



PALS

Analytics: The Cheat Sheet

Version 8.15.2019



MINNESOTA STATE

Alma Analytics in a Nutshell

What are Analytics?

- Built on Oracle Business Intelligence

What can you do?

- Build, customize, and run reports on your Alma instance

Alma Analytics in a Nutshell

Who can create reports?

- Anyone with the Design Analytics role

Accessing Analytics

- Alma > Analytics > Design Analytics
- Alma > Analytics > Design Analytics (Primo)

Other Analytics Tools

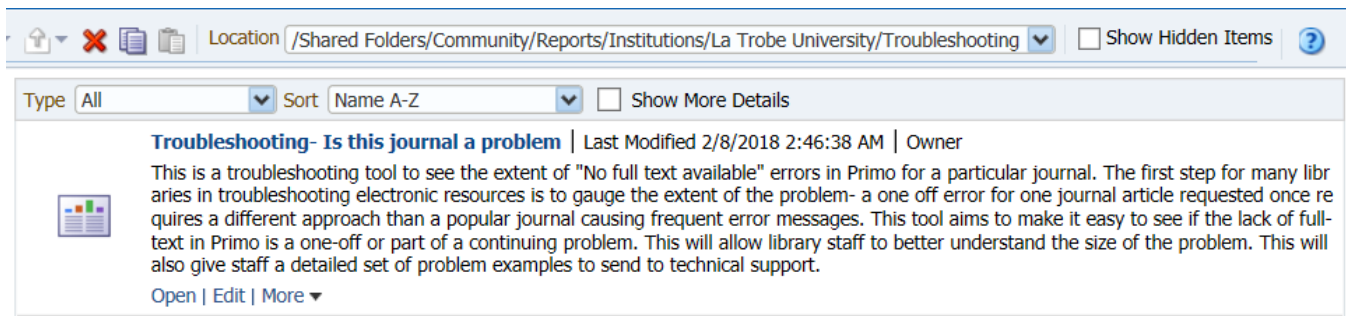
- Primo Analytics show how your users interact with discovery
- The new DARA tool in Alma can help make recommendations for maximizing configuration options.
- The native Alma Advanced Search can quickly isolate certain records.

Best Practices for Working with Community Contributions

- Analyses found here will run against your institution's data, so look at and run freely
- Please **DO NOT** modify any analyses in the Community folder
- Use the Copy and Paste functions to make a local copy or Save As to your institution's folders

Best Practices for Sharing an Analysis/Dashboard with the Community (or even within your own institution)

- Have a clear title
- Include a full description to complement the information in the title, including your initials.



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?

