Introduction to Analytics

Technical Seminar

2014

Montreal
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Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject Area</td>
<td>Data in Alma Analytics that is organized into subject areas or data marts such as Funds Expenditure, Fulfillment, Users, Fines and Fees as well as Physical Items</td>
</tr>
<tr>
<td>Fact Table</td>
<td>Consists of the measurements, metrics, or facts related to a business process and contains the core part of the subject area</td>
</tr>
<tr>
<td>Dimension</td>
<td>Tables that contain descriptive attributes (or fields) that are typically textual fields or discrete numbers behaving like text dimension attributes such as Library Code, Vendor Name, or Loan Date give facts a context</td>
</tr>
<tr>
<td>Measure Column</td>
<td>Similar to a column of data in a table that holds a simple list of data values which can change or may be counted or aggregated in some way</td>
</tr>
<tr>
<td>Attribute Column</td>
<td>Similar to a column in a table which holds a simple list of members that function as attributes</td>
</tr>
<tr>
<td>Hierarchical Column</td>
<td>Holds a list which shows individual members in an outline manner with lower-level members rolling into higher-level members and outline totals being shown for the higher-level members</td>
</tr>
<tr>
<td>Is Prompted</td>
<td>Valid for a column containing text, numbers, or dates and is used to include only those records in the column where no pre-filtered values are desired</td>
</tr>
<tr>
<td>Prompt User</td>
<td>Valid for a column that contains text, numbers, or dates and is used to enable a user to select the dashboard or analysis' prompt operator when running the analysis</td>
</tr>
</tbody>
</table>

Requirements

Users responsible for designing and publishing analytics reports must have the View and Design Analytics role assigned. Once the role is assigned, the Analytics section appears in the Administration column of the Alma menu with three links:

1. **Design Analytics** which enables the user to create reports and dashboards
2. **Configuration Menu** which enables the user to share the created reports and dashboards with other Alma users
3. **Subscribe to Analytics** which allows users to subscribe to Analytics reports and dashboards that have been created by an Analytics Designer
Starting Analytics

**Goals of this exercise:**

- start Alma Analytics
- navigate around

1. To start Alma Analytics, go to the Alma menu and select the **Design Analytics** link under the **Administration** column heading.

2. When Alma Analytics first opens (it will open in a new tab), the **My Dashboard** pane appears and has no content. We are given a way to change what appears here, but let’s leave that for later.

3. Take a look at the text menu bar located in the upper portion of the screen, starting at about the mid-point.

4. Click on the drop-down for **Search** to see the many types of searches that may be performed. Click on the **Advanced** link in the upper right corner to be taken to an **Advanced** search page. Using either of these search options will likely become useful over time.

5. Now, click on the **Home** link to be taken to the Home page of Analytics. Note the **Left Pane** with the sections for **Create**, **Browse/Manage…**, and **Get Started** as well as the **Right Pane** with **Recent** and **Most Popular** dashboards and/or analyses.

6. Click on the **Catalog** link to be taken to the area where there are a number of **Canned Reports** and other options. More on this shortly.

7. Click on the **New** link to open a menu that provides one of the starting points for a new analysis along with a number of other options that are similar to what displays in the Create section in the **Left Pane**.

8. Click on the **Open** link to view a list of **Recent** and **Most Popular** dashboards and/or analyses from which to make a selection.
# Canned Reports

## Goals of this exercise:
- navigate to where canned reports are located
- run canned reports
- edit canned reports
- modify filters
- save edited reports for local use
- navigate to where edited reports are now stored

### Running/Viewing Canned Reports

1. Return to the **Catalog** link to review the format of the Catalog and to see what is available for Canned Reports.

2. In the **Folders** pane on the left, click on the + to the left of **Shared Folders** and on the + to the left of **Alma**. At this stage in the navigation, we see sub-folders that include **Acquisitions**, **Events**, **Fulfillment** and **Inventory**.

3. Click on the + to the left of **Fulfillment** to open this sub-folder before selecting the **Reports** folder to display the group of Canned Reports that is available for use. Take a moment to review the list of Canned Reports for **Fulfillment** noting the options to **Open**, **Edit** and **More**.

