

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Turning Data into Insight

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Cross Product Team



Agenda

- Library Analytics: Expanding On All Fronts
- Analytics New layout
- Data Visualization
- Turning Data into Insight
- Collection Development Initiative
- DARA - Smart Recommendation

Library Analytics Expanding On All Fronts

Collect

From siloed analytics to a “Library Analytics Solution”!

Explore

Report. Share. Schedule.

Insight

Out-of-the-box insight dashboards

Action

From Insight to Action. DARA and more.



Focusing on the "Collection Development Initiative" as a case study

New Analytics User Interface in Alma

Explore

Analytics New User Interface rollout phases

- 1 Launched in February 2023 as "Opt-in"
- 2 Shifted in August 2023 as "Opt-out"
- 3 Full integration by November 2023

New Analytics User Interface in Alma

Report. Share. Schedule.

Explore

The screenshot shows the Alma Analytics interface with four callouts highlighting key features:

- 1 Filter Options:** A callout points to the top navigation bar where filters for 'Type: Data Visualization Workbook', 'Source System: All', 'Badges: All', and 'Subject Area: All' are visible.
- 2 Flexible Scheduling:** A callout points to the 'Schedule' section, which includes a toggle for 'Schedule Report' and a 'Recurrence Pattern Weekly' set to 'Every 3 week(s) on Tuesday At 09:00'.
- 3 Deep Link:** A callout points to a 'Report URL (2)' field containing a long alphanumeric string, indicating a unique link for each report.
- 4 Preview in Alma:** A callout points to a horizontal bar chart titled 'Num of Titles (All) by Group1', showing data for various subject areas like 'Commerces', 'English literature', and 'History of Asia'.

New Analytics User Interface in Alma

Data Visualization on Homepage

Explore

The screenshot displays the Alma Analytics homepage. The main content area features a donut chart with the following data:

Category	Percentage
Num of Titles with Physical Items (Active)	84.97%
Num of Titles with Electronic Portfolios (Active)	14.97%
Num of Titles with Digital Representations (Active)	0.06%

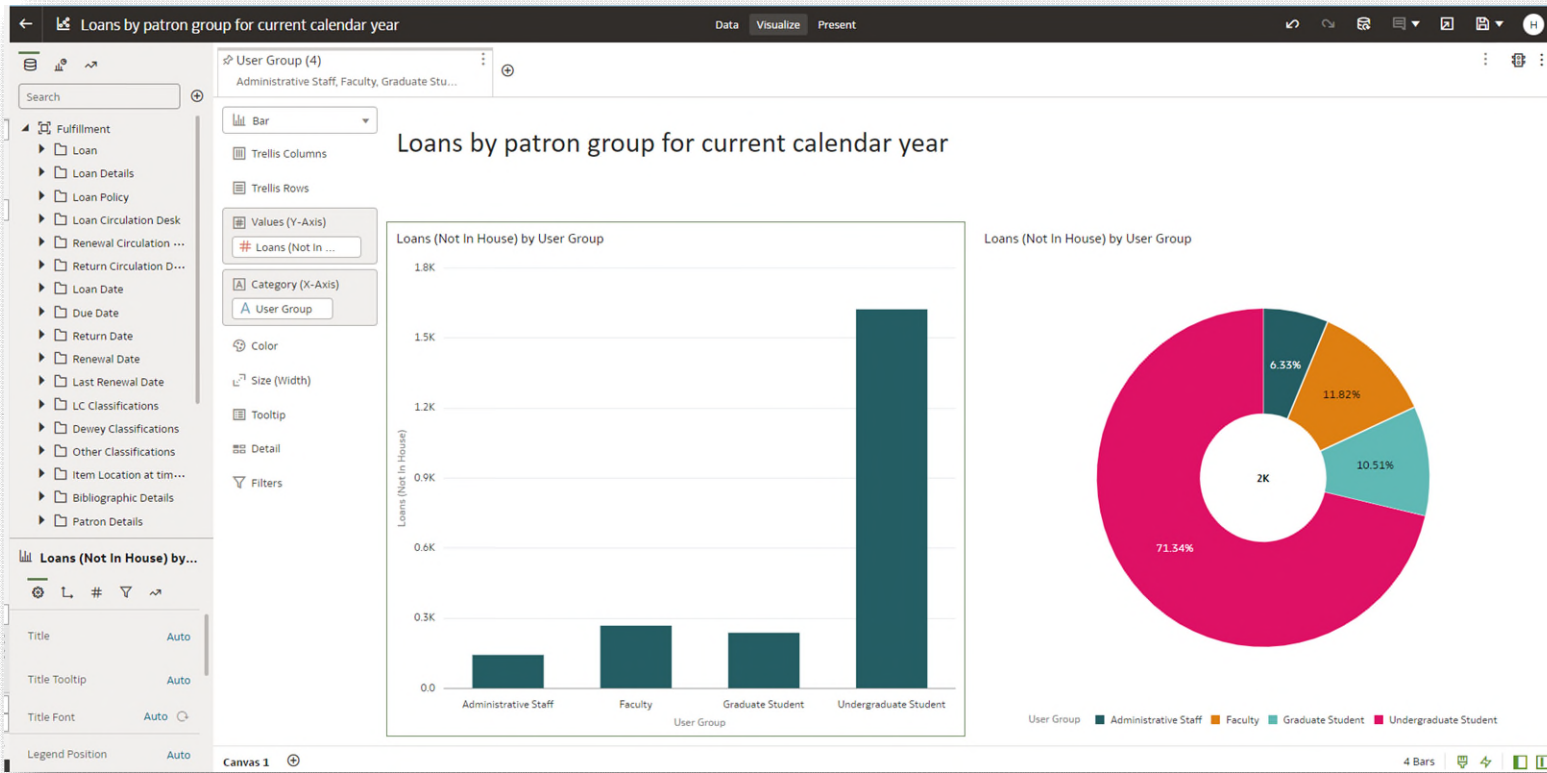
The total number of titles is 365K. A table below the chart provides further details:

Num of Titles with Physical Items (Active)	Num of Titles with Electronic Portfolios (Active)	Num of Titles with Digital Representations (Active)
54,589.00	309,747.00	206.00

An inset window titled "Report Preview" is shown on the right, containing a "Schedule Report" toggle and an "Add as dashboard" button. The "Add as dashboard" button is highlighted with a purple box.

The left sidebar shows the "My Homepage" menu with a search bar and a list of items including "Inventory breakdown", "Loans by patron group for current calendar year", "Monitor Jobs", "Configure Views", "Search Profiles", "Access Analytics", and "Access Data Visualization".

Data Visualization: from Data to Insight



1

Simple and intuitive user interface

2

Immediate preview

3

Actionable data

4

Dynamic - drill down options

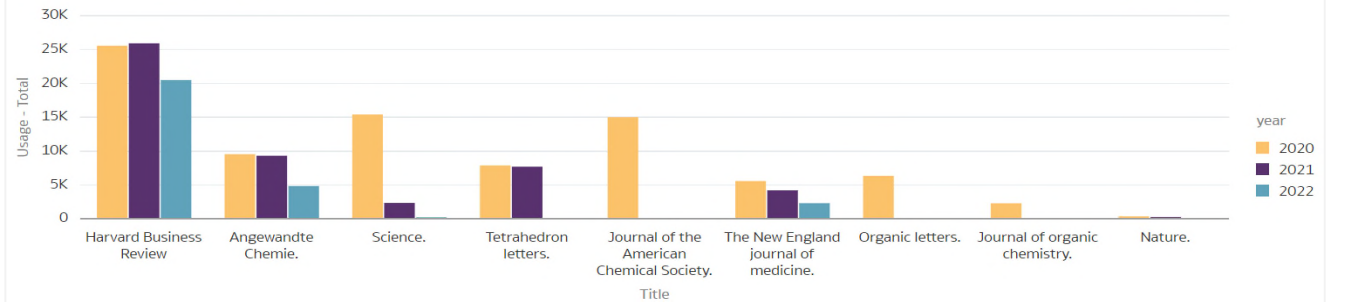
Data Visualization: from Data to Insight

