



La Trobe University- Our Top Analytics Reports

ANZREG in July 2016 - Alma / Primo Best Practice Day

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ANZREG in July: Alma / Primo Best Practice Day

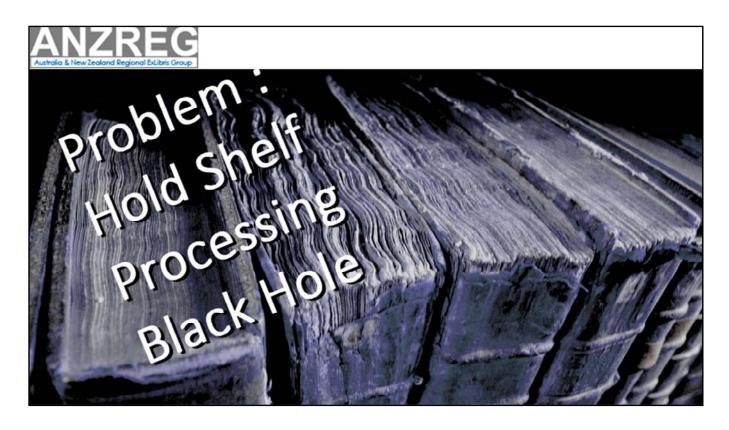
Rachel Salby
La Trobe University
Responsible for the administration of Alma, Primo, other library systems, electronic resources and general troubleshooting.

Many people think Analytics is just for gathering usage and collection statistics- and it is a very handy tool for these. But when looking at our most useful reports, I was struck by how often we used Analytics to deal with...



Identifying and solving problems in ways that can't be done in Alma itself. Problems to do with :

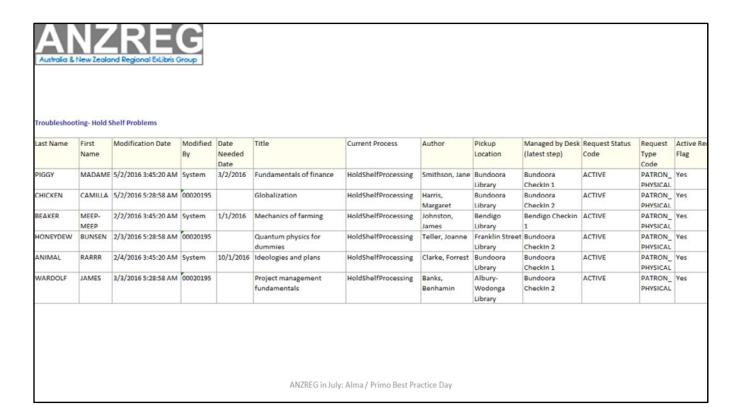
- Alma records (item, bib, order, user, etc).
- Primo
- Integration with other systems
- Even problems with sources such as the Library's reading list provider Talis, Google Scholar, and OpenURL links in databases.



2 minutes

THE PROBLEM

A few months ago we found that we had a lot of titles on our hold shelf that weren't being picked up. What's more, they weren't being put onto the Expired Hold Shelf List, which meant the only way we discovered them was by going through the holds manually and checking due dates. And then when we did scan them in to go back to their normal location, they would instead scan back on to the Hold Shelf again.



IDENTIFICATION

I created a report in Analytics using the Request subject area that collected problem items and showed as many possible Request fields as possible, in the hope we could identify the problem.

