Analytics: The Cheat Sheet

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

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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)

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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.

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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

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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.
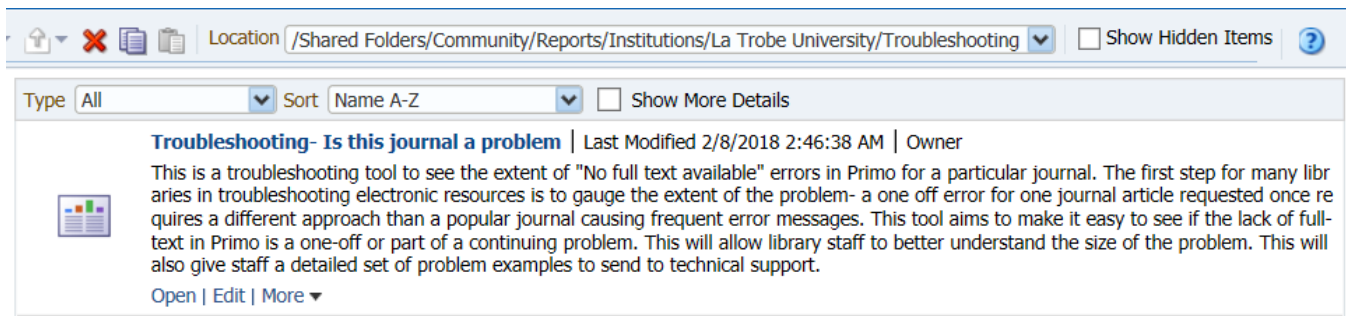
Knowing Is Half the Battle

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

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Knowing Is Half the Battle

- Why: What are your objectives and expectations?

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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

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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?

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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?

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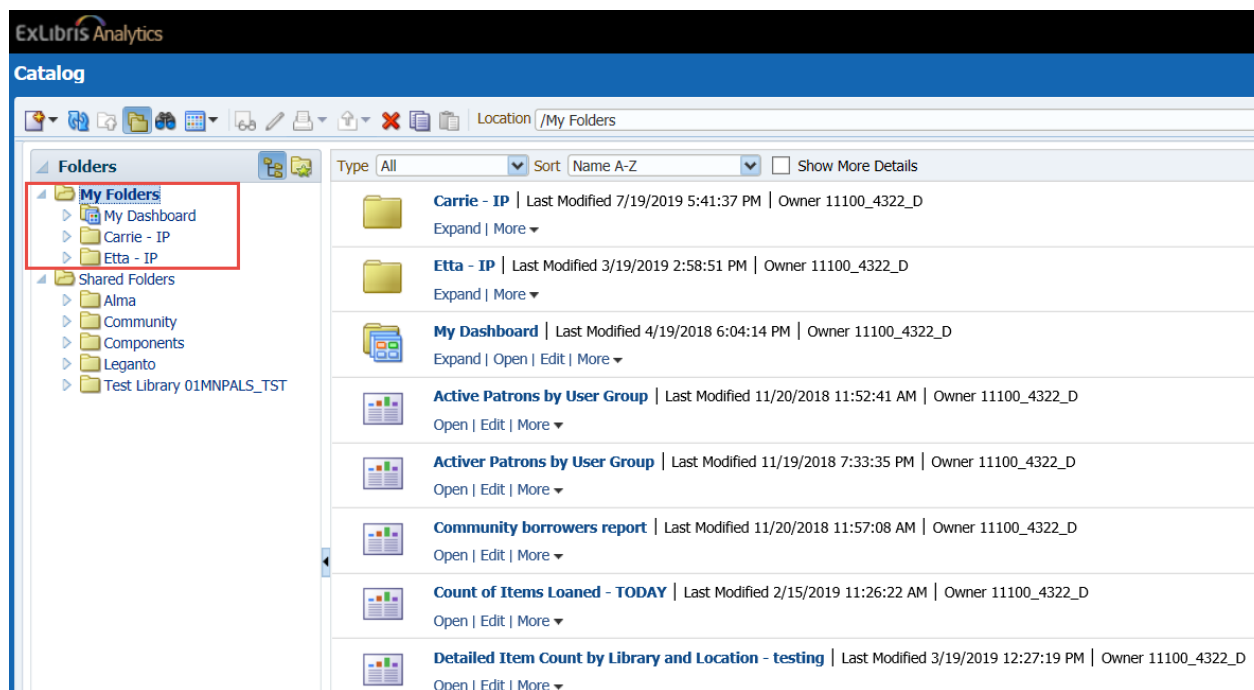
Terminology

