

From Spreadsheets to Self -Service

Creating Financial Dashboards for Library Stakeholders

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Presentation Outline

- Project background & goal
- Timeline
- Dashboard showcase
- Lessons learned
- Recommendations

Introduction to the Project





Overview of the Project

Project Goals

Full electronic resource management for journals & databases
Transparent, self-service access to financial and usage information

Project Duration

Four years (and counting)



Questions to answer

Liaison Librarian Questions

- What does my faculty subscribe to and how much does it cost?
- How do subscription prices compare to one another?
- What is the cost-per-use for specific databases, specialist resources or journal titles?

Senior leadership questions

- Current spending this financial year, and years prior
- Year on year price rises for each subscription
- A monthly spend breakdown, detailing what was spent each month in the prior year and on which product
- Finance and usage data required to complete the Society of College, National and University Libraries (SCONUL) yearly statistical return



Challenges to Answering those Questions

- Bottlenecks
- Lack of transparency
- 'Bouncing between administrative portals' to get usage stats
- Spreadsheet overwhelm
- Spreadsheet accidents



Alma & Primo Business Case March 2021

Business case to upgrade to Ex Libris' Primo & Alma Library Management System was successful (March 2021)

A significant portion of the business case focused on the potential that this LMS had to improve financial transparency and share usage statistics about student engagement with the library's e-resource collections.

Project Planning & Implementation





Stage 1 Migration

- November 2021
- Subscriptions & finances could not migrate - yet some 20 year old purchasing data did
- The Unexpected (retirement, illness, cyberattack, massive stock moves)
- Scale of the ERM project becomes daunting



Stage 2 Workflow Implementation

- May-December 2023
- New staff, training needed
- Frustration & mistakes
- January-March 2024:
Subscriptions data input
aka Continuous POL
configuration



Stage 2 Staff Time Breakdown

May 2023-March 2024

.5 FTE

- Ledger & funds created
- Vendors added and configured for SUSHI
- 162 continuous POLs created
- While doing the day job



Stage 3 Dashboard Implementation

March 2024

Financial data dashboard
created in Alma Analytics

January 2025

Reliable usage dashboards

Dashboard Showcase





Financial Dashboard:

Overall spend by faculty

Fund Name	Fund Code	Total Allocation	Encumbered Amount	Expended Amount	Available Balance	Cash Balance	Percent of Year Completed	Percent Spent YTD	Fund Status	Fund Code
jdb Social Sciences	Jdb4035	£22,163.49	£1.00	£22,162.48	£0.01	£1.01	80.55%	100.00%	ACTIVE	Jdb4035
Memberships	Memberships	£7,604.13	£1,780.56	£5,823.56	£0.01	£1,780.57	80.55%	76.58%	ACTIVE	Memberships
jdb Art & Design	jdb4010	£6,879.82	£0.00	£6,835.59	£44.23	£44.23	80.55%	99.36%	ACTIVE	jdb4010
jdb Performing Arts	jdb4011	£4,342.81	£0.00	£4,342.81	£0.00	£0.00	80.55%	100.00%	ACTIVE	jdb4011
jdb Media & Humanities	jdb4019	£41,989.72	£0.00	£27,551.04	£14,438.68	£14,438.68	80.55%	65.61%	ACTIVE	jdb4019
jdb Tourism	jdb4038	£6,477.45	£0.00	£6,477.44	£0.01	£0.01	80.55%	100.00%	ACTIVE	jdb4038
jdb Education	jdb4051	£33,557.80	£439.17	£33,118.61	£0.02	£439.19	80.55%	98.69%	ACTIVE	jdb4051
jdb Business	jdb4062	£103,745.74	£0.00	£103,745.73	£0.01	£0.01	80.55%	100.00%	ACTIVE	jdb4062
jdb Law	jdb4063	£107,567.75	£0.00	£62,651.46	£44,916.29	£44,916.29	80.55%	58.24%	ACTIVE	jdb4063
jdb Psychology	jdb4068	£19,606.65	£0.00	£19,606.64	£0.01	£0.01	80.55%	100.00%	ACTIVE	jdb4068
jdb Engineering	jdb4081	£35,810.61	£0.00	£35,810.60	£0.01	£0.01	80.55%	100.00%	ACTIVE	jdb4081
jdb Computing	jdb4082	£50,930.67	£0.00	£36,986.95	£13,943.72	£13,943.72	80.55%	72.62%	ACTIVE	jdb4082
jdb Pharmacy	jdb4094	£64,321.46	£15,407.40	£48,371.72	£542.34	£15,949.74	80.55%	75.20%	ACTIVE	jdb4094
jdb Healthcare Science, Nursing, Sport	jdb4095	£57,535.96	£21,920.26	£35,615.69	£0.01	£21,920.27	80.55%	61.90%	ACTIVE	jdb4095
jdb Medicine	jdb4097	£39,938.62	£10,287.18	£29,650.55	£0.89	£10,288.07	80.55%	74.24%	ACTIVE	jdb4097
General	jdbGeneral	£342,868.98	£0.00	£342,868.98	£0.00	£0.00	80.55%	100.00%	ACTIVE	jdbGeneral
Grand Total		£945,341.66	£49,835.57	£821,619.85	£73,886.24	£123,721.81		86.91%		



