



# Drilling Down in Alma Analytics

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# Overview

This presentation will cover:

What "drilling down" is (in terms of reports)

How to create drill down reports

Where we currently use them



# What are "drill down queries"?

- They create reports that allow librarians to reveal the items "behind the numbers" and link to the record in Primo
- These reports also allow librarians to more efficiently fix classification issues
- They're fun to set up!

Compound Layout

Print Table

| Bibliographic Details - Resource Type | Bibliographic Details - Material Type | Portfolio - Material Type | Is Free | Title Count MMS Id |        |           |         |  | FY-2022 Total |  |
|---------------------------------------|---------------------------------------|---------------------------|---------|--------------------|--------|-----------|---------|--|---------------|--|
|                                       |                                       |                           |         | FY-2022            |        |           |         |  |               |  |
|                                       |                                       |                           |         | July               | August | September | October |  |               |  |
| 2D non-projectable graphic - Physical | Visual material                       | Streaming Video           | No      |                    |        |           |         |  | 1             |  |
| Book - Electronic                     | Book                                  | Book Titles               | Yes     | 14,200             | 395    | 271       | 4,958   |  |               |  |
|                                       |                                       | Di... Collections         | Yes     | 284                | 734    | 664       | 485     |  |               |  |
|                                       |                                       | Proceeding                | Yes     | 1                  |        |           |         |  |               |  |
|                                       |                                       | Report                    | No      |                    |        | 1         | 1       |  |               |  |
|                                       |                                       | Unknown                   | No      | 43                 | 2      | 1         | 10      |  |               |  |
|                                       |                                       |                           | Yes     | 5                  | 3      | 5         | 14      |  |               |  |

| Electronic Collection Public Name        | Bibliographic Level | MMS Id          | Title  |
|--|---------------------|-----------------|--|
| EBSCOhost Purchased Ebooks               |                     |                 |  |
| ACM Conference Proceedings               |                     | 997471110605211 | Proceedings of the International Conference on Research in Adaptive and Convergent Systems |
| American Chemical Society Legacy Archive |                     | 997471110705211 | Proceedings of the International Conference on Advanced Visual Interfaces                  |
| CREDOREference Academic Core             |                     | 997471110805211 | Proceedings of the Annual Symposium on Computer-Human Interaction in Play                  |
|  |                     | 997471110905211 | Proceedings of the ACM Turing  |

# A Tale of Two ILS's

## Voyager

- Our ILS since 2003
- Full SQL access to the data
- Used Cold Fusion to create "drill downs"

## Alma/Primo VE

- In 2019, we migrated to Alma/Primo VE
- Alma Analytics is built on the Oracle Business Intelligence platform (very powerful)
- We do NOT have full access to the data

