



PALS

November 15, 2019

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Analytics: MacGyvering the Box



MINNESOTA STATE

Agenda

- Basic Adapting Out of the Box Analyses
- Creating a Basic Analysis
- Data Awareness Reminders
- Helpful Tools

Basic Adapting Out of the Box Analyses

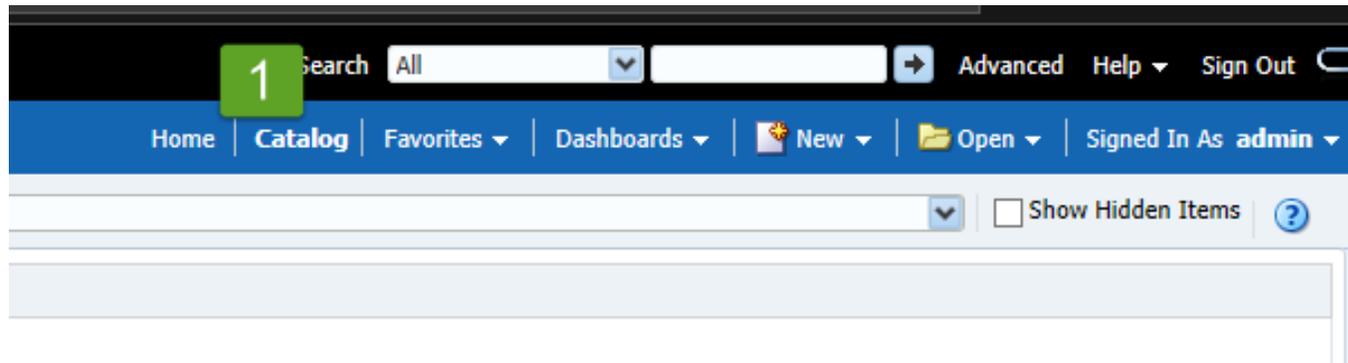
Analytics - Tips

- 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

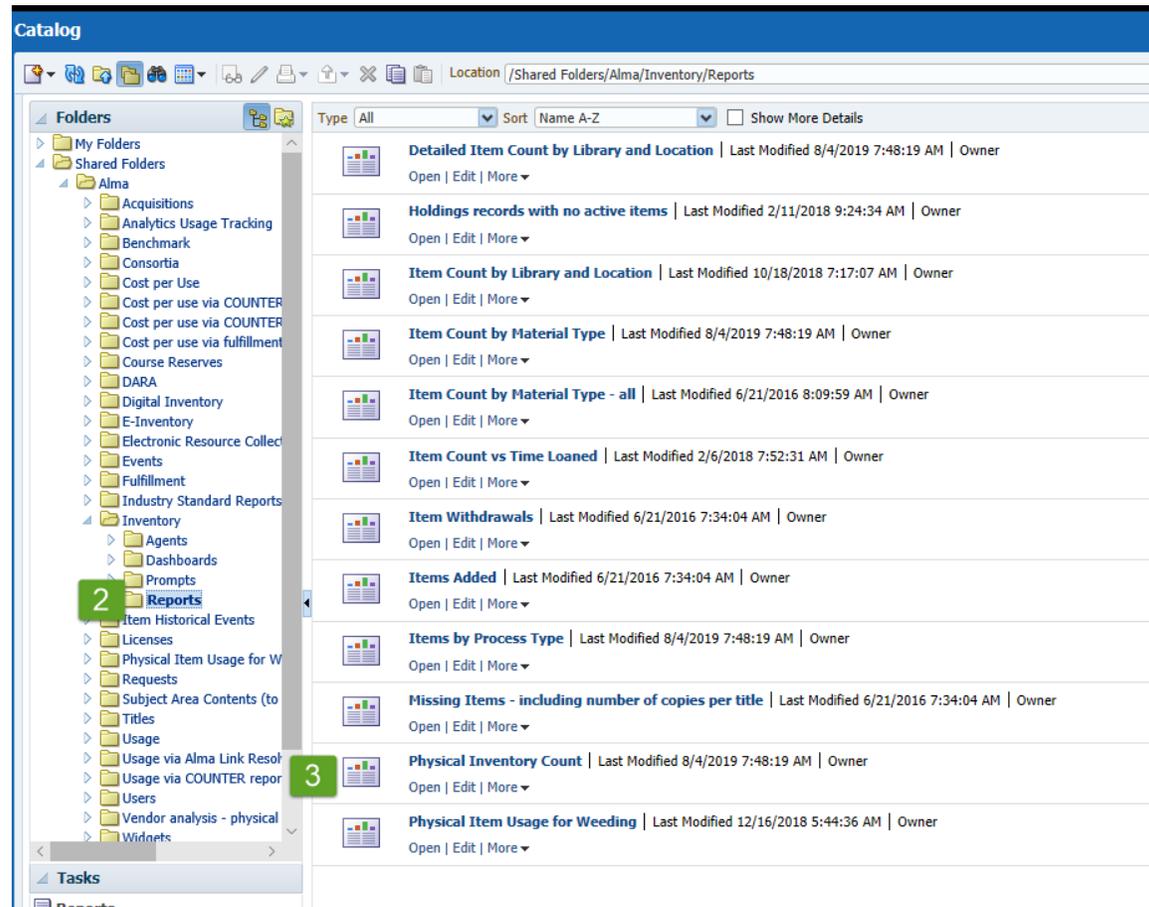
Customizing - "Physical Inventory Count"

- Found in Shared folders > Alma > Inventory > Reports subfolder

Opening the Catalog



Navigate to the Shared Folders > Alma > Inventory > Reports Subfolder and Find the “Physical Inventory Count” Analysis



Select and Copy the Analysis

The screenshot displays a library system interface. On the left, a navigation pane shows a tree view of folders including 'Physical Item Usage for w', 'Requests', 'Subject Area Contents (to', 'Titles', 'Usage', 'Usage via Alma Link Resol', 'Usage via COUNTER repor', 'Users', 'Vendor analysis - physical', and 'Widgets'. Below this is a 'Tasks' section with a list of actions for the selected report: 'Open', 'Copy', 'Edit', 'Rename', 'Print', 'Add to Favo', 'Export', 'Create Shor', 'Add to Briefing Book', 'Properties', 'Schedule', and 'Permissions'. A green box with the number '5' highlights the 'Copy' option.