Financial Dashboard:

What does my faculty purchase, how much does it cost, when does the subscription end, who do we buy it from?

PO Code	Fund Name	PO Line Reference	MMS Id	Item Description	Vendor Name	Vendor Access Provider	PO Line Type Name	PO Line Total Price	Outstanding Balance	Amount Paid	Subscription To Date
4035	Job Social Sciences	POL-6044	991001892854107451	SocINDEX with Full Text	Ebsco Subscription Services	Ebsco Subscription Services	Electronic Collection - Subscription	8,565	0	8,565	10/31/2025
		POL-6266	991001906464907451	The British journal of social work., British Association of Social Workers., Began with: Vol. 1, no. 1 (1971), 1468-263X, ISSN	Ebsco Subscription Services	Oxford University Press	Electronic Journal - Subscription	976	0	976	12/31/2025
		POL-6269	991001900744607451	Criminology & criminal justice : CCJ., Sage Publications, Began with: Vol. 6, no. 1 (Feb. 2006), 1748-8966, ISSN	Ebsco Subscription Services	SAGE Publications, Ltd.	Electronic Journal - Subscription	792	0	792	12/31/2025
		POL-6271	991001898899807451	Disability & society., Carfax International Publishers, Began with vol. 9, no. 1 (1994), 1360-0508, ISSN	Ebsco Subscription Services	Taylor & Francis	Electronic Journal - Subscription	2,794	0	2,794	12/31/2025
		POL-6324	991001900728907451	Theoretical criminology., Sage Publications, Began with: Vol. 1, no. 1 (Feb. 1997), 1461-7439, ISSN	Ebsco Subscription Services	SAGE Publications, Ltd.	Electronic Journal - Subscription	977	0	977	12/31/2025
		POL-6326	991001904461707451	Youth justice : the journal of the National Association for Youth Justice., Russell House., Vol. 1, no. 1 (Apr. 1, 2006), 1747-6283, ISSN	Ebsco Subscription Services	SAGE Publications, Ltd.	Electronic Journal - Subscription	666	0	666	12/31/2025
		POL-6380	991001904464707451	Cultural sociology., Sage Publications., Vol. 1, no. 1 (Mar. 2007), 1749-9763, ISSN	Ebsco Subscription Services	SAGE Publications, Ltd.	Electronic Journal - Subscription	455	0	455	12/31/2025
		POL-6381	991001896530207451	Sociology : the journal of the British Sociological Association., Oxford University Press., Began with vol. 1, no. 1 (Jan. 1967), 1469-8684, ISSN	Ebsco Subscription Services	SAGE Publications, Ltd.	Electronic Journal - Subscription	455	0	455	12/31/2025
		POL-6669	991001926550007451	Community Care Inform Children	Mark Allen MA Healthcare		Electronic Collection - Subscription	5,876	0	5,876	2/28/2028
		POL-7757	991002171049907451	Policing : a journal of policy and practice., Oxford University Press., Vol. 1, no. 1	Ebsco Subscription	Oxford University Press	Electronic Journal -	606	1	605	12/31/2025



Financial Dashboard:

How much do we spend (on what) in which month?

