



ULMS Assessment & Analytics Open Forum

November 2, 2023

New Layout for Alma Analytics: A Refresher



SJSU | KING LIBRARY

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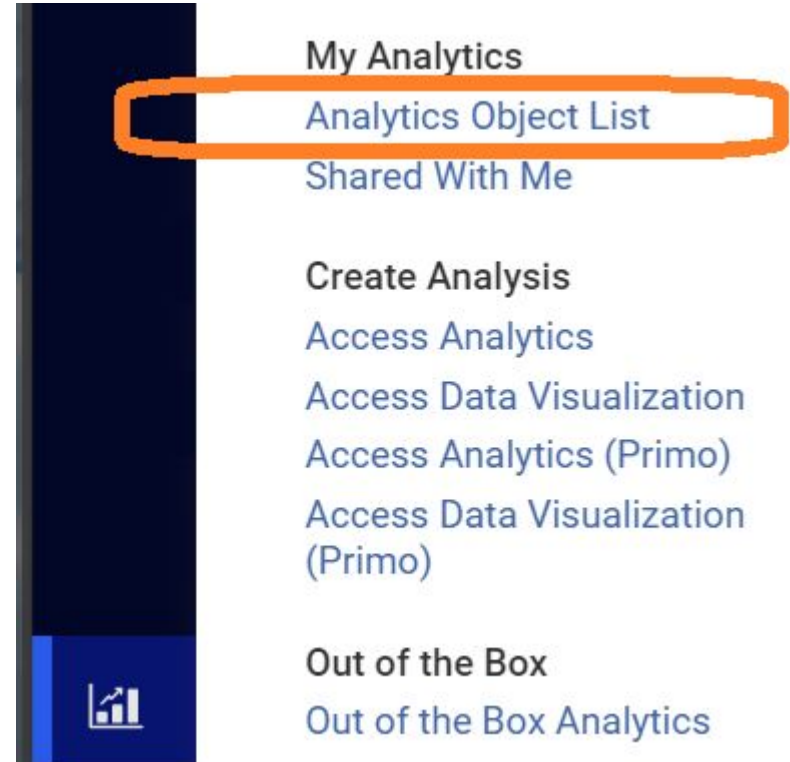
Documentation on Analytics New Layout

- The New Layout will be the only Analytics layout starting Nov 5th
- Known Issues
 - [Transitioning to the Analytics New Layout](#)
 - All resolved or no longer applicable
- Online Help
 - [Navigating Analytics](#)
 - Analytics Consumers
 - Analytics Administrators and Designers
 - [Working with Analytics Objects](#)
 - For Analytics Administrators