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		Modified By	Date Needed Date	Title	Current Process	Author	Pickup Location	Managed by Desk (latest step)	Request Status Code	Request Type Code	Active Flag
MADAME	5/2/2016 3:45:20 AM	System	3/2/2016	Fundamentals of finance	HoldShelfProcessing	Smithson, Jane		Bundoora Checkin 1	ACTIVE		Yes
CAMILLA	5/2/2016 5:28:58 AM	00020195		Globalization	HoldShelfProcessing	Harris, Margaret	Bundoora Library	Bundoora Checkin 2	ACTIVE		Yes
MEEP- MEEP	2/2/2016 3:45:20 AM	System	1/1/2016	Mechanics of farming	HoldShelfProcessing	Johnston, James	Bendigo Library	Bendigo Checkin	ACTIVE	PATRON_ PHYSICAL	Yes
BUNSEN	2/3/2016 5:28:58 AM	00020195		Quantum physics for dummies	HoldShelfProcessing	Teller, Joanne			ACTIVE		Yes
RARRR	2/4/2016 3:45:20 AM	System	10/1/2016	Ideologies and plans	HoldShelfProcessing	Clarke, Forrest	Bundoora	Bundoora	ACTIVE		Yes
JAMES	3/3/2016 5:28:58 AM	00020195		Project management fundamentals	HoldShelfProcessing	Banks, Benhamin	Albury- Wodonga	Bundoora Checkin 2	ACTIVE	PATRON_	
				ANZREG in July	· Alma / Primo Bost Pr	ectico Day					
F .	First Name MADAME CAMILLA MEEP- MEEP BUNSEN RARRR	MADAME 5/2/2016 3:45:20 AM CAMILLA 5/2/2016 5:28:58 AM MEEP- MEEP- BUNSEN 2/3/2016 5:28:58 AM RARRR 2/4/2016 3:45:20 AM	First Modification Date By MADAME 5/2/2016 3:45:20 AM System CAMILLA 5/2/2016 5:28:58 AM 00020195 MEEP- 2/2/2016 3:45:20 AM System MEEP BUNSEN 2/3/2016 5:28:58 AM 00020195 RARRR 2/4/2016 3:45:20 AM System	First Modification Date By Needed Date MADAME 5/2/2016 3:45:20 AM System 3/2/2016 CAMILLA 5/2/2016 5:28:58 AM 00020195 MEEP- 2/2/2016 3:45:20 AM System 1/1/2016 MEEP BUNSEN 2/3/2016 5:28:58 AM 00020195 RARRR 2/4/2016 3:45:20 AM System 10/1/2016	Modification Date Modified Date Needed Date Date Needed Date Date	First Name Modification Date By Modified Date Needed Date Needed Date Needed Date MADAME 5/2/2016 3:45:20 AM System 3/2/2016 Fundamentals of finance HoldShelfProcessing Globalization HoldShelfProcessing HoldShelfProcessing HoldShelfProcessing HoldShelfProcessing MEEP- 2/2/2016 3:45:20 AM System 1/1/2016 Mechanics of farming HoldShelfProcessing MEEP- BUNSEN 2/3/2016 5:28:58 AM 00020195 Quantum physics for dummies HoldShelfProcessing HoldShelfProcessing JAMES 3/3/2016 5:28:58 AM 00020195 Project management HoldShelfProcessing HoldShelfProcess	First Modification Date By Modified Date Needed Date MADAME 5/2/2016 3:45:20 AM System 3/2/2016 Fundamentals of finance HoldShelfProcessing Smithson, Jane CAMILLA 5/2/2016 5:28:58 AM 00020195 Globalization HoldShelfProcessing Margaret MEEP- 2/2/2016 3:45:20 AM System 1/1/2016 Mechanics of farming HoldShelfProcessing Johnston, James BUNSEN 2/3/2016 5:28:58 AM 00020195 Quantum physics for dummies HoldShelfProcessing Teller, Joanne dummies RARRR 2/4/2016 3:45:20 AM System 10/1/2016 Ideologies and plans HoldShelfProcessing Clarke, Forrest JAMES 3/3/2016 5:28:58 AM 00020195 Project management fundamentals HoldShelfProcessing Banks, Benhamin	First Name Modification Date By Modified Date Needed Date MADAME 5/2/2016 3:45:20 AM System 3/2/2016 Fundamentals of finance HoldShelfProcessing Camilla S/2/2016 5:28:58 AM 00020195 Globalization HoldShelfProcessing Margaret Library MEEP- 2/2/2016 3:45:20 AM System 1/1/2016 Mechanics of farming HoldShelfProcessing Johnston, James Library MEEP- Bunsen 2/3/2016 5:28:58 AM 00020195 Quantum physics for dummies HoldShelfProcessing Teller, Joanne Franklin Street Library HoldShelfProcessing Oldstand Clubrary HoldShelfProcessing Teller, Joanne Library HoldShelfProcessing Clarke, Forrest Bundoora Library HoldShelfProcessing Oldstand Clarke, Forrest Bundoora Library JAMES 3/3/2016 5:28:58 AM 00020195 Project management fundamentals HoldShelfProcessing Banks, Benhamin Wodonga Library	First Name Modification Date By Modified Date By Needed Date Needed Date S/2/2016 3:45:20 AM System 3/2/2016 Fundamentals of finance HoldShelfProcessing Author Location (latest step) MADAME S/2/2016 5:28:58 AM 00020195 Globalization HoldShelfProcessing Harris, Bundoora Lubrary Checkin 2 Margaret Lubrary Checkin 2 Margaret Lubrary Checkin 2 Margaret Lubrary	First Name Modification Date By Needed Date MADAME \$/2/2016 3:45:20 AM System ACTIVE CAMILLA S/2/2016 5:28:58 AM MO020195 Globalization HoldShelfProcessing MEEP- MEEP BUNSEN Z/3/2016 5:28:58 AM MO020195 Quantum physics for dummies Z/3/2016 3:45:20 AM System J/1/2016 Mechanics of farming HoldShelfProcessing HoldShelfProcessing HoldShelfProcessing Johnston, James Library Checkin 1 ACTIVE Library Checkin 2 ACTIVE Library Checkin 1 ACTIVE Library Checkin 2 ACTIVE Library Checkin 1 ACTIVE Library Checkin 1 ACTIVE Library Checkin 1 ACTIVE Library Checkin 1 ACTIVE Library Checkin 2 ACTIVE Library Checkin 1 ACTIVE Library Checkin 2 ACTIVE Library Checkin 1 ACTIVE Library Checkin 2 ACTIVE Checkin 1 ACTIVE Checkin 2 Library Checkin 2 ACTIVE Checkin 1 ACTIVE Checkin 2 Library Checkin 2 Checkin 3 Checkin 2 Checkin 3 Checkin 3 Checkin 3 Checkin 3 Checkin 3 Checkin 4 Checkin 4 Checkin 5 Checkin 6 Checkin 6 Checkin 7 Checkin 8 Checkin 8 Checkin 8 Checkin 9 Checkin 9 Checkin 9 Checkin 1 Checki	Modification Date Name Modified By Name Name

