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

This folder is empty because nothing has been added to it yet.
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.

- **Open… opens Catalog tab**
  - **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.
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 presenting data in tables, graphs, pivot tables, and so on. For more information, visit Help > Oracle BI EE > Documentation > OTN...
Help > Documentation
Not very useful
Comments or Questions?

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