

**ExLibris**  
Part of **Clarivate**

**IGOLU**  
*International Group of Ex Libris Users*

# Turning Data into Insight

**Raphael Gabbay**  
**Cross Product Team**



# Agenda

- Library Analytics: Expanding On All Fronts
- Analytics New layout
- Data Visualization
- Turning Data into Insight
- Collection Development Initiative
- DARA – Smart Recommendation

# Library Analytics Expanding On All Fronts

**Collect**

From siloed analytics to a “Library Analytics”

**Explore**

Report. Share. Schedule.

**Insight**

Out-of-the-box insight dashboards

**Action**

From Insight to Action. DARA and more.



Focusing on the  
“Collection Development Initiative”  
as a case study

# New Analytics User Interface in Alma

Explore

## Analytics New User Interface rollout phases

- 1 Launched in February 2023 as "Opt-in"
- 2 Shifted in August 2023 as "Opt-out"
- 3 Full integration by November 2023

# New Analytics User Interface in Alma

Report. Share. Schedule.

Explore

The screenshot displays the Alma Analytics interface with four callout boxes highlighting key features:

- 1 Filter Options:** Points to the top navigation bar where filters for Name, Type (Data Visualization Workbook), Source System (All), Badges (All), and Subject Area (All) are visible.
- 2 Flexible Scheduling:** Points to the 'Schedule' section, which includes a 'Schedule Report' toggle and a 'Recurrence Pattern Weekly' set to 'Every 3 week(s) on Tuesday At 09:00'.
- 3 Deep Link:** Points to the 'Report URL' field in the report details, showing a long alphanumeric string.
- 4 Preview in Alma:** Points to a horizontal bar chart titled 'Num of Titles (All) by Group1', which displays data for various subject categories like Commerce, English literature, and History of Asia.

