POLs with no transactions in the Funds Expenditure subject area

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Introduction

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- Until now the Funds Transactions subject area included only POLs for which there was a fund transaction.

- As a result, POLs which did not have a transaction (for example those of acquisition method "Gift", "Exchange" or "Technical") were not reportable.

- As of the Sept. 2019 release all POLs are reportable, including those with no fund transaction.
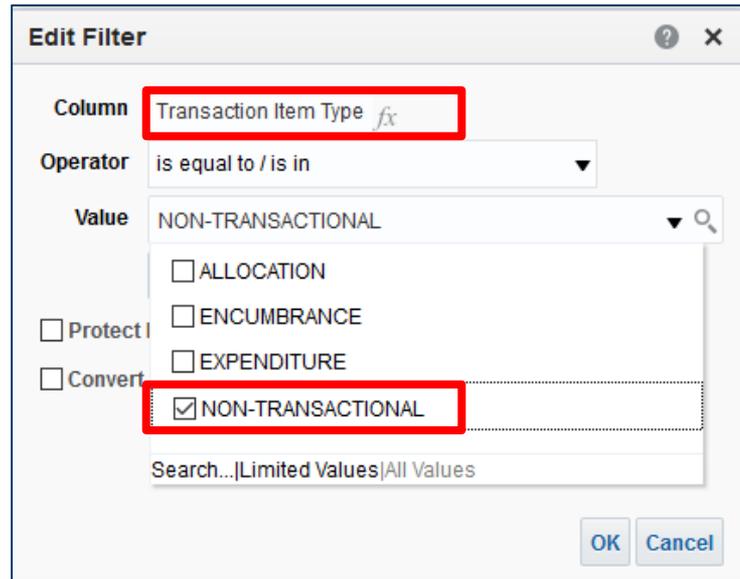
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Introduction

- As a result of this development institutions are now able to report on a full picture of all POLs, and track activities regardless of the existence of transactions.

- For example it is now possible to see

  - How many POLs of acquisition method "Gift" were received from which "Vendors" (donators) for a specific time period.

  - With which organizations was material exchanged via POLs of acquisition method "Exchange" and what was the material

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New Transaction Type "Non-Transactional"

New Transaction Type "Non-Transactional"

- In order to support this development a new transaction type called "Non Transactional" has been developed

New Transaction Type "Non-Transactional"

- When the Transaction Type = "Non-Transactional" the Transaction Amount will always be 0 and there will be no Transaction Date

Transaction Item Type	PO Line Creation Date	Transaction Amount	Transaction Date	PO Line Reference	Acquisition Method	Title
NON-TRANSACTIONAL	10/22/2018	0		POL-191258	GIFT	Athenaeum review.
	12/19/2018	0		POL-193564	TECHNICAL	ChemSystemsChem
	12/20/2018	0		POL-193583	TECHNICAL	Nature catalysis.
		0		POL-193584	TECHNICAL	Nature Sustainability
		0		POL-193585	TECHNICAL	Nature electronics.
	1/9/2019	0		POL-193797	TECHNICAL	Agricultural and resource economics review.
		0		POL-193798	TECHNICAL	AJIL unbound.
		0		POL-193799	TECHNICAL	Annals of glaciology
		0		POL-193800	TECHNICAL	BJPsych bulletin.
		0		POL-193801	TECHNICAL	BJPsych international.
		0		POL-193802	TECHNICAL	BJPsych open.

New Transaction Type "Non-Transactional"

- In addition a new measure has been create called "Number of POLs without transactions".

- The existing measure "Number of POLs" now includes those POLs with and without transactions.

- We will see an example using this new measure towards the end of this presentation.

