



PALS

September 20, 2019

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Analytics: Where in the world is my data? (For those not working in Analytics)



MINNESOTA STATE



Agenda

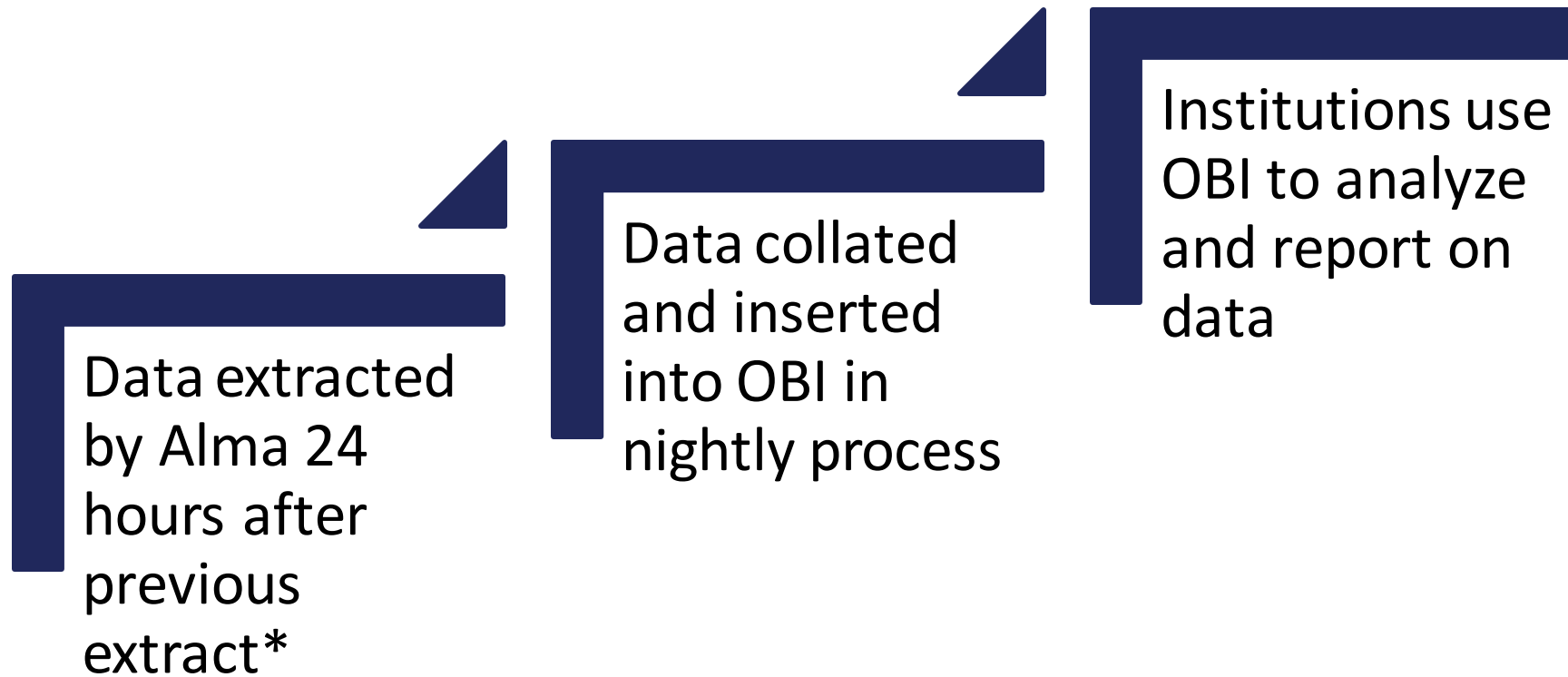
Agenda:

- Data Currency – Why Is My Data a Day Old?
- Roles
- Where Data Lives Outside of Analytics
 - Reports
 - Dashboards
 - Widgets
 - Scheduled v Non-scheduled
- Knowing Is Half the Battle
- Data Awareness



Data Currency – Why Is My Data a Day Old?

Data Frequency



* Time of the last extract can be found under the Analytics drop down in the Alma navigation bar.

