ELUNA 2018

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Spokane, WA

Creating sets in Alma from Alma Analytics Reports

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1. Introduction
2. How does it work?
3. First example
4. Second example

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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.

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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

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Introduction

- 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

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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

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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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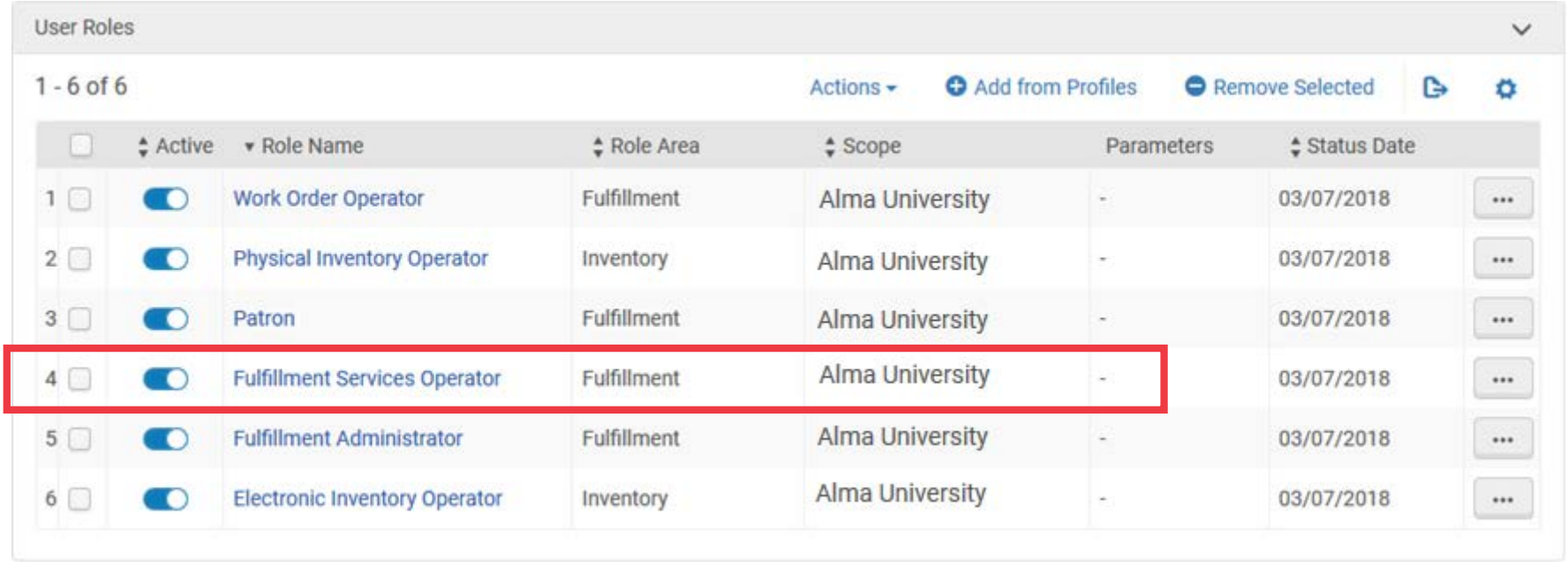
First example

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



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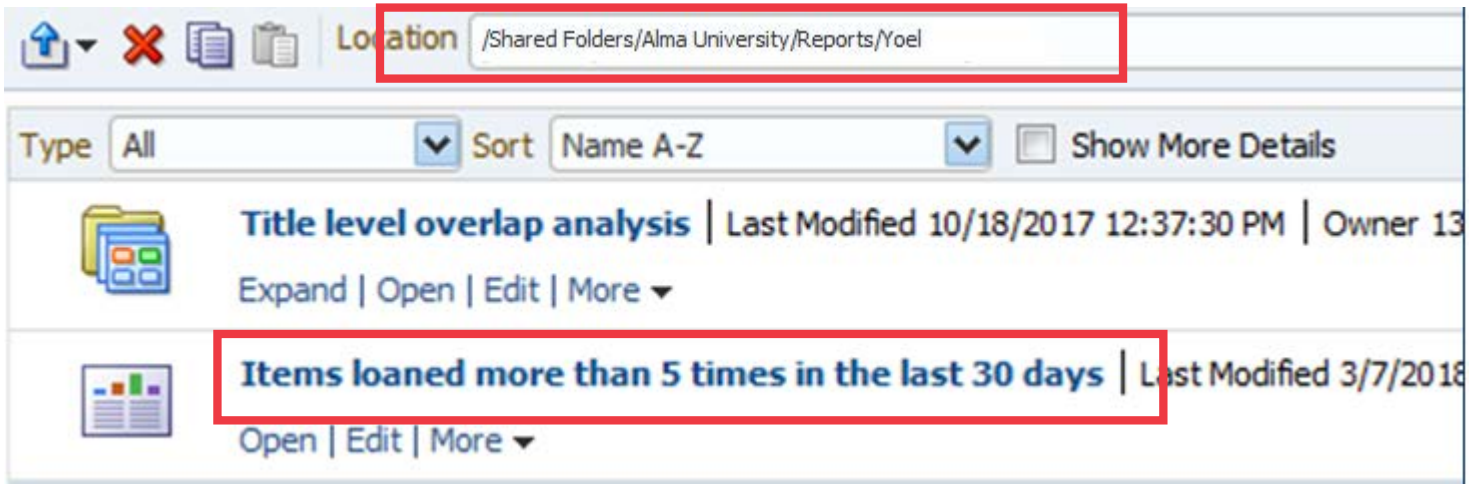
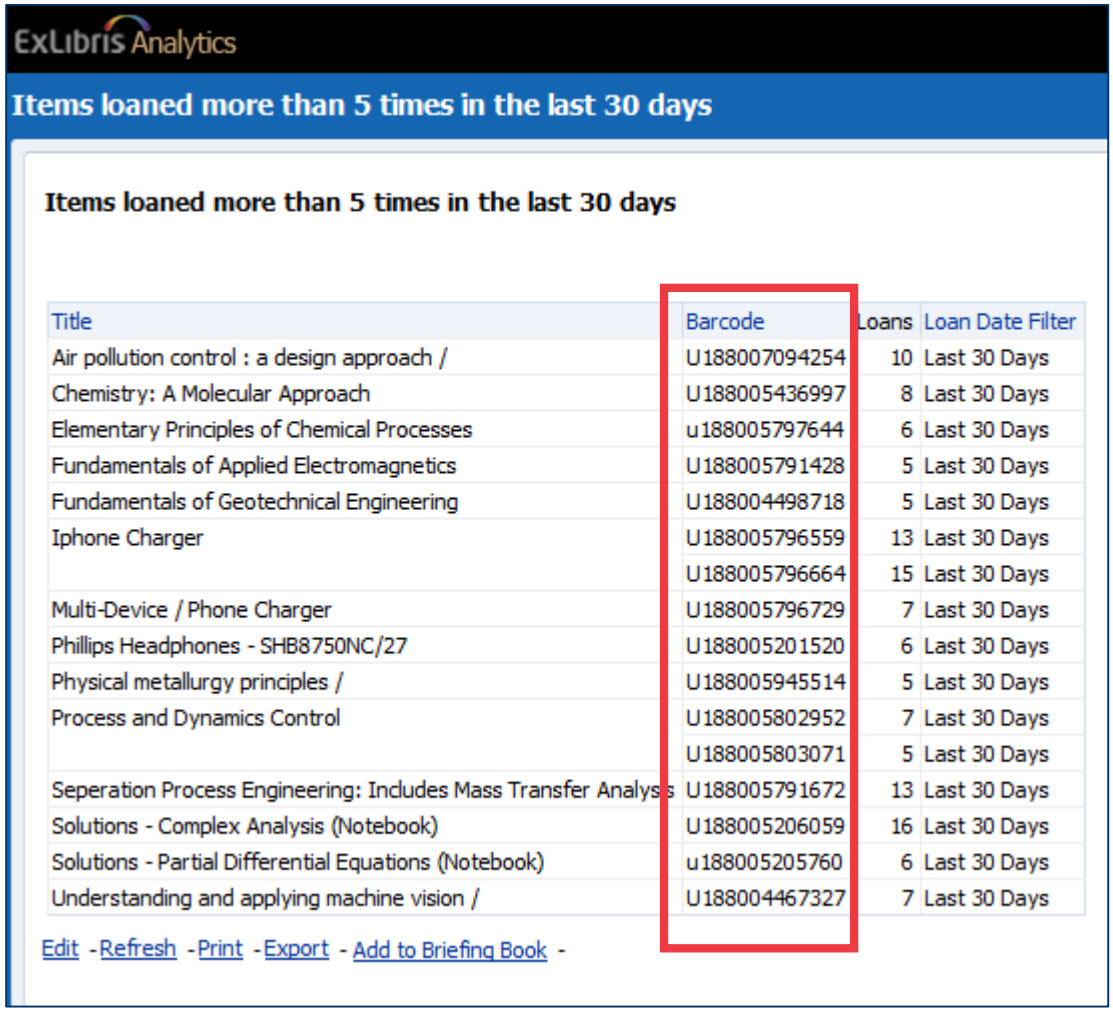
First example

