

# 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**

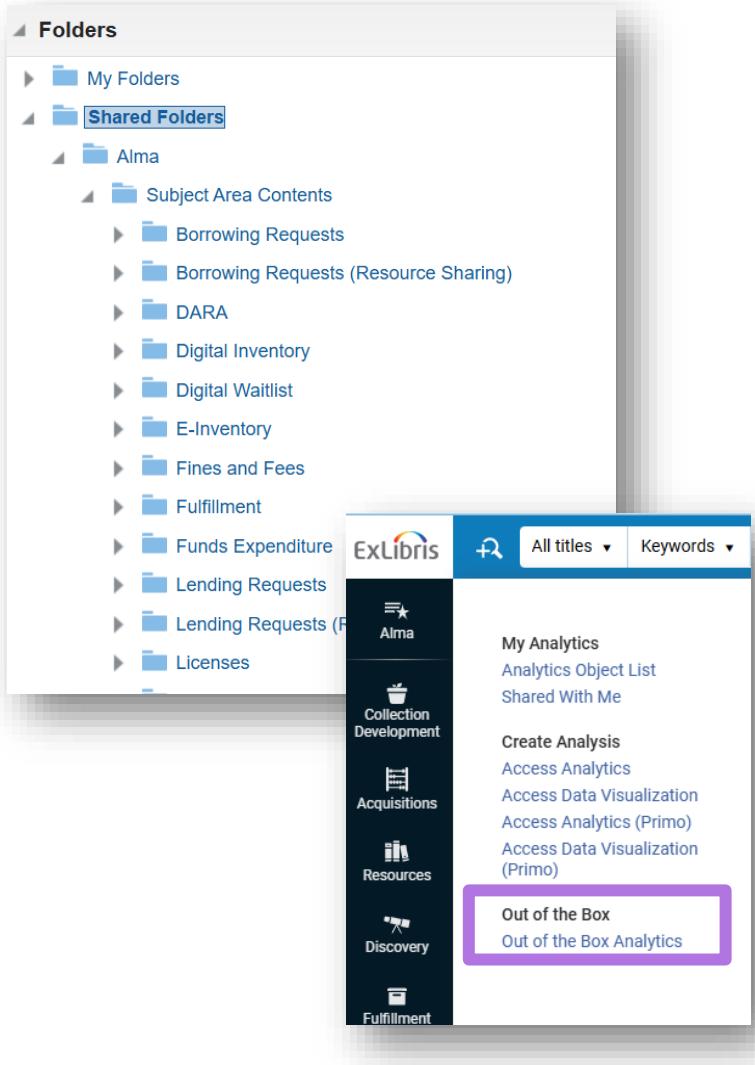
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# Out-of-the Box Reports Revamp



# 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

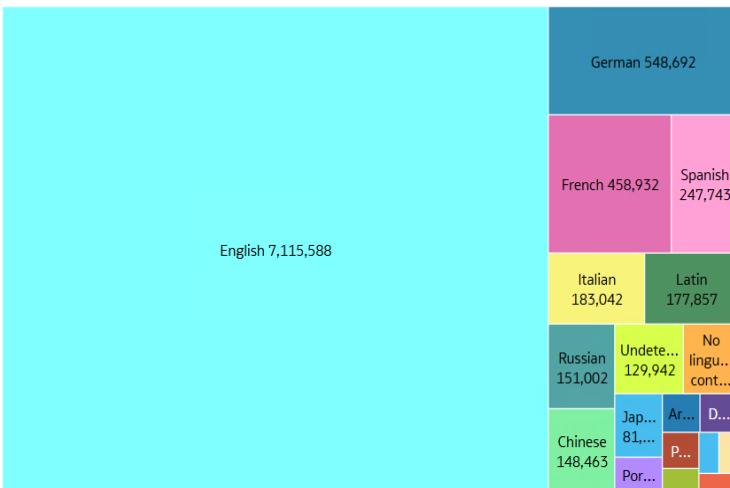
Collection Development  
Electronic Resources