### Viewing/Editing Canned Reports for Fulfillment

1. Return to the **Reports** folder for **Fulfillment** and click on the **Open** link for the analysis, **Count of Items Loaned**. The first thing that we see is a grid displaying results for numerous years and for all libraries and all locations.

2. Consider that we might not want to view historical data for all libraries and locations, rather for one location only. To apply this constraint, we need to edit the criteria for the analysis to retrieve the modified results. Click on the **Edit** link at the bottom of the report to open the analysis in the editing window.

3. The analysis actually opens in the **Results** view, so the first step is to click on the **Criteria** tab (towards the top-left) to be taken to the pane where the criteria may be edited.
4. In the **Selected Columns** pane, you’ll see the criteria being used to create the analysis. What we’re more interested in, however, is the **Filters** pane.

5. In the upper right corner of the **Filters** pane, click on the **filter icon** to create and add a new filter. From the list that appears, select “**Location**:Location Name” to open the **New Filter** window.

6. Leave the **Operator** as *is equal to / is in*. From the **Value** drop-down, select a location of your choosing before clicking on the **OK** button to apply the change and be returned to the **Criteria** tab. Notice the change to the **Filters** pane in that it now includes a filter for location. Click on the **Results** tab in the upper-left to view the changed results.

7. Now that we have edited this analysis, we need to save it locally. In the upper right corner, below the signed-in user’s name, you’ll see two icons for **Save** and **Save As**. Click on the **Save As** icon to be taken to the **Save As** window where we want to navigate to **My Folders—Subject Area Contents**. Once there, prepend your initials to name of the analysis (e.g. CLB Count of Items Loaned for Location X) and click on the **OK** button to save the edited report. Navigate to **Catalog-My Folders—Subject Area Contents** to see that the report is available for you as the signed-in user.

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### Viewing/Editing Canned Reports for Acquisitions

1. Let’s go on to take a look at the Canned Reports that are available for the **Acquisitions** subject area.

2. Navigate to the **Reports for Acquisitions** (Navigation Path: Catalog > Shared Reports > Alma > Acquisitions > Reports) and click on the **Open** link for **Expenditure Per Vendor**. When the results display, click on the **Edit** link at the bottom of the report. Then click on the **Criteria** tab to make a change to how this information displays.

3. In the **Selected Columns** pane, hover over the *down-arrow associated with Vendor Name* and select **SORT—SORT ASCENDING**.

4. Next, still in the **Criteria** tab, modify the **Expenditures Filter** (in the Filters area, hover-over ‘Expenditures is greater than’ and click on the pencil icon) and change the value from “1” to “20”. Click on the **Results** tab to see the updated results. Since we have edited this analysis, save it locally using the process you have already performed.
**Viewing/Editing Canned Reports for Inventory**

1. Take a look at the **Canned Reports** that are available for the **Inventory** subject area.

2. Navigate to the **Reports for Inventory** and click on the **Open** link for **Detailed Item Count by Library and Location**. When the results display, click on the **Edit** link (you may need to scroll down to see it) and **Criteria** tab to make a change to how this information displays.

3. In the **Selected Columns** pane, place your mouse pointer over the cell containing **Call Number**. You should see a four-headed arrow appear which enables drag-and-drop functions. Click on the **Call Number** cell to pick up the cell and move it to the left-most position. Sort the list by Call Number in ascending order. Click on the **Results** tab to view the change to the display.

4. Take five minutes to explore the other **Canned Reports** available for **Inventory**. (Navigation Path: Catalog > Shared Folders > Alma > Inventory > Reports) If you edit any, save them locally.

**Viewing/Editing Canned Reports for Cost per Use**

1. Take a look at the **Canned Reports** that are available for the **Cost per Use** subject area.

2. Data in this subject area is collected via Primo’s association with Alma as the discovery layer. The data collected here will depend on active use of Primo by patrons at your institutions.

3. Assuming that you have been harvesting data and loading it into UStat, Analytics will retrieve anything that is available here.

