

Integration of Analytics in Alma

Viewing arrived and missing issues in Alma

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The integration

- As part of a trend to bring the power of the Alma analytics reports into the Alma staff user interface there is now a link to an analytics report of issues directly from the “Receiving Workbench”.
- When staff begin to receive the issues they can click a link to receive an analytics report for items of the POL on which they are working

The integration

- The analytics report includes, for the specific POL, all items which have either
 - A. Been received in the last year or
 - B. Have no receiving date.
- This provides an easy way to see in one glance what has arrived and what still needs to arrive based on the expected activation date.
- Future development plans include the option for each institution to customize the analytics report as desired.

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Example 1

- From the “Continuous” tab of the receiving workbench we click “manage items” for “Abstracts in anthropology”

Item description	Date Sent	Actions
Abstracts in anthropology., Greenwood Press [etc.], v. 1- Feb. 1970-, 0001...	04/15/2015	View hidden Manage Items Receive

Example 1

- From the list of items of the POL for “Abstracts in Anthropology” we have a link to “Analytics Issues Report”

PO line Items

Receiving note REF. GN1 .A3 PENCILED ON; SEND TO REF.

Sort routine Enumeration-Descend

Receiving status All Location All

[Receive New Items](#) [Analytics Issues Report](#)

		Library	Location	Temp Loc	Modified
1	<input type="checkbox"/>	Robert W. Jones Library	Jones Reference	No	02/08/2016
2	<input type="checkbox"/>	Robert W. Jones Library	Jones Reference	No	12/03/2015

Example 1

- The report opens in a separate window showing all items received in last year or not received at all, together with the expected arrival date.
- On the next screen, for example, we can quickly see that while Vol. 71 issue 4 already arrived, we are still missing Vol. 71 issue 3 (it has no receiving date)
- In a future release, when it will be possible to customize the report, institutions will be able to add additional fields and styles to the report.

Example 1

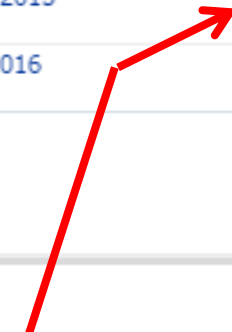
[Open in a new window](#) [Expand](#)

Analytics Issues Report

PO Line Reference	Vendor Code	Barcode	Title	Description	Expected Arrival Date ▲ ▼	Receiving Date
90330	SER-EBSCO	2794353-1190	Abstracts in anthropology.	V.70 NO.1 2015	2/3/2015	
90330	SER-EBSCO	2794353-1230	Abstracts in anthropology.	V.71 NO.1 2015	10/4/2015	12/21/2015
90330	SER-EBSCO	2794353-1240	Abstracts in anthropology.	V.71 NO.2 2015	11/3/2015	1/7/2016
90330	SER-EBSCO	2794353-1250	Abstracts in anthropology.	V.71 NO.3 2015	12/4/2015	
90330	SER-EBSCO	2794353-1260	Abstracts in anthropology.	V.71 NO.4 2015	1/3/2016	2/8/2016

[Refresh](#) - [Print](#) - [Export](#)

[Close](#)



Vol. 71 issue 4 already arrived, we are still missing Vol. 71 issue 3

Example 2

- From the “Continuous” tab of the receiving workbench we click “manage items” for “Economic and political weekly”

Item description	Date Sent	Actions
Economic and political weekly.. Sameeksha Trust.. Began publication with v...	06/09/2015	View hidden Manage Items Receive

Example 2

- From the list of items of the POL for “Economic and political weekly” we have a link to “Analytics Issues Report”

PO line Items

Receiving note CURRENT

Sort routine Enumeration-Descend ▾

Receiving status All 🔍 Location All 🔍

[Receive New Items](#) [Analytics Issues Report](#)

	<input type="checkbox"/>	Library	Location	Temp Loc	Modified	Call Number
1	<input type="checkbox"/>	Robert W. Jones Library	Jones Current Periodicals	No	03/24/2016	HC431 .E326
2	<input type="checkbox"/>	Robert W. Jones Library	Jones Current Periodicals	No	03/24/2016	HC431 .E326

Example 2

- The report opens in a separate window showing all items received in last year or not received at all, together with the expected arrival date.
- On the next screen, for example, we can quickly see that while Vol. 51 issues 28-32 already arrived, we are still missing Vol. 51 number 27 (it has no receiving date)
- In a future release, when it will be possible to customize the report, institutions will be able to add additional fields and styles to the report.

