

# **ERM Analytics in Alma**

January 30, 2020

Alana Nuth

## Goal of this Training:

- Discuss how Alma Analytics calculates cost per use
- Explore several out of the box Analytics reports in Alma that support electronic resources management and collection development activities
- Demonstrate simple options to modify these reports and create new reports
- Take a closer look at electronic collection overlap analysis and comparison

## **Required Roles:**

Design Analytics role is required to create new reports in Alma Analytics

## Of Note:

Most of the reports in Alma Analytics that support ERM are focused on measuring the value of subscriptions to electronic content. Reports measure value differently (some look at performance across vendors, other reports look at individual titles, compare cost-per-use, or analyze overlap across databases).

For these reports to run successfully, Alma must have access to both acquisitions and usage data. Many SUNY libraries did not migrate acquisitions data so Analytics may fail to run generate a report if a POL has not yet been created in Alma for a given resource. For those libraries that have not yet imported usage data (by either manually uploading COUNTER reports or setting up SUSHI), reports that rely on COUNTER data may include blank values.

The Analytics reports are as good as the data available in Alma. Be aware that reports that list the “top ten” of whatever metric would exclude resources, publishers, and platforms for which COUNTER and/or expenditure data is unavailable. The “top ten” reports therefore may not be an accurate representation as some resources may be excluded from the report.

**How does Alma Analytics calculate cost per use?**

## **Alma Analytics - Determining the price for cost per use for a portfolio which has its own POL of type Continuous**

<https://developers.exlibrisgroup.com/blog/alma-analytics-determining-the-price-for-cost-per-use-for-a-portfolio-which-has-its-own-pol-of-type-continuous/>

For portfolios with their own POL with a type Continuous, Analytics will calculate the cost per use based on the expenditure for that portfolio's POL in the given fiscal year.

## **Alma Analytics - Determining the price for cost per use for a portfolio which is part of a collection which has a POL of type Continuous**

<https://developers.exlibrisgroup.com/blog/alma-analytics-determining-the-price-for-cost-per-use-for-a-portfolio-which-is-part-of-a-collection-which-has-a-pol-of-type-continuous/>

Analytics will use the total expenditure for the electronic collection to which the portfolio belongs and divide the cost of the collection across all the portfolios to generate a "cost per portfolio." That cost per portfolio is used to calculate the cost per use for the portfolio.

## **Alma Analytics - Determining the price for cost per use for a portfolio which has its own POL of One Time**

<https://developers.exlibrisgroup.com/blog/alma-analytics-determining-the-price-for-cost-per-use-for-a-portfolio-which-has-its-own-pol-of-type-one-time/>

Analytics will divide the cost of the one time expenditure across the number of fiscal years which has passed since the purchase. Each fiscal year gets a cost per year (which is equal across fiscal years) which is used to calculate the cost per use.

## **Alma Analytics - Determining the price for cost per use for a portfolio which is part of a collection which has a POL type of One Time**

<https://developers.exlibrisgroup.com/blog/alma-analytics-determining-the-price-for-cost-per-use-for-a-portfolio-which-is-part-of-a-collection-which-has-a-pol-of-type-one-time/>

Analytics uses the total price of the electronic collection POL and divides it by the number of portfolios. Then, the cost per portfolio is divided by the number of fiscal years since the purchase to generate a cost per year for each portfolio.

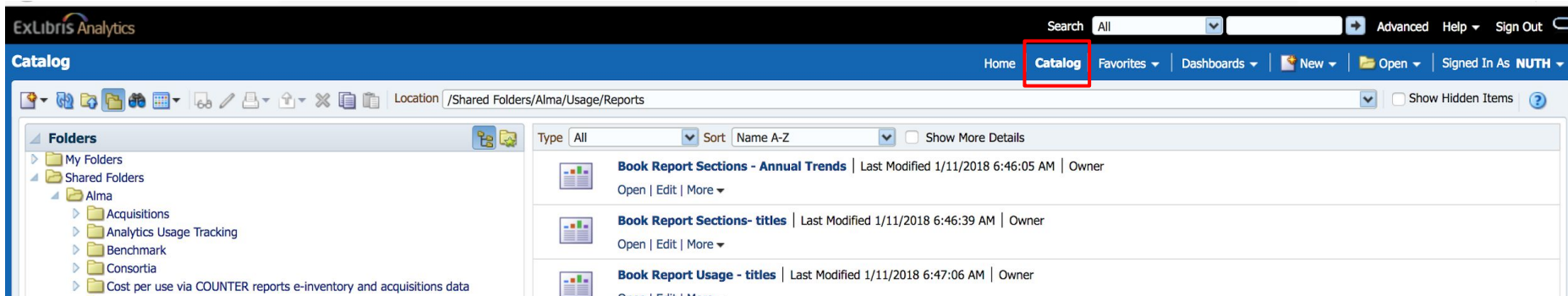
**A tour of out of the box  
Analytics dashboards and reports  
that support ERM:**



# Alma Analytics

## Out of the Box Reports Most Relevant to ERM

Alma → Analytics → Design Analytics  
Catalog



The screenshot displays the ExLibris Analytics Catalog interface. The top navigation bar includes the ExLibris Analytics logo, a search bar, and links for Advanced, Help, and Sign Out. The main navigation bar features the 'Catalog' tab, which is highlighted with a red box, along with other tabs like Home, Favorites, Dashboards, New, Open, and Signed In As NUTH.

The interface shows a folder structure on the left under 'Shared Folders/Alma/Usage/Reports'. The 'Alma' folder is expanded, revealing sub-folders: Acquisitions, Analytics Usage Tracking, Benchmark, Consortia, and Cost per use via COUNTER reports e-inventory and acquisitions data.

The main content area displays a list of reports with the following details:

Type	Sort	Show More Details
All <td>Name A-Z<td><input type="checkbox"/></td></td>	Name A-Z <td><input type="checkbox"/></td>	<input type="checkbox"/>

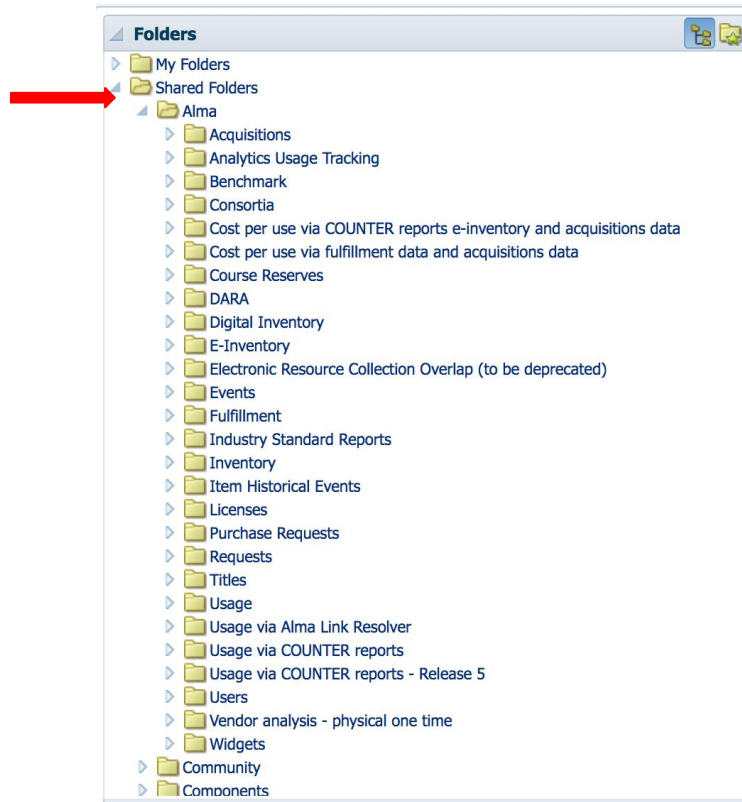
Report Name	Last Modified	Owner
<b>Book Report Sections - Annual Trends</b>	1/11/2018 6:46:05 AM	Owner
<b>Book Report Sections- titles</b>	1/11/2018 6:46:39 AM	Owner
<b>Book Report Usage - titles</b>	1/11/2018 6:47:06 AM	Owner

# Alma Analytics

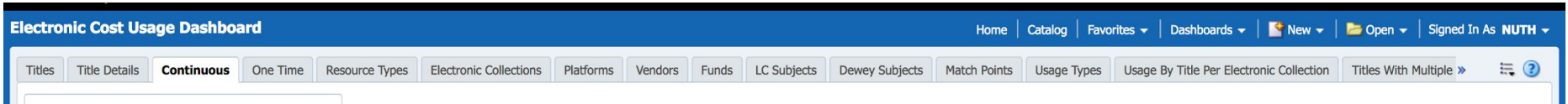
## Out of the Box Dashboards Most Relevant to ERM

Shared Folders → Alma

- Electronic Cost Usage Dashboard
- Electronic Resource Collection Overlap
- Usage via Alma Link Resolver
- Usage via COUNTER reports
- Usage via COUNTER reports (Release 5)



# Electronic Cost Usage Dashboard



The screenshot shows the top navigation bar of the 'Electronic Cost Usage Dashboard'. The title 'Electronic Cost Usage Dashboard' is on the left. On the right, there are links for 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As NUTH'. Below this is a horizontal menu with tabs: 'Titles', 'Title Details', 'Continuous' (which is highlighted), 'One Time', 'Resource Types', 'Electronic Collections', 'Platforms', 'Vendors', 'Funds', 'LC Subjects', 'Dewey Subjects', 'Match Points', 'Usage Types', 'Usage By Title Per Electronic Collection', and 'Titles With Multiple'. There are also icons for a list and help on the far right.

Questions reports within this dashboard can answer:

- What is the cost per use for the library's licensed electronic collections and portfolios?
- What is the cost per use for individual one-time and continuous POLs?
- What are the library's most and least expensive vendors?
- What is the cost per use according to vendor, LC subject, Dewey subject, or resource type?

Data used:

- COUNTER usage data (BR1, BR2, JR1, JR1a, and JR1GOA)
- acquisitions information (POLs)
- e-inventory information

# Titles

- Measures cost per use according to bibliographic title
- Cost per use is calculated both for portfolios with a POL and for portfolios without a POL
- Generates a chart and table of the ten most expensive titles based on POL cost data and COUNTER data

## Filters

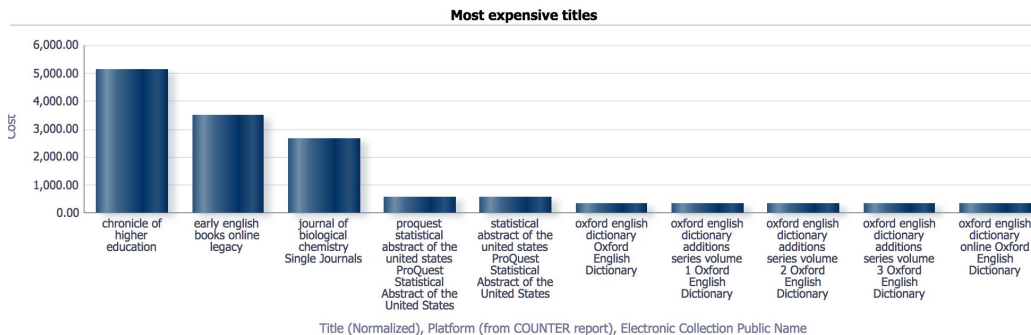
Fiscal Period Description is equal to **FY-2020**

**and** Title (Normalized) is not null

**and** Usage - Total is greater than **0**

**and** Usage - Total is in top **10**

**and** Has Usage is equal to **Yes**



Title (Normalized)	Electronic Collection Public Name	Platform (from COUNTER report)	Cost	Usage	Cost Per Use
chronicle of higher education			5,124.00	0.00	
early english books online legacy			3,503.59	0.00	
journal of biological chemistry	Single Journals		2,660.00	0.00	
proquest statistical abstract of the united states	ProQuest Statistical Abstract of the United States		586.04	0.00	
statistical abstract of the united states	ProQuest Statistical Abstract of the United States		586.04	0.00	
oxford english dictionary	Oxford English Dictionary		365.61	0.00	
oxford english dictionary additions series volume 1	Oxford English Dictionary		365.61	0.00	
oxford english dictionary additions series volume 2	Oxford English Dictionary		365.61	0.00	
oxford english dictionary additions series volume 3	Oxford English Dictionary		365.61	0.00	
oxford english dictionary online	Oxford English Dictionary		365.61	0.00	

# Title Details

- Details of a selected bibliographic title with electronic collection, vendor, and platform information and cost per use

**Electronic Cost Usage Dashboard**

Titles **Title Details** Continuous One Time

Title: chronicle of higher education

Fiscal Period: FY-2020

Has Cost: Yes

Has Usage: Yes

OK Reset

## Electronic Cost Usage Dashboard

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

### Title details filtered by:

Title = journal of biological chemistry , ISSN = (All) , ISBN = (All)  
Fiscal Year = FY-2020

Title (Normalized)	Electronic Collection Public Name	ISSN (Normalized)	ISBN	Vendor Name	Platform (from COUNTER report)	Fiscal Period Description	PO Line Reference	Cost	Usage	Cost Per Use
journal of biological chemistry	Single Journals	1083351X; 00219258		AMERICAN SOCIETY FOR BIOCHEMISTRY AND MOLECULAR BIOLOGY		FY-2020	POL-586	2,660.00	0.00	

[Return](#) - [Create Bookmark Link](#)

# Continuous

- Cost per use for portfolios with a continuous order, both in an electronic collection and standalone portfolios
- Report calculates cost per use when a POL is available and when a POL is not available
- Report generates a table

ExLibris Analytics

Search   [Advanced](#) [Help](#) [Sign Out](#)

**Electronic Cost Usage Dashboard** [Home](#) [Catalog](#) [Favorites](#) [Dashboards](#) [New](#) [Open](#) [Signed In As NUTH](#)

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[LC Subjects](#)
[Dewey Subjects](#)
[Match Points](#)
[Usage Types](#)
[Usage By Title Per Electronic Collection](#)
[Titles With Multiple](#)

Portfolio Creation Date >= 01/25/2019

Cost >=

Usage >=

Has Cost: Yes

Has Usage: Yes

MMS Id	Title (Normalized)	Electronic Collection Public Name	Platform (from COUNTER report)	Cost	Usage	Cost Per Use	No. of Portfolio (In Repository)
995344989004833	american law magazine	HeinOnline Law Journal Library		0.80	0.00		1
995345012604833	proceedings of the american philosophical society	Social Science Premium Collection		3.28	0.00		1
995345045804833	chronicle of higher education			5,124.00	0.00		1
995345052804833	new politics	Social Science Premium Collection		3.28	0.00		1
995345053004833	national journal	Social Science Premium Collection		3.28	0.00		1
995345054504833	washington report on middle east affairs	Social Science Premium Collection		3.28	0.00		1
995345055104833	human life review	Social Science Premium Collection		3.28	0.00		1
995345057304833	world factbook	Social Science Premium Collection		3.28	0.00		1
995345058004833	human events	Social Science Premium Collection		3.28	0.00		1
995345058104833	humanity society	Social Science Premium Collection		3.28	0.00		1
995345058204833	current science	Social Science Premium Collection		3.28	0.00		1
995345058304833	current events	Social Science Premium Collection		3.28	0.00		1

# One Time

- Cost per use for portfolios with a one time order, both in an electronic collection and standalone portfolios
- Report calculates cost per use when a POL is available and when a POL is not available
- Report generates a table

ExLibris Analytics  
Electronic Cost Usage Dashboard

Titles Title Details Continuous **One Time** Resou

Portfolio Creation Date  $\geq$  01/25/2019

Cost  $\geq$

Usage  $\geq$

Has Cost Yes

Has Usage Yes

Searching... To cancel, click [here](#).

