

Common Analytics Procedures

Note

For a list of How To Analytics documents, see [Presentations and Documents - Analytics](#).

This section contains a cookbook of procedures that illustrate of how to use Analytics.

Formatting Procedures

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:

Fine Fee Status	User Name	First Name	Last Name	Fine Fee Transaction Modification Date	Original Amount
Closed				7/12/2013 4:23:07 PM	33
Closed				10/4/2013 1:23:55 PM	29
Closed				7/1/2013 8:55:24 AM	0
					25

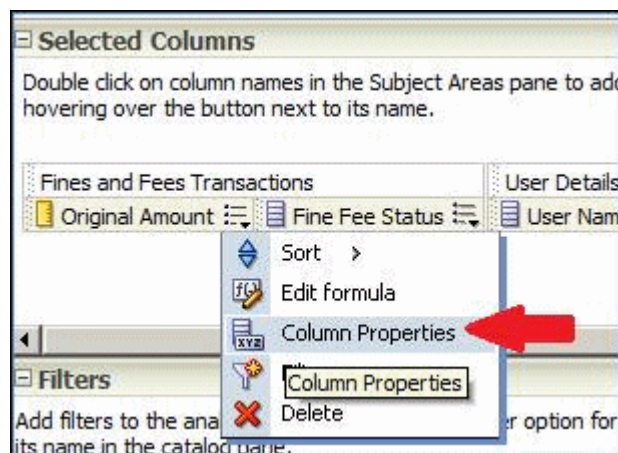
Sums Rounded Up

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

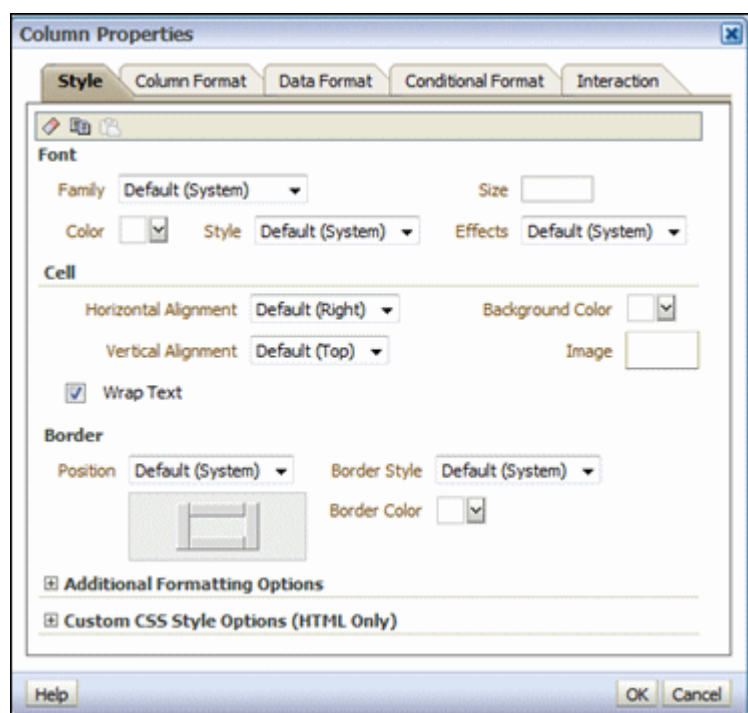


and select **Column Properties** from the drop-down list.



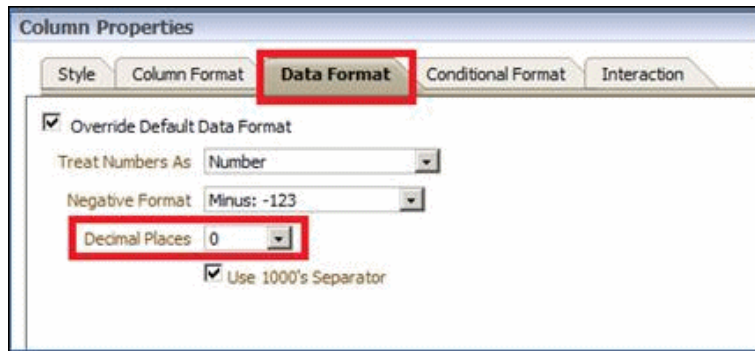
Column Properties Option

The Column Properties dialog box appears.



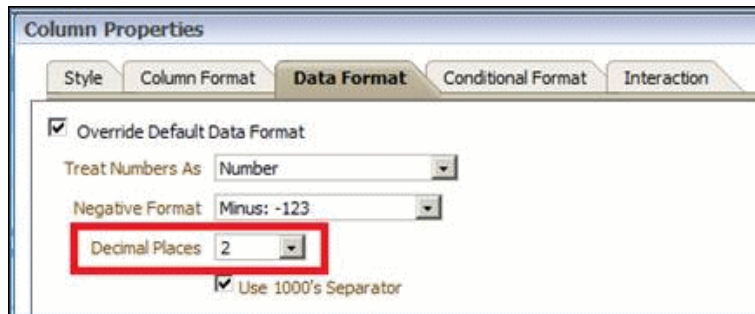
Column Properties Dialog Box

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:

Title					
Fines and Fees Report 20131011					
Pivot Table					
Fine Fee Status	User Name	First Name	Last Name	Fine Fee Transaction Modification Date	Original Amount
Closed				7/12/2013 4:23:07 PM	32.50
				10/4/2013 1:23:55 PM	28.50
					0.00
				7/1/2013 8:55:24 AM	25.00

Sums Not Rounded Up

Currency Symbols

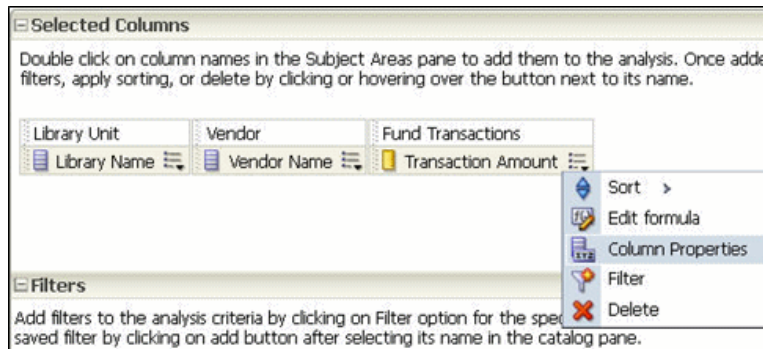
To add currency symbols to numbers:

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

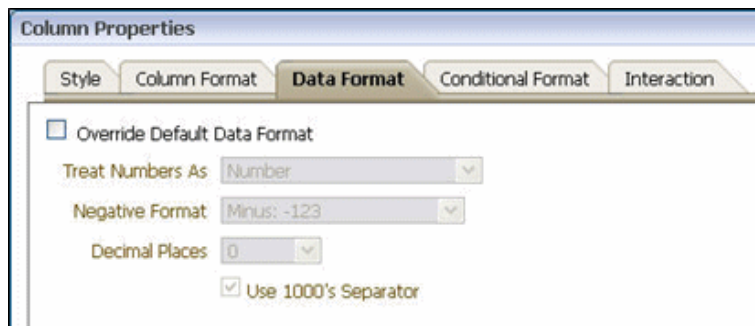


for Transaction Amount and select **Column Properties** from the drop-down list.



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
Main Library	Yankee Book Peddler	£5,192.61
	AAAS	£2,032.50
	ARTstor, Inc.	£52.00
	Antonio's Casa de Libri	£44.45
	B&TG	£28.00
	BAKER & TAYLOR	£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 .A1M127 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

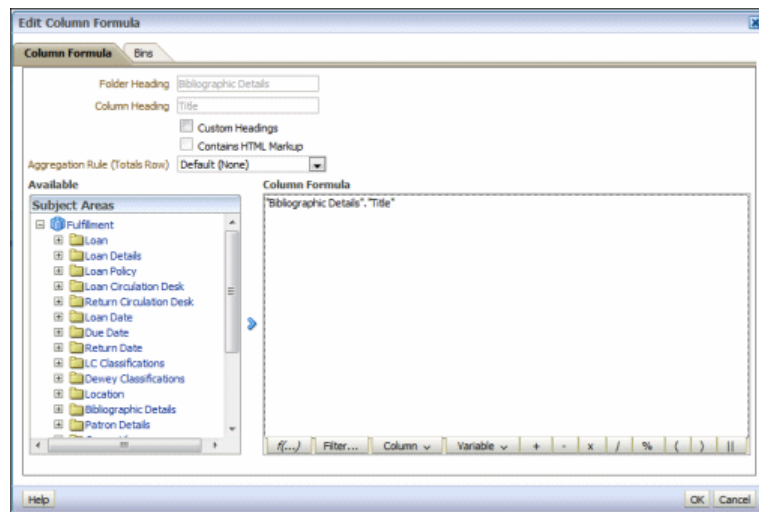
1. From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns, for example:
 - Bibliographic Details > Title
 - Physical Item Details > Creation Date
 - Physical Item Details > Material Type
 - Loan Details > Call Number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

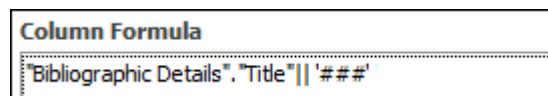


and select **Edit Formula**. The Edit Column Formula page is displayed:



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 Burnsville Mill": an oral history /###	8/12/2013	Book	ML421 .L485 B68 2003	Complete
"With his pistol in his hand," a border balled 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 Properties

Style **Column Format** Data Format Conditional Format Interaction

Headings ☐ Hide

Folder Heading Bibliographic Details

Column Heading Title || '###'

☒ Custom Headings

☐ Contains HTML Markup

Value Suppression

XX	XXXX	XX	XXXX
	XXXX	XX	XXXX
XX	XXXX	XX	XXXX
	XXXX	XX	XXXX

☒ Suppress ☐ Repeat

Help OK Cancel

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 .J35 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	ML42 L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.###	8/12/2013	Book	PQ7297 .A1 C63	Active

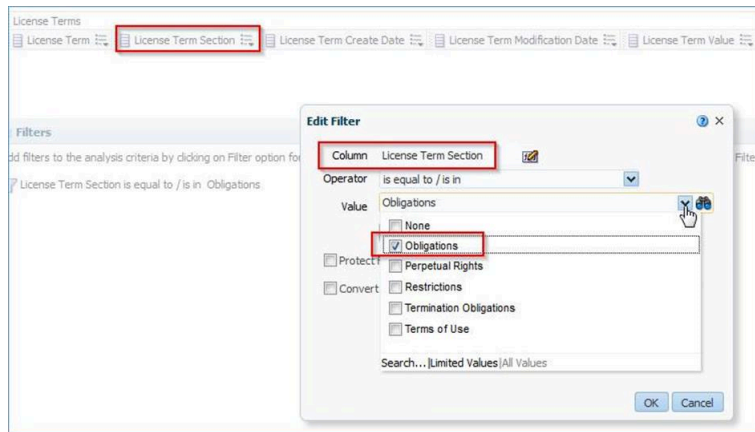
Report

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

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

License Name	License Term Section	License Term Create Date	License Term Modification Date	License Term Value
ACLS History E-Book Project NERL License	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.