- 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’


ExLibris Analytics

Items loaned more than 5 times in the last 30 days

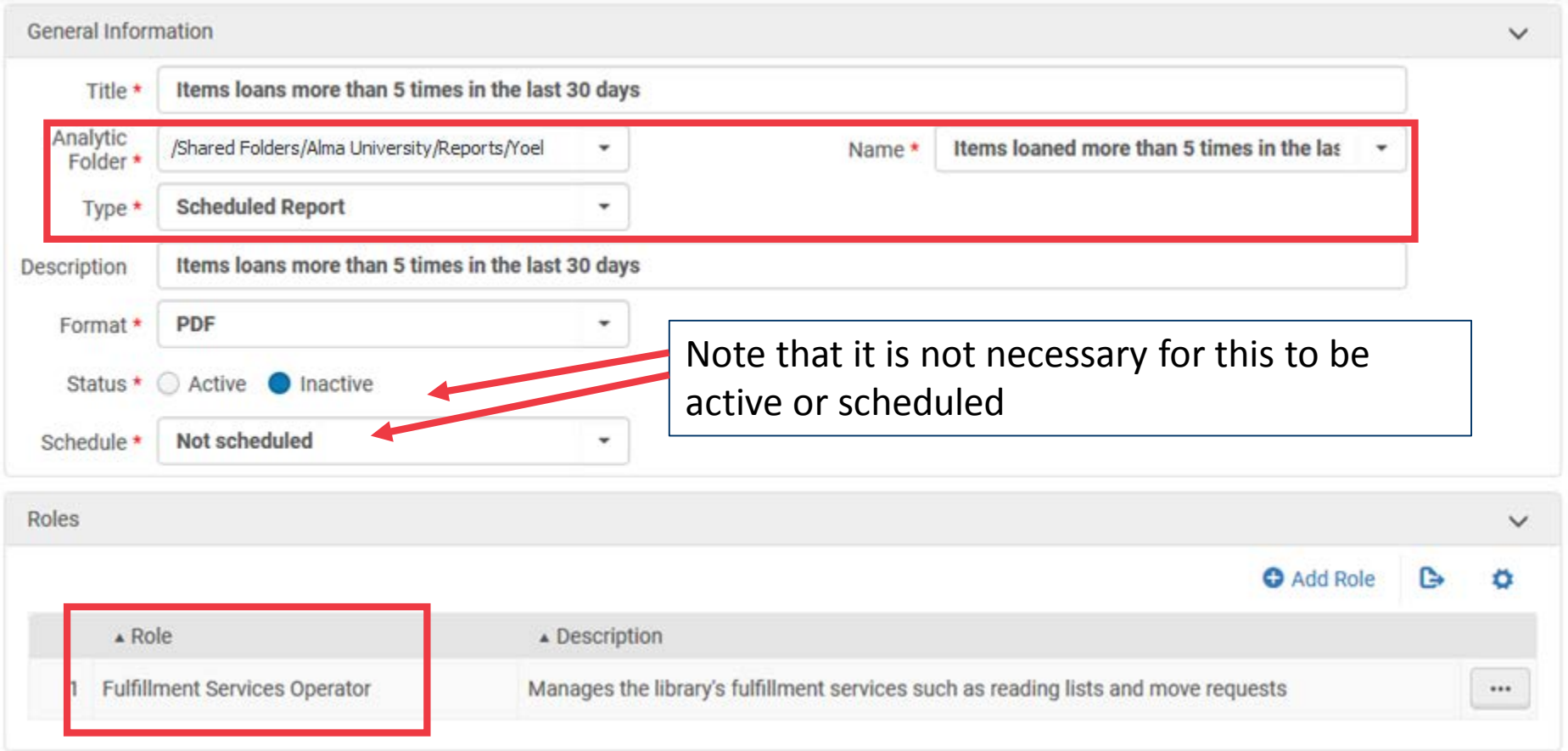
Items loaned more than 5 times in the last 30 days

Title	Barcode	Loans	Loan Date Filter
Air pollution control : a design approach /	U188007094254	10	Last 30 Days
Chemistry: A Molecular Approach	U188005436997	8	Last 30 Days
Elementary Principles of Chemical Processes	u188005797644	6	Last 30 Days
Fundamentals of Applied Electromagnetics	U188005791428	5	Last 30 Days
Fundamentals of Geotechnical Engineering	U188004498718	5	Last 30 Days
Iphone Charger	U188005796559	13	Last 30 Days
	U188005796664	15	Last 30 Days
Multi-Device / Phone Charger	U188005796729	7	Last 30 Days
Phillips Headphones - SHB8750NC/27	U188005201520	6	Last 30 Days
Physical metallurgy principles /	U188005945514	5	Last 30 Days
Process and Dynamics Control	U188005802952	7	Last 30 Days
	U188005803071	5	Last 30 Days
Seperation Process Engineering: Includes Mass Transfer Analysis	U188005791672	13	Last 30 Days
Solutions - Complex Analysis (Notebook)	U188005206059	16	Last 30 Days
Solutions - Partial Differential Equations (Notebook)	u188005205760	6	Last 30 Days
Understanding and applying machine vision /	U188004467327	7	Last 30 Days

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

First example

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



First example

- 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"

