# Analytics Webinar – ACRL reporting

## Note regarding which system to use:

* For 2015-16 (September 2016 survey): Use your old systems and test in Alma for practice
* For 2016-17 (current year, September 2017 survey): Use your old systems and practice in Alma
	+ Exceptions:
		- Combine circulation data ***from old system*** (July 1 – cutover) + Alma (cutover – June 30)
		- UStat users: use Alma for questions requiring COUNTER usage data
		- 360 Counter users: use whichever system has the most complete data
	+ Recommendation: gather data for 2016-17 FY ACRL/IPEDS questions during technical freeze
* For 2017-18 (September 2018 survey): Use Alma

## Alma Analytics

**Role required:** Design Analytics

How to get there:

* Click the Alma button and choose Design Analytics in the far right-hand column
* Click on Catalog in the menu bar at the top



**THEN FOLLOW THIS SPECIFIC PATH:**

**Shared Folders > Community > Reports > Shared Reports > Institutions > CalState >**

**FOR TESTING ONLY ACRL queries**

Note: The Community area contains many duplicate and outdated folders. This folder has the most current versions.

## Notes

* **Reports are currently set with a filter already in place for 2016**
	+ This can be manually adjusted for the desired fiscal year
	+ If you didn’t migrate acquisitions data, expenditure reports will produce zero results when you run it for 2016
		- To test these reports, change your fiscal year to 2017 and it will report expenditures in Alma during your test period
	+ Hopefully later iterations of this report will prompt for fiscal year
* **Reports using data from Alma generally use the Alma fiscal year**
	+ Each campus can configure fiscal year individually
		- For best results, **ALWAYS check and correct any fiscal year filter**
	+ Fiscal year dates starting with letters (e.g. FY-2016) are at the end of the list of dates
	+ **COUNTER usage fiscal year matches the institution fiscal year but isn’t labeled the same way**
		- Usage Date fields are the same as Loan Date
		- e.g. 2016 = July 2015 – June 2016
* **ACRL questions where you will need to follow up or can’t easily use Alma**
	+ Line 20-21 Expenditures
		- Alma will report what you spent during the fiscal year
			* If you need to divide a single expenditure over multiple years, you must manually correct for this
	+ Line 41 Number of Databases
		- Alma can give you a count of Electronic Collections, but…
			* It probably won’t conform to the ACRL definition
			* It probably will over-count if multiple packages are activated from the same provider
				+ e.g. Springer Engineering eBooks 2014, Springer Engineering eBooks 2015, etc.
		- Better bet: use some combination of your library’s Databases A-Z list and an Alma repository search for Electronic Collections available to you in the NZ and IZ
	+ Line 60 column 1 Initial Circulation Physical
		- **Very Important:** This query technique will only work accurately for circulation that happens AFTER go-live. Item data that is migrated into Alma from Millennium (and probably Sierra–needs testing) will only contain the most recent circulation action, so titles will show as having circulated during a given fiscal year, but will only show as circulating ONCE.
		- Use your OLD ILS for ACRL/IPEDS circ stats for FY 15-16 AND FY 16-17 (use Alma to count any loans/renewals between cutover and the end of the fiscal year).
		- Use Alma for ACRL/IPEDS circ stats beginning FY 17-18 (the first full year in production).
	+ Line 60 column 2 Initial Circulation Digital/Electronic
		- ACRL and IPEDS want streaming media usage as well as e-journals and e-books
		- Alma does not yet support COUNTER MR1 and MR2
		- Streaming media platforms haven’t widely adopted COUNTER in any case
		- You’ll need to start with the Alma Analytics report and add whatever e-media usage you have to the total