Alma Analytics

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Introduction

Alma Analytics enables you to run reports on library activities. You can use out-of-the-box reports that are provided by Ex Libris or you can create your own reports. Groups of reports can be displayed in dashboards that you customize. You can share reports and dashboards that you create with other Alma users in your institution or in other institutions. These reports help you understand the activities that your library performs, which allows you to make informed decisions on how to run the library.

Alma Analytics is built on Oracle Business Intelligence Enterprise Edition 11.1.1.5. This document describes unique aspects of this tool for Alma customers and basic analytics activities. For a thorough description of all the activities available in Alma Analytics click the Help button to view the online help and Oracle documentation or refer to the Oracle® Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1) at http://docs.oracle.com/cd/E21764_01/bi.1111/e10544/toc.htm

This document describes how to perform basic activities such as building, formatting, and customizing Alma reports and how to provide reports to others, both internally and externally, by creating and updating dashboards.

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Terminology

General Terminology

The following table describes various terms used in this document:

Table 1. Terminology

Term	Description
Subject Area	Data in Alma Analytics that is organized into subject areas such as Funds Expenditure, Fulfillment, Users, Fines and Fees, and Physical Items. Subject areas contain folders, measure columns, attribute columns, and hierarchical columns.
Fact Table	Consists of the measurements, metrics, or facts related to a business process and contains the core part of the subject area.
Dimension	Tables that contain descriptive attributes (or fields) that are typically textual fields or discrete numbers behaving like text. Dimension attributes such as Library Code, Vendor Name, or Loan Date give facts a context.
Measure Column	A column of data in subject areas that holds a simple list of data values that can change or can be counted or aggregated in some way.
Attribute Column	A column in subject areas that holds a flat list of values that are also known as members. No hierarchical relationship exists between these members, as is the case for members of a hierarchical column
Hierarchical Column	A column that holds data values that are organized using both named levels and parent-child relationships. This column is displayed using a tree-like structure. Individual members are shown in an outline manner, with lower-level members rolling into higher-level members.

Table 1. Terminology

Term	Description
Is Prompted	Valid for a column containing text, numbers, or dates and is used to include only those records in the column where no pre-filtered values are desired.
Prompt User	Valid for a column that contains text, numbers, or dates and is used to enable a user to select the dashboard or report prompt operator when running the report.

Subject Area Terminology

The following section describes terms related to the subject areas:

- **Star Schema** – In computing, the star schema (also called star-join schema, data cube, or multidimensional schema) is the simplest style of data warehouse schema. The star schema consists of one or more fact tables that references any number of dimension tables.
- **Subject Area** – The data in Alma Analytics is organized into subject areas or Data Marts. Funds Expenditure, Fulfillment, Users, and Fines and Fees are examples of subject areas.

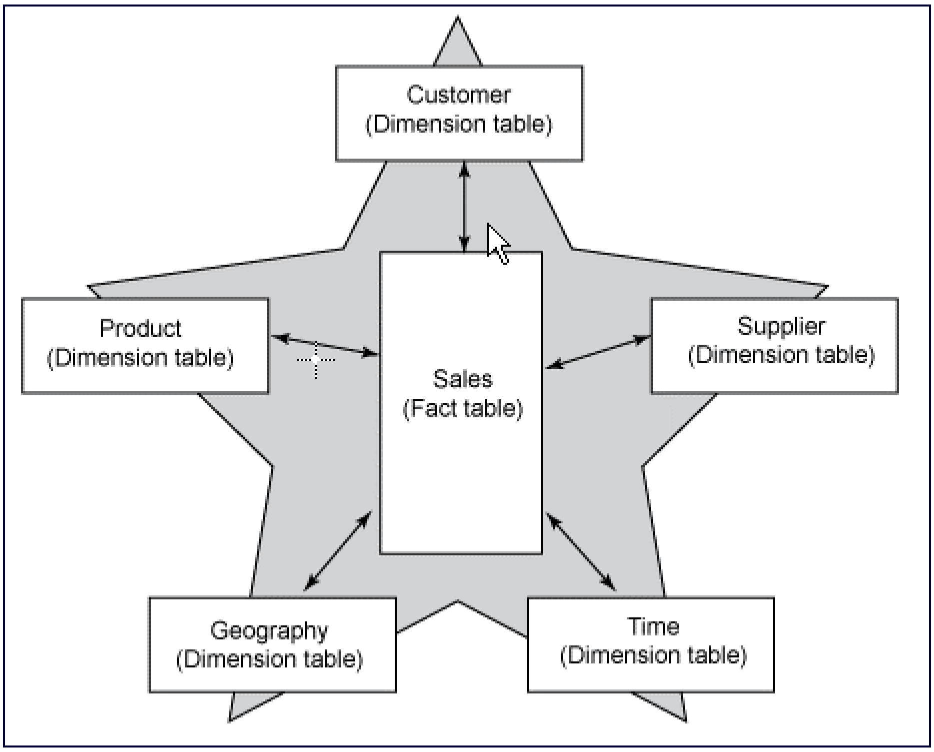

Figure 1: Star Schema

- **Fact Table** – Each Fact table consists of the measurements, metrics, or facts of a business process. Often, the Fact table is located at the center of a star schema and is surrounded by Dimension tables. Each Fact table contains the core part of a subject area such as fund transactions or user loans. The relationship between a Fact table and its Dimension tables is one to many. For each entry in a Fact table, there is one record in the Dimension table.
- **Dimension Table** – Each Dimension table contains descriptive attributes (or fields) intended to give context to a Fact table. Typically, descriptive attributes are textual fields or discrete numbers that behave like text. Examples include Library Code, Vendor Name or Loan Date. The candidate keys (normally primary keys) found in Dimension tables refer to the business facts or measures and foreign keys contained in Fact tables.
- **Attribute Column** – This is similar to a column in a table in a relational data source. It holds a simple list of members which function as attributes, similar to a dimension. Examples include Library Code.
- **Measure Column** – This is similar to a column of data in a table in a relational data source. It holds a simple list of data values. It is a column, usually in a fact table, that can change for each record and can be added up or aggregated in some way. Examples include Transaction Amount.

- **Hierarchy Column** – The Hierarchical column holds lists of individual members that are shown in outline form. This means that lower level members roll up into higher level members with outline totals being shown for the higher level members, for example, a specific day that belongs to a specific month that is found in a specific year.
- **Shared Dimension** – Users are able to create reports that include fields from different subject areas. To do this, the report needs to include the dimension that is shared by the different subject areas.

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The Basics of Working with Alma Analytics

This section describes basic activities that you perform with Alma Analytics such as creating reports and adding graphs to reports.

Design Analytics Role

Before you can create reports in Alma, you must be assigned the Design Analytics role. After the Design Analytics role has been assigned, the following links are added to the Alma menu under Administration > Analytics:

- **Design Analytics** – Enables you to create reports/dashboards
- **Configuration Menu** – Enables you to share the created reports/dashboard with other Alma users.

Navigating Alma Analytics

This section describes how to access the Alma Analytics module to create reports and the different types of columns that can be used when creating reports, including options to filter, sum, format, and sort the report.

To open the Alma Analytics Home page:

1. From the Alma Main menu, select **Analytics > Design Analytics**. The personal dashboard is displayed.

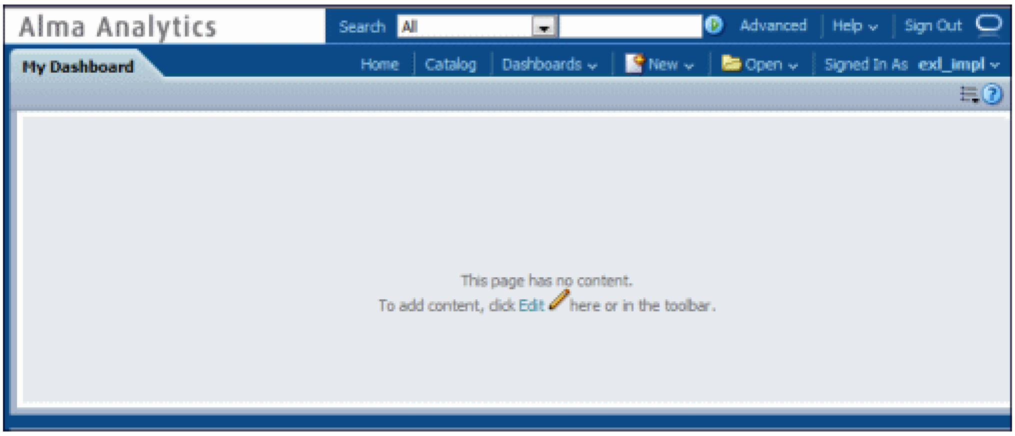


Figure 2: Dashboard

2. Click the **Home** link. The following is displayed:

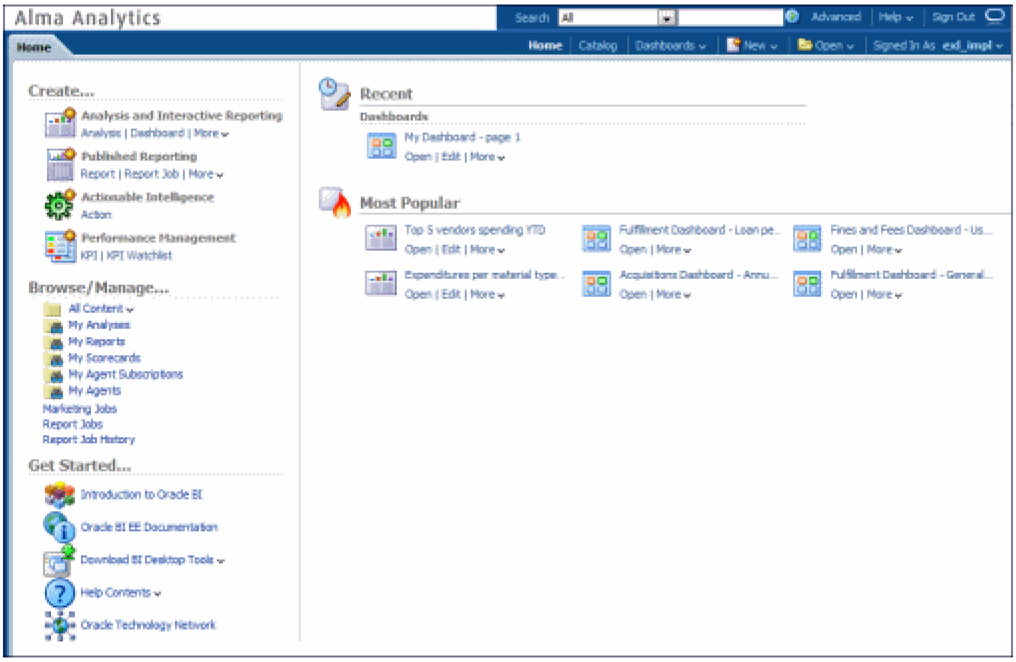


Figure 3: Home Page

The Home page is a task-oriented, centralized workspace combined with a global header allowing access to Alma Analytics objects, their respective editors, help documentation, and other features.

VIDEO:
See *Tips and Tricks in Analytics* for a detailed Ask the Expert session on working with Analytics.

Global Header

The global header includes the following components:

- **Search** – Enables you to search the catalog.
- **Advanced** – Displays the Catalog page in search mode where you can search for objects in the catalog. In search mode, the Search pane is displayed rather than the Folders pane within the page.
- **Help** – this menu provide different help options relevant for Oracle BI and not specifically for Alma analytics. It includes the following options:
  - **xxx Help** (where xxx is the name of the page, editor, or tab) – Dynamically changes to display the Help topic for the current page, editor, or tab
  - **Help Contents** – Displays a cascading menu that provides options that link to the tables of contents for Oracle BI EE
  - **Documentation** – Displays the documentation library for Oracle BI EE
  - **OTN** – Displays the Business Intelligence and Data Warehousing Technology Center page on the Oracle Technology Network (OTN)
  - **About Oracle BI EE** – Displays a dialog identifying the Oracle BI EE version and copyright information
- **Sign Out** – Signs you out of Alma analytics
- **Home** – Displays the Home page
- **Catalog** – Where all reports are saved including personal and shared reports.
- **Dashboards** – A shortcut to all available dashboards that are saved in the dedicated dashboard subfolders.
- **New** – Displays a list of the objects that you can create. To create an object, select it from the list. The appropriate dialog or editor is displayed for you to create the object. The first option under this menu – Analysis – is used to create a new report.
- **Open** – Displays the following options:
  - **Open** – Displays the Open dialog where you can select the object with which you want to work
  - **Recent Objects** – Displays a list of the objects that you have recently viewed, created, or updated. You can use this list to select an object with which you want to work.

  - **Most Popular Objects** – Displays a list of the objects that are accessed the most often by the users that are assigned to the groups to which you belong. You can use this list to select an object with which you want to work.
- **Signed In As username** – Displays the following (where `username` is the user name that your current session is using):
- **My Account** – Displays the My Account dialog where you can specify your preferences such as time zone, delivery devices, and delivery profile.

Throughout Alma Analytics, common icons have been employed for objects. The table below contains some of the most commonly used object icons in this guide.

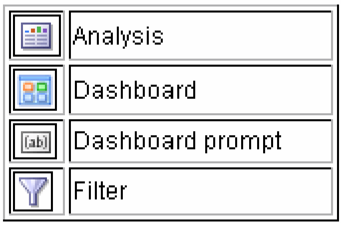


Figure 4: Analytics Icons

Running Out-of-the-Box Reports

You can run reports whose criteria have been created by Ex Libris.

To run an out-of-the-box report:

1 Click **Catalog**. The Catalog page is displayed:

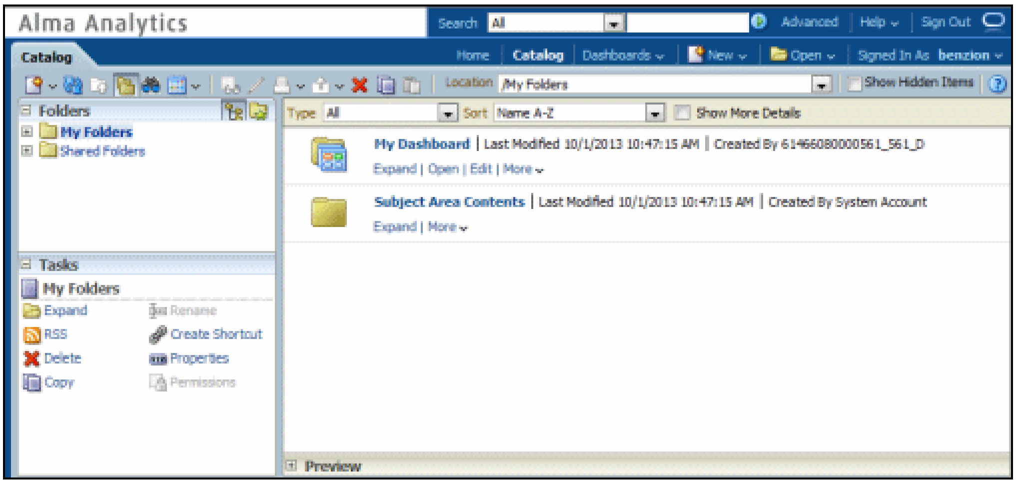


Figure 5: Catalog Page

On the left of the catalog page is the Folders pane. The My Folders folder contains any reports that you created. The Shared Folders folder contains:

- Reports created by Ex Libris (OTB)
- Reports shared between users in your institution
- Reports shared by other institutions (found under the Community folder). Reports are shared across all regions via a weekly sync that is run each Friday. You can copy shared reports to your folders and make local modifications. (Note that if you want to make changes to a shared report you must save it under a different name so that you do not override a report created by someone else.)

2 Click the expand buttons next to **Shared folders** > **Alma** > **Fulfilment** (for example) > **Reports**. The out-of-the-box reports for the Fulfillment subject area are displayed:

Figure 6: Fulfillment Reports

3 Click **Open** for the report you want to run.

Creating a New Report

You can create new reports to provide you with information on library activities. The simplest way to create a report is based on one subject area. There are cases in which you need to combine data from more than two subject areas, which is a more complex process that requires understanding of the data dependencies. (For more information on creating a report from two subject areas, see **Creating Advanced Custom Reports** on page **36**).

NOTE:
Analytic reports can have a maximum of one million cells.

The following subject areas are available. For more information on each subject area, see the section later in this document concerning it:

- **Funds Expenditure** on page **141** – provides fund transactions details (allocation, expenditure and encumbrance) combined with PO and invoice data
- **Fulfillment** on page **167** – provides detailed loan history information
- **E-Inventory** on page **191** – provides detailed electronic inventory related information (for example, packages, portfolios, and services)

- **Physical Items** on page **205** (formerly Inventory) – provides detailed print inventory related information (for example, titles, holdings, locations)
- **Borrowing Requests** on page **221** – provides details on the borrowing side of ILL requests
- **Lending Requests** on page **229** – provides details on the lending side of ILL requests
- **Usage Data** on page **237** – provides COUNTER related data – currently supporting DB and Journal reports
- **Cost Usage** on page **245** – combines cost data derived from PO line and usage taken from COUNTER
- **Fines and Fees** on page **249** – provides patron related fines and fees information
- **Events** on page **257** – a generic area to investigate events triggered in Alma (almost any activity in Alma creates an event. For example, each time an MMS is created, updated, or deleted an event is generated.)
- **Users** on page **265** – provides detailed information on users (for example, details, contact information, and roles)
- **Requests** on page **275** – provides detailed information on requests (for example Request Date, Pickup Location, and Material Type Description)

Creating Basic Custom Reports

The most straightforward way to create a report is using one specific subject area. Creating reports using one subject area does not require any deep knowledge of the data structure and relationship of the star scheme.

The following is a basic example of how to create a report:

To create a report:

1 Select **New > Analysis**. The Select Subject Area menu opens.

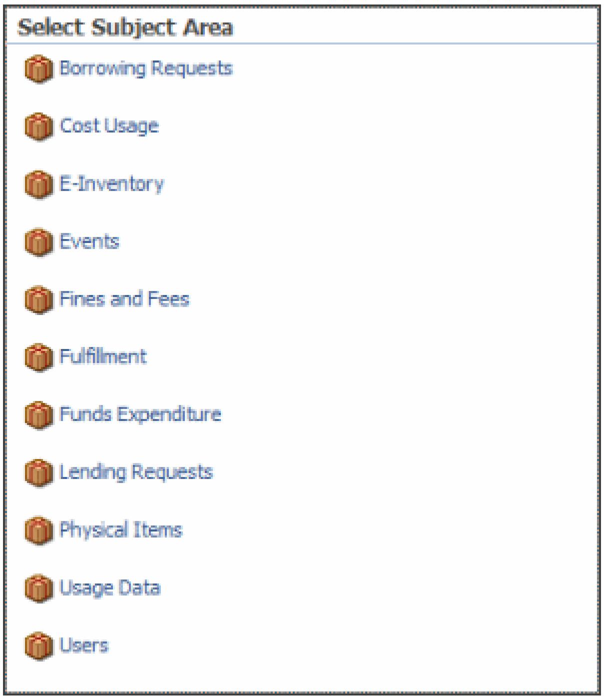


Figure 7: Select Subject Area Descriptions Menu

2 From the Select Subject Area menu, select **Funds Expenditure** (for example) to open the Analysis Editor.

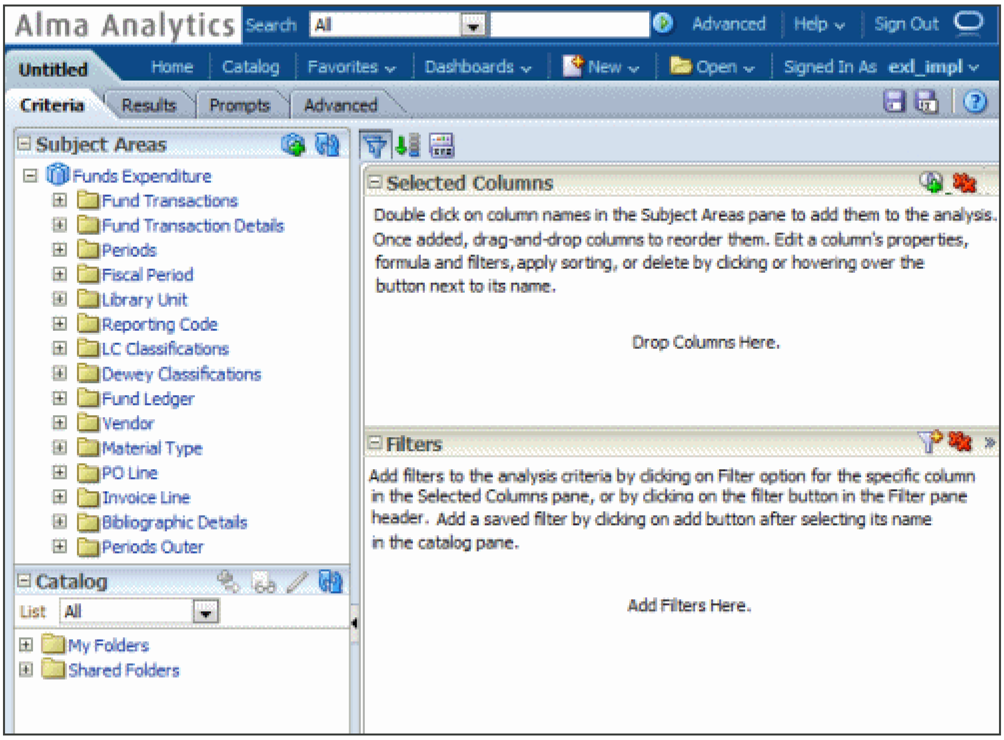


Figure 8: Analysis Editor

In the pane on the left the columns of the Funds Expenditure area are displayed:

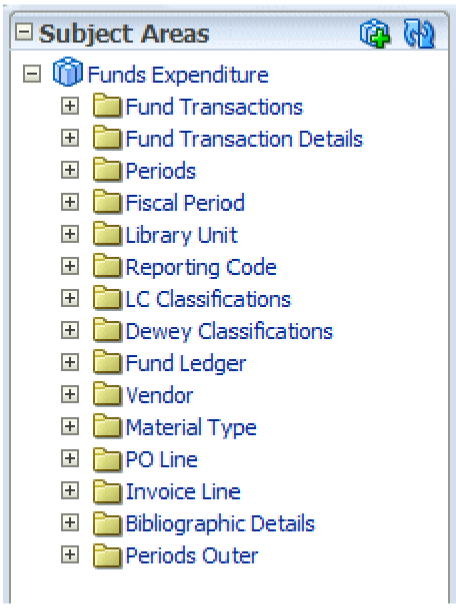


Figure 9: Funds Expenditure Area

3 Click the plus sign (+) next to Library Unit to expand the Library Unit folder and double-click **Library Name** to add it to the Selected Columns pane.

4 Click the plus sign (+) next to the Vendor folder and double-click **Vendor Name**.

5 Click the plus sign (+) next to the Fund Transactions folder and double-click **Transaction Amount**.

The selected columns should appear like the following:

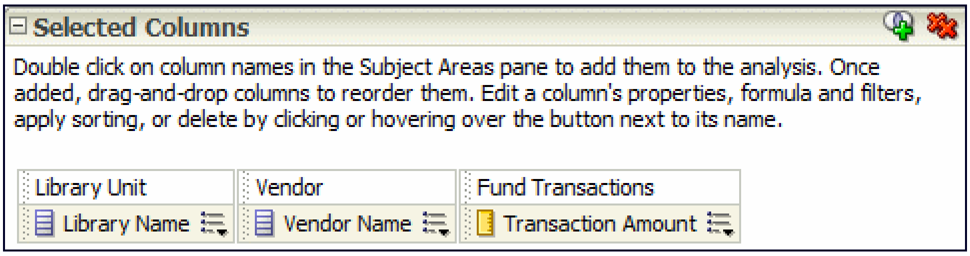
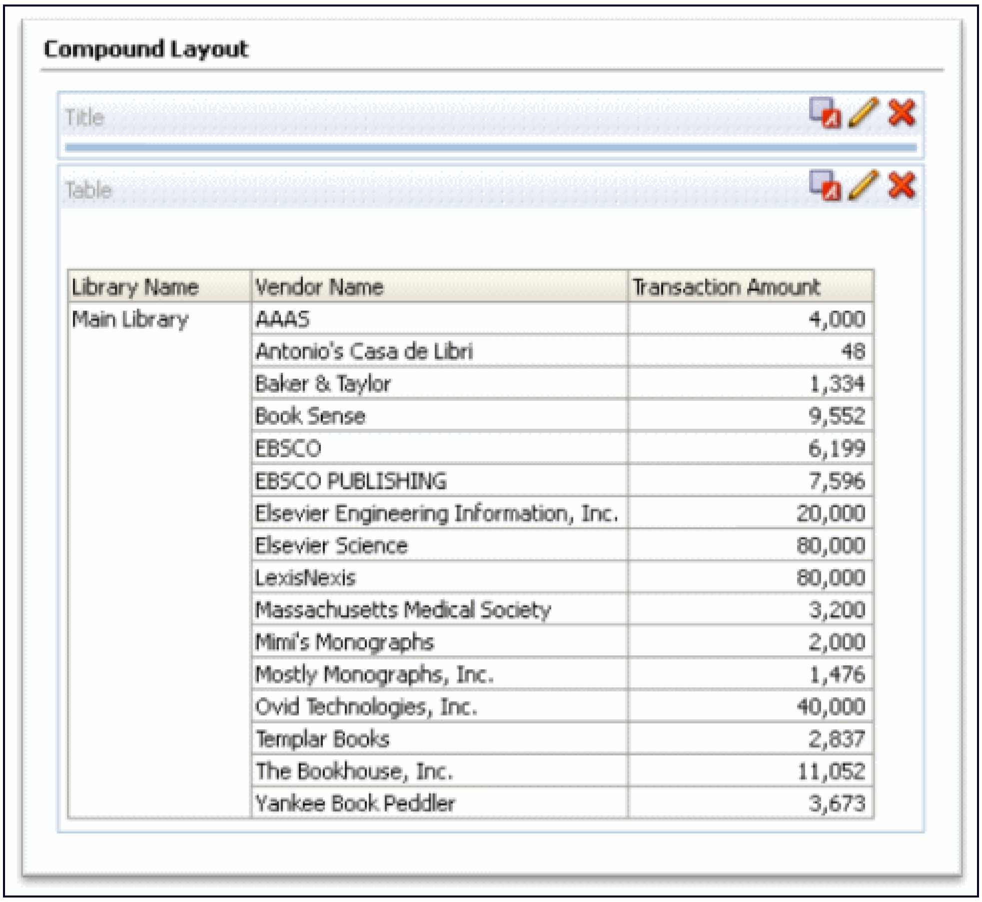


Figure 10: Select Columns

NOTE:
You can reorder the columns in your report by clicking and dragging them.

