Patron Purchase Request

- Patrons and faculty can perform a "Purchase Request" from within the Primo discovery interface
- The purchase requests are automatically entered into a task list in Alma
- The purchase request is an order and once approved enters the standard ordering process

Amazon Integration

- Through the Alma user interface, staff users can fill in a form which automatically searches Amazon and retrieves both bibliographic and ordering information
- Various Amazon sites can be enabled as options, such as Amazon USA, Amazon Germany and Amazon UK

Evidence Based Selection

The Evidence Based Selection model offered by Elsevier is a just-in-time (instead of "just in case"), patron-driven acquisition model that addresses libraries' challenge to deliver instantaneous access to newly released e-books

- Evidence Based Selection is a usage based model
- Provides unlimited access to a selected number of collections during a twelvemonth period for an up-front EBS content and license fee
- The EBS content and license fee represents a percentage of the total value of the selected collections
- At the end of the twelve-month access period, the up-front EBS content and license fee is applied to a final title selection which allows perpetual access to these selected titles

Embedded Analytics Reports

- Reports on non-received issues per vendor will be easily accessible from receiving workbench and from manage items screens
- Vendor management screens will include embedded reports on vendor productivity

Article Processing Charges

Through Alma, the library can facilitate full integration with the Open Access publication fund to claim Article Processing Charges (APCs) for any peer reviewed journal or published conference proceedings

- Staff will fill in and submit the "APC Application form" (as they do today)
- From that point the process will be fully integrated with Alma, including APC fund, order and invoice
- Progress will be communicated to the requester via email

Enhanced Central Negotiations

- Service providers will be able to manage negotiations leading to electronic resource purchase deals in detail
- Service providers will be able to generate reports detailing the deal content to share with interested parties, including parties not using Alma

Management of Shared Electronic Resources

Provide staff working in a consortium with enhanced visibility of shared electronic resources, allowing them to easily view all resources available for their institution

- Shared electronic resources managed in the Network Zone will be searchable from within the institution, and at a later stage also via Analytics
- Staff will be able to see resources managed by the institution and by the consortium centrally, without the need to do multiple searches and combine analytic reports

ProQuest-Ex Libris KB

- Alma Community Zone CKB will be enriched with content from ProQuest New KB.
- Libraries will benefit from expanded Central Knowledge Base content including additional collections, databases and descriptive records, further supporting the acquisition, management and delivery of electronic resources.
- Libraries will benefit from richer content as a result of the Ex Libris and ProQuest collaboration
- ProQuest New KB content will gradually be added to Alma CKB starting with new collections, Zero Title databases and full descriptive records

Single Point of Activation

- Libraries will use Alma as a single point of activation for all electronic resources in Primo Central index and Summon, offering a tighter synergy between Alma and these discovery solutions.
- Libraries will benefit from richer content as a result of the Ex Libris and ProQuest collaboration
- Electronic resources will be activated in Alma • Alma will inform Summon and Primo Central Index of all available electronic resources
- Summon and Primo Central will expose the relevant electronic resources

BIBFRAME

Expand the possibilities for integrating the library with the BIBFRAME initiative by providing catalog data based on BIBFRAME or by using data sources in this format

- Alma will support exporting catalog records in BIBFRAME format
- Alma will support importing catalog records in BIBFRAME format

Cooperative Collection Development

Libraries will be able to leverage the existing Alma customer base to develop their own collections, partnering with other Alma institutions for cooperative collections development

- Provide an easy way to share information about what is in library collections as the basis for collection development partnership

Overlap Across Format Types

- Analyses can include both physical and electronic holdings
- Libraries will be able to optimize their collections and budget through overlap analyses of resources across formats and inventory types
- The existing overlap analysis tool enables comparing content of electronic resources to detect duplicate electronic titles within the library repository • With this new feature it will be possible

to detect duplication of titles between electronic resources and print material, potentially preventing unnecessary expenditures

