



University of Kentucky
UKnowledge

Library Presentations

University of Kentucky Libraries

10-13-2021

Refining Your Results in Alma Analytics

Julene L. Jones

University of Kentucky, julene.jones@uky.edu

Mary Ellen Willemsen

WIN Library Network, willemsen@gonzaga.edu

Follow this and additional works at: https://uknowledge.uky.edu/libraries_present



Part of the [Library and Information Science Commons](#)

[Right click to open a feedback form in a new tab to let us know how this document benefits you.](#)

Repository Citation

Jones, Julene L. and Willemsen, Mary Ellen, "Refining Your Results in Alma Analytics" (2021). *Library Presentations*. 237.

https://uknowledge.uky.edu/libraries_present/237

This Presentation is brought to you for free and open access by the University of Kentucky Libraries at UKnowledge. It has been accepted for inclusion in Library Presentations by an authorized administrator of UKnowledge. For more information, please contact UKnowledge@lsv.uky.edu.



REFINING YOUR RESULTS WITH ALMA ANALYTICS

Julene Jones and Mary Ellen Willemssen

ELUNA 2021

AGENDA



Creating Reusable Filters



Using Multiple Filters per Column



Creating and using bins



Using CASE function



Using CAST function

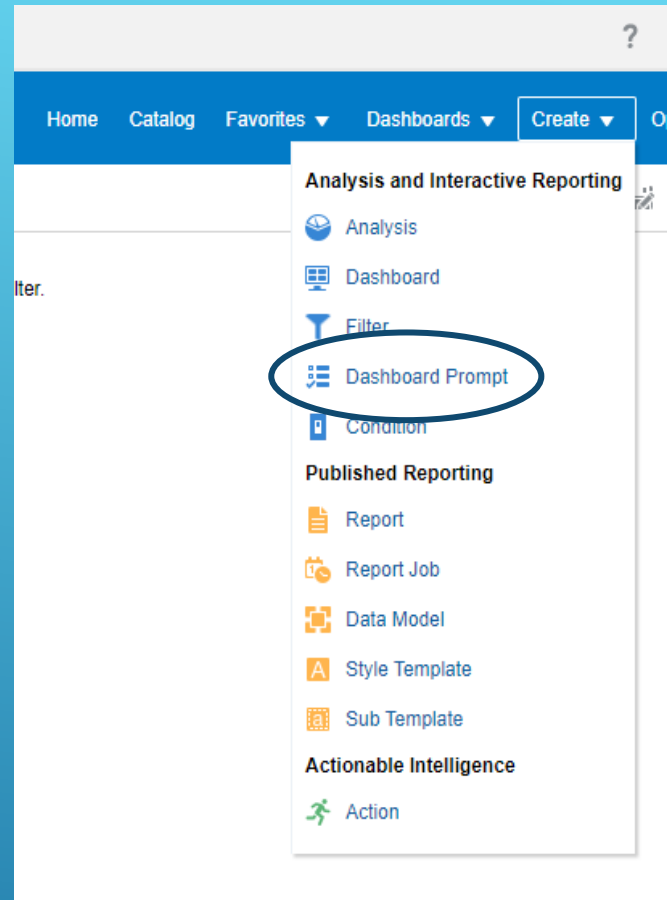


A tip for inserting set data from Alma

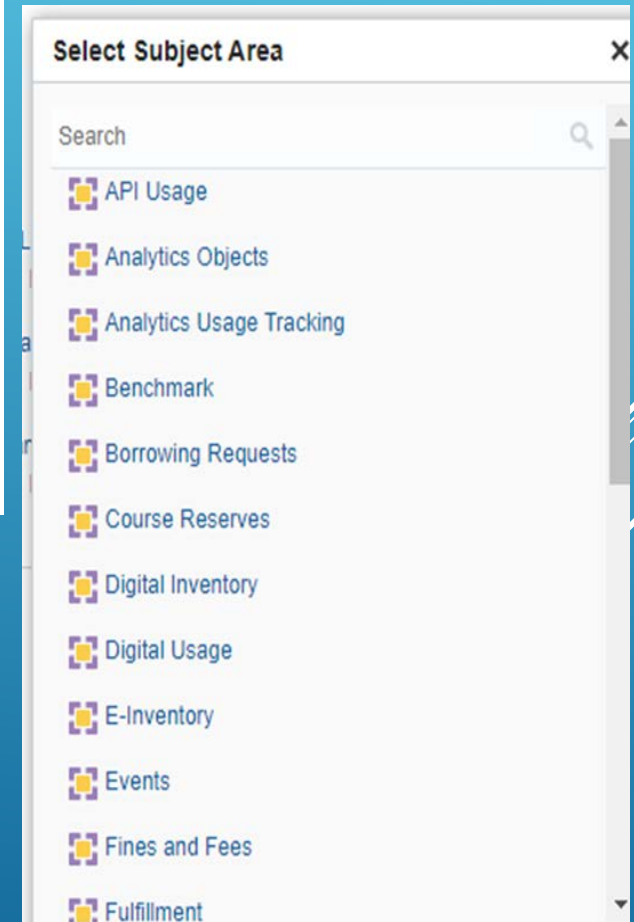
CREATING A REUSABLE FILTER



IN ANALYTICS, GO TO
"CREATE" AND CHOOSE
FILTER



NEXT, SELECT YOUR
SUBJECT AREA



From the subject area, choose the field you wish to filter. (In this case, Creation Date)

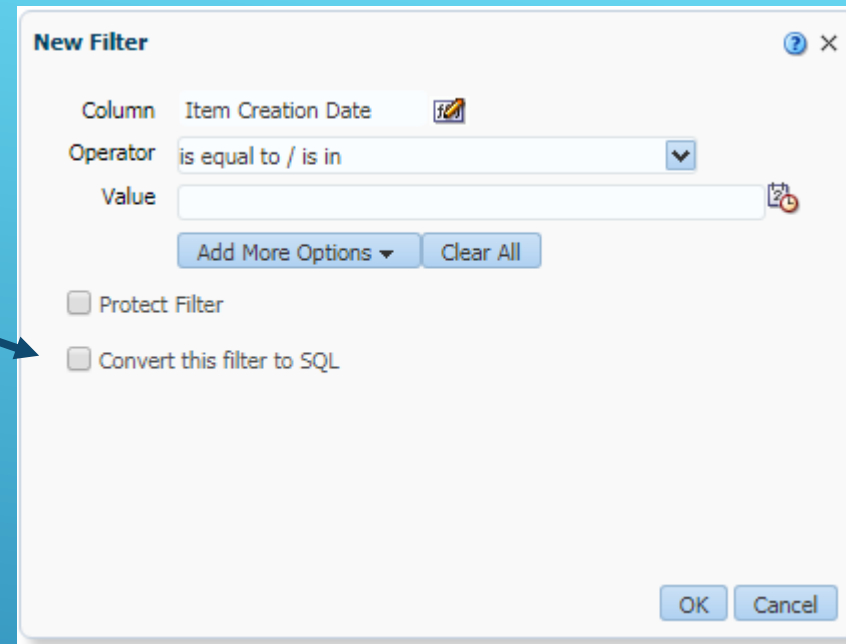
Select "Convert this filter to SQL."

