



4-26-2019

# Carpe Data with Alma Analytics

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## Repository Citation

Willemssen, Mary Ellen and Jones, Julene L., "Carpe Data with Alma Analytics" (2019). *Library Presentations*. 204.  
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# CARPE DATA

## WITH ALMA ANALYTICS

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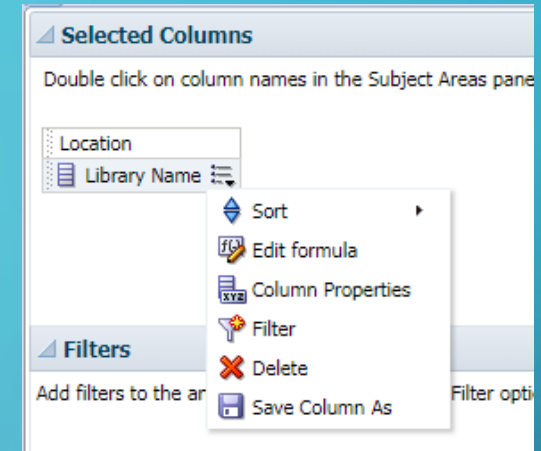
ELUNA 2019

# WHAT WE HOPE TO COVER:

- Filter columns
- Add, subtract, and create percentages with columns
- Filter by date (TIMESTAMPADD)
- Save a column to reuse later
- Concatenate data
- Work with pivot tables
- Create sub-totals and grand totals
- Repeat data in results
- Import results into Alma to create a set
- Tips

# FIELD CRITERIA

# ADDING CRITERIA TO YOUR FIELDS:



- Sort allows to sort Ascending, Descending, Add multiple sorts or delete sorts.
- Edit formula – allows you to manipulate the data using Functional processes.
- Column Properties allows you to change the properties of the columns.
- Filter lets you filter a field on the data that is contained in that field of type.
- Delete
- Save Column As lets you save a column that is has a formula that you use over and over and apply it to other Analysis.

# A COUPLE OF “HOUSE KEEPING” ITEMS

# ADD "LIFECYCLE" TO AVOID HAVING DELETED RECORD RETURNS IN YOUR RESULTS IF YOU ARE WORKING WITH BIB, HOLDING, OR ITEM ANALYSIS.

Barcode	Last Loan Date	Lifecycle	Bibliographic Lifecycle	Holding Lifecycle
		Active	In Repository	Active
		Deleted	Deleted	Deleted
			In Repository	Active
				Deleted
		None	In Repository	Active
	9/1/2002 3:59:00 AM	Deleted	Deleted	Deleted
00099003285428	12/2/2018 6:28:55 PM	Active	In Repository	Active
00099002860197		Active	In Repository	Active
00099003123033		Active	In Repository	Active
00099000484776		Active	In Repository	Active
00099000484743		Active	In Repository	Active
00099000484800		Active	In Repository	Active

Physical Item Details | Bibliographic Details | Holding Details

Barcode | Last Loan Date | Lifecycle | Bibliographic Lifecycle | Holding Lifecycle

- Sort
- Edit formula
- Column Properties
- Filter
- Delete
- Save Column As

Filters

Add filter to the analysis criteria by clicking on Filter option for the specific column in the table.

- Lifecycle is equal to / is in Active
- AND Bibliographic Lifecycle is equal to / is in In Repository
- AND Holding Lifecycle is equal to / is in Active

Barcode	Last Loan Date	Lifecycle	Bibliographic Lifecycle	Holding Lifecycle
		Active	In Repository	Active
00099003285428	12/2/2018 6:28:55 PM	Active	In Repository	Active
00099002860197		Active	In Repository	Active
00099003123033		Active	In Repository	Active
00099000484776		Active	In Repository	Active
00099000484743		Active	In Repository	Active
00099000484800		Active	In Repository	Active
00099001134420		Active	In Repository	Active
00099003240472		Active	In Repository	Active
00099003240480		Active	In Repository	Active

# COMMON FILTERS IN THE PHYSICAL ITEMS SUBJECT AREA

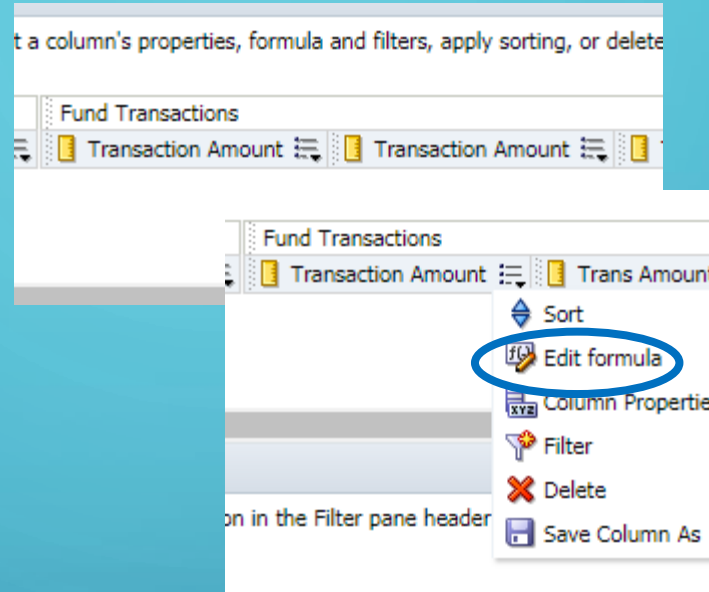
- Exclude Bibs that are suppressed from discovery
- Exclude Holdings are suppressed from discovery
- Exclude Physical Item Details / Lifecycle is deleted
- Include Physical Item Details / Process type is none (or perhaps Exclude those that have Missing, Lost, Lost Resource Sharing, Lost and Paid, Acquisition, Technical-Migration, Loan, etc. Process types)