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

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

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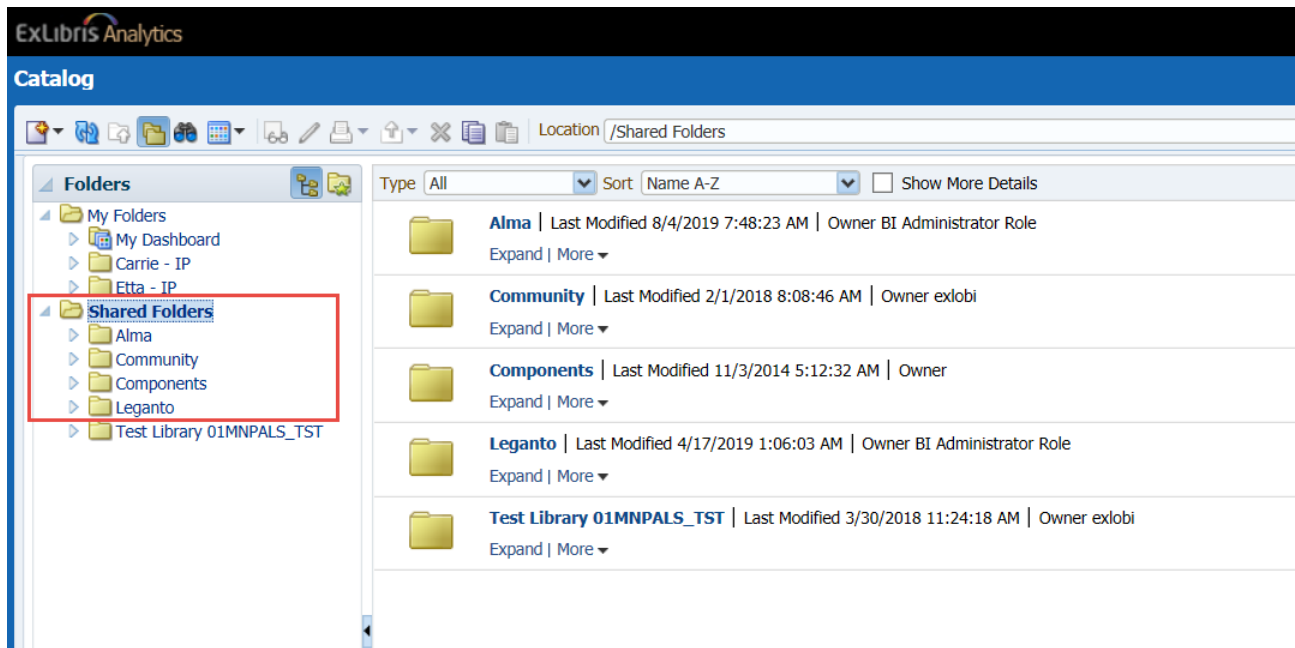
Shared Folders