It quickly became apparent that the problem lay with this HoldShelfProcessing status. In Alma, you can choose to have an extra step in your Hold Shelf Process before they go on the Hold Shelf itself. This happens when you don't select "Place Directly on Hold Shelf" when scanning in items. It prints off a slip and it looks like a Hold slip, but the patron doesn't get a notification. And when you scan it in again, thinking you're scanning it back to the normal location, Alma instead thinks you want to move it from the HoldShelfProcessing to the actual Hold Shelf.

SOLUTION

This let us know that we needed to teach staff about the importance of checking the "Place Directly on Hold Shelf" option when scanning items.

Last Name	First Name	Modification Date	Modified By	Date Needed	Date Needed	Current Process	Author	Pickup Location	Barcode	Managed by Desk (latest step
BIRD	BIG	5/6/2016 3:45:20 PM	System	Date 7/5/2016	Passed? Date Needed Passed	HoldShelfProcessing	Maran, Rita.	Bundoora Library	32934013381837	Bundoora CheckIn 1
GROUCH	OSCAR	5/6/2016 1:55:46 PM	System		Passed	HoldShelfProcessing	Cartwright, Julia, 1851- 1924.	Bundoora Library	32934010057075	Bundoora CheckIn 1

Now, you can't eliminate all errors, so we have set up a daily report that lets us know any items that are stuck in this HoldShelfProcessing status. This means they are only in the incorrect stage for a day, rather than over a week.



THE PROBLEM

We are currently in the process of setting up integration between our Alma Acquisitions and the University Finance Systems, so that invoices can be paid in Alma and sent electronically to the finance system. Currently, this process is done manually, which is a lot of extra staff time, duplication of work, and an increased risk of mistakes.

Finance agreed that we could implement this integration but they had a couple of auditing requirements first:

- Needed a list of every invoice approved in Alma, including who approved it.
- Needed to ensure only certain users could approve invoices.
- Needed to ensure that whoever approves an invoice wasn't the person who created it.

Alma itself doesn't offer the functionality to meet these requirements. Analytics, however...

		roup					
		past month- bri					
Invoice- Approved By	Invoice approver different to order creator?	Invoice- Approval Date	Invoice- Approval Status	PO Number	PO Line Reference	Invoice- Number	Invoice Line Total Price AUD
Bear, Fozzie	Yes	6/16/2016	APPROVED	PO-19201	POL-1701	0590-9258- 3967	60
Bear, Fozzie	Yes	6/22/2016	APPROVED	PO-60602	POL-784	SN0015010406 2016	76
Bear, Fozzie	Yes	6/22/2016	APPROVED	PO-60603	POL-776	SN0015010406 2016	76
Bear, Fozzie	Yes	6/22/2016	APPROVED	PO-60604	POL-785	SN0015010406 2016	76
Bear, Fozzie	Yes	7/1/2016	APPROVED	PO-136107	POL-9629	00160880	182
Bear, Fozzie	Yes	7/1/2016	APPROVED	PO-32002	POL-3218	00160530	186
Frog, Kermit	Yes	6/20/2016	APPROVED	PO-11709	POL-1096	0081782	247
Frog, Kermit	Yes	6/20/2016	APPROVED	PO-132807	POL-885	0081782	100
Frog, Kermit	Yes	6/20/2016	APPROVED	PO-13901	POL-1318	0081782	132
Frog, Kermit	Yes	6/20/2016	APPROVED	PO-15903	POL-334	0081782	111

We were able to make a report, sent monthly to their email, which met all of their criteria.



Invoice Approvals- Security Check

The following users with Invoice Approval status have been modified in the past day

Last Name	First Name	Primary Identifier	Modified By	Modification Date
Piggy	Miss	00078678	Salby, Rachel Louise	7/5/2016

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A month later, they came back with the extra requirement: A monitoring process to ensure that System Admins couldn't login as an Alma user with Invoice Approval privileges and approve an invoice. Now, this is possible in Alma, but luckily this leaves an electronic trail which we can pick up in Analytics.