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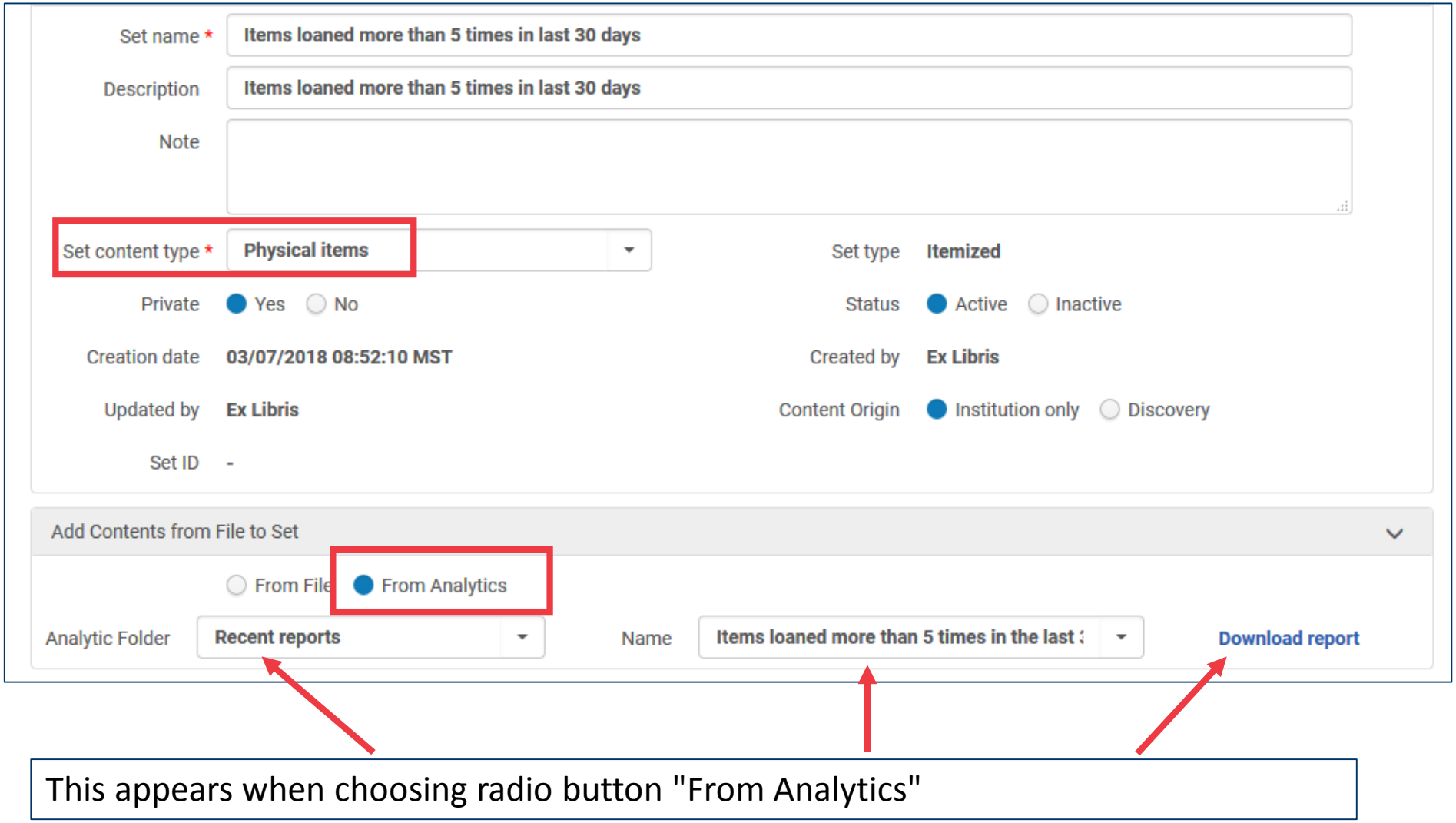
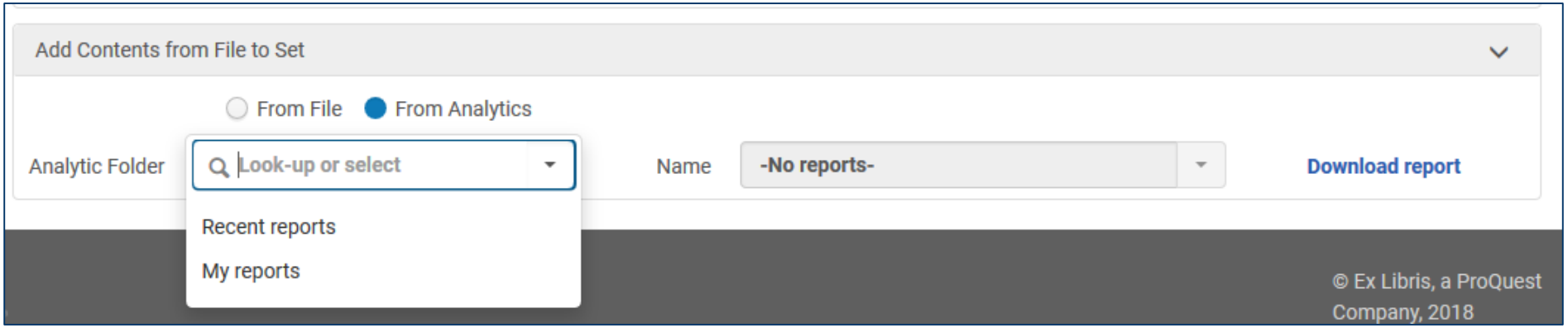
First example



This appears when choosing radio button "From Analytics"