“Data available as of” & “Data updated as of” Information

The screenshot shows a web application interface with a blue header bar. The header contains the text "Analytics" on the left and "TST Main Library - Main Circ Desk" on the right. Below the header is a white dropdown menu. The menu is organized into two columns. The left column contains the following items: "Analytics", "Design Analytics", "Design Analytics (Primo)", "Subscribe to Analytics", "Analytics Objects", "Analytics Objects List", "Analytics User Statistics", "Analytics Citation Attribute Types", and "Analytics Member Settings". The right column contains: "Reports", "Data Review Dashboard", and "Overdues". At the bottom of the menu, there are two grey rectangular boxes with orange borders. The left box contains the text "Data available as of: 08/07/2019 24:50:10 CDT". The right box contains the text "Data updated as of: 08/06/2019 19:00:00 CDT". Below these boxes is a search bar with the text "Click here to search for any menu link or press Alt+Ctrl+F".

mode=ajax

Analytics TST Main Library - Main Circ Desk

Analytics

Design Analytics

Design Analytics (Primo)

Subscribe to Analytics

Analytics Objects

Analytics Objects List

Analytics User Statistics

Analytics Citation Attribute Types

Analytics Member Settings

Reports

Data Review Dashboard

Overdues

Data available as of:
08/07/2019 24:50:10 CDT

Data updated as of:
08/06/2019 19:00:00 CDT

Click here to search for any menu link or press Alt+Ctrl+F



Roles

Access given by Analytics Administrator role

The screenshot shows a web application interface with a blue header bar. The header contains the text "Analytics" on the left and "TST Main Library - Main Circ Desk" on the right. Below the header, a dropdown menu is open, displaying a list of navigation options. The options are organized into two columns. The left column includes "Analytics", "Design Analytics", "Design Analytics (Primo)", "Subscribe to Analytics", "Analytics Objects", "Analytics Objects List", "Analytics User Statistics", "Analytics Citation Attribute Types", and "Analytics Member Settings". The right column includes "Reports", "Data Review Dashboard", and "Overdues". The "Subscribe to Analytics" and "Analytics Objects List" items are highlighted with a black rectangular box. At the bottom of the menu, there is a search bar with the text "Click here to search for any menu link or press Alt+Ctrl+F". Below the search bar, there are two columns of text: "Data available as of: 08/07/2019 24:50:10 CDT" and "Data updated as of: 08/06/2019 19:00:00 CDT".

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Click here to search for any menu link or press Alt+Ctrl+F

User Roles

- Staff operators with the Analytics Administrator role may expose results to those without this role



Where Data Lives Outside of Analytics

Sharing Reports: Analytics > Analytics Objects List

Analytics Configuration and Subscription

1 - 6 of 6

[+ Add New Analytics Object](#)

Type: All Schedule: All Status: All Analytics Source System: All

Title	Description	Type	Schedule	Status	Subscribe
1 Data Review Dashboard	-	Dashboard	-		<input type="button" value="..."/>
2 Expenditures per material type YTD	Expenditures per material type YTD	Widget	-		<input type="button" value="..."/>
3 LEGAL DEPOSIT	Legal Deposit Annual Receipt	Report	-		<input type="button" value="..."/>
4 Number of loans per month last 12 months	Number of loans per month last 12 months	Widget	-		<input type="button" value="..."/>
5 Overdues	-	Report	-		<input type="button" value="..."/>
6 Top 5 vendors spending YTD	Top 5 vendors spending YTD	Widget	-		<input type="button" value="..."/>

Sharing/Scheduling Analytics Reports

- Alternate navigation path to Analytics Objects List: Alma > Administration > Analytics > Configuration Menu > Analytics Objects List
- Key things you can do from the list:
 1. Add New Analytics Object
 2. [more actions] > Manage Subscription for scheduled reports
 - Add either a user name or email address, but not both
 3. Use the Subscribe toggle to manage your personal subscriptions
 4. [more actions] > Edit/Duplicate/Delete

Creating a New Report Object

Alma Analytics Object Cancel Save

Acq_report ▼

Type REPORT

General Information ▼

Title * Acq_report

Analytic Folder * Test Library 01MNPALS_TST/Reports ▼ Name * POL_by_Invoice_Status ▼

