

# Resource Sharing Analytics

Timothy Jackson  
SUNY Library Shared Services (SLSS)

# Agenda

- Alma configuration/behavior that impacts Analytics
  - ILLiad integration
  - RS Request Completed Request Cleanup Job
  - Locate process
- Analytics Basics
- Borrowing Analysis examples
- Lending Analysis examples
- Creating Dashboards, Reports, and Widgets
- Other Analytics training resources

# ILLiad Integration

- ILLiad NCIP addons create both borrowing and lending requests in Alma
- Requests are assigned to ILLiad resource sharing partner
- External Identifiers are ILLiad Transaction Numbers
- These requests will appear in Analytics reports unless you filter by Partner and/or External Identifier

# RS Completed Request Cleanup Job

- Designed to keep borrowing and lending request lists clean
- This job is running at all campuses
- Requests in following statuses are moved to “Deleted” status
  - Borrowing: Cancelled by patron, Cancelled by partner, Cancelled by staff, Expired, Rejected by partner, Request completed
  - Lending: Rejected the borrower request, Request Completed
- Must use field other than Request Status when creating Analytics reports for cleaned up requests

# RS Completed Request Cleanup Job

- Can be configured by going to **Configuration | Fulfillment | General | Fulfillment Jobs Configuration**
- Can adjust which statuses are cleaned up and how long a request must be completed before it is cleaned up

Resource Sharing Completed Request Cleanup

Status ☒ Active ☐ Inactive

Request Type 

Both

Days since request completion \* 

1

Completed requests statuses

Borrowing : 

All

Lending : 

All

Schedule 

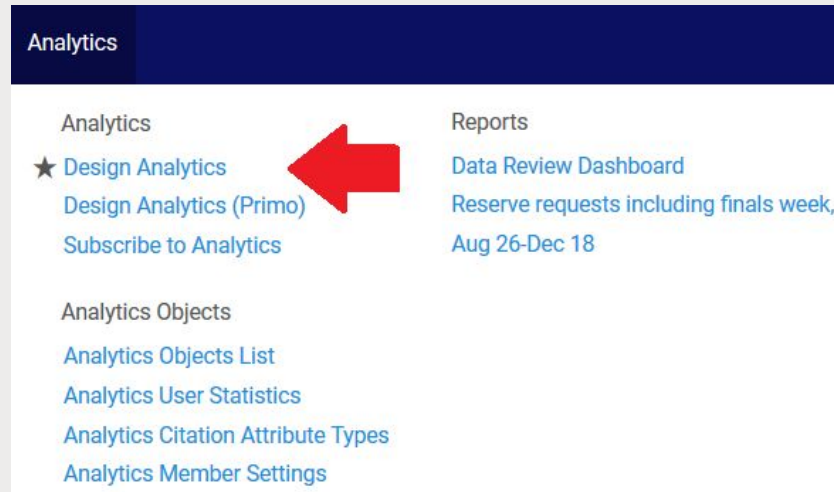
Every Monday at 01:00

# Locate Process

- When a RS request is submitted, Alma attempts to locate the item at each SUNY campus
- When a requested item is located at a campus, that campus is added to the rota, and a separate borrowing request is created with same External ID but different Partner and Active Partner Status
- All of these requests appear in Analytics, so you will need to filter out inactive requests

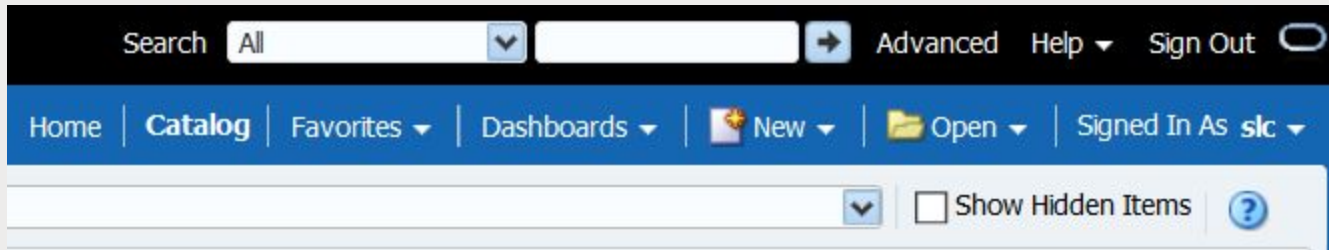
# Analytics Basics

- Role needed: **Designs Analytics**
- Logging in to Analytics: Go to **Analytics | Design Analytics**