Filter for all items created in the last 3 months:

Add "`>= TIMESTAMPADD(SQL_TSI_MONTH, -3, CURRENT_DATE)`" after "Item Creation Date"."Item Creation Date" "

Click OK

Click Save As



New Filter

Column: Item Creation Date

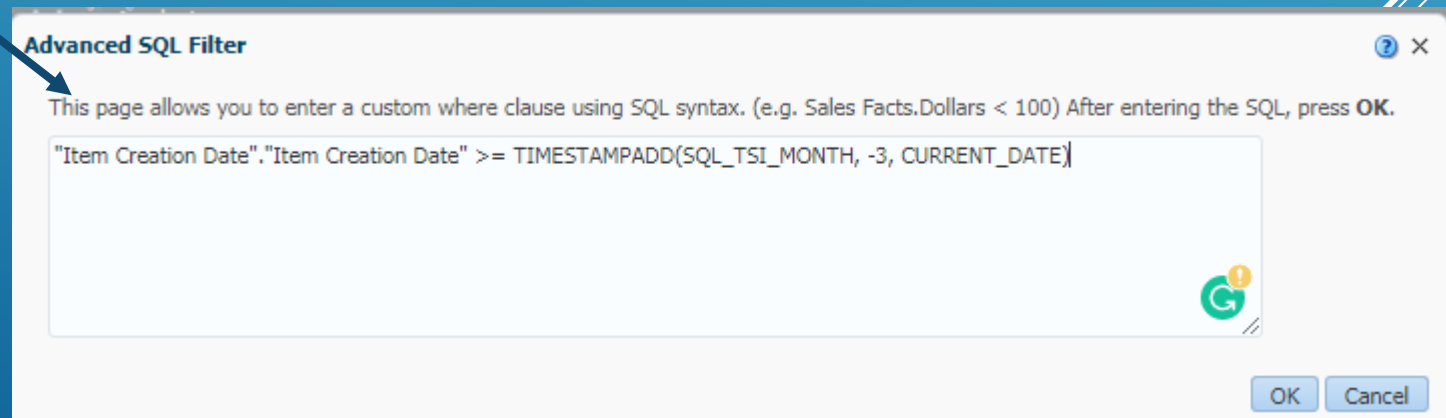
Operator: is equal to / is in

Value: [Empty field]

Protect Filter

Convert this filter to SQL

Buttons: Add More Options, Clear All, OK, Cancel



Advanced SQL Filter

This page allows you to enter a custom where clause using SQL syntax. (e.g. Sales Facts.Dollars < 100) After entering the SQL, press **OK**.

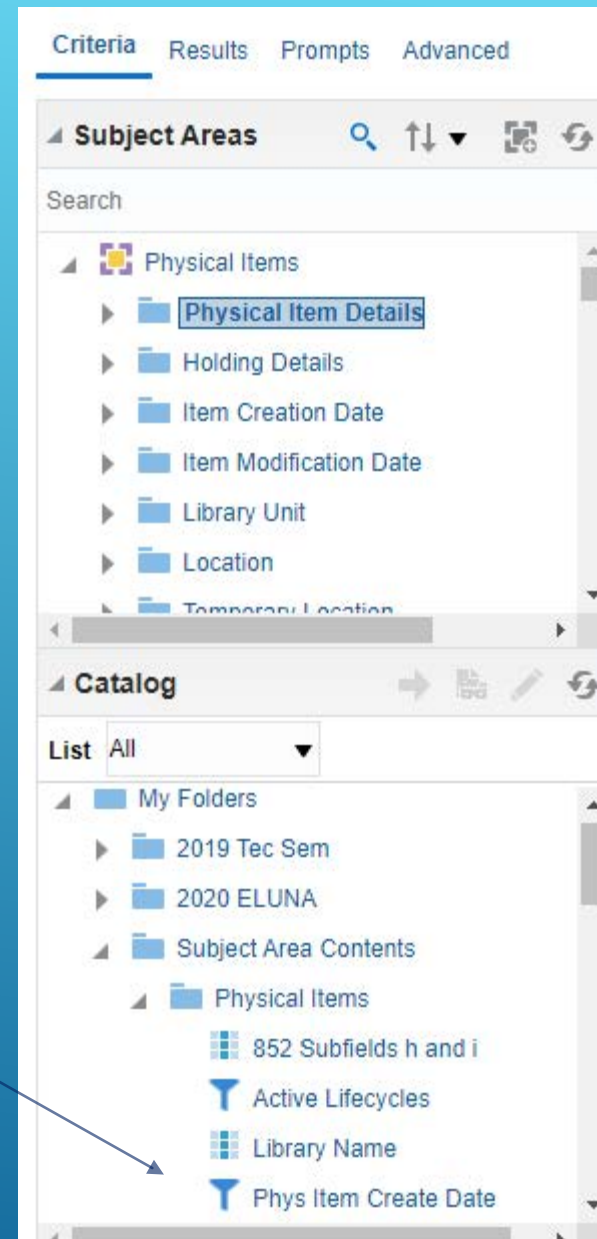
`"Item Creation Date"."Item Creation Date" >= TIMESTAMPADD(SQL_TSI_MONTH, -3, CURRENT_DATE)`

Buttons: OK, Cancel

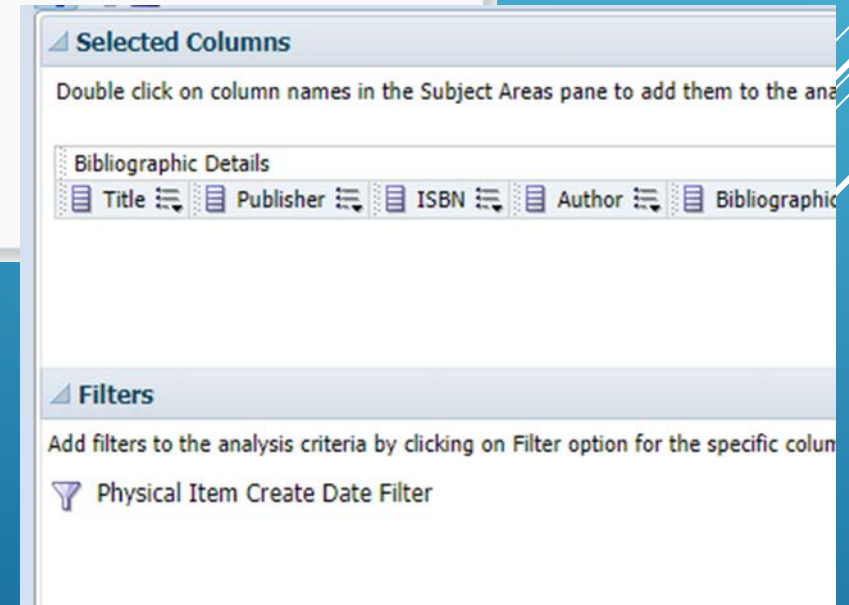
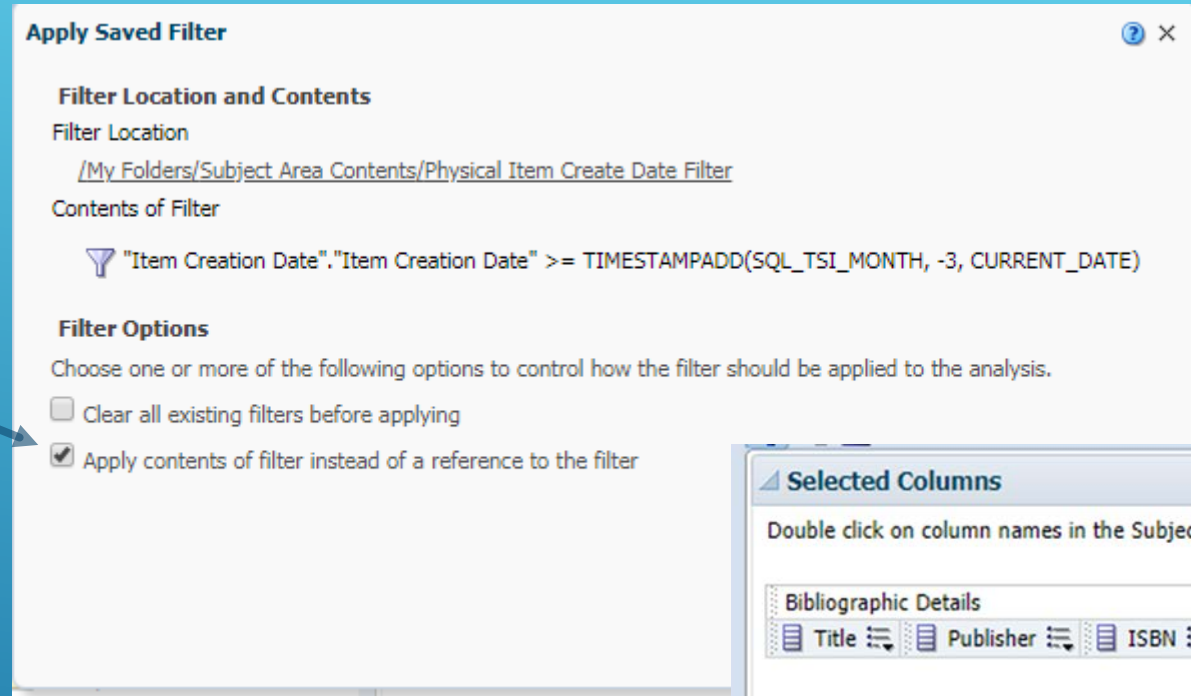
The filter will be saved in the Catalog in your Subject Area Content folder. You may choose either your "My Folder" or your local institution folder.