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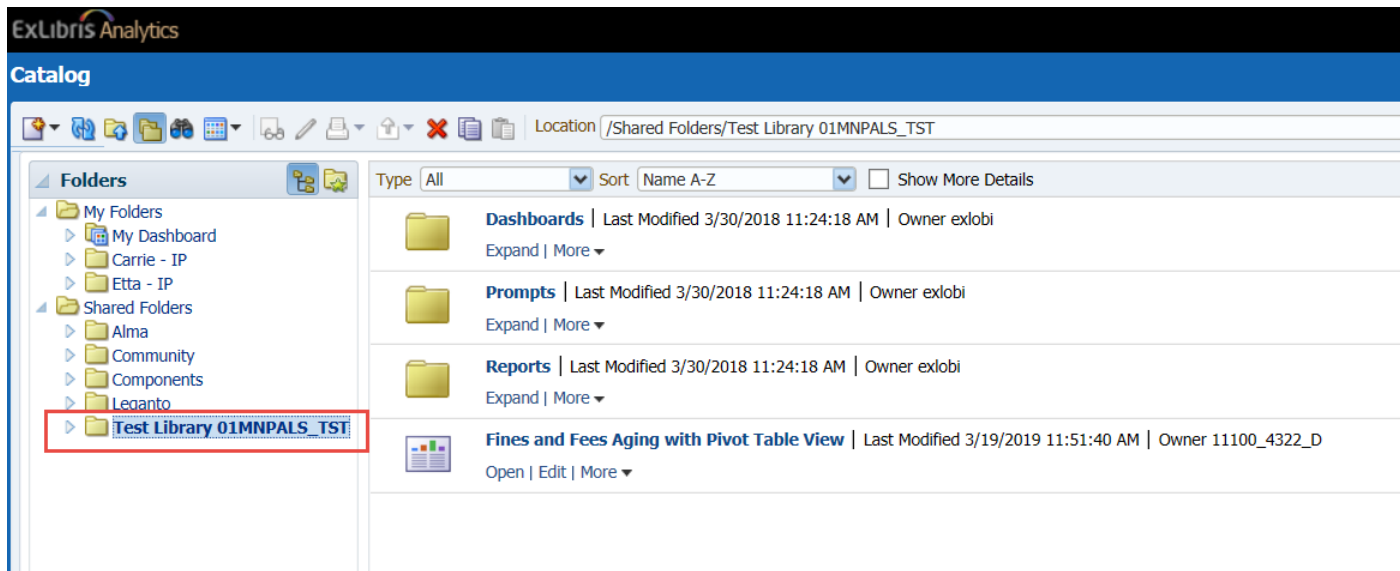 - The Community folder contains reports from:
    - Individual institutions
    - Consortia
    - Regional User Groups
    - Ex Libris-User Group Work Groups
- There are many reports available

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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.

Analytics Data Breakdown
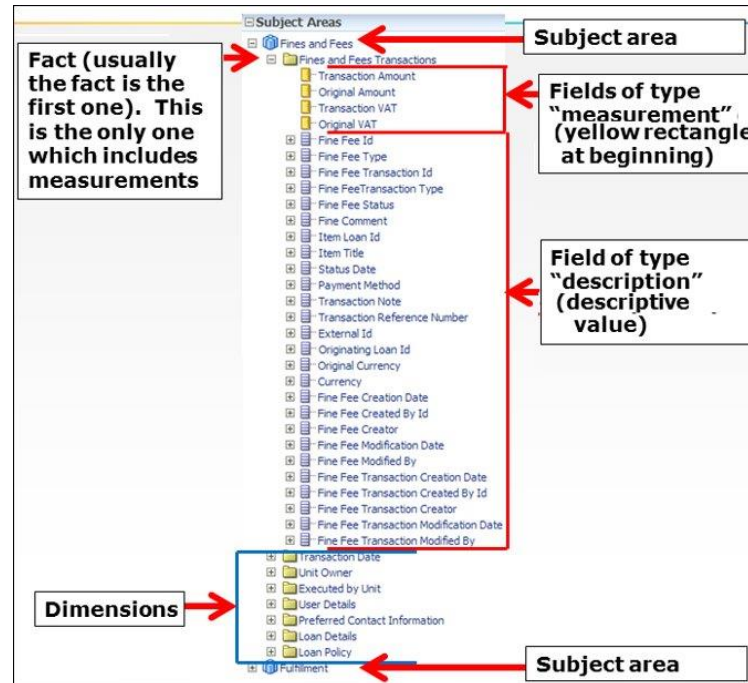
Subject Area

- 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.

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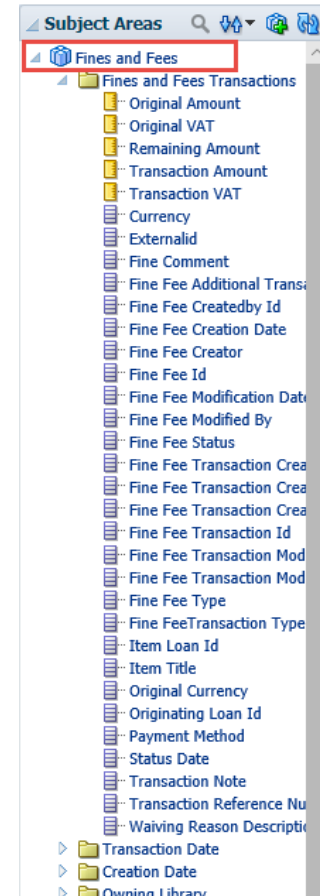
Dimensions

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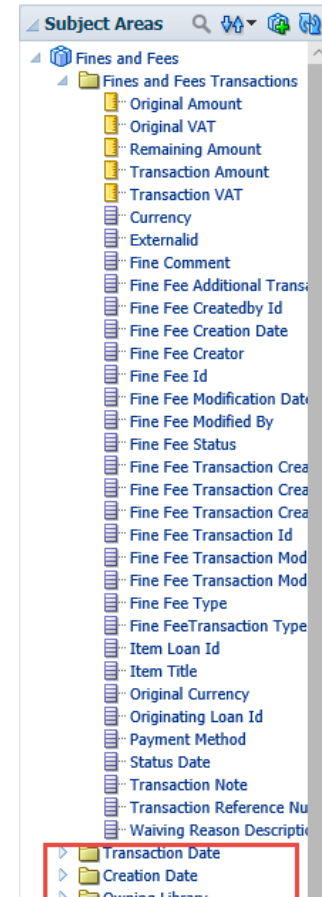
Fact

- The first dimension for a Subject Area.

- This is where you would find fields of type "measurement" and "description"
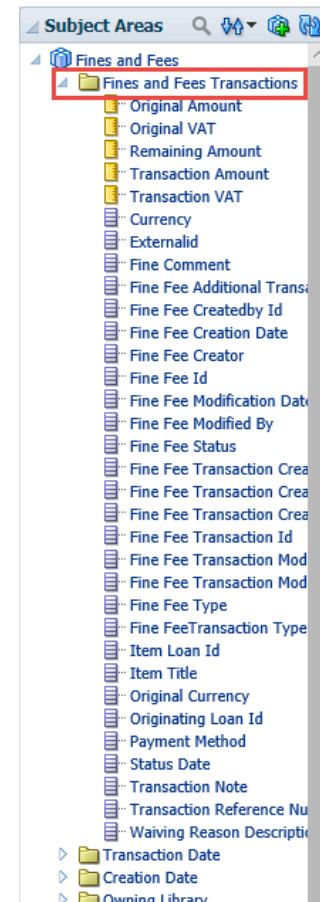
Measurement