6 Click the **Results** tab to see the report results:



Library Name	Vendor Name	Transaction Amount
Main Library	AAAS	4,000
	Antonio's Casa de Libri	48
	Baker & Taylor	1,334
	Book Sense	9,552
	EBSCO	6,199
	EBSCO PUBLISHING	7,596
	Elsevier Engineering Information, Inc.	20,000
	Elsevier Science	80,000
	LexisNexis	80,000
	Massachusetts Medical Society	3,200
	Mimi's Monographs	2,000
	Mostly Monographs, Inc.	1,476
	Ovid Technologies, Inc.	40,000
	Templar Books	2,837
	The Bookhouse, Inc.	11,052
	Yankee Book Peddler	3,673

Figure 11: Compound Layout

Filtering a Report

Filters allow you to limit the amount of data displayed in the report and are applied before the report is aggregated. Filters affect the report and, thus, the resulting values for measures. Filters can be applied directly to attribute columns and measure columns.

To filter a report:

1. Click the More Options icon next to the column whose data you want to filter and select **Filter**. (Alternatively, click the **Filter** icon and select the appropriate column from the drop-down list.)

   The New filter dialog Box is displayed:

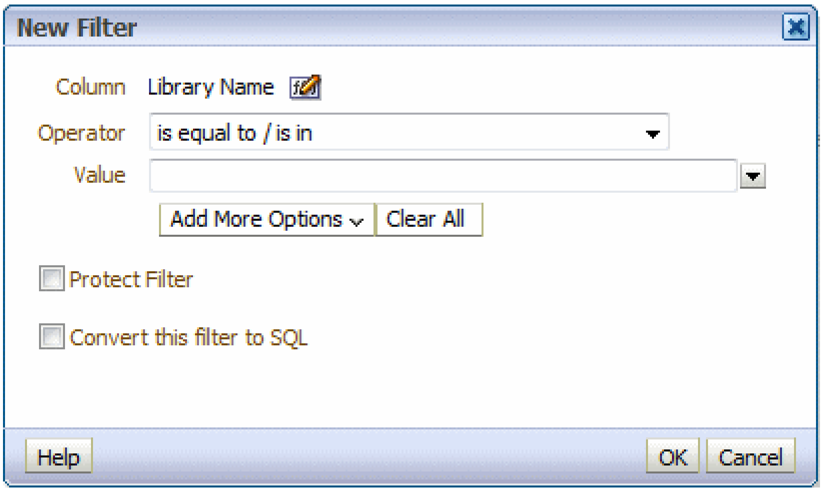


Figure 12: New Filter

2 Select an option from the **Operator** drop-down list.

3 Enter a value in the Value field.

The filter is displayed at the bottom of the Filter pane.

4 Click the Results tab to display the results filtered according to the criteria you set.

Sorting a Report

You can sort the data in a column, for example, to be ascending or descending.

To sort a column:

1 Click the More Options icon next to the column whose data you want to sort and select **Sort**.

2 Select a sort option.

The column is sorted.

Saving a Report

After you create a report, you can save it for later use.

To save a report:

Click the Save icon to save the report. You can save the report under Shared Folders/<your institution> or if it is a private report, you can save the report in the My Folders area. After you save a report the title is displayed at the top of the report. To change the title, from the Results tab, click the Edit icon in the Views pane and enter a new title in the Title field.

Adding Totals to a Report

You can display the total of a column of a report.

To display the total of a column:

1 Click the Edit icon of the report. The Table Editor is displayed:

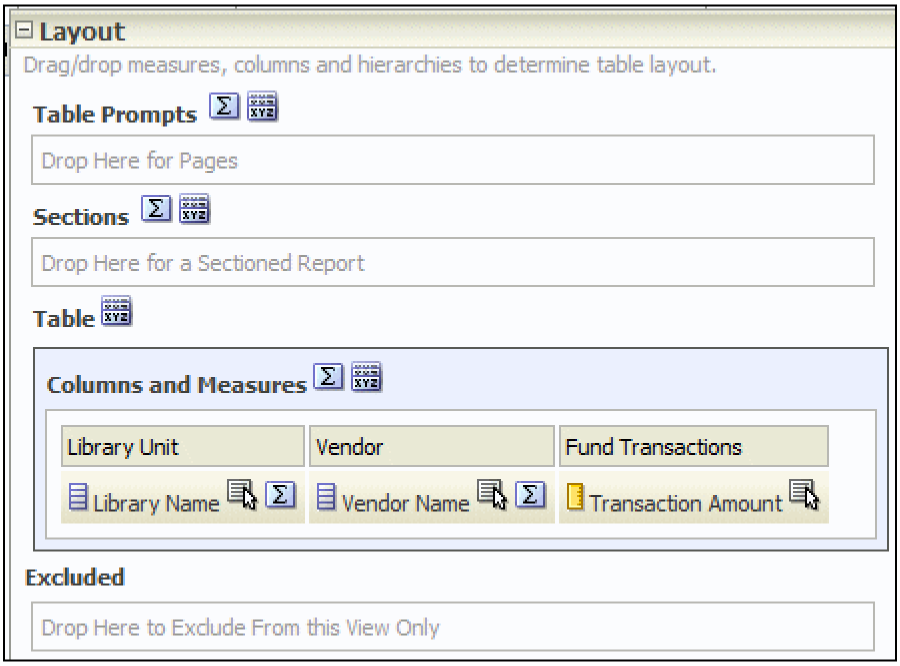
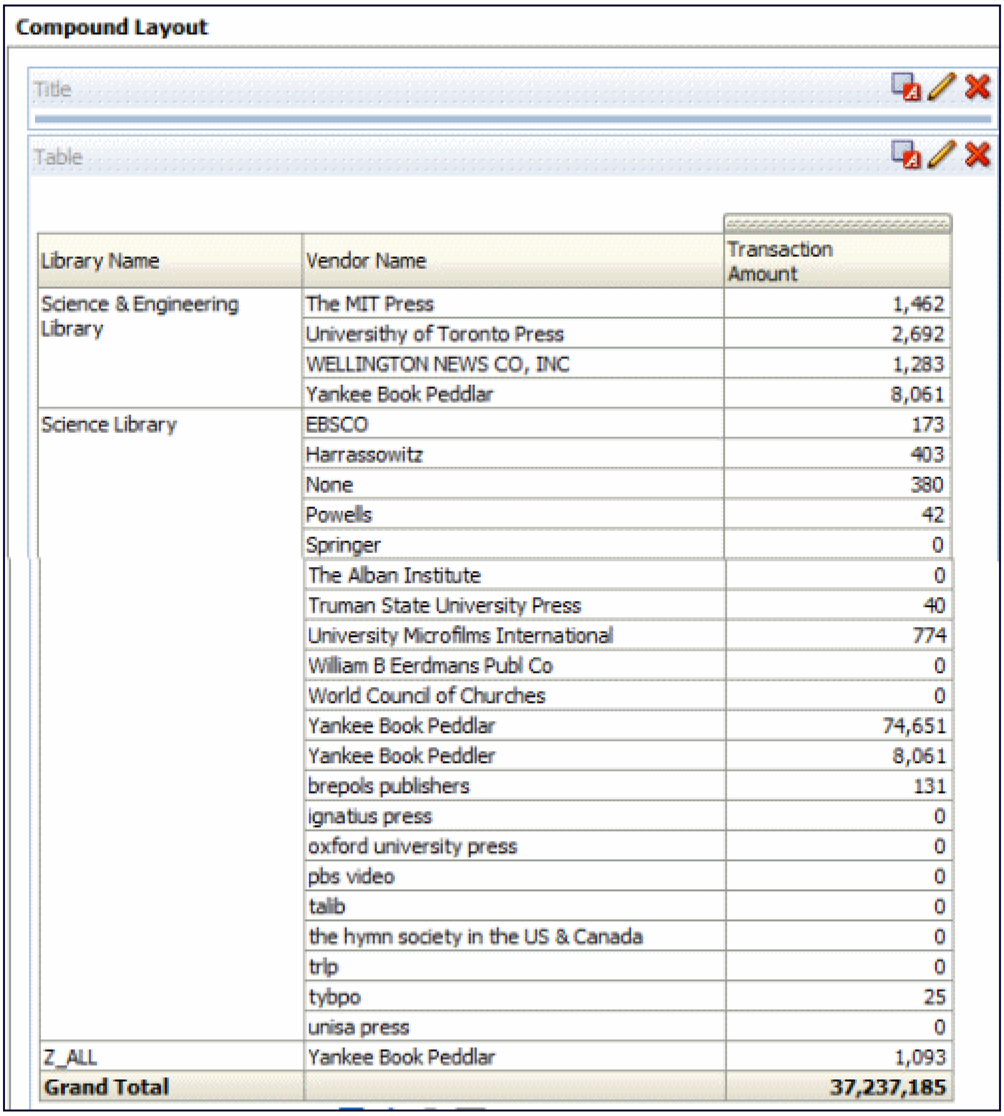


Figure 13: Table Editor

2 Click the Totals icon next to Columns and Measures and then select **After**. The green checkmark indicates that a grand total has been added to the analysis.

3 Click **Done** to apply the change. The report now is displayed with a grand total:



Library Name	Vendor Name	Transaction Amount
Science & Engineering Library	The MIT Press	1,462
	Universithy of Toronto Press	2,692
	WELLINGTON NEWS CO, INC	1,283
	Yankee Book Peddlar	8,061
Science Library	EBSCO	173
	Harrassowitz	403
	None	380
	Powells	42
	Springer	0
	The Alban Institute	0
	Truman State University Press	40
	University Microfilms International	774
	William B Eerdmans Publ Co	0
	World Council of Churches	0
	Yankee Book Peddlar	74,651
	Yankee Book Peddler	8,061
	brepols publishers	131
	ignatius press	0
	oxford university press	0
	pbs video	0
	talib	0
	the hymn society in the US & Canada	0
	trlp	0
	tybpo	25
	unisa press	0
Z_ALL	Yankee Book Peddlar	1,093
Grand Total		**37,237,185**

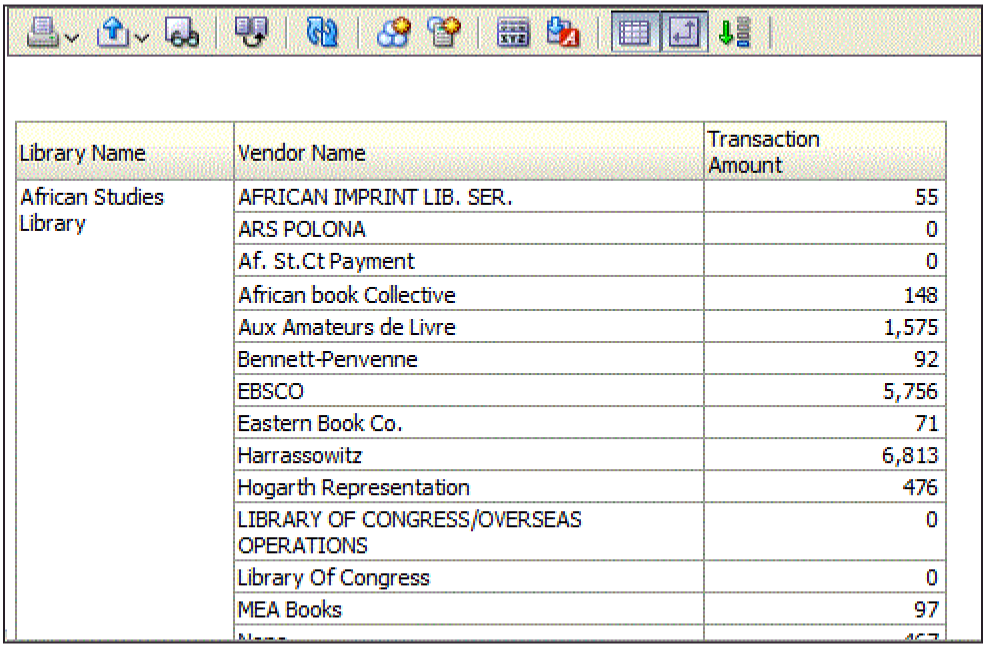
Figure 14: Grand Total

Formatting a Report

You can format a report.

To format a report:

1 From the Results tab of a report, click the edit icon . The following is displayed, for example:



Library Name	Vendor Name	Transaction Amount
African Studies Library	AFRICAN IMPRINT LIB. SER.	55
	ARS POLONA	0
	Af. St.Ct Payment	0
	African book Collective	148
	Aux Amateurs de Livre	1,575
	Bennett-Penvenne	92
	EBSCO	5,756
	Eastern Book Co.	71
	Harrassowitz	6,813
	Hogarth Representation	476
	LIBRARY OF CONGRESS/OVERSEAS OPERATIONS	0
	Library Of Congress	0
	MEA Books	97

Figure 15: Formatting a Report

2 From the top toolbar, click the Table View Properties icon . The table properties dialog box is displayed:

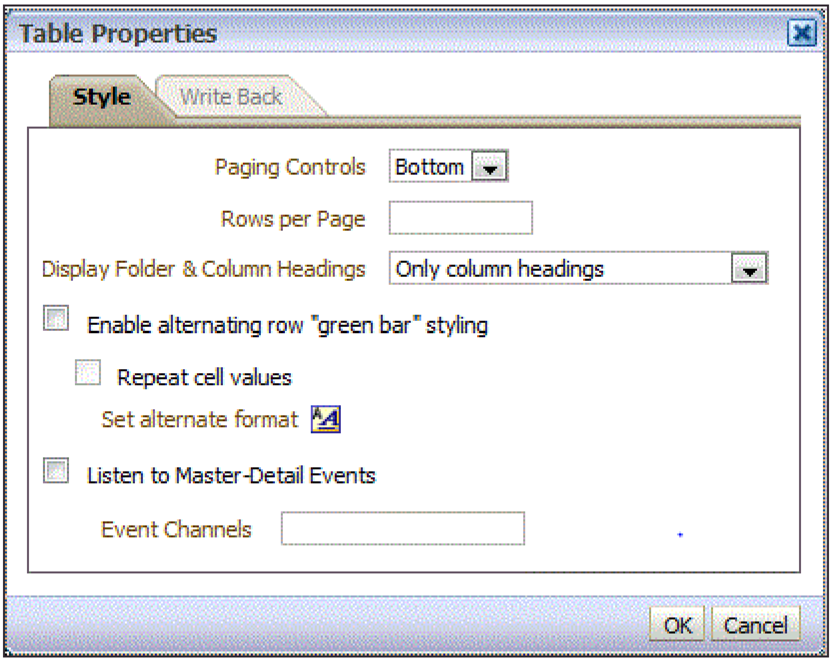


Figure 16: Table Properties

3 From the Style tab, select **Enable alternate row "green bar" styling**.

4 Select **Repeat cell values** so that the table appears with each full row in a separate color.

5 Click **Set alternate format**. The following is displayed:

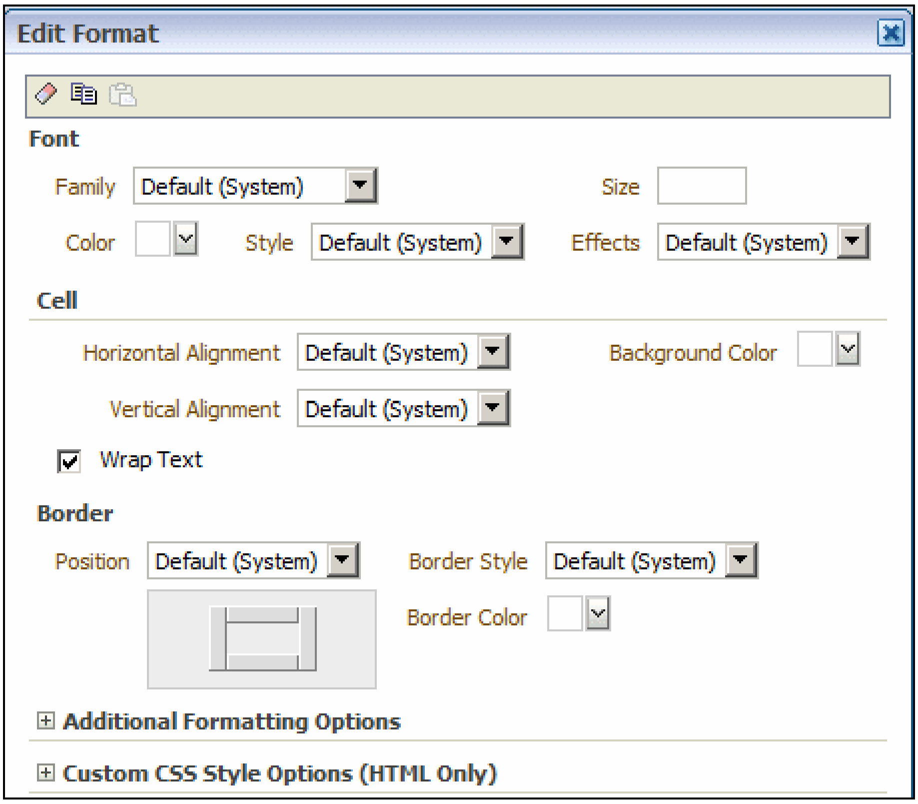


Figure 17: Edit Format

6 Select the formatting options you want, for example, from the **Background Color** drop-down list, select the yellow for the background color.

7 Click **OK**.

The table is now formatted with alternating yellow rows:

Library Name	Vendor Name	Transaction Amount
African Studies Library	AFRICAN IMPRINT LIB. SER.	55
African Studies Library	ARS POLONA	0
African Studies Library	Af. St.Ct Payment	0
African Studies Library	African book Collective	148
African Studies Library	Aux Amateurs de Livre	1,575
African Studies Library	Bennett-Penvenne	92
African Studies Library	EBSCO	5,756
African Studies Library	Eastern Book Co.	71

Figure 18: Yellow Rows

Adding a Graph to a Report

You can add a graph, such as a pie chart, to the report.

To add a graph to the report:

1 From the Results tab, click the New View icon and then select **Graph > Pie**.

A pie chart is added to the report:

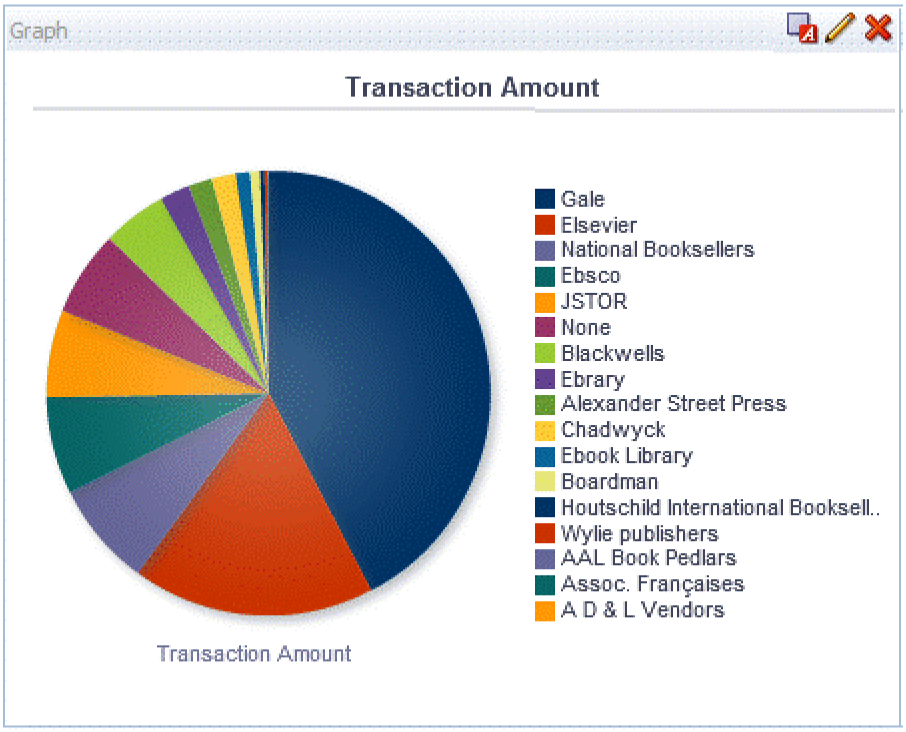


Figure 19: Pie Chart

2 Click the Remove View from Compound Layout icon for both Title and Table views. Both views are removed so that only the graph is displayed.

NOTE:
The Title and Table views are still available for use from the Views pane.

Formatting a Graph

You can format a graph. The formatting options available are different depending on the type of graph you are formatting. In this example, we format a pie graph.

To format a graph:

1 From the Results tab, click the Edit View icon . The Graph Editor is displayed:

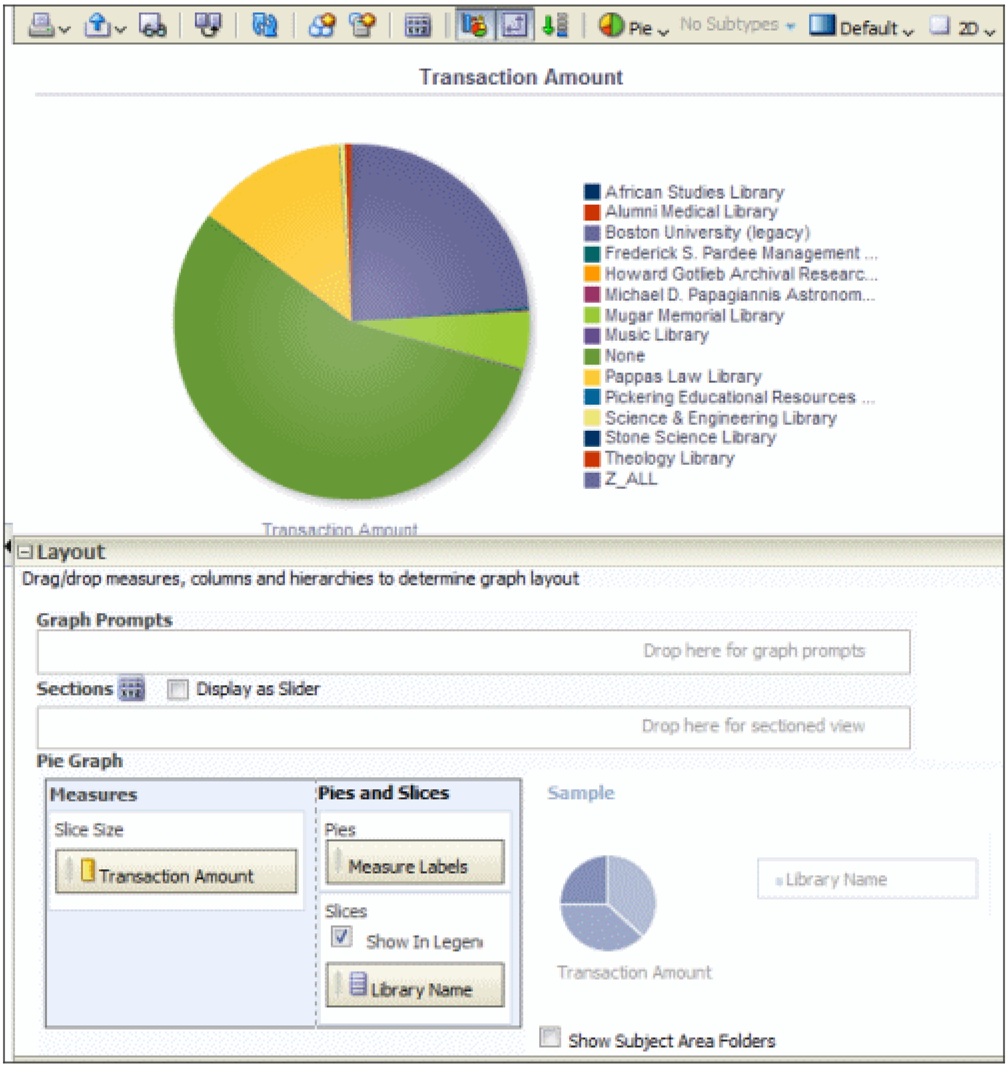


Figure 20: Graph Editor

2 Click the Edit Graph Properties icon from the top toolbar. The Graph Properties dialog box is displayed:

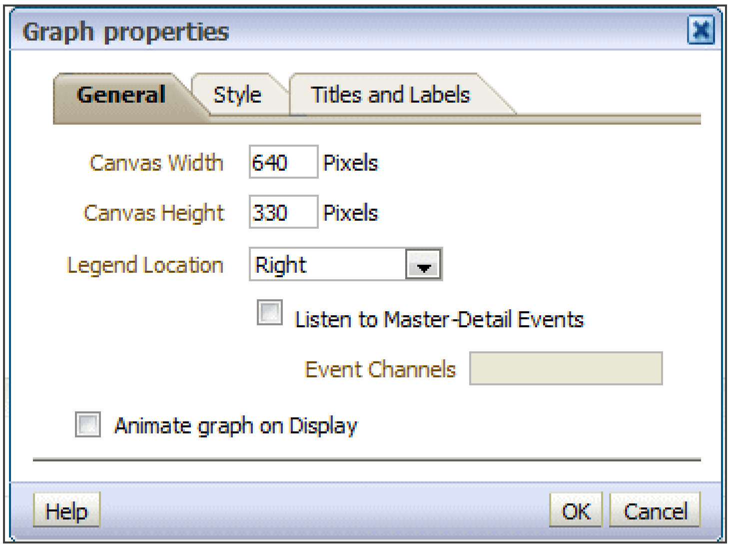


Figure 21: Graph Properties

You can change various graph properties from the General, Style, and Titles and Labels tabs. For example:

3 From the General tab, select **Left** from the Legend Location drop-down list.

4 From the Style tab:

   a From the Legend section, select gray as the background color and blue as the border color

   b From the Canvas Colors and Borders section, select turquoise and the background color and blue as the background color.

   c Clear the **Gradient** checkbox.

5 From the Titles and Labels tab:

   a Clear the **Use measure name as graph title** checkbox and enter a title such as *Transaction Amount Pie Chart*.

   b From the Labels section, click the Format Title icon  next to legend, select **Arial** from the Family drop-down list, enter `10` in the Size field, and select red as the color.

6 Click **OK**.

The graph now appears as follows:

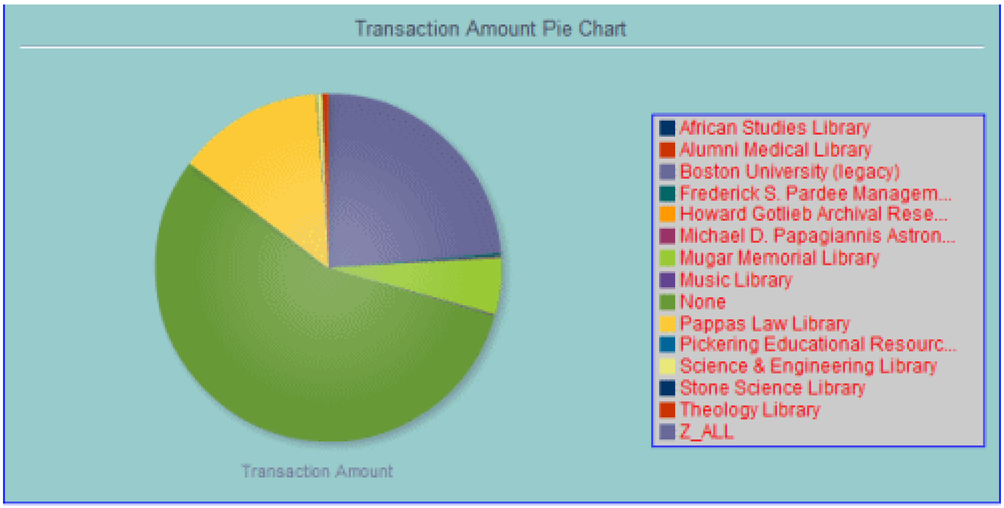


Figure 22: Customized Pie Chart

Creating Advanced Custom Reports

This section describes how to create custom reports from two subject areas.

