

ANZREG in July 2016 – Alma / Primo Best Practice Day

Top ~~10~~ Analytics Reports

Presented by
Amelia Rowe + Anna Clatworthy
RMIT University Library

Contact details:
amelia.rowe2@rmit.edu.au
anna.clatworthy@rmit.edu.au

ANZREG in July: Alma / Primo Best Practice Day

Introduce selves

Anna first

Amelia second, I will explain in a moment why we have put a strike through the 10

<NEXT SLIDE>

What does Top ~~10~~ Mean?

Most used Reports?

ANZREG in July: Alma / Primo Best Practice Day

Speaker : Amelia

Time: 2mins

We all agreed that we couldn't pick 10 reports to list as our top 10, so what we are sharing with you today is our top reports

Does Top 10 mean the Most used reports? <CLICK>

If so we can create a list pretty quickly.

...

Except we have to guess about most used, we don't have an Analytics report on Analytics reports

Base most used on how regularly reports are used, such as:

Reports that are used on a regular basis...

We can look at

Widgets (count these count count as run DAILY) <NEXT SLIDE>

WIDGETS

**WEEKLY
REPORTS**

Lost items for replacement cost nearly 3 months Home Catalog Favorites Dashboards New Open Signed In As E16777

10-11 weeks overdue
find replacement cost
Date run: 5/07/2016

Title	Author	ISBN	Publisher	Due date	Barcode	Call Number	Last Name	First Name	Primary Identifier	User Group	Patron expires
Financial reporting /	Loftus, Janice, author.	9780730311119; 0730311112	John Wiley and Sons Australia Ltd	26/04/2016	31259011028979	657.021894 L829					7/04/2016
Forensic psychology /	Pozzulo, Joanna, author.	0205209270; 9780205209279	Pearson Education Inc	26/04/2016	31259011683989	614.15 P894					22/09/2016
Optical fiber communications /	Keiser, Gerd.	0073380717; 9780073380711	McGraw-Hill Companies	26/04/2016	31259010235658	621.38275 K27					15/05/2016
Optical fiber communications : principles and practice /	Senior, John M., 1951-	013032681X; 9780130326812	Financial Times/Prentice Hall	26/04/2016	31259010165806	621.38275 S477					15/05/2016
Philosophy and methodology of psychology /		9781442549852; 1442549858	Pearson Choice	26/04/2016	31259010436538	FOL 150.9 P568					22/09/2016
101 techniques.	Sanmiquel, David, author.	1438001975; 9781438001975	Barron's Educational Series Inc	22/04/2016	31259011386054	751.45 O584					26/01/2017
Basic business statistics : concepts and applications /	Berenson, Mark L., author.	9781486018956; 1486018955	Pearson Australia	22/04/2016	31259009175642	519.5 B489 2016					9/02/2017

ANZREG in July: Alma / Primo Best Practice Day

Speaker : Amelia

Time: 2 mins

WIDGETS - count as daily use

These include:

Items received stats <CLICK>

Items count by process type <CLICK>

Reports that are run each week as the first step to various workflows (we can count these as **WEEKLY**) <CLICK>

Claims returned <CLICK>

Similar to the missing list, items marked as claimed returned need to be searched for on site

Lost items for replacement cost<CLICK>

In order to include an accurate replacement cost in our 'lost loans letter' someone has to fill in a cost. We opted not to go for a generic amount but to fill this in as needed. To achieve this we need a list of recently lost items for which the replacement cost can be applied.

But is quantity of use really indicative of “top” reports? <NEXT SLIDE>



Most useful reports?



ANZREG in July: Alma / Primo Best Practice Day

Speaker : Amelia

Time: 1min - bridging slide

We decided that the top 10 (or top) reports are those that were most useful. <CLICK>

Whether useful is the right tool for the job <CLICK>

The ones we like the most <CLICK>

The helpful report <CLICK>

The report that helps us discover <CLICK>

The report that is important (usually for reporting purposes) <CLICK>

We will each share with you our insights on a few reports... <NEXT SLIDE>

Anna's Top Reports : Library Resources & Access

1. Custom data clean up reports
2. Data collation reports
3. Expenditure reports
4. CAUL statistics reports



ANZREG in July: Alma / Primo Best Practice Day

Speaker Anna

Time: 1 mins

For Anna Top 10 means?

Coming at it from a Library Resources and Access POV: Cleaning and fixing

It means the reports that have been most useful to our unit, as opposed to reports that have been used the most often. These are usually either heavily customised out of the box reports or ones that have been created entirely from scratch.