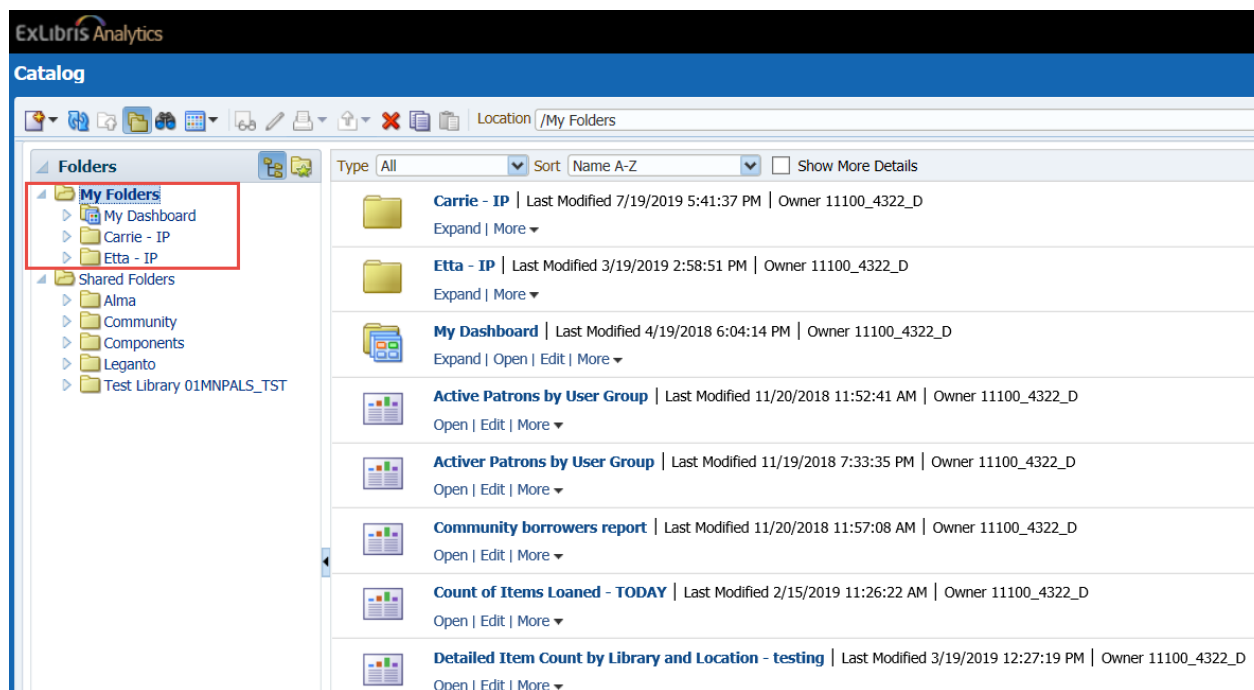
Terminology

Catalog: The directory of folders where previously created analyses are saved.

The screenshot displays the ExLibris Analytics Catalog interface. The top navigation bar includes the ExLibris Analytics logo and the word "Catalog". Below this is a toolbar with various icons for navigation and actions. The main content area is divided into two panes. The left pane, titled "Folders", shows a tree view of the directory structure under "My Folders". The right pane displays a list of items, each with a small icon, a title, and metadata such as "Last Modified" and "Owner".

Type	Sort	Show More Details
Folder	Name A-Z	<input type="checkbox"/>
Folder	Carrie - IP	Last Modified 7/19/2019 5:41:37 PM Owner 11100_4322_D Expand More
Folder	Etta - IP	Last Modified 3/19/2019 2:58:51 PM Owner 11100_4322_D Expand More
Folder	My Dashboard	Last Modified 4/19/2018 6:04:14 PM Owner 11100_4322_D Expand Open Edit More
Report	Active Patrons by User Group	Last Modified 11/20/2018 11:52:41 AM Owner 11100_4322_D Open Edit More
Report	Active Patrons by User Group	Last Modified 11/19/2018 7:33:35 PM Owner 11100_4322_D Open Edit More
Report	Community borrowers report	Last Modified 11/20/2018 11:57:08 AM Owner 11100_4322_D Open Edit More
Report	Count of Items Loaned - TODAY	Last Modified 2/15/2019 11:26:22 AM Owner 11100_4322_D Open Edit More
Report	Detailed Item Count by Library and Location - testing	Last Modified 3/19/2019 12:27:19 PM Owner 11100_4322_D Open Edit More

My Folder: The folder where you can store your analyses. It is your personal folder, and is not shared.



The screenshot displays the ExLibris Analytics Catalog interface. The left sidebar shows a tree view of folders, with 'My Folders' highlighted in red. The main content area shows a list of folders and reports, including 'Carrie - IP', 'Etta - IP', 'My Dashboard', and several reports like 'Active Patrons by User Group' and 'Community borrowers report'.

ExLibris Analytics Catalog

Location: /My Folders

Type: All | Sort: Name A-Z | Show More Details

My Folders

- My Dashboard
- Carrie - IP
- Etta - IP

Shared Folders

- Alma
- Community
- Components
- Leganto
- Test Library 01MNPALS_TST

Carrie - IP | Last Modified 7/19/2019 5:41:37 PM | Owner 11100_4322_D
Expand | More

Etta - IP | Last Modified 3/19/2019 2:58:51 PM | Owner 11100_4322_D
Expand | More

My Dashboard | Last Modified 4/19/2018 6:04:14 PM | Owner 11100_4322_D
Expand | Open | Edit | More

Active Patrons by User Group | Last Modified 11/20/2018 11:52:41 AM | Owner 11100_4322_D
Open | Edit | More