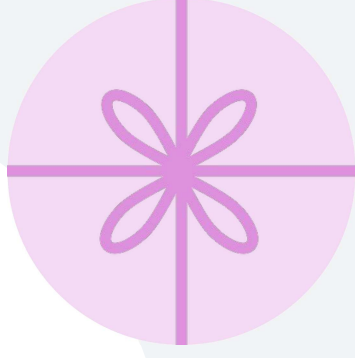
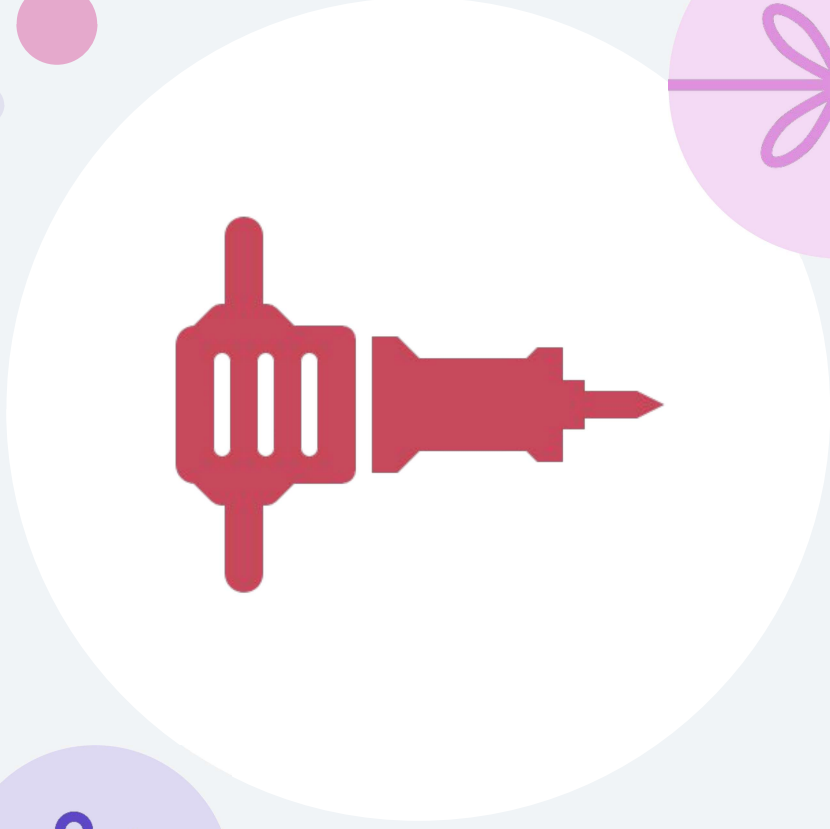
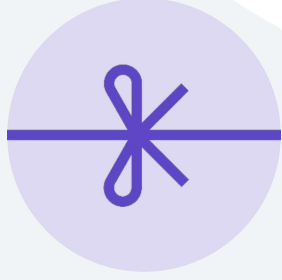
Circulation by Location and Item Type - MONTHLY Report from Jul 01, 2018 to Jul 31, 2018 - 663

| Item Perm Location    MFHD Location    Item Temp Location    Item Type | Number of Charges |
|--|-------------------|
| 2ndFloor   |                   |
| ResDesk / J.T. Book  | 1                 |
| 2ndFloor / ResDesk / J.T. Book   | 6                 |
| 2ndFloor / J.T. Book   | 206               |
| 2ndFloor / J.T. BookDisk   | 7                 |
| 2ndFloor / J.T. Score  | 6                 |
| 2ndFloor / J.T. Score  | 226               |
| CMC  |                   |
| CMC / J.T. Juvenile  | 90                |
| CMC / J.T. TeachAid  | 17                |
| CMC / J.T. Textbook  | 7                 |
| CMC / J.T. Textbook  | 114               |
| HobartHall   |                   |
| HobartHall / J.E. HobartEquipment                                      | 207               |
| HobartHall / J.E. Laptop   | 1                 |
| HobartHall / J.T. Book   | 1                 |
| HobartHall / J.T. Book   | 209               |
| ILLBook / J.T. ILL-Book  | 31                |
| ILLBook  |                   |
| ILLBook / J.T. ILL-Book  | 31                |
| LendServ   |                   |
| 47 / J.E. AudioCD  | 1                 |
| 47 / ResDesk / J.E. DVD  | 3                 |
| 47 / J.E. DVD  | 10                |
| McNaughton   |                   |
| McNaughton / J.T. Book/McNaughton                                      | 14                |
| McNaughton / J.T. Book/McNaughton                                      | 6                 |



Example of a monthly report that we created in 2018 (shortly before our migration to Alma/Primo VE)

