

Analytics Remote Workshop Agenda

Goals	• Revise and expand staff understanding of Alma and Primo analytics • Identify areas for more detailed later discussion
Prerequisites	• Alma/Primo VE initial training completed • Alma/Primo VE production environment delivered • Go Live on Alma and Primo VE
Format	• Demonstration-led discussion <i>Note: hands-on exercises are not included</i>
Expectations	• Subject matter experts on the project team will be available for relevant discussions • Attendees will be prepared to actively discuss their needs, the work they perform, and their understanding of Alma • The project manager or designated library project member will record action items for later follow-up
Outcomes	• Revised or expanded understanding of analytics functionality • List of action items for follow-up after the workshop

Session 1: Day-to-Day Fulfillment Reporting	
Live Recording (with chat and transcript; available until Jan 7, 2022) Archived Recording (transcript and chat)	Day-to-day fulfillment reports: • How many loans, returns, and renewals have occurred in the past week • How much has the library collected in fines and fees • How many items were requested during the past week
Session 2: Day-to-Day Acquisitions Reporting	
Live Recording (with chat and transcript; available until Jan 7, 2022) Archived Recording (transcript and chat)	Day-to-day acquisitions reports: • New titles received in the past month • Obtaining a list of resources ordered and received or activated but not paid • Identifying resources ordered and paid but not received or activated
Session 3: Physical Resource Management Reporting	
Live Recording (with chat and transcript; available until Jan 7, 2022) Archived Recording (transcript and chat)	Physical resources reports: • How many physical items are found in the library's collections • How many duplicates are found within the institutions collections • The number of records overlaid, merged, created, updated, deleted by operator
Session 4: User Management Reporting	
Live Recording (with chat and transcript; available until Jan 8, 2022) Archived Recording (transcript and chat)	User management reports: • Users and statistical categories • Users with expiration dates in the past or coming soon • Staff operators and assigned roles
Session 5: E-Resources and Usage	
Live Recording (with chat and transcript; available until Jan 8, 2022) Archived Recording (transcript and chat)	E-Resources and Usage reports: • Most used titles • Overall usage by months and years • Resolver statistics by source • Most frequently used databases, journals, and books

Session 6: Course Reserves and Analytics

[Live Recording](#)

(with chat and transcript;
available until Jan 9, 2022)

[Archived Recording](#)

([transcript](#) and [chat](#))

Course reserves and analytics reports:

- How many courses and reading lists were created and managed in the past year
- How many items were added to reading lists
- Heaviest usage of physical and electronic resources on reading lists

Session 7: Creating and Managing Dashboards

[Live Recording](#)

(with chat and transcript;
available until Jan 9, 2022)

[Archived Recording](#)

([transcript](#) and [chat](#))

Creating and managing dashboards:

- Creating dashboards
- Creating dashboard prompts

Session 8: Reporting for Consortia with Networks

[Live Recording](#)

(with chat and transcript;
available until Jan 10, 2022)

[Archived Recording](#)

([transcript](#) and [chat](#))

Reports for Consortia with a Network Zone:

- Identifying records not linked to the Network
- Obtaining the number of physical items held by institutions within
- the consortium by LC or Dewey classification code
- Overlap analysis for physical resources among the institutions within the consortium

Session 9: Data Visualization with Oracle Analytics Server

[Live Recording](#)

(with chat and transcript;
available until Jan 10, 2022)

[Archived Recording](#)

([transcript](#) and [chat](#))

Data Visualization:

- Presenting abstract information in graphical form.
- Discovering patterns, trends and correlations