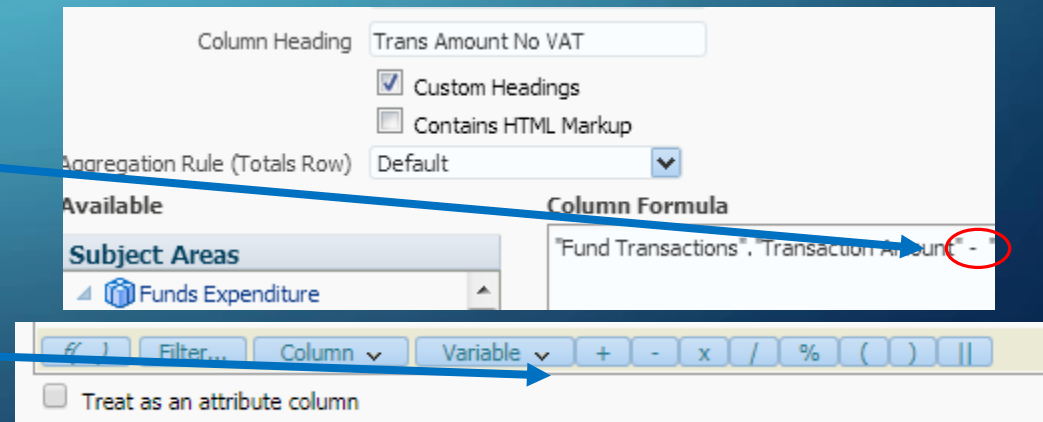
# ADDING, SUBTRACTING, AND PERCENTAGES

# ADDING OR SUBTRACTING ONE FIELD TO/FROM ANOTHER

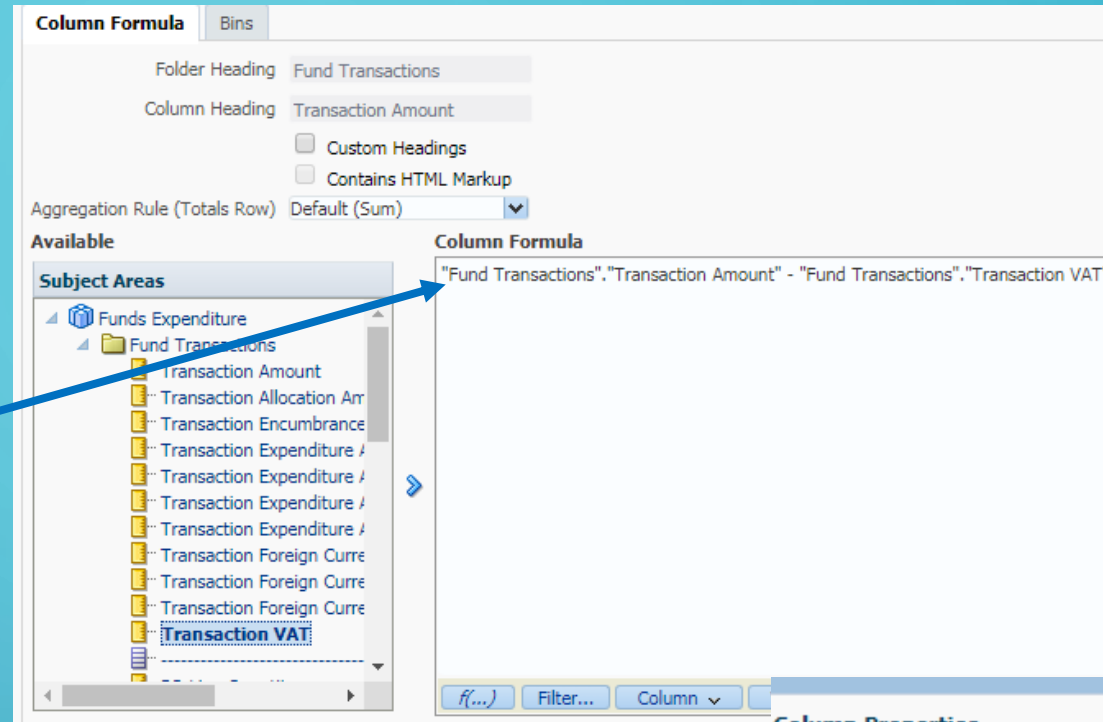
- Add the field you will be subtracting from twice. In this case, the “Transaction Amount” from the “Fund Transactions” Subject Area.
- Go to Edit formula in the drop down of one of those fields and add a minus sign after the dimension and field.
- You can use your keyboard or use the symbols in the tray.



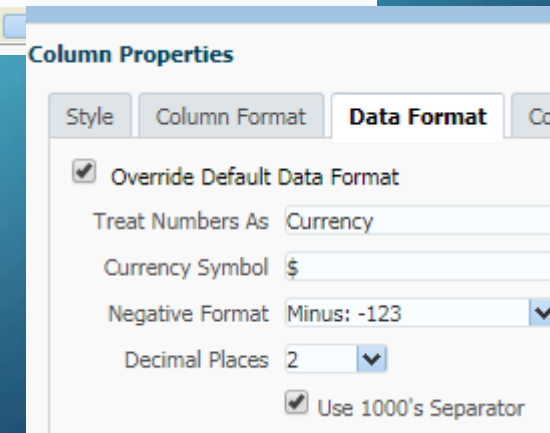
One of these “Transaction Amount” columns I will leave as it is, the other will be used for our formula.



- Then add the field you wish to subtract from the Subject Area list to the left.
- It will look something like this: "Fund Transactions"."Transaction Amount" - "Fund Transactions"."Transaction VAT".
- I rename my column so it makes more sense.
- **REMEMBER** – these must be numeric fields.



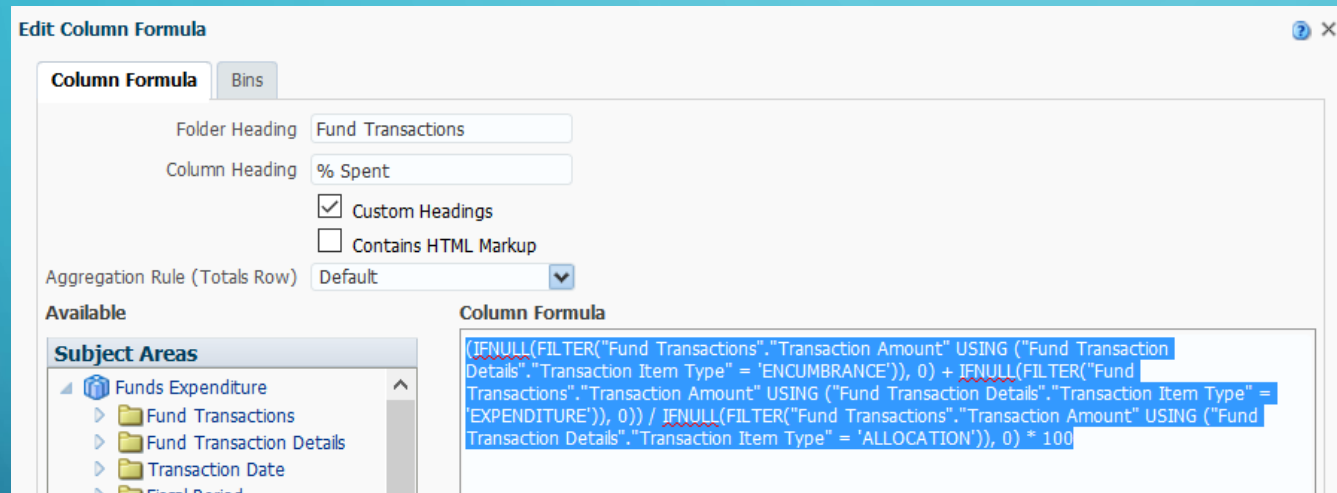
- I also used the Column Properties>Data format editor to change my numbers to currency.



# PERCENTAGES

Use the same general idea as on last 2 slides, in this example in the Fund Transactions folder:

Concept:  $((\text{Encumbrance} + \text{Expenditure}) / \text{Allocation}) * 100$



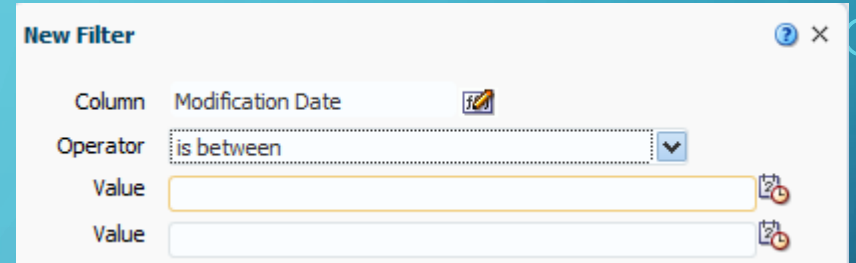
Also change the Column Properties / Data Format to be "Percentage"

Formula:  $(\text{IFNULL}(\text{FILTER}(\text{'Fund Transactions'}. \text{'Transaction Amount'} \text{ USING } (\text{'Fund Transaction Details'}. \text{'Transaction Item Type'} = \text{'ENCUMBRANCE'})), 0) + \text{IFNULL}(\text{FILTER}(\text{'Fund Transactions'}. \text{'Transaction Amount'} \text{ USING } (\text{'Fund Transaction Details'}. \text{'Transaction Item Type'} = \text{'EXPENDITURE'})), 0)) / \text{IFNULL}(\text{FILTER}(\text{'Fund Transactions'}. \text{'Transaction Amount'} \text{ USING } (\text{'Fund Transaction Details'}. \text{'Transaction Item Type'} = \text{'ALLOCATION'})), 0) * 100$



# FILTER BY DATE

# DATES

- Can filter for actions occurring between 2 given dates:



The screenshot shows a 'New Filter' dialog box with the following fields:

Column	Modification Date	
Operator	is between 	
Value	<input type="text"/>	
Value	<input type="text"/>	

- Can also filter for actions occurring based on [TODAY] using TIMESTAMPADD filter:
  - `TIMESTAMPADD(SQL_TSI_YEAR, 3, CURRENT_DATE)`: 3 years in the future
  - `TIMESTAMPADD(SQL_TSI_MONTH, -4, CURRENT_DATE)`: 4 months ago
  - `TIMESTAMPADD(SQL_TSI_WEEK, -5, CURRENT_DATE)`: 5 weeks ago
  - `TIMESTAMPADD(SQL_TSI_DAY, 6, CURRENT_DATE)`: 6 days in the future