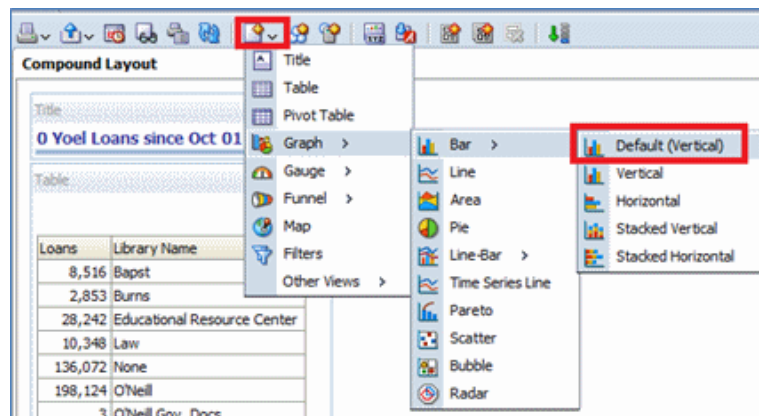
Values on Top of Each Bar

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

- From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
- Create a report with the following columns, for example:
 - Loan > Loans
 - Location > Library Name
- Select the My View icon



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



Default Bar Graph

- From the Results tab, select the Edit icon



to edit the graph:

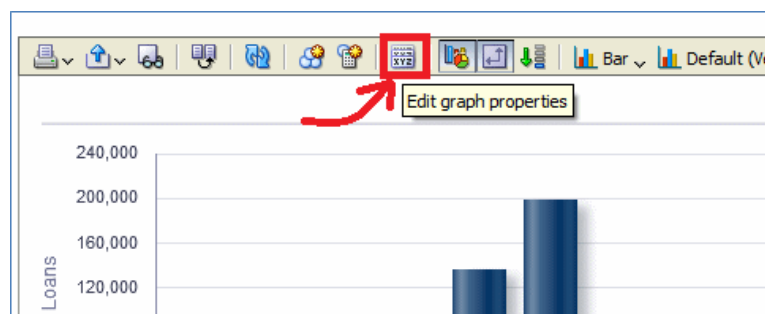


Pencil Icon

- Select the Edit Graph Properties icon

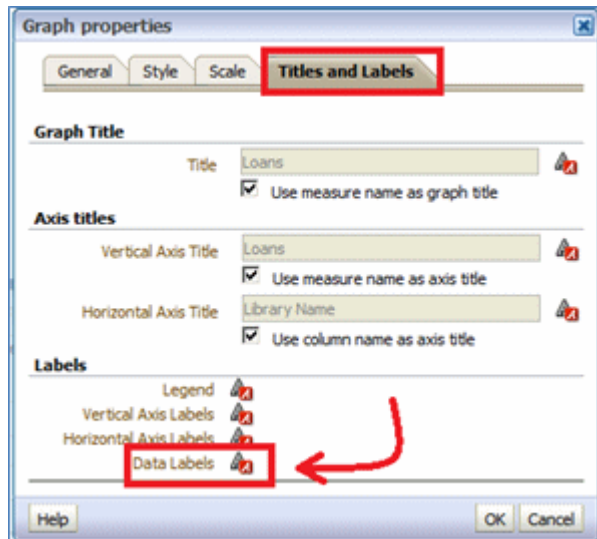


:



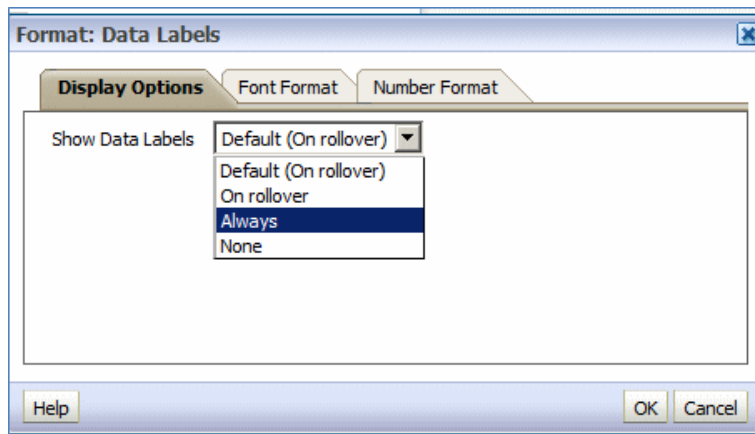
Edit Graph Properties

- From the Titles and Labels tab, select **Data Labels**:



Titles and Labels

- 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

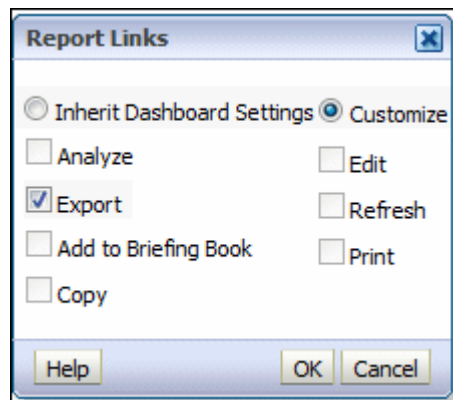


in the top-right of the page of the dashboard and select **Edit Dashboard**. The dashboard moves to edit mode.

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:



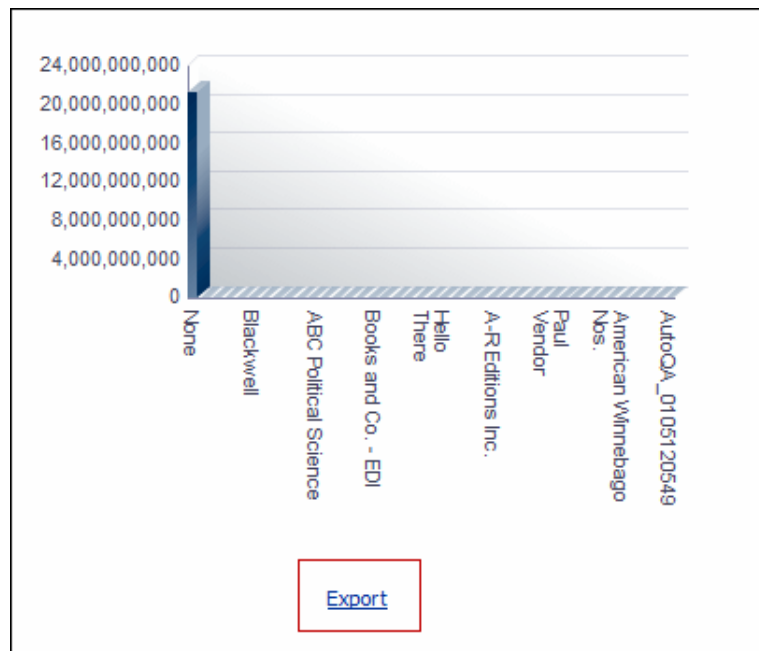
Report Links

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:

Library Code	Location Code	Loan Year	Loan Full Month	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
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

Loan Year and Loan Full Month Desc Columns

- 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.

Library Code	Location Code	Loan Year	Loan Full Month	Loans
BAPST	ART	2013	Apr 13	558
			Aug 13	151
			Feb 13	305
			Jan 13	293
			Jul 13	199

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:

Location	Loan Date
Library Code	Loan Year
Location Code	

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

Double click on column names in the Subject Areas pane to add them to the analysis. Over the button next to its name.

Location	Loan	Loan Date
Library Name	Loans	Loan Days

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column. Its name in the catalog pane.

Loan Date is greater than or equal to 01/01/2013
 AND Library Name is equal to / is in Main Library

Selected Columns

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

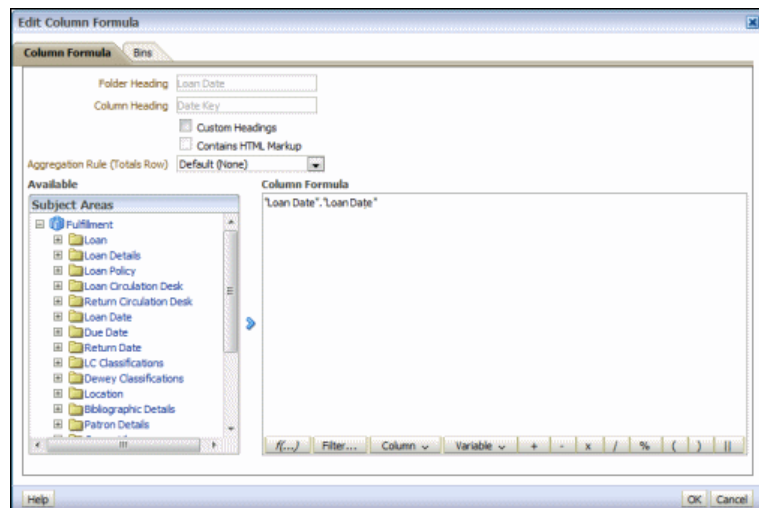
Library Name	Loans	Loan Days	Loan Date
Main Library	23	95	1/2/2013
	36	239	1/3/2013
	37	255	1/4/2013
	24	173	1/5/2013
	8	23	1/6/2013
	31	383	1/7/2013
	32	328	1/8/2013
	46	481	1/9/2013
	20	146	1/10/2013
	45	233	1/11/2013
	41	178	1/13/2013
	104	722	1/14/2013
	94	582	1/15/2013
	94	447	1/16/2013
	106	769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

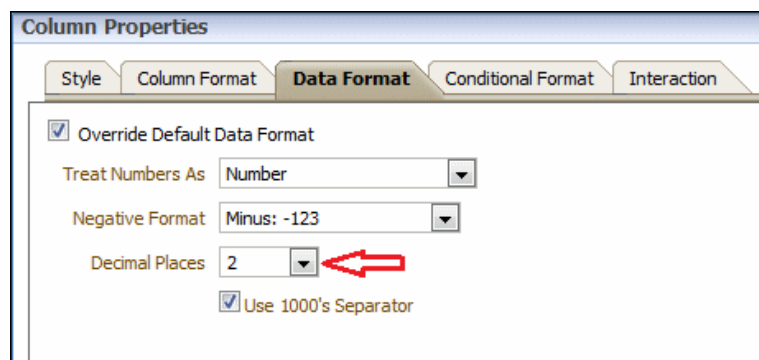


of the new column and select **Column Properties > Column Format** and enter a new name for the column in the Column Heading field.

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

Double click on column names in the Subject Areas pane to add them to the analysis.