**Viewing/Editing Canned Reports for Usage**

1. Take a look at the **Canned Reports** that are available for the **Usage** subject area.

2. Usage data is collected via Primo’s association with Alma as the discovery layer. To see data populated in this subject area, Primo will need to be actively used by patrons at your institutions.

3. Assuming that you have been harvesting data and loading it into UStat, Analytics will retrieve anything that is available here.
Creating New Analytics Reports

**Goals of these exercises:**
- create simple and more complex analyses
- viewing the results
- change column heading labels
- add one or more filters
- format and add sums
- understand operators and values in filters
- saving analyses for later use

<table>
<thead>
<tr>
<th>measures column</th>
<th>attribute column</th>
<th>hierarchical column</th>
</tr>
</thead>
</table>

**Items on Loan to Users**

1. To start a new analysis, click on the *down arrow* next to *New* in the toolbar above the **Compound Layout** pane, and select **Analysis**. From the **Subject Areas** list that appears, select **Fulfillment**.

2. Within the Fulfillment subject area, in the Criteria tab open the **Loan Circulation Desk** folder. Double-click on the column for **Library Name** to add it to the **Selected Columns** pane. Add **Circ Desk Name**, this time by selecting it and performing a drag-n-drop to the **Selected Columns** pane. Because both columns come from the same cluster, a single header name displays. Close the **Loan Circulation Desk** folder.

3. Add **Date Key** from **Loan Date**, **Title** from **Bibliographic Details** and **Last Name** from **User Details** closing each folder as you proceed. Click on the **Results** tab to view the results of our analysis thus far in the **Compound Layout** pane.

4. Before going any further, we need to save the analysis. To do so, click on the **Save Analysis** button located in the upper right corner above the **Compound Layout** pane and navigate to **My Folders—Subject Area Contents** before naming the analysis `<your initials> Count of Items Loaned` (e.g. CLB Count of Items Loaned). You may add a new subfolder in which to store the various analyses you create.

5. Return to the **Criteria** tab to add **First Name** to the analysis as well as changing the sort for **Last Name** to ascending order and view the updated Results. Click on the **Pencil** icon in the upper right corner of the **Table** portion of the **Compound Layout** pane to edit the view. Doing this opens the **Layout** sub-pane.
6. Scroll down to locate the Excluded row. Click on First Name to drag and drop the column into position immediately right of Last Name in the Columns and Measures area of the Layout sub-pane. As we have adjusted the display in the Compound Layout pane, we have the option to revert or complete the change. Click on the Done button to complete the change. Save the analysis again to finish this exercise.

Print Items Ordered, Not Received

1. Start a new analysis by clicking on the down arrow next to New in the toolbar above the Compound Layout pane, and select Analysis. From the Subject Areas list that appears, select Funds Expenditure.

2. While in the Criteria tab, add the following columns to the Selected Columns pane:
   - Library Name (from Library Unit)
   - PO Line Reference (from PO Line)
   - Title (from Bibliographic Details)
   - Status (from PO Line)

3. Before viewing the results, sort the titles in ascending order. To do this, hover over the down arrow for the Titles column, select Sort and choose, Sort Ascending. Now, review the results by clicking on the Results tab noting the Library Name and Status columns. Scroll to the bottom of the first page and click on the down arrow to go to the next page or click the option to view all rows (i.e., displays maximum of 500 rows per page.)

4. Save the analysis to My Folders—Subject Area Contents, naming it <your initials> Print Items Ordered Not Received.

5. Return to the Criteria tab to apply a filter so that the results will display only those items that remain on order.

6. Click on the Filter icon located in the upper right corner of the Filters pane. From the list that appears, select "PO Line"."Status". The New Filter window opens.

7. Leave the Operator as is. Click on the down arrow for Value to see options for ACTIVE, CANCELLED, and CLOSED. Select the ACTIVE status by clicking in the check box to the left. Click on OK to apply the filter to the analysis.

