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Counting, Then Re-Counting: National Statistical Reporting from within Alma and from Alma Analytics

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COUNTING, THEN RE-COUNTING: NATIONAL STATISTICAL REPORTING FROM WITHIN ALMA AND FROM ALMA ANALYTICS

ELUNA 2017

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THIS PRESENTATION: [HTTPS://WORKS.BEPRESS.COM/JULENE/25/](https://works.bepress.com/julene/25/)

ABOUT UK

- Migrated from Voyager to Alma, live in January 2016
 - Unbarcoded collections
 - Regional Federal Depository Library
 - Special Collections
- Library's goal for annual statistics: reasonably representative, reliable data
- What I do: report collections-based annual statistics for UK: electronic and print resources;
I am not UK's Assessment Librarian

CALENDAR FOR STATISTICS GATHERING

- Sept. 2016: Association of Research Libraries (ARL)
- Early-Oct. 2016: Accreditation Board for Engineering and Technology (ABET)
- Mid-Oct. 2016: Association of Academic Health Sciences Libraries (AAHSL)
- Nov. 2016: Council on East Asian Libraries (CEAL)
- Jan. 2017: Integrated Postsecondary Education Data System – Academic Library Survey (IPEDS) (data also used for ACRL)
- Jan. 2017: GPO Partnership Agreement (for one ASERL COE collection)
- Feb. 2017: Preservation Steward (GPO, for both ASERL COE collections)



PROBLEM WITH ALL STATISTICS:

OUTPUT IS ONLY AS GOOD AS INPUT

IF ONLY DATA IN CATALOG WERE PRISTINE!

PROBLEM #1: PHYSICAL ITEM SUBJECT AREA IN ANALYTICS

- Physical item subject area:
- Expects that items exist in Alma
 - Using “Is null” filter does not return results
- Can report about bibs using this subject area if you do not include parameters from holding or item-level folders
- Cannot accurately report on items if your collection is not fully barcoded and represented in Alma

A SOLUTION TO PROBLEM #1: PHYSICAL ITEM SUBJECT AREA IN ANALYTICS

- Easiest solution: Advanced search in Alma: physical title search with has items = no
 - Assume each title retrieved represents at least one volume

The screenshot shows the 'Advanced Search' interface in Alma. At the top, there is a 'Find' dropdown menu set to 'Physical titles'. Below this is an 'Add conditions' button. The search criteria are organized under the 'Holding' section. There are three rows of conditions, each starting with a bell icon and an 'And' dropdown menu. The first row has 'Has items' set to 'Equals' with the value 'No'. The second row has 'Permanent physical location' set to 'Equals' with the value 'Ed Juvenile Young Adult'. The third row has 'Library (Holding)' set to 'Equals' with the value 'Education Library closing for renovations 3/20 to 8/20'. Each value field has a search icon and a blue arrow button.

PROBLEM #2: DIFFERENCE IN CRITERIA OF STATISTICS

Duplicates included?

- ARL: yes
- IPEDS: no
- AAHSL: no

Are print volumes reported by specific format/language?

- IPEDS: yes
- CEAL: yes, specifically if in CJK languages*

Branch libraries reported separately?

- IPEDS: no
- ARL: can be, if noted
- AAHSL: on campus vs. remote storage

OUT-OF-THE-BOX INDUSTRY STATISTICS DASHBOARD DOES NOT HELP

Number of Objects | Items Added, Items Withdrawal | Item Count by Library and Location | Number of Loans and Renewals

Material Type

Physical Inventory Count
Total number of items broken down by material type
Time run: 5/9/2017 8:31:41 AM

Material Type	Number of Items
Book	1,712,118
Computer file	895
Journal	881,534
Map	17,758
Mixed material	221
Music	72,012
Visual material	26,615
Grand Total	2,711,153

Electronic Inventory Count
Total number of portfolios broken down by material type
Time run: 5/9/2017 8:31:41 AM

Material Type	Number of Portfolios
Book	1,673,761
Computer file	575
Journal	174,698
Map	10,967
Music	31,640
Visual material	20,177
Grand Total	1,911,818

SOME SOLUTIONS TO PROBLEM #2: DIFFERENCE IN CRITERIA OF STATISTICS

To exclude duplicates:

- Analytics
 - Use Filter
COUNT(DISTINCT
("Bibliographic
Details"."MMS Id"))

Are print volumes reported
by specific
format/language?

- Analytics:
- Include/exclude by
 - Bib: resource type
 - Holding: location
 - Item: material type
 - Item: item policy
 - Bib: language

Branch libraries reported
separately?

- Analytics
 - Holding: library or
location

PROBLEM #3: VOYAGER-MIGRATED-TO-ALMA RELATED OBSERVATIONS

- Loss of granularity: Concept of Owning Libraries + Aggressive combination / deletion of ~ ½ location codes (this may be UK-specific)
- Suppression of Holdings is not indexed in Analytics
- Active/inactive barcodes on item records
- Just an observation: Count of e-resources increased substantially with migration!

