



Building an Alma Analytics Dashboard for E-Book Usage Data

Summer Durrant, Tim Siegel
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Background

Prior to migrating to Ex Libris' Alma, the University of Mary Washington (UMW) Libraries did not have an electronic resource management (ERM) system to harvest COUNTER usage data.

Reports were pulled on an ad hoc basis and it was difficult to know how e-resources were used over time and across platforms.

	A	B	C	D	E	F	G	H	I
1	Book Report	Number of Successful Section Requests by Month and Title							
2	University of Mary Washington								
3	10751								
4	Period covered by Report:								
5	2018-12-01 to 2018-12-31								
6	Date run:								
7	2/16/19								
8		Publisher	Platform	Book DOI	Proprietary ID	ISBN	ISSN	Reporting Period Total	Dec-18
9	Total for all titles		Grove Music Online					38	38
10	Total for all titles		Oxford Bibliographies					2	2
11	Total for all titles		Oxford Handbooks Online					3	3
12	Total for all titles		Oxford Reference					15	15
13	Total for all titles		Oxford Research Encyclopedias					49	49
14	Total for all titles		Oxford English Dictionary					19	19
15	Total for all titles		Oxford Scholarship Online					62	62
16	Total for all titles		The MIT Press					2	2
17	Total for all titles		University Press Scholarship Online					1	1
18	Total for all titles		University of Chicago Press					6	6
19	Total for all titles		University Press of Florida					1	1
20	Total for all titles		University of North Carolina Press					8	8
21	A Dictionary	Oxford University Press	Oxford Reference			9780198609957		1	1
22	A Dictionary	Oxford University Press	Oxford Reference			9780199653065		3	3
23	A Dictionary	Oxford University Press	Oxford Reference			9780199646241		3	3
24	A Dictionary	Oxford University Press	Oxford Reference			9780199533008		1	1
25	Annals of Na	Oxford University Press	Oxford Scholarship Online			9780190628994		10	10
26	Chocolate Cif	Oxford University Press	University of North Carolina Press			9781469635866		5	5
27	Coleridge an	Oxford University Press	Oxford Scholarship Online			9780198799511		2	2
28	Collective M	Oxford University Press	University of Chicago Press			9780276300704		2	2

Prior to Alma, UMW Libraries downloaded spreadsheets from vendor admin portals, which was time consuming and difficult to make use of the data.



Dashboard Goals

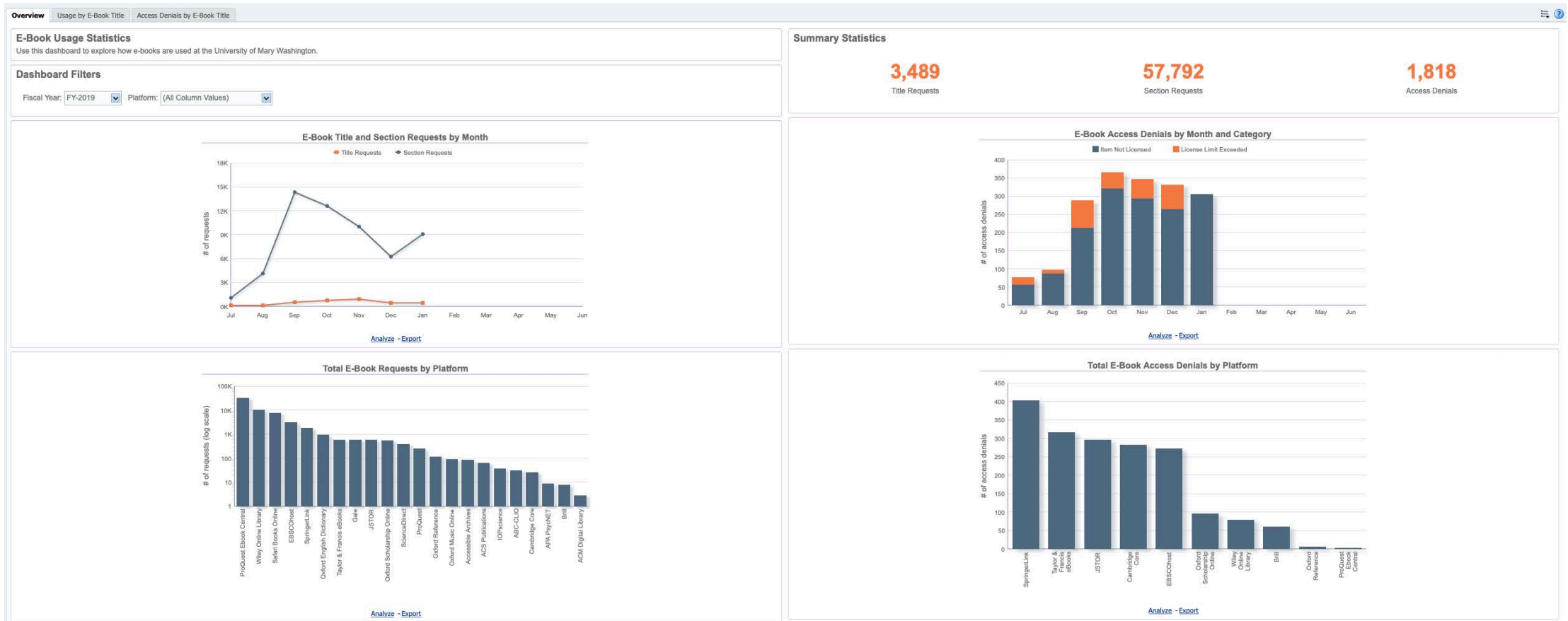
Provide a **quick overview** of how e-books are used **over time** and **across platforms**

