

# Alma Analytics: Latest Developments & What's Next



# Agenda

**Out of the box Reports Revamp**

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**Data Visualizations Latest Releases**

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**Counter R5.1**

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**Community**

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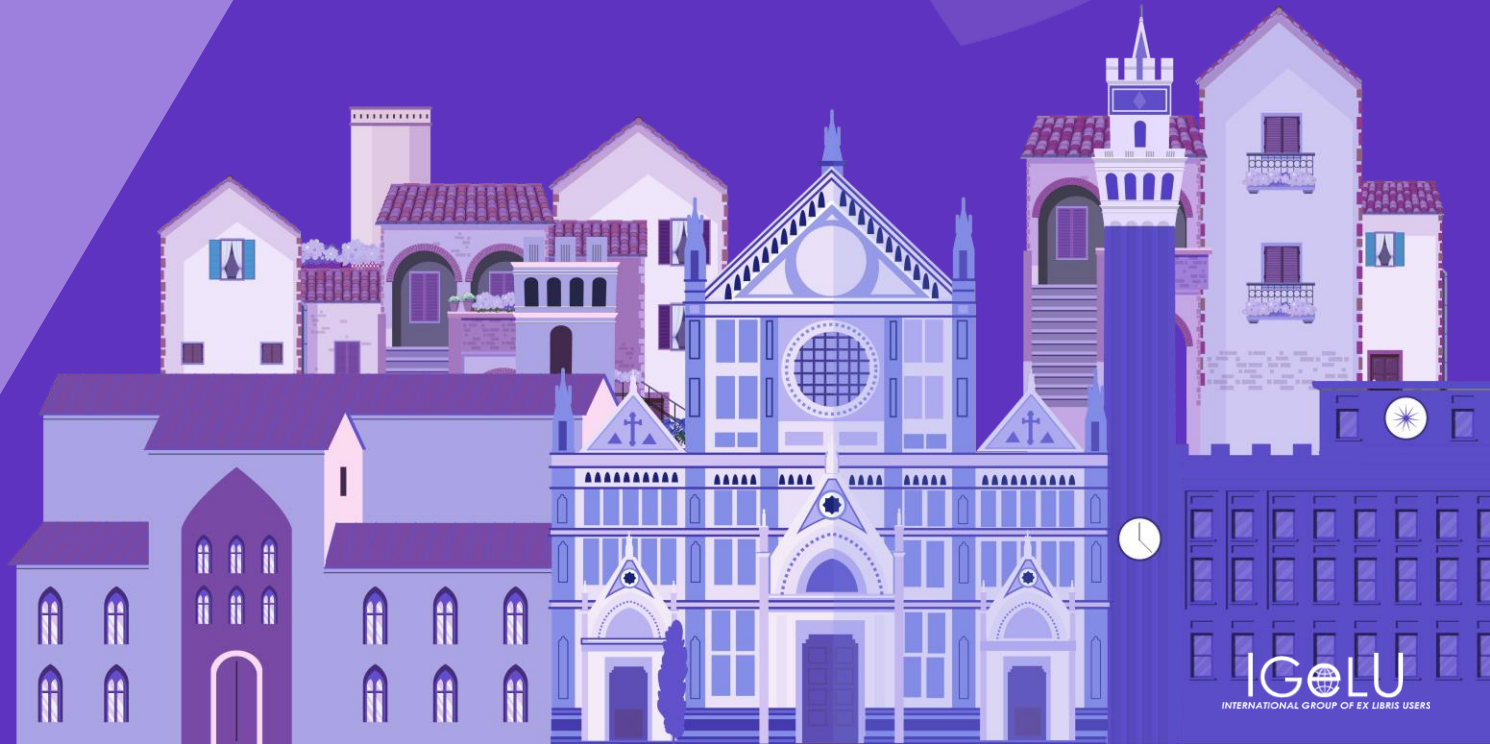
**Looking Ahead**

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**Consortial Analytics**

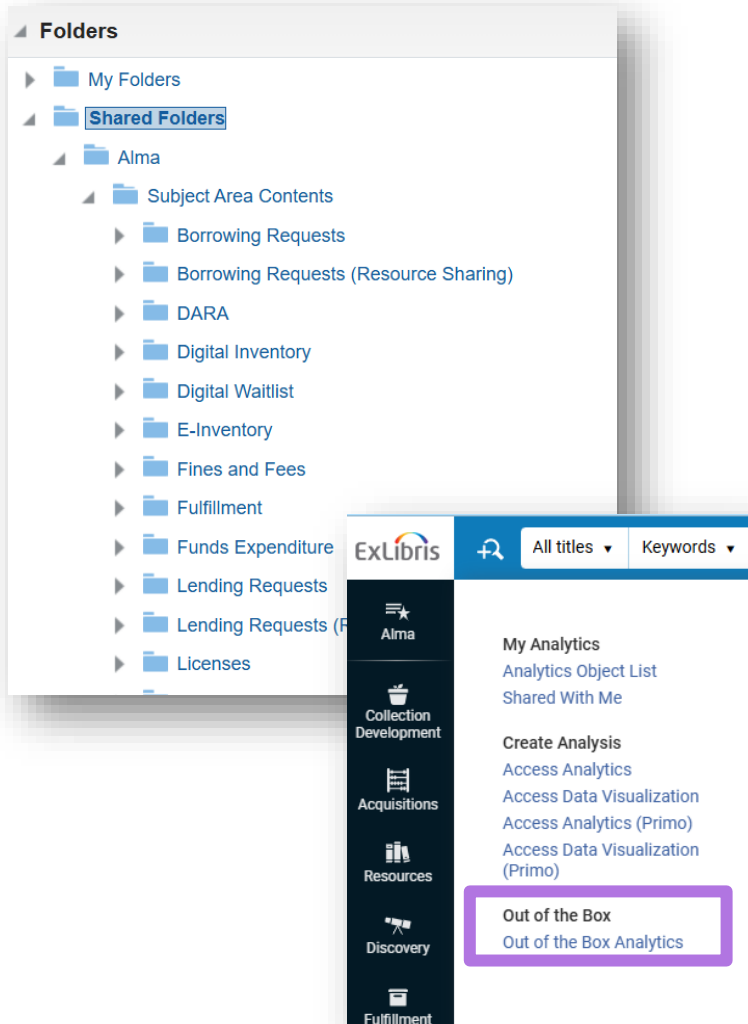
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# Out-of-the Box Reports Revamp