Fund Expenditure

JDB Fund Summary Monthly JDB Expenditure - Current Fiscal Year Monthly JDB Expenditure - Previous Fiscal Year

including negative balances (refunds/credits)

		2023	2023	2023	2023	2023	2024	2024	2024	2024	2024	2024	2024
		8	9	10	11	12	1	2	3	4	5	6	7
Transaction Amount	£0.00	£28,443.35	£86,614.86	£24,042.60	£66,474.64	£316,389.42	£23,372.00	£174,804.29	£70,544.25	£84,778.60	£46,644.77	£30,573.48	£46.13



Financial Dashboard:

How much has the price changed for each subscription compared to last year?

Transaction Expenditure Amount by PO Line Title, Status, PO Line Reference, YOY-Difference, YOY-Difference Percentage, Fiscal Period Description, Fiscal Period Filter

PO Line Title	Status	PO Line Reference	YOY-Difference	YOY-Difference Percentage	01/08/2023 - 31/07/2024	01/08/2024 - 31/07/2025
					Previous Fiscal Year	Current Fiscal Year
					Transaction Expenditure Amount ▲	Transaction Expenditure Amount
Family practice.	ACTIVE	POL-6281	21.36	-4.02%	531.89	553.2
Medical case studies.	ACTIVE	POL-6234	26.44	-4.87%	543.08	569.5
Visual Artists Network	ACTIVE	POL-5485	0.00	0.00%	548.40	548.4
Research in dance education.	ACTIVE	POL-6318	55.94	10.00%	559.35	615.2
British journal of healthcare assistants.	ACTIVE	POL-6690	26.45	-4.65%	571.55	598.0
British journalism review.	ACTIVE	POL-6231	28.48	-4.92%	578.67	607.1
The Journal of business strategy.	CLOSED	POL-6316	-596.98	-100.00%	596.98	0.0
International journal of COMADEM	CLOSED	POL-6641	-610.20	-100.00%	610.20	0.0
Journal of paramedic practice : the clinical monthly for emergency care professionals.	ACTIVE	POL-6638	126.91	20.69%	613.47	740.3
Comprehensive child and adolescent nursing.	ACTIVE	POL-6267	94.59	15.20%	622.40	716.9
Youth justice : the journal of the National Association for Youth Justice.	ACTIVE	POL-6326	32.55	5.14%	633.59	666.1
Journal of applied sport psychology [electronic resource].	ACTIVE	POL-6293	-68.14	-10.47%	650.88	582.7
International journal of event and festival management.	ACTIVE	POL-6288	26.44	3.99%	662.07	688.5



Usage Dashboards

Much more complicated

Out of the box solutions from Clarivate do not work out of the box

Alma DV

Live & historic usage statistics
Live pricing
Filter by date, faculty, school, collection, sub-collection



Library & Learner Development
Journals, Databases & Memberships

2023 to 2024:
Database spend and use

PO Line Reference

All

Fund Name

All

Databases are organised into 3 data source categories:

One to one relationship databases

Cost and usage data sourced via external automated Sushi API connection. Each Sushi Platform matches one database.

One to many relationship databases (EBSCOhost & ProQuest)

Cost and usage data sourced via external automated Sushi API connection. Each Sushi platform matches multiple databases.

