

Acquisitions

What report options are available related to acquisitions?

Acquisition data in Alma Analytics covers data from vendors, transactions, funds, purchase types, bibliographic data and more. Alma's reporting function, Analytics, provides actionable information regarding usage information, budget usage trends and up-to-date expenses overviews. This complements our planned suite of collection development utilities to support selection and evaluation.

The utilities will include overlap analysis and usage statistics and cost/usage analysis data which will be presented to relevant staff during the evaluation process based on information provided by the vendors.

The system also shows the allocations, the encumbrances (pending, actual and total), the expenditures (pending, actual and total) and the available balance for each fund. This information is updated and displayed in real-time within Alma, and available for use in analytical reports.

Alma Analytics allows for reports generated by the solution to be embedded as widgets in the Alma Dashboard or in relevant sections of the system. The solution also comes with an intuitive user interface enabling staff users to create and run customized reports.

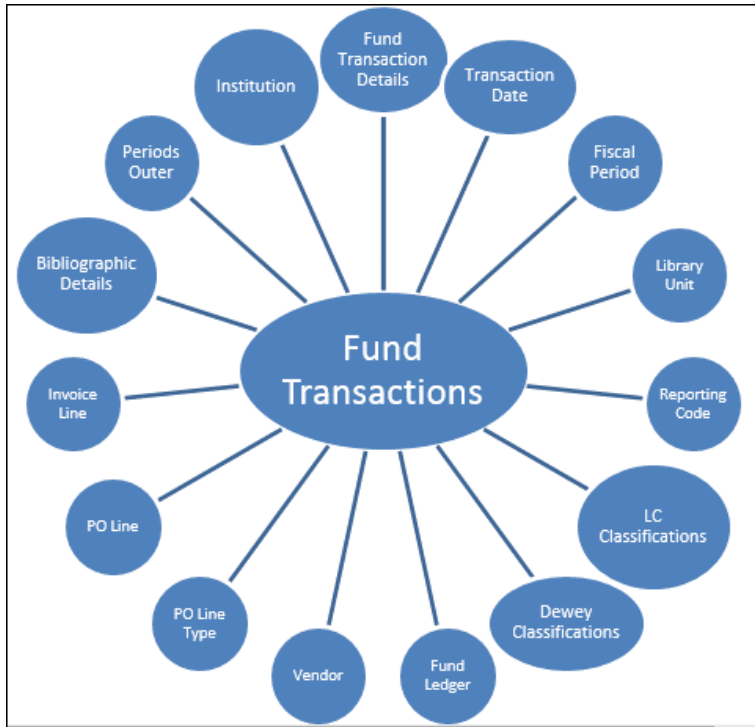
As an example, Alma keeps this data indefinitely so the reports are always up to date, and can also be used to compare the spend and cost of previous years to the current year. Here is an example of a report detailing cost per use of electronic and print items.

Cost Per Use - Print Items				Cost Per Use - E-Resources			
Title	Price	# Loans	Price per Loan	Title	Cost	Usage	Cost per Use
Gerontological nursing /	5.00	72	0.07	Acta mathematica Hungarica	157	156-64000	
The Ultimate Harry Potter and Philosophy	5.50	60	0.09	Advertising age	37	1,140	0.03214
Algebraic and Combinatorics /	23.00	30	0.46	Chicago Tribune	217	328	0.43866
Paterson nursing program 2012.	5.00	36	0.14	Crain's New York business	12	2,120	0.00553
Mexico's revolutionary aztec gardens : from Estelidzeno to 130/30 /	5.00	32	0.16	Differential equations	36	3,000	0.01194
Nursing : the career of a lifetime	300.00	24	12.50	Genetics	297	963	0.30742
Medical surgical nursing : an integrated approach /	5.00	26	0.20	Harvard business review	203	2,669	0.08132
Business in the cloud : what every business needs to know about cloud computing	6.98	16	0.44	International journal of nursing studies	123	1,523	0.08033
Modeling brothers : the revolutionary generation /	5.75	16	0.36	Journal of comparative phonetics	127	3,000	0.04231
Laboratory and diagnostic tests with nursing implications /	5.00	16	0.31	Journal of the American Chemical Society	210	3,075	0.06840
	2.14	13	0.16	Plasma physics reports	49	1,700	0.02794

What reports can be created related to acquisitions and fund expenditure?