# More Useful, More Relevant. Less Clutter

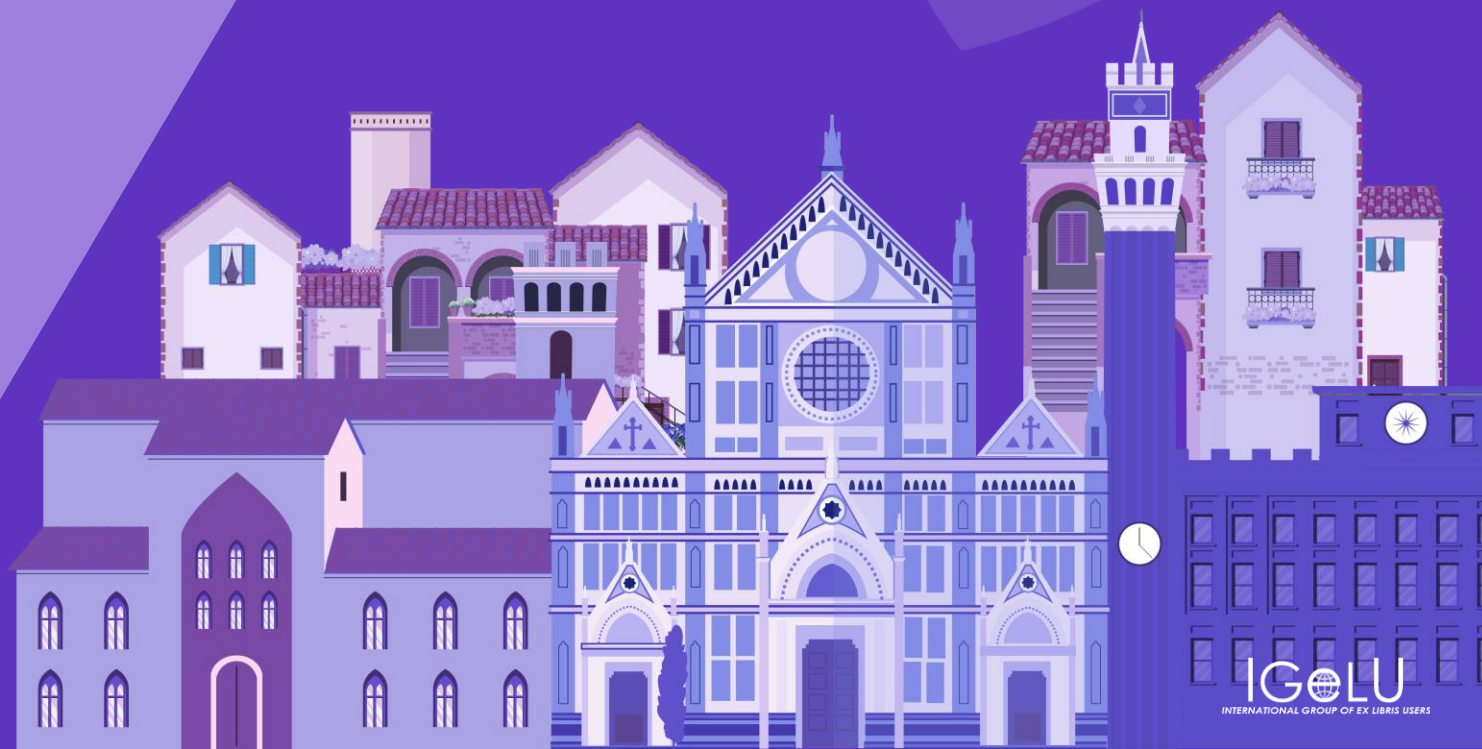
## Revamping The Alma Canned Reports Catalog



- Usage Analysis on Existing Reports
- Reorganize Catalog:
  - Refresh folder arrangements
  - Alignment with OTB object list in Alma
- Improved UI/UX of existing reports and refined business questions
- Ongoing introduction of new data visualization reports

# Data Visualizations Latest Releases

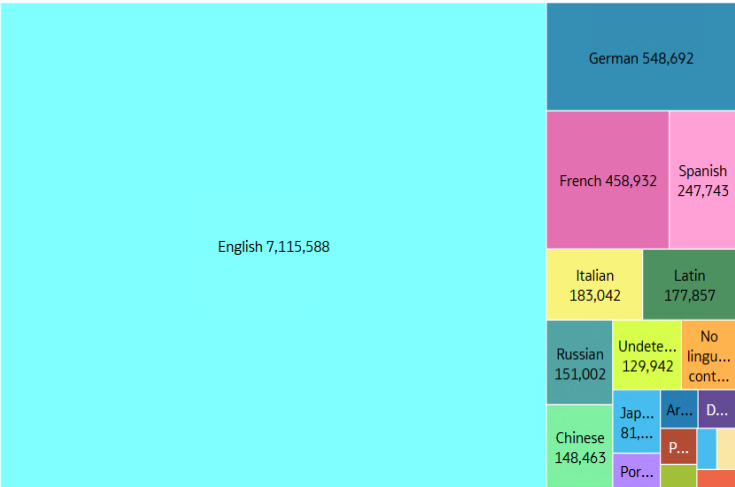
Collection Development  
Electronic Resources



# Bibliographic Record Distribution

## By Language

Top 20 Language in Collection



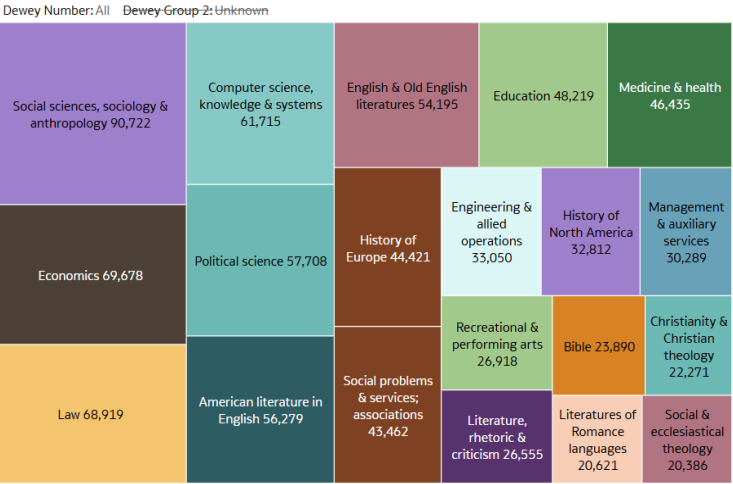
## By Place of Publication

Top 20 Publication Countries in Collection



## By Classification

Top 20 Dewey Classifications in the Collection



### Bibliographic Records Distribution by LC and Dewey Classifications

This dashboard shows the most prominent Library of Congress (LC) and Dewey classifications in the catalog, highlighting the distribution of different areas of knowledge across the collection. Users can filter and analyze the data to see how well the library's holdings align with various fields of study and research interests. The dashboard includes all active titles in the library.

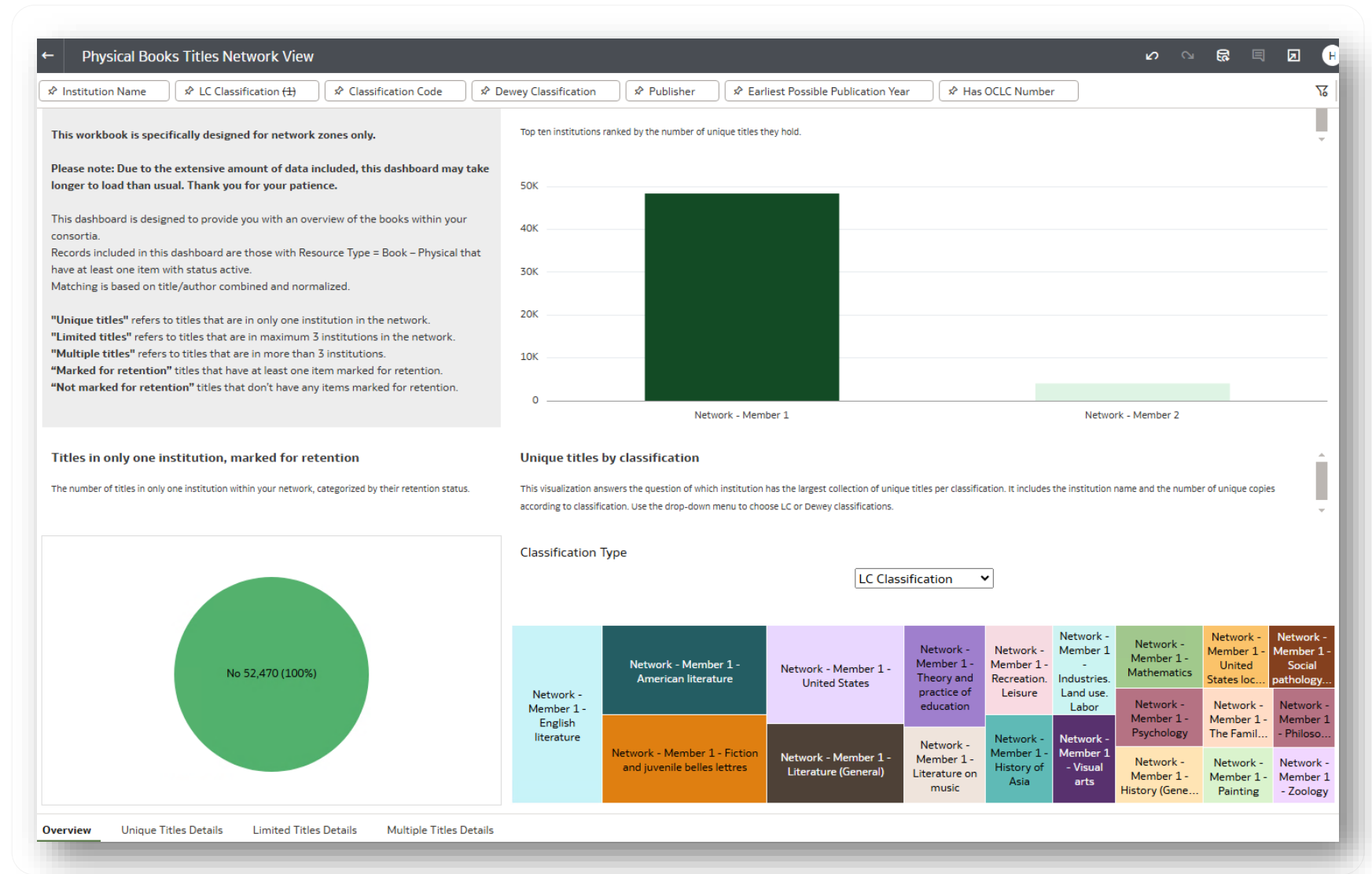
### Bibliographic Records Distribution by Language and Publication Place

This DEI Dashboard represents the variety of languages in which the library's titles are available, highlighting the linguistic diversity of the collection. It also maps out the countries where these titles were published, offering a global perspective on the library's resources. Users can filter and explore data to see how well the collection represents different cultures and regions. The dashboard includes all active titles in the library.