PROBLEM

And now on to a problem with a different system integration. We receive our patron loads from the Student Information System on a daily basis. Records sometimes come over with missing information- the user doesn't have a User Group listed. The User Group specifies if they are an Undergrad, Postgrad, etc, which in turn determines their borrowing privileges. Without a user group listed, the user is unable to borrow or perform any other circulation functions. Previously, the only way we found out about this was when the student came to the desk unable to use the self-checkout machine. This was particularly a problem at times when we had lots of new students, like the start of semester, and they were coming to the desk to borrow.



Users without User Group

TOTAL USERS 876

First Name	Last Name	Expiry Date	User Group Code	Campus Code	Primary Identifier	Email
Beauregard	Brown	3/15/2017		BUND	18238972	18238972@students.latrobe.edu.au
Betsy	Davies	3/15/2017		CITYC	18039706	18039706@students.latrobe.edu.au
Big	Evans	3/15/2017		BUND	17929378	17929378@students.latrobe.edu.au
Gaffer	Jackson	3/16/2017	Î	BEND	18978611	18978611@students.latrobe.edu.au
Crazy	Johnson	8/31/2016		BUND	18609345	18609345@students.latrobe.edu.au
Animal	Jones	8/31/2016		BUND	18498420	18498420@students.latrobe.edu.au
Dr.	Lewis	3/15/2017		BUND	18639406	18639406@students.latrobe.edu.au
Camilla	Roberts	3/15/2017		AL_WODONGA	18775960	18775960@students.latrobe.edu.au
Droop	Robinson	3/16/2017		SHEP	15107778	15107778@students.latrobe.edu.au
Annie	Taylor	3/15/2017		BUND	18522236	18522236@students.latrobe.edu.au
Boppity	Thomas	3/15/2017		BUND	18614857	18614857@students.latrobe.edu.au
Flying	Thompson	3/15/2017	Į.	BUND	18982334	18982334@students.latrobe.edu.au
Dr.	Walker	8/31/2016	l,	CITYF	18903627	18903627@students.latrobe.edu.au
Fozzie	Watson	8/31/2016	ė.	BUND	18979013	18979013@students.latrobe.edu.au
Foo-foo	White	9/1/2016		BEND	18979272	18979272@students.latrobe.edu.au
Beaker	Williams	3/15/2017	j e	BUND	18584036	18584036@students.latrobe.edu.au
Bobby	Wilson	3/15/2017		SHEP	18587112	18587112@students.latrobe.edu.au
Fletcherbird	Wood	3/16/2017		BUND	18983090	18983090@students.latrobe.edu.au
George	Wright	3/15/2017		BUND	18934022	18934022@students.latrobe.edu.au

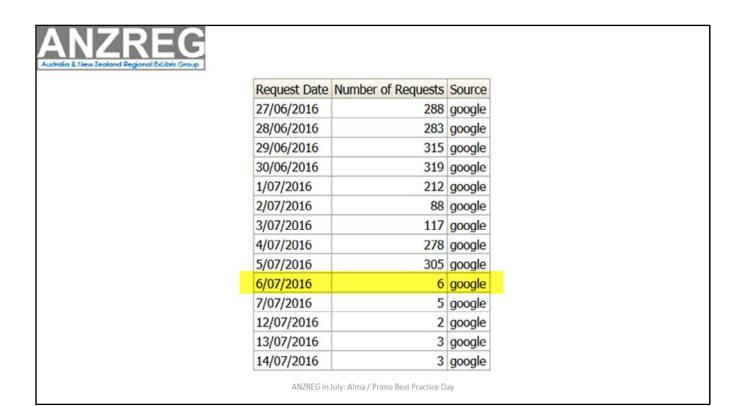
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We came up with an Analytics Report that lets us know all student records that have come across without a User Group.

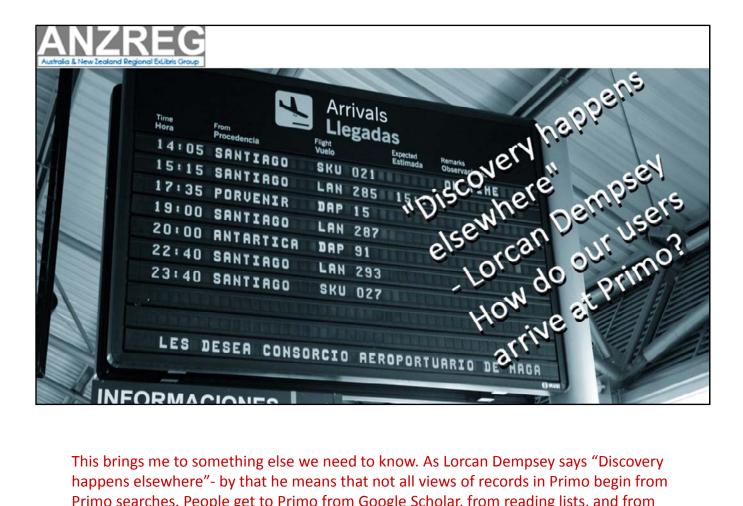
We can use the information that's just in this Analytics report, match it with Outlook distribution lists for the different degree types, and then run a batch update of User Group for these users in Alma.



