

General FAQs

General

What reporting and statistical options are available in Alma?

Alma Analytics is used for the generation of a variety of reports, as well as for generating statistics from various library activities. Analytics is built into Alma throughout the system and is very flexible. Alma comes with a wide range of preconfigured reports and dashboards, all of which are customizable. In addition, designated staff may create reports of interest to other roles within the library and provide dashboards for staff, enabling them to access the defined reports.

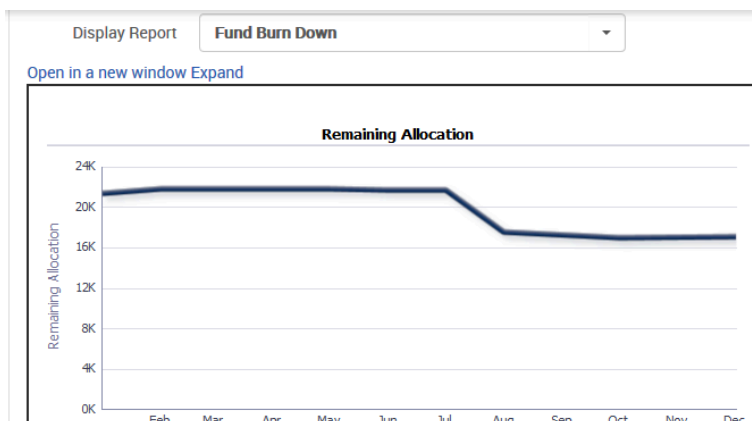
Alma's analytics function provides a Business Intelligence solution centrally installed on Alma servers in the cloud. The solution serves all Alma customers, but the data of each institution is separated from other institutions, based on the Alma SaaS model. Alma Analytics is designed to work over the Web and in the cloud so libraries can run out-of-the-box reports as well as create and run ad-hoc reports without the need for third-party reporting tools. Consortium members also have the ability to run reports on the level of the network.

Alma Analytics provides a full suite of capabilities for creating and exposing reports, and presenting dashboards of summary data using this tool:

- From screens within Alma;
- From dashboards specifically tailored to a particular staff role;
- As widgets that are accessible from lobby areas within Alma; and
- As pushed reports, sent to the interested staff as emails.

All reports can be exported in CSV, Excel or PDF.

In addition to the out of the box reports, Alma Analytics includes embedded reports as shown below:



Alma analytics includes data from different business areas (such as funds expenditure, loans, acquisitions, bibliographic data and more) and was built in mind both for operational day to day reports such as outstanding orders by supplier/fund/material type or a fund transaction report as well as for more analytical, decision support reports, such as most frequently used and least frequently used journals.

Alma roles determine which users can create reports (report designers) and which users can only view reports (report consumers).

Alma provides for the automated dissemination of reports. For example, library staff can schedule a report to run periodically; authorized staff may then subscribe to the report and receive the output in an email sent automatically based on the report schedule (e.g. daily, weekly, monthly). In this way, a staff member can get to his/her email report at fixed intervals without the need to log into Alma.

How often is data exported from Alma to Alma Analytics?

A snapshot of data is taken from Alma every 24 hours. The ETL process then takes place. An example of the daily status: "Data updated as of: 12/06/16 02:00. Data available as of: 12/06/16 06:05"

Data available as of: 18/06/2017 04:49	Data updated as of: 18/06/2017 02:01
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Are all Alma fields included in Alma Analytics?

No, all Alma fields are not included in Alma Analytics. The decision to selectively include fields is based on several factors, including data governance and performance optimization. By curating the available fields, Alma Analytics ensures that users receive meaningful insights without compromising system performance.

- **Data Governance:**
 - Alma Analytics aims to provide meaningful insights to users. By selectively including relevant fields, the system ensures that reports and dashboards remain focused on essential information. For example, some fields in Alma can have multiple values or are hierarchical. Adding these fields to Analytics can result in complex data structures that are difficult to include in reports.
 - Adding all fields could introduce noise and clutter, making it harder for users to find the data they truly need.
- **Performance Optimization:**
 - Adding all fields to Analytics could burden the system with excessive data. This can impact performance, causing slowness and affecting the overall user experience.
 - By selectively choosing which fields to include, Alma ensures that the most valuable and relevant information is available in Analytics without compromising system performance.

You can request the addition of Alma fields to analytics in one of two ways:

- **Idea Exchange:** Submit your ideas for adding new fields to Alma Analytics through the Idea Exchange platform. This allows you to share your suggestions with the community and vote on ideas proposed by others. The Alma Product Team actively reviews and addresses highly voted ideas.
- **Community of Practice:** Customers can also engage with the Community of Practice, which maintains close collaboration with Alma Product teams. Regular communication ensures that customer feedback and needs are considered in product development.

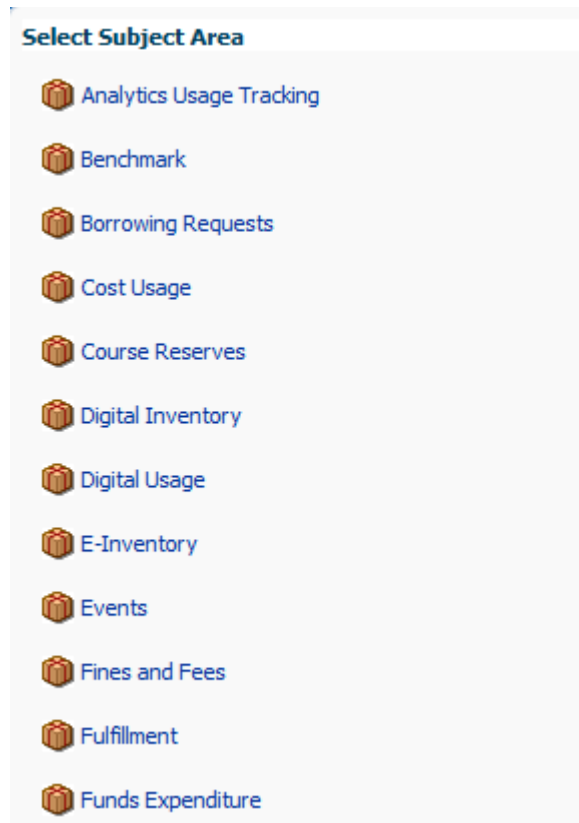
In summary, Alma's approach balances the need for comprehensive data with system performance considerations. By selectively adding fields, Alma ensures that Analytics remains efficient and provides valuable insights to users. Users can actively contribute to field selection through the Idea Exchange or engage with the Community of Practice.