Classifications **Electronic collections** Available Electronic Resources Newly activated portfolios and collection»

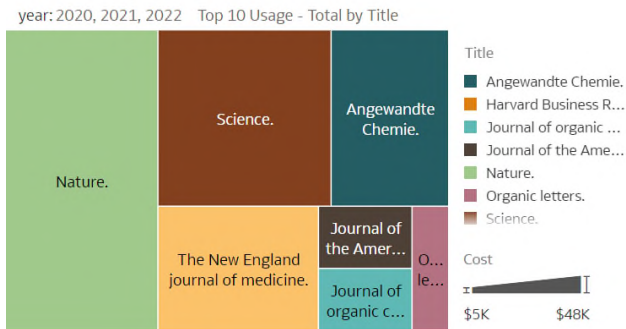
Electronic collections - drill down to Portfolio

Electronic Collection Public Name	Electronic Collection Id	Electronic Collection Creator	Electronic Collection Activation Date	No. of Portfolio (In Repository)
Alexander Street Digital Karl Barth Library	61286041850001891	paula.hasler		96
Philosopher's Index	61188047790001891	sonya.maclairin	11/21/2014	0
World Religion Database	61352508510001891	melanie.lewis	10/25/2022	0
17th-18th century Burney Collection newspapers	61162398140001891	P2E_JOB	2/13/2014	0
19th century British Library newspapers	61163211450001891	P2E_JOB		0
2022 Brill Biology Journal Collection	61328564360001891	melanie.lewis	2/16/2022	16
2022 Brill Religious Studies Journal Collection	61328564390001891	melanie.lewis	2/16/2022	57
A+ education	61163211330001891	P2E_JOB		0
AASD Australian art sales digest.	61163158970001891	P2E_JOB		0
ABC-CLIO eBooks	61277481730001891	System		0
ABI/INFORM Collection	61277477240001891	System		0
ABI/INFORM Dateline	61277477320001891	System		0
ABI/INFORM Global	61277480910001891	System		0
ABI/INFORM Trade & Industry	61277480880001891	System		0
ABI/INFORM complete	61163158930001891	P2E_JOB		0
ACCESSSS	61258801620001891	louisa.fisher	7/2/2019	0
ACLS Humanities eBook	61277476890001891	System		0
ACM Digital Library Complete	61262337860001891	System	9/11/2019	12,041
	61262567670001891	System	9/11/2019	12,041
ACM portal the ACM Digital Library.	61156159790001891	P2E_JOB	12/5/2013	0

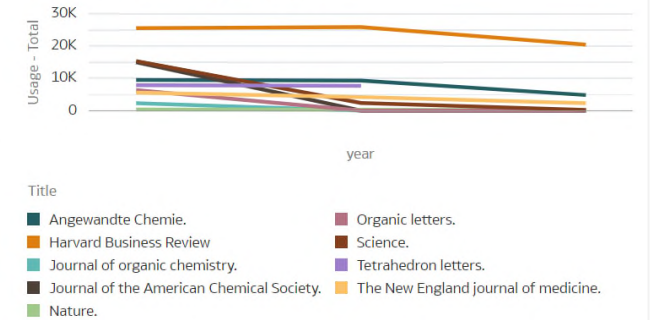
Top 10 Journal Usage 3 Years



Top 10 Journal Cost 3 Years



Top 10 Journal Usage 3 Years



**Creating out-of-the-box
Data Visualization workbooks in
cooperation with the community
to support data-driven workflows**



Collection Development Initiative

Collection Development: Use Cases



Last Copy



E-Resource Renewals



Collection Development by Subject

Collection Development: from Insight to Action



Focus Group

Institution and consortia:

Launch: June 2023



Insight Dashboards

Insightful dashboards

**First deliverables:
End of 2023***



Next Phase: Actions in Alma

DARA recommendations
Cross Product Opportunities

**First deliverables
2024 H2***

*Subject to change

Books Retention and Weeding Dashboard

Insight

Scope

Institutions

Consortia

Shared Print

Dashboard Scope: Include & Exclude

Filters

Scope: Consortia- All/selected institutions
Single Institution

Subject: All / Selected (Dewey, LC, Subject 6XX)

Publication Year: All/ select <> In a specific vtz or main filter

Number of copies: <> In a specific vtz or main filter

Number of loans: <> In a specific vtz or main filter

Should weeding and "Retention" be in the same report or separate reports

Book Retention Dashboard
Institute Name | September 9, 2023

Summary

General:
1. What is my print status?

