

Analytics Refresher / Analytics Brush-Up

Hosted by members of the GIL Analytics Committee:

Justin Barnett, Georgia Southern University

Jackie Blanton-Watkins, Kennesaw State University

Sky Martin, University of Georgia

Session summary

Members of the Analytics Committee will talk about some of the basics of accessing Alma's analytics platform, what kinds of information you can access and parse, and then explore in a free-ranging ramble that looks to the audience to provide questions or demo requests.

The session did not include a slideshow presentation and instead consisted of a live demo of features in Alma and Alma Analytics related to analytics and reporting.

Session content

The presenters explored basic and advanced topics like creating and scheduling Analytics Objects and adding Analytics Objects as widgets to the Alma home page, navigating Alma Analytics and different types of folder structures (such as personal, institutional, and shared reports), and common hurdles within the platform. They also fielded questions from the audience and demoed Alma Analytics functionality to answer questions.

Analytics Objects

Analytics Objects are reports and dashboards created in Alma Analytics for other Alma users (usually individuals who do not have access or use Alma Analytics). They can be pinned to an individual's Alma home page as a widget (that is automatically run when the widget is loaded) and can be emailed on a user-defined schedule as an attachment (such as Excel or PDF). Take measures to ensure the Alma Analytics report that the Object is tied to is not deleted or moved as it will break the Object.

Widgets can be useful to catch errors in workflows or problems, such as missing items or items not returned by patrons.

You can add joy to reporting by adding emojis to the title of the Analytics Object (NOT the Analytics Report). Use a site that enables copying and pasting of emojis such as <https://getemoji.com/> or <https://emojicopy.com/>. It should go without saying to be sensitive to the choice of emoji used.

Helpful resources:

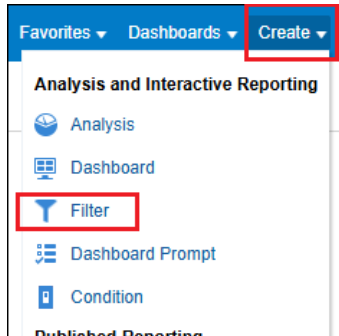
- Working with Analytics Objects,
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/080Analytics/03Working_with_Analytics_Objects](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/03Working_with_Analytics_Objects)

- SUNY LibGuides: Analytics Objects, <https://sunyolis.libguides.com/training-analytics/sharingresults>

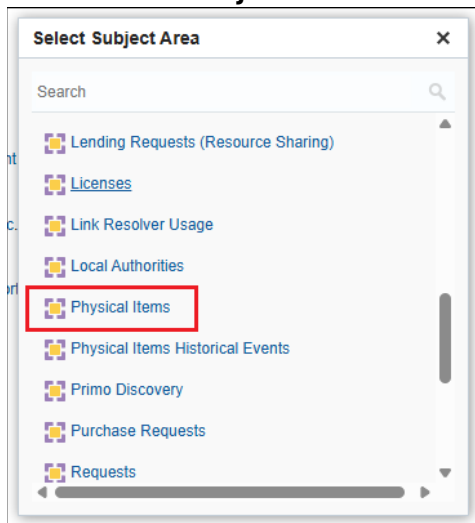
Create a saved filter in Alma Analytics

A good candidate for a saved filter automatically excludes or includes deleted items, holdings, and/or bibliographic records. This example creates a filter that excludes deleted items.