How does Alma support reporting on activity in the library?

Alma includes advanced data analytics, Alma Analytics, based on a worldwide leading Business Intelligence platform:

Oracle Business Intelligence Enterprise Edition (OBIEE). Alma Analytics is fully integrated into Alma and transparent to the end user.

The data warehouse is organized into subject areas which are designed as a star schema and which classifies the attributes of an event into facts (measures) and descriptive dimensions.



The benefits of a star schema are:

- Simpler queries - star schema joined logic is generally simpler
- Simplified business reporting logic
- Query performance gains - star schemas can provide performance enhancements for read-only reporting applications
- Fast aggregations - the simpler queries against a star schema can result in improved performance for aggregation operations

Reports which cross subject areas are possible through dimensions, which are shared by multiple subject areas. For example, Classification is a joint dimension of Expenditure and Circulation subject areas so it is possible to create reports that match expenditure and usage of a specific location.

All reports are exportable in PDF and HTML format. In addition, each component within a report (chart, table etc.) can be exported in a variety of formats including Excel, XML, CSV. In addition, reports can be scheduled to be sent as email outputs to authorized staff on a regular basis.

What options are there for combining data elements for reporting?

Data elements and subject areas in Alma Analytics can be combined.

There is however a minor limitation, and that is a relational database restriction:

It is not possible to combine different subject areas if there is not a common dimension with measures.

However, to overcome this, Alma Analytics has added dimensions from many subject areas to other subject areas.

For example fund information from the "Funds Expenditures" subject area has been added to the "Physical Items" subject area.

Similarly, "Course Reserves" information has been added to the "Fulfillment" subject area.

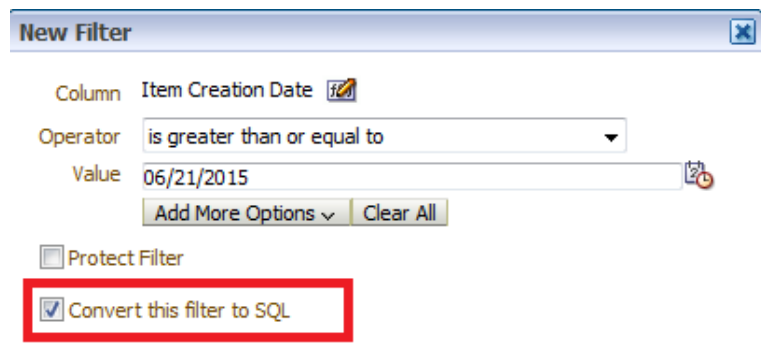
Can SQL be used in creating reports?

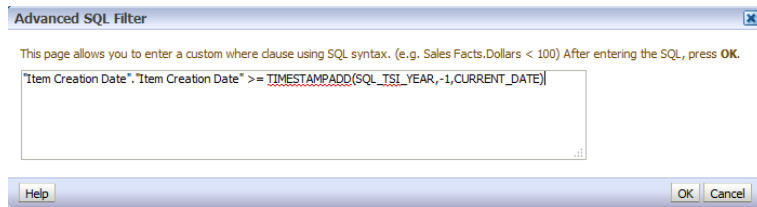
All queries in Alma analytics can be converted to SQL and retrieved via SQL. For example:

In the first screenshot items created on or after June 21 2015 will be retrieved.

In the second screenshot items created a year or more ago will be retrieved.

This is an automatic SQL filter whereby it will always be "one year ago" regardless of when the report is run.





Can Alma produce reports on all data held?

Analytics is built into Alma throughout the system. The following illustrates the “subject areas” available for reporting :

Funds Expenditure – provides fund transactions details (allocation, expenditure and encumbrance) combined with PO and invoice data
Fulfillment – provides detailed loan history information
E-Inventory – provides detailed electronic inventory related information (for example, packages, portfolios, and services)
Physical Items (formerly Inventory) – provides detailed print inventory related information (for example, titles, holdings, locations)
Borrowing Requests – provides details on the borrowing side of ILL requests
Lending Requests – provides details on the lending side of ILL requests
Usage Data – provides COUNTER related data – currently supporting DB and Journal reports
Cost Usage – combines cost data derived from PO line and usage taken from COUNTER
Fines and Fees – provides patron related fines and fees information
Events – a generic area to investigate events triggered in Alma (almost any activity in Alma creates an event. For example, each time an MMS is created, updated, or deleted an event is generated.)
Users – provides detailed information on users (for example, details, contact information, and roles)
Requests – provides detailed information on requests (for example Request Date, Pickup Location, and Material Type Description)

Can patron information be anonymized in analytic reports?

Fields that contain identifying information of users can be anonymized when creating Alma Analytics reports. Anonymizing this data allows the library to generate reports for statistics and trends without violating privacy concerns or local privacy-related laws.

If the parameter `analytics_anonymize_user_details` is set to true then when you create a report, fields that usually contain identifying information for users are left blank.

What documentation related to report creation is available?

Ex Libris provides training and detailed documentation and examples to help users create custom reports. Besides using and customizing the many out of the box reports, staff can also create new reports to provide the institution with information on library activities. The simplest way to create a report is based on one subject area. There are cases in which you need to combine data from more than two subject areas, which is a more complex process that requires understanding of the data dependencies. Detailed instructions are provided in the documentation.