# Bibliographic Record Distribution

## By Language

Top 20 Language in Collection



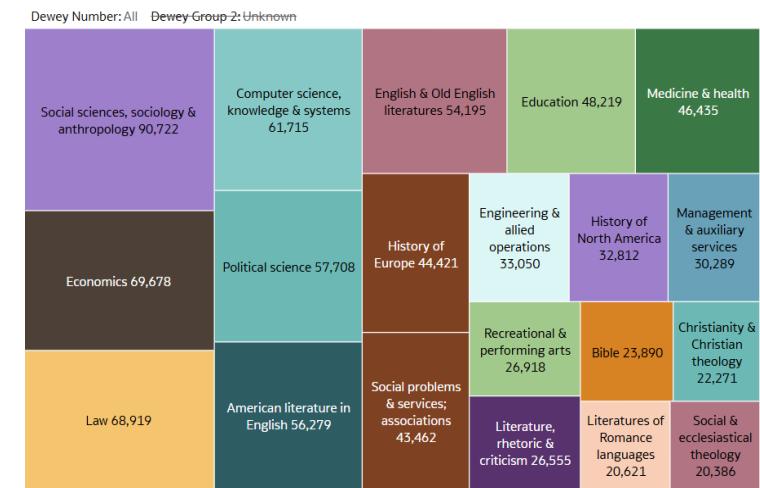
## By Place of Publication

Top 20 Publication Countries in Collection



## By Classification

Top 20 Dewey Classifications in the Collection



### Bibliographic Records Distribution by LC and Dewey Classifications

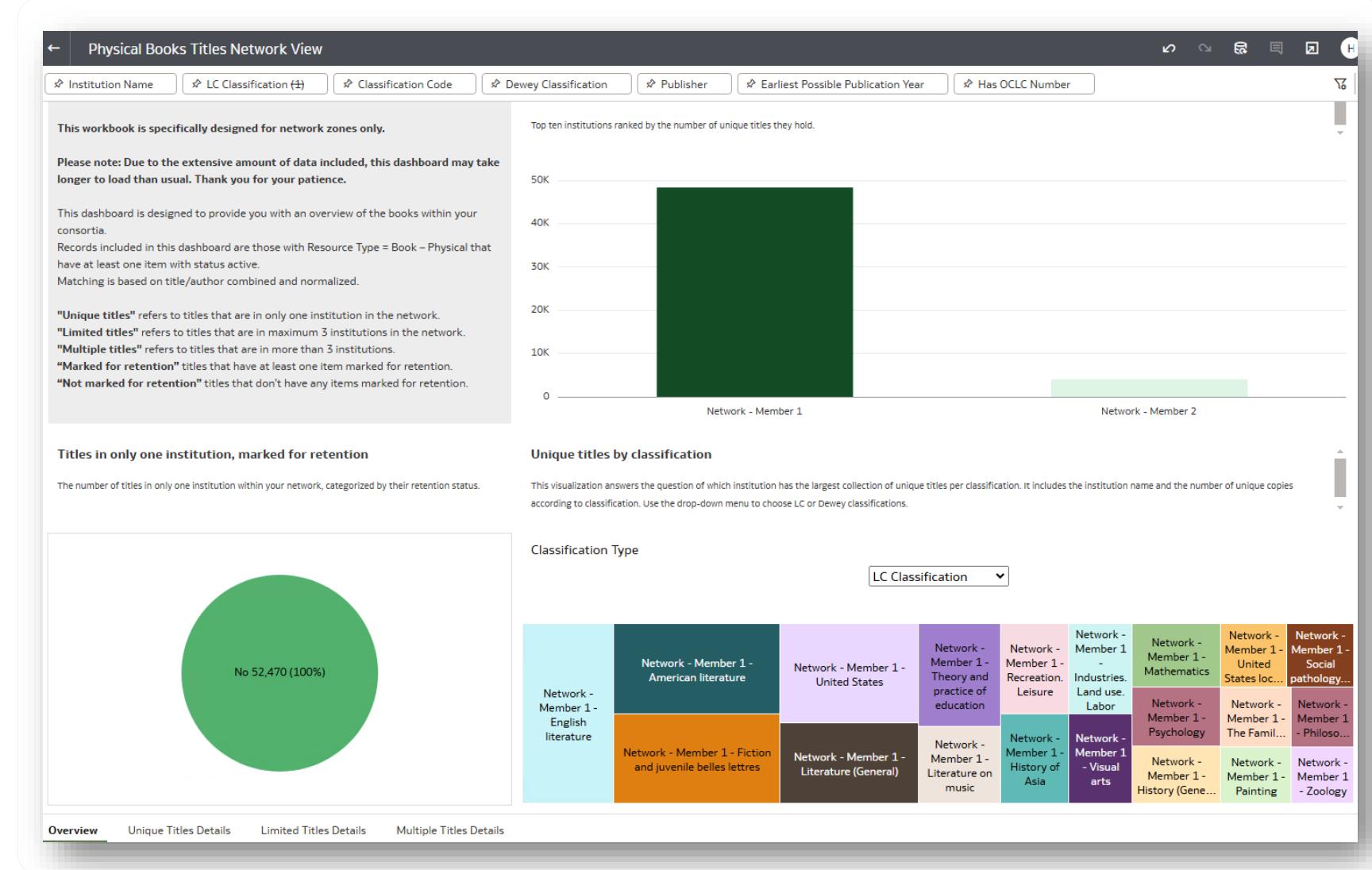
This dashboard shows the most prominent Library of Congress (LC) and Dewey classifications in the catalog, highlighting the distribution of different areas of knowledge across the collection. Users can filter and analyze the data to see how well the library's holdings align with various fields of study 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. 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: 0, Network - Member 1, Network - Me... LC Classification: Recreation. Leisure Dewey Classification: All Is marked for retention: All In active course: 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	99115910000541	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	99934690000541	1				Prentice-Hall	1953	Recreation. Leisure	796	796.35 T95t	No	No	
25 years of American dance / [Editor: Doris Hering.]	Network - Member 1	991261910000541	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 Collection Overview

E-Collection Access Type E-Collection Linked to CZ Has Cost E-Collection Interface Name E-Collection Material Type E-Collection Type

### Electronic Collection Overview

This data visualization displays an overview of your electronic collections and portfolios, including a tree map that allows you to compare the sizes of your e-collections and a pie chart that displays the percentage of your e-collections with and without portfolios. Several filters are available that allow you to configure the display, for example, according to access type, whether the portfolio has a cost or is free, and whether collections are managed locally or linked to the

#### Top 20 E-Collections by Number of Active Portfolios

	No. of E-Collections	No. of Active Portfolios
123Library	45,689	154
JSTOR Books	40,121	748,704
Ebook Central Taylor & Francis EBA 10 Year Collection	74,239	
US Government Documents	283,422	
Ebook Central Social Sciences - International	73,745	
Free E- Journals	26,952	
EBSCOhost Entrepreneurial Studies Source	25,905	
ProQuest Central	25,681	
EBSCOhost Audiobooks	24,911	
Ebook Central Education	13,284	
Factiva - Classic	12,796	
DOAJ Directory of Open Access Journals	21,772	
Business Premium Collection	9,724	
Research Library ...		
Lex... Inte...		
ProQu... Engli...		
EBSCOhost Academic ...		
Music ...		
Adva...		

#### Number of E-Collections with and without Portfolios

154 (87.66%)

No 19 (12.34%)

#### E-Collections Details

E-Collection Public Name	E-Collection ID	No. of Portfolio (In Repository)	No. of Available Portfolio	E-Collection Interface Name	E-Collection Linked to CZ	Has Cost	E-Collection Material Type	E-Collection Type	Service Portfolio Auto Activate	Service Portfolio Auto Delete
123Library	6111169908000541	45,684	45,684	123Library	Yes	No	Book	Aggregator	Yes	

# Electronic Resources Activations

Create Actionable Lists for further collaboration

Electronic Resources Activations

E-Collection Activation Date Portfolio Activation Date E-Collection Interface Name E-Collection Access Type E-Collection Type

**Electronic Resources Activations**

This dashboard provides a comprehensive overview of electronic collection and portfolio activations over the past year, helping you monitor and analyze resource management activations. The visualizations highlight trends in activations, including a breakdown of Community linked versus locally managed electronic collections and portfolios. A detailed table offers additional information about the inventory, including the number of linked and local portfolios, management level and service configuration.

