Mini Case Studies: Using Alma Analytics and Data Visualization for Policy Refinement

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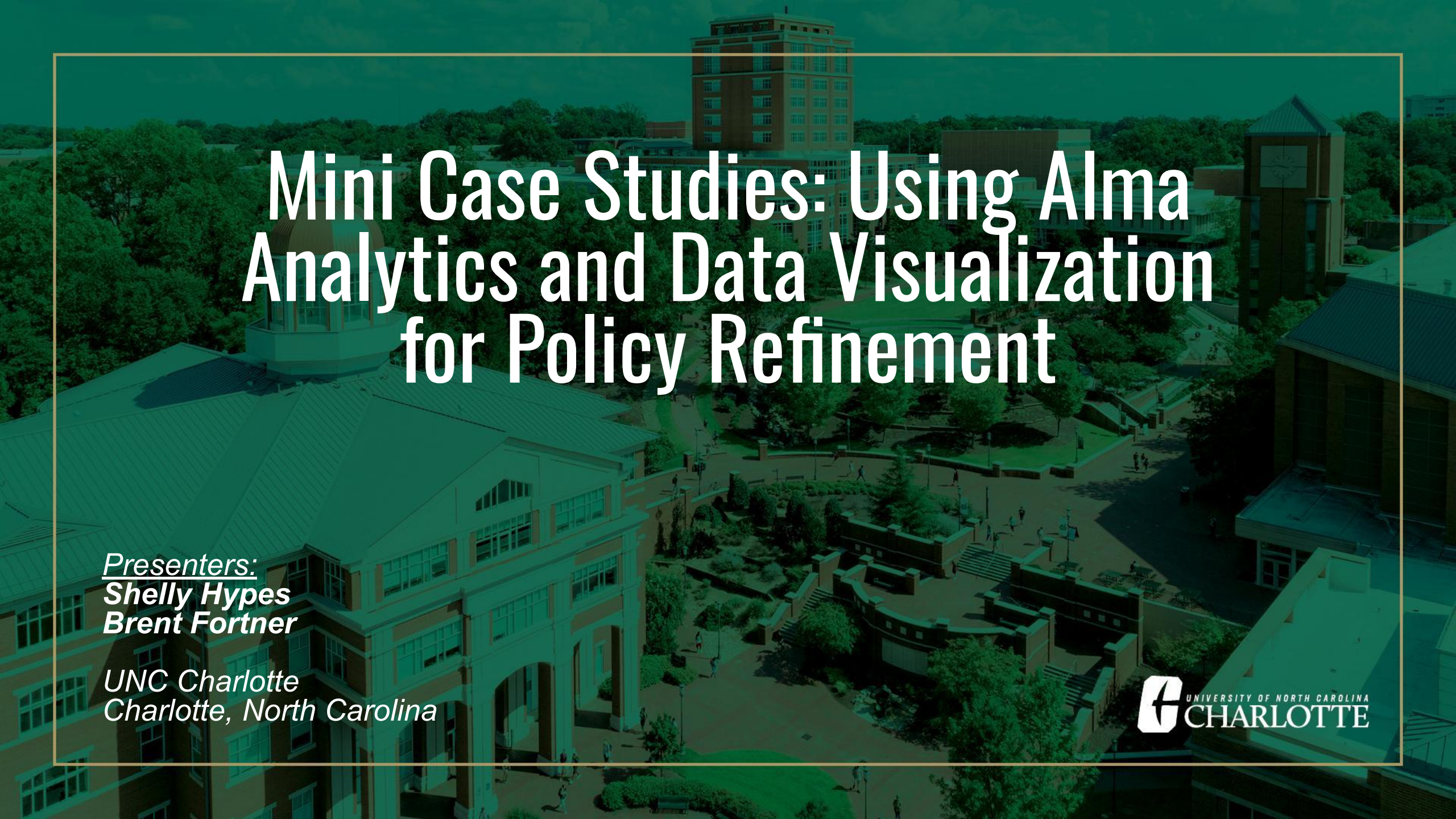
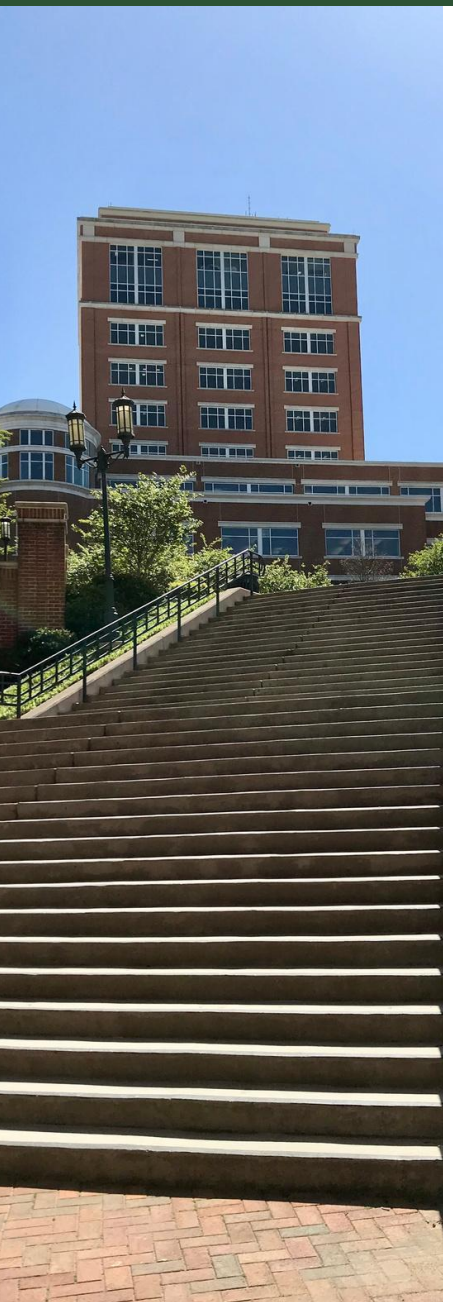
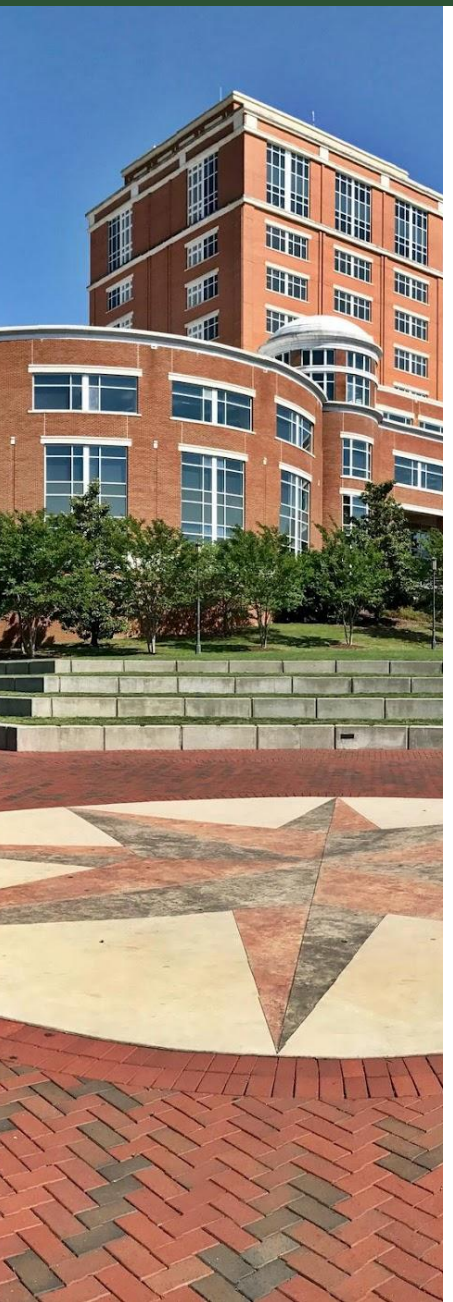