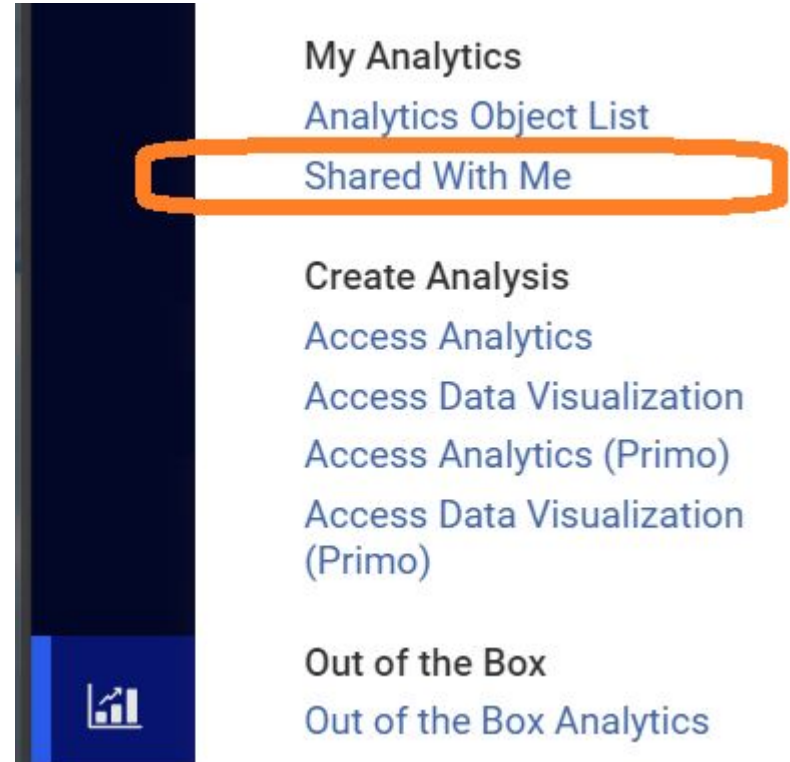
My Analytics - Analytics Objects List

- For Analytics Administrators
- Lists all analytics objects that you can manage



My Analytics - Shared With Me

- For Analytics Consumers
- Lists all analytics objects that you have access to view or subscribe to
- Replaces
 - “Subscribe to Analytics” section in the old UI.
 - List of reports that were directly on the Analytics menu in the old UI
- All reports in one place
- The list can be searched and filtered



Shared With Me - Search & Filter

- Search by: Name, Description, Creator and more.
- Sort by: Name, Creator, Date and more.
- Filter by: Object Type, Badge Type, Subject Area and more.

The screenshot displays the 'Shared With Me' interface with three highlighted sections:

- SEARCH (Blue box):** A search dropdown menu is open, showing options: Name, Location, Object Creator, Description, and Report Name.
- SORT (Green box):** A sort dropdown menu is open, showing options: Name, Location, Object Creator, Object Creation Date, and Object Modification Date.
- FILTER (Yellow box):** A filter dropdown menu is open, showing options: All, Dashboard, Data Visualization Workbook, Report, Scheduled, Widget, Subscribed, and Homepage Dashboard.

At the bottom of the interface, the text 'SEARCH' is written in large blue letters, 'SORT' in large green letters, and 'FILTER' in large orange letters. The background shows a list of items with columns for Name, Location, Object Creator, Object Creation Date, Object Modification Date, and Type. The top navigation bar includes 'Shared With Me (1 - 20 of 78)' and various filter controls like 'Source System: All', 'Badges: All', and 'Subject Area: All'.

Shared With Me - View full report & Report Preview

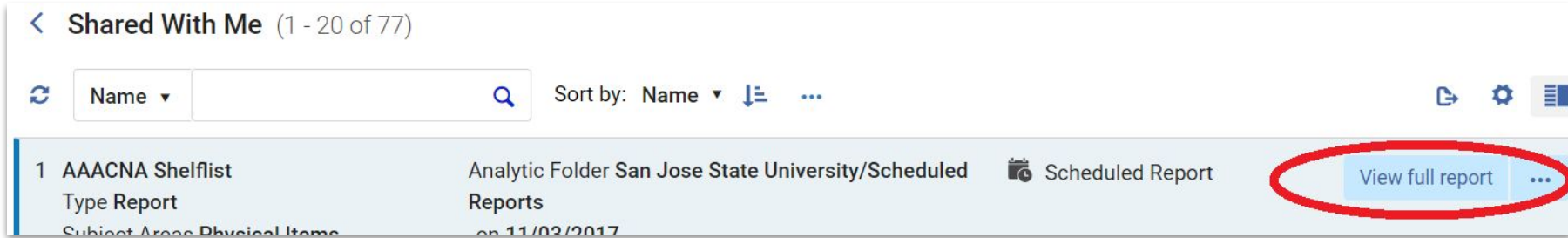
< Shared With Me (1 - 20 of 77)

Refresh Name Search Sort by: Name [Sort Icon] [More Icon]

1 AAACNA Shelflist Analytic Folder San Jose State University/Scheduled Scheduled Report **View full report** [More Icon]

Type Report Reports

Subject Areas Physical Items on 11/03/2017



< Shared With Me (1 - 20 of 78)