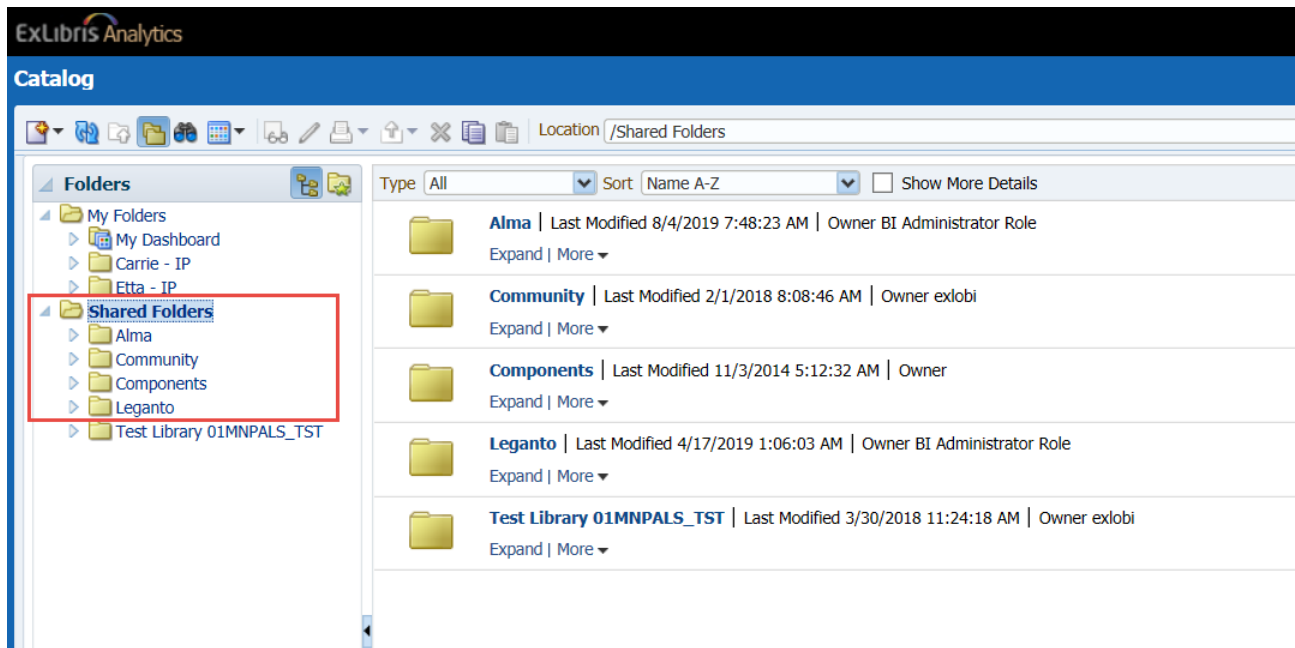
Active Patrons by User Group | Last Modified 11/19/2018 7:33:35 PM | Owner 11100_4322_D
Open | Edit | More

Community borrowers report | Last Modified 11/20/2018 11:57:08 AM | Owner 11100_4322_D
Open | Edit | More

Count of Items Loaned - TODAY | Last Modified 2/15/2019 11:26:22 AM | Owner 11100_4322_D
Open | Edit | More

Detailed Item Count by Library and Location - testing | Last Modified 3/19/2019 12:27:19 PM | Owner 11100_4322_D
Open | Edit | More

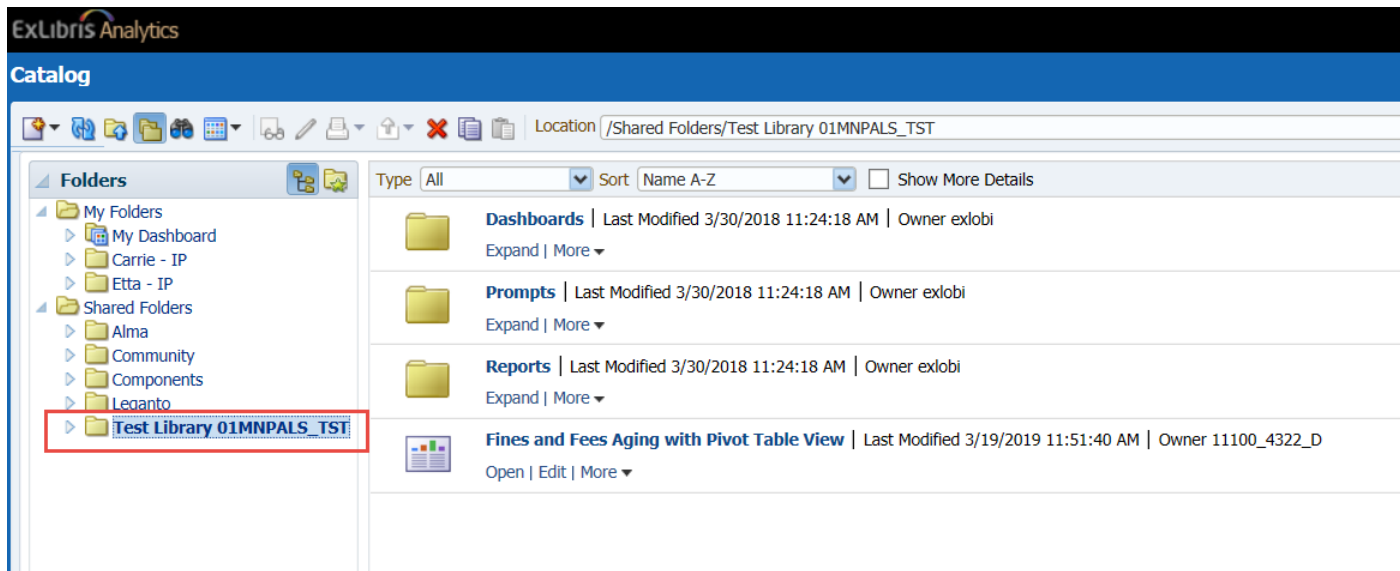
Shared Folders: The folders where you can find analyses that have been shared with you.