Field descriptions for the various subject areas in Analytics are available in the documentation, which is now openly available on the Ex Libris Knowledge Center

Ex Libris also offers additional Expert Services for libraries that are already in production. During an Expert Service engagement, a product expert may analyze opportunities for workflow efficiencies, set up new services, or build custom reports. These and other services can be adapted as the library’s unique requirements develop.

Does Alma provide real time data reporting?

Reporting that is run from within the Alma interface, as opposed to using the Alma Analytics functionality is real time. Alma Analytics is based on a data warehouse created from the online transaction databases and does not run any queries directly on the operational system. This means that there is no interference with the operations of the system.

Data is refreshed on a daily basis from the operational data into Alma Analytics.

[ARL Reports](#)[Acquisitions Dashboard](#)[Fulfillment and Usage](#)[Loan Statistics](#)[Metrics Dashboard](#)[Overdue & Lost Dashboard](#)[Vendor Reports](#)

Data updated as of:

05/04/2016 03:00

Data available as of:

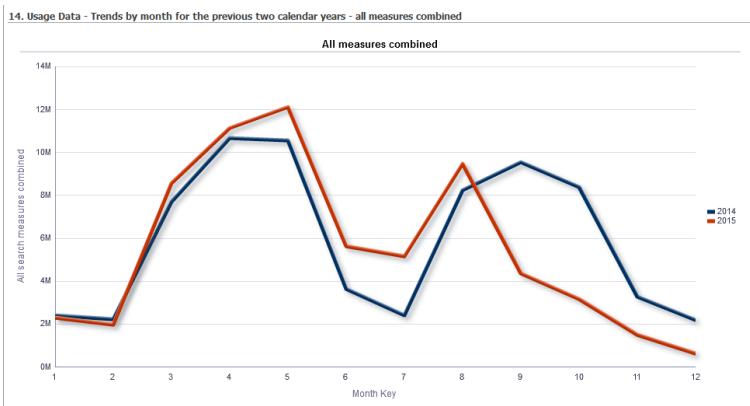
05/04/2016 06:54

Can Alma analyze trends in historical data?

Historical data can be analyzed in all areas such as electronic usage, physical usage (loans etc.) and expenditures as well as "cost per use".

Below are three screenshots showing:

- Overall electronic usage for the past two years by month.
- Electronic usage for which there has been an increase in usage in the past two years.
- Electronic usage for which there has been a decrease in usage in the past two years.



15. Usage Data - Changes in previous two calendar years - Increase in Usage

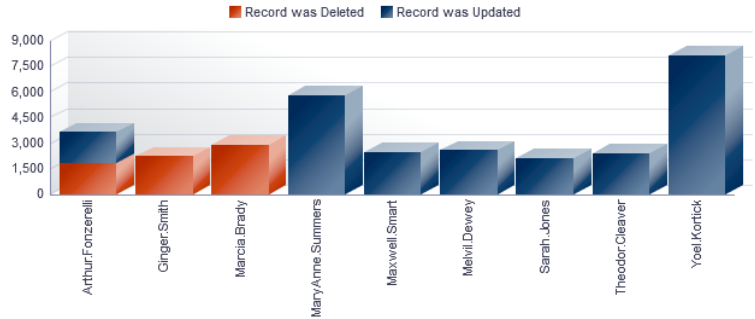
Title	Journal Usage Counter Two years ago	Journal Usage Counter One year ago	Journal Usage Counter Change (One year ago - Two years ago)	% change (One year ago - Two Years ago) / Two Years ago
"Before I Forget...": Journal of the Poyntzpass and Distic...	4	6	2	50%
"Folia Forestalia Polonica, Seria A - Forestry"	0	1	1	
'Atiqot / נתיקות	17	85	68	400%
'Ilu Revista de Ciencias de las Religiones	0	1	1	
100 Mile House Free Press	0	1	1	
12th International Conference on Finance & Banking: Struc...	1	8	7	700%
1895: Bulletin de l'Association Fran'aise de Recherche su...	0	3	3	
19th Century Music	247	3,784	3,537	1432%
2.5G-4G	0	1	1	
20 Century British History	158	351	193	122%
20-20 Magazine	13	21	8	62%
24x7 (Online)	0	2	2	
2D Materials	23	132	109	474%
3 Biotech	38	61	23	61%
34th World Small Animal Veterinary Association Congress, ...	0	1	1	
3D Printing in Medicine	0	11	11	
3D Research	15	25	10	67%

16. Usage Data - Changes in previous two calendar years - Decrease in Usage

Title	Journal Usage Counter Two years ago	Journal Usage Counter One year ago	Journal Usage Counter Change (One year ago - Two years ago)	% change (One year ago - Two Years ago) / Two Years ago
1-800 FLOWERS.COM, Inc. SWOT Analysis	4	0	-4	-100%
11th International Conference on Finance & Banking: Futur...	2	0	-2	-100%
24x7	13	9	-4	-31%
2nd International Scientific Conference "Tourism in South...	4	0	-4	-100%
33 Metal Producing	9	0	-9	-100%
3CMedia: Journal of Community, Citizen's & Third Sector M...	4	3	-1	-25%
3D	1	0	-1	-100%
3D Printing and Additive Manufacturing	41	28	-13	-32%
40 [degrees] South	13	11	-2	-15%
401 (k) Advisor	8	5	-3	-38%
48 Hours [CBS] (USA)	1	0	-1	-100%
4D International Journal of IT and Commerce	7	5	-2	-29%
4OR	19	13	-6	-32%
4Ps Business & Marketing (India)	1	0	-1	-100%
7 Days (Dubai, United Arab Emirates)	2	0	-2	-100%
7-Eleven, Inc. SWOT Analysis	8	0	-8	-100%
7.30	43	11	-32	-74%

Can reports on cataloging activity be generated?

Alma contains an out of the box report called 'Cataloger Activity' which includes a table and graph of cataloger activity showing staff users and how many records they created, updated and deleted (top ten). The year filter is prompted.



Can Alma Analytics interface with other systems?

Alma Analytics can interface with other systems via the extensive APIs which can be used to retrieve data from Alma Analytics reports.

