



ELUNA 2018

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Spokane, WA

Creating sets in Alma from Alma Analytics Reports

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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.

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

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

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](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"

User Roles

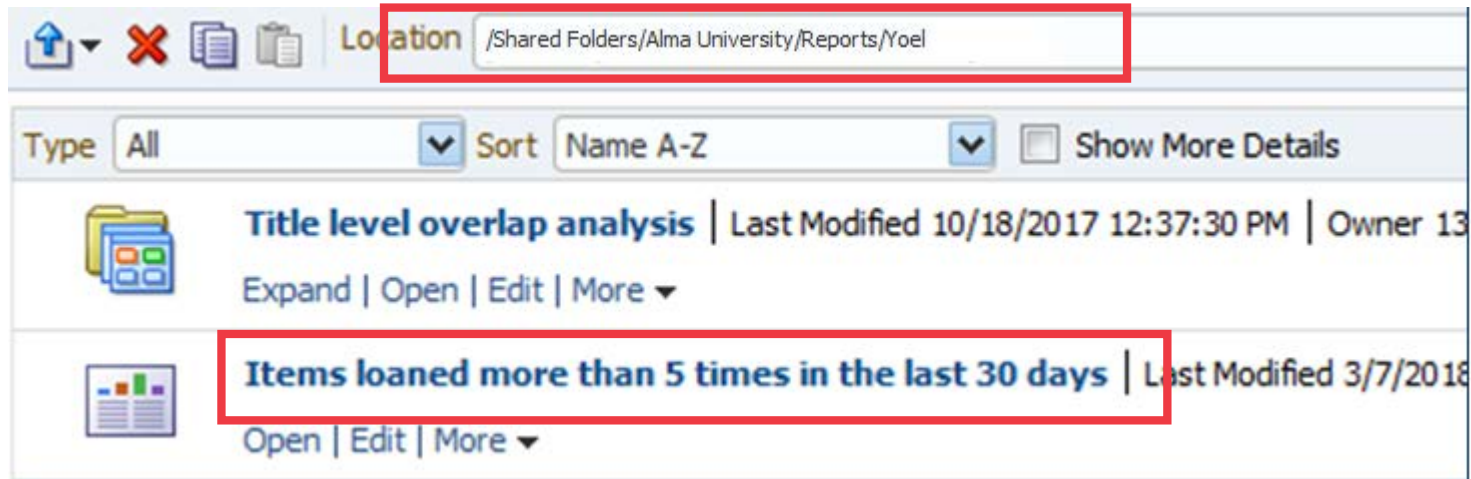
1 - 6 of 6

Actions ▾ + Add from Profiles - Remove Selected

	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1	<input checked="" type="checkbox"/>	Work Order Operator	Fulfillment	Alma University	-	03/07/2018	...
2	<input checked="" type="checkbox"/>	Physical Inventory Operator	Inventory	Alma University	-	03/07/2018	...
3	<input checked="" type="checkbox"/>	Patron	Fulfillment	Alma University	-	03/07/2018	...
4	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Alma University	-	03/07/2018	...
5	<input checked="" type="checkbox"/>	Fulfillment Administrator	Fulfillment	Alma University	-	03/07/2018	...
6	<input checked="" type="checkbox"/>	Electronic Inventory Operator	Inventory	Alma University	-	03/07/2018	...

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"

General Information

Title *

Analytic Folder * Name *

Type *

Description

Format *

Status * Active Inactive

Schedule *

Roles

+ Add Role

Role	Description
1 Fulfillment Services Operator	Manages the library's fulfillment services such as reading lists and move requests

Note that it is not necessary for this to be active or scheduled

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"

