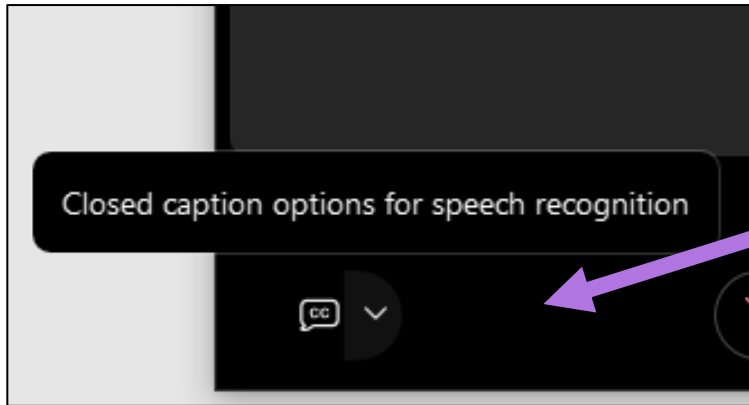
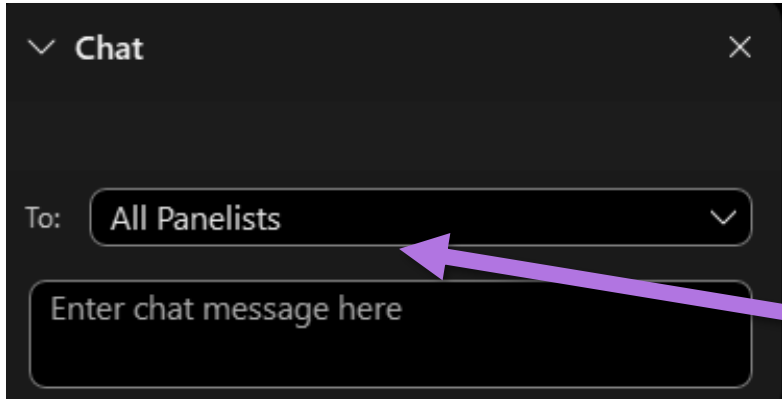




Session 1: Overview and Introduction

September 2024

A few points about WebEx



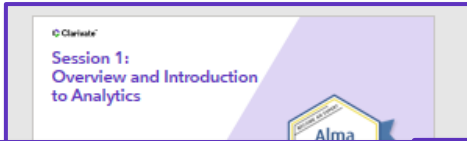
- Technical issues? Exit and rejoin the WebEx session
- This session is being recorded
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen

Training-Series Session Topics

Session	Topic	Date
1	Overview and Introduction	Sep. 18
2	Physical Inventory and Fulfillment	Sep. 25
3	Electronic Inventory, Usage, and Acquisitions	Oct. 2
4	Creating and Managing Dashboards	Oct. 9
5	Creating and Managing Prompts	Oct. 16
6	Filters and Functions	Oct. 23
7	Analytics Objects	Oct. 30
8	Useful Tips	Nov. 6

Training-Series Resources

Presentation Slides



Exercises

Documentation and Training



 Home » Alma » Training » Webinars » Alma Analytics: Become an Expert

Alma Analytics: Become an Expert



Alma Analytics: Become an Expert is a series of eight 90-minute sessions intended to provide learning opportunities for Alma Analytics operators at all levels. These sessions include information on using Analytics to manage inventory, monitor Acquisitions and Fulfillment activities and more.

The Become an Expert series is structured as follows:

- Session 01 = A general overview and introduction
- Sessions 02-03 = A focus on specific areas such as physical and electronic inventory, fulfillment, acquisitions and COUNTER usage.
- Sessions 04-08 = A drill down to specific analytics functions that can help you create reports more efficiently.

Note about closed captions (CC): Captions on the recording were created by an automated system and are not entirely accurate.

A large, stylized badge on the right side of the page. It is a hexagon with a yellow border and a blue ribbon-like shape on the right side. Inside the hexagon, the text 'BECOME AN EXPERT' is written in a small, black, sans-serif font at the top. Below it, the words 'Alma Analytics' are written in a large, blue, serif font.