This can be with any other system by writing an app which runs the API which retrieves the Alma Analytics report and then using the retrieved data in an external system.

See for example the movie [Alma Analytics: Using an API to integrate Alma Analytics with the Tableau Web Data Connector](#) as well as the presentation [Analytics - Using Alma Analytics with the Tableau Web Data Connector.pptx](#) and the [Tableau Web Data Connector Ex Libris Developers Network Blog](#)

That's just one example of how an API can be used to integrate with another system (which in this case is Tableau).

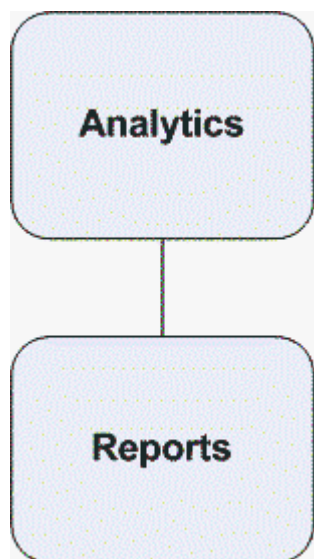
See also

[How to use an API to retrieve an Alma Analytics report in 5 easy steps](#)

[Alma Analytics APIs on the Developers Network](#)

Is an analytics API supported?

The Analytics API returns an Alma report (in XML format only). This [blog](#) provides additional information on how to determine your reports' paths and how to apply pagination or filters.



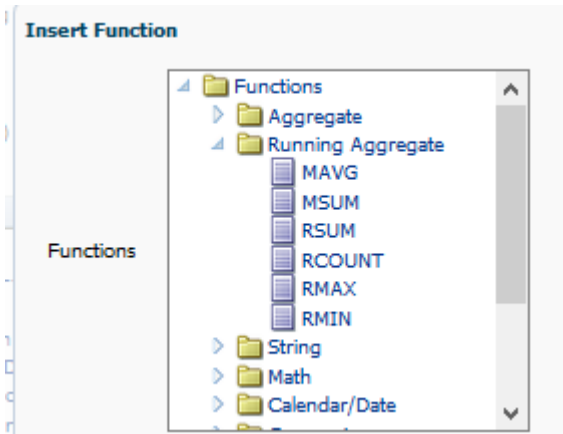
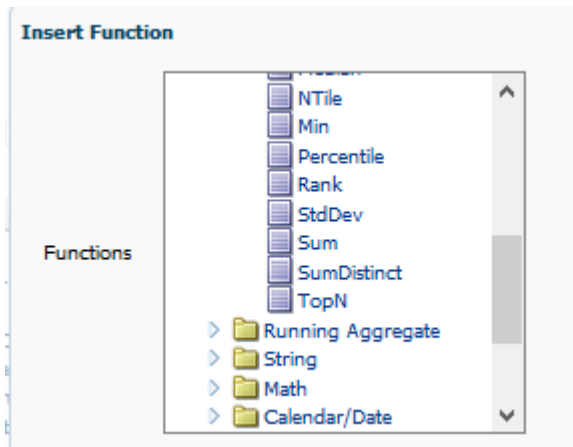
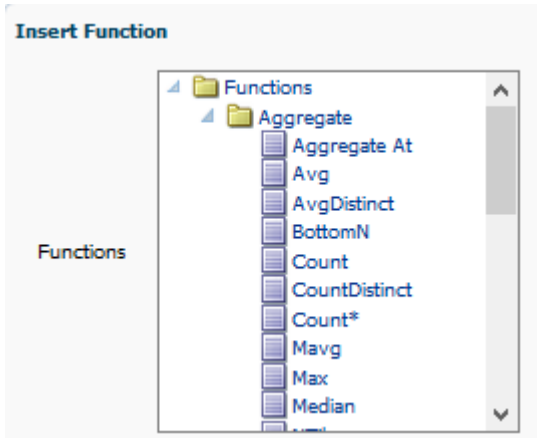
Since Alma Analytics reports can be very large, Alma supports retrieving it in several parts: The first retrieval will return a Resumption Token as part of the OBI report. This token should be used as a parameter instead of the path parameter for the next retrievals in order to get the next rows. See here for more details. <https://developers.exlibrisgroup.com...apis/analytics>

Report Creation

What domain aggregate functions does the solution support

Question: What domain aggregate functions does the solution support (e.g., sum, count, min, max, etc.)?

Answer: All aggregate functions supported by OBI are supported by Alma Analytics. See:



Are reports easy to create?

Creating a report is simple; after choosing the relevant subject area the staff user drags and drops relevant fields from the subject area on the left, to the right hand pane. Results can be viewed, and filters and other options can be applied in order to give the desired outcome. A graphic representation can be added, or chosen as the final report output.

Subject Areas

- Funds Expenditure
 - Fund Transactions
 - Transaction Amount
 - Transaction VAT
 - PO Line Quantity
 - PO Line Total Price
 - PO Line Pct
 - Invoice Line Quantity
 - Invoice Line Total Price
 - Invoice Line Pct
 - Fund Transaction Details
 - Periods
 - Fiscal Period
 - Library Unit
 - Library Description
 - Unit Type
 - Library Code

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Double click over the button next to its name.

Library Unit Vendor Fund Transactions

Library Name Vendor Name Transaction Amount

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column name in the catalog pane.

