

# Navigating Alma Analytics

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Before you start, please check with your system administrator to make sure you have the Design Analytics role!



To access Analytics:

First, click on the Blue Alma box

Please access Analytics in your Alma account and go into each section as you go through this slideshow.

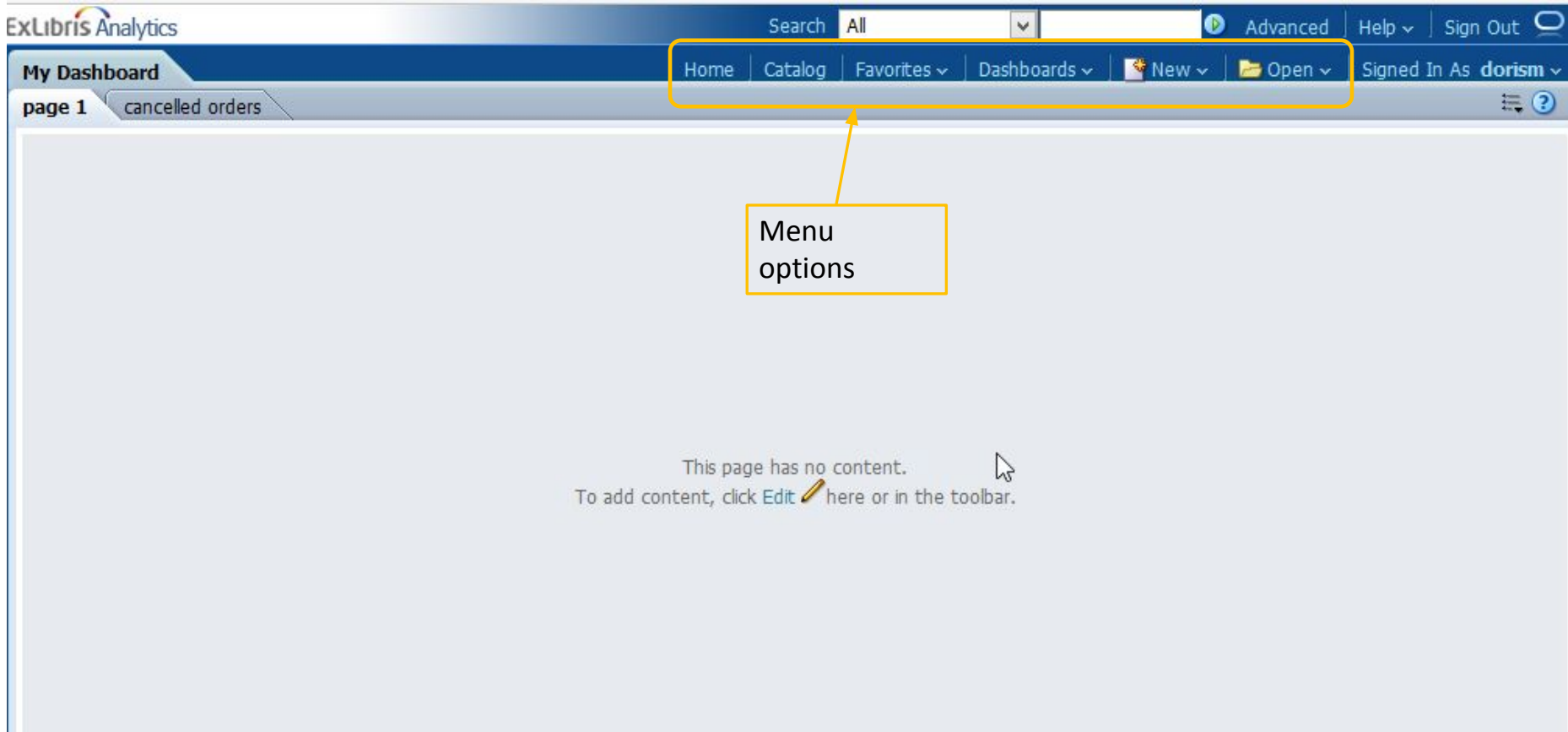


Then, click on

**Administration > Analytics > Design  
Analytics**

(Don't worry if you don't see as many  
options under Administration)

The first screen looks empty. You need to choose one of the menu options. We'll look at each one.



The **Home** tab: See what you've worked on recently, popular reports used by others, and create a new report or analysis

You'll see Create, Recent, and Most Popular appear under other tabs.