**Can we drill  
down with  
Alma?**



**If so, how?**

# A brief how to....



# End result

Compound Layout

Pivot Table

| Bibliographic Details - Resource Type | Bibliographic Details - Material Type | Portfolio - Material Type | Is Free | Title Count MMS Id |        |           | No. of Portfolio (In Repository) |        |         |           |               |       |        |  |   |
|---------------------------------------|---------------------------------------|---------------------------|---------|--------------------|--------|-----------|----------------------------------|--------|---------|-----------|---------------|-------|--------|--|---|
|                                       |                                       |                           |         | FY-2022            |        |           | FY-2022 Total                    |        | FY-2022 |           | FY-2022 Total |       |        |  |   |
|                                       |                                       |                           |         | July               | August | September | October                          | July   | August  | September | October       |       |        |  |   |
| 2D non-projectable graphic - Physical | Visual material                       | Streaming Video           | No      |                    |        |           | 1                                |        |         |           |               |       |        |  | 1 |
| Book - Electronic                     | Book                                  | Titles<br>Collections     |         | 14,200             | 395    | 271       | 4,958                            | 19,822 | 14,250  | 402       | 272           | 5,061 | 19,985 |  |   |
|                                       |                                       |                           |         | 284                | 734    | 664       | 485                              | 1,986  | 311     | 778       | 735           | 546   | 2,370  |  |   |
|                                       |                                       |                           |         |                    |        |           | 1                                | 1      |         |           |               |       | 1      |  |   |

| Electronic Collection Public Name        | Bibliographic Level | No. of Portfolio (In Repository) |
|--|---------------------|----------------------------------|
| EBSCOhost Purchased Ebooks               | m                   | 1                                |
| ACM Core<br>Titles                       | m                   | 356                              |
| American Chemical Society Legacy Archive | m                   | 1,525                            |
| CREDOreference Academic Core             | m                   | 19                               |

| Electronic Collection Public Name | Bibliographic Level | MMS Id          | Title  | Portfolio Activation Date |
|-----------------------------------|---------------------|-----------------|--|---------------------------|
| ACM Digital Library Complete      | m                   | 997471110605211 | Proceedings of the International Conference on Research in Adaptive and Convergent Systems | 8/2/2021                  |
|                                   |                     | 997471110705211 | Proceedings of the International Conference on Advanced Visual Interfaces                  | 8/2/2021                  |
|                                   |                     | 997471110805211 | Proceedings of the Annual Symposium on Computer-Human Interaction in Play                  | 8/2/2021                  |
|                                   |                     | 997471110905211 | Proceedings of the ACM Thirteenth  | 8/2/2021                  |

# Creating reports in Alma Analytics

- Must have the correct "role" to get access to analytics
- Alma menu (side navigation)
  - Analytics
  - **Design Analytics:** where to create/edit/store analytics reports
  - **Reports:** if you schedule these reports to get sent out via email, this is where they appear





| Bibliographic Details - Resource Type     | Bibliographic Details - Material Type | Portfolio - Material Type | Is Free | Title Count MMS Id |        |           |               |               | No. of Portfolio (In Repository) |        |           |               |               |     |     |  |  |  |  |     |
|---|---------------------------------------|---------------------------|---------|--------------------|--------|-----------|---------------|---------------|----------------------------------|--------|-----------|---------------|---------------|-----|-----|--|--|--|--|-----|
|   |                                       |                           |         | FY-2022            |        |           | FY-2022 Total |               | FY-2022                          |        |           | FY-2022 Total |               |     |     |  |  |  |  |     |
|   |                                       |                           |         | July               | August | September | October       | FY-2022 Total | July                             | August | September | October       | FY-2022 Total |     |     |  |  |  |  |     |
| Journal (Ceased publication) - Electronic | Journal                               | Book                      | No      | 3                  |        |           |               |               |                                  |        |           |               |               |     |     |  |  |  |  | 3   |
| Journal - Electronic                      | Journal                               | Journal                   | No      | 2                  | 1      | 4         | 25            |               |                                  |        | 32        | 2             | 1             | 5   | 26  |  |  |  |  | 34  |
|   |                                       |                           | Yes     | 1                  | 3      | 3         | 5             |               |                                  |        | 15        | 1             | 6             | 3   | 4   |  |  |  |  | 14  |
|   |                                       |                           | No      | 7                  | 7      | 7         | 1             |               |                                  |        | 79        | 83            |               |     |     |  |  |  |  | 84  |
|   |                                       |                           | No      | 137                | 59     | 55        | 329           |               |                                  |        | 577       | 141           | 66            | 57  | 336 |  |  |  |  | 600 |
|   |                                       |                           | Yes     | 178                | 209    | 175       | 244           |               |                                  |        | 805       | 178           | 209           | 175 | 243 |  |  |  |  | 805 |
|   |                                       |                           | No      | 1                  |        |           | 1             |               |                                  |        | 2         | 1             |               |     | 1   |  |  |  |  | 2   |