Make it **easier** (and faster) to **answer basic questions**: how many times have e-books been used this fiscal year, which platforms are used the most, are users experiencing a high number of turnaways?

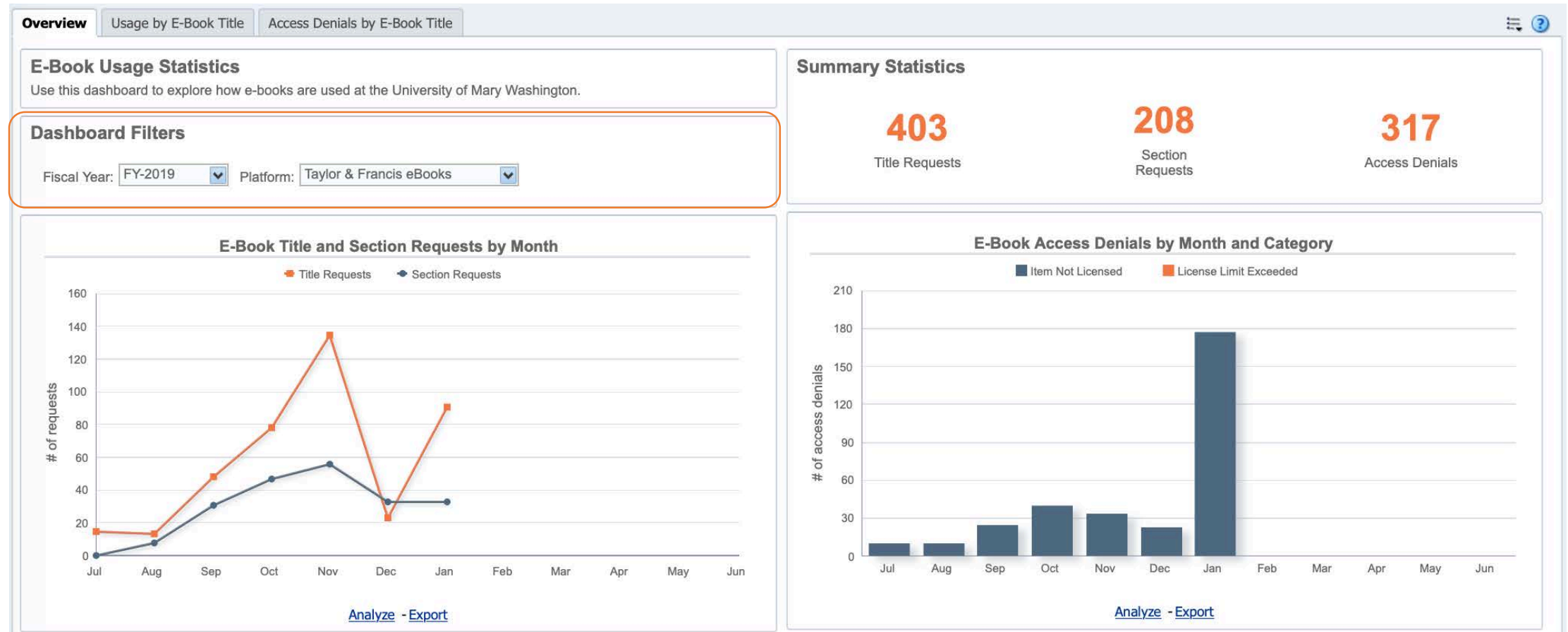
Create effective **visualizations** that reveal **patterns** and **relationships** that might be missed when viewing spreadsheets

