# Status report regarding centralized analytics

Forwarded to Implementation Team for discussion on March 24, 2017

The ULMS Analytics and Reporting Working Group would like to clarify how system-wide Analytics will be managed in Alma.  We have several questions, both from our group and forwarded to us by others.

* **Regarding the ULMS Analytics and Reporting Working Group:**
  + We foresee the need to provide training in the months after Go Live and would like to begin surveying needs and planning training
  + We would like to have some information and/or assurance from the Implementation Team regarding the future of this group so that we can plan with confidence
* **Regarding SDLC-licensed resources**
  + Is SDLC going to provide **COUNTER usage stats** in Alma for **ECC and opt-in** resources?
    - Will **Chancellor's Office staff** handle this usage reporting?
  + Will  SDLC develop and provide **shared analytics reports / dashboards for ECC and opt-in** resources?
    - e.g. Cost-per-use, usage by institution, etc.
  + What provision will be made to help campuses **coordinate their local usage statistics gathering with that of the Chancellor's Office**?
    - Campuses often license a mixture of independently negotiated, SCELC, and SDLC ECC/opt-in resources from the same publishers/vendors
    - Vendors do not necessarily distinguish between these licenses when reporting usage
    - There is a **high likelihood of duplication** between the usage harvested or uploaded by the individual campuses and the usage harvested or uploaded by the CO
    - Creating de-duplicated usage reports for these mixed-license resources will require time, effort, and expertise
    - Usage statistics loaded by individual campuses are available for reporting from within the NZ Analytics, so **reports that aggregate CO-loaded statistics and campus-loaded statistics may be best run from the NZ**; it is unknown/untested at this time whether CO-loaded statistics could be incorporated into reports run at the IZ level
  + What is the expected role of the **EAR Analytics Subcommittee** in the process?
  + What is the expected role of the **ULMS Analytics Working Group**, or any post-implementation version of this group?
  + Will someone or some group be designated to take the lead or coordinate efforts to **generally develop analytics reports for the use of all institutions**?
    - Will someone be responsible for overseeing the Shared Calstate Community folder?
* **Regarding System-wide reporting in general:**
  + It appears that **all Analytics fields and data reportable at the IZ level are also available at the NZ level**.  There are advantages to this but also potential problems.
    - Reports can be run at the NZ level that **combine the data from multiple campuses or allow comparison of local inventory to the NZ**
      * Example reports include:
        + Total physical items or expenditures system-wide, by institution, by material type, etc.
        + Resource sharing or fulfillment statistics system-wide or by institution
        + Duplication between an institution's e-inventory and available e-inventory in the NZ
    - This has important implications:
      * If the data can be kept consistent across campuses, **data for surveys such as IPEDS may be generated by reports at the NZ level, rather than by each campus**
        + **Who would be responsible for these reports?**
      * User and expenditure data are included and viewable by anyone with the ability to run the Analytics reports; **there may be privacy issues** that should be explored
        + Note that it is possible to configure Alma to anonymize user data for Analytics in the NZ
  + **We propose that each campus be given the ability to run Analytics reports in the NZ at Go Live or sooner, provided user details are anonymized.**