Getting a count of Summit-requestable materials at your institution

Reporting steps

- Identify all of your institution's Summit-requestable locations and item policies that allow for Summit requesting. If your institution has multiple libraries, please run this report for all of them and submit one total for your institution. (Remember, this annual review is also a great time to consider if you could/should lend from MORE of your locations as demands on print become lower each year locally).
- 2. In Alma analytics, open a new Analysis for Physical Items.
 - a. From Location, add the Location Name dimension.
 - b. From Physical Item Details, add Num of Items (In Repository).
 - c. From Physical Item Details, add Lifecycle.
 - d. **OPTIONAL:** If you restrict Summit resource sharing requests using item policies, from Physical Item Details, add Item Policy.

Selected Columns	
Double click on column r properties, formula and	names in the Subject Areas pane to add them to the analysis. Once added, drag-ar filters, apply sorting, or delete by clicking or hovering over the button next to its na
Location	Physical Item Details
📋 Location Name 🗮	🔋 Num of Items (In Repository) 🗮 📄 Lifecycle 🗮 📄 Item Policy 🗮

3. Filter the Location Name values by the locations that are Summit-requestable - "is equal to/is in" in the Operator dropdown, then check the boxes for all Summit requestable locations.

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erator	is equal to / is in	_	
		*	
Value			🕶 🦚
	CD Collection		-
	CD Reserves		
Protect	CD-ROM		
Convert	CD-ROM Station		
	CD-ROM Station (Local)		
	CD/DVD		
			*
			•
	More/Search Limited Values All Values		
	Protect Convert	CD Collection CD Reserves Protect CD-ROM CONVENT CD-ROM Station CD-ROM Station (Local) CD/DVD CD/DVD CDROM More/Search[Limited Values]All Values	CD Collection CD Reserves Protect CD-ROM Convert CD-ROM Station CD-ROM Station (Local) CD/DVD CD/DVD CDROM More/Search[Limited Values]All Values

4. In Physical Item Details, filter by - Lifecycle "is equal to/is in" in the Operator dropdown, then check the box for Active.

New Filter			⑦ ×
Column	Lifecycle 🗾		r
Operator	is equal to / is in	*	
Value			✓ 💏
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Protect	None		
Convert	Search Limited Values All Values		
			_
		ОК	Cancel

- 5. **If applicable**, filter the Item Policy values. Be mindful of how these policies affect requesting at each RS allowable location, and:
 - a. If your item policies don't ***always*** restrict Summit borrowing across ***all*** of your locations, **run the report** and manually delete values from the spreadsheet for those policies,
 - b. **or** filter by those values using "is equal to/is in," and select all policies that allow Summit requesting across all locations, then **run the report**.

New Filter		() ×
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Operator	is equal to / is in	*
Value		Silection
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Destact	🕑 book	
- Protect	compact disc/sound recording	
Convert	electronic resource	
	equip	
	✓ government doc (in docs stax)	
	🔲 kit	-
	Search Limited Values All Values	
		OK Cancel

6. Send your institution's final Excel report (with one total encompassing all locations/branches/campuses) to the RSF Program Manager, using this form: <u>https://goo.gl/forms/ICFhogCSTEKA0EA92</u>

Outcomes

The end goal is to get an Alliance-wide count of items in Summit requestable locations. Once the count has been submitted by all Alliance libraries, the total will be posted on the <u>RSF</u> <u>Documentation</u> page, under Summit Statistics.