# EXAMPLE: USE TIMESTAMPADD FILTER TO FIND “CREATIVE” DUE DATES

First, find what is currently on loan

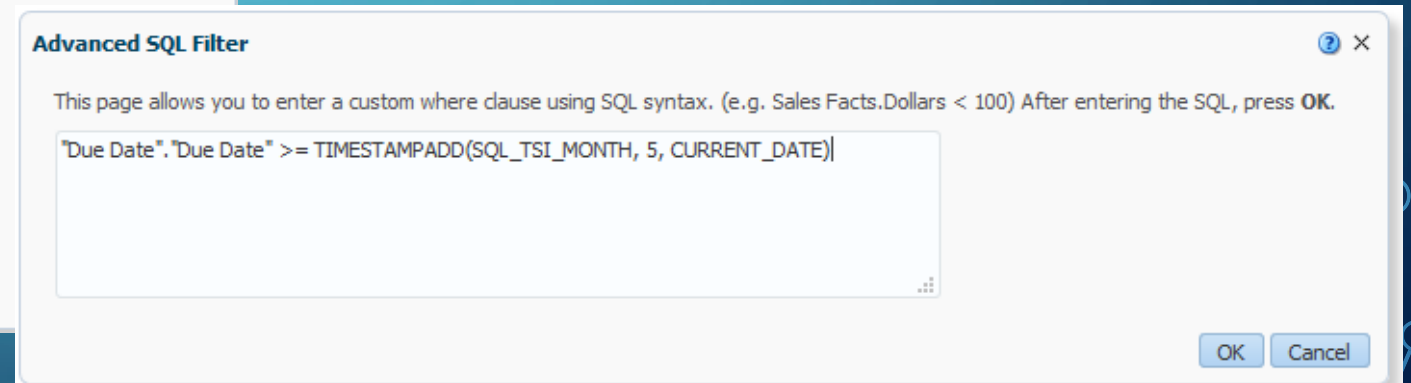
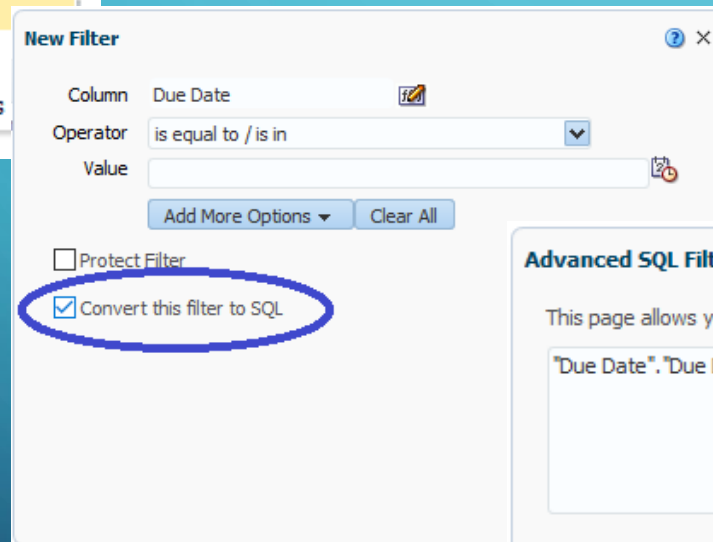
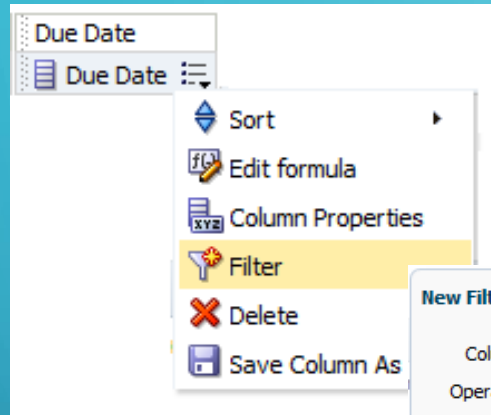
The screenshot shows a data analysis tool interface with the following components:

- Criteria** tab selected, with sub-tabs for Results, Prompts, and Advanced.
- Subject Areas** pane on the left, expanded to show a tree structure under **Fulfillment**, including folders like Loan, Loan Details, Loan Policy, Loan Circulation Desk, Return Circulation Desk, Loan Date, Due Date, Return Date, Renewal Date, Last Renewal Date, LC Classifications, Dewey Classifications, Item Location at time of loan, Bibliographic Details, Patron Detail, Borrower Details, Preferred Contact Information, and Loan Operator Details.
- Selected Columns** pane on the right, containing a table of columns: Item Location at time of loan, Due Date, Physical Item Details, and Bibliographic Details. Below these are specific columns: Library Name, Location Code, Due Date, Barcode, COUNT(DISTINCT Item Id), Process Type, and Title.
- Filters** pane at the bottom, containing a single filter: `Process Type is equal to /is in Loan;`

# ADD TIMESTAMPADD FILTER

Add a filter based on the current date + 5 months

`TIMESTAMPADD(SQL_TSI_MONTH, 5, CURRENT_DATE)`





# NOW HAVE: ITEMS ON LOAN DUE 5 OR MORE MONTHS FROM [DATE REPORT IS RUN]

items on loan with creative due dates Final analysis

Criteria Results Prompts Advanced

Subject Areas

- Fulfillment
  - Loan
  - Loan Details
  - Loan Policy
  - Loan Circulation Desk
  - Return Circulation Desk
  - Loan Date
  - Due Date
  - Return Date
  - Renewal Date
  - Last Renewal Date
  - LC Classifications
  - Dewey Classifications
  - Item Location at time of loan
  - Bibliographic Details
  - Patron Detail
  - Borrower Details
  - Preferred Contact Information
  - Loan Operator Details

Selected Columns

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 f

Item Location at time of loan	Due Date	Physical Item Details	Bibliographic Details
Library Name	Location Code	Due Date	Barcode
		COUNT(DISTINCT Item Id)	Process Type
			Title

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 sa

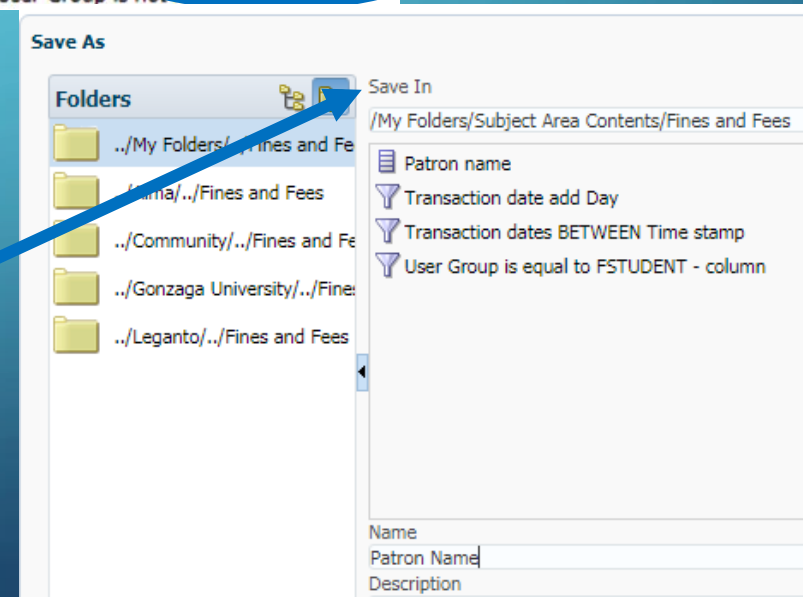
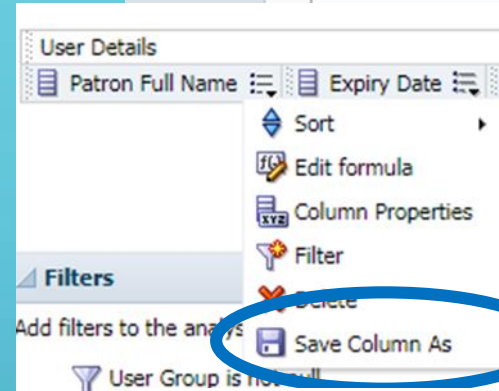
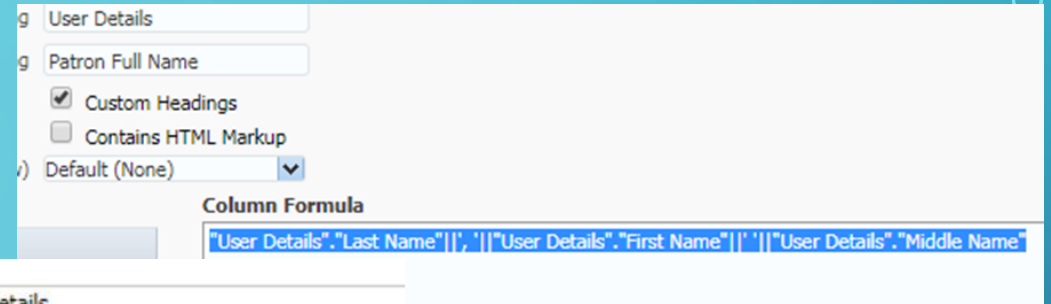
Process Type is equal to / is in Loan;

**AND** Due Date, "Due Date" >= TIMESTAMPADD(SQL\_TSI\_MONTH, 5, CURRENT\_DATE)

# SAVE COLUMN AS

# USING “SAVE COLUMN AS”

- In a new analysis, add and edit the column *using a formula*.
- Or open a analysis that contains the field and the formula you want to reuse.
- Click on the column drop down menu and choose : “Save Column As”.
- Pay attention to where your column is being saved and remember you will only be able to reuse the column in analysis with those fields.



# Now you've created your reusable field – how do you reuse it?

Start by creating a new analysis (or you may also add these to an existing analysis).

In the left hand pane, you will see the “Catalog” area with the tree of available catalogs.

Find your column, and double click or drag it to your analysis.

That's it! So simple.