# Physical Books Titles Network View

Unique copies per member and classification



# Physical Books Titles Network View

Create Actionable Lists for further collaboration

←Physical Books Titles Network View

✧ Institution Name✧ LC Classification (±)✧ Classification Code✧ Dewey Classification✧ Publisher✧ Earliest Possible Publication Year✧ Has OCLC Number⊕

Please note: Due to the extensive amount of data included, this dashboard may take longer to load than usual. I thank you for your patience.

Possible action: Use this list to create a set of items to be marked for retention.

Number of Unique Titles

52,363

Top 10 Unique Titles by LC Classification

LC Classification	# of Titles
United States	2,534
Literature (General)	2,042
Theory and practice of education	1,515
United States local history	1,191
History of Asia	1,189
Literature on music	1,135
Recreation. Leisure	1,075

Top 10 Unique Titles by Dewey Classification

Dewey Classification	# of Titles
Social sciences	11,356
Literature & rhetoric	7,923
History & geography	7,911
Unknown	6,086
The arts; fine & decorative arts	5,882
Natural Sciences and Mathematics	4,230
Technology	3,137

To create an actionable list and improve performance, use the additional set of filters provided to narrow your query. Note: You must select at least one institution from the filter below to create the list.

Institution Name

LC Classification

Dewey Classification

Is marked for retention

In active course

Apply

0, Network - Member 1, Network - Me...

Recreation. Leisure

All

All

All

Unique Titles Details

Number of Records: 1,096

Title (Complete)	Institution Name	MMS id	Number of items for MMSID	ISBN	OCLC Control Number (035a)	Edition Simplified (Combined)	Publisher	Begin Publication Date	LC Classification	Dewey Classification Top Line	Dewey Classification	In active course	Is marked for retention	Retention reason
100 lessons in classical ballet / Vera S. Kostrovitskaya ; translated by Oleg Briansky.	Network - Member 1	991159100000541	1	0879100680; 9780879100681	15014916	1	Limelight Eds	1987	Recreation. Leisure	792	792.8/2/07	No	No	
12 lessons to better golf.	Network - Member 1	999346900000541	1				Prentice-Hall	1953	Recreation. Leisure	796	796.35 T95t	No	No	
25 years of American dance / [Editor: Doris Hering.	Network - Member 1	9912619100000541	1				Dance Magazine; R Orthwine	1954	Recreation. Leisure	793	793.3	No	No	