Total Print Books
2,473,193

NUM TITLES BY FORMAT

Retention:
1. What's in retention
2. What is not but should be?

Items Marked for Retention
5,473

Last Copies not Marked for Retention
1,709

Weeding:
1. What do we have too much of?
2. What has hardly any usage?

Titles with no Circulation in Past 5 Years and no retention
8,294

Titles with Possible P and E Overlap by ISBN
250

Additional Metrics

Retention:

Last copies by Institutions/ libraries

Titles by number of copies with no retention plan- Consortia

Copy Count	Count
1 copy	22
2 copy	18
3-5 copies	12
5-10 copies	88
10+	87

Titles: by number of copies with no retention plan by LC- Consortia

Last Copies
Titles with less than X copies

Category	Percentage
Marked for Retention	30%
Not Marked for Retention	70%

Dashboard Scope: Include & Exclude

Retention: Business Questions

Retention: Insights to Actions

Weeding: Business Questions

Weeding: Insights to Actions

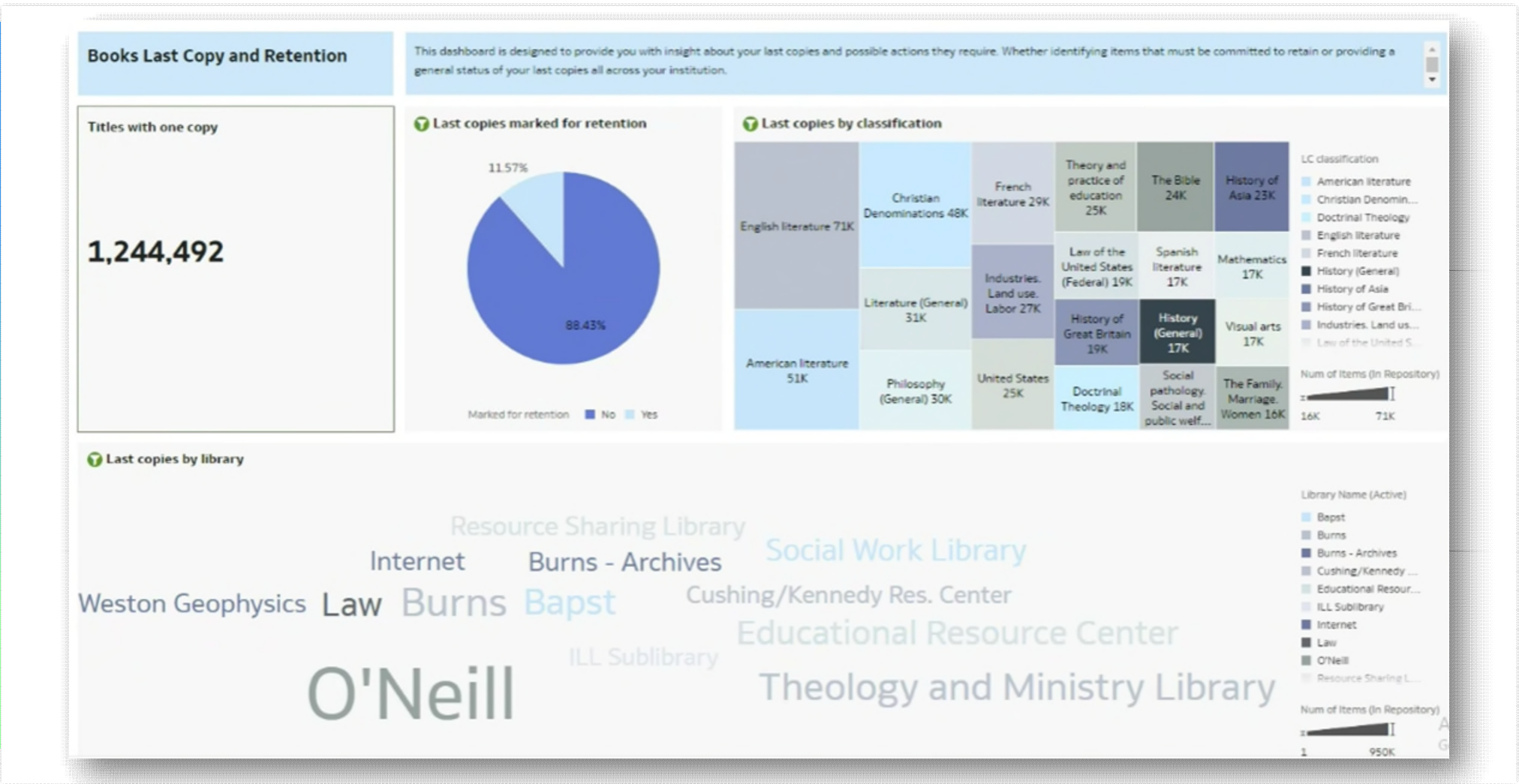
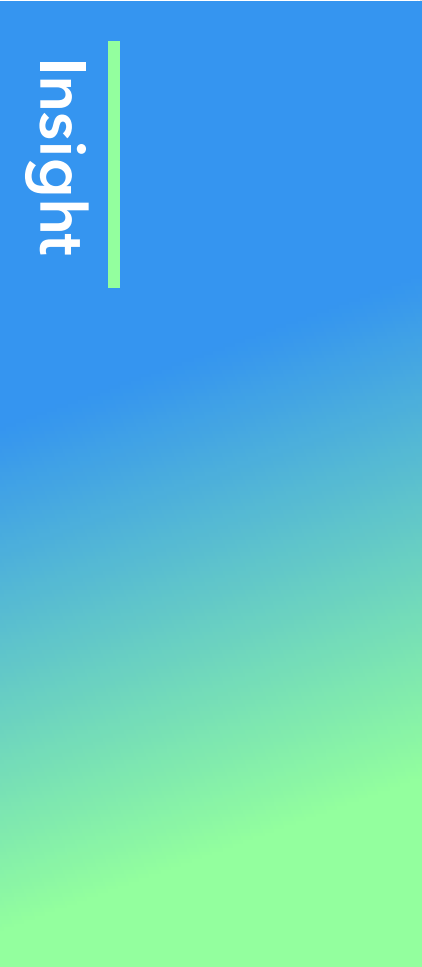
*Subject to change

