



# PALS

October 11, 2019

Carrie Curie & Etta Thornburg

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## Analytics: Getting Started the ABCs



MINNESOTA STATE

# Agenda

- Analytics Overview
- Data Awareness & Knowing Is Half the Battle
- Building Blocks-Structure/Terms/Vocabulary
- Beginner Level Tour of Alma Analytics
  - Primo v. Alma Analytics
  - Creating Your Own Analytics Subfolders
  - Out-of-the-box
    - Where and How to Use
- Best Practices



# Analytics Overview

# 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 "mode=ajax" on the left, a menu icon, a three-dot menu icon, a shield icon, and a star icon on the right. Below the header, there is a navigation bar with "Analytics" and "TST Main Library - Main Circ Desk". A dropdown menu is open under "Analytics", showing a list of links: "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", and "Overdues". At the bottom of the dropdown menu, there are two grey boxes with orange borders. The left box contains the text "Data available as of: 08/07/2019 24:50:10 CDT". The right box contains the text "Data updated as of: 08/06/2019 19:00:00 CDT". Below these boxes, there is a search bar with the text "Click here to search for any menu link or press Alt+Ctrl+F".

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



Data Awareness & Knowing Is Half the Battle



# Data Awareness

Data is there to help us make decisions, and data awareness 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: What issues or questions do you require information about?

# Knowing Is Half the Battle

- Why: What are your objectives and expectations?

# Knowing Is Half the Battle

- Who: Who requires this information?
- Analytics Objects can be shared by an Analytics Administrator to specific individuals or groups (as defined by staff roles), and do not need to be shared with all staff users

# Knowing Is Half the Battle

- When: When is this information required?
- 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?

# Knowing Is Half the Battle

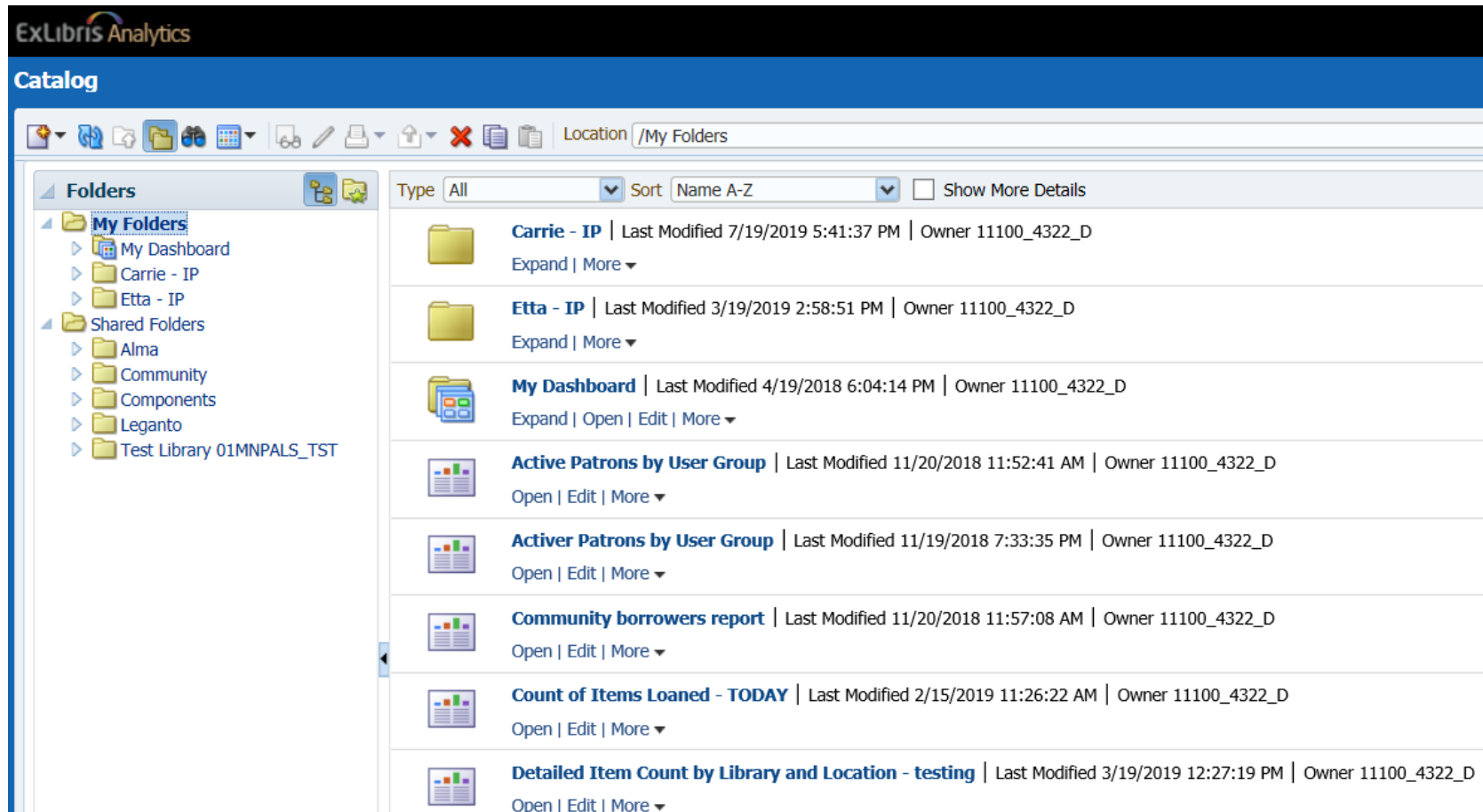
- Where: Where does this data need to ultimately go? Is this information you are using to just monitor things or is this statistical information you are retaining?