Overview

Unique Titles Details

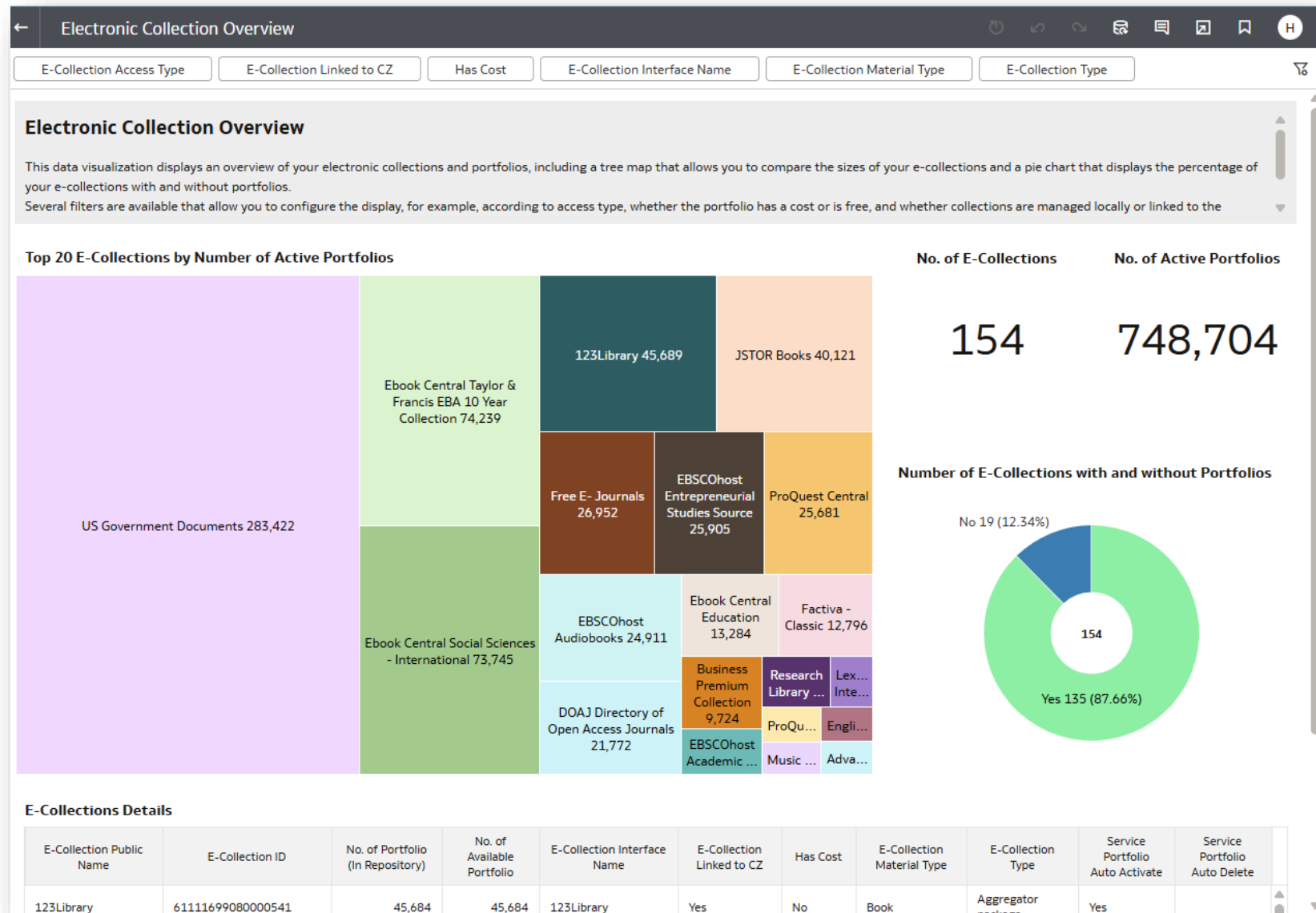
Limited Titles Details

Multiple Titles Details



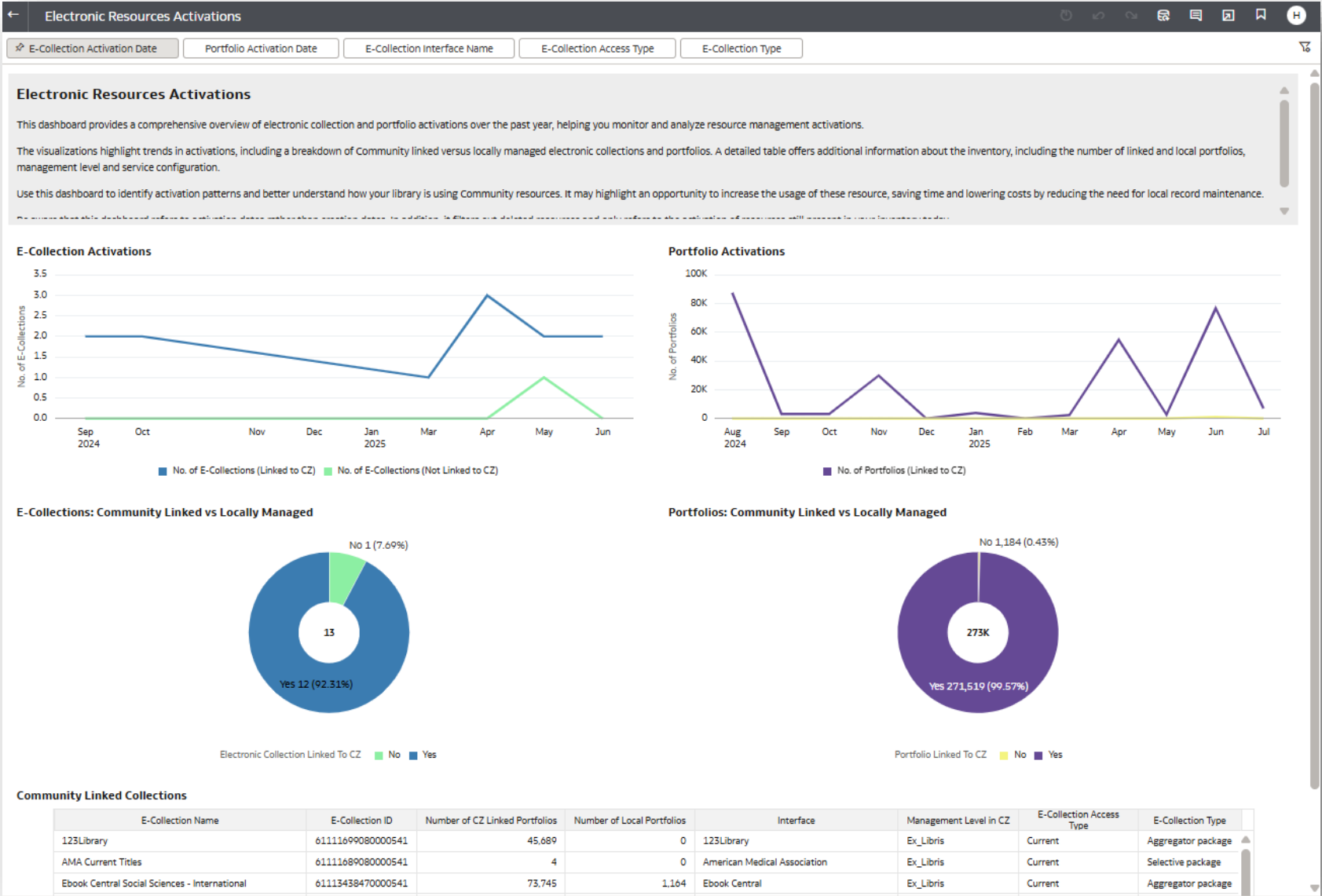
# Electronic Collection Overview

Create Actionable Lists for further collaboration



# Electronic Resources Activations

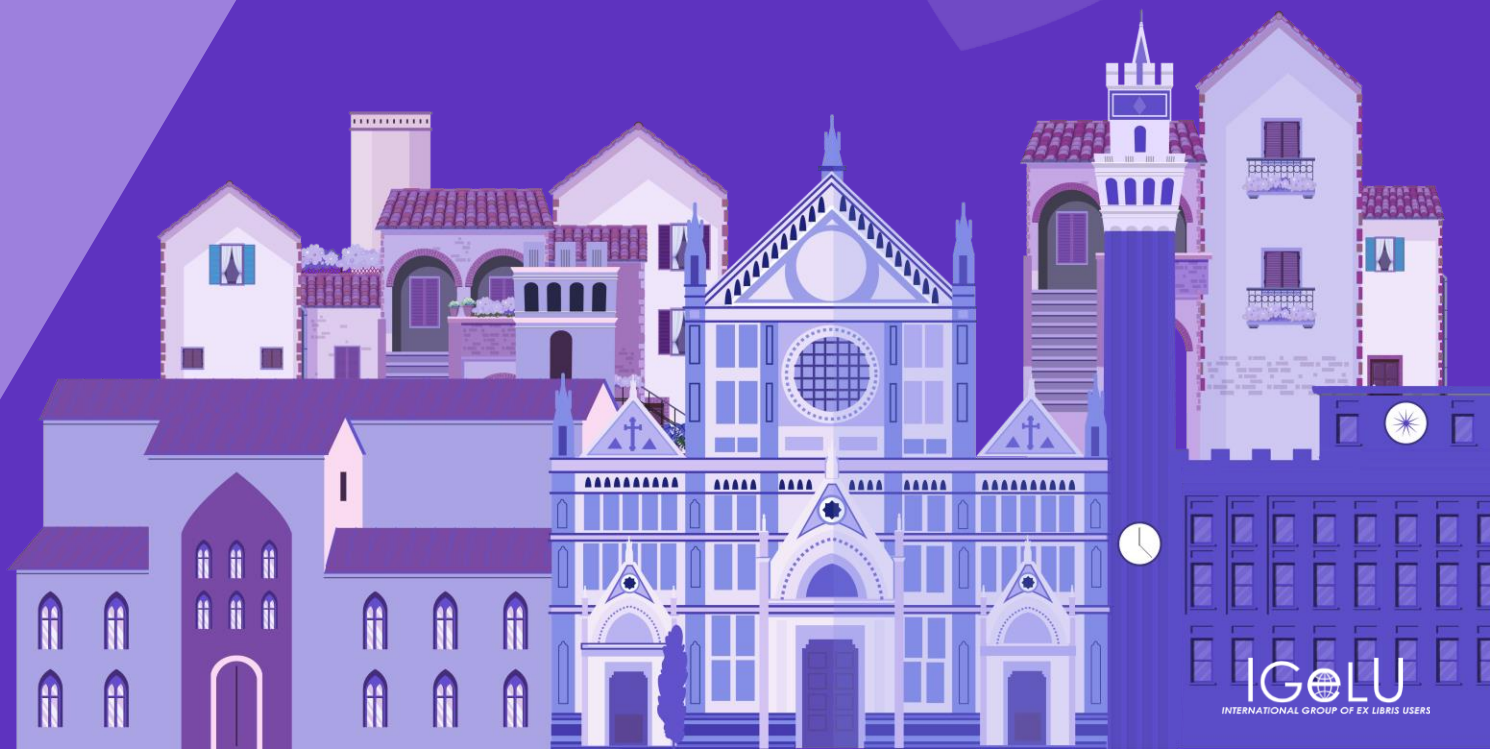
Create Actionable Lists for further collaboration



Coming  
Soon!

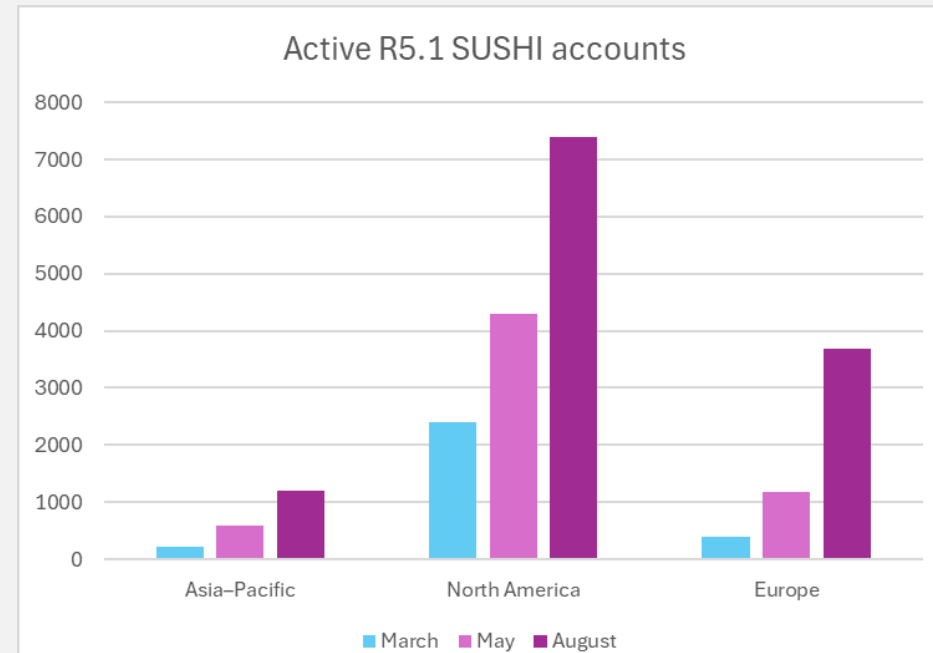
# Top Electronic Collections by Link Resolver Activity