Note that I am coming to analytics from a library resources POV; heavily interested in what the data stored in Alma can both tell us and do for us.

- pbk (cleanup)
- equipment (cleanup)
- ybp isbn (data collation)
- CAUL
- em's expenditure reports

<note expenditure used for reporting>

<NEXT SLIDE>

Data clean-up

Example: Removing junk data from 866 fields



pbk and hard in item description for fixing AC 06082015

Table

MMS Id	Title	Enum A	Chron i	Description
9910840990001341	"Miscommunication" and problematic talk /	hard		hard
9911334520001341	1000 years of Swiss art /	hard		hard
9911829350001341	A time and a place : developing improvised drama in the primary school /	pbk		pbk
9913058470001341	Proceedings of the National Outdoor Education Conference, 21-24 August, 1982, Wellington Teachers College.	pbk		pbk
9913160460001341	First aid in reading, writing and spelling : a handbook for parents showing them how they can teach a child to read, write and spell /	pbk		pbk
9913845570001341	Early childhood toward the 21st century : a worldwide perspective /	pbk		pbk
9913886160001341	What can a teacher do except teach? /	pbk		pbk
9914006700001341	2 saunters : summer and winter 1978 : a catena of photography and words /	hard		hard
9914161250001341	Physical diagnosis : procedures and methodology in chiropractic practice /	hard		hard
9914258050001341	Teacher appraisal : training and implementation /	pbk		pbk
999617610001341	Report of the Interim Committee on the National Estate : report to the Minister for Urban and Regional Development and the Minister for Environment, May 1975.	pbk		pbk

ANZREG in July: Alma / Primo Best Practice Day

Speaker Anna

Data cleanup - 866 fields with junk data

Reports that pick up all instances of a problem for data cleanup - can then be used to create a set in Alma for bulk editing. Records with junk data or lacking data are usually a consequence of our Alma migration, OR they're an attempt to clean up irresponsible record creation.

Not the kind of thing there exists an out of the box report for - one of the flaws (weaknesses?) I find in Alma is that it's never fully anticipated all the things we need to do. Fortunately the heavily customisable nature of Analytics means that we can fairly easily create custom reports that pull up the data we're after. Here, I was looking for all the titles that were full of this junk data that, among other things, was mucking up our book displays in Primo. As I was using this report to get a set of titles to run a normalisation rule over, I've popped in the MMS ID as a criterion, as I'm sure everyone does.

These kinds of reports - that pick up on either extra info, in which case you can specify (pbk or hard) OR where information is missing, in which case I'd set a filter to none, then either edit a set in Excel or via a normalisation rule. If there's a better way of doing this,

I'd love to know during question time.

<NEXT SLIDE>

ANZREG
Australia & New Zealand Regional ExLibris Group

Compound Layout

Pivot Table: Business College Audiovisual busav

Fund Name	Vendor Account Code	Vendor Account Name	Vendor
Library Resources	MCARD	Mastercard	Mastercard
Total			

Business College Book busbk

Fund Name	Vendor Account Code	Vendor Account Name	Vendor
Library Resources	854610	Rush	YBP US Library Services
	854620	Firm	YBP US Library Services
	854622	Slips	YBP US Library Services
	854671	Firm	YBP UK Library Services
	854672	Slips	YBP UK Library Services
	ALIBRIS	Alibris	Alibris
	DBLO	Blanket Orders	James Bennett Pty Ltd
	MCARD	Mastercard	Mastercard
	RMITUL	Firm	James Bennett Pty Ltd
Total			

Business College eBook buseb

Fund Name	Vendor Account Code	Vendor Account Name	Vendor
Library Resources	854640	Ebook Firm	YBP US Library Services
	854641	Ebook Slips	YBP US Library Services
Total			

DSC College Audiovisual dscaav

Fund Name	Vendor Account Code	Vendor Account Name	Vendor
Library Resources	854608	Audiovisual	YBP UK Library Services
	ALL ACCESS	All Access Australasia	All Access Australasia
	BAKER	BAKER	Baker and Taylor
	ELAN	Elan	Elan Media Partners
	MCARD	Mastercard	Mastercard
	RMITUL	Firm	James Bennett Pty Ltd
Total			

DSC College Book dsckbk

Selected Columns
Double click on column names in the Subject Areas pane to add them to the a

