Common Analytics Procedures

This section contains procedures that illustrate how to use Analytics. For a list of How To Analytics documents, see [Presentations and Documents - Analytics.]

Note

The screenshots on this page are not from the most up to date version of the Analytics user interface. While functionality reflects what is being used, the appearance of the interface may differ from what is now available.

Formatting Procedures

Logo in Analytics Report Title

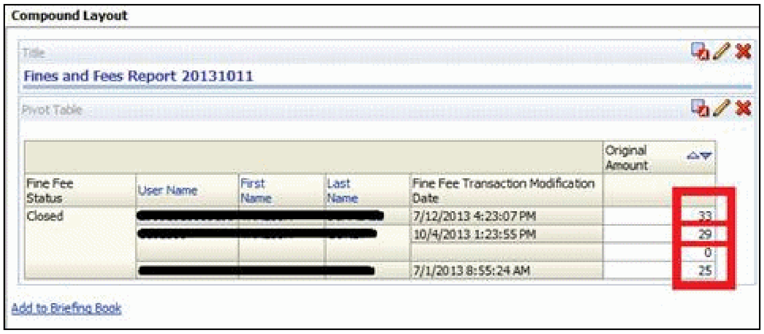
For information on adding a logo to the title of an Alma Analytics report, see How to add a logo to the top of an Alma Analytics report.

Number of Decimal Places

You can set the number of decimal places for numbers in an Analytics report.

To set the number of decimal places for sums:

1. From the Analytics dashboard, select **New > Analysis** and then select **Select Subject Area > Fines and Fees**.
2. Select the following columns from the Fines and Fees Transactions dimension:
   - Fine and Fee Status
   - Fine Fee Transaction Modification Date
   - Original Amount
3. From the User Details subject area select the following:
   - User Name
   - First Name
   - Last Name
4. Select the **Results** tab. In the following example, the sums are rounded up to whole numbers. For example, `29` is rounded up from `28.5`:

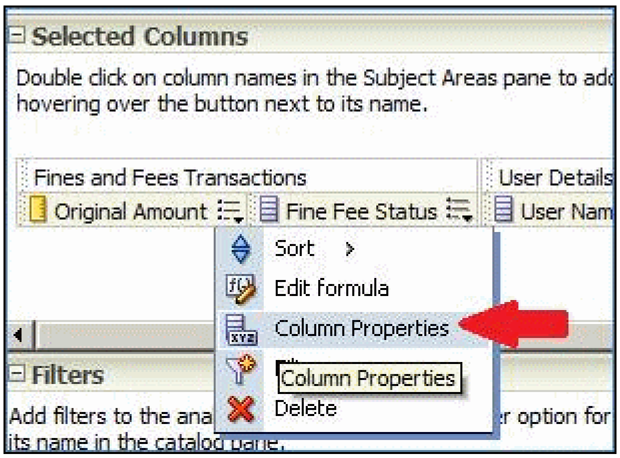


Sums Rounded Up

5. Select the **Criteria** tab to view the columns of the report.
6. From the column that contains the sum (in our example the Original amount column) select the More Options icon

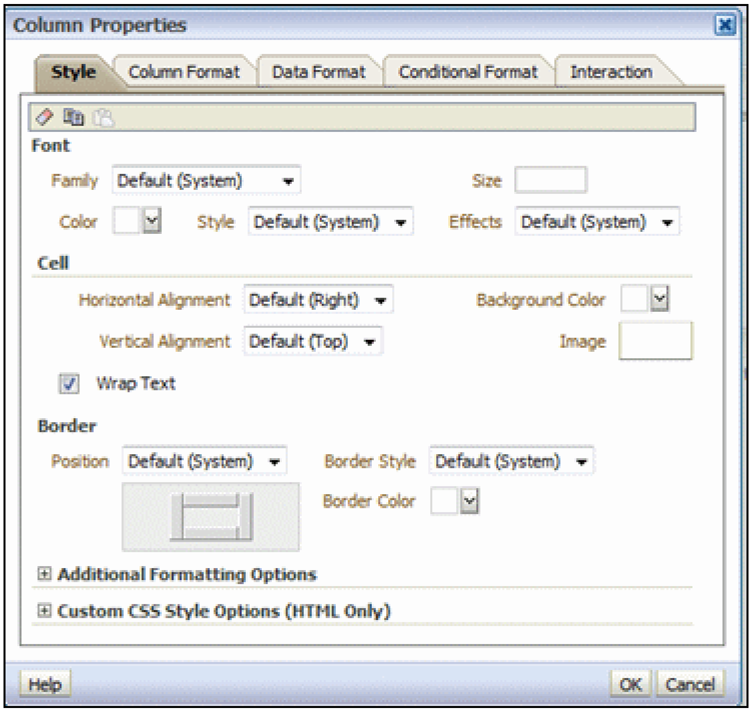
   

   and select **Column Properties** from the drop-down list.



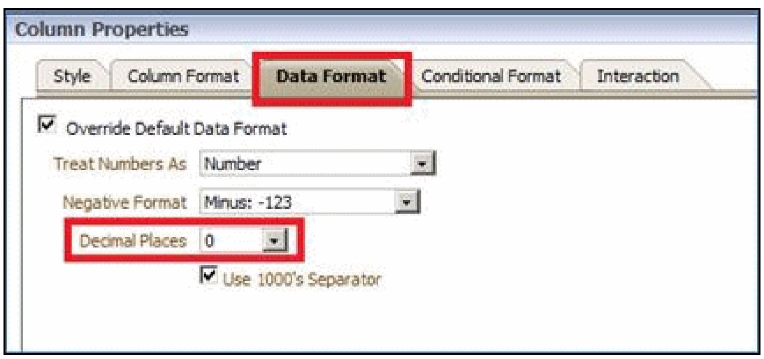
Column Properties Option

The Column Properties dialog box appears.



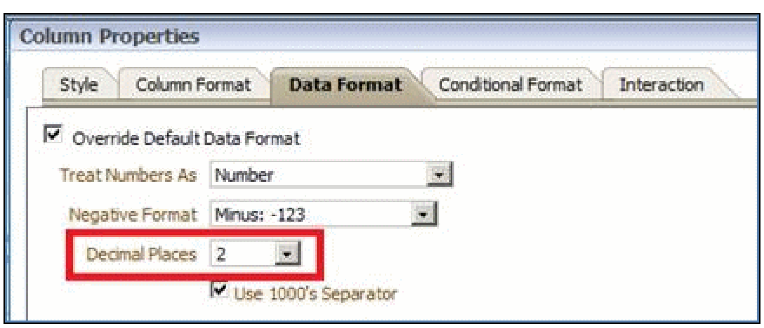
Column Properties Dialog Box

7. Select the **Data Format** tab.
8. Select the **Override Default Data** checkbox. Note that Decimal Places is set to `0`.



Data Format Tab

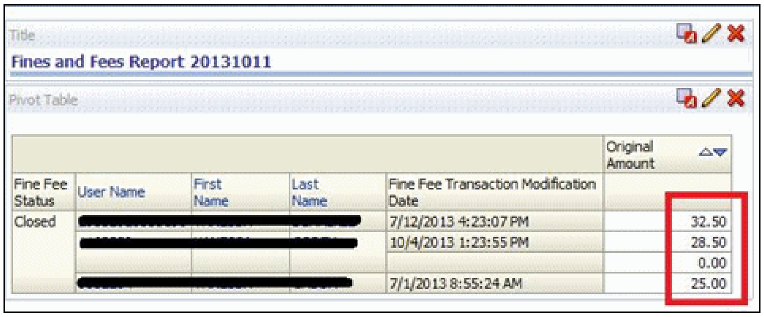
9. From the **Decimal Places** drop-down list, select `2`:



Decimal Places

10. Save the report and select the **Results** tab. The sums appear as two decimal places and the report displays `28.50`

instead of `29`:



Sums Not Rounded Up

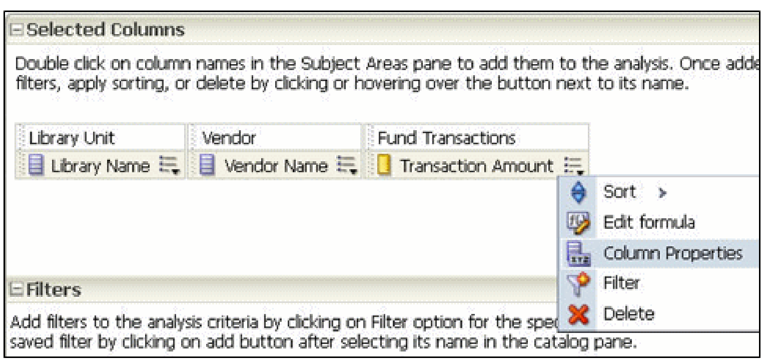
Currency Symbols

To add currency symbols to numbers:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Funds Expenditure**.
2. Create a report with the following columns:
   - Library Name
   - Vendor Name
   - Transaction Amount
3. Select the More Options icon

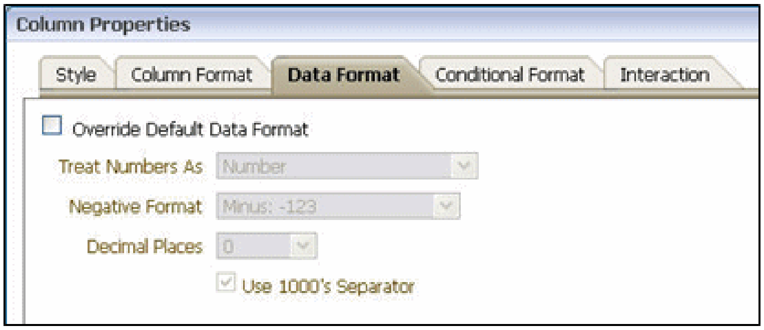
   

   for Transaction Amount and select **Column Properties** from the drop-down list.



Column Properties

The following is displayed:



Data Format

4. Select the **Data Format** tab.
5. Select the **Override Default Data Format** check box.
6. From the **Treat Number As** drop-down list, select **Currency**. The Currency Symbol drop-down list appears.
7. From the **Currency Symbol** drop-down list, select a currency symbol.
8. From the **Decimal Places** drop-down list, select the number of decimal places to which you want the results displayed.
9. Select the **Use 1000's Separator** check box to display the 1000's separator in the results.
10. Select **OK**.
11. Save the analysis.
12. Select the **Results** tab to display the report with a currency symbol displayed in the Transaction Amount column, for example:

Library Name	Vendor Name	Transaction Amount
Biology Library (BIO)	The Bookhouse, Inc.	£74.99
Graduate Library (GRAD)	Baker & Taylor	£75.35
	Book Sense	£97.78
	Coutts Information Services	£80.50
	EBSCO Electronic	£14.95
	Haworth Press, Inc.	£125.00
	HighWire Press	£19.44
	Mostly Monographs, Inc.	£49.99
	SwetsWise (Swets Information Services)	£43.22
	Templar Books	£29.88
	The Bookhouse, Inc.	£71.25
	Yankee Book Peddler	£5,192.61
Main Library	AAAS	£2,032.50
	ARTstor, Inc.	£52.00
	Antonio's Casa de Libri	£44.45
	B&TG	£28.00
	BAKER & TAYLORA	£174.92

Report

Additional Text

You can configure Analytics to automatically add text to the results of a report. In the following example, the characters ### are added to the results of a report.

To add text to the results of a report:

Title	Creation Date	Material Type	Call Number	Loan Status
"An anarchy in the mind and in the heart" : narrating Anglo-Ireland /	8/12/2013	Book	PR8803 .W65 2006	Complete
"Can we all get along?" : racial and ethnic minorities in American politics /	8/12/2013	Book	E184 .A1 M127 1995	Active
"Captains courageous"; a story of the Grand banks,	8/12/2013	Book	PR4854 .C3 1899	Active
"Chatter" : language and history in Kierkegaard /	8/12/2013	Book	B4378 .L35 F46 1993	Complete
"Harlem gallery" and other poems of Melvin B. Tolson /	8/12/2013	Book	PS3539.O334 A6 1999	Complete
"I know it's dangerous" : why Mexicans risk their lives to cross the border /	8/12/2013	Book	JV6483 .S538 2009	Active
"Mixed blood" Indians : racial construction in the early South /	8/12/2013	Book	E78.S65 P46 2003	Complete
"Modernism" in modern drama; a definition and an estimate,	8/12/2013	Book	PN1851 .K7 1962	Complete
"Out of the mouth of hell" : Civil War prisons and escapes /	8/12/2013	Book	E615 .C37 2005	Active
"Race," writing, and difference /	8/12/2013	Book	PN56.R18 R3 1986	Complete
"Surely you're joking, Mr. Feynman!" : adventures of a curious character /	8/12/2013	Book	QC16.F49 A37 1985	Complete
"This is the Zodiac speaking" : into the mind of a serial killer /	8/12/2013	Book	HV6533.C2 K45 2002	Complete
"To make America" : European emigration in the early modern period /	8/12/2013	Book	E29 .E87 T6 1991	Complete
"We're the Light Crust Doughboys from Burrus Mill" : an oral history /	8/12/2013	Book	ML421.L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.	8/12/2013	Book	PQ7297.A1 C63	Active
$40 million slaves : the rise, fall, and redemption of the Black athlete /	8/12/2013	Book	GV583 R46 2006	Active

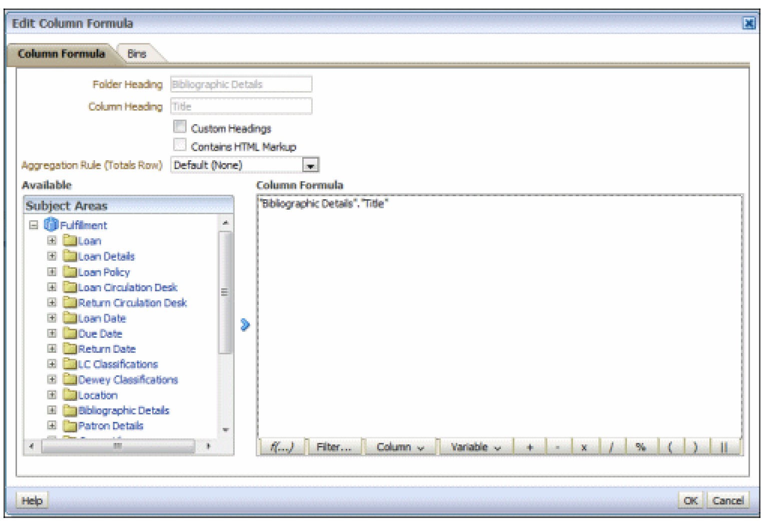
Example Report

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns, for example:
   - Bibliographic Details > Title
   - Physical Item Details > Creation Date
   - Physical Item Details > Material Type
   - Loan Details > Call Number
   - Loan Details > Loan Status

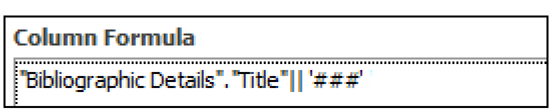
   The following is an example of a report:
3. From the field to which you want to add text, select the More Options icon

   and select **Edit Formula**. The Edit Column Formula page is displayed:

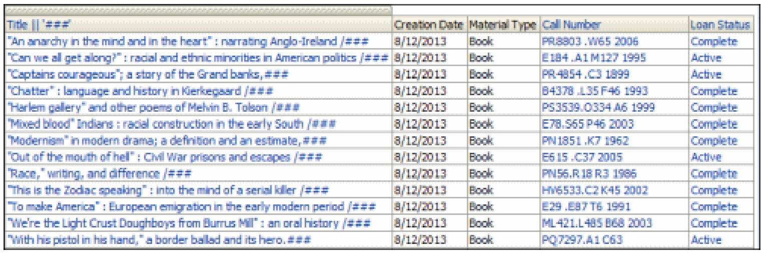
   

   Edit Column Formula
4. Insert the double pipe (||) symbol after the existing column formula by entering it manually or by selecting the double pipe symbol at the bottom of the page.
5. After the double pipe symbol, enter the text you want to add surrounded by single quotes, and select **OK**. In this example, we add `'###'`.

Column Formula with Text to Be Added

The text is added to the results and the column name.

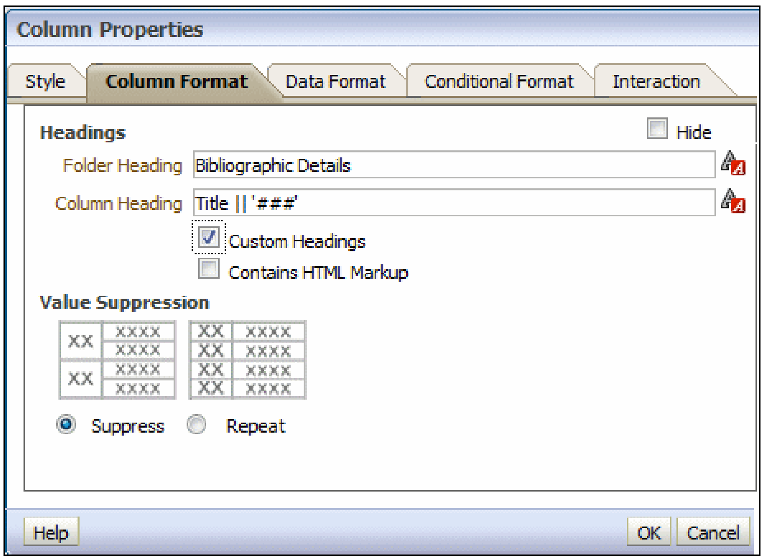


Title || '###'	Creation Date	Material Type	Call Number	Loan Status
"An anarchy in the mind and in the heart" : narrating Anglo-Ireland /###	8/12/2013	Book	PR8803 .W65 2006	Complete
"Can we all get along?" : racial and ethnic minorities in American politics /###	8/12/2013	Book	E184 .A1 M127 1995	Active
"Captains courageous"; a story of the Grand banks,###	8/12/2013	Book	PR4854 .C3 1899	Active
"Chatter" : language and history in Kierkegaard /###	8/12/2013	Book	B4378 .L35 F46 1993	Complete
"Harlem gallery" and other poems of Melvin B. Tolson /###	8/12/2013	Book	PS3539.O334 A6 1999	Complete
"Mixed blood" Indians : racial construction in the early South /###	8/12/2013	Book	E78.S65 P46 2003	Complete
"Modernism" in modern drama; a definition and an estimate,###	8/12/2013	Book	PN1851 .K7 1962	Complete
"Out of the mouth of hell" : Civil War prisons and escapes /###	8/12/2013	Book	E615 .C37 2005	Active
"Race," writing, and difference /###	8/12/2013	Book	PN56.R18 R3 1986	Complete
"This is the Zodiac speaking" : into the mind of a serial killer /###	8/12/2013	Book	HV6533.C2 K45 2002	Complete
"To make America" : European emigration in the early modern period /###	8/12/2013	Book	E29 .E87 T6 1991	Complete
"We're the Light Crust Doughboys from Burrus Mill" : an oral history /###	8/12/2013	Book	ML421.L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.###	8/12/2013	Book	PQ7297.A1 C63	Active

Report with Added Text

6. To remove the text from the column heading, select the More Options icon

and select **Column Properties > Column Format**. The Column Format tab appears:



Column Format

7. Select **Custom Headings** and change the column heading name.
8. Select **OK**. The column heading is changed.

Title	Creation Date	Material Type	Call Number	Loan Status
"An anarchy in the mind and in the heart" : narrating Anglo-Ireland /###	8/12/2013	Book	PR8803 .W65 2006	Complete
"Can we all get along?" : racial and ethnic minorities in American politics /###	8/12/2013	Book	E184 .A1 M127 1995	Active
"Captains courageous"; a story of the Grand banks,###	8/12/2013	Book	PR4854 .C3 1899	Active
"Chatter" : language and history in Kierkegaard /###	8/12/2013	Book	B4378 .L35 F46 1993	Complete
"Harlem gallery" and other poems of Melvin B. Tolson /###	8/12/2013	Book	PS3539.O334 A6 1999	Complete
"Mixed blood" Indians : racial construction in the early South /###	8/12/2013	Book	E78.S65 P46 2003	Complete
"Modernism" in modern drama; a definition and an estimate,###	8/12/2013	Book	PN1851 .K7 1962	Complete
"Out of the mouth of hell" : Civil War prisons and escapes /###	8/12/2013	Book	E615 .C37 2005	Active
"Race," writing, and difference /###	8/12/2013	Book	PN56.R18 R3 1986	Complete
"This is the Zodiac speaking" : into the mind of a serial killer /###	8/12/2013	Book	HV6533.C2 K45 2002	Complete
"To make America" : European emigration in the early modern period /###	8/12/2013	Book	E29 .E87 T6 1991	Complete
"We're the Light Crust Doughboys from Burrus Mill" : an oral history /###	8/12/2013	Book	ML421.L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.###	8/12/2013	Book	PQ7297.A1 C63	Active

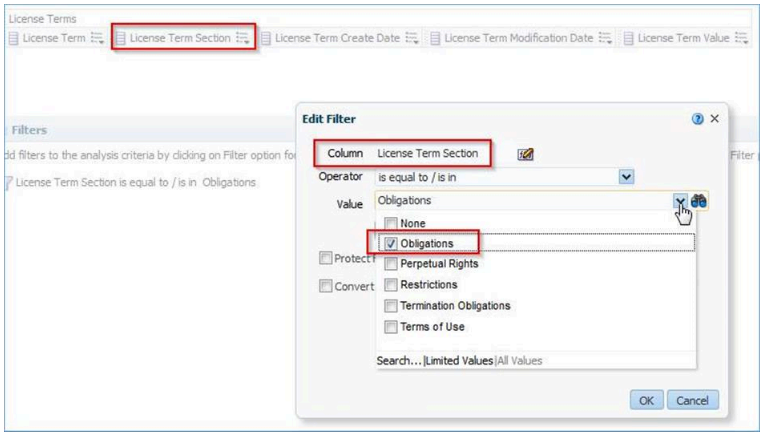
Report

License Obligation Notes

You can display the obligations note for licenses in reports from the **Licenses** subject area. This note indicates if you can cancel the license.

To display the obligations note for licenses in reports:

1. Create an analytics report using the **License Term Section** and **License Term Value** fields.
2. Filter **License Term Section** by **Obligation**. For example:



Filter License Term Section by Obligation

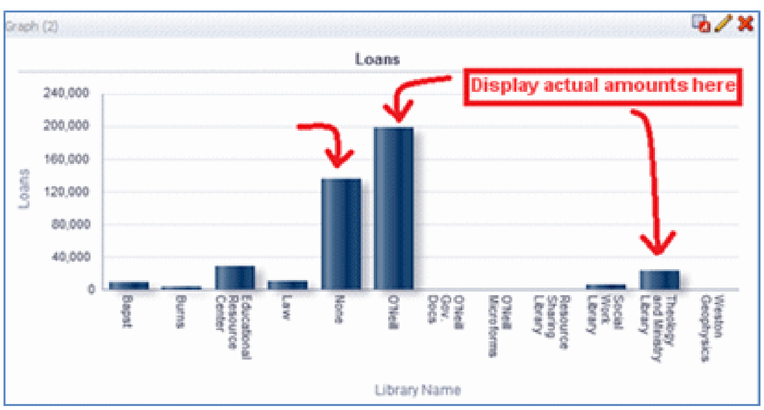
3. Run the report. The obligations note appears in the **License Term Value** field. For example:

License Name	License Term	License Term Section	License Term Create Date	License Term Modification Date	License Term Value
ACLS History E-Book Project NERL License	Licensee Notice Period For Termination	Obligations	9/24/2014	9/24/2014	90 days written notice. See 6. TERM AND TERMINATION: "6.1 This Agreement shall continue in effect for three (3) years from the first day of the calendar year that follows the Agreement Date, or from the official launch of the database, whichever occurs later, and will renew for successive one (1) year terms unless earlier terminated by either party by written notice not less than ninety (90) days prior to the end of the then current term."

