Extending Alma Analytics Analysis with Tableau Vizzes

ELUNA - Spokane
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Many Ex Libris customers use Tableau Software for business intelligence. Tableau provides a way to visualize data from various sources. In April of 2017 Ex Libris announced the availability of an open source Web Data Connector (WDC), which provides a mechanism to connect Tableau to Alma data via the Alma Analytics API.
Today’s presentation

This session will describe and demonstrate the process for connecting Tableau to the Alma Analytics API using the ExLibris WDC, and provide examples of Tableau visualizations (vizzes) that are based on data obtained through the WDC connection. Participants will leave the session with a basic understanding of the requirements for moving their Alma Analytics data into Tableau visualizations.
Background

• In order to facilitate creating the connection from Tableau to Alma Analytics, Ex Libris has built a Web Page which can be “plugged in” to the Tableau Web Data Connector.

• Resources – ExLibris Knowledge Center

  Home >> Alma >> Training >> Extended Training >> Presentations and Documents – Analytics

  • Analytics - Using Alma Analytics with the Tableau Web Data Connector.pptx
  • Tableau Web Data Connector Ex Libris Developers Network Blog
  • Alma Analytics and Tableau Web Data Connector Integration - Youtube video for Igelu SIWG

Note: Excerpts from the ExLibris Knowledge Center materials used throughout this presentation
Tableau options

1. Tableau Server
   - Enterprise ($$$$)
   - Online ($$$)
   - Public (Free)

2. Tableau Desktop
   - Enterprise ($$$)
   - Public (Free)

Tableau Desktop Download: https://www.tableau.com/support/releases
Current Version: 2018.1
WDC requirements - Three necessary elements

1. The URL of the ExLibris Tableau WDC web page

2. The API key which allows accessing Alma (or Primo) Analytics reports for your institution

3. The path and name of the Alma (Or Primo) Analytics report
The three necessary elements - #1

- The first necessary element is the URL of the Tableau WDC web page:

Example:

https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html
The three necessary elements - #2

- The second necessary element is the API key for your institution which allows access to analytics reports.
The three necessary elements - #3

• The third necessary element is the path of the report.

The path is (and it can be with or without the escape characters, either / or %2F.
Using the Tableau Web Data Connector (WDC)

- Start Tableau. In right hand column choose “Web Data Connector”
The Tableau Web Data Connector

• Enter the URL which we already mentioned and hit enter:
  https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html
The Tableau Web Data Connector

- Fill in the API Key, choose Alma or Primo, fill in path, choose your region, and click “Get data”
The Tableau Web Data Connector

• For Alma Analytics --- Instead of manually filling in the report path you can also click the magnifying glass at the end of the field.
Example 1 – Tableau dashboard using Alma benchmark data
Example 1 – Tableau dashboard using Alma benchmark data
Example 1 – Tableau dashboard using Alma benchmark data

Add filters to the analysis criteria by clicking on Filter option for the specific column filter by clicking on add button after selecting its name in the catalog pane.

Is Consortia Member Institution is equal to / is in No
Example 1 – Tableau dashboard using Alma benchmark data
Example 2 – Tableau dashboard using Primo trend data

TIMESTAMPADD(SQL_TSI_MONTH, -16, CURRENT_DATE)
Example 2 – Tableau dashboard using Primo trend data
Example 2 – Tableau dashboard using Primo trend data
Example 2 – Tableau dashboard using Primo trend data
Example 2 – Tableau storyboard using Primo Analytics data

Discovery performance indicators at the Iowa State University Library

This map shows the average Primo sessions per month for the Iowa State University Library, over the last 12 months.

Here are the total number of discovery sessions per month for the Iowa State University Library, for the last year.

This dashboard shows the average number of facet discovery sessions, as well as the trend for this month in January of 2019.
More Iowa State University Library examples of Tableau use

• Iowa State University Library Assessment Website
  • http://assess.lib.iastate.edu
Live Demo

[Image: Breaking the Prairie, Grant Wood (1937)]
Questions?

Contact: Greg Davis, email: davisgr@iastate.edu

Presentation Materials: https://iastate.box.com/s/ib0qvz8p69pbmfl5ztglelzqbvdxasxu