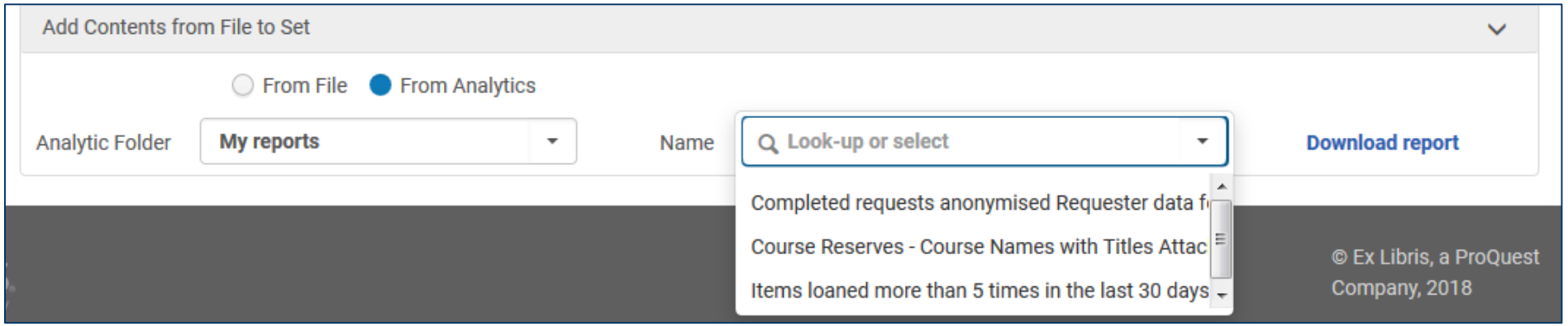
First example

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



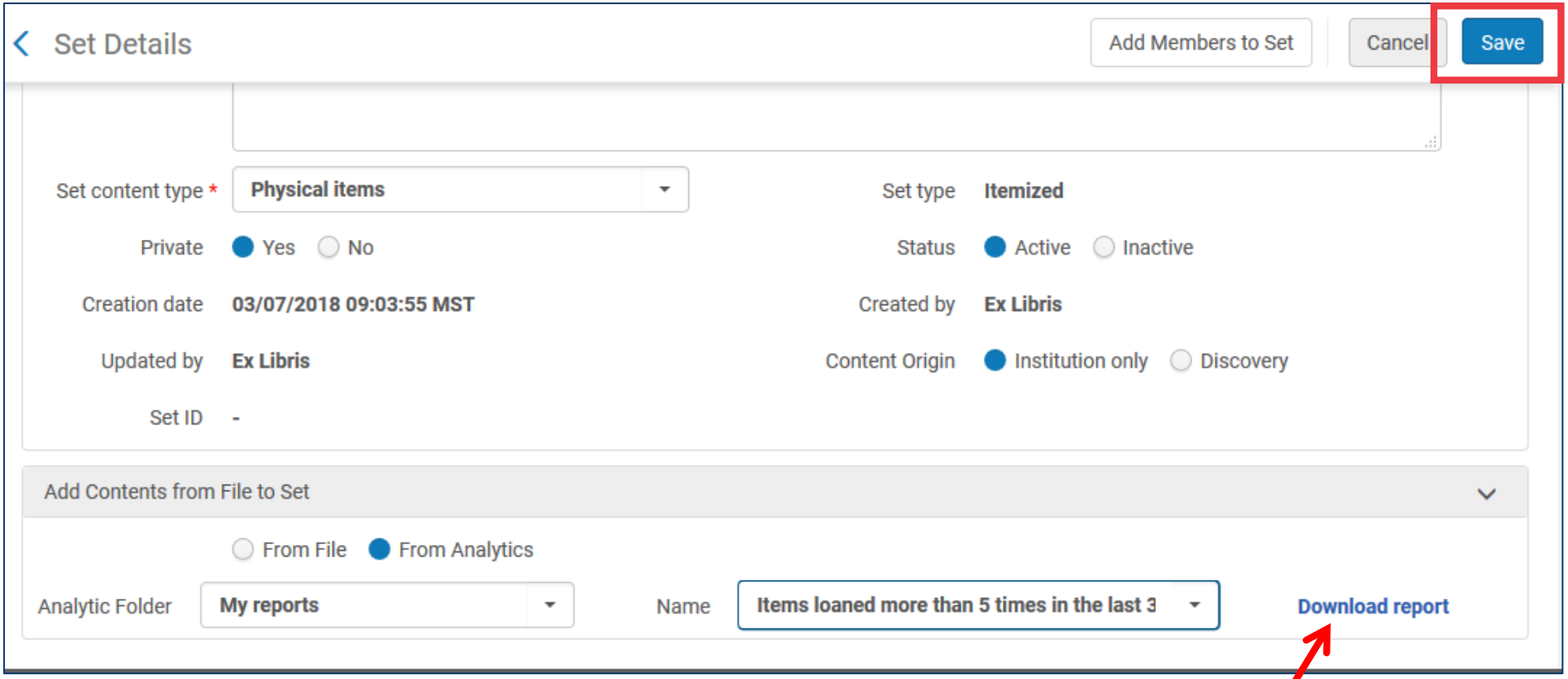
First example

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



First example

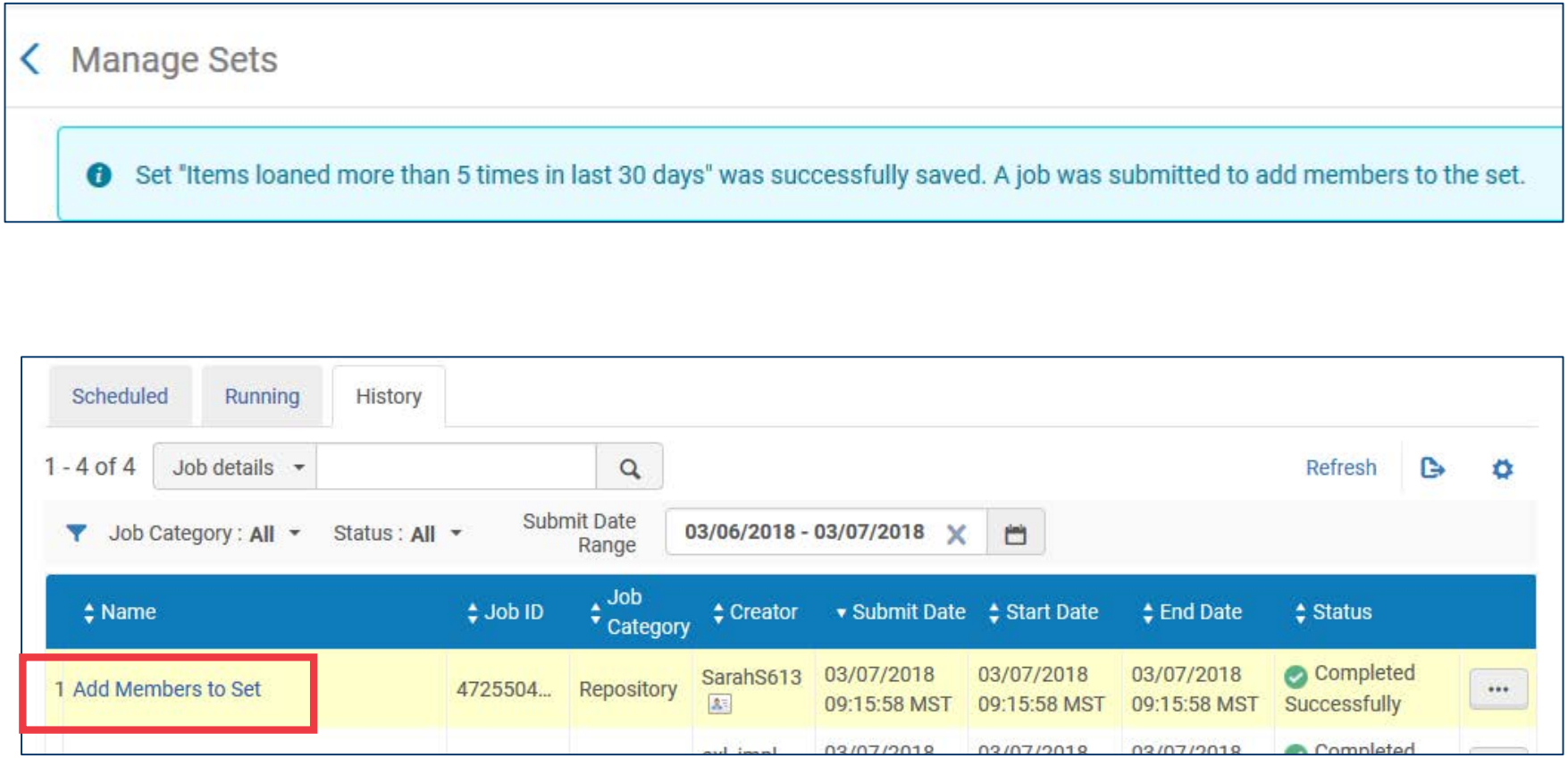
- Now we will save the set



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

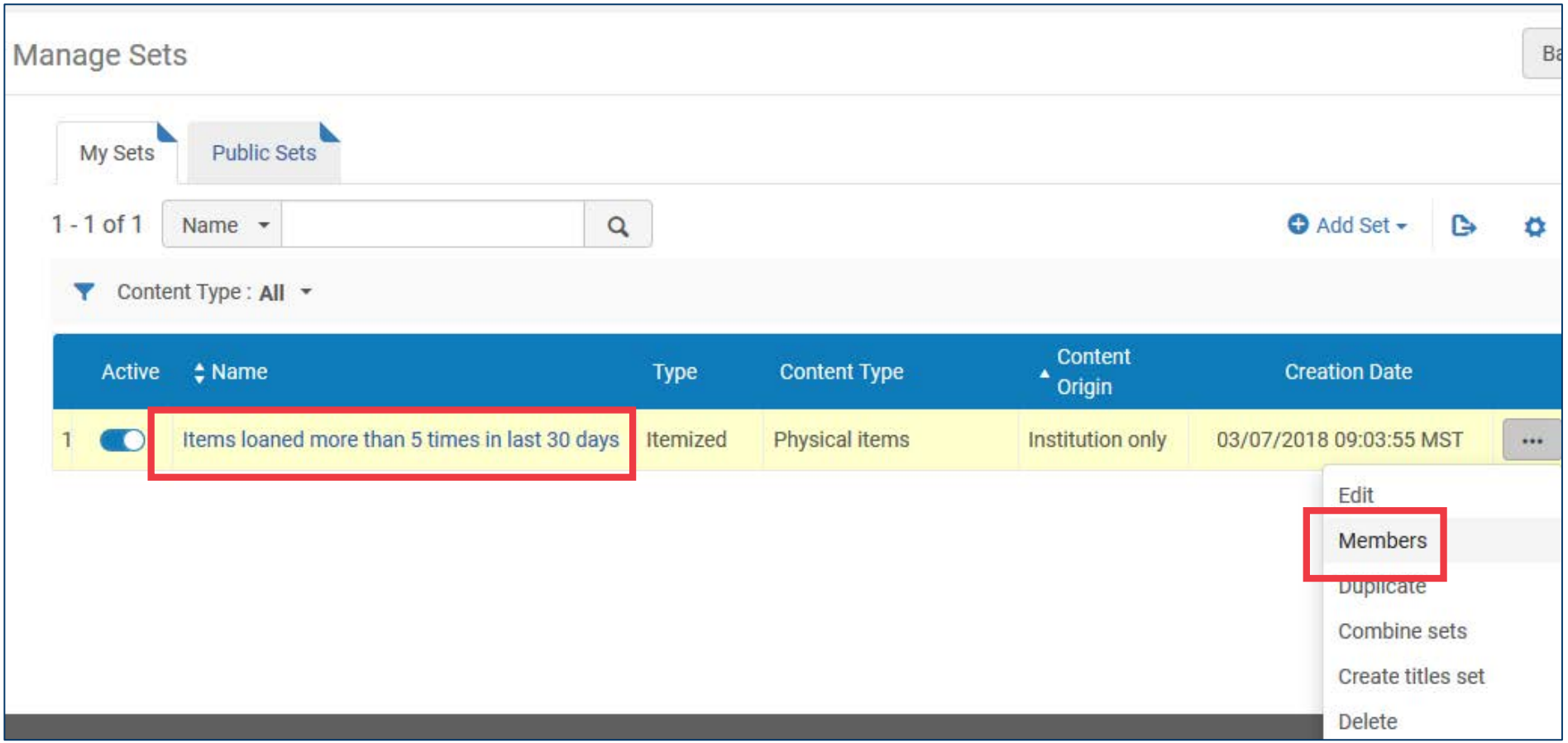
First example