Obligations Note

Values on the Top of Each Bar of a Bar Graph

This section describes how to display values on the top of each bar of an Analytics bar graph.



Values on Top of Each Bar

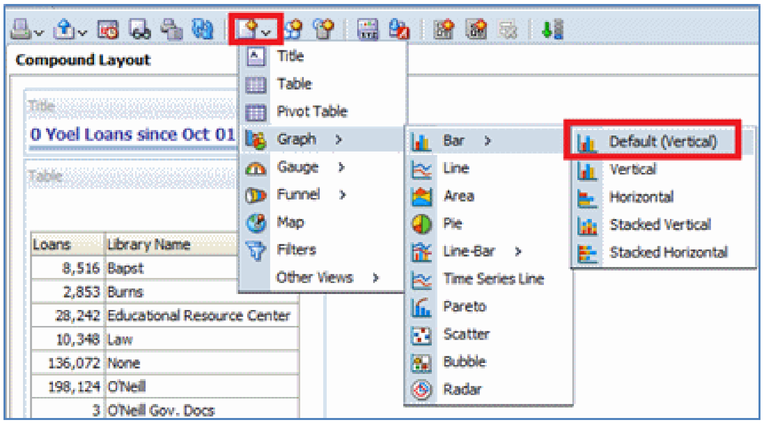
To display values on the top of each bar of an Analytics bar graph:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns, for example:

- Loan > Loans
- Location > Library Name

3. Select the My View icon

and then select **Graph > Bar > Default (Vertical)**.



Default Bar Graph

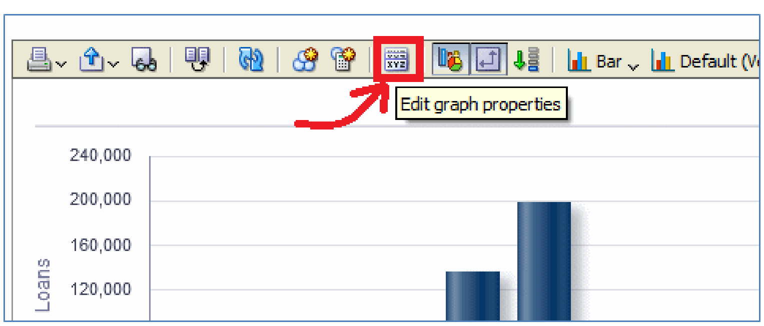
4. From the Results tab, select the Edit icon

to edit the graph:

Pencil Icon

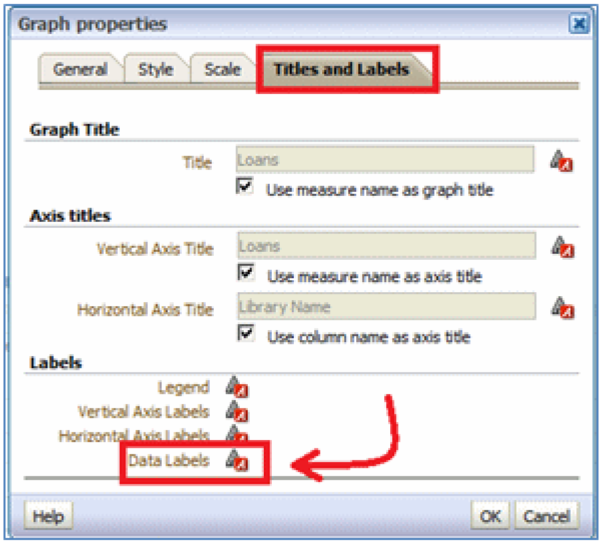
5. Select the Edit Graph Properties icon

:



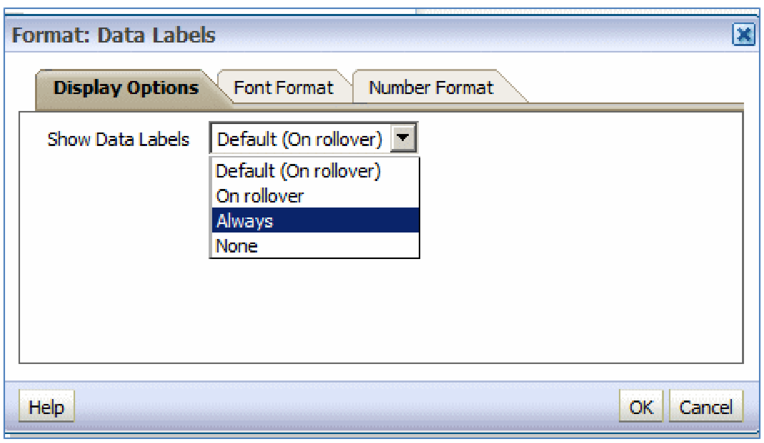
Edit Graph Properties

6. From the Titles and Labels tab, select **Data Labels**:



Titles and Labels

7. From the Display Options tab, select **Always**:



Display Options

Values are now displayed on the top of each bar of the bar graph:

Values on Top of Each Bar

Export Link (Dashboards)

You can add an **Export** link to reports that you put into dashboards. The dashboard is exported to Excel.

Note

You can add an **Export** link only to dashboards that you create, not out-of-the-box dashboards.

To add an Export link in dashboards:

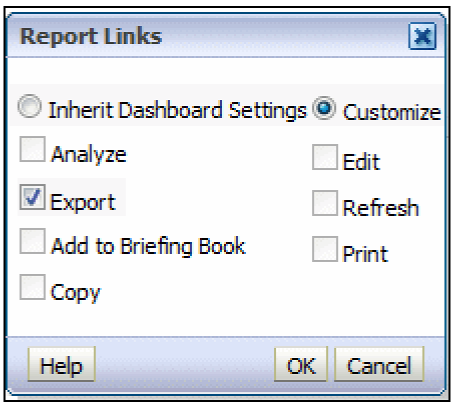
1. Select the Page options icon

   in the top-right of the page of the dashboard and select **Edit Dashboard**. The dashboard moves to edit mode.
2. Select the report to which you want to add the Export link.
3. Select the Properties icon

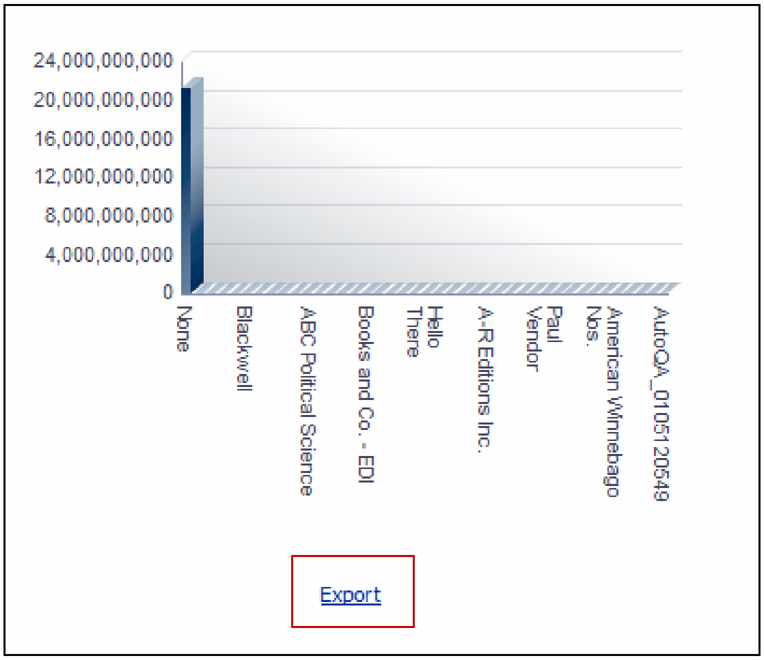
   in the report and select **Report Links**. The following appears:

   Report Links
4. Select **Customize** and **Export** and select **OK**.
5. Select the Save icon

   
6. Select **Run**.

   The **Export** link is added to the bottom of the report:



Export Link

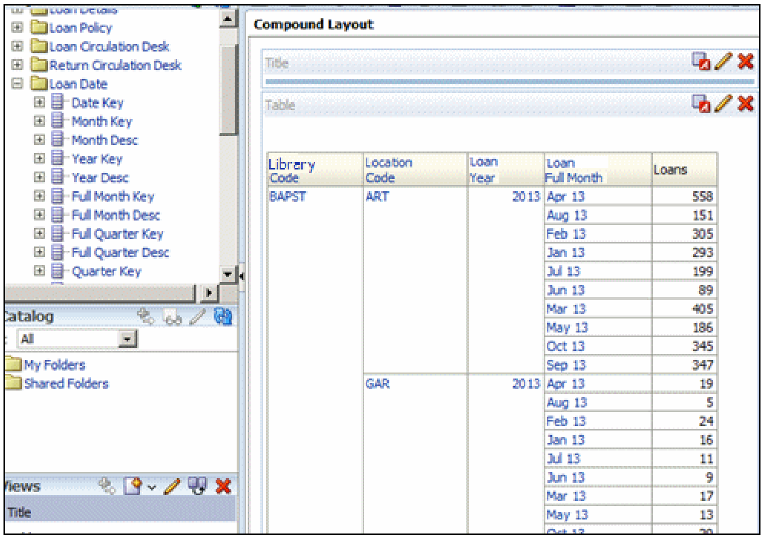
Functional Procedures

Subtotals

This section describes how to add a subtotal to your report and the impact of the order of the columns on your subtotals.

To create an analytics report with a subtotal:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns:
   - Location > Library Code
   - Location > Location Code
   - Loan Date > Loan Year
   - Loan Date > Loan Full Month
   - Loan > Loans (a measurement)
3. Select the **Results** tab to display the report. For example:

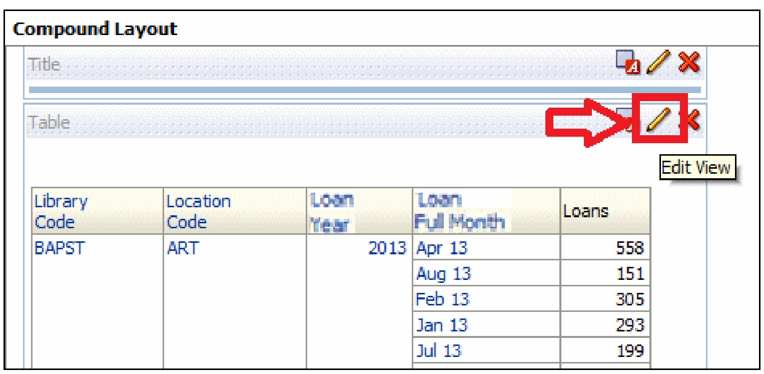


Loan Year and Loan Full Month Desc Columns

4. Calculate a subtotal of each library for the entire range. (This is relevant because the loans per month are displayed.)
   1. Select the Edit icon

      to display Edit view.

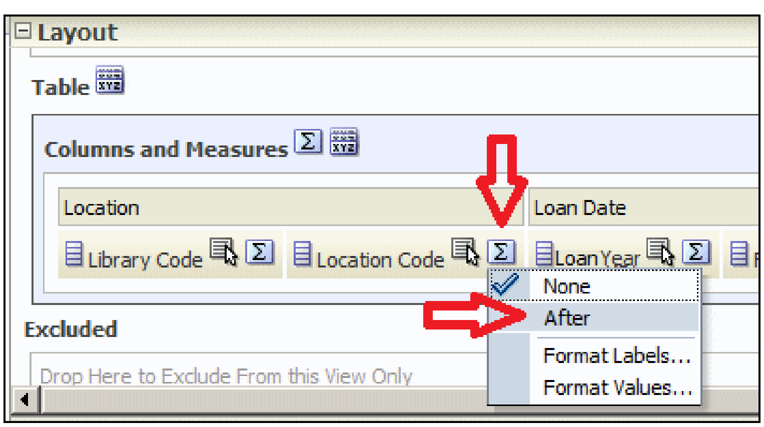
      

      Edit View

   2. For the column that you want to calculate a subtotal, select the Sigma icon

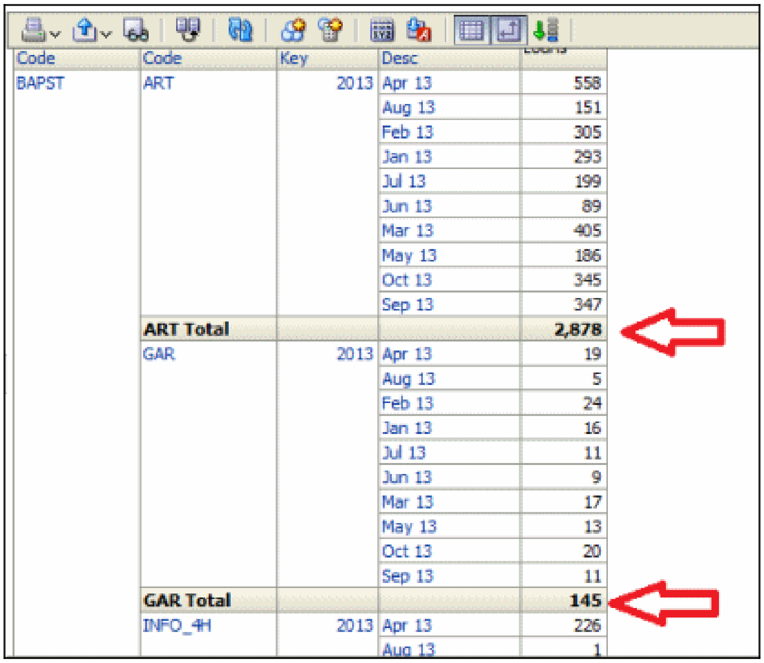
      

      and then select **After**. In the following example, this is performed in the Location > Location Code column:

After Option

The subtotals are now displayed:



Code	Code	Key	Desc	Loans
BAPST	ART	2013	Apr 13	558
			Aug 13	151
			Feb 13	305
			Jan 13	293
			Jul 13	199
			Jun 13	89
			Mar 13	405
			May 13	186
			Oct 13	345
			Sep 13	347
	ART Total			**2,878**
	GAR	2013	Apr 13	19
			Aug 13	5
			Feb 13	24
			Jan 13	16
			Jul 13	11
			Jun 13	9
			Mar 13	17
			May 13	13
			Oct 13	20
			Sep 13	11
	GAR Total			**145**
	INFO_4H	2013	Apr 13	226
			Aug 13	1

Subtotals

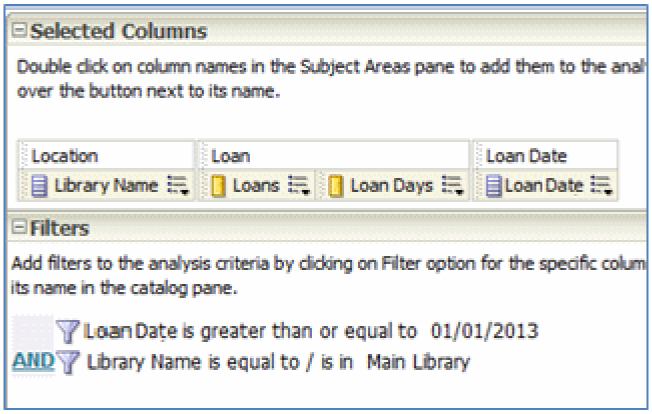
Mathematical Formulas

In the following example, one column displays the number of loans and a second column displays the number of loan days. A third column is created that displays the number of loan days divided by the number of loans. This may be useful for seeing high and low usage of items in order to decide where new items need to be purchased and where items can be withdrawn.

To create this analytics report:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns:
   - Library Name
   - Loans
   - Loan Days
   - Loan Date

   The criteria for the report appear as follows:



Selected Columns

3. Select the **Results** tab. The following is an example of the results:

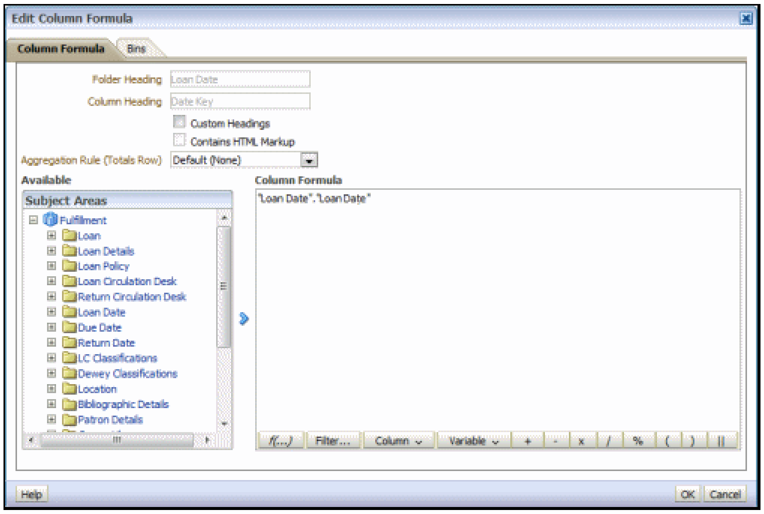
Library Name	Loans	Loan Days	Loan Date
Main Library	23	95	1/2/2013
	36	239	1/3/2013
	37	255	1/4/2013
	24	173	1/5/2013
	8	23	1/6/2013
	31	383	1/7/2013
	32	328	1/8/2013
	46	481	1/9/2013
	20	146	1/10/2013
	45	233	1/11/2013
	41	178	1/13/2013
	104	722	1/14/2013
	94	582	1/15/2013
	94	447	1/16/2013
	106	769	1/17/2013
	65	360	1/18/2013

Report

4. Select the **Criteria** tab and add a new column of any kind.
5. Select the More Options icon

   of the new column and select **Edit Formula**. The Column Formula dialog box is displayed:



Column Formula

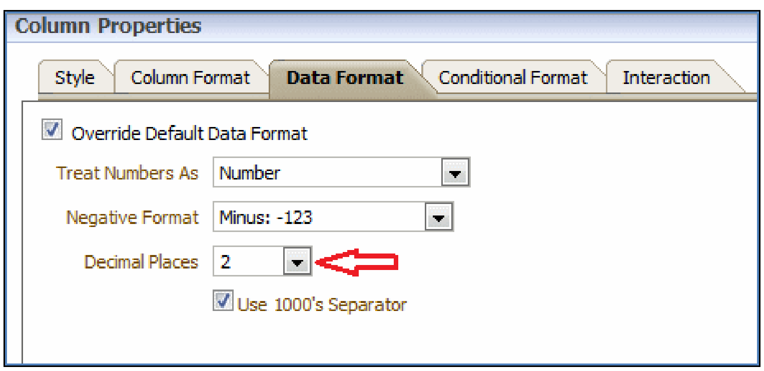
6. Delete the existing formula.
7. Enter `"Loan"."Loan Days"/"Loan"."Loans"`
8. Select the More Options icon

   of the new column and select **Column Properties > Column Format** and enter a new name for the column in the Column Heading field.
9. Select the More Options icon

   of the new column and select **Column Properties**. The column Properties dialog box appears:



Column Properties

10. From the Data Format tab, select a number of decimal places from the drop-down list.

    The following is an example of the results:

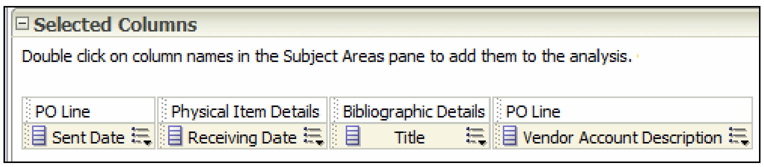
Library Name	Loans	Loan Days	Loan Date	Loan Days / Loans
Main Library	23	95	1/2/2013	4.13
	36	239	1/3/2013	6.64
	37	255	1/4/2013	6.89
	24	173	1/5/2013	7.21
	8	23	1/6/2013	2.88
	31	383	1/7/2013	12.35
	32	328	1/8/2013	10.25
	46	481	1/9/2013	10.46
	20	146	1/10/2013	7.30
	45	233	1/11/2013	5.18
	41	178	1/13/2013	4.34
	104	722	1/14/2013	6.94
	94	582	1/15/2013	6.19
	94	447	1/16/2013	4.76
	106	769	1/17/2013	7.25
	65	360	1/18/2013	5.54
	17	65	1/19/2013	3.82

The new column

Analytics Report

In the following example, the number of days between the date an order is sent to a vendor and the date the item is received. This may be useful for seeing which vendors are the fastest to respond and which vendors are the slowest to respond.

To create this report:



Selected Columns

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns:
   - PO Line > Send Date
   - Physical Item Details > Receiving Date
   - Bibliographic Details > Title
   - PO Line > Vendor Account Description

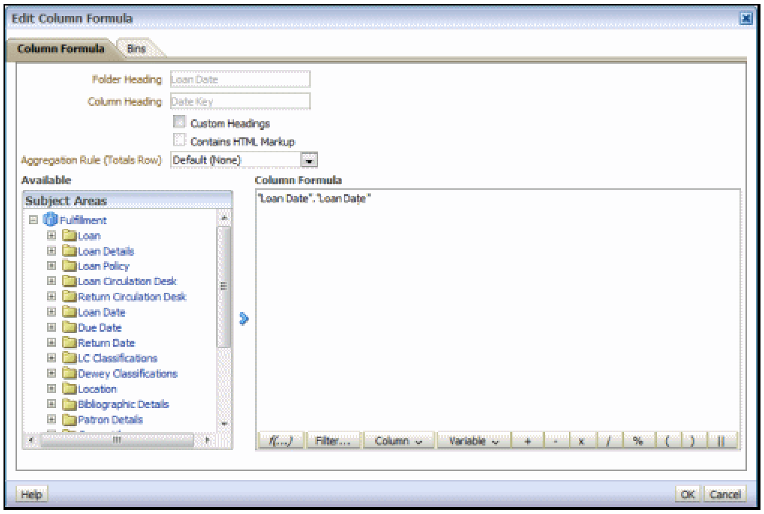
   The criteria for the report appear as follows:
3. Select the **Results** tab. The following is an example of the results:

Sent Date	Receiving Date	Vendor Account Description	Title
1/4/2012	7/22/2013 8:47:13 AM	AutQA Vendor Account description	Ireland
	8/21/2013 8:52:01 AM	AutQA Vendor Account description	Ireland
	9/20/2013 7:52:27 AM	AutQA Vendor Account description	Ireland
	2/12/2014 5:47:26 PM	AutQA Vendor Account description	Ireland
	2/12/2014 5:48:17 PM	AutQA Vendor Account description	Ireland
	2/12/2014 5:48:32 PM	AutQA Vendor Account description	Ireland
5/6/2012		Default Account	History
5/7/2012		Default Account	Negro folk music U.S.A
	11/26/2012 10:05:28 AM	Default Account	100 Years of American Folklore Studies

Report

4. Select the **Criteria** tab and add a new column of any kind.
5. Select the More Options icon

of the new column and select **Edit Formula**. The Column Formula dialog box is displayed:



Column Formula

6. Delete the existing formula.
7. Enter `TIMESTAMPDIFF(SQL_TSI_DAY,"PO Line"."Sent Date","Physical Item Details"."Receiving Date")`

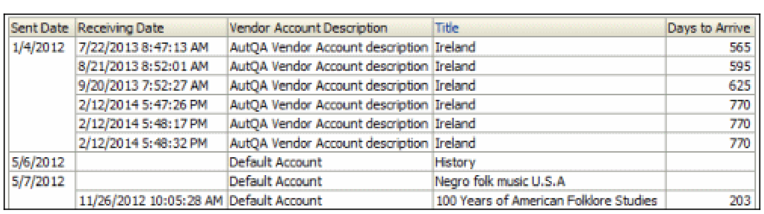
   The following are the elements of the formula:

   - TIMESTAMPDIFF – display the difference of two dates
   - SQL_TSI_DAY – display the unit in days
   - The first value (`PO Line.Sent Date)` – the date from which you want to subtract
   - The second value (`Physical Item Details.Receiving Date)`– the date to subtract.
8. Select the More Options icon

   of the new column and select **Column Properties > Column Format** and enter a new name for the column in the Column Heading field.

