CARLI

ALMA ANALYTICS FOR E-RESOURCES PART II FEBRUARY 16, 2023



2022-2023 ERMC

- Elizabeth Hollendonner Elizabeth Nelson \bullet
- Andrea Imre
- Sarah Kurpiel

- Elaine Fetyko Page •
- Sara Rizzo

- Megan Ruenz
- Lisa Wallis
- Craig Whetten

Today's Agenda or Topics

- Introductions
- How to copy and customize shared reports for presenting your library's data
 - Andrea Imre
- Creating Original COUNTER Reports in Alma Analytics
 - Lisa Wallis
- Working with non-COUNTER reports in Alma
 - Megan Ruenz

Why this topic?

Builds on the work started last year by the E-Resources Management Task Force

- <u>Two Libraries using Alma Analytics for IPEDS and ACRL Reporting</u> <u>Data</u> (presented February 18, 2022)
- <u>Setting Up and Using SUSHI in Alma</u> (presented April 14, 2022)

CARLI E-Resources Usage Stats Survey (12/22 - 1/23)

- More shared Analytics reports
- Using Analytics
- Understanding COUNTER



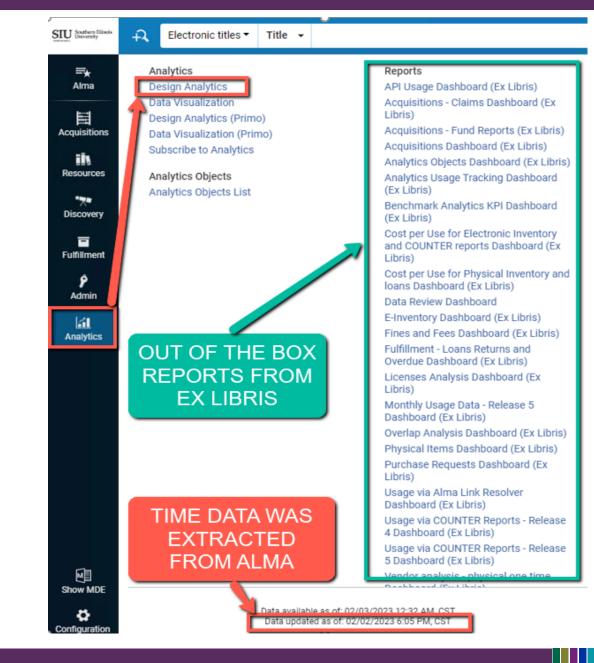
HOW TO COPY AND CUSTOMIZE SHARED REPORTS FOR PRESENTING YOUR LIBRARY'S DATA

Andrea Imre

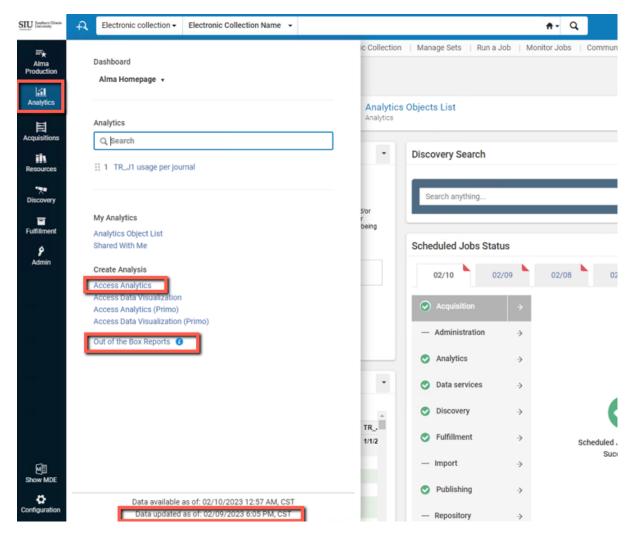
- Basics
- Alma Analytics Navigation and Folder Structure
- How to locate a report in shared folders? Browsing and searching
- How to copy a shared report?
- How to edit a shared report?
- How to share a report?

BASICS

- Must have Alma Design Analytics Role to view, edit, save reports or Analytics Administrator Role to also manage Analytics objects
- Alma -> Analytics -> Analytics -> Design Analytics-> Catalog
- In Analytics, data is not the most current Alma data – check the Data Updated timestamp
- Out of the Box reports by Ex Libris are also available in Design Analytics at /Shared Folders/Alma



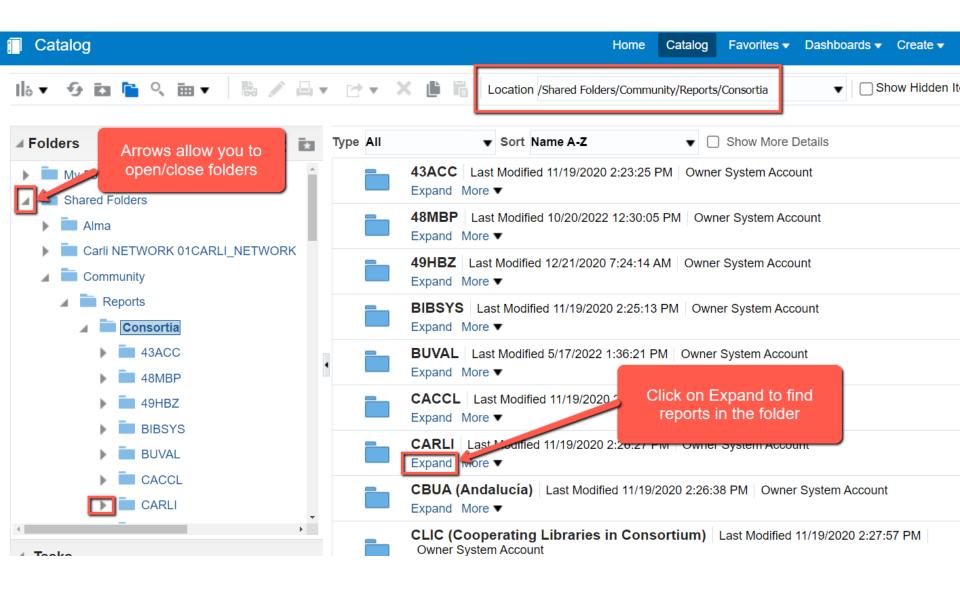
- Interface change check video at <u>https://www.youtube.com</u> /watch?v=sfKZ2Idd-zA
- Currently new UI is optional but by August 2023 the old UI will be retired
- New UI doesn't impact Analytics report creation