To use the filter, create your analysis. Include the field that you wish to filter. (You don't have to include it if you don't wish to see that data included in your results.)

Go to the Catalog section in the lower left of your window and follow the path to your filter. Double click it.



Under "Filter Options," choose the second option. If you choose the first filter option, you will lose all of your existing filters. (Even those you have just created.)



If you choose to “Apply contents of filter instead of a reference to the filter”, you will get the filter added to your existing filters.

Double-click on column names in the Subject Areas pane to add them to the analysis. Once added, drag and drop con

Bibliographic Details	LC Classifications
Title	Classification Code
Publisher	
ISBN	
Author	
Bibliographic Lifecycle	

Filters

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

















- Classification Code is equal to / is in R
- AND Bibliographic Lifecycle is equal to / is in In Repository
- AND Library Name is equal to / is in Foley
- AND "Item Creation Date"."Item Creation Date" >= TIMESTAMPADD(SQL_TSI_MONTH, -3, CURRENT_DATE)

FILTERING THE SAME FIELD MULTIPLE TIMES






LET'S START WITH THIS ANALYSIS

Selected Columns

Library Unit	Fund Transactions	Bibliographic Details					
 Library Code 	 Transaction Amount 	 Transaction Amount 	 Transaction Amount 	 Transaction Amount 	 Material Type 	 Resource Type 	 Bib Level 

Filters

-  Status is equal to / is in ACTIVE; CANCELLED; CLOSED
- AND  Library Code is equal to / is in FOLEY; GIF
- AND  Resource Type contains any Electronic

You can see the Fiscal year is repeated multiple times for several different fiscal periods.

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 filters, apply sorting, or delete by clicking or h

Library Unit	Fiscal Year	Bibliographic Details							
Library Code	2014 - 2015	2015 - 2016	2016 - 2017	2017 - 2018	2018 - 2019	2019 - 2020	Material Type	Resource Type	Bib Level

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Sel

- Status is equal to / is in ACTIVE; CANCELLED; CLOSED
- AND** Library Code is equal to / is in FOLEY; GIF
- AND** Resource Type contains any Electronic