New Transaction Type "Non-Transactional"

PO Line Quantity

PO Line Total Price

PO Line Pct

Number of POLs

Number of POLs of type Electronic Format

Number of POLs of type General Format

Number of POLs of type Physical Format

Number of POLs without transactions

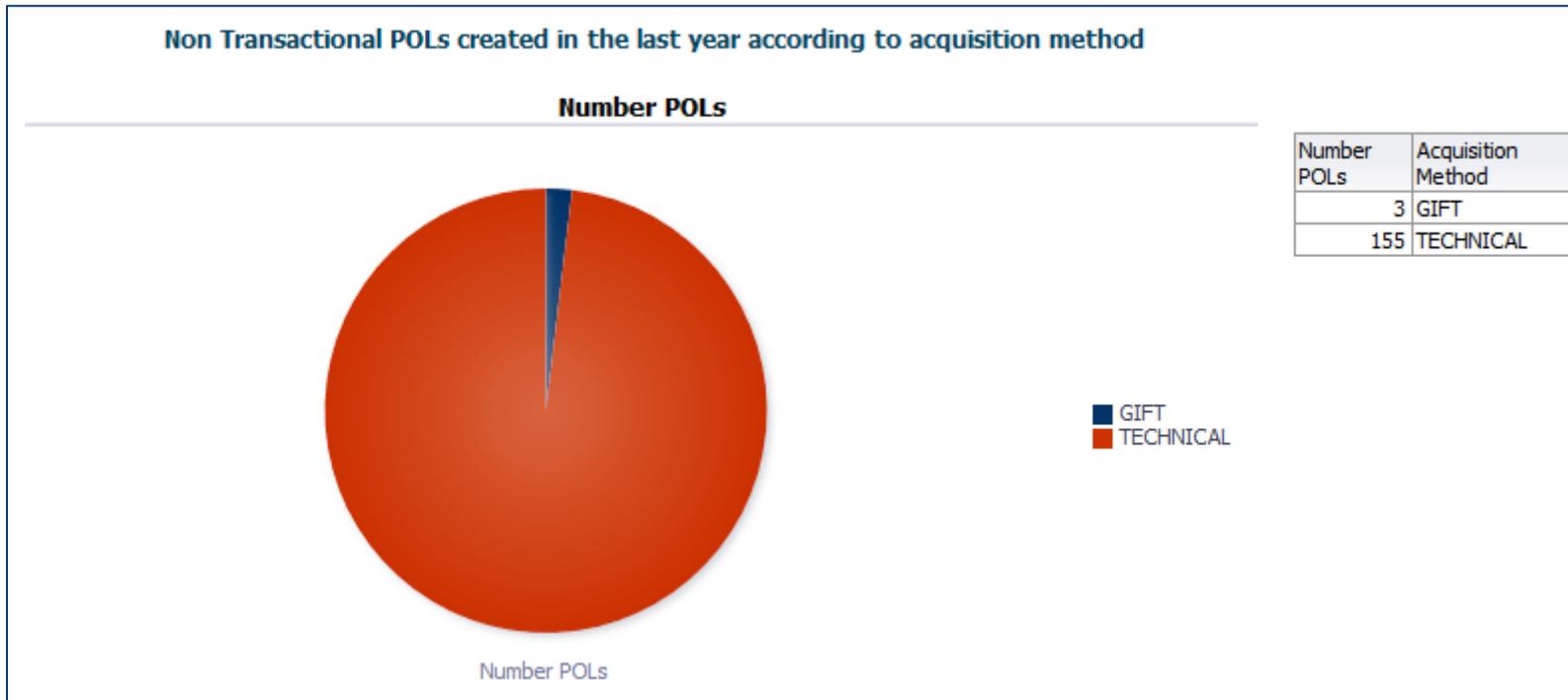These measures now include all POLs (with and without transactions)

