



# ERM-302: Analytics of E-Resources

## Exercises for Attendees

Note: These exercises will not work in your sandbox; you can use your production environment.

### Exercise 1: View the Default ERM Dashboards

1. In Alma, select the **Analytics** menu, and choose **Design Analytics**
2. In upper-right corner, select **Catalog**
3. Expand folder **Shared Folders / Alma / E-Inventory**
4. Select **Dashboards**
5. On "E-Inventory" dashboard, select **Open**
6. View content of the **Classifications** report
7. Select tab with the report **Electronic Collections** and view content there.
8. Select one of the collections (one that has at least a few portfolios) to view the Portfolio List
9. Sort by **Title**
10. Click **Return** (at bottom of report)
11. On E-Inventory dashboard, select tab with the report **Available Electronic Resources** and view content there
12. Select tab with the report **Newly activated portfolios and collections** and view content there
13. Change **Portfolio Activation Date** to one month ago and then click **Apply**
14. In upper-right corner, select **Catalog**
15. Expand folder **Shared Folders / Alma / Usage via Alma Link Resolver**
16. Select **Dashboards** folder
17. On dashboard "Usage via Alma Link Resolver," select **Open**
18. Select tab with the report **Resolver statistics by source** and view content there
19. Select **Catalog**
20. Expand folder **Shared Folders / Alma / Cost per use via COUNTER reports e-inventory and acquisitions data**
21. Select folder **Dashboards**
22. On "Electronic Cost Usage Dashboard", select **Open**

23. Change prompt **Fiscal Period Description** as needed to see desired data, and click **Apply**
24. Select tab with the report **Title Details**
25. Enter some title-search words in the **Title** prompt field, choose a **Fiscal Period**, and choose remaining settings, then click **OK**
26. At the bottom of the page, click **Electronic Cost Usage Dashboard: Title Details** to return to the previous screen.
27. Select other reports (tabs) as desired

## Exercise 2: View the Default ERM Reports

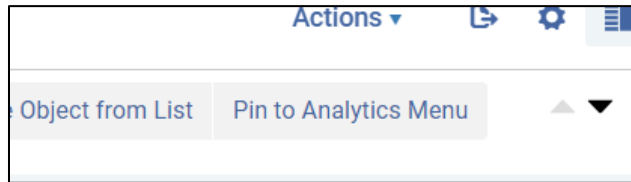
1. In Alma's Design Analytics (Oracle Analytics), in the upper-right corner, select **Catalog**
2. Expand folder **Shared Folders / Alma / Usage via COUNTER reports - Release 5**
3. Select folder **Reports**
4. On report "Trends by Month," select **Open** and view the data.
5. Select **Catalog**
6. On report "COUNTER Report SUSHI Harvesting Analysis ..." select **Edit** and view the data
7. Switch to the **Criteria** tab
8. Add a data column, such as Load File > Load File COUNTER Release
9. Select **Catalog**
10. Expand folder **Shared Folders / Alma / E-Inventory**
11. Select **Reports**
12. On report "Electronic Inventory Count," select **Open** and view the data
13. Select **Catalog**
14. On report "Portfolio List," select **Open** and view the data
15. Scroll to the bottom of the page and select **v (Next 1000 Rows)**.
16. Select **Catalog**
17. In folder "Usage via Alma Link Resolver," select **Reports**
18. On report "2. Top Ten title accesses via Open URL requests without services in the previous year," select **Open** and view data
19. Select **Catalog**
20. On report "2. Top Ten title accesses via Open URL requests without services in the previous year," select **More > Copy**
21. Collapse the Alma shared folder.
22. Open **[folder for your institution]**
23. Select a subfolder, or create a new subfolder, within your institution folder.
24. In the lower-left corner, select **Task > Paste**
25. On the (pasted) report "2. Top Ten title accesses for Open URL requests ...," select **Edit**.
26. Select **Criteria** tab
27. Modify report columns and filters as desired.

## Exercise 3: Create a New Report

1. In Alma Design Analytics (Oracle Analytics), on the top-right menu, select **Create > Analysis**
2. Select subject area **E-Inventory**
3. In Subject Area folder on the left side, open folder "Electronic Collection," and drag **Electronic Collection Public Name** into Selected Columns field
4. Open folder Bibliographic Details and drag **Title (Normalized)** into Selected Columns field
5. Open folder Cost Usage and hover cursor over **Cost Usage Instructions** to read the instructions
6. Open folder **Cost Usage Measures**
7. Double-click the following measures (to add them to the Selected Columns field):
  - a. **Cost**
  - b. **Usage- Total**
  - c. **Cost Per Use**
8. In the Selected Columns field, hover over the Cost measure and select **Filter**
9. Create a New Filter where the Cost **is greater than 0**
10. Click **OK** on the new filter
11. Similarly, create a filter so that **Usage Total is greater than 0**
12. In the upper-right corner, save the report
13. Select the **Results** tab and view the new report
14. Modify Criteria (columns and filters) as needed to present the data you want.

## Exercise 4: Share Overlap Report: Print to Electronic

1. In Alma Analytics, on the top-right menu, select **Catalog**
2. Go to folder **Shared Folders > Alma > Titles > Reports**
3. On report Overlap P and E, select **More > Copy**
4. Open **[folder for your institution]**
5. Select a subfolder, or create a new subfolder, within your institution folder
6. In the lower-left corner, select **Task > Paste**
7. On the newly added report Overlap P and E, select **Open**
8. Enter and select choices for the various prompts
9. Click **OK**
10. View the results in the Overlap P and E report.
11. Back in Alma, select menu **Analytics > My Analytics > Analytics Objects List**
12. Select **Actions > Add New Alma Analytics Object**
13. For Analytic Folder, find the **folder** where you stored the "Overlap P and E" report
14. For Report Name, find the **Overlap P and E** report
15. Change Display Name if desired; maybe something like **Overlap of Print and Electronic Inventory**
16. Click **Save**
17. When the Object opens, in the **Roles** section, add roles for Alma users that you want to have access to this report, either by **Add Role** or **Add From Profiles**. (It's helpful to make sure to pick a role you have!)
18. At the top of the Object editor, click **Pin to Analytics Menu**



19. On menu **Analytics**, in the Pinned Objects section, select report **Overlap of Print and Electronic Inventory** (or whatever you named it)

Congratulations, you have completed the exercises for this session!