ExLibris Analytics  
Electronic Cost Usage Dashboard

Home Catalog Favorites Dashboards New Open Signed In As NUTH

Titles Title Details Continuous **One Time** Resource Types Electronic Collections Platforms Vendors Funds LC Subjects Dewey Subjects Match Points Usage Types Usage By Title Per Electronic Collection Titles With Multiple I

Portfolio Creation Date  $\geq$  01/25/2019

Cost  $\geq$

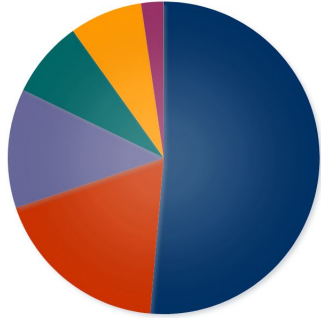
Usage  $\geq$

Has Cost Yes

Has Usage Yes

**One Time**

MMS Id	Title (Normalized)	Electronic Collection Public Name	Platform (from COUNTER report)	Cost	Usage	Cost Per Use	No. of Portfolio (In Repository)
995353025004833	clinical interventions with gang adolescents and their families	Alexander Street Press counseling & psychotherapy transcripts client narratives		11.03	0.00		1
995361960004833	city unseen new visions of an urban planet	De Gruyter Online		59.50	0.00		1
995374452804833	ocean circulation	Elsevier ScienceDirect Books 1995-2006		48.00	0.00		1
995401758804833	el cacao			350.00	0.00		1
995433933504833	day the voices stopped a memoir of madness and hope	Alexander Street Press counseling & psychotherapy transcripts client narratives		11.03	0.00		1
995433933604833	client 304 female in her mid thirties she has a history of dieting and restricting herself due to being a dancer in her youth she has relapsed several times but has remained abstinent for the last 6 months in therapy	Alexander Street Press counseling & psychotherapy transcripts client narratives		11.03	0.00		1
995433933704833	client 303 female in her mid forties who left the group therapy sessions recently and relapsed she is now working harder and with more commitment to her recovery	Alexander Street Press counseling & psychotherapy transcripts client narratives		11.03	0.00		1
995433933804833	group therapy 302 this group is made up of 8 women ranging in age from mid twenties to late fifties they range in length of abstinence from over 7 years to less than 1 year	Alexander Street Press counseling & psychotherapy transcripts client narratives		11.03	0.00		1



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Cost

- Journal - Electronic
- Other Serial - Electronic
- Book - Electronic
- Collection
- Journal (Ceased publication) - Electronic
- Other Serial (Ceased publication) - Electronic
- Projected medium - Electronic
- Newspaper - Electronic

## Resource Types

- Cost per use by resource type
- Report generates a table as well as a pie chart

- The 1st pie called "Cost" is all titles in the E-Inventory subject area which have a POL with a fund expenditure. They may or may not match a title from a COUNTER report. If they do not match a title from a COUNTER report then they will be in the "None" section. The pie chart shows the resource type of the bibliographic record.
- The 2nd pie called "Usage" is all titles in the E-Inventory subject area which have a match on a title from a COUNTER report. They may or may not have a POL with a fund expenditure. The pie chart shows the resource type of the bibliographic record.
- The 3rd pie called "Cost Per Use" is all titles in the E-Inventory subject area which have a have a POL with a fund expenditure and a match on a title from a COUNTER report. The pie chart shows the resource type of the bibliographic record.

Resource Type	Cost	Usage	Cost Per Use	No. of Portfolio (In Repository)
Journal - Electronic	24,948.48	0.00		92,619
Other Serial - Electronic	8,949.48	0.00		88,167
Book - Electronic	5,981.85	0.00		394,579
Collection	3,869.20	0.00		4
Journal (Ceased publication) - Electronic	3,667.38	0.00		18,642
Other Serial (Ceased publication) - Electronic	1,113.23	0.00		1,699
Audio musical - Electronic	11.12	0.00		123
Newspaper - Electronic	6.55	0.00		1,808
Projected medium - Electronic	0.29	0.00		38,938



# Electronic Collections

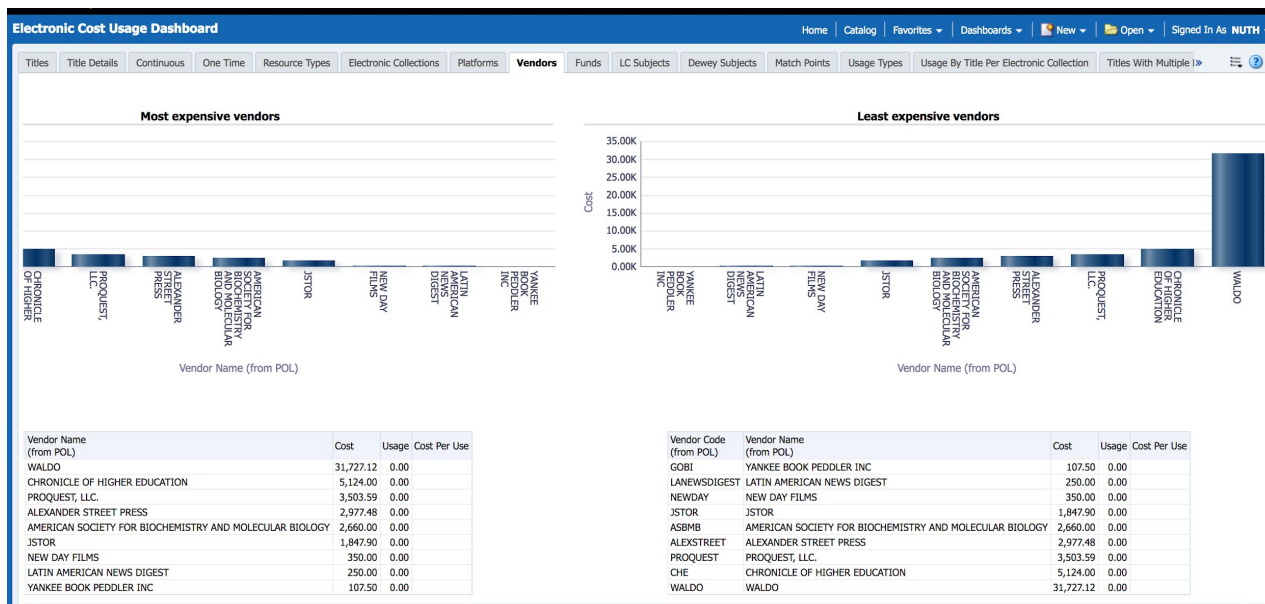
- Cost per use for electronic collections with a prompt for fiscal year
- Report generates a table

The screenshot displays the 'Electronic Cost Usage Dashboard' with a navigation menu at the top. The 'Electronic Collections' tab is selected. Below the navigation, there is a 'Fiscal Period Description' dropdown menu set to 'FY-2020', with 'Apply' and 'Reset' buttons. The main content area is titled 'Cost Usage By Electronic collections' and contains a table with the following data:

Electronic Collection Public Name	Platform (from COUNTER report)	No. of Portfolio (In Repository)	Cost	Usage	Cost Per Use
PsycARTICLES		140	12,851.86	0.00	
Social Science Premium Collection		3,412	11,176.69	0.00	
Alexander Street Press counseling & psychotherapy transcripts client narratives		270	2,977.48	0.00	
Single Journals		1	2,660.00	0.00	
HeinOnline Law Journal Library		2,452	1,958.34	0.00	
Oxford English Dictionary		5	1,828.06	0.00	
JSTOR Journal Hosting Program		7	1,488.90	0.00	
ProQuest Statistical Abstract of the United States		2	1,172.07	0.00	
Columbia International Affairs Online (CIAO)		84	1,107.62	0.00	
Alexander Street Press Women and Social Movements in the US Basic Edition		10,198	982.58	0.00	
MathSciNet		3	649.91	0.00	
Miscellaneous Ejournals		1	250.00	0.00	
De Gruyter Online		1	59.50	0.00	
Elsevier ScienceDirect Books 1995-2006		1	48.00	0.00	

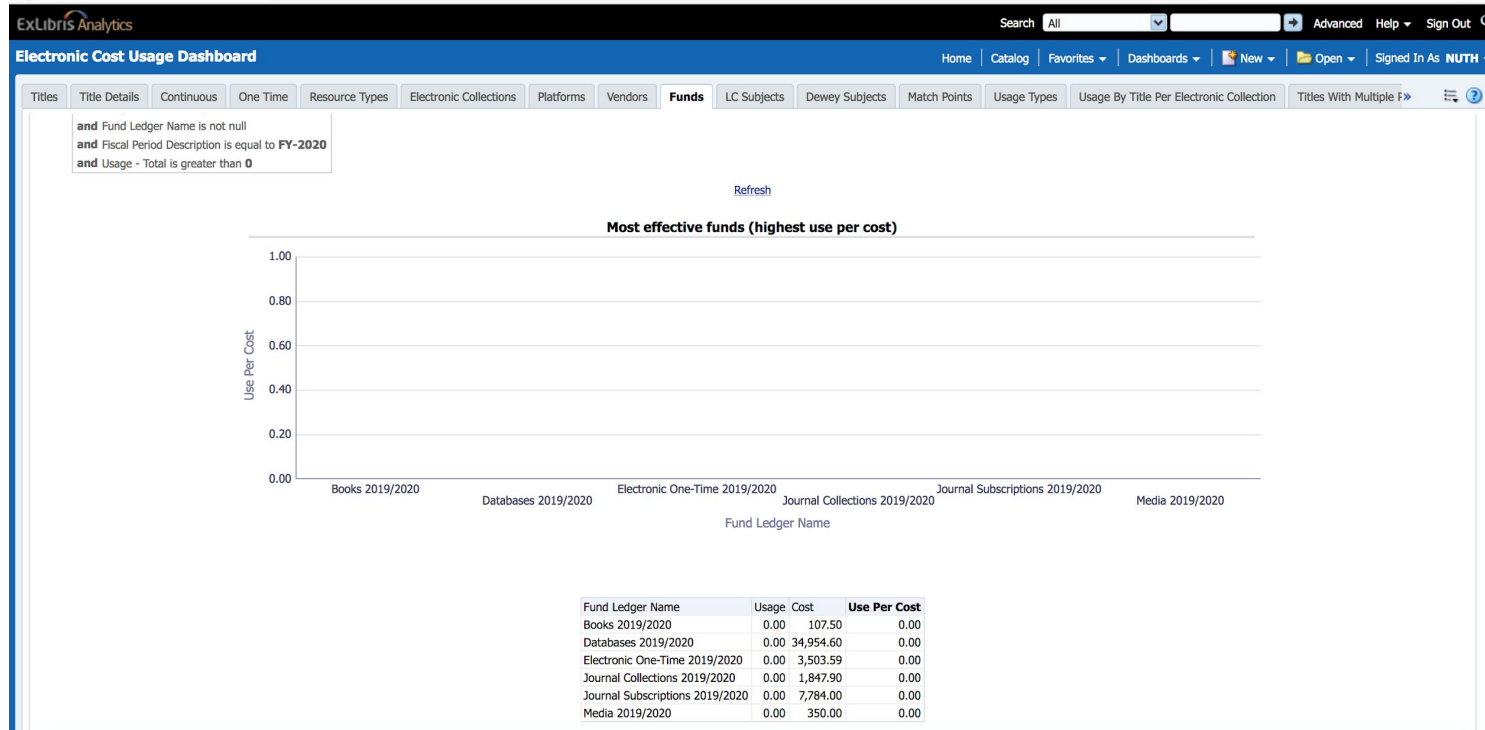
# Vendors

- A graph of the top most expensive vendors and a graph of the top least expensive vendors
- Corresponding tables with top ten most expensive and top ten least expensive vendors with cost per use across vendor (uses POL)



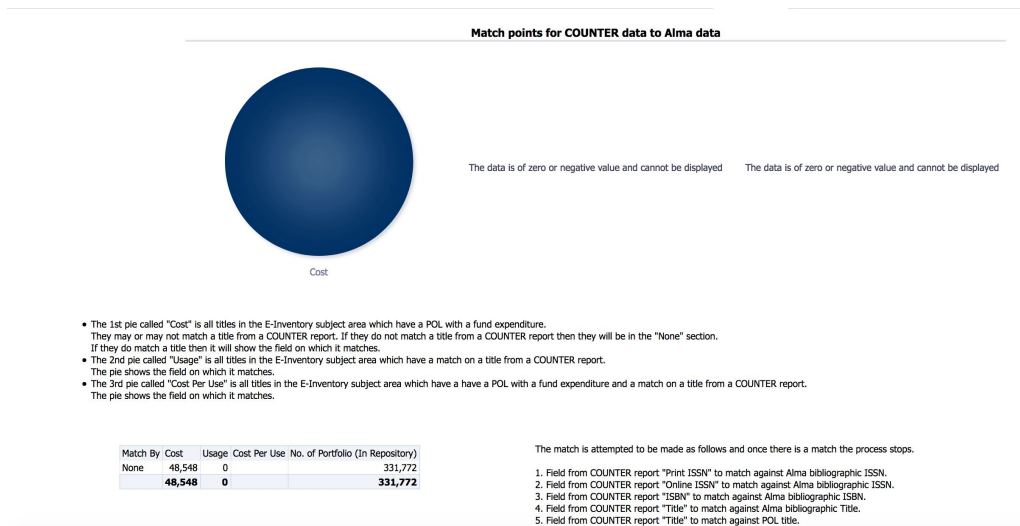
# Funds

- Most effective funds with the highest cost per use



# Match Points

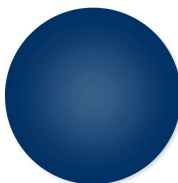
- A series of pie charts with the following information:
  - “Cost”: Electronic titles with a POL and expenditure
  - “Usage”: Electronic titles which match a title on a COUNTER report
  - “Cost per Use”: Electronic titles with both a POL and expenditure and that match a title on a COUNTER report



# Usage Type

- Cost per use by usage type
- A series of pie charts with the following information:
  - “Cost”: Electronic titles with a POL and expenditure
  - “Usage”: Electronic titles which match a title on a COUNTER report
  - “Cost per Use”: Electronic titles with both a POL and expenditure and that match a title on a COUNTER report, including report type

Match points for COUNTER data to Alma data



Cost

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- The 1st pie called “Cost” is all titles in the E-inventory subject area which have a POL with a fund expenditure. They may or may not match a title from a COUNTER report. If they do not match a title from a COUNTER report then they will be in the “None” section. If they do match a title then it will show the field on which it matches.
- The 2nd pie called “Usage” is all titles in the E-inventory subject area which have a match on a title from a COUNTER report. The pie shows the field on which it matches.
- The 3rd pie called “Cost Per Use” is all titles in the E-inventory subject area which have a POL with a fund expenditure and a match on a title from a COUNTER report. The pie shows the field on which it matches.

Match By	Cost	Usage	Cost Per Use	No. of Portfolio (In Repository)
None	48,548	0		331,772
	<b>48,548</b>	<b>0</b>		<b>331,772</b>

The match is attempted to be made as follows and once there is a match the process stops.

1. Field from COUNTER report “Print ISSN” to match against Alma bibliographic ISSN.
2. Field from COUNTER report “Online ISSN” to match against Alma bibliographic ISSN.
3. Field from COUNTER report “ISBN” to match against Alma bibliographic ISBN.
4. Field from COUNTER report “Title” to match against Alma bibliographic Title.
5. Field from COUNTER report “Title” to match against POL title.

# Usage by Title Per Electronic Collection

- A table organized by electronic collection with information on the number of portfolios in the collection, cost of the collection, usage of the collection, cost per use of the collection, and cost per title
- Prompt of fiscal year

Fiscal Period Description

**Usage by title per electronic collection**

Electronic Collection Public Name	No. of Titles	No. of Titles which have usage	Percent of Titles which have usage	Cost	Usage	Cost Per Use	Cost per Title
Single Journals	1	0	0.0%	2,660.00	0.00		2,660
ProQuest Statistical Abstract of the United States	2	0	0.0%	1,172.07	0.00		586
Oxford English Dictionary	5	0	0.0%	1,828.06	0.00		366
Miscellaneous Ejournals	1	0	0.0%	250.00	0.00		250
MathSciNet	3	0	0.0%	649.91	0.00		217
JSTOR Journal Hosting Program	7	0	0.0%	1,488.90	0.00		213
PsycARTICLES	136	0	0.0%	12,851.86	0.00		94
De Gruyter Online	1	0	0.0%	59.50	0.00		60
Elsevier ScienceDirect Books 1995-2006	1	0	0.0%	48.00	0.00		48
Columbia International Affairs Online (CIAO)	81	0	0.0%	1,107.62	0.00		14
Alexander Street Press counseling & psychotherapy transcripts client narratives	270	0	0.0%	2,977.48	0.00		11
Social Science Premium Collection	3,357	0	0.0%	11,176.69	0.00		3
HeinOnline Law Journal Library	2,275	0	0.0%	1,958.34	0.00		1
Alexander Street Press Women and Social Movements in the US Basic Edition	10,198	0	0.0%	982.58	0.00		0

# Electronic Resource Collection Overlap Dashboard

Questions reports within this dashboard can answer:

- Which portfolios are available in multiple electronic collections?
- For which portfolios can the library rely on access from aggregator and selective packages rather than a standalone subscription?
- Which electronic collections have the greatest overlap (and therefore could be considered for subscription cancellation)?