Benchmark Analytics

- Libraries will be able to compare their collection's holdings to libraries with a similar profile in order to make collection development decisions
- Collections can be compared across classification areas to review strengths or deficits
- This will allow the institution to make informed decisions regarding collection development and resource sharing
- Libraries will benefit from the extensive Ex Libris/ProQuest customer base
- Libraries will participate in benchmark analysis anonymously, using profile characteristics like budget, global region, collection size, number of FTEs, etc.
- Libraries will select the profile against which they want to compare resources and then identify a target classification
- Libraries will be able to compare print and electronic resources holdings
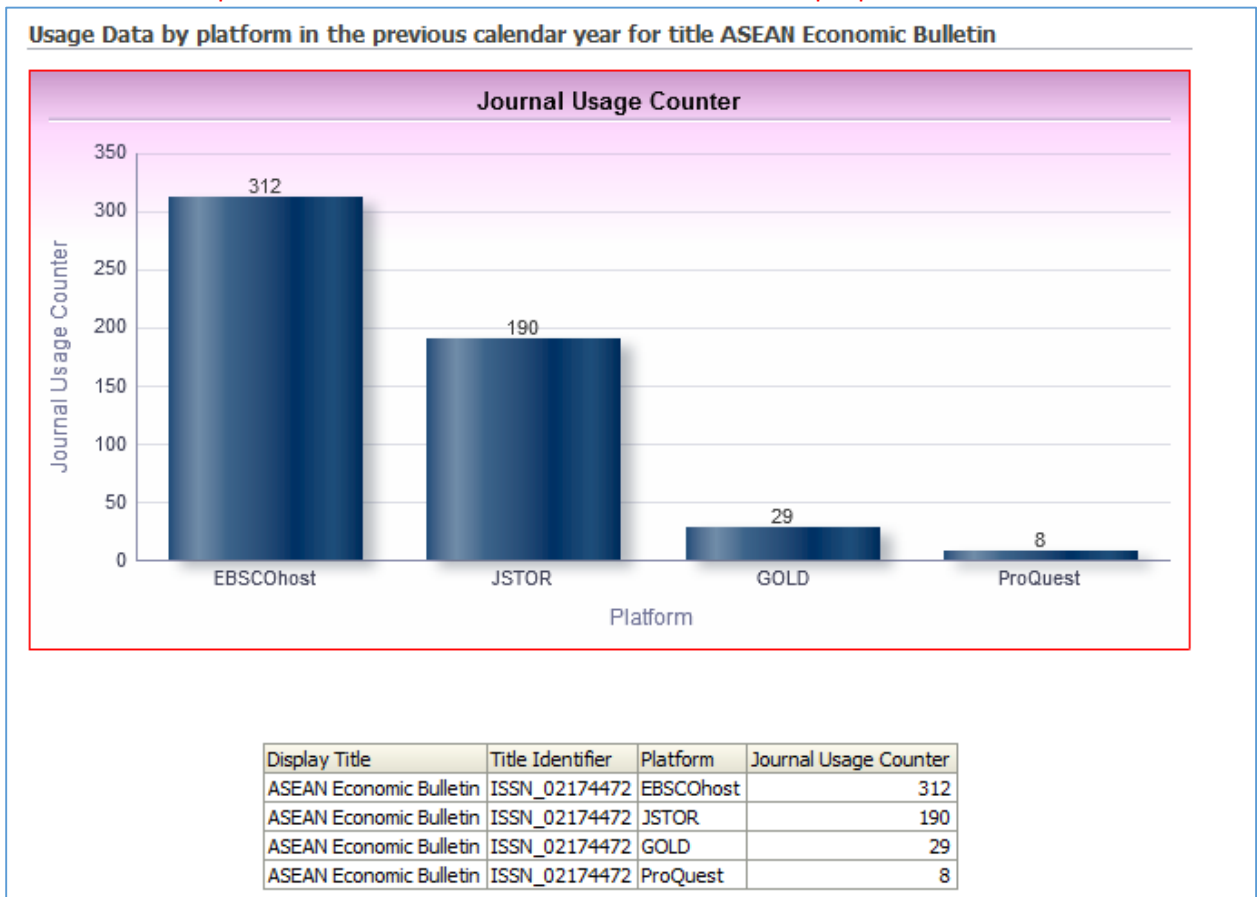
Data Retrieval Functions