About UNC Charlotte

- Charlotte, North Carolina - USA
- Enrollment approximately 30,000
- Atkins Library, Architecture Library, and Offsite Storage Facility
- Alma, Primo VE, RapidILL, Library Mobile App



Analytics and Data Visualization (DV)

- Learning as we go!
- Not experts, but we like this work!

Today

- **Three Case Studies**
  - TouchNet Payment Integration
  - Equipment Audit
  - Laptop Return Rates and Fines
- **Goals**
- **Analytics/DV Reports and Results**
- **Questions and Anomalies**
- **What changed at our library as a result of this data?**

Case Study #1: TouchNet Integration

- Could we simplify a cumbersome process with varying restrictions?

Background

- Difficulties tracking online payments
- Only certain individuals permitted to accept payments
- Collaboration between the library, university eCommerce, and Ex Libris was needed

Reports

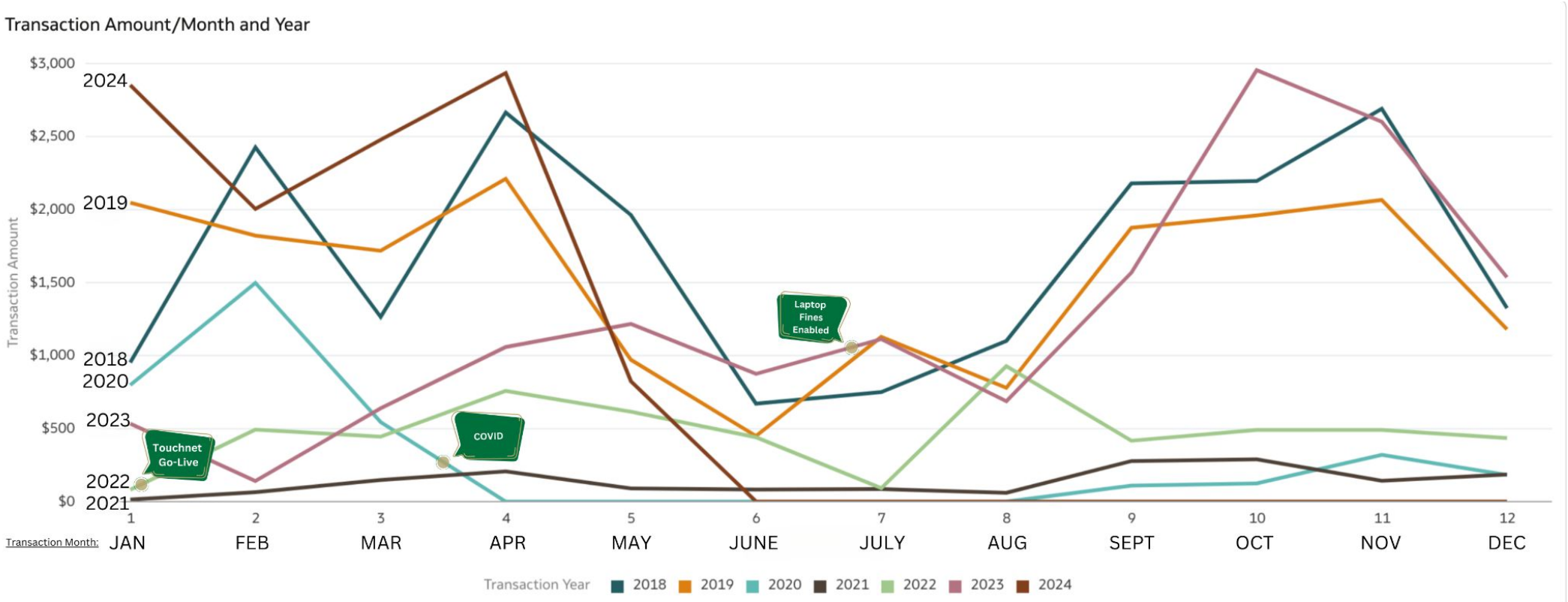
- Payment Activity Report–7 days & 30 days

Payment Activity Last 7 Days

Transaction Date	Original Amount	Transaction Amount	Fine Comment	Fine Fee Additional Transaction Id	Fine Fee Creation Date	Fine Fee Type	Payment Method
7/26/2024	50.00	50.00	Date generated: 07/22/2024, Due: 07/14/2024, Fine Policy/ies: Overdue fine policy: $10 Daily Overdue , Action: Item was returned	13554010004091	7/22/2024 10:38:43 AM	Overdue fine	Credit/Debit Card
	18.00	18.00	Large Format Print Color; 3 Linear Feet at 18 per Linear Feet. Created by user: jowusu3	20240726000391	7/26/2024 2:29:21 PM	Tech Project	Online
	24.00	24.00	Large Format Print Color; 4 Linear Feet at 24 per Linear Feet. Created by user: asantosh	13544010004091	7/25/2024 4:05:17 PM	Tech Project	Credit/Debit Card
	24.00	24.00		20240726000049	7/25/2024 4:05:48 PM	Tech Project	Online