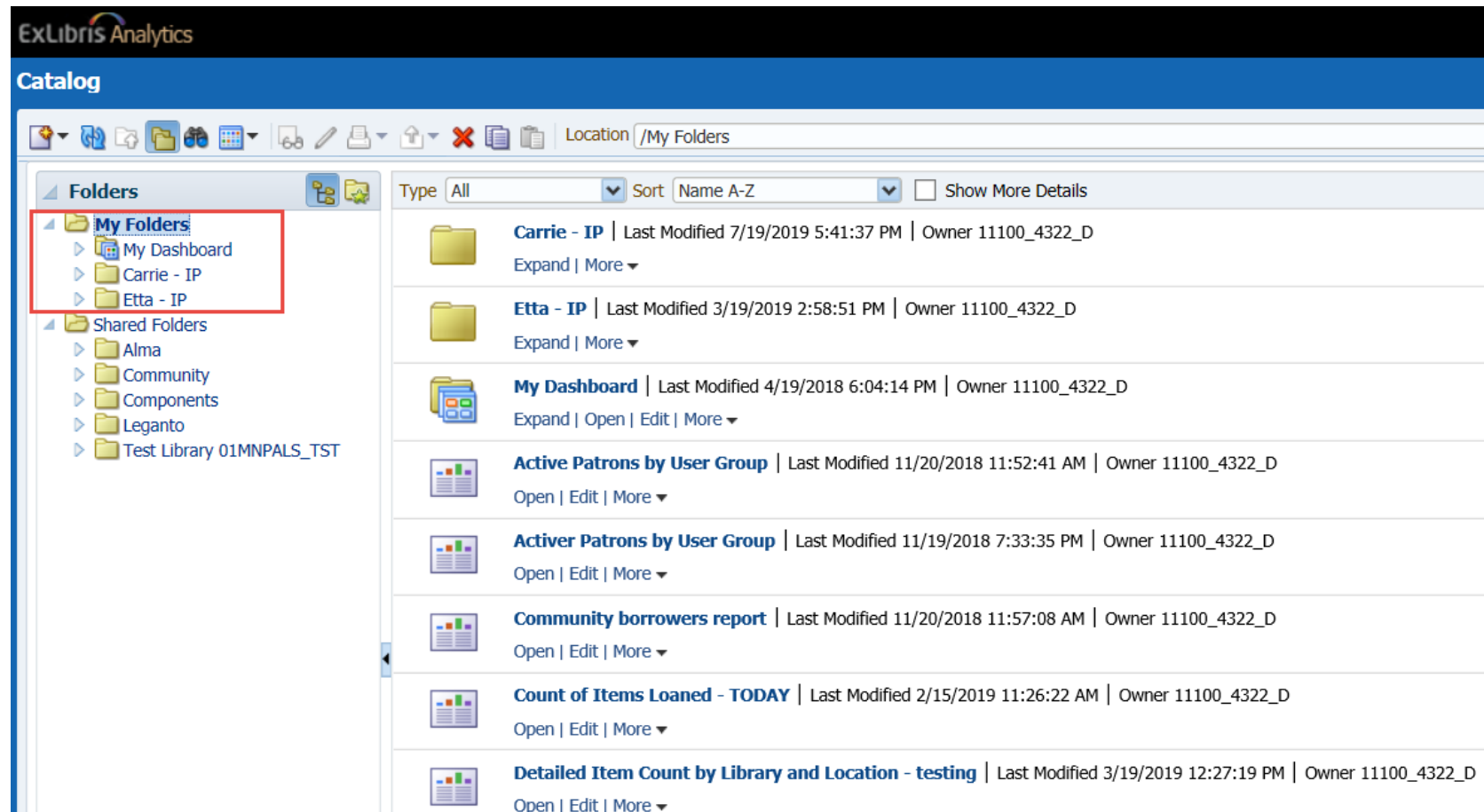
# Building Blocks



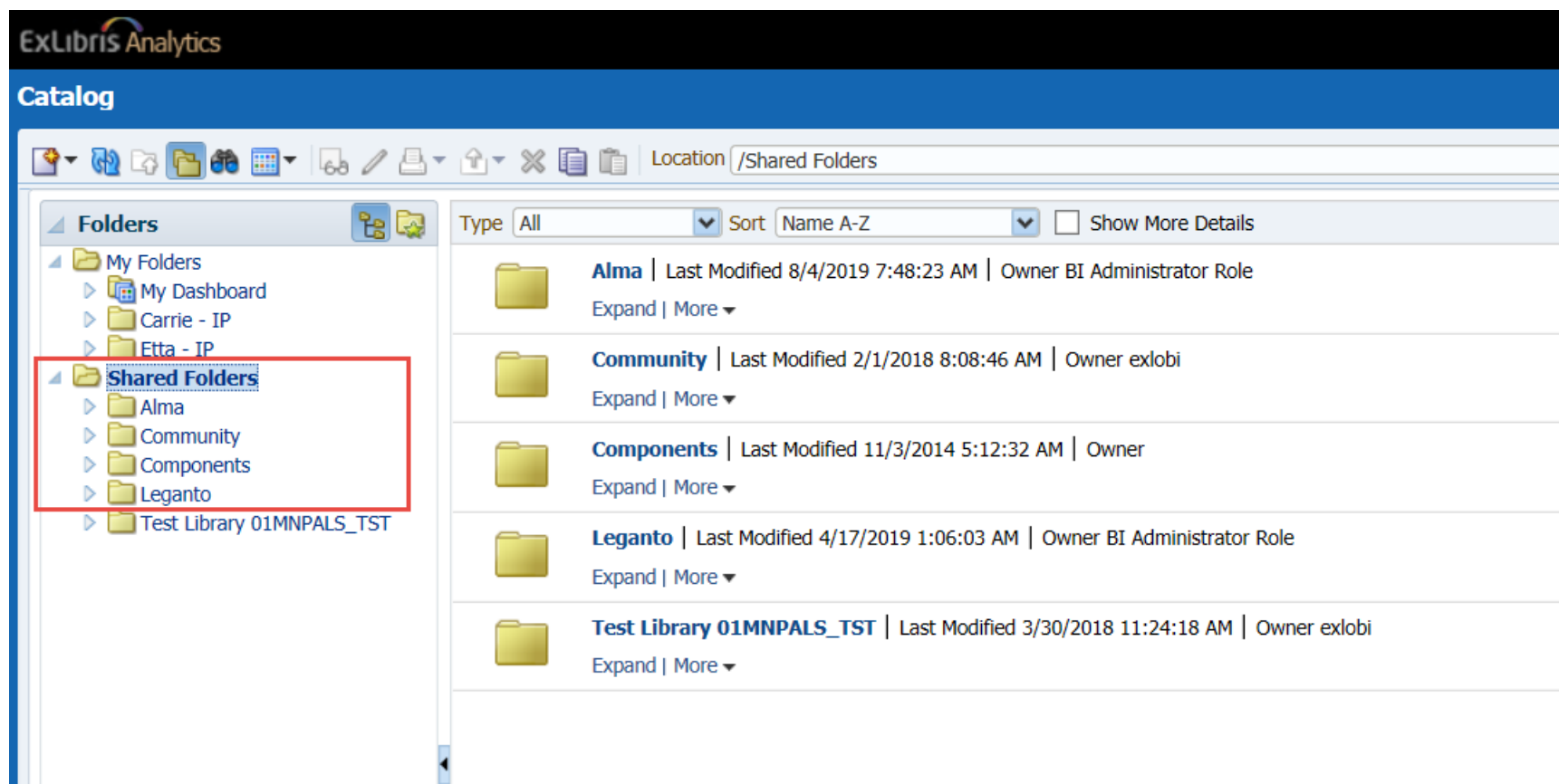
**Catalog:** The directory of folders where previously created analyses are saved.



