Getting a count of Summit-requestable materials at your institution

Reporting steps

1. 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.
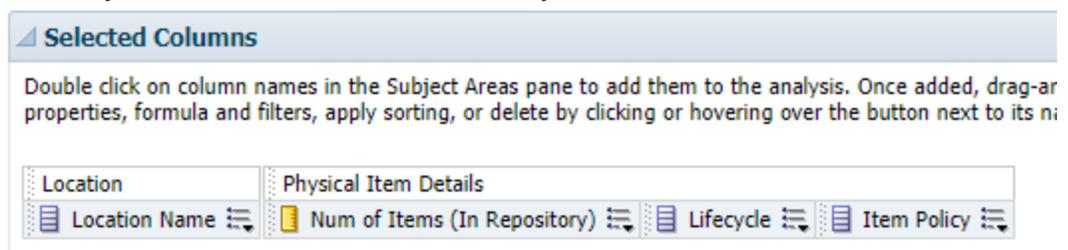
3. Filter the Location Name values by the locations that are Summit-requestable - "is equal to/is in" in the Operator dropdown, then check the boxes for all Summit requestable locations.
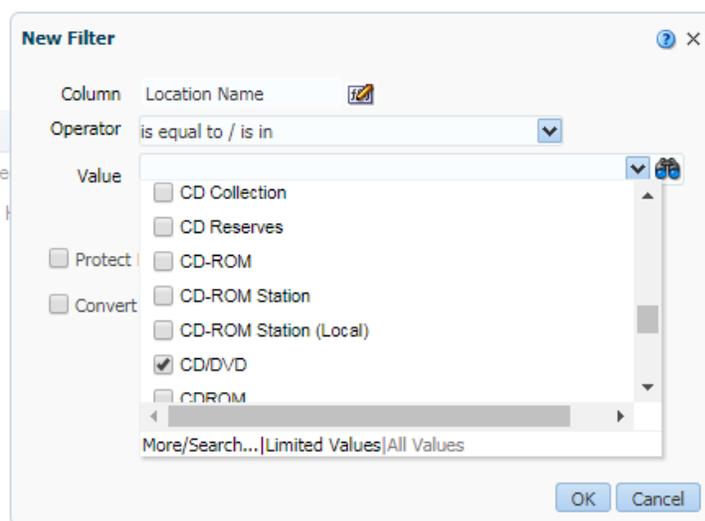
4. In Physical Item Details, filter by - Lifecycle "is equal to/is in" in the Operator dropdown, then check the box for Active.

New Filter

Column: Lifecycle

Operator: is equal to / is in

Value:
- ☑ Active
- ☐ Deleted
- ☐ None

Search...|Limited Values|All Values

OK   Cancel
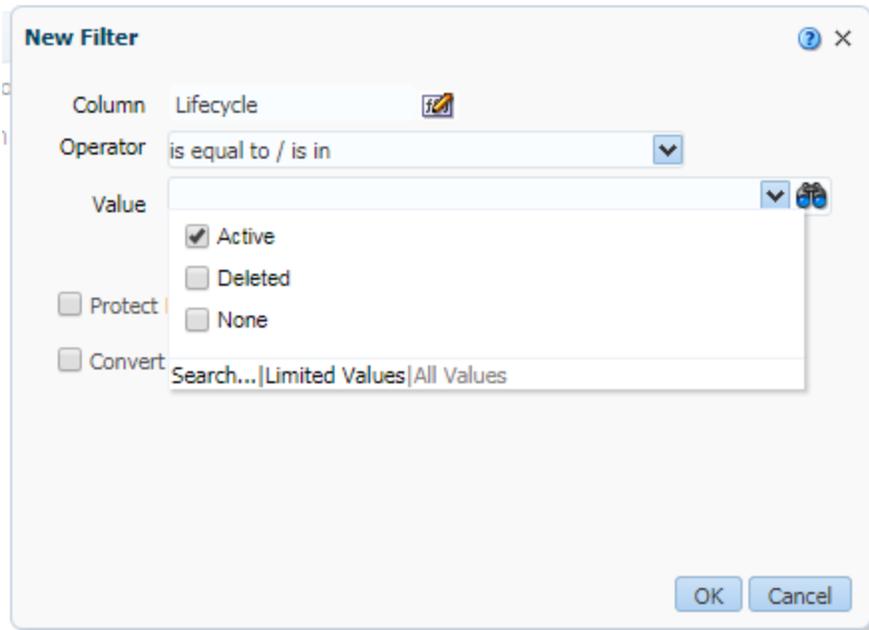
5. **If applicable**, filter the Item Policy values. Be mindful of how these policies affect requesting at each RS allowable location, and:
   a. If your item policies don't ***always*** restrict Summit borrowing across ***all*** of your locations, **run the report** and manually delete values from the 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

Column: Item Policy

Operator: is equal to / is in

Value:
- ☐ accomp mat media circ
- ☑ book
- ☐ compact disc/sound recording
- ☐ electronic resource
- ☐ equip
- ☑ government doc (in docs stax)
- ☐ kit

Search...|Limited Values|All Values

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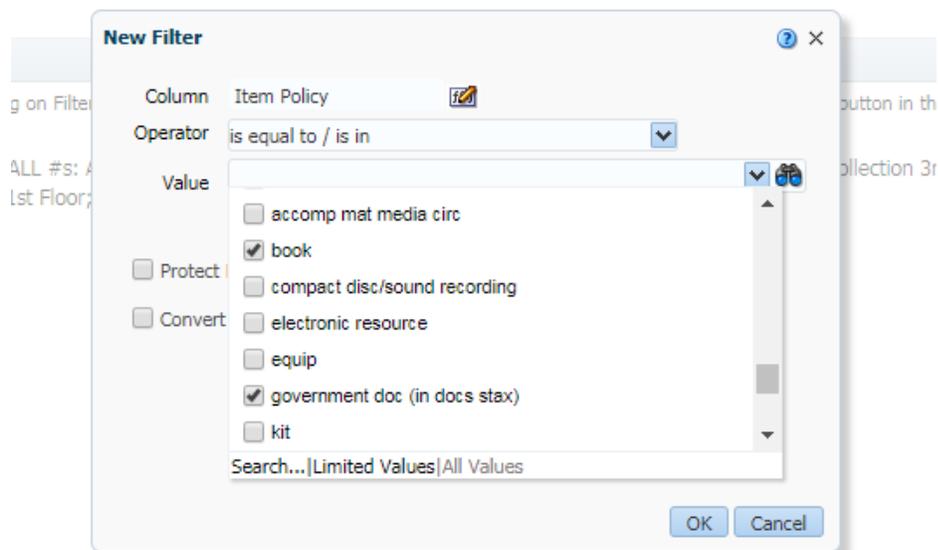
6. Send your institution's final Excel report (with one total encompassing all locations/branches/campuses) to the RSF Program Manager, using this form: https://goo.gl/forms/ICFhogCSTEKA0EA92

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 RSF Documentation page, under **Summit Statistics**.