Each subject area is composed of a fact and descriptive and measurement dimensions. The fact is the first field listed under the subject area. Measurement dimensions are preceded by yellow rectangles and are located under facts. Descriptive dimensions are preceded by gray rectangles.

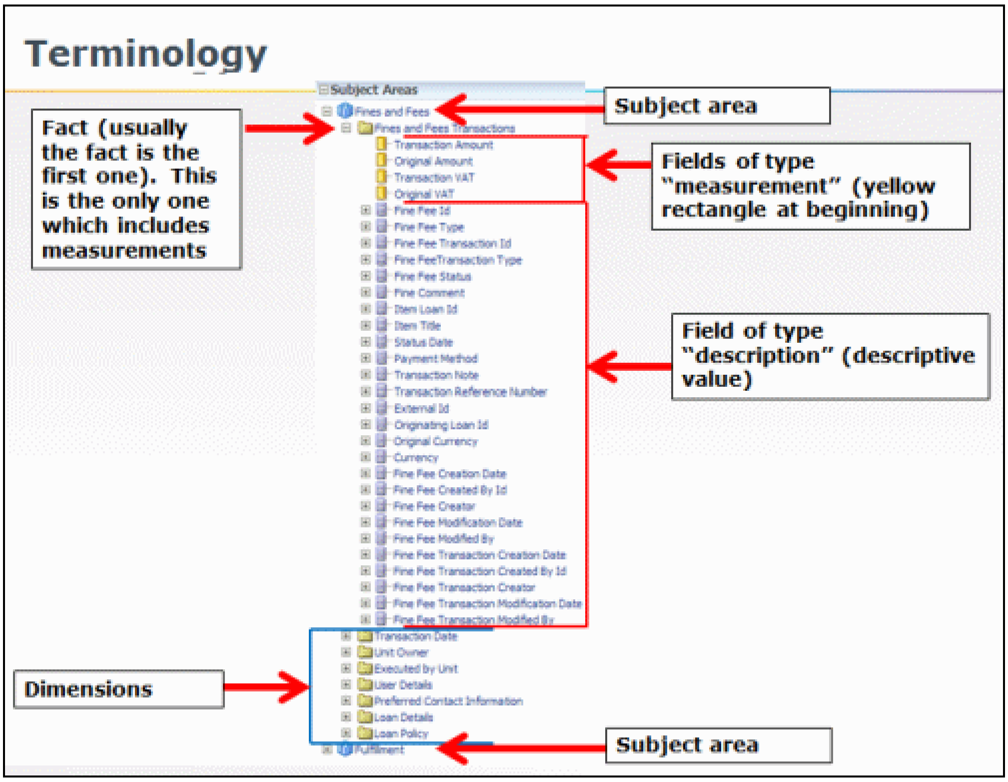


Figure 23: Terminology

You may want to include information in a report from two subject areas. In order to be able to create reports from two subject areas, the following conditions must be met:

- There must be at least one common dimension between the two subject areas.
- Descriptive fields must come from the common dimensions.

NOTE:

Measurement fields can come from the facts, although they are not common dimensions.

If you attempt to create a report from two descriptive fields that are not in common between the two subject areas, an error message similar to the following is displayed:

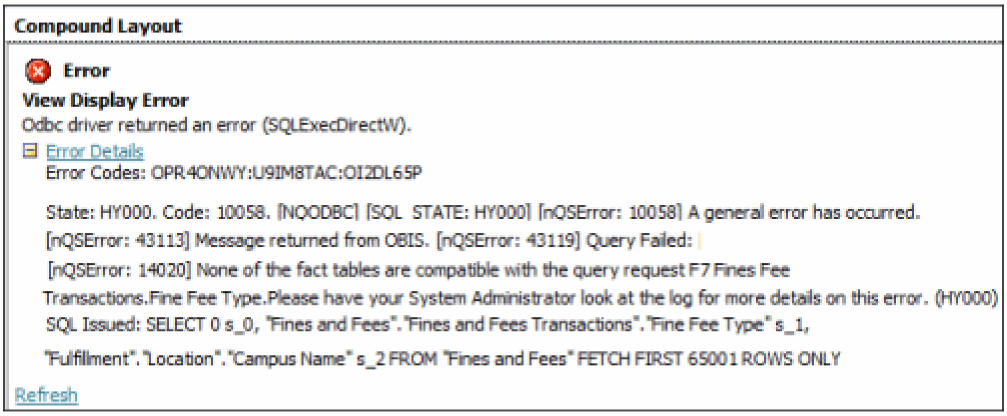


Figure 24: Error Message

In this example, we create a report from the Fulfillment and Fines and Fees subject areas.

To create a report from two subject areas:

1 Select **New > Analysis > Fines and Fees**. The Fines and Fees subject area is displayed:

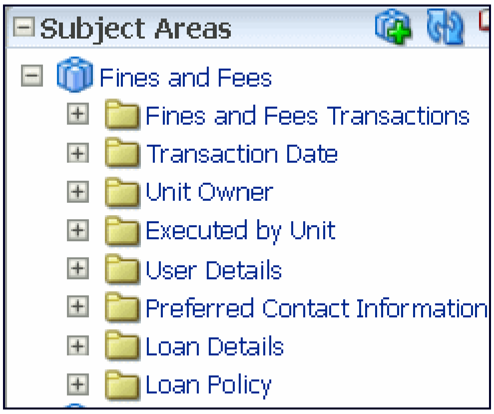


Figure 25: Fines and Fees

2 Click the Add / Remove Subject Areas icon and select **Fulfillment**. Both the Fines and Fees and Fulfillment subject areas are displayed:

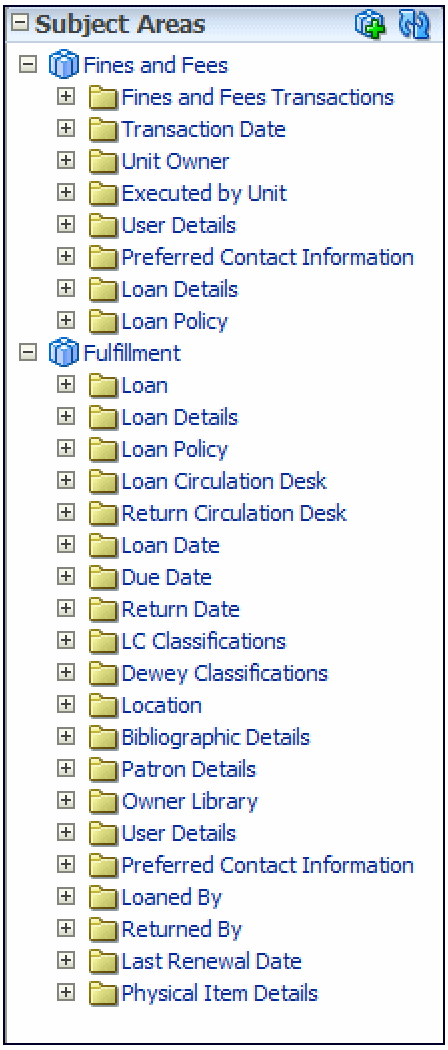


Figure 26: Fines and Fees and Fulfillment

3 The Fines and Fees and Fulfillment subject areas have the Loan Details and Loan Policy dimensions in common. Add to the report any fields from these two dimensions, as well as any measurement dimensions. For example:

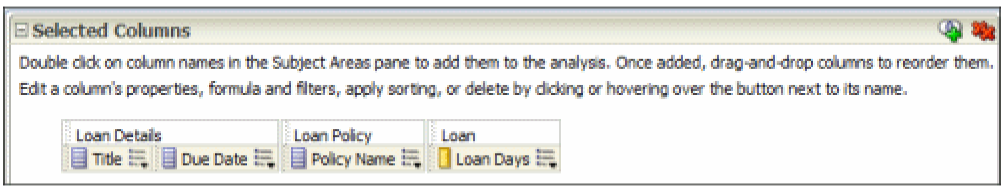
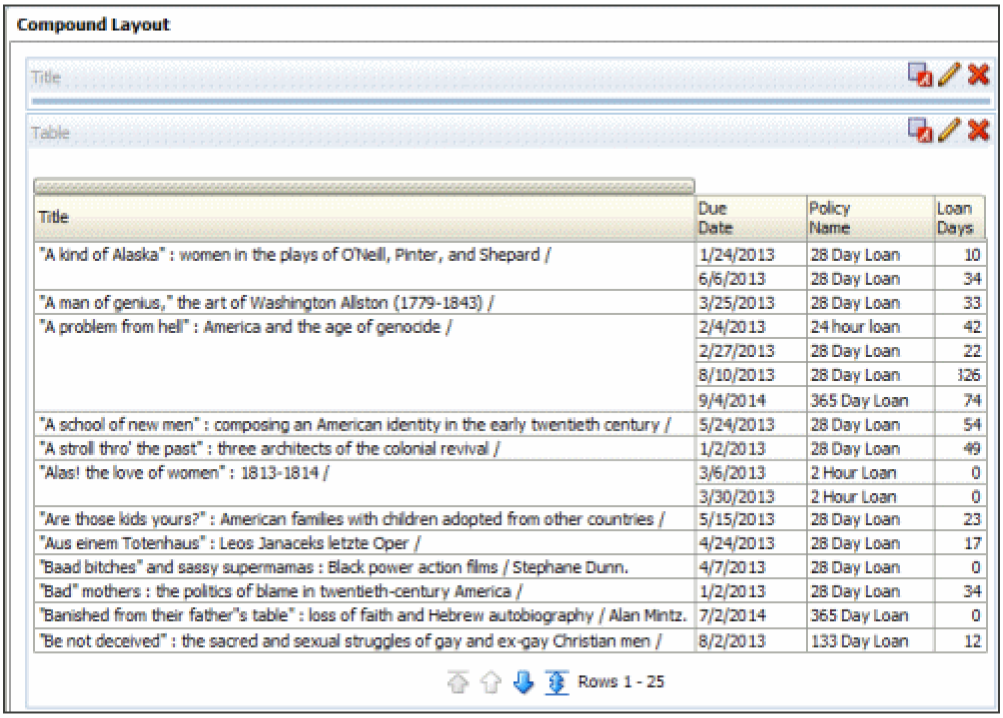


Figure 27: Report Criteria from Two Subject Areas

4 Click the **Results** tab to display the report:



Title	Due Date	Policy Name	Loan Days
"A kind of Alaska" : women in the plays of O'Neill, Pinter, and Shepard /	1/24/2013	28 Day Loan	10
	6/6/2013	28 Day Loan	34
"A man of genius," the art of Washington Allston (1779-1843) /	3/25/2013	28 Day Loan	33
"A problem from hell" : America and the age of genocide /	2/4/2013	24 hour loan	42
	2/27/2013	28 Day Loan	22
	8/10/2013	28 Day Loan	126
	9/4/2014	365 Day Loan	74
"A school of new men" : composing an American identity in the early twentieth century /	5/24/2013	28 Day Loan	54
"A stroll thro' the past" : three architects of the colonial revival /	1/2/2013	28 Day Loan	49
"Alas! the love of women" : 1813-1814 /	3/6/2013	2 Hour Loan	0
	3/30/2013	2 Hour Loan	0
"Are those kids yours?" : American families with children adopted from other countries /	5/15/2013	28 Day Loan	23
"Aus einem Totenhaus" : Leos Janaceks letzte Oper /	4/24/2013	28 Day Loan	17
"Baad bitches" and sassy supermamas : Black power action films / Stephane Dunn.	4/7/2013	28 Day Loan	0
"Bad" mothers : the politics of blame in twentieth-century America /	1/2/2013	28 Day Loan	34
"Banished from their father"s table" : loss of faith and Hebrew autobiography / Alan Mintz.	7/2/2014	365 Day Loan	0
"Be not deceived" : the sacred and sexual struggles of gay and ex-gay Christian men /	8/2/2013	133 Day Loan	12

Figure 28: Report of Two Subject Areas

Displaying Analytics Reports in Alma

You can display Alma analytics reports as a widget in the Alma home page and from the Analytics link at the top of every page. Only reports can be displayed as widgets, but both reports and dashboards can be displayed from the Analytics link.

To display an analytics report in Alma:

1 From the Alma Main menu, click **Administration > Analytics > Configuration Menu > Analytics Objects List**. The following is displayed:

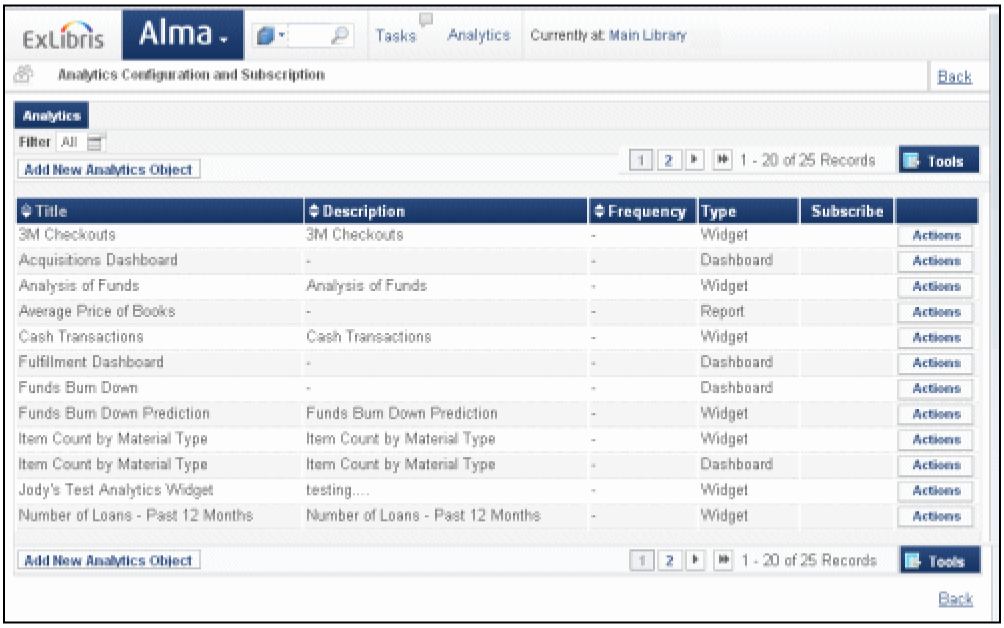


Figure 29: Analytics Objects List

2 Click **Add New Analytics Object**. The following is displayed:

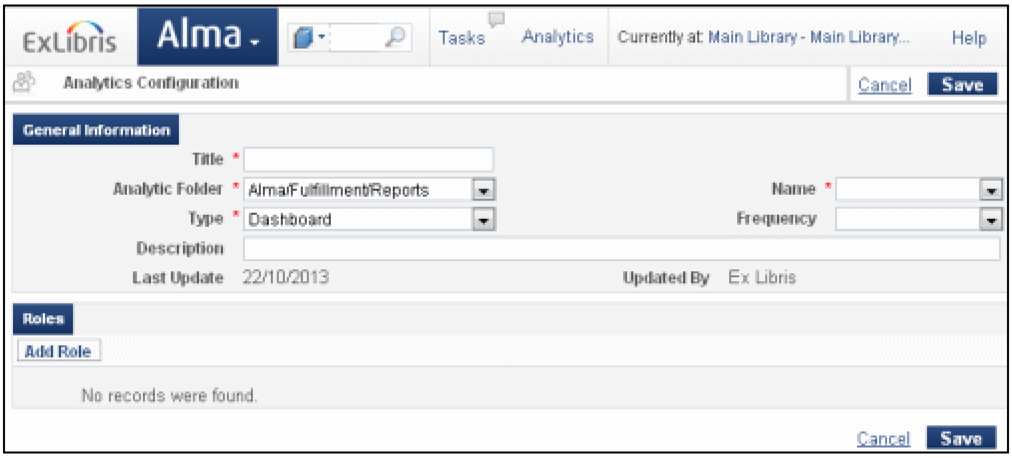


Figure 30: Add New Analytics Object

3 Fill in the following fields:

- **Title** – the title of the report or dashboard

- **Analytic Folder** – the folder in which the report or dashboard that you want to schedule is located.
- **Name** – select the name of the report or dashboard. The list of names comes from the folder you selected.
- **Type** – select one of the following from the drop-down list:
    - **Dashboard** – to display a dashboard in the Analytics link in the Alma header
    - **Report** – to display a report in the Analytics link in the Alma header
    - **Widget** – to display a widget in the widget list when clicking **Add Widget** from the Home Page.
- Description – Enter a description of the report or dashboard.

4 Click **Add Role**.

5 Select the roles for which you want to have the report or dashboard displayed.

6 Click **Add Role**.

7 Click **Save**.

If you selected to display a report or dashboard in the Alma Analytics link, the Analytics link appears at the top of every page in Alma. Click the link to display a list of reports or dashboards to display:

Figure 31: Analytics Link

If you selected to display a report as a widget on the Alma homepage, see **Displaying a Widget** on page **276** of the *Alma Administration Guide* for information on how to display the widget.

4

Scheduling

You can schedule Alma reports and dashboards to be run at specific set times, such as daily or weekly, and subscribe to them so that they are sent to your email address. Before you can schedule a reports or dashboards, you must create and save them in Alma Analytics. For more information, see **Creating a New Report** on page **20**.

NOTES:

- Do not use the scheduling icon (OBI Agents) in the Analytics interface to schedule reports. Scheduling reports using this icon does not work. Reports can be scheduled from Alma only as described below (using **Administration > Analytics > Configuration Menu > Analytics Objects List**) and not using OBI Agents.
- There is a limitation that only the first tab of a dashboard is exported as part of a dashboard schedule.

VIDEO:

For a video on enhancements to analytics scheduling options, see the *Enhancements to Analytics Scheduling Options* video (3:05 mins).

To schedule a report:

1 From the Alma Main menu, click **Administration > Analytics > Configuration Menu > Analytics Objects List**. The following is displayed:

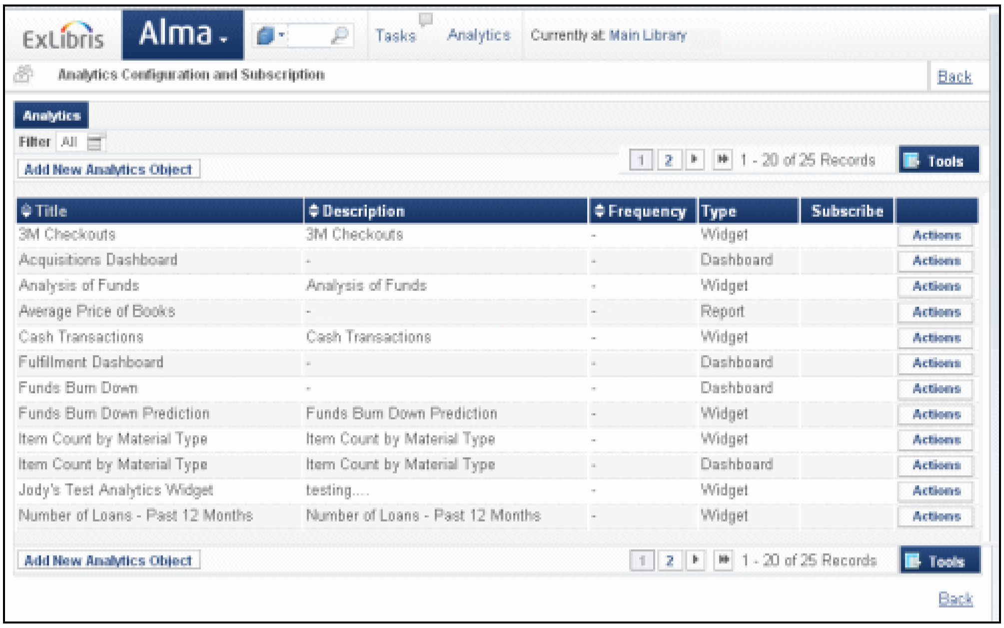


Figure 32: Analytics Objects List

2 Click **Add New Analytics Object**. The following is displayed:

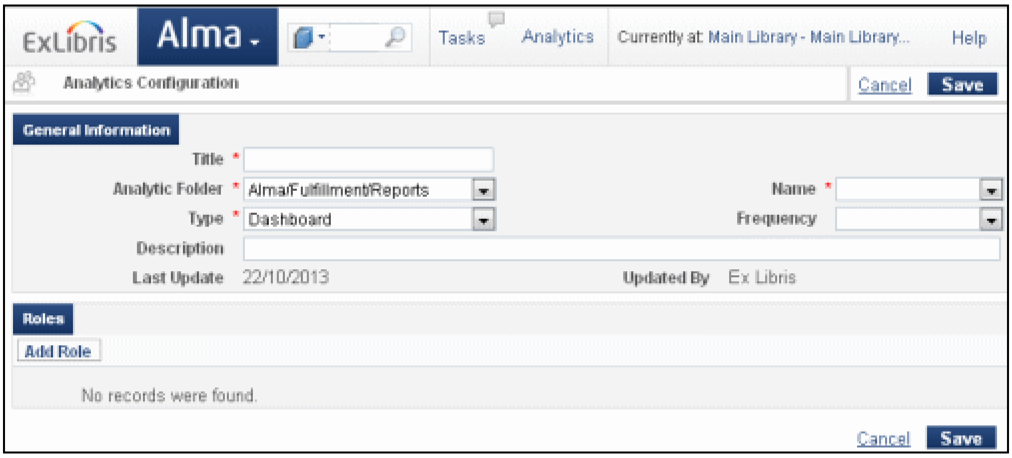


Figure 33: Add New Analytics Object

3 Fill in the following fields:

- **Title** – the title of the scheduled report or dashboard

- **Analytic Folder** – the folder in which the report or dashboard that you want to schedule is located.
- **Name** – select the name of the report or dashboard. The list of names comes from the folder you selected.
- **Type** – select one of the following from the drop-down list:
  - **Scheduled Dashboard** – to schedule a dashboard
  - **Scheduled Report** – to schedule a report. If you select **Scheduled Report**, the **Format** drop-down list is displayed with the following available formats: **PDF**, **Excel** (version 2003 – .xls format only), and **Text**.
- **Frequency** – select the frequency from the drop-down list that you want the report or dashboard to be run.

NOTE:

Generally, daily reports run every day at 3:00 AM in your data center, weekly reports every Monday at 3:00 AM in your data center, and monthly reports every second day of the month at 3:00 AM in your data center. To see exactly when reports are run, select **Resource Management > Processes > Monitor Processes > Scheduled tab**. These times cannot be changed by customers. Note that on the Monitor Jobs page, (**Administration > Manage Jobs > Monitor Jobs**) the time under the Schedule column is the local time of the library at which the job runs, which may be different than the time at the data center if they are located in different time zones.

- **Description** – Enter a description of the scheduled report or dashboard.

4. Click **Add Role**.
5. Select the roles that you want to have the ability to subscribe to the report or dashboard.
6. Click **Add Role**.
7. Click **Save**.

The report or dashboard is displayed in the Analytics Objects List.

To subscribe an Alma user to a report or dashboard:

There are two ways to subscribe an Alma user to a report or dashboard. One can be done only by administrators, the other by all users.

- To subscribe to a scheduled report or dashboard as an administrator:

  From the Analytics Configuration and Subscription page, click the gray check mark in the Subscribe column for the scheduled report or dashboard to which you want to subscribe. The check mark changes to yellow.

  You are subscribed to the report or dashboard.

- To subscribe to a scheduled report or dashboard as a regular user:

  From the Alma Main Menu, select **Administration > Analytics > Subscribe to Analytics** and click the gray check mark next to the report or dashboard to which you want to subscribe. The check mark changes to yellow.

  You are subscribed to the report or dashboard.

The following is an example of a scheduled report email. The title of the email is the same as the title of the report:

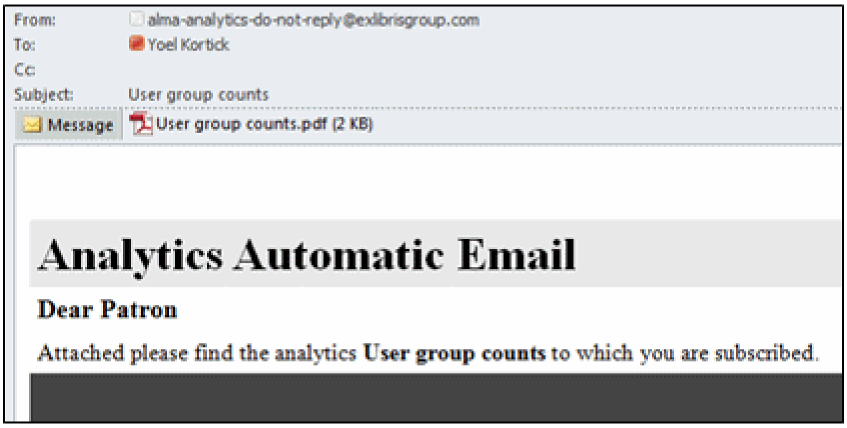


Figure 34: Example Email

To subscribe a non-Alma user to a scheduled report or dashboard:

1. From the Analytics Configuration and Subscription page, select **Actions > Mange Subscription** for a scheduled report or dashboard.
2. Click **Add Row**. The following is displayed:

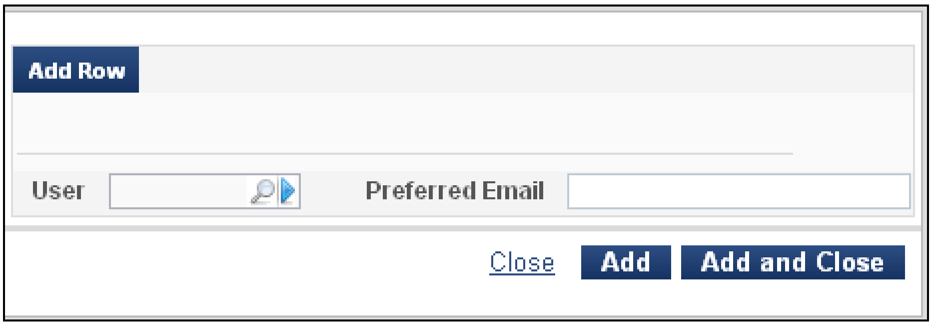


Figure 35: Subscribe Non-Alma User

3 Enter an email address for the non-Alma user.

The non-Alma user is subscribed to the scheduled report or dashboard.

5

Common Alma Analytics Procedures

This section describes common Alma Analytics procedures.

