# RESOURCE MANAGEMENT ANALYTICS

SUNY Library Shared Services

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SUNY The State University of New York

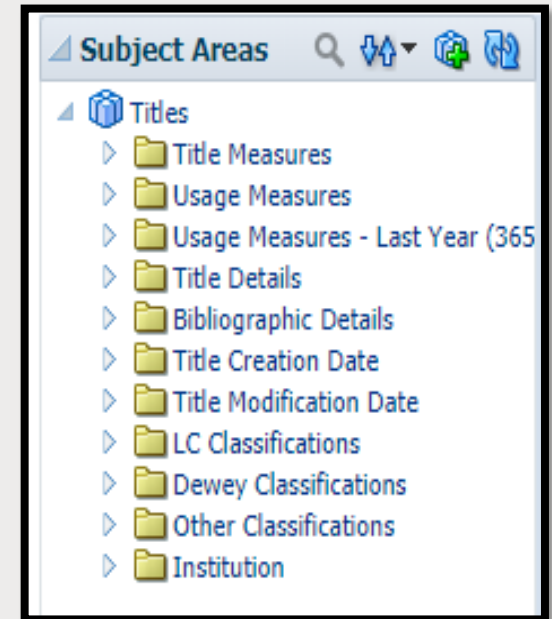# Resource Management Analytics Subject Areas

Required Role:

- Design Analytics

Commonly Used Subject Areas:

- Titles - physical, electronic, or digital titles
- Physical Items – print inventory such as, titles, holdings, locations
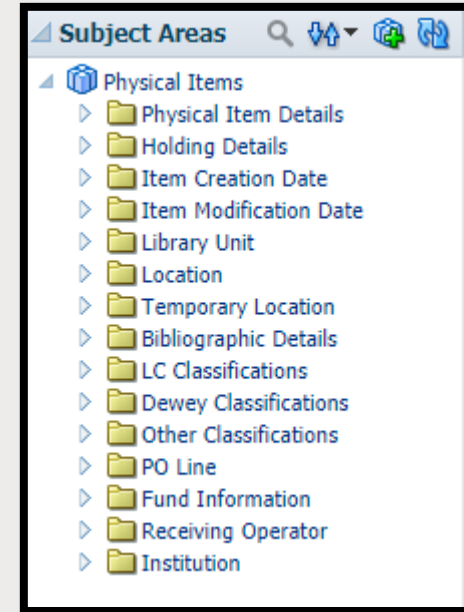- Physical Items Historical Events – historical events related to physical items

# Resource Management: Titles Subject Area

- Allows all titles to be searched regardless of resource type
    - Filters can be used to limit or exclude resource types
- Only holdings and items measurements are available
    - Item and Holdings details are not available, such as:
        - Permanent or Temporary Call Numbers
        - Barcode numbers
        - Library/locations
- Funds and Ledger information cannot be retrieved
- POL information cannot be retrieved

# Resource Management: Physical Items Subject Area

- Restricted to physical resources only
  - Cannot access e-resources
- Allows items, holdings, title and POL details
- Library and locations are available
- POL details include:
  - Fund Measures
  - POL Type
  - Fund Ledgers
  - Fiscal Period

# Resource Management: Physical Items Historical Events Subject Area

- Used to report on historical events for item records:
  - Item Transit Event
  - Item Temporary location Event
  - Item Process Status change events
  - Work Order Dept. Status change events

# ANALYTICS TIPS

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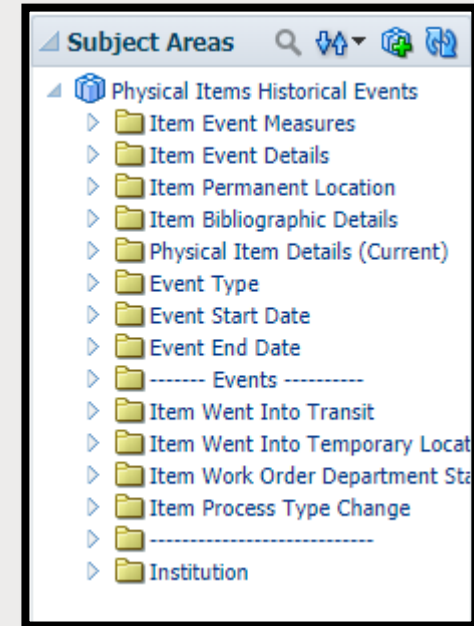
# Analytics Tips