PO Line

Physical Item Details

Bibliographic Details

PO Line

Sent Date

Receiving Date

Title

Vendor Account Description

Selected Columns

- From Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
- 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:

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

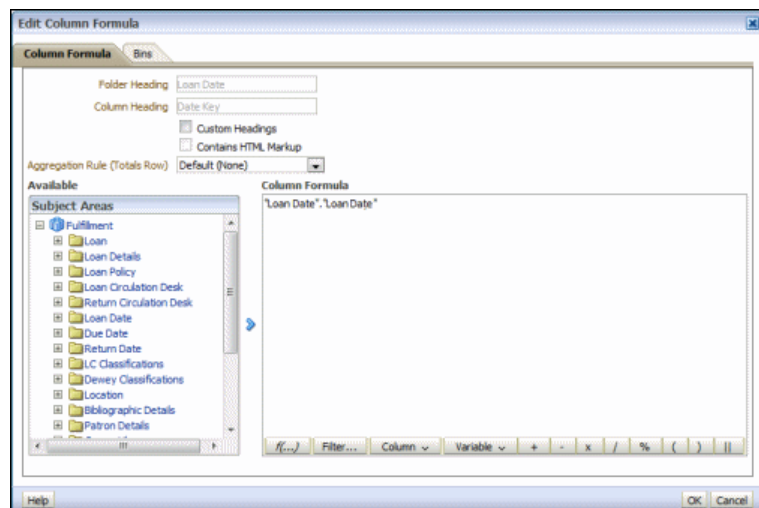
Sent Date	Receiving Date	Vendor Account Description	Title
1/4/2012	7/22/2013 8:47:13 AM	AutQA Vendor Account description	Ireland
	8/21/2013 8:52:01 AM	AutQA Vendor Account description	Ireland
	9/20/2013 7:52:27 AM	AutQA Vendor Account description	Ireland
	2/12/2014 5:47:26 PM	AutQA Vendor Account description	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

- Select the **Criteria** tab and add a new column of any kind.
- 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

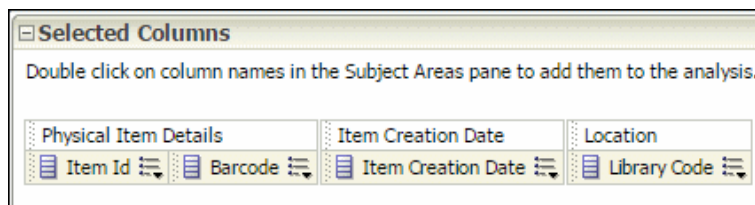
in two separate columns and you want to have library code, space, dash, space, and then item ID in one column. This section describes one way of doing this.

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.

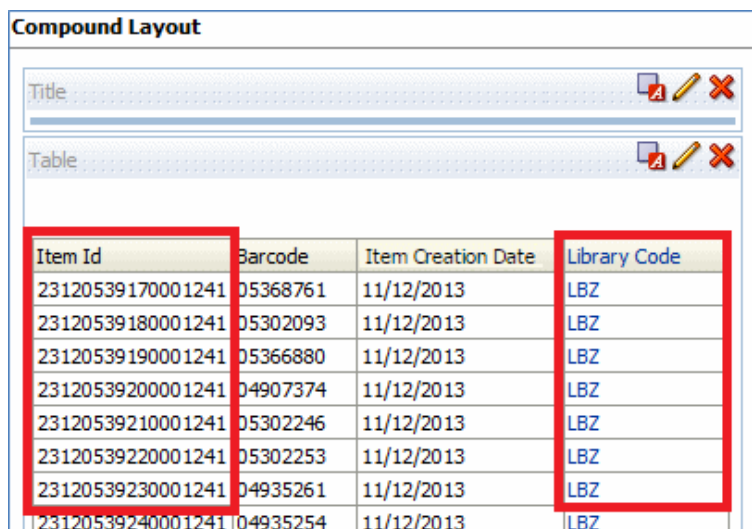
To concatenate two or more fields in an Analytics report:

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:



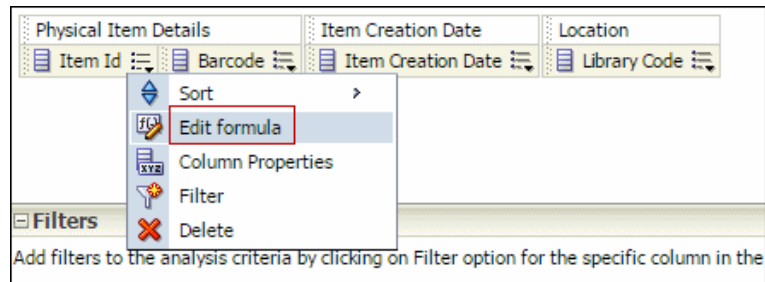
Item Id	Barcode	Item Creation Date	Library Code
23120539170001241	05368761	11/12/2013	LBZ
23120539180001241	05302093	11/12/2013	LBZ
23120539190001241	05366880	11/12/2013	LBZ
23120539200001241	04907374	11/12/2013	LBZ
23120539210001241	05302246	11/12/2013	LBZ
23120539220001241	05302253	11/12/2013	LBZ
23120539230001241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

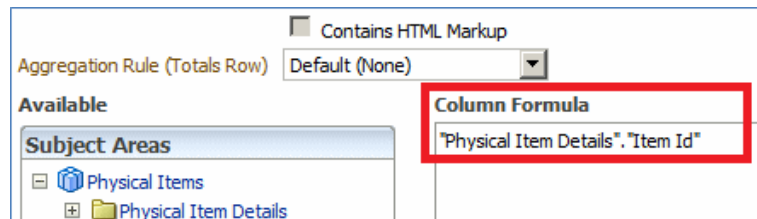


and then select **Edit Formula**:



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

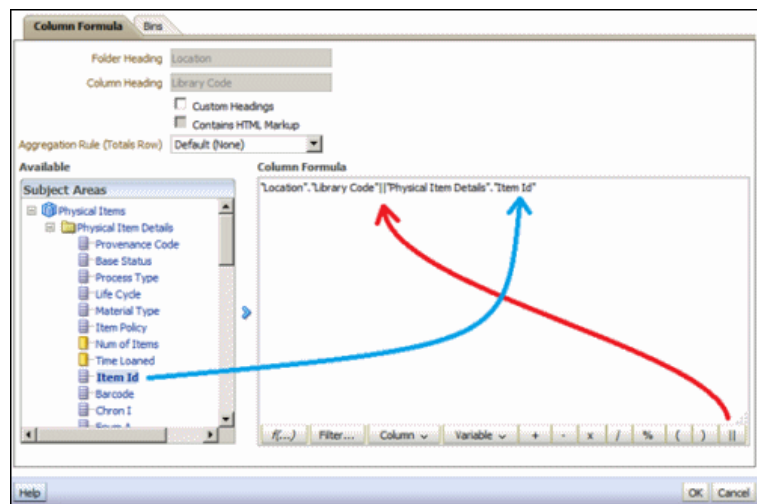


and then select **Edit Formula** for one of the fields that you want to concatenate:

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:

Title			
Table			
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:

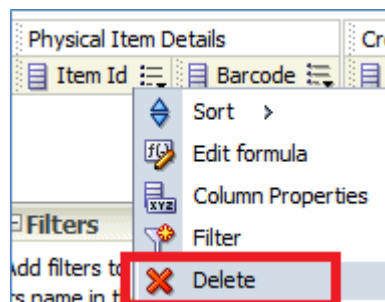
Compound Layout				
Title				
Table				
Item Id	Barcode	Item Creation Date	Library Code '-' Item Id	
23120539170001241	05368761	11/12/2013	LBZ-23120539170001241	
23120539180001241	05302093	11/12/2013	LBZ-23120539180001241	
23120539190001241	05366880	11/12/2013	LBZ-23120539190001241	
23120539200001241	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**.



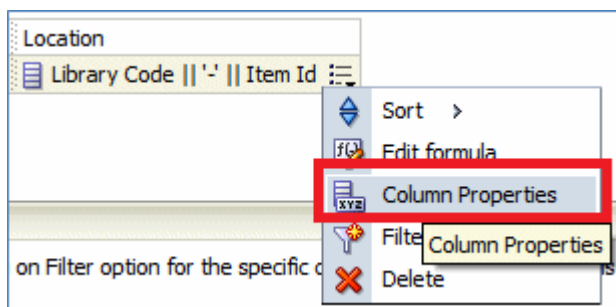
Delete

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 Properties

Style **Column Format** Data Format Conditional Format

Headings

Folder Heading Location

Column Heading Library and Item

☒ Custom Headings

☐ Contains HTML Markup

Value Suppression

XX XXXX XX XXXX
 XXXX XXXX
 XXXX XXXX
 XXXX XXXX

☒ Suppress ☐ Repeat

Column Heading

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

Compound Layout

Title

Table

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

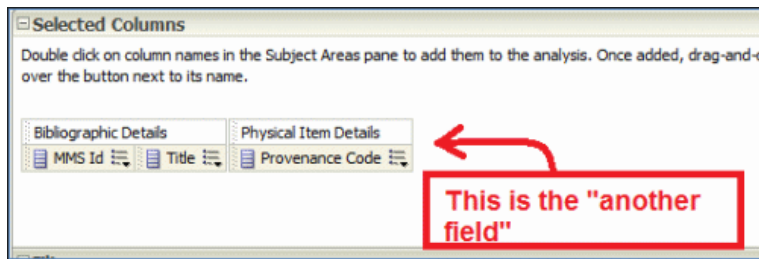
Bibliographic Records with Multi-library Holdings

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.

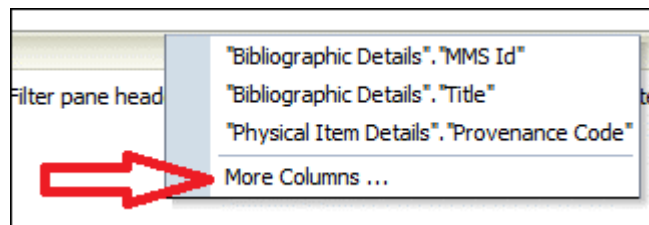


Selected Columns

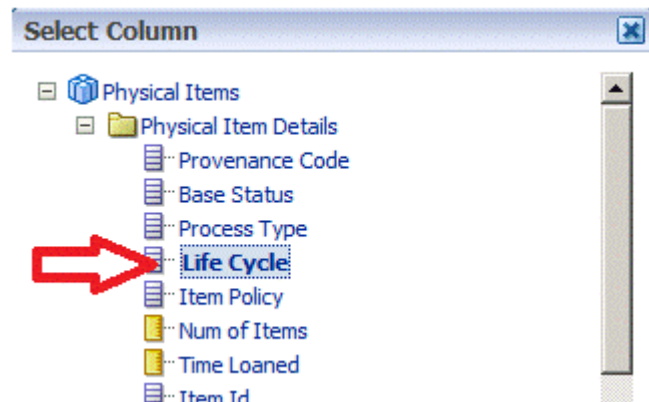
3. In the lower pane, add a filter for Physical Item Details.Lifecycle to be active so that the report does not include deleted items.