Example 2

Vol. 51 issues 28-32 already arrived, we are still missing Vol. 51 number 27

[Open in a new window](#) [Expand](#)

94955	SER-EBSCO	EMU34554	Economic and political weekly.	v.51:no.27(2016:July 02)	8/1/2016	
94955	SER-EBSCO	EMU34555	Economic and political weekly.	v.51:no.28(2016:July 09)	8/8/2016	7/28/2016
94955	SER-EBSCO	EMU34556	Economic and political weekly.	v.51:no.29(2016:July 16)	8/15/2016	7/28/2016
94955	SER-EBSCO	EMU34557	Economic and political weekly.	v.51:no.30(2016:July 23)	8/22/2016	8/5/2016
94955	SER-EBSCO	EMU34558	Economic and political weekly.	v.51:no.31(2016:July 30)	8/29/2016	8/17/2016
94955	SER-EBSCO	EMU34559	Economic and political weekly.	v.51:no.32(2016:Aug. 06)	9/5/2016	8/19/2016
94955	SER-EBSCO	EMU34560	Economic and political weekly.	v.51:no.33(2016:Aug. 13)	9/12/2016	
94955	SER-EBSCO	EMU34561	Economic and political weekly.	v.51:no.34(2016:Aug. 20)	9/19/2016	
94955	SER-EBSCO	EMU34562	Economic and political weekly.	v.51:no.35(2016:Aug. 27)	9/26/2016	
94955	SER-EBSCO	EMU34563	Economic and political weekly.	v.51:no.36(2016:Sept. 03)	10/3/2016	
94955	SER-	EMU34564	Economic and political	v.51:no.37(2016:Sept. 10)	10/10/2016	

[Close](#)

01GALI_EMORY

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Our specific results

How does it work?

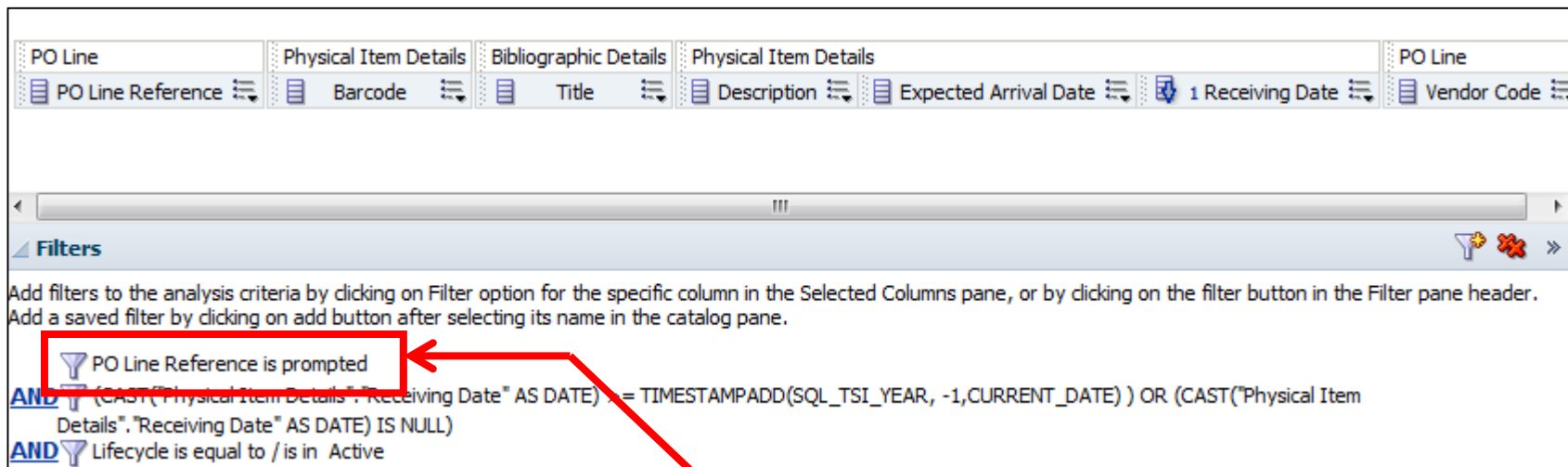
- When the staff user clicks “Analytics Issues Reports” and sees the Analytics Report he is seeing an “Out of the box” report called “Analytics Issues Report” from the folder “Alma > Acquisitions > Reports”