# New Analytics User Interface in Alma

## Data Visualization on Homepage

Explore

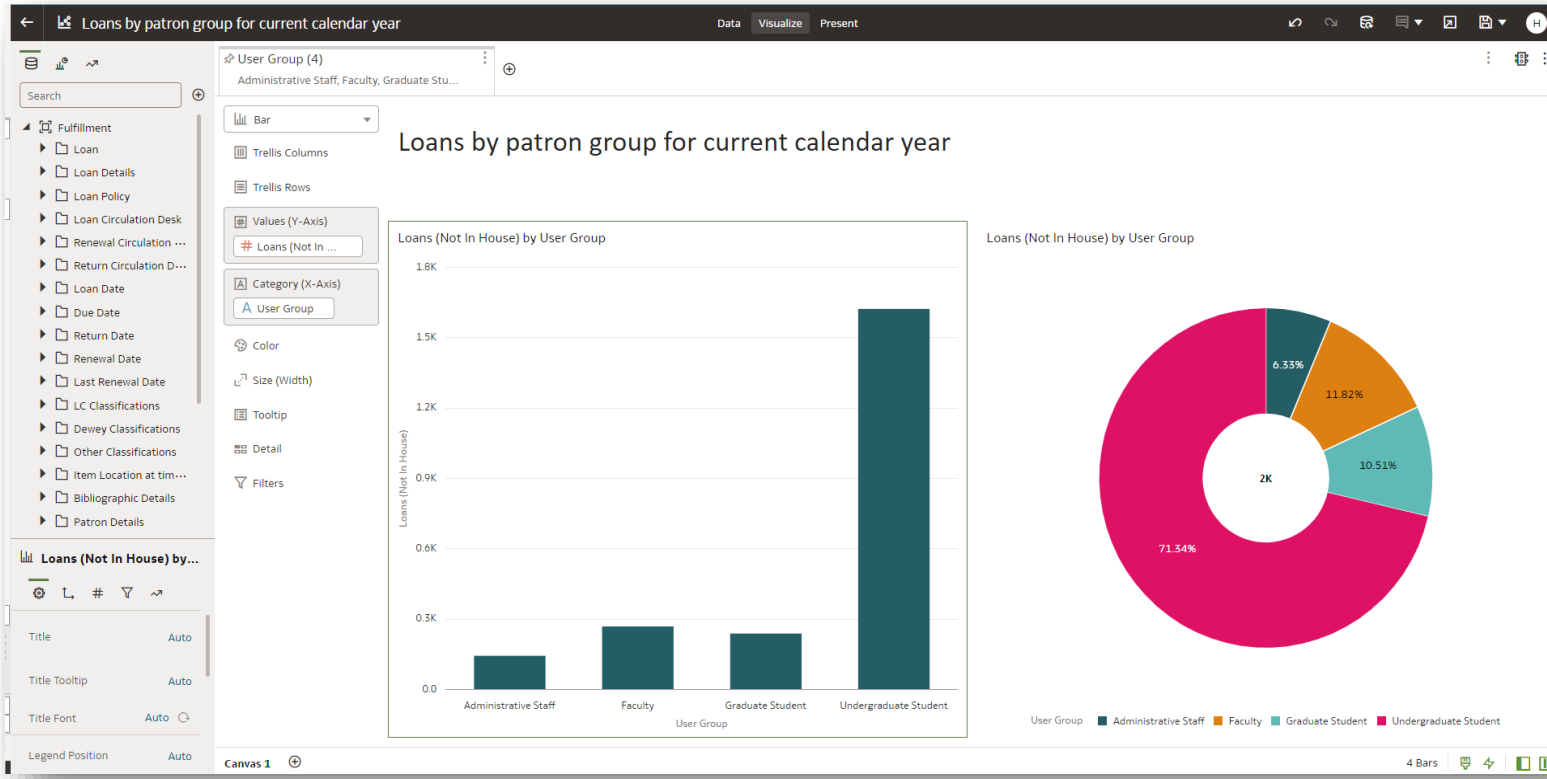
The screenshot displays the Alma Analytics homepage. On the left is a navigation sidebar with categories like 'Alma QA', 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', 'Analytics', and 'Configuration'. A 'My Homepage' menu is open, listing various dashboard options. The main content area features a donut chart titled 'Num of Titles with Physical Items (Active), Num of Titles with Digital Representations (Active), Num of Titles with Electronic Portfolios (Active)'. The chart shows 84.97% for Physical Items, 14.97% for Electronic Portfolios, and 0.06% for Digital Representations, with a total of 365K titles. Below the chart is a table with the following data:

| Num of Titles with Physical Items (Active) | Num of Titles with Electronic Portfolios (Active) | Num of Titles with Digital Representations (Active) |
|--|---|---|
| 54,589.00                                  | 309,747.00  | 206.00  |

On the right, a 'Report Preview' panel is shown, which includes a 'Summary' section with a 'Schedule Report' toggle, a 'Report Preview' section with a 'View full report' link, and an 'Add as dashboard' checkbox that is checked. A legend at the bottom of the report preview identifies the colors for Physical Items (teal), Electronic Portfolios (dark teal), and Digital Representations (orange).

# Data Visualization: from Data to Insight

Insight



- 1 Simple and intuitive user interface
- 2 Immediate preview
- 3 Actionable data
- 4 Dynamic - drill down options



