

# Reports & Analytics SIG

## Meeting

### Date & Time

Friday, October 30, 2020  
2:00 PM - 4:00 PM

### Location

Video conference call via Zoom

### Attendees

<b>OLS</b>	Kevin Collins, Roland Samieske, Polly Thistlethwaite, Allie Verbovetskaya ( <i>chair</i> )	<b>HO</b>	Madeline Ford, Rhonda Johnson, Amam Ogunka
<b>BB</b>	Kimmy Szeto	<b>JJ</b>	
<b>BC</b>	Michael Hughes, Mary Mallery	<b>KB</b>	Mark Eaton
<b>BM</b>	Rebecca Hyams	<b>LE</b>	Stephen Walker
<b>BX</b>	Michael Miller, Nelson Santana	<b>LG</b>	Elziabeth Jardine
<b>CC</b>	Sean O'Heir	<b>ME</b>	
<b>CL</b>		<b>NC</b>	
<b>GC</b>	Adriana Palmer, Stephen Zweibel	<b>NY</b>	Nanette Johnson, Maura Smale
<b>GJ</b>		<b>QB</b>	Jeffrey Jia, Vikki Terrile
<b>HC</b>	Ilan Zelazny	<b>QC</b>	Keith Eng, Robin Naughton, Sonali Sugrim, Simone Yearwood, Joan Xu
		<b>SI</b>	
		<b>YC</b>	Junli Diao

### Minutes

#### Introductions

Allie welcomed everyone to the inaugural meeting of the Reports & Analytics Special Interest Group. Attendees were encouraged to introduce themselves in the Zoom chat and add campus designators to their names in Zoom.

## *Approval of agenda*

Agenda approved without amendments.

## *Announcements*

### Co-chair Election

Allie noted that the committee is led by two chairs: a representative from the CUNY Office of Library Services and a committee member from a campus library, a position that is elected on an annual basis (with former chairs eligible to run for re-election). Volunteers were sought and Simone volunteered to be co-chair if there were no other volunteers. Adriana also expressed interest in co-chairing if she was one of three committee leaders. An election was not held and Allie will follow up with Simone and Adriana about next steps.

### Local Documentation

There is a "Reports" sub-page in the Alma section on the OLS Support Site: <https://ols-support.cuny.edu/systems/alma/reports> Some basic information about Alma Analytics is already available there, including how to access the reports as well as edit existing reports.

### Oracle Upgrade

Oracle BI, which powers Alma Analytics, is in the middle of an upgrade. An alert pops up in Alma that indicates that reports saved to "My Folders" need to be moved this weekend or they will be lost:

ACTION REQUIRED! This message is relevant only for users who have created Analytics reports in the "My Folders" directory. The OBI to OAS and DV Upgrade on the Ex Libris Higher Education Platform is coming soon. The report freeze on your instance is scheduled for 11/01/2020 02:00:00 EST. As part of this upgrade reports in the "My Folders" directory will be lost unless you take action! If you wish to migrate reports in the "My Folders" directory, then please copy the reports to your institution folder before the above "Freeze" date. For instructions on copying the "My Folders" reports to your institution folder see Ensuring Reports are Migrated 

More information:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/010Introduction/The\\_Basics\\_of\\_Working\\_with\\_Analytics/OAS\\_\(Oracle\\_Analytics\\_Server\)\\_and\\_Data\\_Visualization\\_\(DV\)#Ensuring\\_Reports\\_are\\_Migrated](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/OAS_(Oracle_Analytics_Server)_and_Data_Visualization_(DV)#Ensuring_Reports_are_Migrated)

## *New Business*

### Relevant permissions in Alma

Kevin and Allie explained why requesting “analytics only” permissions in Alma is not advised or, indeed, possible. In order to work on developing reports or analyzing data, you need to be able to verify the data. Someone who needs the ability to create reports also needs, at minimum, one junior-level profile (e.g., fulfillment permissions to view user data, acquisitions permissions to view budgets, etc.). For example, the junior-level acquisitions profile has a “View Only” option for budget data. In most cases, the junior-level acquisitions profile covers all of technical services areas, including data analysis and reporting in that domain.

Furthermore, not every kind of report requires the use of Alma Analytics. Sometimes, you just need to run a search in Alma [not Analytics] and create a set of results—which can be exported in Excel format. Other times, the work may involve just looking at raw data, such as budgets or patrons that meet certain criteria.

We want to be sure we are giving individuals all the tools they need to complete the work, in addition to access to the Alma Analytics module.

Alma staff account requests must be made by managers via the OLS Support Site:  
<https://ols-support.cuny.edu/systems/alma/staff-accounts>

### Master list of prioritized reports

Allie acknowledged the work done by the Analytics Working Group during the CUNY Libraries’ implementation of Alma/Primo VE, especially in compiling a [prioritized wishlist of reports](#) in coordination with the other working groups.

This list was reviewed during the meeting and it was noted that many of the reports that deal with ACRL vis-à-vis e-resources cannot be created within Alma unless and until Alma is set up to [harvest SUSHI data](#). It was also noted that it is possible to [manually load COUNTER data into Alma](#) but, at this time, it’s simpler to just run e-resource statistics as we have in the past: directly in the vendor platforms.

In order to start delivering the reports on the wishlist, the group needs to rally and begin creating reports! Allie recommended that this group reconvene in a few weeks with the goal of taking one or two reports and doing a live, hands-on session to walk through the process of creating a report in Alma Analytics and empower folks to try doing some of this work independently.

Requests for reports not already on the master wishlist but that may have wider appeal should be made on [LIB-REPORTS@listserv.cuny.edu](mailto:LIB-REPORTS@listserv.cuny.edu). Local reports already created at some of the campus

libraries should also be shared via [LIB-REPORTS@listserv.cuny.edu](mailto:LIB-REPORTS@listserv.cuny.edu) so we can learn from one another.

## Organization of reports

The group reviewed some of the shared folders in Alma Analytics to see how other consortia organize their reports. It was noted that we will want to create conventions for naming and organizing our reports. The committee co-chairs will begin a document with the understanding that it will need to be reviewed as our repertoire of reports grows.

## Training opportunities

There is documentation and other training opportunities from the vendor for getting started with Alma Analytics. The following resources were shared during the meeting:

- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/010Introduction/The\\_Basics\\_of\\_Working\\_with\\_Analytics](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics)
- <https://exlibrisgroup.com/customer-education-webinars/?region=americas&product=alma>
- <https://guides.cuny.edu/alma-training/analytics>

Allie also mentioned that part of this group's responsibility is to train others at the CUNY Libraries on using Alma for reporting and analytics. When the time is right, we will plan to offer our own CUNY-specific analytics workshops.

## *Next Meeting*

Allie will send a Doodle poll to pick a time during the week of November 16 to meet for a hands-on session where we learn to create a report in Alma Analytics.