# Column Properties

This screenshot shows the main 'Column Properties' dialog box. At the top, there are tabs for 'Selected Columns', 'Portfolio', 'Bibliographic Details', and 'Bibliographic Details'. Below the tabs, there are several filter and action buttons: 'No. of Portfolio (In Repository)', 'Is Free', 'Title Count MMS id', 'Sort', 'Edit formula', 'Column Properties', 'Filter', 'Delete', and 'Save Column As'. The main area contains a list of filters, with the following text visible: '\*Bibliographic Details\*', '\*Bibliographic Level\*' NOT IN ('', 's') AND 'Suppressed From Discovery' is equal to / is in No AND 'Bibliographic Lifecycle' is equal to / is in In Repository AND 'Availability' is not equal to / is not in Not Available AND 'Portfolio Activation Fiscal Year' is greater than or equal to FY-2022.

This screenshot shows the 'New Action Link' dialog box, which is a sub-dialog of the 'Column Properties' dialog. It has a title bar 'New Action Link ...' and a close button. The dialog is divided into several sections: 'Link Text' (with a dropdown menu set to 'Collections'), 'Action' (with radio buttons for 'Always' and 'Conditionally'), and 'Show Link' (with radio buttons for 'Do not display in a popup if on' and 'Enable on Totals'). At the bottom, there are three icons with labels: 'Navigate to BI Content', 'Navigate to a Web Page', and 'Invoke a Web Service'. The 'Navigate to BI Content' icon is highlighted with a red box.

| Bibliographic Details - Resource Type     | Bibliographic Details - Material Type | Portfolio - Material Type | Is Free | Title Count MMS Id |        |           |         | No. of Portfolio (In Repository) |        |           |         |               |               |
|---|---------------------------------------|---------------------------|---------|--------------------|--------|-----------|---------|----------------------------------|--------|-----------|---------|---------------|---------------|
|   |                                       |                           |         | FY-2022            |        | FY-2022   |         | FY-2022                          |        | FY-2022   |         |               |               |
|   |                                       |                           |         | July               | August | September | October | July                             | August | September | October | FY-2022 Total | FY-2022 Total |
| Journal (Ceased publication) - Electronic | Journal                               | Book                      | No      | 3                  |        |           |         | 3                                | 3      |           |         | 3             | 3             |
|   |                                       | Journal                   | No      | 2                  | 1      | 4         | 25      | 32                               | 2      | 1         | 5       | 26            | 34            |
|   |                                       |                           | Yes     | 1                  | 6      | 3         | 5       | 15                               | 1      | 6         | 3       | 4             | 14            |
| Journal - Electronic                      | Journal                               | Book                      | No      | 78                 |        |           | 1       | 79                               | 8°     |           |         | 1             | 84            |
|   |                                       | Journal                   | No      | 137                | 59     | 55        | 329     | 577                              | 14     | 57        | 336     | 600           |               |
|   |                                       |                           | Yes     | 178                | 209    | 175       | 244     | 805                              | 17     | 175       | 243     | 805           |               |
|   |                                       | Newspaper                 | No      | 1                  |        |           | 1       | 2                                | 1      | 1         | 1       | 2             |               |

