



## **ELUNA learns Alma Analytics Session Q & A**

### **What has the response to the visualizations been by selectors?**

Bridgett Bonar: It response I have gotten has been positive, but this is the type of thing were if it is working well, I often don't hear anything!

### **What are your next areas of focus?**

Bridgett Bonar: I have been taking a look at a more functional cost per use visualization, but this will probably have to take place outside of analytics.

### **Are you also using any tools outside of Alma for other acq analysis? Like greenglass, etc?**

Bridgett Bonar: Greenglass and other programs like UnSub are being looked at in other areas of my institution, but I haven't worked with them yet. I have been working with other visualization software like Tableau as well.

### **You mentioned weighing the limitations of Alma analytics and I noticed the all blue color in one your visualizations. Has accessibility been an issue mentioned by your selectors?**

Bridgett Bonar: Yes, I do have a user for some of my dashboards that I know is colorblind, (And I should go back and adjust the setting on this one). However, it is easy to let that sort of thing fall by the wayside (as I sometimes do as well!) so I like to highlight it when I can.

### **Did you have to encourage your selectors to use Alma to see the reports?**

Bridgett Bonar: Not often. But much of what I create is by request and optional for use, so I've never put much effort into encouraging use. Additionally, the recent (I think a year ago now?) update to Alma with the analytics objects has made it much easier to put things where they are easily findable, which I think helps.

### **Do you have any examples of the use of this with fields that are indexed for discovery? I can usually make a better case for clean up if associated with user needs like that.**

Kathryn Lybarger: To improve how things look in discovery, I suggest looking at some of the "Bibliographic" analyses. For example, "Character Encoding" can catch examples where foreign language records have been loaded correctly, and they can be unreadable in discovery. "Short Records" and "Title Starting Caps" can be good to find brief records that don't have enough information to be useful for discovery (and may need to be merged with a full record already in the catalog).

**If someone has experience with analysis but is not a cataloger, where do you suggest they focus for print - call numbers, barcode, etc.?**

Kathryn Lybarger: I suggest looking at recent analyses you have done and considering what you are assuming is there -- are you breaking up the results by language? by call number? What if things fall outside those categories -- do they still fit into those reports usefully or do they become "other"? Those might be good issues to address, working with your catalogers if needed.

**How can we get in touch with you if we have questions later?**

Bridgett Bonar: You can reach out to me at [bridgett.e.bonar@dartmouth.edu](mailto:bridgett.e.bonar@dartmouth.edu). I am happy to connect with other people doing this kind of work!

**Hmm, the URL worked for me. Maybe try a different browser?**

Kathryn Lybarger: It should work! Here's that URL: <https://ift.zemkat.org/>

**Not really a question, but thanks for bringing up the phrase 'Technical Debt'. I never thought about this from the perspectives you presented on. These ideas are important to consider. Thanks.**

Kathryn Lybarger: You're welcome! :) I come from a programming background, and I regularly notice how many issues with cataloging are similar.

**Anne, as you said, this is time intensive work. What percentage of your time each week would you say is spent on this each week? And can you speak to the need/value of communication and collaboration with stakeholders within the library in determining what you are trying to achieve with your report generation and analysis?**

Anne Larrivee: It's hard to say, but one project can take one full workday.

**I like your learning circle idea. Do you have a curriculum?**

Anne Larrivee: With the learning groups we usually just based it off of the canned Alma reports. We will walk through the relevance of the report and suggestions for changes. Sometimes people would share their own reports or lessons learned.

**Can you use bins for patron types too?**

Anne Larrivee: Bins can be used to rename anything with a standardized name grouping.

**Have you had to do a lot of data cleanup before your reports would work for you? If so, what areas did you need to focus on?**

Anne Larrivee: Data cleanup is always a need, but it depends on what type of report is being run and sometimes I run the report and do more data cleanup within Excel. For example, if I'm creating a weeding report many librarians would like to filter based on publication date but the date structure can vary. I will use the Excel Replace function to remove certain symbols, etc.

**With the COUNTER reports do you retrieve them (SUSHI) through Alma? Or some other system?**

Anne Larrivee: SUSHI makes it easier to ingest COUNTER reports into Alma. If SUSHI is not available manual uploads of COUNTER reports is also an option. It's nice to have them integrated into Alma so the

data can be integrated into Analytics reporting. It's problematic to include non-COUNTER data-- if libraries really feel strongly, they may be able to manipulate non-COUNTER reports and format them similar to a COUNTER structure-- this might make it ingestible into Alma but this would require a lot of work and careful formatting.

**For someone just getting started in Alma and analytics, what resources do you suggest? Perhaps keeping in mind someone who is overwhelmed by the amount of possibilities available.**

Anne Larrivee: Yoel Kortek saves a lot of his presentations on the Alma Analytics documentation site and sometimes you can locate previous ELUNA presentations that include a lot of helpful tips. The best way to learn Analytics is to start building reports and reviewing canned reports to figure out what filters are most useful. I've also looked at reports included in the community folder. For even more experience- Oracle has created Analytics guides for how to use their software- this could be useful for more advanced coding

**For usage dashboard, will you plan to use counter reports in some ways?**

Anne Larrivee: For the usage dashboard that was included in my presentation, yes, I use COUNTER reports.

**Our biggest issue is journal holdings data. Can analytics help locate?**

Kathryn Lybarger: Yes! This will depend on your setup, but one place I have done a lot of cleanups is "Summary Holdings" as we have used that data with projects like greenglass. You can also get to all that great item data (enum, chron, description) to clean up inventory. For example, are there items on journals where the enum/chron/description is blank? Might be good to see what that issue actually is.

**I just looked at <https://1ft.zemkat.org/> and there is no information, only a photo.**

Kathryn Lybarger: <https://1ft.zemkat.org>

**Where is the Looking for Trouble folder?**

Kathryn Lybarger: Shared Folders / Community / Reports / Institutions / University of Kentucky / Looking for Trouble

**Could you please show the file path in analytics again?**

Bridgett Bonar: Shared folders/Community/Reports/Institutions/Dartmouth College/Rialto Orders Usage

**Can you drop your website into the chat?**

Kathryn Lybarger: <https://1ft.zemkat.org>