Use this dashboard to identify activation patterns and better understand how your library is using Community resources. It may highlight an opportunity to increase the usage of these resources, saving time and lowering costs by reducing the need for local record maintenance.

**E-Collection Activations**

No. of E-Collections

Sep 2024 Oct Nov Dec Jan 2025 Mar Apr May Jun

No. of E-Collections (Linked to CZ) No. of E-Collections (Not Linked to CZ)

**Portfolio Activations**

No. of Portfolios

Aug 2024 Sep Oct Nov Dec Jan 2025 Feb Mar Apr May Jun Jul

No. of Portfolios (Linked to CZ)

**E-Collections: Community Linked vs Locally Managed**

No 1 (7.69%)

13

Yes 12 (92.31%)

Electronic Collection Linked To CZ No Yes

**Portfolios: Community Linked vs Locally Managed**

No 1,184 (0.43%)

273K

Yes 271,519 (99.57%)

Portfolio Linked To CZ No Yes

**Community Linked Collections**

E-Collection Name	E-Collection ID	Number of CZ Linked Portfolios	Number of Local Portfolios	Interface	Management Level in CZ	E-Collection Access Type	E-Collection Type
123Library	6111169080000541	45,689	0	123Library	Ex_Libris	Current	Aggregator package
AMA Current Titles	6111169080000541	4	0	American Medical Association	Ex_Libris	Current	Selective package
Ebook Central Social Sciences - International	61113438470000541	73,745	1,164	Ebook Central	Ex_Libris	Current	Aggregator package

Coming  
Soon!

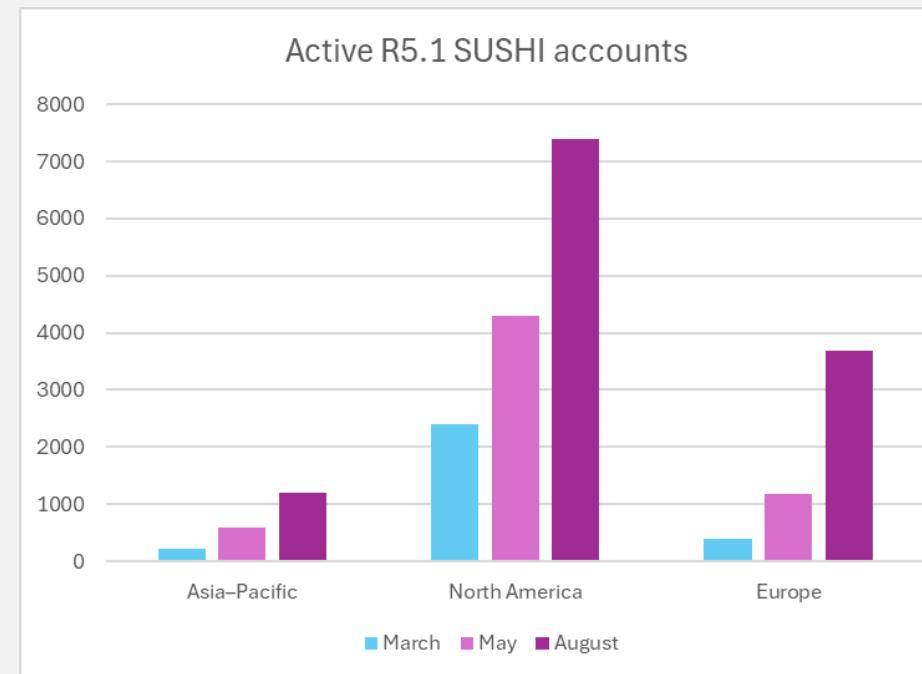
Top Electronic Collections  
by Link Resolver Activity

# Counter R5.1

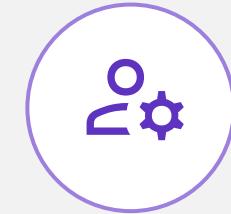


# Counter R5.1

- 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 shows a software interface for managing local parameters for holdings. On the left, a sidebar lists 10 parameters, each with a small icon and a blue link. On the right, the main panel is titled 'Selected Columns' and shows a 'Holding Details' section with two items: '908 - Holding Local Param 01' and '909 - Holding Local Param 02', each with a gear icon. Below this is a 'Filters' section.

- 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

**Selected Columns**

Holding Details

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

**Filters**

# Analytics Display Local Params

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



# 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 <b>Code</b> .	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 <b>Description</b> .	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 shows a library management system interface. On the left, a sidebar menu includes links for Alma Production, Collection Development, Acquisitions, Resources, Discovery, Fulfillment, Admin, Analytics, Show MDE, and Configuration. The main panel displays a list of reports under the heading 'Shared With Me (1 - 6 of 6)'. The reports are:

- 1 Active Loans for Review (Type Report, Subject Areas Fulfillment)
- 2 Cost Per Use by Usage Type (Type Report, Subject Areas E-Inventory)
- 3 Expenditure and Encumbrances Per Classifications (Type Report, Subject Areas Funds Expenditure)
- 4 Expenditure Per Classifications (Type Report, Subject Areas Funds Expenditure)
- 5 Portfolios Created in Last 24 Months and Not Activated (Type Data Visualization Workbook, Subject Areas E-Inventory)
- 6 Scheduled Facets Report (Type Report)

The right side of the interface features a 'Report Preview' section for 'Active Loans for Review' and an 'Analytics Assistant' sidebar. The 'Analytics Assistant' sidebar contains a message box with the text: 'Ask what is right for you? NOTE: Collection Development Assistant uses AI and may contain errors or omissions' and a text input field 'What is your question?'. A small circular icon with a question mark is also visible.