The screenshot displays a software interface with a catalog tree on the left and a compound layout window on the right. The catalog tree shows a hierarchy of folders: Users, Preferred Contact Information, Address, Phone Number, Email, Identifier, Block, Role, Campus Details, Note, Statistics, and Institution. The Institution folder is expanded, showing 'Institution Code' and 'Institution Name'. The 'Catalog' pane at the bottom shows a list of folders: My Folders, Subject Area Contents, Users, My Dashboard, my reports, Samples for Presentation, tech sem, and Shared Folders. The 'Users' folder is expanded, showing 'Patron Whole Name'. The compound layout window has a title 'Reuse Patron Whole Name' and a table with the following data:

User Group	Patron Whole Name
FSTUDENT	Abalahin, Kimberly
	Abba-Gaston, Mary-Lee
	Abbate, Sabrina
	Abbo, Gifti
	Abbott, Andrew
	Abbott, Tess

# FORMULA EXAMPLES:

852 formula to get only the i and h subfields:

```
CONCAT(REPLACE(Evaluate('regexp_substr(%1,"\$\$h[^\$]+", 1,1)',"Holding Details"."852 MARC"), '$$h ', ''), REPLACE(Evaluate('regexp_substr(%1,"\$\$i[^\$]+", 1,1)',"Holding Details"."852 MARC"), '$$i ', ''))
```

Date formulas:

Example 1:

```
FILTER("Usage Data Details"."JR1 - Journal Usage Counter (total)" USING ("Usage Date"."Usage Date" >= TIMESTAMPADD(SQL_TSI_WEEK, -5, CURRENT_DATE)))
```

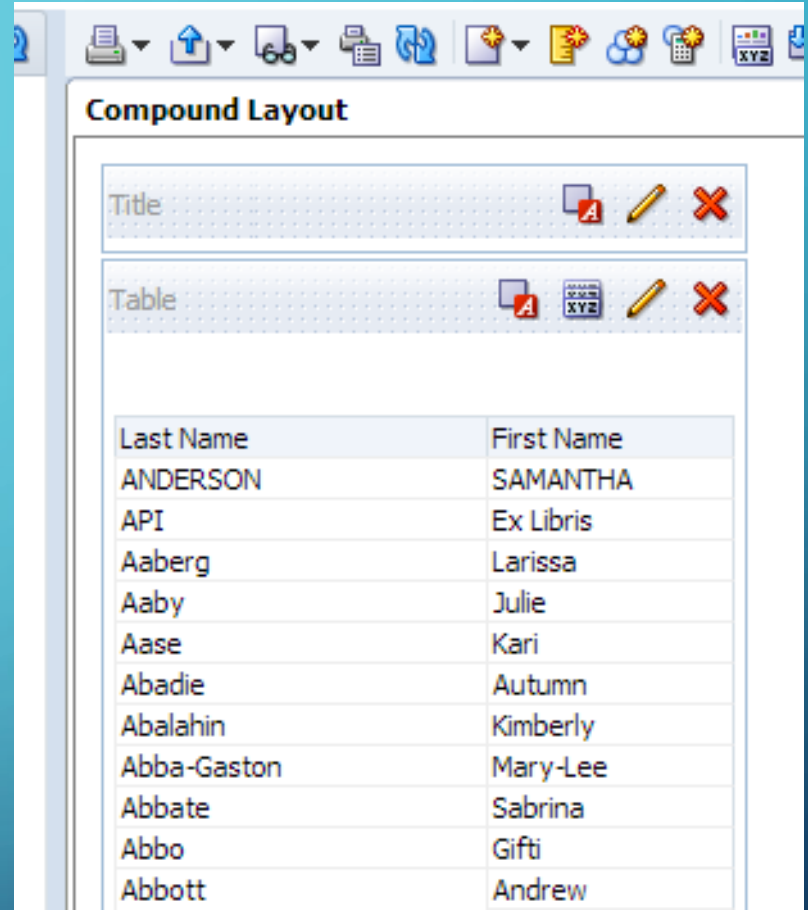
Example 2:

```
FILTER("Loan"."Loans (Not In House)" USING ("Fulfillment"."Loan Date"."Loan Date" >= TIMESTAMPADD(SQL_TSI_YEAR, -1, CURRENT_DATE)))
```

# CONCATENATION

# CONCATENATING MULTIPLE FIELDS

- You want to combine two fields such as the patron first and last name.
- Add one of the columns you want to concatenate
- Click on the drop down and choose “Edit Formula”



The screenshot shows a software interface window titled "Compound Layout". At the top, there is a toolbar with various icons. Below the toolbar, there are two sections: "Title" and "Table". The "Table" section contains a table with two columns: "Last Name" and "First Name". The table data is as follows:

Last Name	First Name
ANDERSON	SAMANTHA
API	Ex Libris
Aaberg	Larissa
Aaby	Julie
Aase	Kari
Abadie	Autumn
Abalahin	Kimberly
Abba-Gaston	Mary-Lee
Abbate	Sabrina
Abbo	Gifti
Abbott	Andrew

EDIT THE FORMULA TO LOOK LIKE THIS:

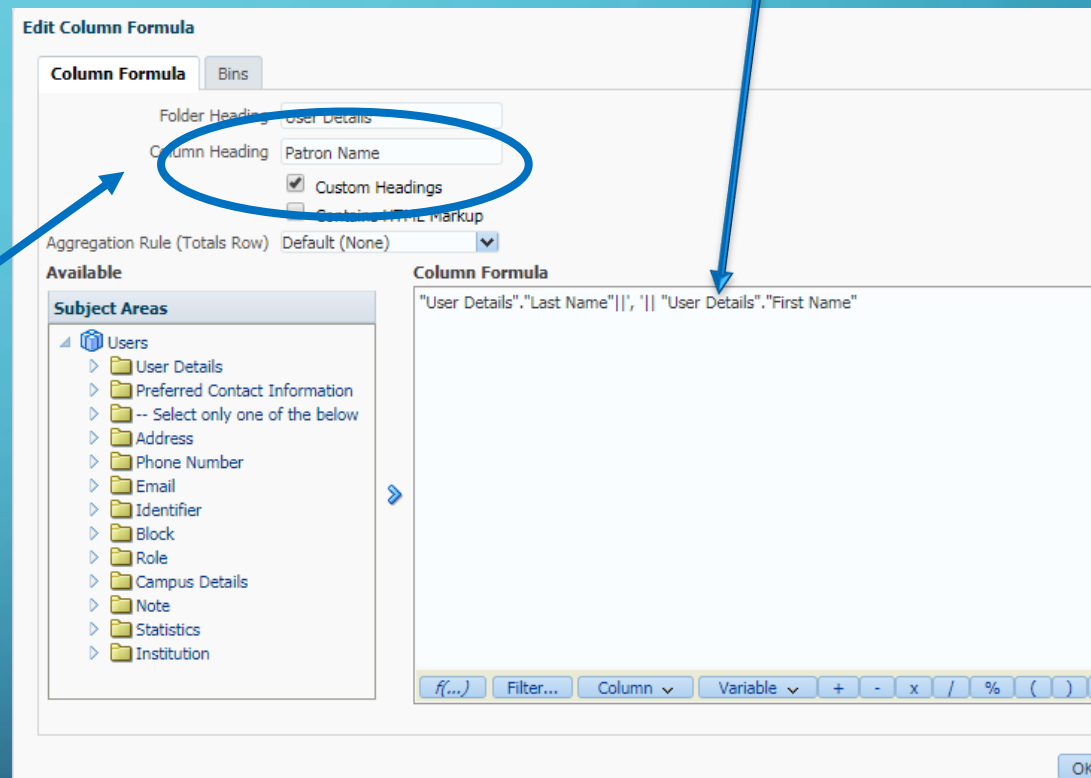
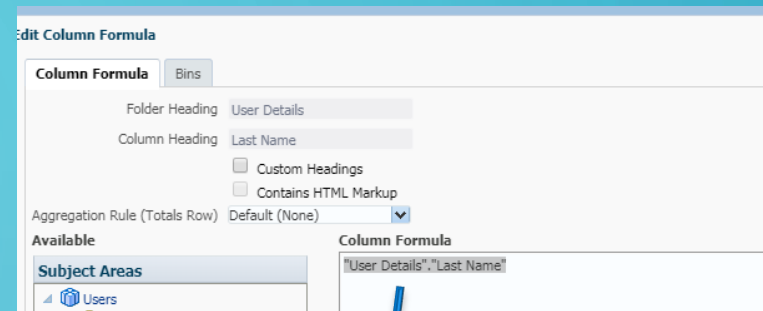
"User Details"."Last Name" || ', ' || "User Details"."First Name" (NOTE: if you don't have a space or a dash, it will butt the two fields together)

This format also works if you want to add text to a field for instance "Bibliographic Details"."ISBN" | | '-13'

Click the Custom Heading box and change the Column Heading name to "Patron Name"

Click OK.

