

# IOWA STATE UNIVERSITY

University Library

## Extending Alma Analytics Analysis with Tableau Vizzes

ELUNA - Spokane  
May 4, 2018



[Google Images](#)

# Today's presentation

Many Ex Libris customers use [Tableau Software](#) for business intelligence. Tableau provides a way to visualize data from various sources. In April of 2017 Ex Libris announced the availability of an open source [Web Data Connector](#) (WDC), which provides a mechanism to connect Tableau to Alma data via the Alma Analytics API.

# Today's presentation

This session will describe and demonstrate the process for connecting Tableau to the Alma Analytics API using the ExLibris WDC, and provide examples of Tableau visualizations (vizzes) that are based on data obtained through the WDC connection. Participants will leave the session with a basic understanding of the requirements for moving their Alma Analytics data into Tableau visualizations.

# Background

- In order to facilitate creating the connection from Tableau to Alma Analytics, Ex Libris has built a Web Page which can be “plugged in” to the Tableau Web Data Connector.
- Resources – ExLibris Knowledge Center

Home >> Alma >> Training >> Extended Training >> Presentations and Documents – Analytics

- [Analytics - Using Alma Analytics with the Tableau Web Data Connector.pptx](#)
- [Tableau Web Data Connector Ex Libris Developers Network Blog](#)
- [Alma Analytics and Tableau Web Data Connector Integration - Youtube video for Igelu SIWG](#)

Note: Excerpts from the ExLibris Knowledge Center materials used throughout this presentation

# Tableau options

1. Tableau Server
  - Enterprise (\$\$\$\$)
  - Online (\$\$\$)
  - **Public (Free)**
2. Tableau Desktop
  - Enterprise (\$\$\$)
  - **Public (Free)**

Tableau Desktop Download: <https://www.tableau.com/support/releases>

Tableau Public Download: <https://public.tableau.com/en-us/s/download>

Current Version: 2018.1

# WDC requirements -Three necessary elements

1. The URL of the ExLibris Tableau WDC web page
2. The API key which allows accessing Alma (or Primo) Analytics reports for your institution
3. The path and name of the Alma (Or Primo) Analytics report

# The three necessary elements - #1


- The first necessary element is the URL of the Tableau WDC web page:


Example:

<https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html>

# The three necessary elements - #2

- The second necessary element is the API key for your institution which allows access to analytics reports.

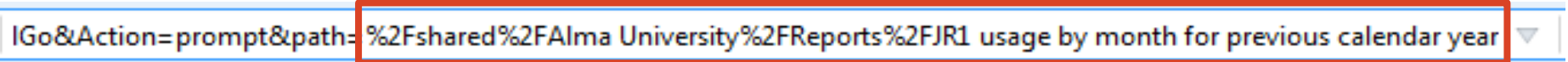
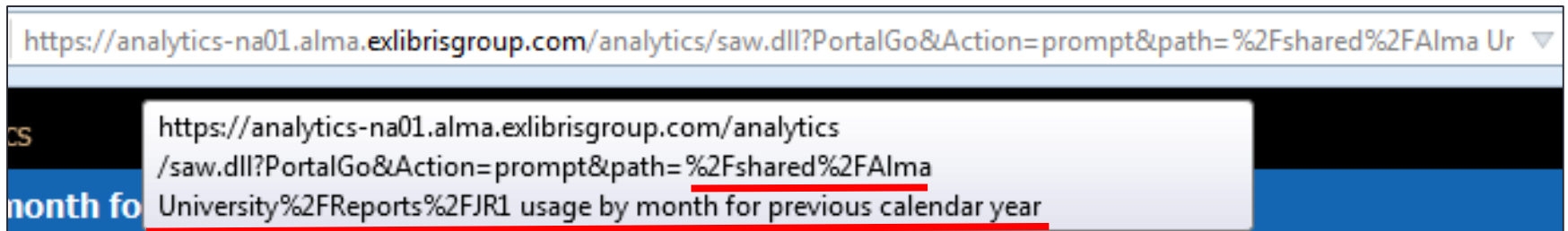
<input type="checkbox"/>	Application	API Key	Status	Platform
<input type="checkbox"/>	Analytics 	I7x [REDACTED] e84304be9 [REDACTED] e9f	Active	Integration

Application Information	<b>API Management</b>
<b>Current APIs *</b>	
API	Current Plan
<b>Analytics</b>	Unlimited Hits  Prod read/write



