

Lesson 9: Due Yesterday

At my library, we search for items that were due the day before to see if items are in the stacks. This lesson will use that daily report as an example of how to use Alma's Analytics. This lesson incorporates the materials from the previous lessons.

If this were your first query, you might be uneasy about how to begin. Remember that there is a community of users in Alma's Analytics to work from. If necessary, look at other queries in Shared Folders > Community.

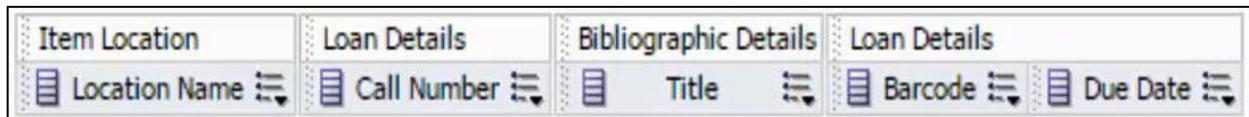
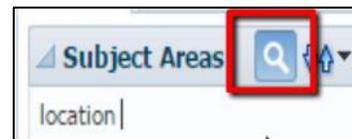


Think about what you want from your results. How should they look? Because of how we organize the searching, by floor and by call number, we will create a report that includes the:

- Floor or collection
- Call number
- Title
- Barcode
- Due Date

Click Design Analytics > New > Analysis > Fulfillment. Fulfillment is the subject for Circulation in Alma. We can see the subject area is now showing the Fulfillment tree.

There are many options. If you don't know where the field you want is hiding in your subject area, you can use the search button (a magnifying glass) to help you to find them. Some amount of playing and reviewing other institution's searches will help with some of the field names. First, we want the floor or collection, which is called location name. We can type location name in the search box and it comes up with only one answer, which can then be dragged and dropped into the Selected Columns area.



Next is the call number. Quite a few call number options appear. For most items, Call number will be the correct choice. However, some items may have a temporary call number for a display. For this kind of search, items that have been borrowed, we will use Loan Details > Call Number.

Title has a few options, but the ordinary title will work just fine, which is Bibliographic Details>Title.

Barcode is simple, with only one entry, Loan Details>Barcode.

Due date uses Loan Details > Due Date.

In summary, these are the fields we are looking to include in our report, and these are where they are located in the tree.

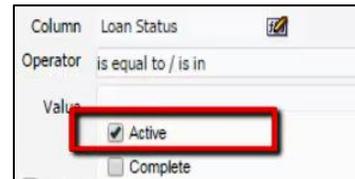
Fields in Report	Location in the Subject's Tree
Floor or collection	Item Location > Location Name
Call number	Loan Details > Call Number
Physical Item Details	Display Temporary Call Number
Title	Bibliographic Details > Title
Barcode	Loan Details > Barcode
Due Date	Loan Details > Due Date

But we also need the conditions, or filters, for this query. We will need

- Loan Status
- Process Status
- Claimed Returns

The first two are under Loan Details (Loan Details>Loan Status & Loan Details> Process Status), while the third is under Loan.

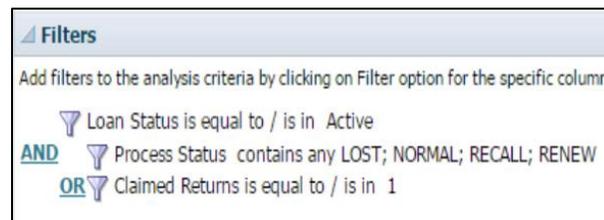
Loan status needs a filter because it is one of the criteria of the query. If you select the drop-down arrow next to value, you have the option "Active." That means it is actively loaned at the moment. Complete means it is no longer on loan.



Process Status needs a filter as well. Because it can have a variety of valid options, select the operator "contains any," which is the Boolean OR. Click the value drop-down, and select lost, normal, recall, renew. Click OK. Process status means that, in addition to being actively checked out, it could be lost, recalled, renewed. In any case, it means the item has not yet been returned.

But what about items that were claimed returned? Give it a filter where the value equals 1, which simply means it was reported returned.

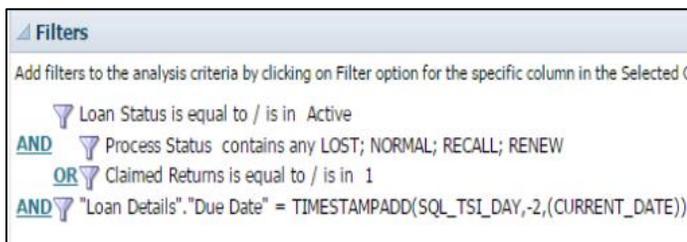
Notice the Boolean AND in the filters panel. We want items that have either been lost, recalled, renewed, or claimed returned. To change that AND to an OR, click on it. It is indented to indicate it is ORing with the filter above.



Finally, we want to see the items that were due yesterday, but have not been returned. At this point, we encounter a problem with Ex Libris's updating of Alma's Analytics. Because they choose to update during business hours, instead of a more customer service oriented time such as when we are closed, looking at the previous day will never be correct. If the analytics update

happens from 5 pm to 9 pm, no returns after 5 pm will be included in Analytics. The only way to partially overcome this poor scheduling, is to look at items due two days ago. It will still lack those that were turned in after 5 pm the previous day, but at least we can be sure the items were not turned in on the actual due date.

Go to Due Date and add a filter. Click the checkbox next to “Convert this filter to SQL.” We can now use the Timestampadd function we learned in the last video. Except this time, we will put -2 so we see items due two days ago.



"Loan Details"."Due Date" = TIMESTAMPADD(SQL_TSI_DAY, -2, (CURRENT_DATE))

If we run the query, we can see that Loan Status, Process Status, and Claimed Returned probably don't need to be seen in the report. If we want to remove them from being visible while still using the filters, we can delete them from the Selected Columns panel. You see that the filters still exist in the Filters panel.

Run it again. We could give it a title, sub-title, and provide the run date on the report. You can see a preview here. Click “Done.”

Location Name	Call Number	Title	Barcode	Due Date
3rd Floor	F1008 .C2 1993	Canada /	30630005049810	4/11/2017
4th Floor	PR3069.TS K3 1982	Shakespeare and the shapes of time /	30630002978904	4/11/2017
	PR830.Y68 S38 2000	Exploring Harry Potter /	30630009165760	4/11/2017
5th Floor	LB1576 .T657 2010	Literacy for the 21st century : a balanced approach /	30630009250174	4/11/2017
	MT95 .P675 1994	Opera 101 : a complete guide to learning and loving opera /	30630006768806	4/11/2017
Curriculum Texts (5th Floor)	Text Read Gr. PP MLP 1973	The queen and I	30630002741526	4/11/2017
Juvenile Collection	P27.C8185 B1 1999	My big lie /	30630006598781	4/11/2017
Thesis Room	QP364.7 .B877 1997 OVERSIZE	Effects of MDL-72222 on cocaine- and morphine-induced conditioned place preference in preweanling rats /	30630006045874	4/11/2017

You can move columns in the result to make it display correctly. Then “save as” in your personal folder or your library’s folder. When it’s truly refined, share it with everyone in the community. You can make is a scheduled report and you can give it the ability to subscribe with job function, through e-mail, or using widgets.

For more information about the fulfillment fields, there is a table explaining these fields can be found on the Knowledge Center at:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Analytics/100Fulfillment](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/100Fulfillment)

There are ways around the analytics update problem by using sets, which will be covered in a later video.