- A job is submitted for the set to be built



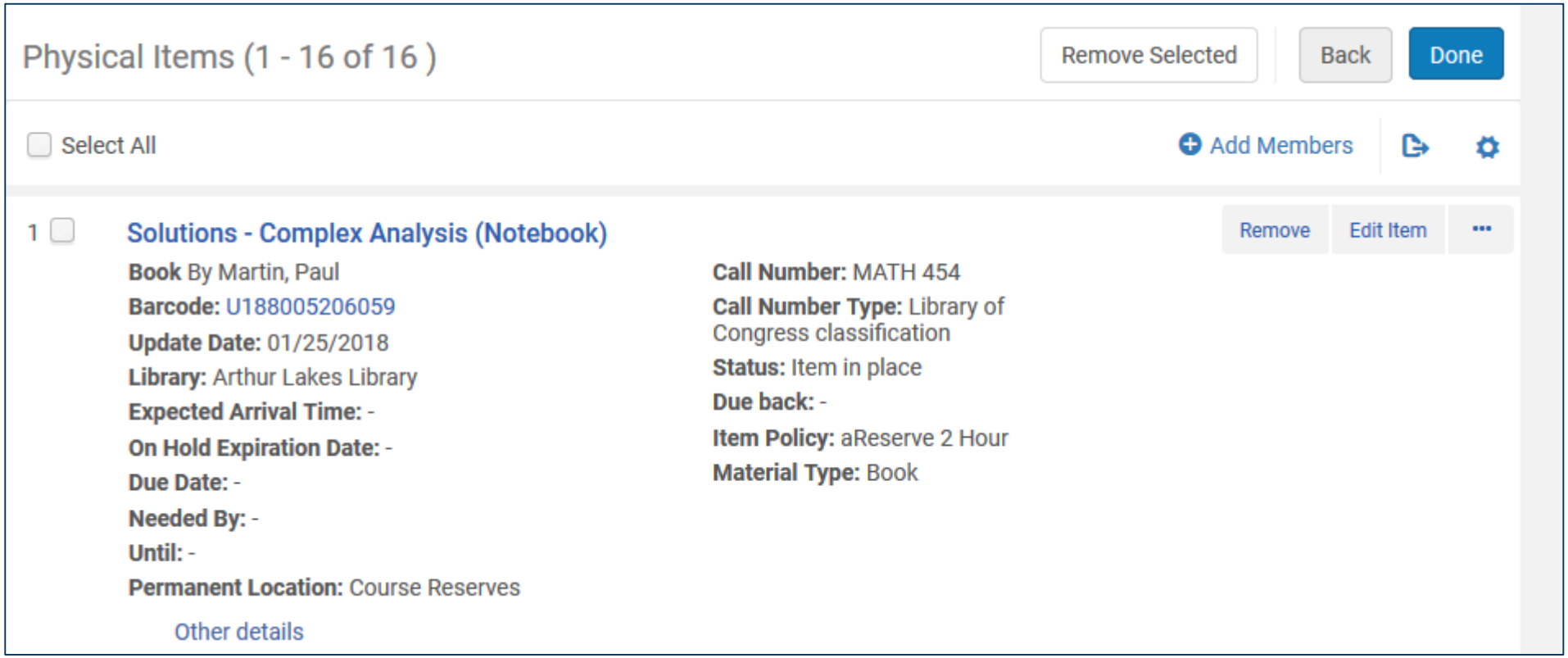
First example

- The set is created



First example

- It contains the same items which were in the analytics report



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2. How does it work?
3. First example
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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.