ALMA \rightarrow ANALYTICS \rightarrow ANALYTICS \rightarrow DESIGN ANALYTICS \rightarrow CATALOG

- Avoid using your browser's back button
- Use the **Catalog** button in top navigation bar whenever you get lost within Analytics

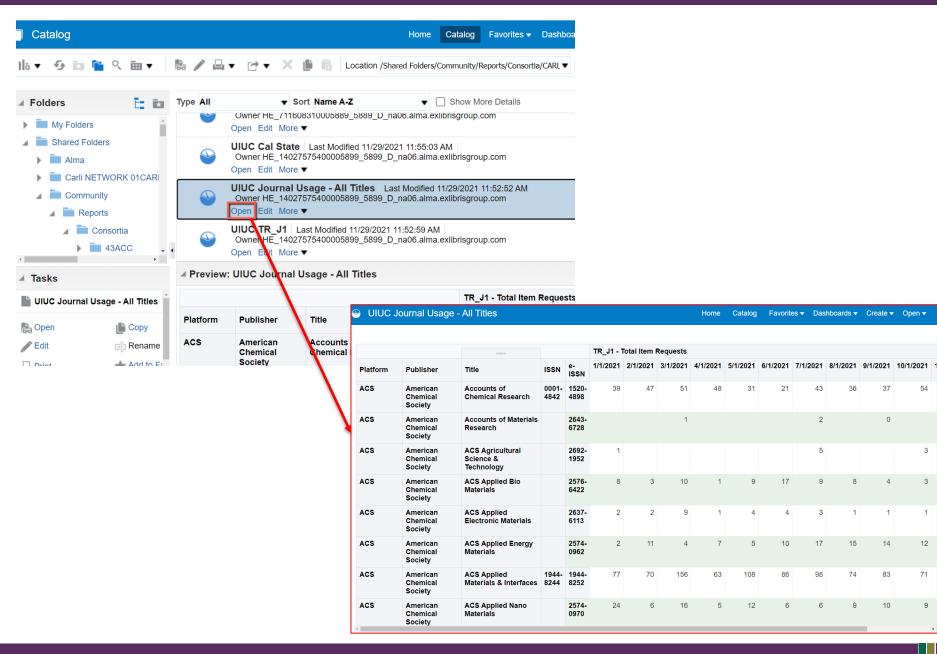
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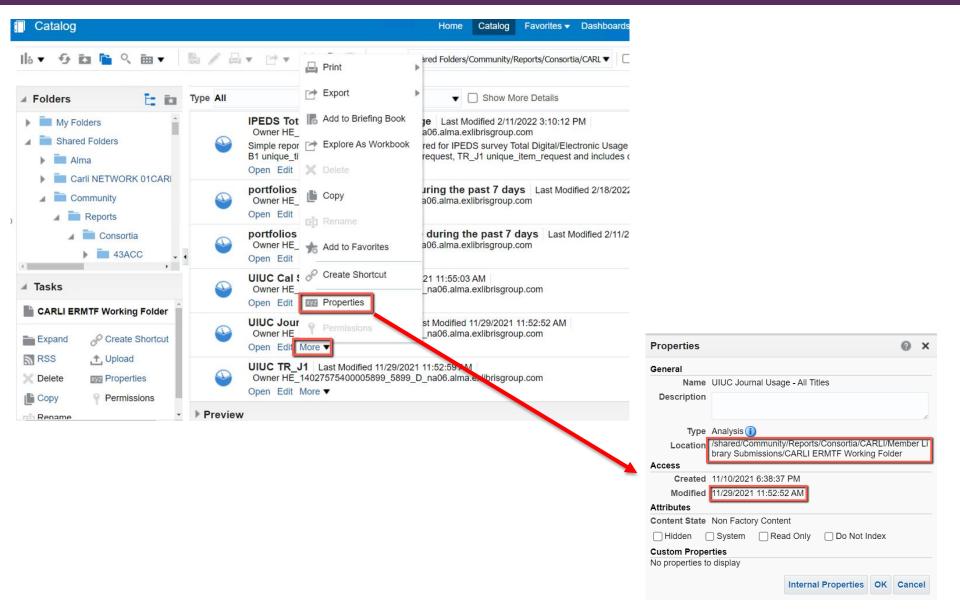
PREVIEWING REPORT RESULTS (SCROLLING REQUIRED)