Non-Sushi API connected databases

Databases where usage either does not conform to COUNTER5 usage or where

Expenditure 2023/24
£833,504.73

Unique item requests
571,629.5

Average UIR cost per use
£1.42

Average cost per use calculated using database expenditure where UIR is known.

One to One Databases	Expenditure 2023/24	Unique item requests	UIR Cost per use	Total item requests	TIR Cost per use
ACM Digital Library	£4,120.79	2,468	£1.67	2,740	£1.50
American Chemical Society Journals	£15,407.40	2,814	£5.48	4,091	£3.77
Cambridge Core, Cambridge University Press	£349.74	3,149	£0.11	4,535	£0.08
IEEE Electronic Library (IEL)	£44,960.69	6,117	£7.35	9,390	£4.79
JSTOR	£3,709.00	5,571	£0.67	6,931	£0.54
KB+ Jisc Collections Wiley Online Library Read and Publish Open Access Agreement 2020-2023 Publishing List	£4,797.48	59,061	£0.08	76,095	£0.06
ScienceDirect	£281,959.23	202,467	£1.39	283,404	£0.99

EBSCOhost & ProQuest Databases	Expenditure 2023/24	Unique item requests	UIR Cost per use
APA PsycArticles® [database]	£15,239.00	10,123.50	£1.51
Art Full Text	£5,625.00	662.67	£8.49
British Education Index	£2,506.80		
Business Source Complete	£26,235.86	10,885.04	£2.40
CINAHL Ultimate	£12,653.99	60,597.89	£0.21
Education Research Complete	£7,288.98	19,877.66	£0.37
Entrepreneurial Studies Source	£2,000.82	241.00	£8.17
Global Newsstream	£15,035.69	1,575.50	£9.54
Harvard Business School Select Case Study Selection	£1,902.95		
Harvard Core Curriculum	£2,284.79		£175.75
Health Research Premium Collection	£20,896.33	38,124.00	£0.55
Hospitality & Tourism Complete	£3,418.00	490.17	£6.95
International Bibliography of Theatre & Dance with Full Text, EBSCOhost	£3,414.99	226.50	£14.63
Literary Reference Center Plus	£11,192.89	1,090.50	£9.08

Non-Sushi Databases (manual csv upload)	Expenditure 2023/24	Unique item requests	UIR Cost per use
AN Artists Network	£548.40	430	£1.28
APA PsycArticles® [database]	£15,239.00	10,190	£1.50
Box of Broadcasts (BoB), British Universities Film and Video Council	£10,045.20	3,798	£2.64
British Pharmacopoeia, TSO	£2,270.00		
British Standards Online	£28,425.60	244	£116.50
Cochrane Library	£1,868.82	7	£266.97
Community Care Inform Children	£5,584.00	177	£31.55
Complete Anatomy	£24,464.56	24,247	£1.01
Embase, Ovid	£12,401.00	4,849	£2.56
Emerald Insight	£55,279.00	22,647	£1.56
Euromonitor International Market Research Monitor	£24,042.60	3,406	£7.06
Global Newsstream	£15,035.69	1,526	£9.86
Health Research Premium Collection	£20,896.34	38,122	£0.55
HeinOnline Law Journal Library	£5,906.29	7,322	£0.81