1. Analytics times out in 30 minutes
   a) Refreshing Alma will extend the time out to 1 hour
2. Save the report regularly
3. Try different columns to get the desired results
   a) Columns do no always produce the desired results
4. Filters can be used to refine search results
5. Lifecycle is useful to limit results
   a) Lifecycle – Active or Deleted
   b) Bibliographic Lifecycle – Deleted or In Repository

# ANALYTICS FOLDER STRUCTURE

# Analytics Folder Structure

1. In Alma, go to *Analytics>Analytics>Design Analytics*

2. Click on *Catalog*

   a) Folders available under Catalog

      1) My Folder – no one else can see or use the reports

      2) Shared Folder – can be used by others

3. Click on the *Shared Folder*

   a) Key folders:

      1) **Alma** – Ex Libris Out of the box reports

         i. Use "Save As" and copy the report to your campus reports folder

         ii. These cannot be edited

      2) **Community** – All Alma users

         i. SUNY Consortia folder: *Consortia>Reports>Consortia>SUNY*

      3) **SUNY Campus 01SUNY_###** - Campus folder

         i. Campus reports are found here
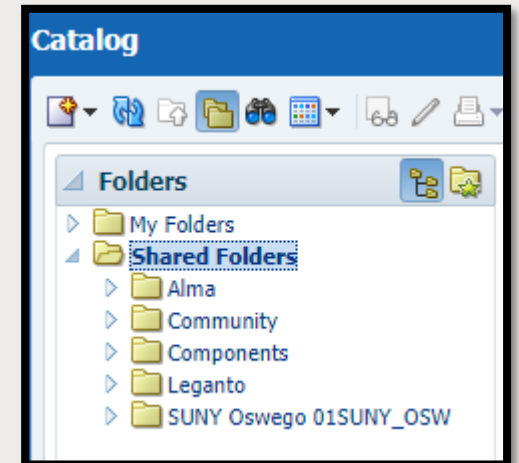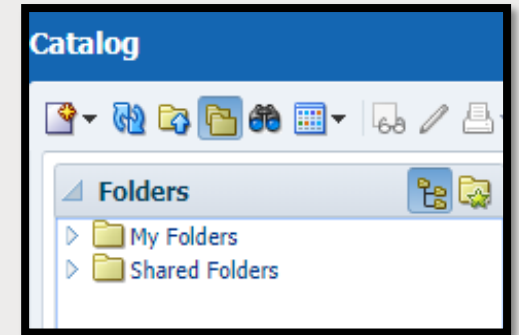
# Creating a New Sub-Folder to Campus Reports Folder

1. Click *Shared Folders>SUNY Campus 01SUNY_###>Reports*
   a) Create sub-folders to better organize reports
      a) Makes sure you are under the correct folder
      b) Click the **New** icon
      c) Click the **Folder** icon
      d) Name the Folder using your campus' naming convention
      e) Click *Ok*
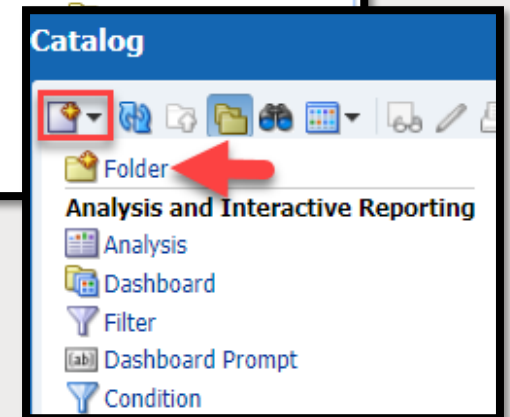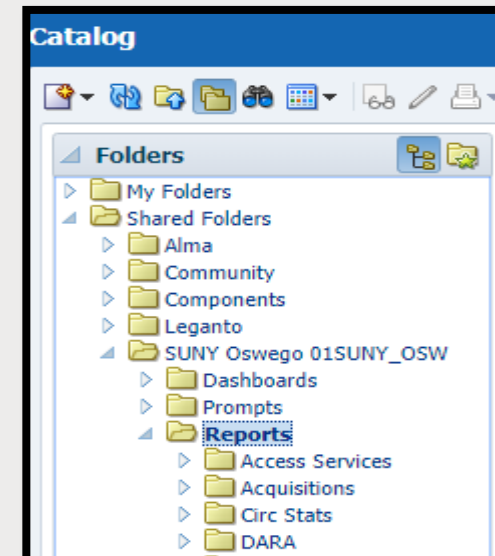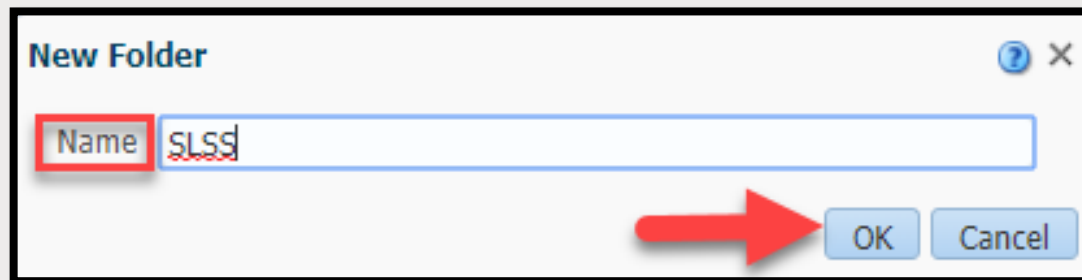
# RUNNING AND OUT OF THE BOX REPORT