Agenda

- **Analytics Roles**
- ETL – Extract, Transform, and Load
- Folder Structure
- Dashboards
- Create a (very basic) Report
- How Reports are “Consumed”

Administrators, Designers, and Consumers

Administrators configure analytics, and create and distribute analytics objects.

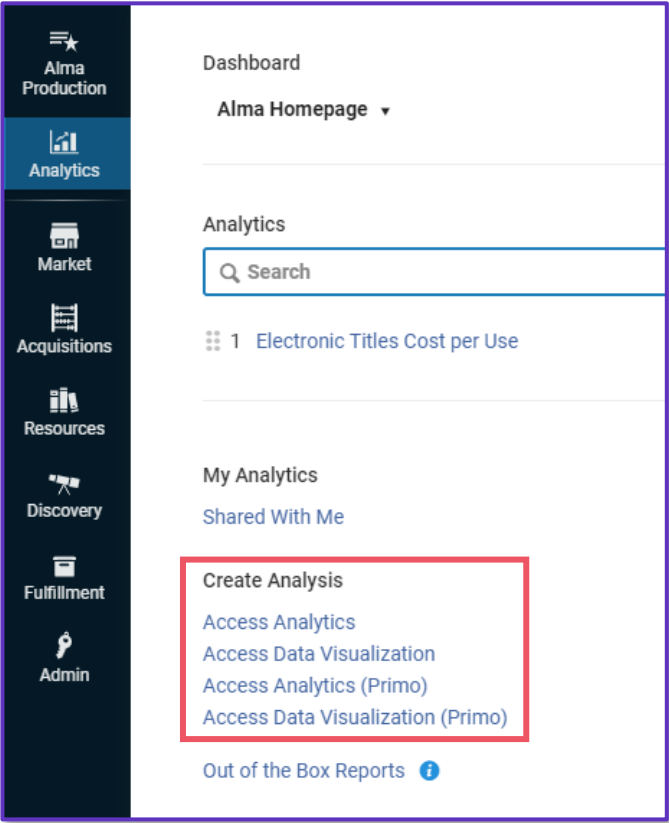
Designers create, edit, and delete reports, dashboards, and other entities.

Consumers view analytics objects (reports and dashboards), receive by email a scheduled report, or view a widget on their Alma landing page.

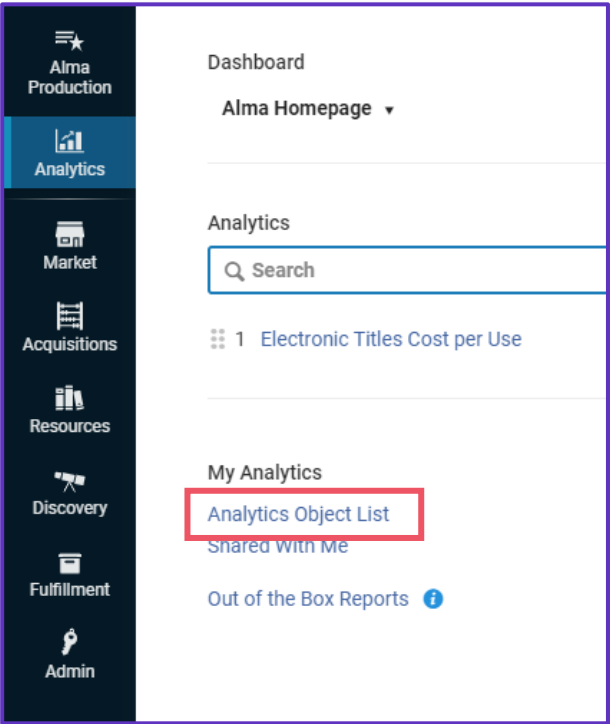
☐	Role
☒	API Infra Read
☒	API Label Printing Read
☒	Analytics Administrator
☒	Chat with Support
☐	Cloud App Operator
☒	Designs Analytics
☒	General System