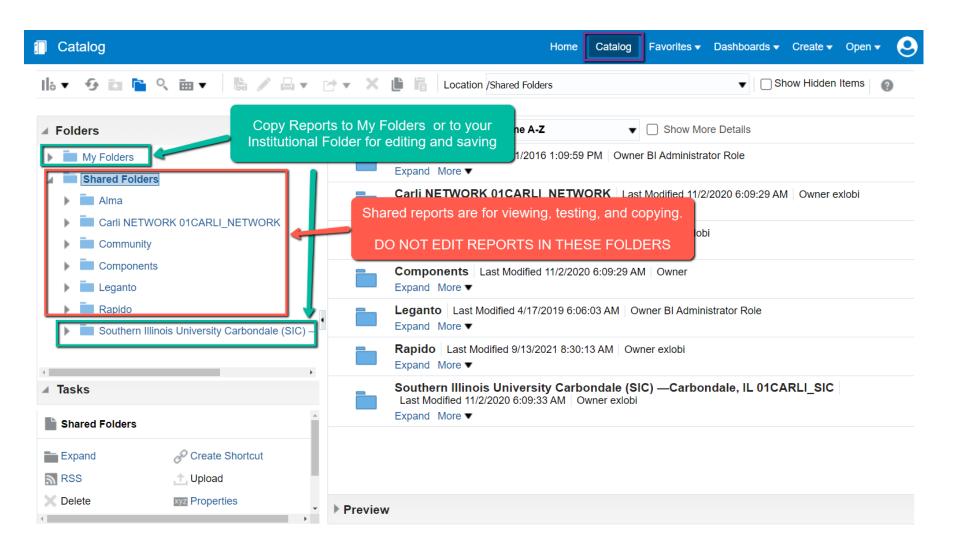
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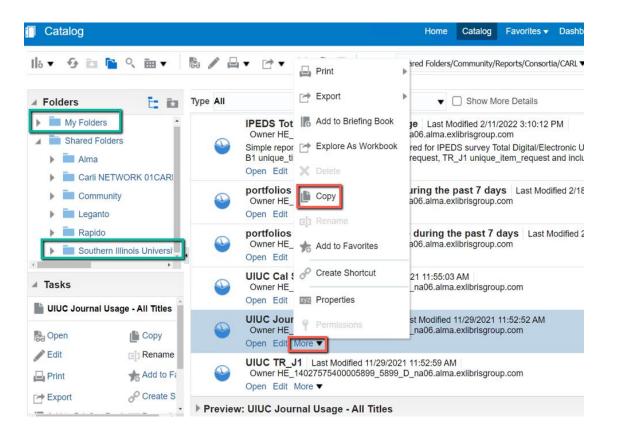
OPEN TO VIEW RESULTS IN FULL SCREEN



CLICK MORE TO VIEW REPORT PROPERTIES







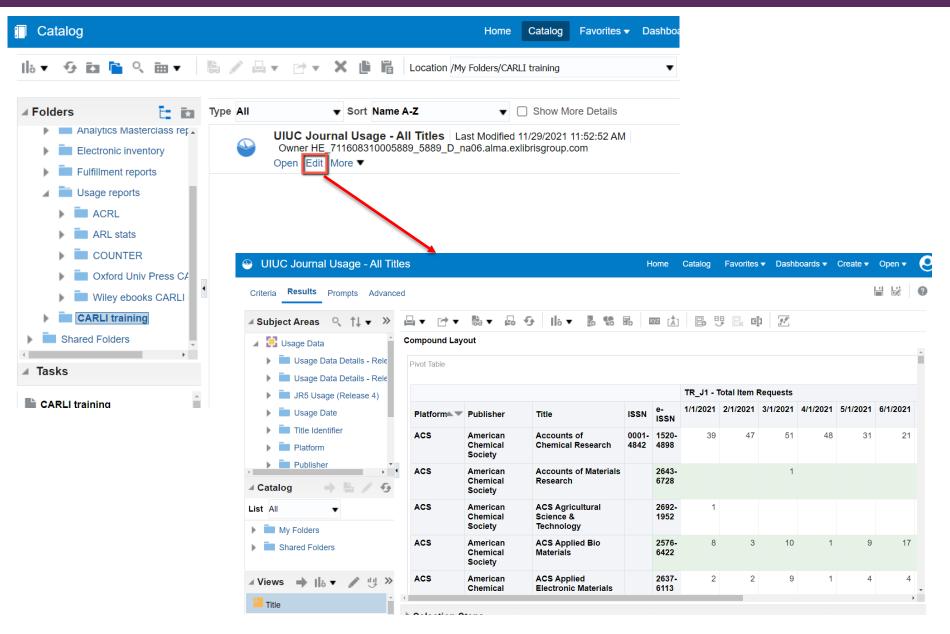
- More -> Copy -> Navigate to a folder either within My Folders or your institution's folders to save the report
- May need to close/open several folders by clicking on grey triangles