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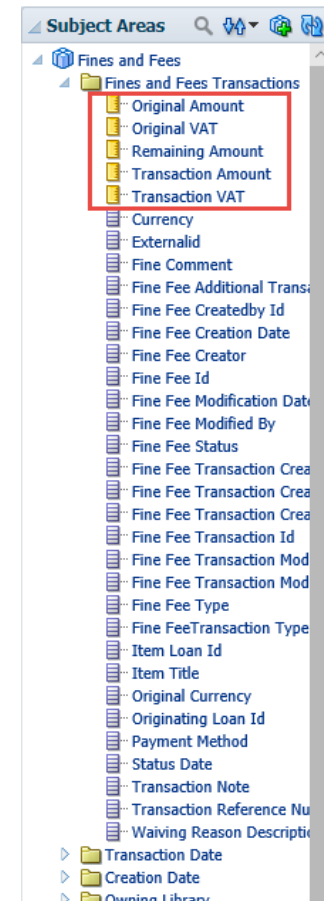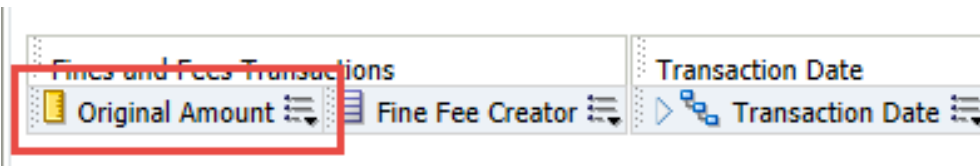
Description/Attribute

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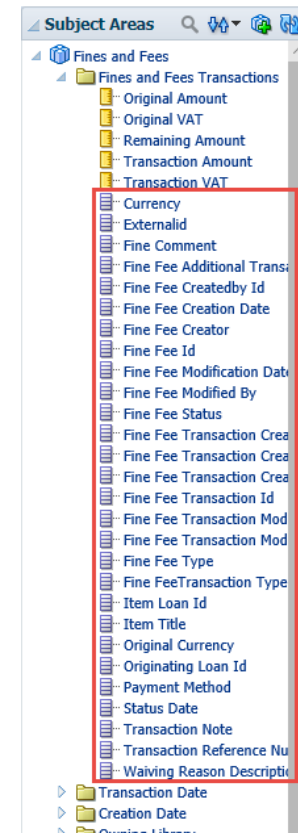
Hierarchical

- 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.
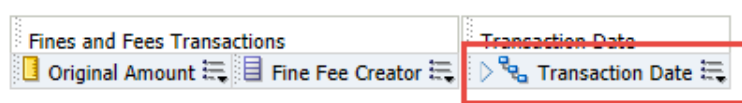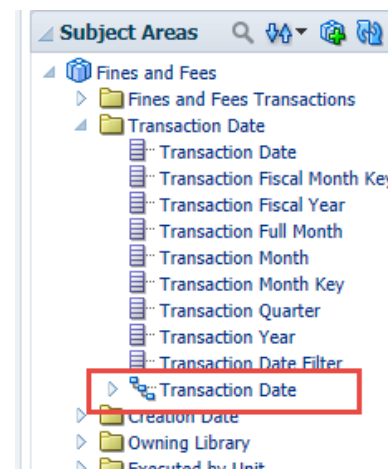
Analysis

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

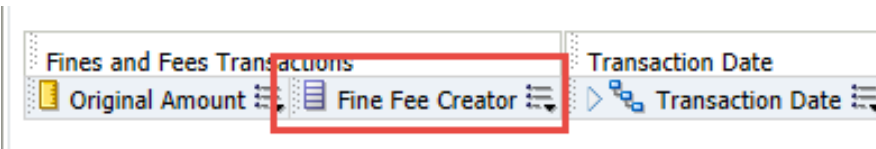| Library Name	Location Name	Num of Items (In Repository)
TST Bell Library	Bell Branch Main	13
	UNASSIGNED location	2
TST Bell Library Total		**15**
TST Branch 1	Branch 1 Main	22
	Branch 1 Reference	4
	Branch 1 Test	1
TST Branch 1 Total		**27**
TST Branch 2	Branch 2 Main	17
TST Branch 2 Total		**17**
TST Centennial Library	Centennial Branch	27
TST Centennial Library Total		**27**
TST Main Library	Borrowing Resource Sharing Requests	128
	Cats Display	1
	Demonstration	1,127