# Counter R5.1



# Counter R5.1

- Development was done in February 2025
- Adoption rate is high
- ~12000 active R5.1 SUSHI accounts



Certified SUSHI  
Vendors in the Alma  
Community Zone



Unique contributing  
vendors:

**182**



## What's Next?



### **Planned Idea Exchange -**

Support "Parent" fields in  
COUNTER R5.1 Reports for  
item level reporting



# Community

Collaboration with The Analytics CoP

User Feedback

Idea Exchange



# 30 fields for Holdings Local Parameters

- Physical Items Subject Area
- Raised by the Analytics Community of Practice

The screenshot displays a user interface for configuring data fields. On the left, a scrollable list contains 10 items, each with a blue grid icon and a text label:

- 908 - Holding Local Param 01
- 909 - Holding Local Param 02
- 920 - Holding Local Param 03
- 977 - Holding Local Param 05
- 972 - Holding Local Param 06
- 014 - Holding Local Param 07
- 583 - Holding Local Param 08
- 966 - Holding Local Param 09
- 843 - Holding Local Param 10

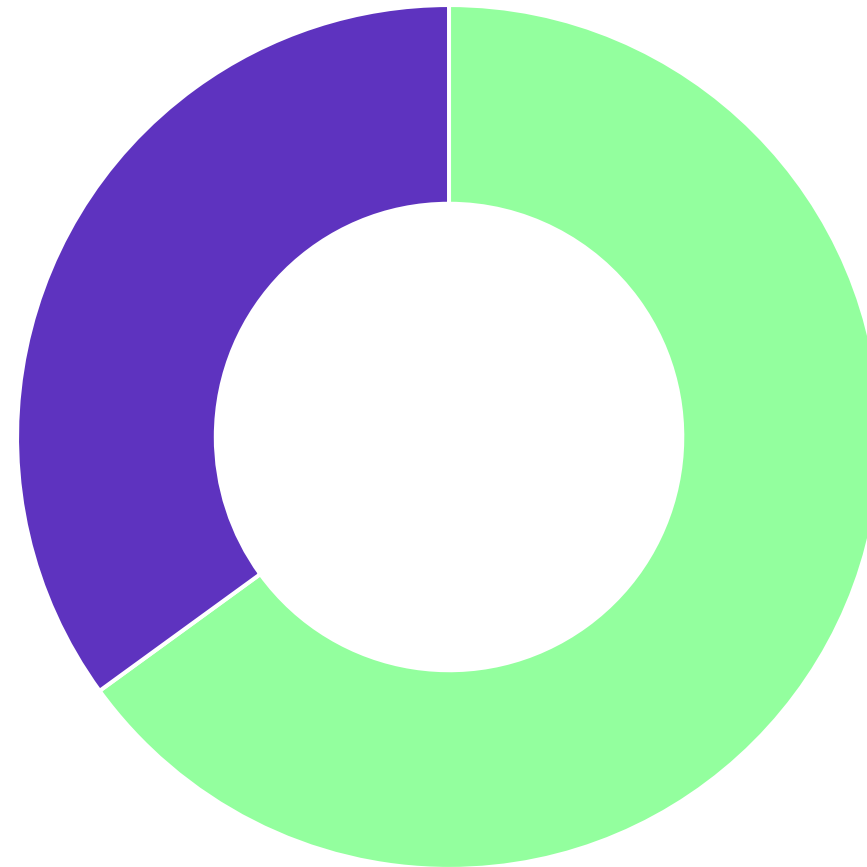
On the right, a panel titled "Selected Columns" is shown. It contains a section labeled "Holding Details" which lists two selected parameters, each with a gear icon for configuration:

- 908 - Holding Local Param 01
- 909 - Holding Local Param 02

Below the "Selected Columns" panel, a section titled "Filters" is visible.

# Analytics Display Local Params

Discussed with the  
Community of  
Practice and will turn  
this flag on for all  
libraries



False True

# Data Dictionary

Ongoing Analytics Documentation Enhancement

Reporting Code					
Field ▲ ▼	Description ▲ ▼	Field Location in Alma ▲ ▼	Additional Information ▲ ▼	Data Type ▲ ▼	Data Size ▲ ▼
Reporting Code - 1-5	Five fields that store the reporting codes.	Configuration > Acquisitions > Purchase Orders > 1-5 Reporting Codes	You configure multiple values for each reporting code field at Configuration > Acquisitions > Purchase Orders > 1-5 Reporting Codes. Then you select one code per field for a PO line when you create or edit the PO line. For more information, see <a href="#">Manually Creating a PO Line</a> . Analytics displays the code you selected for each PO line.  The label in Alma is Code.	VARCHAR	255
Reporting Code Description -1-5	Five fields that store the description of the five reporting code fields.	Configuration > Acquisitions > Purchase Orders > 1-5 Reporting Codes	You configure descriptions for the values of each reporting code field at Configuration > Acquisitions > Purchase Orders > 1-5 Reporting Codes. Then you select one code per field for a PO line when you create or edit the PO line. Analytics displays the description of the code you selected for each PO line.  The label in Alma is Description.	VARCHAR	4000

## Subject Areas Featuring Enhanced Tables

- ☑ Funds Expenditure (Fully)
- ☑ Purchase Requests (Fully)
- ☑ E- Inventory (At work)
- ☑ Analytics Objects
- ☑ Titles
- ☑ Requests
- ☑ Course Reserves
- ☑ Fines and Fees
- ☑ Fulfilment
- ☑ Usage Data
- ☑ Digital Waitlist

# Looking Ahead



# AI Insights

## Discovery Phase

### Providing insight and exploring Reports with conversational AI



Phase 1: Provide insight and enable users to explore Analytics objects with natural language



Phase 2: Generate reports *on the fly* for specific subject areas, driven by user-defined business questions.