   The following is an example of the results:



Sent Date	Receiving Date	Vendor Account Description	Title	Days to Arrive
1/4/2012	7/22/2013 8:47:13 AM	AutQA Vendor Account description	Ireland	565
	8/21/2013 8:52:01 AM	AutQA Vendor Account description	Ireland	595
	9/20/2013 7:52:27 AM	AutQA Vendor Account description	Ireland	625
	2/12/2014 5:47:26 PM	AutQA Vendor Account description	Ireland	770
	2/12/2014 5:48:17 PM	AutQA Vendor Account description	Ireland	770
	2/12/2014 5:48:32 PM	AutQA Vendor Account description	Ireland	770
5/6/2012		Default Account	History	
5/7/2012		Default Account	Negro folk music U.S.A	
	11/26/2012 10:05:28 AM	Default Account	100 Years of American Folklore Studies	203

Report

The Days to Arrive column displays the number of days from when the item was ordered until it was received.

Concatenated Fields

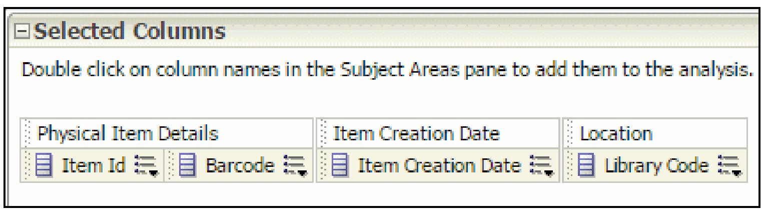
You may want to put two fields together and have text between them. For example, you now have library code and item ID in two separate columns and you want to have library code, space, dash, space, and then item ID in one column. This section describes one way of doing this.

Note

If you are using an Analytics report that combines subject areas, the fields that you are concatenating should be in the same subject area.

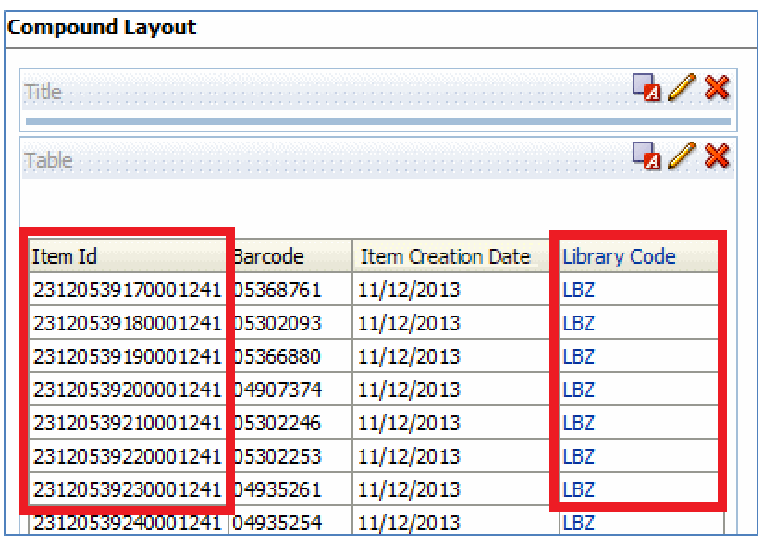
To concatenate two or more fields in an Analytics report:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns, for example:
   - Loan Details > Item ID
   - Loan Details > Barcode
   - Location > Library Code
3. From the Physical Items Subject Area, add Item Creation Date > Item Creation Date.



Selected Columns

4. Select the **Results** tab and verify that the results have the columns that you want to concatenate:

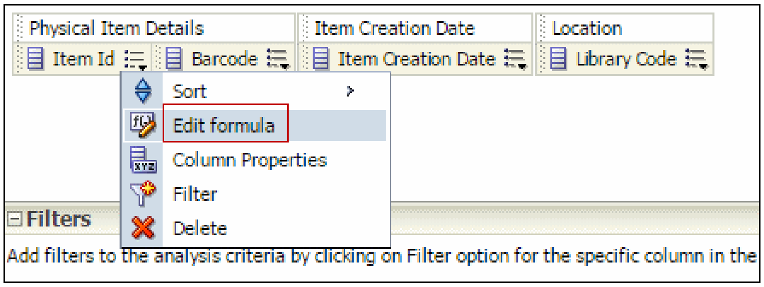


Item Id	Barcode	Item Creation Date	Library Code
23120539170001241	05368761	11/12/2013	LBZ
23120539180001241	05302093	11/12/2013	LBZ
23120539190001241	05366880	11/12/2013	LBZ
23120539200001241	04907374	11/12/2013	LBZ
23120539210001241	05302246	11/12/2013	LBZ
23120539220001241	05302253	11/12/2013	LBZ
23120539230001241	04935261	11/12/2013	LBZ
23120539240001241	04935254	11/12/2013	LBZ

Compound Layout

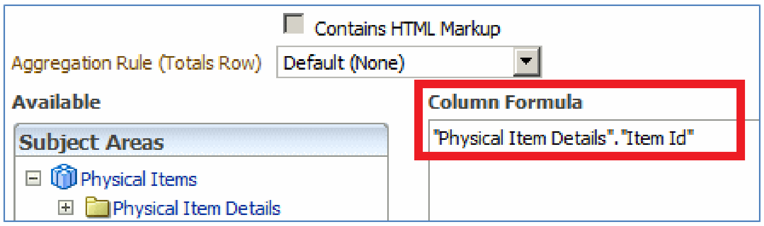
5. In the Criteria tab of each column that you want to concatenate, select the More Options icon

and then select **Edit Formula**:



Edit Formula

The formula of the column appears:



Column Formula

Note that the Item ID is `"Physical Item Details"."Item Id"` and that the Library Code is `"Location"."Library Code"`.

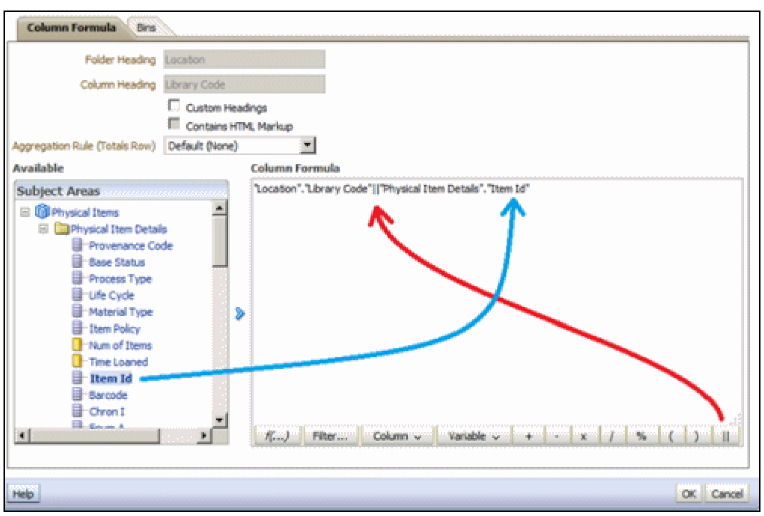
6. Select the More Options icon

and then select **Edit Formula** for one of the fields that you want to concatenate:

Edit Formula

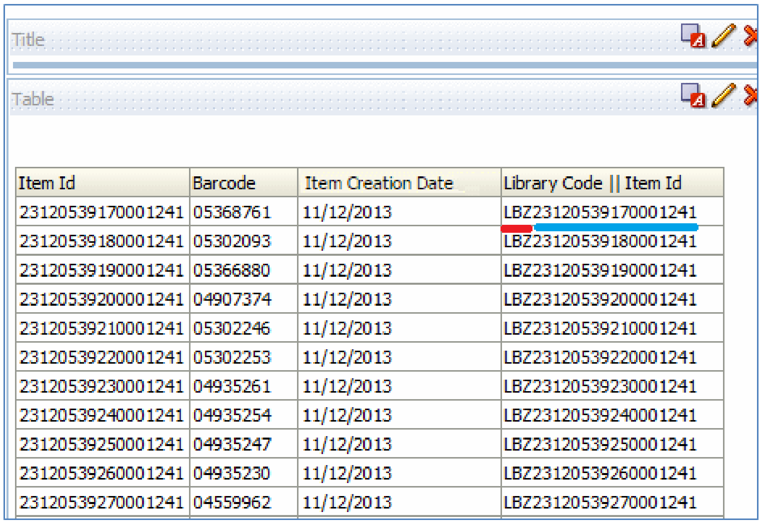
After the existing field, add a pipe and then the field (or fields) that you want to appear. For example:

```
"Location"."Library Code"||"Physical Item Details"."Item Id"
```



Column Formula

7. Select the **Results** tab. The column now contains both the library code and the item ID:



Item Id	Barcode	Item Creation Date	Library Code || Item Id
23120539170001241	05368761	11/12/2013	LBZ23120539170001241
23120539180001241	05302093	11/12/2013	LBZ23120539180001241
23120539190001241	05366880	11/12/2013	LBZ23120539190001241
23120539200001241	04907374	11/12/2013	LBZ23120539200001241
23120539210001241	05302246	11/12/2013	LBZ23120539210001241
23120539220001241	05302253	11/12/2013	LBZ23120539220001241
23120539230001241	04935261	11/12/2013	LBZ23120539230001241
23120539240001241	04935254	11/12/2013	LBZ23120539240001241
23120539250001241	04935247	11/12/2013	LBZ23120539250001241
23120539260001241	04935230	11/12/2013	LBZ23120539260001241
23120539270001241	04559962	11/12/2013	LBZ23120539270001241

Library Code and Item ID

8. Select the More Options icon

   and then select **Edit Formula**.

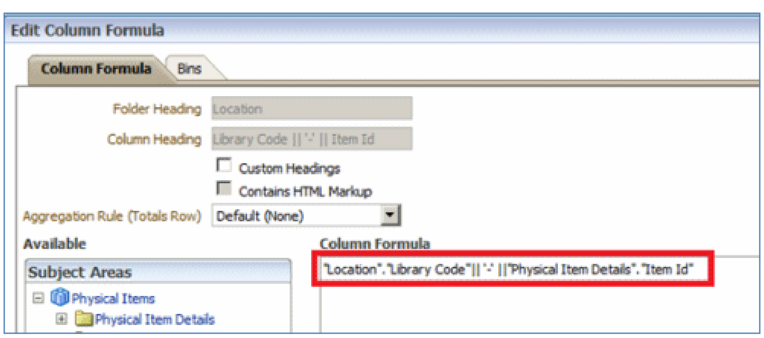
9. Add a “space dash space” surrounded by single quotes and another double pipe between the Library Code and the Item ID.

   Change the following:

```
"Location"."Library Code"||"Physical Item Details"."Item Id"
```

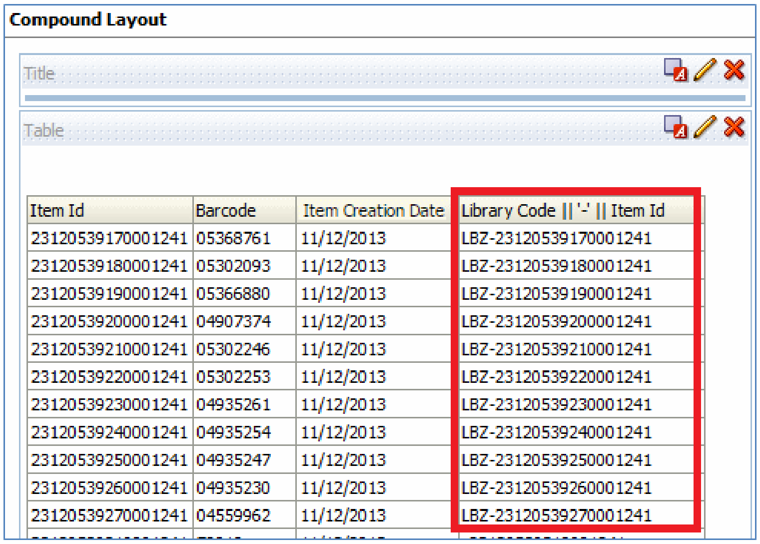
   To the following:

```
"Location"."Library Code"|| '-' ||"Physical Item Details"."Item Id"
```



Edit Column Formula

10. Select the **Results** tab. The field is concatenated with a space dash space between each part:



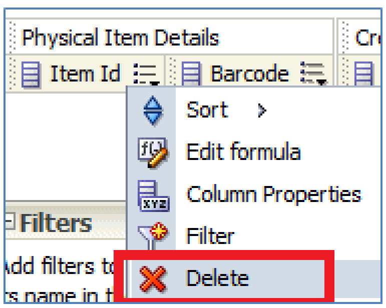
Item Id	Barcode	Item Creation Date	Library Code || '-' || Item Id
23120539170001241	05368761	11/12/2013	LBZ-23120539170001241
23120539180001241	05302093	11/12/2013	LBZ-23120539180001241
23120539190001241	05366880	11/12/2013	LBZ-23120539190001241
23120539200001241	04907374	11/12/2013	LBZ-23120539200001241
23120539210001241	05302246	11/12/2013	LBZ-23120539210001241
23120539220001241	05302253	11/12/2013	LBZ-23120539220001241
23120539230001241	04935261	11/12/2013	LBZ-23120539230001241
23120539240001241	04935254	11/12/2013	LBZ-23120539240001241
23120539250001241	04935247	11/12/2013	LBZ-23120539250001241
23120539260001241	04935230	11/12/2013	LBZ-23120539260001241
23120539270001241	04559962	11/12/2013	LBZ-23120539270001241

Compound Layout

11. Delete the non-desired field by selecting the More Options icon

    and selecting **Delete**.

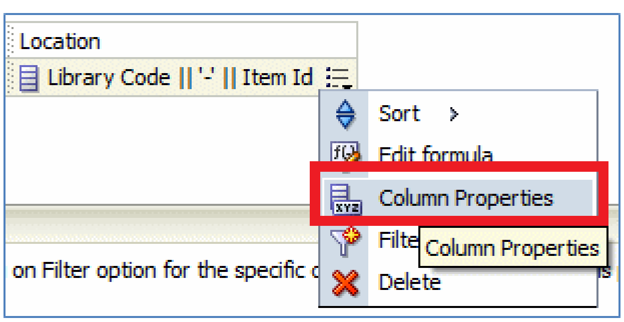
    

    Delete

12. Rename the concatenated field:
    1. Select the More Options icon

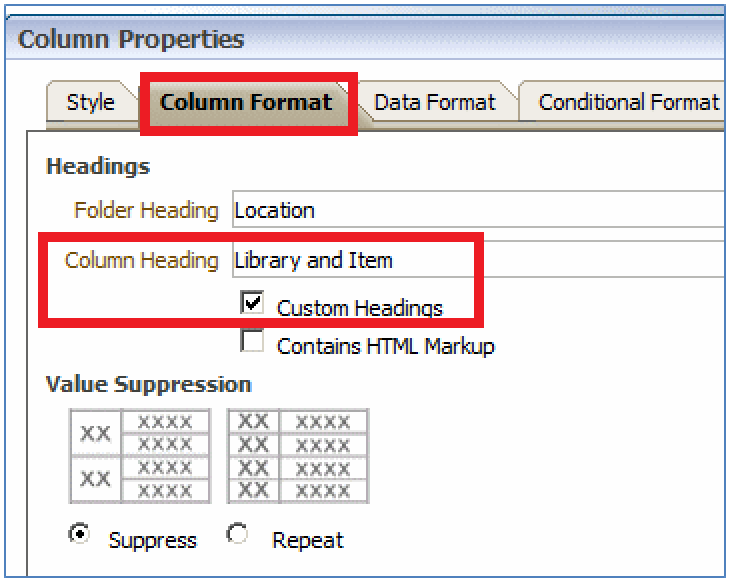
       

       and select **Column Properties**:

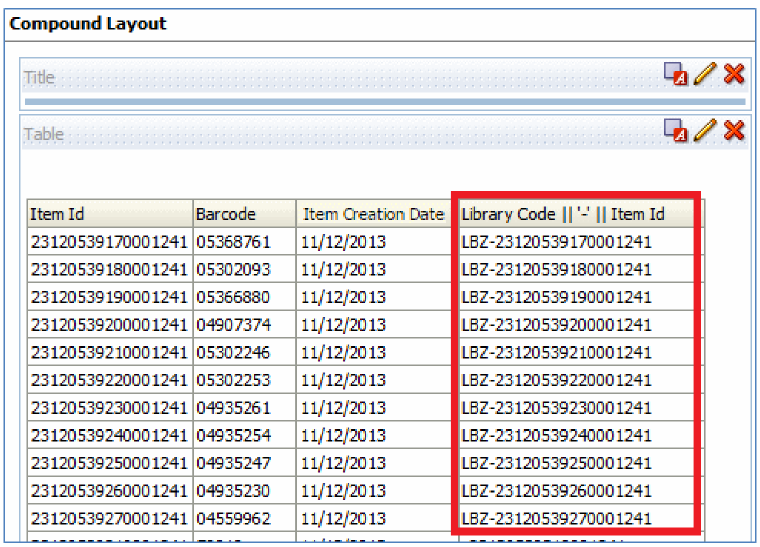
       Column Properties

    2. Enter a new name in the Column Heading field.
    3. Select the **Custom Headings** check box.



Column Heading

13. Select the **Results** tab to see the results:



Item Id	Barcode	Item Creation Date	Library Code || '-' || Item Id
23120539170001241	05368761	11/12/2013	LBZ-23120539170001241
23120539180001241	05302093	11/12/2013	LBZ-23120539180001241
23120539190001241	05366880	11/12/2013	LBZ-23120539190001241
23120539200001241	04907374	11/12/2013	LBZ-23120539200001241
23120539210001241	05302246	11/12/2013	LBZ-23120539210001241
23120539220001241	05302253	11/12/2013	LBZ-23120539220001241
23120539230001241	04935261	11/12/2013	LBZ-23120539230001241
23120539240001241	04935254	11/12/2013	LBZ-23120539240001241
23120539250001241	04935247	11/12/2013	LBZ-23120539250001241
23120539260001241	04935230	11/12/2013	LBZ-23120539260001241
23120539270001241	04559962	11/12/2013	LBZ-23120539270001241

Compound Layout

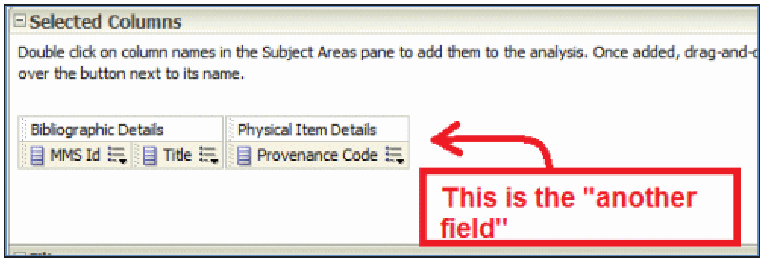
Bibliographic Records with Multi-library Holdings

This report displays all bibliographic records that have holdings in more than one library.

To create a report of all bibliographic records that have holdings in more than one library:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Physical Items**.
2. Create a report with the following columns, for example:
   - Bibliographic Details > MMSID
   - Bibliographic Details > Title
   - Another field to serve as a placeholder for a column. (It does not matter what it is, because its formula will be

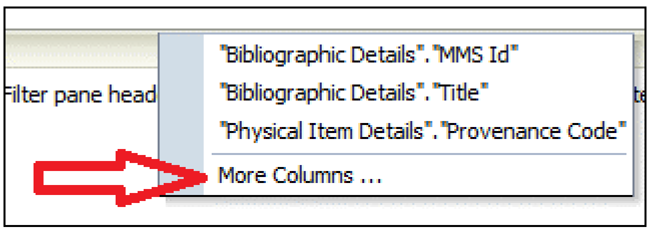
changed.) For example, Physical Item Details > Provenance Code.



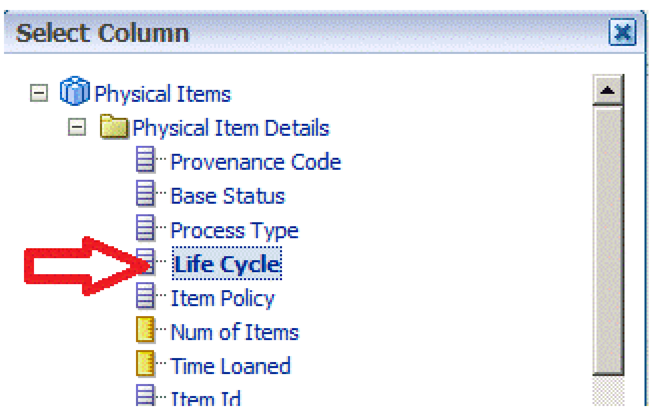
Selected Columns

3. In the lower pane, add a filter for Physical Item Details.Lifecycle to be active so that the report does not include deleted items.