The screenshot displays the Alma system interface. On the left, the 'Folders' pane shows a hierarchical tree structure. The 'Alma' folder is expanded, revealing subfolders: 'Subject Area Contents', 'Dashboards', 'Acquisitions', 'Agents', 'Dashboards', 'Prompts', 'Reports', 'Cost per Use', and 'E-Inventory'. The 'Reports' folder under 'Acquisitions' is highlighted with a red box. On the right, the main content area shows a list of reports. The first report, 'Analytics Issues Report', is highlighted with a red box. Below it are 'Detailed Expenditures', 'Expenditure Per Acquisition Method', and 'Expenditure Per Acquisition Method - Annual Trend'. Each report entry includes a report icon, the report name, the last modified date and time, and links for 'Open', 'Edit', and 'More'.

Type	Sort	Name A-Z	Show
	Analytics Issues Report	Last Modified 7/10/2016 10:54:	
Open Edit More ▼			
	Detailed Expenditures	Last Modified 8/7/2016 2:33:16 P	
Open Edit More ▼			
	Expenditure Per Acquisition Method	Last Modified 8/7/	
Open Edit More ▼			
	Expenditure Per Acquisition Method - Annual Trend		
Open Edit More ▼			

How does it work?

- When the report opens it does a “prompt” automatically by POL and takes it from the POL of the order on which the staff user did “manage items” in the Alma receiving workbench. The report is then displayed with the POL filter.



PO Line Reference is prompted

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Our specific results

Our specific results from example 1

- The POL for “Abstracts in Anthropology” is 90330

Receiving Settings

Received Date

Keep in Department ☒ Next Step


Waiting for Receiving PO lines list

	↕ #	↕ Item description
1	90330	<u>Abstracts in anthropology.. Greenwood Press [etc.], v. 1- Feb. 1970-. 0001-3455. ISSN</u>

Our specific results from example 1


- We can use the “Out of the box” report called “Analytics Issues Report” and directly filter by this POL in Alma analytics


Edit Filter


Column	PO Line Reference	
Operator	is equal to / is in	
Value	90330	
<div>Add More Options ▼ Clear All</div>		

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. Add a saved filter by clicking on add button after selecting its name in the catalog pane.








 PO Line Reference is equal to / is in 90330

AND  (CAST("Physical Item Details"."Receiving Date" AS DATE) >= TIMESTAMPADD(SQL_TSI_YEAR, -1,CURRENT_DATE)) OR (CAST("Physical Item Details"."Receiving Date" AS DATE) IS NULL)

