

**Alliance Team:** Systems  
**Meeting:** Open Call  
**Date:** November 9, 2016  
**Series:** Alma Analytics  
**Topic:** Introduction, Folder Structure, and Canned Reports  
**Presenter:** Maria McShane

### What is it?

Alma Analytics provides a way for users to run reports against their Alma data. This data is fed from Alma into an Oracle database. A user interface is provided to create queries. A query is a request for data based on certain criteria.

A query in Analytics is called an **analysis**.

### Is there an Analytics for Primo?

Yes. You can access it through the Primo Back Office. Your administrator can also assign a staff user account with the Reporting role if you don't currently have access to the PBO. *(Not part of this tutorial)*

### Is there a sandbox?

There is no sandbox for Analytics because users can only run reports. Analytics does not allow users to alter data, so there is no need for a sandbox.

### When is the data refreshed?

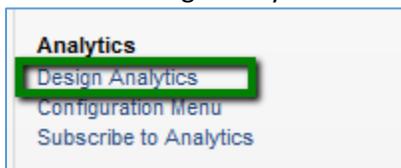
Changes made before 4pm will be reflected the next day. Changes made after 4pm will be reflected two days later.

*Example 1: Expenditure made at 3pm on Monday. Analytics will reflect that change on Tuesday.*

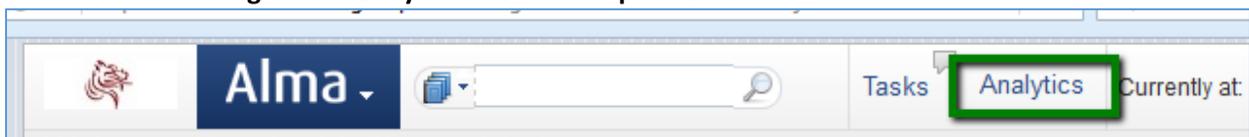
*Example 2: Expenditure made at 5pm on Monday. Analytics will reflect that change on Wednesday.*

### How do I access Alma Analytics?

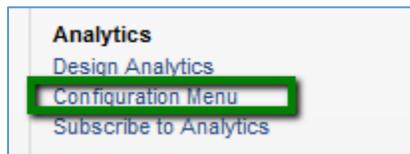
1. You need the **Design Analytics** role added to your Alma record.
2. If you have this role, you will see an Analytics section, under Administration, in the main Alma navigation menus (clicking on the big, blue Alma button).
3. Click on Design Analytics.



### Is this the same thing as the Analytics link at the top of Alma?



No. Clicking this link displays a dropdown list of dashboards. These dashboards are created in Analytics. The dashboards are added to this list using the Configuration Menu under Analytics in Alma. *(Not part of this tutorial.)*



### What is available in the interface?

There are 3 menu/navigation bars.



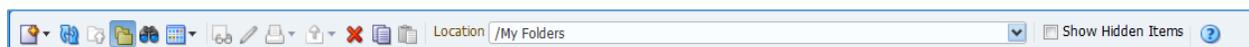
The top bar provides the user with:

1. Simple searching - most likely you'll be searching for an analysis
2. Advanced search link
3. Help
4. Sign out



The blue bar provides navigation and functionality:

1. Home - return to your home screen
2. Catalog - open the catalog of all analyses, dashboards - these include your own folders and shared folders
3. Favorites
4. Dashboards
5. New - here is where you can create a new analysis, dashboard
6. Open
7. Signed In As - access to your account