The main content area shows a list of reports. A green box with the number '4' highlights the 'Physical Inventory Count' report, which is selected. The report details are: 'Physical Inventory Count | Last Modified 8/4/2019 7:48:19 AM | Owner'. Below it, another report is visible: 'Physical Item Usage for Weeding | Last Modified 12/16/2018 5:44:36 AM | Owner'. At the bottom of the interface, a preview bar shows 'Preview: Physical Inventory Count'.

Navigate to Your Working Folder and Paste the Analysis

The screenshot shows a file explorer interface with a left-hand pane for navigation and a main pane for file details. The left pane is divided into 'Folders' and 'Tasks' sections. In the 'Folders' section, a green box with the number '6' highlights the 'Carrie - IP' folder. Below it, a context menu is open, and a green box with the number '7' highlights the 'Paste' option. The main pane displays a list of files and folders, sorted by name. A green box with the number '8' highlights a star icon next to the file 'Physical Inventory Count'. The file list includes titles, last modified dates, and owners. The 'Physical Inventory Count' file is the most recent, dated 8/4/2019.

Type	Sort	Show More Details
All	Name A-Z	<input type="checkbox"/>
	Cataloger Activity - 41BC0	Last Modified 9/9/2018 3:31:01 AM Owner 11100_4322_D
Open Edit More ▾		
	cataloger stats test - USG - Stats Reporting	Last Modified 6/7/2018 7:11:09 AM Owner 11100_4322_D
Filter by user ID in the Creator column. Testing for potential use by catalogers for their individual stats reporting- data seems neither complete nor specific enough. Created by simon@uga.edu		
Open Edit More ▾		
	Cataloging Activity Bibs	Last Modified 2/8/2018 2:47:16 AM Owner 11100_4322_D
Open Edit More ▾		
	Code tables and mapping tables updated by members and network in last month - inst-shared reports - expert services - analytics - nZ	Last Modified 2/8/2018 2:50:32 AM Owner 11100_4322_D
Open Edit More ▾		
	Ext. Operator Activity Across Functional Areas - Iowa Institutions	Last Modified 2/8/2018 2:46:37 AM Owner 11100_4322_D
Open Edit More ▾		
	Ext. Operator Activity Across Functional Areas - Pivot Table	Last Modified 2/8/2018 2:46:37 AM Owner 11100_4322_D
Open Edit More ▾		
	Items Received/Cataloged - CalState Analytics and Assessment	Last Modified 3/2/2018 1:14:01 PM Owner 11100_4322_D
for Prod Stats page 1 Physical by Mat type, Location		
Open Edit More ▾		
	Troubleshooting- Is this journal a problem - La Trobe University	Last Modified 2/8/2018 2:46:38 AM Owner 11100_4322_D
This is a troubleshooting tool to see the extent of "No full text available" errors in Primo for a particular journal. The first step for many libraries in troubleshooting electronic resources is to gauge the extent of the problem- a one off error for one journal article requested once requires a different approach than a popular journal causing frequent error messages. This tool aims to make it easy to see if the lack of full-text in Primo is a one-off or part of a continuing problem. This will allow library staff to better understand the size of the problem. This will also give staff a detailed set of problem examples to send to technical support.		
Open Edit More ▾		
	Physical Inventory Count	Last Modified 8/4/2019 7:48:19 AM Owner 11100_4322_D
Open Edit More ▾		

Begin Editing

Open | Edit | More ▾

 **Physical Inventory Count** | Last Modified 8/4/2019 7:48:19 AM | Owner 11100_4322_D

Open | Edit | **9**

Criteria **Results** Prompts Advanced

10 Object Areas

- Physical Items
 - Physical Item Details
 - Holding Details
 - Item Creation Date
 - Item Modification Date
 - Library Unit
 - Location
 - Temporary Location
 - Bibliographic Details
 - LC Classifications
 - Dewey Classifications
 - PO Line
 - Fund Information
 - Institution

Compound Layout

Title  

Physical Inventory Count
Total number of items broken down by material type
Time run: 8/14/2019 3:43:50 PM

Table  

Material Type	Number of Items
Book	7,971
Computer file	1,253
Journal	2,120
Map	8
Mixed material	2
Music	113
Unknown	1
Visual material	88
Grand Total	11,556

[Add to Briefing Book](#)

Filter Columns

- Lifecycle: change to deleted

The screenshot shows the ExLibris Analytics interface for a Physical Inventory Count. The left pane lists Subject Areas, including Physical Items, Holding Details, Item Creation Date, Item Modification Date, Library Unit, Location, Temporary Location, Bibliographic Details, LC Classifications, Dewey Classifications, PO Line, Fund Information, and Institution. The right pane shows Selected Columns (Bibliographic Details, Physical Item Details, Material Type, Number of Items) and Filters. A filter is applied: Lifecycle is not equal to / is not in Deleted. A green box with the number 11 highlights the filter configuration area.