# The three necessary elements - #3

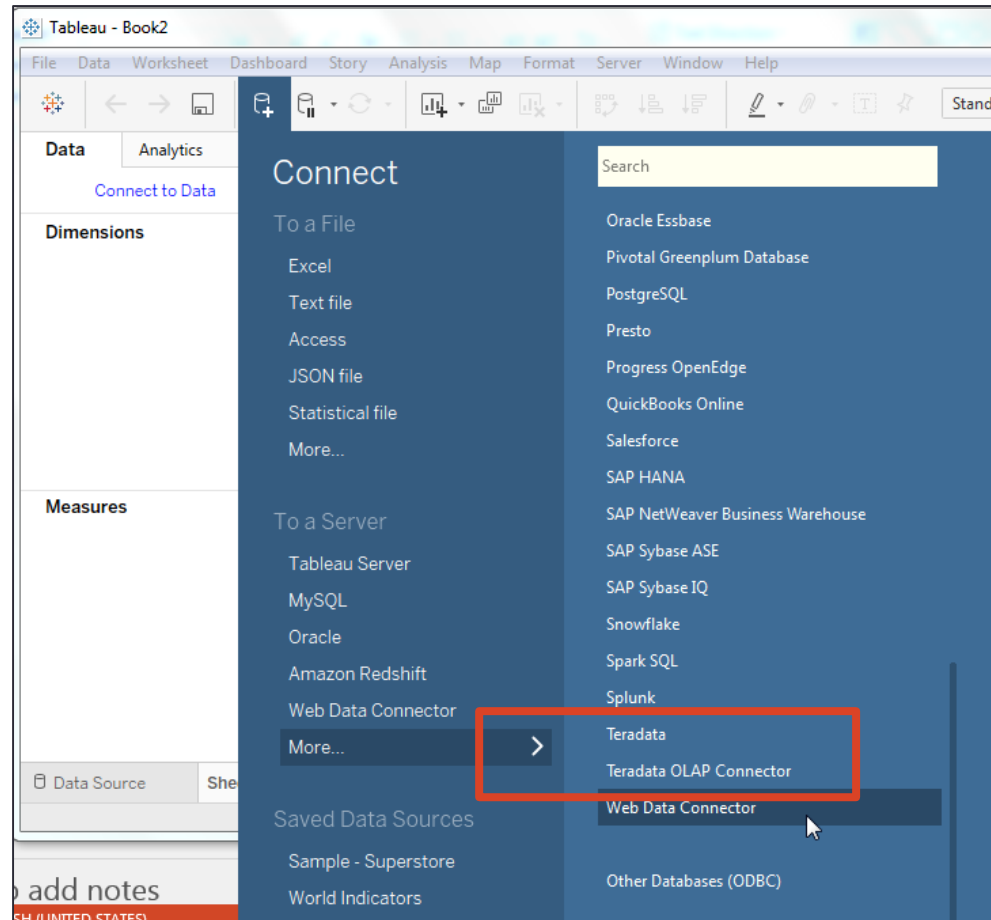
- The third necessary element is the path of the report.



The path is (and it can be with or without the escape characters, either / or %2F

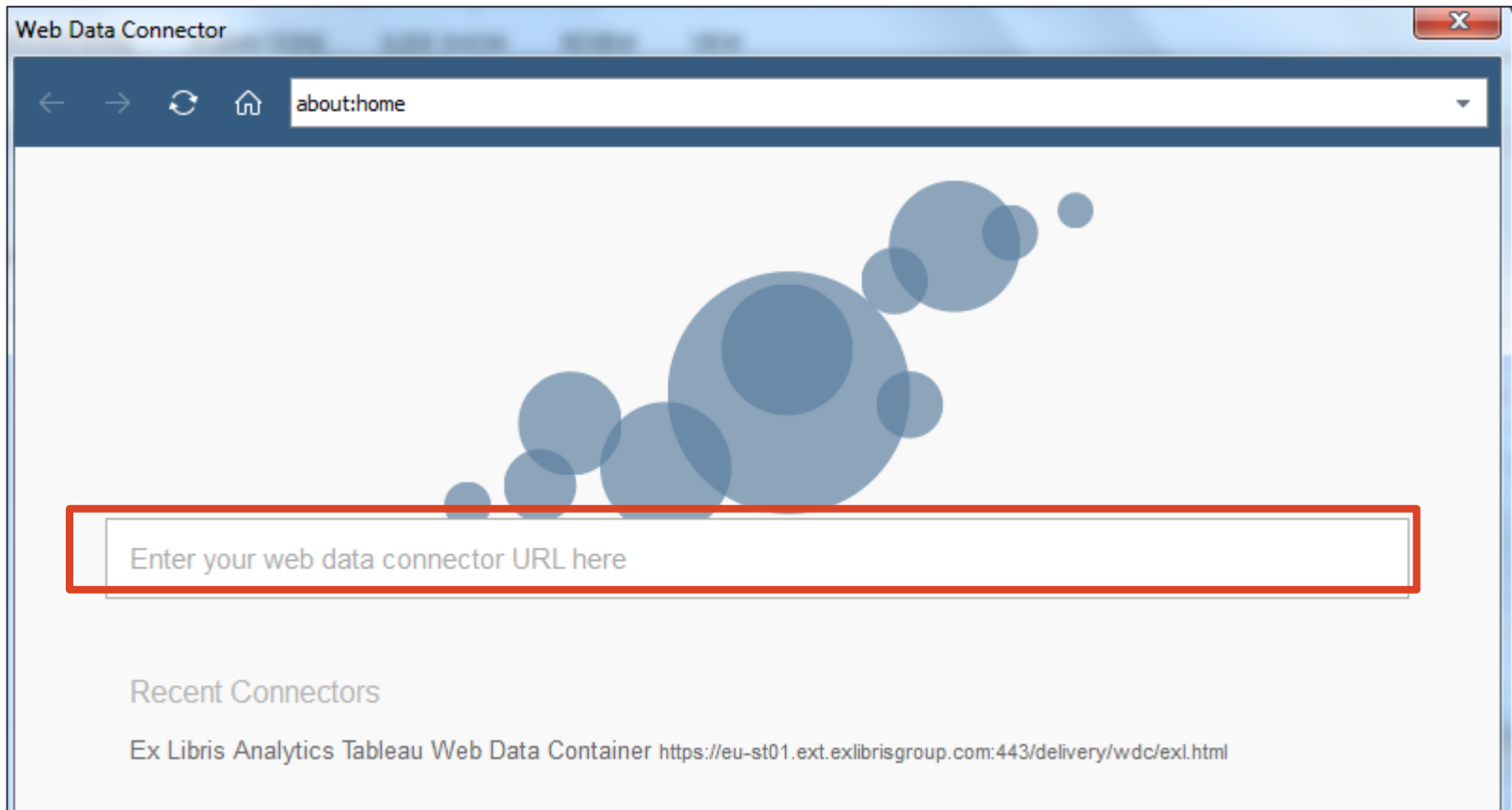
# Using the Tableau Web Data Connector (WDC)