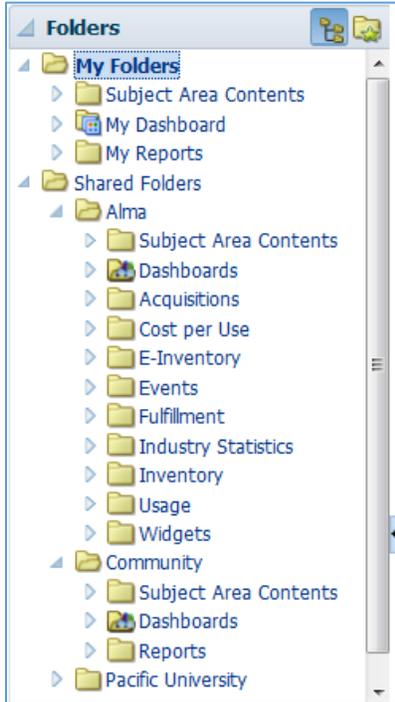


The menu bar appears when in the Catalog and provides options for creating, refreshing, printing, deleting, and copying new items ... and more.

## What is the folder structure of the Catalog?

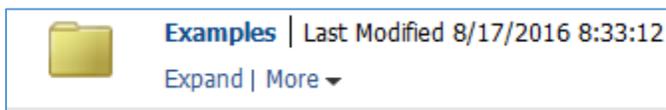
There are 4 areas of note:

1. My Folders -- this is where a user can store reports and dashboards for his/her use only.
2. Shared Folders - Alma -- These are canned reports provided by Alma.
3. Shared Folders - Community -- Reports can be shared amongst other Alma users here.
4. Shared Folders - [Your Institution] -- This is where you can create dashboards and reports shared within your institution.



Expand: opens the folder

More: Provides more functionality, such as pasting a new report into the folder



## How do I copy a report?

*First way:*

Highlight the report and click the copy icon.

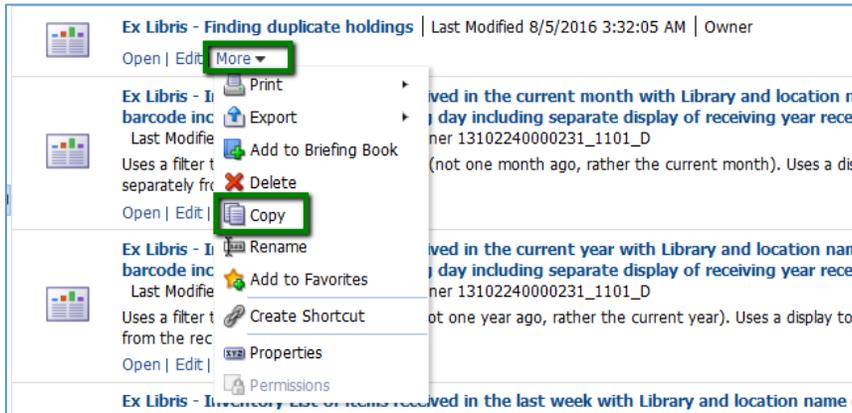


Go into the destination folder and click the Paste icon.

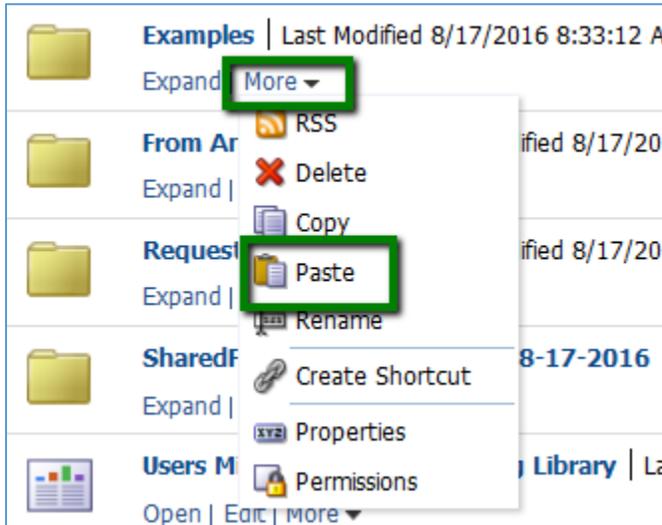


Second way:

Underneath the report you want to copy, choose More, then choose Copy.