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First Dashboard Reviewed By The Focus Group: Books: Institutional level



*Subject to change

Collection Development Insight Dashboards

So, what's next?

Insight

Books (2024)

Last Copy (institution)

Shared Print (institution, consortia)

E-Resource Renewal (institution, consortia)

DEI Dashboard (institution, consortia)

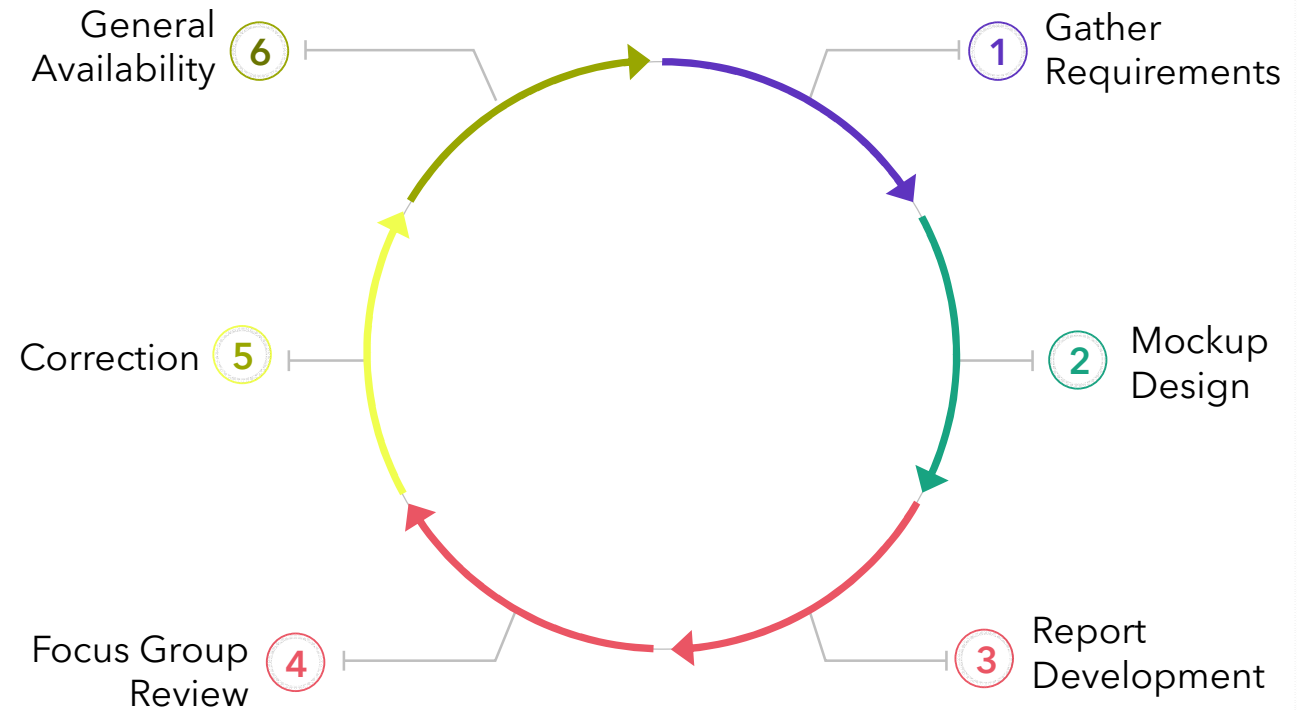
Serials (2024 - 2025)

Last Copy (institution, consortia)

Shared Print (institution, consortia)

E-Resource Renewal (institution, consortia)

DEI Dashboard (institution, consortia)



*Subject to change



DARA

Data Analysis
Recommendation
Assistant



DARA Today

○ Rules based AI

○ 22 recommendations collaborated with a dedicated focus group

The screenshot displays the 'Manage Recommendations' page. At the top, there is a 'Back' button and a 'DARA' logo. Below the header, it shows '1 - 20 of 71' items and '0 rows selected'. There are filters for 'Select All', 'Category: All', 'Status: Active', 'Library: All', and 'Assign to: All'. The main content area lists three recommendations:

- 1 High Request Load for "How to win friends and influence people / Dale Carnegie." title**
Category: High Request Load
Created on: 02/02/2020
Updated on: 02/02/2020
Updated by: System
Notes: 0
Attachments: 0
Description: Multiple patron physical requests were placed on How to win friends and influence people / Dale Carnegie.. The time until an item became available was relatively long.
Number of orders (last year): 1, Number of requests (last year): 9, Number of items: 3, Average number of days to available: 5
Recommendation: I recommend reviewing the title to potentially reduce patron waiting time: you may want to modify terms of use, move items to a short loan location or purchase additional copies.
- 2 Load usage data from Newsbank vendor**
Category: Load Usage Data
Created on: 03/04/2019
Updated on: 01/29/2020
Updated by: exl_impl
Notes: 0
Attachments: 0
Description: Your institution activated 1 collections from Newsbank, which is an Alma Certified SUSHI vendor.
Recommendation: I recommend harvesting usage data from this vendor. Other institutions successfully harvested usage data from this vendor.
- 3 Automatically harvest usage data from EBSCO Host (EBSCOHost) (https) vendor**
Category: Automatic Usage Data
Created on: 03/04/2019
Updated on: 01/29/2020
Updated by: exl_impl
Notes: 0
Attachments: 0
Description: Your institution uploaded 17 manual CCOUNTER file(s) with platform(s): ebSCOhost
Report Type: BR1, Release: R4
Recommendation: I recommend SUSHI harvesting with EBSCO Host (EBSCOHost) (https) instead of manual file uploads. Other institutions successfully harvested usage data from this vendor.