# Running Out of the Box Reports

- Alma has out of the box reports that can be used by anyone
  - When a report is opened the results will be populated with the library's data
- Selecting *More* from an out of the box report will give limited functionality because the reports cannot be edited
  - Out of the box reports can be saved to another folder to be used/edited
  - It is preferable to view a report by clicking on *Edit* over selecting Copy from the More drop-down menu
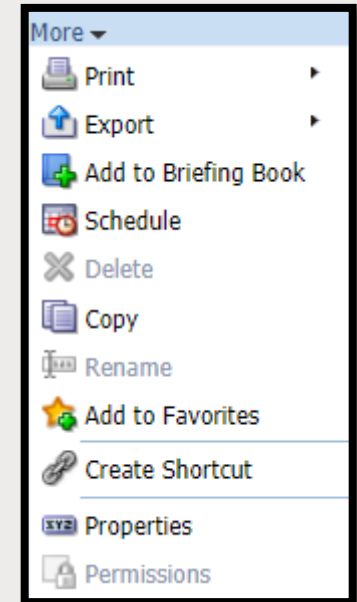
**NOTE:** Reports in other folders can be edited, copied, deleted, and renamed:
  - Make sure to click "**Save As**" and saving it to the campus reports folder before making changes
  - Never delete or rename a report from a folder that does not belong to you

# Running Out of the Box Reports

In Analytics:

1. Click *Catalog*

2. Click *Shared Folders>Alma*

3. Click on the **Folder** of the desired report

4. Click *Expand* to see the reports available

5. Click *Edit* from the report to view and copy the report
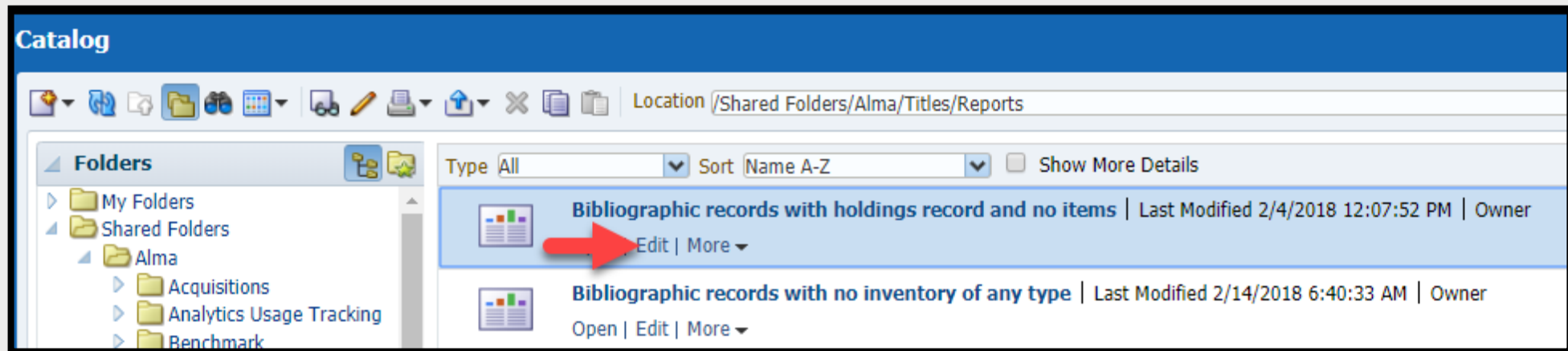


6. The Results screen displays the campus' data

# Running Out of the Box Reports

7. Click on the Criteria tab to review the report criteria



8. Determine if the report will be saved to the campus report folder to be re-used and/edited

# Saving Out of the Box Reports to Campus Reports Folders

1. Click the *Save As* icon  to edit or modify an out of the box report