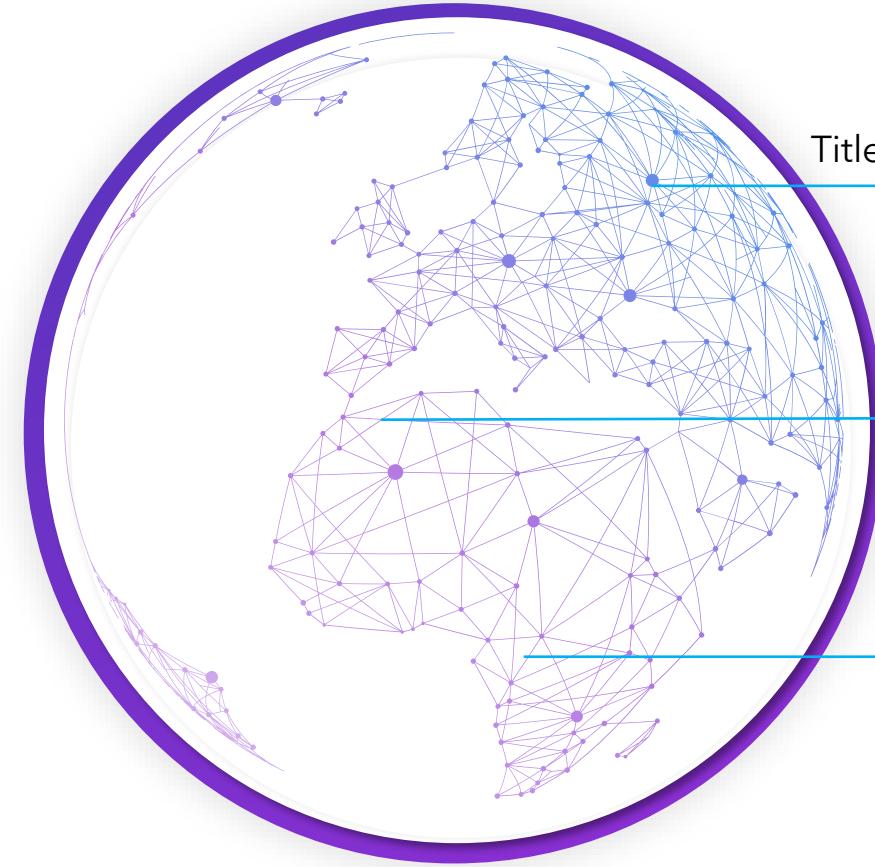
\*Conceptual image only. Does not reflect actual product plans or future developments.

# Consortial Analytics



# Consortial Analytics

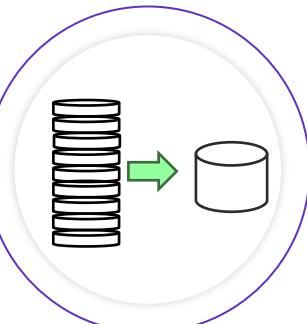
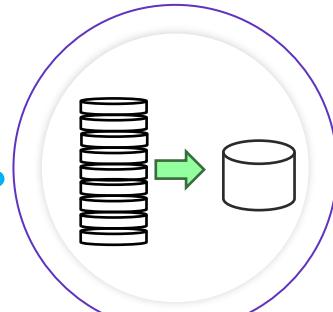
Supporting Consortia members to collaborate