If you get a syntax error at this point, make sure that you have only single quotes around your comma and space, double quotes around the dimensions and fields. Also, make sure you have two pipes between each segment.





# USING PIVOT TABLES

# JOURNAL USAGE COUNTS THAT ARE GREATER THAN 500 PER MULTIPLE YEARS

**Selected Columns**

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...

Subscriber	Usage Date	Usage Date Details
Subscriber	Usage Date Year	Usage Date Month
	Usage Date Month Key	JR1 - Journal Usage Counter (total)

**Filters**

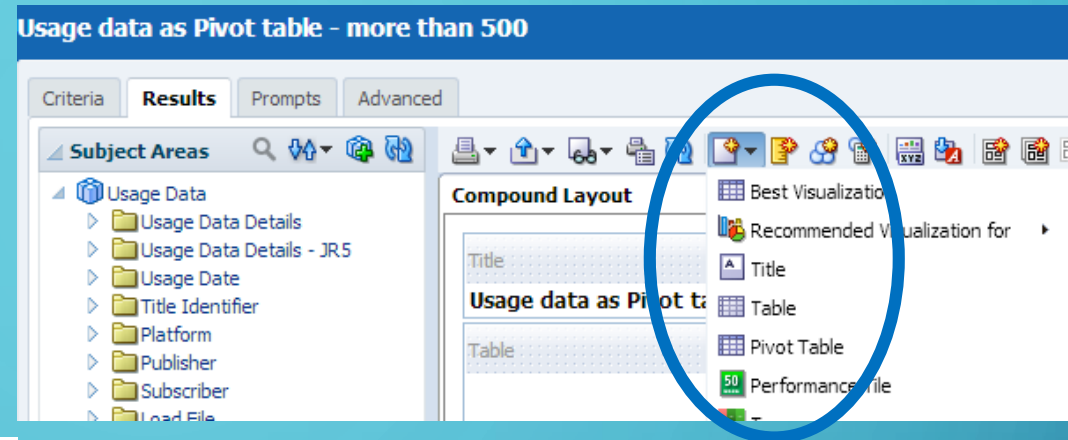
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane.

- JR1 - Journal Usage Counter (total) is greater than or equal to 500
- AND Usage Date Year is equal to / is in 2015; 2016; 2017; 2018
- AND Subscriber is equal to / is in Alexander Street Press; Ebsco; Elsevier; Films on Demand; IEEE Standards; JSTOR; Kanopy Streaming

Subscriber	Usage Date Year	Usage Date Month	JR1 - Journal Usage Counter (total)
Ebsco	2016	January	9,494
	2017	January	5,513
	2018	January	6,061
Elsevier	2018	January	574
IEEE Standards	2016	January	1,311
JSTOR	2015	January	2,240
	2016	January	2,354
	2017	January	1,059
Ebsco	2018	January	1,998
	2016	February	15,075
	2017	February	12,391
Elsevier	2018	February	11,592
	2016	February	681
	2017	February	828
JSTOR	2018	February	984
	2015	February	4,292
	2016	February	4,036
Ebsco	2017	February	2,776
	2018	February	3,666
	2016	March	15,231

Here are the results

YOU CAN TURN IT INTO A PIVOT TABLE:



Compound Layout

Title

Usage data as Pivot table - more than 500

Pivot Table

		JR 1 - Journal Usage Counter (total)				
Subscriber	Usage Date Month	2015	2016	2017	2018	
Ebsco	January		9,494	5,513	6,061	
	February		15,075	12,391	11,592	
	March		15,271	13,621	12,265	
	April	17,366	19,075	18,192	19,245	
	May	9,538	8,606	8,357	8,383	
	June	9,913	8,313	6,917	6,163	
	July	7,191	6,403	6,071	6,107	
	August	2,776	2,149	2,462	2,983	
	September	15,894	14,796	13,472	12,054	
	October	18,446	16,467	16,101	20,061	
	November	18,868	18,559	16,774	18,308	
	December	10,923	10,085	7,904	9,524	
Elsevier	January				574	
	February		681	828	984	
	March			931	1,114	
	April		873	979	1,338	
	May			611	751	
	September			760	623	766
	October		508	734	965	1,067
	November		532	769	894	1,174
	December			532	591	661
	IEEE Standards	January		1,311		
		May				610
	JSTOR	January	2,240	2,354	1,059	1,998

- You may want to change my header columns or add totals to sections or add grand totals to everything.

# MOVING RESULTS AROUND

- To move your columns around, click on the “edit” pencil in the pivot table section of your report. That will open your Layout configuration at the bottom of your screen.

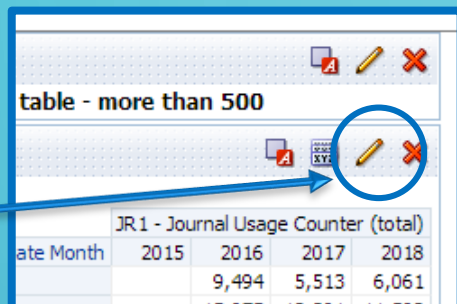
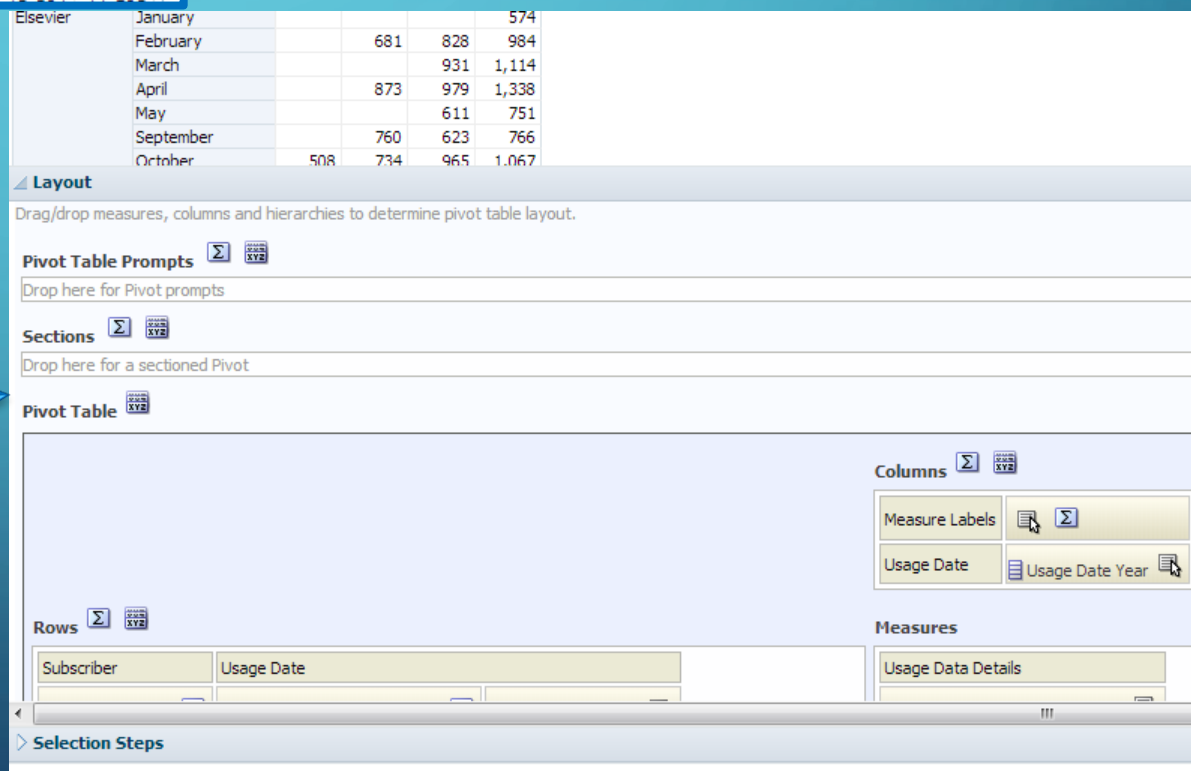


table - more than 500



ate Month	2015	2016	2017	2018
		9,494	5,513	6,061







Elsevier







January	February	March	April	May	September	October											
574	681	828	984	931	1,114	873	979	1,338	611	751	760	623	766	508	734	965	1,067



**Layout**  
Drag/drop measures, columns and hierarchies to determine pivot table layout.

**Pivot Table Prompts**    
Drop here for Pivot prompts

**Sections**    
Drop here for a sectioned Pivot

**Pivot Table**  

**Columns**    
Measure Labels    
Usage Date  Usage Date Year 

**Rows**    
Subscriber Usage Date

**Measures**  
Usage Data Details

**Selection Steps**

# MOVE FIELDS YOU WOULD LIKE AS COLUMN HEADINGS TO THE “COLUMNS” BOX

**Columns**

- Measure Labels
- Usage Date

**Rows**

- Subscriber
- Usage Date
- Subscriber
- Usage Date Month Key
- Usage Date Month

**Measures**

- Usage Data Details
- JR 1 - Journal Usage Counter...