Library & Learner Development
Journals, Databases & Memberships

Serials:
Usage tracking

Fund Name

All

Title

All

Number of serial journals

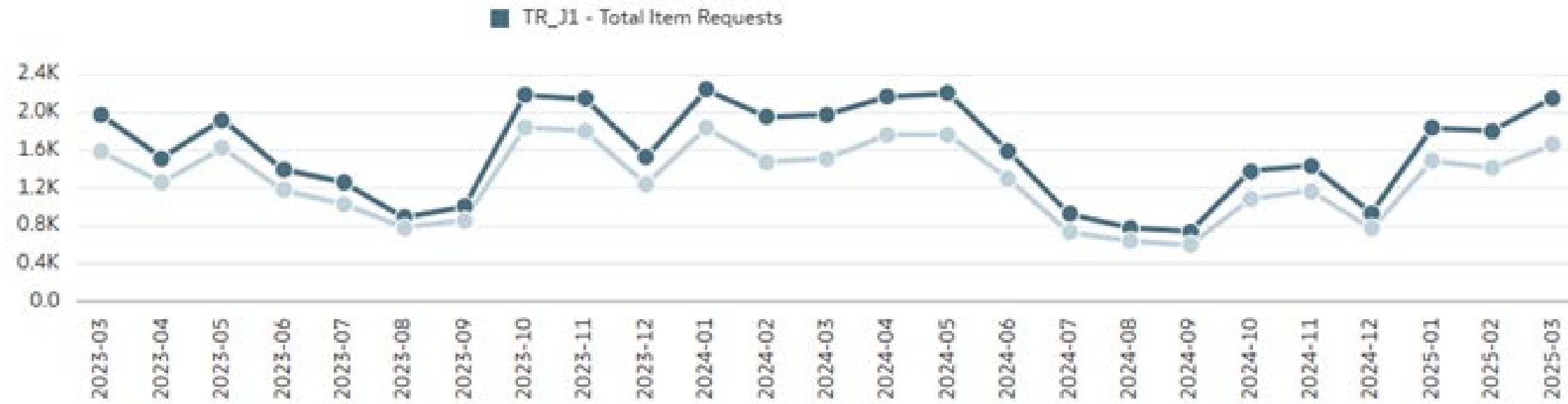
77

Unique item requests

47,649

Total item requests

63,778



PO Line Reference	Journal	Unique item requests	Total item requests	Usage Year-Month Filter
POL-6419	BMJ : British medical journal.	6,711	8,730	2023-03
POL-6266	The British journal of social work.	4,368	5,204	2023-04
POL-6638	Journal of paramedic practice : the clinical monthly for emergency care professionals.	3,652	4,926	2023-05
POL-6273	Education 3-13.	2,902	3,948	2023-06
POL-6420	JAMA : the journal of the American Medical Association.	2,649	3,661	2023-07
POL-6290	International journal of inclusive education.	1,957	2,687	2023-08
POL-6317	Reflective practice.	1,707	2,472	2023-09
POL-6319	Research papers in education.	1,183	1,754	2023-10
POL-6280	European journal of special needs education.	1,148	1,489	2023-11
POL-6271	Disability & society.	1,107	1,473	2023-12
POL-6799	ELT journal.	938	1,205	2024-01
POL-6272	Early years : an international research journal.	932	1,326	2024-02
POL-6312	Prehospital emergency care.	799	1,125	2024-03

Results & Impact





Spending cuts 2024-2025

- 2 rounds of 10% cuts each time.
- Dashboards helped staff identify and quantify subscriptions quickly to meet savings targets

“I would be lost without these dashboards.”

LIBRARY DIRECTOR

“being able to view the costs, price increases and usage when I need to is important information and helps me make the case for including more journal articles on reading lists. Prior to having dashboards I would ask for that info, but it would be a manual task for the [collections and e -resources] team and obtaining that information did not always align timewise with when I needed it”

LIAISON LIBRARIAN

FAVOURITE ASPECTS

Self service aspect	All
Speed	All
Transparency	All
Financial insights	Director
Stopping the 'bounce'	Me

TOP USERS

Me
Library Director
Operations Officer / Analytics whiz

Lessons Learned & Recommendations





Lessons Learned

- This project took longer than was expected: 4 years
- Staffing efficiencies cannot be achieved until a lot of work has gone in
- Inputting data from scratch can be more time effective than migrating
- “Out of the box” promises don’t always deliver



Recommendations

- Hire, train, value, retain staff with metadata, systems and programming knowledge
- There is ongoing cost in maintaining dashboards and data the which underpins them
- Foster a brave space where mistakes are not penalised
- Support & maintain networks like EPUG-UKI



Questions?

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