Subject Areas

- Funds Expenditure
 - Fund Transactions
 - Fund Transaction Details
 - Periods
 - Fiscal Period
 - Library Unit
 - Reporting Code
 - LC Classifications
 - Dewey Classifications
 - Fund Ledger
 - Vendor
 - Material Type
 - PO Line
 - Invoice Line
 - Bibliographic Details
 - Periods Outer

Compound Layout

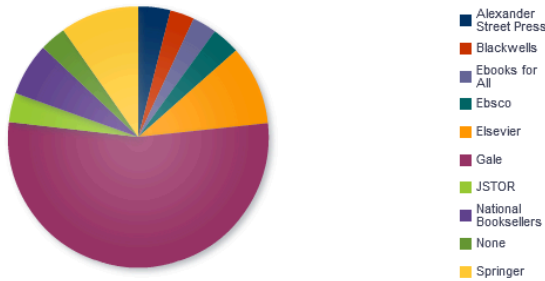
Title

Table

Library Name	Vendor Name	Transaction Amount
Art Library	Amazon	0
	Boardman	45
	Ebsco	100
Education Library	National Booksellers	228
	Boardman	50
	Ebrary	5
Law Library	National Booksellers	2
	Gale	5
	National Booksellers	15
Main Library	A D & L Vendors	34
	AAL Book Pedlars	70
	AIP - The American Institute of Physics	20
	Academic Books PG	55
	Alexander Street Press	8,650
	Amazon	0
American Society for Biochemistry and Molecular Biology (ASBMB)	1 600	

Graph (4)

Transaction Amount



Can the report output be sorted?

Alma Analytics provides sort mechanisms. You can directly sort columns ascending or descending:

Fine Fee Type	Library Name
Credit	Main Library
Lost item process fee	Main Library
Lost item replacement fee	Main Library
Overdue fine	Main Library
Overdue fine	Main Library
Overdue fine	Main Library
Recalled Overdue fine	Main Library

How can NULL values be reported?

Analytics allows for special treatment related to the case of NULL values across all fields, making sure that data is always displayed even when a specific data is missing. In the example given below all items that have no location information will be displayed under “unknown”/”none” category:

Location Name	Num of Items
Archives Office	400
Art Stacks	51,846
Cataloging Room	322
None	31,263

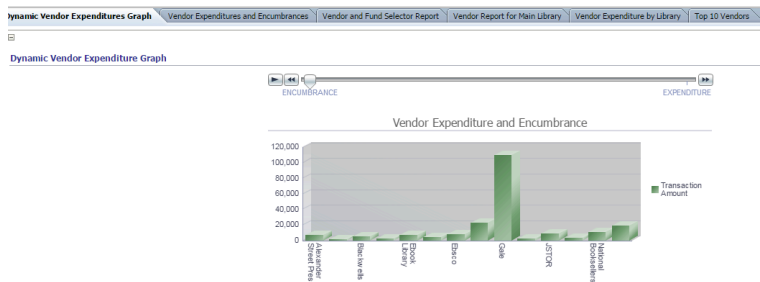
The following is an example of a report output that has been filtered to display items that have an ‘unknown’ item policy:

Compound Layout

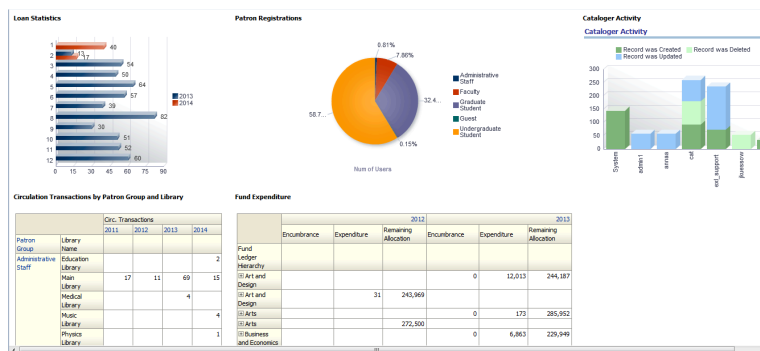
Title	Barcode	Material Type	Item Policy
"And whereas there is a very large sum of money due for wages and rations to the militia who were called forth upon the alarm in July last ... State of Rhode-Island and Providence Plantations. The preceding is a true extract form [sic] an act passed by the General Assembly, at November session, 1780.	B393628	Microfilm	Unknown
1900 to now : modern art from Rhode Island collections : an exhibition /	39031021511365	Book	Unknown
A Candid address, to the freemen of the state of Rhode-Island, on the subject of the approaching election. From a number of their fellow-citizens. The present most interesting crisis in the affairs of the United States.	B400254	Microfilm	Unknown
A Letter from sundry members belonging to a church of Jesus Christ, in Newport on Rhode-Island under the pastoral care of Timothy Padcom, to the several Baptist churches in New-England, that are, or have been, united in the general meetings usually held at Providence, Swansy, &c. In two parts.	B387012	Microfilm	Unknown
A Rhode Island chaplain in the Revolution; letters of Ebenezer David to Nicholas Brown, 1775-1778;	39031013586417	Book	Unknown
A Rhode Island original : Frances Harriet Whipple Green McDougall /	39031027212396	Book	Unknown
A Scriptural enquiry, concerning what the Friends call spiritual baptism; being an answer to a publication of a Friend in Rhode-Island, by the name of Moses Brown. /	B410975	Microfilm	Unknown
A Summary of the amount of the estimation of the colony of Rhode-Island, as taken by us the subscribers, pursuant to an act of the General Assembly of said colony, passed at their sessions in June, Anno Domini 1767.	B395127	Microfilm	Unknown
A Table to bring old tenor into lawful money, at twenty-three and one third for one, from six pence to ten thousand pounds. : To which is added, a table shewing the value and weight of gold and silver coins, &c. as stated by a law of the colony of Rhode-Island, &c. made and passed at a session of the General Assembly of said colony, held at Newport, the second	B395204	Microfilm	Unknown

Can a dashboard incorporating different report areas be generated?

Dashboards provide a useful tool for gathering a number of reports together for easy viewing. The dashboards can be tabbed so the user can navigate from one tab to the next in order to review report outputs. An example of a Vendor Expenditures dashboard can be seen following:



An example of a metrics dashboard with a variety of report outputs:



Is an audit trail generated on reports?

Each report is listed in its folder with a date stamp of the last modification stamp and the name of the owner. The name used may refer to the ID number of the staff member.

My Dashboard | Last Modified 7/9/2015 1:28:16 AM | Owner 964523950000121_121_D

Expand | Open | Edit | More ▾

Subject Area Contents | Last Modified 7/9/2015 1:28:16 AM | Owner System Account

Expand | More ▾

Can reports based on time stamps be generated?