CREATING A NEW FOLDER

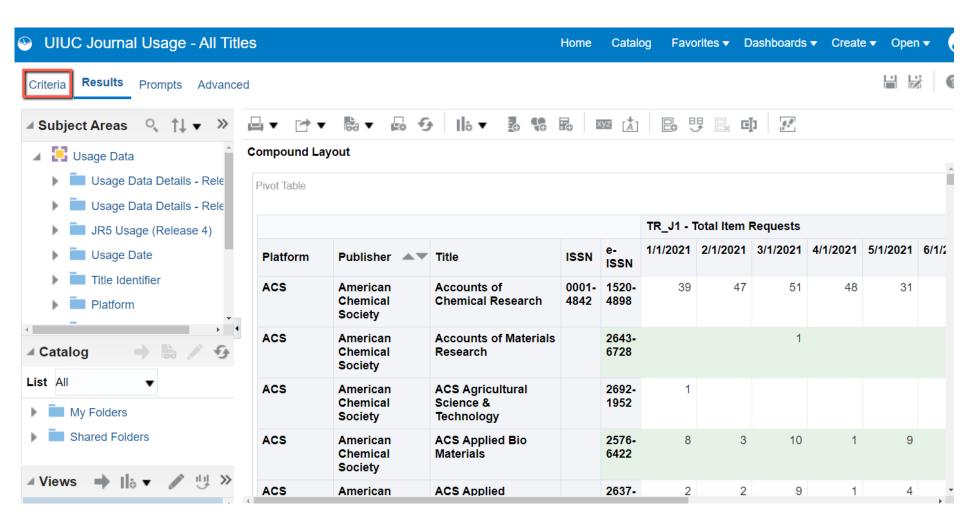
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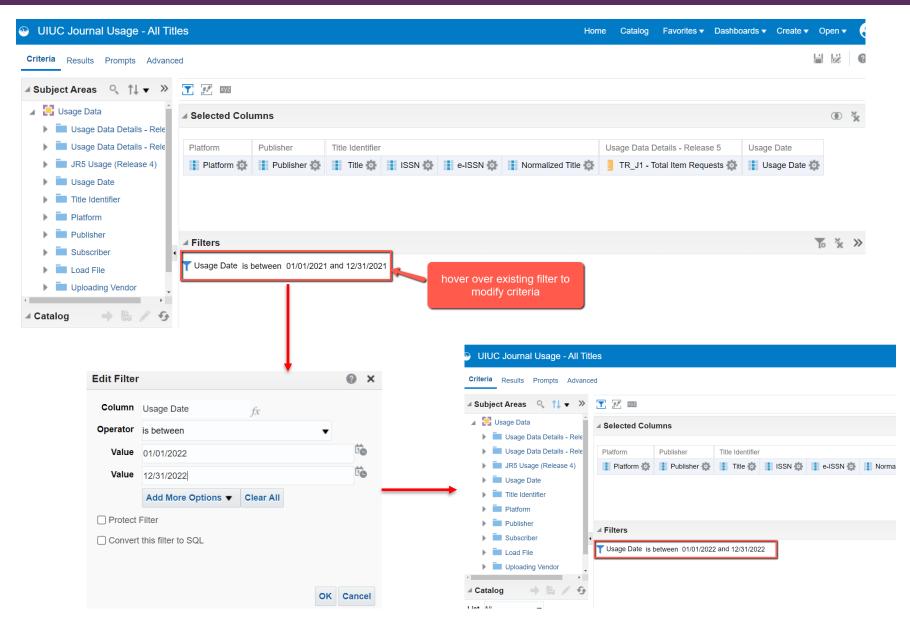
NOW YOU CAN EDIT WITHOUT AFFECTING THE SHARED VERSION