**My Folder:** The folder where you can store your analyses. It is your personal folder, and is not shared.



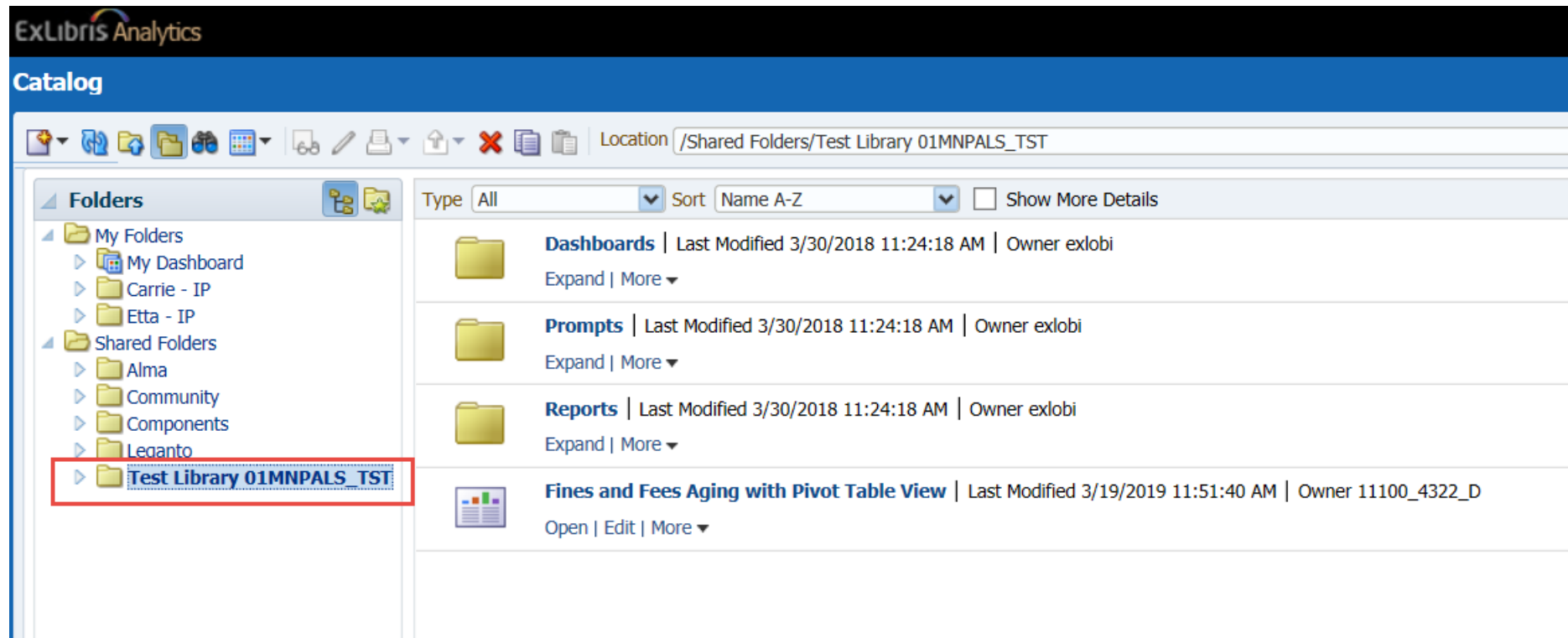
# Shared Folders: The folders where you can find analyses that have been shared with you.