# The Vision: Seamless Access to Insights and Relevant Data

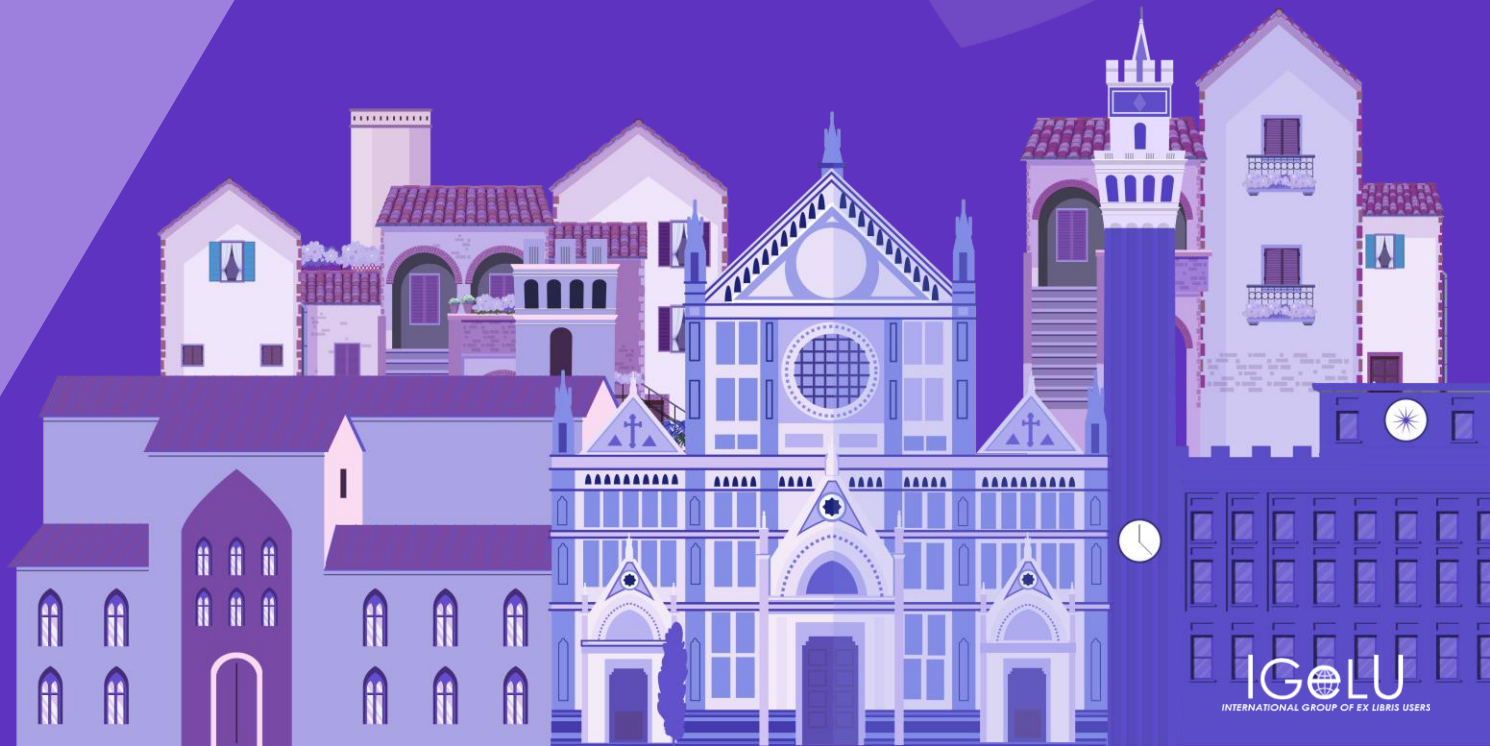
Empowered by  
Clarivate's AI Platform

The screenshot displays the ExLibris Analytics Assistant interface. On the left is a dark sidebar with navigation icons for Alma Production, Collection Development, Acquisitions, Resources, Discovery, Fulfillment, Admin, Analytics, Show MDE, and Configuration. The main content area is titled 'Shared With Me (1 - 6 of 6)' and lists six reports. The first report, 'Active Loans for Review', is selected and its preview is shown on the right. The preview includes a 'Report Preview' section with options to 'View full report' and 'Add as widget' (checked). Below this is a table titled 'Active Loans for Review' with columns: Library Name, User Primary Identifier, Barcode, Title, and Pro Sta. The table contains four rows of data. An 'Analytics Assistant' chat window is overlaid on the right side of the report preview, containing a prompt 'Ask what is right for you?' and a disclaimer: 'NOTE: Collection Development Assistant uses AI and may contain errors or omissions'. At the bottom of the chat window is a text input field with the placeholder 'What is your question?' and a send button.

Library Name	User Primary Identifier	Barcode	Title	Pro Sta
Main Library	None	39472	The price of loyalty; Tory writings from the Revolutionary era. Narrative and editing by Catherine S. Cray. Drawings by Cecile R. Johnson.	NO
		40884	The loyalists in Revolutionary America, 1760-1781.	NO
heidi.dachs		2350109752	Did you just eat that? : two scientists explore double-dipping, the five-second rule, and other food myths in the lab / Paul Dawson and Brian Sheldon.	LOS
		5591495	There is a flower at the tip of mv nose smellin me /	LOS

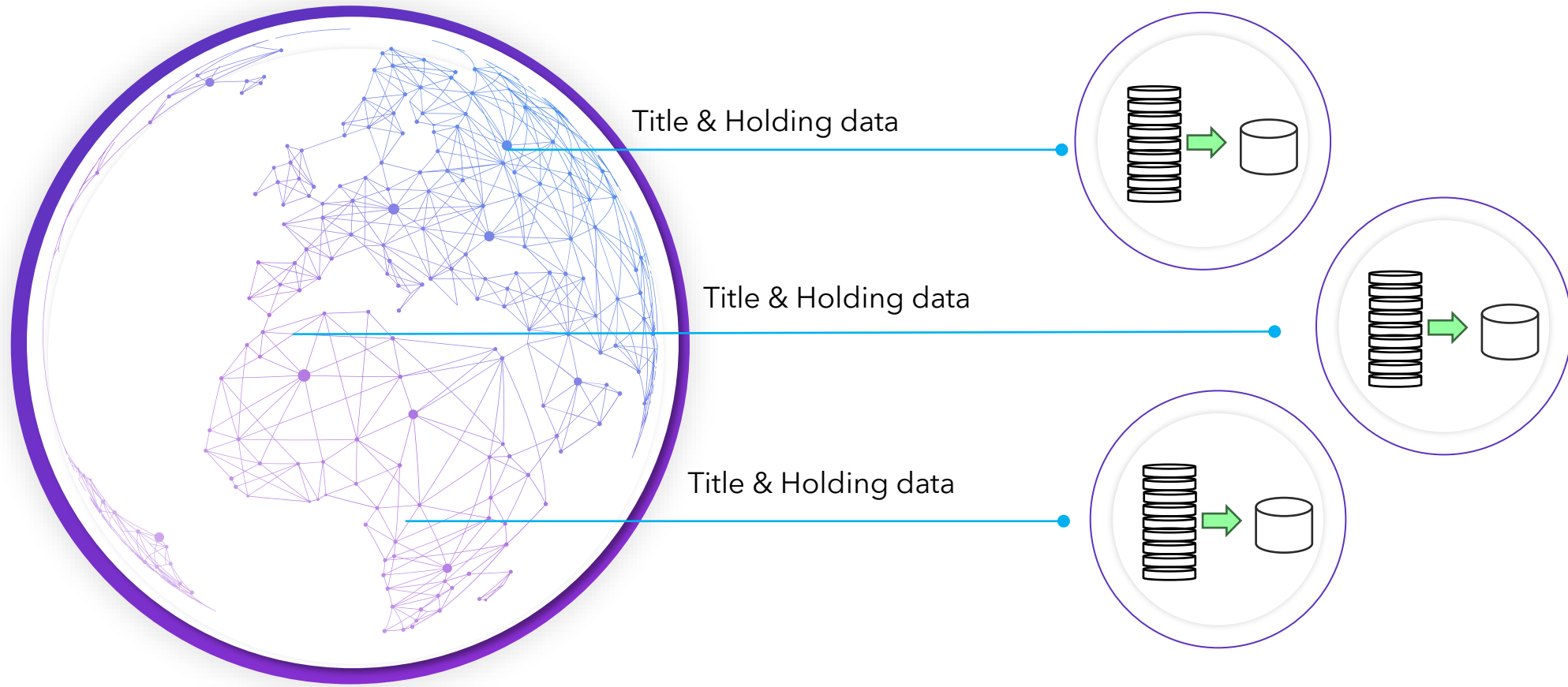
\*Conceptual image only. Does not reflect actual product plans or future developments.

# Consortial Analytics



# Consortial Analytics

Supporting Consortia members to collaborate



# Consortial Analytics

Collaborative member view



## Collaborative

- Which institutions hold similar titles in my group?
- Planning for more effective resource sharing and shared collections



## Gap Analysis

- What do other institutions hold which I don't?
- Where do I hold more resources than others?

# Consortial Analytics

- Separate Environment
- Within Alma
- Limited role-one user per institution
- OTB reports only

The screenshot displays the Alma web interface for Consortial Analytics. The left sidebar contains a menu with the following items: Alma, Acquisitions, Resources, Discovery, Fulfillment, Admin, Analytics (highlighted), Show MDE, and Configuration. The main content area is titled 'My Analytics' and includes a search bar for 'Search Analytics Objects'. Below the search bar, there are sections for 'My Pinned Analytics' (listing 'Active Loans 1-27-2020 thru 8-31-2020' and 'Books Deselection - Institution') and 'Analytics Pinned by Administrator' (listing 'General Circulation Statistics by Location'). A purple box highlights the 'Consortial Analytics' section in the left sidebar, which includes 'Book Deselection Analysis', 'Book Retention Analysis', 'Book Expansion Analysis', and 'Book Collaborative Retention Analysis'. The right sidebar shows details for the 'Books Deselection - Institution' report, including the report URL, creation/modification dates, and a 'Share' section with 'Internal Users' and 'Roles'.