Case Study #1: TouchNet Integration

- Data Visualization



Case Study #1: TouchNet Integration

Results

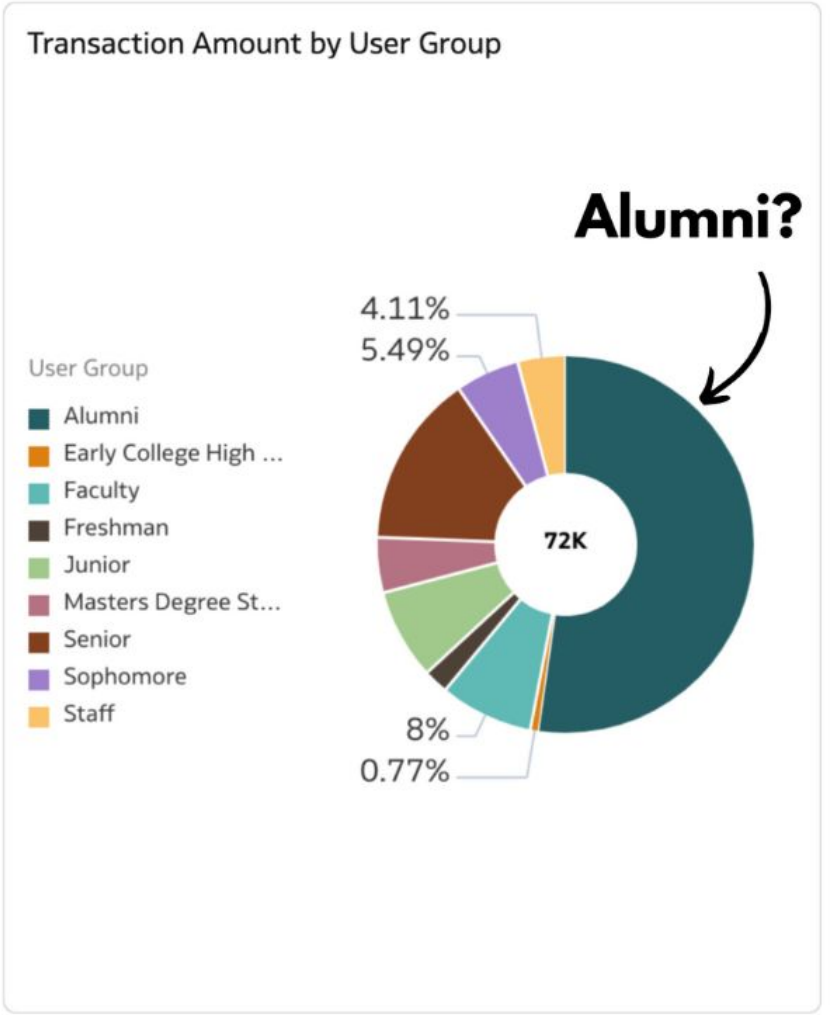
- Payments now reconciled automatically
- Changes in payment tracking and reporting