Data used:

- e-inventory information

# Active portfolios in multiple collections with prompt for a number of collections

- Generate a list of portfolios and their corresponding electronic collections
- Prompt for Number of Electronic Collections
- Sort the report by the Number of Electronic Collections column to see portfolios that are available in multiple collections (and therefore the greatest content overlap)

## Active portfolios in multiple collections with prompt fo...

Home | Catalog | Favorites ▾ | Dashboards ▾ |  New ▾ |  Open ▾

### Active portfolios in multiple collections with prompt for number of collections

Portfolio Title	Electronic Collection Public Name	Number of Electronic Collections
!Esplendores! Splendors of Mexico	Films on Demand	1
""History at Your Fingertips"" and ""Spirit of the Nation""	Federal Reserve Bank of Boston Publications	1
""Liberty"" and ""The American Eagle""	Federal Reserve Bank of Boston Publications	1
""Spirit of the Nation"" and ""History at Your Fingertips""	Federal Reserve Bank of Boston Publications	1
": מבט מהרפסיכואנליזה וממקום אחר" /	Historical Jewish Press	1
"A Dingo's Got My Baby" : Trial by Media /	Films on Demand	1
"A Dream" Remembered (8/28/03) /	Films on Demand	1
"A selected, pronouncing and accented dictionary	Gale Eighteenth Century Collections Online II	1
"A visible company of professionals": African Americans and the National Education Association during the civil rights movement /	EBSCOhost Education Research Complete	2
	EBSCOhost Education Source	2
"An Alt-Weekly for the Upper Crust" : Q&A with New York Observer Editor-in-Chief Ken Kurson /	Films on Demand	1
"Bomba" shrieks for help! vide appeal from Naples for foreign intervention. Vide Lord Palmerson's declaration in the House of Commons, June 12th; als	Early English Books Online	1
"Could You Patent the Sun?" /	Films on Demand	1
"Dropping out," drifting off, being excluded : becoming somebody without school /	EBSCOhost Education Research Complete	2



# All Active Portfolios in Multiple Collections (0-D, E-I, J-N, O-S, T-Z)

- Portfolios that are available in more than one collection. Portfolios that are available in five or more collections are highlighted in red font.
- Edit the report filter for COUNT(DISTINCT Electronic Collection is greater than or equal to" to select a higher number than the default "2" number of collections in which the portfolio is available

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the S# name in the catalog pane.

- AND "Portfolio"."Availability" = 'Available'
- AND Electronic Collection Public Name is not null
- AND Title is between 0 and DZ
- AND Lifecycle is not equal to / is not in DELETED; Deleted
- AND COUNT(DISTINCT Electronic Colle... is greater than or equal to 2

**Edit Filter**

Column: COUNT(DISTINCT Ele...

Operator: is greater than or equal to

Value: 2

Buttons: Add More Options, Clear All

Options:  Protect Filter,  Convert this filter to SQL

Buttons: OK, Cancel

## All active portfolios in multiple collections 0-D

### All active portfolios in multiple collections 0-D

Portfolio Title	Electronic Collection Public Name	Number of Electronic Collections
01 Communique Laboratory Inc. MarketLine Company Profile	EBSCOhost Business Source Alumni Edition	2
	EBSCOhost Business Source Complete	2
1-800 FLOWERS.COM, Inc. SWOT Analysis	EBSCOhost Business Source Alumni Edition	3
	EBSCOhost Business Source Complete	3
	EBSCOhost Entrepreneurial Studies Source	3
1-800-FLOWERS.COM, Inc. MarketLine Company Profile	EBSCOhost Business Source Alumni Edition	2

## Usage via Alma Link Resolver Dashboard

Questions reports within this dashboard can answer:

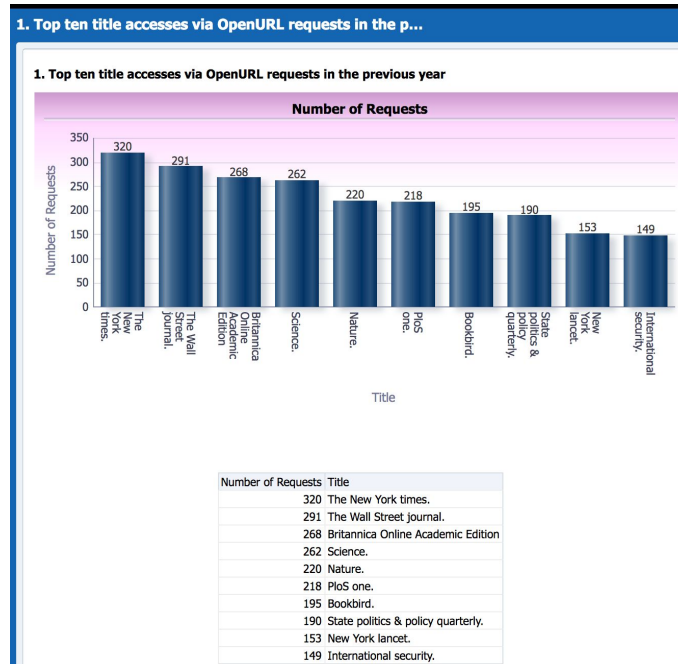
- Which electronic collections and portfolios are in the greatest or least demand?
- From this information, which electronic portfolios would be candidates to consider for acquisition and which electronic could be considered for subscription cancellation?
- A helpful compliment or alternative to COUNTER cost per use reports if COUNTER data is not yet loaded in Alma

Data used:

- Alma link resolver usage

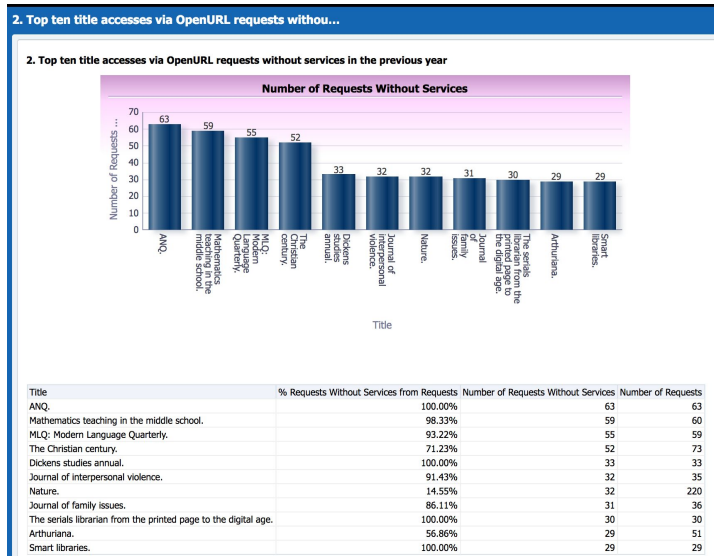
# Top ten title accesses via OpenURL requests in the previous year

- Top ten most requested titles via Alma link resolver in the previous year
- Most in demand titles in the last year
- Edit the report filters to see a different date range or more than the top ten title accesses



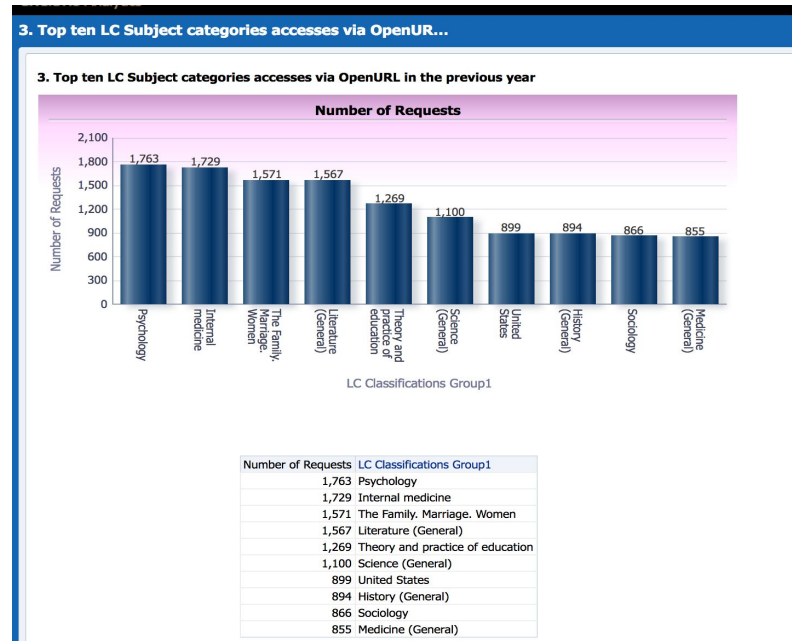
# Top ten title accesses via OpenURL requests without services in the previous year

- Top ten most requested titles via Alma link resolver in the previous year without services (i.e. full text available in another resource)
- Number and percent of requests without services as well as the total number of requests for the title



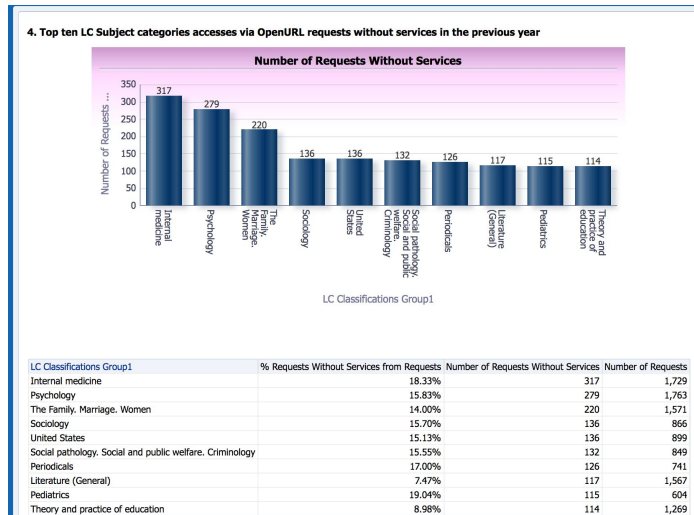
# Top ten LC subject categories accesses via OpenURL in the previous year

- The top ten most requested or most in demand LC subjects via the Alma link resolver
- Electronic materials from which subject areas get the most used



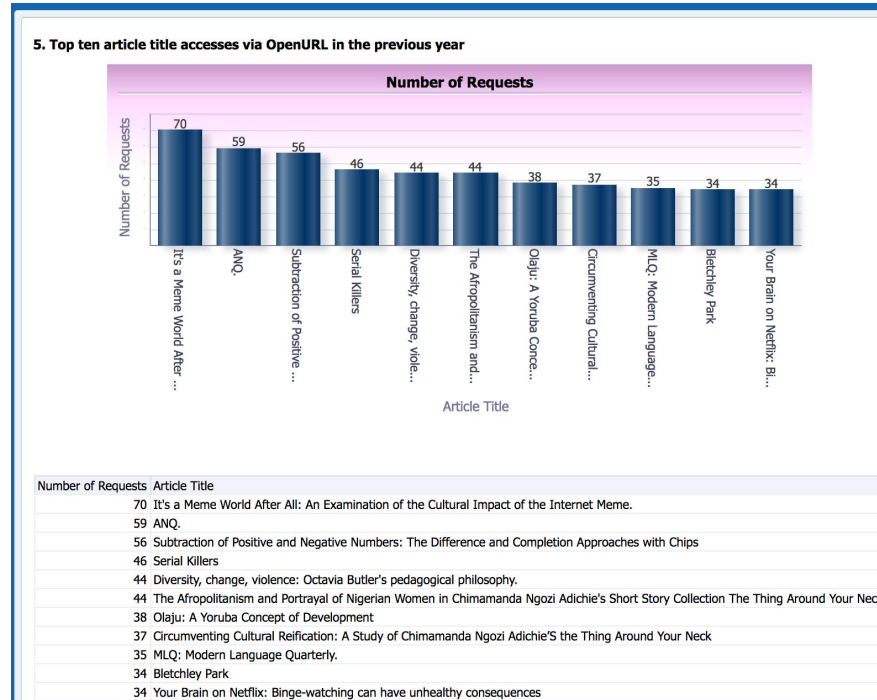
# Top ten LC subject categories accesses via OpenURL requests without services in the previous year

- The top ten most requested or most in demand LC subjects via the Alma link resolver for which services (i.e. electronic access in another resource, such as an aggregator database) is not available
- Electronic materials from which subject areas get the most requests that do not have full text availability



# Top ten article title accesses via OpenURL in the previous year

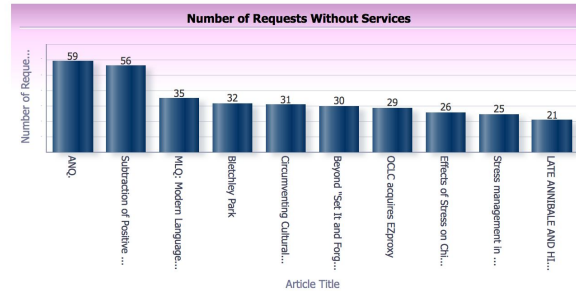
- The top ten most in demand articles via Alma link resolver in the previous year



# Top ten article title accesses via OpenURL requests without services in the previous year

- The top ten most requested or most in demand articles via the Alma link resolver for which services (i.e. electronic access in another resource, such as an aggregator database) is not available
- Number and percent of requests without services as well as the total number of requests for the article

6. Top ten article title accesses via OpenURL requests without services in the previous year

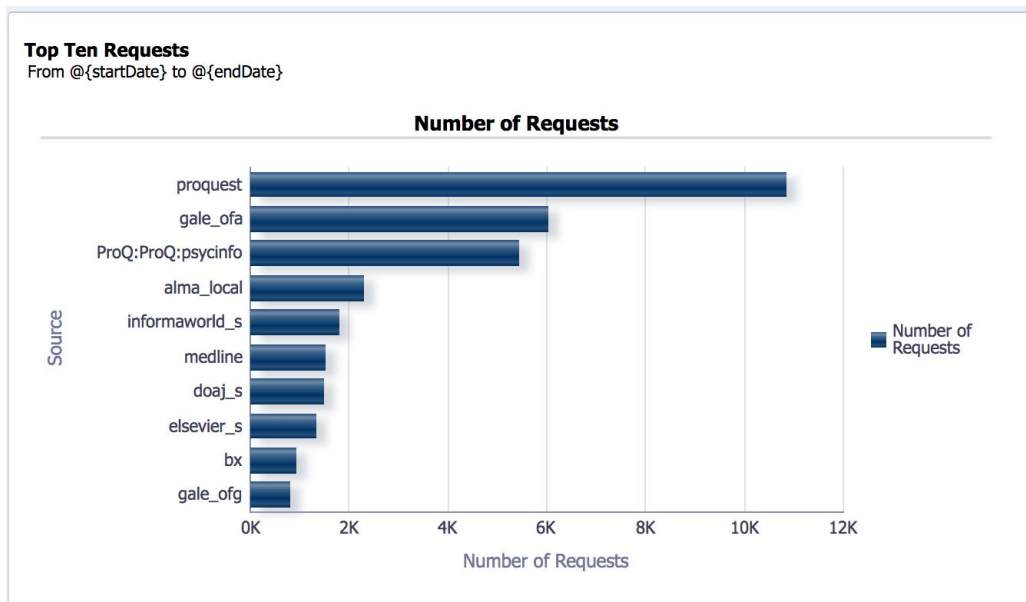


Article Title	% Requests Without Services from Requests	Number of Requests Without Services	Number of Requests
ANQ.	100.00%	59	59
Subtraction of Positive and Negative Numbers: The Difference and Completion Approaches with Chips	100.00%	56	56
MLQ: Modern Language Quarterly.	100.00%	35	35
Bletchley Park	94.12%	32	34
Circumventing Cultural Reification: A Study of Chimamanda Ngozi Adichie's The Thing Around Your Neck	83.78%	31	37
Beyond "Set It and Forget It": Proactively Managing Your EZproxy Server.	100.00%	30	30
OCLC acquires EZproxy	100.00%	29	29
Effects of Stress on Children Examined	100.00%	26	26
Stress management in children: A pilot study in 7 to 9 year olds	100.00%	25	25
LATE ANNIBALE AND HIS WORKSHOP: INVENTION, IMITATION AND PATRONAGE	100.00%	21	21



