

ENUG 2021 Day 2: Using Drill Down within ALma Analytics Reports (Ray Schwartz and Linda Salvesen)

Wednesday, 10/27 2:00 PM

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William Paterson is a public midsize University in northern New Jersey near New York City, and our library had Voyager, as its integrated library system for a long time, starting in 2013 Voyager

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recording just started Voyager has been developed by endeavour merged with x leavers in 2006.

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And actually wasn't until the summer of 2019, there must have been when a lot of people migrated.

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But that's when we went live with the other actually was product so Alma and

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an Alma analytics was built on the Oracle business intelligence platform.

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Some very powerful platform but it's not yet well integrated with libraries, because it's complicated software users often not learn from each other in sessions, just like this.

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So our presentation will mostly be actually a live demo.

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But we'll cover the creation of throwdown queries, how we did this with some of our regularly scheduled reports and will also demo the functionality of drilling down.

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How it allows our librarians to identify the items behind the numbers, and how it allows them to more efficiently fix issues but then Allah, which will also show.

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And you might be asking yourself, what do we mean by drill down.

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And again, it's easier to demo but you're down reports allow you to click on particular results and retrieve more information about the item so it's not just numbers.

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And just a quick thing. Some of the audience are having a little trouble hearing your voice can you speak a little more closely to your mic. Oh, sure.

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Is this better.

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Okay, so let me know if anyone can hear me.

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But as I said before we had wayer for a long time.

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And we had in Voyager we had full sequel access to the data. We were numerous web pages and scripts and cold fusion and Pearl to query voyagers Oracle database management system.

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Since Voyager was built on the system data was sent through scheduled email reports or viewed on ondemand web forms and liquids through either an HTML or Excel format.

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And this is an example of one monthly report from 2018, when we had Voyager, so this was shortly before migration, and since our library had Voyager preemie figured Ray would want to expand this slide.

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Yeah.

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We were always about how items were what location they were defined and Miss actually exposed problems that they were as you see, see if I move my cursor here we go.

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The I am part of location because they're the multiplication. The I have a temp location and the I can type a number of charges so when we click on any area and see particular number, and see what those items were so the point and by showing you this

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that we have experienced. We had given our librarians, the ability to drill down in a query before and so we with Alma tried to reinstitute that practice in some fashion.

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So,

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thank you, Ray. And so, with Alma now we are currently using the drill down functionality in three main areas.

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First our current inventory accounts so all physical electronic items. So we'll show an example of this later.

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Also, monthly edition and deletion counts, and will also show an example of that. And then very recently we started creating collection development with words for our liaisons so that they can make more informed items selection decisions and re will take

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you through that first report that we pulled together.

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And at this point, this is where we'll take them through the platform.

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Yes, I wonder if re you could you have a response want me to do that. Okay.

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All right.

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Having a habit up right now, anyway.

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Okay.

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Click on analytics and some of you are probably familiar with this you have a list of reports.

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At some point, we had.

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You say x sleep.

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All these out of the box report so our reports we starting a character in front of it, such as a number sign or a asterisk.

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And back the top to segment them from what respect there anyway I'm clicking. For example, inventories current.

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We have Saget screaming.

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Sorry, I see that snag it's been on shirts, really know if anyone else is that.

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What do you guys see you see inventory.

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Yeah, we can see the screen. Yes, I see, so I'm going to increase the size.

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I see it more easily.

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So what we have here is you can drill down to a certain extent, for example, you have manuscripts physical, right.

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Ol spelt wrong, well you know, So you can look at.

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As you see here comes down is one here for here, and that's really a total of six if you click on that, titles.

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And it gives you the list of the six titles there.

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Now let's see if I can move.

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Good. Okay.

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Now if I wanted to go further, let's say if I just want to look at the five I click on book.

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And I go, or more limited number of books and manuscripts.

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And then if I walk out the door get

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manuscripts. Instead, we heard some political speeches, but also question that was asked by my friend from New Jersey is there anything in this okay so now we have just for size like I hear somebody speak a radio playing somewhere.

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There is and I'm not sure who it is Sandra steel has mute yourself. I'm going to do it manually except oh I want to mute everyone domestic terrorist within days the Department of Justice yes and you're still has their speaker on metal.

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All right. Either way, I guess I'm speaking live I can mute everyone for one second.

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Okay.