The screenshot shows the 'Home' tab of a reporting tool. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As dorism'. The main content area is divided into three sections: 'Create...', 'Recent', and 'Most Popular'. Each section has a red box around its title and a yellow box with a descriptive annotation.

- Create...:** A red box highlights the title. A yellow box contains the text: "Create a new report or Analysis". Below the title are four categories: "Analy... Reporting", "Published Reporting", "Actionable Intelligence", and "Performance Management".
- Recent:** A red box highlights the title. A yellow box contains the text: "What you've done recently". Below the title is a "Dashboards" section with "My Dashboard - page 1" and an "Others" section with a grid of report thumbnails.
- Most Popular:** A red box highlights the title. A yellow box contains the text: "Popular Analytics created by others". Below the title is a grid of report thumbnails.

**Home** | Home | Catalog | Favorites | Dashboards | New | Open | Signed In As dorism

**Create...** Create a new report or Analysis

Published Reporting  
Report | Report Job | More

Actionable Intelligence  
Action

Performance Management  
KPI | KPI Watchlist

**Browse/Manage...**

- All Content
- My Analyses
- My Reports
- My Scorecards
- My Agent Subscriptions
- My Agents
- Marketing Jobs
- Report Jobs
- Report Job History

**Get Started...**

**Recent** What you've done recently

Dashboards

- My Dashboard - page 1  
Open | Edit | More

Others

- Lost and Missing All DMM  
Open | Edit | More
- Lost and Missing JFK Upper...  
Open | Edit | More
- ll except cc 051116  
Open | Edit | More
- Lost and Missing LL except ...  
Open | Edit | More
- Lost and Missing Curriculum...  
Open | Edit | More
- Liaison\_Munson  
Open | Edit | More
- Summit requests dm  
Open | Edit | More
- Summit loans to other libra...  
Open | Edit | More
- Summit Loan Counts by Cir...  
Open | Edit | More

**Most Popular** Popular Analytics created by others

- Number of loans  
Open | Edit | More
- ...nic resources newly ...  
Open | Edit | More
- EWU All Allocated Funds ALE  
Open | Edit | More
- Top 5 vendors spending Y...  
Open | Edit | More
- Expenditures per material t...  
Open | Edit | More
- Fulfillment Dashboard - Loa...  
Open | More

# The **Catalog** tab: Find Analytics created by Ex Libris, other Alma libraries, and by our library

The screenshot displays the Alma Catalog interface. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As doris'. The main content area shows a list of analytics reports under the 'My Folders' location. The reports are sorted by name (A-Z) and include details such as last modified date and owner. A mouse cursor is hovering over the 'Count of users by group' report.

**Catalog** Home **Catalog** Favorites Dashboards New Open Signed In As doris

Location /My Folders Show Hidden Items

Type All Sort Name A-Z Show More Details

- My Dashboard** | Last Modified 11/19/2015 12:24:24 PM | Owner 90061124320001843\_1843\_D  
Expand | Open | Edit | More
- Subject Area Contents** | Last Modified 11/19/2015 12:24:24 PM | Owner System Account  
Expand | More
- Acquisitions orders placed, cancelled, completed** | Last Modified 11/19/2015 12:24:24 PM | Owner 90061124320001843\_1843\_D  
Open | Edit | More
- Count of users by group** | Last Modified 11/19/2015 12:24:24 PM | Owner 90061124320001843\_1843\_D  
Open | Edit | More
- dm dates to receive** | Last Modified 12/6/2015 7:13:14 AM | Owner 90061124320001843\_1843\_D  
Open | Edit | More
- dmm Count of Items Loaned - Top 10** | Last Modified 11/19/2015 12:24:24 PM | Owner 90061124320001843\_1843\_D  
Open | Edit | More
- Events with percentage breakdown** | Last Modified 11/19/2015 12:24:24 PM | Owner 90061124320001843\_1843\_D  
Open | Edit | More
- Fines and fees charged** | Last Modified 11/19/2015 12:24:24 PM | Owner 90061124320001843\_1843\_D

