Lesson 12: Alma Analytics My Dashboard

A dashboard is a tool, a layout, for collecting reports into a single area for easier use. In Alma, there can be many dashboards. One dashboard is open to anyone who logs into Alma. This can be altered to suit the user's needs and is found on the opening screen after entering Alma.
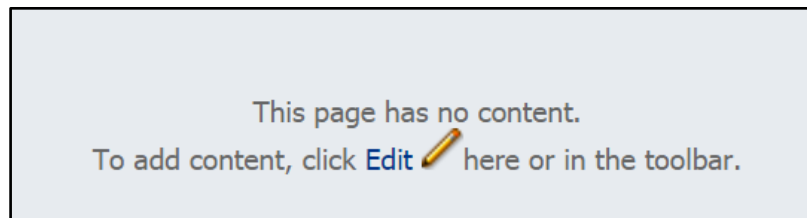

The second is the Alma Analytics My Dashboard, which has some additional functionality.

This tutorial will focus on the Alma Analytics My Dashboard, which acts as is your personal Alma Analytics page to quickly access your most used reports. When you begin in Alma Analytics, your My Dashboard will be empty.

As you explore Alma Analytics, you will add reports. To do so, you will need to edit My Dashboard.

To edit My Dashboard, use the dropdown menu in the upper right-hand corner and select "Edit Dashboard" or use the link in the "no content" message.
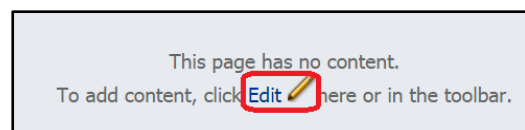
Once you are in the My Dashboard editor, called the Dashboard builder, you can start to add reports from your "My Folders" area or using the Shared Folders by dragging and dropping them into the center panel, the Page Layout area.
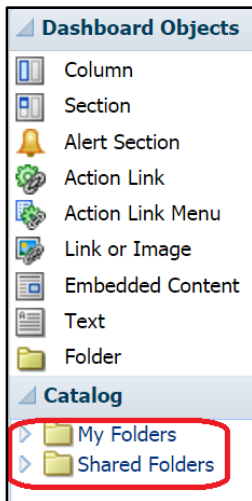
If you have many reports to run, you may want to have several pages on My Dashboard to group your reports. You might organize chronologically, such as reports needed daily, weekly, monthly, quarterly, and annually, similar to this example. Or you might choose thematically, such as staff productivity, clean-up projects, and quality review. Or create any page groupings you find most useful.
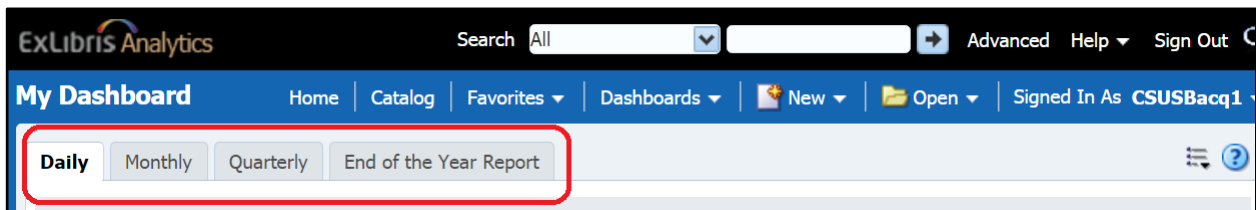
Use the toolbar at the top right of the screen to edit pages in the Dashboard builder (editor).
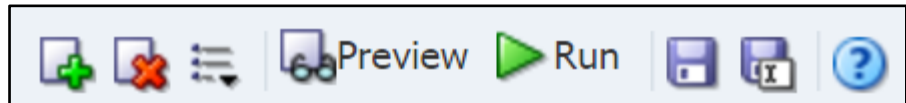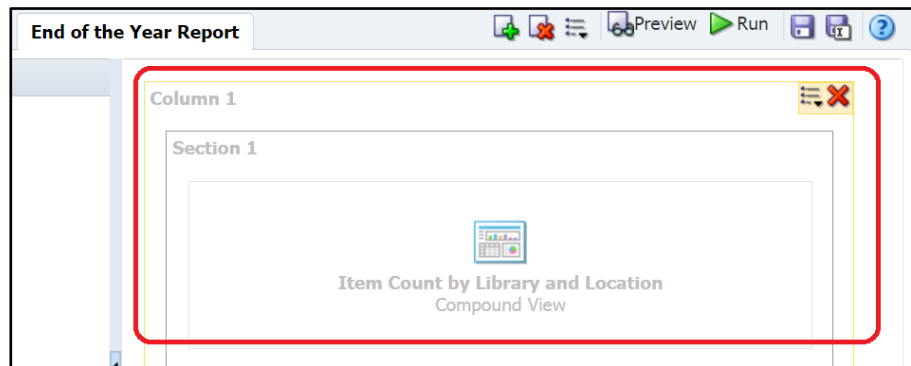