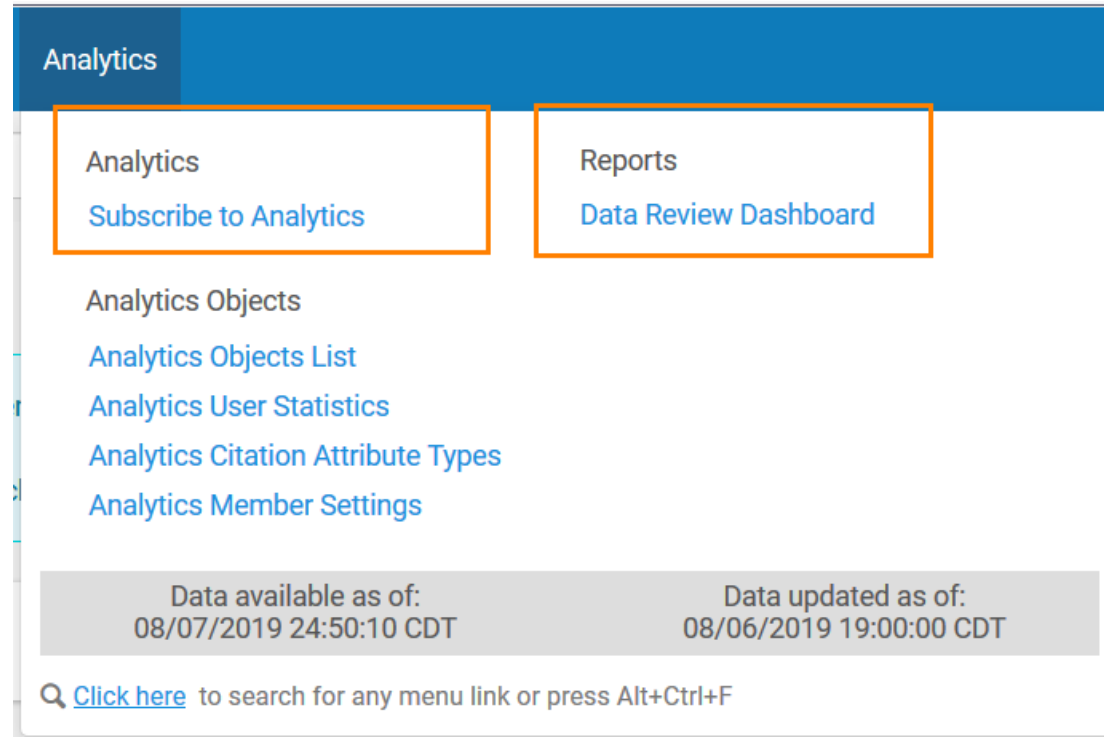
Type * Report ▼

Description

Roles ▼ + Add Role 📄 ⚙️

▲ Role	▲ Description	
1 Invoice Manager	Manages invoice creation, review and approval actions	⋮
2 Purchasing Manager	Manages authoritative purchasing operations such as purchase orders review and sending, purchasing license related issues etc.	⋮

What a Shared Report Looks Like for Staff Who Do Not Have Analytics Roles



The screenshot shows a navigation menu for the 'Analytics' section. The menu is titled 'Analytics' and is displayed in a blue header. Below the header, there are two main categories: 'Analytics' and 'Reports'. The 'Analytics' category includes links for 'Subscribe to Analytics', 'Analytics Objects', 'Analytics Objects List', 'Analytics User Statistics', 'Analytics Citation Attribute Types', and 'Analytics Member Settings'. The 'Reports' category includes a link for 'Data Review Dashboard'. At the bottom of the menu, there is a search bar with a magnifying glass icon and the text 'Click here to search for any menu link or press Alt+Ctrl+F'. Below the search bar, there are two columns of text: 'Data available as of: 08/07/2019 24:50:10 CDT' and 'Data updated as of: 08/06/2019 19:00:00 CDT'.

Analytics

Analytics
Subscribe to Analytics

Reports
Data Review Dashboard

Analytics Objects
Analytics Objects List
Analytics User Statistics
Analytics Citation Attribute Types
Analytics Member Settings

Data available as of:
08/07/2019 24:50:10 CDT

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08/06/2019 19:00:00 CDT

🔍 [Click here](#) to search for any menu link or press Alt+Ctrl+F

Reading a Report

Count of Physical Items by Location Report

Library Name	Location Name	Num of Items (In Repository)
TST Bell Library	Bell Branch Main	13
	UNASSIGNED location	2
TST Bell Library Total		15
TST Branch 1	Branch 1 Main	22
	Branch 1 Reference	4
	Branch 1 Test	1
TST Branch 1 Total		27
TST Branch 2	Branch 2 Main	17
TST Branch 2 Total		17
TST Centennial Library	Centennial Branch	27
TST Centennial Library Total		27
TST Main Library	Borrowing Resource Sharing Requests	127
	Cats Display	1
	Demonstration	1,127
	Display Dog	1
	ILL	9