Where appropriate date definitions are very flexible including date, day, month, week, quarter year and even time.

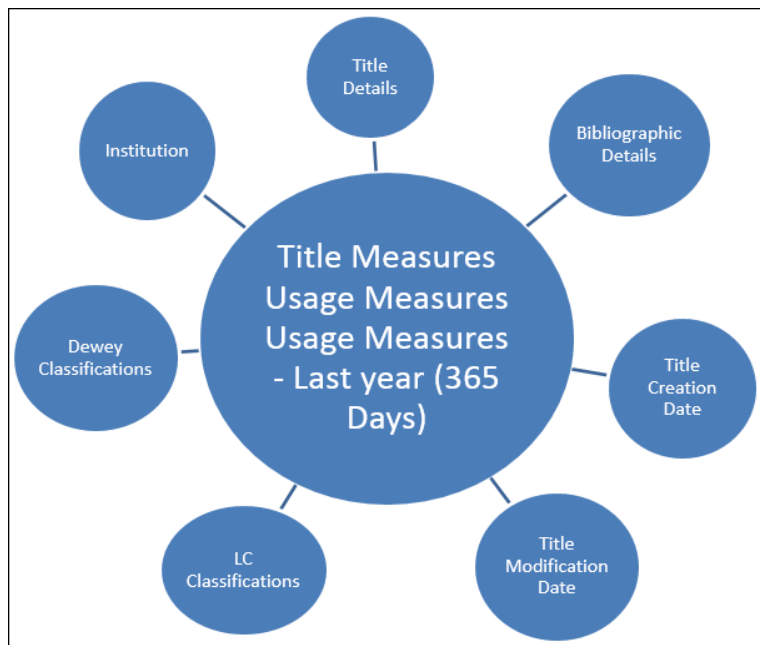
An example of this is the report below showing the number of loans by patron group within defined hour ranges.

User Group	loan hour: 08:00-10:00	loan hour: 10:00-12:00	loan hour: 12:00-14:00	loan hour: 14:00-16:00	loan hour after 16:00
Administrative Staff	1	8	7		2
Alumni	14	13	5		12
Distance Learners			2		
Faculty	2	3	2		7
Graduate Student		3	6		3
Guest	1		2		
Undergraduate Student	34	34	28		35
Walk In Loans - Network Members		1			

Can Alma generate reports on the level of the title?

The Titles subject area, allows the user to create reports/dashboards relating to Titles and answer the following types of business questions:

- What is the best way to link physical holdings with portfolios in order to get a good collection representation?
- What is the usage for specific bibliographic records in the library?
- How can I run a report at the title level that does not have physical items?
- Can event data be associated with bibliographic and holdings records or only with items?
- How can I report on new acquisitions?



An example of an overlap report (Physical and Electronic) created on journal titles:

Title (Normalized)	Author	MMS Id	Electronic Inventory	Physical Inventory	Summary Holding	Coverage Information Combined
african journal of library archives		99203882000121	3	0		Available from 1998; Available from 2006; Available from 2008; Available from 2008 until 2012
information science		99214573000121	0	37		
american journal of neuroendocrinology apr		9979711300121	1	1		Available from 1980
american journal of psychology		99143610100121	0	4		Available from 1887 volume: 1 issue: 1 until 1922 volume: 126 issue: 2; Available from 1982; Available from 1993; Available from 1993 until 2000; Available from 2009; Available from 1995 until 2001
		99192897000121	6	0		
australasian journal of early childhood		9969411200121	0	0		
		99175511200121	0	36		
		9926755000121	4	0		Available from 2009; Available from 2009 volume: 34 issue: 1
british journal of administrative management		9910679800121	2	0		Available from 2003
british journal of developmental psychology		9912713600121	0	6		
british journal of clinical psychology		9918641100121	9	0		Available from 1998 until 2006; Available from 1999 volume: 38 issue: 1; Available from 2001
	1 0000028	9911122000121	0	31		
british journal of developmental psychology		9911119800121	0	6		
		9919622000121	3	0		Available from 1999 volume: 17 issue: 1; Available from 2001
british journal of educational psychology		9911118900121	0	3		
		9913962900121	4	0		Available from 1999 volume: 80 issue: 1; Available from 2001
british journal of health psychology		9911117700121	0	8		
		9918654000121	4	0		Available from 1999 volume: 4 issue: 1; Available from 2001
british journal of mathematical and statistical psychology		9911306000121	0	10		
		9918639700121	4	0		Available from 1999 volume: 52 issue: 1; Available from 2001
british journal of psychology		9919294000121	13	0		Available from 1970; Available from 1975; Available from 1992 until 2007; Available from 1993 until 200
		9919294000121	13	0		Available from 1995 until 2006; Available from 1997 volume: 88 issue: 1; Available from 2003

An example of an overlap report (Physical and Electronic) created on words in the subject field:

Title (Normalized)	Author	MMS Id	Electronic Inventory	Physical Inventory	Subjects
atoms and alchemy chemistry and the experimental origins of the scientific revolution	Heisenberg, William Royal,	99444105000121	1	1	3 Science--History.; Science--Philosophy.; Alchemy--History.; Chemistry--History.; Electronic books.
biochemistry for dummies	Moore, John T.,	99255441000121	1	1	1 Biochemistry.; Electronic books.
	Moore, John T.,	99255440000121	1	0	0 Biochemistry.; Proteins.; Electronic books.
	1947-				
biochemica et biophysica acta		99146687000121	0	10	10 Biochemistry--Periodicals.; Biophysics--Periodicals.
		99166515000121	0	0	0 Biochemistry--Periodicals.; Biophysics--Periodicals.
		9975304800121	1	1	0 Biochemistry--Periodicals.; Biophysics--Periodicals.; Biochemistry.; Biophysics.; Periodicals.
cell culture		99105868200121	1	1	1 Cell culture.; Cells, Cultured--laboratory manuals; Electronic books; Cell culture; Cells; Anatomy & Physiology; Health & Biological Sciences; Cytology; Animal Biochemistry
dalton transactions an international journal of inorganic chemistry		9910189200121	1	1	0 Chemistry, Inorganic--Periodicals.; Chemistry, Physical and theoretical--Periodicals.; Chemistry theoretical.; Anorganische chemie.; Electronic journals.; Periodicals.
forensic chemistry		1 0000160	99112980000121	0	47 Chemistry, Inorganic--Periodicals.
organic chemistry made simple	Murthy, S. K., author,	9912105000121	1	1	1 Law; Chemistry
		9913271200121	1	1	1 Chemistry, Organic.; Electronic books.

