Reports in Alma Analytics - Analytics Overview Module

This is the third section of the Analytics module to the Alma Overviews course. The video is at the top of the page, followed by the script.

In this video, you'll review:

- Opening Analytics
- Catalog
- Using a Shared Analysis
- Searching for existing analyses

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Opening Analytics

Reports available on the Analytics menu in Alma are only a subset of available analyses – there are many more in Analytics itself. In this last video, we’ll introduce the Analytics interface and show you how to find and run reports from within Analytics.

First, to get to the Analytics module, go to the Analytics menu in Alma and click on [Design Analytics]. The Analytics module will open in a new tab or window, depending on your browser settings.

Analytics opens to a blank Analytics Dashboard screen, with several menus across the top. Click on [Catalog] to open the set of folders where analyses are stored.

Catalog

At the top level, the Catalog has two folders: My Folders and Shared Folders.

**My Folders** is private. Only you can see the analyses in this folder, and it’s a good place to store reports you’re working on or that are only useful to you.

The **Shared Folders** area contains analyses available to everyone with a Design Analytics role. There are four main sub-folders: Ex Libris-created analyses in the **Alma** and **Leganto** folders; analyses created and shared by other Alma institutions in the **Community** folder; and Harvard-created analyses in the **Harvard University** folder.

To find Harvard-tailored analyses, look in the **Harvard University** folder. Many of these reports were created by the Analytics and Reporting Working Group at the request of other Alma working groups during the migration process. They were written to meet day one reporting needs and are designed to be useful to a broad set of Harvard staff.

In contrast, the analyses in the Alma folder – created by Ex Libris – address very broad information needs and often fail to run successfully because the Harvard data set is so large. Analytics and Reporting Working Group members reviewed all of the analyses in the Alma folder, and any that were useful have been adapted for Harvard use and saved in the Harvard University folder, so again, look there first.

Using a Shared Analysis

Sub-folders in the Harvard University shared folder are named for Analytics subject areas. **Subject area** is the term for the data sets available for analyses. Ex Libris has organized data that they extract from Alma into subject areas such as Fulfillment, Physical Items, E-Inventory, Requests, Funds Expenditure, and more. Analyses in the subject area sub-folders are written for shared use across Harvard, with multiple prompts, a well-formed title, and a full description with the name of the author and date.

Folders where the name begins with an underscore were created for other purposes. _Departmental Reports have analyses for use by a specific unit. _Collaboration is where you can copy an analysis if you want to work on it with someone else.

Searching for existing analyses

The best way to find an existing analysis is to search in the Harvard University folder.

1. Click on the [folder] so that the Location bar has the correct path
2. Click on the [binoculars icon] in the toolbar menu
3. Click in the [Search] box and type [loans]

The term is searched in title and description. In the search results list, look at the descriptions for more information about the analysis: if the ARWG guidelines have been followed, it will have a descriptive title, and information about prompts and data included in the output.
When you find an analysis that looks useful, click on the Open link. Open will bring up a prompt page, if there is one, or just run the analysis. Once you have output from the report, you have the options to Export or Print the results.

You may notice that you have the option to edit analyses in the shared Harvard University folder, but please do not do this — these are meant to be resources for all Harvard Library staff exactly the way they were constructed. If you take Creating Analytics training, you will learn how to copy a shared analysis to your personal folder to customize it to your needs.

Similarly, once you are in the Analytics module, you may see other possibilities for creating reports and other customizable options. If you’re interested in learning more, please look for further Analytics training.