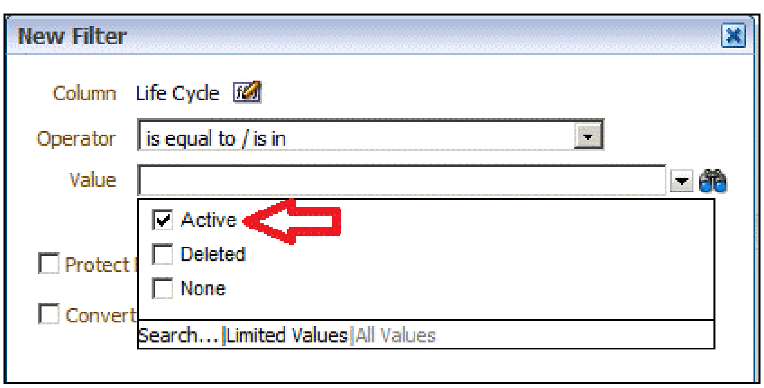
Create Filter



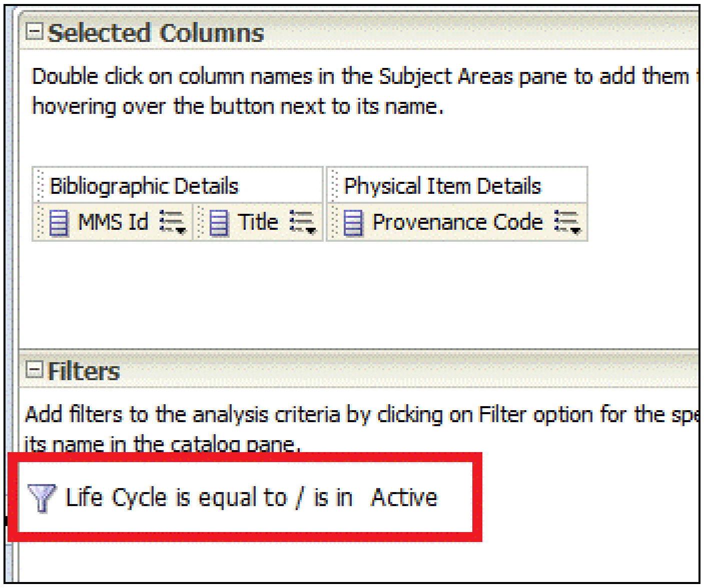
More Columns



Lifecycle

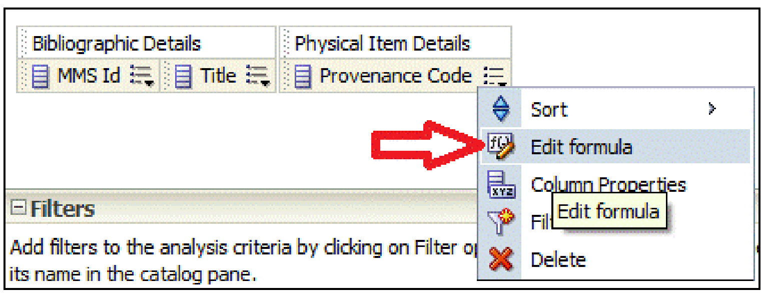


Active



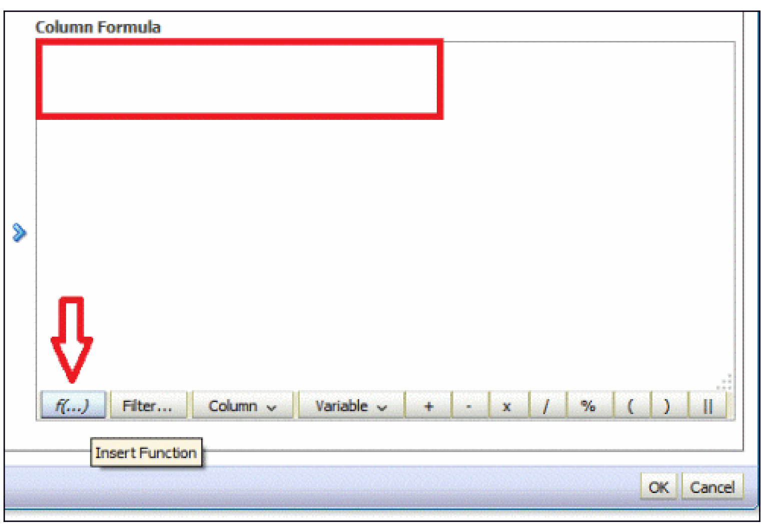
Lifecycle is Equal to Active

4. Edit the formula of Physical Item Details > Provenance Code (the placeholder column) to perform a distinct count of library codes related to the bibliographic record.

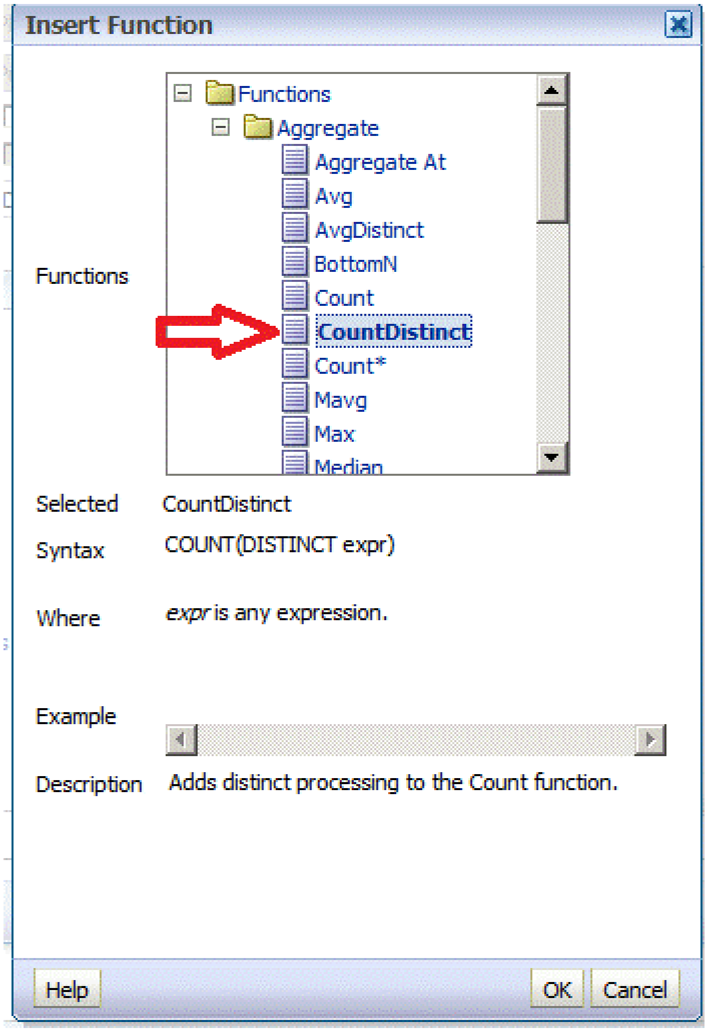


Edit Formula

5. Remove the existing formula and add a function for a distinct count.

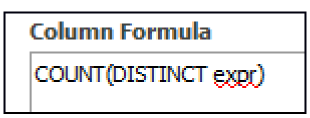


Insert Function



Count Distinct

The formula is now `COUNT(DISTINCT expr)`.

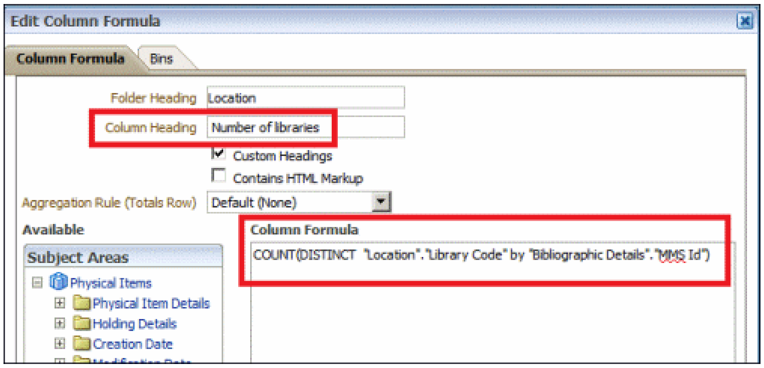


Column Formula

6. Change the Column Formula to count the library code by the MMS Id:

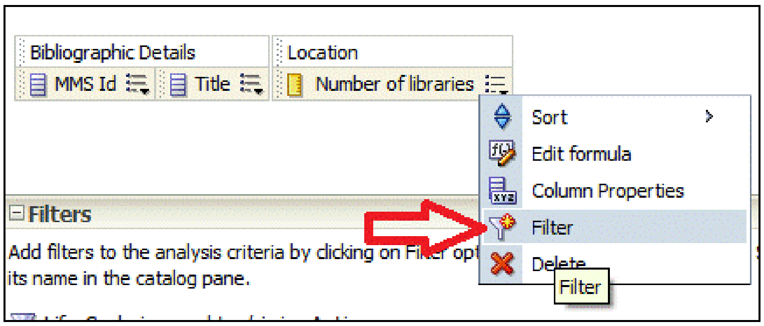
```
COUNT(DISTINCT "Location"."Library Code" by "Bibliographic Details"."MMS Id")
```

7. Change the column header to an appropriate name, for example, **Number of libraries**.

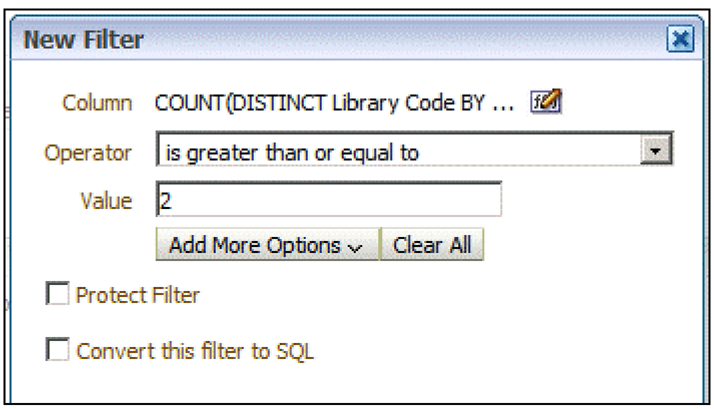


Edit Column Formula

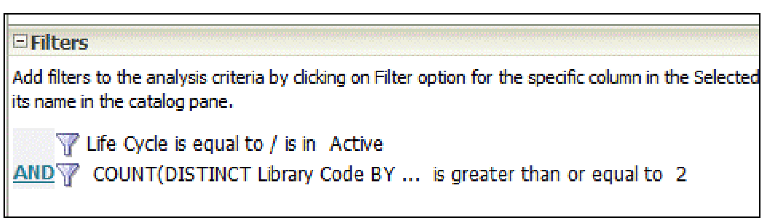
8. Filter the column with the count of libraries to have only rows with two or more libraries (is greater than or equal to 2):



Filter

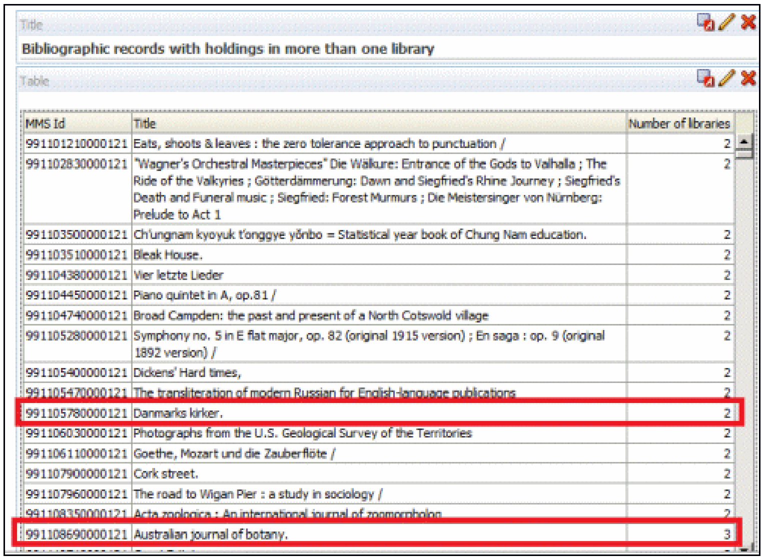


New Filter



Filters

9. Select the **Criteria** tab to display the results. For example:
   - `MMS ID 991105780000121 Danmarks kirker` – which has holdings in two libraries
   - `MMS ID 991108690000121 Australian journal of botany` – which has holdings in three libraries



Title

Bibliographic records with holdings in more than one library

Table

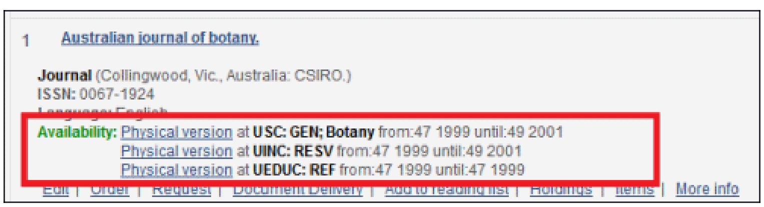
MMS Id	Title	Number of libraries
991101210000121	Eats, shoots & leaves : the zero tolerance approach to punctuation /	2
991102830000121	"Wagner's Orchestral Masterpieces" Die Walkure: Entrance of the Gods to Valhalla ; The Ride of the Valkyries ; Götterdämmerung: Dawn and Siegfried's Rhine Journey ; Siegfried's Death and Funeral music ; Siegfried: Forest Murmurs ; Die Meistersinger von Nürnberg: Prelude to Act 1	2
991103500000121	Ch'ungnam kyoyuk t'onggye yŏnbo = Statistical year book of Chung Nam education.	2
991103510000121	Bleak House.	2
991104380000121	Vier letzte Lieder	2
991104450000121	Piano quintet in A, op.81 /	2
991104740000121	Broad Campden: the past and present of a North Cotswold village	2
991105280000121	Symphony no. 5 in E flat major, op. 82 (original 1915 version) ; En saga : op. 9 (original 1892 version) /	2
991105400000121	Dickens' Hard times,	2
991105470000121	The transliteration of modern Russian for English-language publications	2
991105780000121	Danmarks kirker.	2
991106030000121	Photographs from the U.S. Geological Survey of the Territories	2
991106110000121	Goethe, Mozart und die Zauberflöte /	2
991107900000121	Cork street.	2
991107960000121	The road to Wigan Pier : a study in sociology /	2
991108350000121	Acta zoologica : An international journal of zoomorpholog	2
991108690000121	Australian journal of botany.	3

Report Results

The following is `MMS ID 991105780000121 Danmarks kirker` which has holdings in two libraries:

Danmarks Kirker

The following is `MMS ID 991108690000121 Australian journal of botany` which has holdings in three libraries:



Australian Journal of Botany

Conditional Fields

You can use the CASE condition to have an alternate text displayed as a value in an analytics report. The syntax is slightly different if the value is numerical or text. In this example, the CASE condition is used to make the following changes:

- The value for the column **Time Loaned**, is changed to `Not< Loaned` if the value is `0` and Loaned if the value is not `0`
- The value for the column **Publisher** is changed to `Reidel Publishing` if the value is `Reidel Pub Co`; otherwise, it is not changed

To use the CASE condition:

1. Create a report using, for example, the following columns from the Physical Items subject area:

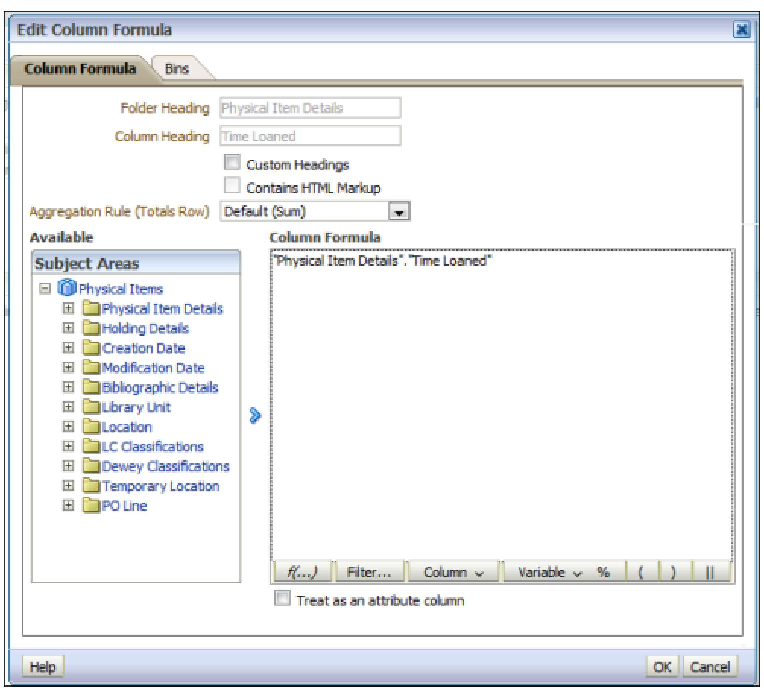
- Bibliographic Details > MMS ID
- Physical Details > Time Loaned
- Bibliographic Details > Publisher

MMS Id	Time Loaned	Publisher
9914631030001361	0	enguin
9914631050001361	0	Vorld Scientific
9914631060001361	10	oubleday
9914631070001361	0	Merrill
9914631100001361	2	larperPerennial
9914631110001361	0	ryden Press
9914631150001361	2	dams Media
9914631180001361	1	lacmillan
9914631220001361	1	lsevier Saunders
9914631240001361	0	eidel Pub Co
9914631260001361	0	ife Insurance Federation of Australia
9914631280001361	0	uke University Press
9914631300001361	0	ryphon
9914631330001361	0	ams
9914631350001361	0	lethuen
9914631390001361	0	Jniversity of Queensland Press
9914631420001361	1	oubleday Australia
9914631440001361	0	I T I S
9914631470001361	1	pringer
9914631500001361	0	vionics Communications

Time Loaned

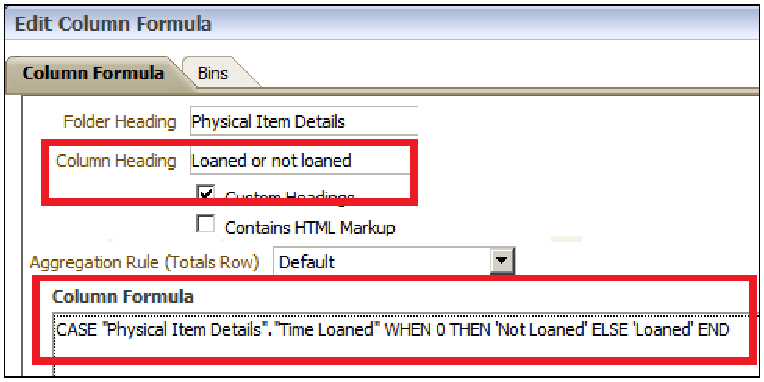
2. From the Criteria column, select the More Options icon

of the Time Loaned column and select **Edit Formula**. The Column Formula dialog box is displayed:



Edit Column Formula – Time Loaned

3. In the Column Formula box, insert one of the following formulas instead of the existing text and change the folder heading, if desired:
   - `CASE "Physical Item Details"."Time Loaned" WHEN 0 THEN 'Not Loaned' ELSE 'Loaned' END`
   - `CASE WHEN "Physical Item Details"."Time Loaned" = 0 THEN 'Not Loaned' ELSE 'Loaned' END`



Edit Column Formula for Time Loaned – CASE Condition

4. From the Criteria column, select the More Options icon

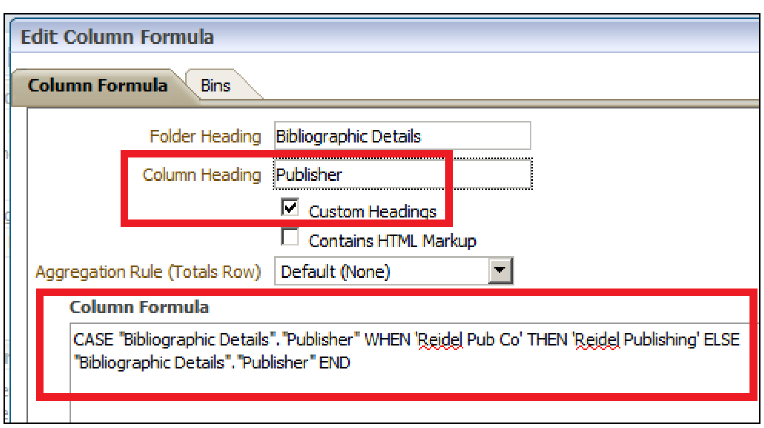
   

   of the Publisher column and select **Edit Formula**.
5. In the Column Formula box, insert the following formula instead of the existing text and change the folder heading, if desired. (Note the single quotes around the conditional text):

```
CASE "Bibliographic Details"."Publisher" WHEN 'Reidel Pub Co' THEN 'Reidel
Publishing' ELSE "Bibliographic Details"."Publisher" END
```

Note

If you copy and paste the above text, it is recommended to manually retype the single quotes because the Windows copy and paste feature may change them to a different character, resulting in an error message.



Edit Column Formula for Publisher

The following report displays the changed results:

MMS Id	Loaned or not loane	Publisher
991463103000136	Not Loaned	Penguin
991463105000136	Not Loaned	World Scientific
991463106000136	Loaned	Doubleday
991463107000136	Not Loaned	Merrill
991463110000136	Loaned	HarperPerennial
991463111000136	Not Loaned	Dryden Press
991463115000136	Loaned	Adams Media
991463118000136	Loaned	Macmillan
991463122000136	Loaned	Elsevier Saunders
991463124000136	Not Loaned	Reidel Publishing
991463126000136	Not Loaned	Life Insurance Federation of Australia
991463128000136	Not Loaned	Duke University Press
991463130000136	Not Loaned	Gryphon
991463133000136	Not Loaned	Sams
991463135000136	Not Loaned	Methuen
991463139000136	Not Loaned	University of Queensland Press
991463142000136	Loaned	Doubleday Australia
991463144000136	Not Loaned	N T I S
991463147000136	Loaned	Springer
991463150000136	Not Loaned	Avionics Communications

Results With CASE Condition

Conditional Text

You can change the text in an analytics report to be different colors in order to identify different values at a glance. The following report will be used as an example:

Inv. Payment Status	itle	Publisher	Net Price	ISSN
Not Paid	cta mathematica Hungarica	Akadémiai Kiadó	470	1588-2632; 0236-5294
Not Paid	dvertising age	Crain Communications	110	1557-7414; 0001-8899
Not Paid	lgorithmica	Springer-Verlag	800	1432-0541; 0178-4617
Not Paid	nnals of mathematics	University of Virginia	120	1939-8980; 0003-486X
Not Paid	pplied research in quality of life.	Springer	60	1871-2576; 1871-2584
Not Paid	hicago tribune	Tribune Co	650	2165-171X; 1085-6706
Paid	rain's New York business.	Crain Communications Inc	140	8756-789X
Not Paid	ifferential equations	MAIK Nauka/Interperiodica	430	1608-3083; 0012-2661
Not Paid	uropean journal of organic chemistry	Wiley-VCH	730	1099-0690; 1434-193X
Not Paid	uropean physical journal H	EDP Sciences; Springer Verlag	920	2102-6467; 2102-6459
Not Paid	enetica	Kluwer Academic Publishers	890	1573-6857; 0016-6707

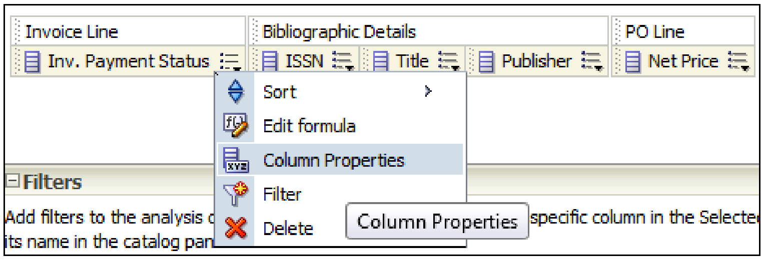
Example Report

To conditionally change the text format in an Analytics report:

1. From the Inv. Payment Status field, select the More Options icon

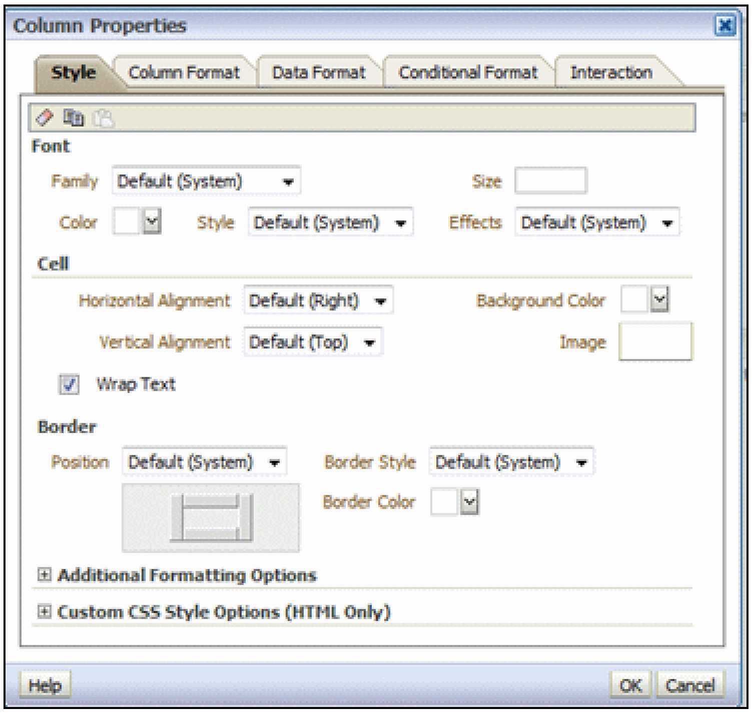
   

   and select **Column Properties**:



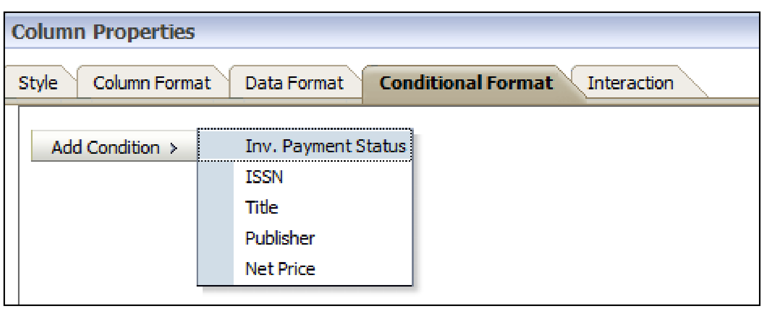
Column Properties

The Column Properties dialog box appears.