Title & Holding data

Title & Holding data

Title & Holding data



# Consortial Analytics

Collaborative member view



## Collaborative

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

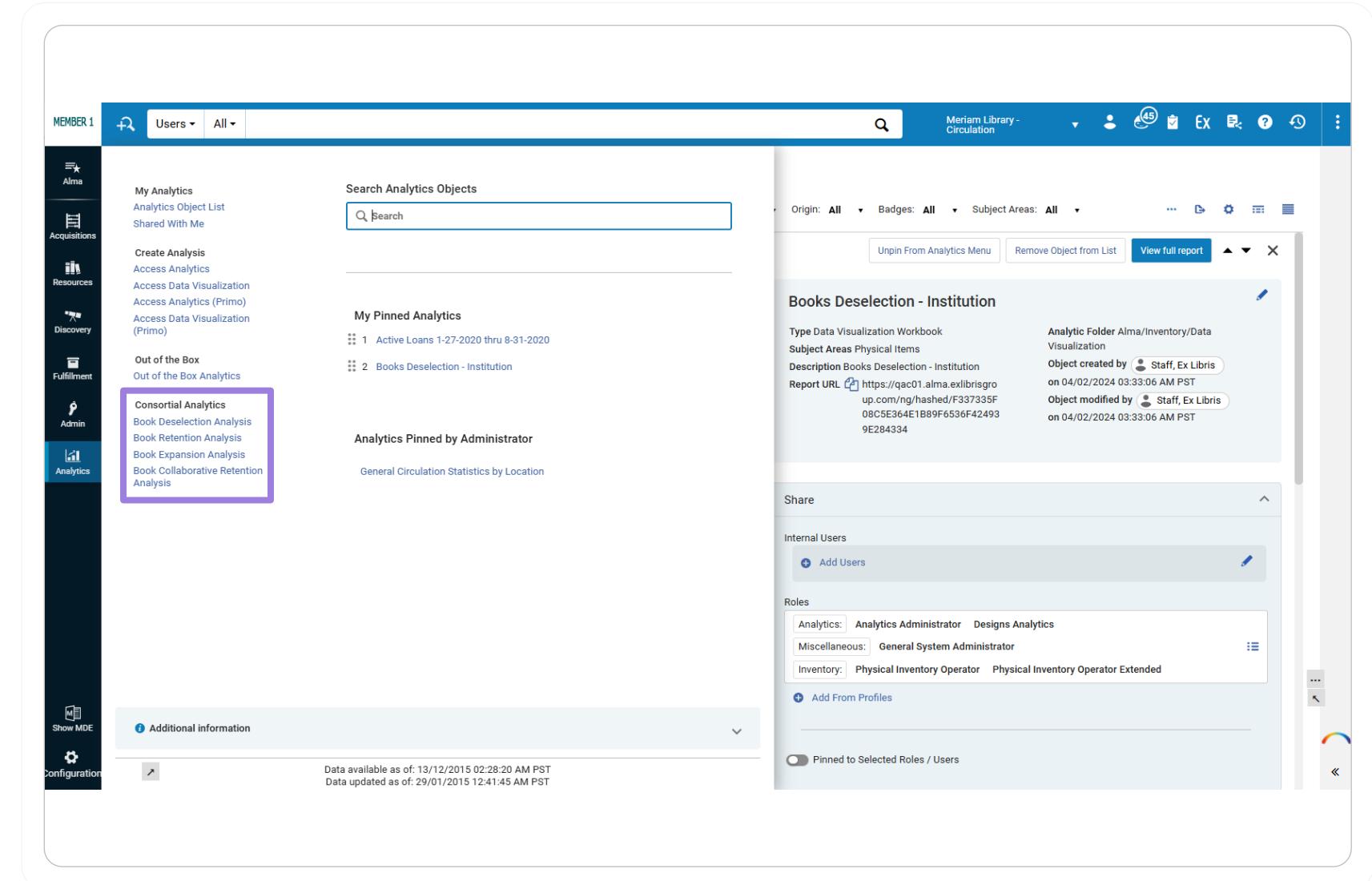


## Gap Analysis

- 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 shows the Alma Analytics interface. The left sidebar is titled 'MEMBER 1' and includes links for Alma, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The 'Analytics' link is highlighted with a purple box. The main content area has a blue header with 'Users' and 'All' dropdowns, a search bar, and a user menu. The header also displays 'Meriam Library - Circulation' and various icons. The main content includes sections for 'My Analytics', 'Search Analytics Objects', 'My Pinned Analytics' (listing 'Active Loans 1-27-2020 thru 8-31-2020' and 'Books Deselection - Institution'), 'Analytics Pinned by Administrator' (listing 'General Circulation Statistics by Location'), and an 'Additional information' section. The 'Books Deselection - Institution' object is highlighted with a purple box. The object details are as follows:

**Books Deselection - Institution**

Type Data Visualization Workbook  
Subject Areas Physical Items  
Description Books Deselection - Institution  
Report URL <https://qac01.alma.exlibrisgroup.com/ng/hashed/F337335F08C5E364E1B89F6536F424939E284334>  
Object created by  Staff, Ex Libris on 04/02/2024 03:33:06 AM PST  
Object modified by  Staff, Ex Libris on 04/02/2024 03:33:06 AM PST

**Share**

Internal Users: [Add Users](#)

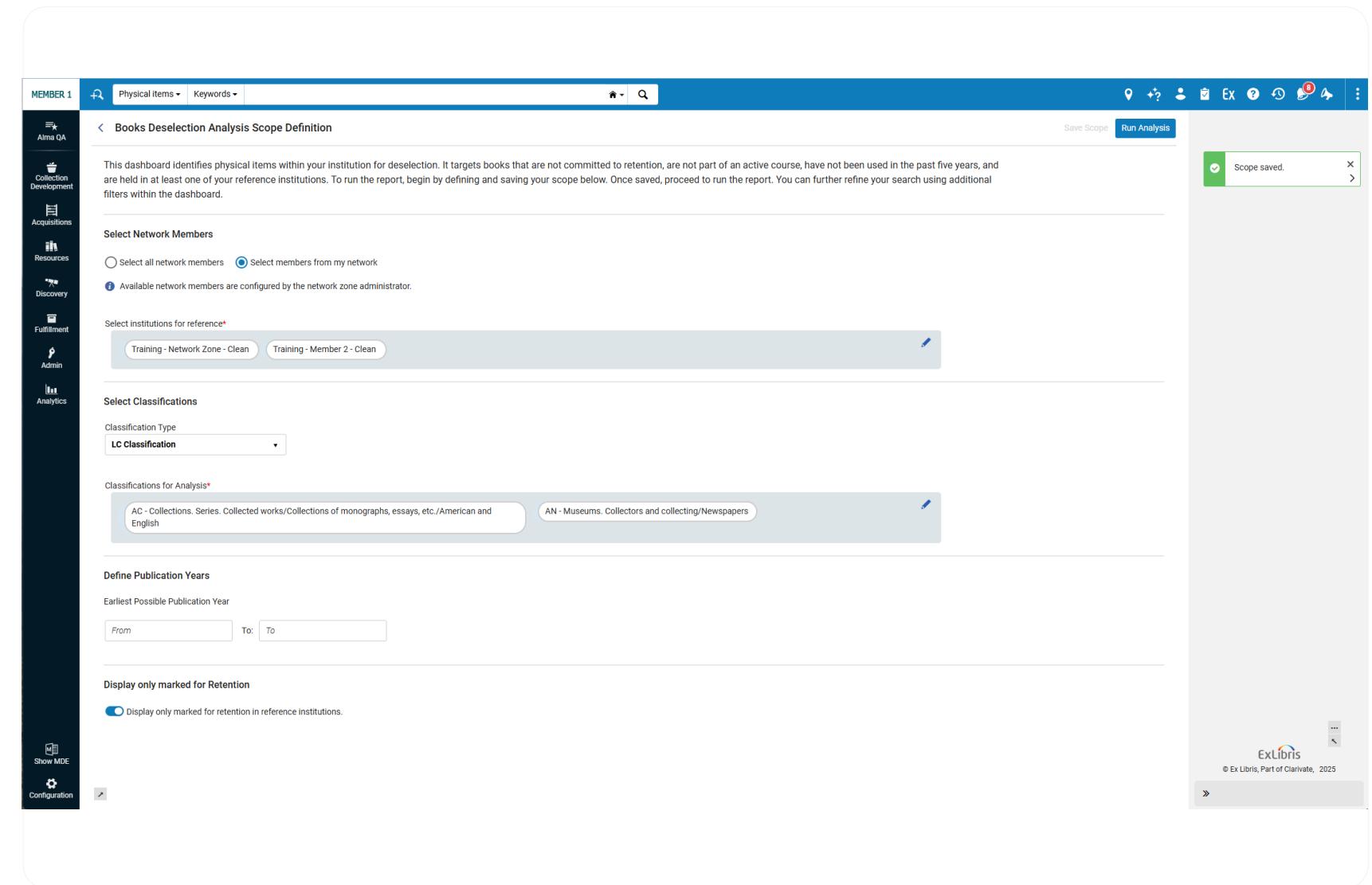
**Roles**

Analytics: Analytics Administrator, Designs Analytics  
Miscellaneous: General System Administrator  
Inventory: Physical Inventory Operator, Physical Inventory Operator Extended