Filters
Add filters to the analysis criteria by clicking on Filter option for the specific c

- Fiscal Period Description is equal to / is in 01/01/2016 - 31/12/2016
- Transaction Item Type is equal to / is in EXPENDITURE
- Fund Ledger Name is equal to / is in Library Resources
- Code is equal to / is in busav; busbk; buseb; busitr; dscaav; dsckbk

RMIT UNIVERSITY

Speaker Anna

Time: 2 mins

Anna: This is a report used by our Acquisitions manager to collate the expenditure reports every month. It's a customised version of an out of the box report. Unfortunately the report, even customised, cannot be used as-is. As Analytics reports, when downloaded, often contain a lot of extra columns and merged or unmerged bizzos, heavy editing in Excel is required to shape the raw report into something suitable to send to Library Executive. It is however the best way we have at present for getting all of the relevant financial information out of Alma and into a useable format.

<NEXT SLIDE>

Data collation

Example: ISBNs for YBP

The screenshot displays a software interface for data analysis. It features three main sections: 'Selected Columns', 'Bibliographic Details', and 'Filters'. The 'Selected Columns' section includes a header and a sub-header, with a note: 'Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-an'. Below this is the 'Bibliographic Details' section, which lists three columns: 'Title', 'ISBN', and 'Material Type', each with a small icon and a dropdown arrow. The 'Filters' section has a header and a sub-header: 'Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Column'. Below this, there are four filter rules listed, each starting with a blue 'AND' icon and a dropdown arrow: 'Title is greater than or equal to A', 'Title is less than or equal to D', 'Material Type is equal to / is in Book', and 'ISBN is not null'.

Speaker Anna

2 mins

External purpose not internal.

Again, this is us using Analytics to get a lot of information out of Alma that we couldn't collate in another way. Briefly, as YBP customers, we send them a list of all our ISBNs twice yearly, so they can match it against their database and put the little 'you already own this' button next to titles that match the list we've sent them. It's a process and a half, as there aren't enough report rows to pull out all the ISBNs at once - I think it's several hundred thousand, particularly as titles often have multiple ISBNs. Like in expenditure reports, the raw data we pull out of Analytics needs to be heavily edited into the form that YBP needs. This is all done manually in Excel, with the accompanying joy of Excel trying to deal with ISBNs.

<NEXT SLIDE>

CAUL statistics

Physical Item Details Location PO Line
 Num of Items Location Name Library Name Acquisition Method Status Receiving Status PO Line Creation Date

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 head
 CAST (PO Line Creation Date AS ... is between 01/01/2014 and 01/01/2015

Bibliographic Details Location
 Category of Material Bibliographic Level COUNT(DISTINCT MMS Id) Library Name Location Name

Portfolio Electronic Collection Electronic Collection Material Type
 No. of Portfolio (Deleted + In Repository) Public Name Code

Portfolio PO Line Portfolio
 Acquisition Method PO Line Year Status Reporting Code Description No. of Portfolio (In Repository)

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 h
 Reporting Code Description is equal to / is in Alert Autoship eBook; Business College Streamed Media; Business College eBook; Collection Deve
 eBook Loan; Off Air Digitizing; Outsourced Cataloguing eBook; Patron Driven Acquisition eBook; Replacement ebook; SEH College Streamed Media;
 AND EXTRACT(YEAR FROM PO Line Cre... is equal to / is in 2015

Speaker Anna

Like everyone who is a part of CAUL, we have to them provide comprehensive statistics about all aspects of the library. My previous team provided all the data relating to library resources, using reports like the ones displayed here. Not useful for uses but rather reporting purposes. IF REQ'D CUT FOR TIME
 <NEXT SLIDE>

Amelia's Top Analytics Reports



ANZREG in July: Alma / Primo Best Practice Day

Speaker Amelia

For Amelia Top 10 means?

For me (Amelia) the top reports are those that provide us with information, especially regarding user behaviour.

Which can be used when making decisions about what works / what doesn't and what/how we can improve the user experience.