# Top ten requests

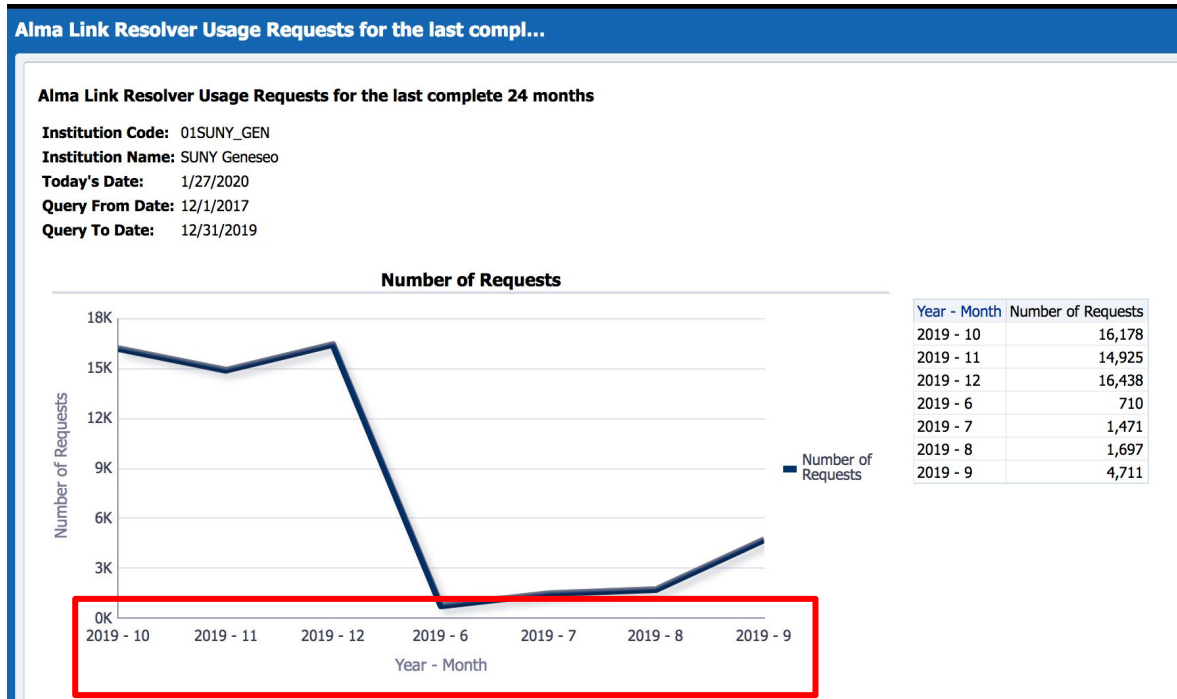
- Platforms with the greatest number of requests for full text access; the platforms users are seeking to access via the Alma link resolver for full text access





# Alma Link Resolver Usage Requests for the last 24 months

- How often your instance of the Alma link resolver was used during the last 24 months



# Alma Link Resolver Usage Requests from Primo and not Primo for the last complete 24 months

- Total number of requests or uses of the Alma link resolver and total number of requests which originated in Primo



## Usage via COUNTER reports Dashboard

Questions reports within this dashboard can answer:

- Which books, journals, and databases are the most and least used?
- How often are journal articles requested according to year of publication?
- What are the most used titles, platforms, and publishers?
- What are the top ten most highly used titles?

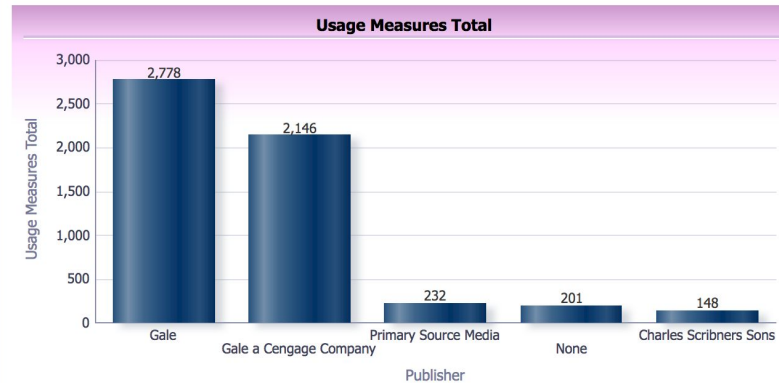
Data used:

- COUNTER R4 usage data

# Usage Data - Books - top 5 used publishers to access ebooks in the previous calendar year

- The top five most accessed publishers of ebooks

02. Usage Data - Books - top 5 used publishers to access eBooks in the previous calendar year



Publisher	Success Section Requests	Success Title Requests	Usage Measures Total
Gale	2,778	0	2,778
Gale a Cengage Company	2,146	0	2,146
Primary Source Media	232	0	232
None	201	0	201
Charles Scribners Sons	148	0	148

# Usage Data - Books - top 5 least used publishers to access ebooks in the previous calendar year

- Publishers with the least ebook usage during the previous calendar year

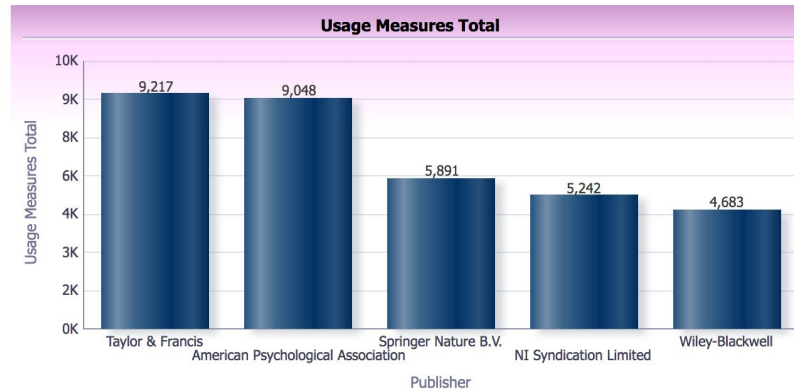
**04. Usage Data - Books - least used publishers to access eBooks in the previous calendar year**

Publisher	Success Section Requests	Success Title Requests	Usage Measures Total
A & C Black Publishers Ltd	6	0	6
ABC-CLIO Interactive	0	3	3
Abdo Publishing Company	2	0	2
Adva Center	1	0	1
Alex Catalogue	0	7	7
Alpha Books	0	2	2
American Psychological Association (APA)	4	6	10
Atlantic Publishing Group, Inc.	1	0	1
Bergin & Garvey	0	1	1
Berrett-Koehler	0	1	1
Blackbirch Press	3	0	3
CQ-Roll Call, Inc.	1	0	1
Cambridge University Press	0	1	1
CapStone Press	1	0	1
Cato Institute	1	0	1
Center for Creative Leadership	3	0	3
Central Intelligence Agency	2	0	2
Chelsea House Publishers	4	0	4
Christian Classics Ethereal Library	0	1	1
Clio Press	0	1	1
Crabtree Publishing	3	0	3
Crimson Business Ltd.	0	1	1
Edinburgh University Press	0	3	3
Elsevier Inc. (Mosby)	1	0	1
Emergo Publishing	0	1	1
Enciclopedia Catalana SAU	2	0	2
Encyclopedia Britannica Inc.	10	0	10
EnerKnol	1	0	1
Equal Opportunity Publications Incorporated	1	0	1
Excelsior Editions	0	1	1
Fodors Travel a division of Random House Inc.	1	0	1

# Usage Data - Journals - top 5 used publishers for article usage in the previous year

- Which publisher's journal content users used the most often during the previous year

06. Usage Data - Journals - top 5 used publishers for article usage in the previous calendar year



Publisher	Usage Measures Total
Taylor & Francis	9,217
American Psychological Association	9,048
Springer Nature B.V.	5,891
NI Syndication Limited	5,242
Wiley-Blackwell	4,683



# Usage Data - Journals - least used publishers for article usage in the previous calendar year

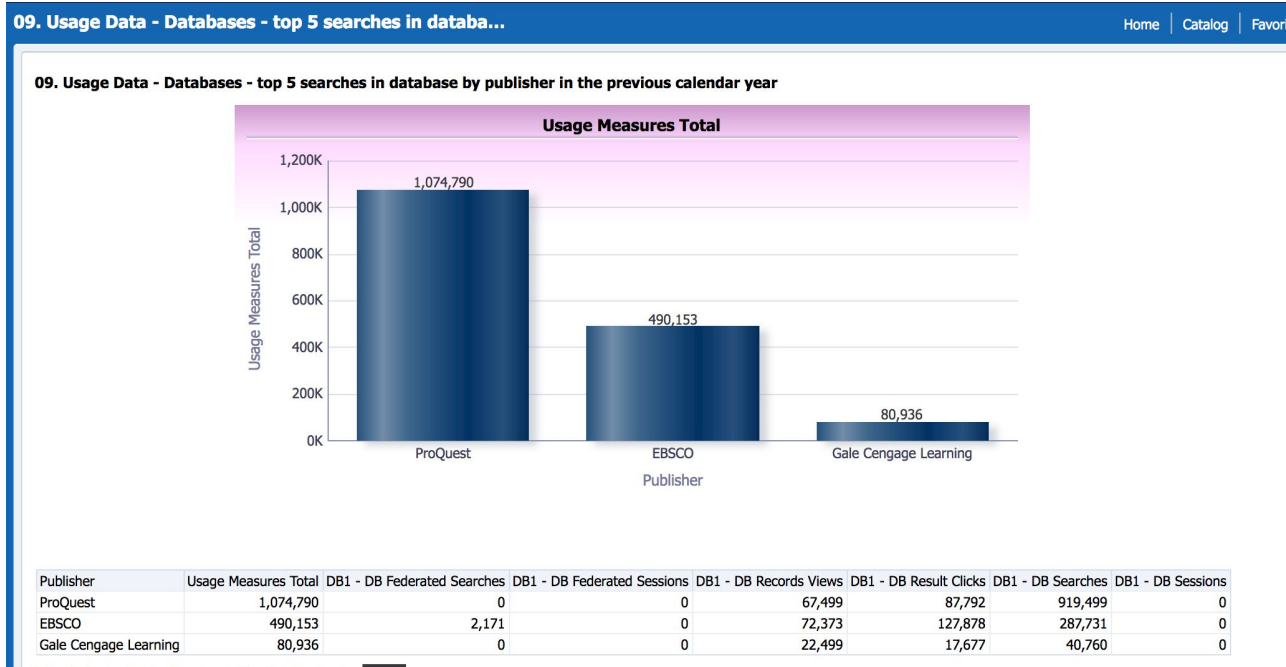
- Publishers with the least amount of journal usage in the previous year

## 08. Usage Data - Journals - least used publishers for article usage in the previous calendar year

Publisher	Usage Measures Total
"1 Decembrie 1918" University of Alba	4
"George Enescu" University of Arts	4
"Vasile Alecsandri" University of Bacau	8
"Vasile Goldis" University Press	10
1105 Media Inc.	2
1454119 Ontario Ltd. dba Teach Magazine	3
1854 Media	2
310 Publishing LLC	8
A Friend Indeed Publications Inc.	1
A I Root Company	4
A M Best Company	4
A.P. Publications Ltd.	1
A.S.C.R. PRESS	1
AACSB - International Association for Management Education	2
AAFCS / American Association of Family & Consumer Sciences	6
ABC-Clio	2
AC Business Media Inc.	6
ACA International	1
ACE Trust	7
ACM - SIGMIS	1
ACTA-Australia	1
ACUBE	3
AEDEI	6
AFAO Australia	1
AISTI (Iberian Association for Information Systems and Technologies)	2
AJIT-e: Online Academic Journal of Information Technology	3
ALM Media LLC	2
ALM Media Properties, LLC	10
AMDISA Secretariat	2

# Usage Data - Databases - top 5 searches in database by publisher in the previous calendar year

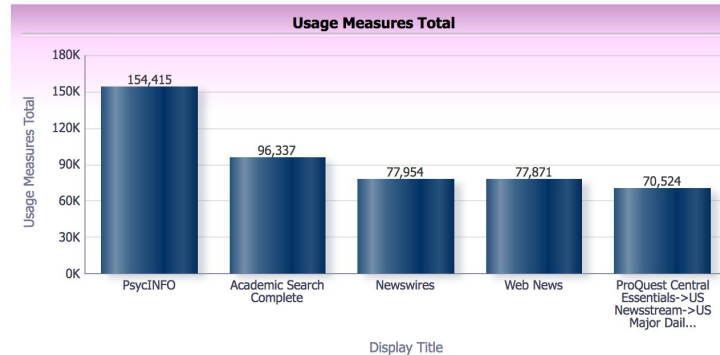
- Publisher or vendor with the greatest number of searches according to the DB1 (R4) COUNTER report in the previous year



# Usage Data - Databases - top 5 searches in databases by title in the previous calendar year

- Databases with the greatest number of searches according to the DB1 (R4) COUNTER report in the previous year

10. Usage Data - Databases - top 5 searches in database by title in the previous calendar year



Display Title	Usage Measures Total	DB1 - DB Federated Searches	DB1 - DB Federated Sessions	DB1 - DB Records Views	DB1 - DB Result Clicks	DB1 - DB Searches	DB1 - DB Sessions
PsycINFO	154,415	0	0	49,584	43,350	61,481	0
Academic Search Complete	96,337	92	0	23,775	43,288	29,182	0
Newswires	77,954	18	0	29	54	77,853	0
Web News	77,871	18	0	0	0	77,853	0
ProQuest Central Essentials->US Newsstream->US Major Dail...	70,524	0	0	119	688	69,717	0

# Usage Data - Databases - least used titles for search in database in the previous year

- Databases with the least amount of usage in the previous calendar year, according to the DB1 (R4) COUNTER report

## 12. Usage Data - Databases - least used titles for search in database in the previous calendar year

Title	Usage Measures Total	DB Searches	DB Federated Searches	DB1 - DB Records Views	DB1 - DB Result Clicks	DB1 - DB Searches	DB1 - DB Sessions
MasterFILE Reference eBook Collection	6	6	0	0	0	6	0
Topic Overviews K-5	4	4	0	0	0	4	0

# Usage Data - All publishers with Journal usage counter

- Total JR1 (R4) COUNTER data by publisher

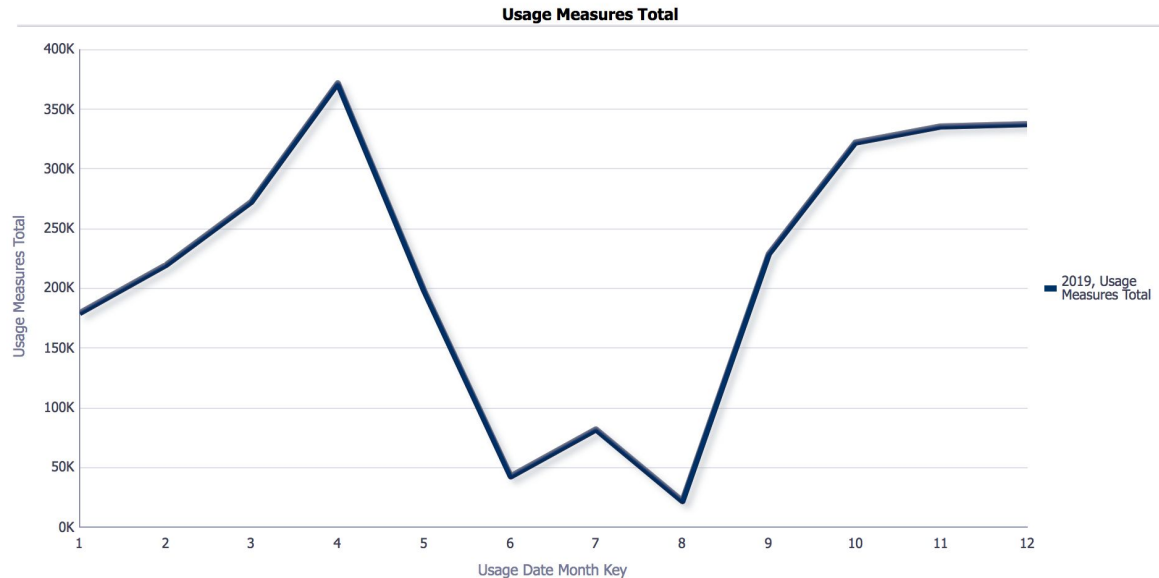
## 13. Usage Data - All Publishers with Journal Usage counter