Refresh Name Search Sort by: Name [Sort Icon] [More Icon] Type: All Source System: All Badges: All Subject Area: All [Share Icon] [Settings Icon] [List Icon]

1 AAACNA Shelflist [Report Icon] **View full report** Pin to Analytics Menu

Type Report

Subject Areas Physical Items

Actions

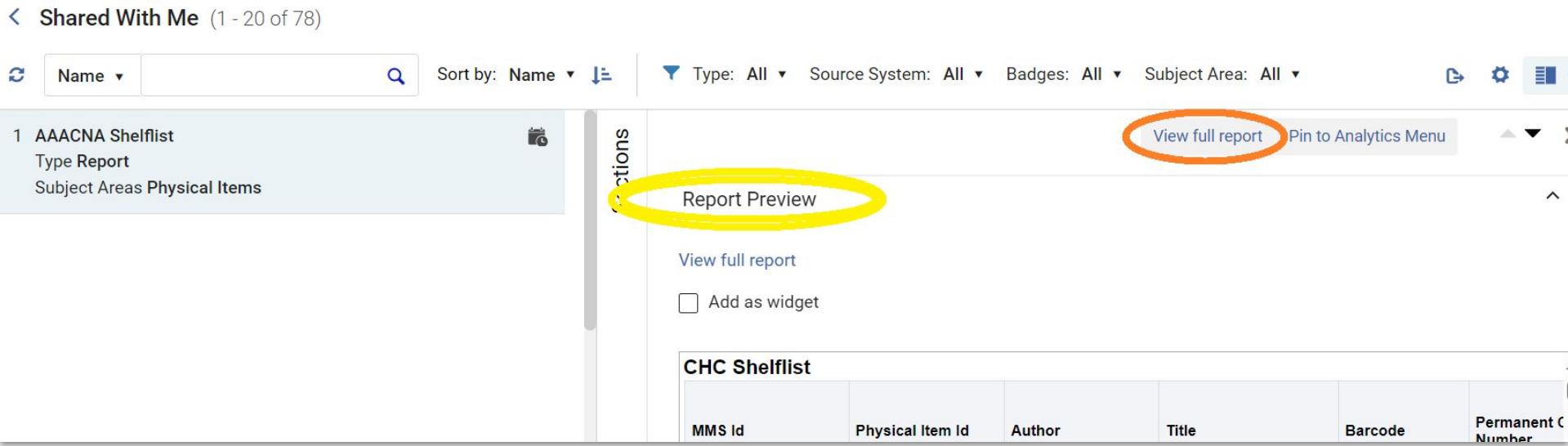
Report Preview

View full report

Add as widget

CHC Shelflist

MMS Id	Physical Item Id	Author	Title	Barcode	Permanent C Number
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Shared With Me - View object details & Subscribe to object

< Back to list

View full report

Pin to Analytics Menu



Summary

Schedule

Report Preview

AAACNA Shelflist

Type Report

Subject Areas Physical Items

Description Inventory/shelf list for items at aca;acc;ace;acn;acr;acs locations w/ loan count measures. No date filter used.

Report URL <https://csu-sjsu.alma.exlibrisgroup.com/ng/hashed/F086369B34058F0808D747B0D854BC47EF6A2B69>

Analytic Folder San Jose State University/Scheduled Reports

on 11/03/2017 09:31:52 AM GMT-7

Object modified by Lee, Jung Ah on 10/24/2023 03:46:38 PM GMT-7

Schedule

This analytics object was scheduled in the old UI: On the 02 of every month at 04:00



Subscribe to the analytics object

Pinned Objects

- Replaces
 - List of Reports that were directly on the Analytics menu in the old UI
- “No Analytics Objects were Pinned” message appears at first



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

Out of the Box Analytics

Search Analytics Objects



No Analytics Objects were Pinned

Add by selecting "Pin to Analytics Menu" from the object actions available in the list

Or

Pin objects from the search results above

Pin to Analytics Menu

< Shared With Me (1 - 20 of 77)