First example

Set name * **Items loaned more than 5 times in last 30 days**

Description **Items loaned more than 5 times in last 30 days**

Note

Set content type * **Physical items**

Set type **Itemized**

Private Yes No

Status Active Inactive

Creation date **03/07/2018 08:52:10 MST**

Created by **Ex Libris**

Updated by **Ex Libris**

Content Origin Institution only Discovery

Set ID -

Add Contents from File to Set

From File From Analytics

Analytic Folder **Recent reports**

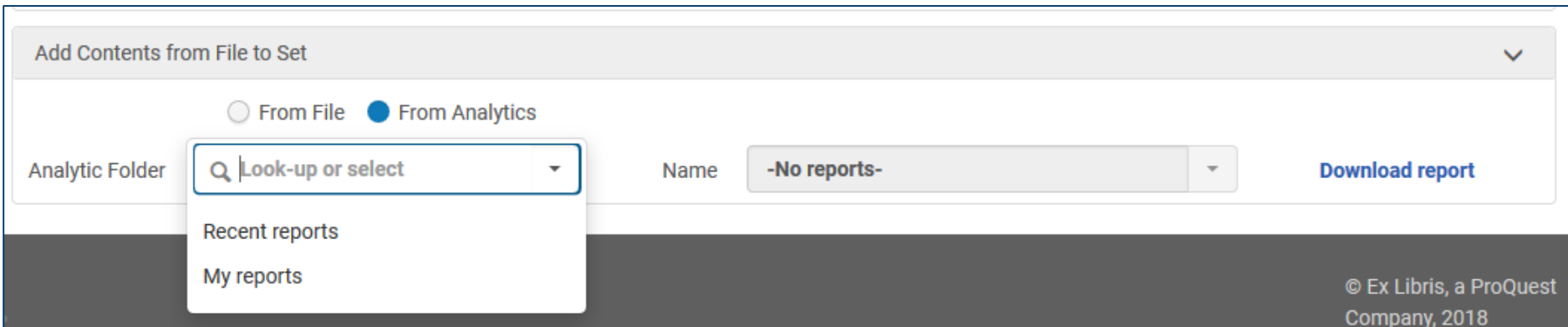
Name **Items loaned more than 5 times in the last :**

[Download report](#)

This appears when choosing radio button "From Analytics"

First example

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



The screenshot shows a web interface for adding content to a set. At the top, there is a header "Add Contents from File to Set" with a dropdown arrow. Below this, there are two radio buttons: "From File" (unselected) and "From Analytics" (selected). Under "From Analytics", there is a section for "Analytic Folder" with a search icon and the text "Look-up or select" followed by a dropdown arrow. A dropdown menu is open below this, showing two options: "Recent reports" and "My reports". To the right of the "Analytic Folder" section is a "Name" field with a dropdown arrow, currently showing "-No reports-". Further right is a blue button labeled "Download report". In the bottom right corner of the interface, there is a copyright notice: "© Ex Libris, a ProQuest Company, 2018".

First example

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

Add Contents from File to Set

From File From Analytics

Analytic Folder **My reports**

Name

Download report

Completed requests anonymised Requester data f
Course Reserves - Course Names with Titles Attac
Items loaned more than 5 times in the last 30 days

© Ex Libris, a ProQuest Company, 2018

First example

- Now we will save the set

Set Details Add Members to Set Cancel **Save**

Set content type * **Physical items**

Private Yes No

Creation date **03/07/2018 09:03:55 MST**

Updated by **Ex Libris**

Set ID -

Set type **Itemized**

Status Active Inactive

Created by **Ex Libris**

Content Origin Institution only Discovery

Add Contents from File to Set

From File From Analytics

Analytic Folder **My reports**

Name **Items loaned more than 5 times in the last 3**

[Download report](#)

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

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

Scheduled Running History

1 - 4 of 4 Job details Refresh

Job Category: All Status: All Submit Date Range: 03/06/2018 - 03/07/2018

Name	Job ID	Job Category	Creator	Submit Date	Start Date	End Date	Status	
1 Add Members to Set	4725504...	Repository	SarahS613 <input type="button" value="User"/>	03/07/2018 09:15:58 MST	03/07/2018 09:15:58 MST	03/07/2018 09:15:58 MST	Completed Successfully	<input type="button" value="More"/>
				03/07/2018	03/07/2018	03/07/2018	Completed	

First example

- The set is created

Manage Sets

My Sets Public Sets

1 - 1 of 1 Name [] [Q]

+ Add Set [] [] []

Content Type: All []



Active	Name	Type	Content Type	Content Origin	Creation Date
<input checked="" type="checkbox"/>	Items loaned more than 5 times in last 30 days	Itemized	Physical items	Institution only	03/07/2018 09:03:55 MST

- Edit
- Members
- Duplicate
- Combine sets
- Create titles set
- Delete

First example

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

Physical Items (1 - 16 of 16) Remove Selected Back Done

Select All + Add Members  

1 **Solutions - Complex Analysis (Notebook)** Remove Edit Item ...