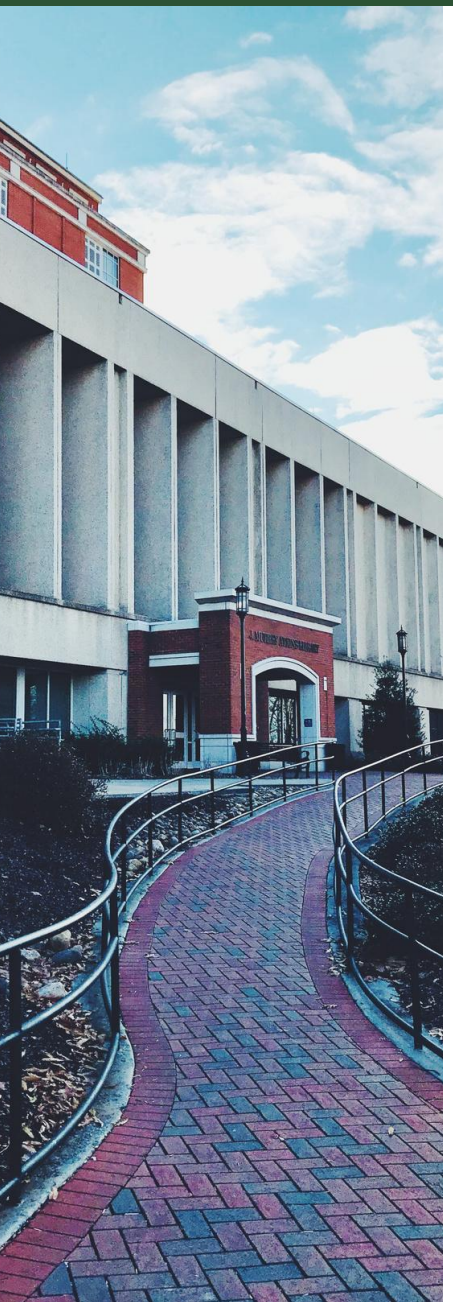
Questions & Oddities

- Alma/Touchnet information cutoff
- Alumni User Group

Strategic Decisions

- Integration is justified based on usage stats. Continue using the TouchNet integration.
- Considering online only payments at secondary service point.