Controlling the Number of Decimal Places to which a Sum is Displayed in an Analytics Report

You can determine the number of decimal placed to which a sum is displayed in an Alma analytics report. This section presents an example of how to do this.

To determine the number of decimal placed to which a sum is displayed:

1. From the Alma Analytics dashboard, select **New > Analysis** and then select **Select Subject Area > Fine and Fees Transactions**.
2. Select the following columns:
   - Fine and Fee Status
   - Fine Fee Transaction Modification Date
   - Original Amount
3. From the User Details subject area select the following:
   - User Name
   - First Name
   - Last Name
4. Click the **Results** tab. In this following example, the sums are displayed are rounded up to whole numbers. For example, `29` has been rounded up from `28.5`:

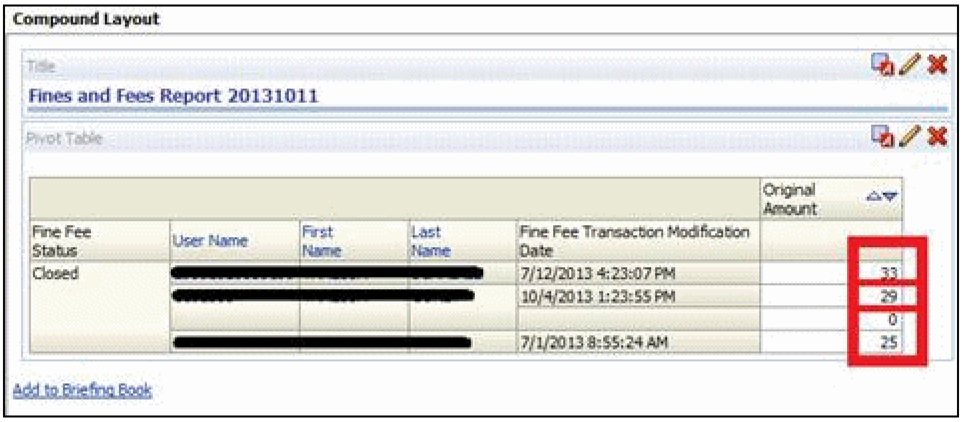


Figure 36: Sums Rounded Up

5 Click the **Criteria** tab to view the columns of the report.

6 From the column that contains the sum (in our example the Original amount column) click the More Options icon and select **Column Properties** from the drop-down list.

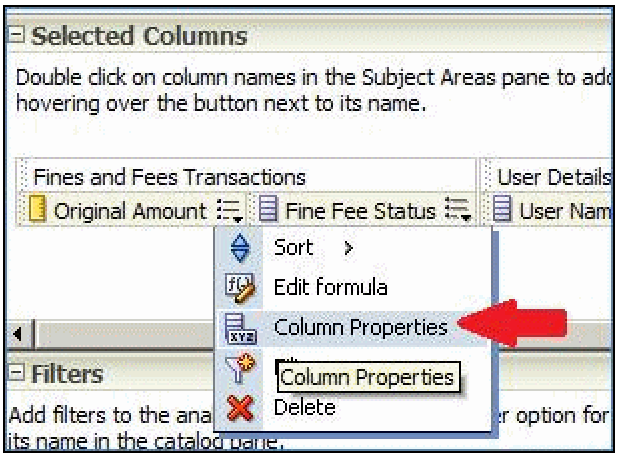


Figure 37: Column Properties Option

The Column Properties dialog box is displayed:

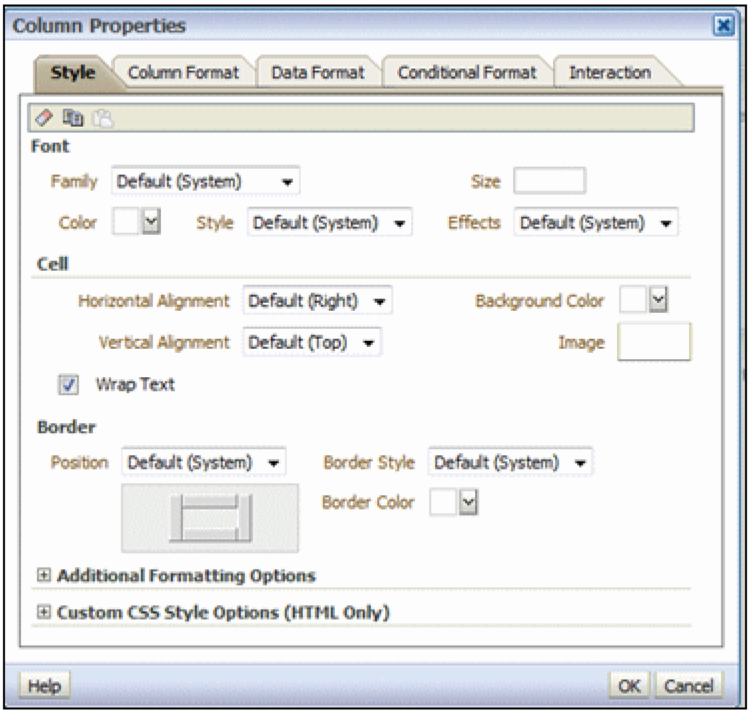


Figure 38: Column Properties Dialog Box

7 Click the **Data Format** tab. Note that Decimal Places is set to `0`.

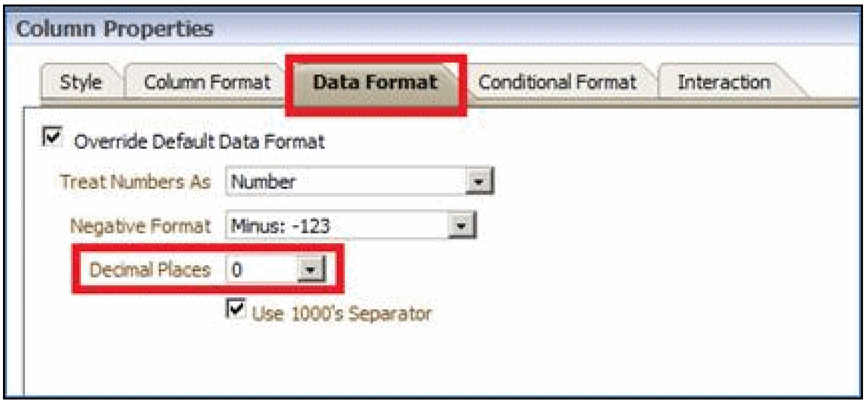


Figure 39: Data Format Tab

8 From the **Decimal Places** drop-down list, select `2`:

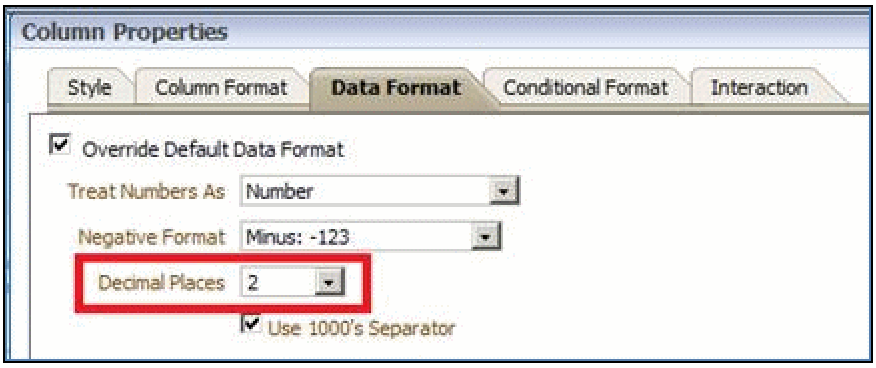


Figure 40: Decimal Places

9 Save the report and click the **Results** tab. The sums are displayed to two decimal places and the report displays `28.50` instead of `29`:

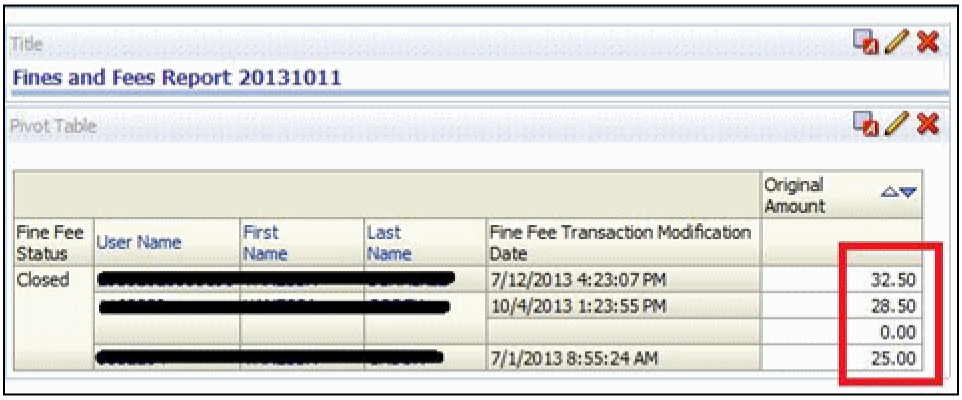


Figure 41: Sums Not Rounded Up

Adding Subtotals to a Report

This section describes how to add a subtotal to your report and the impact of the order of the columns on your subtotals.

To create an analytics report with a subtotal:

1 From Alma analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.

2 Create a report with the following columns:

- Location > Library Code
- Location > Location Code
- Loan Date > Year Key

- Loan Date > Full Month Desc
- Loan > Loans (a measurement)

3 Click the **Results** tab to display the report. For example:

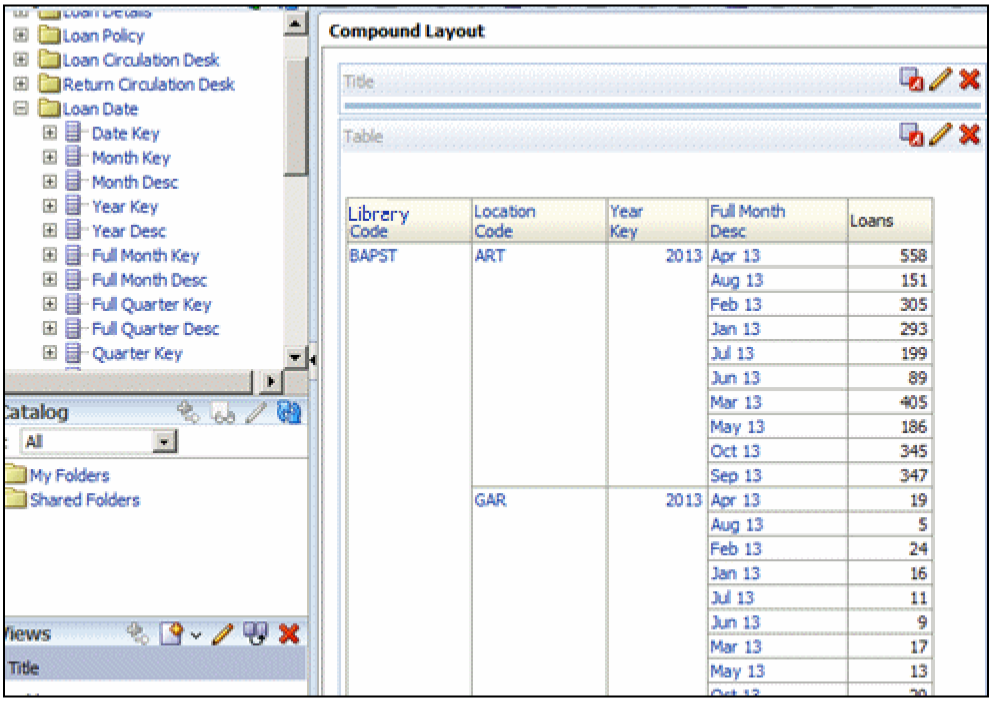


Figure 42: Year Key and Full Month Desc Columns

4 Calculate a subtotal of each library for the entire range. (This is relevant because the loans per month are displayed.)

a Click the Edit icon to display Edit view.

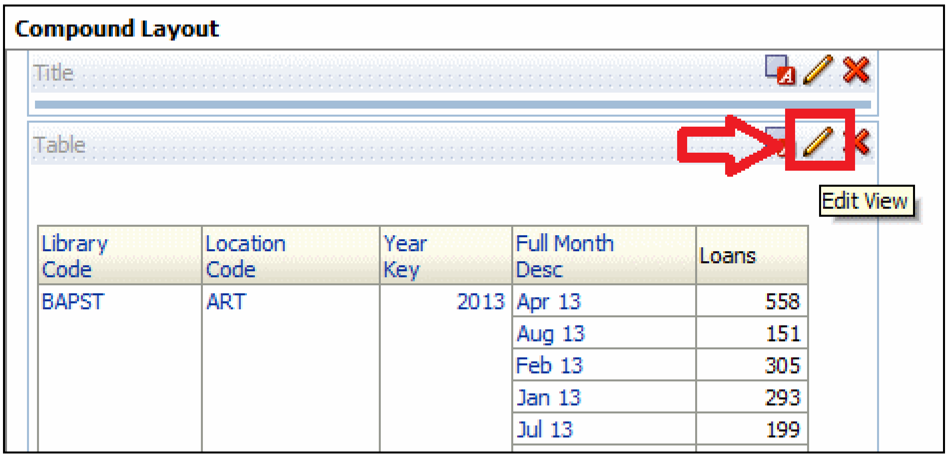


Figure 43: Edit View

b For the column that you want to calculate a subtotal, click the Sigma icon and then click **After**. In the following example, this is performed in the Location > Location Code column:

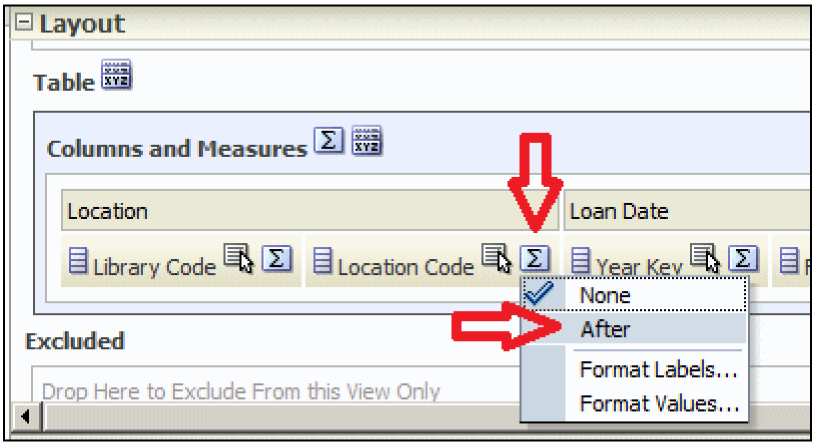
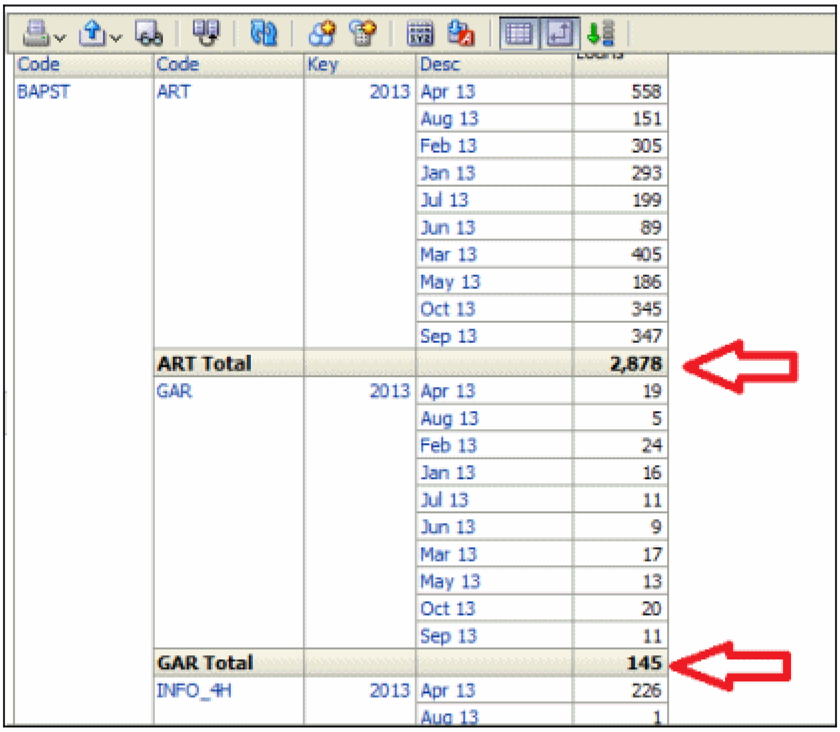


Figure 44: After Option

The subtotals are now displayed:



Code	Code	Key	Desc	
BAPST	ART	2013	Apr 13	558
			Aug 13	151
			Feb 13	305
			Jan 13	293
			Jul 13	199
			Jun 13	89
			Mar 13	405
			May 13	186
			Oct 13	345
			Sep 13	347
	ART Total			**2,878**
	GAR	2013	Apr 13	19
			Aug 13	5
			Feb 13	24
			Jan 13	16
			Jul 13	11
			Jun 13	9
			Mar 13	17
			May 13	13
			Oct 13	20
			Sep 13	11
	GAR Total			**145**
	INFO_4H	2013	Apr 13	226
			Aug 13	1

Figure 45: Subtotals

Creating an Alma Analytics Report that Displays Exact Monetary Values with a Currency Symbol

To create this analytics report:

1. From Alma Analytics, select **New > Analysis** and then select **Select Subject Area > Funds Expenditur**e.
2. Create a report with the following columns:
   - Library Name
   - Vendor Name
   - Transaction Amount
3. Click the More Options icon for Transaction Amount and select **Column Properties** from the drop-down list.

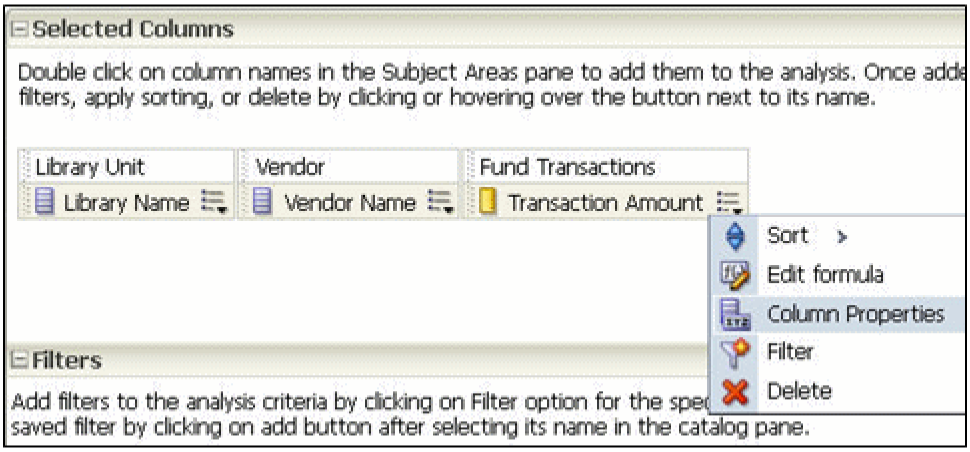


Figure 46: Column Properties

The following is displayed:

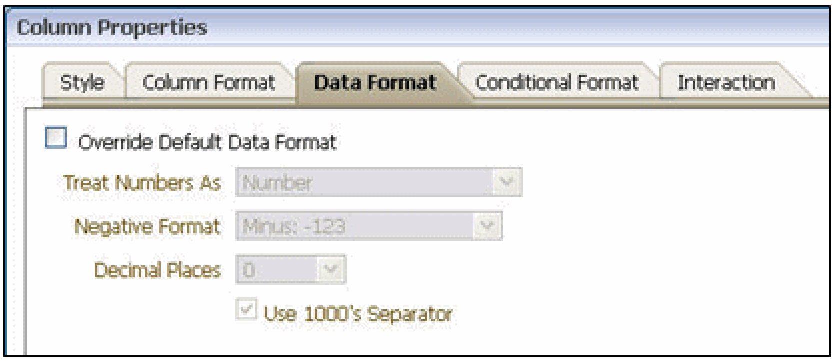


Figure 47: Data Format

4 Click the **Data Format** tab.

5 Select the **Override Default Data Format** checkbox.

6 From the **Treat Number As** drop-down list, select **Currency**. The Currency Symbol drop-down list is displayed.

7 From the **Currency Symbol** drop-down list, select a currency symbol.

8 From the **Decimal Places** drop-down list, select the number of decimal places to which you want the results displayed.

9 Select the **Use 1000's Separator** checkbox to display the 1000's separator in the results.

10 Click **OK**.

11 Save the analysis.

12 Click the **Results** tab to display the report with a currency symbol displayed in the Transaction Amount column, for example:

Library Name	Vendor Name	Transaction Amount
Biology Library (BIO)	The Bookhouse, Inc.	£74.99
Graduate Library (GRAD)	Baker & Taylor	£75.35
	Book Sense	£97.78
	Coutts Information Services	£80.50
	EBSCO Electronic	£14.95
	Haworth Press, Inc.	£125.00
	HighWire Press	£19.44
	Mostly Monographs, Inc.	£49.99
	SwetsWise (Swets Information Services)	£43.22
	Templar Books	£29.88
	The Bookhouse, Inc.	£71.25
	Yankee Book Peddler	£5,192.61
Main Library	AAAS	£2,032.50
	ARTstor, Inc.	£52.00
	Antonio's Casa de Libri	£44.45
	B&TG	£28.00
	BAKER & TAYLORA	£174.92

Figure 48: Report

Creating an Alma Analytics Report That Performs Mathematical Formula on Two Columns

In the following example, one column displays the number of loans and a second column displays the number of loan days. A third column is created that displays the number of loan days divided by the number of loans. This may be useful for seeing high and low usage of items in order to decide where new items need to be purchased and where items can be withdrawn.

To create this analytics report:

1 From Alma Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.

2 Create a report with the following columns:

- Library Name
- Loans
- Loan Days
- Date Key

The criteria for the report appear as follows:

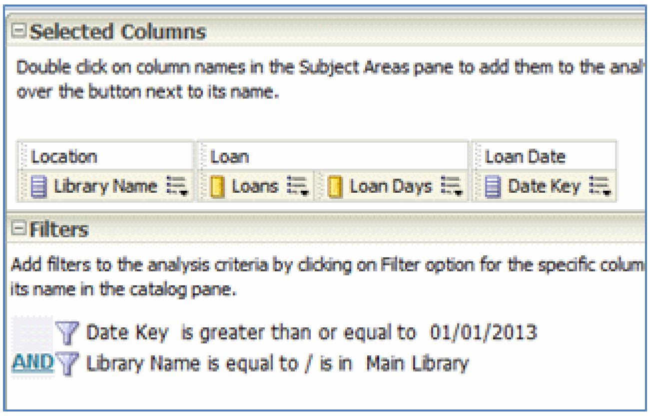


Figure 49: Selected Columns

3 Click the **Results** tab. The following is an example of the results:

Library Name	Loans	Loan Days	Date Key
Main Library	23	95	1/2/2013
	36	239	1/3/2013
	37	255	1/4/2013
	24	173	1/5/2013
	8	23	1/6/2013
	31	383	1/7/2013
	32	328	1/8/2013
	46	481	1/9/2013
	20	146	1/10/2013
	45	233	1/11/2013
	41	178	1/13/2013
	104	722	1/14/2013
	94	582	1/15/2013
	94	447	1/16/2013
	106	769	1/17/2013
	65	360	1/18/2013

Figure 50: Report

4 Click the **Criteria** tab and add a new column of any kind.

5 Click the More Options icon of the new column and select **Edit Formula**. The Column Formula dialog box is displayed:

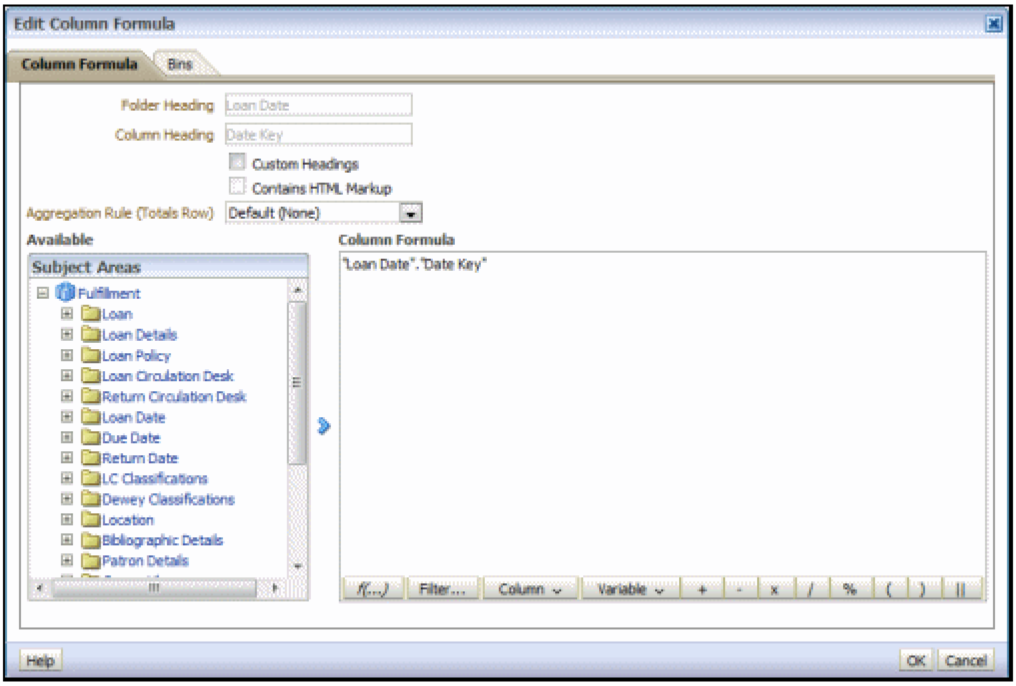


Figure 51: Column Formula

6 Delete the existing formula.

7 Enter `"Loan"."LoanDays"/"Loan"."Loans"`

8 Click the More Options icon of the new column and select **Column Properties > Column Format** and enter a new name for the column in the Column Heading field.