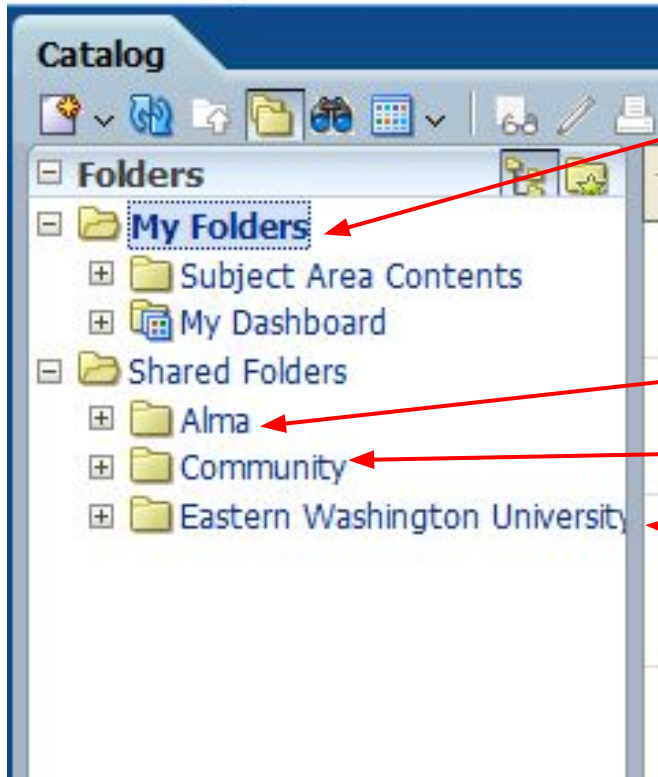
**Folders**

- My Folders
- Shared Folders
  - Alma
  - Community
  - Eastern Washington University

**Tasks**

- My Folders
  - Expand
  - RSS
  - Delete
  - Copy
  - Rename
  - Create Shortcut
  - Properties
  - Permissions

# Folders in the Catalog tab



## My Folders

- Visible only to you
- Here is where you store reports that you are working on and don't want to share with others in your institution

## Shared Folders

- Alma folder: visible to everyone
  - Canned reports created by Ex Libris
- Community folder: visible to everyone
  - Reports created and shared by other Alma libraries
- Institution's folder: visible to that Institution's staff
  - Reports created by Institution staff



## Exercise:

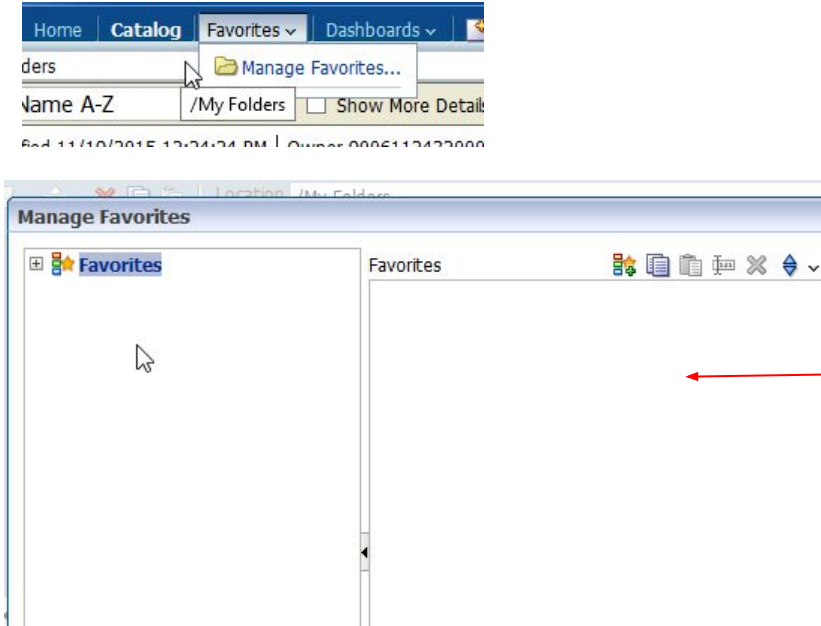
Poke around in the Catalog section and see what reports are already there for you to use.

- If you click on Open, the report will open with your library's data.
- An error message can occur for several reasons.
  - There are too many results
  - The report is intended to be used with a prompt
  - The report doesn't work with your library's data

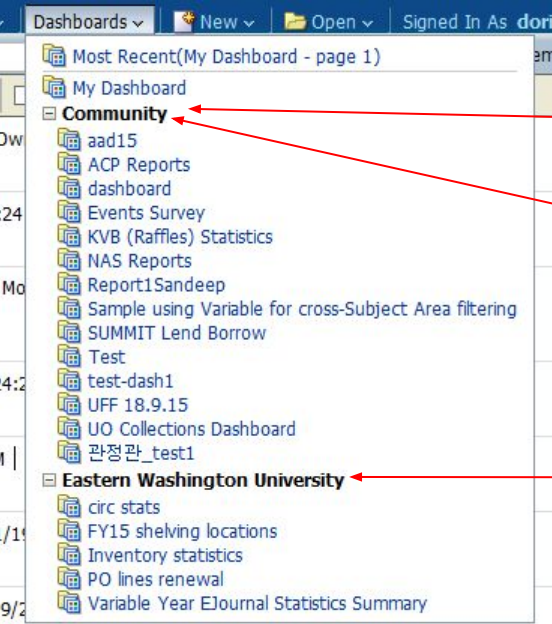
Save an existing report to your folder or your institution's folder if you want to customize the report.

