|  |  |
| --- | --- |
| **How to make a serial claim report by shelving location using Alma Analytics** |  |



**Yoel Kortick**

**Senior Librarian**

**Question:**

Is it possible to use Alma Analytics to generate “serials claim” reports, according to shelving location?

**Answer:**

In addition to the below Alma has an automated method of dealing with claims, and this is for Purchase Order Lines of type “one time” as well as “continuous”. See [Processing Claims](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/020Purchasing/100Processing_Claims) for more information.

Here is how a claim report for serials may be generated in Alma analytics by shelving location:

ONE

Create a report in the physical items subject

TWO

Filter by your desired parameters, for example:

1. Filter by Physical Item Details Receiving date is NULL
	1. This means item did not arrive
2. Filter by Physical Item Details Expected Receiving Date is less than today, or 7 days ago, or however “late” of arrival you wish to retire. Here is example for “should have arrived at least 7 days ago”:

"Physical Item Details”. “Expected Receiving Date" <= timestampadd(sql\_tsi\_day,-7,current\_date)

	1. See blog with a wide variety of options at [Alma Analytics SQL Filter Examples](https://developers.exlibrisgroup.com/blog/alma-analytics-sql-filter-examples/)
3. Filter by the physical item details material type you use for serials, likely it is “issue”

Now you have your filters:



THREE

Display the fields you want to appear in the report.

For example

* The title from the “Bibliographic Details” folder
* The POL Reference from the “PO Line” Folder
* The vendor from the “PO Line” Folder
* The expected receiving Date from the “Physical Item Details” folder
* The enumeration A from the “Physical Item Details” folder
* The enumeration B from the “Physical Item Details” folder
* The item description from the “Physical Item Details” folder
* The permanent call number from the “Holdings Details” folder

For example:



**FOUR**

Switch to the criteria tab and in the results drag the columns to the order you want (for example by shelving location, expected receiving date, vendor, etc. If you want it organized by shelving location, then “Permanent Call Number” should be in the first column (or change the sort to be by “Permanent Call Number” regardless of where you put it). Now you have your results:

