



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

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Introduce selves

Anna first

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





What does Top 10 Mean?

Most used Reports?

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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>

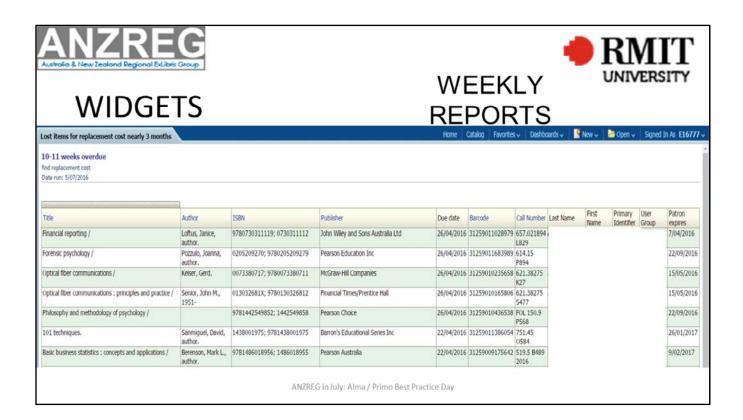
If so we can create a list pretty quickly.

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>



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>



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



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Speaker Anna Time: 1 mins

For Anna Top 10 means?

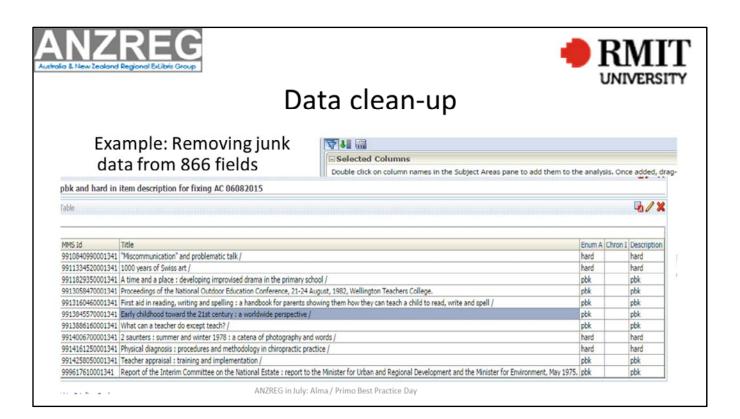
Coming at it from a Library Resources and Access POV: Cleaning and fixing

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 isbns (data collation)
- -CAUL
- em's expenditure reports

<note expenditure used for reporting>



Speaker Anna

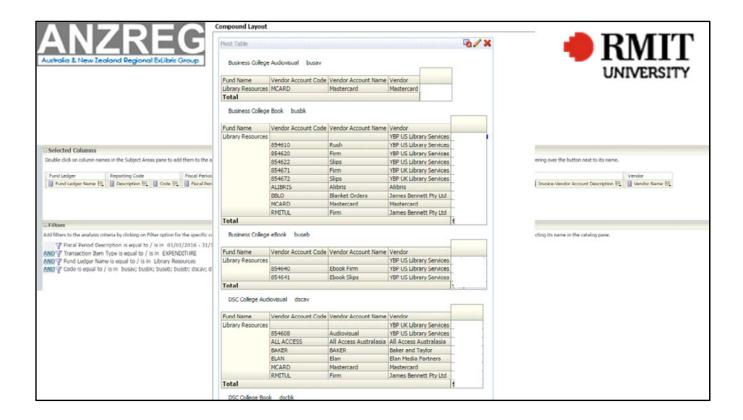
Data cleanup - 866 fields with junk data

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>



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 in 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.