- That's another slideshow.

The **Favorites** tab: this is where you can store frequently used analyses/reports.



The **Dashboards** tab is a shortcut to all available dashboards that are saved in dedicated dashboard folders.



Dashboards only visible to you

Dashboards contributed by other libraries

Dashboards visible to your institution

The New tab is where you can create new analyses or reports



Analysis is used to create a new report

Report

The **Open** tab is where you can open the Catalog tab, recent reports you have viewed, and what other libraries are frequently accessing

The screenshot shows a web application interface with a navigation bar. The 'Open' menu is open, displaying two columns of reports: 'Recent' and 'Most Popular'. A red box highlights the 'Open...' menu item with the text 'Open... opens Catalog tab'. An orange arrow points from the 'Recent' column to a red box containing the text 'Recent: a list of reports you recently viewed'. Another orange arrow points from the 'Most Popular' column to a red box containing the text 'Most popular: Reports accessed most often by Alma libraries'.

Open... opens Catalog  
tab

Home Catalog Favorites Dashboards New Open Signed In As d

Open...

**Recent**

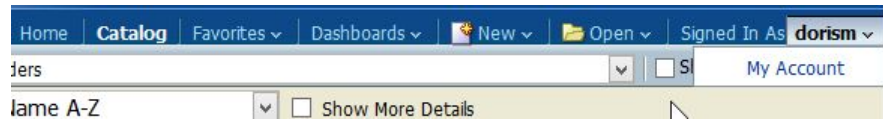
- My Dashboard - page 1
- Lost and Missing All D...
- Lost and Missing JFK U...
- Il except cc 051116
- Lost and Missing LL ex...
- Lost and Missing Curric...

**Most Popular**

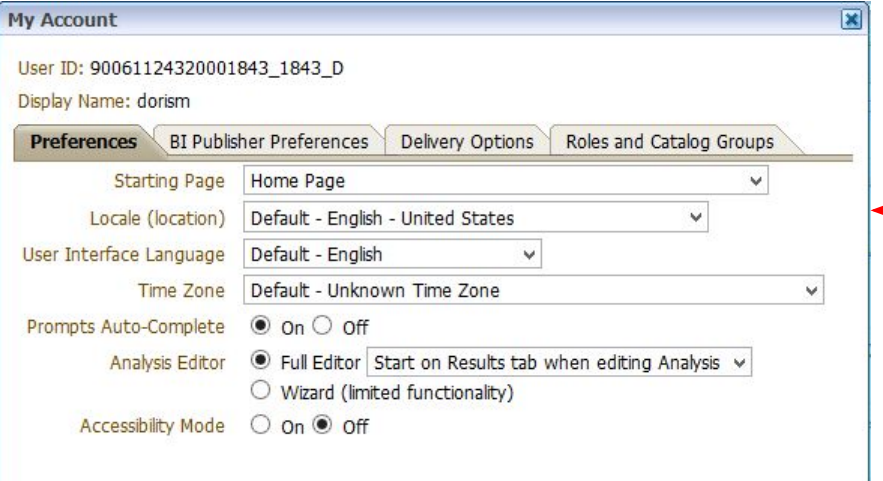
- Number of loans per ...
- Electronic resources n...
- EWU All Allocated Fun...
- Top 5 vendors spendi...
- Fulfillment Dashboard ...
- Expenditures per met...

