OCLC Control Number (035a) = 1305911488

Creating a Report from Scratch: First result

Title

Table

OCLC Control Number (035a)	Institution Name
1305911488	UC San Diego

Creating a Report from Scratch: Reasonableness Check

Always double check if the data you're retrieving seems reasonable. It's fairly common for me to either run into a known issue or a new bug.

How to check:

- Deep knowledge of the subject area

  OR

- Select a small sample size and check against Alma

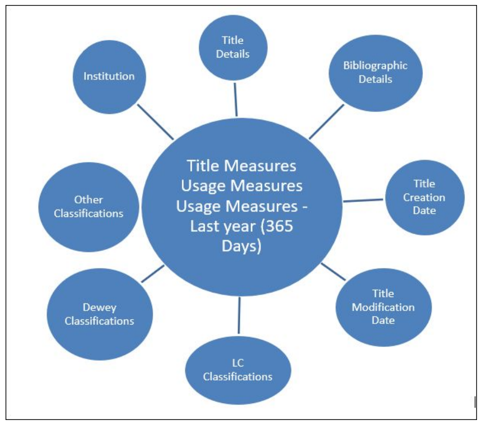
Creating a Report from Scratch: Always add measures

Ex Libris Documentation: Creating a New Report

"To ensure accurate results in your report, it is recommended to use at least one measure field from the fact of the subject area as a column or filter . . . If the measure is not required in the report's output, you can hide the measure in the results pane."

Creating a Report from Scratch: Titles Subject

Reviewing the Titles Documentation

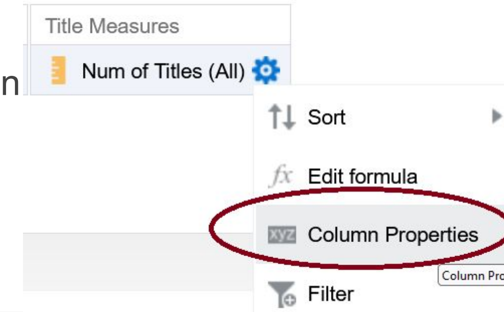


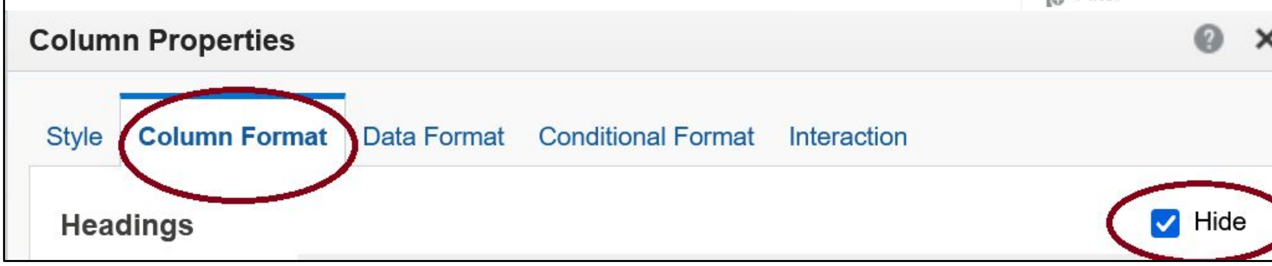
Creating a Report from Scratch: Second result

OCLC Control Number (035a)	Institution Name	Num of Titles (All)
1305911488	UC San Diego	1
	University of California Berkeley	2
	University of California Davis	1
	University of California Los Angeles	1
	University of California Riverside	1
	University of California System	1

Creating a Report from Scratch: Hiding a Column

- In **Criteria**, click the gear column
- Click on **Column Properties**
- Select **Column Format**
- Click the **Hide** checkbox
- Click **OK** and re-run report





Creating a Report from Scratch: Third result

OCLC Control Number (035a)	Institution Name
1305911488	UC San Diego
	University of California Berkeley
	University of California Davis
	University of California Los Angeles
	University of California Riverside
	University of California System

Gotchas

- Lifecycle
- Timeouts
- Opening another Alma session
- Exporting problems
  - "Server is busy" or it never finishes "processing" the export
- When was the data last updated?
  - Alma Analytics should only be one day behind Alma but sometimes it loads slow.
  - Some data only refreshes monthly by design.

Lifecycle: Alma Analytics includes deleted information. To make sure you're only including current bibs, items, etc, make sure you filter to an "In Repository" or "Active" lifecycle.
Timeouts: Intermittently go back to Alma and make sure you keep the session alive. Otherwise you'll be logged out of Analytics.
Exporting problems: If you get a server is busy message, immediately submit at least a high priority ticket with Ex Libris.
Data last Updated: In general, Analytics should only be a day behind but you can check in Alma when it was last updated. That said, some columns only updated monthly.

Additional Resources

- Video: Alma Analytics: Become an Export (highly recommended)
- Common Analytics Procedures
- Harvard Wiki: Alma Analytics

Questions?

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