Publisher	JR1 - Journal Usage Counter (total)
"1 Decembrie 1918" University of Alba	4
"Apollonia" University of Iasi	28
"Carol I" National Defence University	13
"George Enescu" University of Arts	4
"Vasile Alecsandri" University of Bacau	8
"Vasile Goldis" University Press	10
1105 Media Inc.	2
1105 Media, Inc.	17
1454119 Ontario Ltd. dba Teach Magazine	3
1854 Media	2
310 Publishing LLC	8
A & C Black Publishers Ltd	0
A Friend Indeed Publications Inc.	1
A I Root Company	4
A M Best Company	4
A&E Television Networks, LLC	11
A&V Publications	14
A.P. Publications Ltd.	1
A.S.C.R Press	24
A.S.C.R. PRESS	1
AACSB - International Association for Management Education	2
AAFCS / American Association of Family & Consumer Sciences	6
AUUC/UAAC (Association des universités d'art du Canada / Universities Art Association of Canada)	0
ABC-CLIO Interactive	52
ABC-Clio	2
AC Business Media Inc.	6
ACA International	1
ACE Trust	7
ACG Publications	25
ACM - SIGMIS	1
ACM / Association for Computing Machinery	31
ACTA-Australia	1

# Usage Data - trends by month for the previous two calendar years - all measures combined

- All usage metrics across COUNTER R4 reports combined and charted in a graph for the past two calendar years

14. Usage Data - Trends by month for the previous two calendar years - all measures combined



# Usage Data - Changes in the previous two calendar years - Increase in Usage

- Journal titles with an increase in usage
- Table organized by total journal COUNTER (R4) for the most recent previous year and the next most recent previous year

**15. Usage Data - Changes in previous two calendar years - Increase in Usage**

Title	Journal Usage Counter Two years ago	Journal Usage Counter One year ago	Journal Usage Counter Change (One year ago - Two years ago)
20th Century History Review		6	6
401 (k) Advisor		1	1
60 Minutes		4	4
A Fine FACTA		11	11
A Friend Indeed		1	1
AANA Journal		7	7
AAOS Now		1	1
AAP General News Wire		41	41
AASA journal of scholarship & practice		5	5
ABA Banking Journal		1	1
ABA Journal		25	25
ABA Journal of Labor & Employment Law		6	6
ABNF Journal		4	4
ABO		3	3
ACM Computing Surveys		4	4
ACME: An International E-Journal for Critical Geographies		1	1
AD-minister		1	1
ADB Economics Working Paper Series		1	1
ADWEEK		6	6
ADWEEK Online		1	1
AEIdeas [Blog]		2	2
AGRS On-line Papers in Economics and Informatics		2	2
AHA News		2	2
AI & Society		46	46
AI Communications: The European Journal on Artificial Int...		1	1
AI Magazine		3	3

## **Usage Data - Changes in the previous two calendar years - Decrease in Usage**

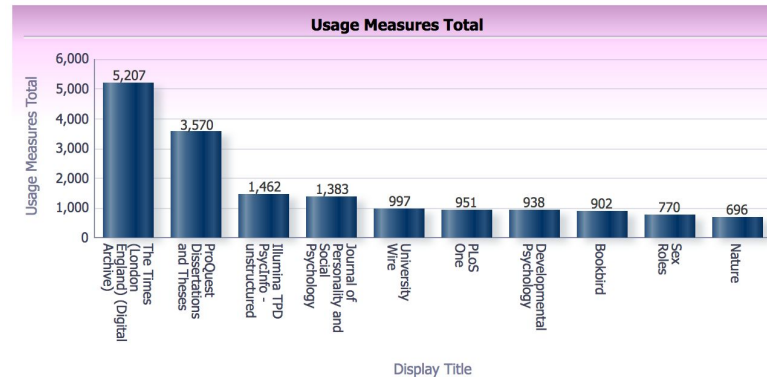
- Journal titles with an decrease in usage
- Table organized by total journal COUNTER (R4) for the most recent previous year and the next most recent previous year



# Usage Data - Journals - top 10 Journal titles in the previous calendar year

- Journal titles with the greatest usage in the previous year; all usage metrics combined

17. Usage Data - Journals - top 10 Journal titles in the previous calendar year

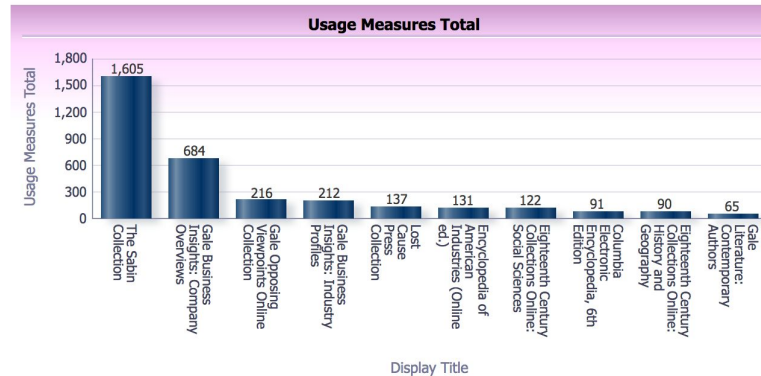


Usage Measures Total	Display Title
5,207	The Times (London England) (Digital Archive)
3,570	ProQuest Dissertations and Theses
1,462	Illumina TPD PsycInfo - unstructured
1,383	Journal of Personality and Social Psychology
997	University Wire
951	PLoS One
938	Developmental Psychology
902	Bookbird
770	Sex Roles
696	Nature

# Usage Data - eBooks - top 10 ebook titles in the previous calendar year

- eBook titles with the greatest usage in the previous year; all usage metrics combined

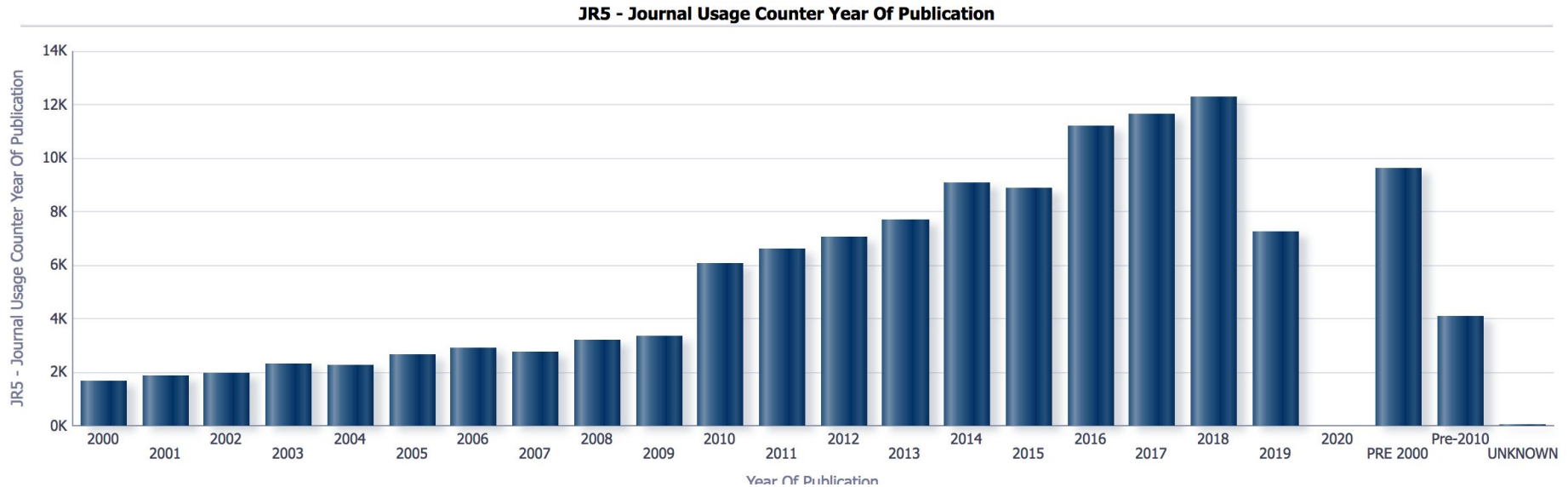
18. Usage Data - E-Books - top 10 E-Book titles in the previous calendar year



Usage Measures Total	Display Title
1,605	The Sabin Collection
684	Gale Business Insights: Company Overviews
216	Gale Opposing Viewpoints Online Collection
212	Gale Business Insights: Industry Profiles
137	Lost Cause Press Collection
131	Encyclopedia of American Industries (Online ed.)
122	Eighteenth Century Collections Online: Social Sciences
91	Columbia Electronic Encyclopedia, 6th Edition
90	Eighteenth Century Collections Online: History and Geography
65	Gale Literature: Contemporary Authors

# Usage Data - JR5 - Journal Usage Counter Year of Publication

- Sum of journal usage across COUNTER JR5 (R4) reports (and therefore across publishers)



# Usage Data - Usage amounts for all material types for three calendar years ago until current date

- COUNTER report type is prompt
- All usage metrics totals combined for selected reports across the past three years

## 20. Usage Data - Usage amounts for all material types for three calendar years ago until current date

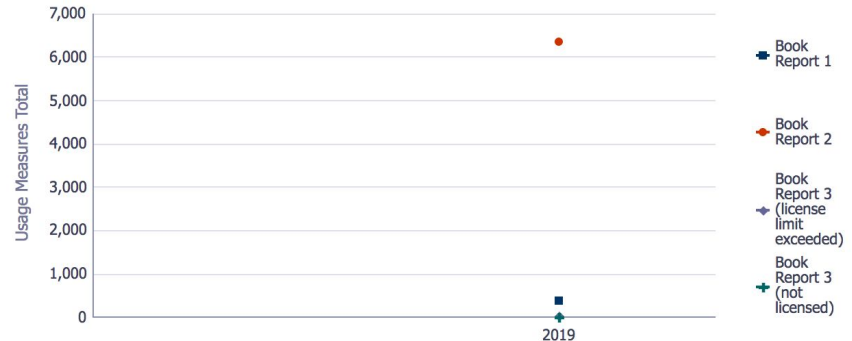
Material Type Indicator	2019 Usage Measures Total	Usage Measures Total
Book Report 1	372	372
Book Report 2	6,348	6,348
Book Report 3 (license limit exceeded)	21	21
Book Report 3 (not licensed)	0	0
<b>Grand Total</b>	<b>6,741</b>	<b>6,741</b>

Material Type Indicator

OK

Reset

Usage Measures Total



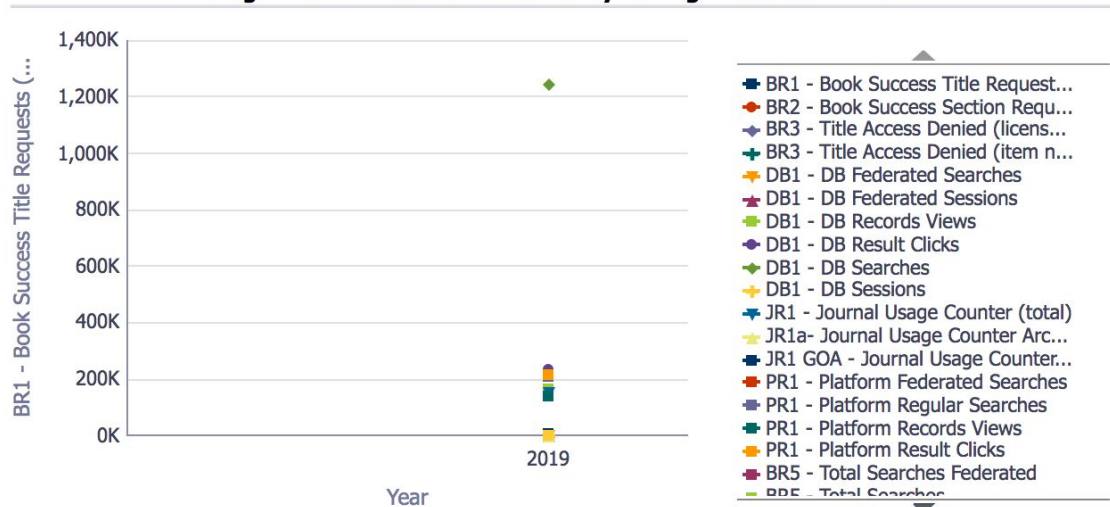
# Usage Data - Usage amounts for all measure types for three calendar years ago until current date

- Table and chart with all COUNTER (R4) data usage metrics displayed and summed for the past three years

21. Usage Data - Usage amounts for all measure types for three calendar years ago until current date

	2019	Grand Total
BR1 - Book Success Title Requests (total)	372	<b>372</b>
BR1 - Book Success Title Requests (html)	0	<b>0</b>
BR1 - Book Success Title Requests (pdf)	0	<b>0</b>
BR2 - Book Success Section Requests (total)	6,348	<b>6,348</b>
BR2 - Book Success Section Requests (html)	0	<b>0</b>
BR2 - Book Success Section Requests (pdf)	0	<b>0</b>
BR3 - Title Access Denied (license limit exceeded)	21	<b>21</b>
BR3 - Title Access Denied (item not licensed)	0	<b>0</b>
BR4 - Platform Access Denied (license limit exceeded)	0	<b>0</b>
BR4 - Platform Access Denied (item not licensed)	0	<b>0</b>
BR5 - Total Searches	0	<b>0</b>
BR5 - Total Searches Federated	0	<b>0</b>
DB1 - DB Federated Searches	2,171	<b>2,171</b>
DB1 - DB Federated Sessions	0	<b>0</b>
DB1 - DB Records Views	162,371	<b>162,371</b>
DB1 - DB Result Clicks	233,347	<b>233,347</b>
DB1 - DB Searches	1,247,990	<b>1,247,990</b>
DB1 - DB Sessions	0	<b>0</b>
JR1 - Journal Usage Counter (total)	154,541	<b>154,541</b>
JR1 - Journal Usage Counter (html)	0	<b>0</b>
JR1 - Journal Usage Counter (pdf)	0	<b>0</b>
JR1a- Journal Usage Counter Archive	0	<b>0</b>
JR1 GOA - Journal Usage Counter Gold Open Access (total)	5,470	<b>5,470</b>
JR1 GOA - Journal Usage Counter Gold Open Access (html)	0	<b>0</b>
JR1 GOA - Journal Usage Counter Gold Open Access (pdf)	0	<b>0</b>
MR1 - Multimedia Full Content Unit Requests	0	<b>0</b>
PR1 - Platform Federated Searches	0	<b>0</b>
PR1 - Platform Regular Searches	207,034	<b>207,034</b>
PR1 - Platform Records Views	139,872	<b>139,872</b>
PR1 - Platform Result Clicks	215,670	<b>215,670</b>

Usage amounts for three calendar years ago until current date



## Usage via COUNTER reports Dashboard - Release 5

Questions reports within this dashboard can answer:

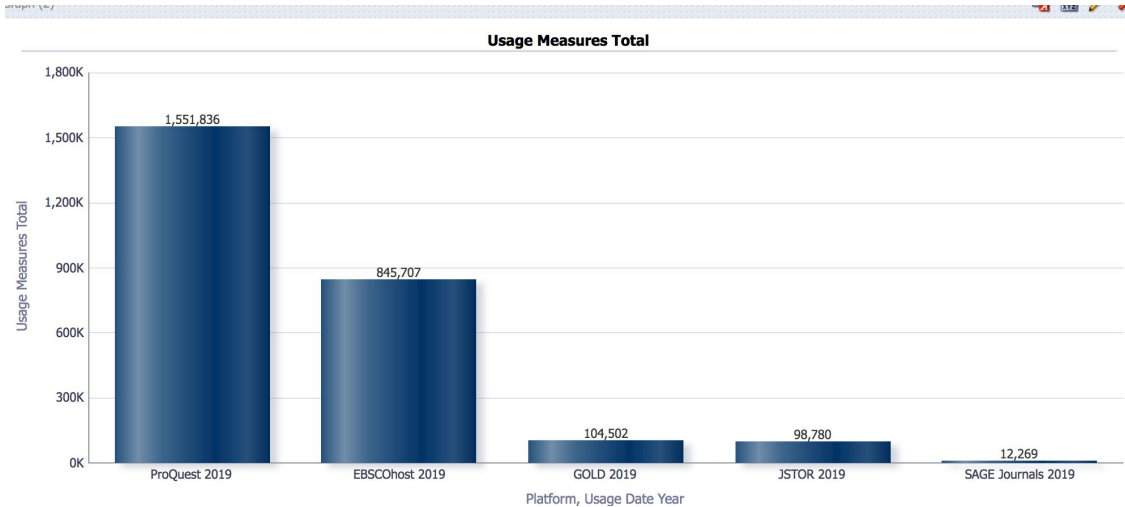
- Which platforms, publishers, and titles have been used the most in the previous year?
- What trends are occurring in usage in the past twelve months?