Analytics Roles in Alma

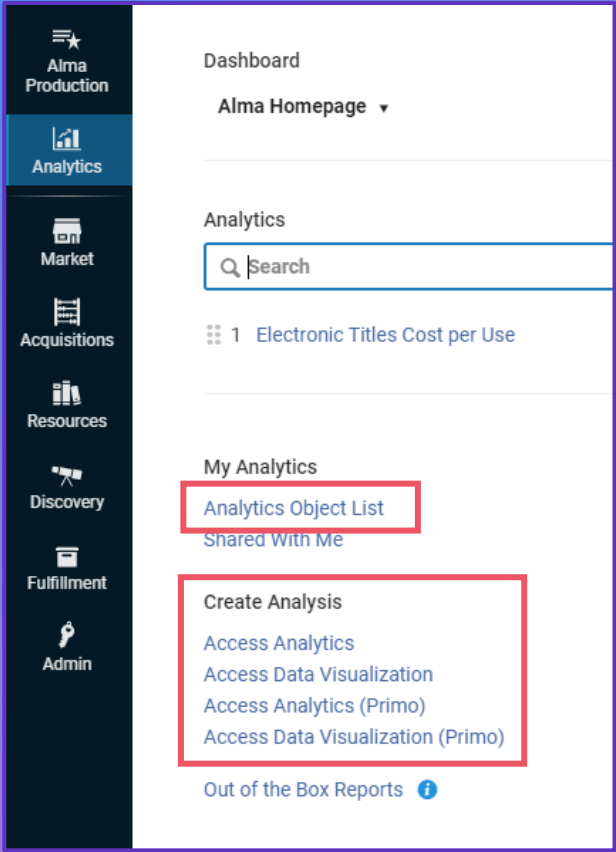
A user with role "Designs Analytics" but **not** "Analytics Administrator"



A user with role "Analytics Administrator" but **not** "Designs Analytics"



A user with both roles "Analytics Administrator" and "Designs Analytics"



Analytics Consumer

Consumers receive or can access analytics objects (dashboards and reports) ...

- Via a link on the Analytics menu in Alma
- Via a widget on the Alma landing (home) page
- Via email as a scheduled report
- From within Analytics tool (as a Designer)
- Via an API

Consumers can only access objects that have been shared with them in some way ...