Book By Martin, Paul	Call Number: MATH 454
Barcode: U188005206059	Call Number Type: Library of Congress classification
Update Date: 01/25/2018	Status: Item in place
Library: Arthur Lakes Library	Due back: -
Expected Arrival Time: -	Item Policy: aReserve 2 Hour
On Hold Expiration Date: -	Material Type: Book
Due Date: -	
Needed By: -	
Until: -	
Permanent Location: Course Reserves	

[Other details](#)



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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"

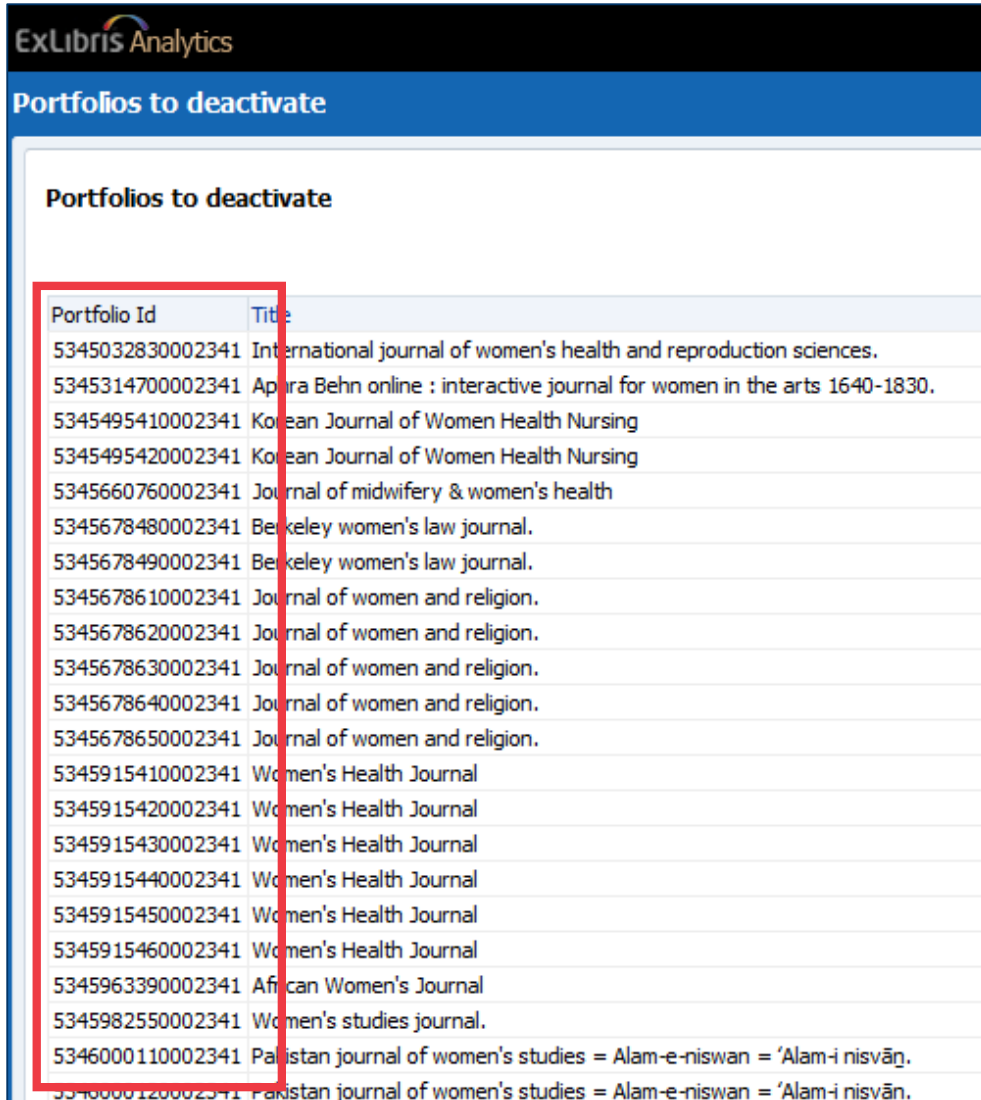
Location: /Shared Folders/Alma University/Reports/Yoel

Type: All | Sort: Name A-Z | Show More Details

	Title level overlap analysis Last Modified 10/18/2017 12:37:30 PM Owner 13102220000231_2341_D
Expand Open Edit More ▾	
	Items loaned more than 5 times in the last 30 days Last Modified 3/7/2018 11:36:05 AM Owner 13102220000231_2341_D
Open Edit More ▾	
	P and E Overlap - Prompt by Dewey Number Last Modified 10/18/2017 12:37:30 PM Owner 13102220000231_2341_D
Open Edit More ▾	
	P and E Overlap - Prompt by LC Classification Code Last Modified 10/18/2017 12:37:30 PM Owner 13102220000231_2341_D
Open Edit More ▾	
	P and E Overlap - Prompt by title range Last Modified 10/18/2017 12:37:30 PM Owner 13102220000231_2341_D
Open Edit More ▾	
	P and E Overlap - Prompt by word from subject Last Modified 10/18/2017 12:37:30 PM Owner 13102220000231_2341_D
Open Edit More ▾	
	P and E Overlap - Prompt by word from title Last Modified 10/18/2017 12:37:30 PM Owner 13102220000231_2341_D
Open Edit More ▾	
	Portfolios to deactivate Last Modified 3/7/2018 4:58:04 PM Owner 13102220000231_2341_D
Open Edit More ▾	

Second example

- Here is the report. It includes Portfolio ID



ExLibris Analytics

Portfolios to deactivate

Portfolios to deactivate

Portfolio Id	Title
5345032830002341	International journal of women's health and reproduction sciences.
5345314700002341	Apura 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 nisvān.
5346000120002341	Pakistan journal of women's studies = Alam-e-niswan = 'Alam-i nisvān.

