



# Weizmann Library

## Dashboards in Alma Analytics

An Electronic Resources Health Checklist



מכון ויצמן למדע

WEIZMANN INSTITUTE OF SCIENCE

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# Dashboards in Analytics

- Still learning? Try [Ex Libris training](#)
- Lots of pre-made dashboards
  - Alma – from Ex Libris
  - Community – from other customers
- Usually broad picture
  - Annual trends
  - Summary

The screenshot displays the Ex Libris Analytics interface. On the left, a 'Folders' pane shows a hierarchical tree structure:

- My Folders
- Shared Folders
  - Alma
    - Dashboards
    - Acquisitions
      - Dashboards
      - Prompts
      - Reports
  - Community
    - Reports
      - My Dashboard
      - Consortia
      - Ex Libris Development
      - Institutions
        - 01CARLI
        - 01SLCO\_CUW
        - 01SUN-Stockton University
        - 01SUNY

On the right, a list of reports is shown with filters for 'Type' (All) and 'Sort' (Name A-Z). The reports include:

- Analytics Issues Report** | Last Modified 5/2/2021 9:02:41 AM
- Detailed Expenditures** | Last Modified 5/2/2021 9:02:41 AM
- Expenditure Per Acquisition Method** | Last Modified 5/2/2021 9:02:41 AM
- Expenditure Per Acquisition Method - Annual Trend** | Last Modified 5/2/2021 9:02:41 AM
- Expenditure Per Acquisition Method - Top 10** | Last Modified 5/2/2021 9:02:41 AM

# E-Resource Quality Review Needed

- Moved from Aleph and SFX to Alma in Feb 2017
- Gradual cleaning up, but electronic resource acquisitions still need work
  - portfolio or CDI not activated
  - EZproxy missing
  - usage data problems
  - other issues
- Solutions
  - Ongoing troubleshooting
  - DARA recommendations
  - Community Zone Updates Task List
  - **health check at renewal = scrutinize each collection at least once a year**

# Goal: At-a-Glance Single Collection Checks

- Multiple, short, easy-to-scan, focused analyses
- Highlight missing or incomplete information
- Challenges
  - Matching Alma to Analytics fields
  - Interpreting Analytics fields (help page)
  - Ongoing, frequent CDI field changes
  - Identifying focus / problem areas
  - Emphasizing important details (logic)
- Convenient direct link from Alma interface

# Part 1: General Details

Shared prompt

**Edit Prompt: PO#**

Prompt For Column "PO Line". "PO Number" *fx*

Label PO#

Custom Label

Description

Operator is equal to / is in

User Input Choice List

**Options**

General More

Choice List Values All Column Values

Include "All Column Values" choice in the list

Enable user to select multiple values

Enable user to type values

Require user input

Limit values by All Prompts

Auto Fill  None  
 First Available Value

Default selection Specific Value

PO-241301

Set a variable Presentation Variable

pPONUM

Order Prompt

**Edit Prompt: PO (default from 1st tab)**

Prompt For Column "Electronic Collection PO Li" *fx*

Label PO (default from 1st tab)

Custom Label

Description

Operator is equal to / is in

User Input Choice List

**Options**

General More

Choice List Values All Column Values

Include "All Column Values" choice in the list

Enable user to select multiple values

Enable user to type values

Require user input

Limit values by All Prompts

Auto Fill  None  
 First Available Value

Default selection Variable Expression

@{pPONUM}

Set a variable None

Collection Prompt

# Part 2: License

No content unless there is a license

Analysis > Criteria > Edit Analysis Properties > Results Display > No Results Settings > Display Custom

**Analysis Properties** ?

**Results Display** Interactions Data

No Results Settings **Display Custom Message**  Contains HTML/JavaScript/CSS

Header

Message 

```
<h3 style="color:red; text-align:center;">NO  
LICENSE @ WEIZMANN <span style="color:black;  
font-size:x-small; font-weight: normal;">  
MALMAD licenses kept by MALMAD</span></h3>
```

View for Text Delivery **compoundView!1**

# Part 3: Service

Proxy Enabled check – must be enabled at this level

Analysis > Criteria > field > Column Properties > Conditional Format tab > add conditions

Description	Proxy Enabled	Uses Parser Parameters
Full Text	Yes	Parser Parameters

### Column Properties

Style
Column Format
Data Format
Conditional Format
Interaction


1.	Service Proxy Enabled is equal to / is in Yes <input type="text" value=""/>	Value 123	Aa	X v
2.	Service Proxy Enabled is equal to / is in No <input type="text" value=""/>	Value 123	Aa	X ^

Add Condition ▶
Clear All


# Part 4: CDI

? Help








Analysis > Results > Title view > edit > Help URL


 **Collection Check**

Criteria Results Prompts Advanced


 Title

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Title  


Display Saved Name

Logo  **Select Image** 


Optional - URL of a title image.  
*Note: When running in a secured environment, only with "fmap:".*

Subtitle  

Started Time  

Help URL  

Optional - URL for a document providing help on th  
*Note: When running in a secured environment, only with "fmap:".*

**Collection Check** 

Logic: Electronic Collection Lifecycle = In Repository



# Part 5: Analytics

- Idea: integrate COUNTER code with COUNTER Review page prompt
  - Currently not enough records with this information (Edit Collection > General > COUNTER Platform)
  - Must be added to manually
- Many challenges in the transfer from 4-5
  - Missing files
  - Multiple files
  - Counter 4-5 duplication
- If none, check Google Analytics EZproxy data or Alma Link Resolver

# To Do

- Second round of improvements
  - most use is November to February – annual renewals
- Finish separate page for individual portfolios
- Improve COUNTER integration
- Add COUNTER 5

## Other Presentation Ideas

- Is order page interesting enough?
- Hands-on workshop?

# ג'ון קולריק

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