Using the Funds Expenditure subject area, the Design Analytics user may create reports and dashboards that help to answer the following types of business questions:

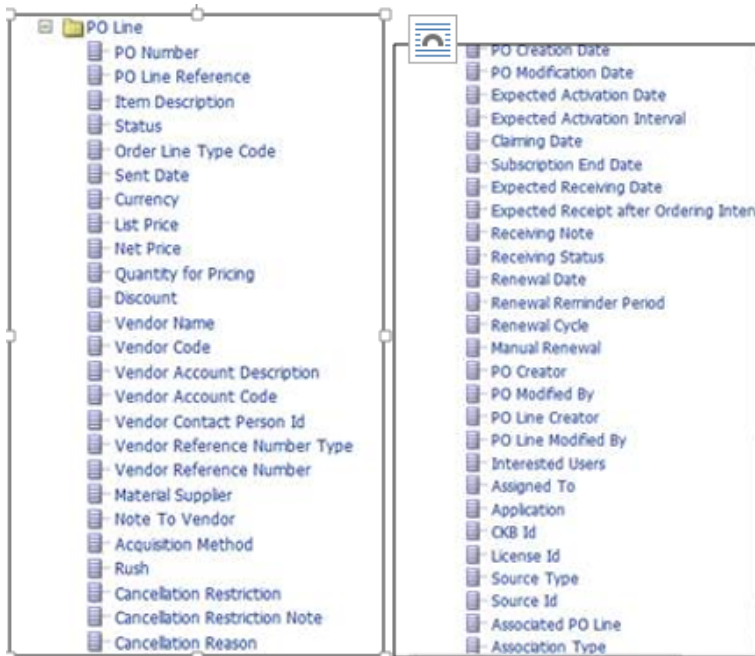
- How much was expended last year per month?
- What is the comparison of encumbrances versus expenditures versus allocations?
- How much was expended per item material type or per item type?
- What is the share of E/P expenditures out of the total expenditures?
- How much was paid per vendor?
- How much was expended per reporting code?
- How much was expended per fund, ledger, or library out of the allocations?
- How much was expended per library?



Alma Analytics is based on a data warehouse created from the online transaction databases and does not run any queries directly on the operational system. This means that there is no interference with the operations of the system. Data is refreshed on a daily basis from the operational data into Alma Analytics.

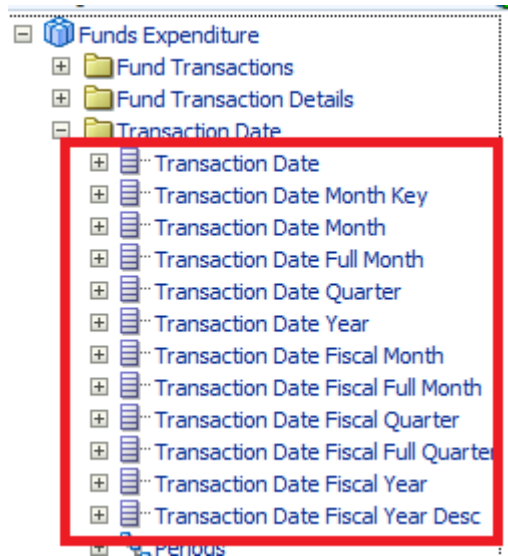
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Each of the elements include detailed fields for analysis.

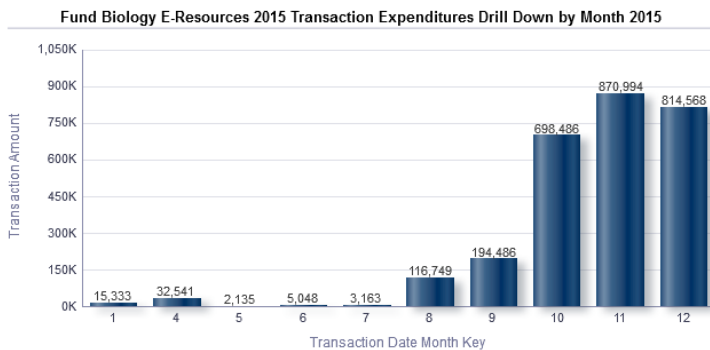


Can reports drill down fund expenditure by month?

Reports can drill down to expenditure by month. In the "Funds Expenditure" subject area "Transaction date" folder there is a wide variety of date periods which can be used for displaying and filtering:



An example of a graph showing the monthly expenditures of "Fund Biology E-Resources" for 2015.



The same data in table format:

Transaction Date Month Key	Transaction Amount
1	15,333
4	32,541
5	2,135
6	5,048
7	3,163
8	116,749
9	194,486
10	698,486
11	870,994
12	814,568

Does Alma provide the ability to show year-to-date details for all funds?

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more. Each of the elements include detailed fields for analysis. Analytics allows to create reports based on date, month, quarter and year.