<NEXT SLIDE>

Link Resolver Usage

Link Resolver Usage BRIEF | Last Modified 16/05/2016 11:04:53 AM | Owner 1234569150001341_1341_D
Brief Link resolver stats report
Open | Edit | More

Link Resolver Usage DETAILS | Last Modified 13/05/2016 9:01:14 AM | Owner 1234569150001341_1341_D
Link Resolver report for AR
Open | Edit | More

Source								Requests Without Services from Users
AMS:MathSciNet	9	1	0	1	9	11.11%		100.00%
CAS:CAPLUS	99	33	65	39	61	33.33%		61.62%
CAS:MEDLINE	14	10	30	12	4	71.43%		28.57%
EI:Compendex	94	26	41	27	73	27.66%		77.66%
Entrez:PubMed	1,635	601	1,686	731	972	36.76%		59.45%
INFORMIT:AATD	2	0	0	0	2	0.00%		100.00%
INFORMIT:AEIPT	83	27	54	32	59	32.53%		71.08%
INFORMIT:AFPD	4	1	6	1	2	25.00%		50.00%
INFORMIT:AGISPT	140	46	77	47	76	32.86%		54.29%
INFORMIT:AHB	15	0	0	0	15	0.00%		100.00%
INFORMIT:AIATSSIS	2	0	0	0	2	0.00%		100.00%

ANZREG in July: Alma / Primo Best Practice Day

Speaker: Amelia

As already mentioned by Rachel, I too have to pick the **Link Resolver Usage** report

Why I list Link Resolver usage in my top analytics reports:

- This report provides an insight into both usage and user behaviour

For this I use two variations on this report.<CLICK>

The report ending in **BRIEF** is run monthly with the purposes of sharing to other areas of the library. (reporting purposes / ideas of usage) .<CLICK>

For this only totals and source are important.

<CLICK>The report ending in **DETAILS** is used when I want to analysis the information.

This report includes request parameters such as title, date etc.

This report is only run when there is a desire to look at the sorts of items being requested (or more likely the sorts of materials resulting in 'Request without service' – as Rachael has already spoken about)

In addition I find the Link Resolver usage report can tell us about what resources users

access full text from:

- Can tell us what resources (Alma / PCI / database / google scholar) users are using when they search for full text
 - Alma = 20 % / PCI 71% / google scholar 2% / unknown = 4%
 - PCI usage stats (shows the value of PCI access)
 - +ve we now have the source field which saves time filtering the report to find the source by : _ etc

Report is useful in identifying what resources users want full text access to (with further analysis of the details – such as titles being searched)

<NEXT SLIDE>

Zero Result Searches (01 June 2016 - 30 June 2016)

Search String	Searches	Signed In	Search Scope
9780730321705	18	1	Books and multimedia
Binan Goonj under Government Polices	10	1	Books articles and more
A	8	3	
" renovate workplace "	7	0	Books articles and more
--	7	0	Books articles and more
Binan Goonj	7	0	Books articles and more
LAW2524	7	2	Books articles and more
0135990440	6	0	Books and multimedia
Binan Goonj under Government Polices)	6	2	Books articles and more
CIVE1217	6	1	Books articles and more
" be preferred employer"	5	0	Books articles and more
0002214679	5	0	Books articles and more
9781488609077	5	3	Books articles and more

Primo Analytics : Zero Result report

Speaker: Amelia

Now I'm going to look at Primo Analytics, which is where I spent most of my Analytical energies.

Within my role, the front end and the user experience are of interest.

I could talk about any of the Primo reports extensively, but will focus on two.

My favourite = Zero Result Searches (which gets comments monthly from staff when shared internally via our library times blog)

And Total searches = which I'm still trying to decide the best way to create

Zero Results report

This is run monthly (email / subscription with -30 regular expression to pick up days)

From this report the top zero result searches are shared with the library staff via Library Times (RMIT Library internal blog). <CLICK>

This has proven useful in informing staff of some of the possible issues students are having finding resources.

Almost every month someone comments something along the lines of "we should get x" or "why couldn't they find y, I can find it"

Generally speaking sharing these (and the popular searches) has sparked conversations in the library about:

- discoverability of resources (such as what fields are searchable in Primo, I'll give you an example of this in a minute) ;
- the need to educate students about citations (a lot of zero result searches look like copy and pasted citations - possibly from their reading lists) ; and
- These conversations have also resulted in the discovery of issues with Primo's handling of user queries for example curly versus straight quotation marks (see case #00174730).

Note: in the Library times report on screen 3 of 4 ISBNs that were searched for by users (5 or more times) and returned zero results were for items we held, but the particular ISBN was missing from our catalogue records (a good example of the value of e and alternative ISBN and ISSNs in records).

Furthermore, detailed analysis of the zero results data can find some interesting things.