Name	Sort by: Name
1 AAACNA Shelflist Type Report Subject Areas Physical Items	Analytic Folder San Jose State University/Scheduled Reports on 11/03/2017 Object modified by Lee, Jung Ah on 10/24/2023	Scheduled Report	View full report ...
2 Access Services Dashboard Type Dashboard Subject Areas Borrowing Requests, Course Reserves, Fines and Fees, Fulfillment, Lending Requests, Physical Items, Users	Analytic Folder San Jose State University/Dashboards on 12/15/2017 Object modified by Lee, Jung Ah on 09/28/2023		View full report ... Pin to Analytics Menu
3 Acquisitions Database Renewal Type Dashboard Subject Areas Funds Expenditure	Analytic Folder San Jose State University/Dashboards on 02/04/2022 Object modified by Lee, Jung Ah on 09/28/2023		View full report ...

Pinned Objects

- Analytics menu with items in the Pinned Objects
- Drag & drop to change order.
- Click on “X” to remove.



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

Out of the Box Analytics

Search Analytics Objects

Pinned Objects

- 1 Access Services Dashboard
- 2 Acquisitions Database Renewal
- 3 Administrator Dashboard
- 4 Books Last Copy - Institution
- 5 Circulation Statistics Dashboard
- 6 Collection Development Database Renewals
- 7 Endowments
- 8 eResource COUNTER Usage Dashboard
- 9 Expenditures Dashboard
- 10 Flagged Usage
- 11 Inventory Dashboard
- 12 Leganto Dashboard (DRAFT)

Create Analysis

- For Analytics Designers
- Access Analytics
 - Replaces: Design Analytics
- Access Data Visualization
- Access Analytics (Primo)
- Access Data Visualization (Primo)



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

Out of the Box Analytics

Out of the Box Analytics

- Now in their own section
- No longer listed together with the analytics reports & dashboards that were put together by your institution
- To add other Out-of-the-Box dashboards to this section, contact your institution's Alma Analytics Administrator.



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

[Out of the Box Analytics](#)

Search Analytics Objects

- Search using the search box
- Searches all analytics objects that you have access to.
- The top section lists your institution's analytics objects
- The bottom section lists Out-of-the-Box dashboards



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
Out of the Box Analytics

Search Analytics Objects

Search Results

- Electronic **Usage** Title Search
- 📌 Flagged **Usage**
- 📌 eResource COUNTER **Usage** Dashboard

- Leganto Student **Usage**
Usage via Alma Link Resolver

Add New Alma/Primo Analytics Object

- For Analytics Administrators
- From Analytics Objects List
- Select a folder from Analytics and a report from that folder.
- Click Save

< Analytics Object List (1 - 20 of 81)

<input type="checkbox"/>	Name ▾	Sort by: Name ▾	⌵	⋮
1 <input type="checkbox"/>	AAACNA Shelflist Type Report Subject Areas Physical Items	Analytic Folder San Jose State Uni Reports on 11/03/2017 Object modified by Lee, Jung A		
2 <input type="checkbox"/>	Access Services Dashboard Type Dashboard Subject Areas Borrowing Requests, Course Reserves, Fines and Fees, Fulfillment, Lending Requests, Physical Items, Users	Analytic Folder San Jose State Uni on 12/15/2017 Object modified by Lee, Jung A		
3 <input type="checkbox"/>	Acquisitions Database Renewal Type Dashboard	Analytic Folder San Jose State Uni on 02/04/2022		

Actions ▾

X Add New Alma Analytics Object ▶
Add New Primo Analytics Object ▶
Remove Object from List

View full report ...

View full report ...

New Analytics Object - Edit Report/Object

- May take a while for the details page to display

[Back to list](#)

[View full report](#) [Remove Object from List](#) [Pin to Analytics Menu](#)

Summary*

Share

Schedule

Report Preview

Edit Report

Analytic Folder*	Description	Object Creator
Primo San Jose State University/D...	<i>Enter Text Here</i>	Lee, Jung Ah
Report Name*	Type	Object Creation Date
Test Primo Dashboard	Dashboard	10/24/2023 03:52:48 PM GMT-7
Display Name*	Subject Areas	Object Modification Date
Test Primo Dashboard	-	10/27/2023 11:30:00 AM GMT-7

[Reset](#) [Save](#)

Share

New Analytics Object - Share

- Can share the object by adding individual users, roles or profiles.