Live Demo

Sharing Widgets: Analytics > Analytics Objects List

Analytics Configuration and Subscription

1 - 6 of 6 + Add New Analytics Object

Type: All Schedule: All Status: All Analytics Source System: All

Title	Description	Type	Schedule	Status	Subscribe
1 Data Review Dashboard	-	Dashboard	-		<input type="button" value="..."/>
2 Expenditures per material type YTD	Expenditures per material type YTD	Widget	-		<input type="button" value="..."/>
3 LEGAL DEPOSIT	Legal Deposit Annual Receipt	Report	-		<input type="button" value="..."/>
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5 Overdues	-	Report	-		<input type="button" value="..."/>
6 Top 5 vendors spending YTD	Top 5 vendors spending YTD	Widget	-		<input type="button" value="..."/>

Sharing Widget Reports

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 2. [more actions] > Edit/Duplicate/Delete

Creating a New Widget Object

Alma Analytics Object Cancel Save

Acq_widget ▼

Type WIDGET

General Information ▼

Title * Acq_widget

Analytic Folder * Alma/Acquisitions/Dashboards ▼ Name * Acquisitions Dashboard ▼

Type * Widget ▼

Description

Roles ▼

+ Add Role 🔗 ⚙️

▲ Role	▲ Description	
1 Fund Manager	Manages all fund related actions	⋮

What a Shared Widget Report Looks Like for Staff Who Do Not Have Analytics Roles

Please be advised that Ex Libris will deploy a release update on your Alma production environment from 08/11/2019 02:00:00 CDT to 08/11/2019 03:00:00 CDT. On the release update deploy date you will be able to view the release notes by clicking here for information about the issues resolved in this SP. During this period access to Alma may be unavailable, so please take this into account in your schedule. We apologize for any inconvenience this may cause.

Recent Pages > Find and Manage Users Admin > Analytics Objects List Analytics > Subscribe to Analytics Analytics > Lending Requests Fulfillment > Analytics Member Sett... Analytics

Number of loans per month last 12 months

Open in a new window

Month	Number of Loans (2019)
2	32
3	7
4	10
5	20
6	6
7	5
8	2

Notifications

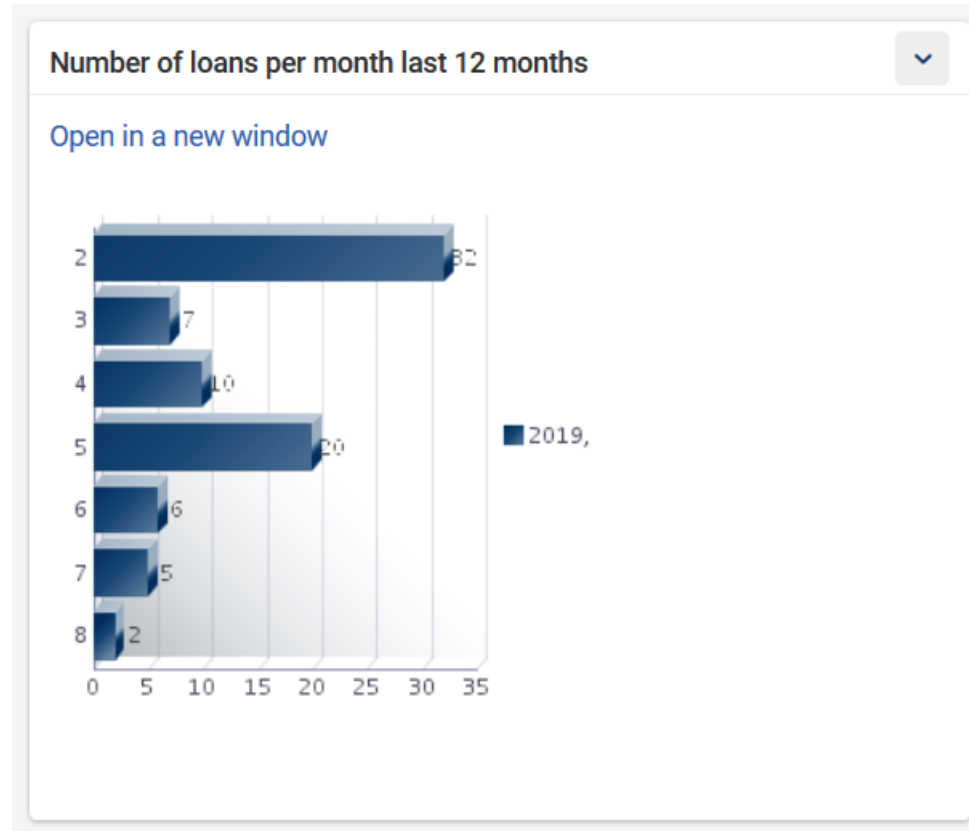
- 4/3/2018** 04/30/2018
Not seeing menu options? You may need to add a role. See the full list with descriptions here.
- 4/3/2018** 04/30/2018
Advanced Search Indexes (Which MARC fields are searched under which criteria?)
- 4/3/2018** 04/30/2018
Want to use hotkeys instead of clicking? Hotkeys cheat sheet is here