Shared Folders

- Analyses Shared by the Alma Community and Ex Libris
 - The Alma sub-folder is for reports created by Ex Libris staff
 - The Community folder contains reports from:
 - Individual institutions
 - Consortia
 - Regional User Groups
 - Ex Libris-User Group Work Groups
- There are many reports available

Institution Folder: The folder where you can see your institutionally shared analyses. It is one of the Shared Folders, but is only shared by other users at your institution.



The screenshot displays the ExLibris Analytics Catalog interface. The top navigation bar is blue with the 'ExLibris Analytics' logo and the word 'Catalog'. Below the navigation bar is a toolbar with various icons and a 'Location' field containing '/Shared Folders/Test Library 01MNPALS_TST'. The main content area is divided into two columns. The left column, titled 'Folders', shows a tree view of the folder structure. The right column shows a list of items with their names, last modified dates, and owners.

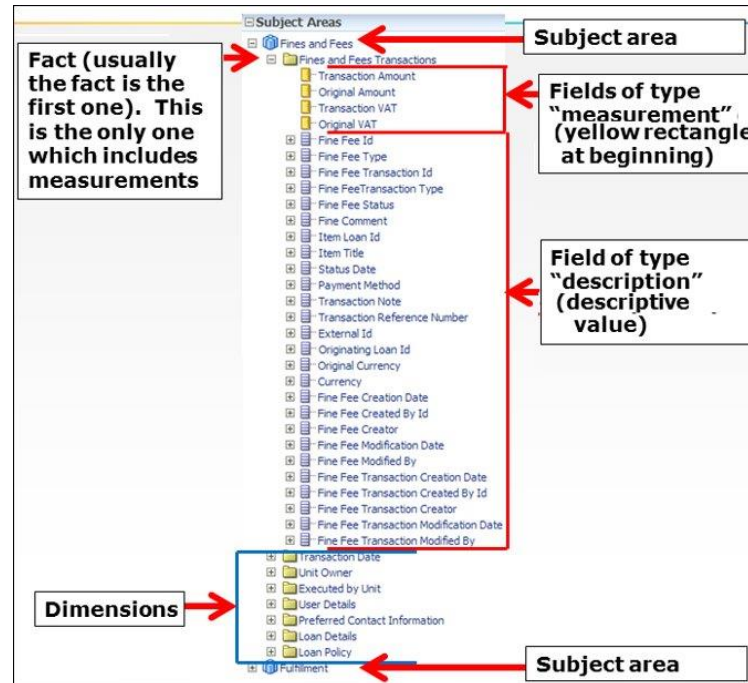
Folder Structure:

- My Folders
 - My Dashboard
 - Carrie - IP
 - Etta - IP
- Shared Folders
 - Alma
 - Community
 - Components
 - Leganto
 - Test Library 01MNPALS_TST**

Item List:

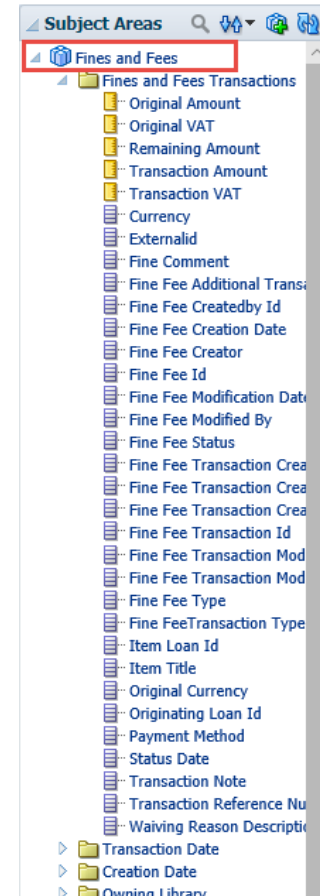
Type	Name	Last Modified	Owner
Folder	Dashboards	3/30/2018 11:24:18 AM	exlobi
Folder	Prompts	3/30/2018 11:24:18 AM	exlobi
Folder	Reports	3/30/2018 11:24:18 AM	exlobi
Report	Fines and Fees Aging with Pivot Table View	3/19/2019 11:51:40 AM	11100_4322_D

Analytics Data Breakdown



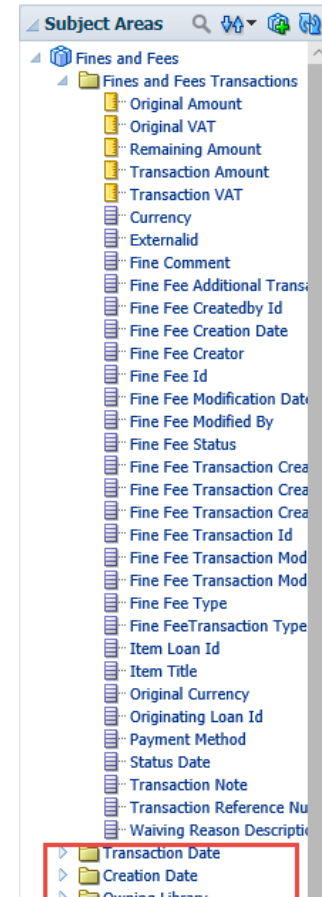
Subject Area

- Data in Analytics is organized into subject areas such as Funds Expenditure, Fulfillment, Users, Fines and Fees, and Physical Items. Subject areas contain folders, dimensions, and measurement, attribute, and hierarchical columns.



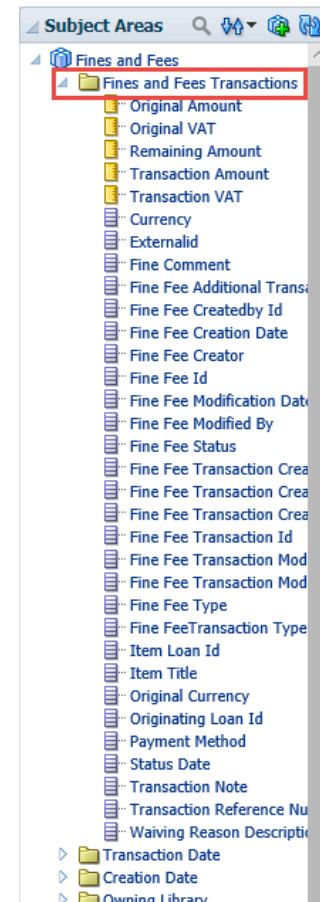
Dimensions

- Tables with descriptive attributes that are typically textual fields such as Library Code, Vendor Name, or Loan Date.



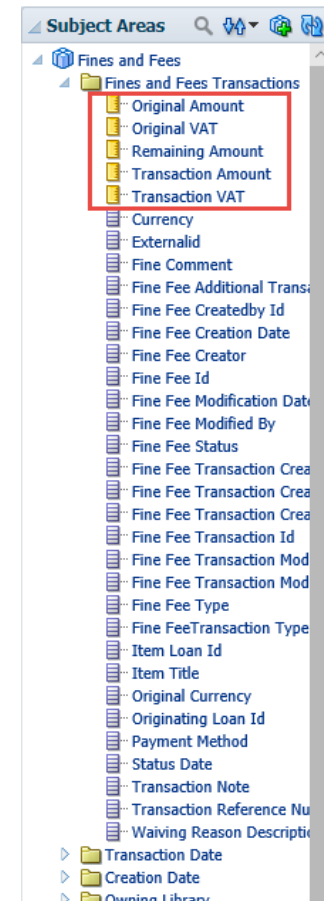
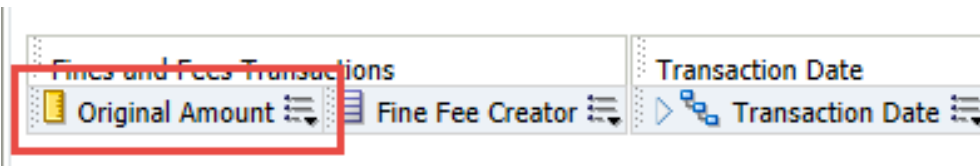
Fact