The Edit Filter dialog box shows the configuration for the filter. The Column is Lifecycle, the Operator is is equal to / is in, and the Value is Deleted. A green box with the number 12 highlights the Operator dropdown. Below the dialog, a green box with the number 13 highlights the OK and Cancel buttons.

Filter Columns

- Lifecycle filter change updates Results to show deleted items

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in

Lifecycle is equal to / is in Deleted 14

AND Material Type is prompted

Title

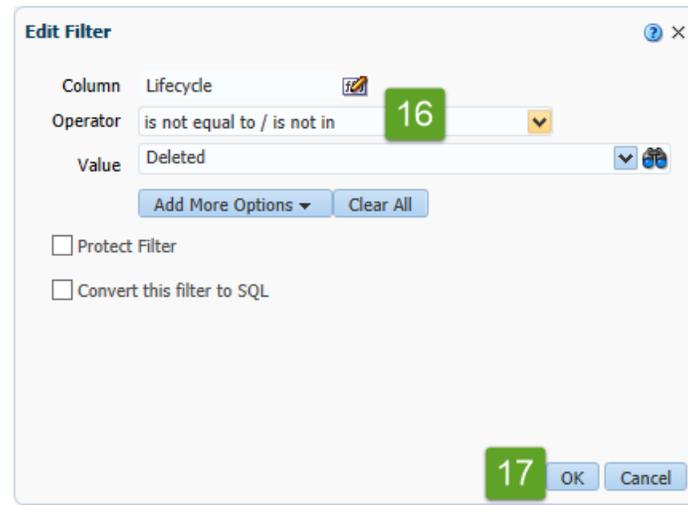
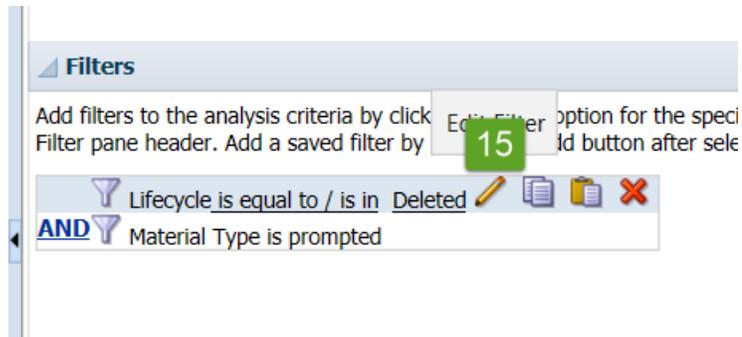
Physical Inventory Count
Total number of items broken down by material type
Time run: 8/14/2019 3:56:00 PM

Table

Material Type	Number of Items
Book	116
Journal	12
Music	2
Grand Total	130

Filter Columns

- Lifecycle: change back to not deleted items



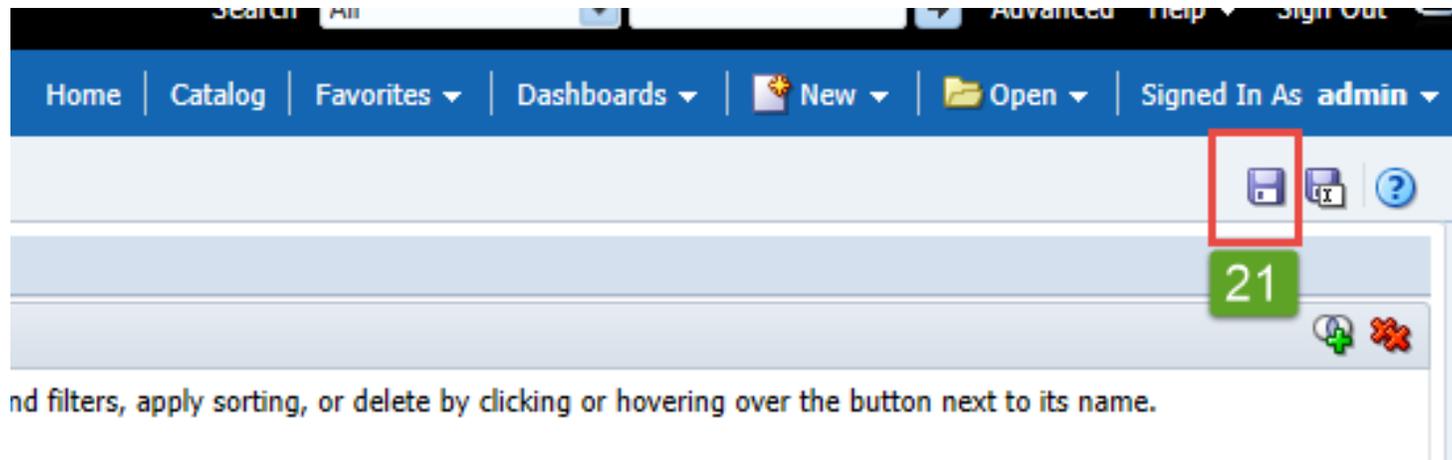
Add Columns

- Location and Library

The screenshot shows the PALS interface with the 'Subject Areas' pane on the left and the 'Selected Columns' pane on the right. In the 'Subject Areas' pane, the 'Location' folder is expanded, and 'Library Name' (20) and 'Location Name' (19) are highlighted with red boxes. The 'Selected Columns' pane shows two columns: 'Bibliographic Details' with 'Material Type' and 'Physical Item Details' with 'Number of Items'. Below this is the 'Filters' section with two active filters: 'Lifecycle is not equal to / is not in Deleted' and 'Material Type is prompted'.

This screenshot shows the 'Selected Columns' pane with four columns: 'Bibliographic Details' (Material Type), 'Physical Item Details' (Number of Items), 'Location' (Location Name), and 'Library Name'. The 'Location' and 'Library Name' columns have green star icons next to them, indicating they are selected or highlighted.