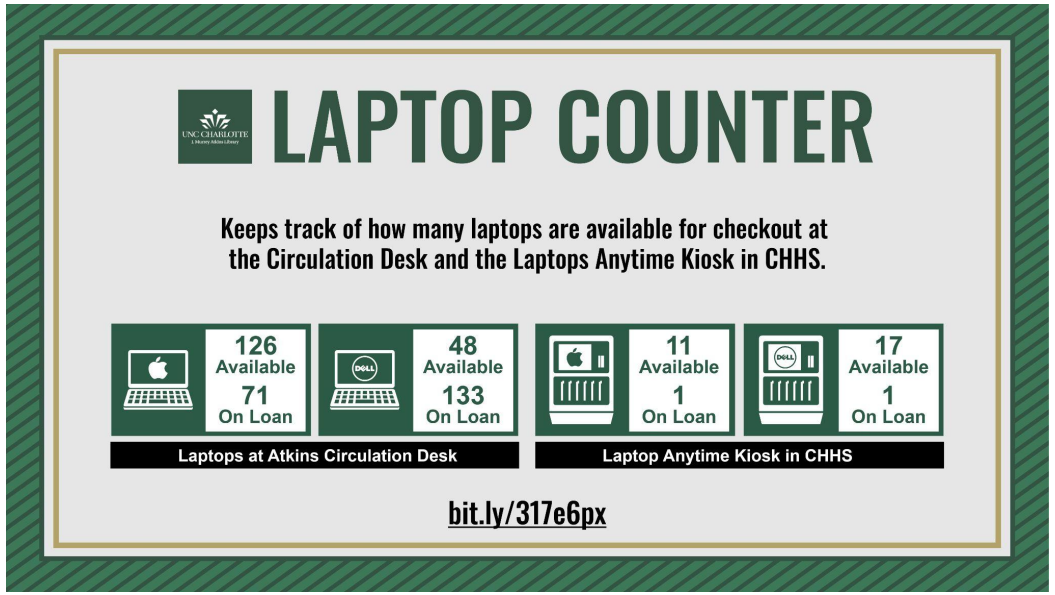


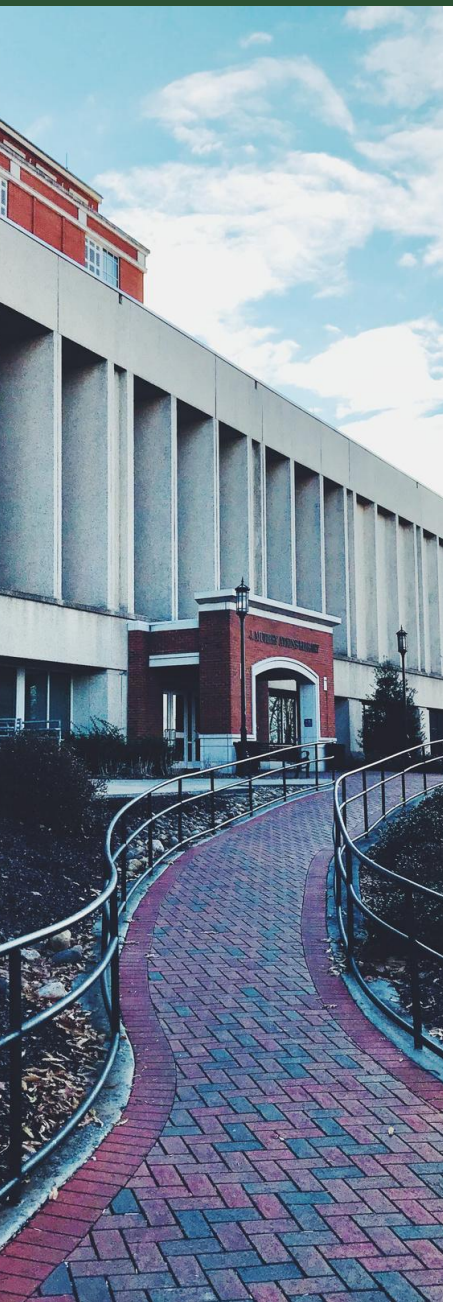
Case Study #2: Equipment Audit

- How many laptops do we actually have?
- How many laptops are in the library at a specific time?

Background

- Laptops move around a lot — difficult to count.
- We had never completed an equipment audit before.





Case Study #2: Equipment Audit

Reports

- Equipment Audit Dashboard

Equipment by Location | Active Loan Details

Location Name: Adapting Tech Gra

Apply | Reset

Equipment Audit

Library Name	Location Name	Title	Description	Barcode	Base Status	Replacement cost	Lifecycle
Atkins Library	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368916	Item not in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368917	Item not in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368924	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368925	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368927	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368928	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368929	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368930	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368931	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368932	Item in place	200	Active
	Adapting Tech Grant IRD	Lepow C2 series portable display.	Lepow Portable Display	1001368937	Item in place	200	Active

Location Name: Adapting Tech Gra

- Reserves--1 HR
- Reserves--1st Floor Circulation Desk 1 HR
- Reserves--1st Floor Circulation Desk 24 HR
- Reserves--1st Floor Circulation Desk 3 Days
- Reserves--1st Floor Circulation Desk 3 HR
- Reserves--1st Floor Circulation Desk 7 Days

Search...

Item Location at Time of Loan: Mac--1st Floor Cir

Apply | Reset

Borrower First Name: Library IT

Apply | Reset

Case Study #2: Equipment Audit

Results

- Staff can quickly check for discrepancies in inventory
- Allows library staff to track down missing items faster and more efficiently
- Compliant with university audit processes and procedures

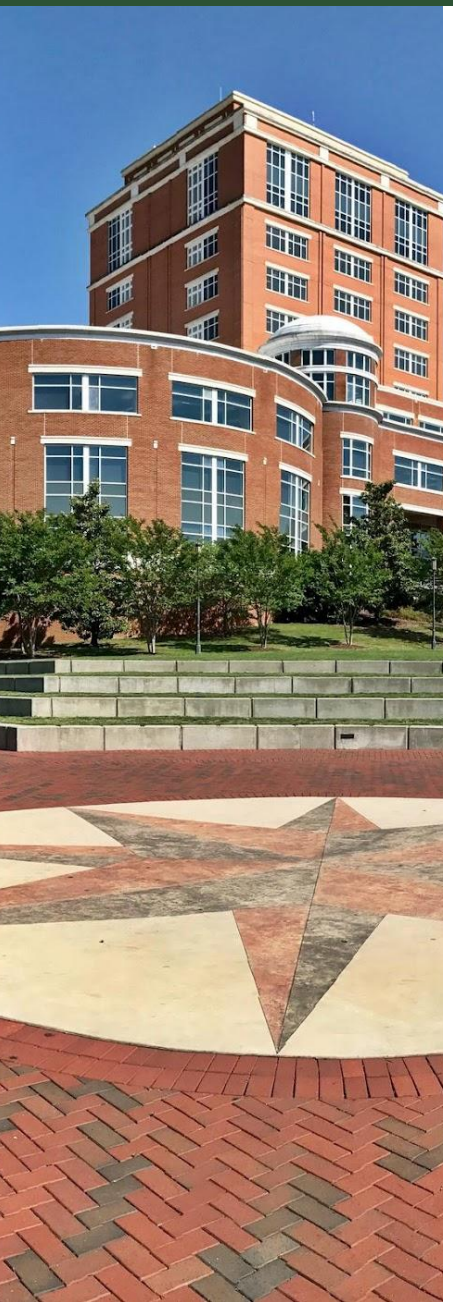
Questions & Oddities

- Analytics Lifecycle Status
- Providing accurate counts while items are on loan

Strategic Decisions

- Initial university audit led to a bi-annual library audit to ensure accuracy of collections.