2. The "Save As" screen pops up

   1. Click on Shared Folders

   2. Click on the campus shared folder

   3. Click on the Reports Folder

   4. Click on the folder where the report will be saved

   5. Edit the name and add a description (optional)

   6. Click *Ok*

3. The Report can now be edited/modified

4. Click on the *Save* icon regularly when making changes
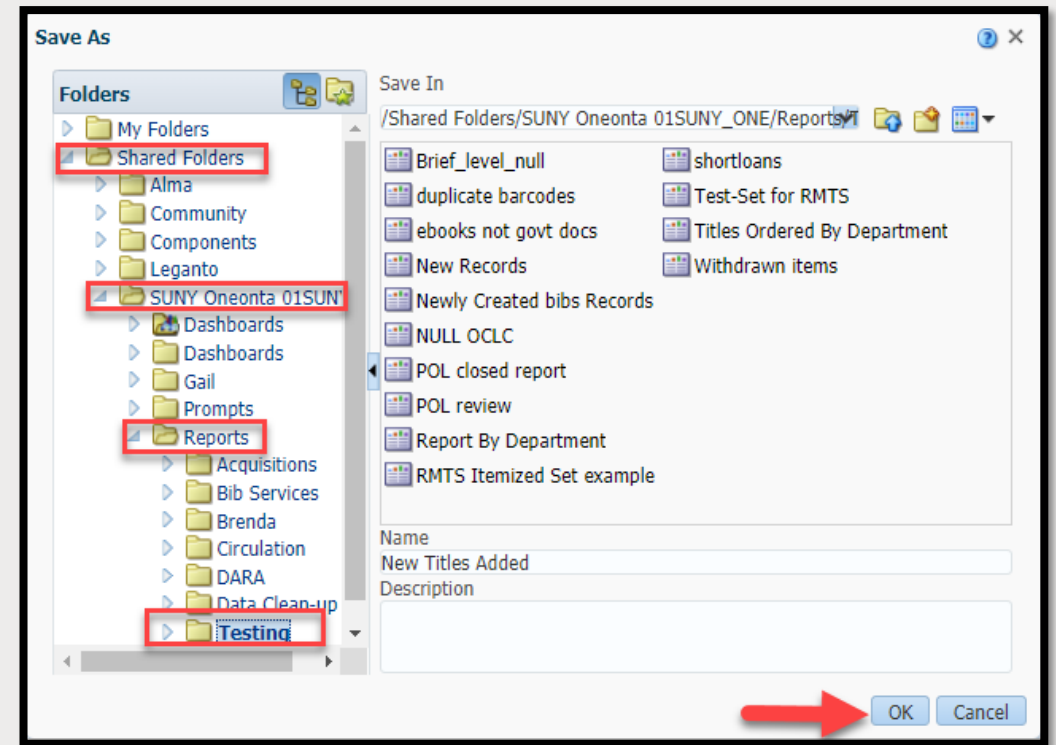
# CREATING AN ANALYTICS REPORT
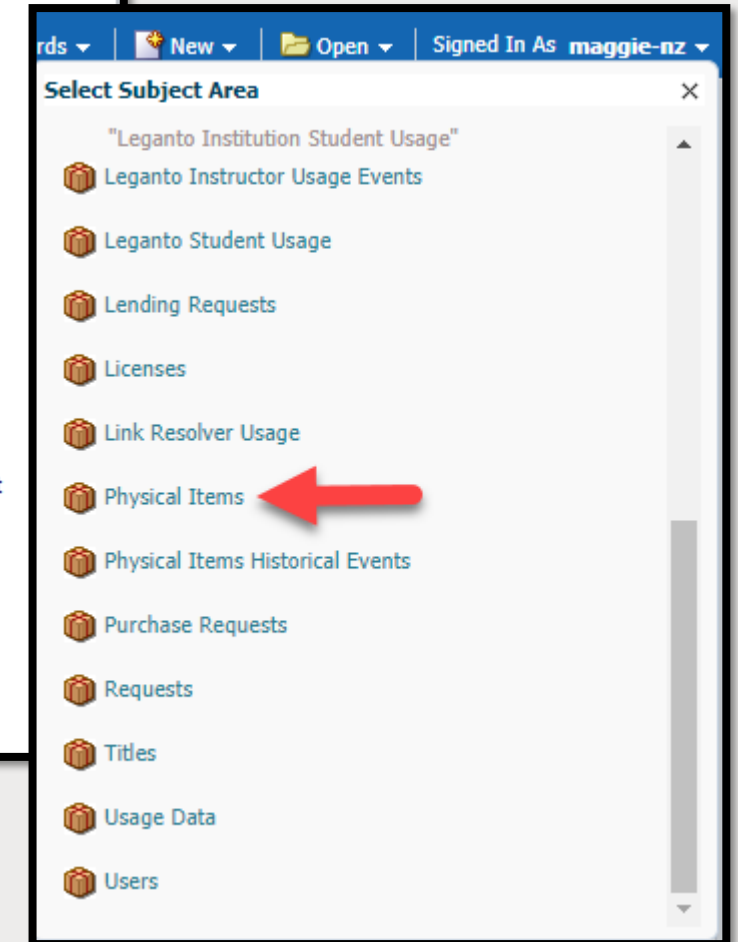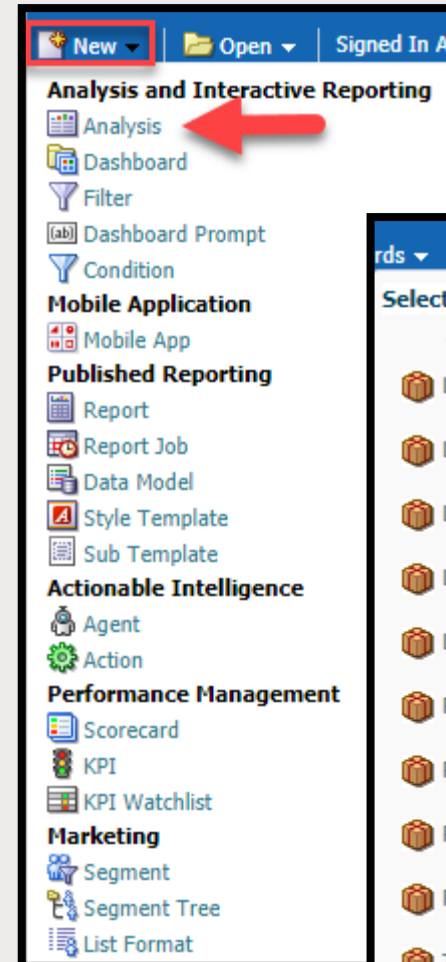
# Creating An Analytics Report