1. Data Retrieval Service - customer maintains the log-ins and someone (ExL staff or the existing PQWS folks) retrieves the COUNTER reports twice per year and loads them. Also load data from non-COUNTER compliant vendors.
The library loads the COUNTER report data, not (as the question infers) "someone (Ex Libris staff or the existing PQWS folks)". It is way more than twice a year. The SUSHI harvesting is weekly and can also be done "on demand" if desired. The manual uploading is "whenever you want"

2. Intota and USTAT show usage of the same title available on different platforms. This is very helpful for determining whether usage of a title comes from the holdings in a database such as Academic Complete (with an embargo period of 12 months) or from the subscription you maintain to get access to the 12 months of content that isn't available due to the embargo.
Alma analytics can also show one title and usage on several different platforms. Here is a screenshot of a report for title 'ASEAN Economic Bulletin' with multiple platforms

Usage Data by platform in the previous calendar year for title ASEAN Economic Bulletin

Display Title	Title Identifier	Platform	Journal Usage Counter
ASEAN Economic Bulletin	ISSN_02174472	EBSCOhost	312
ASEAN Economic Bulletin	ISSN_02174472	JSTOR	190
ASEAN Economic Bulletin	ISSN_02174472	GOLD	29
ASEAN Economic Bulletin	ISSN_02174472	ProQuest	8

3. SUSHI service - clear error reports and ability to correct and then re-harvest.
Yes, data can be uploaded and then deleted and then re-uploaded. Here is a clear error message

Usage Data Loader

⚠ Error in row 1 column 1 : invalid report type description Number of Successful Full-Text Requests from an Archive by Month and Journal found. Expected value : Number of Successful Full-Text Article Requests by Month and Journal

Here I will choose to delete uploaded data

	File Name	Vendor	Upload Date	Uploading User	Subscriber	Status	
Status	All Files	Subscriber	All	Upload Date	Uploaded in the Last Month		1 - 3 of 3 Records	Columns ▼	Tools

	File Name	Vendor	Upload Date	Uploading User	Subscriber	Status	
1	DB1 no quotes row 10 col 4 fixed.xlsx	GALE CENGAGE LEARNING	10 Jun 2016 13:25:54	exl_support	The YILIS Institute	Fully processed	Actions
							View
							Download
							Delete

Here will get a message asking for confirmation and explaining what it will do

Confirmation Message

This action will delete the file and its loaded data - Are you sure you want to continue?
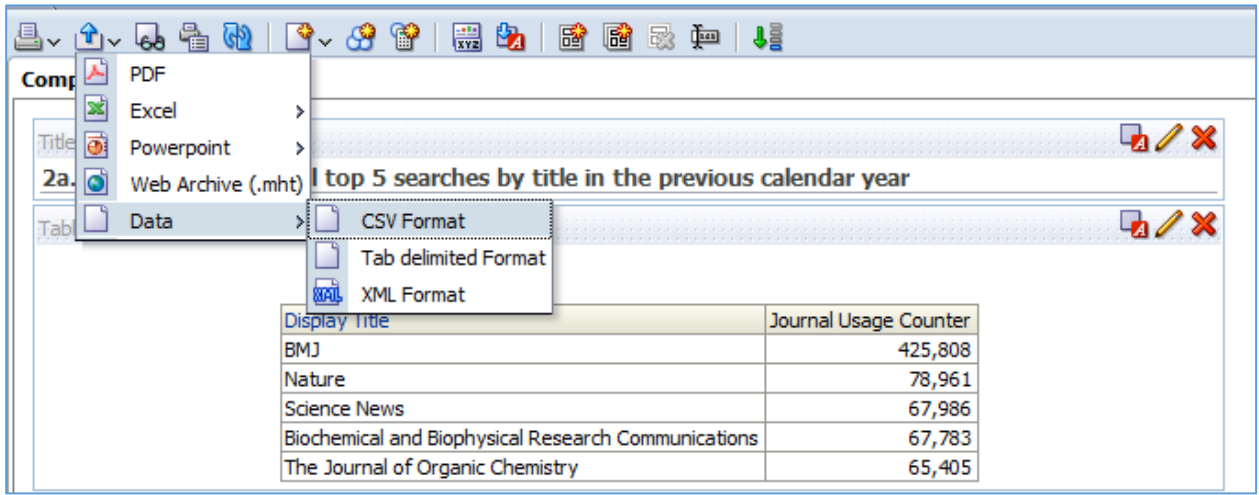
Cancel   **Confirm**