Lifecycle	Indicates whether the item is active or deleted	The following are possible values: • Active – the item is active • Deleted – the item was deleted • None – the item has a holding record, but not an item record

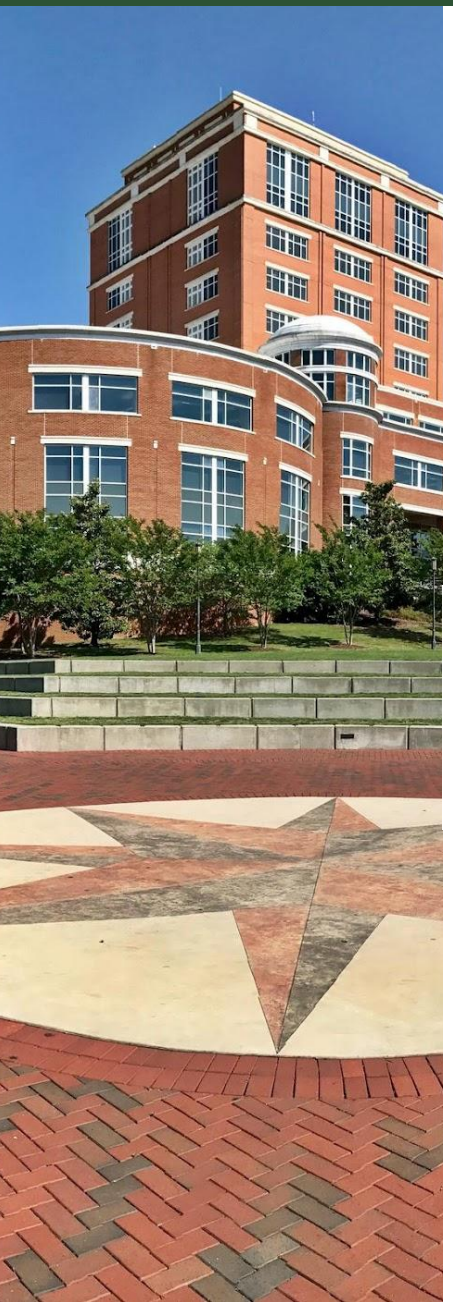


Case Study #3: Laptop Return Rates and Fines

- Were new overdue fine policies encouraging students to return their laptops?

Background

- Long term laptop loans and fine forgiveness during COVID-19 pandemic
- As library services and operations returned to normal, rate of laptop returns decreased
- Lost laptops must be billed, creating extra work for library staff
- Missing equipment hinders ability to properly serve patronbase



Case Study #3: Laptop Return Rates and Fines

Some students weren't returning their laptops.

Items Returned Late & Amount of Time Overdue

Equipment Category, Amount of Time Overdue upon Return, & Total Checkouts

Category	< 1 Hour	1-3 hours	4-23 hours	1-2 days	3-7 days	8-14 days	15-29 days	30-99 days	Grand Total
Apple Pencil			10	12	7	3		1	33
Architecture	1		9	3	3		1	1	18
Cable / Adapter	46	15	136	77	104	45	43	33	499
Calculator	30	16	80	41	37	6	11	11	232
Camera / Camcorder / Webcam a..			19	12	16	5	6	6	64
Gaming Controller / Console	45	17	47	2	5				116
Gaming Headset	4	2	3	5				2	16
Headset / Headphones	82	26	76	9	11	2	3	3	212
Hotspot	1		25	17	27	11	12	16	109
iPad			10	12	5	3		1	31
Laptop - Employee				1					1
Laptop - Student	8	1	232	161	217	115	128	91	953
Laptop Charger	34	20	180	117	147	85	92	65	740
Microphone			6	8	4		2	1	21
Phone Charger	11	10	27	19	11	6	2	3	89
Projector & Projector Screen			6	3	6	2	3	2	22
Raspberry Pi	1			1	3	1	1		7
SD Card / Card Reader			16	7	18	4	7	9	61
Self-Care			4	1	3				8
Study Room Equipment	19	9	14						42
Tripod			3	3	4	1	1	4	16
USB Flash Drive	8	4	13	6	4	1	1	2	39
Other			1	4	1	3	2		11
Grand Total	290	120	917	521	633	293	315	251	3,340