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describes a disturbing spike in harassment, intimidation.

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Okay, well you should be able to unmute yourself now. Yeah, I just did.

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Okay, that's good.

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Let's see we have a, how many questions we have here.

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In fact, you know, far as I can tell, busy, presenting.

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Okay, don't worry about that.

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Yeah, so we have this in that area you have things counted the title counts etc.

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Arrange this away from people to check this is strictly what. Currently we have numbers in these areas and course we included the different areas to help figure out what problems are like for example, unknown.

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First of all, what is electronic doing a physical monographs that needs to get corrected, etc.

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So if we look at another one or say, electronic titles, portfolios.

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We have a different set of gear we have even the is free, where we include the free stuff, or stuff we pay for that's there.

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And let's see I think I made it here we go. We can also I do arranging subsets that says, one for by physical year.

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So it shows you, you know how much we're acquiring for each physical year now since we got Alma.

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In 2019, the bulk of the records that came over are Dan and for some reason there were a number of thousands of records that did not have a fiscal year attached to it.

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But that's there to as you say, no one can click and see what those are.

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OK, the next thing I want to show is that we do have monthly reports that come out as here is electronic market crash I'm not sure if you can see that that's a bigger, maybe too big, but yeah.

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Okay, so let's try to get analytics again Yeah, here we go. So in the car a monthly target monographs.

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I have done that for this. Sometimes it takes too long and come on up here.

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Alright, So we have the acquisition for each month.

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And what we've done here for example if you want to know.

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Certainly if you go ahead and click on titles for this.

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You get what 14,000 and maybe you want to see it broken down by the collection development name.

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So if you notice when I clicked on that number.

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You have either titles or collections.

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I click on collections.

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It breaks that down here. As you see by collection and a number, so that if you did want to see the titles under that collection. You can just as well.

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Click here, you have titles.

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And now you have a show you the titles in there. And let me move that over a bit.

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You have showing you what me when it was activated, etc.

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The title is hot like to and you can even look at the Primo record.

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Also,

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so

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some of this toolbox out of the way so get around some stuff here.

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Okay.

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Now I guess one thing I'd like to do is the next thing is to show what we're doing for

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the show, say, the selectors.

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I opened up analytics.

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I go to the catalog and make sure the smaller.

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I'm in the right directory.

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And I have this for one of our selectors this report here is a monthly report as to what electronic portfolios are active in English in the system be admired graphic Viet serial doesn't matter.

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It also links to the, the Primo record.

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Another thing I should mention is that you may see the URL and other things here. When you out, and he gets an email from this monthly.

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So I've done other things to create the URL in the system to show you how that works for example if I go to a .csv is what you actually will get.

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I open that file up.

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And that is, See if I can make this a little bigger.

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You know title, author, you know, etc.

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And I hear a link to Primo were causing a title is not like, but here it is, I click their calls it up.

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And he can get it to

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some of the certainly advantage of having this in Excel is that you can have more manipulation you could get him in a PDF, if you wish. That's possible.

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And back to that, how this is done, I'll show you underneath the layer here is actually asked, certainly I can set, make this a little bigger maybe more visible.

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Maybe I made it too big. Let's see.

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All right. So the activation date filter set the previous month.

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Vale ability has to be a portfolio greater than zero.

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He did give me.

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Thanks, he does political science Urban Studies and legal programs here, didn't give me a J. As the codes that you need to use for LLC classification.

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Urban Studies tend to be all over the LC classification code so we just simply search for the word urban in subjects, I do have a certain singer and make sure that we got a particular one zy no extraneous codes otherwise we would be more particular as

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to what subject headings with us. Also in many of the electronic collections, since they don't necessarily use LLC class, or LLC subject headings. I had him pick and choose which ones that we have access to such as Congressional Quarterly electronic library,

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ethical, legal information. Reference Center, etc.

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So that's there so you know what we could do is create these for each selector, that's appropriate.

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Ok, and now the next thing I get yes yo you probably wonder, how did I do it. How do I make the drill down, like, one thing I can show you right now is let's see what I have here showing example,

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Like, I'm going to have to do is go the electronic cereals.

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And yes, now I remember where that is.

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actually let's, let's go directly to it, cereals would be under dashboards.

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I believe it would be here. Let's see.

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Sorry pounds.

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Yes, cereals drill down. Okay.