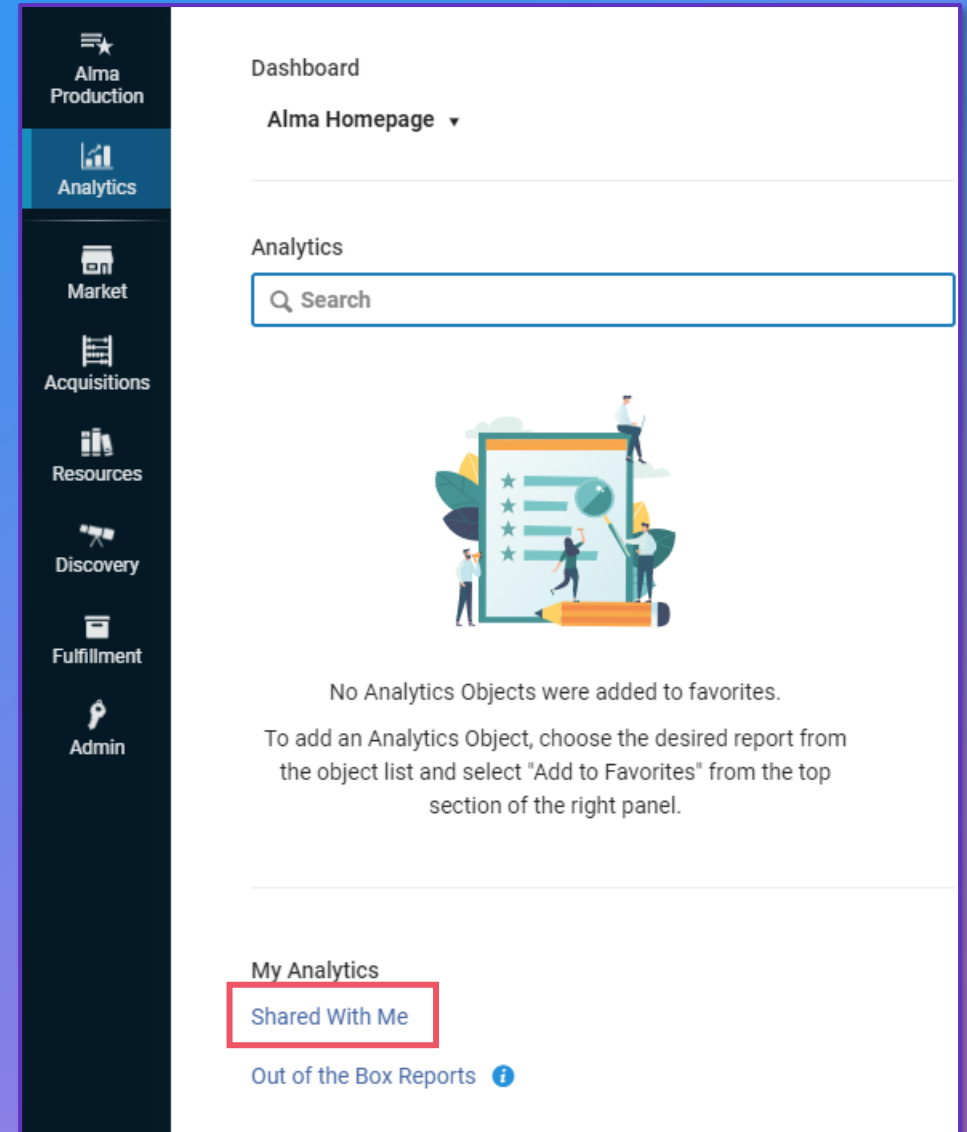


Sharing Objects

Administrators share objects with users:

- In groups based on the users' Alma roles
- Individually by Alma username
- Individually by email address

Consumers with access to Alma will find reports and dashboards on **Analytics > Shared With Me**



Agenda

- Analytics Roles
- **ETL - Extract, Transform, and Load**
- Folder Structure
- Dashboards
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- How Reports are "Consumed"

Extract, Transform and Load

- ETL moves your institution's data from Alma to Oracle Analytics
- An incremental ETL occurs every night
- Data from most subject areas are updated daily
- A few subject areas are updated less frequently

The screenshot displays the Oracle Analytics user interface. On the left is a sidebar with the following links: 'My Analytics', 'Analytics Object List', 'Shared With Me', 'Create Analysis', 'Access Analytics', 'Access Data Visualization', 'Access Analytics (Primo)', 'Access Data Visualization (Primo)', 'Out of the Box', and 'Out of the Box Analytics'. The main content area on the right features a 'Search Analytics Objects' section with a search bar. Below this is a 'My Pinned Analytics' section containing a list of four items: '1 Electronic Cost Usage Dashboard', '2 Physical and Electronic Expenditures Comparison', '3 Portfolios Created in Last 24 Months and Not Activated', and '4 Count of Loans by Circ Desk'. Further down is an 'Analytics Pinned by Admin' section with the message 'There is no new analytics object pinned by admin.' At the bottom of the interface is an 'Additional information' section, which is highlighted with a red box and contains the text: 'Data available as of: 09/11/2024 02:12:36 EDT' and 'Data updated as of: 09/10/2024 20:05:00 EDT'.

Agenda

- Analytics Roles
- ETL – Extract, Transform, and Load
- **Folder Structure**
- Dashboards
- Create a (very basic) Report
- How Reports are “Consumed”

Agenda

- Analytics Roles
- ETL – Extract, Transform, and Load
- Folder Structure
- **Dashboards**
- Create a (very basic) Report
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Agenda

- Analytics Roles
- ETL – Extract, Transform, and Load
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- Dashboards
- **Create a (very basic) Report**
- How Reports are “Consumed”

Create an Analytics Report

"How many Alma users are assigned to each user group?"