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

Set name *	Portfolios to deactivate
Description	Portfolios to deactivate
Note	
Set content type *	Electronic portfolios
Set type	Itemized
Private	<input checked="" type="radio"/> Yes <input type="radio"/> No
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Creation date	03/07/2018 10:04:44 MST
Created by	Ex Libris
Updated by	Ex Libris
Content Origin	<input checked="" type="radio"/> Institution only <input type="radio"/> Discovery
Set ID	-

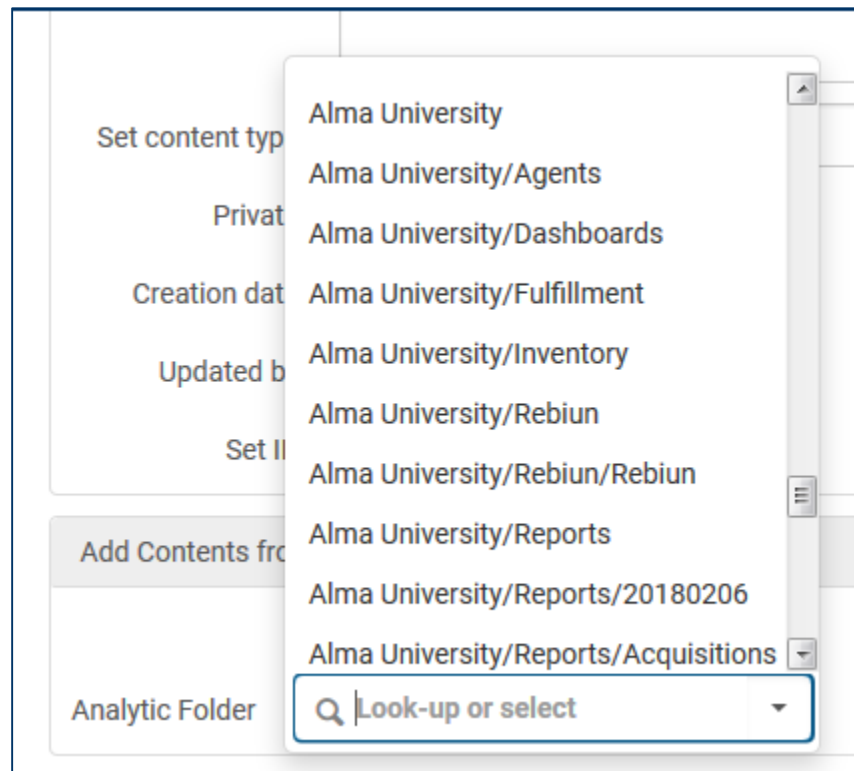
Add Contents from File to Set

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'

Add Contents from File to Set

From File From Analytics

Analytic Folder: **Recent reports**

Name: **Portfolios to deactivate**

[Download report](#)

Second example

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

< Manage Sets

Set "Portfolios to deactivate" was successfully saved. A job was submitted to add members to the set.

< Manage Sets Back

My Sets Public Sets All Sets

1 - 1 of 1 Name portfolios + Add Set + ⚙



Content Type : All


Active	Name	Type	Content Type	Content Origin	Creation Date	
<input checked="" type="checkbox"/>	Portfolios to deactivate	Itemized	Electronic portfolios	Institution only	03/07/2018 10:04:44 MST	...


Second example

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

Electronic Portfolios (1 - 20 of 106)


Select All + Add Members  


1  **Journal of women and religion.** Edit Portfolio Order ...

Gale Cengage General Reference Center Gold: getFullTxt  Peer Reviewed

Available from 2001 until 2002.


[Other details](#)


2  **Journal of women and religion.** Edit Portfolio Order ...



Gale Cengage General OneFile: getFullTxt  Peer Reviewed

Available from 2001 until 2002.

[Other details](#)

3  **Journal of women and religion.** Edit Portfolio Order ...

Gale Cengage Expanded Academic ASAP: getFullTxt  Peer Reviewed

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ELUNA 2018

May 1 - 4, 2018

Spokane, WA



Education. Networking. Advocacy.



Thank You
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