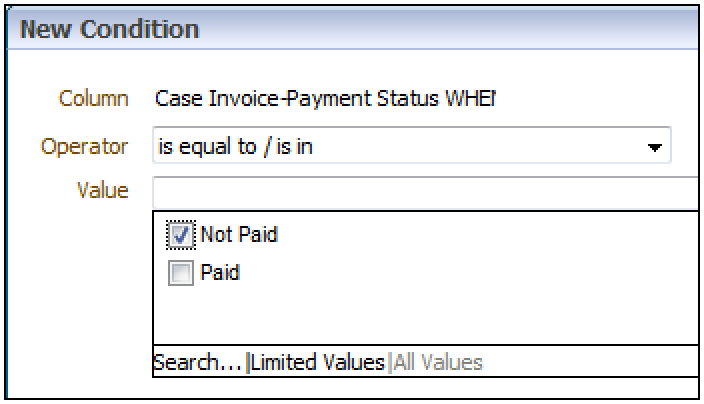
Column Properties Dialog Box

2. Select the **Conditional Format** tab **> Add Condition > Inv. Payment Status**:



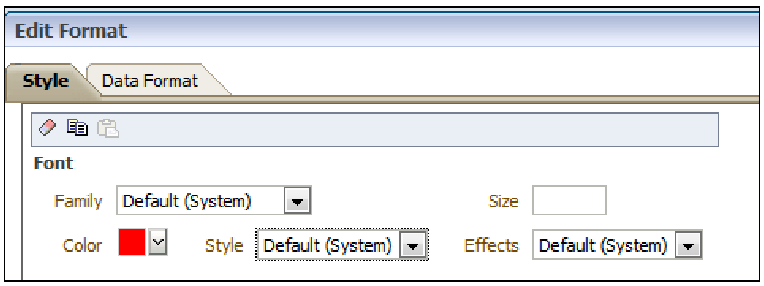
Conditional Format

The following appears:



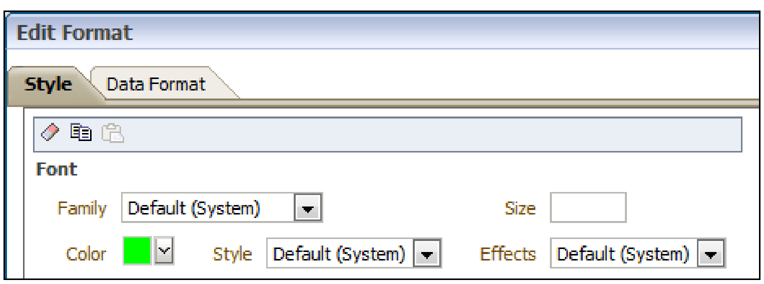
New Condition

3. Select the value whose format you want to change (for example, **Not Paid**) and select the color that you want the value to be (for example, red):



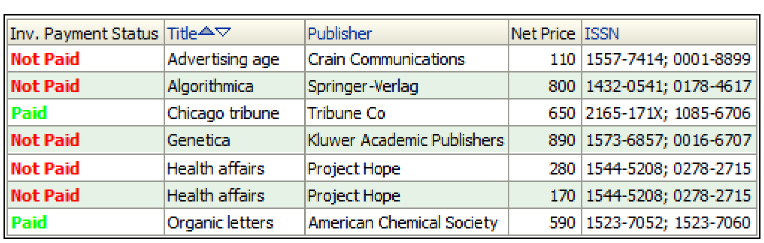
Red Font

4. Do the same for all other values that you want to format with a color:



Green Font

The report now appears with the words **Not Paid** in red and **Paid** in green:



Inv. Payment Status	Title	Publisher	Net Price	ISSN
Not Paid	Advertising age	Crain Communications	110	1557-7414; 0001-8899
Not Paid	Algorithmica	Springer-Verlag	800	1432-0541; 0178-4617
Paid	Chicago tribune	Tribune Co	650	2165-171X; 1085-6706
Not Paid	Genetica	Kluwer Academic Publishers	890	1573-6857; 0016-6707
Not Paid	Health affairs	Project Hope	280	1544-5208; 0278-2715
Not Paid	Health affairs	Project Hope	170	1544-5208; 0278-2715
Paid	Organic letters	American Chemical Society	590	1523-7052; 1523-7060

Report with Color Formatting

Prompts

You can create an Analytics report with prompts that ask you to select the variables with which to create a report. The report in this example is for loans in Main Library by date and location. You are prompted to enter a date range and location which are used to create the report.

Note

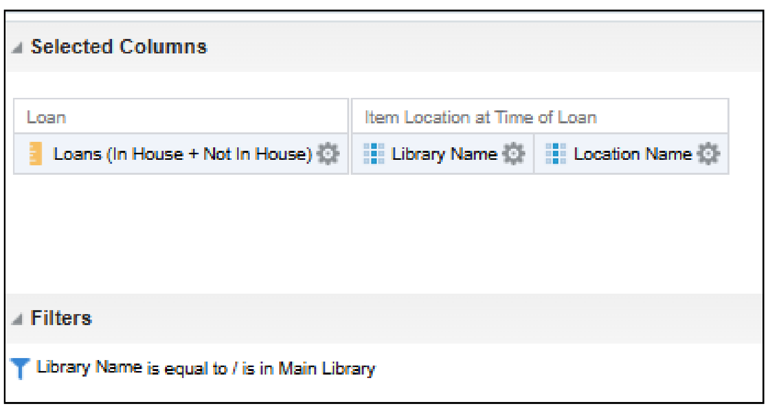
Although there are three kinds of prompts available in analytics reports (column prompt, variable prompt, and image prompt), this example only demonstrates the column prompt.

To create this analytics report:

1. From the Analytics dashboard, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Select the following columns:
   - Loan > Loans (in House + Not in House)
   - Item Location at Time of Loan > Library Name
   - Item Location at Time of Loan > Location Name
3. From the Library Name field, select the Settings icon

   and select **Filter**.
4. Filter the results to `Library Name is equal to / is in Main Library`.

   Report Criteria

   Note

   Do not set filters for the columns that you want to have a prompt.

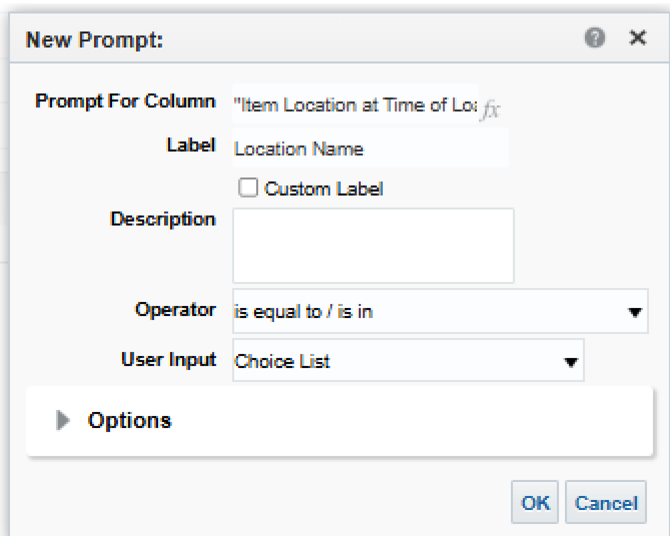
   ---

5. Select the **Results** tab. The following, for example, is displayed:

Loans (In House + Not In House)	Library Name	Location Name
15	Main Library	Acquisitions Dept
4		Cataloging-Metadata Dept
10,734		Chinese Collection
4,357		Chinese Collection (CHINP)
30		Chinese Collection Oversize
54		Chinese Collection Reference
7		Conservation Lab
17,367		Course reserve
31		Government Oversize
4,964		Government Stacks

Report Results

6. Select the **Prompts** tab and then the plus sign to add a new prompt.
7. Select **Column Prompt** and **Item Location.Location Name**. (If you want to select a column not in the report, select **More Columns...**). The following appears:

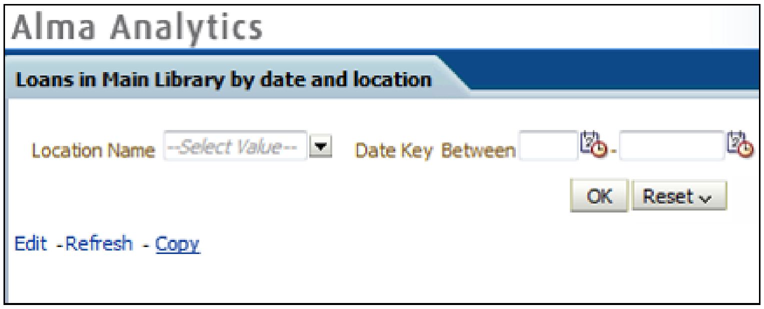


New Prompt: Location Name

8. From the **Operator** drop-down list, select **Is equal to / is in** and from the **User Input** drop-down list, select **Choice List**.
9. Create a prompt for Loan Date:
    1. Select the plus sign, select **More Columns...**, and select **Loan Date > Loan Date** since it is not in the report.
    2. From the **Operator** drop-down list, select **is between**, and from the **User Input** drop-down list, select **Calendar**.
10. Run the report by selecting **Open** (not Edit).

Run Report

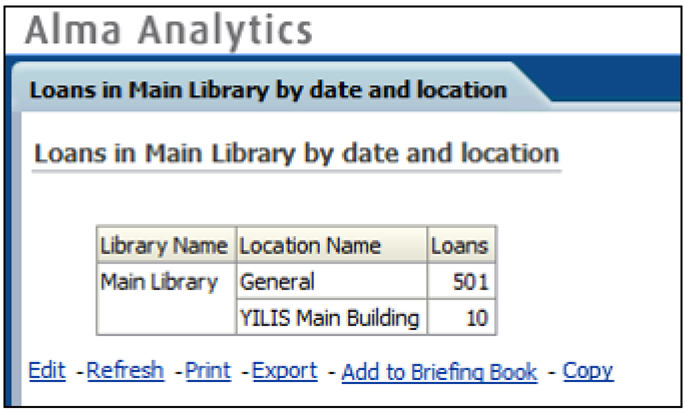
The prompts appear:



Prompts

11. Fill in the prompts and select **OK**.

    The report is displayed with the criteria you entered at the prompts:



Report

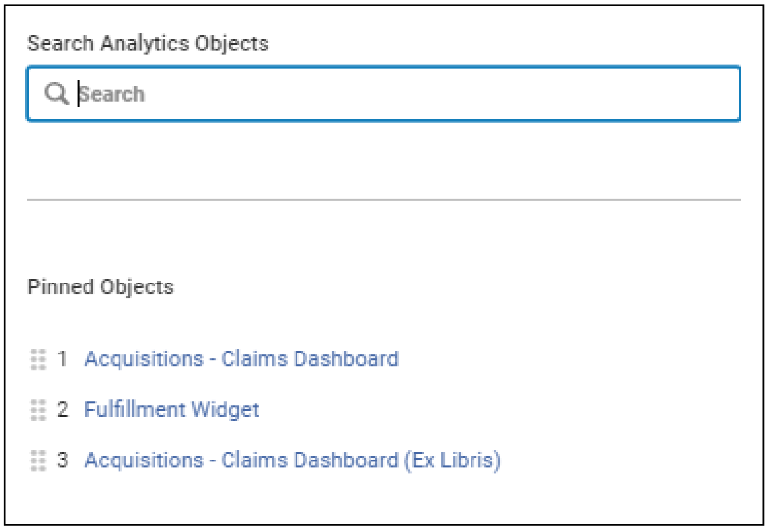
Note

For some prompts, the possible values of the prompt are not refreshed when new values are added in Alma after the report is created. If this happens, edit the prompt and from the Options area select **Choice List Values > SQL Results**. In the text box after `Select <field name> from <subject area name>` add `where current_date = current_date`.

For example: `SELECT "Item Location at Time of Loan"."Location Name" FROM "Fulfillment" where current_date = current_date`

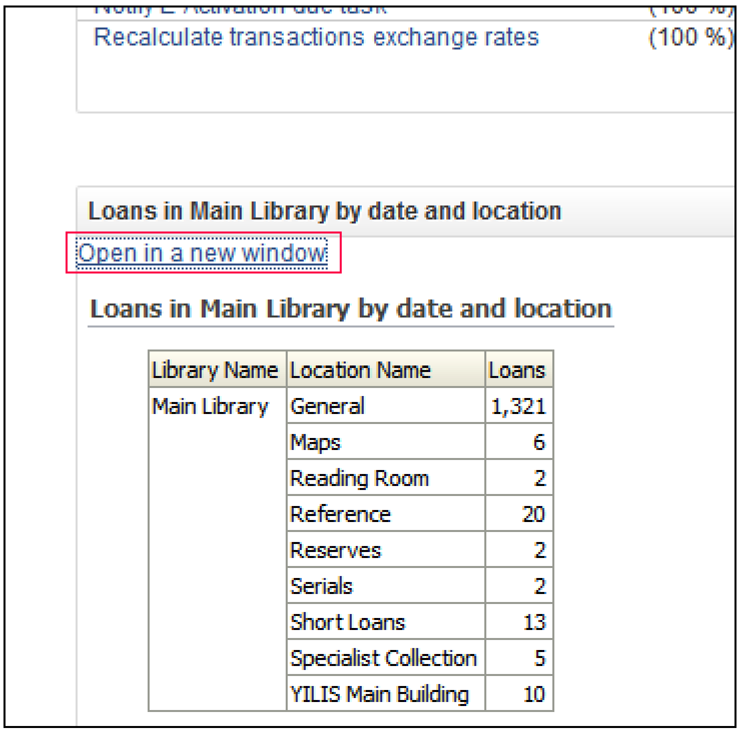
You can add the report to your pinned objects under the Analytics menu or the dashboard as a widget and run the report from that location (for more information, see Working with Analytics Objects):

- From Pinned Objects:



Pinned Objects

- From the dashboard, select **Open in a new window**:



Library Name	Location Name	Loans
Main Library	General	1,321
	Maps	6
	Reading Room	2
	Reference	20
	Reserves	2
	Serials	2
	Short Loans	13
	Specialist Collection	5
	YILIS Main Building	10

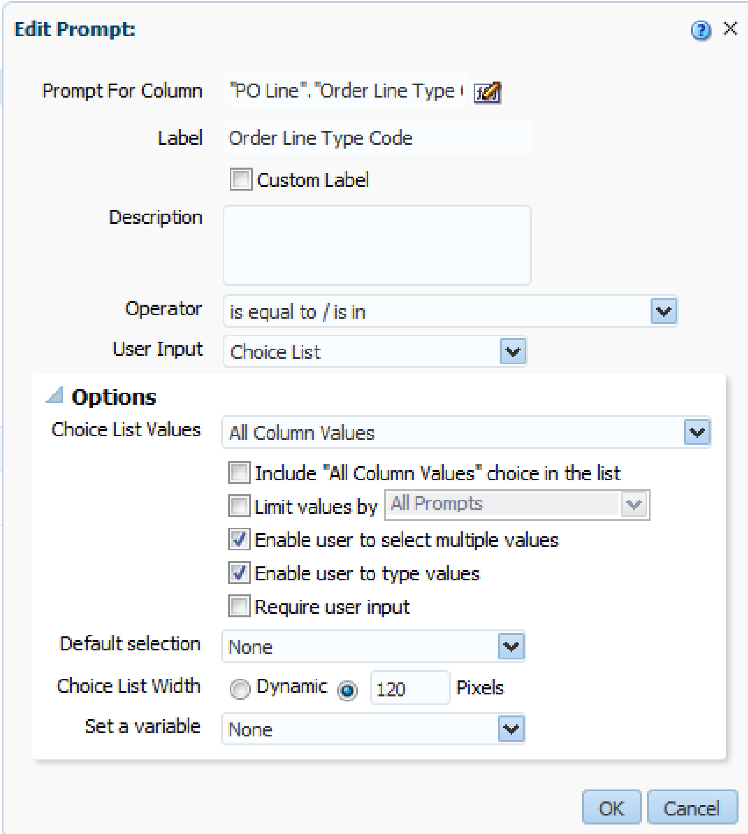
Report in Dashboard

Removing the NULL Value from a Prompt

You can remove the NULL value from the possible values for a prompt.

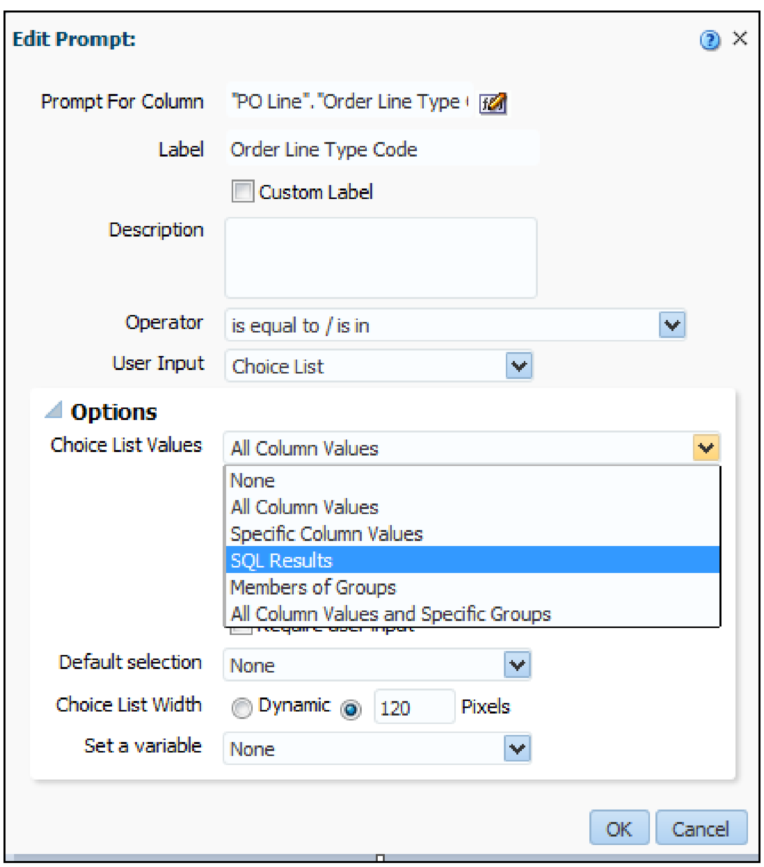
To remove the NULL value from the possible values for a prompt:

1. Select the prompt and select **Edit Prompt**. The following appears:



Edit Prompt

2. From the **Choice List Values** drop-down list, select **SQL Results**.



Choice List Values

3. Select **OK**.

The NULL value does not appear in the list of possible values for the prompt.

Prompts (Dashboard)

You can create a dashboard prompt that allows you to filter the results of a report within a dashboard.

Note

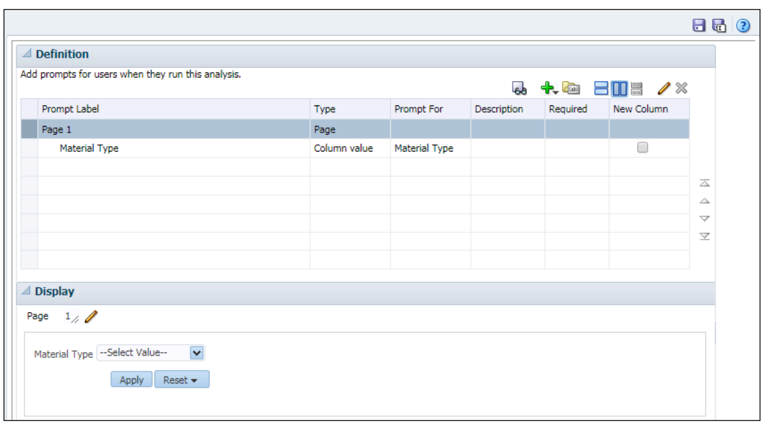
For more information on creating dashboards, see Creating a Dashboard.

There are three steps in creating a prompt in a dashboard:

1. Create the prompt.
2. Create a report that will use the prompt.
3. Create a dashboard and associate the prompt and the report to it.

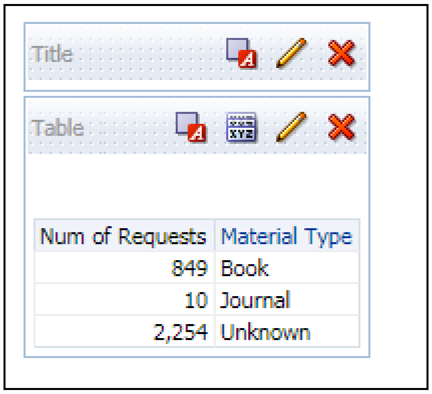
To create a prompt in a dashboard:

1. Create the prompt.
    1. Select **New > Dashboard Prompt > Borrowing Requests**.
    2. Select the **New** icon and select **Column Prompt**.
    3. Select **Bibliographic Details > Material Type** and select **OK**.
    4. Select the options you want and select **OK**.