Data used:

- COUNTER R5 usage data

# Most used platforms

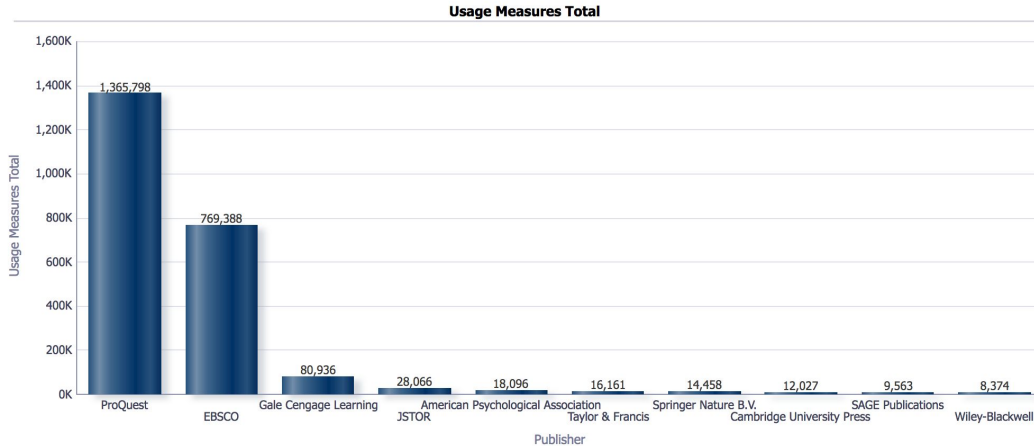
- Combined usage metric from all COUNTER R5 reports according to platforms with the highest overall usage



Platform	Usage Measures Total	Usage Date Year
ProQuest	1,551,836	2019
EBSCOhost	845,707	2019
GOLD	104,502	2019
JSTOR	98,780	2019
SAGE Journals	12,269	2019

# Most used publishers

- Combined usage metric from all COUNTER R5 reports according to publisher or vendor with the highest overall usage
- Edit the report criteria and filter as described in previous slide to select a date range

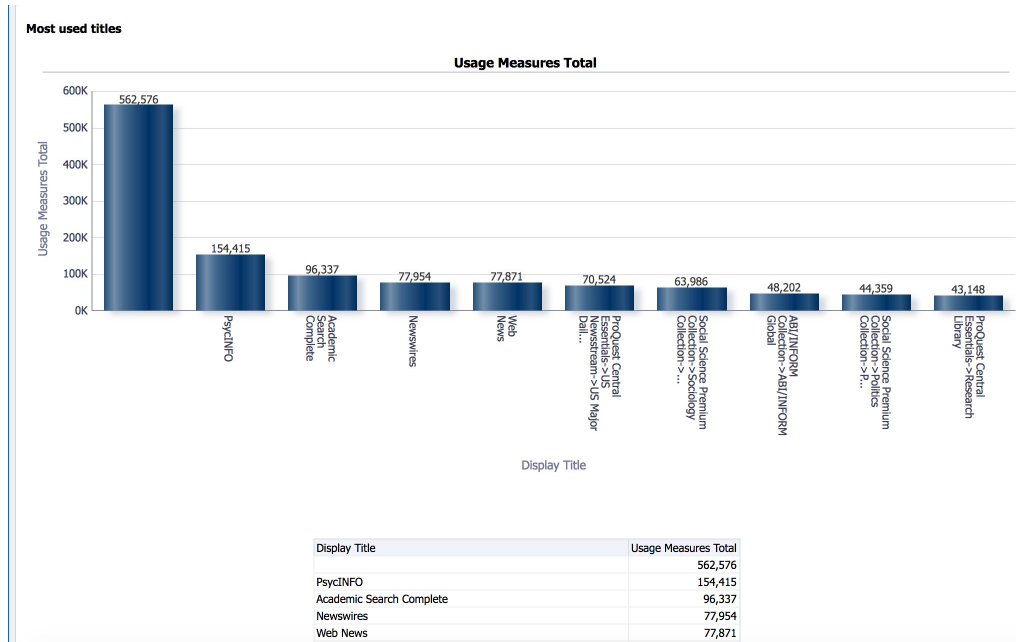


Publisher	Usage Measures Total
ProQuest	1,365,798
EBSCO	769,388
Gale Cengage Learning	80,936
JSTOR	28,066
American Psychological Association	18,096
Taylor & Francis	16,161
Springer Nature B.V.	14,458



# Most used titles

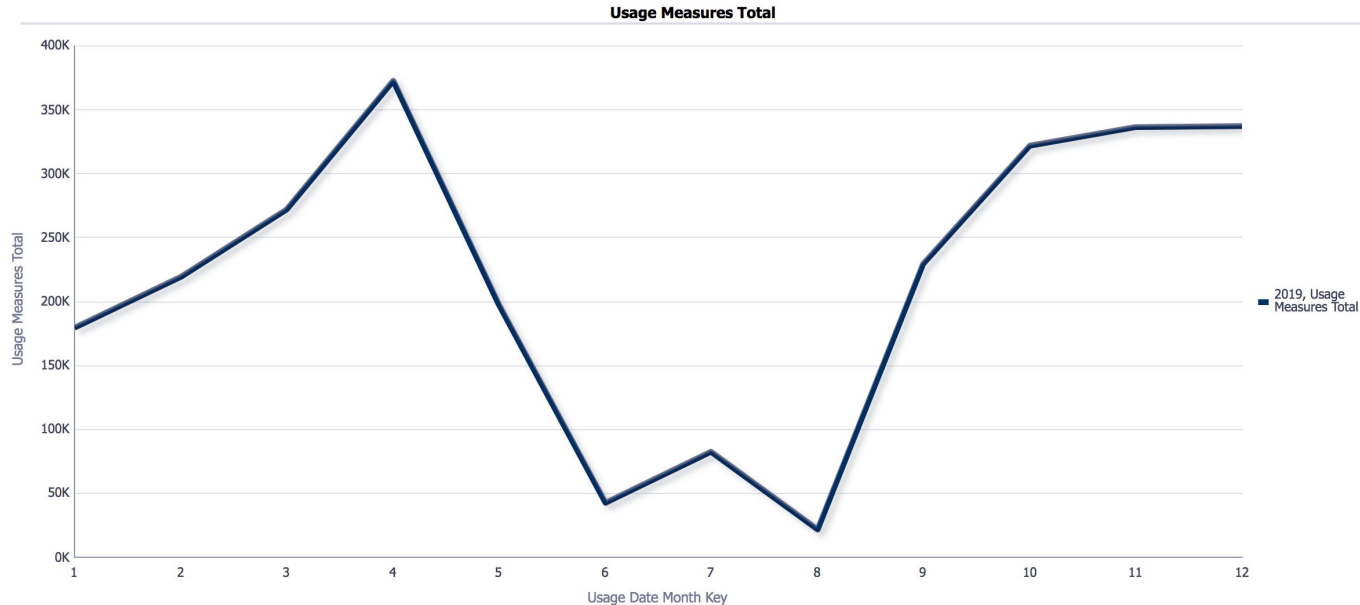
- Combined usage metric from all COUNTER R5 reports according to title with the highest overall usage
- Follow the steps on slide 63 to include a date range



# Trends by month

- All usage metrics across COUNTER R5 reports combined and charted in a graph
- Follow the steps on slide 63 to edit the date range

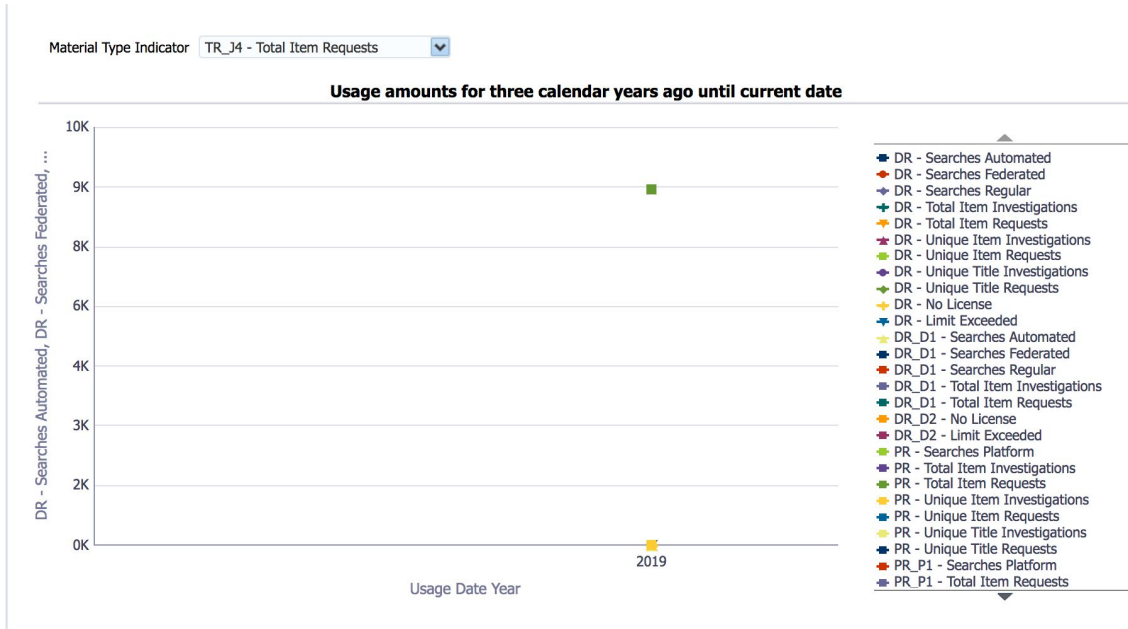
Trends by month



# Usage Data - Usage amounts for all measure types for three calendar years ago until current date

- Table and chart with all COUNTER (R5) data usage metrics displayed and summed
- If less than three years of data is available, the report will use whatever years of data are available

	2019	Grand Total
DR - Searches Automated	0	0
DR - Searches Federated	0	0
DR - Searches Regular	0	0
DR - Total Item Investigations	0	0
DR - Total Item Requests	0	0
DR - Unique Item Investigations	0	0
DR - Unique Item Requests	0	0
DR - Unique Title Investigations	0	0
DR - Unique Title Requests	0	0
DR - No License	0	0
DR - Limit Exceeded	0	0
DR_D1 - Searches Automated	0	0
DR_D1 - Searches Federated	0	0
DR_D1 - Searches Regular	7,777	7,777
DR_D1 - Total Item Investigations	10,666	10,666
DR_D1 - Total Item Requests	9,623	9,623
DR_D2 - No License	0	0
DR_D2 - Limit Exceeded	0	0
PR - Searches Platform	0	0
PR - Total Item Investigations	0	0
PR - Total Item Requests	0	0
PR - Unique Item Investigations	0	0
PR - Unique Item Requests	0	0
PR - Unique Title Investigations	0	0
PR - Unique Title Requests	0	0
PR_P1 - Searches Platform	0	0
PR_P1 - Total Item Requests	0	0
PR_P1 - Unique Item Requests	0	0
PR_P1 - Unique Title Requests	0	0
TR - Total Item Investigations	0	0
TR - Total Item Requests	0	0



# **Edit out of the box reports in Analytics**

*Some reports simply will not run successfully without a little extra attention...*

# Top Ten Journals by Requests

Out of the box, this report uses a date range of January 1, 2017 through December 31, 2017

**7a. Resolver Statistics by Source**

**No Results**

The specified criteria didn't result in any data. This is often caused by applying filters and/ applied are shown below.

**Filters**

Request Date is between **1/1/2017** and **12/31/2017** ←

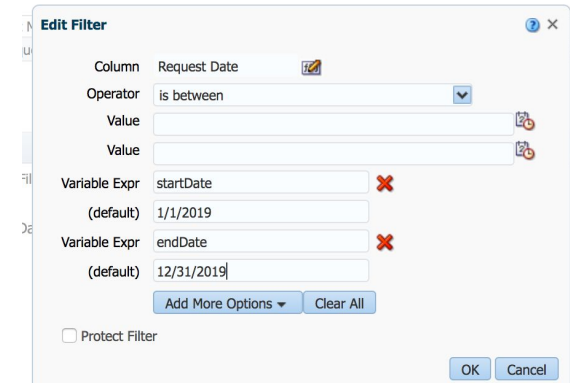
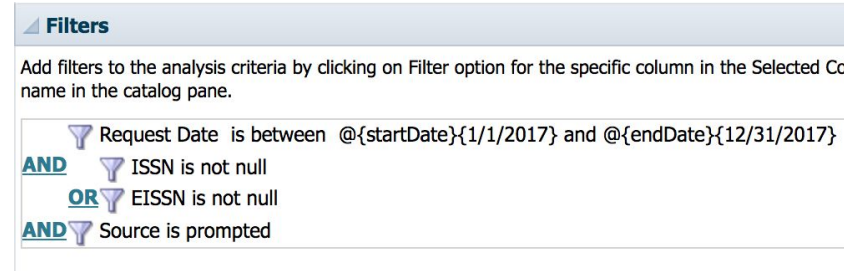
**and** ISSN is not null

**or** EISSN is not null

To select a different date range, click on Edit under the report name

Edit the date range filter (use the pencil icon).

Enter the desired date. Click OK.



# View the results of the report by clicking the Results tab

**7a. Resolver Statistics by Source** Home | Catalog | Favorites | Dashboards | New | Open | Signed In As NUTH

Criteria Results Prompts Advanced

**Subject Areas**

- Link Resolver Usage
  - OpenURL Context Measures
    - OpenURL Context Details
  - Request Date
  - Bibliographic Details
  - LC Classifications
  - Dewey Classifications
  - Other Classifications
  - Institution

**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 reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

OpenURL Context Details	OpenURL Context Measures
Source	Number of Requests
	Number of Clicked Requests
	Number of Requests Without Services
	% Requests Without Services from Requests

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

- Request Date is between @start and @end
- AND ISSN is not null
- OR EISSN is not null
- AND Source is prompted

Title



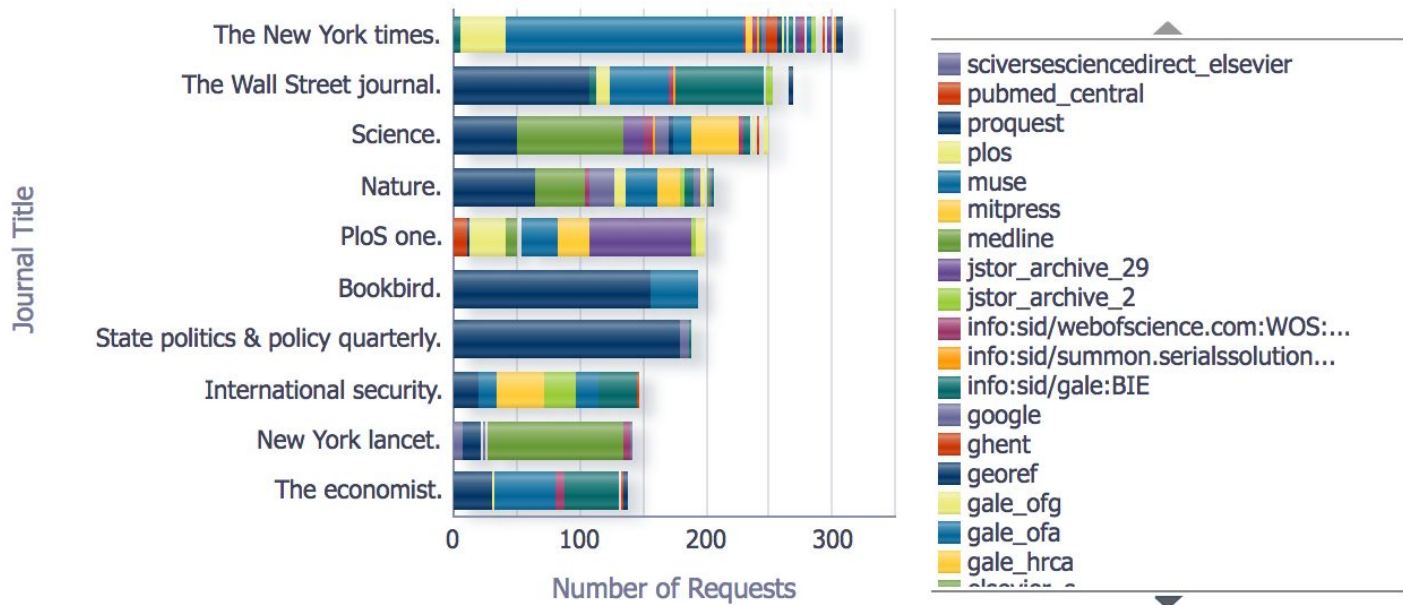
### Top Ten journals by requests

From @startDate to @endDate

Graph



### Number of Requests



Use the Edit feature to update the report subtitle



Enter the appropriate start and end dates and click Done

7a. Resolver Statistics by Source


Home | Catalog | Favorites | Dashboards | New | Open | Signed In As NUTH

Criteria **Results** Prompts Advanced


Editing from: "Compound Layout" **Done** Revert

Return to Compound Layout



Title


Title  

Display Saved Name

Logo   

Optional - URL of a title image.  
*Note: When running in a secured environment, only resources that are located on the Oracle BI Presentation Server may be used. These resources are referenced using a relative path prefixed with "fmap:".*