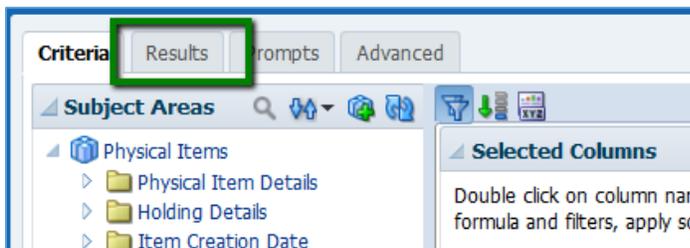


Underneath the destination folder, choose More, and then choose Paste.



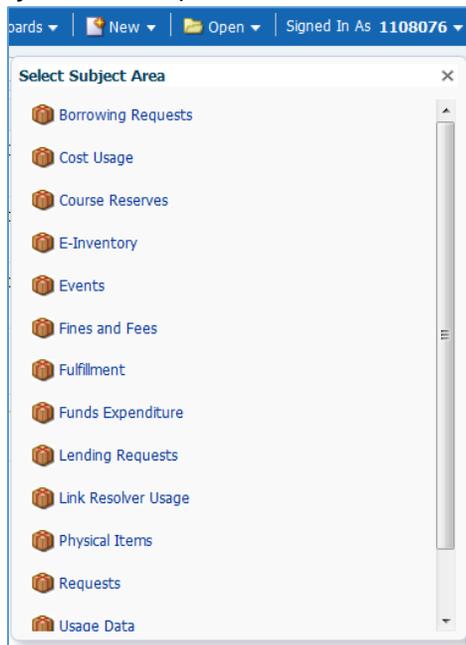
### How do I run a report?

Click on the Open link underneath a report. You can also click Edit, and within the Edit screen, click on the Results tab.



## Subject areas

Data coming from Alma is split into Subject Areas. Within each area are folders of data. This is where you can create a report, filter it for certain conditions, write SQL, and choose some formatting. *(Not part of this tutorial.)*

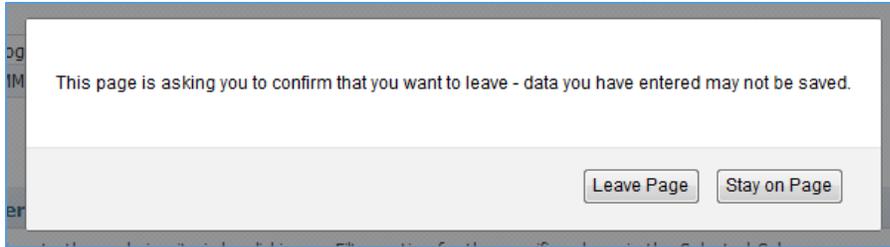


## Any other tips?

1. **Analytics times out.** You may need to close Analytics, refresh Alma, and re-open Analytics. If you see the screen below, just close out the browser page, refresh Alma, and open Analytics again.



2. **Copy/paste reports,** don't click/drag them. When you click and drag reports from one folder to the other, you are moving, not copying the report.
3. You will receive a prompt if did not save changes to a report. If you want save the changes, click Stay on Page and then save the report.



**Is there Help documentation?**

Yes.

*ExLibris Knowledge Center:*

**Product Documentation:**

[http://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_%28English%29/Analytics](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Analytics)

**Alma Analytics in Extended Training:**

[http://knowledge.exlibrisgroup.com/Alma/Training/Extended\\_Training/Alma\\_Analytics](http://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Alma_Analytics)

**Advanced Topics in Ask the Expert:**

[http://knowledge.exlibrisgroup.com/Alma/Training/Ask\\_the\\_Alma\\_Expert/Advanced\\_Topics\\_in\\_AnalytiCS](http://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/Advanced_Topics_in_AnalytiCS)

*Listserves:*

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