9 Click the More Options icon of the new column and select **Column Properties**. The column Properties dialog box is displayed:

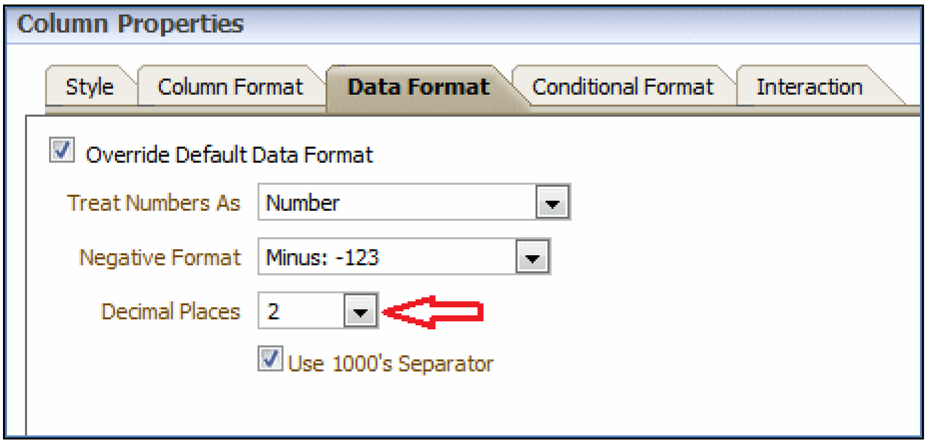
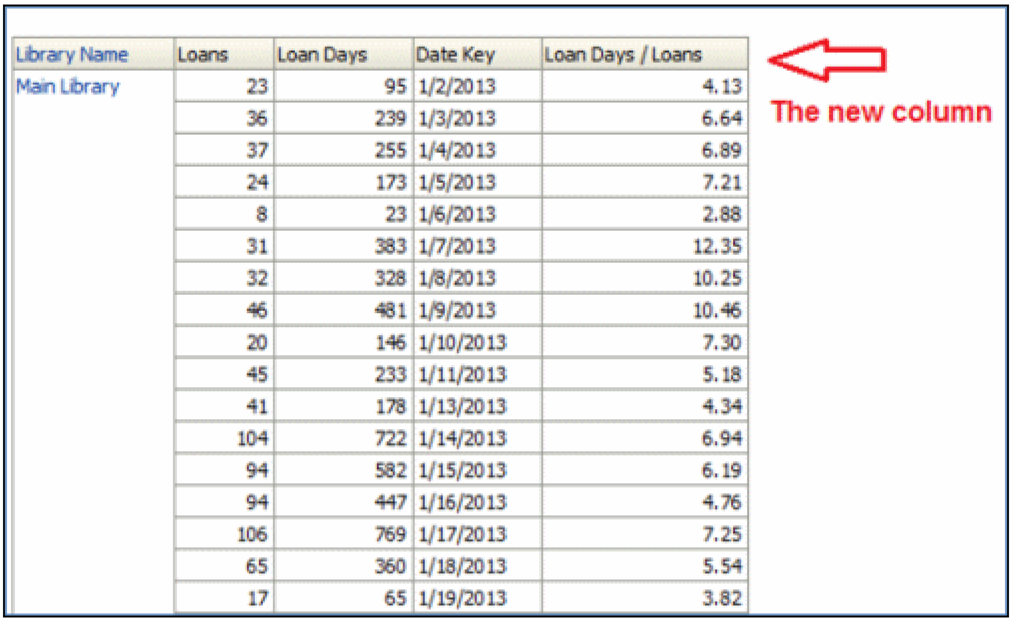


Figure 52: Column Properties

10 From the Data Format tab, select a number of decimal places from the drop-down list.

The following is an example of the results:



Library Name	Loans	Loan Days	Date Key	Loan Days / Loans
Main Library	23	95	1/2/2013	4.13
	36	239	1/3/2013	6.64
	37	255	1/4/2013	6.89
	24	173	1/5/2013	7.21
	8	23	1/6/2013	2.88
	31	383	1/7/2013	12.35
	32	328	1/8/2013	10.25
	46	481	1/9/2013	10.46
	20	146	1/10/2013	7.30
	45	233	1/11/2013	5.18
	41	178	1/13/2013	4.34
	104	722	1/14/2013	6.94
	94	582	1/15/2013	6.19
	94	447	1/16/2013	4.76
	106	769	1/17/2013	7.25
	65	360	1/18/2013	5.54
	17	65	1/19/2013	3.82

The new column

Figure 53: Analytics Report

In the following example, the number of days between the date an order is sent to a vendor and the date the item is received. This may be useful for seeing which vendors are the fastest to respond and which vendors are the slowest to respond.

To create this analytics report:

1 From Alma Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.

2 Create a report with the following columns:

- PO Line > Send Date
- Physical Item Details > Receiving Date
- Bibliographic Details > Title
- PO Line > Vendor Account Description

The criteria for the report appear as follows:

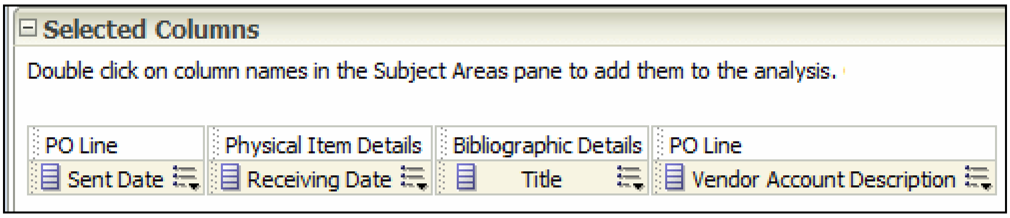
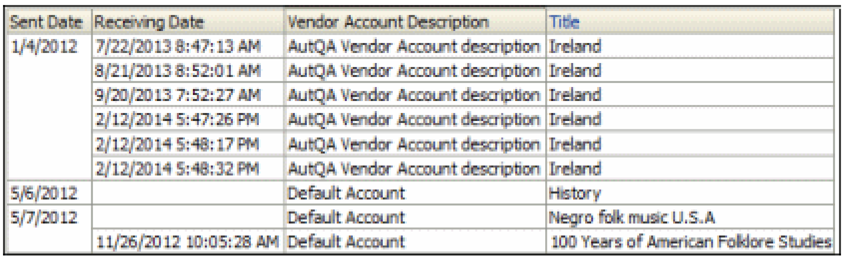


Figure 54: Selected Columns

3 Click the **Results** tab. The following is an example of the results:



Sent Date	Receiving Date	Vendor Account Description	Title
1/4/2012	7/22/2013 8:47:13 AM	AutQA Vendor Account description	Ireland
	8/21/2013 8:52:01 AM	AutQA Vendor Account description	Ireland
	9/20/2013 7:52:27 AM	AutQA Vendor Account description	Ireland
	2/12/2014 5:47:26 PM	AutQA Vendor Account description	Ireland
	2/12/2014 5:48:17 PM	AutQA Vendor Account description	Ireland
	2/12/2014 5:48:32 PM	AutQA Vendor Account description	Ireland
5/6/2012		Default Account	History
5/7/2012		Default Account	Negro folk music U.S.A
	11/26/2012 10:05:28 AM	Default Account	100 Years of American Folklore Studies

Figure 55: Report

4 Click the **Criteria** tab and add a new column of any kind.

5 Click the More Options icon of the new column and select **Edit Formula**. The Column Formula dialog box is displayed:

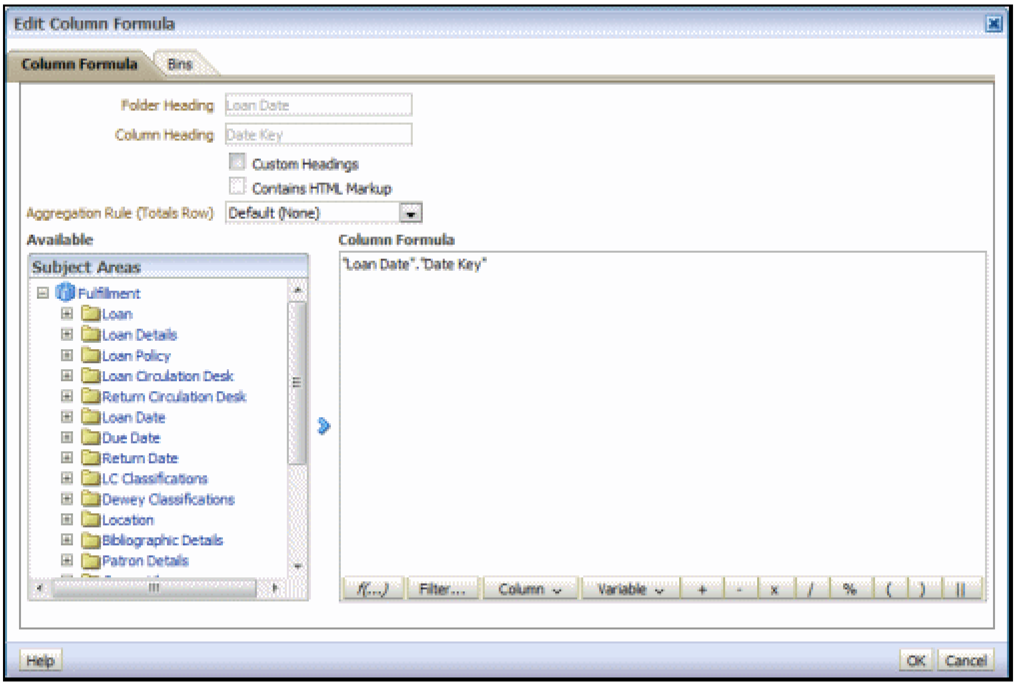


Figure 56: Column Formula

6 Delete the existing formula.

7 Enter `TIMESTAMPDIFF(SQL_TSI_DAY,"PO Line"."Send Date","Physical Item Details"."Receiving Date")`

The following are the elements of the formula:

- TIMESTAMPFIFF – display the difference of two dates
- SQL_TSI_DAY – display the unit in days
- The first value (`PO Line.Send Date`) – the date from which you want to subtract
- The second value (`Physical Item Details.Receiving Date`) – the date to subtract.

8 Click the More Options icon  of the new column and select **Column Properties > Column Format** and enter a new name for the column in the Column Heading field.

The following is an example of the results:

Sent Date	Receiving Date	Vendor Account Description	Title	Days to Arrive
1/4/2012	7/22/2013 8:47:13 AM	AutQA Vendor Account description	Ireland	565
	8/21/2013 8:52:01 AM	AutQA Vendor Account description	Ireland	595
	9/20/2013 7:52:27 AM	AutQA Vendor Account description	Ireland	625
	2/12/2014 5:47:26 PM	AutQA Vendor Account description	Ireland	770
	2/12/2014 5:48:17 PM	AutQA Vendor Account description	Ireland	770
	2/12/2014 5:48:32 PM	AutQA Vendor Account description	Ireland	770
5/6/2012		Default Account	History	
5/7/2012		Default Account	Negro folk music U.S.A	
	11/26/2012 10:05:28 AM	Default Account	100 Years of American Folklore Studies	203

Figure 57: Report

The Days to Arrive column displays the number of days from when the item was ordered until it was received.

Displaying Values on the Top of Each Bar of an Alma Analytics Bar Graph

This section describes how to display values on the top of each bar of an Alma analytics bar graph.

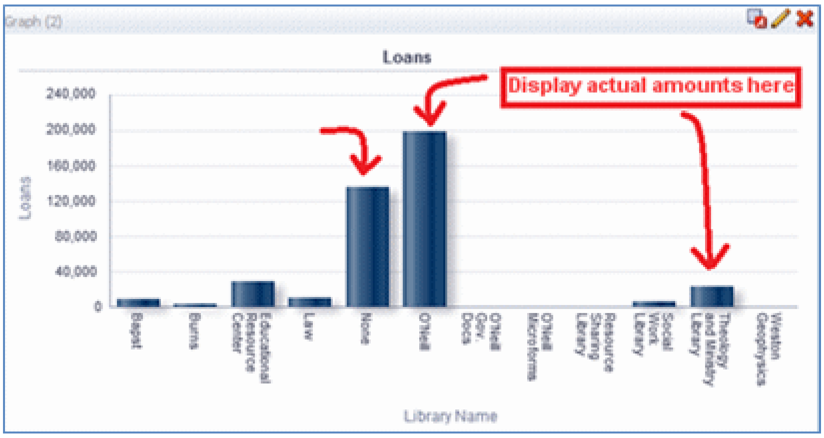


Figure 58: Display Values on Top of Each Bar

To display values on the top of each bar of an Alma analytics bar graph:

1. From Alma Analytics, select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
2. Create a report with the following columns, for example:
   - Loan > Loans
   - Location > Library Name
3. Click the My View icon and then select **Graph > Bar > Default (Vertical)**.

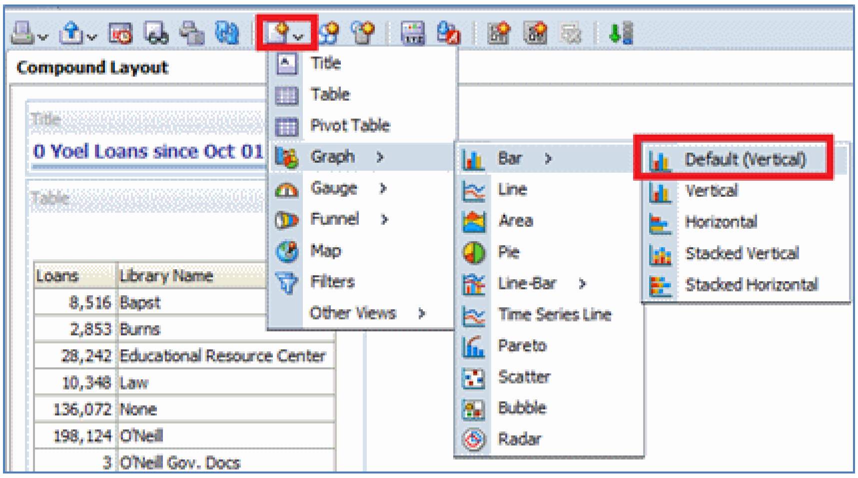


Figure 59: Default Bar Graph

4 From the Results tab, click the Edit icon to edit the graph:

Figure 60: Pencil Icon

5 Click the Edit Graph Properties icon :

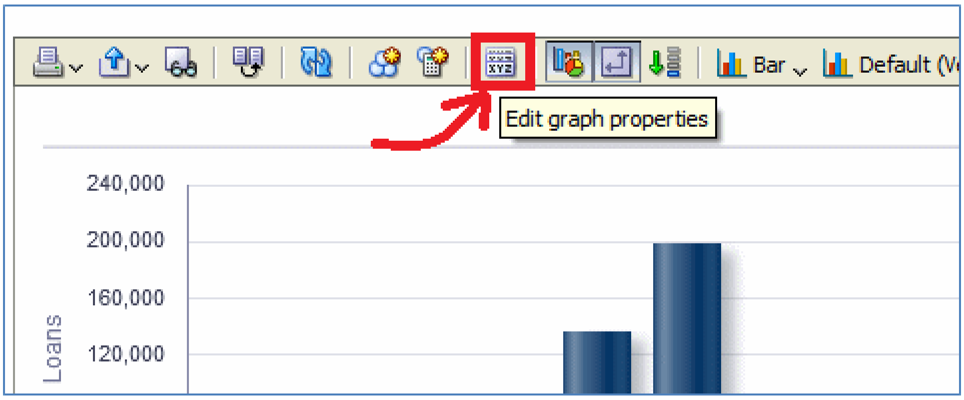


Figure 61: Edit Graph Properties

6 From the Titles and Labels tab, click **Data Labels**:

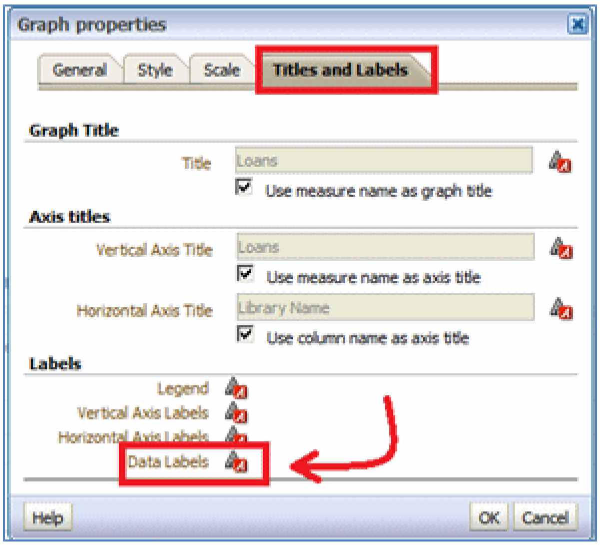


Figure 62: Titles and Labels

7 From the Display Options tab, select **Always**:

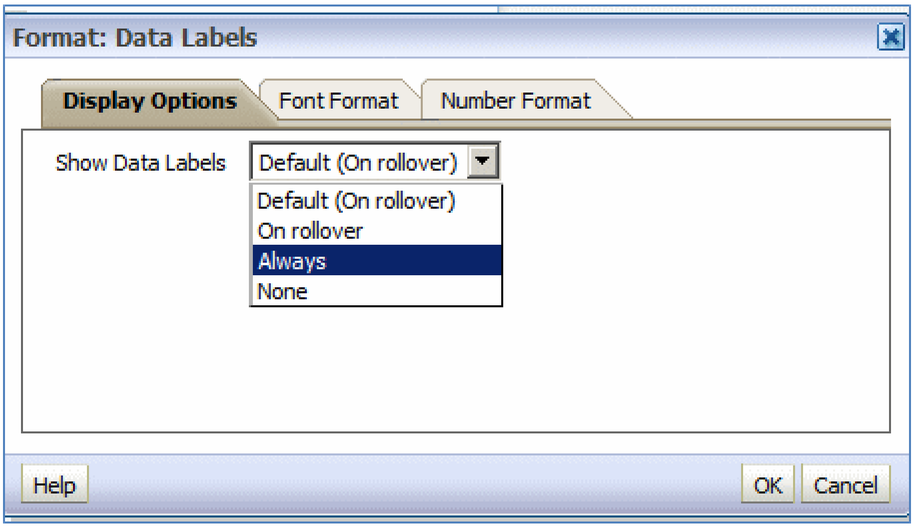


Figure 63: Display Options

Values are now displayed on the top of each bar of the bar graph:

Figure 64: Values on Top of Each Bar

Concatenating Two or More Fields in an Alma Analytics Report

You may want to put two fields together and have text between them. For example, you now have library code and item ID in two separate columns and you want to have library code, space, dash, space, and then item ID in one column. This section describes one way of doing this.

To concatenating two or more fields in an Alma analytics report:

1. From the Alma Main Menu, select **Administration** > **Analytics** > **Design Analytics** to open Alma Analytics.
2. Select **New** > **Analysis** and then select **Select Subject Area** > **Fulfillment**.

3 Create a report with the following columns, for example:

- Loan Details > Item ID
- Loan Details > Barcode
- Location > Library Code

4 From the Physical Items Subject Area, add Creation Date > Date Key

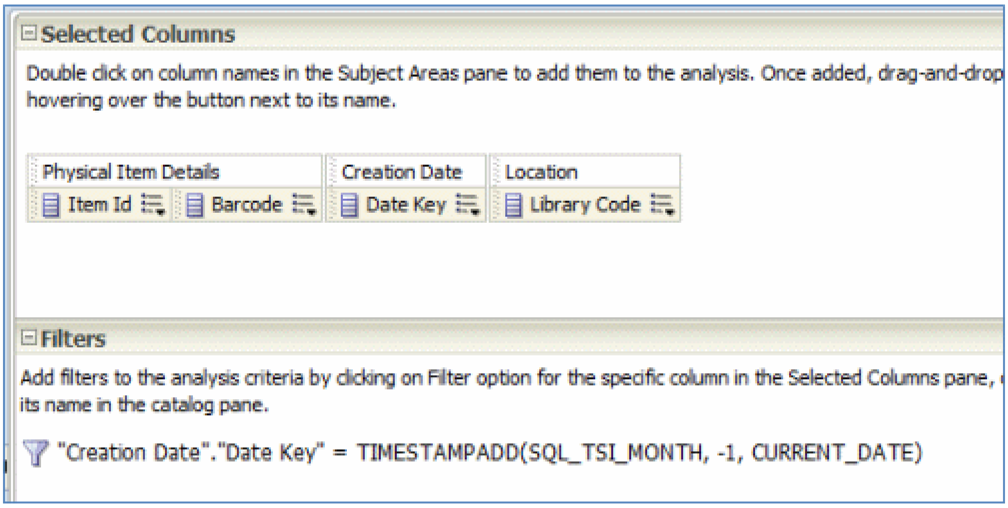
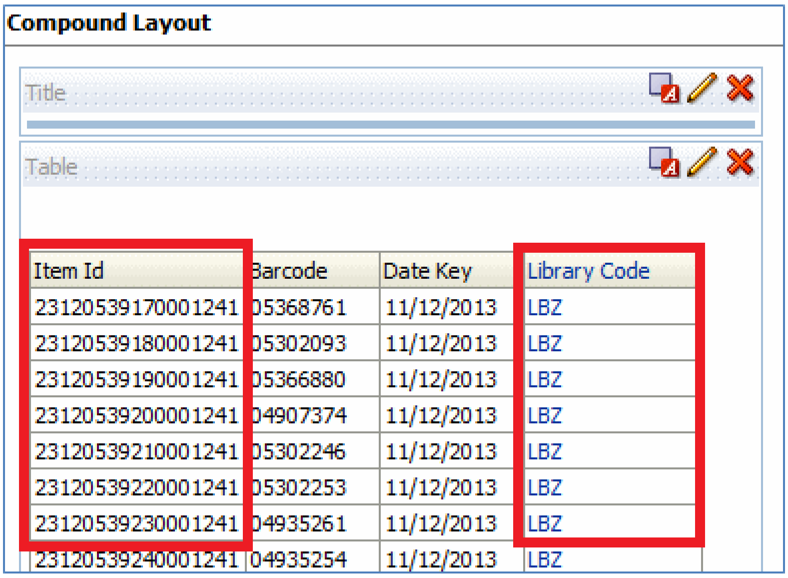


Figure 65: Selected Columns

5 Click the **Results** tab and verify that the results have the columns that you want to concatenate:



Item Id	Barcode	Date Key	Library Code
23120539170001241	05368761	11/12/2013	LBZ
23120539180001241	05302093	11/12/2013	LBZ
23120539190001241	05366880	11/12/2013	LBZ
23120539200001241	04907374	11/12/2013	LBZ
23120539210001241	05302246	11/12/2013	LBZ
23120539220001241	05302253	11/12/2013	LBZ
23120539230001241	04935261	11/12/2013	LBZ
23120539240001241	04935254	11/12/2013	LBZ

Figure 66: Compound Layout

6 In the Criteria tab of each column that you want to concatenate, click the More Options icon and then select **Edit Formula**:

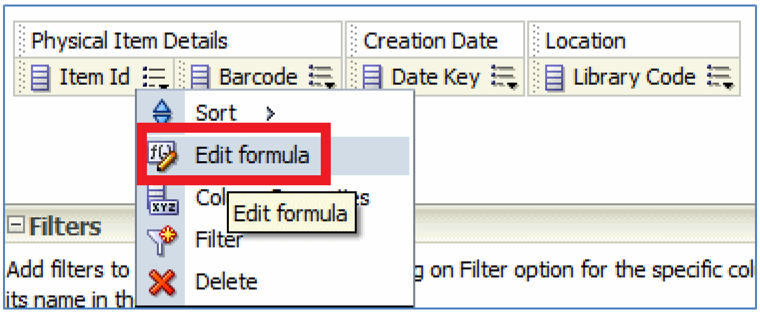


Figure 67: Edit Formula

The formula of the column is displayed:

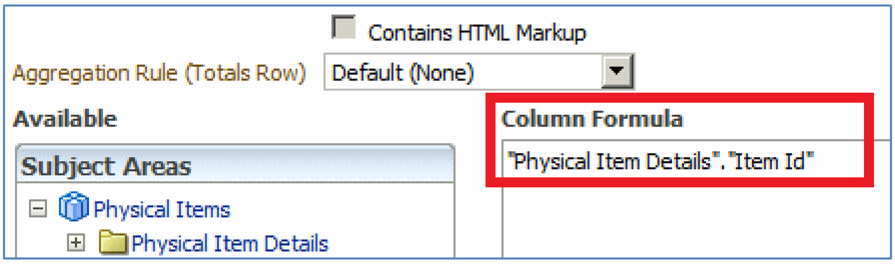


Figure 68: Column Formula

Note that the Item ID is `"Physical Item Details"."Item Id"` and that the Library Code is `"Location"."Library Code"`.

7 Click the More Options icon and then select **Edit Formula** for one of the fields that you want to concatenate:

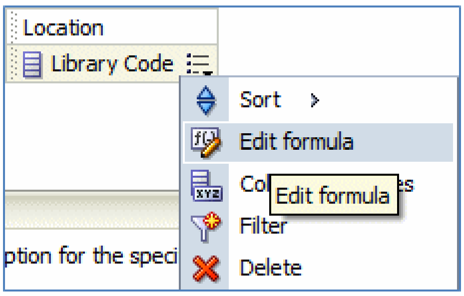


Figure 69: Edit Formula

After the existing field, add a pipe and then the field (or fields) that you want to appear. For example:

```
"Location"."Library Code"||"Physical Item Details"."Item Id"
```

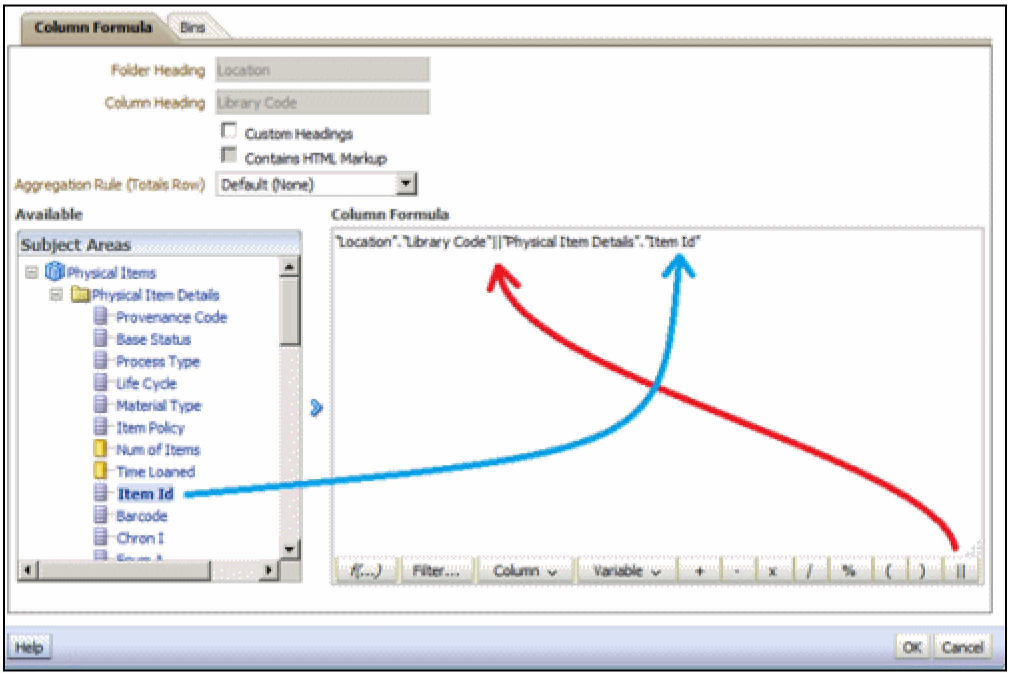
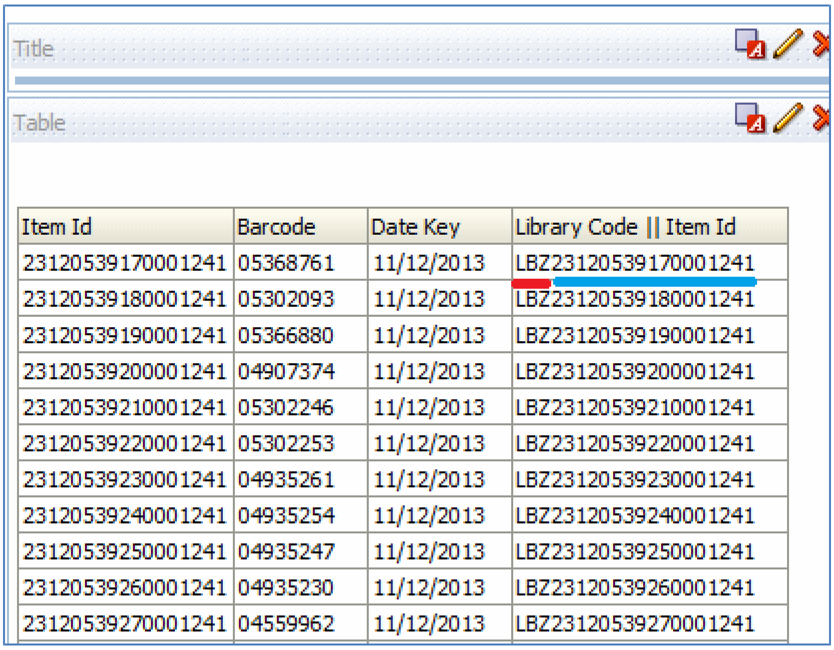


Figure 70: Column Formula

8 Click the **Results** tab. The column now contains both the library code and the item ID:



Item Id	Barcode	Date Key	Library Code || Item Id
2312053917000 1241	05368761	11/12/2013	LBZ23120539170001241
23120539180001241	05302093	11/12/2013	LBZ23120539180001241
23120539190001241	05366880	11/12/2013	LBZ23120539190001241
23120539200001241	04907374	11/12/2013	LBZ23120539200001241
23120539210001241	05302246	11/12/2013	LBZ23120539210001241
23120539220001241	05302253	11/12/2013	LBZ23120539220001241
23120539230001241	04935261	11/12/2013	LBZ23120539230001241
23120539240001241	04935254	11/12/2013	LBZ23120539240001241
23120539250001241	04935247	11/12/2013	LBZ23120539250001241
23120539260001241	04935230	11/12/2013	LBZ23120539260001241
23120539270001241	04559962	11/12/2013	LBZ23120539270001241

Figure 71: Library Code and Item ID

9 Click the More Options icon and then select **Edit Formula**.

10 Add a “space dash space” surrounded by single quotes and another double pipe between the Library Code and the Item ID.