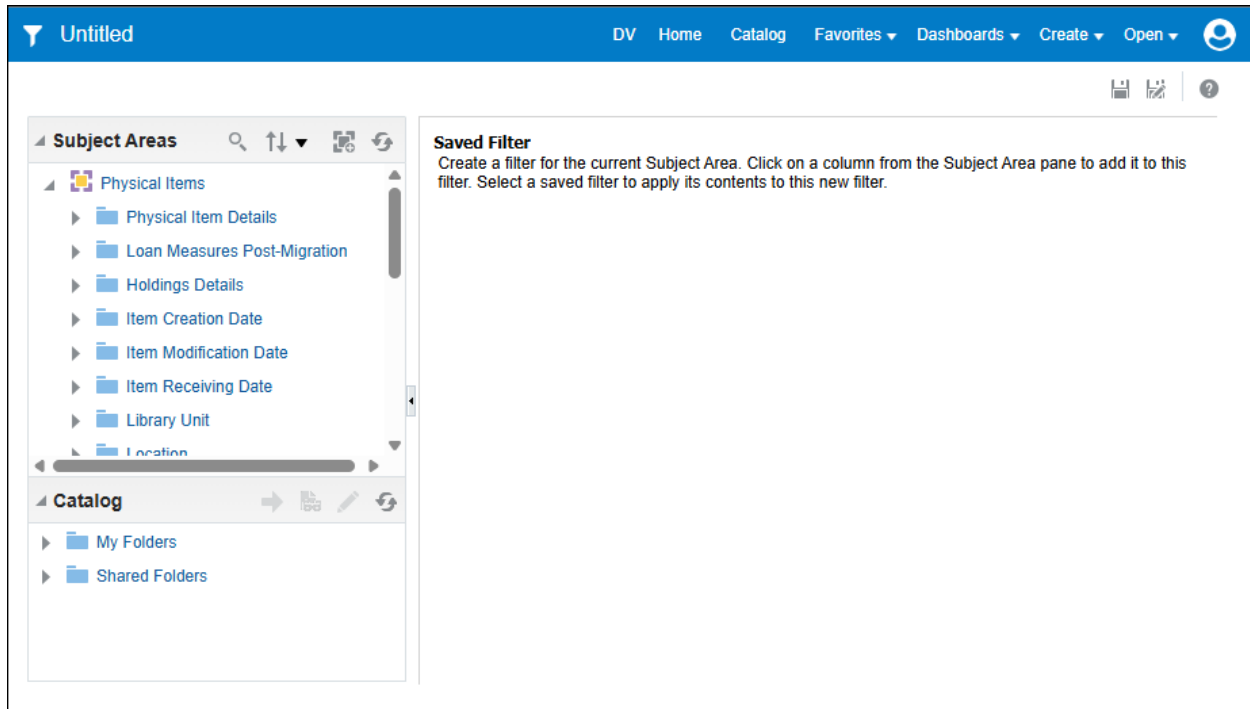
1. Click on the **Create** down-down menu and then click on **Filter**.



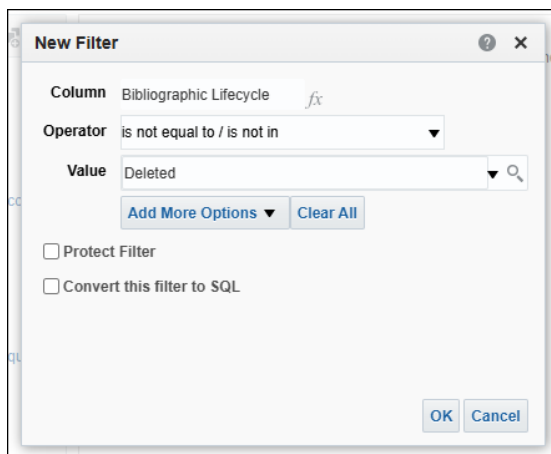
2. A **Select Subject Area** menu will pop up. Select the **Physical Items** Subject Area.



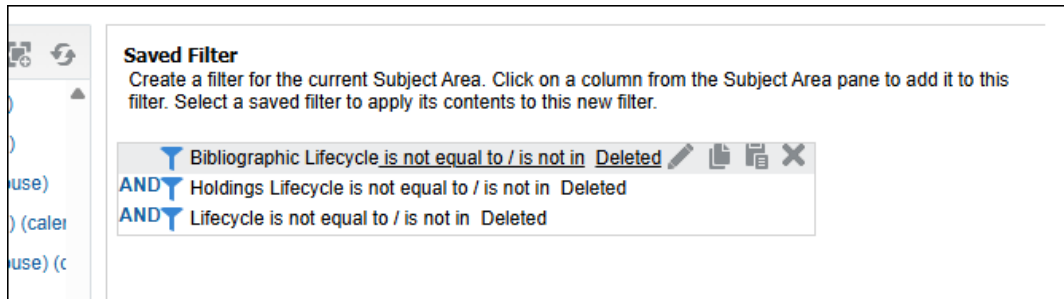
3. The Create Filter page looks very similar to the Create Report page. Double-click on a column to open the New Filter pop-up menu.