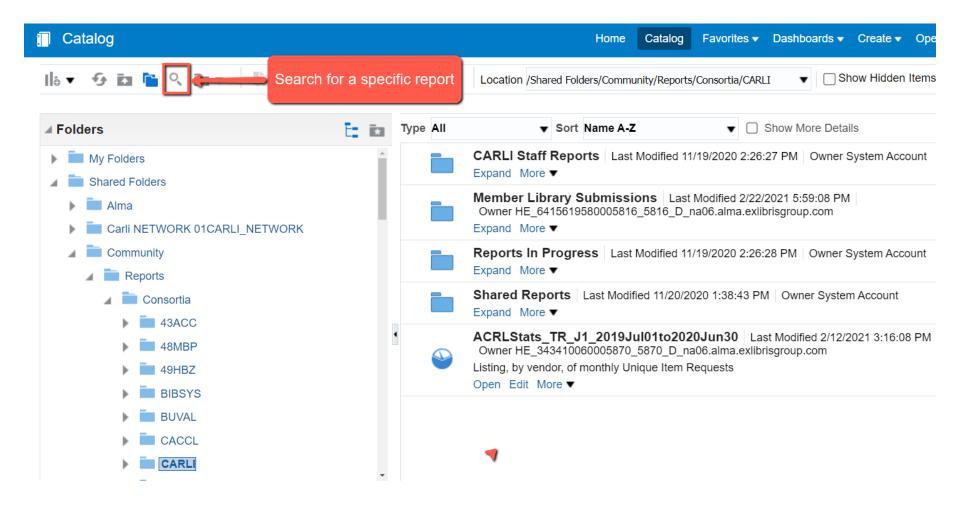
CLICK ON CRITERIA TO SEE THE PARAMETERS USED IN THE REPORT



PLAY WITH THE CRITERIA

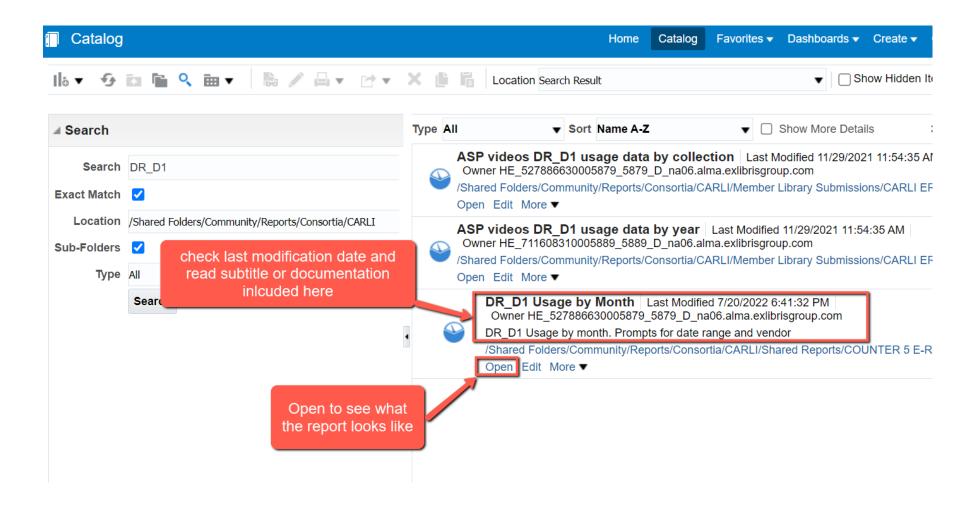


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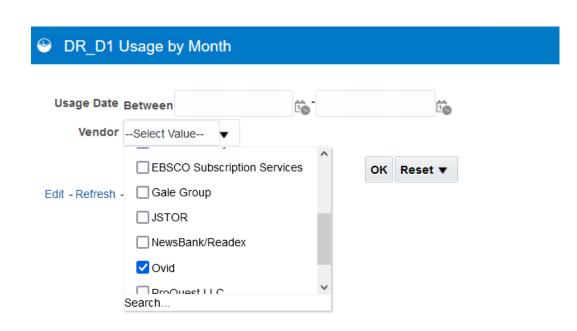


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WHEN YOU OPEN A REPORT YOU MAY SEE BUILT IN PROMPTS



- Values offered under these prompts all come from YOUR institution's Alma data
- Select desired values and hit OK

OR_D1 Usage by Month

Home Catalog Favorites Tashbo

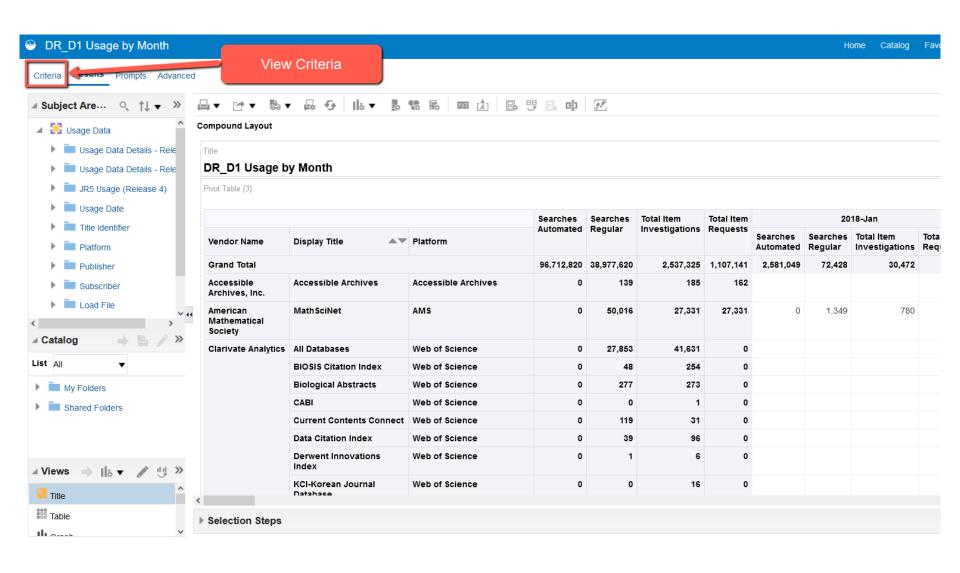
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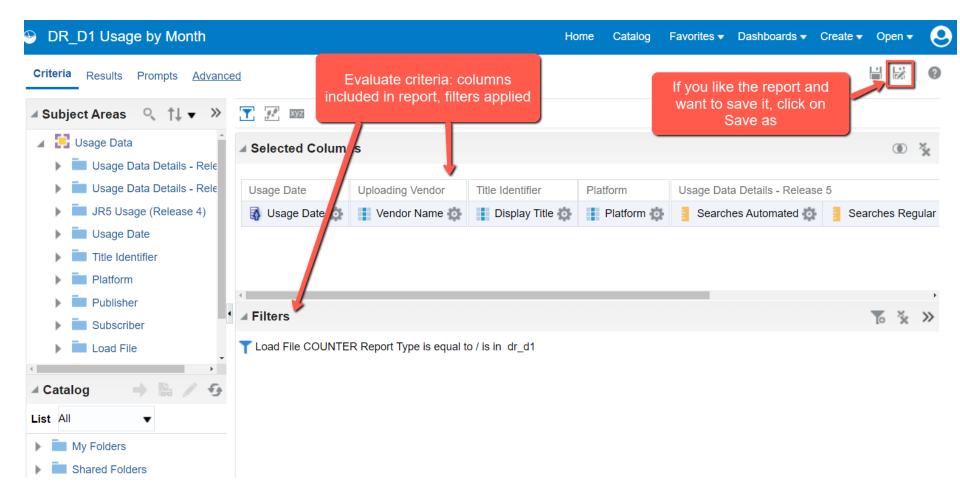
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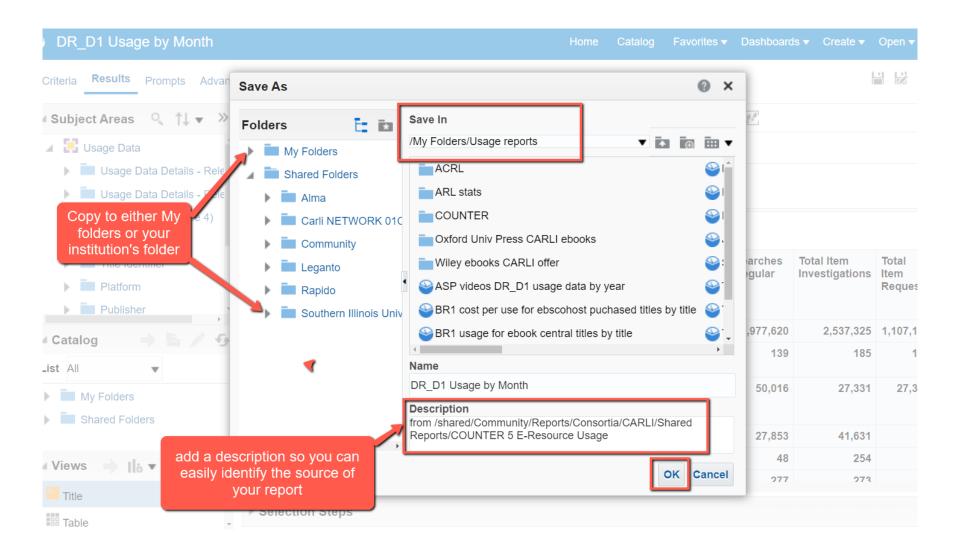
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VIEW CRITERIA