Save Your Analysis!



Moving a Column in the View Screen

- Library to before Location

Physical Inventory Count

Criteria Results Prompts Advanced

Subject Areas

- Physical Items
 - Physical Item Details
 - Holding Details
 - Item Creation Date
 - Item Modification Date
 - Library Unit
 - Location
 - Temporary Location
 - Bibliographic Details
 - LC Classifications
 - Dewey Classifications
 - PO Line
 - Fund Information
 - Institution

Compound Layout

Title

Physical Inventory Count
Total number of items broken down by material type
Time run: 8/14/2019 4:04:24 PM

Table

Material Type	Number of Items	Location Name	Library Name
Book	2	Bell Branch Main	TST Bell Library
	47	Borrowing Resource Sharing Requests	TST Main Library
	22	Branch 1 Main	TST Branch 1
	4	Branch 1 Reference	TST Branch 1
	17	Branch 2 Main	TST Branch 2
	1	Cats Display	TST Main Library
	26	Centennial Branch	TST Centennial Library
	354	Demonstration	TST Main Library
	1	Display Dog	TST Main Library
	8	ILL	TST Main Library
	11	Juvenile	TST Main Library
	7,220	Main Collection	TST Main Library
	1	None	TST Main Library
	42	PALS Office	TST Main Library
	2	PALS Office Ref	TST Main Library
	1	PALS Office Test	TST Main Library
	2	Ref Demonstration	TST Main Library
	94	Reference	TST Main Library
	59	Reserves	TST Main Library
	2	Taschenbucher	TST Main Library
	1	Test Demonstration	TST Main Library
	9	Test Main	TST Main Library
	?	UNASSIGNED location	TST Bell Library

Add to Briefing Book

Compound Layout

Title

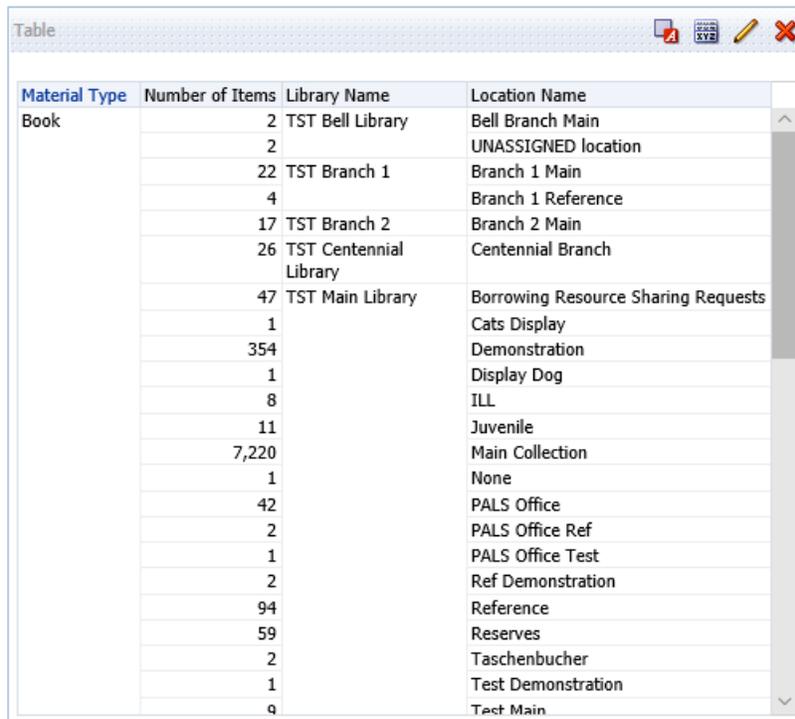
Physical Inventory Count
Total number of items broken down by material type
Time run: 8/14/2019 4:04:24 PM

Table

Material Type	Number of Items	Location Name	Library Name
Book	2	Bell Branch Main	TST Bell Library
	47	Borrowing Resource Sharing Requests	TST Main Library
	22	Branch 1 Main	TST Branch 1
	4	Branch 1 Reference	TST Branch 1
	17	Branch 2 Main	TST Branch 2
	1	Cats Display	TST Main Library
	26	Centennial Branch	TST Centennial Library
	354	Demonstration	TST Main Library
	1	Display Dog	TST Main Library
	8	ILL	TST Main Library
	11	Juvenile	TST Main Library
	7,220	Main Collection	TST Main Library
	1	None	TST Main Library
	42	PALS Office	TST Main Library
	2	PALS Office Ref	TST Main Library
	1	PALS Office Test	TST Main Library
	2	Ref Demonstration	TST Main Library
	94	Reference	TST Main Library
	59	Reserves	TST Main Library
	2	Taschenbucher	TST Main Library
	1	Test Demonstration	TST Main Library

Moving a Column in the View Screen

- The results of dragging Library to before Location



Material Type	Number of Items	Library Name	Location Name
Book	2	TST Bell Library	Bell Branch Main
	2		UNASSIGNED location
	22	TST Branch 1	Branch 1 Main
	4		Branch 1 Reference
	17	TST Branch 2	Branch 2 Main
	26	TST Centennial Library	Centennial Branch
	47	TST Main Library	Borrowing Resource Sharing Requests
	1		Cats Display
	354		Demonstration
	1		Display Dog
	8		ILL
	11		Juvenile
	7,220		Main Collection
	1		None
	42		PALS Office
	2		PALS Office Ref
	1		PALS Office Test
	2		Ref Demonstration
	94		Reference
	59		Reserves
	2		Taschenbucher
	1		Test Demonstration
	9		Test Main