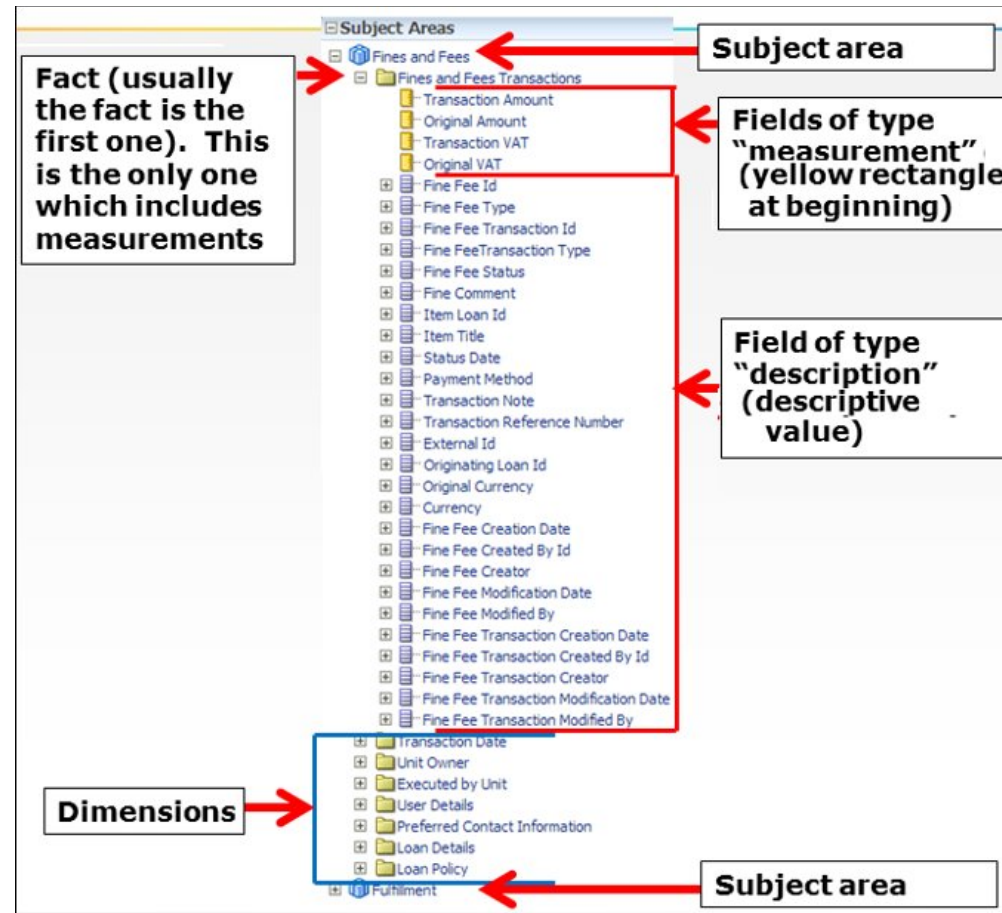
# Shared Folders

- Analyses Shared by the Alma Community and Ex Libris
  - The Alma sub-folder is for reports created by Ex Libris staff
  - The Community folder contains reports from:
    - Individual institutions
    - Consortia
    - Regional User Groups
    - Ex Libris-User Group Work Groups
- There are many reports available

**Institution Folder:** The folder where you can see your institutionally shared analyses. It is one of the Shared Folders, but is only shared by other users at your institution.

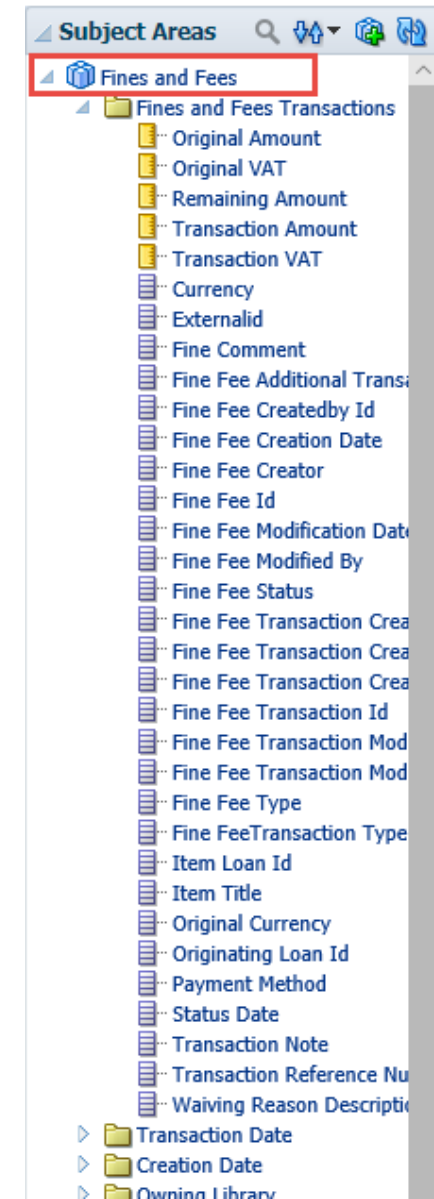


# Analytics Data Breakdown



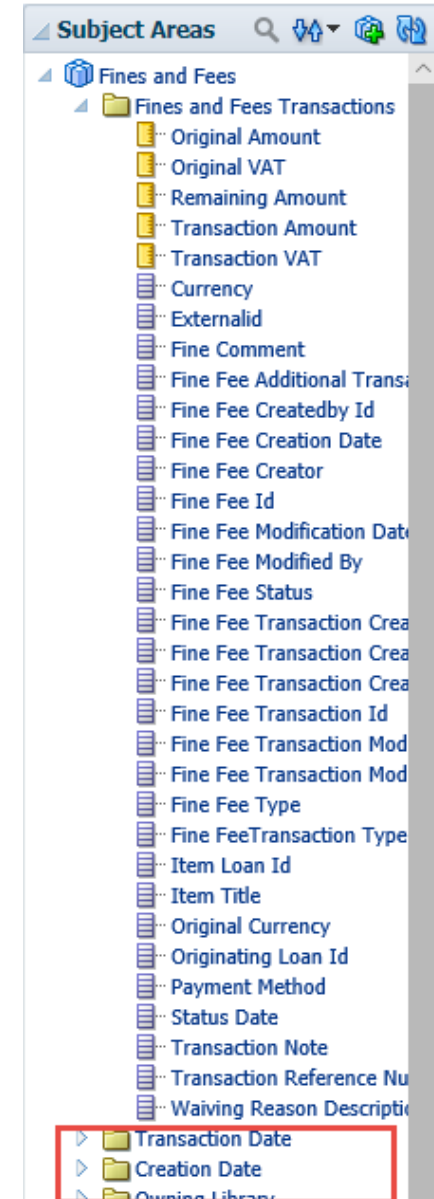
# Subject Area

- Data in Analytics is organized into subject areas such as Funds Expenditure, Fulfillment, Users, Fines and Fees, and Physical Items. Subject areas contain folders, dimensions, and measurement, attribute, and hierarchical columns.