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So I go to click on Edit.

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And don't have to know

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me so now I remember. Okay.

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Sorry folks.

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It's a

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here.

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As you see the title is not hot link.

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Neither are few other things.

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I'll show you how that's done.

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You know the criteria.

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And yes title, but we need to actually create a area where we can allow ourselves to, or they link into prima.

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So I go down to MSS ID, again I'm going to make another copy of that in there.

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I'm going to edit the formula. Again the formula.

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I'm going to add

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some text for that.

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As you see, I've added any contains.

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I'm a single quotes and to pipe sites. I'm going to change the custom heading

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there.

00:19:01.000 --> 00:19:06.000

Leave that and it contains that

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I'll save that and make sure I don't lose it for whatever reason, I would go to title column properties interaction.

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I select action links.

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Like here.

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And let's say texts, and I'm going to chase.

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I'll type premium, which was already there.

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Click here create new action, you have choices of action. Put to be I content which is another query, or to a web page was in this case will be the link.

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Now, I need to put in a URL.

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I do that.

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I'll just go ahead and do a Primo Search.

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And let's just say I'm typing in a

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whatever ID.

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gives me the URL I need to use. Let's go back to

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your I'll place.

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And area where that number is, I need to put a curly bracket MSSIDMMSID curly bracket take the number out

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to the ampersand.

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Click on define parameters.

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We need to click both fixing hidden or all of them.

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Take obstacle out.

00:21:02.000 --> 00:21:11.000

If you want to open yourself to another tab we click open a new window. Yes, it says window was really tapped.

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Now we need to change the value of any contains. And then, si de ID column value, opening up calm value. What we did in the longest says any contains in quotes pipe sign that that is what we need to select.

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And then. Okay. Okay.

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Save it.

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We run the results. And what you have now is hot link.

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Clicking on that will now bring you to premium.

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Oh, sure.

00:21:58.000 --> 00:22:02.000

You contains.

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You know I think if you look at that number repository zero. Let's do one.

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There's a problem was that drill down.

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That's interesting.

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It's Aquarius correct.

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Well,

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I'll look into that later.

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In the meantime, I'll show you how to do the drill down, we go back to

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titles if we want to change this to also improve collections.

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I can do here is a dashboard.

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Now, that actually will do it on a nother page, I want to do another page for that.

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So in that case, let's open up.

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Go back down to monthly reports.

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How are we doing timeline for doing good.

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As lot of questions in the chat.

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Yeah, it was just calling up isn't it.

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Someone asked why any comma contains I don't know if you want to go into that

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choice you want to do that with this possible.

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As you see here.

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That's titles.

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Still titles so in this case we could add. Yes. Okay, that's good. So in this case, where I can do the criteria.

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And then

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pick. Let's say number of portfolios.

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Column properties interaction.

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And like text, and let's say collections.

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And I want to do a new one advocate the BI content.

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I go to a directory where I have that particular report.

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Okay.

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Collections

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will be monograph so that's going to be problematic.

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Yep.

00:24:56.000 --> 00:25:01.000

options.

00:25:01.000 --> 00:25:07.000

Not sure if this work because I yes I'm doing and I'm serious. I have a monograph.

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We'll see if this really works.

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Okay.

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Now if I go into here.

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You have bought titles or collections, which one you want.

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Of course because

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it's looking for not being there.

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And if I had the other one it would give me that but that's how you Doug, I had to.

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And this is another thing I want to show you. And the other collection.

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This is what you need to do any other query.

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When you do a drill down.

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This is how it looks.

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And I'm going to move this up.

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All right, you have some of the same parameters so it's limiting your set your, what you have search by the same, but there again. You also are creating other things called property that's as resource type.

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You know, as you see you can equal resource type to any number of different things here.

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But really what you gotta do is call prompted, which means that it's coming over from the other query, you your original query and just copy those values over.

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Okay, so that's what's happening here. If you notice, when you had to search. It didn't say prompted when it gave me the error, it gave me the values, which came from the original search, so that that's how that works.

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so you have to do that now.

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I get what I could have done.

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Let's go back to this.

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and monographs monthly.

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And this has just titles, so like under portfolio material type, I could add the collections one, and that would work in that case.

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So, so I add this like text collections.

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Navigate to bi content.

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monographs real down.

00:27:51.000 --> 00:27:57.000

No collection sorry.