**Recent:** a list of reports you recently viewed

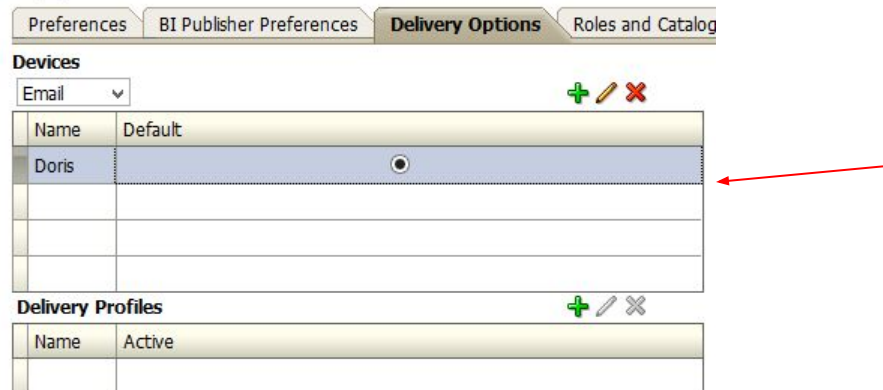
**Most popular:** Reports accessed most often by Alma libraries



**My Account:** while not a tab, it is where you can control settings related to your Analytics account



Set your Analytics Home Page



Set up email delivery options

The **Search** box is where you can search for reports or folders

The screenshot displays the ExLibris Analytics interface. At the top, there is a search bar with the text 'Search All' and a dropdown arrow. To the right of the search bar is a button labeled 'Advanced' which is highlighted with a red box. Below the search bar is a navigation menu with 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Sign'. The main content area shows search results for the term 'circ'. The results are listed in a table-like format with columns for 'Type', 'Name', 'Last Modified', and 'Owner'. The results include folders and reports such as 'circ stats', 'Circulation', 'Circulation & Resource Sharing', and '3.1 Circulation of Strong Room items for previous day'. A red arrow points from the 'Advanced' button to a text box that says 'Advanced Search opens here'. Another red arrow points from the top search bar to the main text at the top of the image.

ExLibris Analytics

Search All

Advanced

Catalog

Home Catalog Favorites Dashboards New Open Sign

Location Search Result

Search

Search circ

Location All

Type All

Search

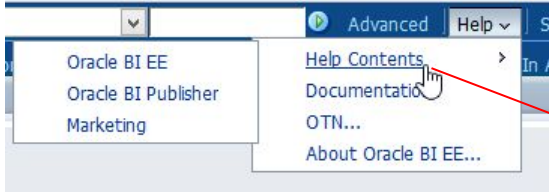
Advanced Search opens here

Type All Sort Name A-Z Show More Details

Type	Name	Last Modified	Owner
Report	circ stats	11/19/2015 11:14:55 AM	90061122170001843_1843_D
Folder	Circulation	2/23/2016 11:33:26 PM	90061124320001843_1843_D
Folder	Circulation & Resource Sharing	2/19/2016 10:32:04 AM	99863450000579_579_D
Folder	Circulation & Resource Sharing	11/19/2015 11:13:46 AM	exlobi
Folder	Circulation & Resource Sharing	2/19/2016 10:32:03 AM	427587050001854_1854_D
Report	3.1 Circulation of Strong Room items for previous day	5/6/2016 10:31:40 AM	Tanya
Report	3.1 Circulation of Strong Room items for previous day	4/29/2016 10:31:41 AM	Owner

# Help > Help Contents > Oracle BI EE

Written for Oracle Users; Alma-L is probably a better source for help



Oracle® Business Intelligence Enterprise Edition Help  
11g Release 1 (11.1.1)

 [Contents](#)

## What Are Analyses?

An analysis is a query against an organization's data that provides answers to business questions. A query contains the underlying SQL statements that are issued to the Oracle BI Server.

Analyses let you explore and interact with information by visually presenting data in tables, graphs, pivot tables, and so on. You can save, organize, and share the results of analyses.

Analyses that you create can be saved in the Oracle BI Presentation Catalog and integrated into any Oracle BI EE dashboard. Analyses can be enhanced through features such as graphs, result layout, calculated items, and drilling.

## How Do I Work with Analyses?

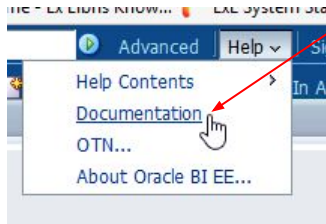
To work with analyses, you use one of the following editors:

- The **"Analysis editor"** — A more complex editor that allows you to explore and interact with information by visually



# Help > Documentation

Not very useful



## Oracle Fusion Middleware Online Documentation Library 11g Release 1 (11.1.1.7)

Business Intelligence

Business Intelligence

[Installation Guide](#)



[Quick Installation Guide](#)



[Upgrade Guide](#)



Comments or Questions?

Consider emailing the  
discussion list for your area  
and asking for help.