

Assessment Team Updates & Demo: Alma Analytics

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Assessment Team Members

- Rod Bustos (GRU)
- Jay Forrest (Ga Tech**)
- Debbie Holmes (CCGA)
- Michael Holt (VSU*)
- Marty Tanner Hughes (UGA*)
- Jennifer Jones (GSU)
- Jeff Mortimore (Ga Southern*)
- Vicki Parsons (Ga Gwinnett)
- Deborah Prosser (UNG)
 - Emily Thornton (to replace Prosser)
- Robert Quarles (Atlanta Metro)

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** Ga Tech/Emory collaboration

Consultation Team Members

- Owen Angleton (AU)
- Bob Trotter (BOR)
- Caryl Nemajovsky (Darton St)
- Jackey Hong (Ga Tech**)
- David Lower (Ga Southern*)
- Clement Lau (Ga Southern*)
- Tricia Clayton (Ga State)
- Li Chen (Kennesaw State)
- Yolanda Crosby (South Ga State)
- Marty Tanner Hughes (UGA*)
- Rachel Parnell (UGA*)
- Viki Timian (UGA*)
- Mary Poland (UGA*)
- Simon Hunt (UGA*)
- Nan McMurray (UGA*)
- Miriam Nauenburg (UWG)
- Thomas Waters (UWG)

Charge

- “What can Analytics do?”
- “ How does Analytics work?”
- “How can we streamline reporting and data analysis so we do things once and do things the same?”

What We Knew We Needed...

- ability to consistently and easily run regular reports that are done daily, weekly, and monthly
- flexibility to easily write new reports based on discreet, specific questions that may arise relative to initiatives such as accreditation
- ability to seamlessly export reports into Word and Excel formats
- format (font size, etc.) and print reports easily

Team Activities

- Conducted survey, analyzed results, and presented at [GUGM 2016](#)
 - Formed Analytics Consultation Team
- Reviewed documentation from Cal State and Orbis Cascade
- Participated in 2 online Analytics webinars
- Participated in 2-day Analytics onsite training
- Participated in Alma training sessions held in Athens
- Monitored questions on g3Instleads & g3assess listservs, and Basecamp
- Documented findings on Assessment wiki and [training](#) sites
- Created [Recommendations Report](#)
- Provide training sessions

Recommendations

- Hire dedicated GIL Support Staff member. This person would solely be responsible for running reports for individual institutions and for consortium reports, and serve as the key contact for answering Analytics questions. This person will also serve as GIL liaison to the GIL Assessment-Analytics Team.
 - **Current GIL Support staff position to be restructured to fulfill this recommendation.**
- Retain the Analytics Consultation Team consisting of library personnel representing each USG institution. This team serves as a team of experts or those interested in Analytics to help answer Analytics questions.
 - **Assessment Team will be charged as a permanent GIL Functional Team**
- The Assessment Functional and Analytics Consultation Teams shall become the GIL Assessment & Analytics Team (meeting regularly at GUGM conferences and electronically as needed).
 - **Analytics and Consultation Teams will be combined and charged as a permanent GIL Functional Team**

Recommendations

- Create a separate test environment/Alma sandbox during institutional training.
 - Sandboxes will be forthcoming (possibly in July).
- Develop Analytics training schedule as appropriate for each institution and follow the suggested outline of videos presented in Tables 1 & 2 of the Recommendations Report.
 - Training site is available. Additional training will be proposed and conducted as needed.
- Adopt the shared reports presented by Bob Trotter as well as those presented by Cal State.
 - Reports adopted and being used.
- Use the Cal State Alma Analytics Data Testing Plan as a guide for testing data using Alma Analytics.
 - Completed during testing phase.

Recommendations

- **Analytics Report Naming Scheme**

- In the Shared folder, you will be presenting your analytic to users who won't know the context of your work. Therefore, please try to be as precise and descriptive as possible in naming your analytic. As these reports will only be accessed by fellow Analytics users, feel free to get technical and employ language as it applies within Alma Analytics. In the description field, mention search criteria, filters and/or prompts used, and how the analysis results are displayed (list, pie chart, graph, etc.) Include your contact email if you are willing to answer questions or receive feedback about your analytic.

Example Format:

Title: Title count - Material Type Map (Physical) 2016 – Institution Name/Code

Description: A count of all Physical Resource types filtered by Material Type=Map with a Creation Date equal to or less than 12/31/2016, that are not suppressed from discovery.

Recommendations

- Tips for Creating Analytics folders/subfolders
 - Use folders/subfolders naming scheme and categorization similar to UWisconsin (Shared Folders\Community\Reports\Institutions\UWisconsin) and Orbis Cascade Alliance (Shared Folders\Community\Reports\Institutions\Orbis Cascade Alliance)
 - Assessment Team will review, edit, and add folders and subfolders
 - Procedures to be defined and shared soon
 - Suggestions for new folders and subfolders will be reviewed by Assessment Team before they are added. Send ideas to any Assessment team members.

Recommendations

- Duplicate Analytics reports
 - Those running and saving reports to the analytics folders are strongly discouraged from saving duplicates of or modified versions of out-of-the box reports especially if those versions are test reports. Only unique reports ready for use will be added to the folders/subfolders. Seek input from any Assessment team member if there is uncertainty.

Brief Analytics Demo & Resources

- [Accessing](#) & Utilizing Analytics
 - Must have Design Analytics role added
- Assessment [Report](#) & [Training](#) page
 - Tips, Recommendations, Training videos & documentation
 - Function and Consultation Team membership list with email addresses

Questions



**We will get through it together! Remember your Consultation Team members...
Our work continues after Go-Live!**