# Consortial Analytics

Start by defining analysis Scope within an Alma form editor

MEMBER 1

Physical Items Keywords

Save Scope Run Analysis

Books Deselection Analysis Scope Definition

This dashboard identifies physical items within your institution for deselection. It targets books that are not committed to retention, are not part of an active course, have not been used in the past five years, and are held in at least one of your reference institutions. To run the report, begin by defining and saving your scope below. Once saved, proceed to run the report. You can further refine your search using additional filters within the dashboard.

Select Network Members

☐ Select all network members

☒ Select members from my network

Available network members are configured by the network zone administrator.

Select institutions for reference\*

Training - Network Zone - Clean

Training - Member 2 - Clean

Select Classifications

Classification Type

LC Classification

Classifications for Analysis\*

AC - Collections. Series. Collected works/Collections of monographs, essays, etc./American and English

AN - Museums. Collectors and collecting/Newspapers

Define Publication Years

Earliest Possible Publication Year

From

To

Display only marked for Retention

Display only marked for retention in reference institutions.

Scope saved.

ExLibris

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Clarivate

IGOLU  
INTERNATIONAL GROUP OF EX LIBRIS USERS



# Consortial Analytics

- Run report
- Further filtering within the dashboard
- Export Lists

MEMBER 1

Electronic portfolios Keywords

Alma QA

Collection Development

Acquisitions

Resources

Discovery

Fulfillment

Admin

Analytics

Show MDE

Configuration

Network Member LC Classification Dewey Classification Publisher Earliest Publication Date My Number of Items My Number of Loans Past 5 Years My Number of Loans Past 5 Years My Number of Loans Past 5 Years My Number of Loans Past 5 Years Number of Institutions

Books Deselection Recommendations

This dashboard showcases your books which are **not committed to retain**, are **not in an active course** and are **held in at least one of your reference institutions**. The records included are bibliographic records with the Resource Type set to "Book - Physical," and each has at least one physical item with an active status. The matching process utilizes an algorithm that takes into account bibliographic metadata from your records in Alma. Records lacking sufficient metadata are excluded from this analysis. The OTB report is filtered according to no usage in the past five years. You can refine the list according to your strategy using the filters above.

Candidates for Deselection

269

Number of Titles Present in other Institutions

Alma College 192 (71.38%)

Eastern University 77 (28.62%)

ID	MMS ID	Title (Complete)	ISBN	Earliest Publication Date	Publisher	LC Code	LC Group 2	Dewey Number	Dewey Group 2	My Number of Items	My Number of Loans Past 5 Years (in house + not in house)	My Number of Loans Past 5 Years (not in house)	My Number of Loans Past 5 Years (not in house)	My Number of Loans Past 5 Years (not in house)	Num of Loans	Loan Ratio	Reference Institution Name	Num Items Reference Institution	Has Item Committed To Retain	Retention Reason	Item Policy	Physical Condition
18086808	99005033585020277	American modernism at the Art Institute of Chicago: from World War I to 1955 / Judith A. Barter [and others] with contributions by Jennifer M. Downs.	0300117388; 9780300117387	2009	Distributed by Yale University Press; Art Institute of Chicago	N	History	709	Arts	98	0	0	0	0	0	0	Alma	1	Yes			
18086808 Total																		1				
18779390	99003009062020277	Paul Klee and the decorative in modern art / Jenny Anger.	0780521822503; 0521822505	2004	Cambridge University Press	N	History	760	Graphic arts; printmaking & prints	98	0	0	0	0	0	0	Eastern	30	Yes	Faculty Publication; Local commitment to retain	Library Use Only; Regular	
18779390 Total																		30				
		An uncommon																				

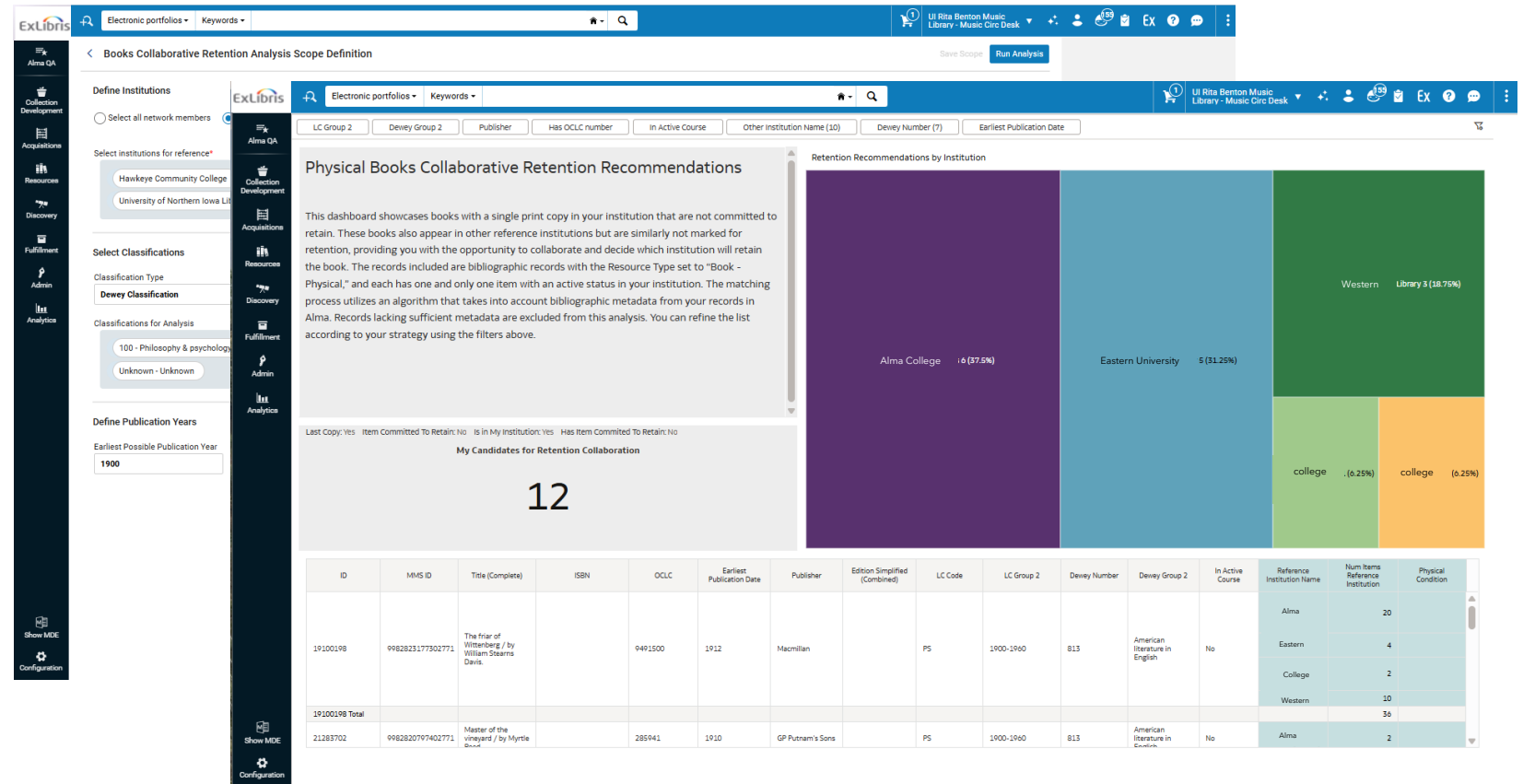
# Consortial Analytics

4 reports will be available 2025 H2:

- Retention
- Deselection
- Collaborative Retention
  - Flags unretained single-copy titles across selected institutions
- Expansion