The screenshot shows a user interface for sharing a new analytics object. On the left, there is a vertical navigation menu with the following items: Summary, Share (highlighted with a blue bar), Schedule, and Report Preview. The main content area is titled 'Share' and contains two sections: 'Internal Users' and 'Roles'. The 'Internal Users' section has a button labeled '+ Add Users'. The 'Roles' section has two buttons: '+ Add Roles' and '+ Add From Profiles'. In the top right corner, there are three buttons: 'View full report', 'Remove Object from List', and 'Pin to Analytics Menu'. A yellow rectangular box highlights the 'Internal Users' and 'Roles' sections. An orange rectangular box highlights the '+ Add Users' button. Another orange rectangular box highlights the '+ Add Roles' and '+ Add From Profiles' buttons. At the bottom of the page, the word 'Schedule' is partially visible.

New Analytics Object - Schedule

Schedule

Schedule Report


Schedule

Schedule Report

Recurrence Pattern **Weekly** Every **Monday** At **09:00**

Delivery option **Attachment** FTP
Format **PDF**

Subscribe to the analytics object

 Edit Schedule ✕

Recurrence Pattern **Weekly** Recur every (week(s)) **1** At **09:00**

Next run on

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Reports Scheduled in the Old Layout

- The schedules of the reports that were scheduled in the Old Layout are carried over to the new UI.
- The Schedule section of these reports will indicate that they were scheduled in the old UI.
- Toggle the Schedule Report button to change the schedule.

Schedule

This analytics object was scheduled in the old UI: **On the 02 of every month at 04:00**
To change this scheduling, toggle "Schedule Report"



Schedule Report

Reports Scheduled in the New Layout

- Each report/dashboard scheduled in the New Analytics Layout runs as its own job.
- Under Monitor Jobs, the job name for these scheduled reports will be “Schedule of Analytics reports and dashboards” followed by the report/dashboard name.

130	Schedule of Analytics reports and dashboards - PO Line Items (New Resources)
131	Schedule of Analytics reports and dashboards - Patrons with Patron Role Expiration Date

Enhanced Manage Subscriptions Section

- Will be released in the November release.
- No longer a separate page
- Is a section within the Analytics Objects details page
- Below the Schedule section

The screenshot displays the 'Manage Subscriptions' section within the Analytics Objects details page. On the left, a vertical navigation menu includes 'Summary', 'Share', 'Schedule', 'Manage Subscriptions' (highlighted with a red box), and 'Report Preview'. The main content area is titled 'Schedule' and contains the following settings:

- Schedule Report:** A toggle switch is turned on.
- Recurrence Pattern:** Weekly, with a frequency of 'Every Monday At 09:00'.
- Delivery option Attachment Format:** PDF, with a checkbox for 'FTP' that is currently unchecked.
- Subscribe to the analytics object:** A toggle switch is turned off.

At the bottom of the 'Schedule' section, there is a 'Manage Subscriptions' header (highlighted with a red box) and a '+ Add Subscribers' button.

Data Visualization Workbook as your Alma Homepage

[← Back to list](#)

[View full report](#) [Remo](#)

Summary

Share

Schedule

Primo Internal Dashboard DV

Type Data Visualization Workbook

Analytic Fo

Visualizatic

Subject Area Primo Action Usage Primo Device Usage Primo

Report Preview

[View full report](#)

Add as a Homepage Dashboard

- Create an analytics object from a Data Visualization Workbook.
- Check the “Add as a Homepage Dashboard” box

Data Visualization Workbook as your Alma Homepage

- Select Quicklinks/Favorites menu.
- Under My Homepage, select the name of the Data Visualization Workbook object to set as your Alma Homepage.