AND  Lifecycle is equal to / is in Active

Our specific results from example 1

- Now we get the same results we had when clicking the link from within Alma

Title   						
Analytics Issues Report						
Table    						
PO Line Reference	Vendor Code	Barcode	Title	Description	Expected Arrival Date▲▼	Receiving Date
90330	SER-EBSCO	2794353-1190	Abstracts in anthropology.	V.70 NO.1 2015	2/3/2015	
90330	SER-EBSCO	2794353-1230	Abstracts in anthropology.	V.71 NO.1 2015	10/4/2015	12/21/2015
90330	SER-EBSCO	2794353-1240	Abstracts in anthropology.	V.71 NO.2 2015	11/3/2015	1/7/2016
90330	SER-EBSCO	2794353-1250	Abstracts in anthropology.	V.71 NO.3 2015	12/4/2015	
90330	SER-EBSCO	2794353-1260	Abstracts in anthropology.	V.71 NO.4 2015	1/3/2016	2/8/2016

Our specific results from example 2

- The POL for “Economic and political weekly” is 94955

Receiving Settings

Received Date: 08/30/2016

Keep in Department: ☒ Next Step: Awaiting cataloging

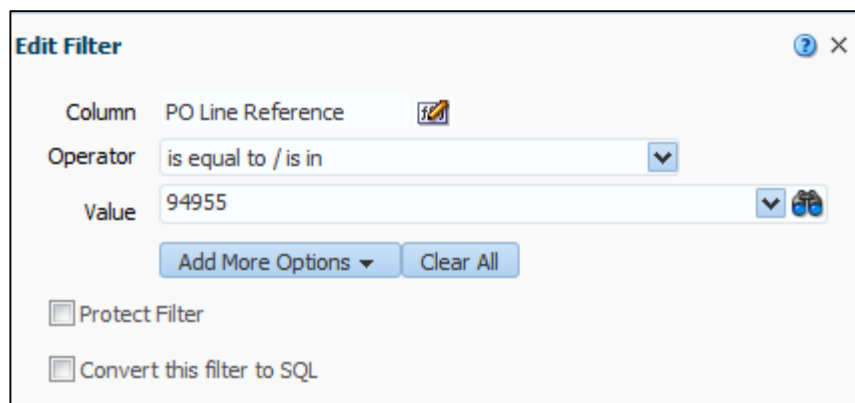
One Time Continuous

Waiting for Receiving PO lines list

△ #	◆ Item description
94955	Economic and political weekly., Sameeksha Trust., Began publication with vol. 1 in Aug. 1966?, 0012-9976, ISSN

Our specific results from example 2

- We can use the “Out of the box” report called “Analytics Issues Report” and directly filter by this POL in Alma analytics



Edit Filter [?] [X]

Column: PO Line Reference [icon]


Operator: is equal to / is in [v]


Value: 94955 [v] [icon]


[Add More Options v] [Clear All]