Titles

8°

577

14

57

336

600

805

17

175

243

805

1

2

1

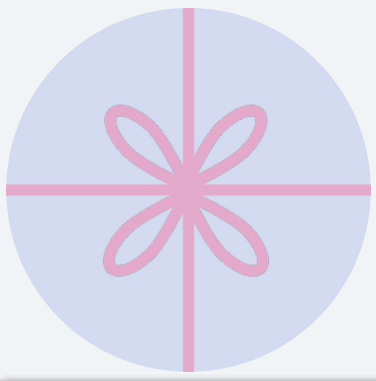
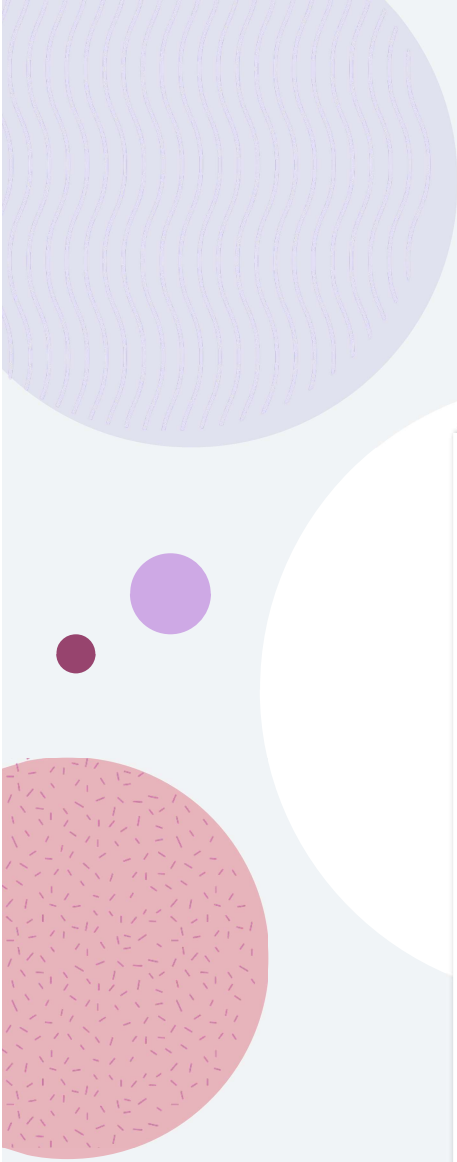
2