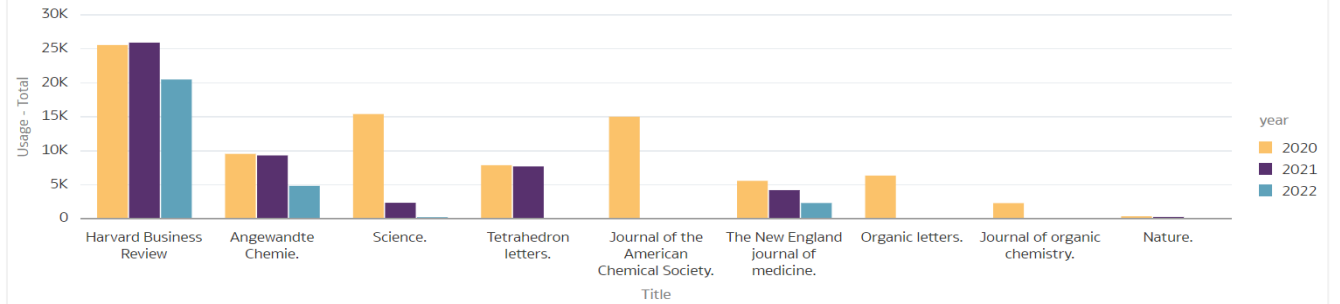
# Data Visualization: from Data to Insight

Classifications **Electronic collections** Available Electronic Resources Newly activated portfolios and collection»

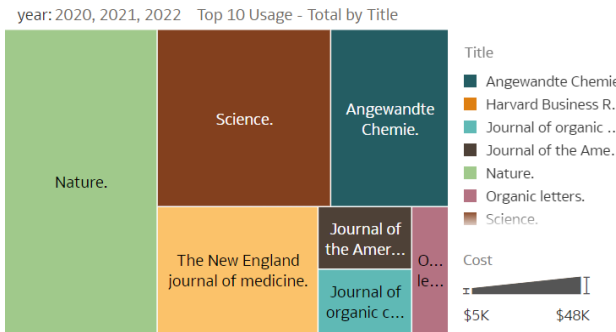
## Electronic collections - drill down to Portfolio

| Electronic Collection Public Name               | Electronic Collection Id | Electronic Collection Creator | Electronic Collection Activation Date | No. of Portfolio (In Repository) |
|---|--------------------------|-------------------------------|---------------------------------------|----------------------------------|
| Alexander Street Digital Karl Barth Library     | 61286041850001891        | paula.hasler                  |                                       | 96                               |
| Philosopher's Index                             | 61188047790001891        | sonya.maclairin               | 11/21/2014                            | 0                                |
| World Religion Database                         | 61352508510001891        | melanie.lewis                 | 10/25/2022                            | 0                                |
| 17th-18th century Burney Collection newspapers  | 61162398140001891        | P2E_JOB                       | 2/13/2014                             | 0                                |
| 19th century British Library newspapers         | 61163211450001891        | P2E_JOB                       |                                       | 0                                |
| 2022 Brill Biology Journal Collection           | 61328564360001891        | melanie.lewis                 | 2/16/2022                             | 16                               |
| 2022 Brill Religious Studies Journal Collection | 61328564390001891        | melanie.lewis                 | 2/16/2022                             | 57                               |
| A+ education                                    | 61163211330001891        | P2E_JOB                       |                                       | 0                                |
| AASD Australian art sales digest.               | 61163158970001891        | P2E_JOB                       |                                       | 0                                |
| ABC-CLIO eBooks                                 | 61277481730001891        | System                        |                                       | 0                                |
| ABI/INFORM Collection                           | 61277477240001891        | System                        |                                       | 0                                |
| ABI/INFORM Dateline                             | 61277477320001891        | System                        |                                       | 0                                |
| ABI/INFORM Global                               | 61277480910001891        | System                        |                                       | 0                                |
| ABI/INFORM Trade & Industry                     | 61277480880001891        | System                        |                                       | 0                                |
| ABI/INFORM complete                             | 61163158930001891        | P2E_JOB                       |                                       | 0                                |
| ACCESSSS  | 61258801620001891        | louisa.fisher                 | 7/2/2019                              | 0                                |
| ACLS Humanities eBook                           | 61277476890001891        | System                        |                                       | 0                                |
| ACM Digital Library Complete                    | 61262337860001891        | System                        | 9/11/2019                             | 12,041                           |
|   | 61262567670001891        | System                        | 9/11/2019                             | 12,041                           |
| ACM portal the ACM Digital Library.             | 61156159790001891        | P2E_JOB                       | 12/5/2013                             | 0                                |