00:27:57.000 --> 00:27:58.000

I hear this.

00:27:58.000 --> 00:28:02.000

Elections my breath drill down. Yeah.

00:28:02.000 --> 00:28:09.000

Every while opening it up in another tab.

00:28:09.000 --> 00:28:10.000

Enter.

00:28:10.000 --> 00:28:15.000

Save.

00:28:15.000 --> 00:28:22.000

And now as you see if I click book here, collections.

00:28:22.000 --> 00:28:26.000

Now it works.

00:28:26.000 --> 00:28:27.000

Now of course.

00:28:27.000 --> 00:28:31.000

But why I see what titles that are on this one.

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I can do with that.

00:28:34.000 --> 00:28:36.000

Okay.

00:28:36.000 --> 00:28:42.000

Well, I guess. Next is.

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So, at this point, these are references to how we did some of this the first, first one talks about linking to like Primo and other types of linking. This advanced analytics, technical seminar but Connie brung does cover action links, a take a drill down.

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We're using our own terminology here. Of course I use pivot tables if you are curious about that.

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So.

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So when do you want to talk more about the, what the documentation that we have here, etc. know we haven't include you in a while.

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Yeah. Very sorry I finally got my cursor in zoom but now I can't get it outside of zoom it seems like I have to do either one or the other, but it's in zoom now.

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So yeah, so I'll just talk about the documentation that we have linked earlier that first. That first link is Ray said it takes you to the next stage where I think there are six different presentations that are that are linked there and a lot of that

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will take you through how to create some of these children's I know a lot of questions are coming up about that.

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And yet there is. So, so it's leavers links to to to those and then on the next page.

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swimming to Highland.

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So again, Alma analytics is built on top of Oracle business intelligence so of course Oracle has their own documentation available so.

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So that's a really good resource and then also Harvard and Peking.

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We know lots of. There are lots of good wikis, assuming wiki for answering basic questions or even more advanced questions about Primo. And so this is a good, good resource that we also use again we will be sharing this PowerPoint so you can access all

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of these links, and then also the recording, in case you want to go back and, you know, watch it and parts, some I mentioned to get this working for yourself.

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And that's it. Sorry, I don't know if you wanted to look through those like a bunch of questions that come up.

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I can, I can try to sort through the questions and see if some of them have been answered no other audience members to be answered. So, yeah, stop sharing here.

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See how I

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am I still sharing I guess I am you are in fee

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I found it. Okay. And one more. There we are.

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If you have any questions,

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stop sharing.

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There we go.

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Alright, so I guess if you can read through some of the questions I will, I will, so the first one was just if you were going to share links to the reports, we've already covered that I think I'm the second one from Sean, with the inventory reports where

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those out of the box reports.

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No, No, I had to create them.

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Problem is, yeah, one day so particular and the out of the box reports just, I mean I think they rarely cover any particular library very well I'm I happened to be on the analytic community of practice, and that's you know we've all sort of a, none of

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us really find the out of the box reports, other than starting to build a report and we modified them greatly

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inventory report that was a dashboard so that pulled together a couple of different.

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Okay. Okay. Your next question from Madeline. Is this something you create an analytics or does almost do this automatically with print and non print books.

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I had to create analytics.

00:33:05.000 --> 00:33:10.000

Okay, moving on down. Let's see.

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I'd like to know how you created the electronic portfolio.

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Oh, well I, yeah, if you can email me, I think what you want to do is you want me to give you a particular as as to how I built it, you know, I showed some particulars but I have to go into a little more well I'm not gonna try to do also is share our

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PowerPoint with you, which I believe, trying to do that you can't, it doesn't seem like this version of zoom allows me to upload a file into the chat.

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So I can't do that.

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But your contact information is available correct, and it will be also when, when the stuff is posted after the conference. Okay, next question is from Kristin and I know Linda had sort of started addressing this, why is any contains did you answer that

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within the within the presentation wise any contains Well, basically, you could do any number of different ways to do search because when you search and Primo and it contains it's not the only factor is after query.

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Um, if I can do a.

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Okay.

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If I can just like copy some things here and share the screen Let's see here.

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Let me drag this thing over

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course will have to make bigger text.

00:35:02.000 --> 00:35:05.000

searchable by search.

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If I go in and search.

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Hang on to any field is exact search that that will have a very different.