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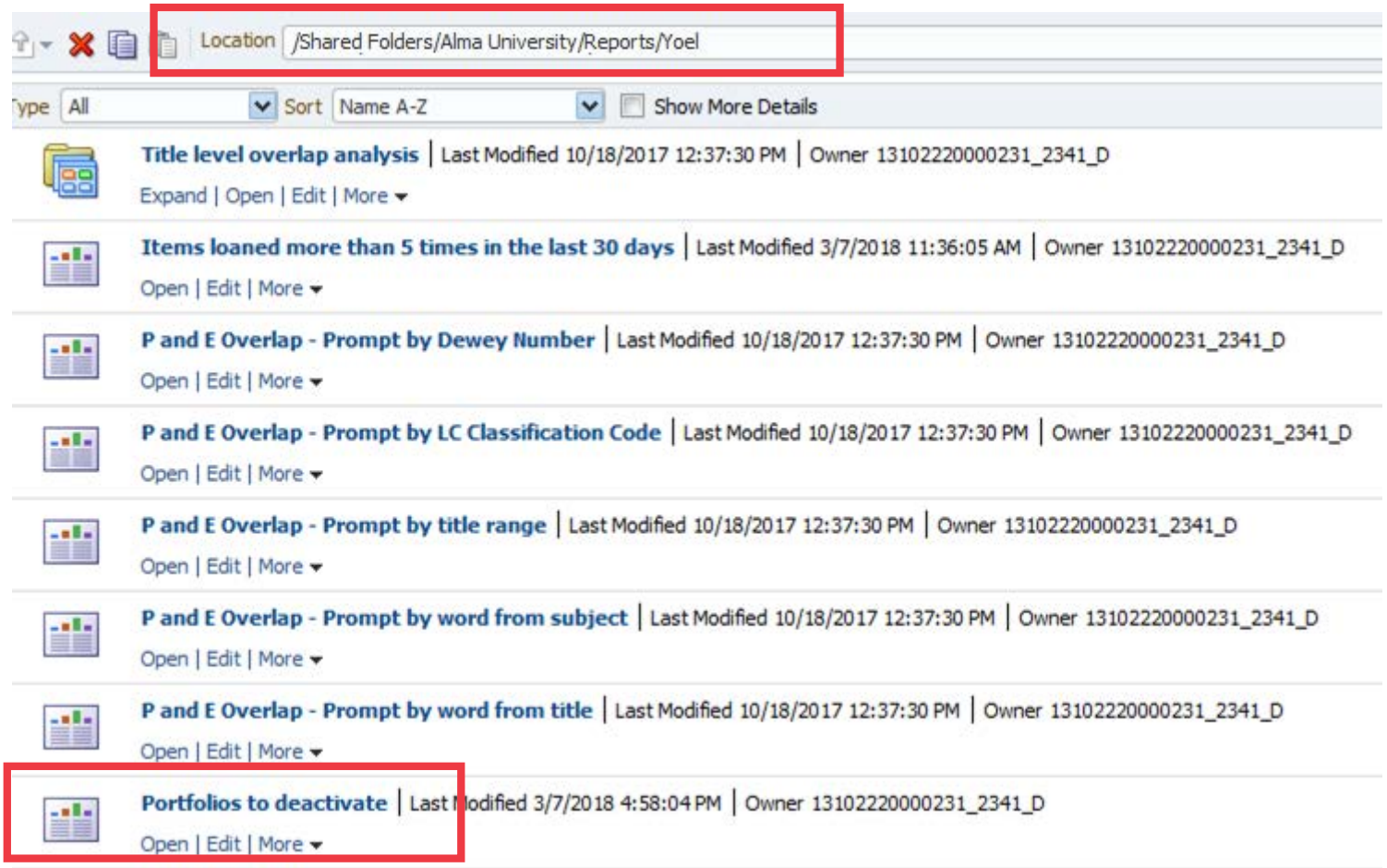
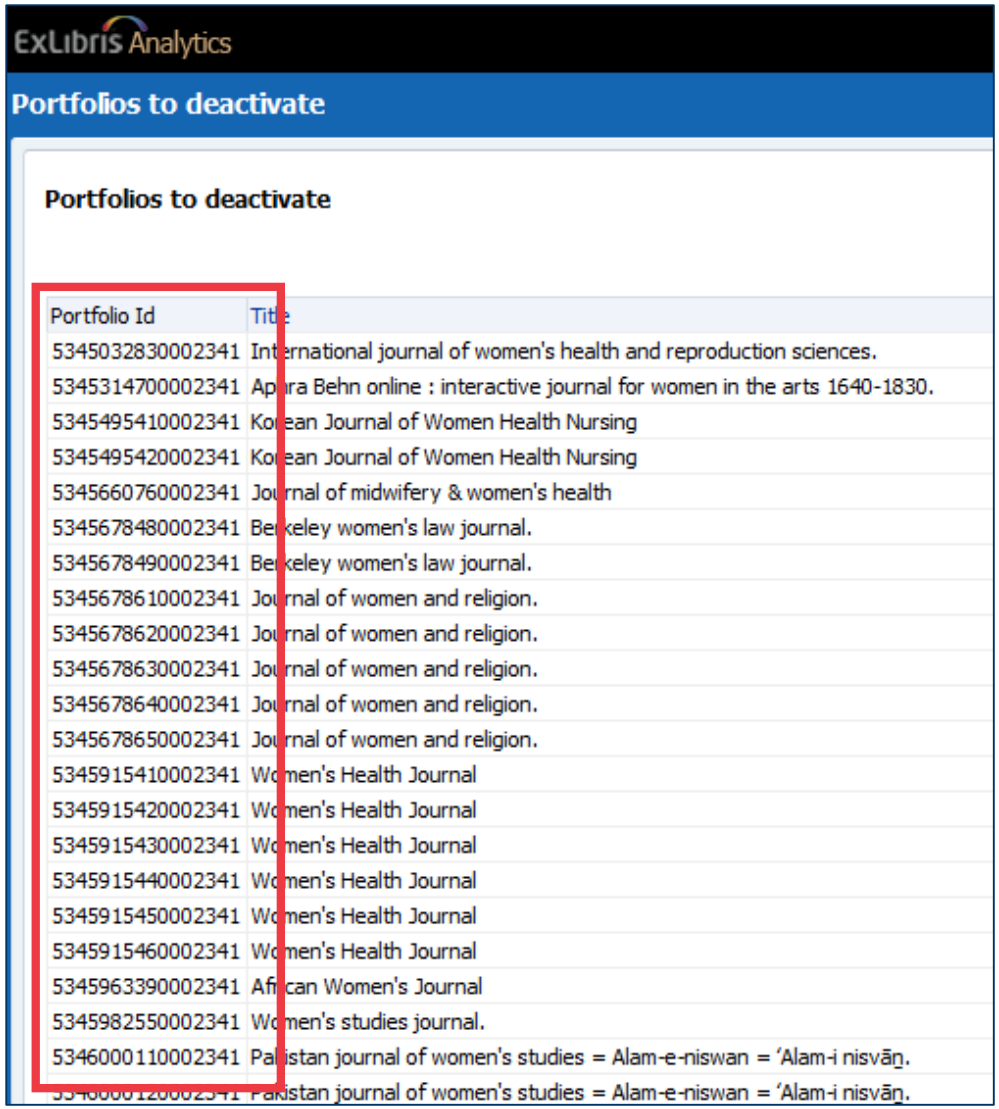
Second example

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



Second example

- Here is the report. It includes Portfolio ID



Portfolio Id	Title
5345032830002341	International journal of women's health and reproduction sciences.
5345314700002341	Aphra Behn online : interactive journal for women in the arts 1640-1830.
5345495410002341	Korean Journal of Women Health Nursing
5345495420002341	Korean Journal of Women Health Nursing
5345660760002341	Journal of midwifery & women's health
5345678480002341	Berkeley women's law journal.
5345678490002341	Berkeley women's law journal.
5345678610002341	Journal of women and religion.
5345678620002341	Journal of women and religion.
5345678630002341	Journal of women and religion.
5345678640002341	Journal of women and religion.
5345678650002341	Journal of women and religion.
5345915410002341	Women's Health Journal
5345915420002341	Women's Health Journal
5345915430002341	Women's Health Journal
5345915440002341	Women's Health Journal
5345915450002341	Women's Health Journal
5345915460002341	Women's Health Journal
5345963390002341	African Women's Journal
5345982550002341	Women's studies journal.
5346000110002341	Pakistan journal of women's studies = Alam-e-niswan = 'Alam-i nisvāṉ.
[illegible]	Pakistan journal of women's studies = Alam-e-niswan = 'Alam-i nisvāṉ.