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SHARE REPORTS AS WIDGETS

- Report must be copied from My Folders to Institutional Folder
- Analytics Administrator must add report to Analytics Objects before it can be used as a widget or can be scheduled for email delivery

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- Ex Libris' video on how to share using the new interface: <u>https://www.youtube.com/watch?v=sfKZ2Idd-zA</u>
- Scheduling and Subscribing to Alma Analytics Reports
 <u>https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_O</u>
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- Alma Analytics Subject Areas to find Analytics Field Descriptions
 <u>https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_O</u>

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Questions?

Contact Andrea at aimre@siu.edu





CREATING ORIGINAL COUNTER REPORTS IN ALMA ANALYTICS Lisa Wallis

Which ACRL Questions Will This Answer?

• 60B. Total Digital/Electronic Circulation or Usage

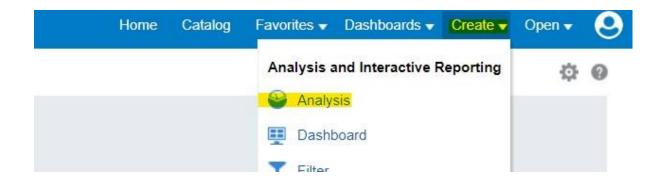
Most vendors will provide usage statistics in COUNTER reports. As of January 2019, Release 5 became the current Code of Practice (see Project COUNTER Release 5 Code of Practice [https://www.projectcounter.org/wp-content/uploads/2019/11/Release_5_for_Providers_20191030.pdf]). Relevant COUNTER Release 5 reports for e-books are: TR_B1: Book Requests (Excluding OA_Gold). As to the COUNTER 5 metric type for e-books, report "unique title requests." For e-media, use IR_M1: Multimedia Item Requests, report metric type for "total_item_requests" is the most relevant.

• 63. E-serials Usage (COUNTER 5, COUNTER 4, or other if needed)

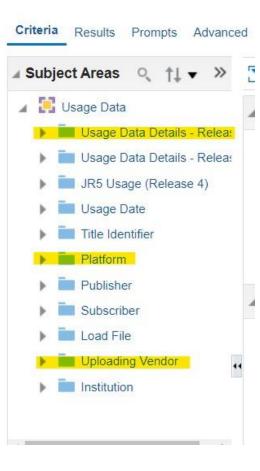
Libraries may need to ask vendors for e-serial usage reports. Reports may not be delivered automatically or in easily understood formats by the vendor to the library. Most vendors will provide usage statistics in COUNTER Release 5 reports. Start with TR_J1 (COUNTER 5) and add OA if discoverable/available. Also, please add a note if the OA counts were manually added. For the metric type, report "unique item requests." If COUNTER Release 5 reports are unavailable, the most relevant COUNTER Release 4 report is JR1 ("Number of Successful Full-Text Article Requests by Month and Journal").

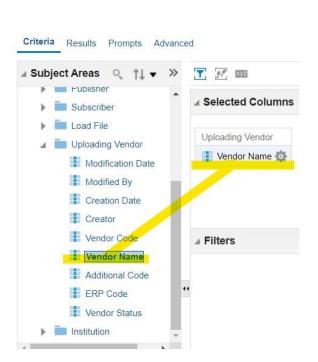
Step-by-Step Instructions - 60B

- 1. Login to Alma and click Analytics -> Design Analytics
- 2. Create -> Analysis
- 3. Search for 'usage' and select Usage Data
- 4. Add, at a minimum, the following variables
 - 1. Uploading Vendor -> Vendor Name
 - 2. Platform -> Platform (optional: Normalized Platform)
 - 3. Usage Data Details Release 5 -> TR_B1 Unique Title Requests and IR_M1 Total Item Requests
- 5. Click Results
- Right-click on TR_B1 column and select Show Row level Grand Total -> After Values
- 7. Click Prompts
 - 1. Click the green + sign -> Column Prompt -> More Columns...
 - 2. Choose Usage Date -> Usage Data Fiscal Year (then OK twice)
- 8. Save the Report
- 9. Return to Catalog and reopen the report

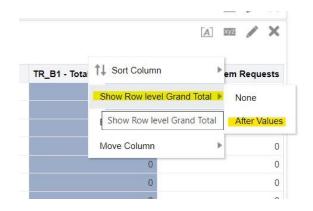


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QL to



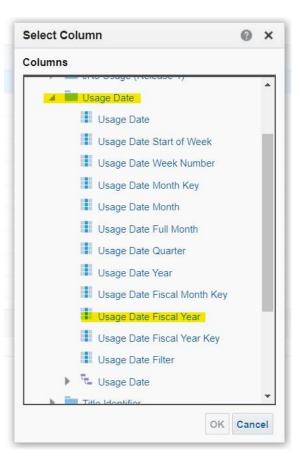






118,919	31,984
0	0
0	U

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Prompt Fc	Vendor Name	Column Prompt	
	Platform	Variable Prompt	
	TR_B1 - Total Item Requests	Image Prompt	
	IR_M1 - Total Item Requests	Currency Prompt	
	More Columns		
		1	