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Now have any, any comma exact comma.

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You know, if there's also starts with.

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And if I search that. Now I'm not able to show you but I'm searching in primo right now.

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And if it's showing after query equals title, comma begins underscore with Tom.

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And these are these are particulars within Primo.

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And we need to attach that to that echoes in that is part of one of the videos where it's

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actually verse librarian was illustrating how that's done.

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We see if I can share the screen here.

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Screen too.

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Sure.

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So I said, start with their, right.

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So, here, you'll see title begins with.

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If I change this to contains.

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I'll search. And that's the query equals title contains.

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But if I have this is any field and contains and search query equals.

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Any comma contains.

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So I mean, it depends on what that search, you know, how you walk that link to respond. Are you are, what that link to do it needs to do to go into Primo.

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I think I should answer your question, made sense to me anyway. Oh, and several people commented that they were needing to be written down to follow Him and Leslie shared a link to excellent versus page on how to do some of the stuff you were doing there.

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And so I'll go to the next.

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Sorry, what was that question again. It wasn't exactly as a more of a comment several people commented that they felt that they were going to be either rewatch it several times or have you write stuff down and then Leslie shared a link to where actually

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Bruce has some of this stuff documented and that seemed to, you know, meet the need there. So then I'll go.

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Let me. Let's see.

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Somehow if I put this in there that

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link show up now they don't just go I can put them.

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Yeah, let me, let me click on them and see if I can put links in chat. Okay. Okay, we'll keep an eye out for that. Then, are there any other questions.

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Yes, there are a few more you.

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How do you create from meddling and how do you create electronic portfolios and answer to this would be helpful so I think you were talking about an answer to this would be helpful for me as I ordered several ebooks that need to have portfolios created

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and no one's been able to help you sort of already said right that you would need to share more information is that correct.

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Yeah, yeah. I mean, it was tricky.

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It was true.

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So you have a links for

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linking. And then this one here is a slide player for the technical seminar includes a lot more than just action links is quite good magazine. Just anything as you saw the pivots that I didn't nobody really asked about that but sometimes if you walk the

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pivot stuff.

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We will.

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Yeah, we will be sharing, obviously the PowerPoint will be up at some point. Correct, Yeah, I see, I see where Susan also shared some information for Madeline and she writes medland or if you know the book is part of a particular collection you can search

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for that collection, then edit service then click on portfolios tab and load the portfolios. Choose Add local portfolio you'll get a wizard to fill out.

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And then looked at on to see if we've got any more questions down here, more stuff.

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One thing I'll do is I'll save the chat, and then I'll look at it, or thoroughly some of the questions and see if I can get back to people on that, terrific, terrific.

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I think that will help. I think a lot of the questions that were coming in are getting answered between the links and, and the knowing that they're going to be able to get this information again.

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When the recording comes out.

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So at this point, I guess I'll ask Are there other questions or discussions or, I'm sorry I put my question in the chat twice and it still hasn't.

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I'm asking is, raid.

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You know how you can share reports through all community. Can you can you put your inventory reports in William Patterson's institutional folder and the shared on reports so that some of us can go you know poke around on those copies and see how you construct

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it them.

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them. Okay, I'll do that.

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Great, thank you. Yeah, it's up. Yeah, I have to say we're learning assault process and some who were the first ones were rather sloppy particularly the dashboard we did that first.

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So, I'll probably share you the monthly reports first thing, the selector. The dashboard reports have to be cleaned up some more.

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Sure, that's the whatever anything that just lets me see under the hood how you construct and something will be very useful thank you so much for the.

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If anybody wants to actually unmute and ask the question because sometimes.

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What's written in text doesn't quite address what you really want to hear, necessarily.

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Absolutely.

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Guess that's it.

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I guess that's it. I guess lending I was well I also had any other questions. Oh, no, maybe not.

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Okay, Well I guess that's everything then, thanks for an interesting presentation lots and lots of questions.

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And for what you had to share sounds like a lot of people want to pick up the stuff you had to share so much, we actually were, we were still writing some of this, just a few days ago.

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Yeah, you'll have that it's a work in progress, always is.

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Absolutely. Okay then we've got about, we've got a good break people are going to get a chance to like run to the other room get a snack on the bathroom stretch.

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And we should be meeting back here for the next presentation at about three o'clock.

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Thank you, nice presentation.