# How to create links in Drill Down title reports --> Primo

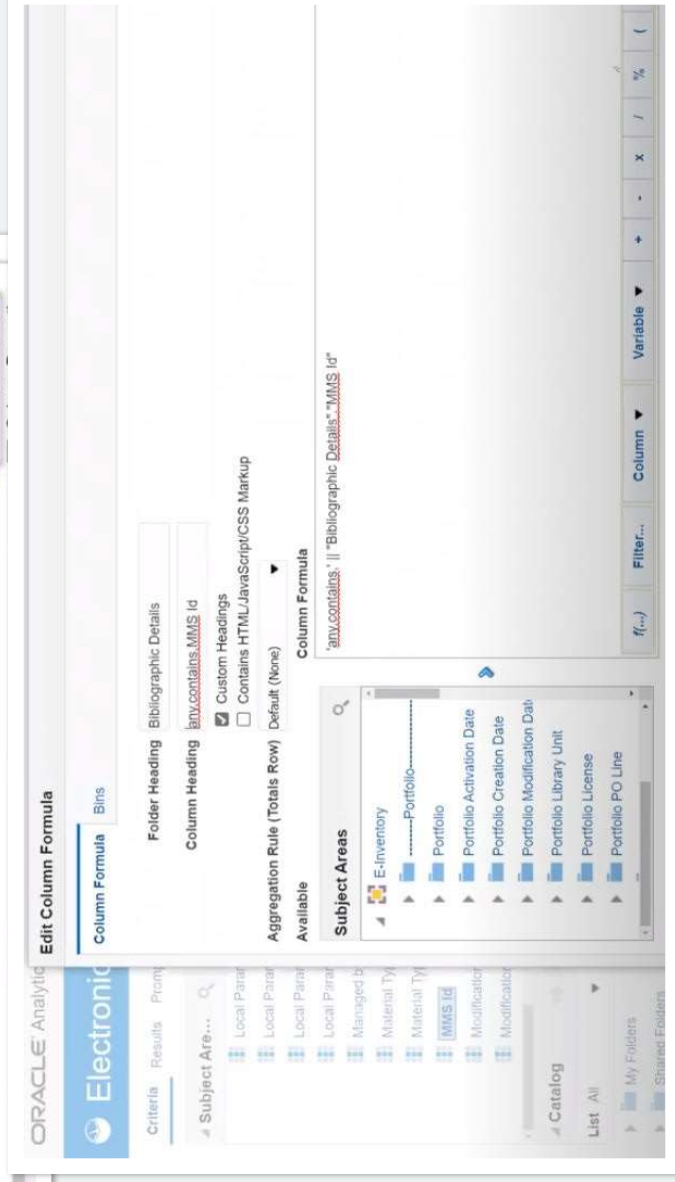
The screenshot displays the Primo interface for an 'Electronic Title Portfolio Serial...'. The main content is a 'Compound Layout' table with the following columns: Bibliographic Details - Resource Type, Bibliographic Details - Material Type, Portfolio - Access Free Type, PDA Name, License Status, License Name, Electronic Collection Public Name, MMS Id, and Title. The table contains three rows of data.

| Bibliographic Details - Resource Type     | Bibliographic Details - Material Type | Portfolio - Access Free Type | PDA Name | License Status | License Name | Electronic Collection Public Name                                       | MMS Id          | Title   |
|---|---------------------------------------|------------------------------|----------|----------------|--------------|---|-----------------|---|
| Journal (Ceased publication) - Electronic | Journal                               | No                           | None     |                |              | EBSCOhost American Antiquarian Society Periodicals Collection: Series 1 | 997377460005211 | The Euterpeiad or, musical intelligence: devoted to the diffusion of musical information and belles lettres |
|   | Book                                  |                              |          |                |              |   | 997377464105211 | Musical Journal for the piano forte   |
|   |                                       |                              |          |                |              |   | 997377469805211 | The review  |
|   |                                       |                              |          |                |              | EBSCOhost American Antiquarian Society                                  | 997372715605211 | The collegian   |
|   |                                       |                              |          |                |              |   | 997374912205211 | The American museum of science, literature  |

The interface also shows a left-hand navigation pane with options like 'E-Inventory', 'Portfolio', and 'Catalog'. The top navigation bar includes 'Criteria', 'Results', 'Prompts', and 'Advanced'.