# Analytics Basics

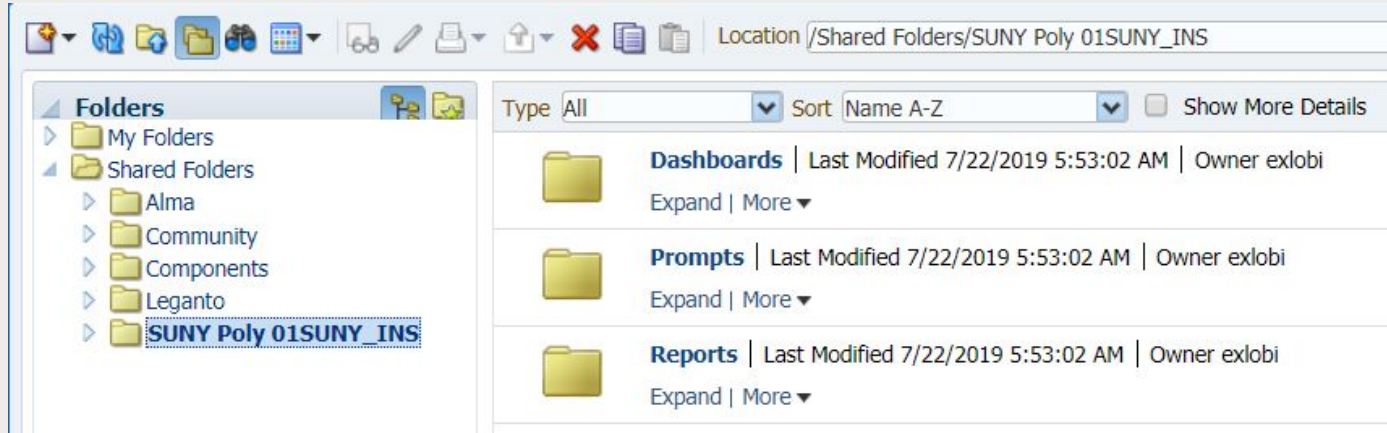
- To access previously created reports: click **Catalog**
- To create new reports: click **New**





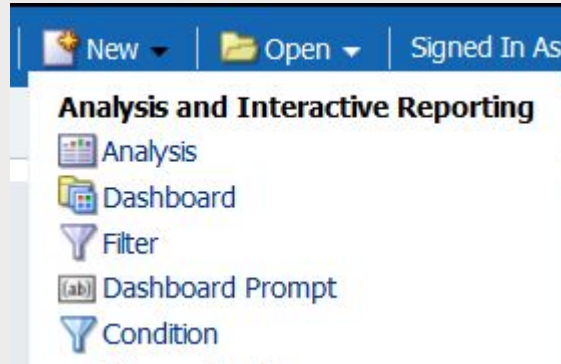
# Analytics Basics

- The Catalog option allows you to access your personal folder, your institution's shared folder, and shared folders for the entire Alma community
- Shared Folders/Community/Reports/Consortia/SUNY



# Analytics Basics

- The New option allows you to create a new Analysis
- Analyses specific to subject areas
  - Borrowing Requests
  - Lending Requests



# Borrowing Analysis

- Subject Area: Borrowing Requests
- Categories of information:
  - Borrowing Request Details
  - Borrowing Creation Date
  - Due Date
  - Partner
  - Requester
  - Library Unit
  - Bibliographic Details
  - Assigned To
  - Institution

# Borrowing Analysis Example #1

- **Who am I borrowing from?**
- **Borrowing Request Details:**
  - Num of Requests
  - Partner Active Status (= *Active*)
  - Borrowing Request Status
- **Partner:**
  - Partner Name (*not ILLiad*)

# Borrowing Analysis Example #2

- **What is our borrowing turnaround time?**
- **Borrowing Request Details:**
  - Partner Active (= Active)
  - Days of Request to Material Arrival (>0)
  - External Identifier
  - Item Arrival Date
- **Borrowing Creation Date:**
  - Borrowing Creation Date
- **Partner:**
  - Partner Name (*not ILLiad*)

# Borrowing Analysis Example #3

- **How long do my users keep RS items?**
- Borrowing Request Details:
  - Partner Active (*= Active*)
  - External Identifier (*contains SUNY*)
  - Item Loan Date (*not NULL*)
  - Item Check-In Date (*not NULL*)
- Requester
  - User Group

# Lending Analysis

- Subject Area: Borrowing Requests
- Categories of information:
  - Lending Request Details
  - Lending Creation Date
  - Due Date
  - Partner
  - Library Unit
  - Location at Time of Loan
  - Bibliographic Details
  - Physical Item Details
  - Assigned To
  - Institution

# Lending Analysis Example #1

- **Who am I lending to on a monthly basis?**
- Lending Request Details:
  - Num of Requests
  - Item Sent Date (*not NULL*)
- Lending Creation Date:
  - Lending Month
- Partner:
  - Partner Name (*not ILLiad*)



# Lending Analysis Example #2

- **How long are borrowers keeping the items we lend?**
- Lending Request Details:
  - Num of Requests
  - Days of Material Sent to Return ( $>0$ )
  - Item Return Date (*not NULL*)
- Partner:
  - Partner Name (*not ILLiad*)

# Lending Analysis Example #3

- **What is my lending fill rate?**
- Borrowing Request Details:
  - Num of Requests
  - Item Sent Date (*is NULL & is not NULL*)
  - Lending Request Status (*not Being Processed*)
- Will need to run this analysis twice and then manually calculate a fill rate

# Creating Dashboards, Reports & Widgets

- You can access an analysis directly from Alma by creating either a dashboard, report, or widget
- Dashboards - display multiple analyses at once, can be accessed through Analytic menu or be sent via email daily, weekly, or monthly
  - Must initially be created in Analytics
- Widgets - display on main Alma page
- Reports - accessed through Analytic menu, can be sent via email daily, weekly, or monthly

# Additional Analytics Resources

- SLSS Analytics Training Guide:
  - <https://slcny.libguides.com/training-analytics>
- Additional SLSS training sessions:  
<https://slcny.libguides.com/lsptraining#s-lg-box-22652021>
- Ex Libris Documentation:
  - Borrowing:  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/Alma\\_Analytics\\_Subject\\_Areas/Borrowing\\_Requests](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Borrowing_Requests)
  - Lending:  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/Alma\\_Analytics\\_Subject\\_Areas/Lending\\_Requests](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Lending_Requests)
- Salesforce & Basecamp