1. In Alma go to *Analytics>Analytics>Design Analytics*

2. Click on the **New** drop-down menu

3. Click *Analysis*

4. Click on the desired Subject Area

5. Click on the Subject Area folders to expand them

6. Double click or drag and drop the columns to be added to the report

7. Save the report:
   1. Click on the Save icon
   2. Select the correct path to save the file
   3. Name the report
   4. Click *OK*
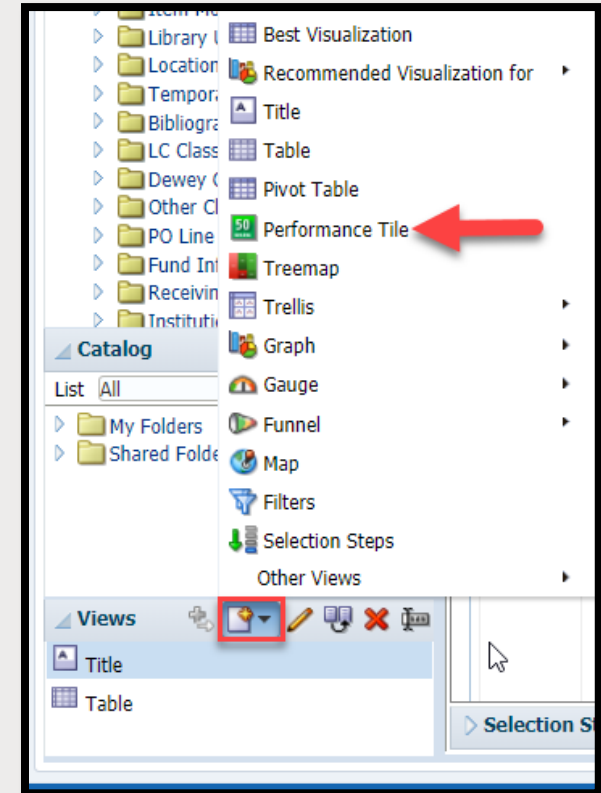
# Creating An Analytics Report

8.  Click on the **Results** tab to see how the data will display

9.  Click on the **Criteria** tab to modify the results by:

    8.  Adding/deleting columns

    9.  Adding/modifying/deleting filters

10. Click on the **Save** icon often

# ADDING A PERFORMANCE TITLE TO ANALYTICS RESULTS

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# Adding a Performance Title

A Performance Title allows the numerical measurement value to be applied to the report and displayed. To add a Performance Titles:

1. Click on the Results tab

2. Click on the New View drop-down menu
   - Located in the lower left corner of the results page

3. Click on *Performance Title*

4. Under Layout
   a) Measure – must be selected from a measurable column
   b) Label
      1) Uncheck the box to customize the label
   c) Description
      1) Uncheck the box to customize the description
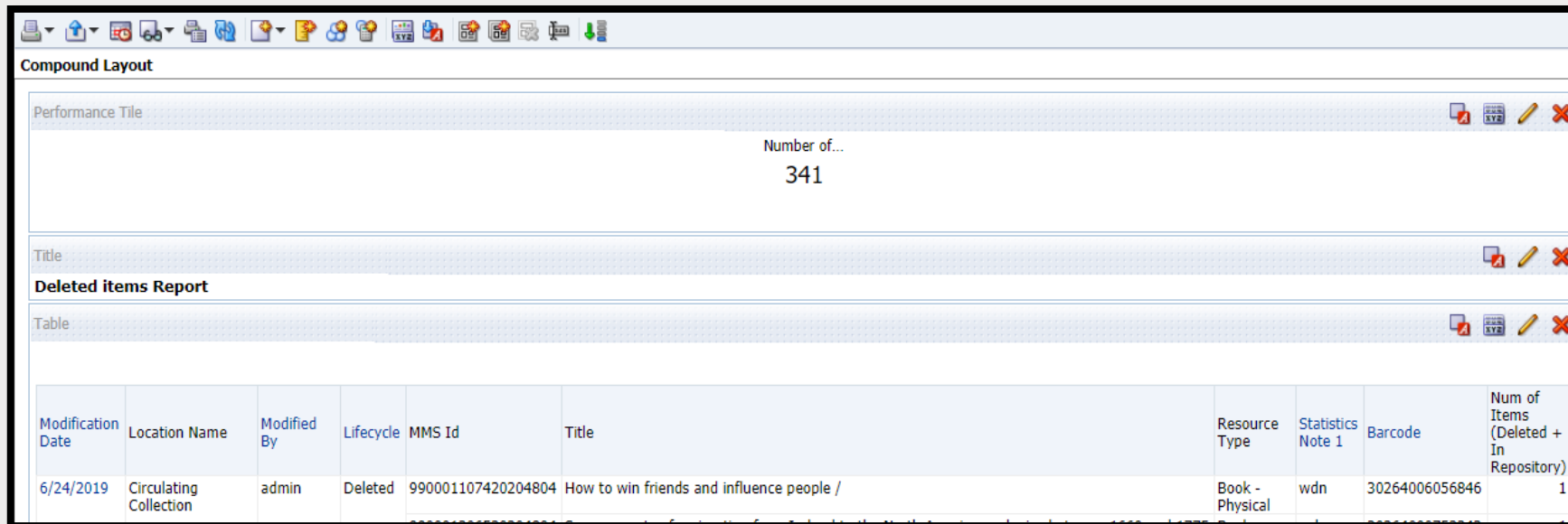   d) Click *Done*