Delete a column

ExLibris Analytics

Physical Inventory Count

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Criteria Results Prompts Advanced

Subject Areas

- Physical Items
 - Physical Item Details
 - Holding Details
 - Item Creation Date
 - Item Modification Date
 - Library Unit
 - Location
 - Library Code
 - Library Name**
 - Location Code
 - Location Name
 - Campus Code
 - Campus Name
 - Library Description
 - Location Type
 - Campus Description
 - Call Number Type
 - External Name
 - Remote Storage Code
 - Temporary Location
 - Bibliographic Details
 - LC Classifications
 - Dewey Classifications
 - PO Line
 - Fund Information

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to the Selected Columns pane, or

Bibliographic Details Physical Item Details Location Library Name

Material Type Number of Items Location Name Library Name

26

Sort

Edit formula

Copy Properties

Delete

27

Save Column As

Filters

Add filters to the analysis criteria by clicking on Filter option for the selected column in the Subject Areas pane, or

AND Lifecycle is not equal to / is not in Deleted

AND Material Type is prompted

Physical Inventory Count

28

Criteria Results Prompts Advanced

Subject Areas

- Physical Items
 - Physical Item Details
 - Holding Details
 - Item Creation Date
 - Item Modification Date
 - Library Unit
 - Location
 - Temporary Location
 - Bibliographic Details
 - LC Classifications
 - Dewey Classifications
 - PO Line
 - Fund Information
 - Institution

Compound Layout

Title

Physical Inventory Count

Total number of items broken down by material type

Time run: 8/14/2019 4:18:55 PM

Table

Material Type	Number of Items	Library Name
Book	4	TST Bell Library
	26	TST Branch 1
	17	TST Branch 2
	26	TST Centennial Library
Computer file	7,898	TST Main Library
	1,253	TST Main Library
Journal	0	TST Centennial Library
	2,120	TST Main Library
Map	8	TST Main Library
Mixed material	2	TST Main Library
Music	1	TST Bell Library
Unknown	112	TST Main Library
Visual material	1	TST Main Library
Visual material	0	TST Centennial Library
Visual material	88	TST Main Library
Grand Total	11,556	

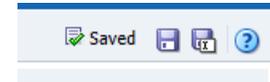
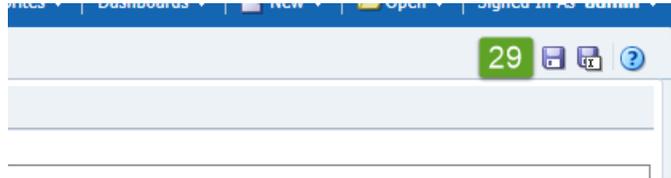
Catalog

List All

- My Folders
- Shared Folders

Add to Briefing Book

Save Your Analysis!

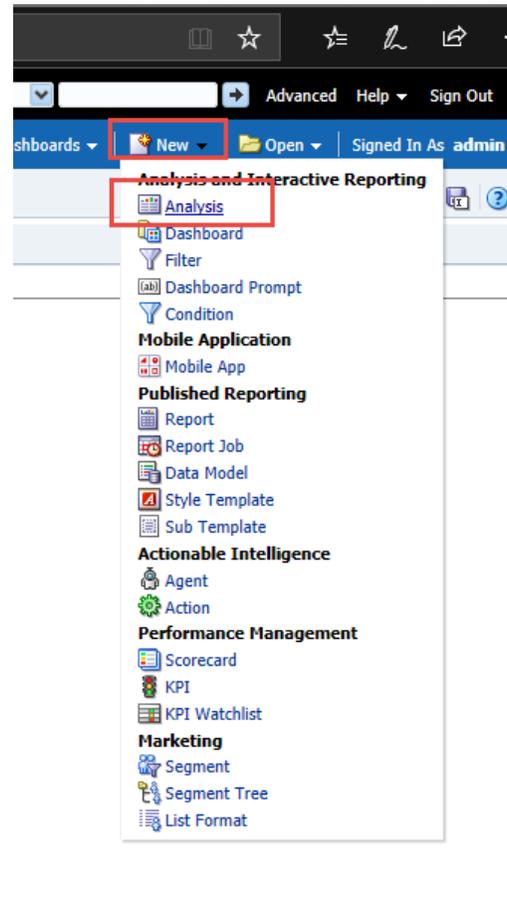


Creating a Basic Analysis

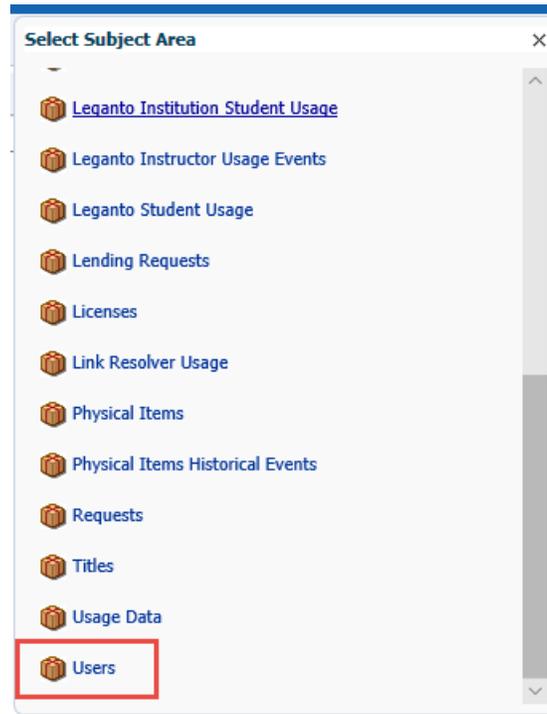
Getting Started with a New Analysis

- Start with a basic user report showing notes, then convert it to count users with specific notes