The following example shows a report output of expenditure by ledger and fund:

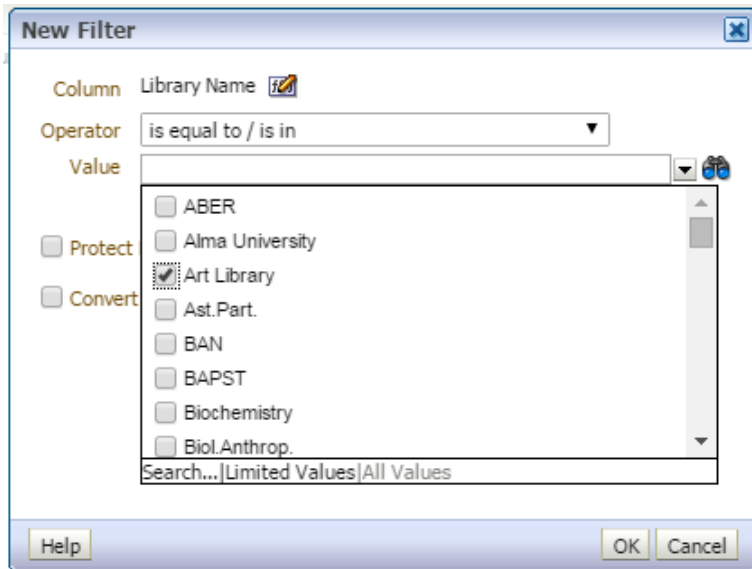
	2013		
Fund Ledger Hierarchy	Encumbrance	Expenditure	Remaining Allocation
[-] Art and Design	0	12,013	244,187
[-] Architecture	0	11,973	44,727
[-] Design			73,500
[-] Fine Arts	0	40	57,710
[-] Multimedia			68,250
[-] Arts	0	164	285,961
[-] Business and Economics	95	6,627	230,090
[-] Education	129	14	39,757
[-] Engineering	0	12,591	435,759
[-] Information Technology	354	6,221	201,300
[-] Law			105,000
[-] Medicine	0	628	326,972
[-] Pharmacy and Pharmaceutical Sciences			63,000
[-] Science	0	18,258	268,392
[-] Social Science	0	1,147	208,958
[-] Training			494

Does Alma provide the ability to report on funds according to each purchasing location?

The Funds expenditure section in Alma Analytics provides a set of categories:

- [-]  Funds Expenditure
 - [-]  Fund Transactions
 - [-]  Fund Transaction Details
 - [-]  Transaction Date
 - [-]  Fiscal Period
 - [-]  Library Unit
 - [-]  Reporting Code
 - [-]  LC Classifications
 - [-]  Dewey Classifications
 - [-]  Fund Ledger
 - [-]  Vendor
 - [-]  PO Line Type
 - [-]  PO Line
 - [-]  Invoice Line
 - [-]  Bibliographic Details
 - [-]  Periods Outer
 - [-]  Institution
- [-]  Library Unit
 - [-]  Library Description
 - [-]  Library Code
 - [-]  Library Name
 - [-]  Unit Type

To narrow the results to a specific location the results can be filtered:



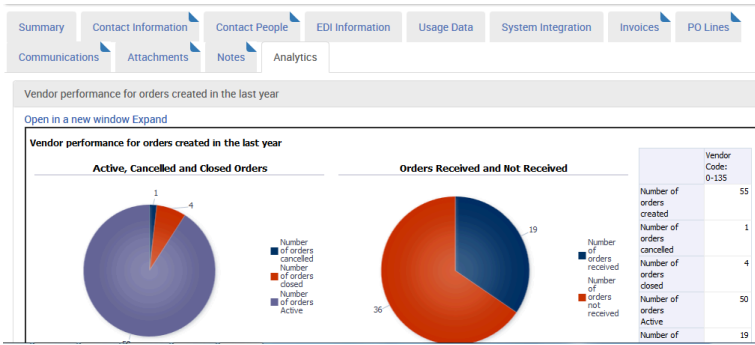
Can vendor performance reports be generated?

It is possible to create custom reports making use of Acquisitions data to compare time to arrival for orders in Alma. This report uses `TIMESTAMPDIFF` to get the amount of days (difference) between time of ordering an item and time of arrival of an item. The `TIMESTAMPDIFF` is inside the "Edit Formula". This is useful to see which vendors have the fastest response time.

Ex Libris - Time to arrival for acquisitions orders

Vendor Name	Barcode	Days to arrive
A D & L Vendors	AU9801	230
	AU9802	0
AIP - The American Institute of Physics	AU12501	192
Assoc. Françaises	AU24603	0
Blackwells	000237799800000121	662
	1111	1,152
	AU24608	972
	AU24613	610
	AU36649	972
	Alma-1	506
Boardman	AS-888	850
	AS-897	850
	AU10301	211
	AU24612	664
	dd222	245
Chadwyck	AU12001	194
	AU27003	250
	AU29903	0
Ebook Library	AU6801	288
	AU6802	288
Ebsco	AU34108	-212
	AU34403	-212
	AU34404	-212

In addition, the Analytics tab on the vendor record will display data related to vendor performance that is generated from Alma Analytics and is embedded in the vendor record:



Can reports be generated combining several acquisition areas?

The Licenses, E-Inventory, and Fund Expenditure subject areas were enhanced to allow the creation of joint reports using fields from the Licenses and E-Inventory subject areas, and the Licenses and Fund Expenditure subject areas.

Total views:

2574