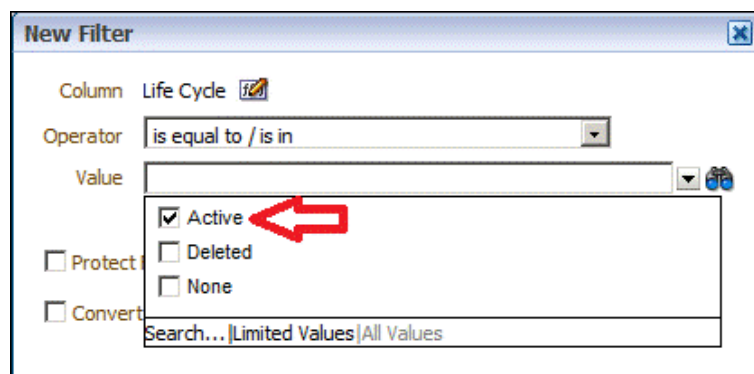
Create Filter



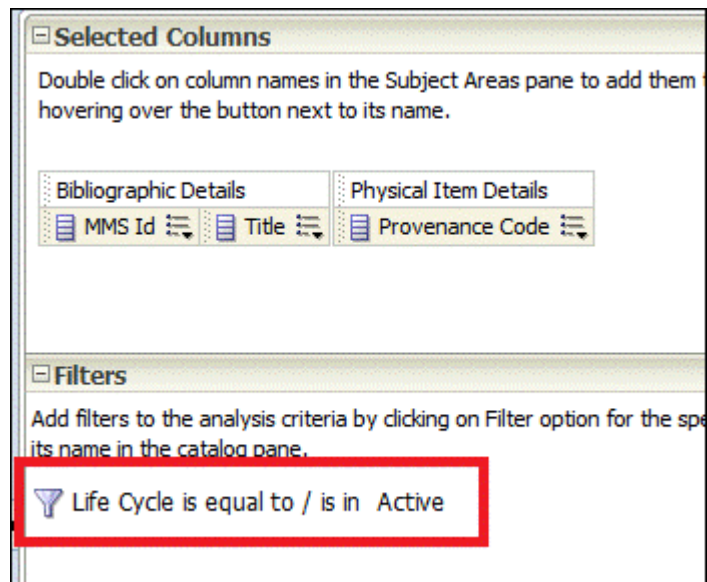
More Columns



Lifecycle

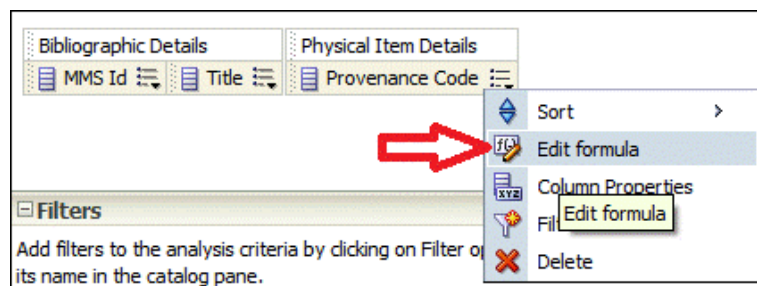


Active



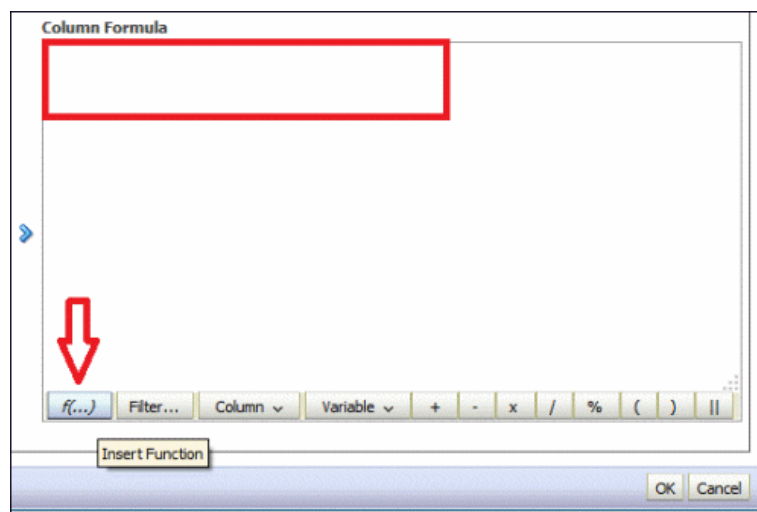
Lifecycle is Equal to Active

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.

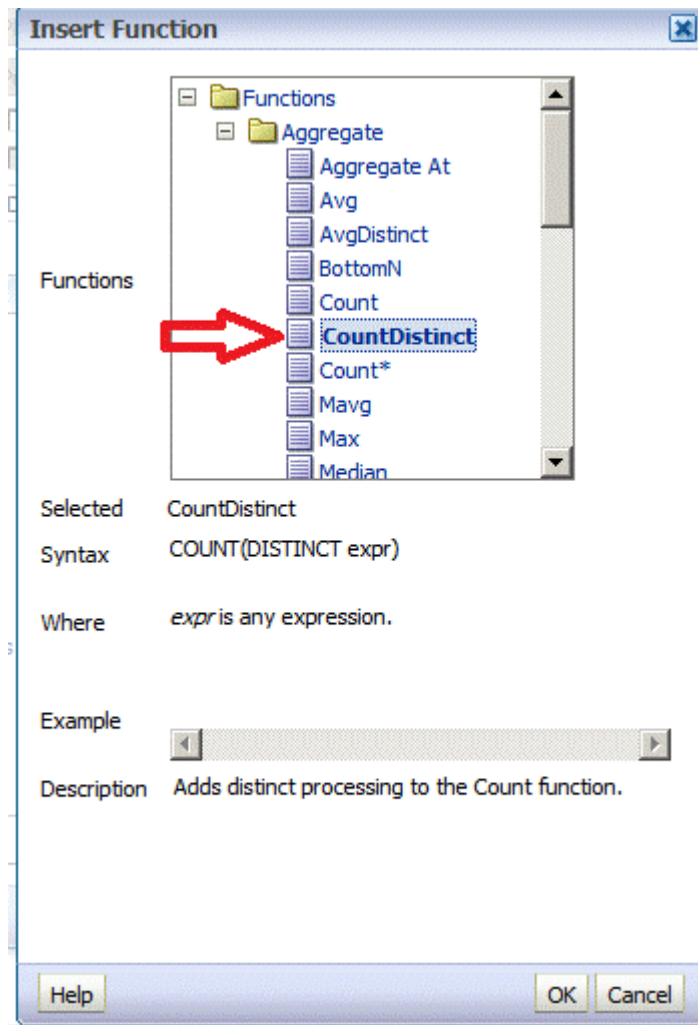


Edit Formula

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

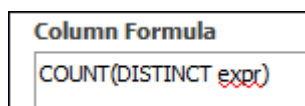


Insert Function



Count Distinct

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

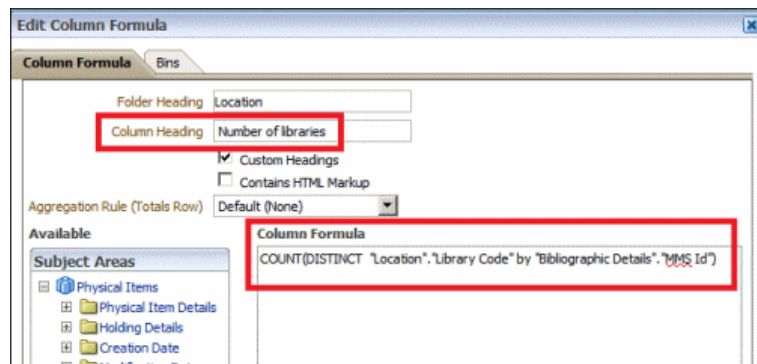


Column Formula

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

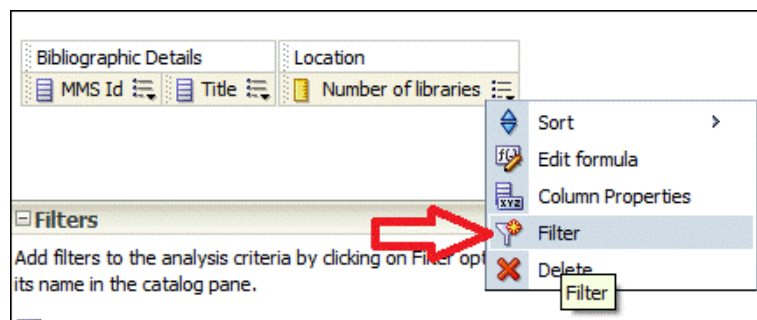
`COUNT (DISTINCT "Location"."Library Code" by "Bibliographic Details"."MMS Id")`

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

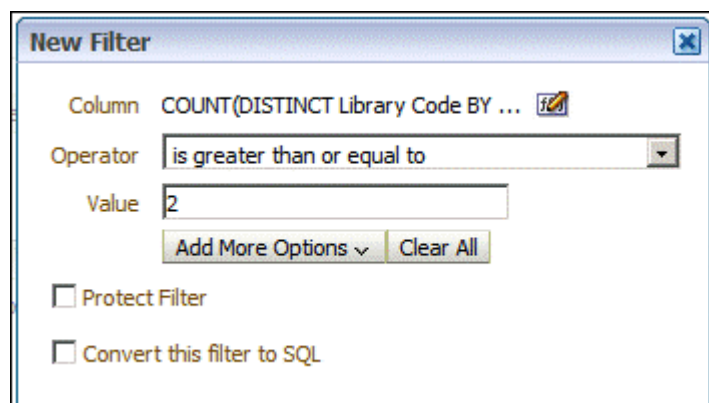


Edit Column Formula

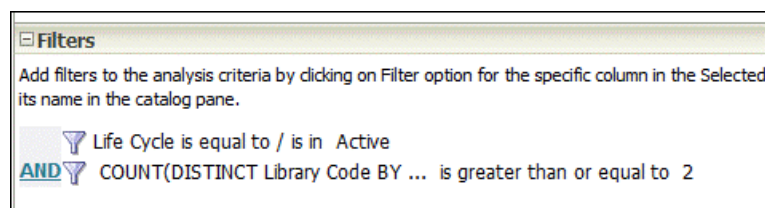
8. Filter the column with the count of libraries to have only rows with two or more libraries (is greater than or equal to 2):



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

Bibliographic records with holdings in more than one library		
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 yǒnbo = 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 zoomorphology	2
991108690000121	Australian journal of botany.	3

Report Results

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

1
[Danmarks kirker.](#)

Book By Nationalmuseet (Denmark) (Kbenhavn, GEC Gad 1933-<1991 > [v. 1 in 1945])
Subject: Church buildings Denmark. -- Church decoration and ornament Denmark. -- Church architecture Denmark.
Language: Danish.

Availability: [Physical version](#) at **UINC: GEN** (3 copies, 3 available)
[Physical version](#) at **ULAW: GEN** (2 copies, 2 available)

[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) | [More info](#)

Danmarks Kirker

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

1
[Australian journal of botany.](#)

Journal (Collingwood, Vic., Australia: CSIRO.)
ISSN: 0067-1924
Language: English.