Be **easy to use** and **relevant** for library staff

Dashboard Overview



Dashboard Filters



Customizations

The main customization was modifying the appearance of some platform names:

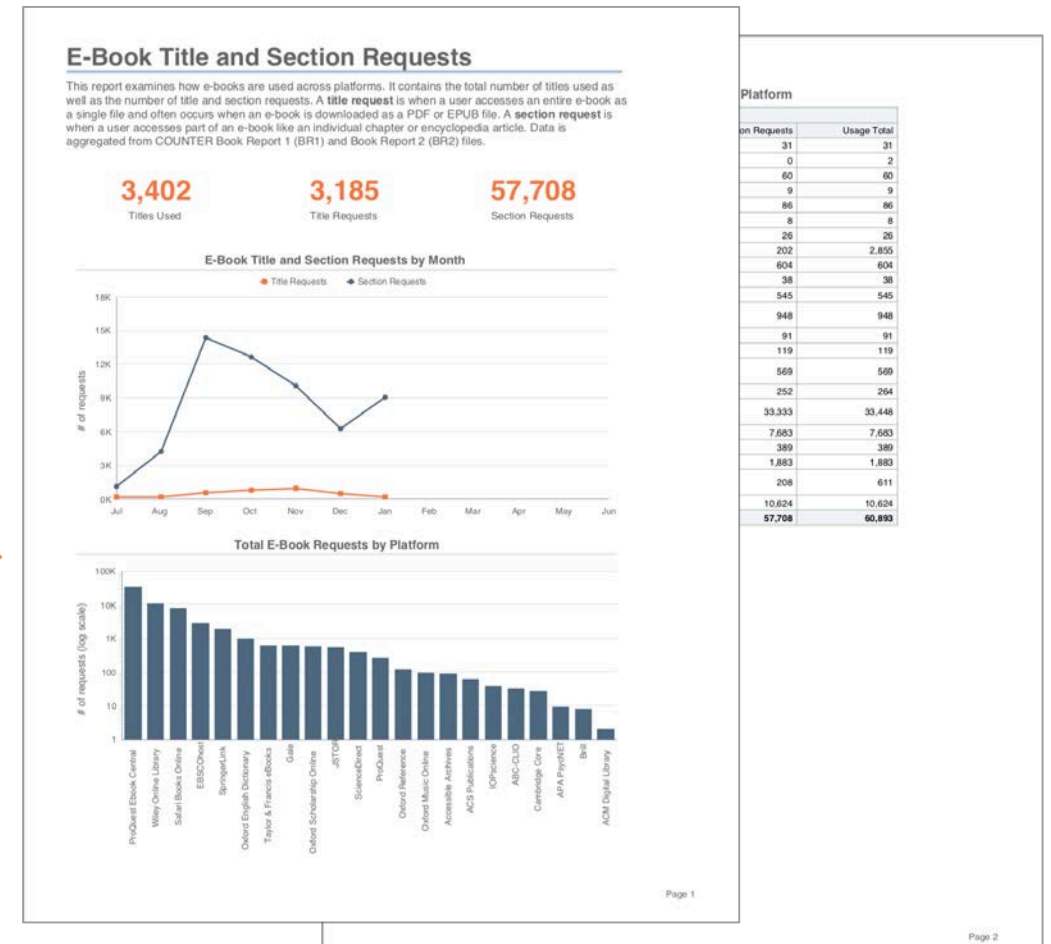
- GOLD -> Gale
- Ithaka -> JSTOR
- ScienceDirect licensed content -> ScienceDirect

This was accomplished by editing the formula for the platform dimension with SQL CASE statements