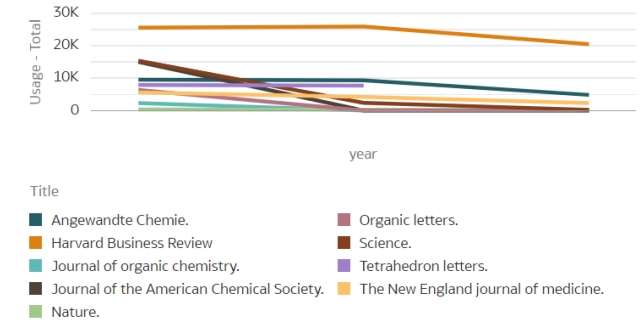
## Top 10 Journal Usage 3 Years



## Top 10 Journal Cost 3 Years



## Top 10 Journal Usage 3 Years



**Creating Out-of-the-box  
Data Visualization workbooks in  
cooperation with the community  
to support data-driven workflows**



# Collection Development Initiative

# Collection Development: Use Cases



Last Copy

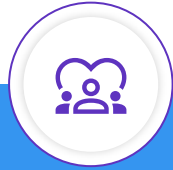


E-Resource Renewals



Collection Development by Subject

# Collection Development: from Insight to Action



## Focus Group

Institution and consortia:

**Launch: June 2023**



## Insight Dashboards

Insightful out of the box dashboards

**First deliverables:  
End of 2023\***



## Next Phase: Actions in Alma

DARA recommendations  
Cross Product Opportunities

**First deliverables  
2024 H2\***

\*Subject to change



# Books Retention and Weeding Dashboard

Insight

Scope

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Institutions

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Consortia

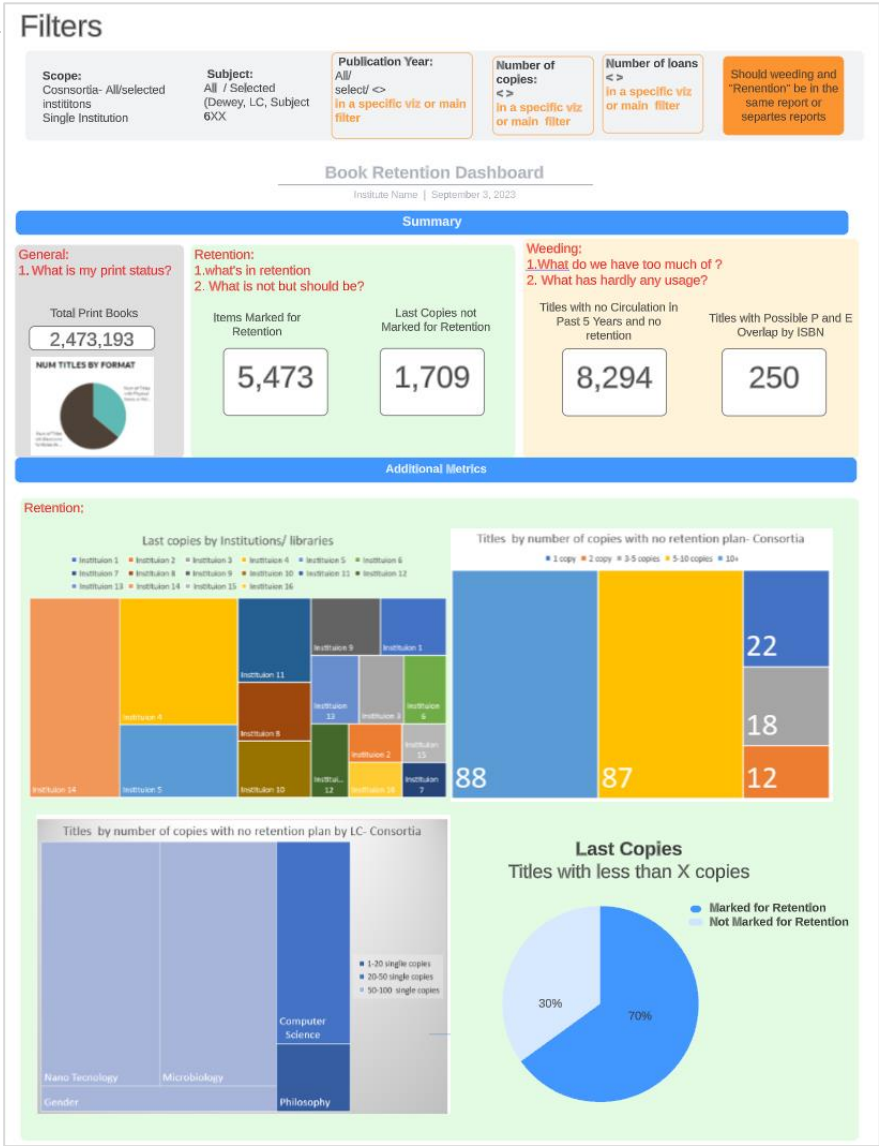
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Shared Print

