



PALS

September 6, 2019

Carrie Curie & Etta Thornburg

Analytics: Laying the Groundwork



MINNESOTA STATE



Agenda

Agenda:

- Business Practices for Analytics Use & Data Awareness
- What You Can Do with Analytics
- Permissions
 - Roles
 - Access
- Live Demo
- Homework: Privacy Concerns – Your Policies
- Survey

Business Practices for Analytics Use & Data Awareness

Business Practices for Analytics Use

- Why look at Analytics
 - Enables long-term planning
 - Provides more confidence on dealing with uncertainty despite a flood of information

Business Practices for Analytics Use

- Provide objective goals with figures and evidence
- Reveal relationships between different parts of the library
- Continuous improvement, what is working and what isn't?

Business Practices for Analytics Use

- Know what you want to measure to manage the numbers, don't let the numbers do the managing for you
- Before you start digging into statistics, know what you want to ask of the data

Data Awareness

- Data is there to help us make decisions
- Helps us select data that provides accurate answers to our questions

Data Awareness

Looking at Alma Analytics for making decisions starts with the data need. Here are some questions to consider:

- What topic or subject area you are interested in?
- What are you trying to figure out?
- What is the timeframe of what you're trying to count?

Knowing Is Half the Battle

- What issues or questions do you require information about?
- What are your objectives and expectations?
- How do the results of your analysis of Alma Analytics compare to your objectives and expectations?
- Review, always review. Alma Analytics is collecting new data all the time for you to evaluate at the necessary intervals.

What You Can Do with Analytics

What You Can Do with Analytics

- Use out of the box reports
- Make your own reports
- Use Community reports
- Contribute to community
- Can pull data
- Modify reports
- Share data with others at your institution
- Private workspace, viewable only to operator creating the analyses
- Time Trends
- Track and compare

Limitations of Analytics

- Data – day old – timing of data
- Not all data is available/extracted
- Not all subject areas can be joined

Alma data loads to analytics:

- What is queried
- Timeline of data
- Extraction – early evening
- Loaded after extractions
- How to find when last loaded

Data Frequency



* Time of the last extract can be found under the Analytics drop down in the Alma navigation bar.

“Data available as of” & “Data updated as of” Information

The screenshot shows a web application interface with a blue header bar. The header contains the text "Analytics" on the left and "TST Main Library - Main Circ Desk" on the right. A dropdown menu is open, listing various options under "Analytics" and "Reports". At the bottom of the menu, two grey boxes are highlighted with orange borders. The left box contains the text "Data available as of: 08/07/2019 24:50:10 CDT" and the right box contains "Data updated as of: 08/06/2019 19:00:00 CDT". Below these boxes is a search prompt: "Click here to search for any menu link or press Alt+Ctrl+F".

mode=ajax

Analytics TST Main Library - Main Circ Desk

Analytics Reports

Design Analytics Data Review Dashboard

Design Analytics (Primo) Overdues

Subscribe to Analytics

Analytics Objects

Analytics Objects List

Analytics User Statistics

Analytics Citation Attribute Types

Analytics Member Settings

Data available as of: 08/07/2019 24:50:10 CDT

Data updated as of: 08/06/2019 19:00:00 CDT

Click here to search for any menu link or press Alt+Ctrl+F

The Story in Your Data

What stories do you need to tell about the health and activity of the library with Analytics?

- Who needs to see the information?
- What are they most interested in?

Getting Started

- How many use analytics on a regular basis?
- Taking steps to make analytics easily accessible
 - Widgets for quick visual access
 - Scheduling reports and dashboards for more in-depth review

How Much Is Too Much?

- How often do you need to look at analytics?
 - Most reports are updated daily
- How often do you need to check statistics?
 - Monthly?
 - Quarterly?
- How often are you reporting on library activities to someone else?

Points of Consideration – Developing Your Policies

- Who has access
- What access provided
- Skill level for access
- Oob/customize/adv sql
- What do they really need
- Privacy/security concerns
- Analytics:
- Folks can't change the underlying data
- Can see it all – pts of security concern
- Can modify reports/analysis elements

Permissions

User Roles: Analytics Administrator vs Design Analytics Role

mode=ajax

Analytics TST Main Library - Main Circ Desk

Analytics

- Design Analytics
- Design Analytics (Primo)
- Subscribe to Analytics
- Analytics Objects
- Analytics Objects List
- Analytics User Statistics
- Analytics Citation Attribute Types
- Analytics Member Settings

Reports

- Data Review Dashboard
- Overdues

Data available as of: 08/07/2019 24:50:10 CDT

Data updated as of: 08/06/2019 19:00:00 CDT

Click here to search for any menu link or press Alt+Ctrl+F

User Roles

- Staff operators with the Design Analytics role may create analyses
- Staff operators with the Analytics Administrator role may expose results to those without this role

Permissions

Analytics Administrator can...

- Share reports with users
- Create Statistical Categories
- Configure other Analytics actions

Design Analytics can...

