



Alma Assessment/Reporting Analytics: To Do or Not To Do?!?

Shaping the Future Together
GIL Users Group Meeting
May 19, 2016

Assessment Task Force

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* Vanguard institution participating in USG data load environment for exploration & testing

** GA Tech went live with Alma December 2015

Assessment/Reporting

Using data collected from the Alma Institutional Leads, the Assessment Team will provide an overview of current assessment and reporting practices using Voyager which includes Access reports, WebReports and VRS Reports. This data will be used to recommend which practices may be continued, discontinued, or created using Alma Analytics. This will also be the time to discuss the possibilities of Alma Analytics and how the team will move forward during the implementation process.

USG Reports

Compilation of GIL and GALILEO reports
ran at system level collected

Survey Conducted

- 8 questions
- 19 responses
- 65% return rate
- demographics not collected
- survey completed by institutional leads with assistance from others who may actually run reports

Questions Asked

1. Please list and rank with 1 being the most important all reports currently run at your institution and provide a brief description of each.
2. What are the most important criteria/metrics do you use when running reports? Please list and explain the importance.

Questions (cont.)

3. Are there any reports currently ran which there is no clear understanding why?
Please list the report names and explain the uncertainty.
4. Are there any reports you run for assesment and budget purposes for which the resulting data are used strictly on-campus/internally? If yes, please write the report names here.

Questions (cont.)

5. Are there any reports you run for assessment and budget purposes for which the resulting data are used strictly off-campus/externally (e.g. IPEDS, ACRL, ARL)? If yes, please write the report names here.
6. Are there any reports you wish could run that are not available in Voyager? If yes, please list those reports here.

Questions (cont.)

7. Provide an example scenario for which you would run a report using Voyager that you might run in Alma on a regular basis.
8. Do you have any questions or comments regarding Alma Analytics not addressed by questions 1-7? If so, please list those questions or comments here.

Discussion of Select Responses

- Question 6
- Question 7
- Question 8

Questions ????

Comments???

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Q6 Responses: Are there any reports you wish you could run that are not available in Voyager?

No

No

No

No. I have been able to write queries for all of our needs using Access reports

NO

Item Status reports (whether a book is charged, lost system applied, etc), Overdue items (by length of time, 5 days over, 15 days overdue), Fines/Fees reports (total of fees on patron's account \$5 or more) Line items by requestor (Acq.) Individual reports customized by selector (Acq.) – delineate specific funds, subject areas, and formats.

-Administrative Summary Report by date range that includes the number of items, holdings, and bibs at fiscal year-end and the number of items, holdings, and bibs added during the year and a correct number of browses for FY. -Average Age of Collection Report by call number range; by location; by item type -Shelf List reports that that allow us to choose the number of lines displayed per record and choose the various criteria for ongoing inventory work, such as: by call number range; by location; by item type; by publication date -Survey information reports that would generate collection-related data, such as number of different types of physical and electronic materials held at end of fiscal year and added during the fiscal year for the IPEDS survey, ACRL survey, and other surveys that are required (including a Number of Serials report by call number and by location that can be run from the leader information and that includes periodicals or excludes periodicals) (also including a Serial Titles Report by the same criteria.) -A correct Browse Count report by date range and these other criteria would be nice, too. (by location; by item type; by call number range) The Browse Count reports in our Access reports are not correct. We would also like to be able to print lists of search results from Primo, maybe be able to export search results screens to Excel, which we can use to go to the stacks and pull items for displays and such. The GIL-Find search results screen is not printer-friendly. There are other reports that Systems Librarians at other institutions can create in Access that we don't have the expertise to create. This is very frustrating, as is getting reports run for us with the criteria we need.

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We would like to be able to do collection analysis statewide. For example, if we identified resources in an area such as Latin American studies or engineering at our institution, we would like to compare our holdings with other GIL libraries as well as identify resources we do not have but that would be available to our patrons through GIL Express.

A report providing full bibliographic information on what my patrons borrowed from other institutions over a given time period. This would include not only items currently out on a GE loan, but all items from other schools that went out to my patrons and were subsequently returned. In the current system, we have no way to get at what our patrons borrow once the loan transaction is completed. Note: I am not interested in which individuals borrowed what, just the patron groups, but I do want author, title, isbn, publisher, date, LC class (especially)

Would like the ability to sort titles by bib# or LC classification

Question 7 Responses: Provide an example scenario for which you would run a report using Voyager that you might need to run in Alma on a regular basis.

I would like to measure use data by additional criteria such as publisher name.

1) A report that would pull up any active Voyager patrons who do not have an email address in their records 2) Report to get list of Faculty and staff with exp date within a period of roughly 1 year prior and 6 months after the current date.

Cataloging: Reporting of the number of holdings per bib record and the number of items per holding, without using Totals queries in Access. One way of accomplishing this is by 1) adding a reportable field with the number of holding records per bib record in the BIB_MASTER table, and 2) adding a reportable field containing the number of item records per holding record in the MFHD_MASTER table. Acquisitions: "Something that would automate certain metrics, designed to cater to the specific templates from various national reporting agencies would be nice." In general, people wish that information was easier to find. As it is, crafting reports through Access can be difficult for people who don't use Access on a consistent basis.