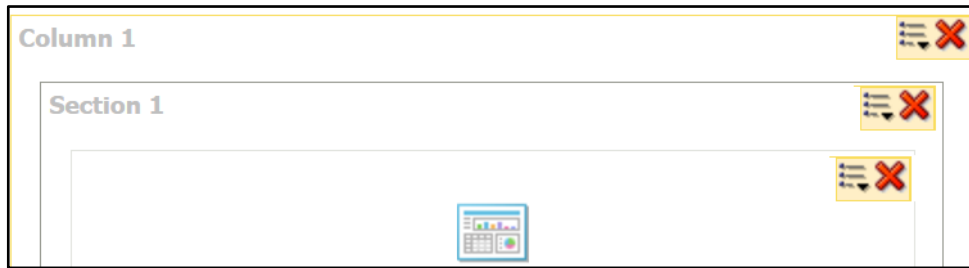 To add a page or tab to My Dashboard, click the green plus-sign.

 To delete a page or tab in My Dashboard, click the red X.

Dragging and dropping a report from "My Folders" or "Shared Folders" will look like this in the Page Layout area.

You may delete any item, section, or column, using the red X in each corner when you pass your mouse over the area.
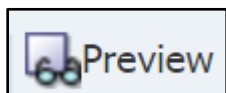

 Save the My Dashboard edits using the disk icon. **Advice**: *Save early and often when editing My Dashboard.*

Placing a series of reports from Alma Analytics into a My Dashboard page groups the reports, displaying one set of data after the next. It is useful but unattractive because it lacks titles, sub-titles, links, and other accompanying materials to introduce the data and analyze the data. Use the "Dashboard Objects" to add this content to the overall series of reports.