TR_B1and IR_M1_withFYprompt

Usage Date Fiscal Year	Select Value	•
	🗌 FY-2018	
Edit Defrech Conu	🗌 FY-2019	2
Edit - Refresh - Copy	🗌 FY-2020	
	🗌 FY-2021	
	FY-2022	_
	🗌 FY-2023	~
	Search	

TR_B1and IR_M1_withFYprompt

Vendor Name	Platform	TR_B1 - Total Item Requests	IR_M1 - Total Item Requests
ABC-CLIO Electronic Resources	ABC-CLIO	26	C
Allen Press Electronic Resources	Allen Press	0	C
American Chemical Society Publications Electronic Resources	ACS	55	C
American Institute of Physics Electronic Resources	aip	0	C
American Mathematical Society Electronic Resources	AMS	0	C
	ams.org	0	C
American Physical Society Electronic Resources	APS	0	C
American Physiological Society Electronic Resources	The American Physiological Society	0	C
American Speech-Language-Hearing Association Electronic Resources	asha	0	C
Annual Reviews Electronic Resources	Annual Reviews	0	C
Association for Computing Machinery Electronic Resources	acm	0	C
BioOne Electronic Resources	BioOne	0	C
Cambridge University Press Electronic Resources	Cambridge Core	4	C

Step-by-Step Instructions - 63

- 1. Login to Alma and click Analytics -> Design Analytics
- 2. Create -> Analysis
- 3. Search for 'usage' and select Usage Data
- 4. Add, at a minimum, the following variables
 - 1. Uploading Vendor -> Vendor Name
 - 2. Platform -> Platform (optional: Normalized Platform)
 - 3. Usage Data Details Release 5 -> TR_J1 Unique Item Requests
- 5. Click Results
- Right-click on TR_J1 column and select Show Row level Grand Total -> After Values
- 7. Click Prompts
 - 1. Click the green + sign -> Column Prompt -> More Columns...
 - 2. Choose Usage Date -> Usage Data Fiscal Year (then OK twice)
- 8. Save the Report
- 9. Return to Catalog and reopen the report

Considerations

- Does the data make sense?
 - Do vendors show 0 usage? Might be ok!
 - Does that vendor have a product with that type of item (e.g. ebook or journal or media)?
 - Is SUSHI working successfully?
- How to set up date filter
 - ACRL -> FY but other options available, such as "between MM/DD/YYYY and MM/DD/YYYY"
- Adding titles for output
 - On the screen you see what you just ran, but if you print it???

Questions?

Contact Lisa at I-wallis@neiu.edu



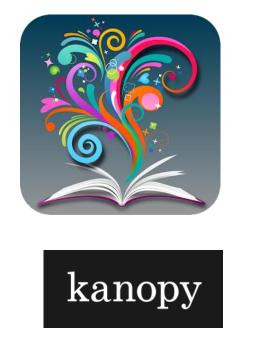


 WORKING WITH NON-COUNTER REPORTS IN ALMA

Megan Ruenz

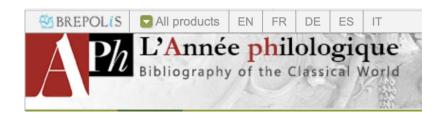
Overview of Process

- Vendor reports
- "COUNTER-ize"
- Manually Upload Report to Alma
- View in Analytics









Working with non-COUNTER Vendor usage reports



Usage Statistics

Dictionary of Old English Online Publications

non-COUNTER "Search Totals" most resemble COUNTER DR_D1 report

<u>Main Page</u>

Site: Wheaton College (IL) Resource(s): Dictionary of Old English Online (doe) From Jul 1 2021 to Jun 30 2022

	SUMMARY OF ALL SELECTED COLLECTIONS														
	browse	search view							search view						
bibl	fascicle	Total browse	bool	lot	simple	Total search	anno	doc	entry	st	Total view	Grand total			
0	0	0	404	2275	82207	84886	45	4486	83538	2184	90253	175139			

					Dictiona	ry of Old Eng	lish Online (doe)										
			brows	е			search		view								
		bibl fascicle browse total			bool	lot	simple	search total	anno	doc	entry	st	view total	Total			
Total across all institutions	Expand	0	0	0	404	2275	82207	84886	45	4486	83538	2184	90253	175139			
Wheaton College (IL), Wheaton, Illinois, United States	Collapse	0	0	0	0	0	22	22	0	0	9	0	9	31			
	July, 2021	0	0	0	0	0	0	0	0	0	0	0	0	0			
	August, 2021	0	0	0	0	0	1	1	0	0	1	0	1	2			
S	eptember, 2021	0	0	0	0	0	0	0	0	0	0	0	0	0			
	October, 2021	0	0	0	0	0	2	2	0	0	1	0	1	3			
М	November, 2021	0	0	0	0	0	0	0	0	0	0	0	0	0			
C	December, 2021	0	0	0	0	0	1	1	0	0	0	0	0	1			
	January, 2022	0	0	0	0	0	0	0	0	0	0	0	0	0			
	February, 2022	0	0	0	0	0	2	2	0	0	3	0	3	5			
	March, 2022	0	0	0	0	0	5	5	0	0	1	0	1	6			
	April, 2022	0	0	0	0	0	0	0	0	0	0	0	0	0			
	May, 2022		0	0	0	0	11	11	0	0	3	0	3	14			
	June, 2022	0	0	0	0	0	0	0	0	0	0	0	0	0			