- Start Tableau. In right hand column choose “Web Data Connector”



# The Tableau Web Data Connector

- Enter the URL which we already mentioned and hit enter:  
<https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html>



# The Tableau Web Data Connector

- Fill in the API Key, choose Alma or Primo, fill in path, choose your region, and click “Get data”

Ex Libris Analytics Tableau Web Data Container

https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html

## Ex Libris Tableau Web Data Connector

**API Key**

Remember key

**Application**  Alma  Primo

**Report Path**

The path (including the report name) of the Analytics report. Click on the search icon to search your report library. Alternatively, see this [blog post](#) for how to retrieve the path manually.

**Region**

**Max number of rows**

# The Tableau Web Data Connector

- For Alma Analytics --- Instead of manually filling in the report path you can also click the magnifying glass at the end of the field

Ex Libris Analytics Tableau Web Data Container

https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html

## Ex Libris Tableau Web Data Connector

**API Key**

Remember key

**Application**  
 Alma  Primo

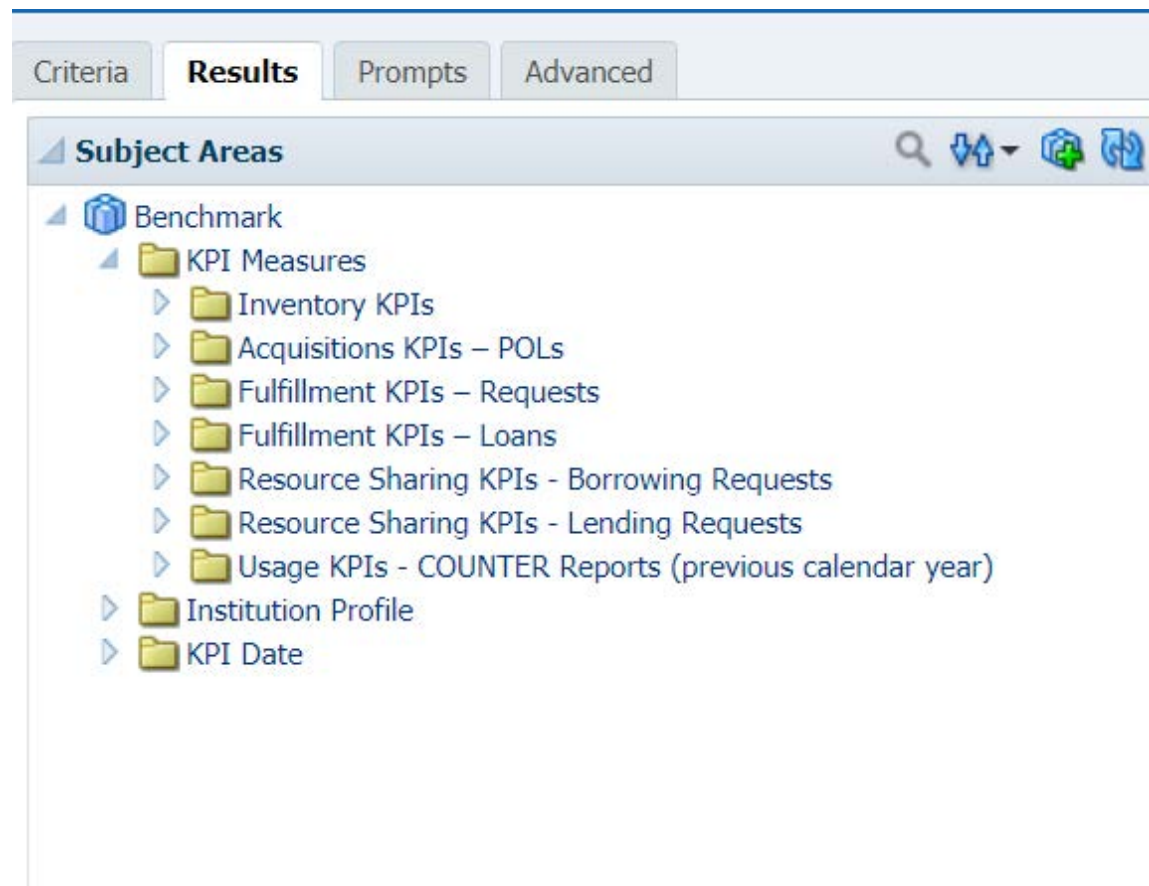
**Report Path**

The path (including the report name) of the Analytics report. Click on the search icon to search your report library. Alternatively, see this [blog post](#) for how to retrieve the path manually.

**Region**

**Max number of rows**

# Example 1 – Tableau dashboard using Alma benchmark data



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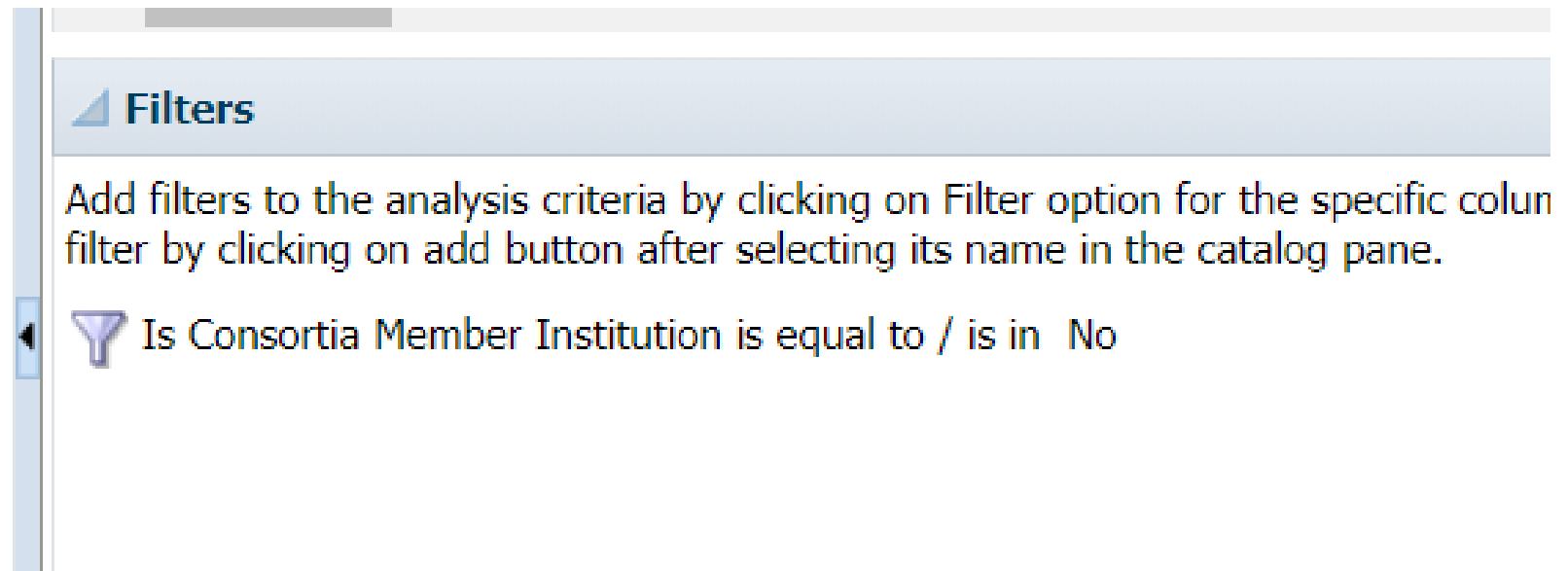
The screenshot displays the ExLibris Analytics interface within a web browser. The browser's address bar shows the URL: `analytics-na01.alma.exlibrisgroup.com/analytics/raw.dll?Answers&path=-%2Fshared%2FHowa%20State%20University%20Library%2FBenchmark%2FReports%2FAll%20KPIs%20exclude%20consortium#criteriaTab1630797228`. The dashboard title is "All KPIs exclude consortium".