- Create reports

Sharing Reports: Analytics > Analytics Objects List

Analytics Configuration and Subscription

1 - 6 of 6

[+ Add New Analytics Object](#)

Type: **All** Schedule: **All** Status: **All** Analytics Source System: **All**

Title	Description	Type	Schedule	Status	Subscribe
1 Data Review Dashboard	-	Dashboard	-		<input type="button" value="..."/>
2 Expenditures per material type YTD	Expenditures per material type YTD	Widget	-		<input type="button" value="..."/>
3 LEGAL DEPOSIT	Legal Deposit Annual Receipt	Report	-		<input type="button" value="..."/>
4 Number of loans per month last 12 months	Number of loans per month last 12 months	Widget	-		<input type="button" value="..."/>
5 Overdues	-	Report	-		<input type="button" value="..."/>
6 Top 5 vendors spending YTD	Top 5 vendors spending YTD	Widget	-		<input type="button" value="..."/>

Sharing/Scheduling Analytics Reports

- Alternate navigation path to Analytics Objects List: Alma > Administration > Analytics > Configuration Menu > Analytics Objects List
- Key things you can do from the list:
 1. Add New Analytics Object
 2. [more actions] > Manage Subscription for scheduled reports
 - Add either a user name or email address, but not both
 3. Use the Subscribe toggle to manage your personal subscriptions
 4. [more actions] > Edit/Duplicate/Delete

Creating a New Report Object

Alma Analytics Object Cancel Save

Acq_report ▼

Type REPORT

General Information ▼

Title *

Analytic Folder * Name *

Type *

Description

Roles ▼

[+ Add Role](#) [↻](#) [⚙️](#)

▲ Role	▲ Description	
1 Invoice Manager	Manages invoice creation, review and approval actions	⋮
2 Purchasing Manager	Manages authoritative purchasing operations such as purchase orders review and sending, purchasing license related issues etc.	⋮

What a Shared Report Looks Like for Staff Who Do Not Have Analytics Roles

The screenshot shows a navigation menu for the 'Analytics' section. The menu is displayed in a light blue box with a dark blue header. The header contains the word 'Analytics'. Below the header, there are two main categories: 'Analytics' and 'Reports'. The 'Analytics' category is highlighted with an orange border and contains the link 'Subscribe to Analytics'. The 'Reports' category is also highlighted with an orange border and contains the link 'Data Review Dashboard'. Below these categories, there is a list of links: 'Analytics Objects', 'Analytics Objects List', 'Analytics User Statistics', 'Analytics Citation Attribute Types', and 'Analytics Member Settings'. At the bottom of the menu, there is a grey bar with two columns of text: 'Data available as of: 08/07/2019 24:50:10 CDT' and 'Data updated as of: 08/06/2019 19:00:00 CDT'. Below the grey bar, there is a search icon and the text 'Click here to search for any menu link or press Alt+Ctrl+F'.

Analytics

Analytics
Subscribe to Analytics

Reports
Data Review Dashboard

Analytics Objects
Analytics Objects List
Analytics User Statistics
Analytics Citation Attribute Types
Analytics Member Settings

Data available as of:
08/07/2019 24:50:10 CDT

Data updated as of:
08/06/2019 19:00:00 CDT

Click here to search for any menu link or press Alt+Ctrl+F

Reading a Report

Count of Physical Items by Location Report

Library Name	Location Name	Num of Items (In Repository)
TST Bell Library	Bell Branch Main	13
	UNASSIGNED location	2
TST Bell Library Total		15
TST Branch 1	Branch 1 Main	22
	Branch 1 Reference	4
	Branch 1 Test	1
TST Branch 1 Total		27
TST Branch 2	Branch 2 Main	17
TST Branch 2 Total		17
TST Centennial Library	Centennial Branch	27
TST Centennial Library Total		27
TST Main Library	Borrowing Resource Sharing Requests	127
	Cats Display	1
	Demonstration	1,127
	Display Dog	1
	ILL	9

Live Demo

Sharing Widgets: Analytics > Analytics Objects List

Analytics Configuration and Subscription

1 - 6 of 6

Title ▾



[+ Add New Analytics Object ▾](#)



▼ Type : All ▾ Schedule : All ▾ Status : All ▾ Analytics Source System : All ▾

▲ Title	↕ Description	Type	Schedule	Status	Subscribe
1 Data Review Dashboard	-	Dashboard	-		
2 Expenditures per material type YTD	Expenditures per material type YTD	Widget	-		
3 LEGAL DEPOSIT	Legal Deposit Annual Receipt	Report	-		
4 Number of loans per month last 12 months	Number of loans per month last 12 months	Widget	-		
5 Overdues	-	Report	-		
6 Top 5 vendors spending YTD	Top 5 vendors spending YTD	Widget	-		

Sharing Widget Reports

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 2. [more actions] > Edit/Duplicate/Delete