Tasks

- 1 Purchase Requests
- 23 Borrowing Requests
- 4 Lending Requests
- 2 Other Requests
- 4 DARA Recommendations
- 396 Order Lines
- 12 Invoices
- 8 Electronic Resources

Organization Calendar

Reading a Widget



Live Demo

Sharing Dashboard: Analytics > Analytics Objects List

Analytics Configuration and Subscription

1 - 6 of 6 [+ Add New Analytics Object](#)

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1 Data Review Dashboard	-	Dashboard	-		<input type="button" value="..."/>
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 4. [more actions] > Edit/Duplicate/Delete

Creating a New Dashboard Object

< Alma Analytics Object Cancel Save

cc_acq_dashboard ▼

Type SCH_DASHBOARD

General Information ▼

Title * cc_acq_dashboard

Analytic Folder * Alma/Acquisitions/Dashboards ▼ Name * Acquisitions Dashboard ▼

Type * Scheduled Dashboard ▼

Description

Status * Active Inactive

Schedule * Every Monday at 02:00 ▼ Email Notifications

Roles ▼

+ Add Role 📄 ⚙️

▲ Role	▲ Description	
1 Acquisitions Administrator	Manages Acquisitions configurations such as Acquisitions processes	⋮

What a Shared Dashboard Looks Like for Staff Who Do Not Have Analytics Roles

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Analytics

Analytics
Subscribe to Analytics

Reports
Data Review Dashboard

Analytics Objects

- Analytics Objects List
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🔍 [Click here](#) to search for any menu link or press Alt+Ctrl+F

Reading a Dashboard

Data Review Dashboard

Count of Physical Items by Location | Count of Users by Group | Count of POLs by Status | Count of POLs by Type | Count of POLs by Acq Method

Count of Physical Items by Location Report

Library Name	Location Name	Num of Items (In Repository)
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	Display Dog	1
	ILL	9

Live Demo



Knowing Is Half the Battle

Knowing Is Half the Battle

- What: What issues or questions do you require information about?

Knowing Is Half the Battle

- Why: What are your objectives and expectations?

Knowing Is Half the Battle

- Who: Who requires this information?
- Analytics Objects can be shared by an Analytics Administrator to specific individuals or groups (as defined by staff roles), and do not need to be shared with all staff users

Knowing Is Half the Battle

- When: When is this information required?
- How often do you need to look at analytics?
 - Most reports are updated daily
 - How often do you need to check statistics? Monthly? Quarterly?
 - How often are you reporting on library activities to someone else?

Knowing Is Half the Battle

- Where: Where does this data need to ultimately go? Is this information you are using to just monitor things or is this statistical information you are retaining?



Data Awareness

Data Awareness

What is the right report?

- Once your information need has been identified, what report(s) are you going to use?

Data Awareness

Verifying and Using the report

- How do the results of your analysis of Alma Analytics compare to your objectives and expectations?
- Review, always review. Alma Analytics is collecting new data all the time for you to evaluate at the necessary intervals.

Data Awareness

Who at your library is the keeper of the Analytics?

Upcoming Presentations & Other Important Dates

Fall 2019

- Survey 1 Deadline, 10/4
- Getting started, know the ABCs, 10/10
- MacGyvering the box, 11/15

Spring 2020

- Training to be announced later

Analytics Cheat Sheet

- Answer 4214: https://pals.custhelp.com/app/answers/detail/a_id/4214



PALS



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