The interface is divided into several panes:

- Criteria:** Includes tabs for "Criteria", "Results", "Prompts", and "Advanced".
- Subject Areas:** A tree view on the left showing "Benchmark", "KPI Measures", "Institution Profile", and "KPI Date".
- Selected Columns:** A central pane with instructions: "Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name." It lists columns from "Institution Profile" and "Inventory KPIs", including "Institution", "Institution Type", "Num of physical items in repository (total)", "Num of bibliographic records in repository (total)", "Num of electronic portfolios in repository (total)", "Num of electronic collections in repository (total)", and "Num of bibliographic records in repository added (by month)".
- Filters:** A pane with instructions: "Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane." It shows a filter: "Is Consortia Member Institution is equal to / is in: No".
- Catalog:** A bottom-left pane with a "List" dropdown set to "All" and folders for "My Folders" and "Shared Folders".

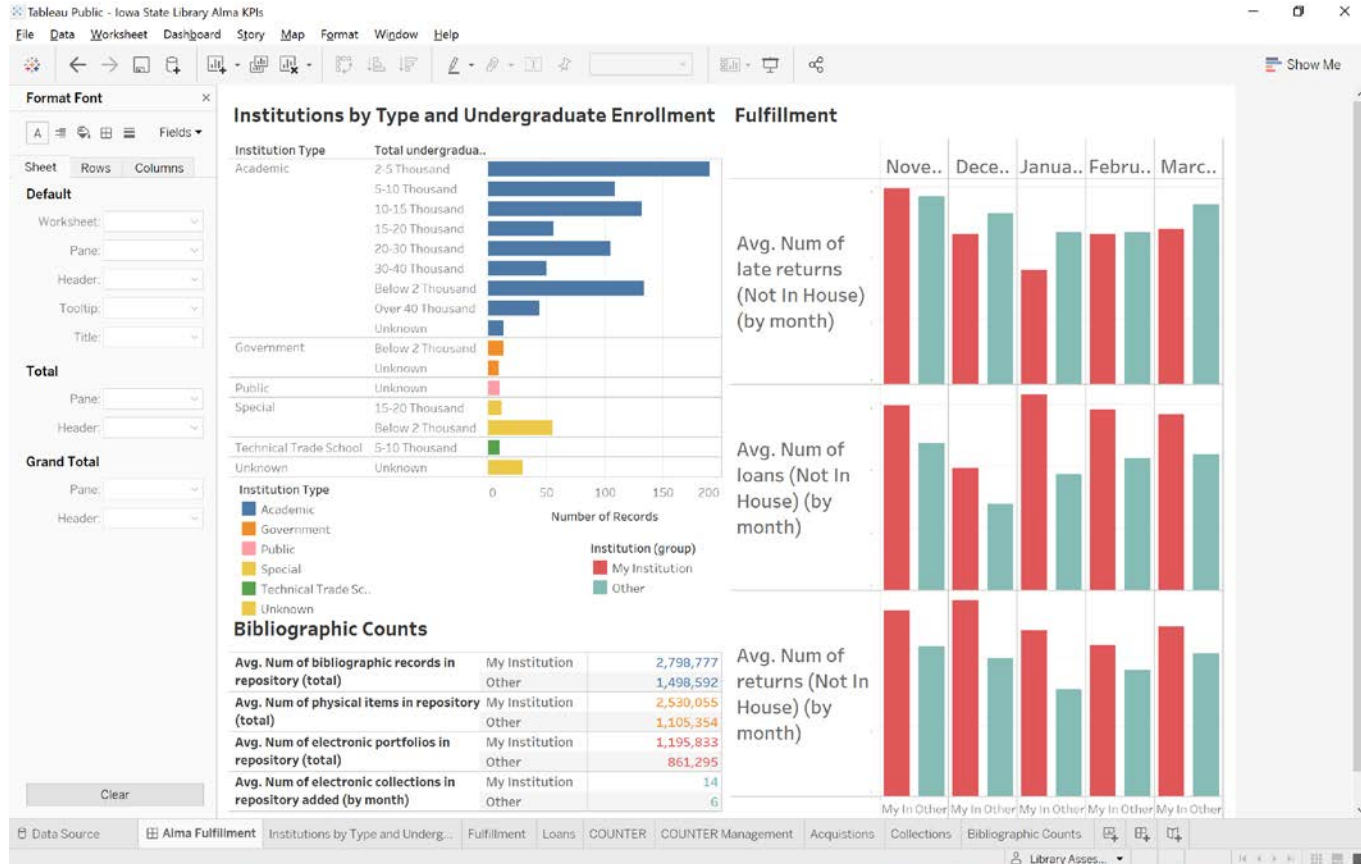
The top navigation bar includes "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", and "Signed In As: davisgr@iastate.edu".