While I was finishing this presentation, something happened that highlighted how often I use Analytics as a troubleshooting tool. As you may be aware, holdings for Alma libraries are currently not appearing in Google Scholar.



Using Analytics, I was able to create a simple report that let us know exactly what date this began.



This brings me to something else we need to know. As Lorcan Dempsey says "Discovery happens elsewhere"- by that he means that not all views of records in Primo begin from Primo searches. People get to Primo from Google Scholar, from reading lists, and from OpenURL links in databases,

We want to know the numbers and percentages for how are users getting to Primo.



Primo- Where do our users come from?

Over the past month

Source	Number of Requests	% of Total Number of Requests
Google Scholar	5,564	5.3%
OpenURL links from databases	7,645	7.3%
Other external sources such as Talis	1,799	1.7%
Primo searches	89,081	85.6%

Over the past 6 months

Source	Number of Requests	% of Total Number of Requests
Google Scholar	113,986	7.4%
OpenURL links from databases	93,888	6.1%
Other external sources such as Talis	26,374	1.7%
Primo searches	1,296,850	84.7%

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This information informs our

As you can see Google Scholar is quite high, which is why we've made it a priority to keep users up to date with the problems with Google Scholar.

OpenURL links from databases are also quite high, which has influenced our workflows. We now ensure that setting up OpenURL links is part of the standard practice for setting up any electronic resource, no matter how small- and if this isn't a service they offer, we let the vendor know this is something we want.



THE PROBLEM

I'm sure this is a familiar problem to many of the Primo users in this room. The Green dot says Full text available but when you click on View Online, it says No full text available./

Simon Huggard mentioned La Trobe's Usability Study earlier, and this was a pain point for our users. We know users aren't necessarily reporting every time they see this, but it adds to their frustration and negative experience.

The problem is usually caused by poor / incomplete metadata from the Primo Central Index

The problem may also be we have that journal but not that issue.

Finally, it may be due to poor quality metadata from a link in Google Scholar or an OpenURL link.



Top 25 problem articles / book chapters in past month

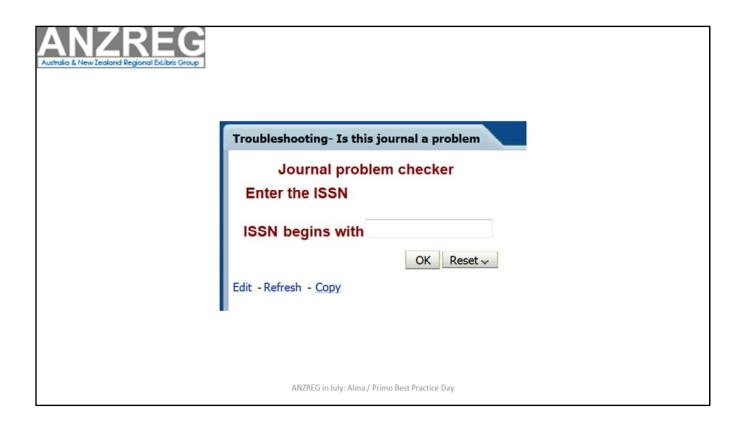
Number of times users received "No full text available" message	Article Title	ISBN	ISSN	Title	Type of Source	Source
72	Are Viruses Alive?		0959-535X;1756-1833	BMJ British medical journal.	PCI record	bmj_journals
45	Planning and writing an evidence- based critical reflection		2041-9457	Journal of paramedic practice: the clinical monthly for emergency care professionals.	PCI record	ma_healthcare
43	An early rehabilitation intervention to enhance recovery during hospital admission for an exacerbation of chronic respiratory disease: randomised controlled trial		0959-535X;1756-1833	BMJ British medical journal.	PCI record	proquest
33	Case Management		0029-6465	The Nursing clinics of North America.	PCI record	sciversesciencedirect_elsevier
32	ATS statement: guidelines for the six- minute walk test.		1073-449X	American journal of respiratory and critical care medicine	PCI record	medline
31	Fall-induced spinal cord injury: External causes and implications for prevention.		1079-0268	Fall-induced spinal cord injury: External causes and implications for prevention.	OpenURL links from databases	EBSCO:CINAHL

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We've set up a monthly report to identify our worst offenders. As well as the bibliographic details, it also lets us know what type of source is responsible- a Primo Central record, or an OpenURL link. Finally, it lists the source of the metadata, so we know who to contact to fix the records.