Dashboard Scope: Include & Exclude

Retention: Business Questions

Retention: Insights to Actions



Weeding: Business Questions

Weeding: Insights to Actions

\*Subject to change

# First Dashboard Reviewed By The Focus Group: Books: Institutional level



Library Name (Active) All | LC classification All | Dewey classification All | Publisher (to exclude) All | Location Name (to exclude) All | Process status (to exclude) All | In active course All | Has OCLC number All

### Books Last Copy and Retention

This dashboard is designed to provide you with insight about your last copies and possible actions they require. Whether identifying items that must be committed to retain or providing a general status of your last copies all across your institution.

**Titles with one copy**

## 1,244,492

#### Last copies marked for retention

| Marked for retention | Percentage |
|----------------------|------------|
| No                   | 92.25%     |
| Yes                  | 7.75%      |

#### Last copies by classification

Select classification type: LC Classification

| Classification Category               | Count |
|---------------------------------------|-------|
| English literature                    | 71K   |
| American literature                   | 51K   |
| Christian Denominations               | 48K   |
| Literature (General)                  | 31K   |
| Philosophy (General)                  | 30K   |
| Industries. Land use. Labor           | 27K   |
| United States                         | 25K   |
| The Bible                             | 24K   |
| French literature                     | 29K   |
| History of Asia                       | 23K   |
| Spanish literature                    | 17K   |
| Doctrinal Theology                    | 18K   |
| Mathematics                           | 17K   |
| Visual arts                           | 17K   |
| History of Great Britain              | 19K   |
| Law of the United States (Federal)    | 19K   |
| History (General)                     | 17K   |
| Social and public welfare. Crimino... | 17K   |
| The Family. Marriage. Women           | 16K   |

#### Last copies by library

| Library Name (Active)         | Count |
|-------------------------------|-------|
| Theology and Ministry Library | 71K   |
| Law                           | 51K   |
| Cushing/Kennedy Res. Center   | 48K   |
| Bapst                         | 31K   |
| Burns                         | 30K   |
| Internet                      | 25K   |
| Social Work Library           | 24K   |
| Educational Resource Center   | 23K   |
| Weston Geophysics             | 29K   |
| Burns - Archives              | 27K   |
| Resource Sharing Library      | 25K   |
| O'Neill                       | 19K   |