Can SCONUL reports be generated?

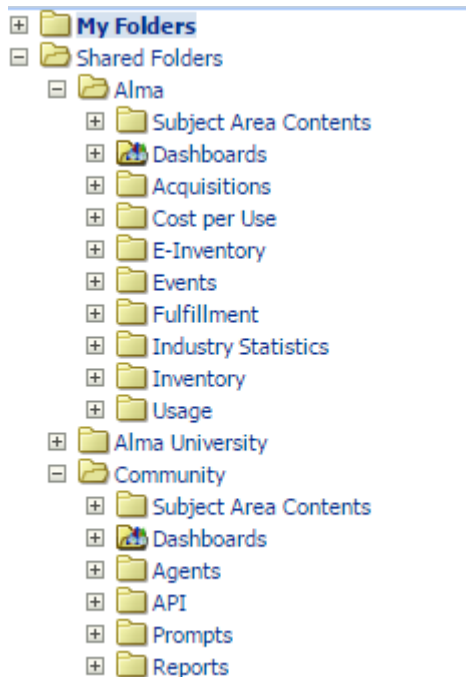
Alma's Analytics supports data required for a number of industry standard benchmarking reports such as SCONUL, ARL and CAUL. The reports, designed by Ex Libris and by participating institutions, are available to all Alma customers via the shared reports feature.

The Industry Statistics dashboard which contains sample reports may be useful if your institution needs to send reports to library organizations such as ARL and SCONUL. The dashboard contains the following reports:

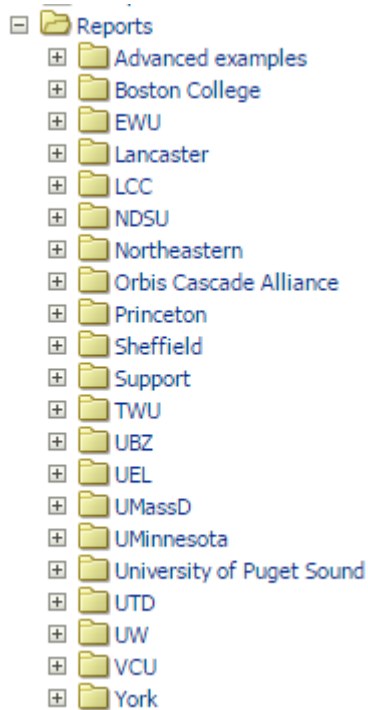
- Number of Objects
- Items Added, Items Withdrawal
- Item Count by library and Location
- Number of Loans and Renewals
- Inventory – Physical Inventory Count
- E-Inventory – Electronic Inventory Count
- Fulfillment – Annual Count of Loans and Renewals

Can customized reports be saved for reuse?

In addition to the institution folder (Alma University in the screen capture below), there is a Community area, that allows staff from all Alma institutions to post reporting options that can be shared by the entire Alma Community. An example of this can be seen in the following screen captures:



Community Reports:



Are failed reports logged with easily understood messages?

Alma Analytics supports logging of failed reports:



Error

View Display Error

Odbc driver returned an error (SQLExecDirectW).

[Error Details](#)

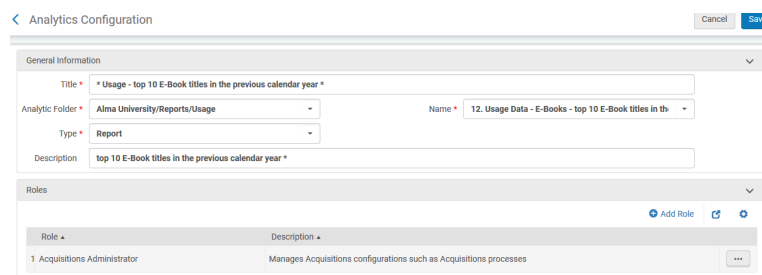
[Refresh](#)

Report Distribution, Dissemination

Is viewing reports in Alma role-based?

Viewing reports in Alma is role based - for example only staff users with acquisitions roles and privileges will be able to view acquisition reports. Defining reports, widgets or dashboards requires also defining the roles that can view these outputs.

The following screenshot is for a report, that only a user with roles "Acquisitions Administrator" can view.



How are reports disseminated?

Alma provides for the automated dissemination of reports on a scheduled basis. Library staff can schedule a report to run periodically; authorized staff may then subscribe to the report and receive the output in an email sent automatically based on the report schedule (e.g. daily, weekly, monthly).

Dashboards can be accessed by authorized staff from Alma.

Analytics Configuration

Title * Circulation Statistics

Analytic Folder * Alma University/Fulfillment Name * Cash Transactions

Type * Scheduled Report

Description Circulation Statistics

Format * PDF

Status * Active Inactive

Schedule * Every Monday at 03:00

Roles

Role	Description
1 Fulfillment Administrator	Manages Fulfillment related configurations such as policies, terms of use, Fulfillment Units and Circulation Desks

Staff users with roles linked to a report or dashboard, may choose the reports that he/she wishes to subscribe to. These will be emailed to subscribed staff at defined intervals.