Over the past me	onth	uvulluble	' in Primo	
Number of times users received "No full text available" message	Article Title	ISBN	ISSN	Title
97	Changing the Way We Talk with Elders: Promoting Health Using the Communication Enhancement Model		0091-4150	The International journal of aging & human development.
44	How cultural differences impact on my consultations		0110-022X	The New Zealand family physician.
40	Powerlessness, empowerment, and health: implications for health promotion programs.		0890-1171	American journal of health promotion AJHP.
36	Model advocates or a model for change%3F The model equal opportunity briefing policy as affirmative action		0025-8938	Melbourne University law review.
32	TRUE LEADERS 2015		0404-2018	The Australian financial review.
30	Love lives at a distance : distance relationships over the lifecourse		1360-7804	Sociological Research

We've set up a separate report just for links from Talis.



Now, the first thing you do when you have an article to troubleshoot is to determine the extent of the problem: is it just that article? Or is it a more widespread problem for that journal? We've put together a handy little widget where you can

ANZREG Australia & New Zealand Regional Extibits Group	
	Troubleshooting- Is this journal a problem
	Journal problem checker
	Enter the ISSN
	ISSN begins with 1474-547X
	OK Reset ~
	Edit - Refresh - Copy
	ANZREG in July: Alma / Primo Best Practice Day

Enter the ISSN



Is this journal a problem?

Below are all the instances of users getting the "No full text available" message for this journal in the past three months.

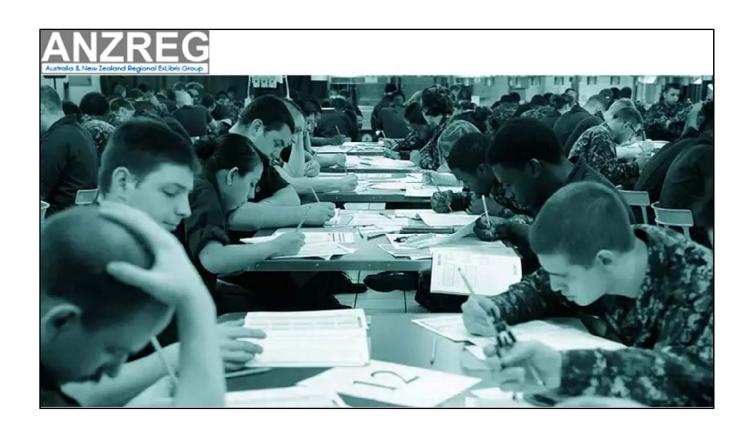
Article Title	No of times record viewed in Primo	% of times someone got "No Full Text Available" message	Title	ISSN
Specialised treatment based on cognitive behaviour therapy versus usual care for tinnitus: a randomised controlled trial.	15	100.00%	The lancet	1474-547X
Training caregivers of disabled patients after stroke.	11	100.00%	The lancet	1474-547X
The art of medicine.	9	100.00%	The lancet	1474-547X
Changing the future of obesity: science, policy, and action.	6	100.00%	The lancet	1474-547X
Child and adolescent obesity: part of a bigger picture.	4	100.00%	The lancet	1474-547X
Adapting to migration as a planetary force.	2	100.00%	The lancet	1474-547X
Addressing the vaccine confidence gap.	2	100.00%	The lancet	1474-547X

And then see how often journal articles have been a problem in this journal.



14 minutes

This journal checker is one example of how else we use Analytics- as a quick and easy tool that any library staff member can use to get the information they need.



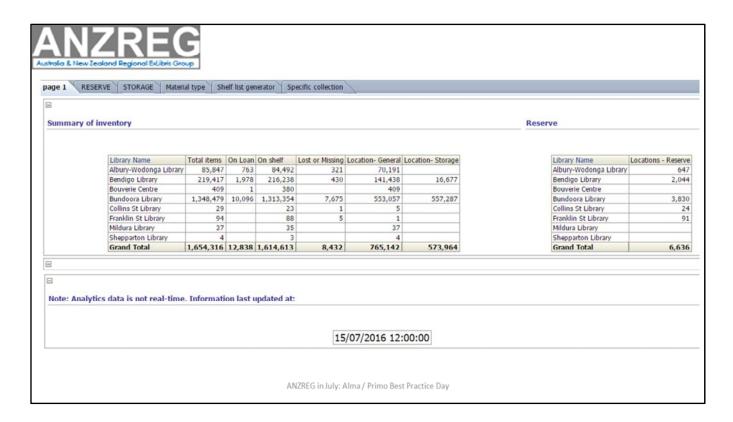
Analytics itself is a difficult program to learn. It's run on the Oracle enterprise system, it's not intuitive, and most of us have learned through a lot of trial and error. The great thing with our tools is that it's easy for our library staff to get their report without having to know anything about Analytics, or without going to an Analytics expert.