Creating a New Widget Object

Alma Analytics Object Cancel Save

Acq_widget ▼

Type WIDGET

General Information ▼

Title * Acq_widget

Analytic Folder * Alma/Acquisitions/Dashboards ▼ Name * Acquisitions Dashboard ▼

Type * Widget ▼

Description

Roles ▼

+ Add Role 🔗 ⚙️

▲ Role	▲ Description	
1 Fund Manager	Manages all fund related actions	⋮

What a Shared Widget Report Looks Like for Staff Who Do Not Have Analytics Roles

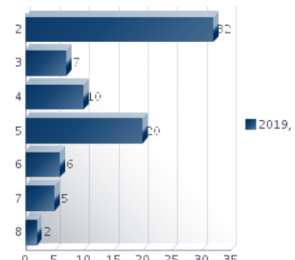
Wednesday, August 7, 2019

Please be advised that Ex Libris will deploy a release update on your Alma production environment from 08/11/2019 02:00:00 CDT to 08/11/2019 03:00:00 CDT. On the release update deploy date you will be able to view the release notes by clicking here for information about the issues resolved in this SP. During this period access to Alma may be unavailable, so please take this into account in your schedule. We apologize for any inconvenience this may cause.

Recent Pages > Find and Manage Users Admin > Analytics Objects List Analytics > Subscribe to Analytics Analytics > Lending Requests Fulfillment > Analytics Member Sett... Analytics

Number of loans per month last 12 months

Open in a new window



Month	Number of Loans
2	32
3	7
4	10
5	20
6	6
7	5
8	2

Notifications

- ★ 4/3/2018 04/30/2018
Not seeing menu options? You may need to add a role. See the full list with descriptions here: [Link](#)
- ★ 4/3/2018 04/30/2018
Advanced Search Indexes (Which MARC fields are searched under which criteria?) [Link](#)
- ★ 4/3/2018 04/30/2018
Want to use hotkeys instead of clicking? Hotkeys cheat sheet is here [Link](#)

Tasks

- 1 Purchase Requests >
- 23 Borrowing Requests >
- 4 Lending Requests >
- 2 Other Requests >
- 4 DARA Recommendations >
- 396 Order Lines >
- 12 Invoices >
- 8 Electronic Resources >

Organization Calendar

Reading a Widget



Live Demo

Sharing Dashboard: Analytics > Analytics Objects List

Analytics Configuration and Subscription

1 - 6 of 6

[+](#) Add New Analytics Object

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Creating a New Dashboard Object

< Alma Analytics Object Cancel Save

cc_acq_dashboard ▼

Type SCH_DASHBOARD

General Information ▼

Title * cc_acq_dashboard

Analytic Folder * Alma/Acquisitions/Dashboards ▼ Name * Acquisitions Dashboard ▼

Type * Scheduled Dashboard ▼

Description

Status * Active Inactive

Schedule * Every Monday at 02:00 ▼ Email Notifications

Roles ▼ + Add Role 📄 ⚙️

▲ Role	▲ Description	
1 Acquisitions Administrator	Manages Acquisitions configurations such as Acquisitions processes	⋮

What a Shared Dashboard Looks Like for Staff Who Do Not Have Analytics Roles

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Subscribe to Analytics

Reports
Data Review Dashboard

Analytics Objects

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🔍 [Click here](#) to search for any menu link or press Alt+Ctrl+F

Reading a Dashboard

Data Review Dashboard

Count of Physical Items by Location | Count of Users by Group | Count of POLs by Status | Count of POLs by Type | Count of POLs by Acq Method

Count of Physical Items by Location Report

Library Name	Location Name	Num of Items (In Repository)
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	ILL	9

Live Demo

Homework: Privacy Concerns – Your Policies

Institutional Policy Decisions – Your Homework

- Who needs access to creating reports?
 - The best report-writers are those that know the data extremely well.
 - All Design Analytics users have access to the full data warehouse, cannot limit what data someone can access.
 - Who will be tasked with creating and sharing reports with other staff?

Institutional Policy Decisions – Your Homework

- How will you determine “official” numbers from reports?
 - It’s very easy to create reports that are not accurate.
 - How will reports be shared across staff?

Survey

Survey and Next Steps

Please have individuals at your library fill out the survey as needed.

This survey is intended for individual staff to complete and is open to all consortium members. Please review this survey in the next few weeks. A response is due by Friday, October 4, if you wish to respond.

The survey gathers important information to help us obtain a baseline of individual experience with Alma Analytics. We will use the feedback from this survey to plan future training on Alma Analytics. Please help us tailor our training to your skills and experience by answering the questions provided.

<https://forms.office.com/Pages/ResponsePage.aspx?id=xscRULQKq0ae9PrnSplafyyWszlQtN5Jmz71TVOVJmtUNzFUUkpHQjBZMDMxMjBXMjRRNUhORTVLTS4u>

Upcoming Presentations & Other Important Dates

Fall 2019

- Where in the world is my data? : (For those not working in Analytics), 9/20
- Survey 1 Deadline, 10/4
- Getting started, know the ABCs, 10/11
- MacGyvering the box, 11/15

Spring 2020

- Training to be announced later

Analytics Cheat Sheet

- Answer 4214: https://pals.custhelp.com/app/answers/detail/a_id/4214



PALS



MINNESOTA STATE

Minnesota State University, Mankato
3022 Memorial Library
Mankato, MN 56001

507-389-2000
877-466-5465

<https://www.mnpals.org>



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