**Columns**

- Measure Labels
- Usage Date Month Key
- Usage Date Month
- Usage Date Year

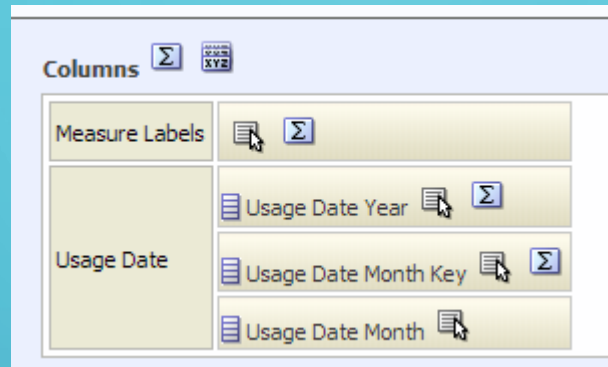
**Measures**

- Usage Data Details
- JR 1 - Journal Usage Counter...

- Again, you will be able to see your changes in “preview”,

JR 1 - Journal Usage Counter (total)														
Subscriber	January 2015	January 2016	January 2017	January 2018	February 2015	February 2016	February 2017	February 2018	March 2015	March 2016	March 2017	March 2018	April 2015	April 2016
Ebsco		9,494	5,513	6,061		15,075	12,391	11,592		15,271	13,621	12,265	17,366	19,011
Elsevier				574		681	828	984			931	1,114		811
IEEE Standards		1,311												
JSTOR	2,240	2,354	1,059	1,998	4,292	4,036	2,776	3,666	4,471	4,471	4,021	3,743	6,282	7,111

- Here are the results of moving the year above the month.



JR1 - Journal Usage Counter (total)												
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
Subscriber	January	February	March	April	May	June	July	August	September	October	November	December
Ebsco				17,366	9,538	9,913	7,191	2,776	15,894	18,446	18,868	10,92
Elsevier										508	532	
IEEE Standards												
JSTOR	2,240	4,292	4,471	6,282	3,151	1,702	1,985	775	3,598	4,811	5,104	4,26

# PLAY AROUND WITH THE FIELDS TO SEE WHICH OPTION GIVES YOU THE BEST RESULTS

- Moving the year to the rows gives you a new look. You may also change the order of the rows. **When you are happy, be sure and click the “Done” button on the top right of your screen.**

The screenshot shows the Tableau interface with the following configuration:

- Columns:** Usage Date Month Key, Usage Date Month
- Rows:** Usage Date Year, Subscriber
- Measures:** JR1 - Journal Usage Counter...

Usage Date Year	Subscriber	January	February	March	April	May	June	July	August	September	October	November	December
2015	Ebsco				17,366	9,538	9,913	7,191	2,776	15,894	18,446	18,868	10,923
2015	Elsevier										508	532	
2015	JSTOR	2,240	4,292	4,471	6,282	3,151	1,702	1,985	775	3,598	4,811	5,104	4,263
2016	Ebsco	9,494	15,075	15,271	19,075	8,606	8,313	6,403	2,149	14,796	16,467	18,559	10,085
2016	Elsevier		681		873					760	734	769	532
2016	IEEE Standards	1,311											
2016	JSTOR	2,354	4,036	4,471	7,129	2,753	1,704	1,312	539	2,062	4,374	5,076	3,379
2017	Ebsco	5,513	12,391	13,621	18,192	8,357	6,917	6,071	2,462	13,472	16,101	16,774	7,904
2017	Elsevier		828	931	979	611				623	965	894	591
2017	IEEE Standards					610							
2017	JSTOR	1,059	2,776	4,021	6,861	3,907	1,177	1,596	813	3,033	5,226	5,779	3,880
2018	Ebsco	6,061	11,592	12,265	19,245	8,383	6,163	6,107	2,983	12,054	20,061	18,308	9,524
2018	Elsevier	574	984	1,114	1,338	751				766	1,067	1,174	661
2018	JSTOR	1,998	3,666	3,743	6,889	4,127	1,349	1,909	818	3,318	5,545	6,884	4,398

The screenshot shows the bottom right corner of the Tableau interface with the text "Editing from: 'Compound Layout'" and two buttons: "Done" and "Revert". A blue arrow points from the text in the list above to the "Done" button.

# SUB-TOTALS AND GRAND TOTALS

- Right click on a column you want to total
- Choose “Show Row level Grand Total” and “After Values”
- You’ll get a grand total at the bottom.
- You can also click on a specific area to get sub-totals.

Subscriber	Usage Date Year	Usage Date Month	JR1 - Journal Usage Counter
JSTOR	2018	December	661
	2015	December	4,263
	2016	December	3,379
	2017	December	3,880
	2018	December	4,398
<b>Grand Total</b>			<b>704,525</b>

Subscriber	Usage Date Year	Usage Date Month	JR1 - Journal Usage Counter (total)
Ebsco	2016	January	9,494
	2017	January	5,513
	2018	January	6,061
<b>Ebsco Total</b>			<b>21,068</b>



# YOU HAVE LOTS OF OPTIONS ON A PIVOT TABLE

- Click the “edit” pencil.
- If you want a row total click the sigma in the columns section.
- You can also add totals after each section with a sigma

The screenshot shows the PivotTable task pane with the following configuration:

- Rows:** Subscriber, Usage Date
- Columns:** Subscriber, Usage Date Month Key, Usage Date Month
- Measures:** JR1 - Journal Usage Counter...

The sigma icon in the Columns section is highlighted with a blue arrow.

Subscriber	Usage Date Month	JR1 - Journal Usage Counter (total)			
		2015	2016	2017	2018
Ebsco	January	9,494	5,513	6,061	
	February	15,075	12,391	11,592	
	March	15,271	13,621	12,265	
	April	17,366	19,075	18,192	19,245
	May	9,538	8,606	8,357	8,383
	June	9,913	8,313	6,917	6,163
	July	7,191	6,403	6,071	6,107
	August	2,776	2,149	2,462	2,983
	September	15,894	14,796	13,472	12,054
	October	18,446	16,467	16,101	20,061
	November	18,868	18,559	16,774	18,308
	December	10,923	10,085	7,904	9,524
Elsevier	January				574

Subscriber	Usage Date Month	JR1 - Journal Usage Counter (total)				JR1 - Journal Usage Counter (total) Total
		2015	2016	2017	2018	
Ebsco	January	9,494	5,513	6,061		21,068
	February	15,075	12,391	11,592		39,058
	March	15,271	13,621	12,265		41,157
	April	17,366	19,075	18,192	19,245	73,878
	May	9,538	8,606	8,357	8,383	34,884
	June	9,913	8,313	6,917	6,163	31,306
	July	7,191	6,403	6,071	6,107	25,772
	August	2,776	2,149	2,462	2,983	10,370
	September	15,894	14,796	13,472	12,054	56,216
	October	18,446	16,467	16,101	20,061	71,075
	November	18,868	18,559	16,774	18,308	72,509
	December	10,923	10,085	7,904	9,524	38,436
<b>Ebsco Total</b>		<b>110,915</b>	<b>144,293</b>	<b>127,775</b>	<b>132,746</b>	<b>515,729</b>
Elsevier	January				574	574
	February		681	828	984	2,493
	March		831	1,114	1,114	3,059