Compound Layout

Title: Material Expenditures for Electronic 6 Yrs

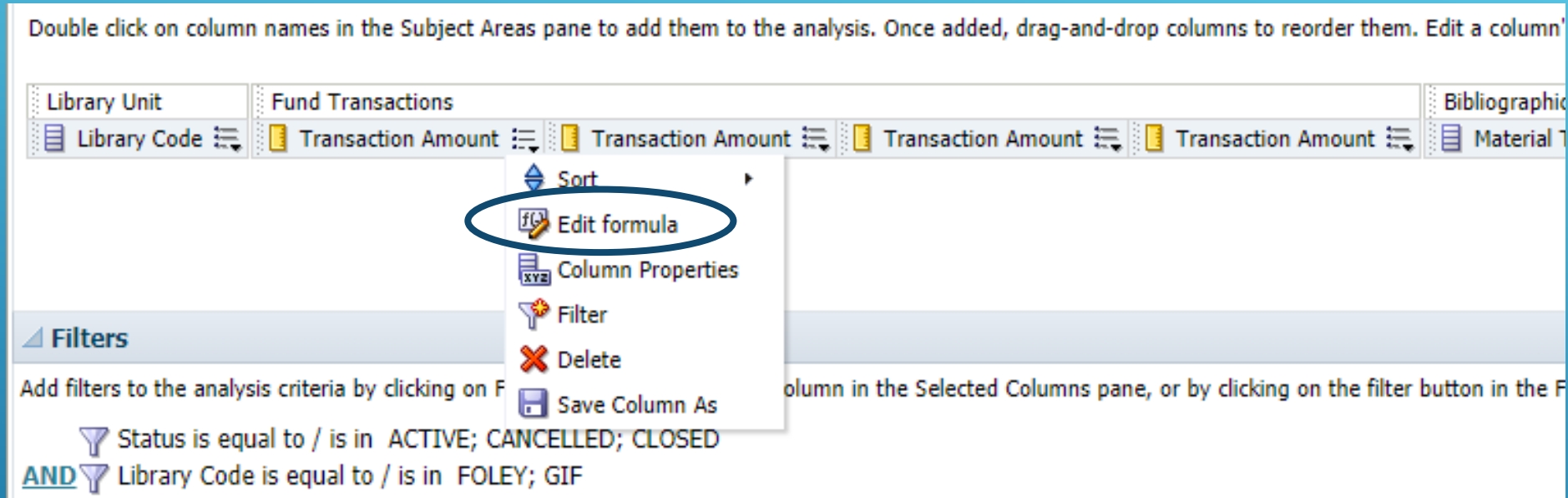
Table

Library Code	Resource Type	Material Type	Bib Level	2014 - 2015	2015 - 2016	2016 - 2017	2017 - 2018	2018 - 2019	2019 - 2020
FOLEY	Atlas - Electronic	Map	Monograph				\$0.00		
	Book - Electronic	Book		\$238,967.72	\$243,461.31	\$293,470.21	\$282,059.99	\$286,372.62	\$294,168.04
	Other material - Electronic	Computer file		\$26,588.60	\$72,543.22	\$29,381.71	\$31,600.00	\$16,455.28	\$18,779.68
	Projected medium - Electronic	Visual material		\$3,901.00	\$8,162.81	\$5,777.26	\$20,496.18	\$31,600.00	\$19,498.00
			Monograph Total	\$269,457.32	\$324,167.34	\$328,629.18	\$334,156.17	\$334,427.90	\$332,445.72
FOLEY	Journal (Ceased publication) - Electronic	Journal	Serial			\$0.00		\$0.00	\$2.14
	Journal - Electronic	Journal		\$61,915.96	\$73,007.16	\$79,451.32	\$123,859.78	\$170,599.09	\$192,246.48
	Newspaper - Electronic	Journal		\$5,275.00	\$5,540.00	\$40,462.00	\$33,690.23	\$42,104.00	\$43,454.75
	Other Serial - Electronic	Journal		\$42,760.50	\$46,416.66	\$49,736.50	\$54,902.17	\$47,697.43	\$54,965.07
	Other material - Electronic	Computer file							\$5,310.00
			Serial Total	\$109,951.46	\$124,963.82	\$169,649.82	\$212,452.18	\$260,400.52	\$295,978.44
FOLEY	Newspaper - Electronic	Journal	i		\$964.69	\$2,076.49	\$1,116.74		\$1,172.58
	Other Serial - Electronic	Journal		\$194,199.71	\$319,861.89	\$218,300.10	\$287,707.54	\$207,694.14	\$275,910.45
	Other material - Electronic	Computer file		\$3,500.00		\$1,980.00	\$1,980.00	\$1,980.00	\$1,980.00
			i Total	\$197,699.71	\$320,826.58	\$222,356.59	\$290,804.28	\$209,674.14	\$279,063.03
Grand Total				\$577,108.49	\$769,957.74	\$720,635.59	\$837,412.63	\$804,502.56	\$907,487.19

So how do we do this?

Click on the drop down menu in the first Transaction Amount cell and choose "Edit Formula".

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



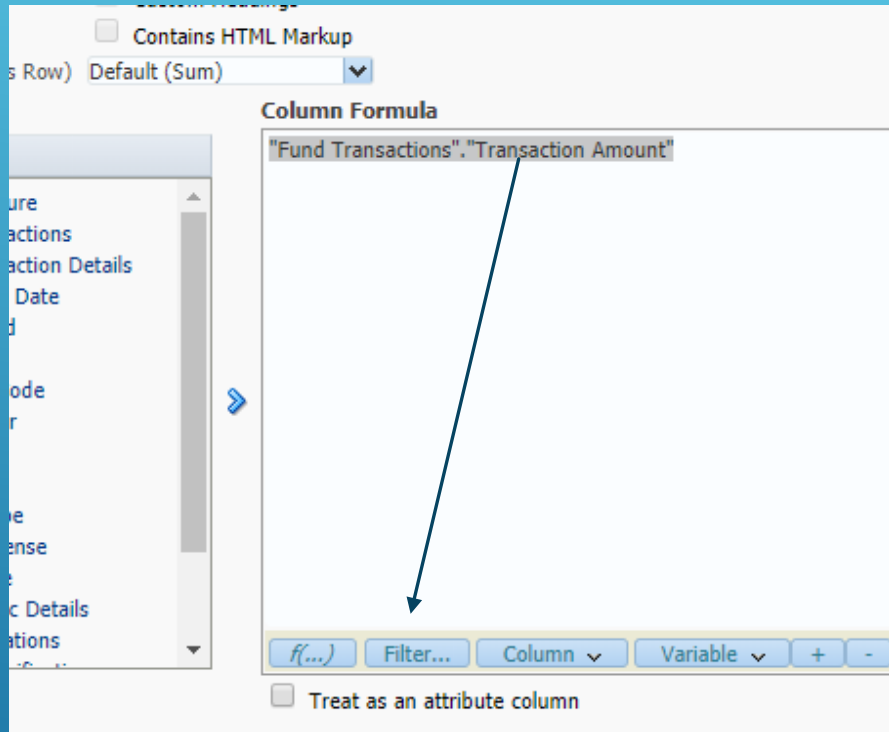
The screenshot shows a software interface with a table of columns. The columns are: Library Unit, Fund Transactions, Transaction Amount, Transaction Amount, Transaction Amount, Transaction Amount, and Bibliographic. The first 'Transaction Amount' column has a context menu open over it. The menu items are: Sort, Edit formula (circled in red), Column Properties, Filter, Delete, and Save Column As. Below the menu, there is a 'Filters' section with the text 'Add filters to the analysis criteria by clicking on F'. There are two filter criteria listed: 'Status is equal to / is in ACTIVE; CANCELLED; CLOSED' and 'AND Library Code is equal to / is in FOLEY; GIF'.

Library Unit	Fund Transactions	Bibliographic
Library Code	Transaction Amount	Material T

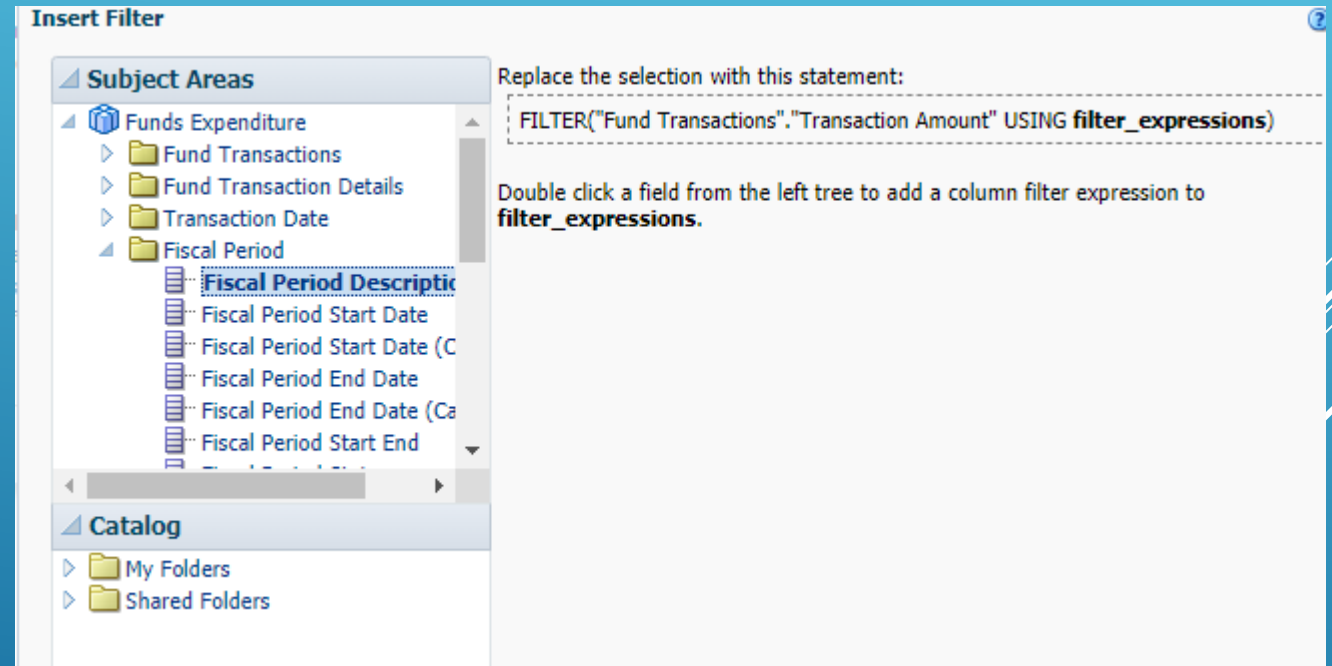
Filters
Add filters to the analysis criteria by clicking on F

- Status is equal to / is in ACTIVE; CANCELLED; CLOSED
- AND Library Code is equal to / is in FOLEY; GIF

