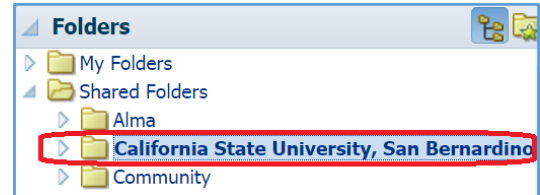


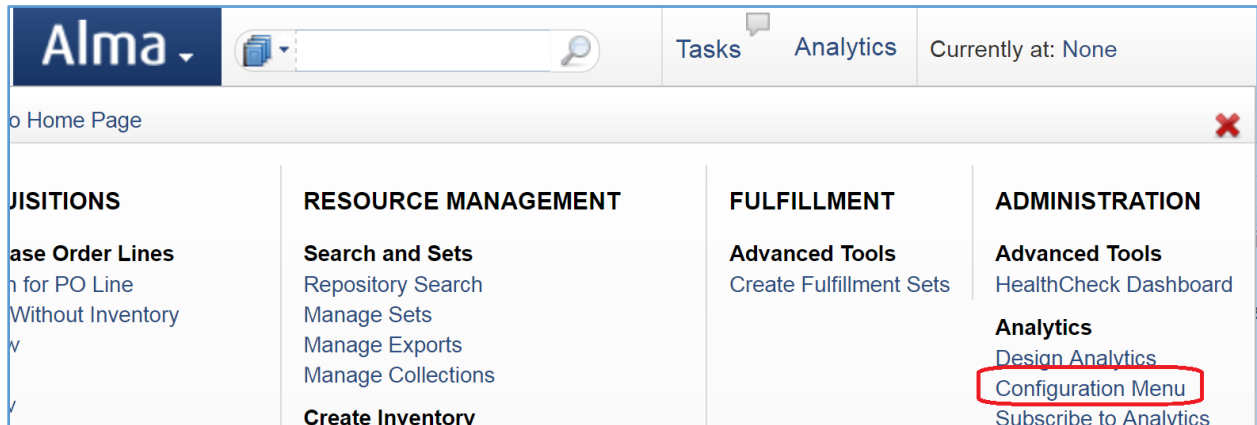
Lesson 6: Widgets

Not everyone will have the ability to enter Alma Analytics and create queries and reports. However, users without that role can see the results of a query using widgets. A widget is a saved query that displays real-time data on a user's Alma dashboard, which is an individual Alma home page. You can also save a widget to your own dashboard for quick access.

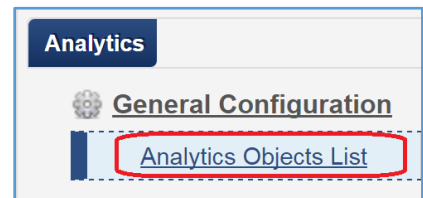
First, you must have created a query and saved it to your library's shared folder in Analytics.



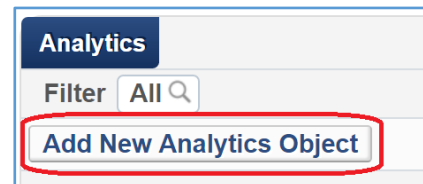
To create a widget from that saved query, you must click the Analytics "Configuration Menu" link, located where you enter Analytics from Alma, instead of using the "Design Analytics" link.



Click the "Analytics Object List" link.



Click the button "Add New Analytics Object."

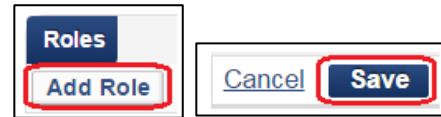


Using the form that appears:

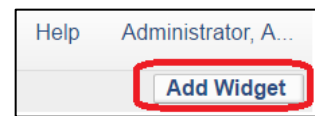
| | | | |
|--------------------------|---|------------------------|---|
| Title * | <input type="text"/> | Name * | <input type="text" value="Acquisitions Dashboard"/> |
| Analytic Folder * | <input type="text" value="Alma/Acquisitions/Dashboards"/> | | |
| Type * | <input type="text" value="Widget"/> | | |
| Description | <input type="text"/> | | |
| Roles | | Cancel | Save |
| Add Role | | | |

- Name the widget with the Title field
- Use both the Analytic Folder drop-down to find the file in your library's shared folder
- Use and the Name drop-down to select the widget
- Change type drop-down to "Widget"
- Fill in the "Description" field with details to describe the widget's report in detail for users


Click the "Add Role" button to define the role of the staff user who can add this widget to their dashboard in Alma. After selecting the roles to access this widget, click the "Add Role" button again, then the "Save" button. Both are located in the upper-right-hand corner.



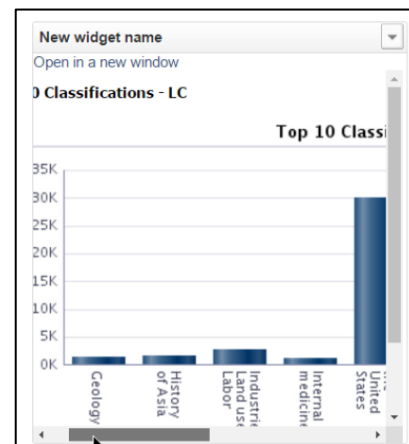
Once you have created the widget, a staff user with the defined role may go to their Alma dashboard and click the "Add Widget" button in the upper-right-hand corner. Click next the faint yellow checkmark (circled) next to the widget's name so that you see the checkmark darkened (squared), then click the "Close" button.



| Active | Widget name | Description |
|-------------------------------------|------------------------------------|--|
| <input checked="" type="checkbox"/> | Notifications | Notifications Widget |
| <input checked="" type="checkbox"/> | Organization Calendar | Calendar Widget |
| <input checked="" type="checkbox"/> | System Job Dashboard | The System Job Dashboard widget is deprecated and will be removed in the March release |
| <input checked="" type="checkbox"/> | Scheduled Jobs Status | The Scheduled Jobs Status Dashboard widget presents the status of scheduled jobs for the last 5 days |
| <input checked="" type="checkbox"/> | Primo Dashboard | Primo Dashboard Widget |
| <input checked="" type="checkbox"/> | Consortia Member Links | Consortia Links Widget |
| <input checked="" type="checkbox"/> | Sandbox(es) | Link to the sandbox environment/s that are available for your use |
| <input checked="" type="checkbox"/> | Expenditures per material type YTD | Expenditures per material type YTD |
| <input checked="" type="checkbox"/> | New widget name | detailed description of fields included and display of those fields |
| <input checked="" type="checkbox"/> | Top 5 vendors spending YTD | Top 5 vendors spending YTD |

 [Close](#)

The widget has appeared on the dashboard providing real-time information.



Activity 6-1

If you don't have a report of your own, use one of the canned reports from Shared Folders>Alma. Save it to your library's shared folder. Create a widget from the report, then add that widget to your Alma dashboard.

View it embedded in your dashboard. Open it in a new window using the link provided. If you do not wish to keep that widget on your dashboard, use the drop-down option to remove it from your dashboard.