Electronic Inventory & Usage, and Acquisitions

Exercises for Attendees

Electronic Inventory and Usage

View Out-of-the-Box (Default) Reports and Dashboards

1. From Alma, access **Design Analytics**
2. Go to the **Catalog**
3. In **Shared Folders / Alma / Cost per use via COUNTER reports e-inventory and acquisitions data / Dashboards**, open **Electronic Cost Usage Dashboard**
    a. Investigate the various tabs of reports
4. Back in the **Catalog**, in **Shared Folders / Alma / Usage via Alma Link Resolver / Dashboards**, open **Usage via Alma Link Resolver**
    a. Investigate the various tabs of reports
5. Back in the Catalog, in **Shared Folders / Alma / Usage via COUNTER reports - Release 5 / Dashboards**, open **Usage via COUNTER reports**
    a. Set the Prompt - **Material Type Indicator = TR_J1** (both of them)
    b. Click **Apply**
    c. Modify **Usage Date Year** as needed to see data from other years.
    d. Investigate the various tabs.
    e. End on **Most used publishers** because this is the one you'll use for the next exercise.

Create Reports on Electronic Inventory and Usage

1. Customize report for most used publishers in 2020 for TR_B1 Book Requests
    a. In Shared Folders / Alma / Usage via COUNTER reports - Release 5 / Reports, find **Most Used Publishers** and click **Edit**
    b. Switch to **Criteria** tab

c. Change Filter: Hard code the Material Type indicator to “**TR_B1 - Total Item Requests**” (instead of a prompt)
d. Change Filter: Hard code the usage date year to **2022**
e. Remove Filter “Usage Measures Total is in top 10”
f. In **Results** tab, remove the graph but leave the table
g. Save it to your institution's folder as “Publisher usage for TR_B1 in 2022”

2. Create a report, organized by year/month, of the number of portfolios activated in the electronic collection “Ebook Central Perpetual and DDA Titles” (Later, you will get the actual portfolios.)
    a. **Create an Analysis** with the E-Inventory subject area
    b. Add the following fields to the Selected Columns field. **Note**: The text before the period is the folder, the text after the period is the field name)
        i. "Electronic Collection"."Electronic Collection Public Name",
        ii. "Portfolio Activation Date"."Portfolio Activation Month Key"
        iii. "Portfolio Activation Date"."Portfolio Activation Year"
        iv. "Portfolio"."No. of Available Portfolio"
    c. Filter by "Electronic Collection"."Electronic Collection Public Name" = Ebook Central Perpetual and DDA Titles
    d. Check the **Results** tab
    e. Change the layout of the **Year** column to be narrower:
        i. On the Criteria tab, on field “Portfolio Activation Year”, “Edit formula”
        ii. Check the box “Custom Headings”
        iii. Change the column heading from "Portfolio Activation Year" to "Activation
Year"
        iv. Check the box “Contains HTML/JavaScript/CSS Markup” because you added that
        v. Click **OK**
    f. Change the layout of the **Month** column to be narrower (in the same way)
    g. **Save** the report in your institution folder as “Ebook Central Number of Portfolios Activated per Year Month”

3. Create a report of titles of portfolios activated in the electronic collection “Ebook Central Perpetual DDA and Subscription Titles." This will be the actual titles (and not just numbers) of which portfolios were activated during the periods above.
    a. In the **Criteria** tab of the above report that we already made:
        i. Remove field "Portfolio"."No. of Available Portfolio"
        ii. Add field "Portfolio"."Portfolio Id"
        iii. Add field "Bibliographic Details"."Title"
        iv. Without a filter, we’ll get all the titles in the collection (which can be a lot). Filter: "Portfolio Activation Date"."Portfolio Activation Date Filter" = 'Last 365 Days'
    b. **Save As** the report as “Ebook Central Portfolios Activated in Last 365 Days”
    c. Look at the **Results**
    d. Change filters as needed to show good data (like filter for last 24 months)

Acquisitions

View Out-of-the-Box (Default) Dashboards on Acquisitions Data

1. Go to the Analytics **Catalog**
2. In **Shared Folders / Alma / Acquisitions / Dashboards**, open **Acquisitions – Claims Dashboard**
    a. View the tab (report) "**Items - all material types**"
        i. Note the description of what is in the report.
        ii. Note that all columns can be sorted, including sort by Title
        iii. Find a title that is not a journal
        iv. Note the POL Reference number and Expected Receiving Date
        v. **Back in Alma**, **Search** for that item using Physical Titles by MMSID
        vi. Click the number of orders, and on the PO Line, see expected delivery date, which should match what you saw in Analytics.
    b. In **Analytics**, switch to tab "**Items - Journals**"
        i. Note the description of the report.
        ii. Note that the information here is the same as previous tab but only for journals
    c. Switch to tab "**Electronic Portfolios**"
        i. Note the description of the report.
        ii. Find an example that has a POL with Active status; copy the PID
        iii. **Back in Alma**, search for that portfolio using Electronic Portfolios by Portfolio PID.
        iv. Note that it has an order and is not active (black institution symbol)
        v. **Edit** the Portfolio, switch to **Acquisitions** tab, then click the POL to navigate to the POL.
        vi. Note the Expected Activation Date, or E-Activation Due After Ordering (days)
    d. In **Analytics**, switch to tab "**Electronic Collections**"
        i. Note the description of the report.
        ii. Find an example of a collection and copy the PID
        iii. **Back in** Alma, search for Electronic Collections by Electronic Collection PID.
        iv. **Edit** the Collection, and on **General** tab, see that it has a POL, but not an activation date.
        v. On the **Additional** tab, at the bottom, note there are no active portfolios.