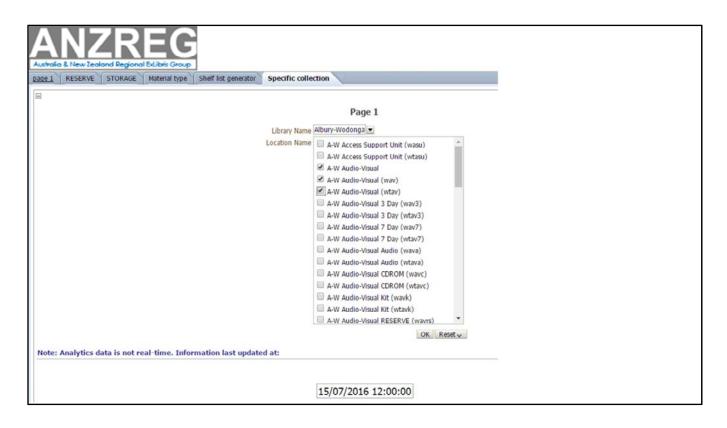
One such person who needs quick and easy access to information is our Collection Manager, who needs to see at a glance what's in particular campuses, collections, and areas.



We've set her up with a link in Alma that takes her to a Dashboard that contains all she needs



She has an overview of everything in the collection.



And if she wants to see a particular collection- any combination of locations and libraries throughout the library- all she needs to do is use the drop-down menu to see what's held.

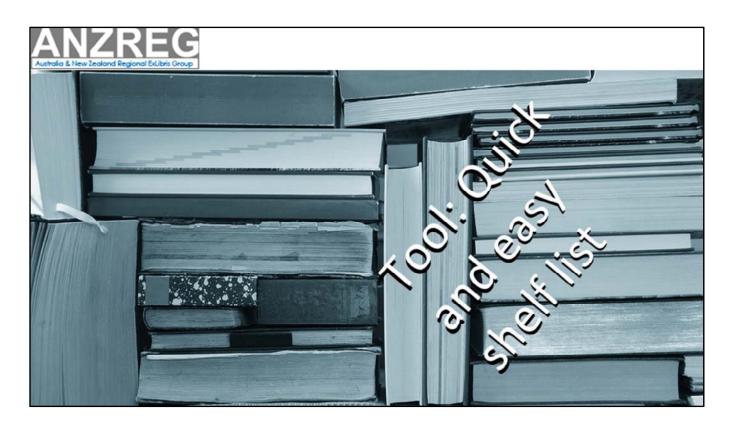


Overview of inventory

Location Name	On Loan	On shelf	Lost or Missing	Reserve items	Storage	General	Total items
A-W Audio-Visual		19				19	19
A-W Audio-Visual (wav)	10	1,450	2			1,462	1,462
A-W Audio-Visual (wtav)	11	1,324	15			1,352	1,352
Grand Total	21	2,793	17			2,833	2,833

Return

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We do a lot of shelf-checks and weeding. Our shelvers need a quick way to generate a shelf list without having to come to me every time.

ANZREG Australia & New Zeoland Regional Edibris Group	
She	elf Report Generator (Beta)
Select your location(s) the	n your Dewey Decimal Range.
Library Name	-Select Value ▼
	-Select Value ▼
Permanent Call Number E	Between -
Refresh	OK Reset ~
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Easy, pick library, then location, enter call no then print!



610 C678h

610 C684i

610 C758

610 C767i

610 CHI:T

610 COM:F:3

610 COM:G

610 C73773

32934022759049

32934965250089

32934024435341

32934021876117

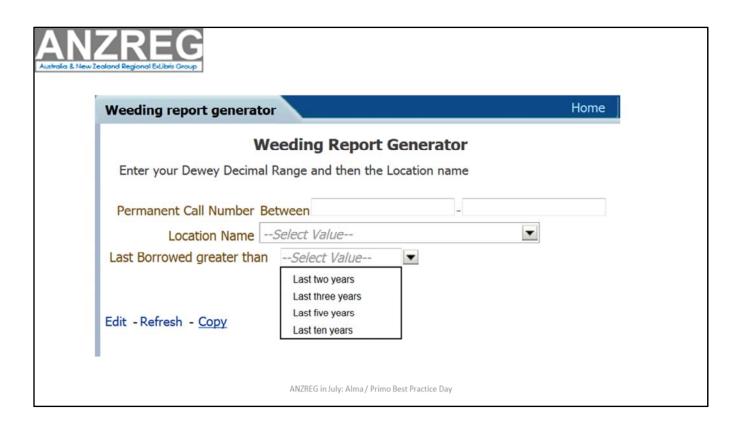
32934023206651

32934012590842

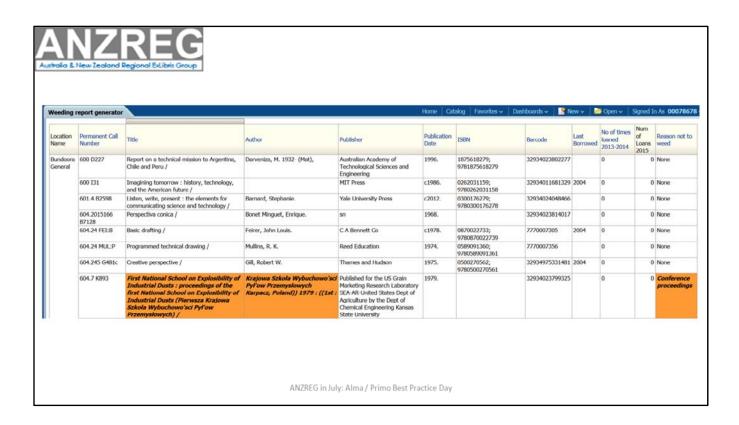
32934023532999

32934011980168

Easy, pick library, then location, enter call no then print!