Data collation

Example: ISBNs for YBP

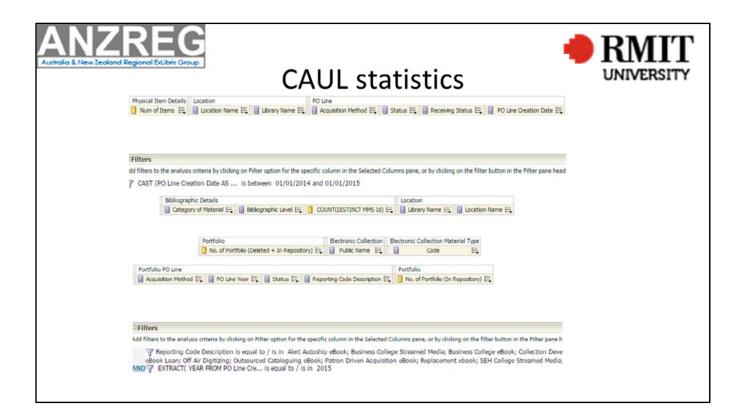
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Speaker Anna

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.



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





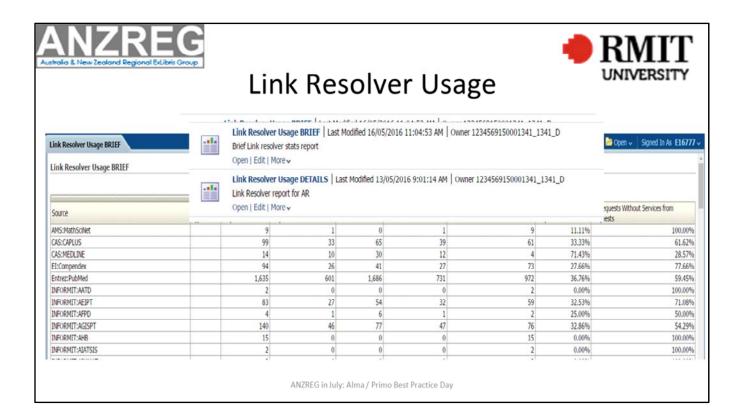
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Speaker Amelia

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>



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)

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	Zero Result Searches (01 Jun	e 2016 - 30 June 20	16)		UNIVERSITY
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	Binan Goonj under Government Polices	10	1	Books articles and more	
	A	8	3		
	" renovate workplace "	7	0	Books articles and more	
Primo Analytics:	1.E.	7	0	Books articles and more	
Zero Result report	Bianan Goonj	7	0	Books articles and more	
Zero Result report	LAW2524	7	2	Books articles and more	
	0135990440	6	0	Books and multimedia	
	Binan Goonj under Government Polices)	6	2	Books articles and more	
	GIVE1217	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	

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'.

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1111	Saarch et	tate - Act	ion Usage repo	ret	Document	General	Display versions	1	23
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					Results List	General	Facet filtering		8,472
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	8,878	4,3/9			Results List	General	Remove facet filtering		1,065
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0	17 1				Results List	General	Suggested Search – Subject		1,257
	1	0	-	Search	Results List	General	bX Hot Articles		1,798
	177.000	40 464			Search	Browse	Browse Dewey call numbers		531
	177,809	48,464			Search	Browse	Browse authors		112
	6,612	1,626			Search	Browse	Browse related records		748
	0,012	1,020			Search	Browse	Browse subjects		145
	10	4			Search	Browse Search	Browse titles AZ list	-	217 10,679
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						Search history	Session query		46
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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 Anlaytics 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 tecnique and total numbers changed.





Future thoughts



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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)

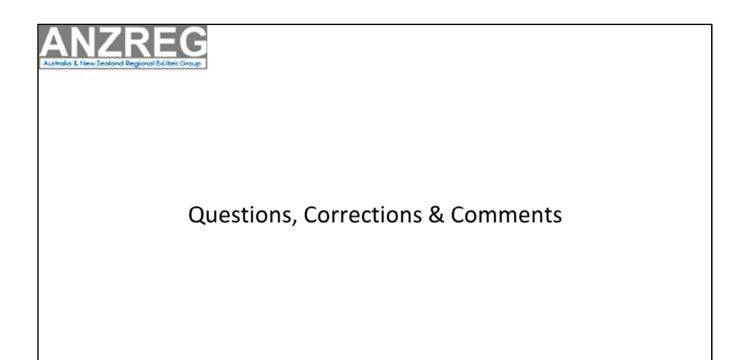
Supporting documentation regarding UX

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



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

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