# Example 1 – Tableau dashboard using Alma benchmark data

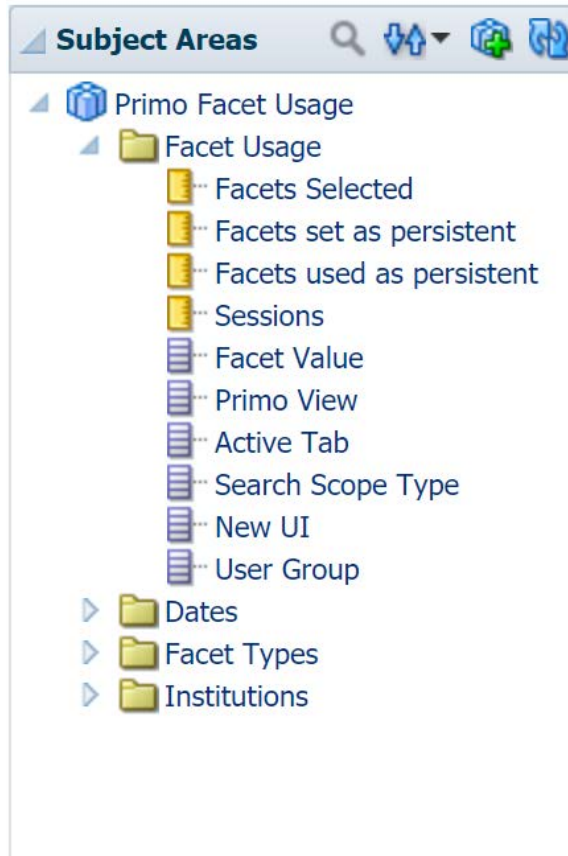




# Example 1 – Tableau dashboard using Alma benchmark data

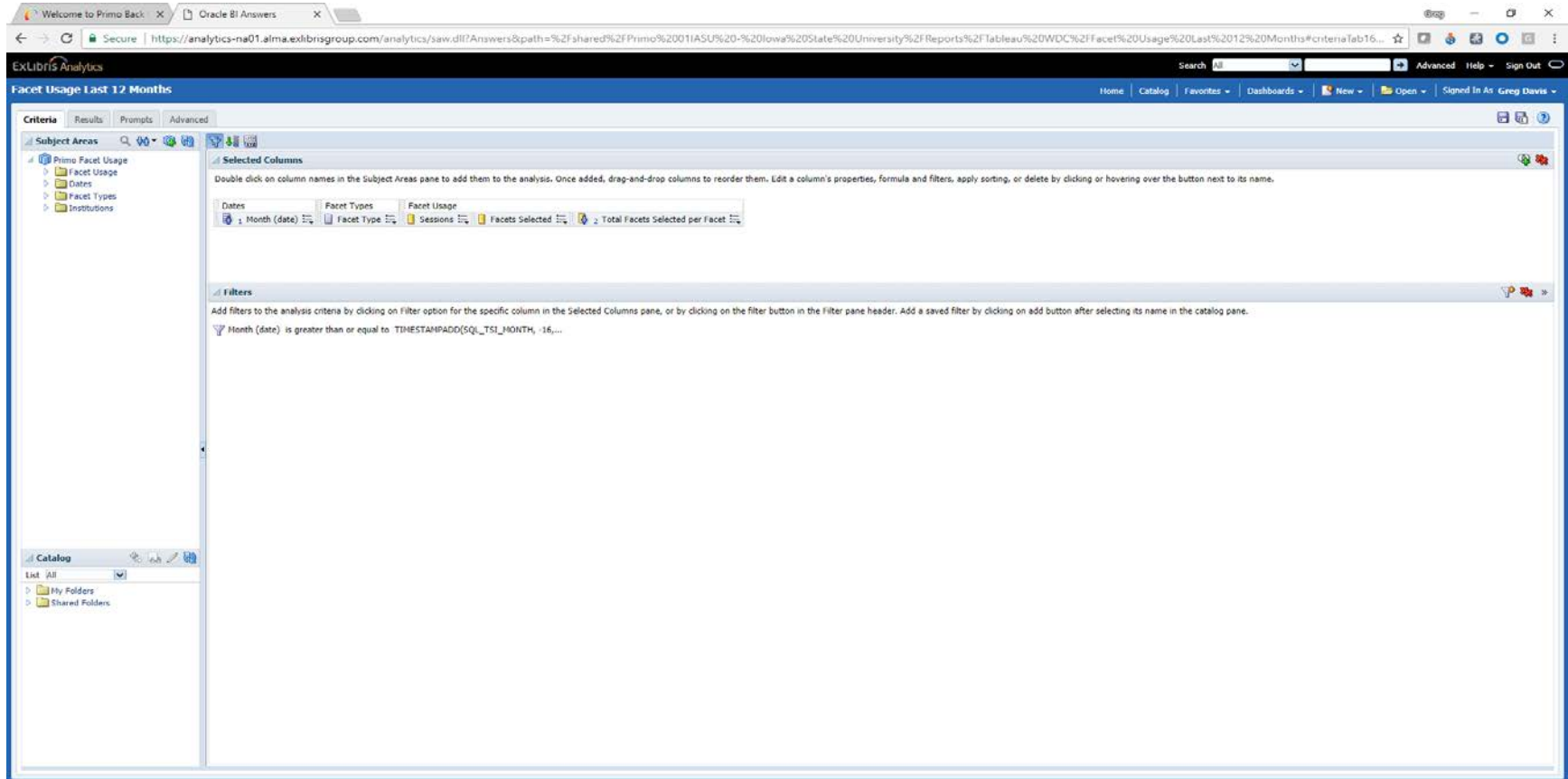


# Example 2 – Tableau dashboard using Primo trend data

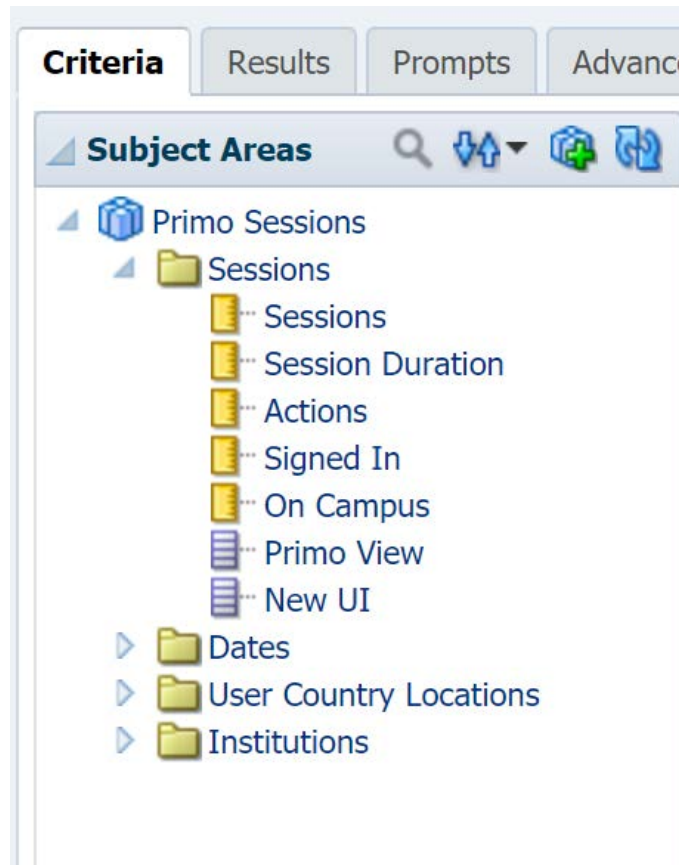


`TIMESTAMPADD(SQL_TSI_MONTH, -16, CURRENT_DATE)`

# Example 2 – Tableau dashboard using Primo trend data



# Example 2 – Tableau dashboard using Primo trend data



# Example 2 – Tableau dashboard using Primo trend data

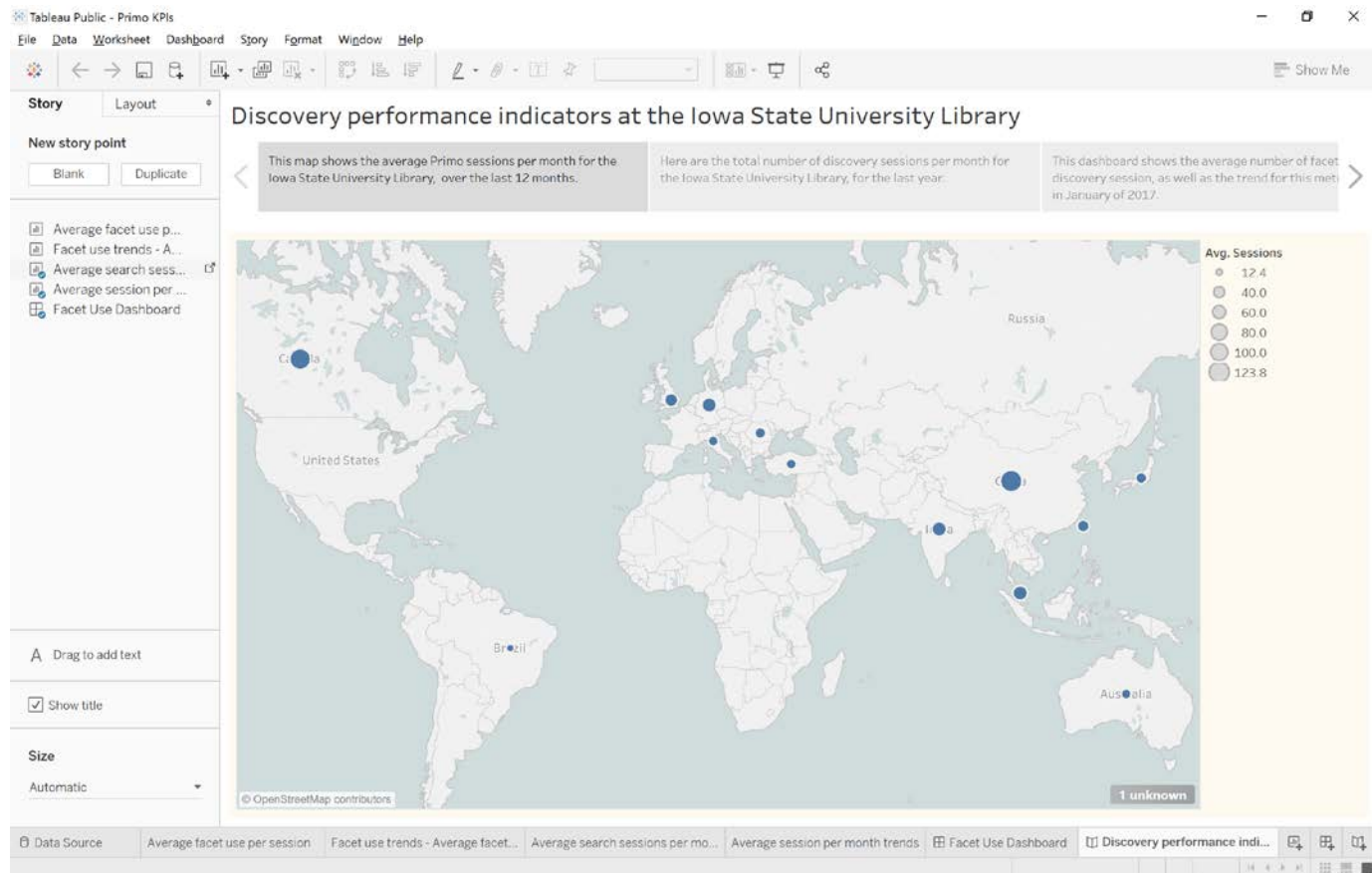
The screenshot displays the ExLibris Analytics Tableau interface. The browser address bar shows the URL: <https://analytics-na01.alma.exlibrisgroup.com/analytics/saw.dll?Answers&path=%2Fshared%2FPrimo%2011ASU%20-%20Iowa%20State%20University%20Reports%2FTableau%20WDC%2FSession%20Metrics%2012%20month%20trends#criteria...>

The dashboard title is "Session Metrics 12 month trends". The interface includes a navigation bar with "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", and "Signed In As: Greg Davis".

The main content area is divided into several sections:

- Criteria:** Includes tabs for "Results", "Prompts", and "Advanced".