In a similar vein, we have a Weeding Report Generator. Just choose your Llocation, the call number range, and your weeding criteria.



The report gives you a list of potential titles to weed. It lists the bibliographic details you need, when it was last borrowed, and any reason you might not want to weed it-for instance, it's a conference proceeding.



16 minutes

Acknowledge Chris Jones Sheffield University

Report shows us all items with 3 or more active requests. Tells us everything we need to know- how many are on order, are missing, how many are held at different campuses, and what pickup locations are being chosen.



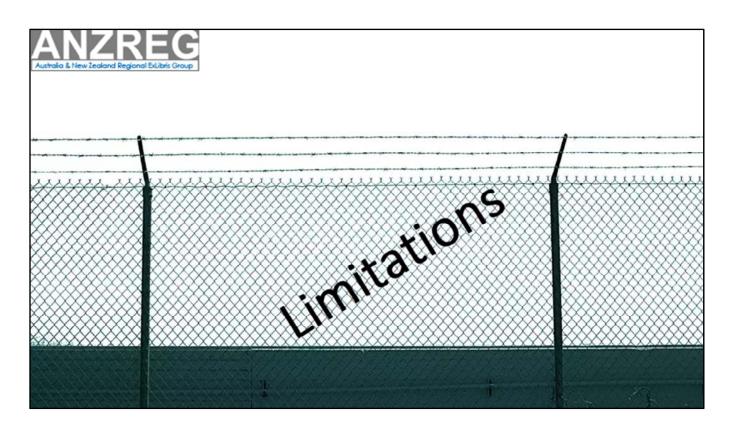
Title

LTU High Requests - New look

Table

MMS Id	Title	Author	Edition	ISBN	Pub Date	Items in Ref		On Loan	Missing	A-W	BUN	BEN	CITY- C	CITY- F	MIL	SHEP	TOTAL ITEMS	Active Requests	Active requests- A-W	Active Requests- Ben	Active Requests- Bun	Active Requests Shep
99125616502146	Viage de Espana /	Ponz, Antonio, 1725- 1792.			1972.			1			18						18	3				
99416906302146	Animal law in Australia /	Cao, Deborah, 1962- author.		9780455235769; 0455235767	2015.		3	2			5	2					7	3			3	
	Game of thrones : the complete first season			9780780676701; 078067670X	c2012.						1						1	4			4	
9983490202146	Fundamentals of fixed prosthodontics		Fourth edition.	0867154756; 9780867154757	c2012.							1					1	5		5		

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Limits / Future Directions

As useful as Analytics has been to our library, I have to admit there are limits and areas of improvement.



Limits / Future Directions

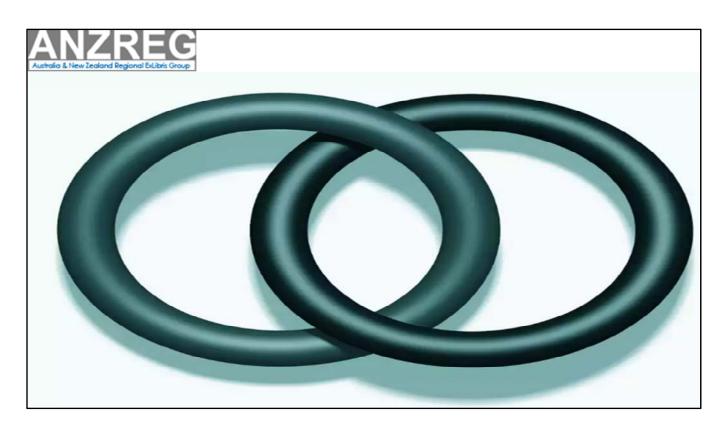
The biggest for me is real time availability. Data in Analytics is only updated once a day. This is especially problematic for areas such as circulation, where information changes very regularly.

I know Real Time Availability is a pipe dream, but it would be great to have it refreshed even every six hours.



Limits / Future Directions

Unable to get past event data- e.g. all items in reserve for semester 2 last year



Limits / Future Directions

Better linking of subject areas e.g. For Fulfilment can't include items with 0 loans, e.g. so can't get list of loans from certain date. Can't link borrowing information and funds in Acquisitions.



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