Availability: [Physical version](#) at **USC: GEN; Botany** from:47 1999 until:49 2001
[Physical version](#) at **UINC: RESV** from:47 1999 until:49 2001
[Physical version](#) at **UEDUC: REF** from:47 1999 until:47 1999

[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) | [More info](#)

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:

- 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	Penguin
9914631050001361	0	World Scientific
9914631060001361	10	Doubleday
9914631070001361	0	Merrill
9914631100001361	2	HarperPerennial
9914631110001361	0	Dryden Press
9914631150001361	2	Adams Media
9914631180001361	1	Macmillan
9914631220001361	1	Elsevier Saunders
9914631240001361	0	Wiley Pub Co
9914631260001361	0	Life Insurance Federation of Australia
9914631280001361	0	Duke University Press
9914631300001361	0	Gryphon
9914631330001361	0	Sams
9914631350001361	0	Methuen
9914631390001361	0	University of Queensland Press
9914631420001361	1	Doubleday Australia
9914631440001361	0	W T I S
9914631470001361	1	Springer
9914631500001361	0	Avionics Communications

Time Loaned

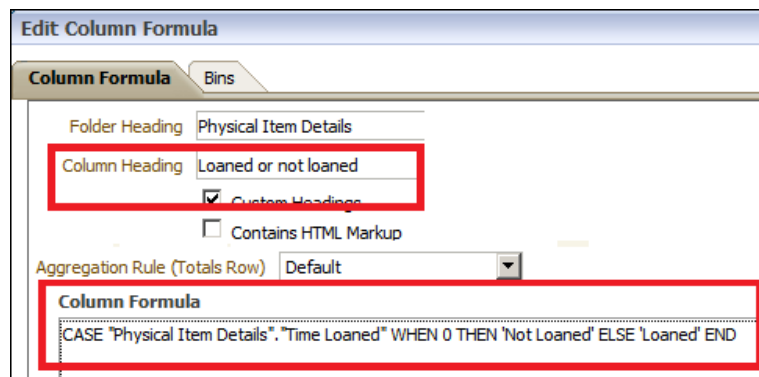
- From the Criteria column, select the More Options icon



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

Column Formula | Bins

Folder Heading: Physical Item Details

Column Heading: **Loaned or not loaned**

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row): Default

Column Formula

`CASE "Physical Item Details"."Time Loaned" WHEN 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



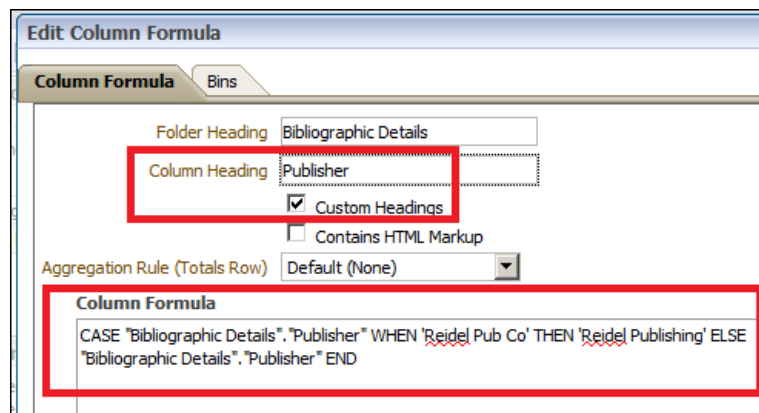
of the Publisher column and select **Edit Formula**.

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

Column Formula | Bins

Folder Heading: Bibliographic Details

Column Heading: **Publisher**

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row): Default (None)

Column Formula

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

Edit Column Formula for Publisher

The following report displays the changed results:

MMS Id	Loaned or not loaned	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	Journal Title	Publisher	Net Price	ISSN
Not Paid	Acta mathematica Hungarica	Akadémiai Kiadó	470	1588-2632; 0236-5294
Not Paid	Advertising age	Crain Communications	110	1557-7414; 0001-8899
Not Paid	Algorithmica	Springer-Verlag	800	1432-0541; 0178-4617
Not Paid	Annals of mathematics	University of Virginia	120	1939-8980; 0003-486X
Not Paid	Applied research in quality of life.	Springer	60	1871-2576; 1871-2584
Not Paid	Chicago tribune	Tribune Co	650	2165-171X; 1085-6706
Paid	Crain's New York business.	Crain Communications Inc	140	8756-789X
Not Paid	Differential equations	MAIK Nauka/Interperiodica	430	1608-3083; 0012-2661
Not Paid	European journal of organic chemistry	Wiley-VCH	730	1099-0690; 1434-193X
Not Paid	European physical journal H	EDP Sciences; Springer Verlag	920	2102-6467; 2102-6459
Not Paid	Genetica	Kluwer Academic Publishers	890	1573-6857; 0016-6707

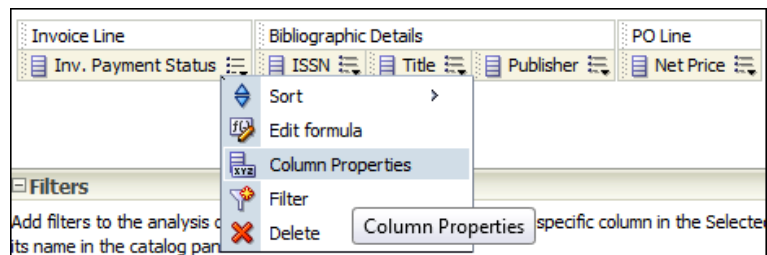
Example Report

To conditionally change the text format in an Analytics report:

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

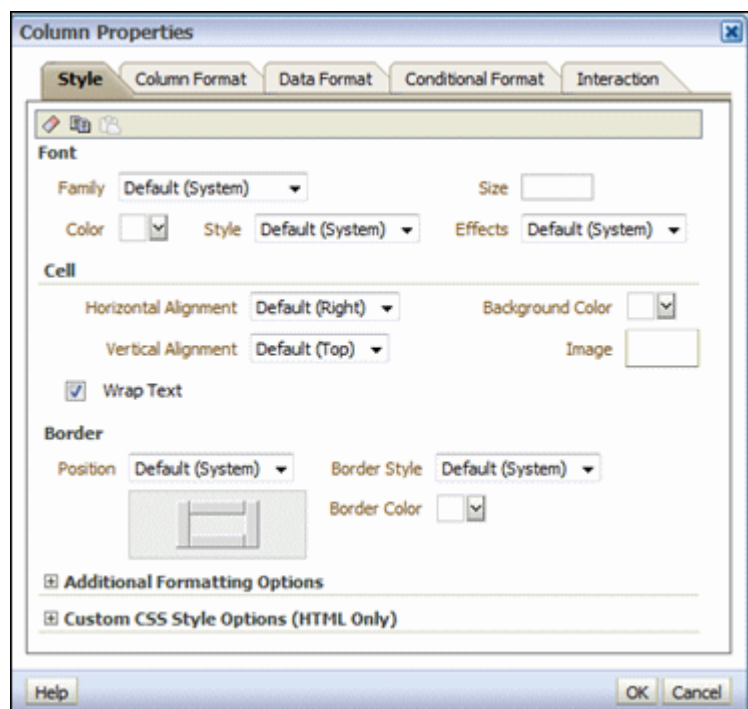


and select **Column Properties**:



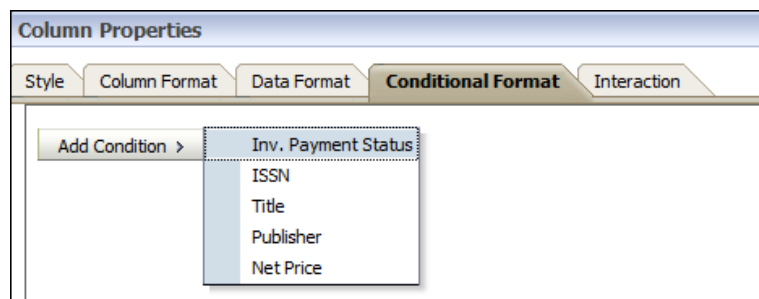
Column Properties

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

Column Case Invoice-Payment Status WHEN

Operator is equal to / is in

Value

☒ Not Paid

☐ Paid

Search... | Limited Values | All Values

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):

Edit Format

Style Data Format

Font

Family Default (System) Size

Color ■ Style Default (System) Effects Default (System)

Red Font

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

Edit Format

Style Data Format

Font

Family Default (System) Size

Color ■ Style Default (System) Effects Default (System)

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.

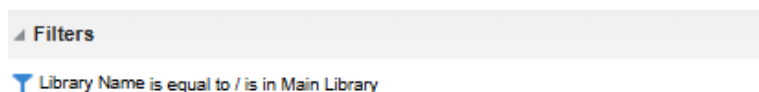
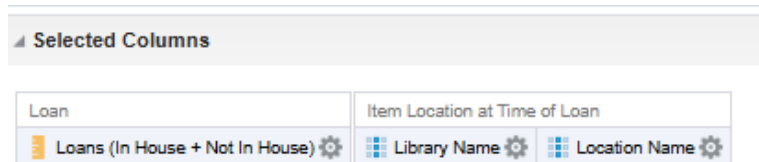
Note

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
 - Item Location > Library Name
 - Item Location > Location Name
3. From the Location Name field, select the More Options icon

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



Report Criteria

Note

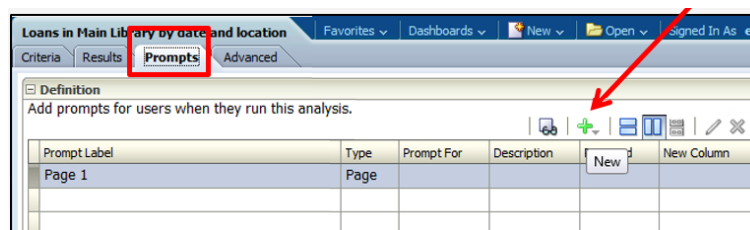
Do not set filters for the columns that you want to have a prompt.

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

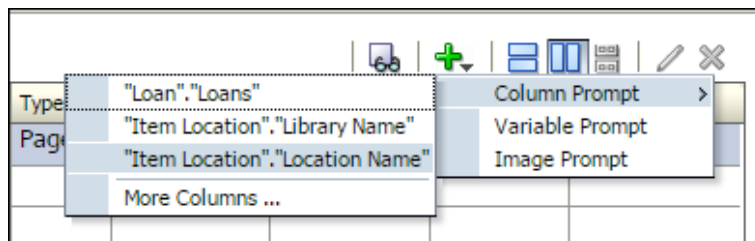
Report Results

6. Select the **Prompts** tab and then the plus sign to add a new prompt.

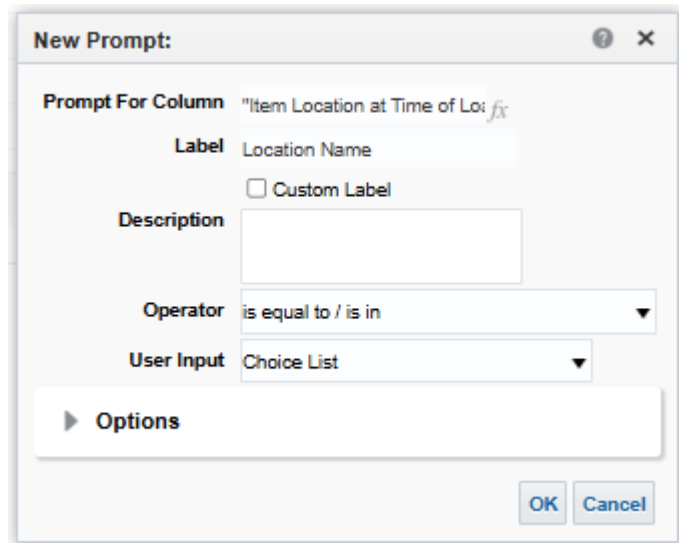


Prompts Tab

The following appears:



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:

Prompt For Column: "Item Location at Time of Loan"

Label: Location Name

☐ Custom Label

Description:

Operator: is equal to / is in

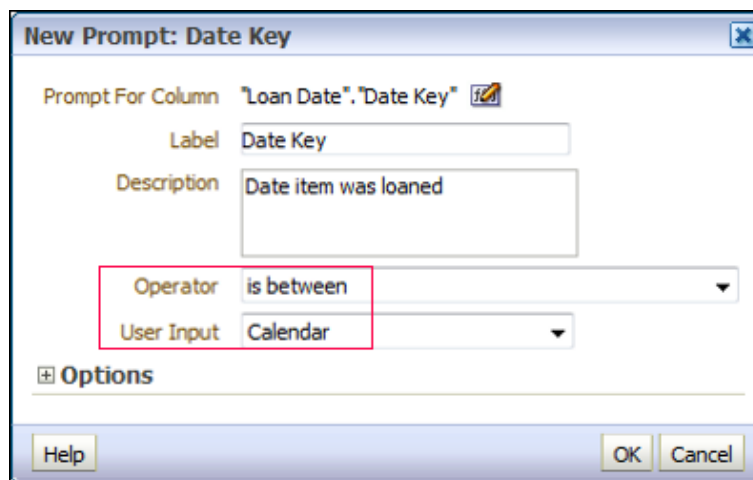
User Input: Choice List

Options

OK Cancel

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**.