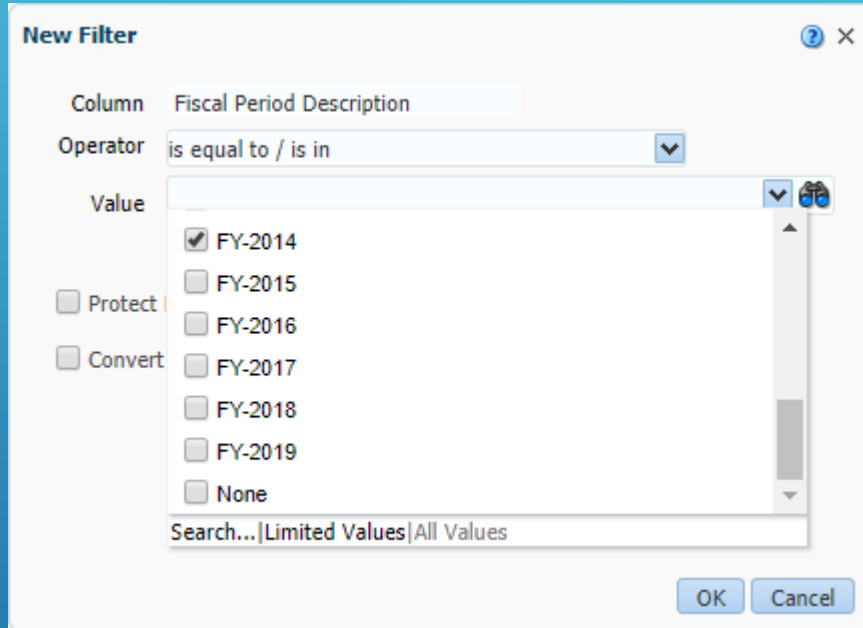
At the bottom of the Column Formula window click on "Filter".



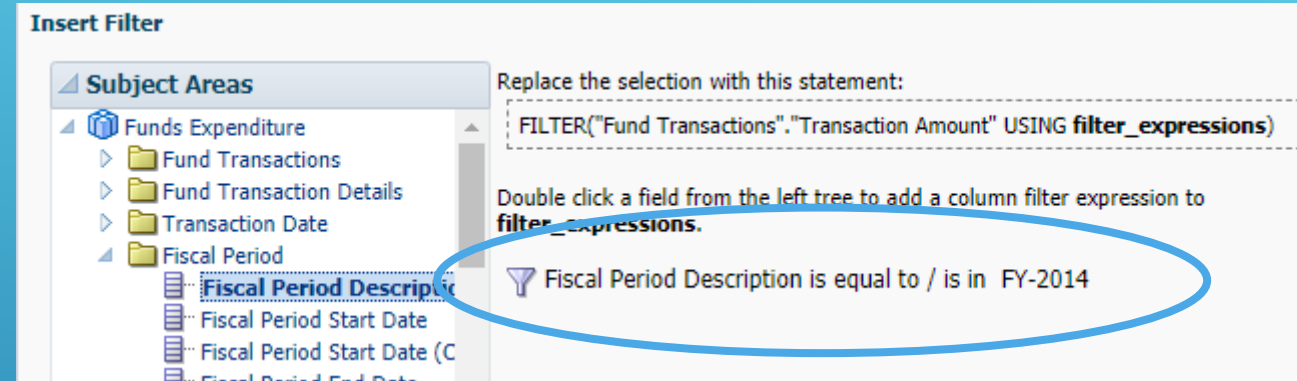
In the Subject Area window expand "Fiscal Period" and double click on "Fiscal Period Description".



Choose the fiscal period you want in that cell and click OK.



Your filter has now been added!



Click OK again.

But before you close the Edit Column Formula window...

Make a couple of changes to this column:

- 1) change the Column Heading to the corresponding FY
- 2) Change the Folder Heading so that it makes sense. I used Fiscal period in this example but I could have used "Expenditures per FY"

Edit Column Formula

Column Formula | Bins

Folder Heading Fund Transactions

Column Heading Transaction Amount

Custom Headings

Contains HTML Markup

Aggregation Rule (Totals Row) Default (Sum) ▼

Available

Subject Areas

Column Formula

`FILTER("Fund Tra
= 'FY-2014'))`

This screenshot shows the initial configuration of the 'Edit Column Formula' dialog. The 'Folder Heading' is 'Fund Transactions' and the 'Column Heading' is 'Transaction Amount'. The 'Custom Headings' checkbox is unchecked. The 'Aggregation Rule (Totals Row)' is set to 'Default (Sum)'. The 'Available' section shows 'Subject Areas' and the 'Column Formula' field contains the formula `FILTER("Fund Tra = 'FY-2014'))`.

Column Formula | Bins

Folder Heading Fiscal Period

Column Heading FY 2014

Custom Headings

Contains HTML Markup

Aggregation Rule (Totals Row) Default (Sum) ▼

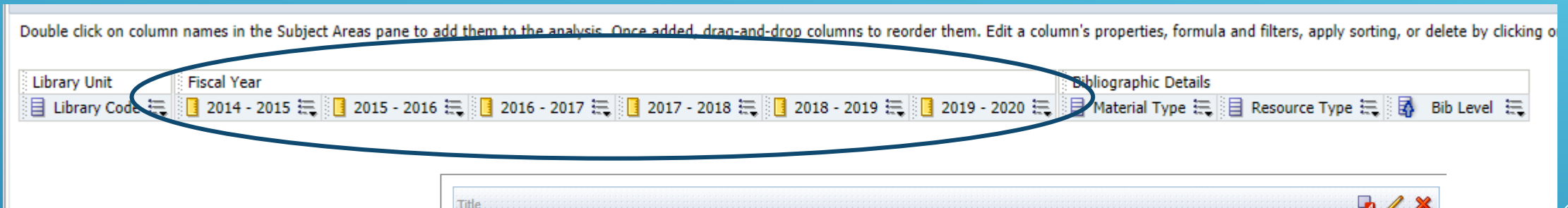
Available

Column Formula

`FILTER("Fund Transactions" "Tra`

This screenshot shows the modified configuration of the 'Edit Column Formula' dialog. The 'Folder Heading' has been changed to 'Fiscal Period' and the 'Column Heading' has been changed to 'FY 2014'. The 'Custom Headings' checkbox is now checked. The 'Aggregation Rule (Totals Row)' remains 'Default (Sum)'. The 'Available' section shows 'Column Formula' and the 'Column Formula' field contains the formula `FILTER("Fund Transactions" "Tra`.

Repeat the formula editing for each Transaction Amount column, changing the fiscal year each time until your analysis looks like this:



You may add totals by right clicking in the fields and adding totals "after".

Title: Material Expenditures for Electronic 6 Yrs

Table

Library Code	Resource Type	Material Type	Bib Level	2014 - 2015	2015 - 2016	2016 - 2017	2017 - 2018	2018 - 2019	2019 - 2020
FOLEY	Newspaper - Electronic	Journal	i		\$964.69	\$2,076.49	\$1,116.74		\$1,172.58
	Other Serial - Electronic	Journal		\$194,199.71	\$319,861.89	\$218,300.10	\$287,707.54	\$207,694.14	\$276,991.45
	Other material - Electronic	Computer file		\$3,500.00		\$1,980.00	\$1,980.00	\$1,980.00	\$1,980.00
			i Total	\$197,699.71	\$320,826.58	\$222,356.59	\$290,804.28	\$209,674.14	\$280,144.03
FOLEY	Atlas - Electronic	Map	m				\$0.00		
	Book - Electronic	Book		\$238,967.72	\$243,461.31	\$293,470.21	\$282,059.99	\$286,372.62	\$294,925.13
	Other material - Electronic	Computer file		\$26,588.60	\$72,543.22	\$29,381.71	\$31,600.00	\$16,455.28	\$18,779.68
	Projected medium - Electronic	Visual material		\$3,901.00	\$8,162.81	\$5,777.26	\$20,496.18	\$31,600.00	\$25,348.00
			m Total	\$269,457.32	\$324,167.34	\$328,629.18	\$334,156.17	\$334,427.90	\$339,052.81
FOLEY	Journal (Ceased publication) - Electronic	Journal	s			\$0.00		\$0.00	\$2.14
	Journal - Electronic	Journal		\$61,705.39	\$72,805.51	\$79,413.56	\$123,560.81	\$170,300.12	\$192,768.47
	Newspaper - Electronic	Journal		\$5,275.00	\$5,540.00	\$40,462.00	\$33,690.23	\$42,104.00	\$43,454.75
	Other Serial - Electronic	Journal		\$42,760.50	\$46,416.66	\$49,736.50	\$54,902.17	\$47,697.43	\$54,965.07
	Other material - Electronic	Computer file							\$5,310.00
			s Total	\$109,740.89	\$124,762.17	\$169,612.06	\$212,153.21	\$260,101.55	\$296,500.43
Grand Total				\$576,897.92	\$769,756.09	\$720,597.83	\$837,113.66	\$804,203.59	\$915,697.27

Changing text in a cell. I wanted to change the bib level letter indicators to the words they represent.

The image shows two side-by-side screenshots of an Excel spreadsheet. The left screenshot shows a table with columns 'type', 'Bib Level', and '2'. It contains rows with 'i Total' and 'm Total' highlighted in grey. Two blue arrows point from these rows to the right screenshot. The right screenshot shows the same table after editing, with 'i Total' replaced by 'Monograph Total' and 'm Total' replaced by 'Serial Total'. The right screenshot also shows other rows with 'Bib Level' and 'Serial'.

type	Bib Level	2
	i	
file		
	i Total	\$
	m	
file		
terial		
	m Total	\$
	s	
file		

Bib Level	201
Monograph	
	\$
	\$
Monograph Total	\$26
Serial	
	\$
	\$
	\$
	\$
Serial Total	\$30
	\$57

So here is the formula I started with:

```
REPLACE (REPLACE(REPLACE( "Bibliographic Details"."Bibliographic Level", 'i', 'Serial'), 'm', 'Monograph'), 's', 'Serial')
```

The order you put your REPLACE commands in is really important.

In this particular case, the word "serial" contains an "i". Here is what happens if you put "s" before "i". REPLACE (REPLACE(REPLACE("Bibliographic Details"."Bibliographic Level",'s','Serial'),'m','Monograph'),'i','Serial')

Material Type	Bib Level	2014 -
	Monograph	
		\$238
Computer file		\$26
Print material		\$3
	Monograph Total	\$269,
	SerSerialal	
		\$63
		\$5
		\$42
Computer file		
	SerSerialal Total	\$109,
	Serial	
		\$194
Computer file		\$3
	Serial Total	\$197,
		\$576,

Analytics will replace the "s" in "serial" with the word "serial" – so it replaces "s" with "serial" then replaces that "i" with the word "serial" again and you get "SerSerialal". Remember Analytics formulas start with the innermost command. So when you have the "s" changing to "serial" first that adds an "i" that the later command will also change.

So be sure that your first (or centermost) command will not create problems for you. So in this case my center most command had to look like this.

REPLACE (REPLACE (REPLACE("Bibliographic Details"."Bibliographic Level",'i','Serial'),'m','Monograph'),'s','Serial')

But, there is a better way – Bins!

Bib Level	20
Monograph	
Monograph Total	\$2
Serial	

Here are the bins

Edit Column Formula

Column Formula **Bins**

1.	▼ Bibliographic Level is equal to / is in m ▼	Monograph	✕ ▼
2.	▼ Bibliographic Level is equal to / is in i ▼	Serial	✕ ▼ ^
3.	▼ Bibliographic Level is equal to / is in s ▼	Serial	✕ ^

Create a bin for all other values

And here's the resulting analysis

Title

Material Expenditures for Electronic 6 Yrs - BINS

Table

Library Code	Resource Type	Material Type	Bib Level	2014 - 2015	2015 -
FOLEY	Atlas - Electronic	Map	Monograph		
	Book - Electronic	Book		\$209,831.84	\$212,000.00
	Other material - Electronic	Computer file		\$18,357.00	\$20,500.00
	Projected medium - Electronic	Visual material		\$998.10	\$3,900.00
			Monograph Total	\$229,186.94	\$236,400.00
FOLEY	Journal (Ceased publication) - Electronic	Journal	Serial		
	Journal - Electronic	Journal		\$26,976.73	\$61,300.00
	Newspaper - Electronic	Journal		\$5,938.75	\$5,200.00
	Other Serial - Electronic	Journal		\$195,227.17	\$219,700.00
	Other material - Electronic	Computer file			\$3,500.00
			Serial Total	\$228,142.65	\$289,800.00

CREATING BINS



How long have items been in a temporary location?

We assign a temporary location to materials that need to be reviewed before preservation action can be taken on them. Their last “modification date” is the date we assign the temp location:

The screenshot shows the 'preservation review shelf' interface. At the top, there are tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. Below the tabs is a 'Subject Areas' pane on the left with a tree view containing folders like 'Physical Items', 'Physical Item Details', 'Holding Details', 'Item Creation Date', 'Item Modification Date', 'Library Unit', 'Location', 'Temporary Location', 'Bibliographic Details', 'LC Classifications', 'Dewey Classifications', 'Other Classifications', 'PO Line', 'Fund Information', 'Receiving Operator', and 'Institution'. The main area is divided into 'Selected Columns' and 'Filters'. The 'Selected Columns' pane shows a table with columns: 'Physical Item Details' (Barcode, Modification Date), 'Temporary Location' (Temporary Location Code), 'Bibliographic Details' (Title), 'Location' (Location Code), and 'Holding Details' (Normalized Call Number, Permanent Call Number). The 'Filters' pane shows a filter: 'Temporary Location Code is equal to / is in ylpres'.