The image shows a two-part screenshot of a data tool interface. The top part shows a table with columns: Date Fiscal Year, Platform, Title Identifier, and Publisher. A context menu is open over the 'Platform' column, with options: Sort, Edit formula (highlighted), Column Properties, Filter, Delete, and Save Column As. Below the table, text reads 'by clicking on the filter button in the' and 'ved filter'. An orange arrow points from the 'Edit formula' option to the bottom screenshot. The bottom screenshot is the 'Edit Column Formula' dialog box. It has tabs for 'Column Formula' and 'Bins'. Under 'Column Formula', there are fields for 'Folder Heading' and 'Column Heading', both set to 'Platform'. There are checkboxes for 'Custom Headings' (checked) and 'Contains HTML Markup'. The 'Aggregation Rule (Totals Row)' is set to 'Default (None)'. On the left, under 'Available', there is a tree view for 'Subject Areas' with folders like 'Usage Data', 'Platform', 'Publisher', etc. The main area is 'Column Formula', which contains a long SQL CASE statement. The statement maps various platform names to a single 'Platform' value. For example, 'GOLD' is mapped to 'Gale', 'Ithaka' to 'JSTOR', and 'ScienceDirect licensed content' to 'ScienceDirect'. The statement ends with 'END'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Reports

Users can access more in-depth reports directly from the dashboard by clicking on the Analyze button under a graph of interest





Next Steps

Build in more **contextual information**, such as:

- number of e-books on each collection
- cost and cost-per-use statistics
- e-books use by publisher

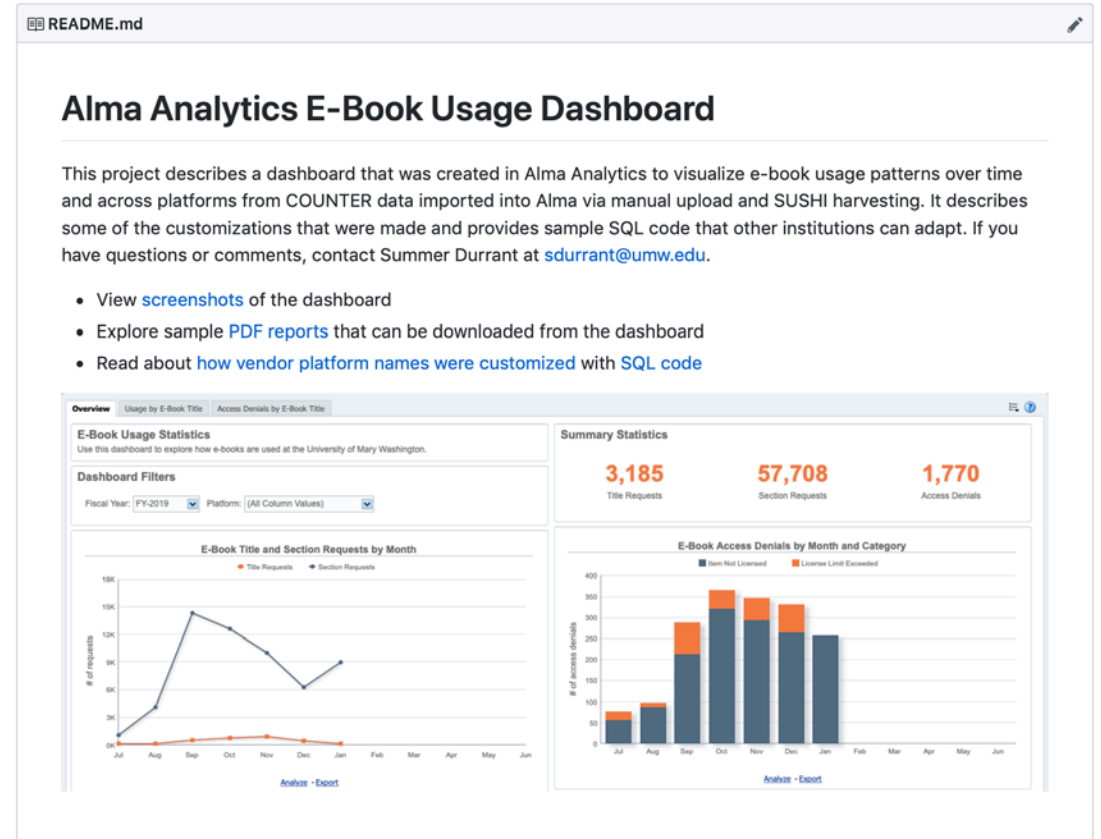
Monitor transition to **COUNTER Release 5**

More Information

More information about the dashboard is available on GitHub, including:

- screenshots
- sample PDF reports
- SQL code

<https://github.com/summerdurrant/ebook-dashboard>



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