- The first dimension for a Subject Area.
- This is where you would find fields of type “measurement” and “description”



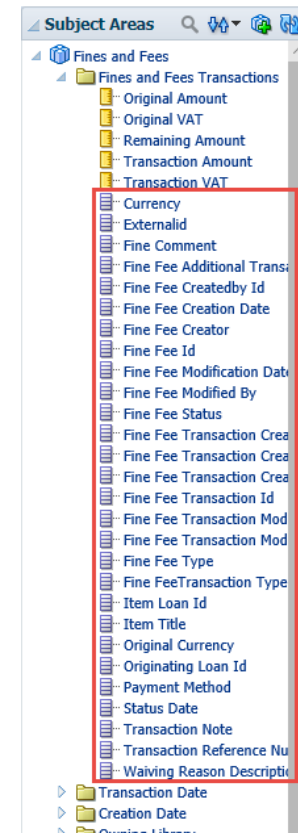
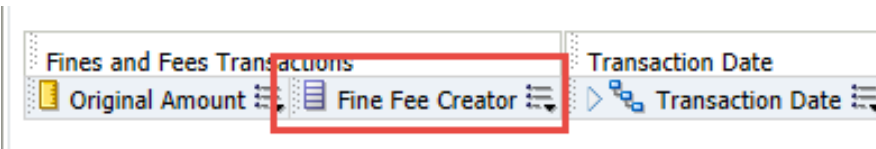
Measurement

- A column of data that holds a simple list of data values that can change or can be counted in some way.



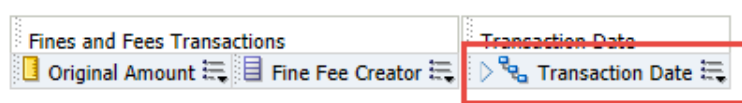
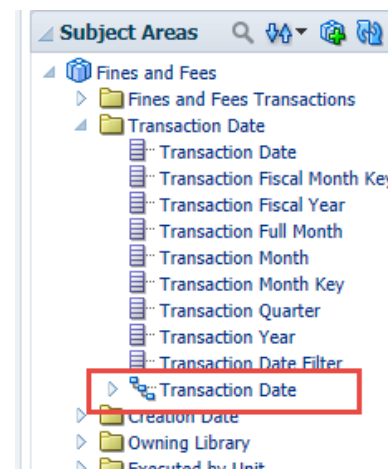
Description/Attribute

- A column that holds a flat list of values that are also known as members without a hierarchical relationship.



Hierarchical

- A column that holds data values that are organized using both named levels and parent-child relationships. This column is displayed using a tree-like structure.



Analysis

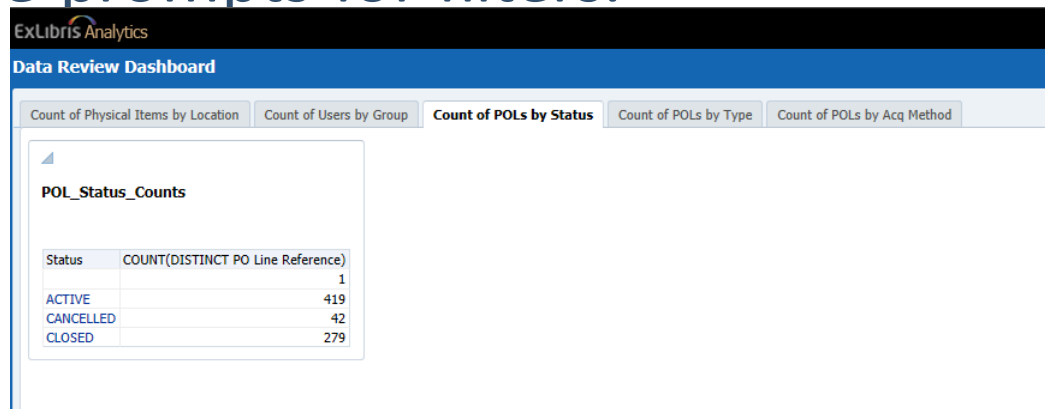
This is the basic unit of operations in Analytics. It's the tool to produce reports and graphs from one or more Subject Areas.