\*Subject to change

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| Philosophy (General)                                    | 30K   |
| United States   | 25K   |
| History of Asia   | 23K   |
| Law of the United States (Federal)                      | 19K   |
| History of Great Britain                                | 19K   |
| French literature                                       | 29K   |
| Theory and practice of education                        | 25K   |
| Industries. Land use. Labor                             | 27K   |
| The Bible   | 24K   |
| Spanish literature                                      | 17K   |
| Mathematics   | 17K   |
| History (General)                                       | 17K   |
| Social patholo... Social and public welfare. Crimino... | 17K   |
| Visual arts   | 17K   |
| Doctrinal Theology                                      | 18K   |
| The Family. Marriage. Women                             | 16K   |

### Geographic location : Number of last copies by library

Legend: Address (Green dot), Num of Titles (Color scale from 543 to 564K)

© 2019 Oracle Corporation | Map data © 2019 HERE | Windows.

\*Subject to change

# Collection Development Insight Dashboards

So, what's next?

Insight

## Books (2024)

Last Copy (institution)  
Shared Print (institution, consortia)  
E-Resource Renewal (institution, consortia)  
DEI Dashboard (institution, consortia)

## Serials (2024 - 2025)

Last Copy (institution, consortia)  
Shared Print (institution, consortia)  
E-Resource Renewal (institution, consortia)  
DEI Dashboard (institution, consortia)



\*Subject to change



# DARA

Data Analysis  
Recommendation  
Assistant





# DARA Today

Action

○ Rules based AI

○ 22 recommendations collaborated with a dedicated focus group

The screenshot displays the 'Manage Recommendations' interface. At the top, there is a back arrow, the title 'Manage Recommendations', and a 'Back' button. Below the title, it shows '1 - 20 of 71' items, '0 rows selected', and a 'Remove selected' button. A filter bar includes 'Select All', 'Category: All', 'Status: Active', 'Library: All', and 'Assign to: All'. The main content area lists three recommendations:

- 1 High Request Load for "How to win friends and influence people / Dale Carnegie." title**  
Category: High Request Load  
Created on: 02/02/2020  
Updated on: 02/02/2020  
Updated by: System  
Notes: 0  
Attachments: 0  
Description: Multiple patron physical requests were placed on How to win friends and influence people / Dale Carnegie.. The time until an item became available was relatively long.  
Number of orders (last year): 1, Number of requests (last year): 9, Number of items: 3, Average number of days to available: 5  
Recommendation: I recommend reviewing the title to potentially reduce patron waiting time: you may want to modify terms of use, move items to a short loan location or purchase additional copies.
- 2 Load usage data from Newsbank vendor**  
Category: Load Usage Data  
Created on: 03/04/2019  
Updated on: 01/29/2020  
Updated by: ex\_l\_impl  
Notes: 0  
Attachments: 0  
Description: Your institution activated 1 collections from Newsbank, which is an Alma Certified SUSHI vendor.  
Recommendation: I recommend harvesting usage data from this vendor. Other institutions successfully harvested usage data from this vendor.
- 3 Automatically harvest usage data from EBSCO Host (EBSCOHost) (https) vendor**  
Category: Automatic Usage Data  
Created on: 03/04/2019  
Updated on: 01/29/2020  
Updated by: ex\_l\_impl  
Notes: 0  
Attachments: 0  
Description: Your institution uploaded 17 manual COUNTER file(s) with platform(s): ebscohost  
Report Type: BR1, Release: R4  
Recommendation: I recommend SUSHI harvesting with EBSCO Host (EBSCOHost) (https) instead of manual file uploads. Other institutions successfully harvested usage data from this vendor.