For example, to add text to introduce a report, drag and drop the "Text" icon from the Dashboard Objects into the Page Layout area above the report. This acts as a place holder for text you wish to add. To add text to the placeholder, click the Text Properties button in the upper right of the object. It is labelled with "XYZ."
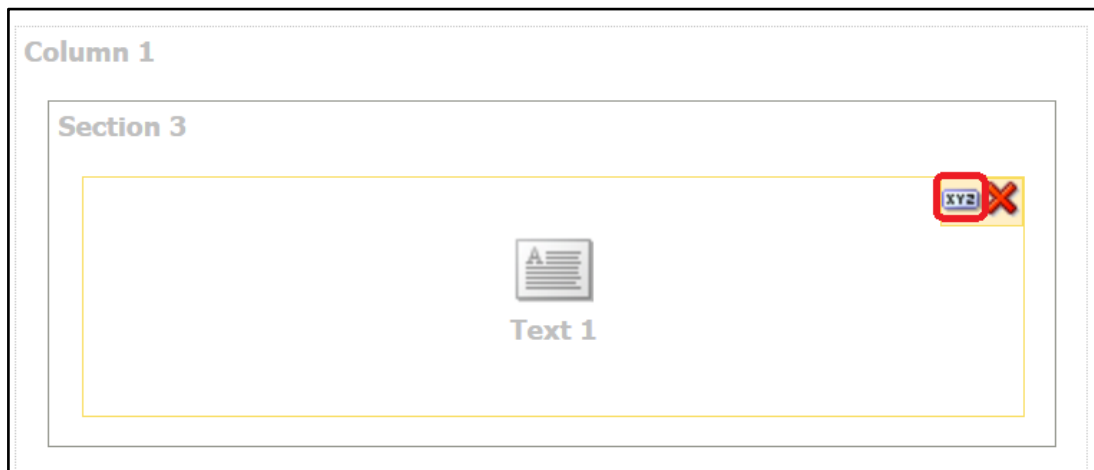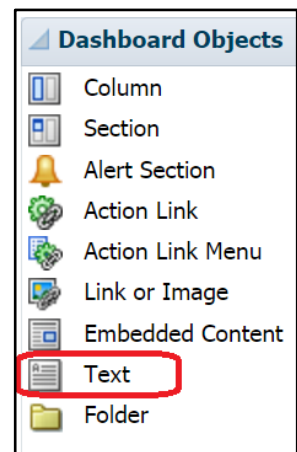
Using the Text Properties box, you may add text so the data from the report can be introduced and clarified. You may edit the plain text using the HTML buttons to bold, italicize, underline, and insert a line break. Or you may put in your own HTML markup, then check the "Contains HTML Markup" box.

 Click the Preview button it to be sure it looks the way you intended. Then click "OK."
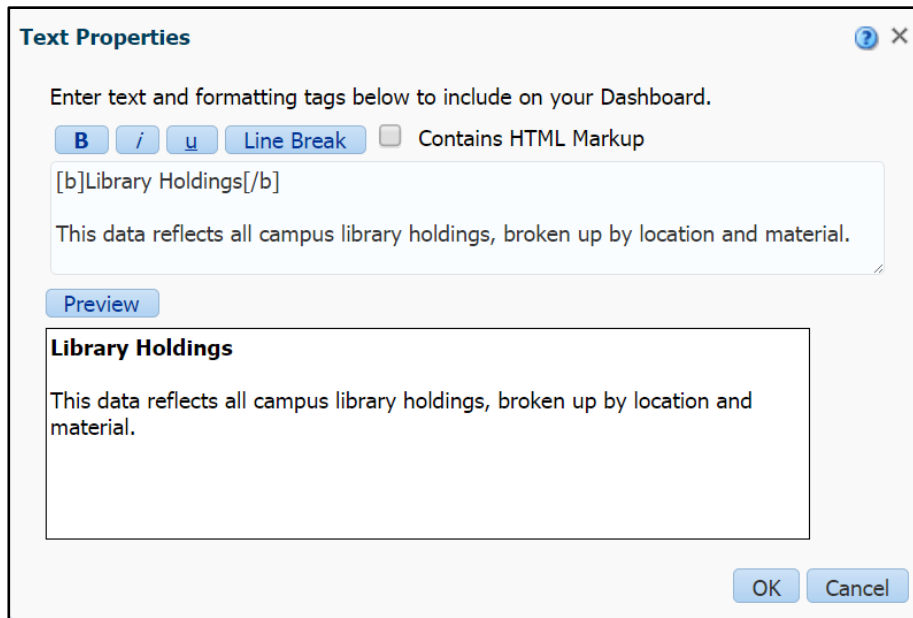
Text Properties ⑦ ✕

Enter text and formatting tags below to include on your Dashboard.

[**B**] [*i*] [u] [Line Break] ☐ Contains HTML Markup

[b]Library Holdings[/b]

This data reflects all campus library holdings, broken up by location and material.