- Subject Areas:** A tree view on the left showing "Primo Sessions", "Sessions", "Dates", "User Country Locations", and "Institutions".
- Selected Columns:** A central pane with a header: "Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name." Below this, columns are listed under three categories: "Dates" (Month (date)), "User Country Locations" (Country), and "Sessions" (Sessions, Actions, Session Duration, Signed In, Total Sessions per Country).
- Filters:** A section with a header: "Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane." Below this, a filter is applied: "Month (date) is greater than or equal to TIMESTAMPADD(SQL\_TSI\_MONTH, -12,...".
- Catalog:** A bottom-left pane with a "List" dropdown set to "All" and a tree view showing "My Folders" and "Shared Folders".

# Example 2 – Tableau storyboard using Primo Analytics data



# More Iowa State University Library examples of Tableau use

- Iowa State University Library Assessment Website
- <http://assess.lib.iastate.edu>

Des Moines East x ISU RAGBRAI rolls into town x Extract Refreshes - Tabl x Publishers: Use Tablea x Iowa State Library Almi x exerpts - Google Search x Download Now | Table x Tableau Prep 2018.1.1 x Library Assessment | lo x

Secure | https://assess.lib.iastate.edu

iastate.edu Index v Directory Maps Safety Sign Ons v

# IOWA STATE UNIVERSITY

## Library Assessment

Search  UNIVERSITY LIBRARY

THE PLAN STORIES v METRICS v SURVEYS v REPORTS

- Operational Data Trends
- Digital Initiatives Web Analytics
- Chat Data
- Gate Counts
- KIC Scanner Metrics
- Tableau Public Profile
- Library Facts
- Alma Analytics KPIs

45,000 p

digitized

2.9 MILLION BOOKS

24/7 ACCESS to information online

2,412,7000 visitors in 2017

110 STUDENT WORKERS

ISU Library Fun Facts (Courtesy of ISU Foundation Forever True Campaign)

IOWA STATE UNIVERSITY University Library

Library Assessment

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Privacy Policy

https://assess.lib.iastate.edu/operational-data

TableauPrep-2018-....e... ^ TableauPrep-2018-....e... ^

Show all x



# Live Demo



[Breaking the Prairie, Grant Wood \(1937\)](#)

# Questions?



Contact: Greg Davis, email: [davisgr@iastate.edu](mailto:davisgr@iastate.edu)

Presentation Materials:

<https://iastate.box.com/s/ib0qvz8p69pbmfl5ztglelzbvdxasxu>