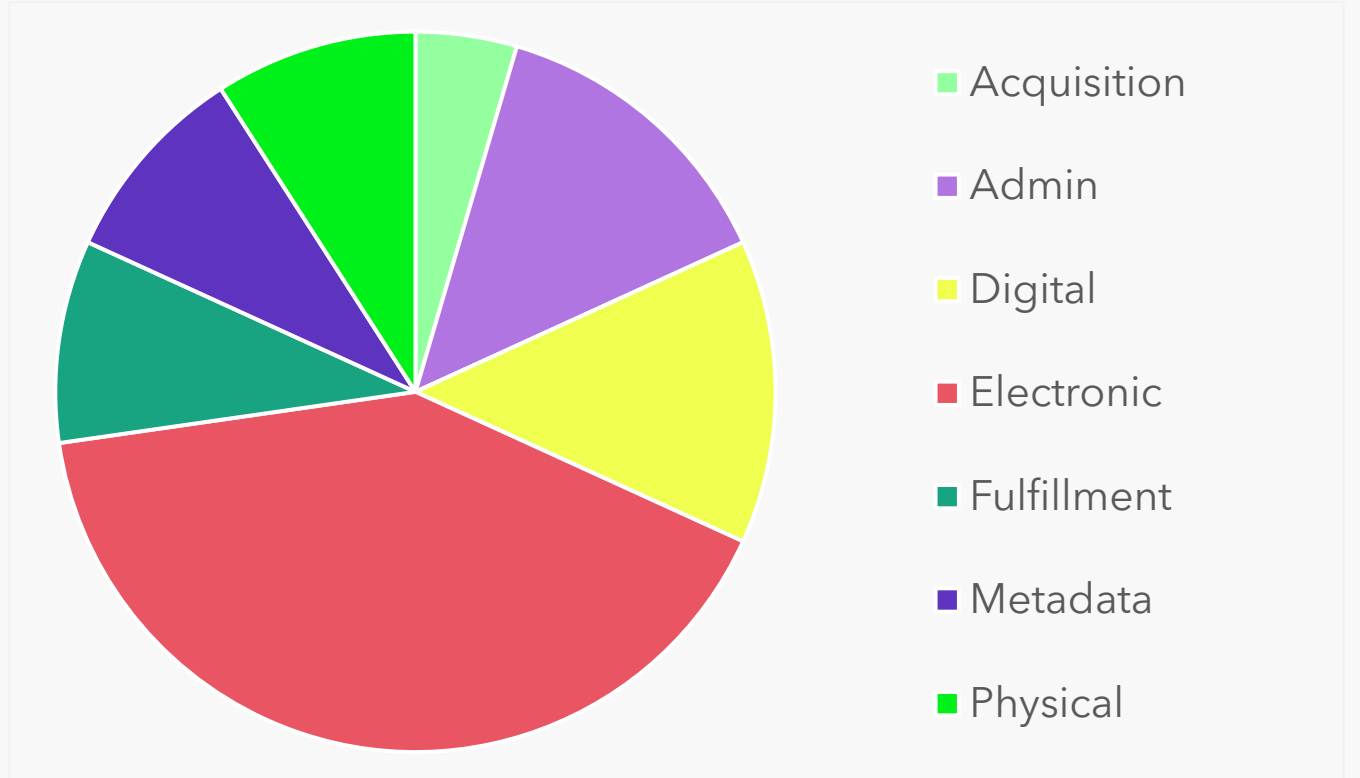
# DARA Today

## Last Year Usage Statistics

○ Recommendations: **128,263**

○ **35%** of them were implemented

○ **~91%** of institutions implemented recommendations



# Library Analytics Expanding On All Fronts

**Collect**

Expanding Analytics scope: internally and externally!

**Explore**

More integrated and more powerful interface

**Insight**

Starting with out-of-the-box DV based dashboards

**Action**

DARA. Additional data-based recommendations as a start

# Takeaways



More integration

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From insightful visualization to smart action

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The first step: collection development

# A discussion about Collection Development

Want to join the discussion?

Join us and become a potential participant for user studies and testing of collection development reports and features

**When?**

Tomorrow. Wednesday 13/9/23, 10:20 -11:00 AM

**Where?**

Agora Learning Center, 01.A03 Athens





# Thank You!

[Raphael.Gabbay@clarivate.com](mailto:Raphael.Gabbay@clarivate.com)

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