Non-COUNTER Spreadsheets

• Enter usage data into a COUNTER formatted spreadsheet

	А	В	С	D	E	F	G	н	1	J	К	L	М	Ν	0	Р	Q	R	S
1	Report_Name	Database Search and Item Usag	ge																
2	Report_ID	DR_D1																	
3	Release	5																	
4	Institution_Name	Wheaton College																	
5	Institution_ID	WC102521																	
6	Metric_Types	Searches_Automated; Sea	arches_Feder	ated; Searches_Regular;	Total_Item_Ir	vestigations; Total_Ite	m_Requests												
7	Report_Filters	Access_Method=Regular																	
8	Report_Attributes																		
9	Exceptions																		
10	Reporting_Period	Begin_Date=2021-07-01;	End_Date=2	022-06-30															
11	Created	2023-01-20																	
12	Created_By	University of Toronto																	
13																			
14	Database	Publisher	Publisher_ID	Platform	Proprietary_ID	Metric_Type	Reporting_Period_Total	Jul-2021	Aug-2021	Sep-2021	Oct-2021	Nov-2021	Dec-2021	Jan-2022	Feb-2022	Mar-2022	Apr-2022	Mav-2022	Jun-2022
15	Dictionary of Old English	University of Toronto		University of Toronto		Searches_Automated	0	0	0	0	0	0	0	0	0	0	0	C	0
16	Dictionary of Old English	University of Toronto		University of Toronto		Searches_Federated	0	0	0	0	0	0	0	0	0	0	0	C	0
17	Dictionary of Old English	University of Toronto		University of Toronto		Searches_Regular	22	0	1	0	2	0	1	0	2	5	0	11	0
18	Dictionary of Old English	University of Toronto		University of Toronto		Total_Item_Investigations	22	0	1	0	2	0	1	0	2	5	0	11	0
19	Dictionary of Old English	University of Toronto		University of Toronto		Total_Item_Requests	22	0	1	0	2	0	1	0	2	5	0	11	0
20																			
21																			
22																			
23																			
24																			

• Customize for your institution and retrieval information:

Institution_Name, Institution_ID, Reporting_Period, Created, Created_By, Date Range

Manually Upload to Alma

Vendor Record > Usage Data Tab > Upload File

uswell IBRARY	V	′endors ▼ All ▼						Q,			}	• •	1	2 🔮	? •?) 🗩	5	4
≕ ★ Alma	< Ven	ndor Details											Cancel	Save	LIN	NVERSITY		NTO
un Market	Summa	ary Contact Information	Contact People	EDI Information	Usage Data	System Integ	ration Invoices	PO Line	es (Communications Attachm	ents	Notes	Analy	tics			RESS	
Acquisitions	SUSH	HI Accounts												~	Vend	lor code TO		
Resources											🔁 Ade	SUSHI	Account r		Whe	tution aton Colleg aton, IL	e (WHE) –	
Discovery	•	Subscriber : All 👻 Report T	ype : All 👻 Counter	Release : All 👻											wnea		ŷ	
Fulfillment					Ν	lo records were	found.											
P Admin	Uplo	aded Files																
Analytics		of 4 Load File ID -		Q							Upload F	ile 🔻	G 0					
Analytics	Ŧ	Status : All Files 🔹 Subscri	ber : All 👻 Upload I	Date : All Uploaded	 Report Type 	e: All 👻 SUS	HI Account : All 👻	Clear all		Select a file		×						
		‡ File Name	🔹 🔻 Upload Date	↓ Uploading ♥ User	Subscriber	Status	Status Description	Report Type	Data Start Date	L	×							
	1	DOE_FY22_Jul_Jun_R5.xlsx	21 Jan 2023 21:16:10	02972	WC	Fully processed		dr_d1:	Jul 2021	X								
	2	DOE_FY19_Jun_May_R5.xlsx	- 27 Oct 2021 16:01:20	02972	WC	Fully processed	-	dr_d1:	Jun 2018	DOE_FY23_Jul_Dec_R5.xlsx (10.17 KB)								
	3	DOE_FY20_Jun_May_R5.xlsx	27 Oct 2021 15:10:07	02972	WC	Fully processed	-	dr_d1:	Jun 2019									
	4	DOE_FY21_Jun_May_R5.xlsx	- 26 Oct 2021 20:24:29	02972	WC	Fully processed	-	dr_d1:	Jun 2020	DOE_FY23_Jul_Dec_R Subscriber						ExI	.ibris.	
\$										WC	•					Ex Libris, Part		2023
Configuration															>>			

TOPIC 3: NON-COUNTER STATISTICS AND ALMA

View Results in Alma Analytics

	A	В	С	D	E	F	G	Н	I	J	K	L	Μ	Ν	0
1 2 3 4 5	WHEATON COLLEGE For Christ & His Kingdom	Electronic Usage by Month and COUNTER R4 and R5	,												
7				FY-2022											
8				July	August	September	October	November	December	January	February	March	April	May	June
9	Vendor Name	Platform	Display Title	DR_D1 - Searches Regular											
10	UNIVERSITY OF TORONTO PRESS	University of Toronto	Dictionary of Old English		:	1		2		1		2 !	5	1	1
1:															

12 Database Usage by Month and Platform - Counters 4 and 5

13

List of resources, links for further learning...

- <u>COUNTER report templates</u>
- Ex Libris Documentation on <u>Manually Uploading and Deleting COUNTER Data</u>

Questions?

Contact Megan at megan.ruenz@wheaton.edu



Questions?

Contact CARLI at support@carli.lllinois.edu