Creating a New Analysis



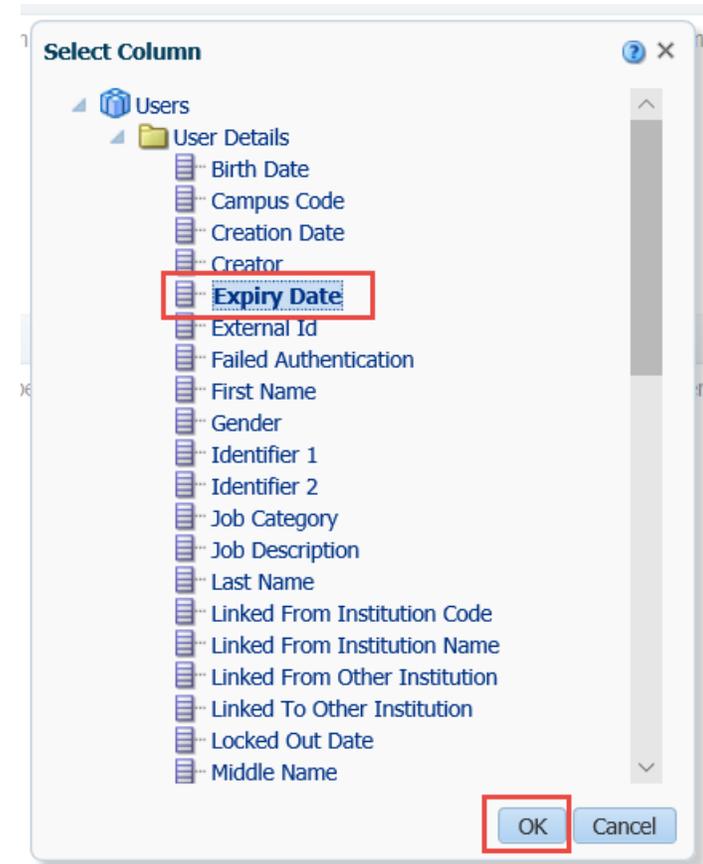
Selecting a Subject Area



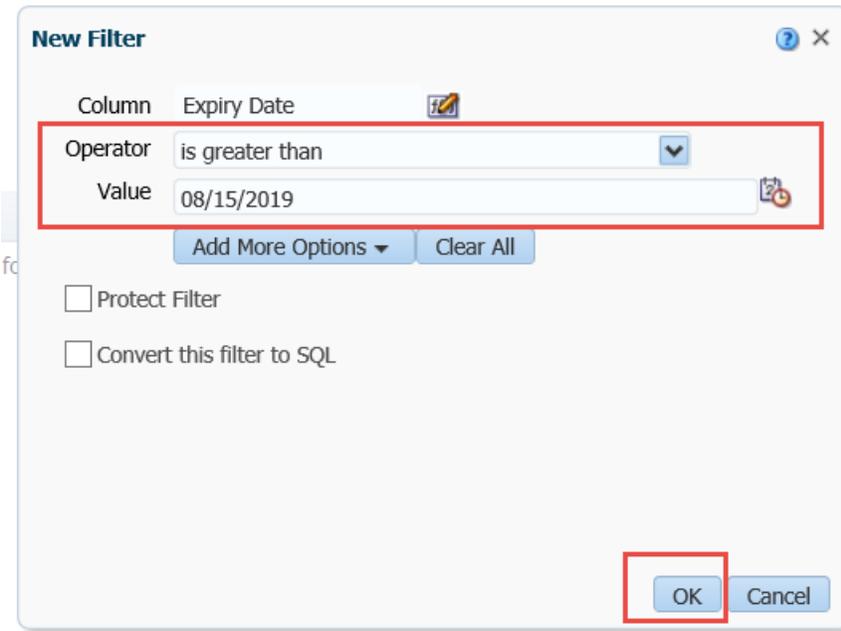
Adding Columns to Analyses

The screenshot displays a software interface titled "My new User Report about Roles". It features a "Criteria" tab and a "Subject Areas" pane on the left. The "Subject Areas" pane is expanded to show a tree view under "Users" > "User Details". The "Primary Identifier" item is highlighted with a red rectangular box. On the right side, the "Selected Columns" pane contains a list with "User Details" and "Primary Identifier". A red star icon is positioned over the "Primary Identifier" entry in this list. Below the "Selected Columns" pane is a "Filters" section with a text instruction: "Add filters to the analysis criteria by clicking on Filter option for the specific column in the S".

Add a Filter



Adding the filter operator and value



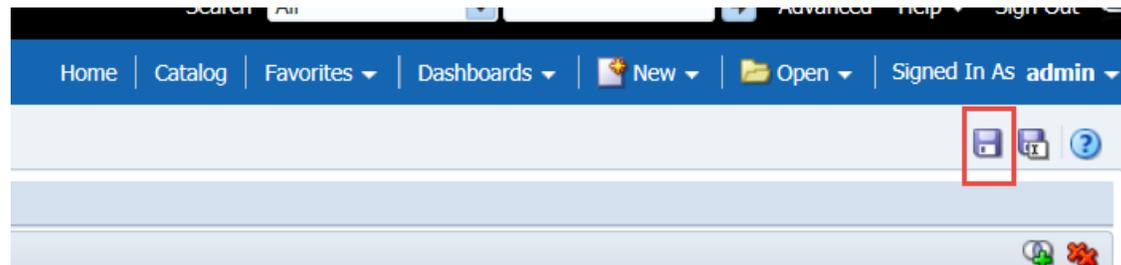
The screenshot shows a 'New Filter' dialog box with the following configuration:

- Column: Expiry Date
- Operator: is greater than
- Value: 08/15/2019

Buttons: Add More Options, Clear All, OK, Cancel

Options:
 Protect Filter
 Convert this filter to SQL

Save Your Analysis!