# Column Formula Customization



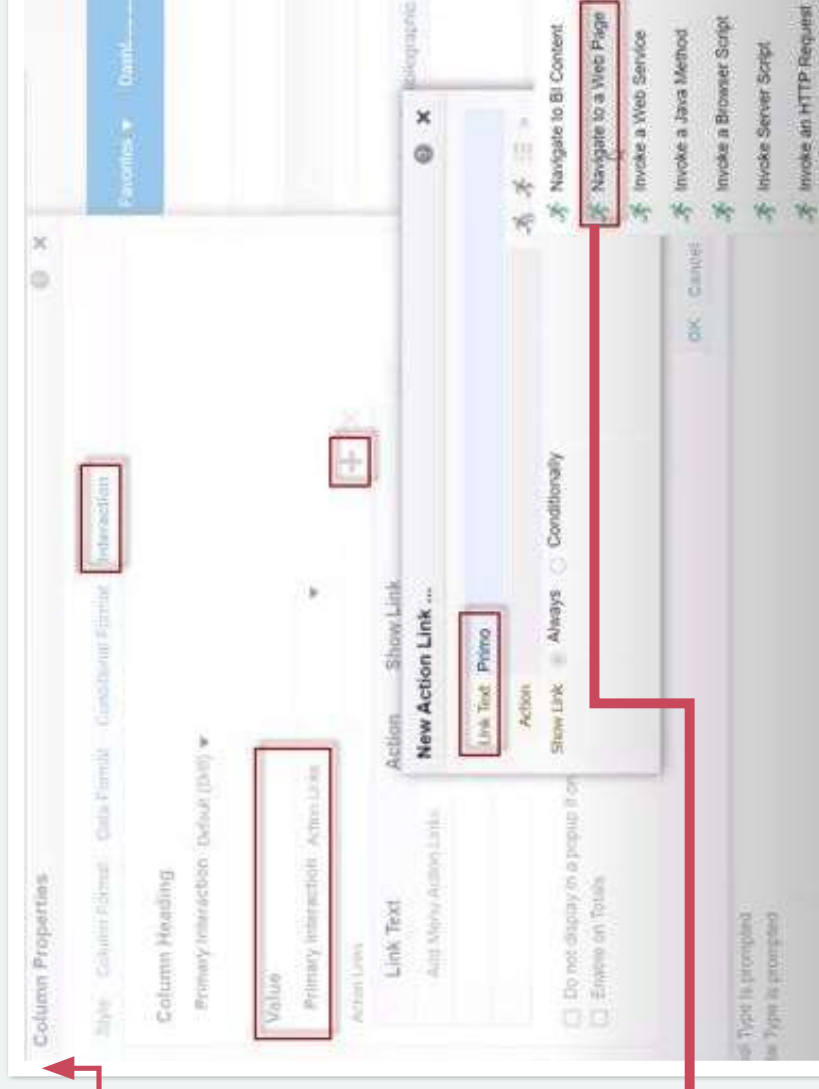
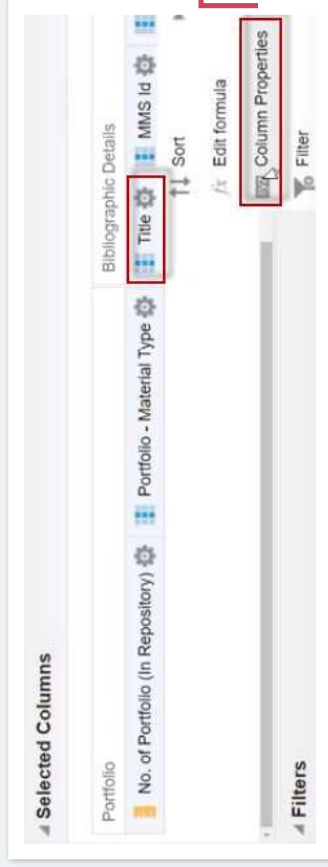
▼ **Column Heading:**

- any.contains.MMS Id

▼ **Column Formula:**

- 'any.contains,' | | "Bibliographic Details". "MMS Id"