8. View the results, noting that we are seeing only those PO Lines with the status of ACTIVE.
**Count of Physical Items Added by Creator with Date Range**

1. For this new analysis, click New > Analysis and choose the Subject Area for **Physical Items**. Add the following columns to the **Selected Columns** pane:
   - *Creator* (from Physical Item Details)
   - *Number of Items* (from Physical Item Details)

2. View the results and save the analysis to **My Folders—Subject Area Contents**, naming it *<your initials> Count of Physical Items Added by Creator with Date Range*.

3. Return to the **Criteria** tab to apply an ascending sort to **Creator** so that each column is grouped by Creator (i.e., **Operator**). View the results.

4. Because we want to see a count of physical items added by date range, return to the **Criteria** tab to add the **Creation Date** column (from Physical Items Details) to the **Selected Columns** pane. Before applying a filter for date range, view the results.

5. Click on the **Pencil** icon in the upper right corner of the **Table** portion of the **Compound Layout** pane to edit the view with the Layout sub-pane.

6. Scroll down to locate the **Excluded** row. Click on **Creation Date** to drag and drop the column into position immediately right of **Num of Items** in the Columns and Measures area of the Layout sub-pane. As we have adjusted the display in the **Compound Layout** pane, click the **Done** button to complete the change.

7. Return to the **Criteria** tab to apply a filter for **Creation Date**, start by selecting **IS BETWEEN** as the **Operator**. Open the drop-down for the first **Value** to identify the first date in the range. Do this by scrolling to your preferred date or clicking on the calendar icon to select a date such as "5/3/2012" and click on **OK** to insert the first date into the filter. Open the drop-down for the second **Value** to enter the second date, such as, "7/4/2012", in the range. Click on **OK** to insert the second date in the range into the filter. Click on **OK** in the New Filter window to apply the filter.

8. View the results. If you made any other changes to the analysis, save it again.

9. As we are now looking for a total count of physical items added by creator, let’s hide the exact date on which each physical item was added to Alma. To do this, from the Results tab, edit the **Layout** view by clicking on the **Pencil** icon. Then, drag **Creation Date**
### Number of Loans over Time by Classification Code/Range

1. For this analysis, add the following columns to the **Selected Columns** pane from the **Fulfillment** subject area:
   - *Location* – hierarchical column (from Location)
   - *Classification Code* (from LC Classifications)
   - *Year Key* (from Loan Date)
   - *Loans* (from Loan)

2. View the results, noting the option to open each Location.

3. Save the analysis to **My Folders—Subject Area Contents**, naming it `<your initials>` **Number of Loans Over Time by Classification Code and Range**.

4. Return to the **Criteria** tab to add
   - *Classifications* – hierarchical column (from LC Classifications)

   to the Selected Columns. View the results again. Is the **Classifications** column displaying? If so, proceed to the next step. If not, we’ll need to add it.

   To add the new column, click on the **Pencil** icon in the upper right corner of the **Pivot Table** to open the **Layout** pane. Scroll down until you see the **Excluded** row containing the **Classifications** column. Drag and drop the **Classifications** column into position next to **Classification Code** in the **Rows** row. The display above updates automatically to show the textual details. Click **Done**.

5. Return to the **Criteria** tab to add a filter that will apply a range of classification codes. Click on the **Filter** icon located in the

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Note: Notice the ability to open each Classification area into sub areas.
upper right corner of the Filters pane. From the list that appears, select "LC Classifications"."Classification Code" to open the New Filter window. From the drop-down Operator, select IS BETWEEN. Open the drop-down for the first Value to identify the start of the range (DD, for example). Open the drop-down for the second Value to identify the end of the range (GV, for example). Click on the OK button to apply the filter to the analysis.

6. Click on the Results tab to see the changed results based on the addition of the filter. If desired, return to the Criteria tab to modify the filter before viewing the results again.

### Average Days on Loan

1. For this new analysis, add the following columns to the Selected Columns pane from the Fulfillment subject area:
   - Library Name (from Location)
   - Loans and Loan Days (from Loan)
   - Date Key (from Loan Date)

2. View the results and save the analysis to My Folders—Subject Area Contents, naming it <your initials> Average Days on Loan.

3. Return to the Criteria tab to add another instance of the Loans column of data. Use the drag-n-drop option to place the column on the far right of all columns.