Analytics Configuration and Subscription

1 - 20 of 22

Title	Description	Schedule	Status	Subscribe
1 All Items created in May 2016 and on scheduled excel	All Items	Every day at 03:00	✔	✔
2 All Items created in May 2016 and on scheduled text	All Items	Every day at 03:00	✔	✔
3 All Items scheduled excel	All Items	Every day at 03:00	✔	✔
4 All Items scheduled text	All Items	Every day at 03:00	✔	✔
5 Cataloger Activity	Cataloger Activity	On the 02 of every month at 03:00	✔	✔
6 CAUL Reports	-	On the 02 of every month at 03:00	✔	✔
7 Circulation Statistics	Circulation Statistics	Every Monday at 03:00	✔	✔
8 Count of Items Loaned by Patron Group	Count of Items Loaned by Patron Group	Every Monday at 03:00	✔	✔
9 E-Resource Usage	Reports of E-Resource Usage	On the 02 of every month at 03:00	✔	✔
10 Electronic titles in computer science with URL Link to Primo - New UI	Electronic titles in computer science with URL Link to Primo - New UI	Every day at 03:00	✔	✔
11 Expenditure by Classification - Scheduled	Breakdown of expenditure by LC Classification	On the 02 of every month at 03:00	✔	✔

The following is an example of a scheduled report sent to an email address:

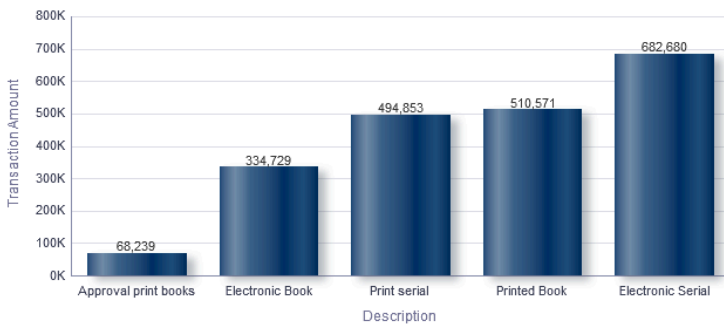


Can reports be exported in different formats?

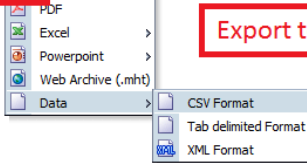
All reports are exportable in a variety of formats including: PDF, Excel, PowerPoint, mht, csv, tab delimited and xml.

See for example the two screenshots below which demonstrate this for both a graph and a table

Top five fund expenditures by POL reporting code for 2016

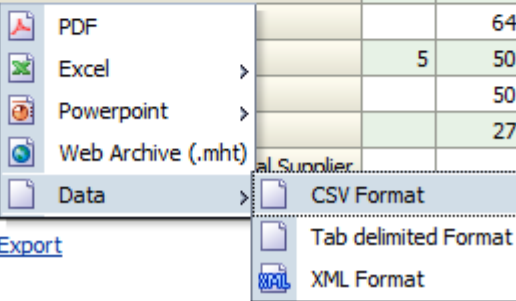


Edit - Refresh - Print - **Export** - Add to Briefing Book - Copy



Export to various formats

Vendor Name	Expenditures		
	2012	2013	2014
Grand Total	4,742	57,661	6,777
Springer		26,200	
Gale	500	21,419	2,781
Ebooks for All		6,261	
National Booksellers	2,280	2,199	1,524
Alexander Street Press		500	750
Elsevier	500	500	
Blackwells	445	380	
Ebsco			741
Swets Information Services			562
JSTOR	500		
A-R Editions Inc.			400
Houtschild International Booksellers	342		
Boardman	100		
AAL Book Pedlars	70		
YBP US		64	
Ebook Library		5	50
Karger			50
CYBO			27
International Lib			20
A D & L Vendors			



Refresh - Print - Export

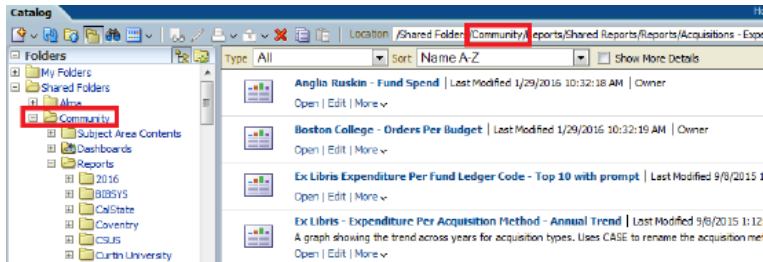
Report Sharing

What options are available for report sharing and collaboration?

Alma Analytics enables sharing of out-of-the-box reports created by Ex Libris. In addition, there is a Community area, that allows staff from all Alma institutions to post reporting options that can be shared by the whole Alma Community. The

"Community" folder is a read / write folder visible and accessible to save and copy for all institutions. It includes reports and dashboards made by and to be used by all institutions in the world. It contains only queries (no data of other institutions is visible).

An example of this can be seen in the following screen capture.



Alma Analytics Export General Comments

The purpose of Alma Analytics is for obtaining trends and statistics so that evidence based decision making can be made on library processes.

If the institution desires to export large amounts of data from Alma then there are multiple process to do so, and they should be used instead of Alma analytics.

For example:

- The general publishing profile allows the institution to export a set of bibliographic records which could theoretically contain the entire catalog and then continue to automatically run with incremental changes. This export can include all bibliographic fields as well as information of related inventory such as portfolios, electronic collections, physical items and digital objects. It can be run manually or scheduled to run on a regular basis and export to an ftp server.
- Users can be exported using the integration profile of type users. All users can be exported, or they can be exported according to various conditions.
- Fines and fees can be exported using the integration profile of type bursar. All fines and fees can be exported, or they can be exported according to various conditions.
- URLs of bibliographic records, electronic resources and digital titles can be done using the job "Export URLs"
- Physical items can be exported using the job 'Export physical items'
- Digital titles can be exported using the job "Export digital titles"
- Local authority records can be exported using the job "Export authority records"

There is a 10,000,000 line limit for exports of Alma Analytics reports in csv format. The limit is in place in order to ensure the efficient use of OBI with the multi-tenant cloud environment.

Total views:

11738