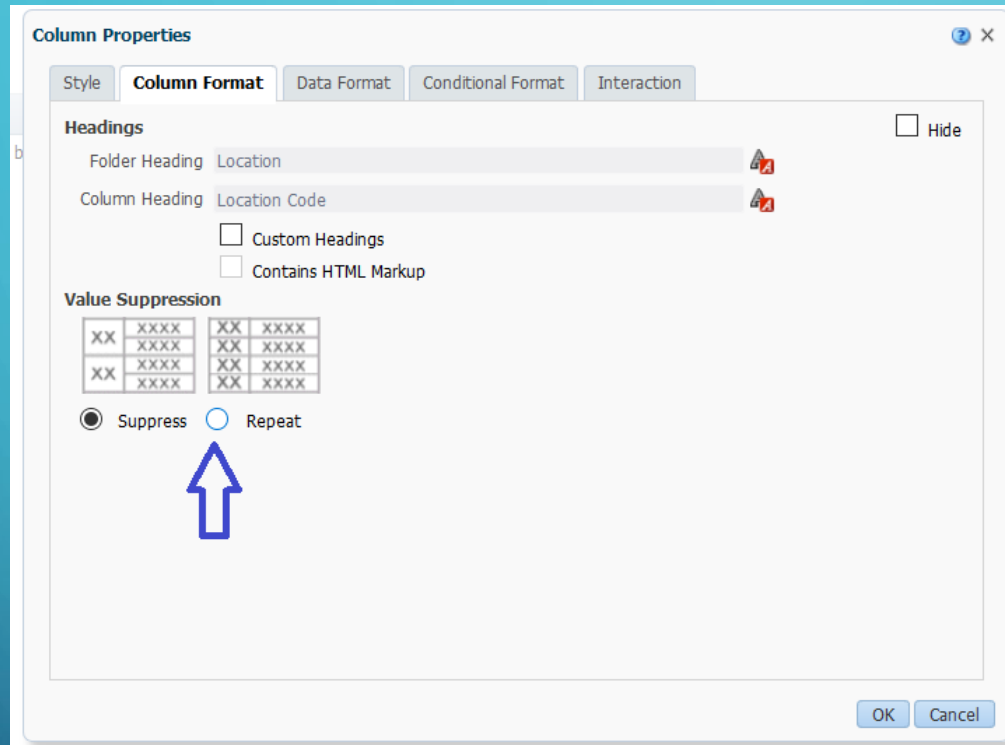
Subscriber	Usage Date Month	JR1 - Journal Usage Counter (total)				JR1 - Journal Usage Counter (total) Total
		2015	2016	2017	2018	
Ebsco	January	9,494	5,513	6,061		21,068
	February	15,075	12,391	11,592		39,058
	March	15,271	13,621	12,265		41,157
	April	17,366	19,075	18,192	19,245	73,878
	May	9,538	8,606	8,357	8,383	34,884
	June	9,913	8,313	6,917	6,163	31,306
	July	7,191	6,403	6,071	6,107	25,772
	August	2,776	2,149	2,462	2,983	10,370
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	November	18,868	18,559	16,774	18,308	72,509
	December	10,923	10,085	7,904	9,524	38,436
<b>Ebsco Total</b>		<b>110,915</b>	<b>144,293</b>	<b>127,775</b>	<b>132,746</b>	<b>515,729</b>
Elsevier	January				574	574
	February		681	828	984	2,493
	March		831	1,114	1,114	3,059

# REPEATING DATA

# WHAT IF YOU WANT YOUR DATA TO REPEAT?

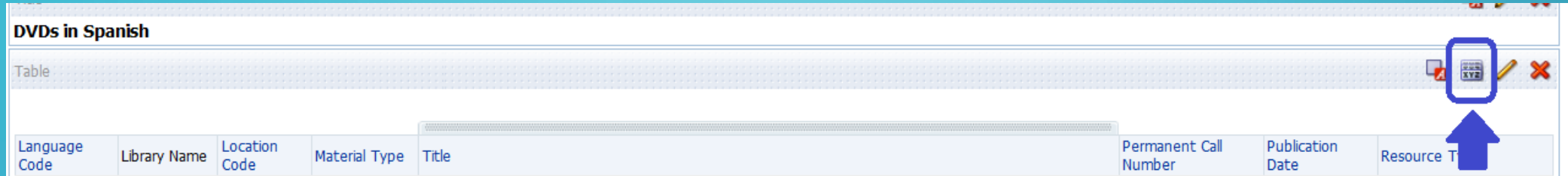
DVDs in Spanish								
Language Code	Library Name	Location Code	Material Type	Title	Permanent Call Number	Publication Date	Resource Type	
spa	Fine Arts Library	famctr	DVD	El dúo de "La africana" /	DVD1322	©2006.	Projected medium - Physical	
				La Dolores /	DVD1320	©2006.	Projected medium - Physical	
				Madriñeña bonita : homenaje a la mujer Madriñeña en la zarzuela, 1856-1956 /	DVD1321	©2006.	Projected medium - Physical	
				Solidaridad en Saya : un movimiento musical afroboliviano /	ML3575.B6 S65 2013	[2013]	Digital File - Video	
			Other	Luisa Fernanda	DVD698	c2007.	Projected medium - Physical	
			Tango un giro extraño	DVD1213	2006	Projected medium - Physical		
			Tangos, el exilio de Gardel	DVD1216	2006.	Projected medium - Physical		
	Tâcnica de la guitarra clâsica = The classic guitar technique	DVD1241	D.L. 2007.	Projected medium - Physical				
	Three by Duato	DVD329	2000 ;	Projected medium - Physical				
	Volavérunt	DVD766	1999.	Projected medium - Physical				
	Young Library	yimedia	Blu-Ray And DVD	No /	AV-D10390	[2013]	Digital File - Video	
	Book		Lo que sé de Lola /	AV-D0570	©2007.	Projected medium - Physical		
	DVD		Pan's labyrinth /	AV-D6699	[2016]	Digital File - Video		
A fantastic woman			AV-D0448	2018.	Digital File - Video			
Al otro lado To the other side /			AV-D10401	[2007]	Projected medium - Physical			
Amador			AV-D10394	2012, c2010.	Projected medium - Physical			
Bajarí	AV-D0357	D.L. 2013	Projected medium - Physical					
Caballos salvajes /	AV-D0807	©2004.	Digital File - Video					
Cabriola	AV-D10400	D.L. 2002.	Projected medium -					

# DATA NOT REPEATING: ANNOYING SOLUTION

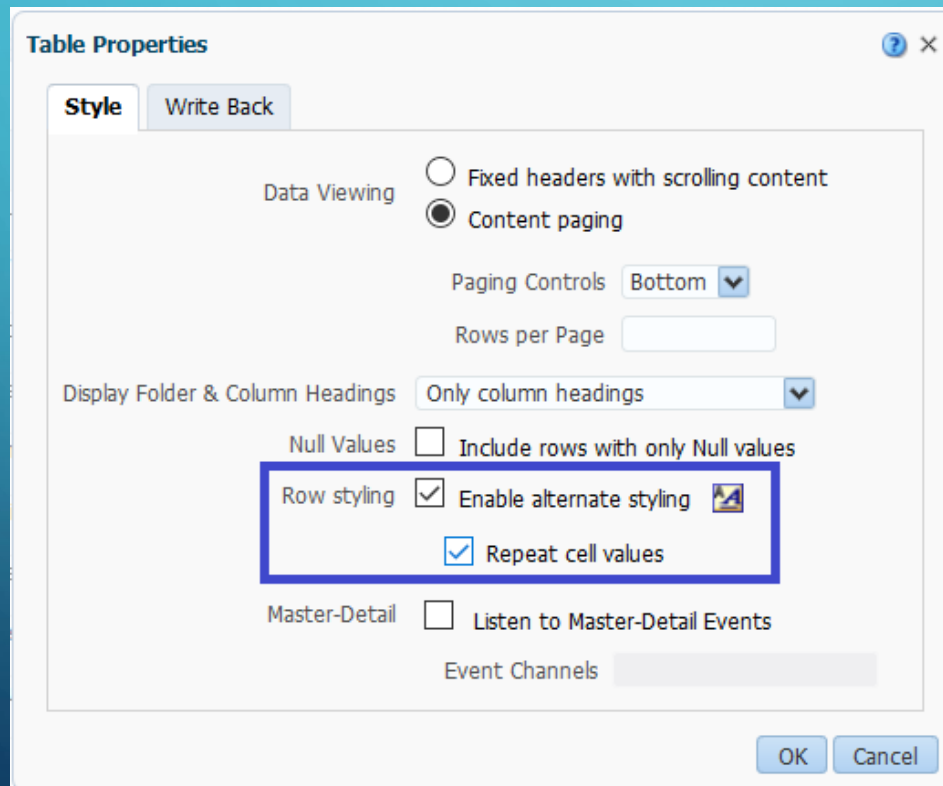


For each resulting column that is not repeating, in the Criteria tab, change the Column Properties / Column Format to repeat

# DATA NOT REPEATING: EASY SOLUTION



The screenshot shows a table titled "DVDs in Spanish" with the following columns: Language Code, Library Name, Location Code, Material Type, Title, Permanent Call Number, Publication Date, and Resource T. A blue circle highlights the "View Properties" icon in the top right corner of the table, with a blue arrow pointing to it.



The "Table Properties" dialog box is shown with the "Style" tab selected. The "Row styling" section has "Repeat cell values" checked. The "Data Viewing" section has "Content paging" selected. The "Paging Controls" dropdown is set to "Bottom". The "Display Folder & Column Headings" dropdown is set to "Only column headings". The "Null Values" section has "Include rows with only Null values" unchecked. The "Master-Detail" section has "Listen to Master-Detail Events" unchecked. The "Event Channels" field is empty. The "OK" and "Cancel" buttons are at the bottom.

