Design Analytics Basics for ELUQ - Training Overview

Feel free to get in touch afterwards:

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This is a basic introduction to Alma Analytics, and some of the content might be a repeat for you if you have played around with the system before.

Part I: Accessing and Navigating Alma Analytics

library.georgetown.edu/alma -> Your institution's access point will be different

This is the Alma interface, which contains the Analytics Module. Your Alma administrator needs to give you access to Design Analytics Permissions before you will see the Analytics Module appear on the left side of the screen.

- Design Analytics permissions: It's what you need to create and share reports.
- Cannot limit access to a section of Alma Analytics. If you have access to Design Analytics, you have access to everything in Alma Analytics.
- Alma Analytics is updated overnight, so you are looking at data that is current as of yesterday. You can see the last updated note at the bottom of the Analytics button pop-out.

Quick overview of how Alma Analytics works on the back end

- Alma Analytics runs on a data warehouse
- Data are taken out of the Alma database on a regular schedule to update the alma analytics data warehouse
- Data go through a process of Denormalization: Data are aggregated in different ways to make running reports at various levels easier and faster. For example, you could have circulation or expenditures represented at the month or calendar year or fiscal year level and we don't need to write any queries to show us those data. The data are already prepared in those various ways within the data warehouse. Tables and logic are simpler because the designers of the data warehouse have already done some of the work for you. Queries should be faster because the work has been done before you run your report, but you have a one-day delay on the data availability.

Design Analytics

- Home - a list of recent and popular reports and dashboards
- Catalog - where saved reports live
- Favorites - your favorite things
- Dashboards - where dashboards live
- Create - create new report (aka "analysis")
- Open - to access reports

Building Reports - “Create -> Analysis”

- We say “report” but what we mean is “analysis”; ignore the report link on the drop down menu
- Need to select the subject area from which you want to build your report; these don’t correspond perfectly to modules in Alma, but you can find documentation for what the Subject Areas mean
- Subject areas contain “folders” - thematically organized data tables
- Within each folder is a list of fields; you can also search for fields (recommended!)
    - Measures are indicated with a yellow ruler and are aggregated at various levels; quantitative information
    - Dimensions are indicated with a blue stack and are sometimes called facts; qualitative information

Part 2: Overdue Items

- Select Create, then Analysis, then the Physical Items Subject Area
- Save your report with title such as “Overdue Items Report” in My Folder
- Add these fields as columns to your report:

    Location -> Library Name

    Physical Item Details -> Due Back Date

    Holding Details ->Permanent Call Number

    Bibliographic Details -> Title

    Physical Item Details ->Barcode

    Bibliographic Details -> MMS Id

- On Due Back Date, click the gear and select Filter; add filter for less than today’s date
- On Library Name, click the gear and select Filter; add filter for Lauinger Library
- On Criteria tab, under MMD Id, click the gear to edit the formula: COUNT(DISTINCT "Bibliographic Details"."MMS Id")
- On Results tab, click pencil icon on Table; under Layout, next to Columns and Measures click on the sigma and select “After” to add a total row
- Save your report (see icon at top right)

Part 3: Most Circulated Items

- Select Create, then Analysis, then the Physical Items Subject Area
- Save your report with title such as “Most Circulated Items Report” in My Folder
- Add these fields as columns to your report:
    - Location -> Library Name
    - Location -> Location Code
    - Physical Item Details -> Number of Loans (In House + Not In House)
    - Physical Item Details -> Last Loan Date
    - Holding Details -> Permanent Call Number

    - Bibliographic Details -> Title
    - Item Creation Date -> Item Creation Date
    - On Library Name, click the gear and select Filter; add filter for Lauinger Library
    - On Location Code, click the gear and select Filter; add filter for stx
    - On Item Creation Date, click the gear and select Filter; filter to less than 01/01/2000
    - Flip to Results, and sort by Number of Loan (down arrow for descending)
    - Save your report (see icon at top right)

Part 4: Funds Expenditures

- Select Create, then Analysis, then the Funds Expenditure Subject Area
- Save your report with title such as "Expenditures Report" in My Folder
- Add these fields as columns to your report:
    - Fund Ledger -> Fund Ledger Code
    - Fund Ledger -> Fund Ledger Name
    - Fund Ledger -> Fund Type
    - Fund Ledger -> Fund Ledger Status
    - Fund Ledger -> Fund Area Code
- On Fund Type, click the gear and select Filter; add filter to include only Allocated fund
- On Fund Ledger Status, click the gear and select Filter; add filter to include only ACTIVE
- On Fund Area Code, click the gear and select Filter; add filter to include only General, Endowed, and Grant
- Delete Fund Type, Fund Ledger Status, and Fund Area Code from the selected columns list; notice that their filters are unaffected
- Add three more fields as columns to your report:
    - Fund Transactions: Transaction Allocation Amount
    - Fund Transactions: Transaction Encumbrance Amount
    - Fund Transactions: Transaction Expenditure Amount
- Click the gear and select Column Properties for each of these three columns; adjust the data format to reflect currency settings
- Flip to the Results tab, and select the icon for New Calculated Measure from the toolbar
- Create two new calculated measures using these formulas:
    - *Money Available*: "Fund Transactions"."Transaction Allocation Amount" - ("Fund Transactions"."Transaction Expenditure Amount" + "Fund Transactions"."Transaction Encumbrance Amount")
    - Percentage Expended: ((("Fund Transactions"."Transaction Encumbrance Amount"+"Fund Transactions"."Transaction Expenditure Amount")/"Fund Transactions"."Transaction Allocation Amount")*100)
- Flip back to the Criteria tab to adjust the column properties for the calculated fields
- Save your report (see icon at top right)

Part 5: Shared Reports - "Catalog"

- When we "share" a report, it's just the structure of the report, not the data
- If you see something odd in your data and you want to share it with someone at this library, you can save a copy in your institution's shared folder

- Save reports in your folder, and then save a copy in a shared folder. Other people with access to the shared folder can modify reports and overwrite your copy. There's way to undo that.
- A word of caution: It's fairly easy to create inaccurate reports in Alma Analytics. It's a good idea to work with colleagues to swap notes about how you're pulling reports, and we recommend comparing your current year's data to previous years' data.
- When using consortium or community reports, remember that each Alma customer may have structured their data differently, and you may or may not get the desired results. It's best to work with local data experts for each subject area to confirm that your report is pulling the data that you want to see.

Sample Reports from this training can be found here:

Shared Folders > Community > Reports > Institutions > Georgetown