Criteria Results Prompts Advanced

Subject Areas

- Physical Items
 - Physical Item Details
 - Holding Details
 - Item Creation Date
 - Item Modification Date
 - Library Unit
 - Location
 - Temporary Location
 - Bibliographic Details
 - LC Classifications
 - Dewey Classifications
 - Other Classifications
 - PO Line
 - Fund Information
 - Receiving Operator
 - Institution

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 filters, apply sort

Physical Item Details	Temporary Location	Bibliographic Details	Location	Holding Details	
Barcode	Temporary Location Code	Title	Location Code	Normalized Call Number	Permanent Call Number

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 saved filter by cl

Temporary Location Code is equal to / is in ylpres

Add count of days since modification date & today

TIMESTAMPDIFF(SQL_TSI_DAY, "Physical Item Details"."Modification Date",
CURRENT_DATE)

Edit Column Formula

Column Formula | Bins

Folder Heading: Physical Item Details

Column Heading: No. of Days at Temp Location

Custom Headings

Contains HTML Markup

Aggregation Rule (Totals Row): Default (None)

Available

Subject Areas

- Physical Items
 - Physical Item Details
 - Holding Details
 - Item Creation Date
 - Item Modification Date
 - Library Unit
 - Location
 - Temporary Location
 - Bibliographic Details
 - LC Classifications
 - Dewey Classifications
 - Other Classifications
 - PO Line
 - Fund Information
 - Receiving Operator

Column Formula

TIMESTAMPDIFF(SQL_TSI_DAY, "Physical Item Details"."Modification Date", CURRENT_DATE)

f(...) Filter... Column Variable + - x / % () ||

Which returns this:

preservation review shelf

Table

Barcode	Modification Date	No. of Days at Temp Location	Temporary Location Code	Title	Location Code	Permanent Call Number	Normalized
3042501211140	9/21/2018	584	ylpres	Archaic prehistory in the Western United States.	y4	E78.W5 A730	0e!78 w5 :
3042501927897	9/20/2018	585	ylpres	The coal question; an inquiry concerning the progress of the nation, and the probable exhaustion of our coal-mines,	y4	HD9551.6 .J5	0hd#9551
304250303913X	9/21/2018	584	ylpres	Western horses	y5	SF285 .G6 1969	0sf"285 g6
304250319067/	9/21/2018	584	ylpres	Conserving wildland resources through research; introductory report.	y5	SD144.C3 C32	0sd"144 c3
3042504217791	11/18/2016	1,256	ylpres	The American commonwealth,	y4	JK246 .B9 1899	0jk"246 b9
304250450427-	7/28/2017	1,004	ylpres	On liberty ; Representative government ; The subjection of women : three essays /	y4	JC585 .M6 1873	0jc"585 m6
304250524604Z	7/26/2016	1,371	ylpres	Case studies in the psychopathology of crime.	y4	HV6080 .K27 1939	0hv#6080
3042505442961	3/13/2018	776	ylpres	Homo viator; introduction to a metaphysic of hope.	y3	B2430.M253 H63 1951	0b#2430 r
3042505468172	9/21/2018	584	ylpres	Profit sharing and stock ownership for wage earners and executives,	y4	HD2984 .S8	0hd#2984
304250547501-	7/26/2016	1,371	ylpres	The sources and analogues of "A Midsummer-night's dream"	y5	PR2827 .S4	0pr#2827
304250552438+	5/2/2017	1,091	ylpres	The letters and times of the Tylers.	y4	E397 .T98	0e"397 t98
3042505582562	9/8/2016	1,327	ylpres	Loving.	y5	PR6013.R416 L6	0pr#6013
3042505839411	9/20/2018	585	ylpres	The Iliad,	y4	PA4019 .A2 1946	0pa#4019
3042506287936	9/20/2018	585	ylpres	The study of the Bible in the Middle Ages /	y3	BS500 .S5	0bs"500 s5
3042506458565	4/26/2017	1,097	ylpres	Prefaces to Shakespeare.	y5	PR2976 .G67	0pr#2976
3042508290954	9/21/2018	584	ylpres	Geology of the Big Lime Formation in Eastern Kentucky /	sci	Theses 1941	8theses00
3042508643743	9/8/2016	1,327	ylpres	Mansfield park /	y5	PR4034 .M3 1931	0pr#4034

Nice, but not exactly what I wanted...

Edit query to be:

The screenshot displays the 'preservation review shelf overview' interface. At the top, there are tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. Below the tabs is a toolbar with various icons. The main area is divided into three panes:

- Subject Areas:** A tree view showing a hierarchy of folders under 'Physical Items', including 'Physical Item Details', 'Holding Details', 'Item Creation Date', 'Item Modification Date', 'Library Unit', 'Location', 'Temporary Location', 'Bibliographic Details', 'LC Classifications', 'Dewey Classifications', 'Other Classifications', 'PO Line', 'Fund Information', 'Receiving Operator', and 'Institution'.
- Selected Columns:** A list of columns selected for analysis, including 'Physical Item Details', 'No. of Days at Temp Location', and 'Num of Items (In Repository)'. A note above the list says: 'Double click on column names in the Subject Areas pane to add them to the ana...'
- Filters:** A section for adding filters to the analysis criteria. A note says: 'Add filters to the analysis criteria by clicking on Filter option for the specific column...'. A filter is currently applied: 'Temporary Location Code is equal to / is in ylpres'.

Then add bins to the "No. of days..." column

New Filter [?] [X]

Column: `TIMESTAMPDIFF(SQL_TSI_DAY ,`

Operator: `is between` [v]

Value: `91` [v] [🔍]

Value: `182` [v] [🔍]

[Add More Options v] [Clear All]

Protect Filter

Convert this filter to SQL

Edit Bin Name [X]

`3 months to 6 months`

[OK] [Cancel]

Edit Column Formula

Column Formula [Bins]

1.	<code>TIMESTAMPDIFF(SQL_TSI_DAY , Mo... is less than 91</code>	[Y]	3 months or less	[🔍] [X] [v]
2.	<code>TIMESTAMPDIFF(SQL_TSI_DAY , Mo... is between 91 and 182</code>	[Y]	3 months to 6 months	[🔍] [X] [v] [▲]
3.	<code>TIMESTAMPDIFF(SQL_TSI_DAY , Mo... is between 182 and 365</code>	[Y]	6 months to 1 year	[🔍] [X] [v] [▲]
4.	<code>TIMESTAMPDIFF(SQL_TSI_DAY , Mo... is between 365 and 730</code>	[Y]	1 year to 2 years	[🔍] [X] [▲]
5.	All other values		more than 2	[🔍] [X]

preservation review shelf overview

Table

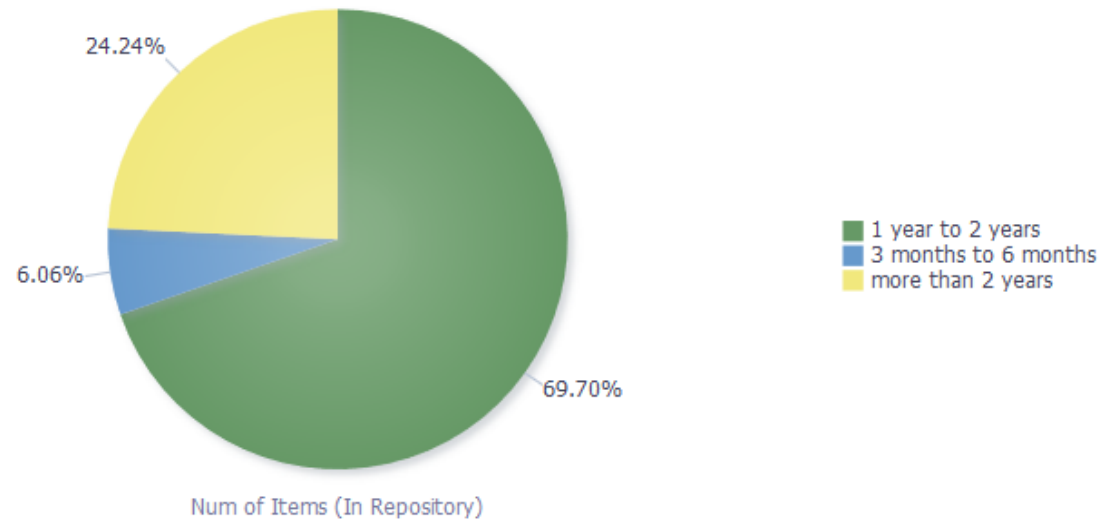


No. of Days at Temp Location ▲▼	Num of Items (In Repository)
more than 2 years	8
6 months to 1 year	
3 months to 6 months	2
3 months or less	
1 year to 2 years	23