SOME SOLUTIONS TO PROBLEM #3: VOYAGER-MIGRATED-TO-ALMA RELATED OBSERVATIONS

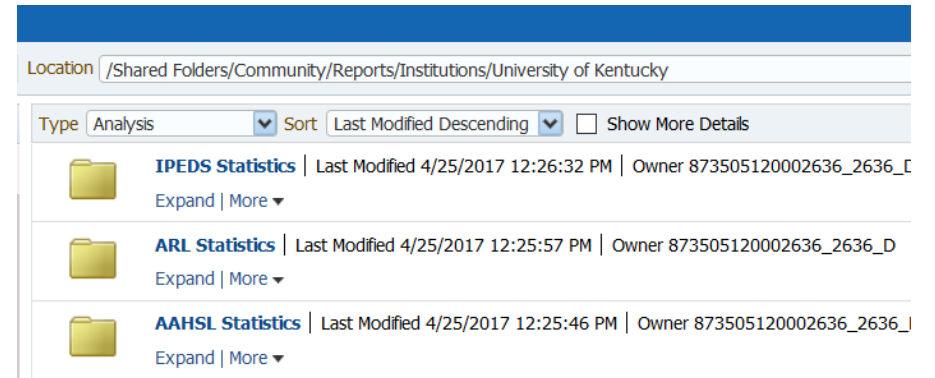
- Owning Libraries: mapped to 901; indexed as one of Local Parameters in Analytics; possibly merge using merge rule(s)
- Suppressed Holdings are not indexed in Analytics : Idea Exchange → 2017 enhancement request!
- Active/inactive barcodes on item records: “Extra barcode” in internal note 2 (advanced search in Alma)

PROBLEM #4: DIFFERENCE IN CRITERIA OF STATISTICS BETWEEN YEARS

- ARL index changed 2006/2007 from volume count by specific format to titles held
- IPEDS 2015/2016: physical volume to physical title counts, number of physical serial volumes and e-serial titles
- → Forced to rethink approach to analyses every year

CLOSING THOUGHTS

- Would love a data dictionary for Analytics!
- Where to find this/more info
 - Most of statistics analyses mentioned are saved in the Shared Community folder in Analytics: Community/Reports/Institutions/University of Kentucky
 - This presentation: Document Repository and <https://works.bepress.com/julene/25/>
 - Email me for UK-specific documents for these agencies (julene.jones@uky.edu)



MY DOCUMENTATION

[ARL Statistics](#)

[Information for questions 1-4 from Julene](#)

(this document saved at N:\Database Integrity\ARL statistics)

Notes:

These statistics only reflect the materials that are cataloged in Alma; they do not include materials available only in Primo, such as [ExploreUK](#), or materials available only in [UKnowledge](#) but not in Alma.

The DDA records are subtracted from these counts.

These Analytics analyses are saved in Julene's folder in Analytics, as well as in the shared UK Folder, as "ARL Statistics (Julene)"

Following recent practice, a count of all titles / volumes in the catalog is created each year, not a count of newly added titles / volumes to be added to the previous year's statistics.

[Question 1: Count of titles held](#)

2 Analytics analyses involved, as well as 2 in Alma advanced search:

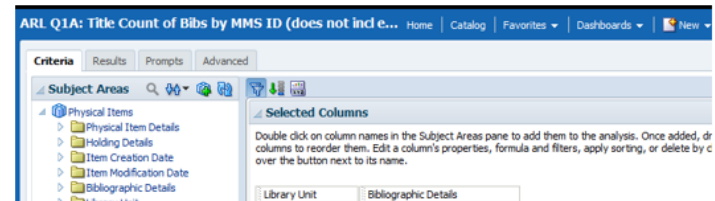
1A: "ARL Q1A: Title count of bibs by MMS ID (does not [incl](#) electronic)"

1A pt.2: Alma count of physical titles with no attached items, and Alma count of physical titles with no attached items in the Law Library

1B: "ARL Q1B: Count of Bibs by Active portfolio (electronic)"

1A: "ARL Q1A: Title count of bibs by MMS ID (does not [incl](#) electronic)"

This analysis counts distinct (non-duplicate) MMS IDs that were created prior to July 1 of the current calendar year. It includes any "in repository" lifecycle bibliographic records, but excludes any titles that are suppressed from [InfokatDiscovery](#) (Primo), or belong to the libraries CELT, Martin Luther King, Engineering Library – Closed, or the library Alma calls "Withdrawn".



HOW ABOUT YOUR INSTITUTION?

- UK Assessment Librarian: do not undertake any assessments without having plans to use the data!
 - Benchmarking
 - Areas of improvement
 - Other ideas?
- Accrediting institutions frequently require institutions to document how effectively the library supports degree programs → is anyone using their annual statistics data to substantiate this?