Pinned to Selected Roles / Users

# Consortial Analytics

Start by defining analysis Scope within an Alma form editor



The screenshot shows the 'Books Deselection Analysis Scope Definition' dashboard in the Alma interface. The left sidebar lists 'Member 1' and various functional modules: Alma QA, Collection Development, Acquisitions, Discovery, Fulfillment, Admin, and Analytics. The main content area includes a search bar with 'Physical Items' and 'Keywords' dropdowns, and a 'Run Analysis' button. A message at the top right says 'Scope saved.' A sidebar on the right contains the Ex Libris logo and the text '© Ex Libris, Part of Clarivate, 2025'.

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

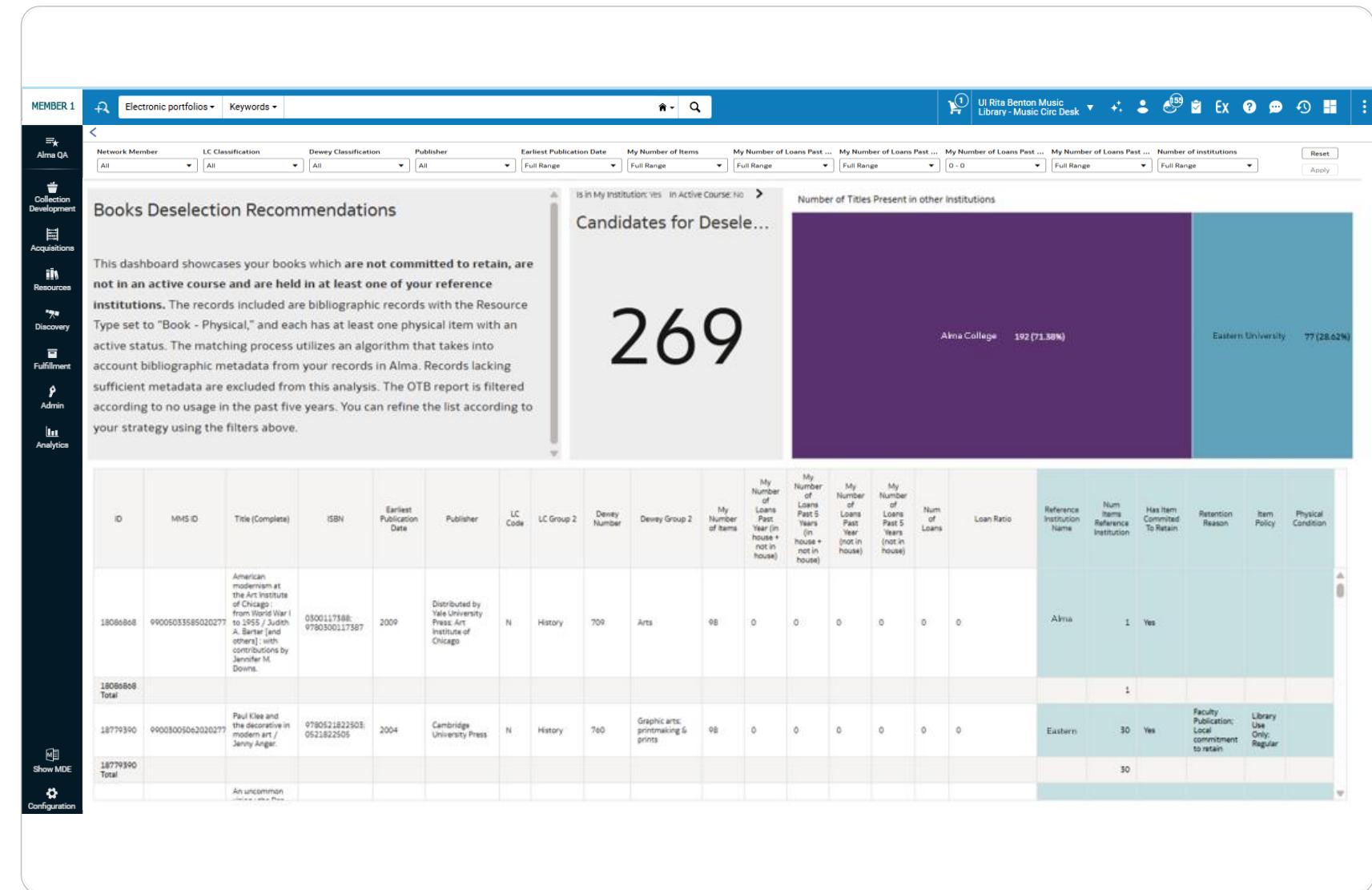
From To: To

Display only marked for Retention

Display only marked for retention in reference institutions.

# Consortial Analytics

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



The screenshot shows a dashboard titled "Books Deselection Recommendations" within the "Analytics" section of the Alma platform. The dashboard is designed to identify books that are not committed to retain, are not in an active course, and are held in at least one of the user's reference institutions. It includes a search bar, filter options for network member, LC classification, Dewey classification, publisher, earliest publication date, and various loan metrics. The main area displays a large number "269" representing the count of recommended titles. Below this, a chart shows the number of titles present in other institutions, with Alma College at 192 (71.38%) and Eastern University at 77 (28.62%). The bottom section is a detailed table with columns for 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 (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, and Physical Condition. The table lists several books, including "American modernism at the Art Institute of Chicago: from World War I to 1955" and "Paul Klee and the Sublime in modern art".