# Adding a Performance Titles

# Adding a Performance Title

5.  Click on the Add View icon
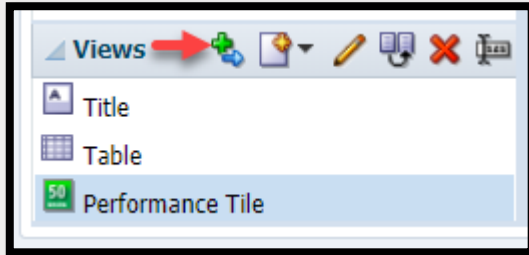


6.  Drag the Performance Title to the desire location on the results page

# EXPORTING ANALYTICS REPORT RESULTS

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# Exporting Analytics Report Results

From the Results Tab:

1. Click on the **Export** icon drop-down menu

2. Select how you want to export the results:
   a) **PDF**
   b) **Excel 2007+**
      - Limited to 65,000 rows
   c) Powerpoint 2007+
   d) Web Archive (.mht)
   e) **Data**
      1) .csv
         - Limited to 500,000 rows
      2) Tab delimited Format
      3) XML Format

3. Click **Ok** when the **Export Complete** confirmation pop-up message appears
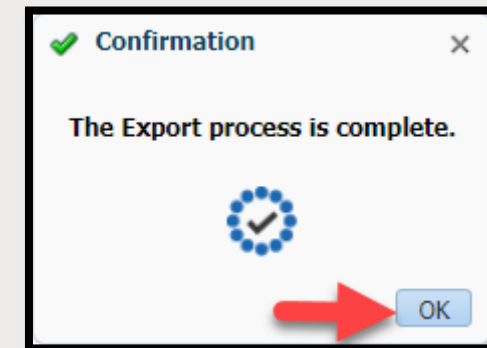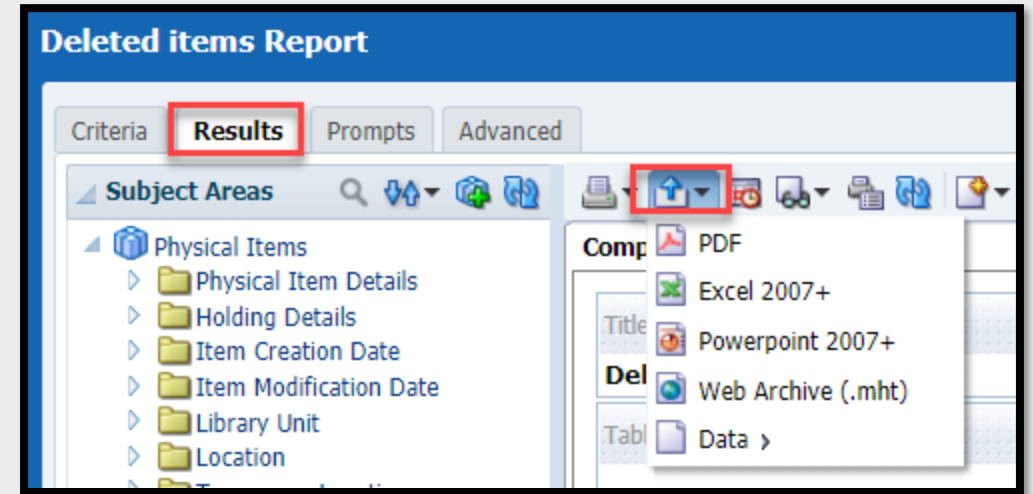
# SUPPORTING RESOURCES

# Supporting Resources

Ex Libris Documentation

- Analytics
- Alma Analytics LibGuide
- Physical Items (analytics subject areas)
- Physical Items Historical Events (analytics subject areas)
- Titles (analytics subject areas)

SLSS Analytics Training Sessions

- Alma Analytics – Analytics Basics by Kristy Lee
- Alma Analytics – Column Properties and Compound Layout by Wendy Ackerman
- SUNY Alma Analytics LibGuide