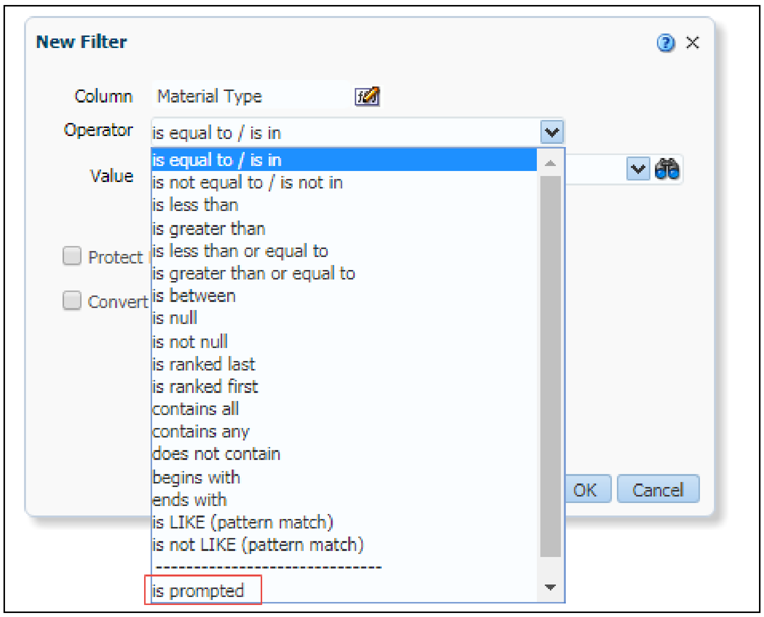
    New Dashboard Prompt

    5. Save the prompt.
2. Create a report that will use the prompt.
    1. Select **New > Analysis**.
    2. Create a report with the **Borrowing Request Details > Number of Requests** and **Bibliographic Details > Material Type fields**.



Material Type Report

   3. Add the **is prompted** filter to the Material Type field.



Is Prompted

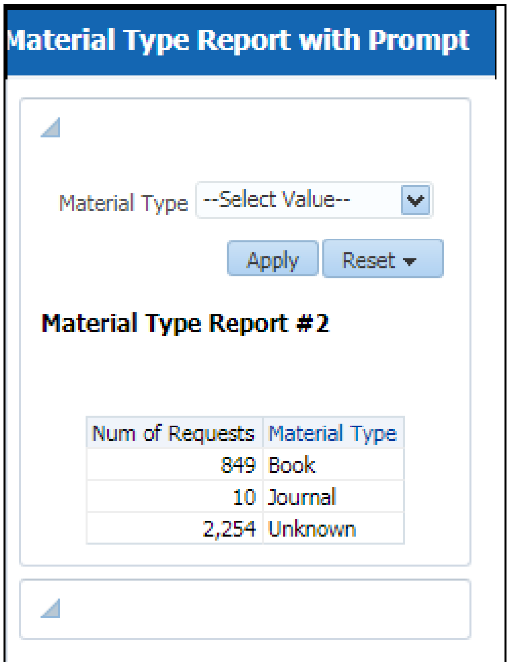
   4. Save the report.

3. Create a dashboard and associate the prompt and the report to it.

   1. Select **New > Dashboard > Edit**.

   2. From the left pane, select the report and prompt you created.

      The dashboard shows the report and the prompt that can be used to filter the report.



Dashboard with Prompt

3. Save the dashboard.

Using Report Output as Input Data

It can be useful to take the output of one report and use it as input in another report. For example, a report in one subject area can be used as input for a report in a different subject area. This provides a means of combining the dimensions of various subject areas together in one report.

For example, you want to determine the effectiveness of a fund by checking the fund for the number of loans per item according to several criteria, such as arrival date and vendor.

Note

When using a report output as input data, the limit of the size of the input report is the same limit as all reports: up to 10 million rows from **Export > Data > Excel/CSV/Tab delimiter** and up to 2 million cells from **Export > Formatted > Excel**.

In the Physical Items subject area, you can get a list of items and the number of loans per item for the criteria. However, the Physical Items subject area does not have a Fund field, so you cannot get a list of loans by fund from which the item was ordered.

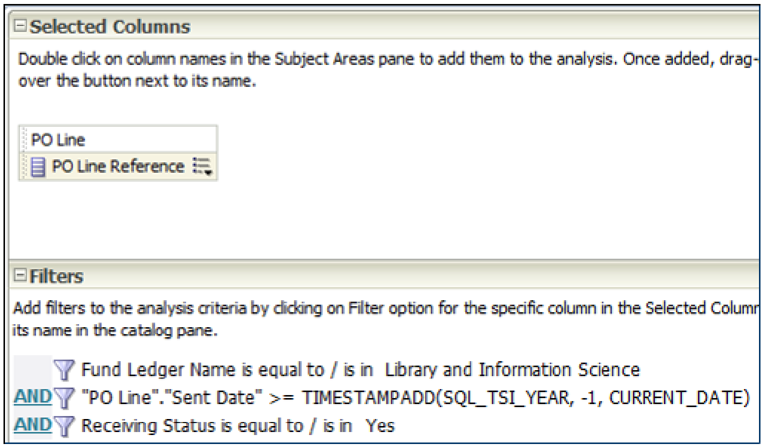
On the other hand, in the Funds Expenditures subject area there is a Fund field, but there is no Number of Loans field.

To get the data you want, you first make a report of the PO Line reference (order line number) using the Funds Expenditures subject area and then use the results from that report as input in a second report with the Physical Items subject area. This is done using the `is based on the results of another analysis` filter.

To use the output of an analytics report as the input for another report:

1. Create a report with the **Fund Expenditure > Fund Ledger > PO Line Reference** field.

2. Apply the following filters:
    - Set the fund ledger name to `Library and Information Science`.
    - Set the PO line sent date to be within the last year.
    - Set the receiving status to be `yes`.



PO Line Reference Field with Filters

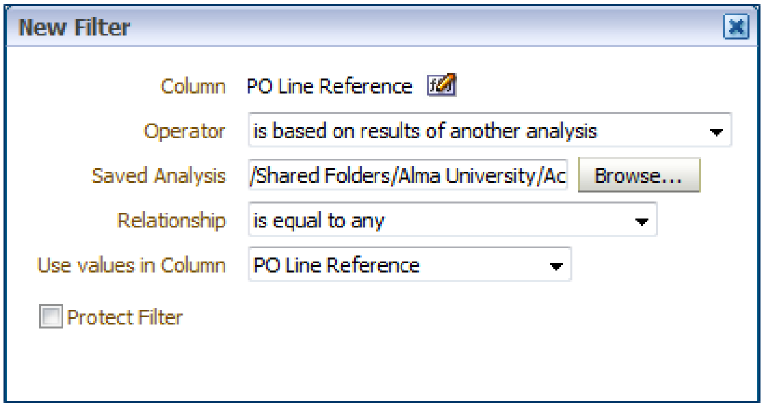
The following is an example of the report:

PO Line Reference
POL-43401
POL-43536
POL-43545
POL-43547
POL-43550
POL-43565
POL-43574
POL-43577
POL-43593
POL-43607
POL-43608
POL-43609
POL-43627
POL-43628
POL-43629
POL-43691
POL-43696
POL-43697

PO Line Reference Report

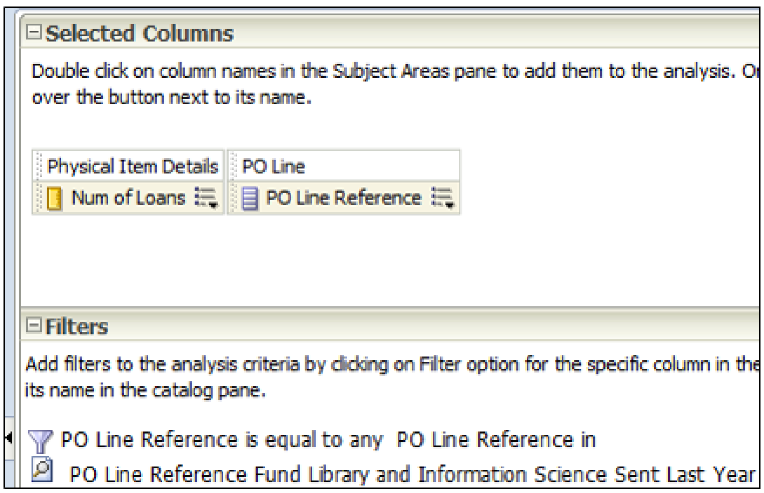
3. Create a report with the **Physical Items > PO Line > PO Line Reference** field.
4. Select the following filters in the **New Filter** dialog box:
    - **Operator** – `is based on results of another analysis` filter.
    - **Saved Analysis** – select the report you made with the Fund Expenditure subject area
    - **Relationship** – set to `is equal to any`

- **Use Values in Column** – `PO Line Reference`



Filter

These settings filter the results by PO Line Reference Number based on the fund, so that the report displays the number of loans for each PO Line Reference based on the fund even though the Fund field is not in the Physical Items subject area. The following are the criteria of the report:



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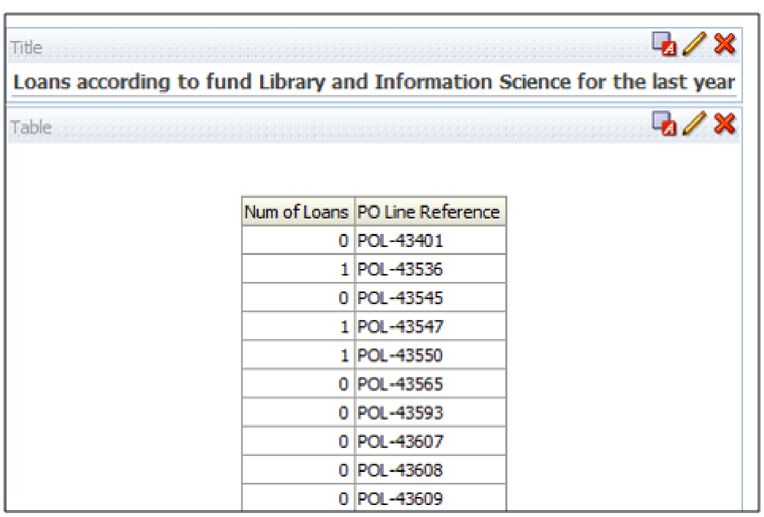
PO Line Reference Filtered By Fund

The following is an example of the report:



Num of Loans	PO Line Reference
0	POL-43401
1	POL-43536
0	POL-43545
1	POL-43547
1	POL-43550
0	POL-43565
0	POL-43593
0	POL-43607
0	POL-43608
0	POL-43609

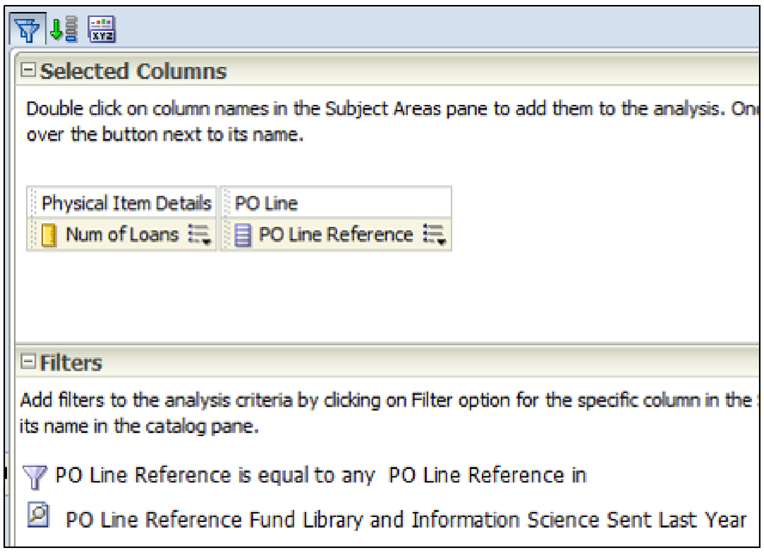
PO Line Reference Filtered By Fund – Report

Instead of just a list of the PO Line Reference Numbers and an indication of how many times items from that PO Line were loaned you may want an indication of how many total items were ordered from that fund for the given time period. This indicates how many of these items were loaned.

If the number is relatively small you can conclude that this fund is not being used effectively. Alternatively, if there is a high number of loans for items from this fund, you can conclude that this fund is being used effectively.

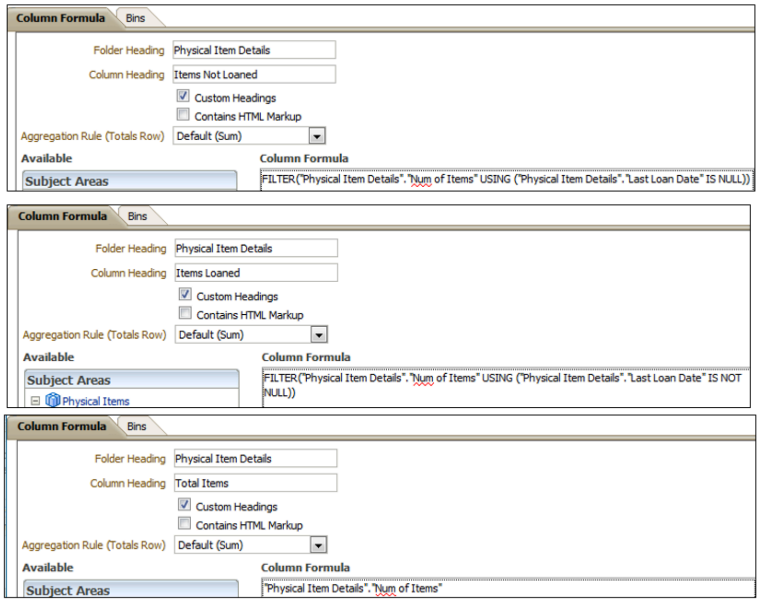
To create the report:

1. Create a report using the following criteria:



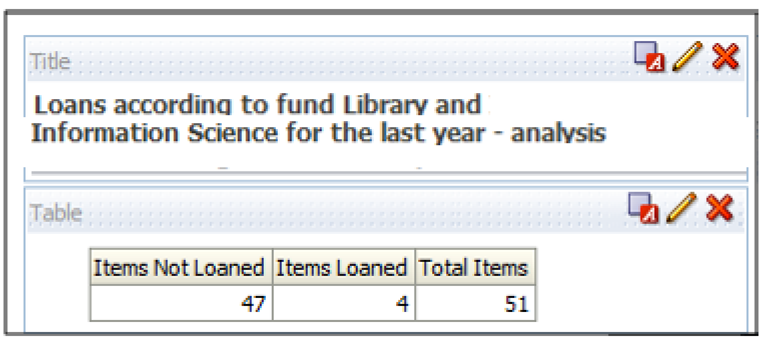
Report Criteria

2. Remove the PO Line Reference field and add two more fields, such as the Num of Loans field. These fields are just placeholders and will be renamed.
3. Use the Edit formula function to change the three fields to the following:
   - First field:
     - Column Header: **Items Not Loaned**
     - Formula: `FILTER("Physical Item Details"."Num of Items" USING ("Physical Item Details"."Last Loan Date" IS NULL))`
   - Second field:
     - Column Header: **Items Loaned**
     - Formula: `FILTER("Physical Item Details"."Num of Items" USING ("Physical Item Details"."Last Loan Date" IS NOT NULL))`
   - Third field:
     - Column Header: **Total Items**
     - Formula: `"Physical Item Details"."Num of Items"`



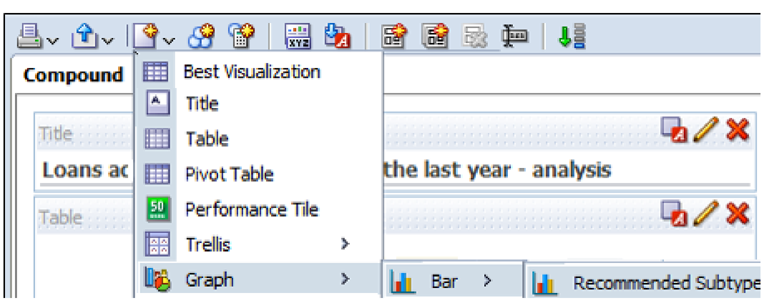
Column Formula

The following is an example of the report:



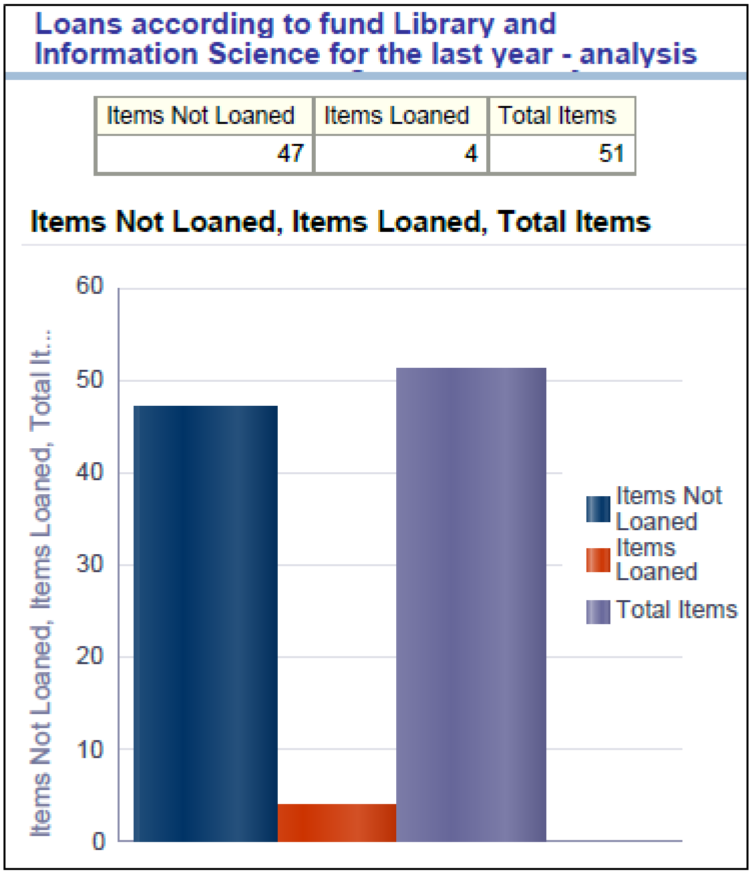
Loans According to Fund Report

You can add a graph to the report:



Graph

The following is an example of the graph:



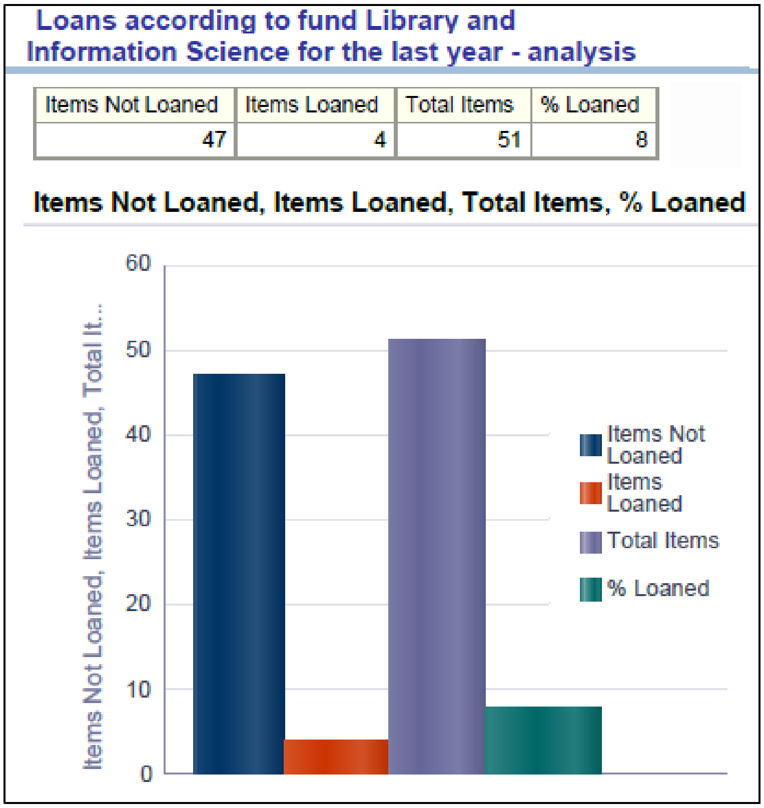
Graph Example

The graph illustrates that the fund is not very effective. Only 4 out of a total of 51 items ordered in the last year have been loaned.

To see the total percentage of items loaned out of all the items ordered, use the following filter to divide the total amount of items loaned by the total amount of items ordered and them multiply by 100:

```
(CAST(FILTER("Physical Item Details"."Num of Items" USING ("Physical Item
Details"."Last Loan Date" IS NOT NULL)) AS DOUBLE / CAST("Physical Item
Details"."Num of Items" AS DOUBLE )) * 100
```

For example:



Bar Graph with Percentage Example

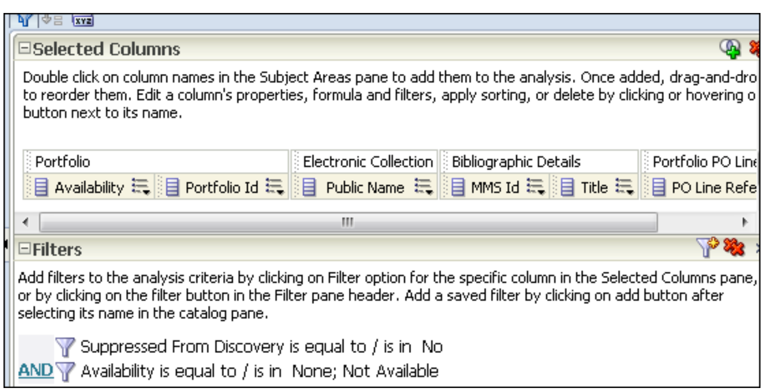
Combining Reports

This section describes how to combine two reports by using a dummy column. In the following example, the report shows all portfolios that are not available, as well as title, collection name, and PO line reference. The report shows both rows that have values for **PO Line Reference** as well as rows that have null values for **PO Line Reference**.

When combining two reports using union, the numbers of columns, data types, and filters must be the same.