Subtitle   

Started Time  

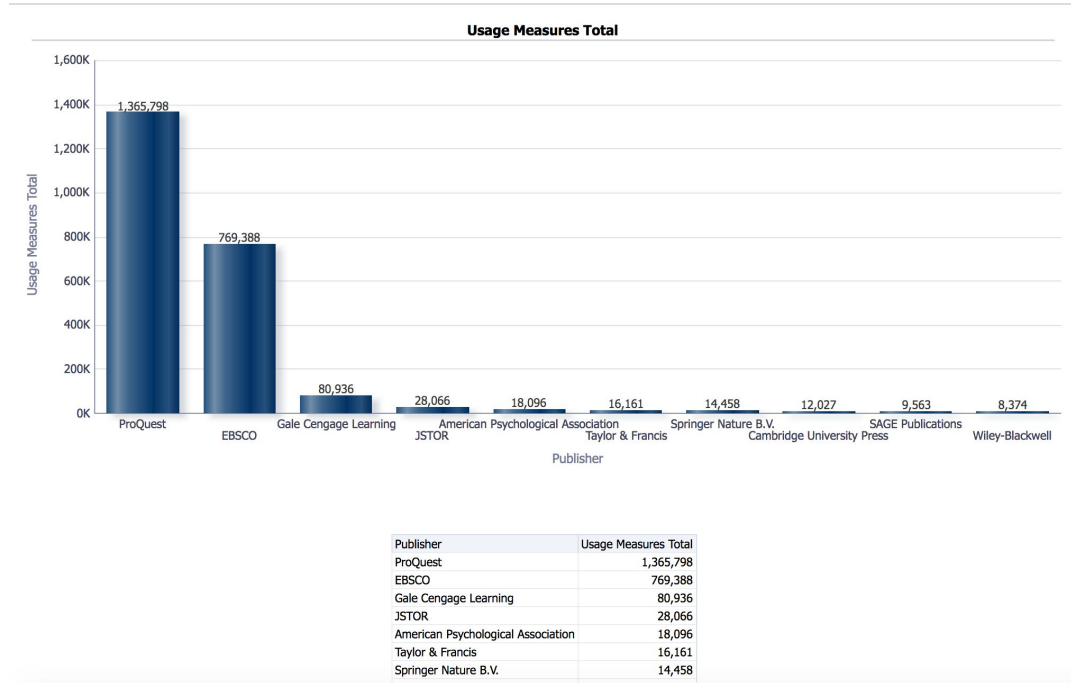
Help URL

Optional - URL for a document providing help on this analysis.  
*Note: When running in a secured environment, only resources that are located on the Oracle BI Presentation Server may be used. These resources are referenced using a relative path prefixed with "fmap:".*

**Link Resolver Analysis**  
From @{startDate} to @{endDate}



# Most used publishers

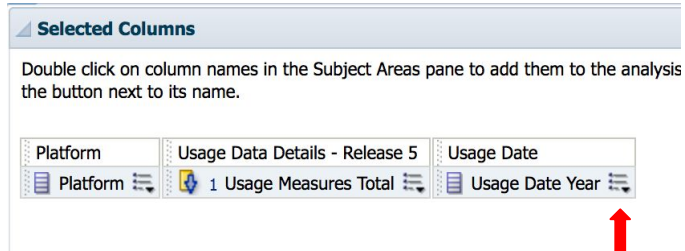


Add a date value  
to determine  
which year(s) this  
report applies to

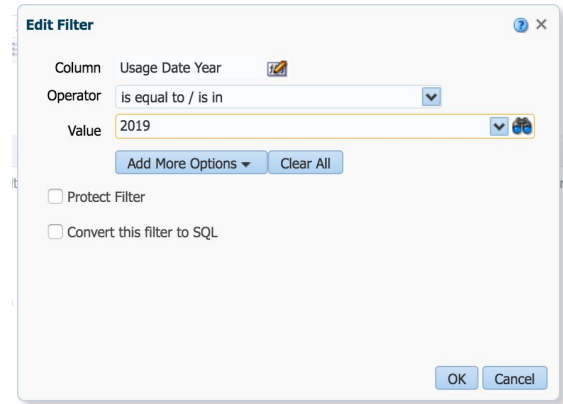




Select the Usage Date Year criteria

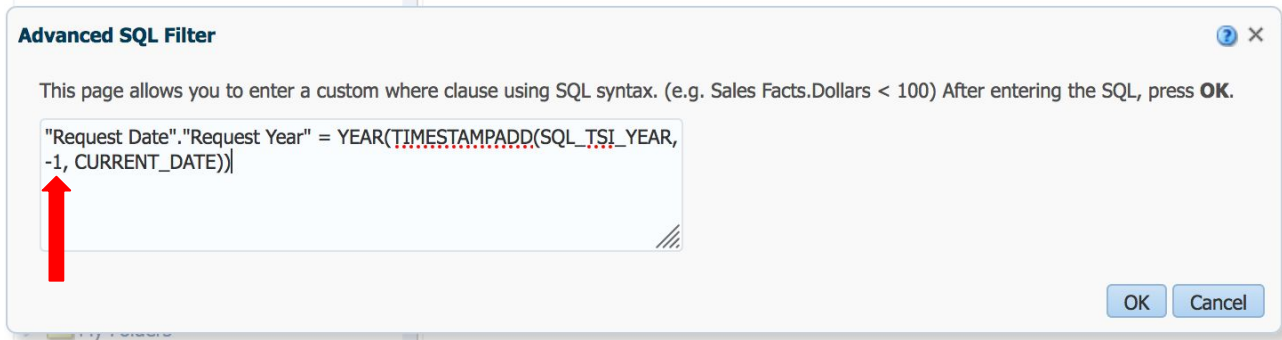


Click the filter icon to edit the Usage Date criteria



Enter the desired value and click OK

**Many of the reports in Analytics retrieve data from the previous year or previous three years. To change the date range, modify the SQL filter:**



The SQL filter for date appears as like this example. Data will be retrieved for the previous year.

Change the number that follows the minus sign to gather a different number of years worth of data

# **How to Create Custom Analytics Reports**

# Relevant Subject Areas and Criteria

**Criteria** Results Prompts Advanced

**Subject Areas**

- E-Inventory
  - Portfolio
  - Portfolio Activation Date
  - Portfolio Creation Date
  - Portfolio Modification Date
  - Portfolio Library Unit
  - Portfolio License
  - Portfolio PO Line
  - Portfolio URL Information
  - Portfolio Details for Consortia
  - Electronic Collection
  - Electronic Collection Creation Date
  - Electronic Collection Library Unit
  - Electronic Collection License
  - Electronic Collection Material Type
  - Electronic Collection PO Line
  - Electronic Collection Type
  - Electronic Collection URL Information
  - Service
  - Service Details
  - Service Type
  - Service URL Information
  - Bibliographic Details
  - Dewey Classifications
  - LC Classifications
  - Other Classifications
  - Vendor Interface
  - Cost Usage
  - Institution

**Criteria** Results Prompts Advanced

**Subject Areas**

- Licenses
  - License Measures
  - License Header
  - License Terms
  - License Vendor
  - License Agent
  - License Library Unit
  - License Creation Date
  - License Modification Date
  - License Negotiation (Network Ins
  - Institution

**Criteria** Results Prompts Advanced

**Subject Areas**

- Link Resolver Usage
  - OpenURL Context Measures
  - OpenURL Context Details
  - Request Date
  - Bibliographic Details
  - LC Classifications
  - Dewey Classifications
  - Other Classifications
  - Institution

**Criteria** Results Prompts Advanced

**Subject Areas**

- Usage Data
  - Usage Data Details - Release 5
  - Usage Data Details
  - Usage Data Details - JR5
  - Usage Date
  - Title Identifier
  - Platform
  - Publisher
  - Subscriber
  - Load File
  - Uploading Vendor
  - Institution

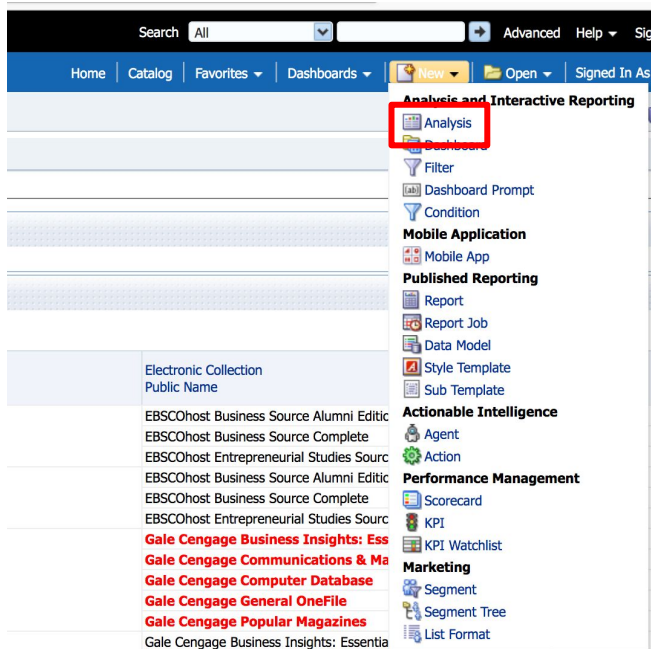
**Criteria** Results Prompts Advanced

**Subject Areas**

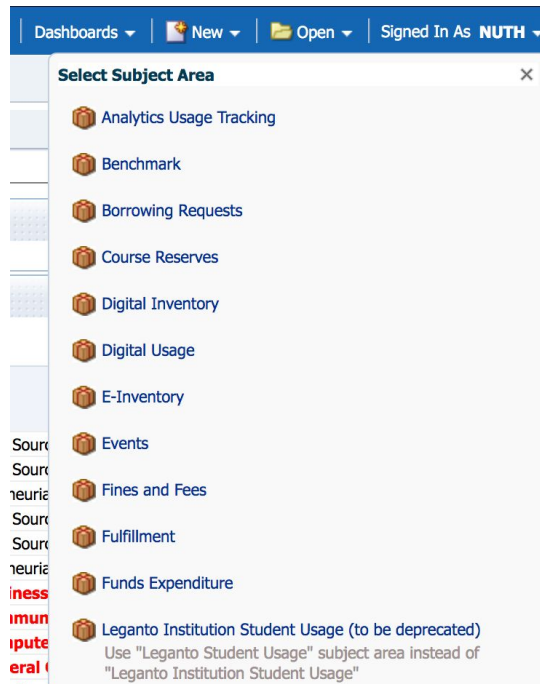
- Funds Expenditure
  - Fund Transactions
  - Fund Transaction Details
  - Transaction Date
  - Fiscal Period
  - Library Unit
  - Reporting Code
  - Fund Ledger
  - Vendor
  - PO Line
  - PO Line Type
  - PO Line License
  - Invoice Line
  - Bibliographic Details
  - LC Classifications
  - Dewey Classifications
  - Other Classifications
  - Periods Outer
  - Institution

# Create a new report

Click on the New menu and select Analysis



Select a Subject Area from which to select criteria





Double click or drag and drop criteria into the Selected Columns pane

The screenshot shows a software interface with a 'Criteria' tab selected. The main area is divided into two panes. The left pane, titled 'Subject Areas', contains a list of criteria. The right pane, titled 'Selected Columns', contains a list of selected criteria. The 'Electronic Collection Public Name' criterion is highlighted in both panes.

**Criteria** Results Prompts Advanced

**Subject Areas**

- No. of Electronic Collections (In Repository)
- No. of Electronic Collections (In Repository)
- Electronic Collection Expected Activation Date
- Electronic Collection Access Type
- Electronic Collection Activation Date
- Electronic Collection Authentication Note
- Electronic Collection COUNTER Platform
- Electronic Collection Creation Date
- Electronic Collection Creator
- Electronic Collection Id
- Electronic Collection Internal Description
- Electronic Collection Lifecycle
- Electronic Collection Link Id
- Electronic Collection Linked To CZ
- Electronic Collection Modification Date
- Electronic Collection Modified By
- Electronic Collection Public Name**
- Electronic Collection Public Name Override
- Electronic Collection Public Note
- Electronic Collection Additional PO Lines

**Selected Columns**

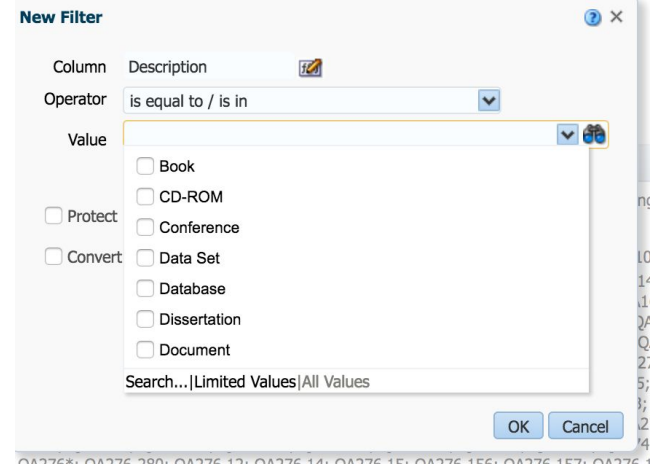
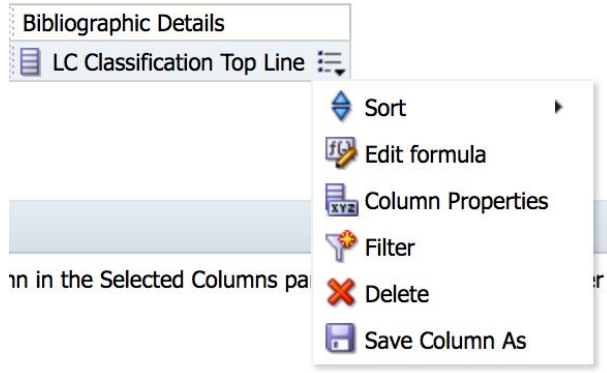
Double click on column names in the Subject hovering over the button next to its name.

- Electronic Collection
- Electronic Collection Public Name

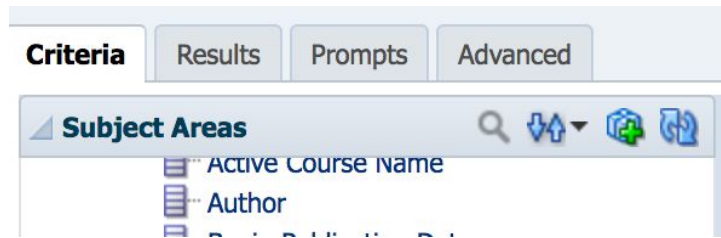
**Filters**

Add filters to the analysis criteria by clicking or selecting its name in the catalog pane.

