

Best Practices

1. Privacy

IZ: Alma Configuration > Fulfillment > General: Fulfillment Jobs Configuration > Anonymization Job
?

2. Cleanup

[Describe directory structure, publishing, delete permissions]

Directory	Zone	Shared with..	Who can edit/delete?
My folder	IZ/NZ	Not shared	User only
Shared Folders/ <i>MyInstitution</i>			All users from your institution
Shared Folders/Community Shared Folders/Community/Reports/Institutions/Calstate	IZ/NZ	NA03 immediately, Synced to all Analytics instances each Friday	All Alma users
Shared Folders/California State University Network	NZ		All CSU Users

3. Copying

Use copy/paste. Never drag/drop!

4. Lifecycle

?

5. Naming Conventions

Community/Reports - “Each institution prefixes the name of the report with its institution name and a dash so that each report is identifiable by the institution that contributed it.” (Reports that are contributed by Ex Libris are prefixed with ‘Ex Libris’.)

6. Versioning

v1-..., v0 or null for final?

Policies

1. NZ Access

- **Policy Statement:**
 - Any CSU library employee who needs access to Network Zone Analytics may request an account from Brandon Dudley or other appropriate CSU NZ management staff; account requests must include the reason(s) why access is needed
 - The CSU reserves the right to deny or revoke Network Zone Analytics account privileges for any reason, including, but not limited to: violation of CSU policies regarding information security or responsible use of computing resources; sharing of credentials; inappropriate use of shared folder areas; lack of use or justifiable need for NZ Analytics access; separation from the CSU
- **Rationale:**
 - Network Zone Analytics is the only method available for critical reports in many areas, including Resource Sharing (lending data) and Electronic Resources (Network Zone shared resources); therefore access should be granted freely to any CSU library employee who needs this data to do their work.
 - Network Zone Analytics gives users access to all data (except user data that has been anonymized) from every campus; therefore, while access should be granted willingly, some justification should be provided along with each request, and account holders must follow the policies set forth by the CSU and the Assessment and Analytics Committee in coordination with the ULMS Steering Committee and COLD.

2. Privacy

- **Policy Statement:**
 - Analytics users must follow the provisions of the [CSU Information Security Policy](#) as well as the Information Security and Responsible Use policies for their home campus
 - Patron data - In keeping with [ALA's Privacy Guidelines](#), do not expose personally identifiable information in conjunction with user specific resource usage; personally identifiable information contained in any query that is downloaded or otherwise removed from the Analytics environment must be treated according to [CSU Information Security Policy](#) section 8025.00 | Privacy of Personal Information
 - Acquisitions - As the terms of many deals are confidential to individual campuses or within the CSU, users should refrain from sharing any expenditure information without the explicit permission of an authorized administrator from the Chancellor's Office or appropriate campus(es).
 - Account credentials - Analytics users should never share their account credentials with others, including staff and student employees
- **Rationale:**
 - Any Alma user with the Design Analytics role can create queries on any Analytics subject area, including sensitive areas such as Users, Fulfillment, Fines and Fees, Resource Sharing, and Funds Expenditure
 - Network Zone Analytics users cannot query patron data due to anonymization processes, but they can report on Fund Expenditure data from any campus; the terms of many deals are confidential to individual campuses or the CSU consortium (SDLC)

3. Sharing Reports

- **Policy Statement:**
 - Limit use of the Calstate shared folder to the following:
 - Sharing or jointly developing reports with one or more people at other CSU campuses

- Sharing or jointly developing reports with one or more people at other Alma libraries
 - Sharing reports with the Alma community at large
- Adhere to Ex Libris report naming conventions: prefix the name of the report with your institution name and a dash
- Place reports within the relevant subfolder, creating a folder if necessary
- Reports must have a meaningful name and description
- **Rationale**
 - Reduces clutter and navigation difficulties as the number of reports in the shared folder grows over time
 - Helps to ensure shared reports conform to community standards as any report in the Community folder is available to all Alma customers

4. Backup

- **Policy Statement**
 - Chancellor's Office staff will maintain an Alma account for the specific purpose of performing a monthly backup of all report folders in the Alma Analytics Community Calstate folder
 - Backup folders will be retained for one year in the My Folders area of this account
 - Backup copies will be supplied on request to restore shared reports that have been irretrievably changed or deleted for any reason.
- **Rationale**
 - Analytics Committee members and other CSU personnel have put considerable effort into developing specialized custom toolkits to assist CSU campuses with reporting needs (e.g. ACRL reports and Collection Development tools)
 - Alma Analytics only supplies two places to share reports:
 - The California State University Network folder, which is only accessible from NZ Analytics and therefore only usable for sharing reports meant to run in the NZ
 - The Calstate folder under Institutions in the Community area, which is the only available location for sharing reports meant to run in the IZ
 - The Calstate folder is therefore the preferred folder for general sharing of reports and reporting toolkits among CSU campuses
 - By design, folders and reports in the Community area are open to all Alma users, with full read/write access, as the intent of this folder is to share Analytics reports as widely as possible
 - While we fully support the concept of community sharing, this structure means that customized reports mainly intended for the CSU audience are vulnerable to editing or removal by any user, within or outside the CSU. Ex Libris has clarified that it is not possible to selectively protect these reports.
 - A regular, systematic backup process will preserve shared CSU analytics reports while relieving individual report creators from this responsibility; this will also ensure preservation for reports created by employees who have left the CSU.