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	128
	Cats Display	1
	Demonstration	1 177

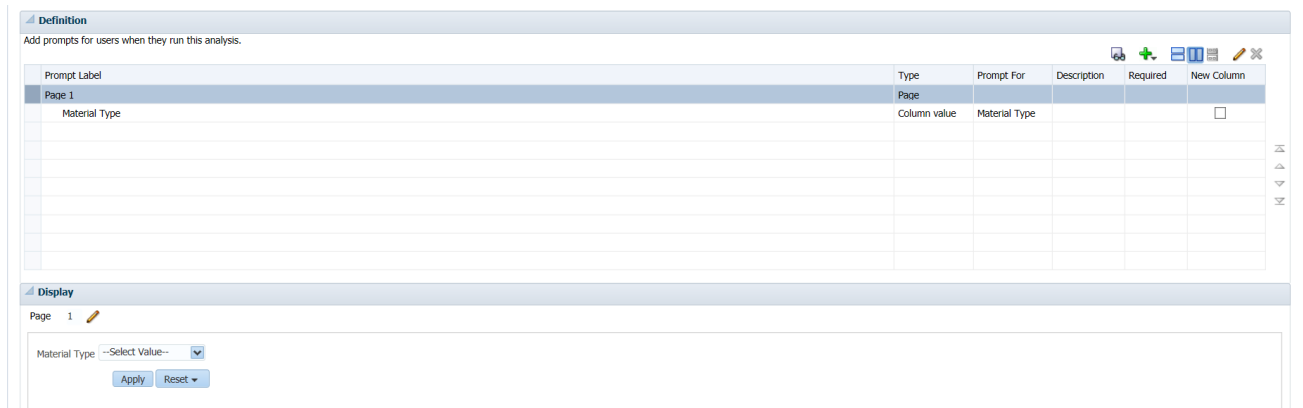
Dashboard

A display that can contain one or more pages with reports, graphs, and external content. It is dynamic and can include prompts for filters.



Filters & Dashboard Prompts

Filters can be saved as standalone objects to reuse in multiple analysis. This is helpful when working with complex filters with multiple criteria. Similarly, dashboard prompts - like a list of fiscal years - are created separately from analysis and then used as needed.



The screenshot displays the PALS software interface for defining and displaying a filter. The interface is divided into two main sections: 'Definition' and 'Display'.

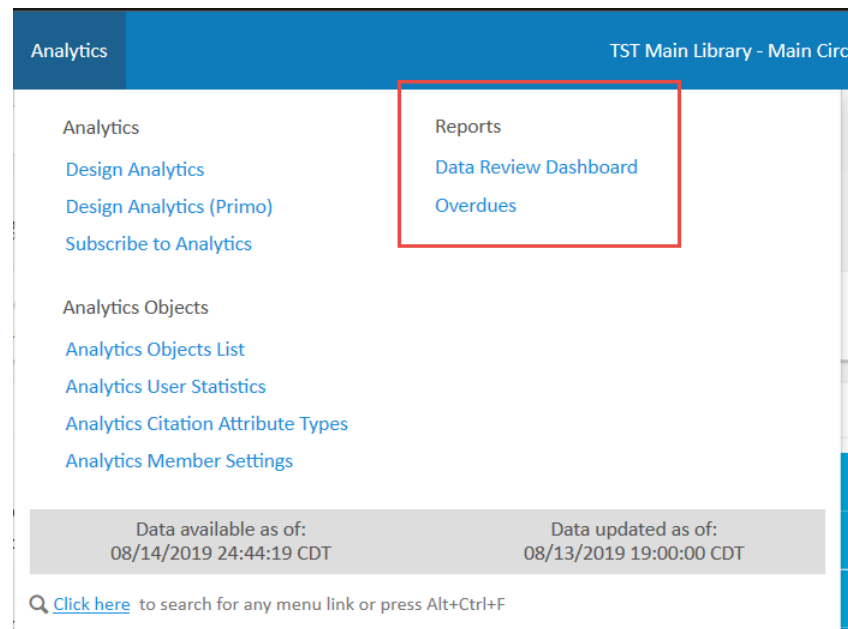
Definition Section: This section is titled 'Definition' and includes the instruction 'Add prompts for users when they run this analysis.' It features a table with the following columns: Prompt Label, Type, Prompt For, Description, Required, and New Column. The table contains one row with the following data:

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1 Material Type	Page Column value	Material Type			<input type="checkbox"/>

Display Section: This section is titled 'Display' and shows the filter's appearance in a user interface. It includes a dropdown menu for 'Material Type' with the text '--Select Value--' and two buttons: 'Apply' and 'Reset'.