This measure includes only POLs with no transaction
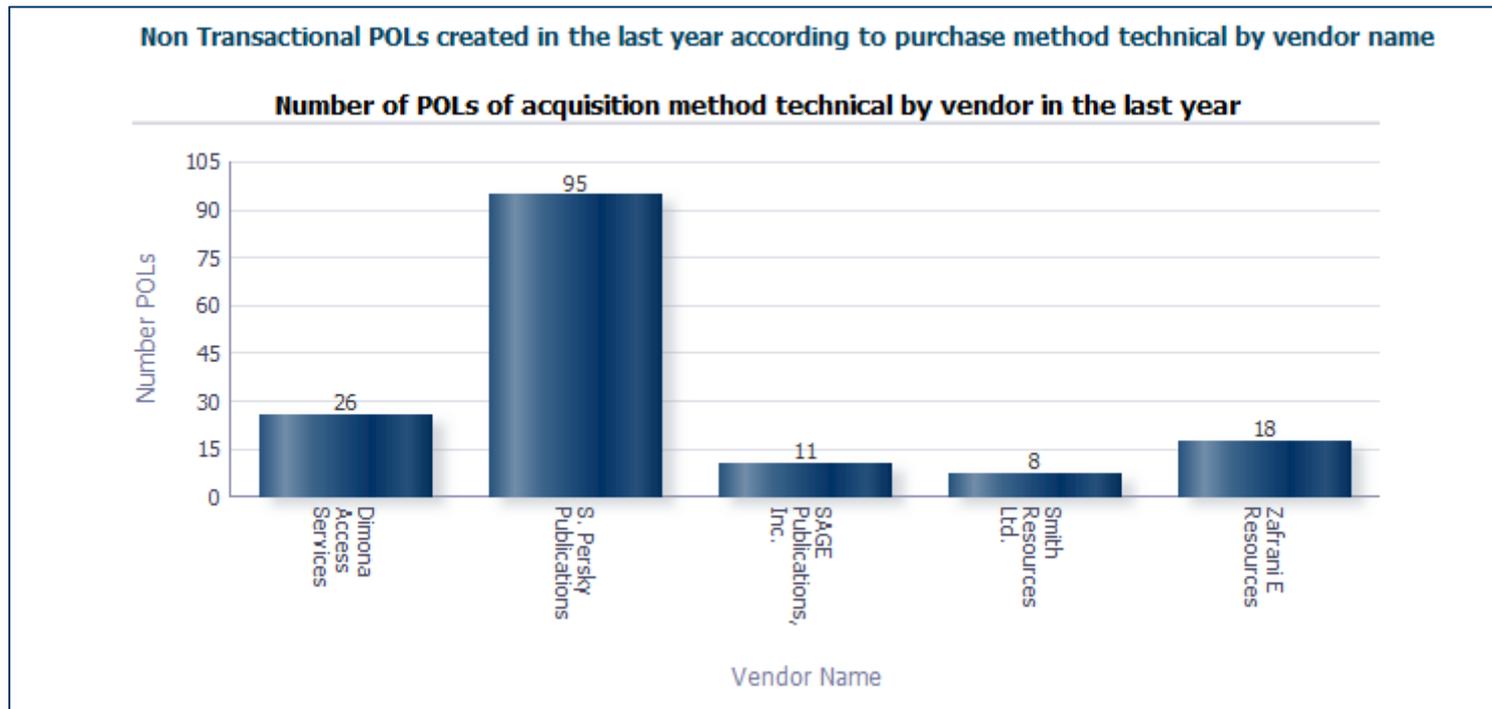
Sample reports