For instance our LR&A team recently asked a student placement student to take the time to look at the zero results report (she had data from 01 Jan 2016 to 31 May 2016) From her analysis (which is worthy of it's own presentation) we are in the process of making the following improvements:

- adding edition statement to the search index for our Alma records in Primo (previously edition displayed but was not searchable)

Analysis zero result searches showed that removing the edition statement resulted in successful searches. Highlighting the value of edition information to users searches.

- further analysis of call number searches to be done to determine if they should be added to the Primo search index

In addition, I am currently working with our liason staff for IST (in service training session) where these findings are forming part of the topics to cover – from the need to education students in how to read a citation (many zero result searches are likely to be copy and pasted), to hands on examples of where our users are 'going wrong'.

<NEXT SLIDE>

Action Search totals

Prior to 2015
Total Search stats - Action Usage report

Actions	Signed In	Action	Action Group
4,512	1,679	AZ list	Search
8,878	4,379	Advanced search	Search
474	104	Basic search	Search
1	0		
177,809	48,464		
6,612	1,626		
10	4		
7	7		
198,303	56,263	Grand Total	

Action Group	Action Sub Group	Action	Search Scope Type	Actions
Document	General	Click on Icon		3,693
Document	General	Click on title		347,283
Document	General	Display FRBR versions		32,504
Document	General	Display versions		23
Document	Lateral Linking	Lateral Linking – Author		473
Document	Lateral Linking	Lateral Linking – Subject		693
Document	Tab	Virtual browse		8,795
Results List	General	Expand PC Results (Checked)		38
Results List	General	Expand PC Results (Unchecked)	Blended	1,079
Results List	General	Expand PC Results (Unchecked)		51
Results List	General	Facet filtering		8,472
Results List	General	Facet filtering	Blended	83,430
Results List	General	Facet filtering	Local	1,157
Results List	General	Remove facet filtering		1,065
Results List	General	Suggested Search – Author		557
Results List	General	Suggested Search – Subject		1,257
Results List	General	bX Hot Articles		1,798
Search	Browse	Browse Dewey call numbers		531
Search	Browse	Browse authors		112
Search	Browse	Browse related records		748
Search	Browse	Browse subjects		145
Search	Browse	Browse titles		217
Search	Search	AZ list		10,679
Search	Search	Advanced search	Blended	20,921
Search	Search	Advanced search	Local	921
Search	Search	Basic search		5
Search	Search	Basic search	Blended	426,062
Search	Search	Basic search	Local	9,551
Search	Search history	Saved query		19
Search	Search history	Session query		46
Grand Total				962,325

ANZREG in July: Alma / Primo

Speaker: Amelia

Finally, and I will be quicker with this one
Getting Primo Analytics - **Search Totals**

Prior to 2015 we used Primo reports (out of the box reports– BIRT reports) to get stats on Primo.

Search statistics was used to get total searches for reporting purposes.

In 2015 Primo Analytics was introduced.

But there is no equivalent report to the Search Statistics BIRT report in Primo Analytics. So I was faced with the problem of creating an equivalent report using the Action Usage reports

I can either generate a report of Action = Search <CLICK>

But that is a number greatly less than what our total searches used to bring with the BIRT report

OR

I can generate a report that includes other parameters that are search like (such as

Refine by subject etc) <CLICK>

As you can see there is a difference in number of elements included, but also in totals.

At this stage I am running both reports monthly....I suspect a day will come when we must to draw a line in the sand and say from x date our reporting technique and total numbers changed.

<NEXT SLIDE>

Future thoughts



ANZREG in July: Alma / Primo Best Practice Day

Speaker: Amelia

Finally, while the future isn't a report, putting this presentation together made us wonder - What will Analytics provide us in the future? AND What uses will we have for it?

Amelia future thoughts:

Does Analytics give us access to Big Data about our libraries? Could they be used for:

- **Trend Analysis**

Search trends + Primo analytics Top searches

- Correlation between top searches and AdWords
- Library Quest <meteorite collision in top 20 for the months that Library Quest was being run>See how search totals trend with semesters
- How searched for and requested items trend (example: recommended readings + textbooks)

- **Supporting documentation regarding UX**

UX testing can be a time consuming process, can analytics reports be used to inform where improvements are needed - for example how the zero results report is being used at RMIT

Anna, future thoughts

Analytics for Digital Collections

metrics / measurable / reporting

<NEXT SLIDE>

Questions, Corrections & Comments

ANZREG in July: Alma / Primo Best Practice Day

Note: if anyone would like a copy of any of these reports or more information on how they are created to contact us.