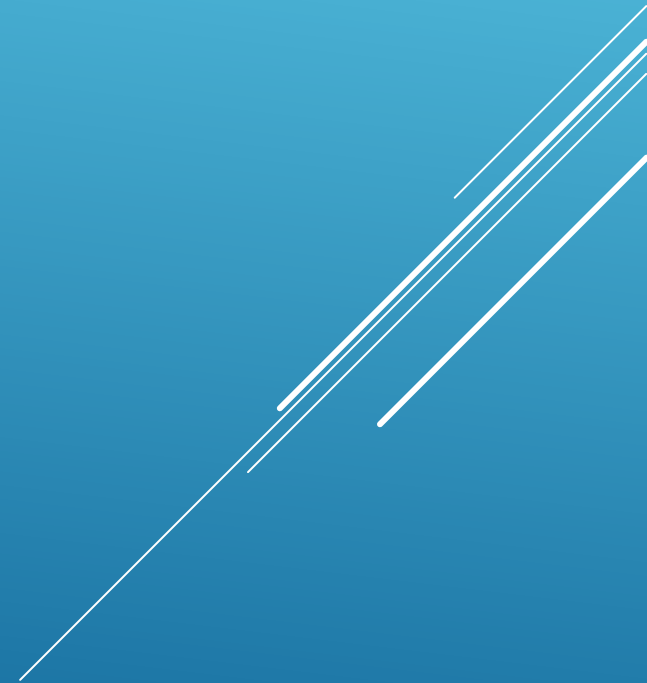
Graph



Num of Items (In Repository)



USING CASE FILTER



Alma processes a search in Alma irrespective of the case of a barcode;
Analytics searches are case-sensitive

Our barcode scanners are programmed to scan in lower-case only

```
304253289878g  
304253859396e  
304253289881a
```

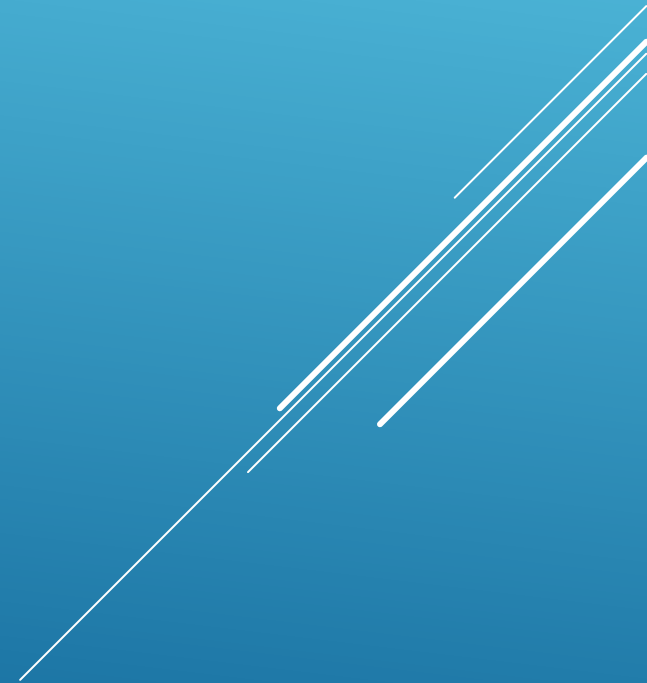
We wanted to create a widget for use by our Fulfillment employees to quickly check the circulation of a barcode but needed barcodes ending letters to display as upper case*

```
UPPER("Physical Item Details"."Barcode")
```

- Edit formula
- Highlight "Physical item Details"."Barcode"
- Click f(...)
- Click on String
- Select Upper

*We wanted to avoid changing barcode scanner settings...

USING CAST



1953

c1981

We wanted to analyze a collection by publication date but needed normalized data (as in, data we could sort)

```
CAST(Evaluate('regexp_substr(%1,"([1]\d{3}|20[0123]\d)", 1,1)', "Bibliographic  
Details"."Publication Date") as SMALLINT)
```

This formula removes initial alphabetical characters (the Evaluate statement)

Then, it changes the remaining characters into integers:

```
CAST "Bibliographic Details"."Publication Date" as SMALLINT
```

ONE FINAL TIP:
“IMPORTING” DATA FROM ALMA SETS INTO
ANALYTICS





We know that we can't access set data from Alma in Analytics (boo!)

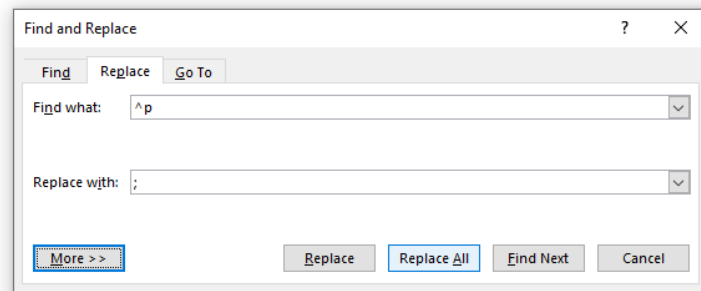




We know that we can't access set data from Alma in Analytics (boo!)

However, if you export a set from Alma,

9917408486802636
9917408456802636
9917387776802636
9913053326802636
995038786802636
9912949016802636
9912650896802636
9912448146802636
997150396802636
9913213366802636
9913352966802636
9913350906802636
9913203616802636
9913207706802636



Paste data* into Word
as unformatted text

Ctrl+H (Replace)

Find: ^p

Replace with ;

*MMS IDs, barcodes

9917408486802636;9917408456802636;9917387776802636;9913053326802636;995038786802636;9912949016802636;9912650896802636;9912448146802636;997150396802636;9913213366802636;991352966802636;9913350906802636;9913203616802636;9913207706802636;9913203646802636;9913203636802636;9913203656802636;9913514326802636;9913517486802636;9913518026802636;9913526706802636;9913754236802636;9913280336802636;9913279956802636;9913279976802636;991327996802636;9912516326802636;9913356356802636;993429826802636;996034826802636;9913202306802636;9913614646802636;9913614656802636;9911930986802636;9911333166802636;9913841386802636;9916644356802636;9911552986802636;992573496802636;9916642356802636;9916641456802636;9916641466802636;9916641476802636;998216946802636;9912479146802636;994348036802636;993422236802636;9916659896802636;992799156802636;996738006802636;99424996802636;996455236802636;995757676802636;996648956802636;995215866802636;992552026802636;9912670456802636;9912488496802636;993880666802636;9913330536802636;996068336802636;996832586802636;995266016802636;994783386802636;993996196802636;996658856802636;995333446802636;996259196802636;992532316802636;996180616802636;994582706802636;993490756802636;9913324396802636;993426376802636;9913711146802636;992263206802636;992960566802636;996462436802636;9916652306802636;996502876802636;994996536802636;996949216802636;993266646802636;996405276802636;994067066802636;994205796802636;994406226802636;996400516802636;995408276802636;993393186802636;993034476802636;996451096802636;996426646802636;9913459636802636;994566526802636;993249596802636;996367776802636;994262646802636;9913670206802636;996650446802636;993431776802636;9913448716802636;993154476802636;994975826802636;99131959

PASTE IN AS MMS ID IN ANALYTICS

Questions?



THANK YOU!

julene.jones@uky.edu

willemsen@gonzaga.edu