Sample reports

- Here the institution can see how many POLs were created of type "Non Transactional" in the last year according to acquisition method
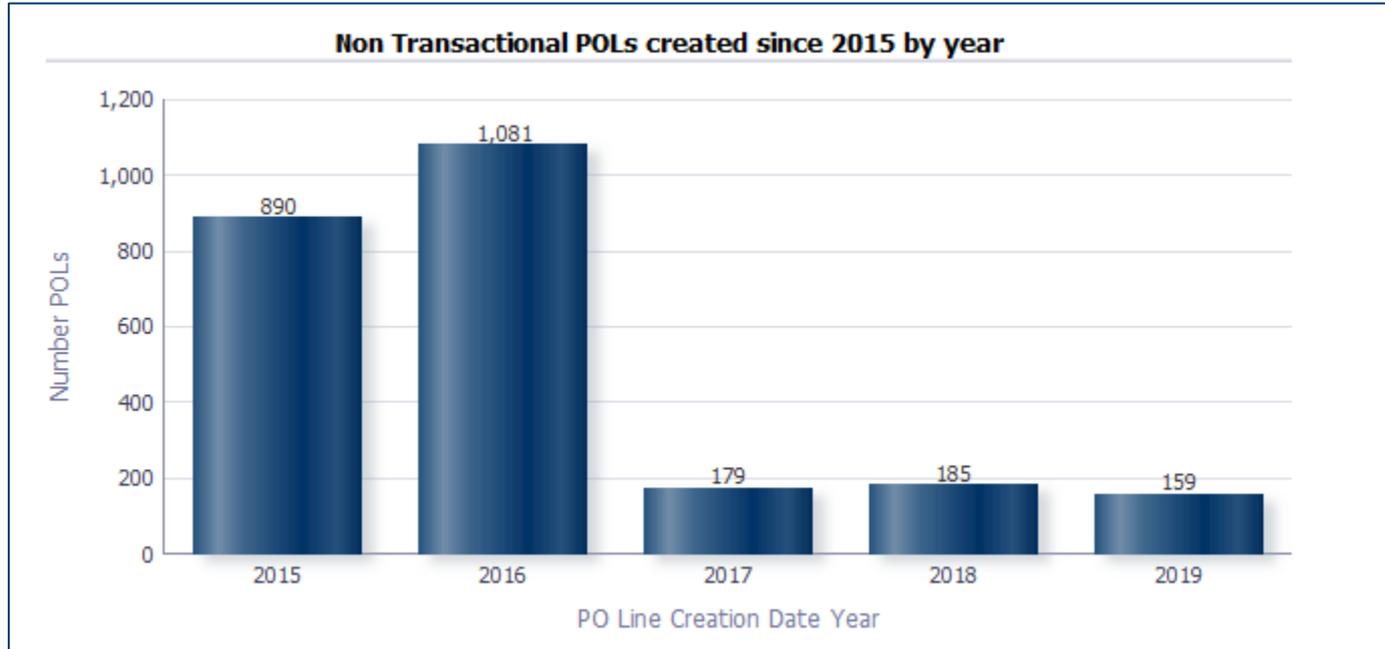

Non Transactional POLs created in the last year according to acquisition method

Number POLs

Number POLs	Acquisition Method
3	GIFT
155	TECHNICAL

GIFT
TECHNICAL

Number POLs

Sample reports

- Here the institution can see how many POLs were created of acquisition method "Technical" in the last year according to vendor

Non Transactional POLs created in the last year according to purchase method technical by vendor name

Number of POLs of acquisition method technical by vendor in the last year

Sample reports

- Here the institution can see how many POLs were created of type "Non Transactional" each year since 2015

Non Transactional POLs created since 2015 by year

Please note

Please note

- Existing Alma Analytics reports which do not have a filter by transaction type may now have more results than they previously did.

- This is because previously reports included POLs only of transaction types "Allocation", "Expenditure" and "Encumbrance".

- Now the reports also contain POLs of type "Non Transactional"

Please note

- For example in this case if a user had a report of POLs created in 2016 for LC Group "Literature (General)" then previously he or she would have 916 results. Now there will be another 17 results equaling 933 results.

Number of POLs for LC Group Literature (General) created in 2016

Transaction Item Type	Classification Code	Group 1	Number of POLs	PO Line Creation Date Year
ENCUMBRANCE	PN	Literature (General)	916	2016
EXPENDITURE	PN	Literature (General)	916	2016
NON-TRANSACTIONAL	PN	Literature (General)	17	2016

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Please note

- Here is the same report as the previous slide without the column "Transaction Item Type"

Number of POLs for LC Group Literature (General) created in 2016

Classification Code	Group 1	Number of POLs	PO Line Creation Date Year
PN	Literature (General)	933	2016

Please note

- The pre-made measure "Number of POLs" which already existed now includes POLs with and without transactions.
- The new measure "Number of POLs without transactions" includes only those POLs without transactions.

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Please note

- "Number of POLs" and "Number of POLs without transactions"

THANK YOU!

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