Change the following:

```
"Location"."Library Code"||"Physical Item Details"."Item Id"
```

To the following:

```
"Location"."Library Code"|| '-' ||"Physical Item
Details"."Item Id"
```

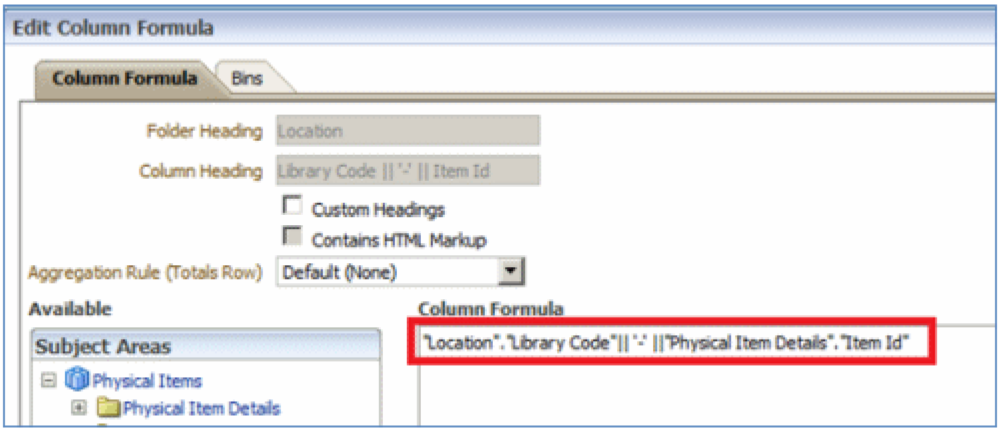


Figure 72: Edit Column Formula

11 Click the **Results** tab. The field is concatenated with a space dash space between each part:

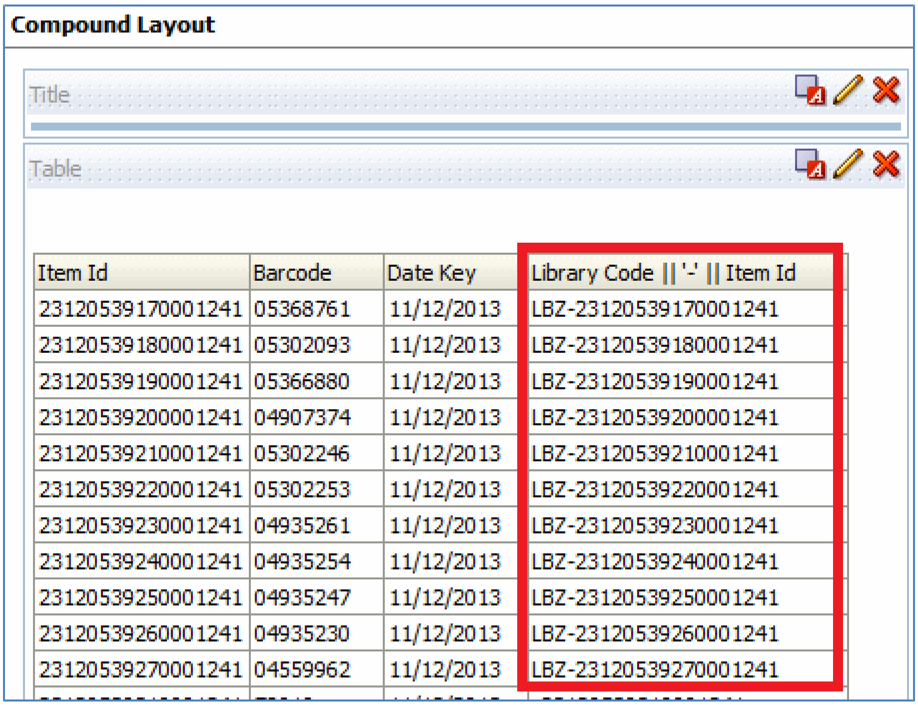


Figure 73: Compound Layout

12 Delete the non-desired field by clicking the More Options icon and selecting **Delete**.

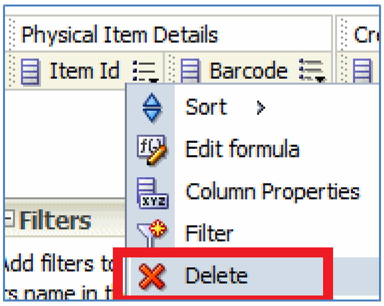


Figure 74: Delete

13 Rename the concatenated field:

a Click the More Options icon and select **Column Properties**:

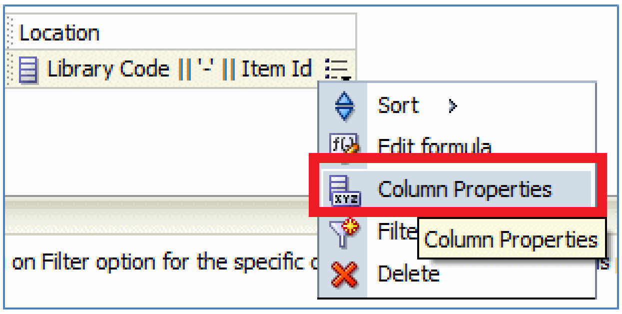


Figure 75: Column Properties

b Enter a new name in the Column Heading field.

c Select the **Custom Headings** checkbox.

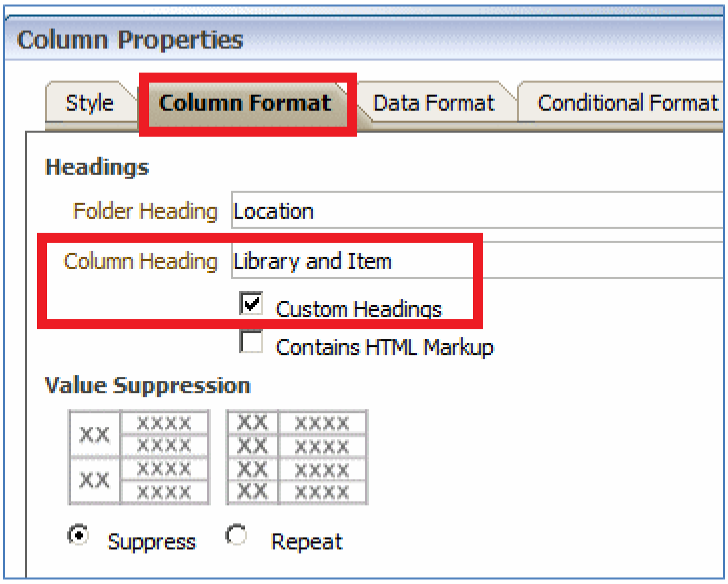
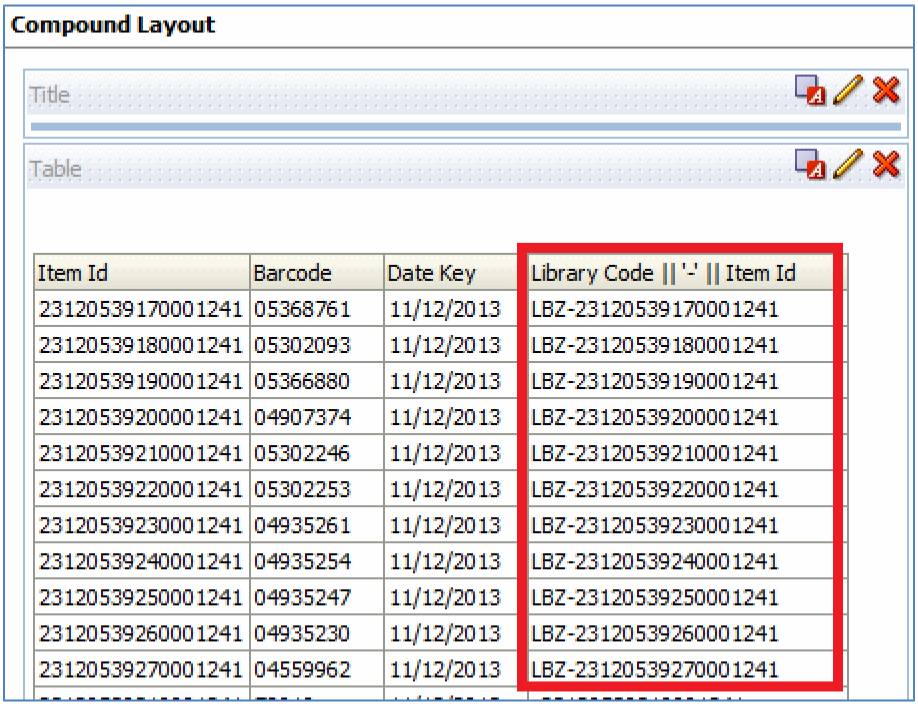


Figure 76: Column Heading

14 Click the **Results** tab to see the results:



Item Id	Barcode	Date Key	Library Code || '-' || Item Id
2312053917000 1241	05368761	11/12/2013	LBZ-23120539170001241
23120539180001241	05302093	11/12/2013	LBZ-23120539180001241
23120539190001241	05366880	11/12/2013	LBZ-23120539190001241
23120539200001241	04907374	11/12/2013	LBZ-23120539200001241
23120539210001241	05302246	11/12/2013	LBZ-23120539210001241
23120539220001241	05302253	11/12/2013	LBZ-23120539220001241
23120539230001241	04935261	11/12/2013	LBZ-23120539230001241
23120539240001241	04935254	11/12/2013	LBZ-23120539240001241
23120539250001241	04935247	11/12/2013	LBZ-23120539250001241
23120539260001241	04935230	11/12/2013	LBZ-23120539260001241
23120539270001241	04559962	11/12/2013	LBZ-23120539270001241

Figure 77: Compound Layout

Filtering by Non-Fixed Dates in an Alma Analytics Report

This section describes how to filter an Alma analytics report by a date that is non-fixed, such as "greater than 7 days ago" or "sometime this year". This is useful if you want a report of orders made in the last week or the number of items loaned in the current year. There are several ways to create such filters. This section describes one way of doing this and presents four examples.

To filter by non-fixed dates in an Alma analytics report:

1. From the Alma Main Menu, select **Administration > Analytics > Design Analytics** to open Alma Analytics.
2. Select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
3. Create a report with the following columns, for example:
   - Loan > Loans
   - Loan > Renewals
   - Loan Date > Date Key

The following examples describe several ways of filtering the results by a date that is non-fixed:

Example 1 – The Last Seven Days

The report displays any items loaned within the last seven days.

To display any items loaned within the last seven days:

1. From the Date Key field, click the More Options icon  and select **Filter**.
2. Click **Convert this filter to SQL**.

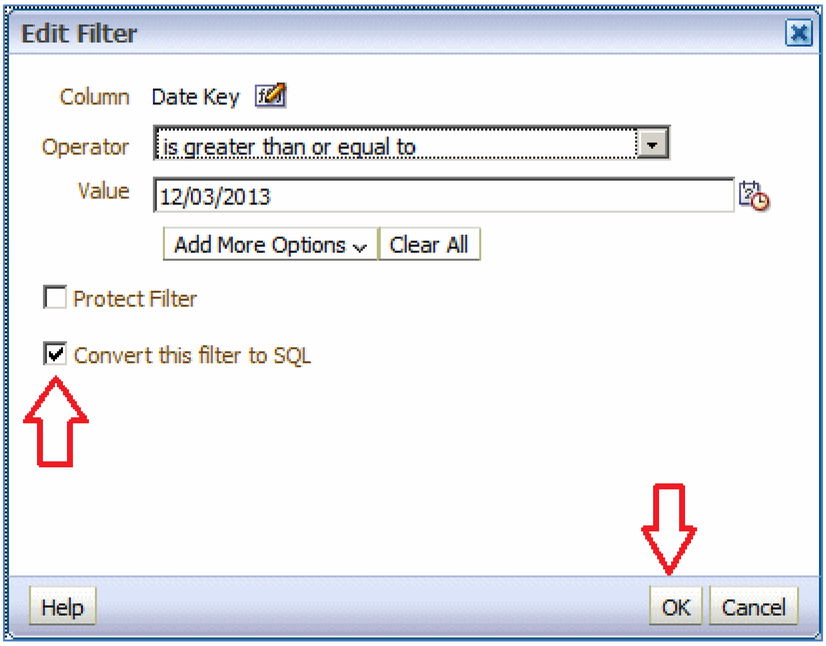


Figure 78: Edit Filter

3 Click **OK**. The following is displayed:

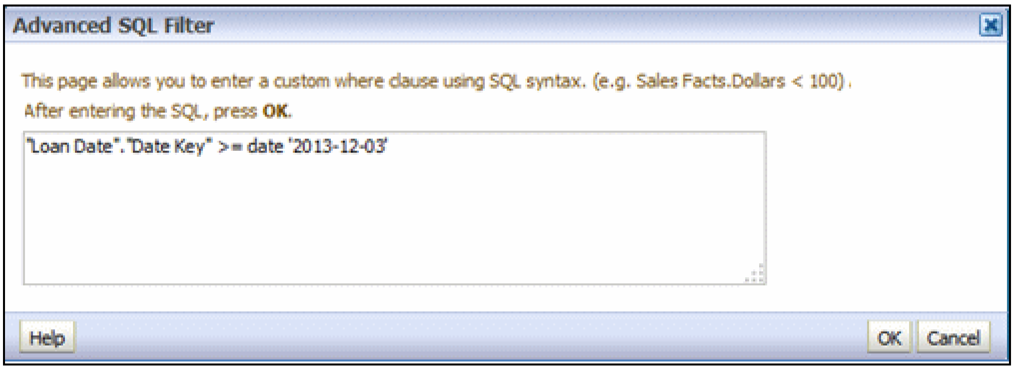


Figure 79: Advanced SQL Filter

4 Change the text from:

```
"Loan Date"."Date Key" >= date '2013-12-03'
```

To:

```
"Loan Date"."Date Key" >= TIMESTAMPADD(SQL_TSI_DAY, -7,
CURRENT_DATE)
```

The text now appears as follows:

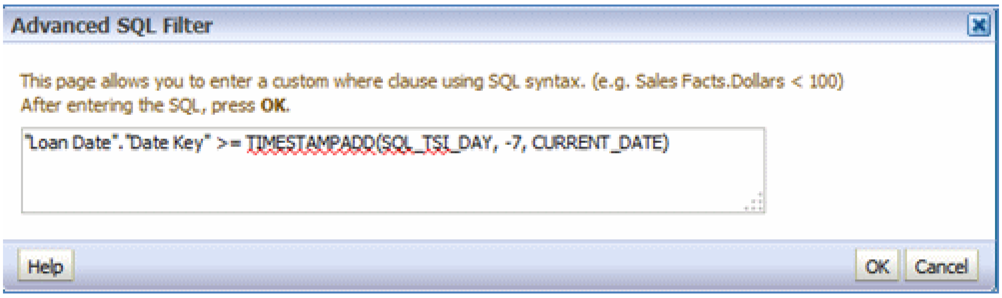


Figure 80: Advanced SQL Filter

5 Click **OK**. The filter appears as follows:

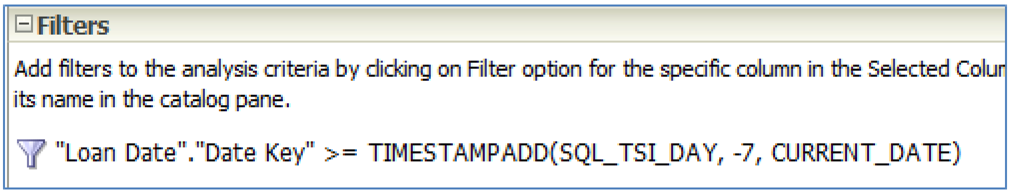


Figure 81: Filters

6 Click the **Results** tab to view the report. The report includes results from Dec. 03, 2013:

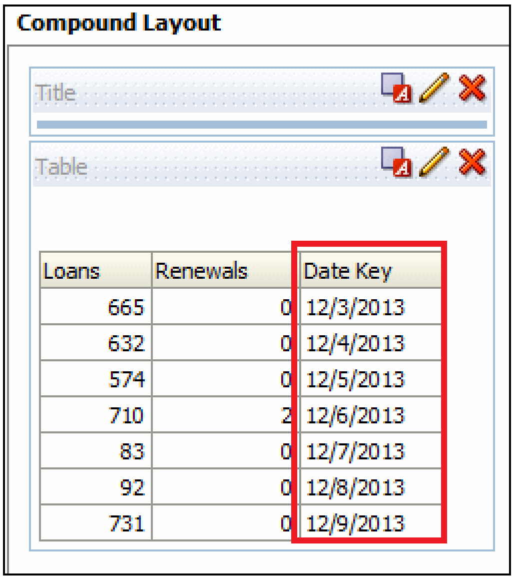


Figure 82: Compound Layout

Example 2 – The Current Month

The report displays any items loaned in the current month.

To displays any items loaned in the current month:

1 Click the Edit icon in the filter pane of example #1.

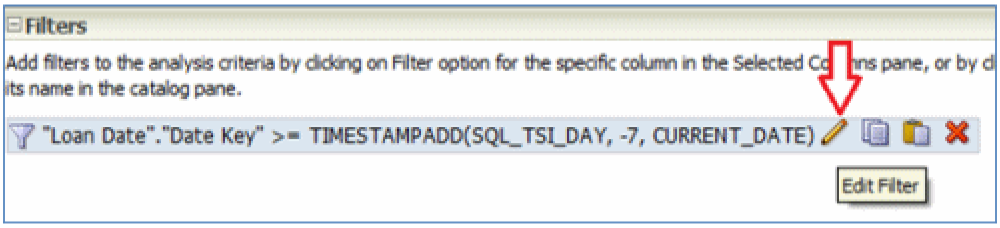


Figure 83: Edit Filter

2 Change the text to:

```
Loan Date"."Month Key" = MONTH(CURRENT_DATE)
```

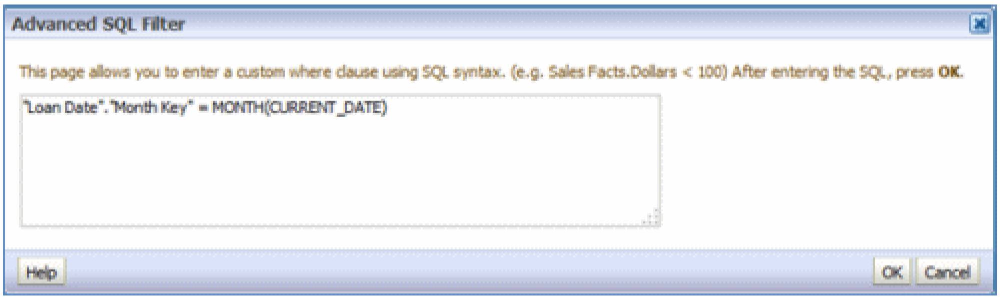


Figure 84: Advanced SQL Filter

NOTE:
The retrieval is by "Loan Date".Month Key" and not "Loan Date".Date Key".

3 This syntax includes all dates in December for every year. Add additional retrieval for the current year using the year key:

```
"Loan Date"."Year Key" = YEAR(CURRENT_DATE)
```

The filter appears as follows:

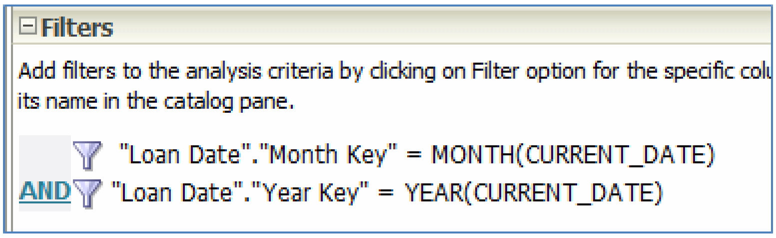
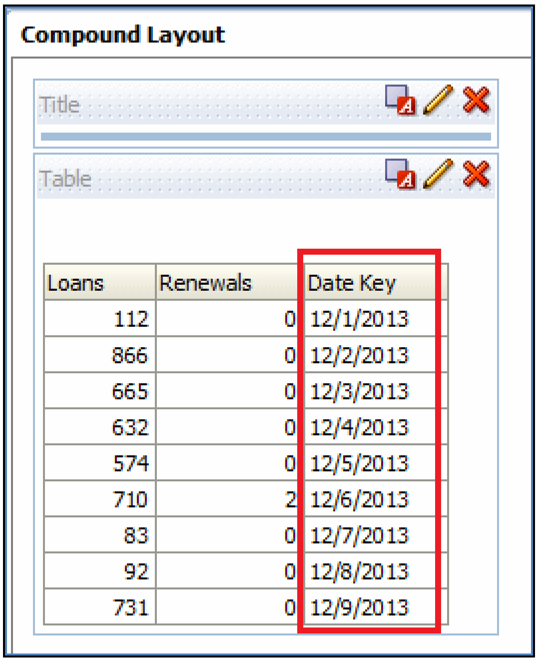


Figure 85: Filters

The report now includes results from the current month (December) and the current year (2013):



Loans	Renewals	Date Key
112	0	12/1/2013
866	0	12/2/2013
665	0	12/3/2013
632	0	12/4/2013
574	0	12/5/2013
710	2	12/6/2013
83	0	12/7/2013
92	0	12/8/2013
731	0	12/9/2013

Figure 86: Compound Layout

Example 3 – The Current Year

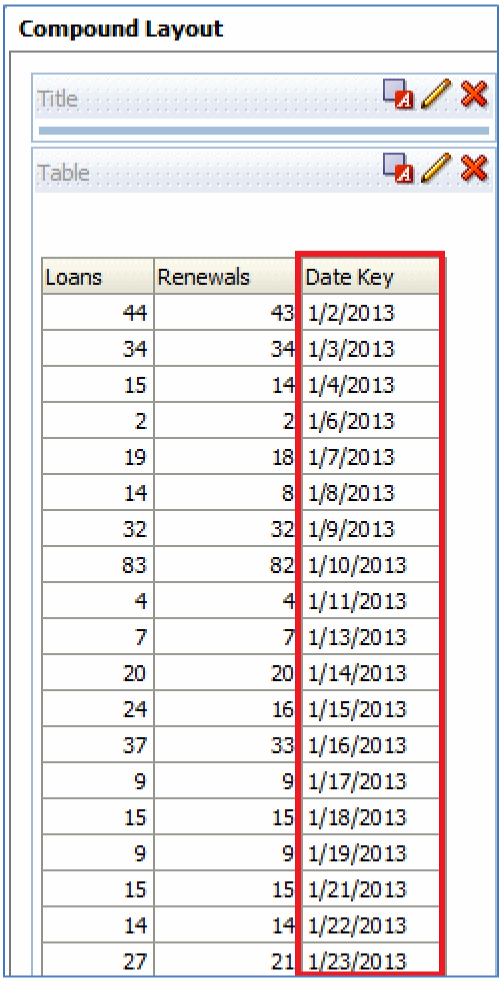
The report displays results from the current year (for example, 2013).

To display results from the current year:

1 Change the SQL filter from the previous example to the following:

```
"Loan Date"."Year Key" = YEAR(CURRENT_DATE)
```

2 Click the **Results** tab to display the report:



Example 4 – The Last Year

The report displays results from the last year (the last 365 days).