Analytics Objects

Alma can directly link to analysis and dashboards after they have been loaded into the system as an “Analytics Object”.



The screenshot shows the Alma Analytics interface. The top navigation bar is blue with the text "Analytics" on the left and "TST Main Library - Main Circ" on the right. Below the navigation bar is a white menu area. The menu is organized into sections: "Analytics" (with links for Design Analytics, Design Analytics (Primo), and Subscribe to Analytics), "Analytics Objects" (with links for Analytics Objects List, Analytics User Statistics, Analytics Citation Attribute Types, and Analytics Member Settings), and "Reports" (with links for Data Review Dashboard and Overdues). A red rectangular box highlights the "Reports" section. At the bottom of the menu, there is a grey bar with two columns of text: "Data available as of: 08/14/2019 24:44:19 CDT" and "Data updated as of: 08/13/2019 19:00:00 CDT". Below the grey bar 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".

Subject Areas

Analytics Subject Areas

- [Analytics Usage Tracking](#) – Information about usage of Analytics.
- [Benchmark](#) – Compares the performance of your institution to similar institutions
- [Borrowing Requests](#) – Details on the borrowing side of ILL requests
- [Cost Usage](#) – Combined cost data derived from PO line and usage taken from COUNTER
- [Course Reserves](#) – Course Reserves information: courses, reading lists, and reading list citations
- [Digital Inventory](#)
- [Digital Usage](#)
- [E-Inventory](#) – Detailed electronic inventory related information including packages, portfolios, and services

Analytics Subject Areas

- [Events](#) – Almost any activity in an Ex Libris's server creates an event. For example, each time an MMS is created, updated, or deleted an event is generated.
- [Fines and Fees](#) – Patron related fines and fees information
- [Fulfillment](#) – Detailed loan history information
- [Funds Expenditure](#) – Fund transactions details (allocation, expenditure and encumbrance) combined with PO and invoice data
- [Leganto Institution Student Usage](#) – Institution-wide student usage in Leganto
- [Leganto Instructor Usage Events](#) – Instructor-specific usage in Leganto
- [Leganto Student Usage](#) – Student-specific usage in Leganto

Analytics Subject Areas

- [Lending Requests](#) – Details on the lending side of ILL requests
- [Licenses](#) – Licenses for electronic resources
- [Link Resolver Usage](#) – Usage details for the OpenURL link resolver
- [Physical Items](#) (formerly Inventory) – Print inventory related information (for example, titles, holdings, locations)
- [Physical Items Historical Events](#) – Historical events of physical items
- [Requests](#) – For example: Request Date, Pickup Location, and Material Type Description
- [Titles](#) – Physical, electronic, or digital titles
- [Usage Data](#) – COUNTER related data: currently supporting DB and Journal reports
- [Users](#) – For example: details, contact information, and roles

Other Resources

Alma Analytics Documentation

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_On_line_Help_\(English\)/080Analytics](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_On_line_Help_(English)/080Analytics)
- https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Alma_Analytics
- https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Analytics
- https://knowledge.exlibrisgroup.com/Cross_Product/Conferences_and_Seminars/Technical_Seminar/0402018_Technical_Seminar
- https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_APIs
- Primo Analytics
- https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Analytics/050Common_Primo_Analytics_Procedures
- https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Analytics/040Subject_Areas

Alma Analytics Recordings

- Sharai Perkes “Introduction to Alma Analytics” webinar
 - Streaming recording link:
<https://proquestmeetings.webex.com/proquestmeetings/dr.php?RCID=d380c2e673aca66aaef7349b676b4639>
 - Download recording link:
<https://proquestmeetings.webex.com/proquestmeetings/sr.php?RCID=9cb4097afbcaac9a18f5deb2f6124488>

Additional Information

- [Alma Analytics and Evidence Based Decision Making](#)
- [Analytics Benchmark subject area](#)
- [A guide for using statistics for evidence based policy, 2010](#)



PALS



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