1. Create: **Analysis**
2. Select Subject Area: **Users**
3. Select Columns:
 - User Details > **User Group**
 - User Measures > **Number of Users**
4. Check **Results**
5. Add visualization as desired

Users per User Group

User Group	Number of Users
	18
API	1
Academic Staff	10
Alumni	2
Faculty	19
Graduate Student	37
Guest	2
Part-time	1
Staff	62
Undergraduate Student	177

Agenda

- Analytics Roles
- ETL – Extract, Transform, and Load
- Folder Structure
- Dashboards
- Create a (very basic) Report
- **How Reports are “Consumed”**



Additional Resources

Conclusion

Documentation and Training

Alma Analytics Documentation

Alma > Help menu > Browse Online Help > Analytics

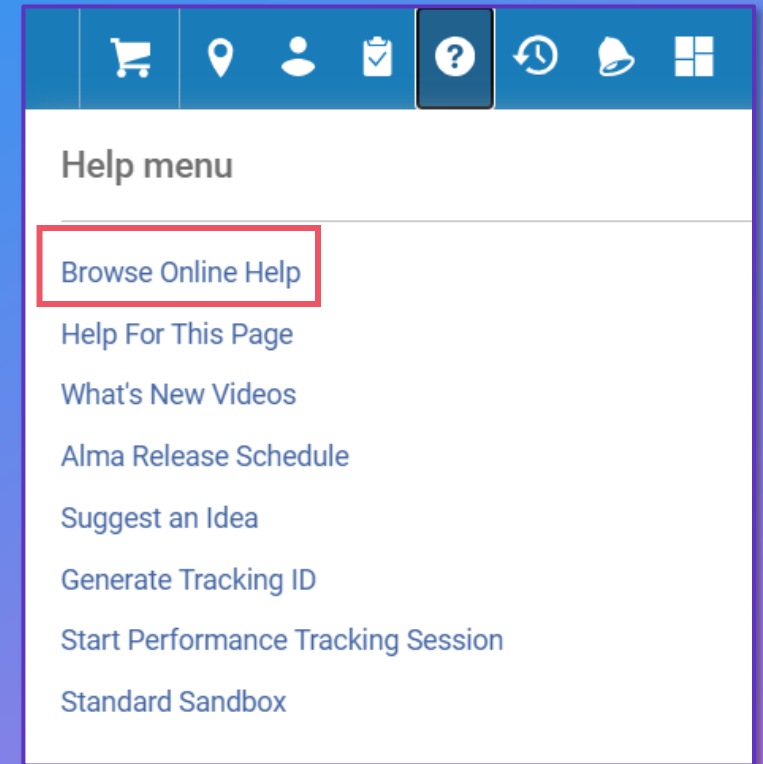
Alma Analytics Subject Areas

Alma > Help menu > Browse Online Help > Analytics >
Alma Analytics Subject Areas

Training Videos

Knowledge Center > Alma > Training > Analytics

Ex Libris YouTube Channel – search for Alma Analytics



Additional Resources and Session Recording

Alma Analytics: Become an Expert

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Register for all APAC time zone-friendly sessions [HERE](#)

Register for all EMEA time zone-friendly sessions [HERE](#)

Register for all Americas time zone-friendly sessions [HERE](#)

Session Number	Session Name	Description	Additional Resources	APAC	EMEA	AMERICAS
01	Overview and Introduction to Analytics	This session will include: - Accessing and "consuming" analytics - Roles - ETL - Extract, Transform, and Load - Folder structure of ready-to-use reports - Dashboards	Presentation slides and exercises available Sep. 18, 2024 - More documentation and training resources: Documentation Analytics Subject Areas	Registration link Wednesday, 18 September 2024 10:00 AM - 11:30 AM Sydney Other times and dates	Registration link Wednesday, 18 September 2024 2:00 PM - 3:30 PM London Other times and dates	Registration link Wednesday, 18 September 2024 10:00 AM - 11:30 AM Los Angeles Other times and dates



Next Week

Physical Inventory, and Fulfillment

- Review default reports and dashboards
- Customize default reports
- Create new reports
 - Items missing or lost more than x months ago
 - Duplicate barcodes
 - Most-requested items

and more!

Exam and Certificate of Completion

- Optional, short (10-question) exam to test your knowledge
- Available after the last session (Nov. 6)
- Answer 80% correct or more → Certificate of Completion for the series





Thank You!

Please fill out the survey that will appear
when you close the WebEx meeting

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