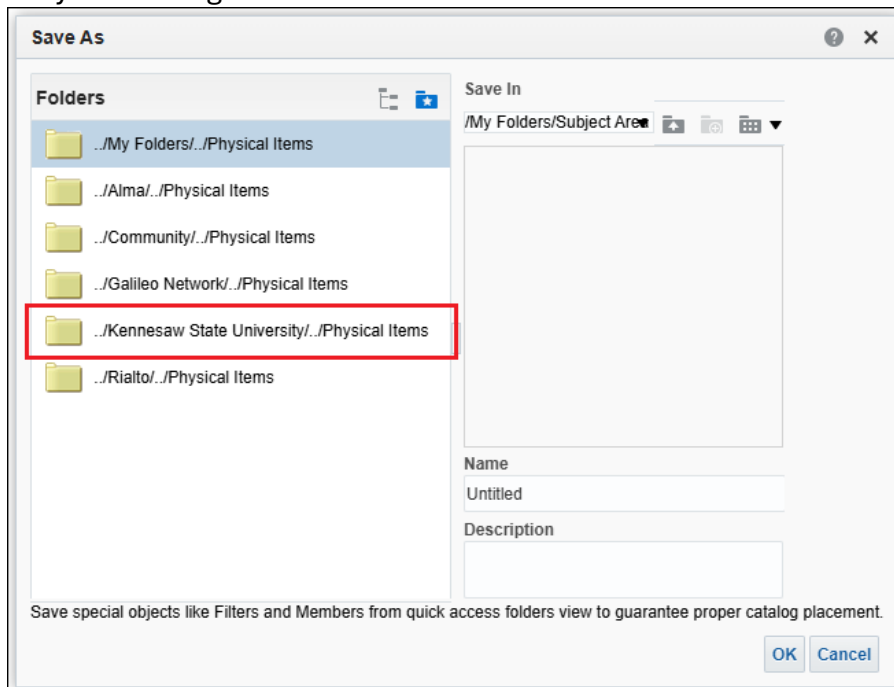
4. Add the filter criteria and click on the OK button.



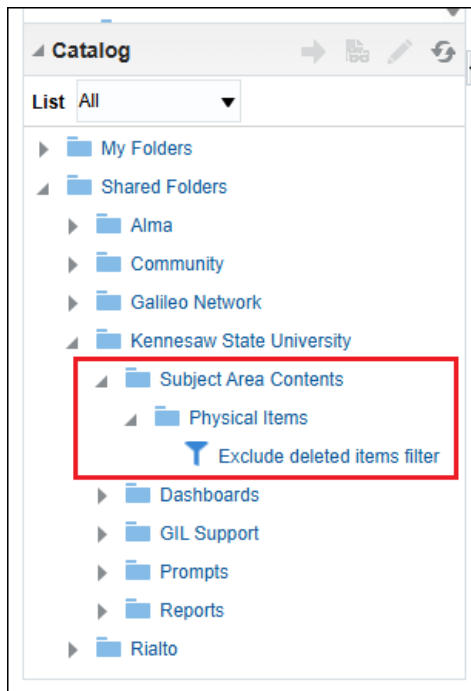
5. This filter has combined the three necessary filters needed to exclude deleted bibliographic, holdings, and item records. Note that the item lifecycle is named only as "Lifecycle."