View the Results

The screenshot displays the ExLibris Analytics interface. The main window title is "My new User Report about Roles". The "Results" tab is selected, and a red arrow points from this tab to the table below. The table is titled "My new User Report about Roles" and has two columns: "Primary Identifier" and "Note".

Primary Identifier	Note
20801248004322	
Acq_Lead	
Acq_Tech	
BellLib	
Cat_Lead	
Cat_Tech	
Circ_Lead	
Circ_Student	
Circ_Tech	
Deposit_Staff	
Discovery_Staff	
E-Resource_Lead	
E-Resource_Tech	
EXL4TEST	
IDIMCR	HOME_LIBRARY: TST
IDIMII name	ILL-TYPE=01
IDMNK2	HOME_LIBRARY: TST
IDOCLCI	HOME_LIBRARY: TST
	ILL-TYPE=01
IDRAUI	HOME_LIBRARY: RAU
IDROC01	HOME_LIBRARY: TST
IDTST000000012	HOME_LIBRARY: TST
IDTST000000032	HOME_LIBRARY: TST
	TO-DEL 20181009

Change Attribute to Measure for User ID Column

The screenshot displays a software interface with two main sections: "Selected Columns" and "Filters".

- Selected Columns:** Contains a table with columns "User Details" and "Note". The "Primary Identifier" column is highlighted, and a context menu is open over it. The menu items are: "Sort", "Edit formula" (highlighted with a red box), "Column Properties", "Filter", "Delete", and "Save Column As".
- Filters:** Contains a filter rule: "Expiry Date is greater than 08/15/2019".

Instructions in the "Selected Columns" section state: "Double click on column names in the Subject Areas pane to add them to the analysis. Once added, you can edit its name."

Insert Function "COUNT"

Edit Column Formula

Column Formula | Bins

Folder Heading: User Details
Column Heading: Primary Identifier

Custom Headings
 Contains HTML Markup

Aggregation Rule (Totals Row): Default (None)

Available

Subject Areas

- Users
 - User Details
 - Preferred Contact Information
 - Select only one of the below
 - Address
 - Phone Number
 - Email
 - Identifier
 - Block
 - Role
 - Campus Details
 - Note
 - Statistics
 - Institution

Column Formula

"User Details"."Primary Identifier"

f(...) Filter... Column Variable + - x / % () ||

OK Cancel

Insert Function

Functions

- Aggregate
 - Aggregate At
 - Avg
 - AvgDistinct
 - BottomN
 - Count**
 - CountDistinct
 - Count*
 - Mavg
 - Max
 - Median
 - Min

Selected: Count
Syntax: COUNT(expr)
Where: *expr* is any expression.
Example:
Description: Calculates the number of rows having a non-null value for the expression.

OK Cancel

Tidy Up the Column Heading

Edit Column Formula

Column Formula | Bins

Folder Heading: User Details

Column Heading: Count users w/a specific n x

Custom Headings

Contains HTML Markup

Aggregation Rule (Totals Row): Default (None)

Available

Subject Areas

- Users
 - User Details
 - Preferred Contact Information
 - Select only one of the below
 - Address
 - Phone Number
 - Email
 - Identifier
 - Block
 - Role
 - Campus Details
 - Note
 - Statistics
 - Institution

