

Lesson 3: Viewing and Altering Other Created Reports

In addition to the out-of-the-box reports, Alma can run reports created at any of the Ex Libris member institutions. Keep in mind that the data is from your library, not from the library that created the report. Often these reports do not produce results because of differences in coding the data, however, they can still be useful as learning tools to create your own queries and reports.

In Alma Analytics, click on “Catalog.” Go to Shared Folders>Community>Reports to see a list of Ex Libris member institutions who have contributed reports for others to use. Click the institution’s name to see their reports in the center panel. Click the “Expand” link if they have a folder of queries.

Do Activities 3-1 and 3-2.

You saw in activity 3-2 how someone else’s query may not work by simply opening the report.

Filters

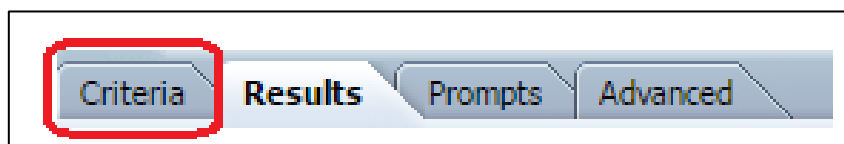
Receiving Date And Time is between **TIMESTAMPADD(SQL_TSI_DAY, -120, CURRENT_DATE)** and **CURRENT_DATE**
and Library Name is equal to / is in **Lane Community College Library**
and Material Type is equal to / is in **Book**
and Suppressed From Discovery is equal to / is in **No**
and Permanent Call Number begins with **B**
and Process Type is not equal to / is not in **Acquisition, In Process, Technical - Migration, Transit**
and Location Name is equal to **Atlas Shelves, ESL Shelves (LC Call No.), Main Display, Main Stacks, New Book Shelf, O**

[Edit](#) - [Refresh](#)

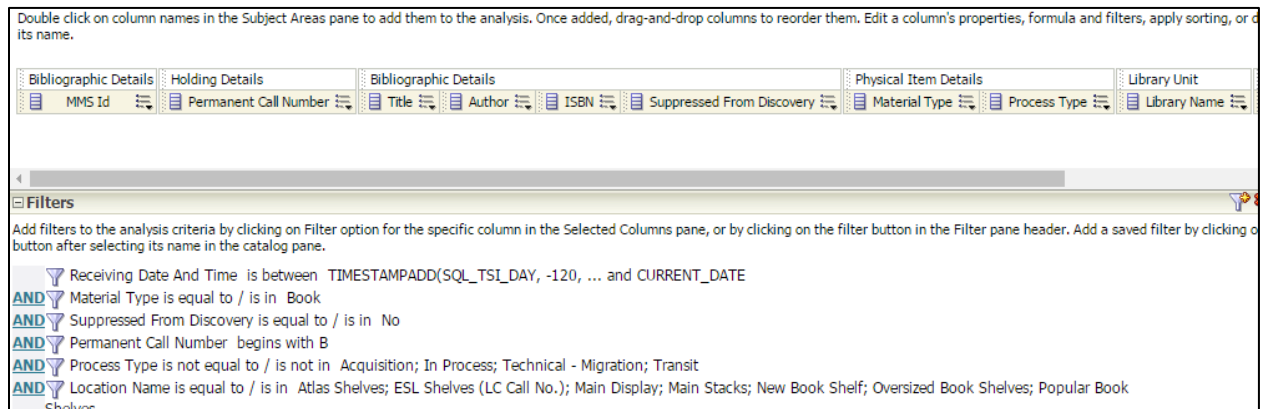
If you aren’t there now, go to Shared Folders>Community>Reports find Lane Community College. Find their New Books report and click the Expand link. Open the report.

In looking at the failed report, you are viewing the criteria used by this campus to find the material they wish to see. It must be at their institution; it must be a book. This query is searching in the philosophy section, so they want the call number to start with B.

To use this, we would have to change the query so it will work with a different discipline in your library. Click the Edit link in the lower left corner. Now click the “Criteria” tab in the upper left-hand corner.



Now you can see a more complex interface for altering the query for your report. At the bottom are the filters. Filters define the criteria. For example, here the material type is a book and the call number must begin with B.



As you move your cursor over the filters on the bottom, you can see icons to edit, copy, paste, and delete the filter.

We are going to alter this query to make a different one that works for our library, the Pfau Library at CSU San Bernardino.

First, we will eliminate the top filter. It's a more advanced topic, so it will be explained later in the series. Click the red X to delete it.

Second, we will change the library to match our own. Click the edit icon. Now we are looking at the edit filter. Click the binoculars icon to search for the correct institution. Click the edit icon on the right and highlight and delete the other library. Click the OK button.

Highlight California State University, San Bernardino, the use the arrow to send it to the selected side. Click on Pfau Library and use the arrow to send it to the selected side. Click the OK button. Looking at the Edit Filter, click the OK button again.


Next, go down to the Permanent Call Number filter, which is set to B. Click the edit icon. For this one, we can simply delete the B and replace it with P. Click the OK button.


Then, go to the bottom-most filter, Location Name. We will change it to one of the Pfau Library's locations: Featured Books. Click the edit icon. Click the binocular icon to search. Click edit in the corner, delete the contents, and click OK. Scroll down and select Featured Books. Click OK. Click OK again in the Edit Filter window.


Lastly, Go to the filter called Suppressed from Discovery and delete it.


Having now altered the query to suit our needs, we can go to the upper left-hand corner and click the Results tab to run the query.


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

 Library Name is equal to / is in California State University, San Bernardino; Pfau Library

AND  Material Type is equal to / is in Book

AND  Permanent Call Number begins with P

AND  Process Type is not equal to / is not in Acquisition; In Process; Technical - Migration; Transit

AND  Location Name is equal to / is in Featured Books (1st Floor)

For the largest collection of queries to learn from, look at the Orbis Cascade Alliance folder or the UWisconsin folder.

Do Activity 3-3.

Activity 3-1

In Shared Folders>Community>Reports browse the reports from three different schools. Going solely by its name, do you see a report you think you would be useful to your library? Write the school and the report name below.

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Activity 3-2

Go to Shared Folders>Community>Reports find Lane Community College. Find their New Books report and click the Expand link. Open the report.

What did you expect to see?

Do you understand what you are seeing?

Can you imagine how you might use this information to create a report of your own?

Activity 3-3

Return to one of the reports you found in Activity 3-1. See if you can alter it to match you library. Results are not as important as the attempt.