# Dimensions

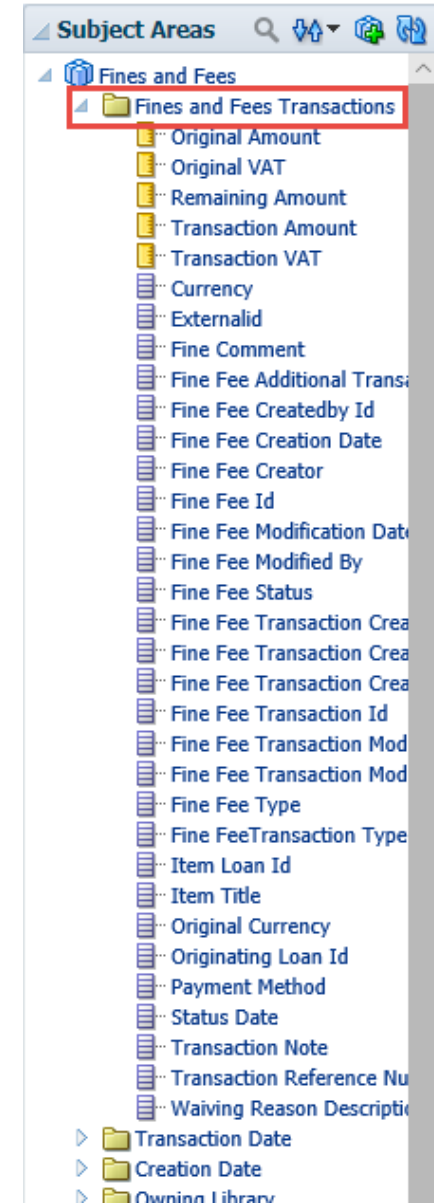
- Tables with descriptive attributes that are typically textual fields such as Library Code, Vendor Name, or Loan Date.





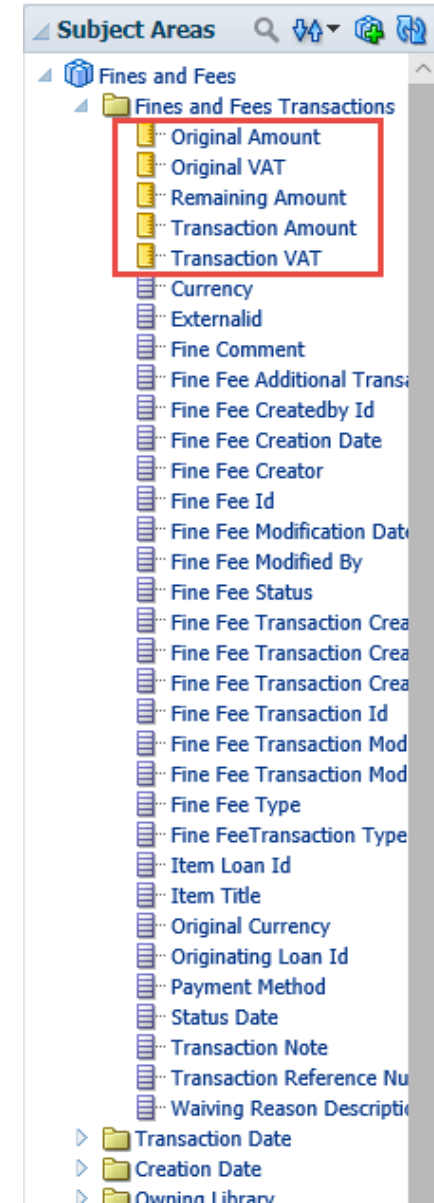
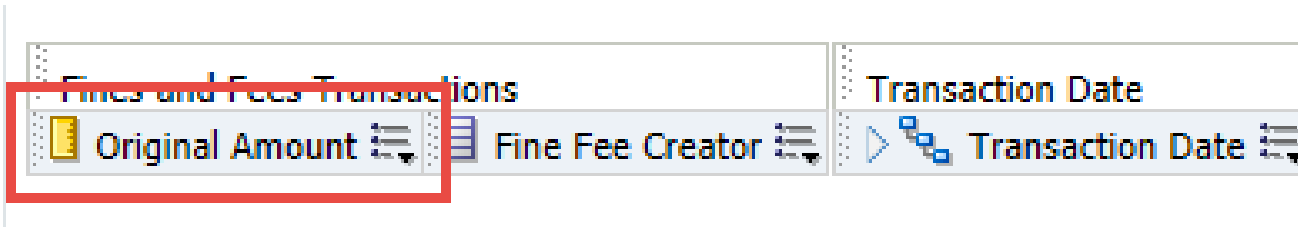
# Fact

- The first dimension for a Subject Area.
- This is where you would find fields of type “measurement” and “description”



# Measurement

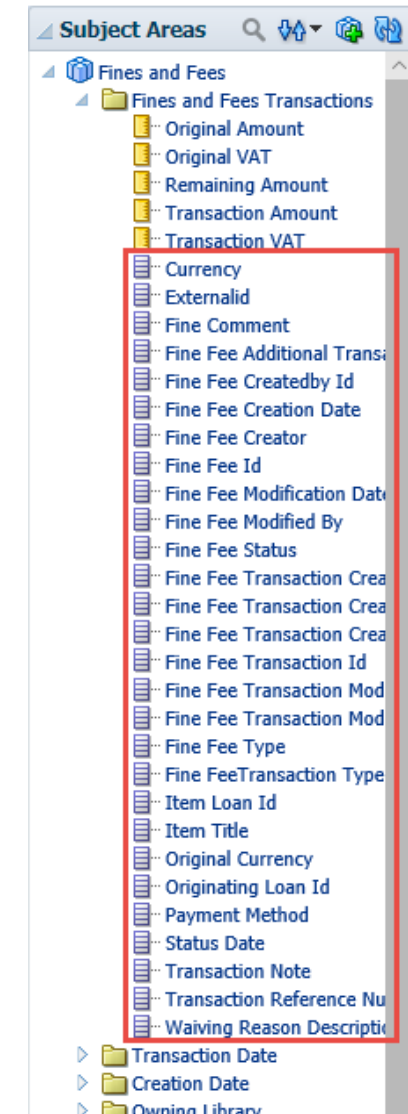
- A column of data that holds a simple list of data values that can change or can be counted in some way.