Home

Loan Policy
All

Equipment Category
All

Shelving Location
All

College or Unit
All

Borrower Category
All

Count of Equipment Chec..
1 232

Checkouts from July 1, 2022 - January 31, 2023

Return & Overdue Status determined as of 2/1/2023 @ 8:00 AM

Case Study #3: Laptop Return Rates and Fines

Results

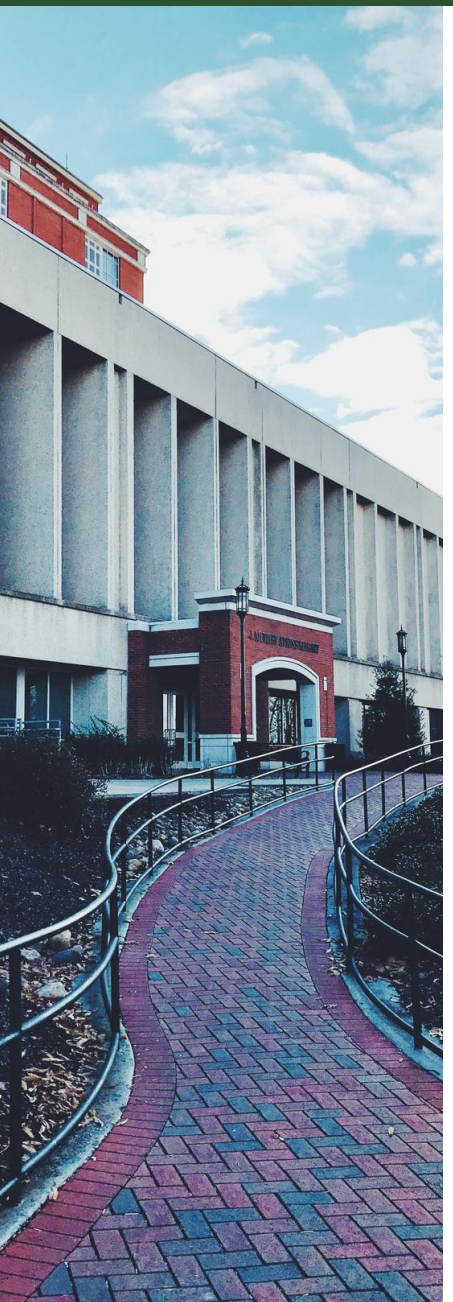
- Students are returning their laptops on time and taking advantage of the grace period. Good news!

Questions and Oddities

- Would a Bursar integration make this process easier?
- Students still request the semester-long laptop loan.

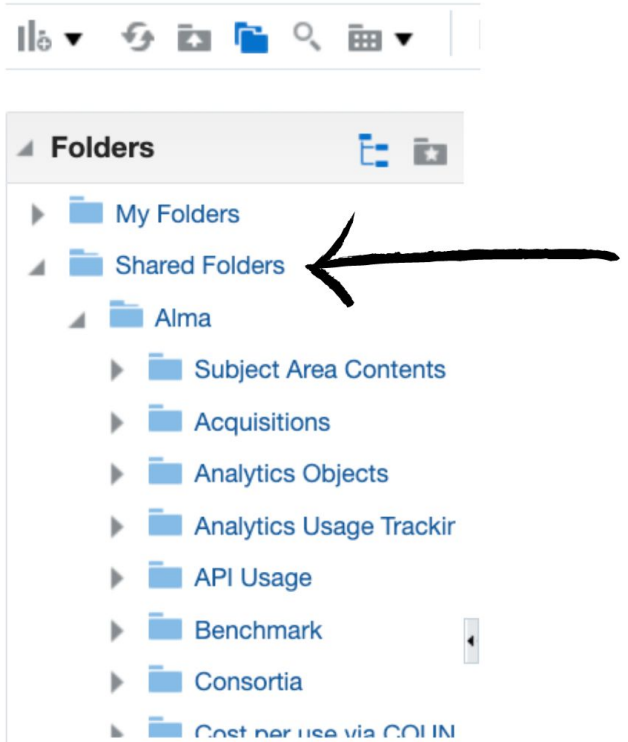
Strategic Decisions

- Continue enforcing laptop fines to ensure equitable access.



Resources

- Alma Insights: Data Visualization
- Alma Analytics Subject Areas
- Presentations and Documents: Analytics
- Alma Analytics: Become an Expert Series
- Premium Workshops
    - Alma Analytics: Basics Workshop
    - Alma Analytics: Advanced Workshop
- ELUNA Document Repository
- Analytics Shared Folders



Questions?

Thank you!

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