[Preview]

Library Holdings

This data reflects all campus library holdings, broken up by location and material.

[OK] [Cancel]
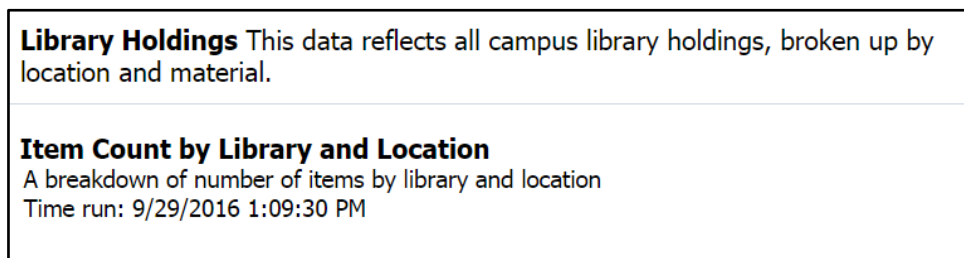
  Save the My Dashboard edits using the disk icon. **Advice**: *Save early and often when editing My Dashboard.*

In this example, notice that, though the Text Properties Preview button didn't indicate it, I need to insert a line break after the "Library Holdings" header.

Library Holdings This data reflects all campus library holdings, broken up by location and material.

Item Count by Library and Location
A breakdown of number of items by library and location
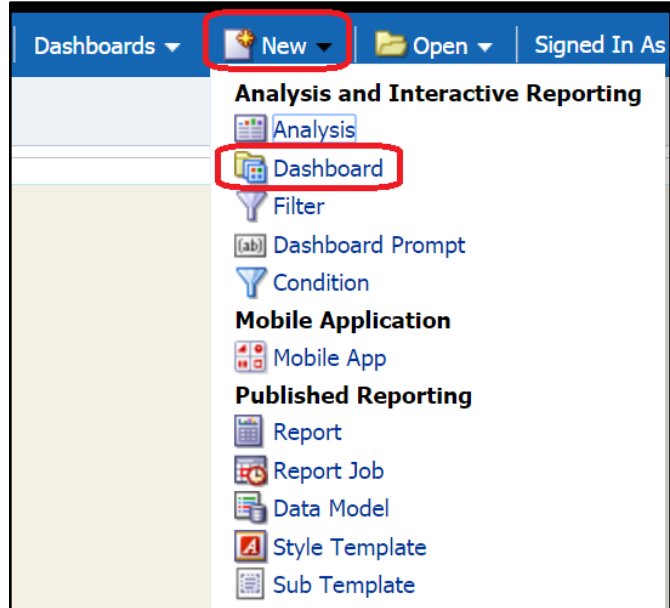Time run: 9/29/2016 1:09:30 PM

  If you choose to run the My Dashboard page, and its reports, click the green arrow in the toolbar. If it contains several reports or large reports, this will take time. Also, you will leave the Dashboard builder mode of My Dashboard.

Lastly, you are not limited to a single dashboard. You can create a new dashboard or copy a dashboard from "Shared Folders."

To create a new dashboard, enter Alma Analytics, click the "New" drop-down menu in the toolbar, then Dashboard.

In the New Dashboard window, you may name the new dashboard, provide a description, choose where to save the new dashboard, and decide if you will work on the content now or later.

| Dashboards ▼ | New ▼ | Open ▼ | Signed In As |

Analysis and Interactive Reporting
- Analysis
- Dashboard
- Filter
- [ab] Dashboard Prompt
- Condition

Mobile Application
- Mobile App

Published Reporting
- Report
- Report Job
- Data Model
- Style Template
- Sub Template

New Dashboard ⑦ ✕

Choose a name and location for the new dashboard

Name |

Description

Location /shared/Alma/Dashboards ▾

Content ● Add content now ○ Add content later (Create empty dashboard)

OK   Cancel