# Description/Attribute

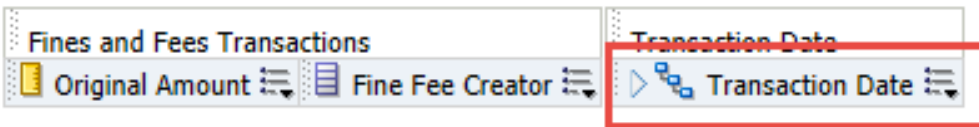
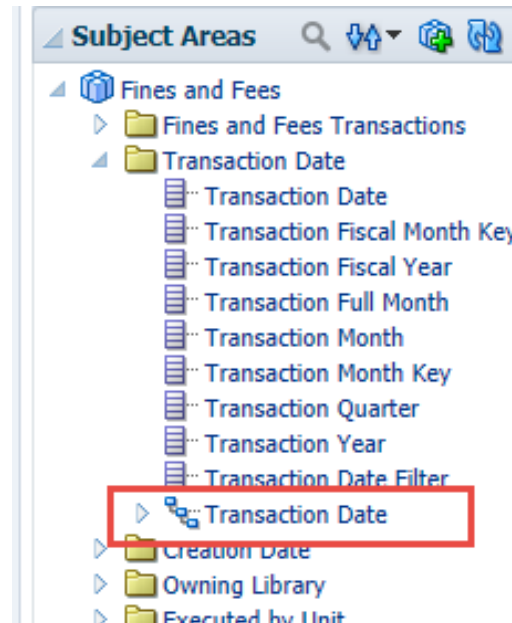
- A column that holds a flat list of values that are also known as members without a hierarchical relationship.

Fines and Fees Transactions		Transaction Date
Original Amount	Fine Fee Creator	Transaction Date



# Hierarchical

- A column that holds data values that are organized using both named levels and parent-child relationships. This column is displayed using a tree-like structure.



# Analysis

This is the basic unit of operations in Analytics. It's the tool to produce reports and graphs from one or more Subject Areas.

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
<b>TST Bell Library Total</b>		<b>15</b>
TST Branch 1	Branch 1 Main	22
	Branch 1 Reference	4
	Branch 1 Test	1
<b>TST Branch 1 Total</b>		<b>27</b>
TST Branch 2	Branch 2 Main	17
<b>TST Branch 2 Total</b>		<b>17</b>
TST Centennial Library	Centennial Branch	27
<b>TST Centennial Library Total</b>		<b>27</b>
TST Main Library	Borrowing Resource Sharing Requests	128
	Cats Display	1
	Demonstration	1
		1 127

# Dashboard

A display that can contain one or more pages with reports, graphs, and external content. It is dynamic and can include prompts for filters.



## Filters & Dashboard Prompts

Filters can be saved as standalone objects to reuse in multiple analysis. This is helpful when working with complex filters with multiple criteria. Similarly, dashboard prompts - like a list of fiscal years - are created separately from analysis and then used as needed.

**Definition**

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Material Type	Column value	Material Type			<input type="checkbox"/>

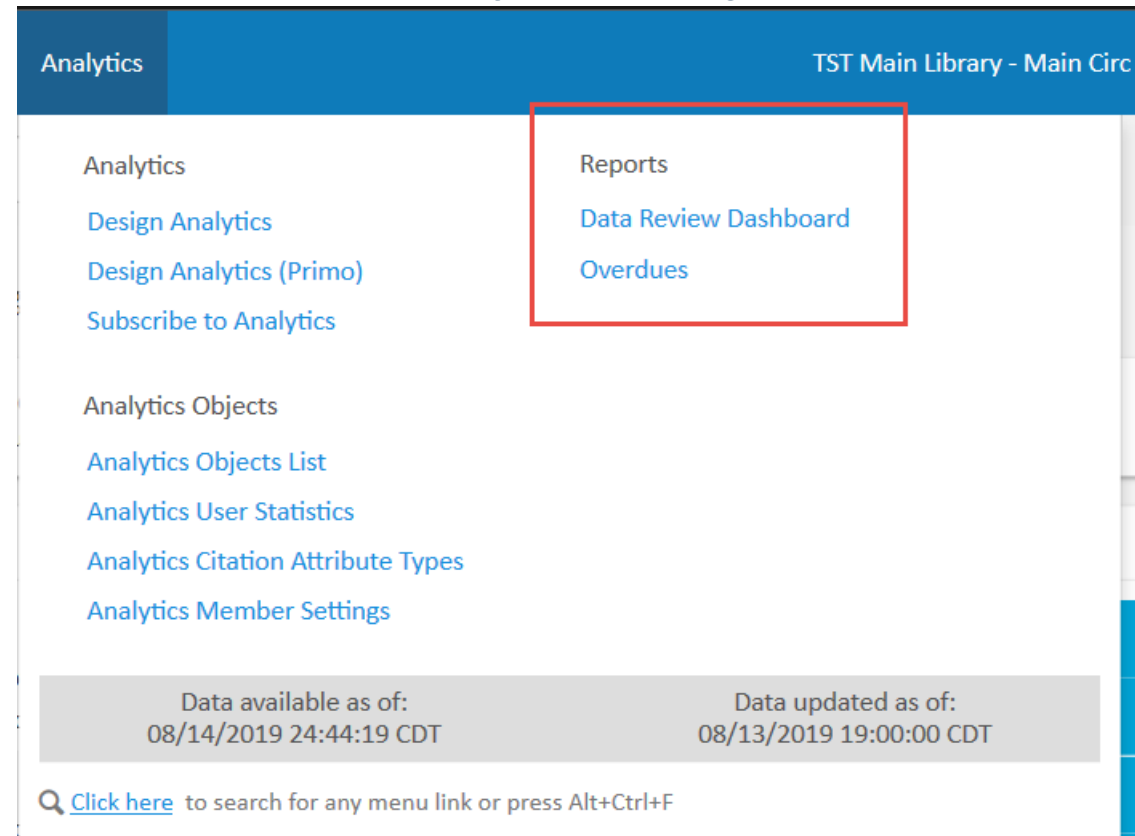
**Display**

Page 1

Material Type --Select Value--  
Apply Reset ▾

# Analytics Objects

Alma can directly link to analysis and dashboards after they have been loaded into the system as an “Analytics Object”.