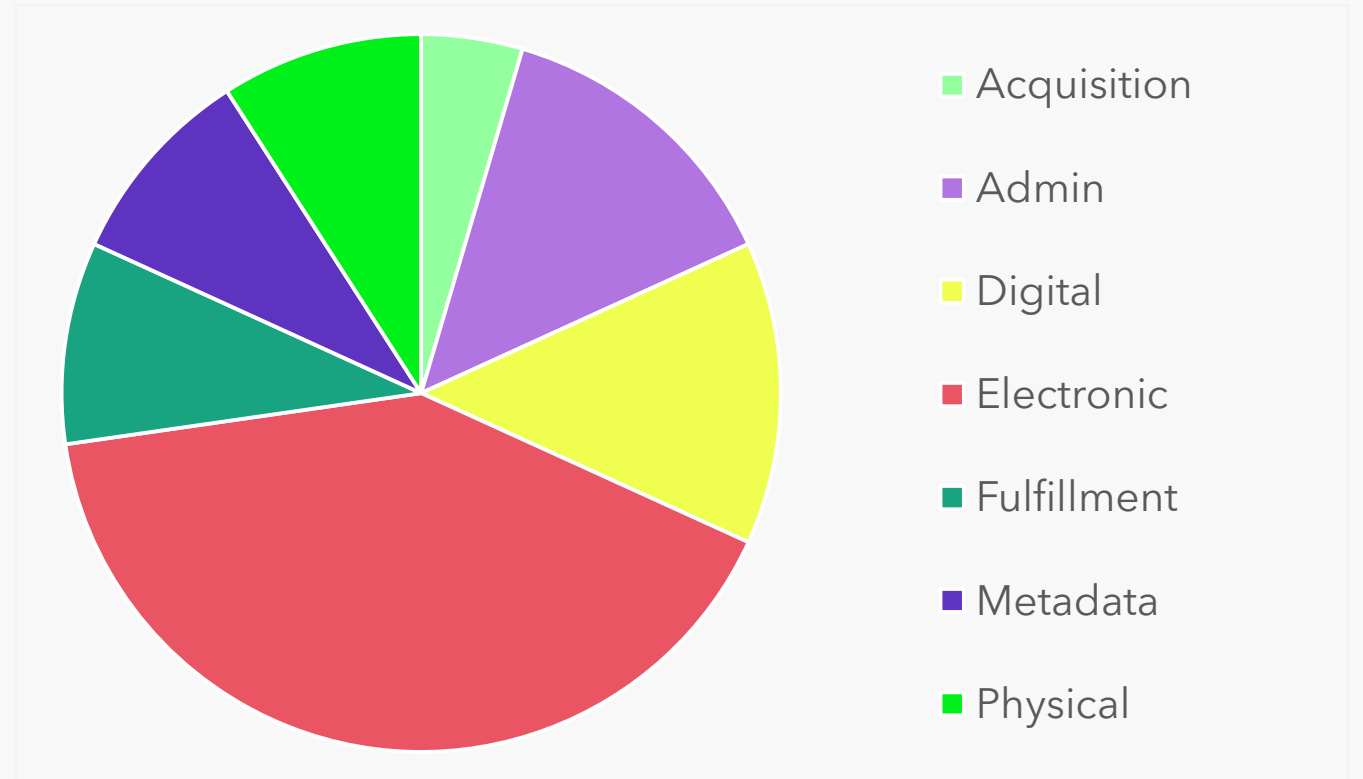
DARA Today

Last Year Usage Statistics

○ Recommendations: **128,263**

○ **35%** of them were implemented

○ **~91%** of institutions implemented recommendations



Library Analytics Expanding On All Fronts

Collect

Expanding Analytics scope: internally and externally!

Explore

More integrated and more powerful interface

Insight

Starting with out-of-the-box DV based dashboards

Action

DARA. Additional data-based recommendations as a start

Takeaways



More integration



From insightful visualization to smart action



The first step: collection development



Thank You!

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