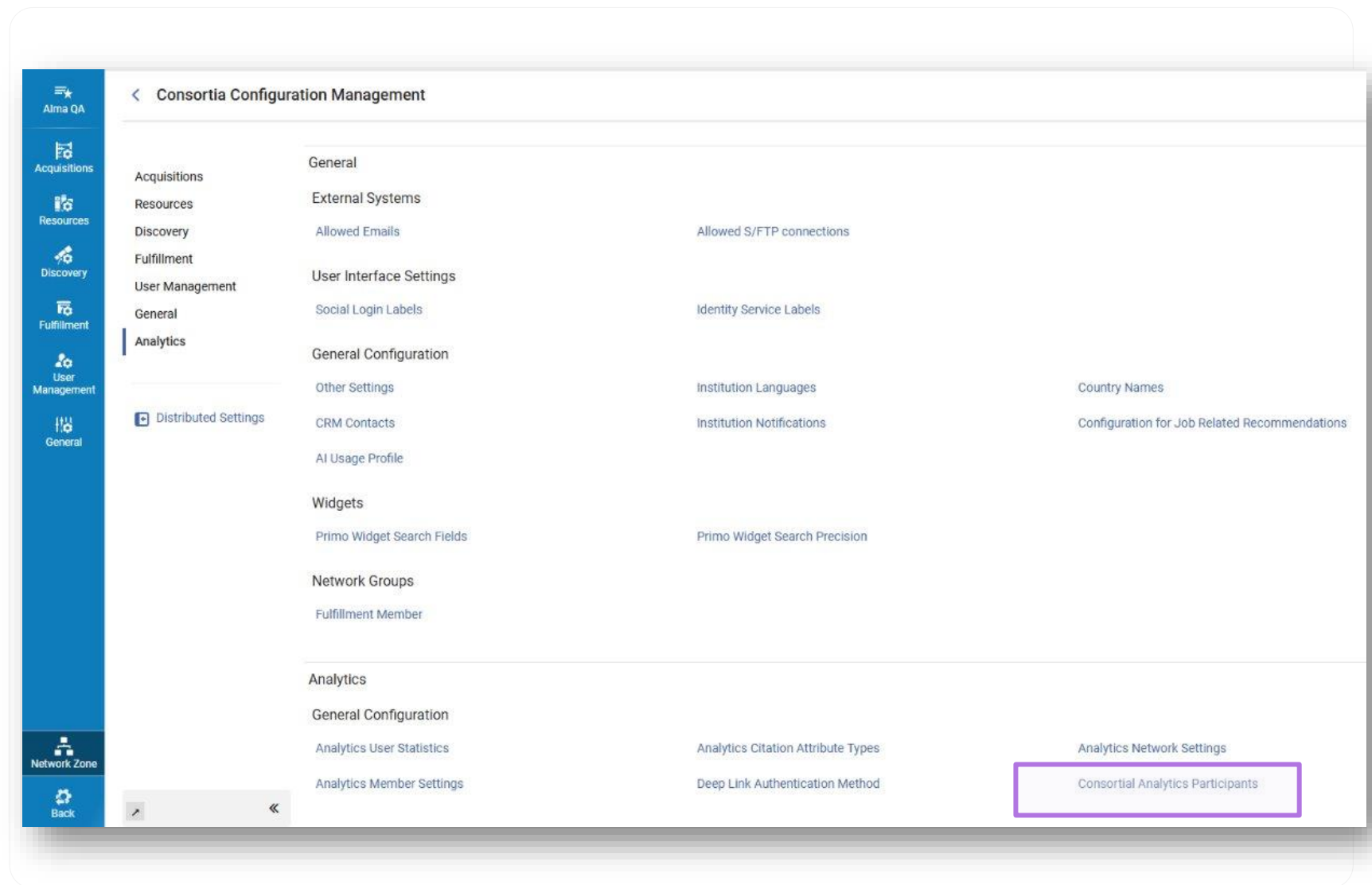
## Enable

- NZ Administrator enable for all members
- IZ member assigns one user with a "Consortial Analytics Consumer" Role



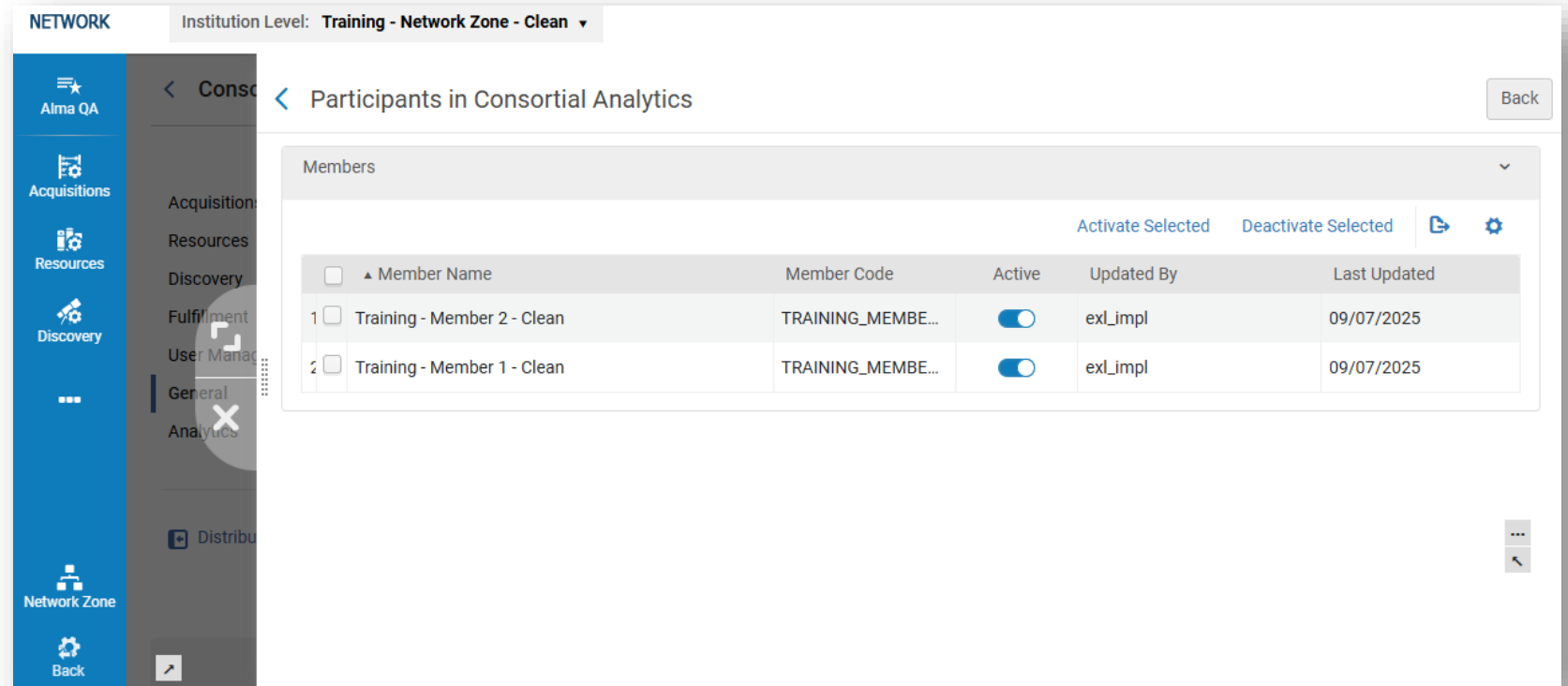
# Consortial Analytics

Enabling by NZ Administrator



# Consortial Analytics

## Enabling by NZ Administrator



The screenshot displays the 'Participants in Consortial Analytics' page within the 'Training - Network Zone - Clean' institution level. The page features a sidebar with navigation options: Alma QA, Acquisitions, Resources, Discovery, and Network Zone. The main content area shows a table of members with columns for Member Name, Member Code, Active status, Updated By, and Last Updated. Two members are listed, both with 'Active' status and 'exl\_impl' as the updated by user.

Member Name	Member Code	Active	Updated By	Last Updated
Training - Member 2 - Clean	TRAINING_MEMBE...	Active	exl_impl	09/07/2025
Training - Member 1 - Clean	TRAINING_MEMBE...	Active	exl_impl	09/07/2025

Once an Institution have been added, a new "Consortial Analytics Consumer Role" will be available for one user per institution



# Thank You

# Your voice matters!

**Take our 2-min  
survey now**



## **Help us innovate**

Your feedback drives the next generation of valuable solutions

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## **See real impact**

The improvements you experience today are direct results of feedback from customers like you

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## **Shape the future**

Help us prioritize improvements that will continue to add value to your work