Number of times ebook links are clicked in the catalog Ability to separate any report by library Ability to run a report for bib/holdings/item for any Marc field or subfield

It might be nice to be able to run reports that include data from libraries other than our own, to compare statistics. Also it is difficult to filter and purge patrons based on criteria other than expiration date.

collection age report report of circulations by certain patron demographics, such as year in school (freshman, sophomore, etc.) catalog search terms how many times URLs in catalog records are clicked reports of e-resource license terms -- such as

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all resources available for ILL reports to help keep track of perpetual access holdings; what the library still has access rights to post-cancellation

I would like to run all of the reports that I currently run in Voyager in the ALMA environment. They are all important to our library's mission and assessment needs.

Circulation statistics

Reserve Textbook Collection Usage Statistics List

All Voyager Circulation Reports will need to carry over in Alma. All reports I run in Voyager are important such as: overdue, fine, cancellation, transaction, items available, and courtesy notices. Same is true for Item Status Reports, if staff are able to follow-up with items marked Lost – Library System Applied, the library is in an improved position of getting most books from patrons before they really are lost. Librarians ask for a summary of their monograph funds, or a total expenditure report. Also, which titles they selected are currently open orders.

Voyager Reporter needed daily to generate and email patron notices for overdues; Over-ride reports needed for overview of over-rides; Patron Overdue report by campus location and by number of days overdue that includes information needed to add and remove Banner holds; GIL Express blocking report needed so that we can make extra efforts to contact patrons with overdue UB items; Need a better Shelf-list report than the one provided in the Voyager Access Reports for inventory tasks that we do on an ongoing basis-improved with customizable fonts, size, lines per page like the one that used to be available in the VRS reports.

1. Want to know what circulated in the previous month. 2. For discipline accreditation reports, need a count or list of titles in a call # range.

I would like to run a report showing titles that have a status of lost or missing that have circulated X times (I need to be able to change the number of times) before they were lost. I would like to run a report to identify titles in a specific LC class range that haven't circulated in X number of years so that I could move them to storage.

See All Reports listed in #1; ALSO, Circ Item Status report

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One vital thing is a series of custom reports for graduating students each semester to make sure we get everything back. We get an Excel spreadsheet from the registrar which we import to MS Access to query against Voyager. The same process may be possible through a batch process in Alma to update the patron records with a statistical code.

Cataloging: We will need to run a query that identifies the bib IDs of titles from a vendor-supplied deleted titles list, matching on the vendor system number. For example, we perform monthly Ebrary collection maintenance using the 035 in the vendor-supplied delete records as a match point. Circulation: I need to know which patrons have \$10 or more in fines so that I can add Banner holds to their university accounts. Acquisitions: I try to run a monthly report that tell us which titles have been received by the library and who the requestor was. This is printed and distributed to the selectors. It would be nice if this was something we could email instead of printing because during heavy order periods I butcher an entire forest printing this stuff

book charge browse

No

It is useful to be able to run lists of Bib IDs by location, format, status for use in Global Data Change for data cleanup. For example, we may need to add or edit a local holding code in the local holding field 049, or edit information in a local notes field such as 599. It would be convenient to be able to run reports of MARC records containing (or not containing) certain fields and returning a list of those Bib IDs.

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Question 8 Responses: Do you have any questions or comments regarding Alma Analytics not addressed by questions 1 - 7?

No

No

No

No.

NO

We've been assured that ALMA provides easy customization of existing reports and easy creation of new reports. We are concerned about the allowed customization meeting all of our reporting needs and the accuracy of the reports and the ease of creating new reports, as we don't have SQL expertise. There is information on Voyager reports that I cannot show my President during budget hearings because it is incorrect., so we also are concerned about accuracy. Also, will all of the reports export to Excel? Are the reports printer-friendly with customizable fonts, size, items per line, etc. so as not to waste paper? There are other reports that Systems Librarians at other institutions can create in Access that we don't have the expertise to create locally This is very frustrating, as is getting reports run for us with the criteria we need.

I do a LOT of 1-off (i.e. custom) reports, and I rarely use the canned reports or the Access Reports. The most important thing for me to have is not this or that report, but a reporting tool that lets me build an SQL query (like SQL Tools), run it, and then put the results in Excel for further modification or analysis. Examples: 1. List of faculty/staff patrons who's records are about to expire. 2. List of suppressed bib records linked to unsuppressed holdings records. 3. List of suppressed holding records linked to unsuppressed bib records. 4. List of items given the 'Withdrawn' status between two given dates. 5. List of items circulated including item type, patron group, and LC classification. 6. List of deselection candidates (list based on time in collection, historical charges, and call number range. 7. List of titles circulating in a given period, including item type, patron group, LC class. I cannot overstate the importance of having full access to a capable, robust reporting tool.

Will ALMA have a link checker?

Acquisitions: My biggest hope is that Alma allows some sort of independent query building function because there are always reporting requests that come out of left field, and sometimes we realize we can use Voyager to isolate the info that's

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been requested. Note: The responses given above were gathered from a number of individuals and departments (identified in front of response) at the University of West Georgia.

Will Alma have canned reports similar to what's available with Voyager?

Will Alma allow us to export reports as excel, csv, or xml? Will we be able to schedule reports to run at specific times? Can we share report queries with other institutions?

is it possible to display the widgets found in the dashboard in a libguide or webpage?