4. For this second instance of the Loans column, place your mouse pointer over the drop-down. Select Edit formula to open the Edit Column Formula window.

5. Remove the existing column formula.

6. From the Subject Areas pane on the left, open the Loan folder and select Loan Days before clicking on the arrow to push this field into the Column Formula pane. Insert the mathematical operator, \( / \) (leaving a space on either side), immediately following Loan Days. Return to the Subject Areas pane to select Loans field and click on the arrow to put it in place to the right of the mathematical operator.

7. Click on the OK button to return to the Selected Columns pane. You'll see the name-change of the column for which we have been editing the formula.

8. From the drop-down for the Loan Days / Loans column, select
### Column Properties

so that we can edit the Data Format to include two decimal places.

9. Select the **Data Format** tab in the **Column Properties** window that has opened. Place a check in the box for **Override Default Data Format** and change the value for **Decimal Places** to 2. Click **OK**.

10. Click on the Results tab to view the changes. Note that you will likely need to edit the view of the results (i.e., click on the pencil icon) to move the **Loan Days / Loans** column from the **Excluded** area to the **Columns and Measures** area.

11. Save the analysis once again.

### What Other Analyses Do You Wish to Create?

Here are some ideas:

1. How many items were loaned, returned, or lost per library?
2. How many items were loaned between specific loan dates?
3. How many items were loaned from a particular circulation desk?
4. What is the due-date policy of the loaned items?
5. How many items were loaned per classification?
6. List of all the user’s cash transactions.
7. List of all the open cash transactions by patron group.
8. List of users that have fines and fees with their preferred address, phone, and email information.
9. List of all the transaction types and amounts per library.
10. How many physical items exist per Library/Location?
11. List of all the titles based on their process type.
12. Number of Physical Items per material type.
13. How many times each item was loaned?
14. What is the last date that a specific item was loaned?
<table>
<thead>
<tr>
<th></th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>How many resource-sharing borrowing requests were made? completed? rejected?</td>
</tr>
<tr>
<td>16</td>
<td>Which resource-sharing partner receives the greatest number of requests from us?</td>
</tr>
<tr>
<td>17</td>
<td>Which user-type makes the most resource-sharing borrowing requests?</td>
</tr>
<tr>
<td>18</td>
<td>How many resource-sharing lending requests were made? completed? rejected?</td>
</tr>
<tr>
<td>19</td>
<td>Which resource-sharing partner makes the greatest number of requests from us?</td>
</tr>
<tr>
<td>20</td>
<td>Which user-type makes the most resource-sharing lending requests?</td>
</tr>
<tr>
<td>21</td>
<td>How long between requesting items and receiving them?</td>
</tr>
<tr>
<td>22</td>
<td>How long between items being requested and sending them?</td>
</tr>
<tr>
<td>23</td>
<td>How much was expended last year per month?</td>
</tr>
<tr>
<td>24</td>
<td>What is the comparison of encumbrances versus expenditures versus allocations?</td>
</tr>
<tr>
<td>25</td>
<td>How much was expended per item material type or per item type?</td>
</tr>
<tr>
<td>26</td>
<td>What is the share of E/P expenditures out of the total expenditures?</td>
</tr>
<tr>
<td>27</td>
<td>How much was paid per vendor?</td>
</tr>
<tr>
<td>28</td>
<td>How much was expended per reporting code?</td>
</tr>
<tr>
<td>29</td>
<td>How much was expended per fund, ledger, or library out of the allocations?</td>
</tr>
<tr>
<td>30</td>
<td>How much was expended per library?</td>
</tr>
</tbody>
</table>
# Adding Another View to an Analysis