In the Results tab, in the Table, click the “View Properties” icon

On the pop-up screen, select “Enable alternate styling” then “Repeat cell values”

# DATA NOW REPEATS!

Title

**DVDs in Spanish**


Table

Language Code	Library Name	Location Code	Material Type	Title	Permanent Call Number	Publication Date	Resource Type
spa	Fine Arts Library	famctr	DVD	El dúo de "La africana" /	DVD1322	©2006.	Projected medium - Physical
spa	Fine Arts Library	famctr	DVD	La Dolores /	DVD1320	©2006.	Projected medium - Physical
spa	Fine Arts Library	famctr	DVD	Madrileña bonita : homenaje a la mujer Madrileña en la zarzuela, 1856-1956 /	DVD1321	©2006.	Projected medium - Physical
spa	Fine Arts Library	famctr	DVD	Solidaridad en Saya : un movimiento musical afroboliviano /	ML3575.B6 S65 2013	[2013]	Digital File - Video
spa	Fine Arts Library	famctr	Other	Luisa Fernanda	DVD698	c2007.	Projected medium - Physical
spa	Fine Arts Library	famctr	Other	Tango un giro extraño	DVD1213	2006	Projected medium - Physical
spa	Fine Arts Library	famctr	Other	Tangos, el exilio de Gardel	DVD1216	2006.	Projected medium - Physical
spa	Fine Arts Library	famctr	Other	Tâecnica de la guitarra clâasica = The classic guitar technique	DVD1241	D.L. 2007.	Projected medium - Physical
spa	Fine Arts Library	famctr	Other	Three by Duato	DVD329	2000 ;	Projected medium - Physical
spa	Fine Arts Library	famctr	Other	Volavérunt	DVD766	1999.	Projected medium - Physical
spa	Young Library	ylmedia	Blu-Ray And DVD	No /	AV-D10390	[2013]	Digital File - Video
spa	Young Library	ylmedia	Book	Lo que sé de Lola /	AV-D0570	©2007.	Projected medium - Physical
spa	Young Library	ylmedia	Book	Pan's labyrinth /	AV-D6699	[2016]	Digital File - Video

# IMPORTING AN ANALYTICS REPORT INTO AN ALMA SET

# IMPORTING RESULTS OF AN ANALYSIS INTO A SET IN ALMA

1. Determine what set type you want to create (hint: check the list of jobs)

2. Determine what data point (header) your Analytics analysis should include 

3. Create and save your analysis in Analytics

Set content type	Required Header	Set content type	Required Header
All Titles	MMS ID	Electronic titles	PID
	ISSN		ISSN
	ISBN		ISBN
	OCLC number		OCLC number
	035 field		035 field
Authorities	MMS ID	PO line	PO line reference
Collections	PID	Physical items	Item ID (or PID or Item PID)
Digital files	PID		Barcode
Digital titles	PID	Physical titles	PID
	ISSN		ISSN
	ISBN		ISBN
	OCLC number		OCLC number
	035 field		035 field
Electronic collections	PID	User	Barcode
Electronic portfolios	PID		User name
	Portfolio ID		Institution ID
			Facebook
			Google
			Twitter
		Vendor	Vendor code



4. In Alma, go to Manage Sets. Click “Add set” at top and select “itemized”.

Fill in the set name, content type, description, etc.

At the bottom, click the button to add contents “From Analytics”.

Add Contents from File to Set

From File  From Analytics

Analytic Folder **UK Libraries- University of Kentucky (UKY)/Reports/For Pau**

Name **fine arts classed in Dewey 042219**

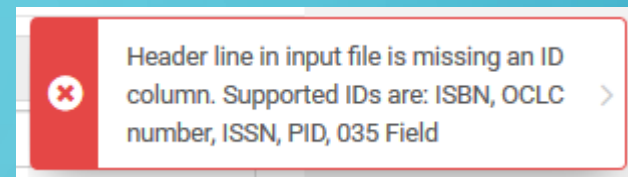
5. Select the **Analytics Folder** your analysis is saved in.

Recent reports are reports you've run in the last hour, regardless of where they are saved. All other reports available here should be saved in your institution's shared folder

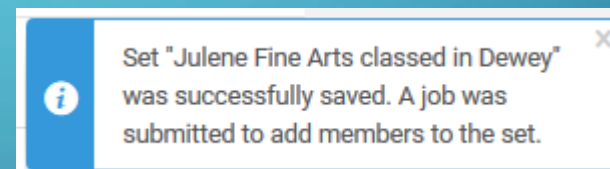
6. Select the analysis you want to import results from in the **Name** field.

7. Click save at the top of the screen.

If you have the wrong content type for your set, you'll see something like this:



If you have the correct content type for your set, you'll see something like this:



A job will run to add the results of your analysis to a set.

Once it's complete, your set will display under Manage sets.

### Manage Sets

My Sets Public Sets All Sets

1 - 36 of 36 Name

Content Type: All

Active	Name	Type	Content Type
<input checked="" type="checkbox"/>	852  x at refrdrsd, refsrd or refsdcens	Logical	Physical titles
<input checked="" type="checkbox"/>	852  x at sd	Logical	Physical titles
<input checked="" type="checkbox"/>	14 Julene Fine Arts classed in Dewey	Itemized	Physical items

Physical items Barcode

Physical Items (1 - 20 of 158) Set name Julene Fine Arts classed in Dewey Set type itemized

Select All

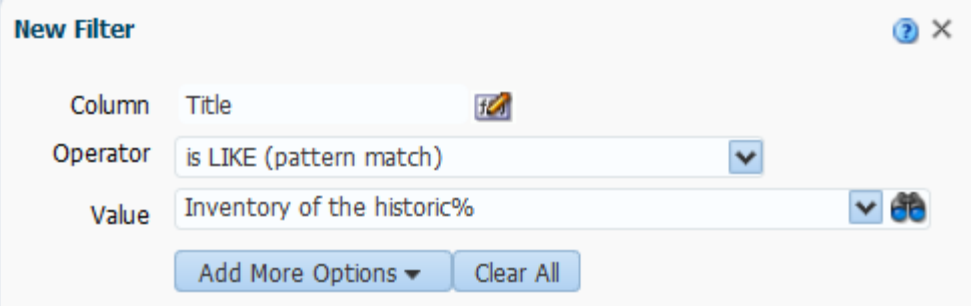
- Opera omnia = Collected works / Bertrandi Vaqueras ; edited by Richard Sheer.**  
Music By Vaqueras, Bertrandus, (Neuhausen-Stuttgart : American Institute of Musicology 1978, c1979.)  
Barcode: 304250231129W  
Update Date: 06/22/2016  
Library: Fine Arts Library  
Expected Arrival Time: -  
On Hold Expiration Date: -  
Due Date: -  
Needed By: -  
Until: -  
Permanent Location: FA Collected Ed  
Other details  
Call Number: 780.81 C817 no.78  
Call Number Type: Dewey Decimal classification  
Status: Item in place  
Due back: -  
Item Policy: collected  
Material Type: Music Score
- Canticle : for brass quartet / Richard Walker.**  
Music By Walker, Richard, (San Antonio : Southern Music Co c1972.)  
Barcode: 304250050246V  
Update Date: 06/22/2016  
Library: Fine Arts Library  
Expected Arrival Time: -  
On Hold Expiration Date: -  
Due Date: -  
Needed By: -  
Until: -  
Permanent Location: FA Library  
Other details  
Call Number: 785.7481 W1534c, MMp  
Call Number Type: Dewey Decimal classification  
Status: Item in place  
Due back: -  
Item Policy: book  
Material Type: Music Score
- Ludové tance na Slovensku.**  
Book By Zálesák, Cyril. (Bratislava, Osveta 1964.)  
Barcode: 3042537453250  
Update Date: 03/15/2019  
Library: Fine Arts Library  
Expected Arrival Time: -  
Call Number: 793.31 Z14  
Call Number Type: Dewey Decimal classification  
Status: Item in place  
Item Policy: book

< 1 of 8 >

# OTHER TIPS AND RESOURCES

# OTHER TIPS

- Wildcards
  - use underscore (\_) for a single character
  - use percent (%) for multiple characters
- Where was that?
  - “fund code” in Alma = “fund ledger code” in Analytics
- Use the search function to find reports created by others to use as a jumping off point.



The screenshot shows a 'New Filter' dialog box with the following configuration:

- Column: Title
- Operator: is LIKE (pattern match)
- Value: Inventory of the historic%

Buttons at the bottom: Add More Options, Clear All

# RESOURCES:

<https://innhold.bibsys.no/edx/alma/UserGuides/Alma%20Analytics%20Guide.pdf>

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics)

The queries we've used in this presentation are saved in  
Shared Folders/Community/Reports/Institutions/WIN Library Network/ELUNA 2019

QUESTIONS?



THANK YOU!

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