# Column Properties



# Creating the link

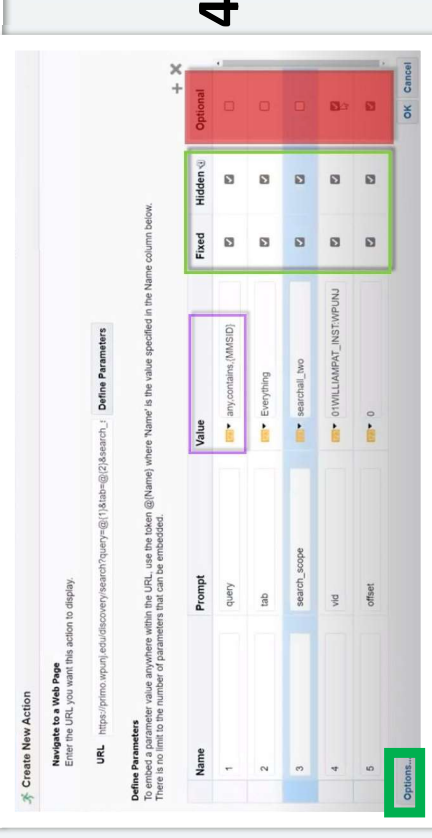
1



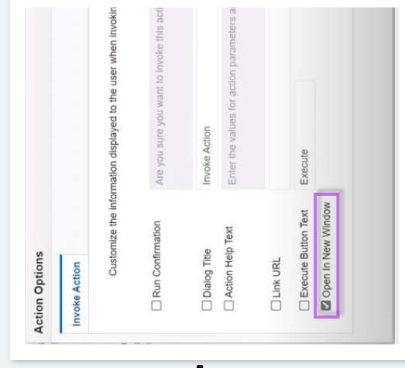
2



3



4



## ◆ Steps:

1. Search Primo (for any MMS ID) and grab the search results URL
2. Replace the part of the URL that contains the MMS ID that you searched for with: {MMSID}
3. In "Define Parameters," check/uncheck boxes and choose the 'any,contains' option for the "Value"
4. In "Options," checkbox to have Primo link open in a new window

# Now all titles are linked to Primo!

Compound Layout

Pivot Table

Rows 1 - 500

| Bibliographic Details - Resource Type     | Bibliographic Details - Material Type | Portfolio - Material Type | Is Free | Portfolio Access Type | PDA Name | License Status | License Name | Electronic Collection Public Name  | Bibliographic Level | MMS Id          | Title  |
|---|---------------------------------------|---------------------------|---------|-----------------------|----------|----------------|--------------|--|---------------------|-----------------|--|
| Journal (Ceased publication) - Electronic | Journal                               | Book                      | No      | None                  | None     |                |              | EBSCOhost American Antiquarian Society Historical Periodicals Collection: Series 1 | s                   | 997377460005211 | The Euterpeiad or, musical intelligencer: devoted to the diffusion of musical information and belles lettres |
|   |                                       |                           |         |                       |          |                |              |  |                     | 997377464105211 | Musical journal for the piano forte  |
|   |                                       |                           |         |                       |          |                |              |  |                     | 997377469805211 | The review   |
|   |                                       |                           |         |                       |          |                |              | EBSCOhost American Antiquarian Society Historical                                  | s                   | 997372715605211 | The collegian  |
|   |                                       |                           |         |                       |          |                |              |  |                     | 997374912205211 | The American museum of science, literature and the arts.   |





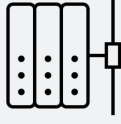
Where we are using them

# Current Reports Using Drill Downs



## Current Inventory Counts (annual)

- Everything the library owns, including physical + electronic items



## Catalog additions/deletions reports (monthly)

- All changes made in our catalog



## NEW Collection Development reports (monthly)

- Reports for liaison librarians (selectors)

## Ex Libris Documentation

[Linking from Analytics Reports](#)

[ADVANCED ANALYTICS Technical Seminar 2018 \(covers 'action links' aka 'drill down'\)](#)

[How do I create a Pivot Table in Alma Analytics?](#)

[Analytics, Documentation \(Ex Libris Knowledge Center\)](#)

[Analytics, Best Practices and How-Tos \(Ex Libris Knowledge Center\)](#)

[Presentations and Documents – Analytics \(Ex Libris Knowledge Center\)](#)

## Additional Documentation



Oracle Business  
Intelligence  
Documentation

[Oracle Business  
Intelligence Cloud  
Service](#)



Harvard Wiki

[Analytics &  
Reporting, Harvard  
Wiki](#)



Thank you!

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