1. Change the SQL filter from the previous example to the following:

```
"Loan Date"."Date Key" >= TIMESTAMPADD(SQL_TSI_YEAR, -1,
CURRENT_DATE)
```

The filter appears as follows:

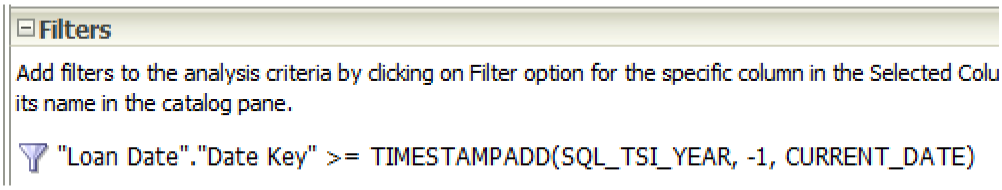
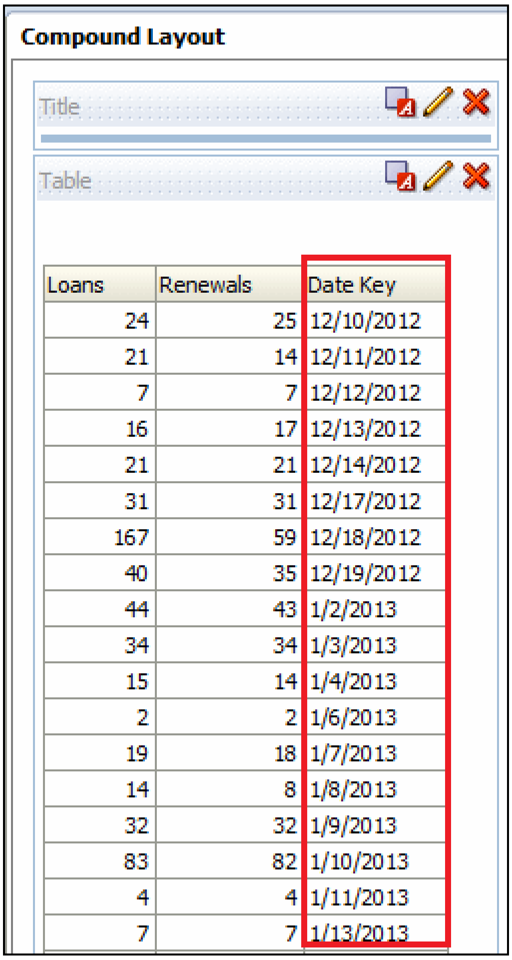


Figure 87: Filters

2 Click the **Results** tab to view the report:



Loans	Renewals	Date Key
24	25	12/10/2012
21	14	12/11/2012
7	7	12/12/2012
16	17	12/13/2012
21	21	12/14/2012
31	31	12/17/2012
167	59	12/18/2012
40	35	12/19/2012
44	43	1/2/2013
34	34	1/3/2013
15	14	1/4/2013
2	2	1/6/2013
19	18	1/7/2013
14	8	1/8/2013
32	32	1/9/2013
83	82	1/10/2013
4	4	1/11/2013
7	7	1/13/2013

Figure 88: Compound Layout

Adding Text to the Results of an Alma Analytics Report

You can configure Alma Analytics to automatically add text to the results of a report. In the following example, the characters ### are added to the results of a report.

To add text to the results of a report:

1. From the Alma Main Menu, select **Administration > Analytics > Design Analytics** to open Alma Analytics.
2. Select **New > Analysis** and then select **Select Subject Area > Fulfillment**.
3. Create a report with the following columns, for example:
   - Bibliographic Details > Title
   - Physical Item Details > Creation Date
   - Physical Item Details > Material Type
   - Loan Details > Call Number
   - Loan Details > Loan Status

   The following is an example of a report:

Title	Creation Date	Material Type	Call Number	Loan Status
"An anarchy in the mind and in the heart" : narrating Anglo-Ireland /	8/12/2013	Book	PR8803 .W65 2006	Complete
"Can we all get along?" : racial and ethnic minorities in American politics /	8/12/2013	Book	E184 .A1 M127 1995	Active
"Captains courageous"; a story of the Grand banks,	8/12/2013	Book	PR4854 .C3 1899	Active
"Chatter" : language and history in Kierkegaard /	8/12/2013	Book	B4378 .L35 F46 1993	Complete
"Harlem gallery" and other poems of Melvin B. Tolson /	8/12/2013	Book	PS3539.O334 A6 1999	Complete
"I know it's dangerous" : why Mexicans risk their lives to cross the border /	8/12/2013	Book	JV6483 .S538 2009	Active
"Mixed blood" Indians : racial construction in the early South /	8/12/2013	Book	E78.S65 P46 2003	Complete
"Modernism" in modern drama; a definition and an estimate,	8/12/2013	Book	PN1851 .K7 1962	Complete
"Out of the mouth of hell" : Civil War prisons and escapes /	8/12/2013	Book	E615 .C37 2005	Active
"Race," writing, and difference /	8/12/2013	Book	PN56.R 18 R3 1986	Complete
"Surely you're joking, Mr. Feynman!" : adventures of a curious character /	8/12/2013	Book	QC16.F49 A37 1985	Complete
"This is the Zodiac speaking" : into the mind of a serial killer /	8/12/2013	Book	HV6533.C2 K45 2002	Complete
"To make America" : European emigration in the early modern period /	8/12/2013	Book	E29 .E87 T6 1991	Complete
"We're the Light Crust Doughboys from Burrus Mill" : an oral history /	8/12/2013	Book	ML421.L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.	8/12/2013	Book	PQ7297.A1 C63	Active
$40 million slaves : the rise, fall, and redemption of the Black athlete /	8/12/2013	Book	GV583 R46 2006	Active

Figure 89: Example Report

4. From the field to which you want to add text, click the More Options icon and select **Edit Formula**. The Edit Column Formula page is displayed:

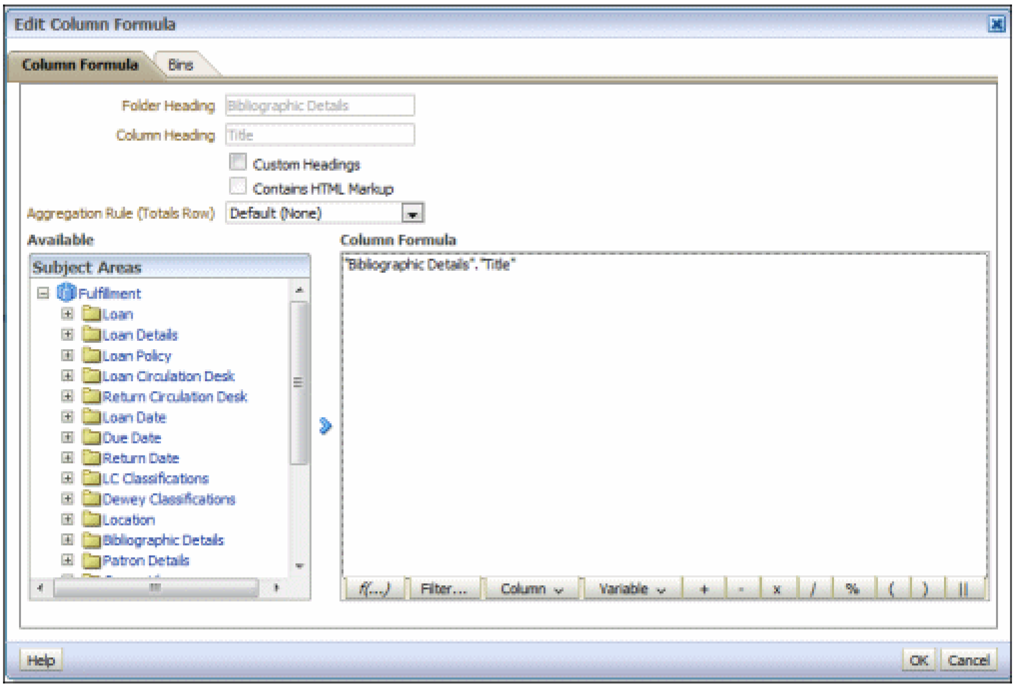


Figure 90: Edit Column Formula

5 Insert the double pipe (||) symbol after the existing column formula by entering it manually or by clicking the double pipe symbol at the bottom of the page.

6 After the double pipe symbol, enter the text you want to add surrounded by single quotes, and click **OK**. In this example, we add `'###'`.

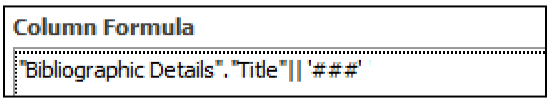


Figure 91: Column Formula with Text to Be Added

The text is added to the results and the column name.

Title || '###'	Creation Date	Material Type	Call Number	Loan Status
"An anarchy in the mind and in the heart" : narrating Anglo-Ireland /###	8/12/2013	Book	PR8803 .W65 2006	Complete
"Can we all get along?" : racial and ethnic minorities in American politics /###	8/12/2013	Book	E184 .A1 M127 1995	Active
"Captains courageous"; a story of the Grand banks,###	8/12/2013	Book	PR4854 .C3 1899	Active
"Chatter" : language and history in Kierkegaard /###	8/12/2013	Book	B4378 .L35 F46 1993	Complete
"Harlem gallery" and other poems of Melvin B. Tolson /###	8/12/2013	Book	PS3539.O334 A6 1999	Complete
"Mixed blood" Indians : racial construction in the early South /###	8/12/2013	Book	E78.S65 P46 2003	Complete
"Modernism" in modern drama; a definition and an estimate,###	8/12/2013	Book	PN1851 .K7 1962	Complete
"Out of the mouth of hell" : Civil War prisons and escapes /###	8/12/2013	Book	E615 .C37 2005	Active
"Race," writing, and difference /###	8/12/2013	Book	PN56.R18 R3 1986	Complete
"This is the Zodiac speaking" : into the mind of a serial killer /###	8/12/2013	Book	HV6533.C2 K45 2002	Complete
"To make America" : European emigration in the early modern period /###	8/12/2013	Book	E29 .E87 T6 1991	Complete
"We're the Light Crust Doughboys from Burrus Mill" : an oral history /###	8/12/2013	Book	ML421.L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.###	8/12/2013	Book	PQ7297.A1 C63	Active

Figure 92: Report with Added Text

7 To remove the text from the column heading, click the More Options icon and select **Column Properties > Column Format**. The Column Format tab is displayed:

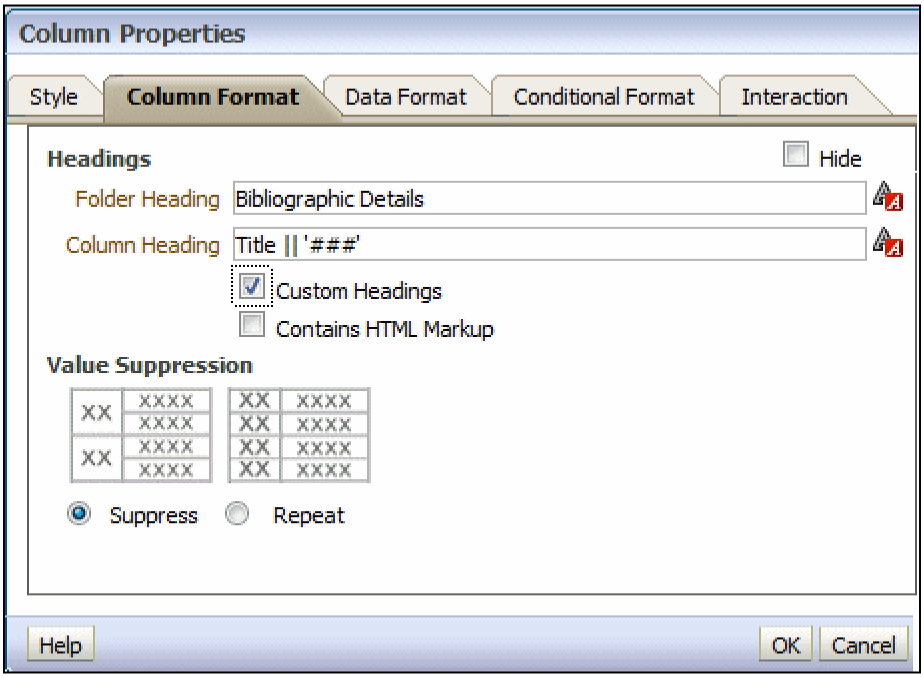


Figure 93: Column Format

8 Click **Custom Headings** and change the column heading name.

9 Click **OK**.

10 The column heading is changed.

Title	Creation Date	Material Type	Call Number	Loan Status
"An anarchy in the mind and in the heart" : narrating Anglo-Ireland /###	8/12/2013	Book	PR8803 .W65 2006	Complete
"Can we all get along?" : racial and ethnic minorities in American politics /###	8/12/2013	Book	E184 .A1 M127 1995	Active
"Captains courageous"; a story of the Grand banks,###	8/12/2013	Book	PR4854 .C3 1899	Active
"Chatter" : language and history in Kierkegaard /###	8/12/2013	Book	B4378 .L35 F46 1993	Complete
"Harlem gallery" and other poems of Melvin B. Tolson /###	8/12/2013	Book	PS3539.O334 A6 1999	Complete
"Mixed blood" Indians : racial construction in the early South /###	8/12/2013	Book	E78.S65 P46 2003	Complete
"Modernism" in modern drama; a definition and an estimate,###	8/12/2013	Book	PN1851 .K7 1962	Complete
"Out of the mouth of hell" : Civil War prisons and escapes /###	8/12/2013	Book	E615 .C37 2005	Active
"Race," writing, and difference /###	8/12/2013	Book	PN56.R18 R3 1986	Complete
"This is the Zodiac speaking" : into the mind of a serial killer /###	8/12/2013	Book	HV6533.C2 K45 2002	Complete
"To make America" : European emigration in the early modern period /###	8/12/2013	Book	E29 .E87 T6 1991	Complete
"We're the Light Crust Doughboys from Burrus Mill" : an oral history /###	8/12/2013	Book	ML421.L485 B68 2003	Complete
"With his pistol in his hand," a border ballad and its hero.###	8/12/2013	Book	PQ7297.A1 C63	Active

Figure 94: Report

Creating a Report of All Bibliographic Records That Have Holdings in More Than One Library

This report displays all bibliographic records that have holdings in more than one library.

To create a report of all bibliographic records that have holdings in more than one library:

1. From the Alma Main Menu, select **Administration > Analytics > Design Analytics** to open Alma Analytics.
2. Select **New > Analysis** and then select **Select Subject Area > Physical Items**.
3. Create a report with the following columns, for example:
   - Bibliographic Details > MMSID
   - Bibliographic Details > Title
   - Another field to serve as a placeholder for a column. (It does not matter what it is, because its formula will be changed.) For example, Physical Item Details > Provenance Code.

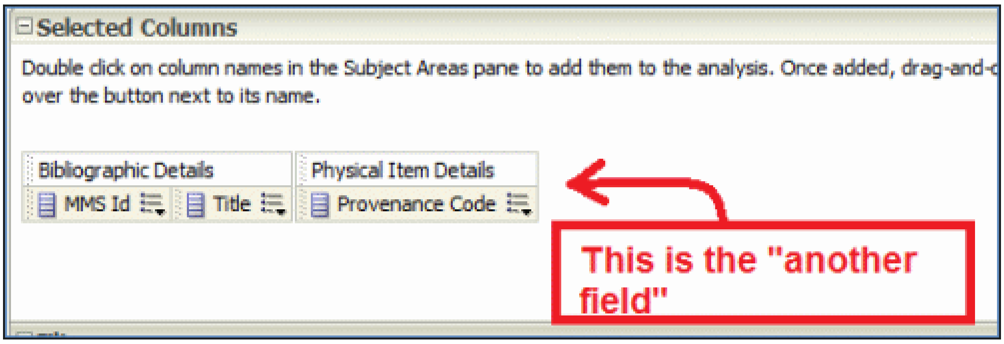


Figure 95: Selected Columns

4 In the lower pane, add a filter for Physical Item Details.Life Cycle to be active so that the report does not include deleted items.

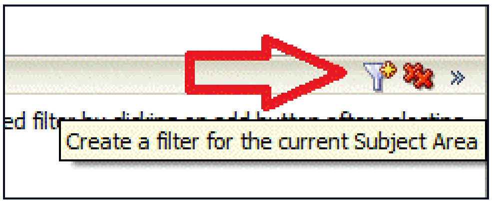


Figure 96: Create Filter

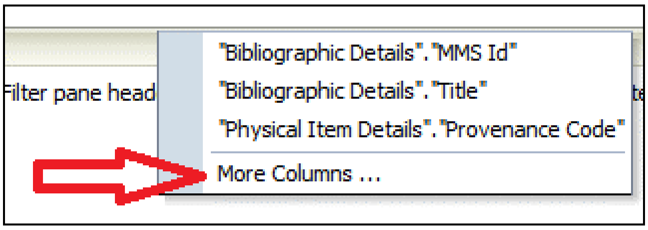


Figure 97: More Columns

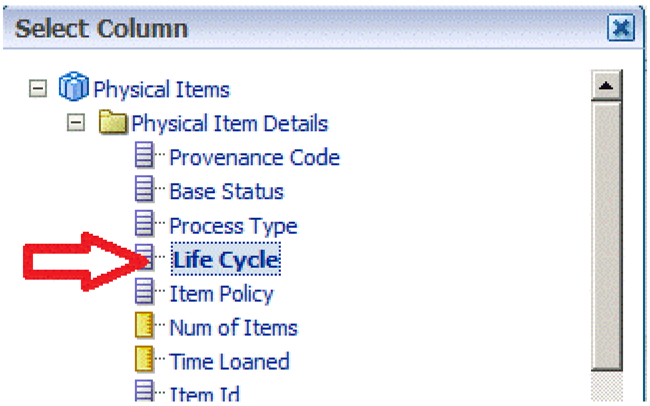


Figure 98: Life Cycle

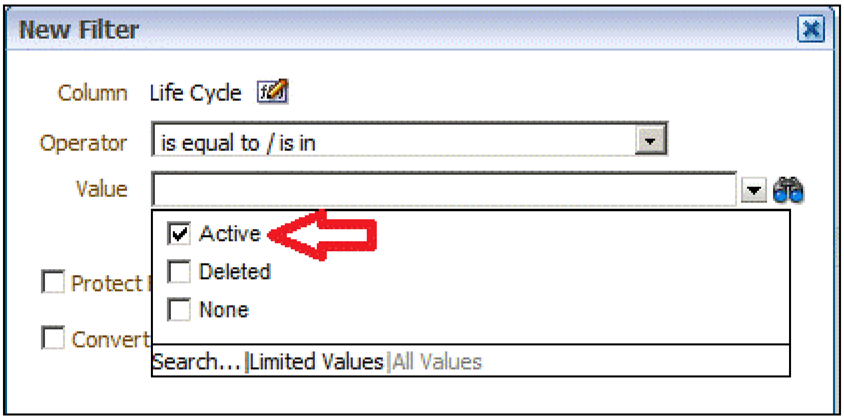


Figure 99: Active

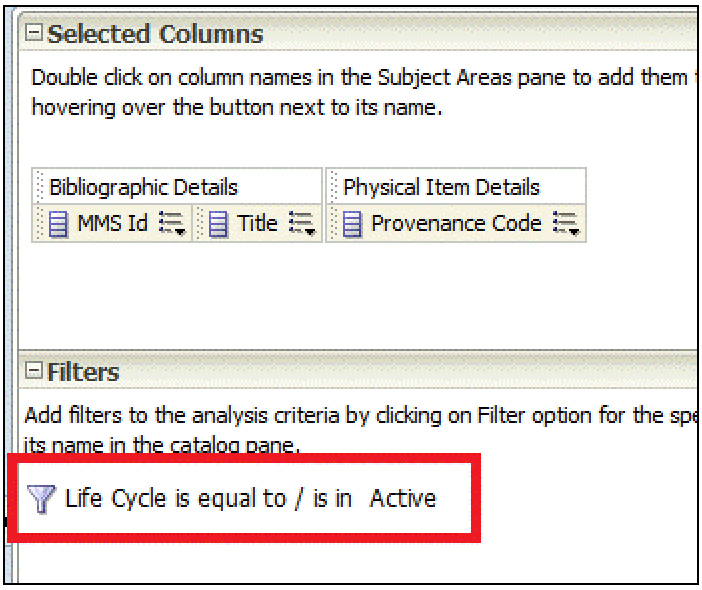


Figure 100: Life Cycle is Equal to Active

5 Edit the formula of Physical Item Details > Provenance Code (the placeholder column) to perform a distinct count of library codes related to the bibliographic record.

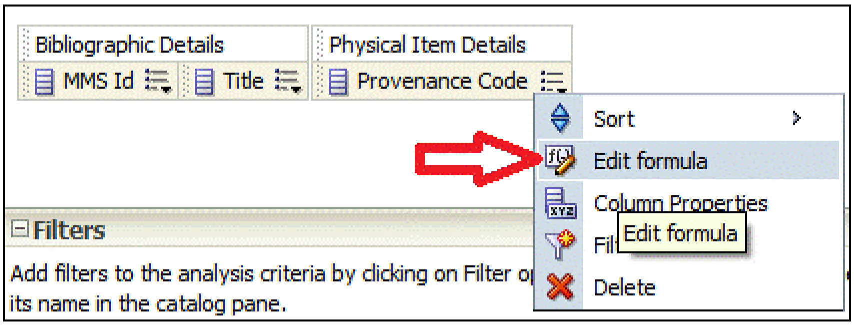


Figure 101: Edit Formula

6 Remove the existing formula and add a function for a distinct count.

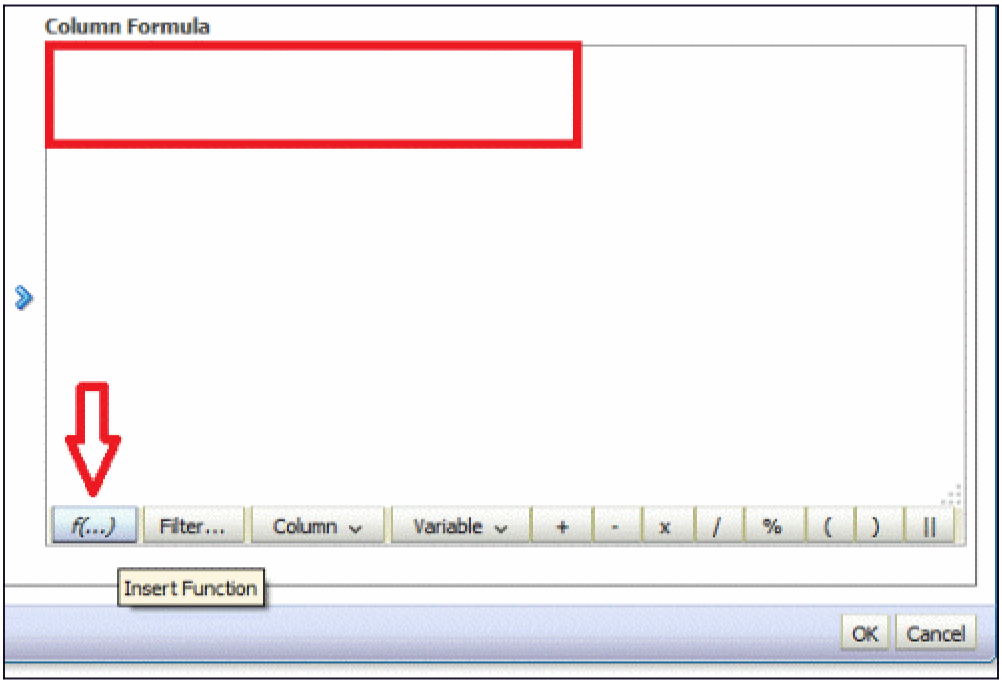


Figure 102: Insert Function

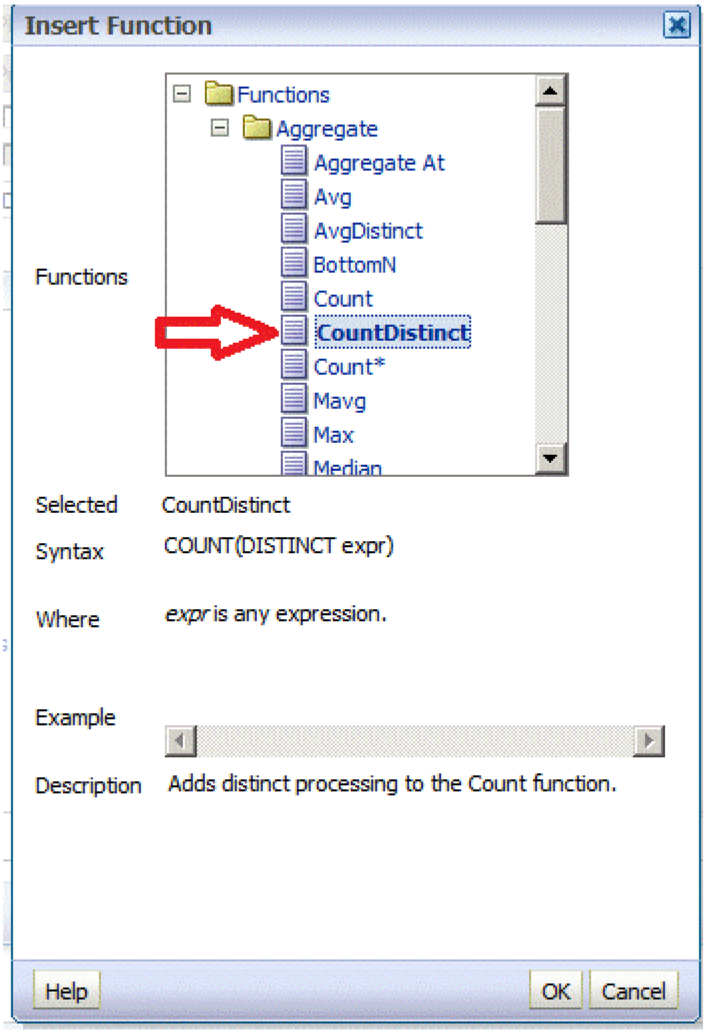


Figure 103: Count Distinct

The formula is now `COUNT(DISTINCT expr)`.