New Prompt: Date Key

Prompt For Column: "Loan Date", "Date Key"

Label: Date Key

Description: Date item was loaned

Operator: is between

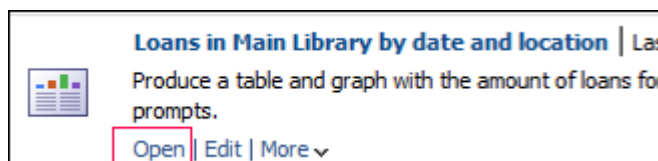
User Input: Calendar

Options

Help OK Cancel

New Prompt: Loan Date

10. Run the report by selecting **Open** (not Edit).



Loans in Main Library by date and location | Last

Produce a table and graph with the amount of loans for prompts.

Open | Edit | More

Run Report

The prompts appear:

Alma Analytics

Loans in Main Library by date and location

Location Name Date Key Between -

[Edit](#) - [Refresh](#) - [Copy](#)

Prompts

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

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

Alma Analytics

Loans in Main Library by date and location

Loans in Main Library by date and location

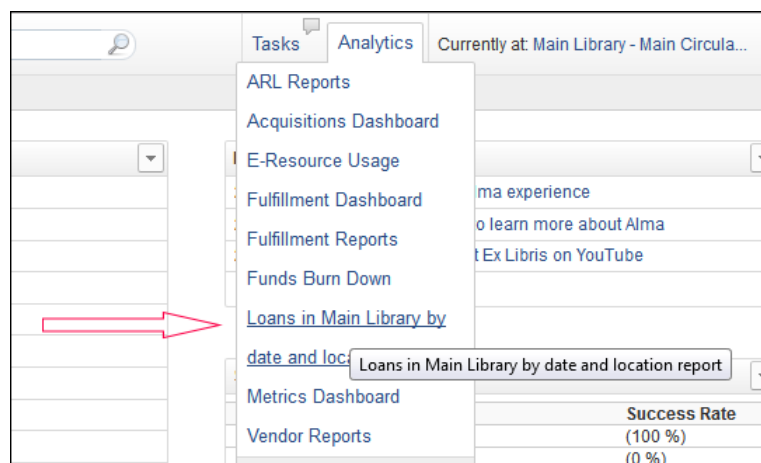
Library Name	Location Name	Loans
Main Library	General	501
	YILIS Main Building	10

[Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Copy](#)

Report

You can add the report to 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 the Analytics menu:



Report in Analytics Menu

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

Recalculate transactions exchange rates	(100 %)
---	---------

Loans in Main Library by date and location		
Open in a new window		
Loans in Main Library by date and location		
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: [?] X

Prompt For Column "PO Line", "Order Line Type I" [icon]

Label Order Line Type Code

☐ Custom Label

Description

Operator is equal to / is in [v]

User Input Choice List [v]

Options

Choice List Values All Column Values [v]

☐ Include "All Column Values" choice in the list

☐ Limit values by All Prompts [v]

☒ Enable user to select multiple values

☒ Enable user to type values

☐ Require user input

Default selection None [v]

Choice List Width ☐ Dynamic ☒ 120 Pixels

Set a variable None [v]

OK Cancel

Edit Prompt

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

Edit Prompt: [?] X

Prompt For Column "PO Line", "Order Line Type I" [icon]

Label Order Line Type Code

☐ Custom Label

Description

Operator is equal to / is in [v]

User Input Choice List [v]

Options

Choice List Values All Column Values [v]

None

All Column Values

Specific Column Values

SQL Results

Members of Groups

All Column Values and Specific Groups

☐ Require user input

Default selection None [v]

Choice List Width ☐ Dynamic ☒ 120 Pixels

Set a variable None [v]

OK Cancel

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.

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**.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Material Type	Column value	Material Type			☐

Display

Page 1

Material Type --Select Value--

Apply Reset

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.

Title	
Table	
Num of Requests	Material Type
849	Book
10	Journal
2,254	Unknown

Material Type Report

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

New Filter

Column: Material Type

Operator: is equal to / is in

Value: is equal to / is in

☐ Protect

☐ Convert

is prompted

OK Cancel

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.

Material Type Report with Prompt

Material Type

Material Type Report #2

Num of Requests	Material Type
849	Book
10	Journal
2,254	Unknown

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.

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`.

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag over the button next to its name.

PO Line

PO Line Reference

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Column pane.

Fund Ledger Name is equal to / is in Library and Information Science
AND "PO Line"."Sent Date" >= TIMESTAMPADD(SQL_TSI_YEAR, -1, CURRENT_DATE)
AND Receiving Status is equal to / is in 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

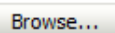
PO Line Reference Report

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

New Filter

Column: PO Line Reference 

Operator: is based on results of another analysis ▼

Saved Analysis: /Shared Folders/Alma University/Ac 

Relationship: is equal to any ▼

Use values in Column: PO Line Reference ▼

☐ Protect Filter

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:

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Or over the button next to its name.

Physical Item Details	PO Line
 Num of Loans	 PO Line Reference

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the its name in the catalog pane.

-  PO Line Reference is equal to any PO Line Reference in
-  PO Line Reference Fund Library and Information Science Sent Last Year

PO Line Reference Filtered By Fund

The following is an example of the report:

Title		  
Loans according to fund Library and Information Science for the last year		
Table		  
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	

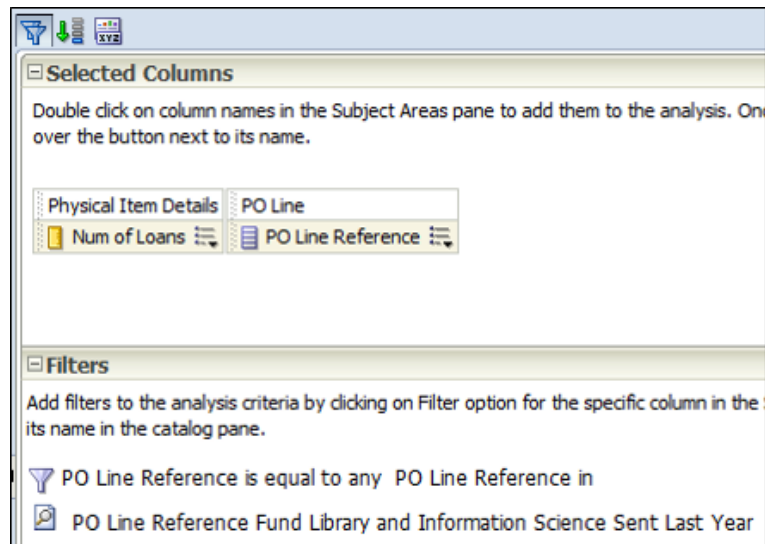
PO Line Reference Filtered By Fund – Report

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

Bins

Folder HeadingPhysical Item Details

Column HeadingItems Not Loaned

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row)Default (Sum)

Available

Subject Areas

Column Formula

FILTER("Physical Item Details", "Num of Items" USING ("Physical Item Details", "Last Loan Date" IS NULL))

Column Formula

Bins

Folder HeadingPhysical Item Details

Column HeadingItems Loaned

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row)Default (Sum)

Available

Subject Areas

Physical Items

Column Formula

FILTER("Physical Item Details", "Num of Items" USING ("Physical Item Details", "Last Loan Date" IS NOT NULL))

Column Formula

Bins

Folder HeadingPhysical Item Details

Column HeadingTotal Items

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row)Default (Sum)

Available

Subject Areas

Column Formula

"Physical Item Details", "Num of Items"

Column Formula

The following is an example of the report:

Title

Loans according to fund Library and Information Science for the last year - analysis

Table

Items Not Loaned	Items Loaned	Total Items
47	4	51

Loans According to Fund Report

You can add a graph to the report:

Compound

Title

Loans ac

Table

Best Visualization

Title

Table

Pivot Table

Performance Tile

Trellis

Graph

the last year - analysis

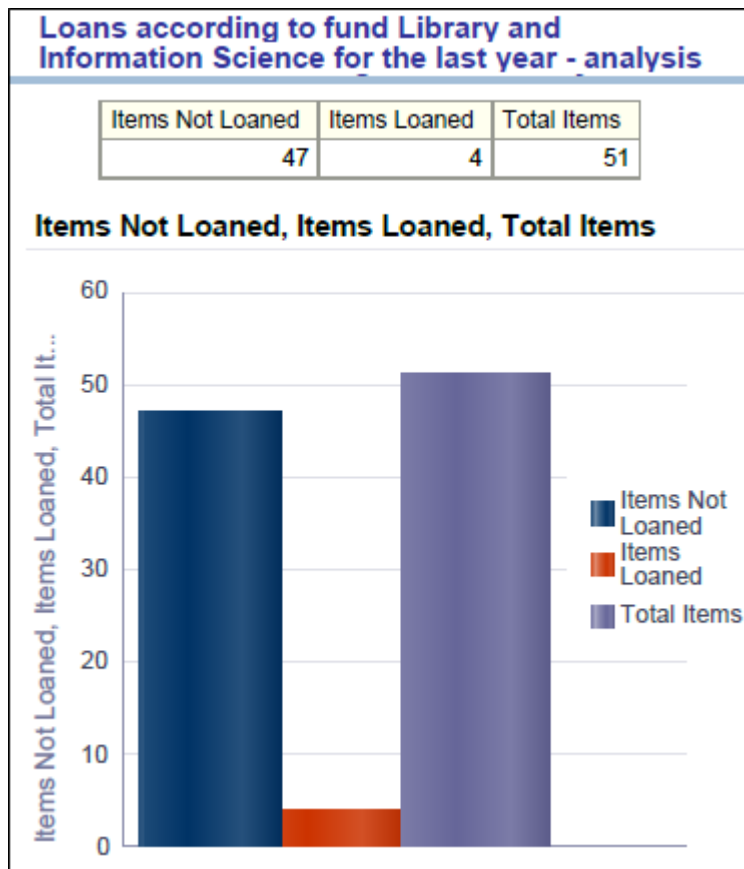
the last year - analysis

Bar

Recommended Subtype

Graph

The following is an example of the graph:



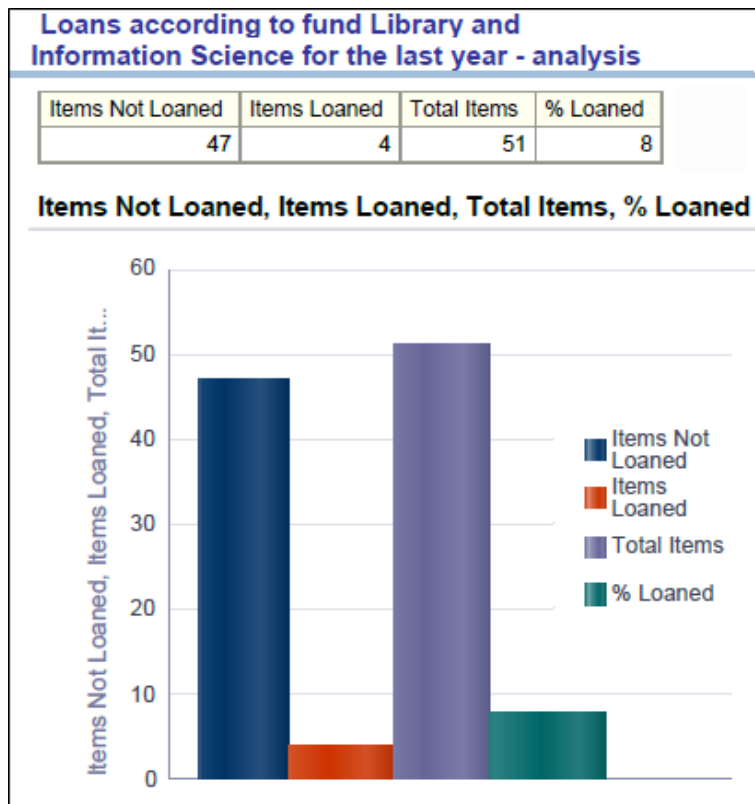
Graph Example

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 then multiply by 100:

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

For example:



Bar Graph with Percentage Example

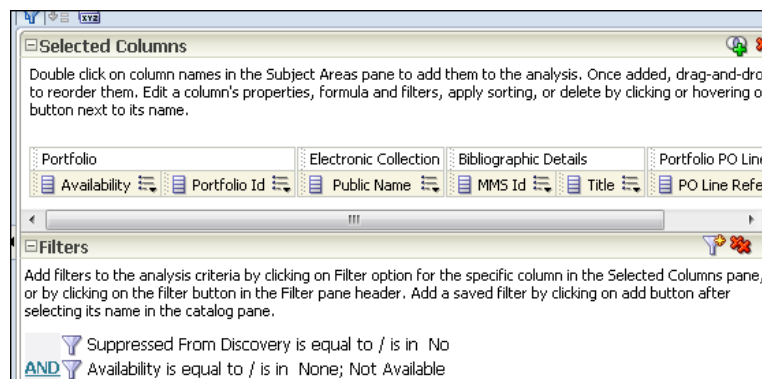
Combined Reports

This section describes how to union two reports by using a placeholder 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.

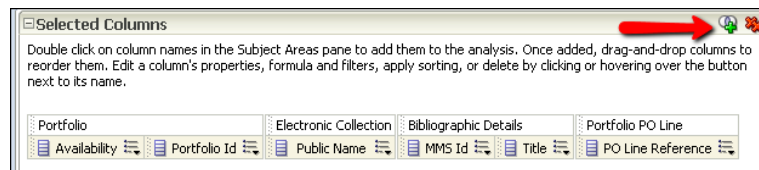
To combine two reports using union to display null values:

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



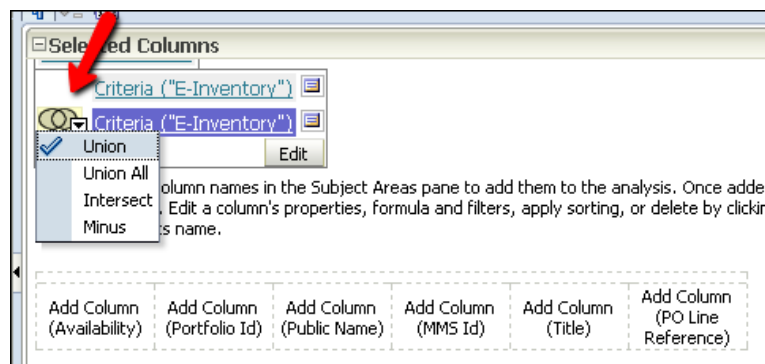
Report Columns and Filters

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



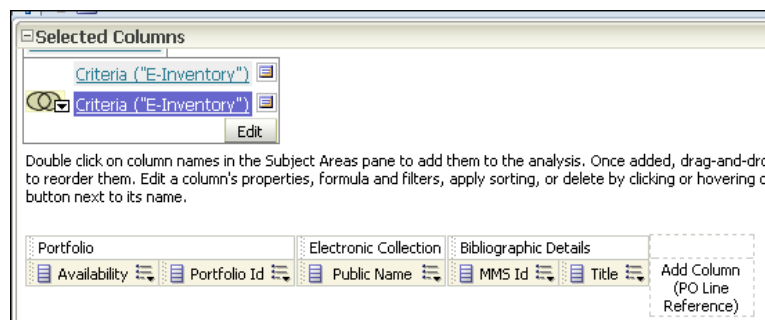
Combine Sets

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



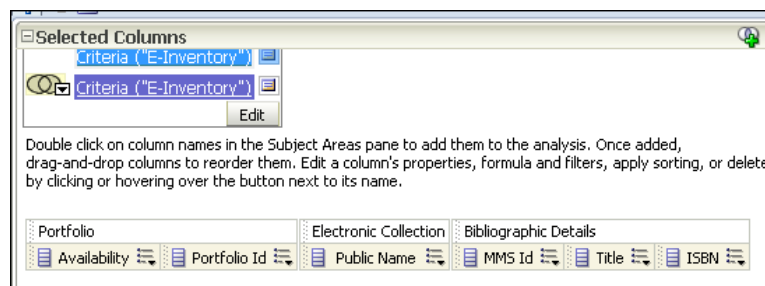
Union

4. In the left panel, find the exact same column for each column in the report, and double select 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 select 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 Bins

Folder Heading: Bibliographic Details

Column Heading: ISBN

☐ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row): Default (None)

Available: Subject Areas

- E-Inventory

Column Formula: 0

Column Formula 0

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

Selected Columns

Criteria ("E-Inventory")

Criteria ("E-Inventory")

Edit

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Portfolio	Electronic Collection	Bibliographic Details	0
Availability	Portfolio Id	Public Name	MMS Id
Title	0		

PO Line Reference Now 0

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

Selected Columns

Edit

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Portfolio	Electronic Collection	Bibliographic Details	0
Availability	Portfolio Id	Public Name	MMS Id
Title	0		

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on the Add button after selecting its name in the catalog pane.

Suppressed From Discovery is equal to / is in No

AND Availability is equal to / is in None; Not Available

Add Two Filters

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

Compound Layout

Title: Paid electronic portfolios NOT available

Time run: 5/24/2015 12:04:41 PM

Table

Availability	Portfolio Id	Public Name	MMS Id	Title	PO Line Reference
Not Available	5312060771000	US Government Documents	996470180001843	Monthly climatic data for world by continents.	0
Not Available	5312624994000		993577283901018	The digital squeeze : libraries at the crossroads : the library resource guide benchmark study on 2012 library spending plans /	0
Not Available	5313285498000		999000693180018	Russian journal of communication	0
Not Available					POL-56497

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.

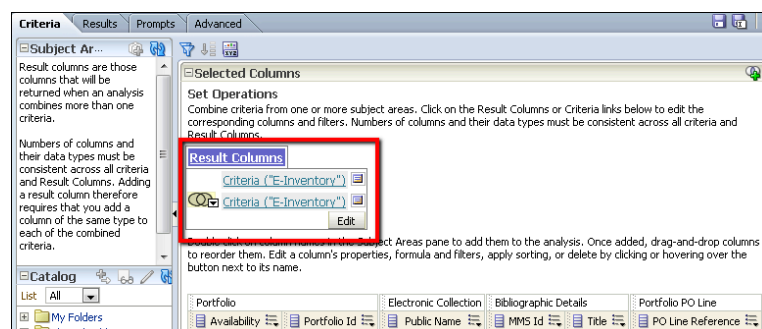
Compound Layout

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

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

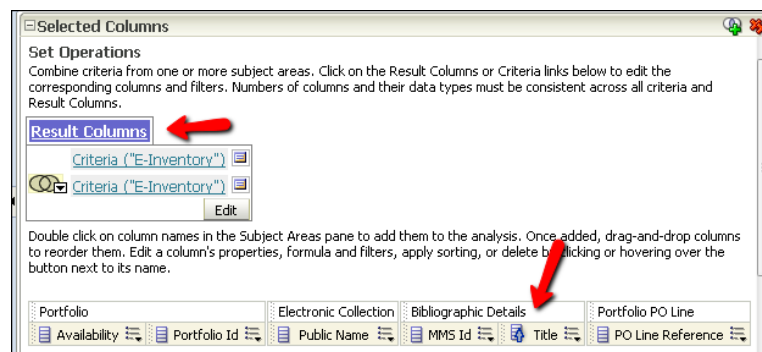
Rows Appear Blank

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 portfolios 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	9964701800018	Monthly climatic data for world by continents.	
Not Available	53132854980		9990006931800	Russian journal of communication	POL-56497
Not Available					
Not Available	53126249940		9935772839010	The digital squeeze : libraries at the crossroads : the library resource guide benchmark study on 2012 library spending plans /	

Sorted by Title

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

Column: Date Key

Operator: is greater than or equal to

Value: 12/03/2013

☐ Protect Filter

☒ Convert this filter to SQL

Edit Filter

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

Advanced SQL Filter

This page allows you to enter a custom where clause using SQL syntax. (e.g. Sales Facts.Dollars < 100).
After entering the SQL, press **OK**.

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

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

This page allows you to enter a custom where clause using SQL syntax. (e.g. Sales Facts.Dollars < 100).
After entering the SQL, press **OK**.

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

Advanced SQL Filter

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

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on its name in the catalog pane.

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

Filters

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

Compound Layout

Title			
Table			
Loans	Renewals	Loan Date	
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 2 – The Current Month

The report displays any items loaned in the current month.

To displays any items loaned in the current month:

- Select the Edit icon



in the filter pane of example #1.

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on its name in the catalog pane.

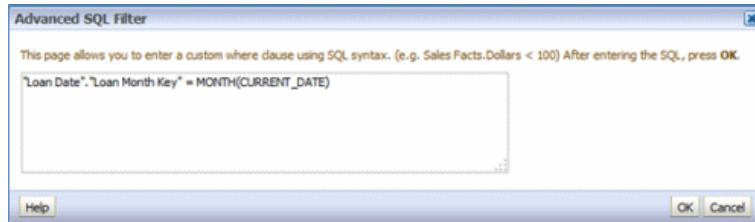
"Loan Date"."Loan Date" >= TIMESTAMPADD(SQL_TSI_DAY, -7, CURRENT_DATE)

Edit Filter

Edit Filter

- Change the text to:

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



Advanced SQL Filter

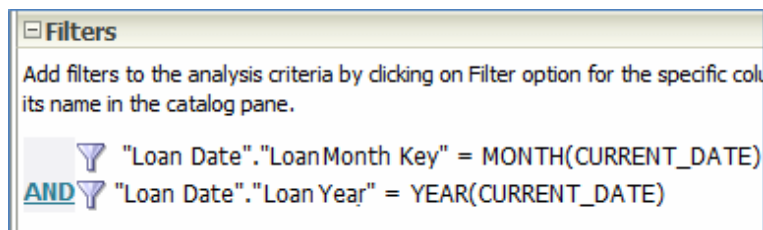
Note

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):

Compound Layout

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:

Compound Layout

Title  

Table  

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

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane in the catalog pane.