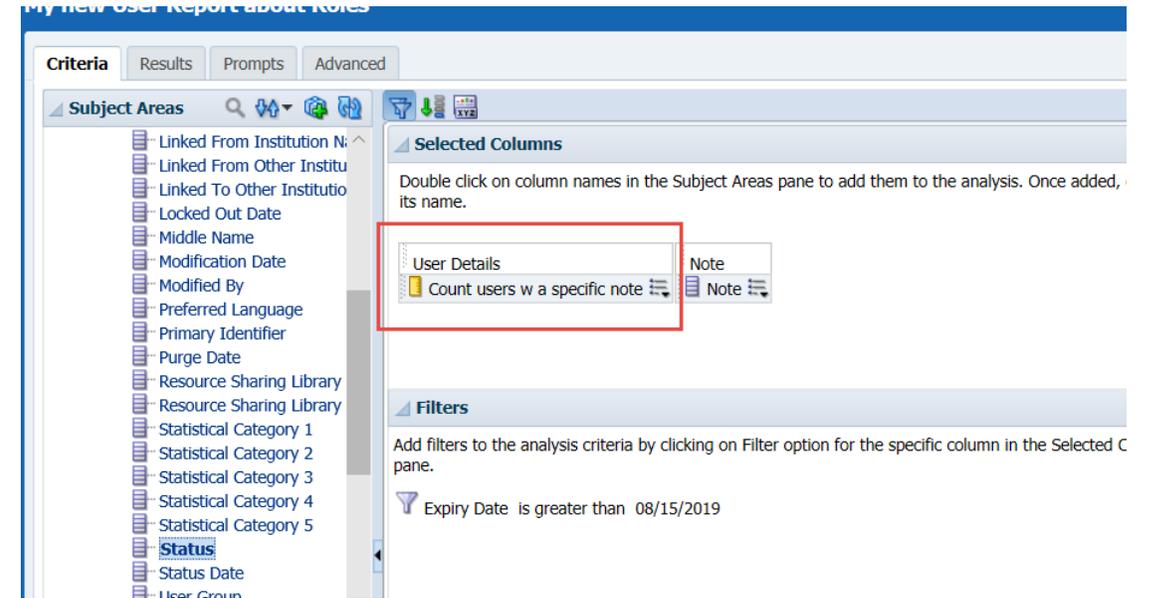
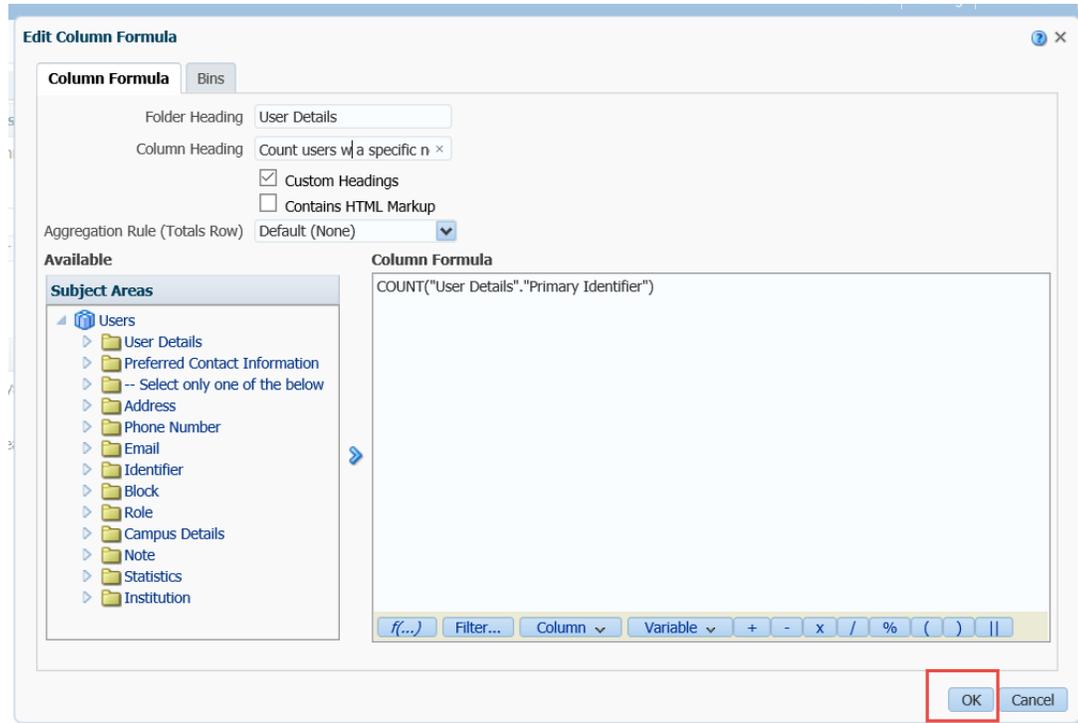
Column Formula

COUNT("User Details"."Primary Identifier")

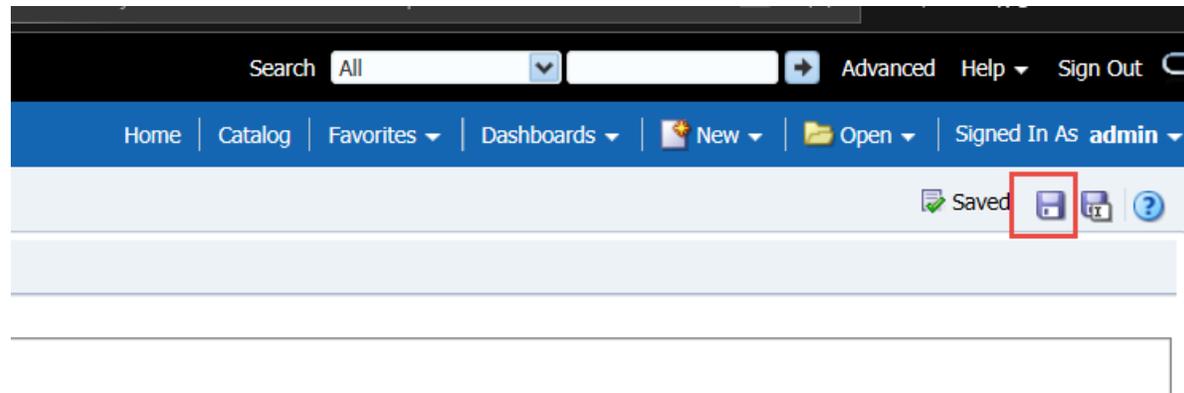
f(...) Filter... Column Variable + - x / % () ||

OK Cancel

Edit the Formula and Insert Function



Save Your Analysis!



View Your Analysis!

Compound Layout

Title   

My new User Report about Roles

Table    

Count users w a specific note	Note
29	
2	PALS Test Record This is note number 1
1	TEST ID
1	This is a test (remov*ed) of the WM fea@ture in RW....looking for string in pa
1	This is a test (remov*ed) of the WM fea@ture in RW....looking for string in parens above
1	HOME_LIBRARY: MSU
1	HOME_LIBRARY: RAU
23	HOME_LIBRARY: TST
1	Has hit renewal limit
4	ILL-TYPE=01
1	Left umbrella in library - Please come and pick up.
1	Need to update address
1	TO-DEL 20120910
10	TO-DEL 20181009
1	emeritus staff effective 4/26/2011

[Add to Briefing Book](#)

Data Awareness Reminders

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?

Helpful Tools

Analytics Cheat Sheet

- Answer 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>

Upcoming Presentations & Other Important Dates

Spring 2020 - Tentative

- Changing the Recipe
- Spreading the Word
- Data Potluck
- SQL

Spring/Summer 2020

- Ex Libris Knowledge Days
- ELUNA



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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