5. Audit

- **Policy Statement**
 - The working group's assumption is that active reports will be maintained in the Calstate Community Folder.
 - Reports will be reviewed on an annual basis for the following:
 - Reports adhere to Sharing Reports policy
 - Reports still run
 - Reports still query the relevant/appropriate subject areas and fields
 - Reports that don't conform may be deleted.

- **Rationale**
 - Reduces clutter and navigation difficulties as the number of reports in the shared folder grows over time
 - Helps to ensure shared reports are still functional and relevant
 - Helps to ensure shared reports conform to community standards as any report in the Community folder is available to all Alma customers

6. Report Requests

- **Policy Statement**
 - Training: The committee will facilitate or provide system-wide training opportunities as needed and at their discretion
 - Project support: The committee will support analyses for COLD and its subcommittees
 - Ad hoc support: Committee members will answer questions and provide assistance with individual reporting needs at their discretion and as time allows
 - System-wide reports: The committee will develop and maintain a limited set of reports with broad or system-wide utility, such as annual surveys and COLD projects.
- **Rationale**
 - Support from the Analytics Working Group is not a substitute for Ex Libris-contributed documentation and training videos. Basic analytics and reporting questions may be answered by consulting existing documentation and videos.
 - However, the committee recognizes the need for support for system-wide or other major reporting and training needs and will provide support where possible within the time constraints of the members

Procedures

1. Access

NZ requests to Brandon.

2. Deleting Reports

Items saved in the Community folder have special rules for deletion. Follow the instructions from Ex Libris below and the items will be deleted in the weekly job.

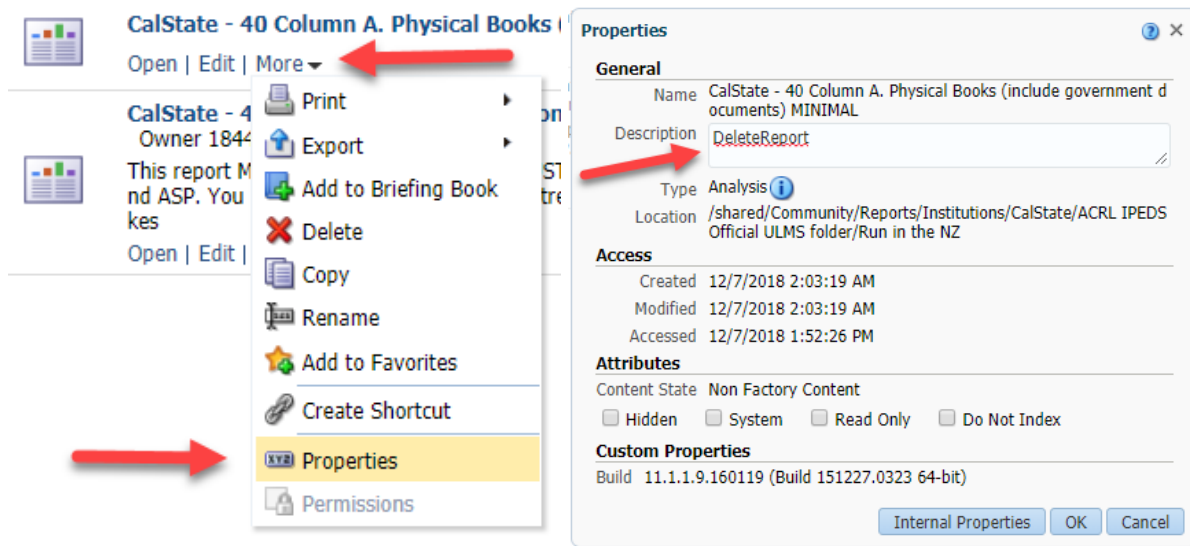
If you delete a folder or file in the community folder, it is deleted only from the data center of your region. The folder or file is restored after the weekly synchronization between data centers. To perform a deletion from the community zone, do the following:

- To delete a file, prompt, filter, shortcut, or report, put the text **DeleteReport** in the description. This marks the entity for deletion.
 - To delete a folder, put the text **DeleteFolder** in the description. This marks the folder for deletion.
 - A folder can be deleted only if a) it has **DeleteFolder** in the description, and b) it is empty or all entities under it are also marked for deletion.
 - To delete a dashboard
 - If the dashboard icon contains a folder, put the text **DeleteDashboard** in the description to mark it for deletion.
 - If the dashboard icon does not contain a folder, put the text **DeleteReport** in the description to mark it for deletion.

- A dashboard can be deleted only if a) it has **DeleteDashboard** or **DeleteReport** (as noted above) in the description and b) it is empty or all editable entities under it are also marked for deletion.

For more information, see [Community Folder Structure](#) in the Ex Libris Knowledge Center

To get to the description, click More under the report name, choose properties, add the appropriate text to the description (replacing existing text if it exists) and click OK.



3. Report Requests

?

4. Training

?