Creating sets in Alma from Alma Analytics Reports

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Introduction

How does it work?

First example

Second example
Introduction

• Now (as of May 2018) it is possible to create sets in Alma directly from Alma Analytics reports.
• This eliminates the process of exporting from analytics to Excel and then uploading Excel to Alma.
• Now directly from the "manage sets" page of Alma it is possible to choose an analytics report for the set creation.
Introduction

• This is particularly useful if the staff user wants to globally update a set of records in Alma and first retrieve these records in Alma analytics.
• Perhaps for example the staff user will want to

A. Retrieve a set of high loan items and globally change the item policy in Alma via the "Change physical items" job
B. Retrieve a set of electronic portfolios to automatically set availability status in Alma via the "Change electronic portfolio information" job
• In this manner the rich functionality of Alma Analytics retrievals can more easily be taken advantage of within Alma.
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How does it work?

1. Create the report in Alma analytics
2. In Alma access the "manage sets" page and add an itemized set
3. Fill in set details such as name, description, note and set content type
4. In the "Add contents from file to set" section choose radio button "From Analytics"
5. Choose relevant analytics folder and report
6. Save the set

- A job will be sent which creates the Alma set from the analytics report
How does it work?

• As is the case when creating an itemized set from a file, the Analytics report must contain a header with a valid field for creating the report.
• For example for a physical items set it must have the Item ID or barcode, and for a electronic portfolios set it can have the Portfolio ID.
• The full list is in the online help at https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets#Creating_Itemized_Sets
How does it work?

• The staff user in Alma who is creating the set can access the list of Alma Analytics reports as follows:
  • If he has role "Design Analytics" then he can access all reports
  • If he does not have role "Design Analytics" then he can access only these reports which are an analytics object of type "report" or "scheduled report" to which he has access.

• This will all become clear as we do the following two examples.
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First example

• User Sarah Safransky has, among other roles, "Fulfillment Services Operator".
• She does not have "Design Analytics"
First example

- In directory /shared/Alma University/Reports/Yoel there is a report "Items loaned more than 5 times in the last 30 days"
First example

- The report contains a column ‘barcode’
First example

• The report is a scheduled report accessible to users with role "Fulfillment Services Operator"

Note that it is not necessary for this to be active or scheduled
• Sarah Safransky does as follows:

1. Logs in to Alma
2. Accesses Admin > Manage Jobs and Sets > Manage Sets
3. Does Add Set > Itemized
4. Chooses set type physical items and "From Analytics"
This appears when choosing radio button "From Analytics"
First example

- Sarah can then choose in the Analytics folder either "My reports" or "Recent reports"
First example

- The "My reports" includes all reports to which she has access as an analytics object of type "report" or "scheduled report"
First example

- Now we will save the set

This will download the report as format csv so that the user can see it first if he so desires
First example

- A job is submitted for the set to be built

**Manage Sets**

Set "Items loaned more than 5 times in last 30 days" was successfully saved. A job was submitted to add members to the set.

<table>
<thead>
<tr>
<th>Job Category</th>
<th>Status</th>
<th>Submit Date Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>03/06/2018 - 03/07/2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Job ID</th>
<th>Job Category</th>
<th>Creator</th>
<th>Submit Date</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Add Members to Set</td>
<td>4725504...</td>
<td>Repository</td>
<td>SarahSG13</td>
<td>03/07/2018 09:15:58 MST</td>
<td>03/07/2018 09:15:58 MST</td>
<td>03/07/2018 09:15:58 MST</td>
<td>Completed Successfully</td>
</tr>
</tbody>
</table>
First example

- The set is created

Manage Sets

<table>
<thead>
<tr>
<th>Active</th>
<th>Name</th>
<th>Type</th>
<th>Content Type</th>
<th>Origin</th>
<th>Creation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Items loaned more than 5 times in last 30 days</td>
<td>Itemized</td>
<td>Physical items</td>
<td>Institution only</td>
<td>03/07/2018 09:03:55 MST</td>
</tr>
</tbody>
</table>
First example

- It contains the same items which were in the analytics report
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How does it work?

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Second example

• Now user Aaron Archionsky will create a set in Alma from an Alma Analytics report.
• He does have the role "design analytics’
• The functionality will be the same as was the case the Sarah Safransky except that
  1. There is no need to create an Analytics object of type report
  2. Aaron will be able to see all analytics reports when creating the set and this is due to the fact that he has the "design analytics" role.
Second example

• In directory /shared/Alma University/Reports/Yoel there is a report "Portfolios to deactivate"
Second example

- Here is the report. It includes Portfolio ID:
Second example

• Now we do not need to make an analytics object because this user has role "design analytics" so he can access this and all other reports.

• Like Sara Safransky he does as follows:

1. Logs in to Alma
2. Accesses Admin > Manage Jobs and Sets > Manage Sets
3. Does Add Set > Itemized

• Aaron chooses set content type "Electronic Portfolios" and "From Analytics"
Second example

<table>
<thead>
<tr>
<th>Set name</th>
<th>Portfolios to deactivate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Portfolios to deactivate</td>
</tr>
<tr>
<td>Note</td>
<td></td>
</tr>
<tr>
<td>Set content type</td>
<td><strong>Electronic portfolios</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Private</td>
<td>Yes</td>
</tr>
<tr>
<td>Creation date</td>
<td>03/07/2018 10:04:44 MST</td>
</tr>
<tr>
<td>Updated by</td>
<td>Ex Libris</td>
</tr>
<tr>
<td>Set type</td>
<td>Itemized</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Created by</td>
<td>Ex Libris</td>
</tr>
<tr>
<td>Content Origin</td>
<td>Institution only</td>
</tr>
<tr>
<td>Set ID</td>
<td>-</td>
</tr>
</tbody>
</table>

**Add Contents from File to Set**

- From File
- From Analytics

Analytic Folder | Recent reports
Name            | Portfolios to deactivate

Download report
Second example

• Because Aaron has design analytics role he can choose any report from any folder. He can access the same as he can access when he does ‘design analytics’
Second example

• He chooses the desired folder and report and clicks "Save".
• He can also choose folder "Recent reports" and this will include anything he ran in the last hour from ‘Design analytics’
Second example

- As with Sarah the job is submitted and the set is created.
Second example

- The Alma set contains the same records as the Analytics report
Thank You
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