Consortial Analytics: from Alma to Primo

13th IGeLU Conference
Prague, Czech Republic
August 22, 2018
Outline

- Introduction
- Alma
- Primo
- Concluding Thoughts
- Discussion/Questions
Introduction
Abstract

The California State University system migrated as a consortium to Alma and Primo in the summer of 2017. In this session, the presenters will discuss the interchange of local and consortial data in these two environments, and the impact of analytics at different levels informing and augmenting local practices and consortial decisions making.
Introduction

Moon Kim
Acquisitions Librarian
California State University, Fullerton

Andrew Carlos
STEM and Web Services Librarian
California State University, East Bay

Alma

Primo
CSU Stats:

- 23 campuses
- 1 central office
- 484,000 students
- 52,000 faculty and staff
- $5 million electronic core collection (ECC)
- $18 million opt-in content
- Live in Alma and Primo since June 2017
- 8.8 million NZ bibliographic records
Three Purchasing Models in CSUs

1. “Electronic Core Collection” or “ECC” are 100% centrally funded, negotiated, ordered, activated, and maintained by the network office.

2. “Opt-in” electronic resources are centrally negotiated, ordered, activated and maintained by the network office but paid for by each campus (and POL created in the IZ with network office as vendor).

3. “Local-only” purchases are negotiated, ordered, activated, maintained, and paid for by each campus without intervention by the network office.

★ Plus there are other non-purchased resources (bibs usually in NZ; inventory in IZs).
Alma Analytics
Alma Analytics Challenges and Opportunities

Challenges: most of what applies in IZ analytics applies in NZ analytics

- 1 day lag, no analytics connected to sandbox, not all fields indexed, etc.
- Bigger data set often takes longer to process

Opportunities:

- Access to institutional and consortial data in NZ analytics
- Some access to consortial information in IZ analytics
- More consortial and analytics features in the future
Don’t Conflate Alma with Alma Analytics

- Alma is Alma
- Alma Analytics is Alma Analytics
- Don’t assume what’s only available in Alma IZ is only available in Alma IZ Analytics
- Alma NZ Analytics can pull aggregate data from consortial members’ IZs
- Can access some NZ analytics info from IZ analytics, but don’t leave that dimension
What Happened Locally at Fullerton Year One?

- Migration
  - Set-Up SUSHI harvesting post-migration

- Clean-up
  - Connect POLs to inventory; currently cannot gather cost usage until all the connections are in Alma

- Analytics
  - Analytics helps to find what’s missing or what connections are missing
  - New projects
    - New Virtual Bookshelf (got the code from Macquarie and localized the analytics reports that feed the list and carousel)
      - [http://library.fullerton.edu/newbooks/list.html](http://library.fullerton.edu/newbooks/list.html)
      - [http://library.fullerton.edu/newbooks/carousel.html](http://library.fullerton.edu/newbooks/carousel.html)
How to Get Help with Analytics

- IGeLU/ELUNA Analytics WG Page:
  https://igelu.org/special-interests/analytics

- Open discussion list – PLEASE JOIN!
  - analytics@exlibrisusers.org
  - https://exlibrisusers.org/listinfo/analytics

- Ex Libris Analytics Help:
  https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Analytics
CSU Analytics Committees

https://calstate.atlassian.net/wiki/spaces/ULMSR/overview

- Assessment & Analytics Functional Committee (Main)
  - Annual Surveys (TF)
  - Discovery (TF)
  - Resource Sharing (TF)
  - Fulfillment (TF)
  - Resource Management (TF)
  - Data Visualization (TF)

★ TF=Task Force
Consortial Glance: Annual Surveys

- ACRL (Association of College and Research Libraries)
- IPEDS (Integrated Postsecondary Education Data System)
- CSU Annual Survey Page after Alma Year One: https://calstate.atlassian.net/wiki/spaces/ULMSR/pages/208338945/ACRL+and+IPEDS+surveys
- Shared Folders\Community\Reports\Insitutions\CalState\Assessment and Analytics\ACRL_IPEDS\*Committee Generated Reports
Consortial Glance: Collection Development

- Cost per use
- Overlap analysis

Currently, analytics is weak in supporting (collaborative) collection development efforts. Critical area that would help us make decisions but a lot of the work happens outside of Alma.
Consortial Glance: Resource Sharing - Analytics Joint Task Force

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<thead>
<tr>
<th>Borrower</th>
<th>OneSearch Default</th>
<th>Collection Size Group</th>
<th>Borrowing Requests</th>
<th>% Total Borrowing Requests</th>
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<td>1,922</td>
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Consortial Glance: Data Visualization Task Force

Primo Analytics
Review of Primo Analytics

Subject Areas

Different Pieces of Primo Analytics
Subject Areas - Usage

Action

Facets

Popular Searches

Sessions

Zero Result Searches
Subject Areas - Operations

Pipes

PNX Records
Primo Analytics Basics
Primo Analytics vs. Google Analytics
Local Challenges to Primo Analytics

Who?

What?
Consortial Level Primo Analytics?
Plot Twist!

Primo Analytics can be accessed by staff users with any institution-level Back Office role. All staff users can activate reports and also create new reports using data that belongs to their institution.

**Note**  If you have a “central institution” that is used to harvest only shared data sources, accessing Primo Analytics with a user that belongs to this institution will enable you to view only operations related reports regarding pipes and PNX records. If the “central institution” has a view that is in use, you will also be able to view usage-related reports.
How Can Consortial Level Primo Analytics Be Useful?

User Interface Decisions

Facet Discussions

Primo Normalization Rules
What Are We at East Bay Currently Doing?

Comparing our Primo Analytics with other CSUs to see the differences in our data

Collecting Primo Analytics data to decide on changes to make access easier for students
Concluding Thoughts

- Scaling Up Consortially
- Developing Consortial Policies and Guidelines around Analytics
- Opportunities to Collaborate
- Primo VE...
Question for You:

What are you doing consortially in terms of analytics?

- Who has access to NZ analytics?
- What features do you need?
- What can we do together?
- How are you using Primo Analytics, consortially or locally?
Thank You!
Questions?