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

Filters

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

Compound Layout

Title

Table

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

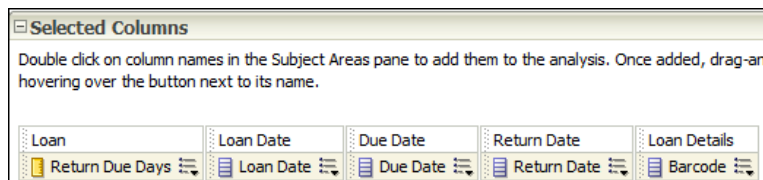
Use the **Loan > Return Due Days** field of the Fulfillment subject area to create this report. This field displays the difference between the due date and the return date. If it is a positive number, the book was returned after the due date. If it is a negative number, the item was returned before the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

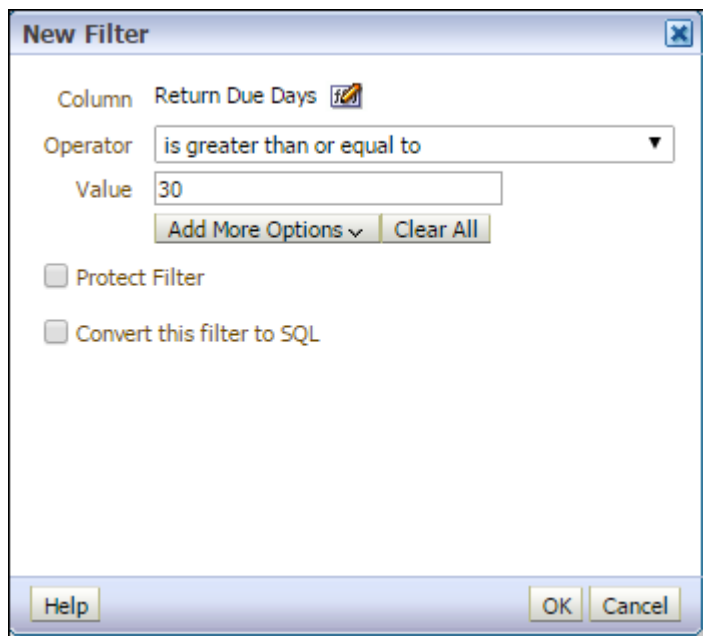


Return Due Days

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

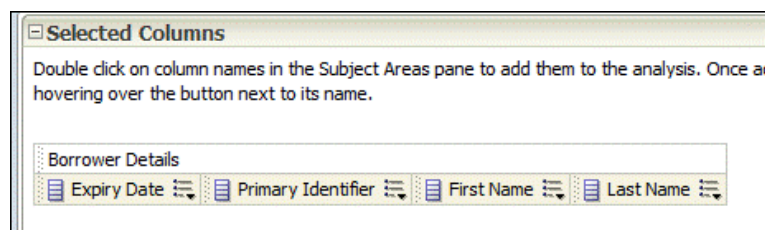
Return Due Days Report

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

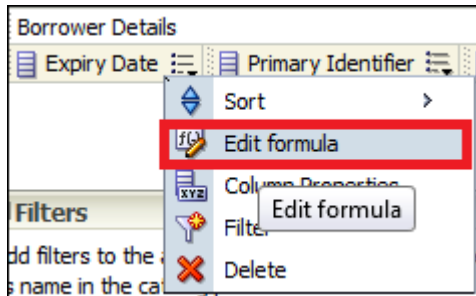


Selected Columns

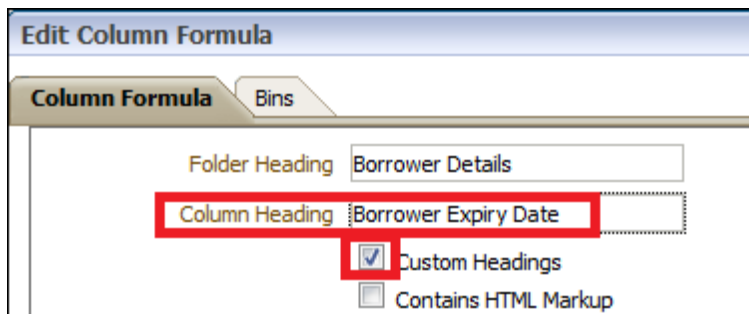
3. To make the heading clearer, rename Expiry Date to Borrower Expiry Date.
 1. Select the More Options icon



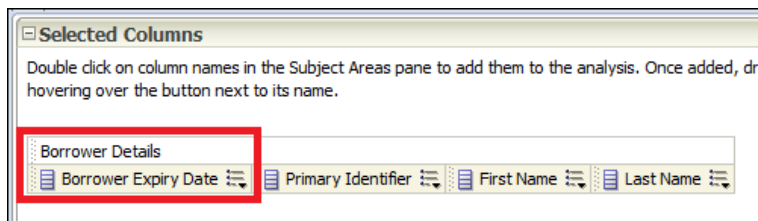
next to Expiry Date and select **Edit Formula**.



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`.

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane.

"Borrower Details"."Expiry Date" BETWEEN (CURRENT_DATE)

AND TIMESTAMPADD(SQL_TSI_WEEK, +1, CURRENT_DATE)

AND

Loan Status is equal to / is in Active

Filter

The following is an example report:

Title			
Ex Libris - Patrons with expiration date within one week from today and have active loans			
Table			
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**.

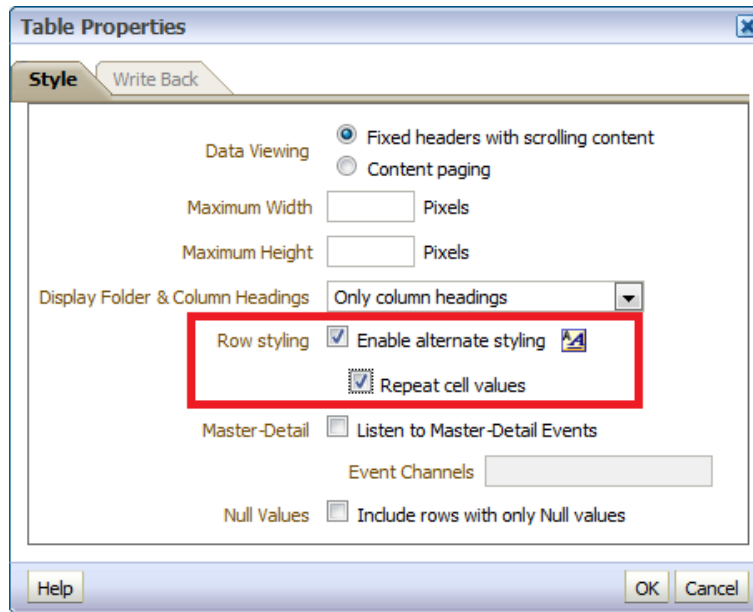


Table Properties

9. Select **OK**.

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

Ex Libris - Patrons with expiration date within one week from today and have active loans			
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

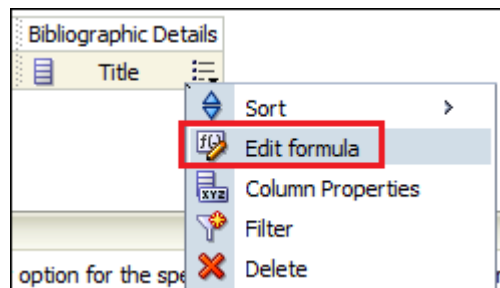
Report with Borrower Expiry Date on Each Row

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.

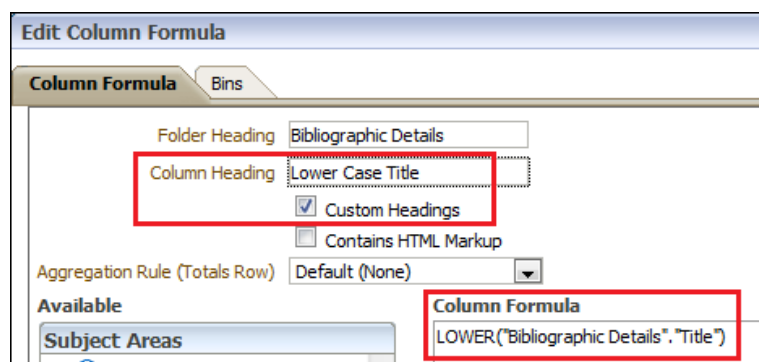
To filter by a string for both uppercase and lowercase with one filter:

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



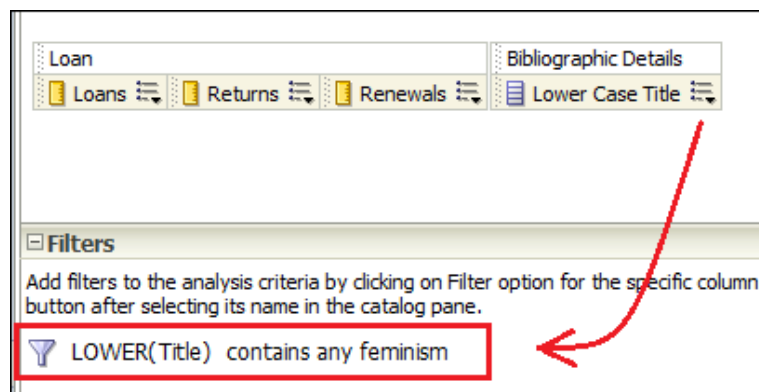
Edit Formula

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

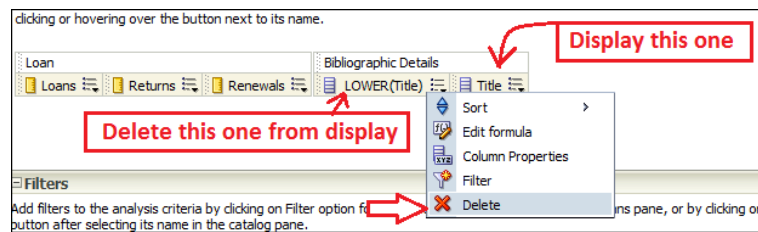
The following is an example of a report. However, all of the titles are in lowercase.

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

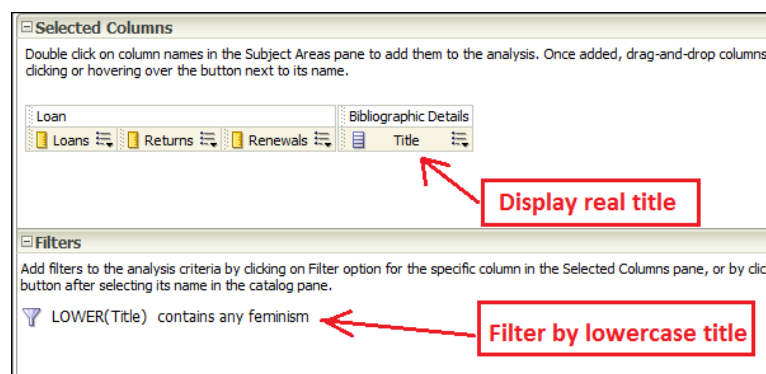
You want to display the real title and filter by the lowercase title.

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, re-interpretation

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](#).