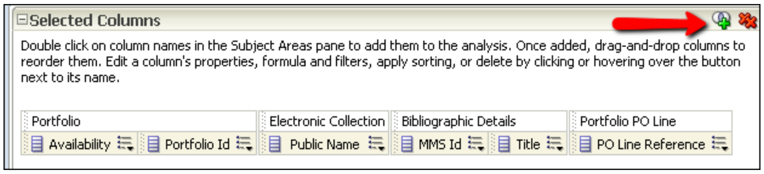
To combine two reports using union to display null values:

1. Create a report with the following fields and filters:



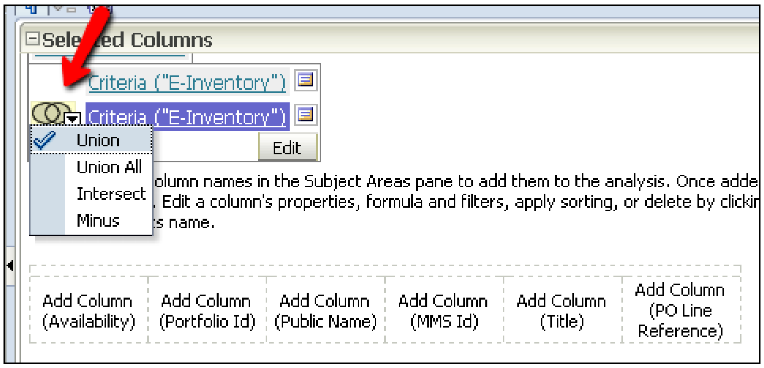
Report Columns and Filters

2. In the **Criteria** tab, select the combine sets icon and select the subject area of the original report (in this example – **E-Inventory**).



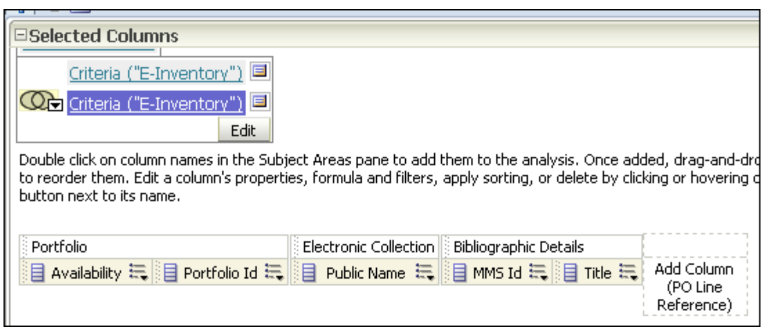
Combine Sets

3. Select the arrow to check that Union is selected.



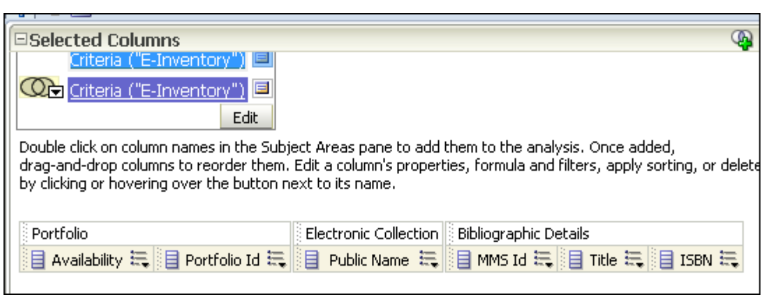
Union

4. In the left panel, find the exact same column for each column in the report, and double-click it. This puts the column in the union report. Do this for all of the columns, except for **PO Line Reference**.



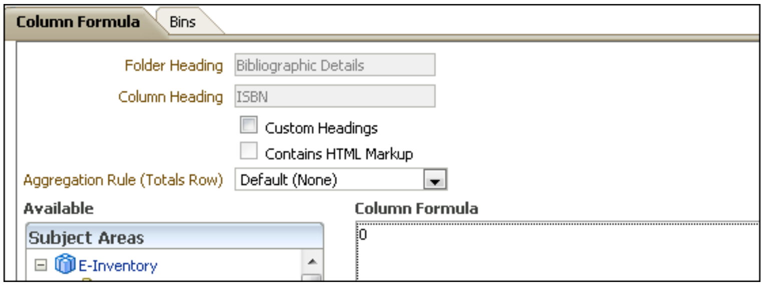
Union Report Columns

5. For the **PO Line Reference** column, select any column from the left panel, and double-click it. In this example, the ISBN column is used.



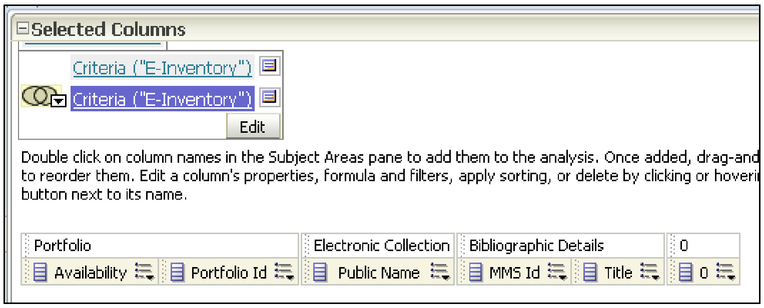
ISBN Column

6. For the **ISBN** column, select **Edit Formula**, and enter `0`. Select **OK**.



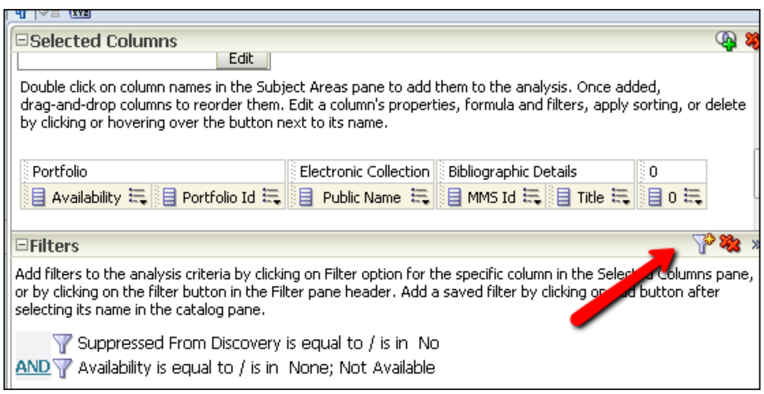
Column Formula 0

The **PO Line Reference** column is now substituted with a `0`.



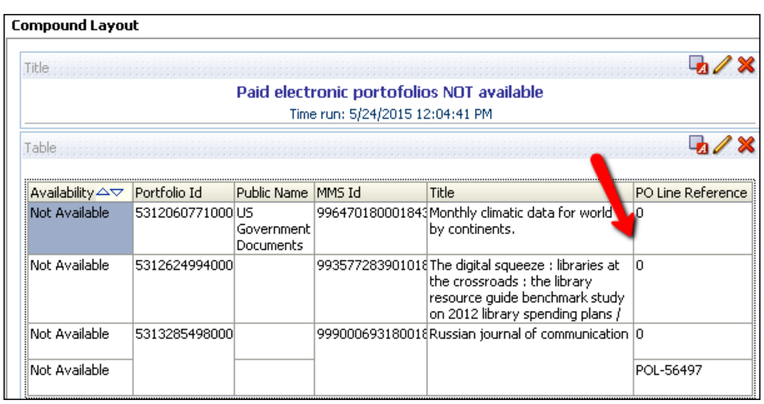
PO Line Reference Now 0

7. Using the filter pane, add the two filters that are in the original report.



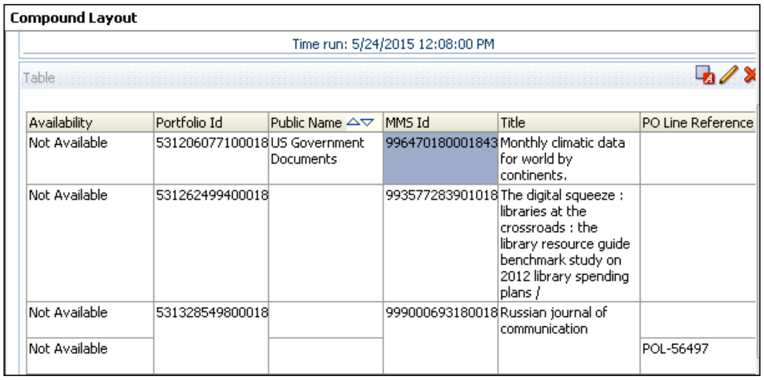
Add Two Filters

8. Select the **Results** tab to view the resulted report. The rows that do not have a value now appear with a `0`.



Rows Appear with Zero

9. Edit the formula again in the **Criteria** tab, using null instead of `0`. The rows with no PO line reference are blank.



Compound Layout

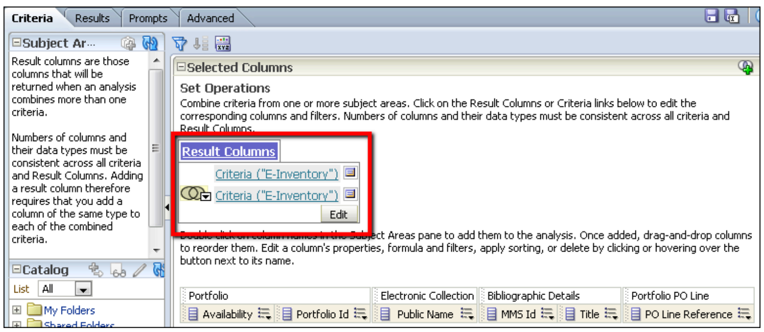
Time run: 5/24/2015 12:08:00 PM

Table

Availability	Portfolio Id	Public Name	MMS Id	Title	PO Line Reference
Not Available	531206077100018	US Government Documents	996470180001843	Monthly climatic data for world by continents.	
Not Available	531262499400018		993577283901018	The digital squeeze : libraries at the crossroads : the library resource guide benchmark study on 2012 library spending plans /	
Not Available	531328549800018		999000693180018	Russian journal of communication	
Not Available					POL-56497

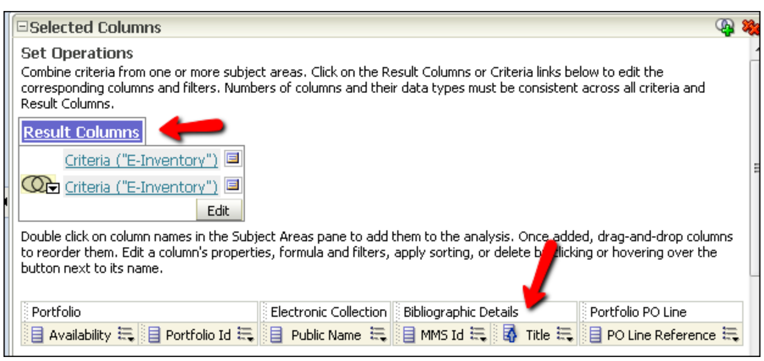
Rows Appear Blank

Select any of the links (not the Edit button) in the criteria tab to edit the reports.



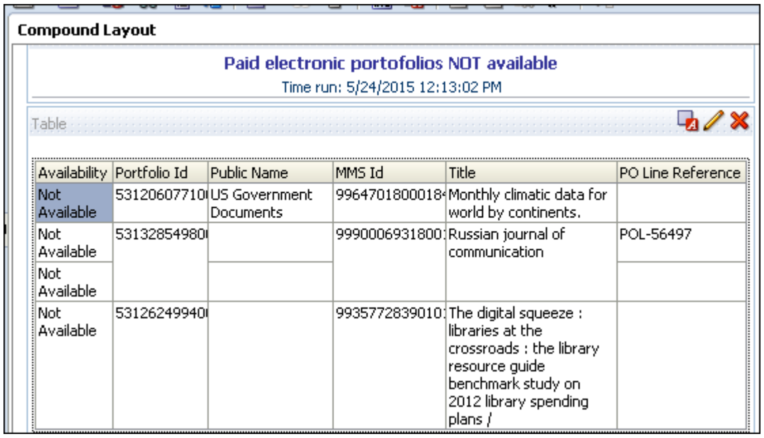
Edit Reports

Select **Result Columns** to sort the columns.



Sort Reports

The following is a report sorted by title:


Compound Layout

Paid electronic portofolios NOT available

Time run: 5/24/2015 12:13:02 PM

Table

Availability	Portfolio Id	Public Name	MMS Id	Title	PO Line Reference
Not Available	53120607710	US Government Documents	996470180001	Monthly climatic data for world by continents.	
Not Available	53132854980		999000693180	Russian journal of communication	POL-56497
Not Available					
Not Available	53126249940		993577283901	The digital squeeze : libraries at the crossroads : the library resource guide benchmark study on 2012 library spending plans /	

Sorted by Title

Editing a Default Dashboard

For information on how to edit a default Alma Analytics dashboard, see How to Edit a Default Alma Analytics Dashboard.

Sharing Analytics Reports with Other Users

For information on how you can share analytics reports with other users, see Sharing Analytics Objects with Other Users.

Filtering Procedures

For more information on using relative date filters in Analytics, see Analytics - Relative Date Filters in Analytics.

Relative Dates

This section describes how to filter an Analytics report by a date that is non-fixed, such as “greater than 7 days ago” or “sometime this year”. This is useful if you want a report of orders made in the last week or the number of items loaned in the current year. There are several ways to create such filters. This section describes one way of doing this and presents four examples.

To filter by non-fixed dates in an Analytics report:

1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns, for example:
    - Loan > Loans
    - Loan > Renewals
    - Loan Date > Loan Date

The following examples describe several ways of filtering the results by a date that is non-fixed:

Example 1 – The Last Seven Days

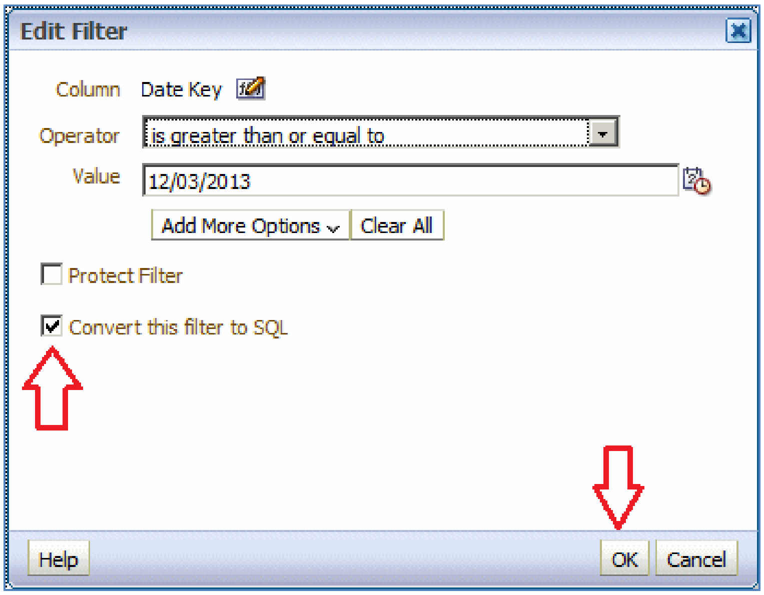
The report displays any items loaned within the last seven days.

To display any items loaned within the last seven days:

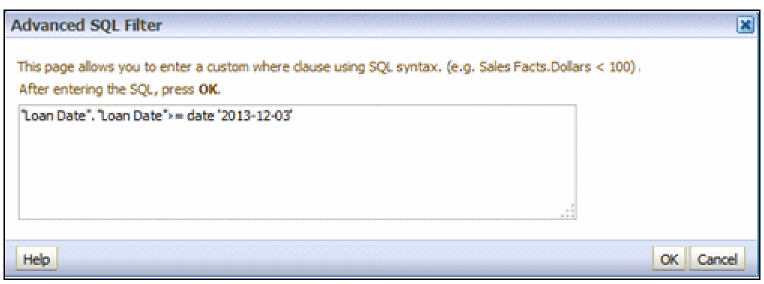
1. From the Loan Date field, select the More Options icon

   and select **Filter**.
2. Select **Convert this filter to SQL**.

   Edit Filter
3. Select **OK**. The following is displayed:

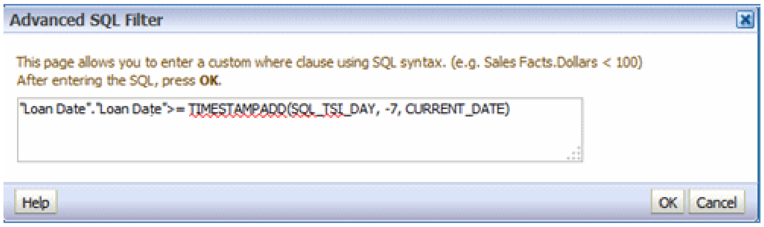
   Advanced SQL Filter
4. Change the text from:

   ```
   "Loan Date"."Loan Date" >= date '2013-12-03'
   ```

   To:

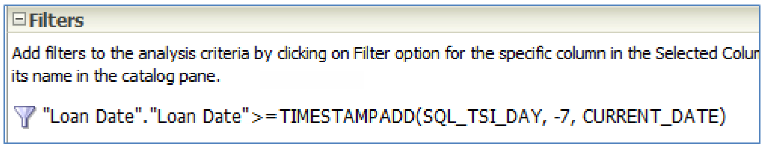
   ```
   "Loan Date"."Loan Date" >= TIMESTAMPADD(SQL_TSI_DAY, -7, CURRENT_DATE)
   ```

   The text now appears as follows:



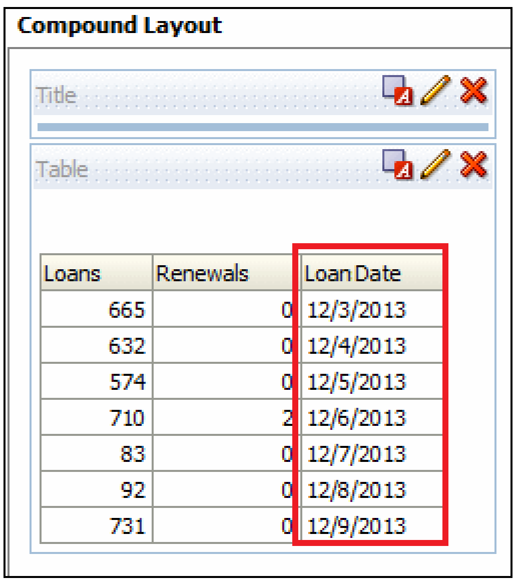
Advanced SQL Filter

5. Select **OK**. The filter appears as follows:



Filters

6. Select the **Results** tab to view the report. The report includes results from Dec. 03, 2013:



Compound Layout

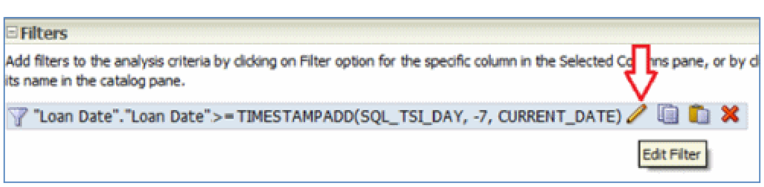
Example 2 – The Current Month

The report displays any items loaned in the current month.

To displays any items loaned in the current month:

1. Select the Edit icon

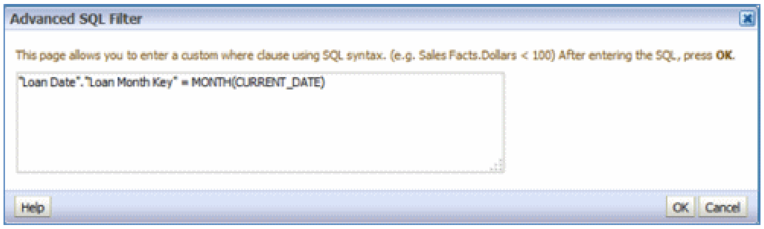
in the filter pane of example #1.



Edit Filter

2. Change the text to:

```
Loan Date"."Loan Month Key" = MONTH(CURRENT_DATE)
```



Advanced SQL Filter

Note

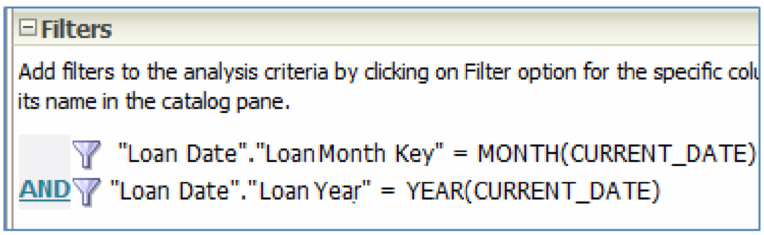
The retrieval is by “Loan Date”.Loan Month Key” and not “Loan Date”.”Loan Date”.

---

3. This syntax includes all dates in December for every year. Add additional retrieval for the current year using the loan year:

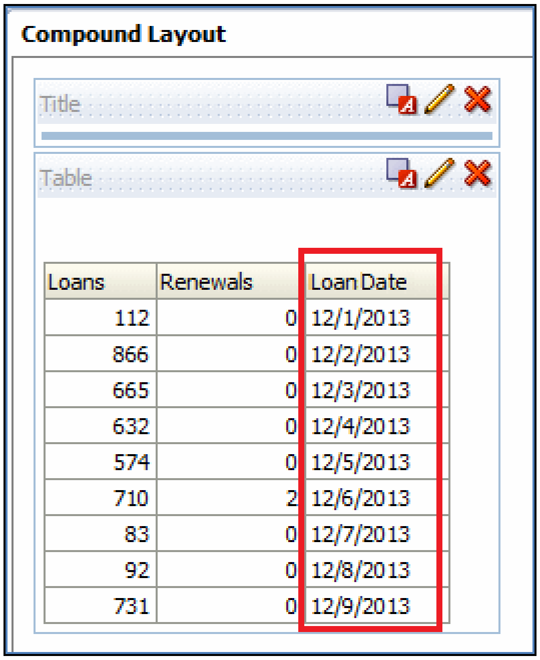
```
"Loan Date"."Loan Year" = YEAR(CURRENT_DATE)
```

The filter appears as follows:



Filters

The report now includes results from the current month (December) and the current year (2013):



Loans	Renewals	Loan Date
112	0	12/1/2013
866	0	12/2/2013
665	0	12/3/2013
632	0	12/4/2013
574	0	12/5/2013
710	2	12/6/2013
83	0	12/7/2013
92	0	12/8/2013
731	0	12/9/2013

Compound Layout

Example 3 – The Current Year

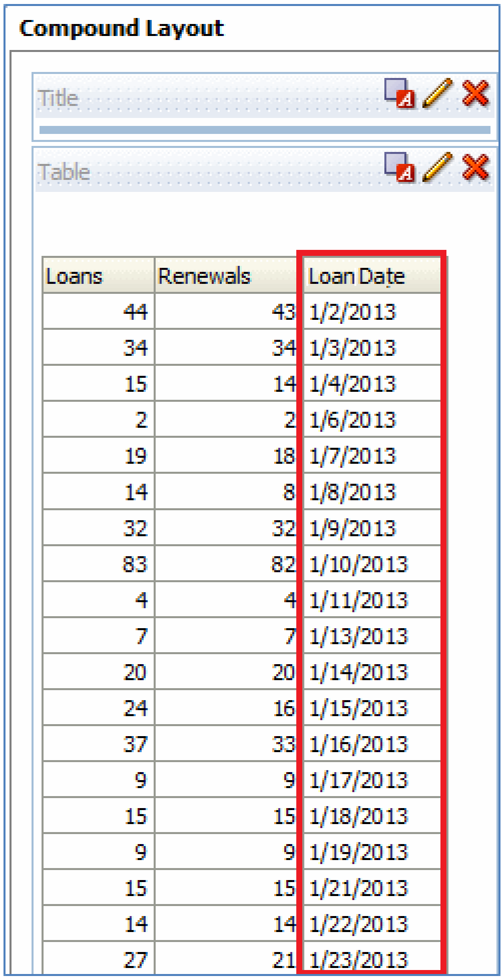
The report displays results from the current year (for example, 2013).