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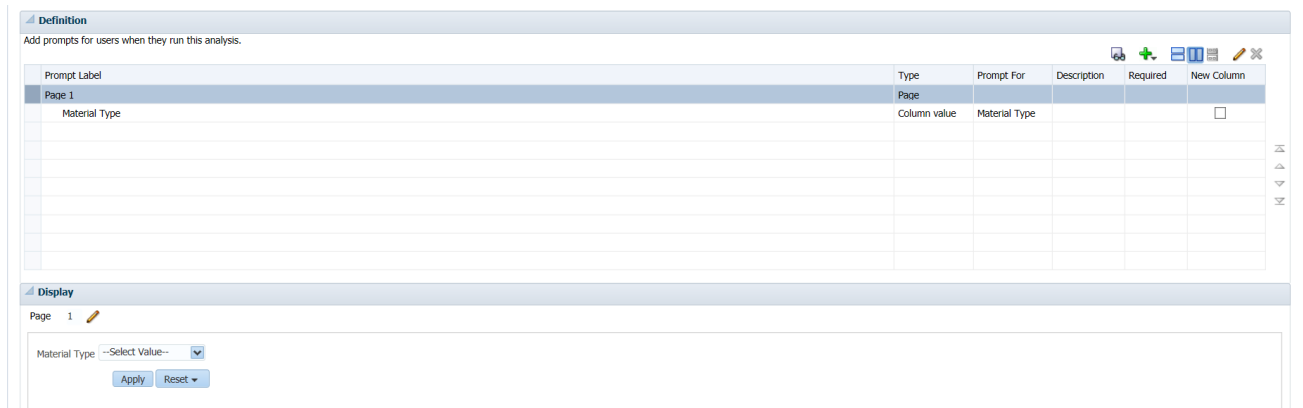
Dashboard

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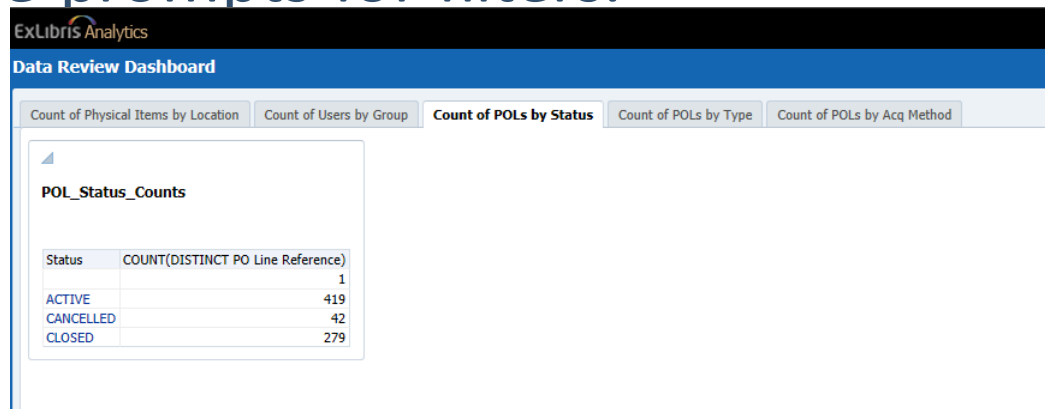
Filters & Dashboard Prompts

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.

Analytics Objects

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

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

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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

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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

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Other Resources

Alma Analytics Documentation

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_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

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Alma Analytics Recordings

- Sharai Perkes "Introduction to Alma Analytics" webinar

  - •Streaming recording link: https://proquestmeetings.webex.com/proquestmeetings/ldr.php?RCID=d380c2e673aca66aaef7349b676b4639

  - •Download recording link: https://proquestmeetings.webex.com/proquestmeetings/lsr.php?RCID=9cb4097afbcaac9a18f5deb2f6124488

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Additional Information

- [Alma Analytics and Evidence Based Decision Making](#)

- [Analytics Benchmark subject area](#)

- [A guide for using statistics for evidence based policy, 2010](#)

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