# Beginner Level Tour of Alma Analytics

# Tour of Analytics - Tips

- Add a sub-folder in your institutional folder to hold the analyses we will create
- If more than one person from your institution is participating in today's training, determine a naming convention (e.g. initials or name to start each saved analysis name)-or save your drafts in your individual folder, not the institutional folder
- Alma and Primo Analytics are separate-choose the one you want to go to from Alma

# Many Reports Are Already Available

The image displays two screenshots of the ExLibris Analytics Catalog interface, illustrating the variety of reports available. Both screenshots show a hierarchical folder structure on the left and a list of reports on the right.

**Left Screenshot:** The 'Reports' folder is selected under 'Alma' > 'Shared Folders'. The list of reports includes:

- Analytics Issues Report | Last Modified 5/24/...
- Detailed Expenditures | Last Modified 10/16/...
- Expenditure Per Acquisition Method | Last Modified...
- Expenditure Per Acquisition Method - Annual...
- Expenditure Per Acquisition Method - Top 10...
- Expenditure Per Classifications | Last Modified...
- Expenditure Per Classifications - Top 10 | Last Modified...
- Expenditure Per Fund Ledger Code | Last Modified...
- Expenditure Per Fund Ledger Code - Top 10 | Last Modified 10/16/2018 6:16:28 AM | Owner
- Expenditure per Fund Ledger Transaction Type | Last Modified 10/31/2017 4:36:12 AM | Owner

**Right Screenshot:** The 'Reports' folder is selected under 'Alma' > 'Shared Folders'. The list of reports includes:

- Count of Items Loaned - Top 10 | Last Modified 6/21/2016 8:08:59 AM | Owner
- Annual Count of Loans and Renewals | Last Modified 3/27/2017 3:59:35 AM | Owner
- Circulation Notes | Last Modified 8/4/2019 7:48:18 AM | Owner
- Circulation Statistics by Item Policy | Last Modified 8/4/2019 7:48:18 AM | Owner
- Count of Items Loaned | Last Modified 8/4/2019 7:48:18 AM | Owner
- Count of Items Loaned by Patron Group | Last Modified 8/4/2019 7:48:18 AM | Owner
- Count of Items Loaned by Patron Group - pie | Last Modified 8/4/2019 7:48:18 AM | Owner
- Fines and Fees - Pivot Table | Last Modified 8/4/2019 7:48:18 AM | Owner
- General Circulation Statistics | Last Modified 8/4/2019 7:48:18 AM | Owner
- High ratio loans to number of items example 1 | Last Modified 8/6/2018 11:10:12 AM | Owner  
Combines "Fulfillment" and "Physical Items" subject areas
- High ratio loans to number of items example 2 | Last Modified 8/6/2018 11:10:18 AM | Owner  
Combines "Fulfillment" and "Physical Items" subject areas

# Errors Indicating You Need to Copy a Report

JavaScript error because of prompt

# Errors Indicating You Need to Copy a Report



Copy Link requires [Adobe Flash Player](#).

# Errors Indicating You Need to Copy a Report

No results because of an Oracle driver error



## Error

### View Display Error

Odbc driver returned an error (SQLExecDirectW).

#### Error Details

Error Codes: OPR4ONWY:U9IM8TAC:OI2DL65P

State: HY000. Code: 10058. [NQODBC] [SQL\_STATE: HY000] [nQSError: 10058]

A general error has occurred. [nQSError: 43113] Message returned from OBIS.

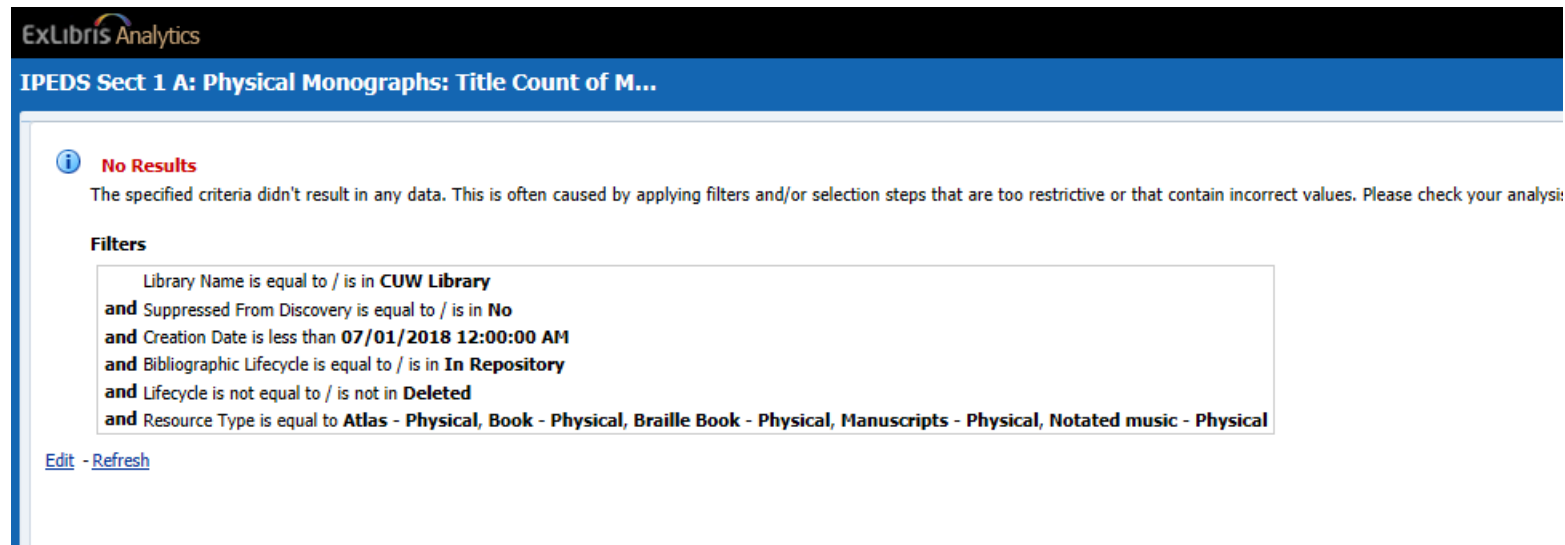
[nQSError: 43119] Query Failed:

Please have your System Administrator look at the log for more details on this error. (HY000)

SQL Issued: SELECT 0 s\_0, SUBSTRING("Funds Expenditure"."Vendor"."Vendor Name" FROM 1 FOR 20) s\_1, "Funds Expenditure"."Fund Transactions"."Transaction Amount" s\_2 FROM "Funds Expenditure" WHERE (("Fund Transaction Details"."Transaction Item Type" = 'EXPENDITURE') AND (TOPN("Fund Transactions"."Transaction Amount",5) <= 5) AND (("Periods"."Fiscal Year Key" IN (Year(Current\_Date) )))) FETCH FIRST 250001 ROWS ONLY

# Errors Indicating You Need to Copy a Report

Specified criteria didn't result in any data because the library/institution specific information is for another library/institution



**ExLibris Analytics**

**IPEDS Sect 1 A: Physical Monographs: Title Count of M...**

**No Results**

The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis:

**Filters**

- Library Name is equal to / is in **CUW Library**
- and Suppressed From Discovery is equal to / is in **No**
- and Creation Date is less than **07/01/2018 12:00:00 AM**
- and Bibliographic Lifecycle is equal to / is in **In Repository**
- and Lifecycle is not equal to / is not in **Deleted**
- and Resource Type is equal to **Atlas - Physical, Book - Physical, Braille Book - Physical, Manuscripts - Physical, Notated music - Physical**

[Edit](#) - [Refresh](#)



# Best Practices

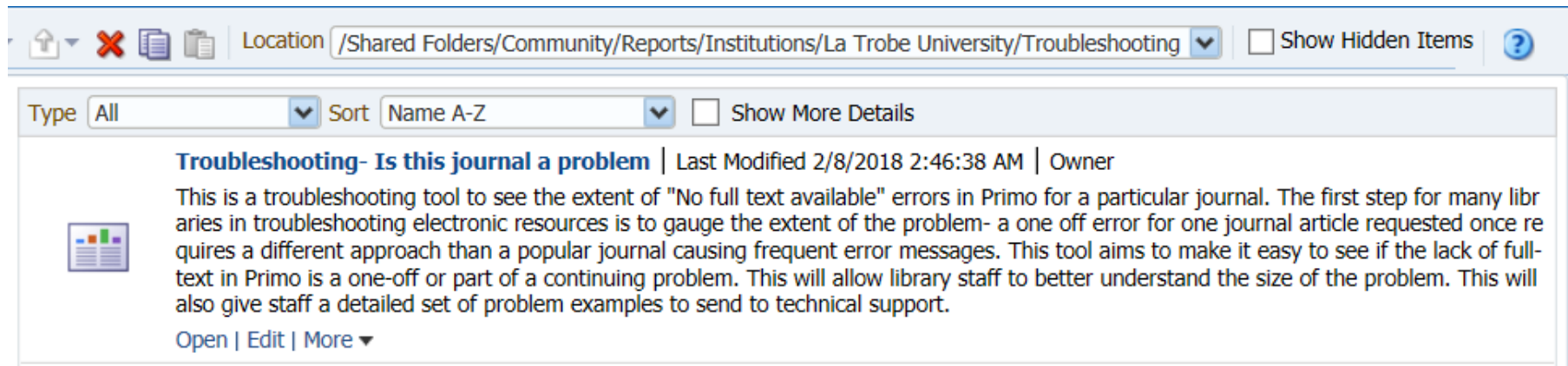


# Best Practices for Working with Community Contributions

- Analyses found here will run against your institution's data, so look at and run freely
- Please **DO NOT** modify any analyses in the Community folder
- Use the **Copy** and **Paste** functions to make a local copy or **Save As** to your institution's folders

# Best Practices for Sharing an Analysis/Dashboard with the Community (or even within your own institution)

- Have a clear title
- Include a full description to complement the information in the title



# Other Analytics Tools

- Primo and Summon Analytics show how your users interact with discovery
- The new DARA tool in Alma can help make recommendations for maximizing configuration options.
- The native Alma Advanced Search can quickly isolate certain records.

# Upcoming Presentations & Other Important Dates

## Fall 2019

- 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](https://pals.custhelp.com/app/answers/detail/a_id/4214)

# Alma Analytics Documentation

- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma Online Help \(English\)/080Analytics](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics)
- [https://knowledge.exlibrisgroup.com/Alma/Training/Extended Training/Alma Analytics](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Alma_Analytics)
- [https://knowledge.exlibrisgroup.com/Alma/Training/Extended Training/Presentations and Documents - Analytics](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Analytics)
- [https://knowledge.exlibrisgroup.com/Cross\\_Product/Conferences and Seminars/Technical Seminar/0402018 Technical Seminar](https://knowledge.exlibrisgroup.com/Cross_Product/Conferences_and_Seminars/Technical_Seminar/0402018_Technical_Seminar)
- [https://knowledge.exlibrisgroup.com/Alma/Training/Extended Training/Presentations and Documents - APIs](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_APIs)
- Primo Analytics
- [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/Analytics/050Common Primo Analytics Procedures](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Analytics/050Common_Primo_Analytics_Procedures)
- [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/Analytics/040Subject Areas](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Analytics/040Subject_Areas)

# Alma Analytics Recordings

- Sharai Perkes “Introduction to Alma Analytics” webinar
  - Streaming recording link:  
<https://proquestmeetings.webex.com/proquestmeetings/ldr.php?RCID=d380c2e673aca66aaef7349b676b4639>
  - Download recording link:  
<https://proquestmeetings.webex.com/proquestmeetings/lsr.php?RCID=9cb4097afbcaac9a18f5deb2f6124488>



# 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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