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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"

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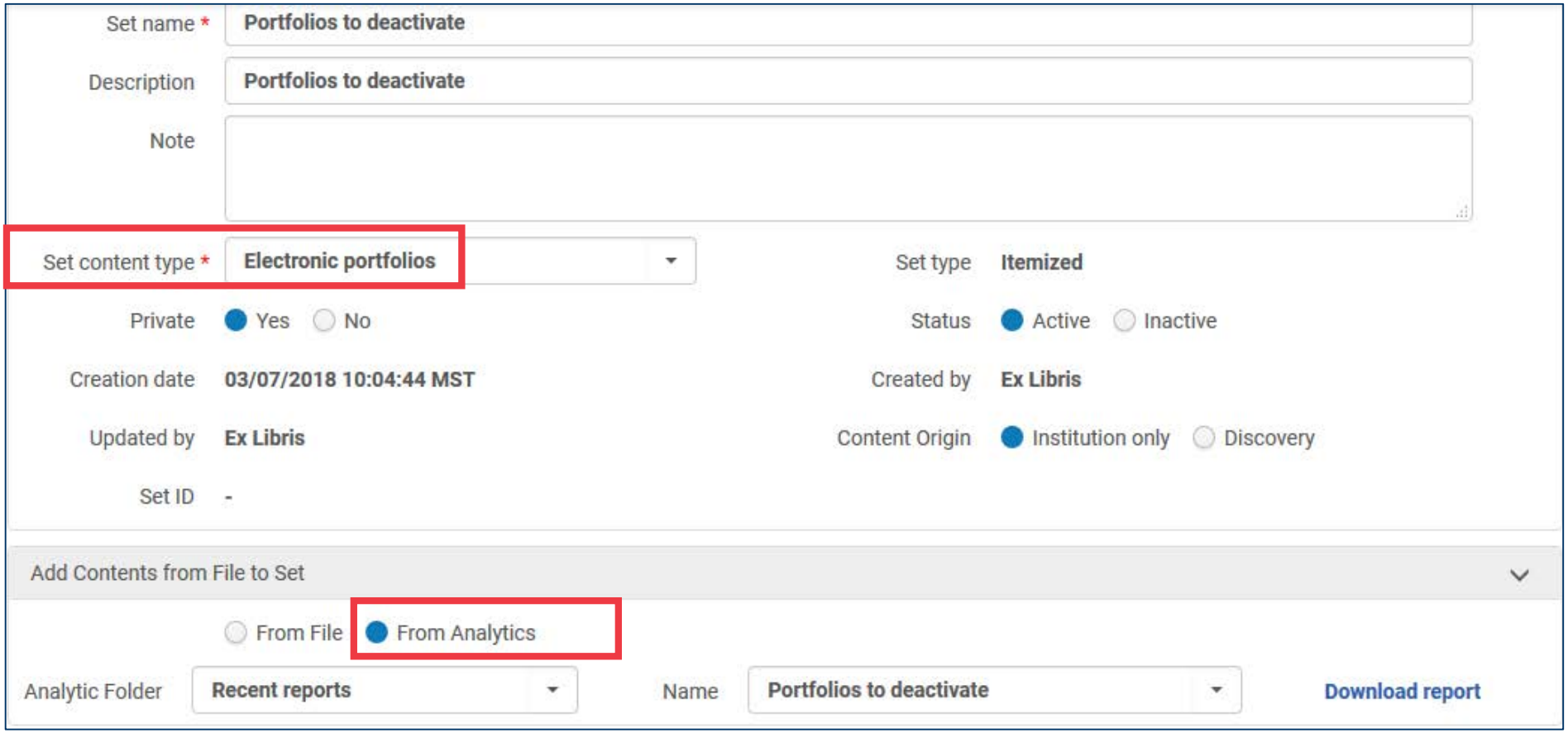
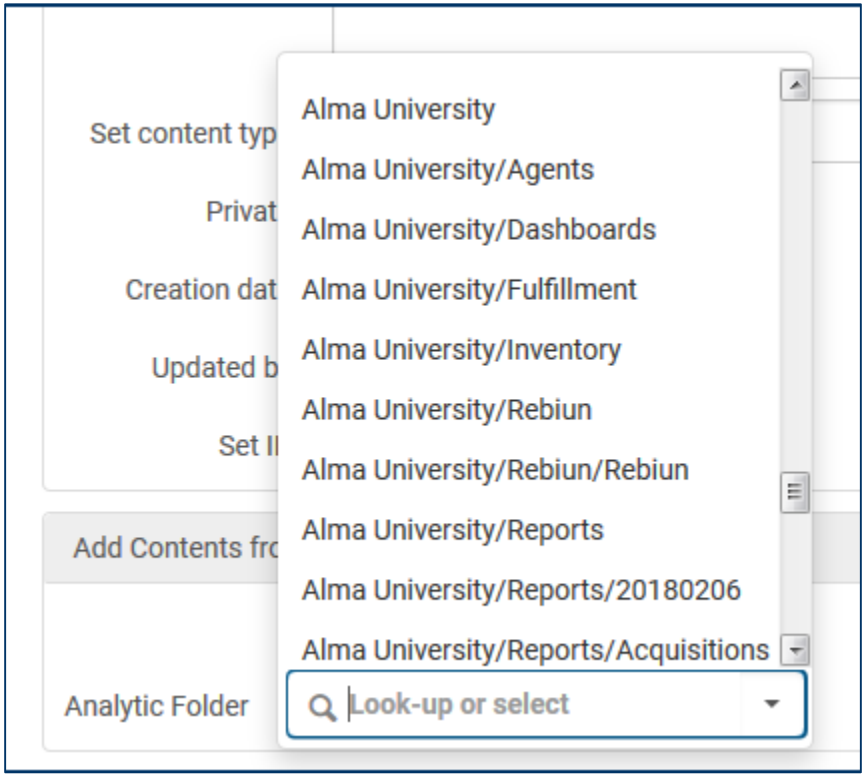
Second example



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’



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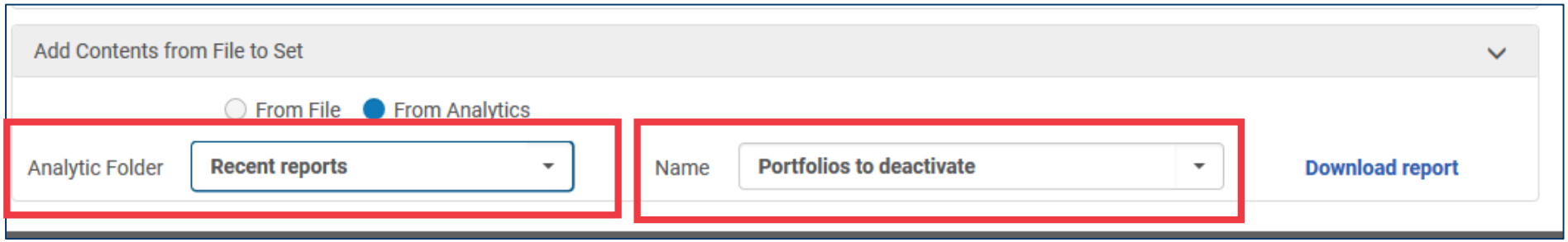
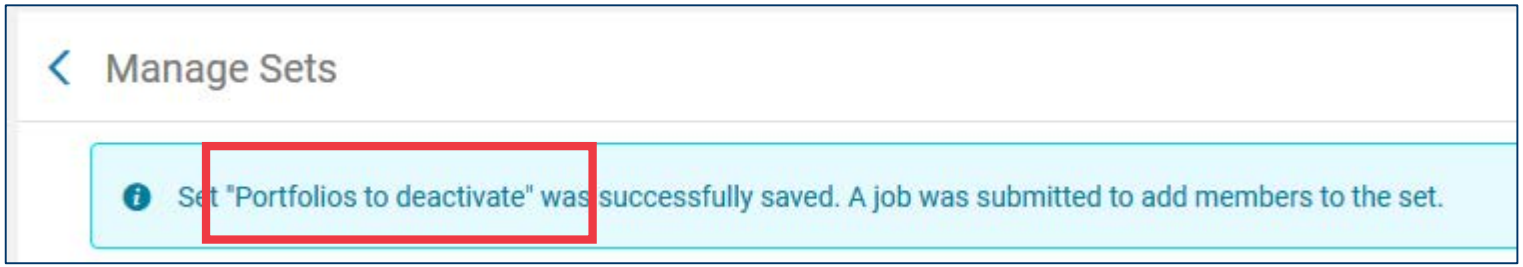
Second example