4. Duplication safeguards - if the same report is uploaded more than once, or duplicated by a SUSHI harvest, the stats are not duplicated within Analytics
   If a user tried to upload duplicate data they get a message: The following overlapping data was found. Note that this data will be deleted if you continue with the current download process.

Confirmation Message

The following overlapping data was found. Note that this data will be deleted if you continue with the current download process.

Cancel   **Confirm**

5. Ability to download raw reports from Analytics for local use
Yes this can be done and it can be done in a wide variety of formats.

See also the following two presentations at
https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Overview_Materials/Presentations_and_Documents

Analytics - Sample library measures and KPIs using Alma Analytics.pptx
Analytics - Overview of Usage Data subject area.pptx

6. Ability to upload reports to Analytics, including reports that have been downloaded from Analytics and changed/corrected/amended
It is not possible to upload data directly to Alma analytics. The data comes to Alma Analytics via Alma. In the case of the usage data: COUNTER reports are loaded to Alma, then from Alma there is a daily ETL to Alma analytics.

7. Ability to view the harvested or uploaded reports within the Analytics interface for troubleshooting
Yes, this is possible. You can also view the specific reports in the Alma interface and in the case of "trouble shooting" it is recommended to use the Alma interface. Here is a report of an uploaded COUNTER report. Note the "View" and "download" options form the 'actions' menu. 'Download' will 'download' the COUNTER report which was uploaded.

File Details

File Name:	CounterJR1-R4.xlsx
File Type:	XLSX
Upload Method:	MANUAL
Report Type:	JR1
Data Start Date:	Jan 2012
Data Creation Date:	10 Oct 2013
Uploading User:	exl_support
Upload Date:	10 Jun 2016 11:23:59
Counter Subscriber:	SAMPLE UNIVERSITY
Subscriber:	The YILIS Institute

Status:	Fully processed
Upload Time:	8 min 57 sec
Counter Release:	R4
Data End Date:	Dec 2012
Number of Records:	100

Platform/Publisher Information

	Platform	Publishers
1	JSTOR	Academy of Management Allen Press Incorporated American Association for the Adv Portuguese American Economic Association American Political Science Association Publishing Ltd. BMJ Publishing Group Botanical Society of America Incorporated<br

8. Authority title matching to reduce duplicate listings and ensure statistics are properly associated with titles held on multiple platforms; ability to manually match titles where automated matching has been unsuccessful (some vendors don't provide adequate matching information in their reports)

There is no ability to manually match titles. We have not encountered situations where this has been needed. Here is how we match:

9. Ensure that ISSNs are consistently loaded in with 8 characters and include leading zeros.
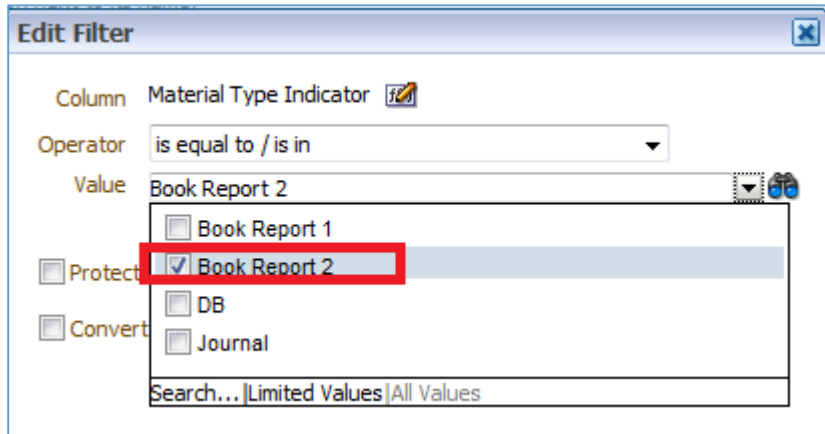
Reporting Functions

1. Incorporate data from Books in Print, Resources for College Libraries, and Ulrich's
   On the roadmap

2. Intota assessment can include usage for Open Access journals, or on open access articles inside non-open access journals.
   Alma can get usage for data which comes from COUNTER reports. Alma can also get usage from the Alma Link resolver.