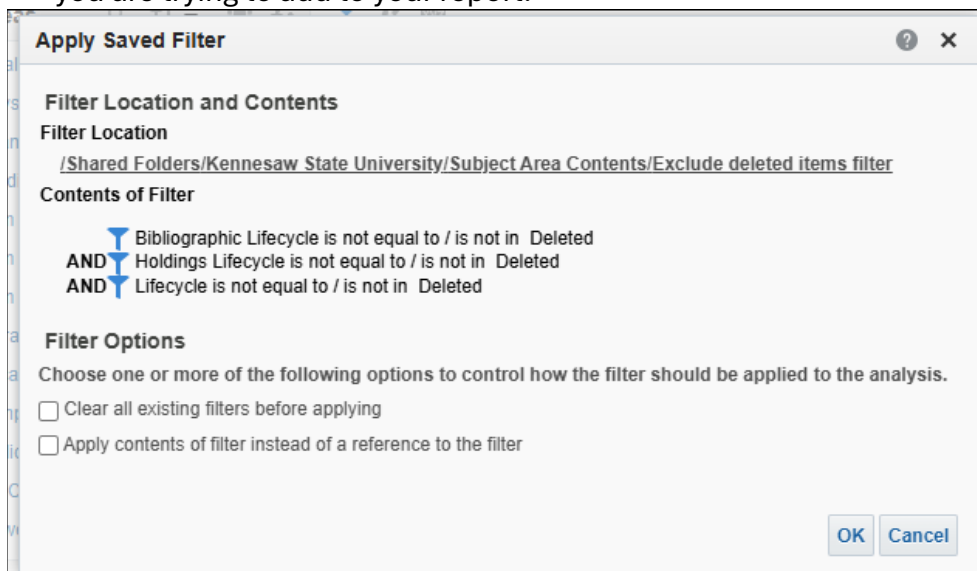
6. Save the filter in your institution's Shared Reports folder so that it is available for use by your colleagues.



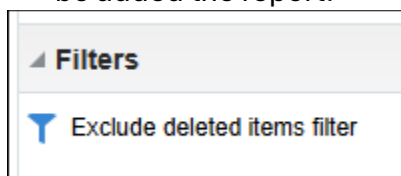
7. When creating a new report or modifying an existing Physical Items Subject Area report, navigate to the **Catalog** navigation menu at the bottom of the report interface. Open the nested folders you saved your filter in and double-click to add the filter to the report.



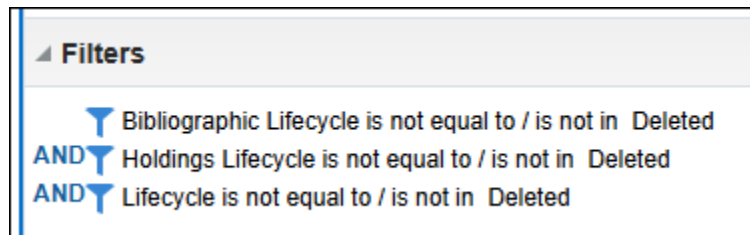
8. In the **Apply Saved Filter** pop-up menu, Analytics will show the contents of the filter you are trying to add to your report.



9. You also have filter options: if you simply click on the OK button, the filter reference will be added the report:



10. If you click the checkbox for “Apply contents of filter instead of a reference to the filter,” the contents of the saved filter will be added to the report instead:



Miscellaneous thoughts

The data in Alma Analytics is not live, it is a day behind (syncs around midnight-2am). If you need “live” data, then an Advanced Search in Alma to create a set might be better to use.

Alma Analytics stores deleted data, so if you need items currently in the collection the Lifecycle must be set to Active/In Repository. For example, to find items currently in the general collection, you must filter for Bib Lifecycle IS NOT Deleted, Holdings Lifecycle IS NOT Deleted, and the item Lifecycle IS NOT Deleted.

The Report URL link in Analytics Objects can be helpful for troubleshooting but can be unreliable, so ask the individual you are assisting to refresh the page if the report does not load.

Building reports that answers the requestor’s question isn’t always the question the requestor asked. Consider the problem the requestor is trying to solve: if they are asking for items loaned over a certain period—ask: do you want the titles of the items, or a total count of the items? Do you need check out trends over a semester/year, or the total for the calendar/fiscal year?

Session conclusion

For your institution, initiate an Analytics clean-up and determine:

- What reports are no longer in use or aren’t relevant?
- What reports are tied to Analytics Objects, and are those Objects still serving a purpose?
- Do you have duplicate reports that can be deleted?
- Would you benefit from re-organizing your institution’s reports and/or establishing guidelines?

AI disclosure

Note that all alt-text for screenshots were created using AI in Microsoft Word and were reviewed and approved by a presenter of this GIL Analytics Committee session.