To display results from the current year:

1. Change the SQL filter from the previous example to the following:

```
"Loan Date"." Loan Year" = YEAR(CURRENT_DATE)
```

2. Select the **Results** tab to display the report:



Loans	Renewals	Loan Date
44	43	1/2/2013
34	34	1/3/2013
15	14	1/4/2013
2	2	1/6/2013
19	18	1/7/2013
14	8	1/8/2013
32	32	1/9/2013
83	82	1/10/2013
4	4	1/11/2013
7	7	1/13/2013
20	20	1/14/2013
24	16	1/15/2013
37	33	1/16/2013
9	9	1/17/2013
15	15	1/18/2013
9	9	1/19/2013
15	15	1/21/2013
14	14	1/22/2013
27	21	1/23/2013

Compound Layout

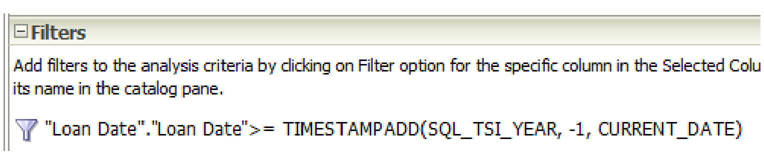
Example 4 – The Last Year

The report displays results from the last year (the last 365 days).

1. Change the SQL filter from the previous example to the following:

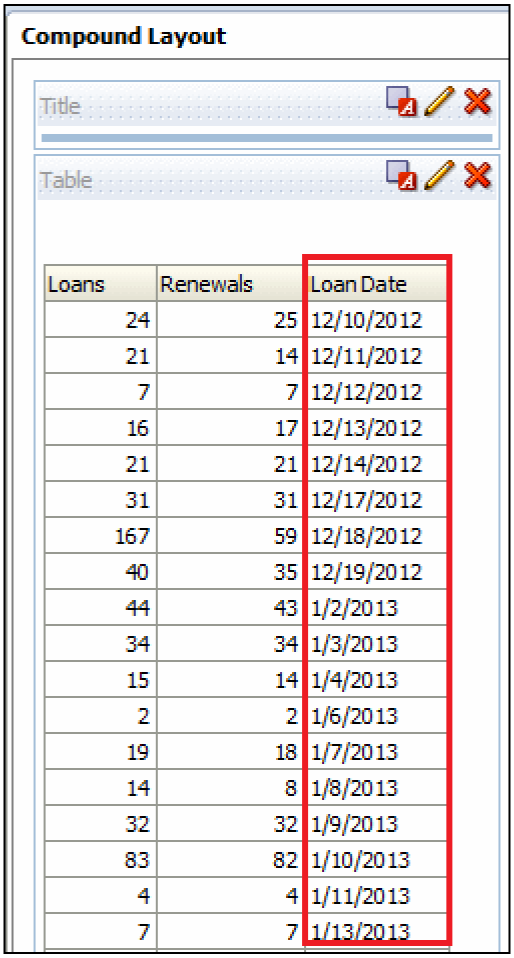
```
"Loan Date"."Loan Date" >= TIMESTAMPADD(SQL_TSI_YEAR, -1, CURRENT_DATE)
```

The filter appears as follows:



Filters

2. Select the **Results** tab to view the report:



Loans	Renewals	Loan Date
24	25	12/10/2012
21	14	12/11/2012
7	7	12/12/2012
16	17	12/13/2012
21	21	12/14/2012
31	31	12/17/2012
167	59	12/18/2012
40	35	12/19/2012
44	43	1/2/2013
34	34	1/3/2013
15	14	1/4/2013
2	2	1/6/2013
19	18	1/7/2013
14	8	1/8/2013
32	32	1/9/2013
83	82	1/10/2013
4	4	1/11/2013
7	7	1/13/2013

Compound Layout

Items Returned 30 Days or More After Their Due Date

Use the **Loan > Return Due Days** field of the Fulfillment subject area to create this report. This field displays the difference between the due date and the return date. If it is a positive number, the book was returned after the due date. If it is a negative number, the item was returned before the due date.

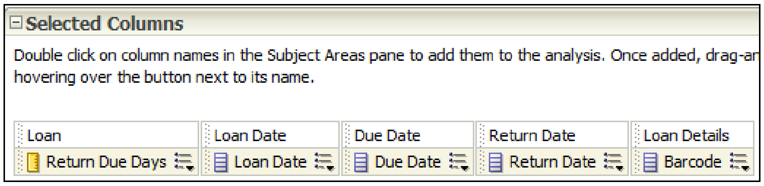
Note

You can also use the out-of-the-box report *Ex Libris - Items returned 30 or more days after due date (Late Returns)* located under shared/Community/Reports/Shared Reports/Reports/Fulfillment - Misc. reports.

To create this analytics report:

1. From the Analytics dashboard, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Select the following columns:
   - Loan > Return Due Days
   - Loan Date > Loan Date
   - Due Date > Due Date
   - Return Date > Return Date

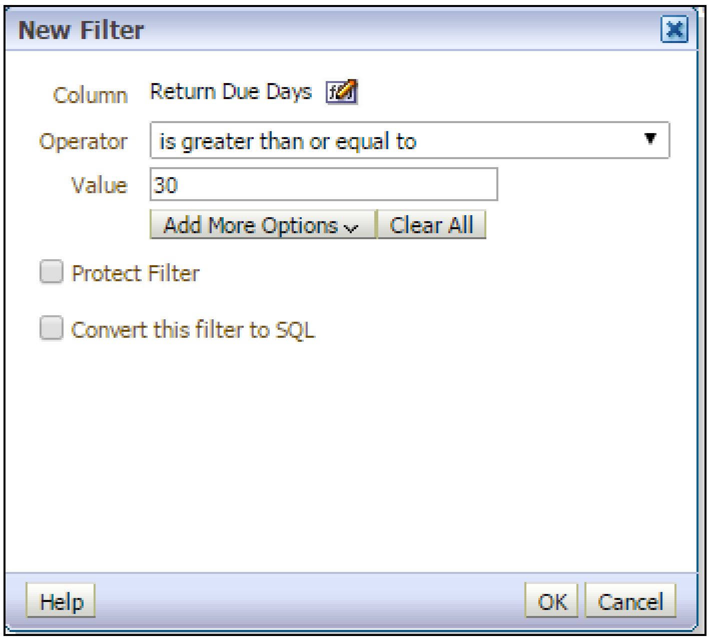
- Loan Details > Barcode



Return Due Days

3. From the Return Due Days field, select the More Options icon

and select **Filter**.



Return Due Days Filter

4. From the **Operator** drop-down list, select **is greater than or equal to**.
5. In the **Value** field, enter 30.
6. Select **OK**.
7. Select the **Results** tab.

   A report appears with the items returned 30 days or more after their due date:

Return Due Days	Loan Date	Due Date	Return Date	Barcode
31	5/12/2011	8/9/2014	9/9/2014	31864000008369
44	8/19/2011	8/9/2014	9/23/2014	31864000332652
63			10/12/2014	31863002481681
63				31863005803154
63				31863006154573
63				31863006863215
63				31863008082632
63				31864000312720
63				31864000530982
44	8/29/2011	8/9/2014	9/23/2014	31863005082627
63			10/12/2014	31863007824109
63				31863008201612
248	10/10/2011	1/27/2014	10/2/2014	31863005757392
444	12/9/2011	5/14/2013	8/1/2014	31863007265121
444				31863007288149
444				31863007560034
61	1/4/2012	5/12/2014	7/11/2014	31863002079832
61				31863004318923
61				31863004373001
61				31863006242550
61				31863008088852
61				31863008168084
421	1/20/2012	5/14/2013	7/9/2014	31863006634905
444			8/1/2014	31863006054153

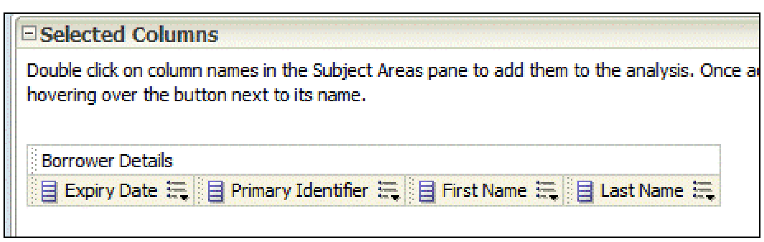
Return Due Days Report

Patrons with Expiration Dates Within One Week Who Have Active Loans

You can create a report that shows patrons with an expiration date within one week of the present who have active loans.

To create this analytics report:

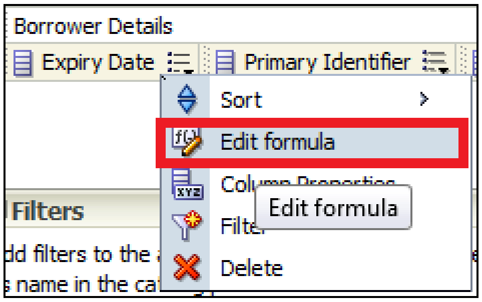
1. From the Analytics dashboard, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Select the following columns:
   - Borrower Details > Expiry Date
   - Borrower Details > Primary Identifier
   - Borrower Details > First Name
   - Borrower Details > Last Name



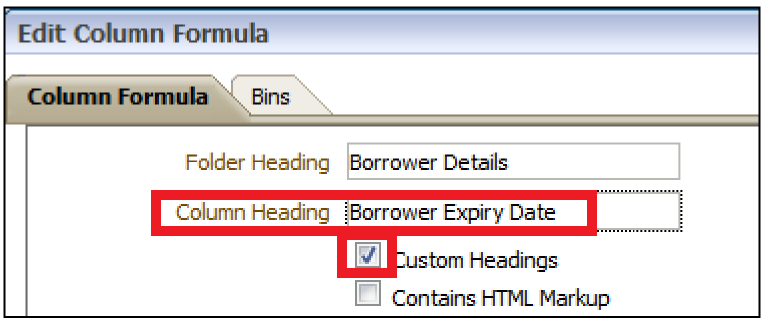
Selected Columns

3. To make the heading clearer, rename Expiry Date to Borrower Expiry Date.
   1. Select the More Options icon

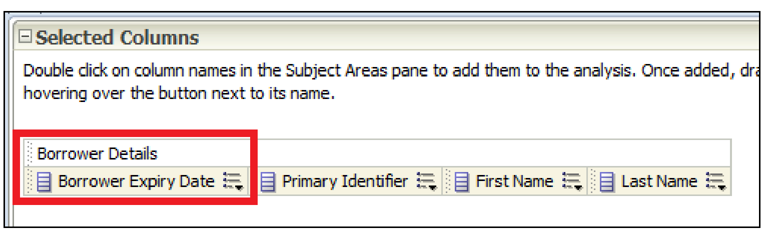
next to Expiry Date and select **Edit Formula**.



2. Select the **Custom Headings** check box and enter `Borrower Expiry Date` in the **Column Heading** field.



3. Select **OK**.



Borrower Expiry Date

4. Create an SQL TIMESTAMPADD filter on **Borrower Details.Expiry Date** using TIMESTAMPADD.
   1. From the Borrower Details field, select the More Options icon

      and select **Filter**.
   2. Select **Convert this filter to SQL**.
   3. Select **OK**.
   4. Change the text to:

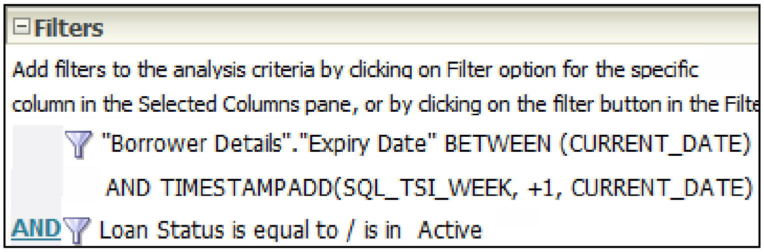
```
"Borrower Details"."Expiry Date" BETWEEN (CURRENT_DATE) AND
TIMESTAMPADD(SQL_TSI_WEEK, +1, CURRENT_DATE)
```

   5. Select **OK**.
5. Select the Filter icon

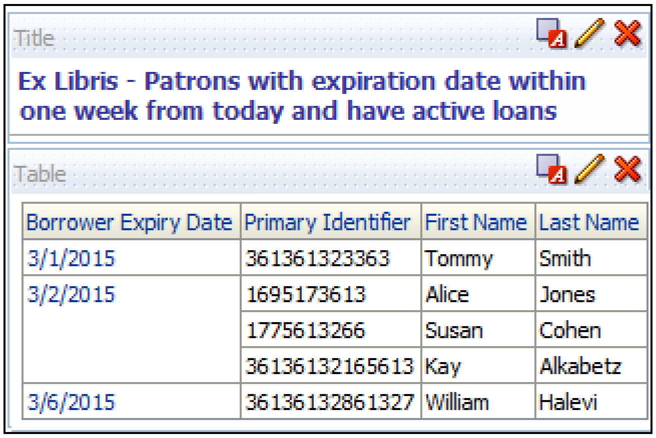
   and select **More Columns...**.
6. Select **Loan Details > Loan Status** and select **OK**.

7. Set the **Operator** to `is equal to/is in` and the **Value** to `Active`.



Filter

The following is an example report:



Borrower Expiry Date	Primary Identifier	First Name	Last Name
3/1/2015	361361323363	Tommy	Smith
3/2/2015	1695173613	Alice	Jones
	1775613266	Susan	Cohen
	36136132165613	Kay	Alkabetz
3/6/2015	36136132861327	William	Halevi

Report

8. To improve readability, have the Borrower Expiry Date appear on each row:
   1. Select the Edit icon

      .
   2. Select the Table Content Properties icon

      .
   3. Under Row Styling, select **Enable alternate styling** and **Repeat Cell Values**.

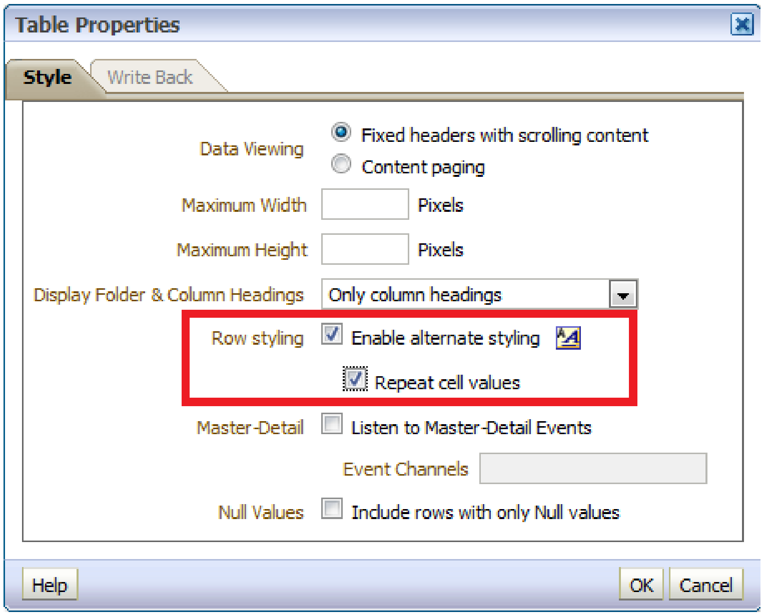
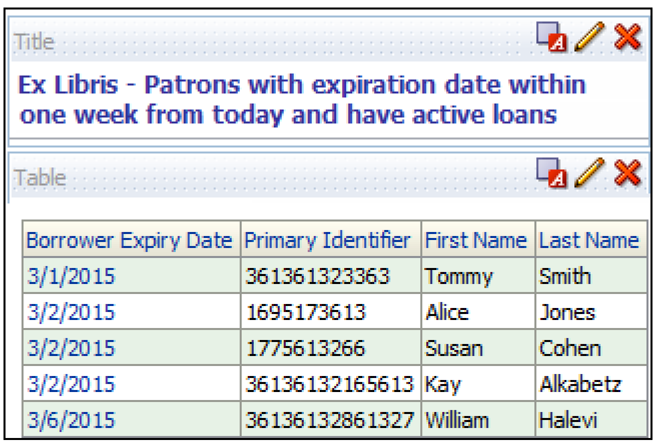


Table Properties

9. Select **OK**.

   The report appears with the Borrower Expiry Date on each row:



Borrower Expiry Date	Primary Identifier	First Name	Last Name
3/1/2015	361361323363	Tommy	Smith
3/2/2015	1695173613	Alice	Jones
3/2/2015	1775613266	Susan	Cohen
3/2/2015	36136132165613	Kay	Alkabetz
3/6/2015	36136132861327	William	Halevi

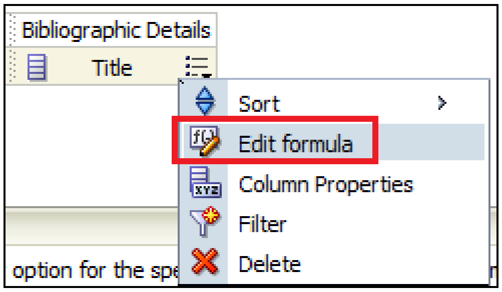
Report with Borrower Expiry Date on Each Row

Case-Insensitive Filtering

You may want to filter a report by title starting with both an uppercase and a lowercase letter. One way to do this is to create two separate filters - one for uppercase and one for lowercase. This section describes how one filter can be created to achieve this.

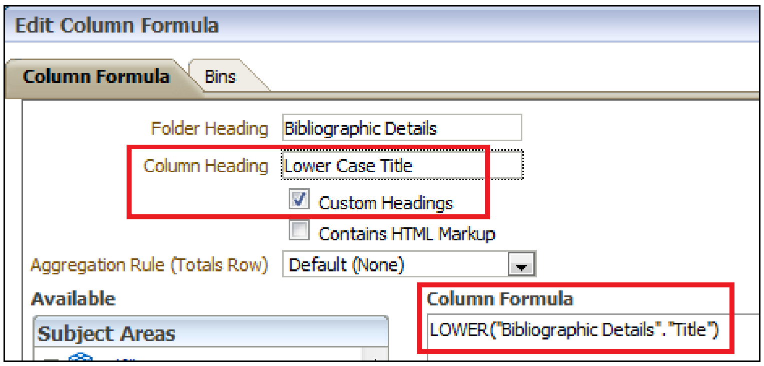
To filter by a string for both uppercase and lowercase with one filter:

1. Select **Edit Formula** for the field you want to filter, for example, **Title**.



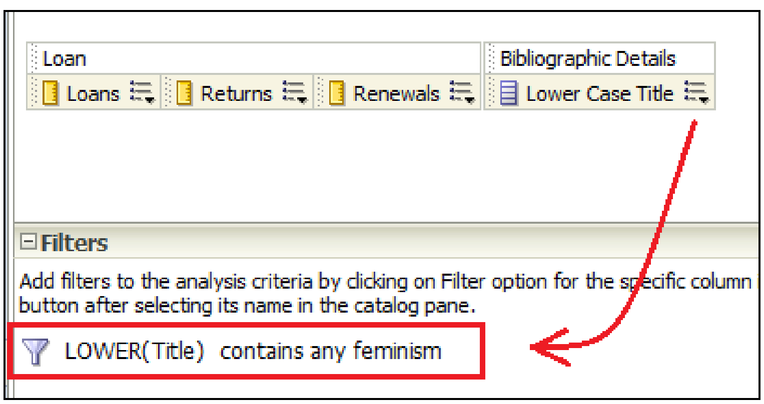
Edit Formula

2. Change the column Heading to **Lower Case Title**.
3. In the **Column Formula** field, add **Lower** to the formula.



Lowercase Title

4. Filter by **feminism** (with a lowercase f), for example, on Lower Case Title. The report displays records whose title has either Feminism or feminism.



Filter for Feminism

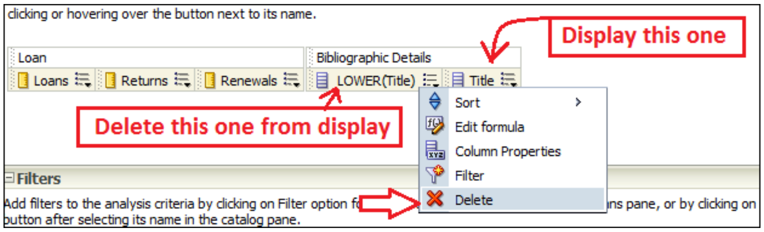
The following is an example of a report. However, all of the titles are in lowercase.

1	1	0	encyclopedia of feminism /
2	2	3	english feminism, 1780-1980 /
2	2	1	european feminisms, 1700-1950 : a political history /
2	2	1	everyone was brave : the rise and fall of feminism in america /
1	1	0	faces of feminism : a study of feminism as a social movement /
3	3	0	faces of feminism : an activist's reflections on the women's movement /
2	2	0	feminism /
1	1	0	feminism : from pressure to politics /
2	2	1	feminism : the essential historical writings /
1	1	0	feminism after bourdieu /
1	1	0	feminism and anthropology /

Lowercase Report

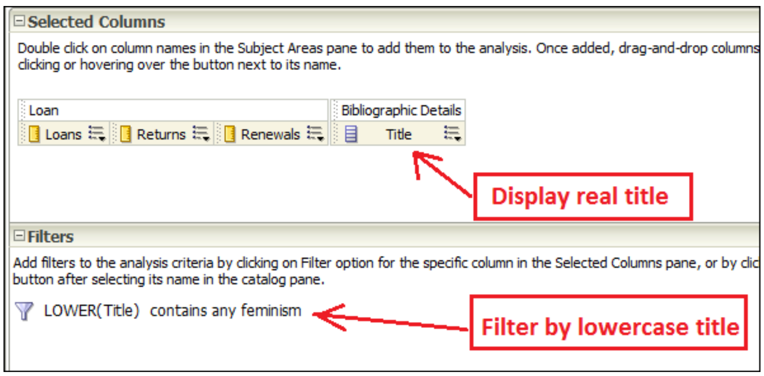
You want to display the real title and filter by the lowercase title.

5. Add the real title to the report, and delete Lower Case Title from the display, but leave it in the filter.



Delete from Display

The criteria now look like the following:



Criteria

The following is the report displaying results in both uppercase and lowercase.

2	2	1	Everyone was brave : the rise and fall of feminism in America /
1	1	0	Faces of feminism : a study of feminism as a social movement /
3	3	0	Faces of feminism : an activist's reflections on the women's movement /
2	2	0	Feminism /
1	1	0	Feminism : from pressure to politics /
2	2	1	Feminism : the essential historical writings /
1	1	0	Feminism after Bourdieu /
1	1	0	Feminism and anthropology /
1	1	0	Feminism and art history : questioning the litany /
2	2	0	Feminism and masculinities /
1	1	0	Feminism and methodology : social science issues /
1	1	0	Feminism and philosophy : essential readings in theory, reinterpretation

Uppercase and Lowercase Report

Column-Specific Filtering

For information on using multiple filters for each column in an Analytics report, see [Analytics - How to use multiple filters per column in an analytics report].

Filter by List of MMS IDs

For information on using values from a CSV file to filter a report, see [How to Use a List of Values from a CSV File as a

Filter in Alma Analytics.