3. Overlap analysis: journals, e-books and streaming as currently on the Intota development timeline. Including functionality to check against external collections and un-owned packages, and overlap analysis based on dates of coverage
   Overlap analysis can be done already. It can be done on collections owned by the library (portfolios in multiple collections) and it can be done in Alma analytics. In Q4 2016 it will be possible to check overlap with portfolios / collections in institution and in Community Zone. It is also possible in Alma and in Alma analytics to create reports on "duplicate titles" (titles with inventory both physical and electronic).

4. Ability to include/exclude platform & access fees from cost per use reports
   The price is taken from the invoice lines of the POL and cannot be selectively removed. See https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Overview_Materials/Presentations_and_Documents
   files: Analytics - Overview of calculation of the cost per use in the Cost Usage subject area with DB and JR1.pptx and Analytics - Overview of Usage Data subject area.pptx

5. Intota's planned proportional pricing enhancements to provide more accurate title costs across a package
   The Alma method of determining cost per use is very exact and precise. See file "Analytics - Overview of calculation of the cost per use in the Cost Usage subject area with DB and JR1.pptx" referred to above at:
   https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Overview_Materials/Presentations_and_Documents

Desired functions not currently in Intota and unknown with regard to Alma Analytics:

1. "Out-of-the-box" reports corresponding to all collections questions for the major surveys
   a. Most of them are now available, but a few of the trickier ones like title count are not
      Alma analytics has a very vast, well used and proven set of OOB reports.

2. automated collection analyses to aid in decision making, including benchmarking. May be part of ExL's KPI work.
   Overlap analysis (portfolios in collections) and duplicate titles (physical and electronic) we have. Benchmarking and KPIs are on the roadmap

3. Clearly identify BR2 (e-book usage) report "Section Type" (e.g. chapter, section, page, etc.)
   Here is a report of display titles for BR2 with the "Book Success Section Requests"

Edit Filter		
Column	Material Type Indicator	
Operator	is equal to / is in	
Value	Book Report 2	

Book Report 1
☑ Book Report 2
DB
Journal

Search... |Limited Values|All Values

Material Type Indicator	Book Success Section Requests	Display Title
Book Report 2	10,219	Anthropology, Culture and Society : Anthropology and Deve...
	10,751	Beginning University : Thinking, Researching and Writing ...
	4,702	Electronic Reporter : Broadcast Journalism in Australia
	4,486	Guyton Physiology : Guyton and Hall Textbook of Medical P...
	43,313	Methods of IT Project Management (2nd Edition)
	5,292	Political Anthropology : An Introduction (3rd Edition)
	8,151	Principles and Practice of Sleep Medicine (Fifth Edition)
	14,755	Rang and Dale's Pharmacology : with STUDENT CONSULT Onlin...
	5,190	Total for all titles
	7,023	Toxicology Handbook (2nd Edition)

4. User-configurable adjuster for estimated average chapter length to allow better comparison between e-book platforms that report BR2 usage by page vs by chapter
   a. This would allow for more realistic "top performers" or cost-per-use reports across the collection
   b. As it currently stands, the usage stats from aggregators like PQ and EBSCO, as well as encyclopedias and similar reference titles, overwhelm and hide the usage from PDF-chapter-oriented platforms (JSTOR, MUSE, most publisher sites)
      This does not exist and is not currently on the roadmap

5. Development plans include creating a place to store, manage and use data from non-bibliographic services (study room usage, lib instruction sessions, etc.) in various analyses.
   It is not possible to upload data directly to Alma analytics. The data comes to Alma Analytics via Alma. In the case of the usage data: COUNTER reports are loaded to Alma, then from Alma there is a daily ETL to Alma analytics.