3. In **Shared Folders / Alma / Acquisitions / Dashboards**, open **Acquisitions - Fund Reports**
    a. View the tab (report) **"Fund Balances"**
        i. Note the description of the report.
        ii. Note the data in the column "percent of year completed"
        iii. Note that the column "Percent Spent YTD" has numbers in red if greater than 80%
    b. View the tab **"Fund Balances Visualization"**
        i. Note that it summarizes the situation into a visualization.
        ii. Go back to the previous tab (Fund Balances) and filter by one fund (enter the Fund Code manually)
        iii. Return to Fund Balances Visualization.

iv. Now you have the visualization for one fund.

c. View the tab “Title by Title list”
   i. Note that the report can be exported (gear icon in upper-right corner)
   ii. Copy one of the POL numbers for the next step
d. View the tab “Invoice lookup”
   i. Use the first POL from the previous tab and look up an invoice.

4. In **Shared Folders / Alma / Acquisitions / Dashboards**, open **Acquisitions Dashboard**
   a. View the tab “Annual Trend”
      i. Filter by FY2021 and FY2022 and note changes
   b. View the tab “Classifications”
      i. Filter by a specific library and note changes
      ii. In the table on lower-right, expand the Classifications Total
   c. View and explore other reports (tabs)

Create Acquisitions Reports

1. Make a list of New Titles received in the past month
   a. **Create an Analysis** using the **Funds Expenditures** subject area.
   b. Add the following fields to the Selected Columns field. **Note**: The text before the period is the folder, the text after the period is the field name):
      i. "Bibliographic Details"."Author"
      ii. “Bibliographic Details"."MMS Id"
      iii. “Bibliographic Details"."Title"
      iv. “PO Line"."PO Line Reference"
      v. “PO Line"."Receiving Date (Latest in POL)"
   c. Add a Filter for “PO Line"."Receiving Status" = Yes
   d. Add a Filter on "Receiving Date (Latest in POL)" to get only those with a date in the last 30 days.
      i. Convert this filter to SQL
      ii. "PO Line"."Receiving Date (Latest in POL)" >= TIMESTAMPADD(SQL_TSI_DAY,-30,CURRENT_DATE)
      iii. The above SQL means that the receiving date is greater than 30 days ago.
   e. Check the **Results** tab
   f. **Save** the analysis in your institution's folder: “New Titles Received in the Last 30 Days”

2. Create a report of Fund Expenditures by Fiscal Period, Format, and Subject
   a. **Create an Analysis** using the **Fund Expenditures** subject area
      i. Add the following fields to **Selected Columns**:
         1. "Fund Transactions"."Transaction Expenditure Amount"
         2. "Fund Ledger"."Fund Ledger Name"
      ii. Add the following **Filters**:
         1. Fiscal Period > Fiscal Period Filter = Previous Fiscal Year
         2. Fund Ledger > Fund Type = Allocated fund

iii. Check the **Results** tab
iv. Change the appearance to be more useful
    1. On the **Criteria** tab: Sort the transaction expenditure amount descending
    2. On the **Results** tab: Add a bar graph visualization > Vertical

b. Add each resource's Format (print, electronic, book, and so on) to the report. By the way, the Format information may be taken from two places, and these instructions will show both.
    i. **Remove** the sort descending on the transaction amount. This way, the formats will be grouped (sorted) together.
    ii. First format source: From bib record
        1. Add "Bibliographic Details"."Material Type"
        2. Switch to **Results** to see how it looks.
        3. Back on **Criteria** tab, remove that field you just added.
    iii. Second format source: From PO Line
        1. Add field "PO Line Type"."Format"
        2. Switch to **Results** to see how it looks
        3. Move Format column to beginning of the table
        4. Display the subtotal per format on the table: Right-click the "Format" column header and choose "Show Subtotal > After Values"

c. Add the Subject to the report
    i. On **Criteria** tab: Remove Format field
    ii. The "Subject" may be taken from a variety of places; see if you can find them using the Search function in the Subject Areas folders.
    iii. Add field "LC Classifications"."Group 1"
    iv. On the **Results** tab, move Group1 column to be the first column

d. Save the Report to your institution's folder: "Funds Expenditures by LC Class Group 1"