## Goals of this exercise:

- retrieve and work with an existing analysis
- add a graph to the analysis

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by opening the analysis for <strong>Physical Items Added by Operator with Date Range and Count</strong>, created earlier in this training, in Edit mode and go to the <strong>Results</strong> tab.</td>
</tr>
<tr>
<td>2.</td>
<td>Click on the down arrow for the <strong>New View</strong> icon. From the menus that appear, select <strong>Graph &gt; Bar &gt; Default (Vertical)</strong>. You'll see the Graph view display below the Table view.</td>
</tr>
<tr>
<td>3.</td>
<td>Remove the views for both Title and Table from the <strong>Compound Layout</strong> by clicking on the red X and clicking on the Save As icon to give the analysis a slightly different name, something like <code>&lt;your initials&gt; Physical items Added by Operator with Date Range and Count – 3D Bar Graph</code>.</td>
</tr>
<tr>
<td>4.</td>
<td>To enhance the appearance of the graph, click the <strong>Pencil</strong> icon to begin making changes to the format. Click on the <strong>Edit Graph Properties</strong> icon (shown to the left), to open the Graph properties dialog box.</td>
</tr>
<tr>
<td>5.</td>
<td>Select <strong>Left</strong> for the Legend Location and <strong>Enable for Horizontal Axis</strong> from the Zoom and Scroll check boxes.</td>
</tr>
<tr>
<td>6.</td>
<td>Click on the <strong>Style</strong> tab. Choose <strong>Gradient</strong> from the <strong>Style</strong> dropdown and place a check in the box for 3D. From the <strong>Background</strong> drop-down, select a light background color from the Color Selector and click on the <strong>OK</strong> button. Click the radio button for <strong>Specify Gridlines</strong> and place a check in the box for <strong>Horizontal Lines</strong> for <strong>Major Grid</strong>. Pick a dark color and click on the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>7.</td>
<td>Click on the <strong>Scale</strong> tab to set what you will see on the graph. Make any changes you wish.</td>
</tr>
<tr>
<td>8.</td>
<td>Click on the <strong>Titles and Labels</strong> tab. Clear the check box for <strong>use measure name</strong> and enter <strong>Physical Items Added by Creator with Date Range and Count</strong> in the text box for <strong>Title</strong>. You may modify the font format for the <strong>Title</strong> if you wish.</td>
</tr>
<tr>
<td>9.</td>
<td>Click on the <strong>Font</strong> icon adjacent to <strong>Horizontal Axis Labels</strong> and change the <strong>Label Orientation degrees</strong> to <strong>60</strong> and click on the <strong>OK</strong> button. Clear the check box for the <strong>Vertical Axis Title</strong> and click on the <strong>OK</strong> button to close the Graph Properties window.</td>
</tr>
</tbody>
</table>
10. View the results before exporting the analysis to PDF so that you may save the graph for external viewing.

11. Save this final version of the analysis.

12. Create graphs for some of the other analyses that we have created or are available via the Catalog.

Exposing Results of Analyses to Other Users

Goals of this exercise:

- add a widget to display information to specific users

1. At the Alma menu, click on Configuration Menu under Analytics to display the Analytics Objects List. Click on the Analytics Objects List link to open the Mapping Rows Table page.

2. Click on the Add New Analytics Object button to add make a new widget available.
   a. Enter a name of your choosing such as, Acquisitions – Detailed Expenditures
   b. In the Analytic Folder drop-down, select Alma/Acquisitions/Reports
   c. In the Type drop-down, select Widget
   d. In the Name drop-down, select Detailed Expenditures
   e. Frequency does not apply in this case
   f. Add a more detail description if you wish

3. Click on Add Role button to indicate which roles should be able to view this Analytics Object.

4. Return to the Alma Home page (assuming that you have appropriate role) and click on the Add Widget button, located in the upper right corner of the home screen, to open the list of available widgets. To activate the Acquisitions – Details Expenditures widget, click on the check mark to left of entry in the list. The check mark turns yellow when active.

5. Add at least one more widget, this time for a different user role.

Resources
The resource named below is available via the Ex Libris Documentation Center:

*Alma Analytics Guide*

This item is continuing to be updated, so you will want to return to the Ex Libris Documentation Center every month to ensure that you have the most up-to-date version of this guide.

**Forthcoming Subject Area Additions to Analytics**

Requests

Electronic Portfolios/Collections

Courses and Reading Lists (link to Inventory)

Vendors/Accounts

Ledgers/Funds

POs/POLines

Invoices/InvoiceLines