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 (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
18086868	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. Downen.	0300117188; 9780300117387	2009	Distributed by Yale University Press; Art Institute of Chicago	N	History	709	Arts	98	0	0	0	0	0	Alma	1	Yes			
18086868	Total																		1		
18779390	99003005062020277	Paul Klee and the Sublime in modern art / Jenny Angier.	9780521822505; 0521822505	2004	Cambridge University Press	N	History	760	Graphic arts; printmaking & prints	98	0	0	0	0	0	Eastern	30	Yes	Faculty Publication; Local commitment to retain	Library Only; Regular	
18779390	Total	An uncommon																30			

# 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

Books Collaborative Retention Analysis Scope Definition

Define Institutions

Select all network members

Select institutions for reference\*

Hawkeye Community College

University of Northern Iowa

Select Classifications

Classification Type

Dewey Classification

Classifications for Analysis

100 - Philosophy & psychology

Unknown - Unknown

Define Publication Years

Earliest Possible Publication Year

1900

Retention Recommendations by Institution

Alma College 16 (37.5%)

Eastern University 5 (12.5%)

Western Library 3 (18.75%)

college (0.25%)

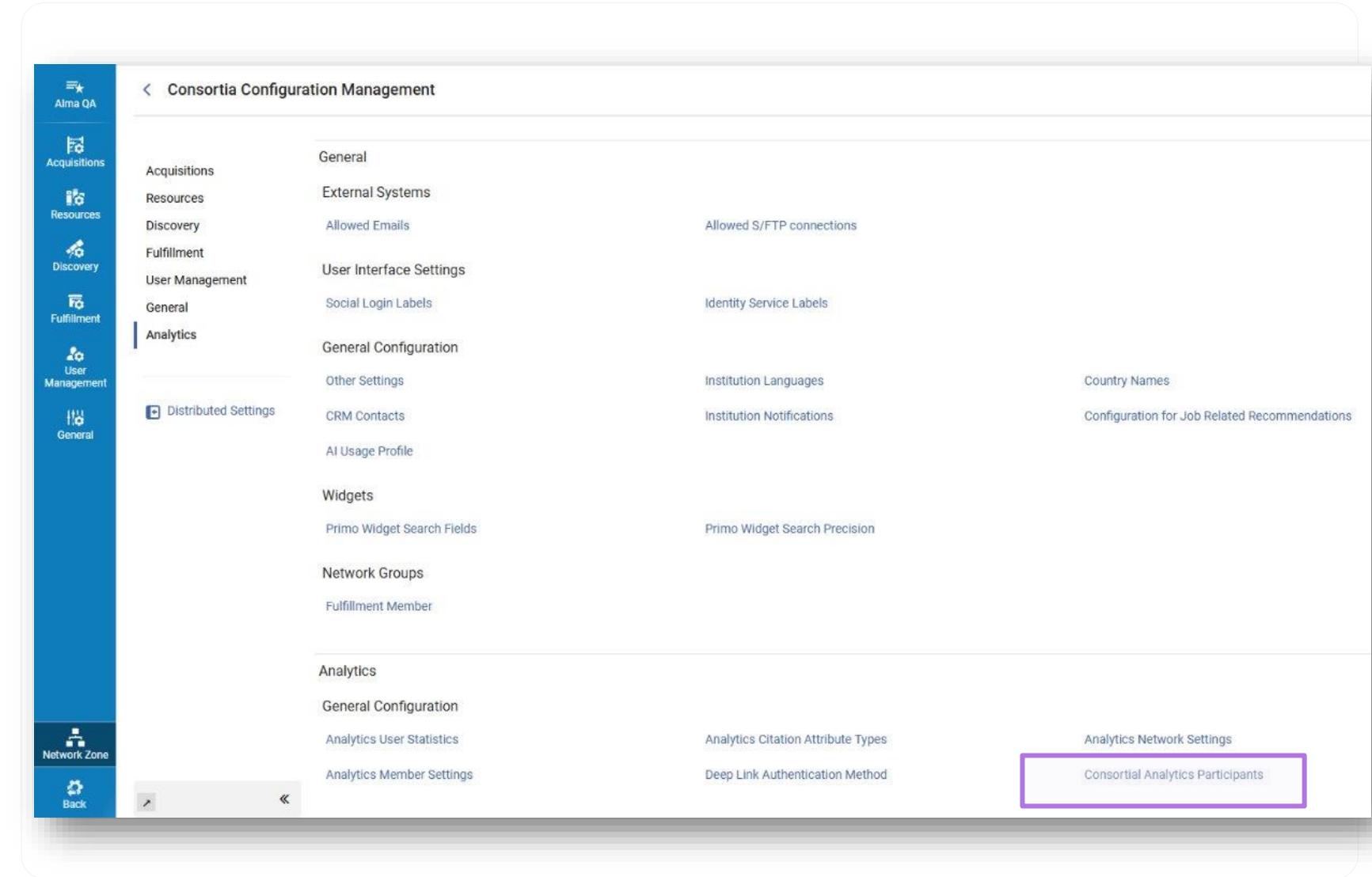
college (0.25%)

12

ID	MMS ID	Title (Complete)	ISBN	OCLC	Earliest Publication Date	Publisher	Edition Simplified (Combined)	LC Code	LC Group 2	Dewey Number	Dewey Group 2	In Active Course	Reference Institution Name	Num Items Reference Institution	Physical Condition
19100198	998283177302771	The friar of Wittenberg / by William Stearns Davis.		9491500	1912	Macmillan	PS	1900-1940	813	American literature in English	No	Alma	20		
19100198 Total												Eastern	4		
21283702	9982820797402771	Master of the vineyard / by Myrtle		285941	1910	GP Putnam's Sons	PS	1900-1940	813	American literature in English	No	College	2		
												Western	10		
													36		
												Alma	2		

# Consortial Analytics

Enabling by NZ Administrator



The screenshot shows a web-based configuration interface for 'Consortia Configuration Management'. The left sidebar contains a navigation menu with the following items:

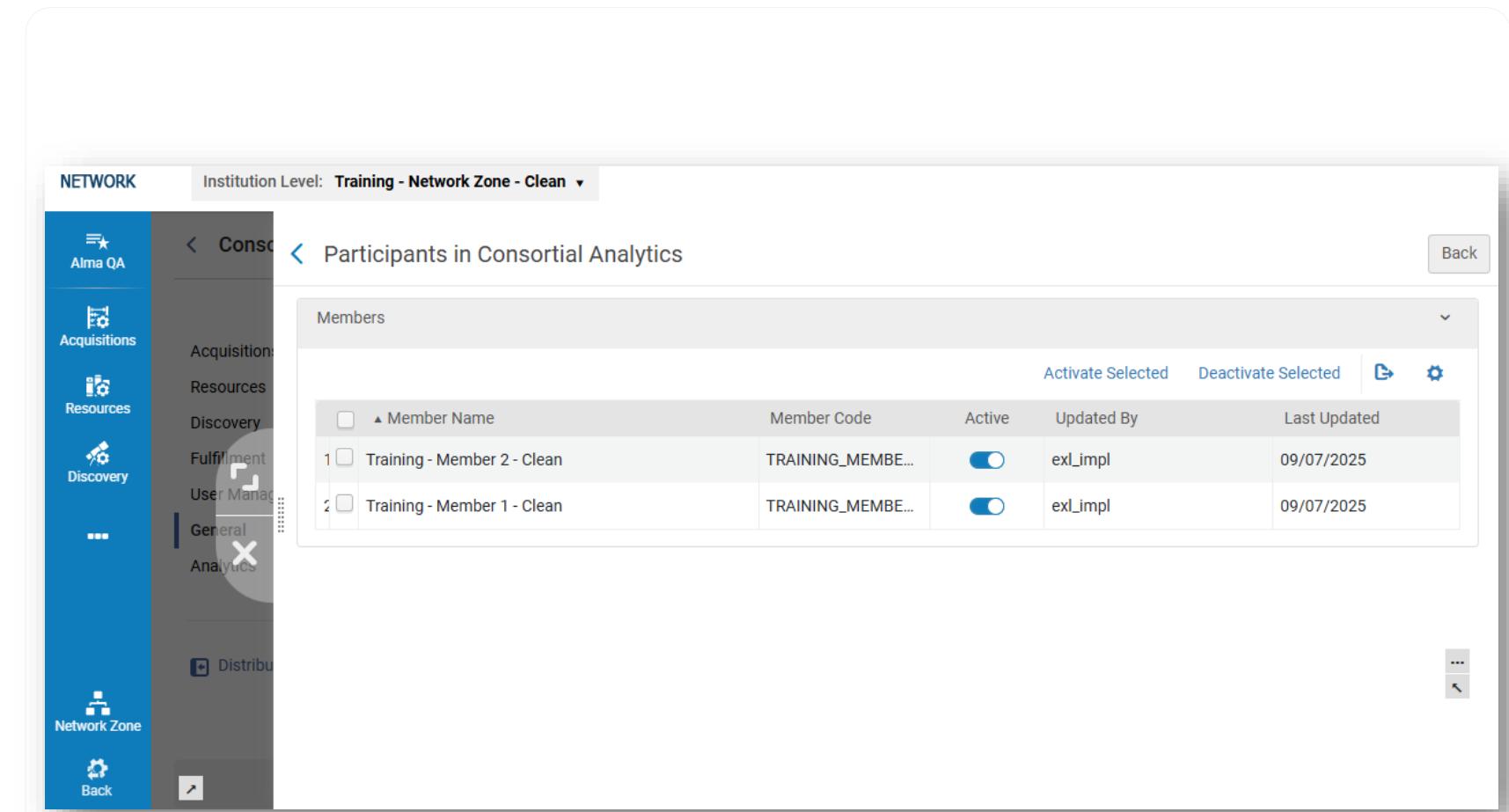
- Alma QA
- Acquisitions
- Resources
- Discovery
- Fulfillment
- User Management
- General
- Analytics
- Distributed Settings
- Network Zone

The main content area is titled 'Consortia Configuration Management' and contains several configuration sections:

- General**
  - Acquisitions
  - Resources
  - Discovery
  - Fulfillment
  - User Management
  - General
  - Analytics
  - Distributed Settings
- External Systems**
  - Allowed Emails
  - User Interface Settings
  - Social Login Labels
  - General Configuration
  - Other Settings
  - CRM Contacts
  - AI Usage Profile
- Allowed S/FTP connections**
- Identity Service Labels**
- Institution Languages**
- Country Names**
- Institution Notifications**
- Configuration for Job Related Recommendations**
- Widgets**
  - Primo Widget Search Fields
  - Primo Widget Search Precision
- Network Groups**
  - Fulfillment Member
- Analytics**
  - General Configuration
  - Analytics User Statistics
  - Analytics Member Settings
  - Analytics Citation Attribute Types
  - Deep Link Authentication Method
  - Analytics Network Settings
  - Consortial Analytics Participants

# Consortial Analytics

Enabling by NZ Administrator



The screenshot shows the 'Participants in Consortial Analytics' page within the Network Zone. The left sidebar includes 'Alma QA', 'Acquisitions', 'Resources', 'Discovery', 'Fulfilment', 'User Management', 'General', 'Analytics' (which is selected and highlighted in blue), and 'Distributions'. The main content area displays a table of members:

<input type="checkbox"/>	Member Name	Member Code	Active	Updated By	Last Updated
1	Training - Member 2 - Clean	TRAINING_MEMBER...	<input checked="" type="checkbox"/>	exl_impl	09/07/2025
2	Training - Member 1 - Clean	TRAINING_MEMBER...	<input checked="" type="checkbox"/>	exl_impl	09/07/2025

Buttons for 'Activate Selected' and 'Deactivate Selected' are located at the top of the table. A 'Back' button is in the top right corner.

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



## **See real impact**

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



## **Shape the future**

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