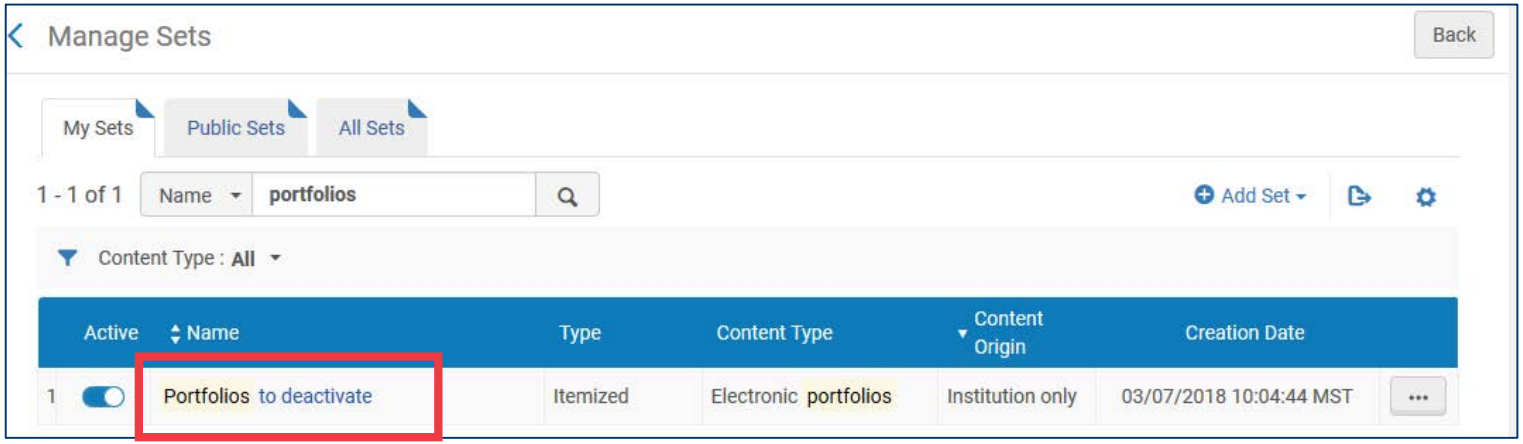
- He chooses the desired folder and report and clicks "Save".
- He can also choose folder "Recent reports" and this will include anything he ran in the last hour from ‘Design analytics’



Second example

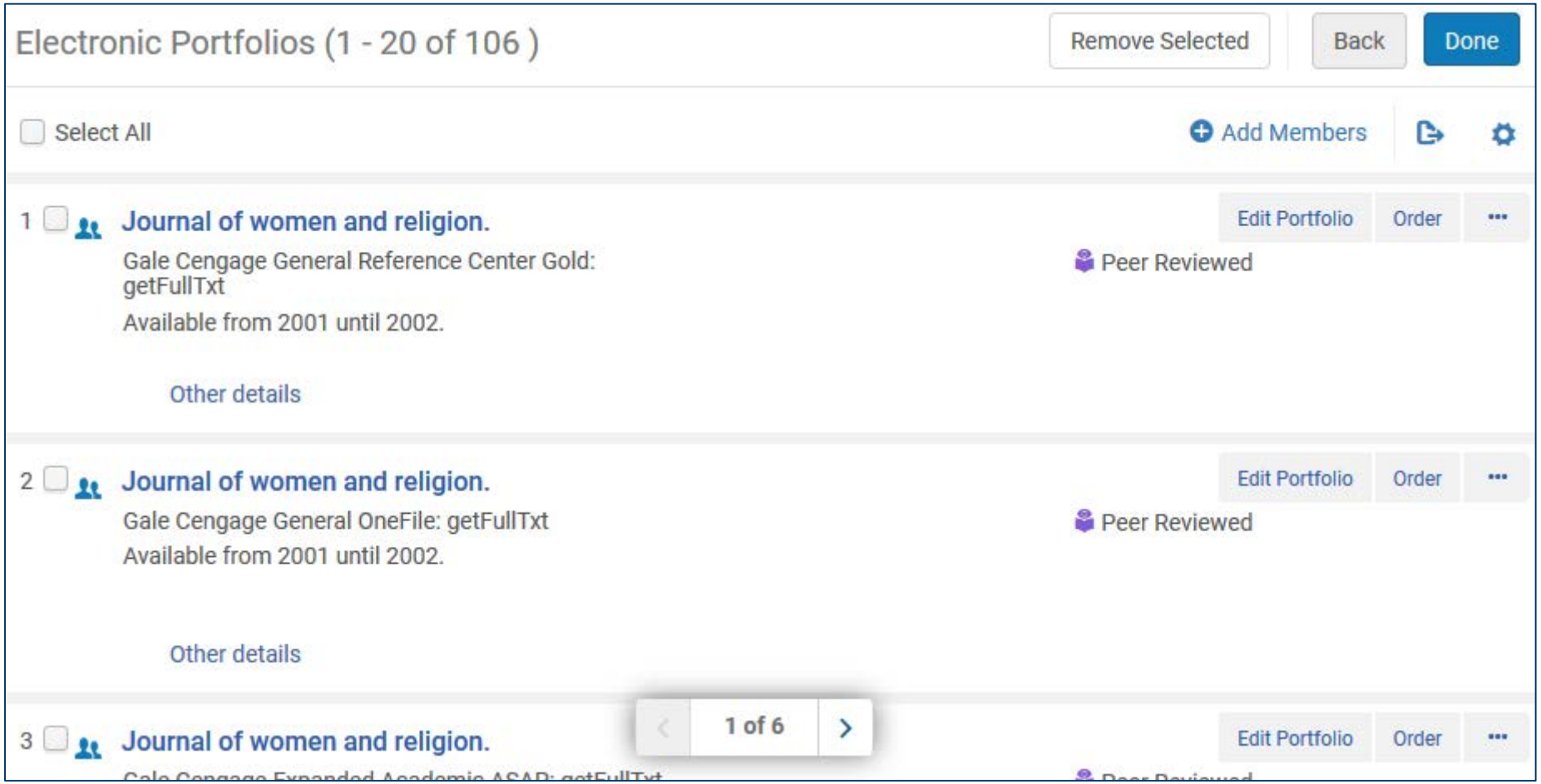
- As with Sarah the job is submitted and the set is created





Second example

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



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