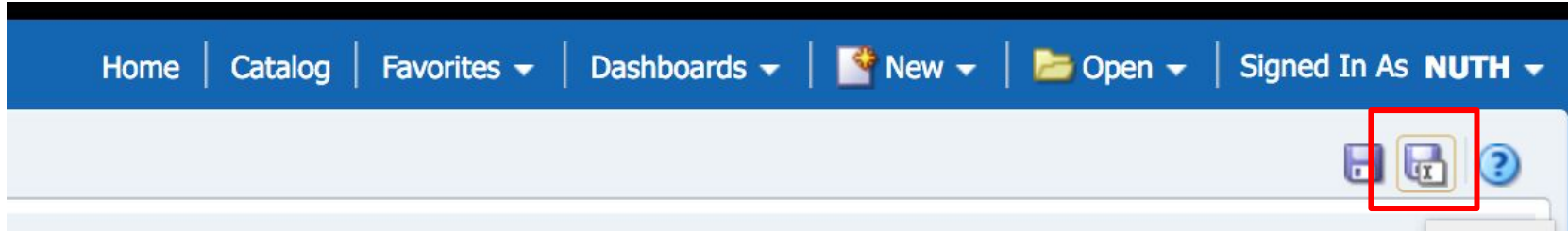
Use the filters to refine the retrieved data



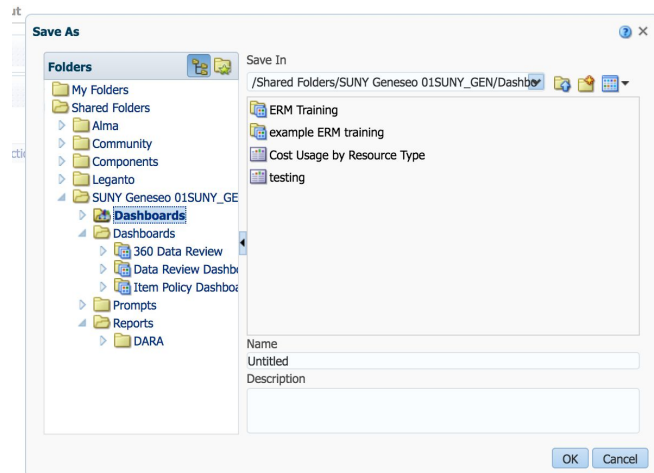
Click the Results tab to generate the report



When the report is finished, be sure to Save As

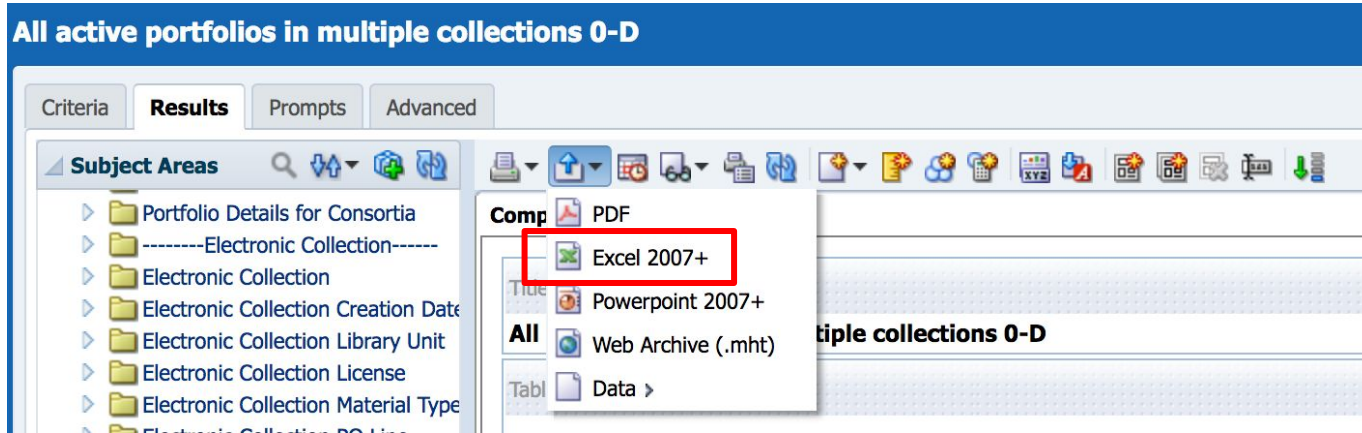


Be sure to save the report in your institution's folder, in an existing dashboard or folder, or create a new one



# **Electronic Collection Overlap**

After running a All Active Portfolios in Multiple Collections report, export the report as an Excel file



Use the Excel file to sort and identify two or more electronic collections with a high amount of overlap to compare further

Navigate to Alma and open the Overlap and Collection Analysis Tool and click the Submit a New Report button

The screenshot shows the Alma navigation menu with the following items:

- Resources
- Discovery
- Fulfillment
- Admin
- Analytics

Under the Resources tab, the following items are listed:

- Cataloging
- Open Metadata Editor
- Search Resources
- Browse Bibliographic Headings
- Browse Shelf Listing
- Authority Control Task List
- Reminders
- Create Inventory
- Add Local Electronic Collection
- Add Local Portfolio
- Add Physical Item
- Add Digital Representation
- Manage Inventory
- Manage Collections
- Community Zone Updates Task List
- Manage Electronic Resource Activation
- Network Harvesting Report List
- My Electronic Resources by Provider
- Shelf Report

Under the Admin tab, the following items are listed:

- Import
- Import
- Upload Single Record From File
- Monitor and View Imports
- Resolve Import Issues
- Manage Import Profiles
- Advanced Tools
- Overlap and Collection Analysis
- Duplicate Title Analysis
- Manage Deleted Repository
- Restore Jobs
- Digital Uploader
- PC to CDI Activation Report
- Publishing
- Publishing Profiles
- Publishing Information

The 'Overlap and Collection Analysis' item is highlighted with a red box.

### Overlap and Collection Analysis

The screenshot shows the 'Overlap and Collection Analysis' tool interface. The 'Report History' section displays '1 - 1 of 1' reports. A search bar is present with the placeholder text 'Report name'. The 'Submit New Report' button is highlighted with a red box. Other buttons visible are 'Refresh', a share icon, and a settings icon.

## Select Set Comparison as the Report Type and click Next

Overlap and Collection Analysis 1 ? Cancel Next

Choose Report Type

Set Comparison

Selected Titles

**Compare Electronic Collections** - This option allows the comparison of a source electronic collection with one or more target electronic collections. Each title in the source collection is compared with a de-duplication group of titles in the set of target collections. A report describing the overlap status of each title in the first set is given.

## Click the Source Electronic Collection button to select a collection to compare

Compare Electronic Collections 1 2 3 Cancel Back Next

Source Electronic Collection

Source Electronic Collection

No records were found.

Target Electronic Collections

Compare with collections of  Institution Zone  Community Zone

Target Electronic Collections

No records were found.

Search for the desired electronic collection, select the collection, and click Add Selected, and Done when complete

Repository Search

Electronic collection Keywords business insights

Facets

Select All Sort by: Rank

1  **Gale Cengage Business Insights: Essentials** Portfolio List (10567) Edit Collection ...

Type: Aggregator package In CDI: Yes  
Services: Full Text (Available) Active for Search in CDI: No  
Interface name: Galegroup CDI Search Rights: Free  
Linking Level: Article CDI Full Text Rights: Subscription (Linkresolver)  
Creation Date: 06/10/2019 08:11:42 EDT CDI Full Text Linking: Linkresolver  
Modification Date: 12/04/2019 24:20:37 EST  
Collection ID: 6137971670004833

Other details

2  **SUNY ScienceDirect (Elsevier ScienceDirect Journals Complete)** Portfolio List (3076) Edit Collection ...

Type: Selective package  
Services: Full Text (Available)



Add Selected Back Done




Select the target collection to compare with the source collection. Select the IZ or CZ, and click the Target Electronic Collections button

< Compare Electronic Collections 1 2 3 Cancel Back Next

Source Electronic Collection


Source Electronic Collection  

▲ Electronic Collection Name	▲ Scope	
1 Gale Cengage Business Insights: Essentials	Institution Zone	

Target Electronic Collections

Compare with collections of  Institution Zone  Community Zone

Target Electronic Collections

  
No records were found.

# Select and add desired electronic collections to compare

## Repository Search ✕

**Electronic collection** Keywords **general onefile** ✕ ↑ 🔍 Advanced

Select All   Sort by: **Rank** 📄 ⚙️

**Facets** ⏪

**Type** ⌵  
Aggregator package (1)

**Interface** ⌵  
Galegroup (1)

**Electronic Collection Type** ⌵  
Journal Package (1)

1  👤 **Gale Cengage General OneFile** Portfolio List (9082) Edit Collection ⋮

**Type:** Aggregator package  
**Services:** Full Text (Available)  
**Interface name:** Galegroup  
**Linking Level:** Article  
**Creation Date:** 06/10/2019 08:11:49 EDT  
**Modification Date:** 12/04/2019 24:20:37 EST

**Collection ID:**  
6137970950004833

**In CDI:** Yes  
**Active for Search in CDI:** No  
**CDI Search Rights:** Free  
**CDI Full Text Rights:** Subscription (Linkresolver)  
**CDI Full Text Linking:** Linkresolver

[Other details](#)

Add Selected Back Done

When all collections have been selected and added, click Next

## < Compare Electronic Collections



Cancel

Back

Next

### Source Electronic Collection

Source Electronic Collection



▲ Electronic Collection Name

▲ Scope

1 Gale Cengage Business Insights: Essentials

Institution Zone



### Target Electronic Collections

Compare with collections of  Institution Zone  Community Zone

Target Electronic Collections



▲ Electronic Collection Name

▲ Scope

1 Gale Cengage General OneFile

Institution Zone



Check the box to Use Date Coverage Information in the Comparison and click Submit (clicking the box will include partial coverage overlap in the report)

< Compare Electronic Collections



Cancel

Back

Submit

Report Name \*

Report Description

Match Method

Use date coverage information in the comparison

Reference year for calculating "embargo":

Use the ellipses to select View when the report is finished

## < Overlap and Collection Analysis

Back

### Report History

1 - 2 of 2

Report name



Submit New Report

Refresh



Filter : All

	Report Name	Report Type	Status	Creator	Time Started	Time Ended	
1	Overlap Analysis- Wed Jan 29 10:48:22 UTC 2020	Set Comparison	Completed Successfully	NUTH	2020-01-29 05:56:29	2020-01-29 05:57:58	...
2	Overlap Analysis- Wed Jan 29 10:37:41 UTC 2020	Set Comparison	Completed Successfully	NUTH	2020-01-29 05:40:14	2020-01-29 05:41:41	View

Click on a report title to download an Excel file of the report

< Job Report

Back



Overlap and collection analysis job - Overlap Analysis- Wed Jan 29 10:48:22 UTC 2020



**Completed  
Successfully**

**Process ID** 942113700004833  
**Finished on** 01/29/2020 05:57:58 EST  
**Status** Completed Successfully  
**Records processed** 10567

**Started on** 01/29/2020 05:56:29 EST  
**Total run time** 1 Minutes 29 Seconds  
**Status date** 01/29/2020 05:57:58 EST  
**Records with exceptions** 0

Counters



Link to report: [Set Comparison - Complete Overlap report \(2755\)](#)

Link to report: [Set Comparison - Partial Overlap report \(168\)](#)

Link to report: [Set Comparison - Title Overlap report \(12\)](#)

Link to report: [Set Comparison - Unique Titles report \(7543\)](#)

# Measuring Overlap Between Formats

## **In the Titles shared Alma folder, Alma Analytics offers the following reports to gather data regarding overlap across formats:**

Overlap E and D: Titles with inventory in both electronic and digital format

Overlap P and D: Titles with inventory in both physical and digital format

Overlap P and E: Titles with inventory in both physical and electronic format

Overlap P and E and D: Titles with inventory in both physical and electronic and digital format

Overlap P and P: Titles with two different bibliographic records for the same titles and both bibliographic records have inventory in physical format

Overlap E and E: Titles with two different bibliographic records for the same titles and both bibliographic records have inventory in electronic format



# Analytics → Catalog → Shared Folders → Alma

The screenshot displays the Alma interface. On the left, the 'Folders' pane shows a tree structure of folders. The 'Titles' folder is expanded, and the 'Reports' sub-folder is highlighted with a red box. Below the folders, the 'Tasks' pane shows various actions like 'Expand', 'RSS', 'Delete', 'Copy', 'Rename', 'Create Shortcut', 'Properties', and 'Permissions'. The main pane on the right shows a list of reports, sorted by name (A-Z). The reports listed are:

- Bibliographic records with holdings record and no items** | Last Modified
- Bibliographic records with no inventory of any type** | Last Modified 2/1
- Deleted Records Report** | Last Modified 9/7/2019 11:17:10 PM | Owner
- Inventory Breakdown** | Last Modified 2/12/2018 8:14:16 AM | Owner
- Overlap E and D** | Last Modified 9/4/2019 2:27:17 PM | Owner
- Overlap E and E** | Last Modified 9/15/2019 6:07:01 AM | Owner
- Overlap P and D** | Last Modified 6/6/2019 6:53:52 AM | Owner
- Overlap P and E** | Last Modified 6/6/2019 7:01:52 AM | Owner
- Overlap P and E and D** | Last Modified 6/6/2019 7:06:22 AM | Owner
- Overlap P and P** | Last Modified 8/4/2019 6:16:07 AM | Owner

## How overlap is measured:


Title Author Combined and Normalized:


- A combination of the normalized title plus the first four characters of the author. This is the default. It is called “Title Author Combined and Normalized”

Each of these reports includes prompts, such as material type, LC classification code, and/or last loan or in-house browse date. It is not necessary to input a title in the Title field.


**Overlap P and E**


Title


Last Loan Date (In House) <=  


Last Loan Date (Not In House) <=  

Subject


Dewey Number  

LC Classification Code  

Material Type  

\* Find overlap by  

Number of loans (in last 365 days) <=



## Overlap P and E

Title Author Combined and Normalized	Title	Author	MMS Id	Electronic Inventory	Physical Inventory	Num Loans Last 365 days
action and responsibility - sned	Action and responsibility	Sneddon, Andrew.	990004431850204833	1	1	0
active life miller s metaphysics of democracy - mcga	The active life : Miller's metaphysics of democracy /	McGandy, Michael J.	990004120480204833	1	1	0
advancement of learning book 1 - baco	The advancement of learning,	Bacon, Francis, 1561-1626.	990003658690204833	1	1	0
advancement of learning book 2 - baco	The advancement of learning,	Bacon, Francis, 1561-1626.	990003658700204833	1	1	0
advancing phenomenology essays in honor of lester embree -	Advancing phenomenology essays in honor of Lester Embree /		990004633450204833	1	1	0
age of german idealism -	The age of German idealism		990003999800204833	1	1	0
alexandria and her schools - king	Alexandria and her schools	Kingsley, Charles, 1819-1875.	990003640010204833	1	1	0
anselm basic writings - anse	Anselm, basic writings	Anselm, Saint, Archbishop of Canterbury, 1033-1109.	990003651870204833	1	1	0
apprehension and argument ancient theories of starting points for knowledge - tuom	Apprehension and argument ancient theories of starting points for knowledge /	Tuominen, Miira.	990004428340204833	1	1	0
aquinas and maimonides on the possibility of the knowledge of god an examination of the quaestio de - rubi	Aquinas and Maimonides on the possibility of the knowledge of God an examination of the quaestio de attributis /	Rubio, Mercedes.	990004435380204833	1	1	0
aristotle - hoff	Aristotle	Hoffe, Otfried.	990003996750204833	1	1	0
aristotle on false reasoning language and the world in the sophistical refutations - schr	Aristotle on false reasoning language and the world in the Sophistical refutations /	Schreiber, Scott G. 1952- (Scott Gregory),	990003996710204833	1	1	0
aristotle on interpretation - thom	Aristotle on interpretation /	Thomas, Aquinas, Saint, 1225?-1274.	990003394120204833	1	1	0

# Relevant Documentation

Alma Analytics Training Guide

<https://slcny.libguides.com/training-analytics>

The Basics of Working with Analytics

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/010Introduction/The\\_Basics\\_of\\_Working\\_with\\_Analytics](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics)

Alma Analytics - Matching the resource from COUNTER report to the resource in Alma for cost per use

<https://developers.exlibrisgroup.com/blog/alma-analytics-matching-the-resource-from-counter-report-to-the-resource-in-alma-for-cost-per-use/>

Alma Analytics - Overview of determining the price for cost per use

<https://developers.exlibrisgroup.com/blog/alma-analytics-overview-of-determining-the-price-for-cost-per-use/>

Presentations and Documents - Analytics - Usage and Cost per Use

[https://knowledge.exlibrisgroup.com/Alma/Training/Extended\\_Training/Presentations\\_and\\_Documents\\_-\\_Analytics\\_-\\_Usage\\_and\\_Cost\\_Per\\_Use](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Analytics_-_Usage_and_Cost_Per_Use)

Link Resolver Usage

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/Alma\\_Analytics\\_Subject\\_Areas/Link\\_Resolver\\_Usage#OpenURL\\_Context\\_Measures](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Link_Resolver_Usage#OpenURL_Context_Measures)

Analytics - Titles subject area and overlap analysis

[https://knowledge.exlibrisgroup.com/Alma/Training/Extended\\_Training/Presentations\\_and\\_Documents\\_-\\_Analytics](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Analytics)

COUNTER and SUSHI Set Up (Slides and Recording from 2019 ERM Training)

<https://slcny.libguides.com/c.php?g=935071&p=6749556>