☐ Protect Filter

☐ Convert this filter to SQL

 PO Line Reference is equal to / is in 94955

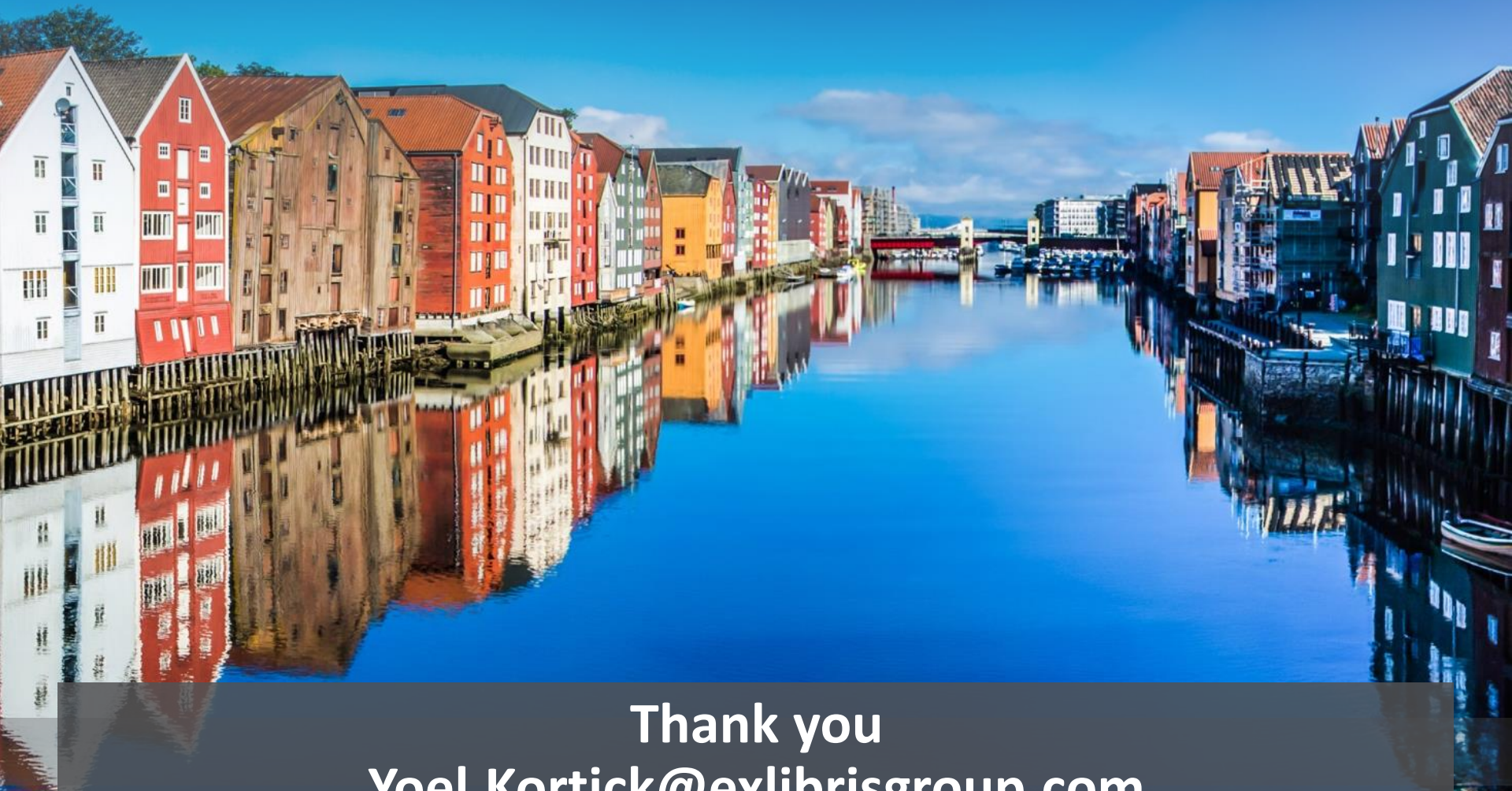
AND  (CAST("Physical Item Details"."Receiving Date" AS DATE) >= TIMESTAMPADD(SQL_TSI_YEAR, -1,CURRENT_DATE)) OR (CAST("Physical Item Details"."Receiving Date" AS DATE) IS NULL)

AND  Lifecycle is equal to / is in Active

Our specific results from example 2

- Now we get the same results we had when clicking the link from within Alma

Compound Layout						
94955	SER-EBSCO	EMU34554	Economic and political weekly.	v. 51:no. 27(2016:July 02)	8/1/2016	
94955	SER-EBSCO	EMU34555	Economic and political weekly.	v. 51:no. 28(2016:July 09)	8/8/2016	7/28/2016
94955	SER-EBSCO	EMU34556	Economic and political weekly.	v. 51:no. 29(2016:July 16)	8/15/2016	7/28/2016
94955	SER-EBSCO	EMU34557	Economic and political weekly.	v. 51:no. 30(2016:July 23)	8/22/2016	8/5/2016
94955	SER-EBSCO	EMU34558	Economic and political weekly.	v. 51:no. 31(2016:July 30)	8/29/2016	8/17/2016
94955	SER-EBSCO	EMU34559	Economic and political weekly.	v. 51:no. 32(2016:Aug. 06)	9/5/2016	8/19/2016



Thank you
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