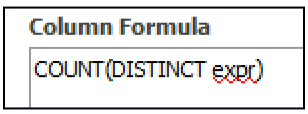


Figure 104: Column Formula

7 Change the Column Formula to count the library code by the MMS Id:

```
COUNT(DISTINCT  "Location"."Library Code" by "Bibliographic
Details"."MMS Id")
```

8 Change the column header to an appropriate name, for example, **Number of libraries**.

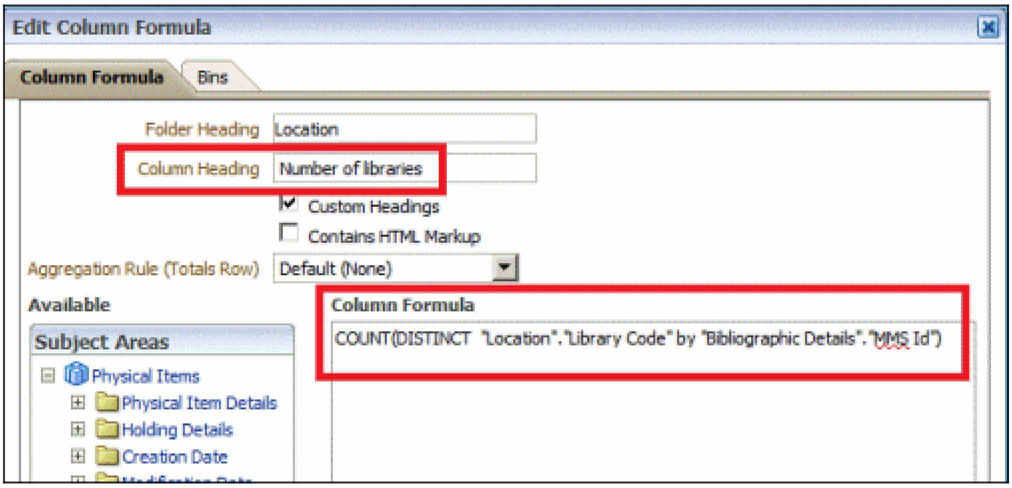


Figure 105: Edit Column Formula

9 Filter the column with the count of libraries to have only rows with two or more libraries (is greater than or equal to 2):

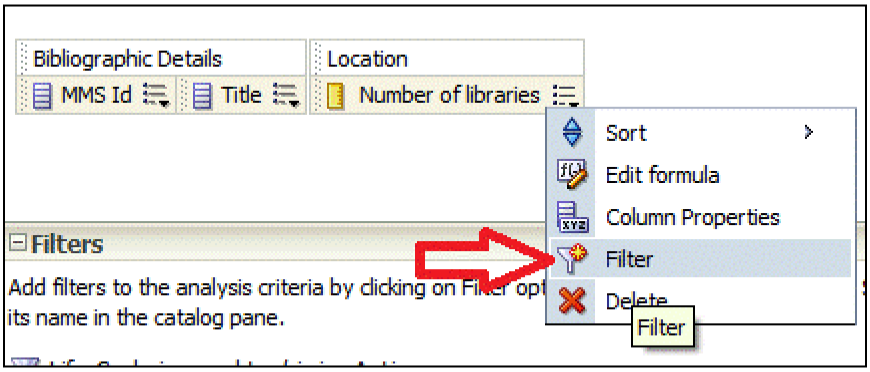


Figure 106: Filter

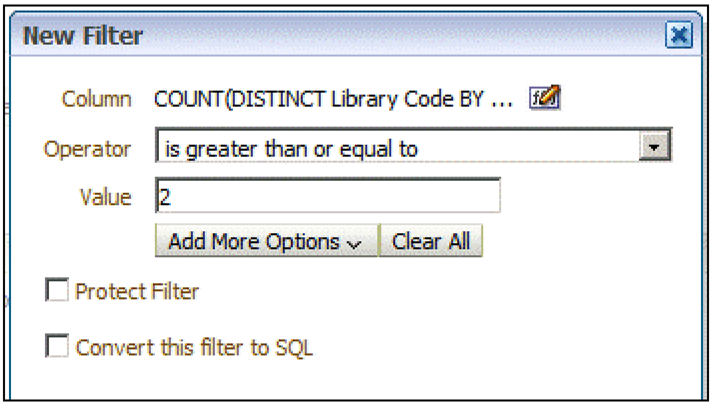


Figure 107: New Filter

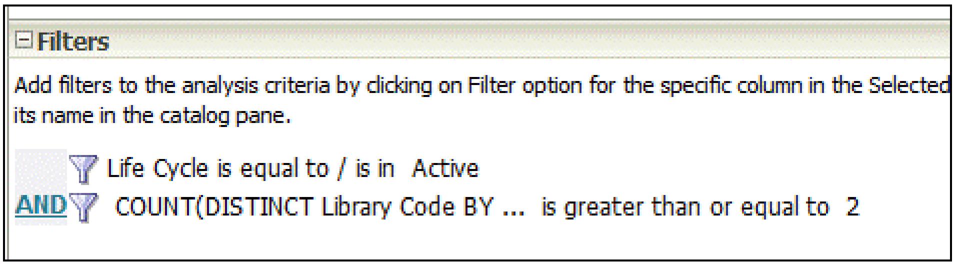
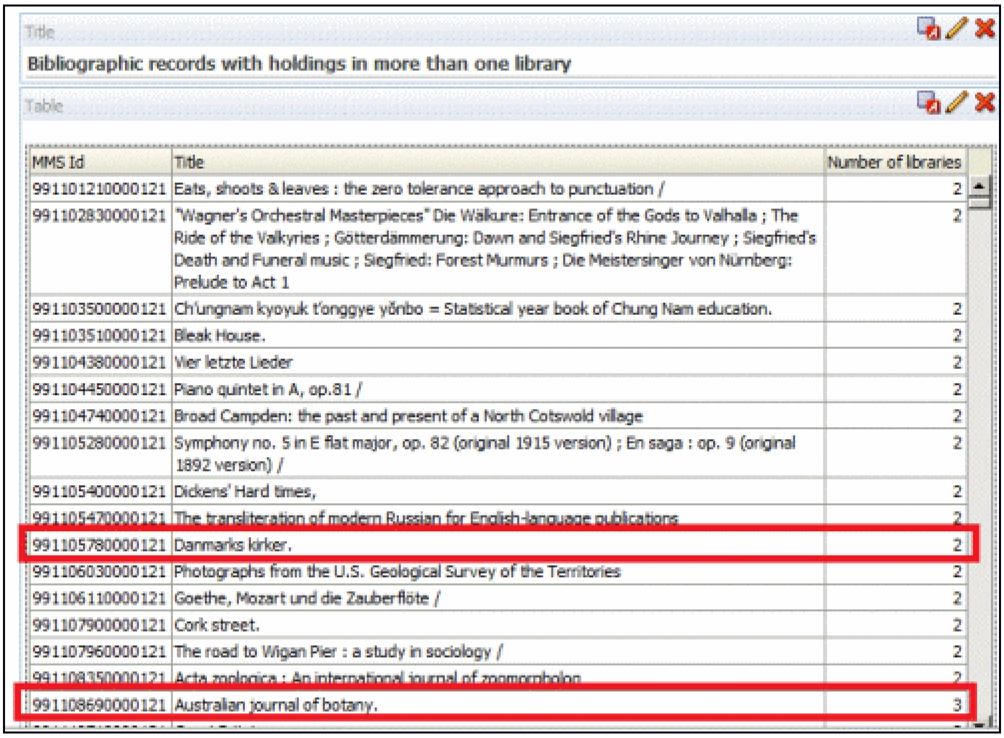


Figure 108: Filters

10 Click the **Criteria** tab to display the results. For example:

- `MMS ID 991105780000121 Danmarks kirker` – which has holdings in two libraries
- `MMS ID 991108690000121 Australian journal of botany` – which has holdings in three libraries



Title

Bibliographic records with holdings in more than one library

Table

MMS Id	Title	Number of libraries
991101210000121	Eats, shoots & leaves : the zero tolerance approach to punctuation /	2
991102830000121	"Wagner's Orchestral Masterpieces" Die Walkure: Entrance of the Gods to Valhalla ; The Ride of the Valkyries ; Götterdämmerung: Dawn and Siegfried's Rhine Journey ; Siegfried's Death and Funeral music ; Siegfried: Forest Murmurs ; Die Meistersinger von Nürnberg: Prelude to Act 1	2
991103500000121	Ch'ungnam kyoyuk t'onggye yŏnbo = Statistical year book of Chung Nam education.	2
991103510000121	Bleak House.	2
991104380000121	Vier letzte Lieder	2
991104450000121	Piano quintet in A, op.81 /	2
991104740000121	Broad Campden: the past and present of a North Cotswold village	2
991105280000121	Symphony no. 5 in E flat major, op. 82 (original 1915 version) ; En saga : op. 9 (original 1892 version) /	2
991105400000121	Dickens' Hard times,	2
991105470000121	The transliteration of modern Russian for English-language publications	2
991105780000121	Danmarks kirker.	2
991106030000121	Photographs from the U.S. Geological Survey of the Territories	2
991106110000121	Goethe, Mozart und die Zauberflöte /	2
991107900000121	Cork street.	2
991107960000121	The road to Wigan Pier : a study in sociology /	2
991108350000121	Acta zoologica : An international journal of zoomorpholog	2
991108690000121	Australian journal of botany.	3

Figure 109: Report Results

The following is `MMS ID 991105780000121 Danmarks kirker` which has holdings in two libraries:

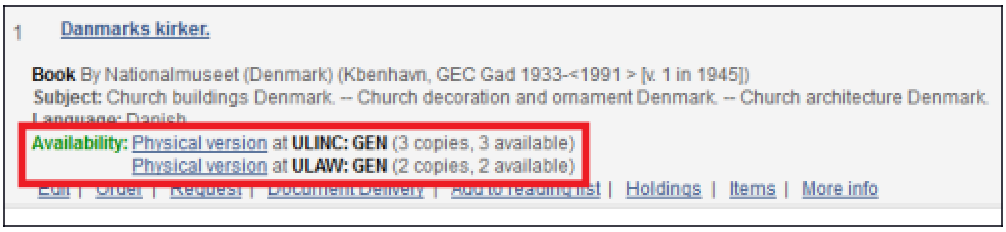


Figure 110: Danmarks Kirker

The following is `MMS ID 991108690000121 Australian journal of botany` which has holdings in three libraries:

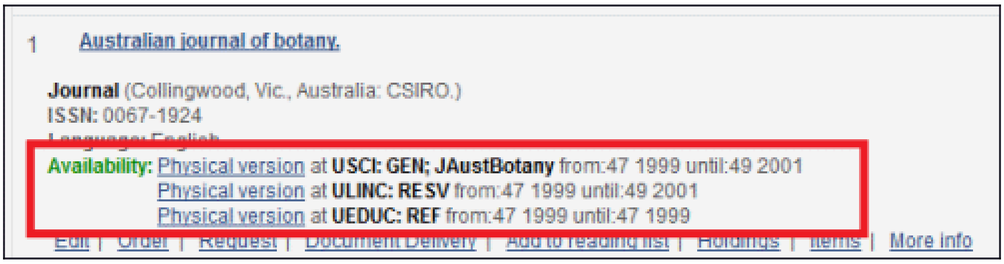


Figure 111: Australian Journal of Botany

Using the CASE Condition in an Alma Analytics Report to Change Text

You can use the CASE condition to have an alternate text displayed as a value in an analytics report. The syntax is slightly different if the value is numerical or text. In this example, the CASE condition is used to make the following changes:

- the value for the column `Time Loaned`, is changed to `Not Loaned` if the value is `0` and Loaned if the value is not `0`
- the value for the column `Publisher` is changed to `Reidel Publishing` if the value is `Reidel Pub Co`; otherwise, it is not changed

To use the CASE condition:

1 Create a report using, for example, the following columns from the Physical Items subject area:

- Bibliographic Details > MMS ID
- Physical Details > Time Loaned
- Bibliographic Details > Publisher

MMS Id	Time Loaned	Publisher
991463103000 1361	0	enguin
991463105000 1361	0	orld Scientific
991463106000 1361	10	oubleday
991463107000 1361	0	errill
991463110000 1361	2	arperPerennial
991463111000 1361	0	ryden Press
991463115000 1361	2	dams Media
991463118000 1361	1	acmillan
991463122000 1361	1	lsevier Saunders
991463124000 1361	0	eidel Pub Co
991463126000 1361	0	ife Insurance Federation of Australia
991463128000 1361	0	uke University Press
991463130000 1361	0	ryphon
991463133000 1361	0	ams
991463135000 1361	0	ethuen
991463139000 1361	0	niversity of Queensland Press
991463142000 1361	1	oubleday Australia
991463144000 1361	0	T I S
991463147000 1361	1	pringer
991463150000 1361	0	vionics Communications

Figure 112: Time Loaned

2. From the Criteria column, click the More Options icon of the Time Loaned column and select **Edit Formula**. The Column Formula dialog box is displayed:

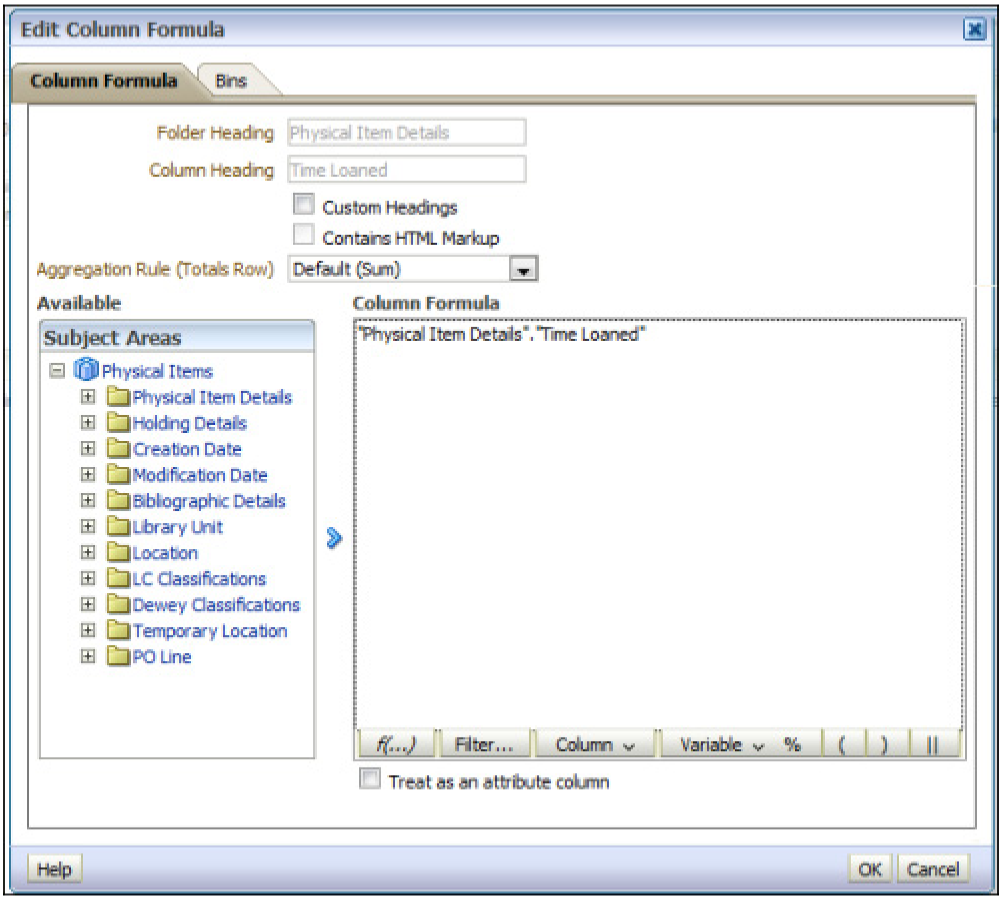


Figure 113: Edit Column Formula – Time Loaned

3 In the Column Formula box, insert one of the following formulas instead of the existing text and change the folder heading, if desired:

- `CASE "Physical Item Details"."Time Loaned" WHEN 0 THEN 'Not Loaned' ELSE 'Loaned' END`
- `CASE WHEN "Physical Item Details"."Time Loaned" = 0 THEN 'Not Loaned' ELSE 'Loaned' END`

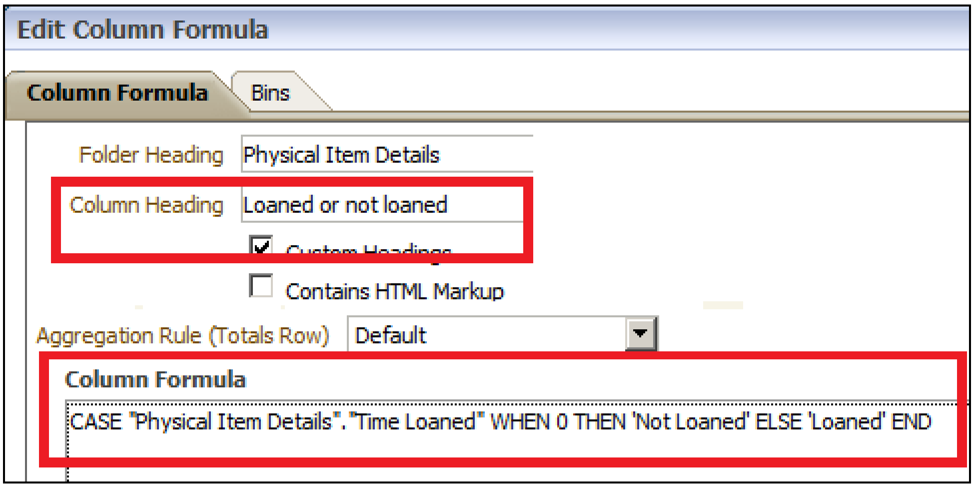


Figure 114: Edit Column Formula for Time Loaned – CASE Condition

4. From the Criteria column, click the More Options icon of the Publisher column and select **Edit Formula**.
5. In the Column Formula box, insert the following formula instead of the existing text and change the folder heading, if desired. (Note the single quotes around the conditional text):

```
CASE "Bibliographic Details"."Publisher" WHEN 'Reidel Pub Co'
THEN 'Reidel Publishing' ELSE "Bibliographic
Details"."Publisher" END
```

NOTE:

If you copy and paste the above text, it is recommended to manually retype the single quotes because the Windows copy and paste feature may change them to a different character, resulting in an error message.

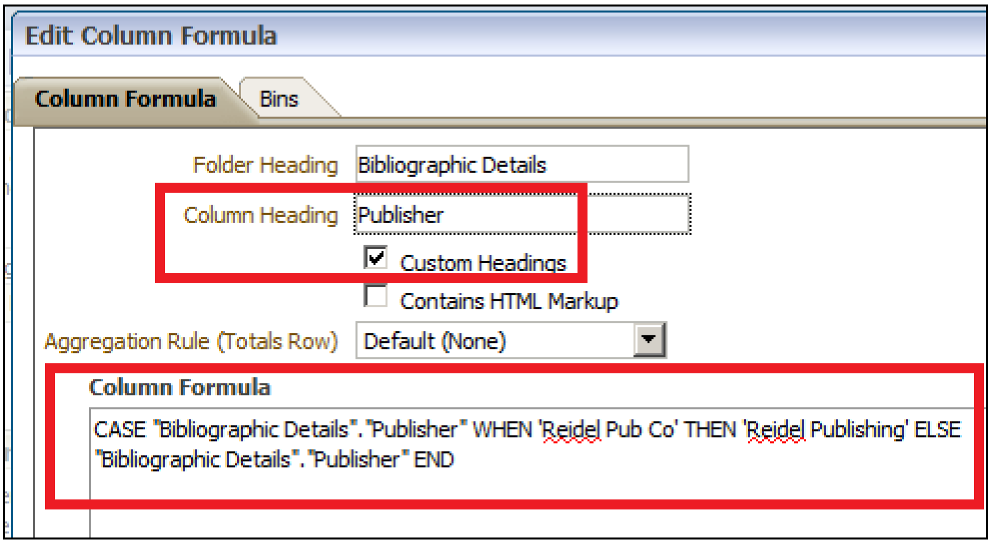


Figure 115: Edit Column Formula for Publisher

The following report displays the changed results:

MMS Id	Loaned or not loane	Publisher
991463103000136	Not Loaned	Penguin
991463105000136	Not Loaned	World Scientific
991463106000136	Loaned	Doubleday
991463107000136	Not Loaned	Merrill
991463110000136	Loaned	HarperPerennial
991463111000136	Not Loaned	Dryden Press
991463115000136	Loaned	Adams Media
991463118000136	Loaned	Macmillan
991463122000136	Loaned	Elsevier Saunders
991463124000136	Not Loaned	Reidel Publishing
991463126000136	Not Loaned	Life Insurance Federation of Australia
991463128000136	Not Loaned	Duke University Press
991463130000136	Not Loaned	Gryphon
991463133000136	Not Loaned	Sams
991463135000136	Not Loaned	Methuen
991463139000136	Not Loaned	University of Queensland Press
991463142000136	Loaned	Doubleday Australia
991463144000136	Not Loaned	N T I S
991463147000136	Loaned	Springer
991463150000136	Not Loaned	Avionics Communications

Figure 116: Results With CASE Condition

Adding an Export Link to Dashboards

You can add an **Export** link to reports that you put into dashboards. The dashboard is exported to Excel.

NOTE:
You can add an **Export** link only to dashboards that you create, not out-of-the-box dashboards.

To add an Export link in dashboards:

1 Click the Page options icon in the top-right of the page of the dashboard and select **Edit Dashboard**. The dashboard moves to edit mode.

1 Select the report to which you want to add the Export link.

2 Select the Properties icon in the report and select **Report Links**. The following is displayed:

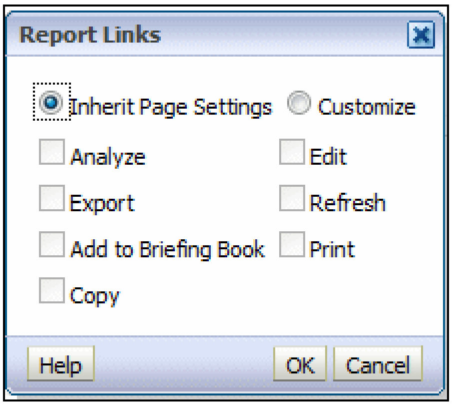


Figure 117: Report Links

3 Select **Customize** and **Export** and click **OK**.

4 Click the Save icon

5 Click **Run**.

The **Export** link is addded to the bottom of the report:

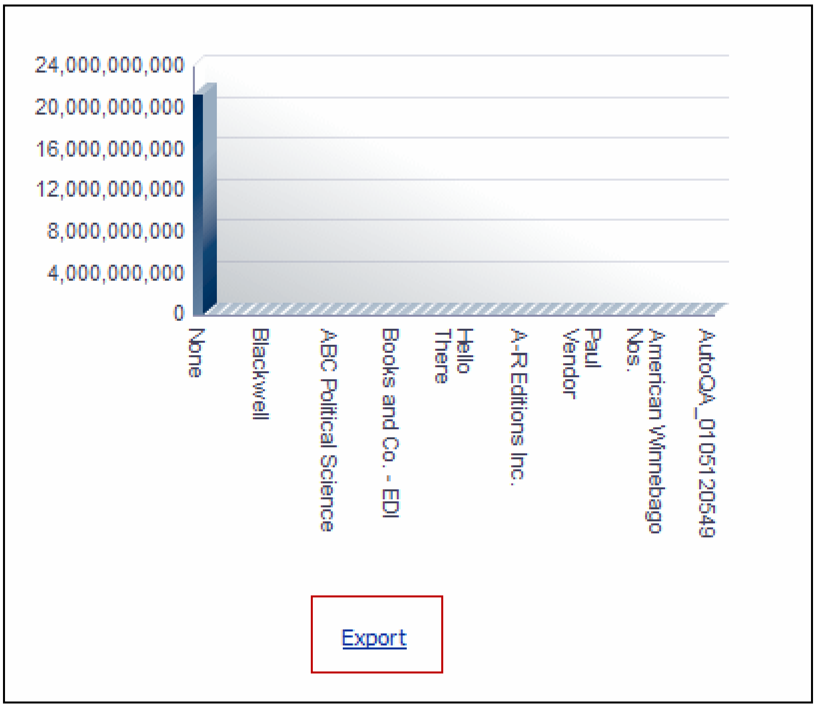


Figure 118: Export Link

6

Out-of-the-Box-Reports

The following table describes the out-of-the-box reports that are available to you in Alma Analytics:

Table 2. Out-of-the-Box-Reports

Report	Description
Acquisitions (based on Funds Expenditures SA)	
Detailed Expenditures	Displays fund, title, and price information for items.
Expenditure Per Acquisition Method	Displays annual expenditures per acquisition method.
Expenditure Per Acquisition Method – Annual Trend	Displays a line chart of annual expenditures per acquisition method.
Expenditure Per Acquisition Method - Top 10	Displays a bar chart of the top 10 expenditures per acquisition method.
Expenditure Per Classifications	Displays annual expenditure per classification.
Expenditure Per Classifications - Top 10	Displays a bar chart of the top 10 annual expenditures per classification.
Expenditure Per Fund Ledger Code	Displays annual expenditures per fund ledger code.
Expenditure Per Fund Ledger Code - Top 10	Displays a bar chart of the top 10 expenditures per fund ledger code.
Expenditure Per Fund Ledger Transaction Type	Displays encumbrance, expenditure, and remaining allocation per fund ledger type.
Expenditure Per Metadata Type	Displays annual expenditure per metadata type, format, and continuity.
Expenditure Per Metadata Type - Annual Trend	Displays a line chart of annual expenditure per metadata type.

Table 2. Out-of-the-Box-Reports

Report	Description
Expenditure Per Metadata Type - Pie	Displays a pie chart of expenditure per metadata type.
Expenditure Per Reporting Code	Displays annual expenditure per reporting code.
Expenditure Per Reporting Code - Top 10	Displays a bar chart of the top 10 expenditures per reporting code.
Expenditure Per Reporting Code - Top 10 Pie	Displays a pie chart of the top 10 expenditures per reporting code.
Expenditure Per Transaction Item Type Current Year	Displays a pie chart of the transaction item types for the current year.
Expenditure Per Vendor	Displays annual expenditures per vendor.
Expenditure Per Vendor - Top 10	Displays a bar chart of the top 10 expenditures per vendor.
Expenditure Per Year - Month	Displays a bar chart of annual expenditures per month.
Expenditures Per Material Type YTD	Displays a pie chart of annual expenditures per material type.
Funds Burn Down - Pivot	Displays remaining allocation of funds per month.
Funds Burn Down - Pivot--tmp	Displays a chart and pivot table of the remaining allocation of funds per month.
Funds Burn Down - Table Only	Displays a table of the remaining allocation of funds per month.
Funds Burn Down per Fund Ledger - YTD	Displays remaining allocation of funds per fund ledger per month.
Top 5 Vendors Spending YTD	Displays a bar chart of the top 5 spending per vendor.
Cost Per Use	
Cost Per Use Journal Details	Displays journal cost, usage, and cost per use per fiscal year.
Cost Per Use Package Details	Displays the package cost, usage, and cost per use per fiscal year.
Least Expensive Journals	Displays a bar chart of the 10 least expensive journals (based on cost per use).

Table 2. Out-of-the-Box-Reports

Report	Description
Least Expensive Packages	Displays a bar chart of the 10 least expensive packages (based on cost per use).
Most Expensive Journals	Displays a bar chart of the 10 most expensive journals (based on cost per use).
Most Expensive Packages	Displays a bar chart of the 10 most expensive packages (based on cost per use).
Package Cost Per Use - Annual Trend	Displays a line chart of the year over year comparison of the monthly cost per use per package.
Title Cost Per Use - Annual Trend	Displays a line chart of the year over year comparison of the monthly cost per use per title.
E-Inventory	
Electronic Inventory Count	Displays a count of electronic items grouped by material type
Electronic Collections - Drill Down to Portfolio	Displays a list of electronic collections from which you can drill down to the portfolios.
Portfolio List	Displays a list of portfolios.
Top 10 Classifications - Dewey	Displays a bar chart with the ten Dewey classifications with the most portfolios.
Top 10 Classifications - LC	Displays a bar chart with the ten LC classifications with the most portfolios.
Events	
Cataloger Activity	Displays a bar chart and table of records created, deleted, or modified per cataloger.
FERPA Report	Displays a chart describing user access information.
Fulfillment	
Count of Items Loaned - Top 10	Displays a bar chart with the 10 libraries with the most items loaned.
Annual Count of Loans and Renewals	Displays the total number of annual transactions, including loans, renewals, and in-house loans to all borrowers of all libraries according to patron group.
Circulation Notes	Displays a chart of items and their loan notes.
Circulation Statistics by Item Policy	Displays circulation statistics by title.
Count of Items Loaned	Displays the number of items loaned annually per library and location.

Table 2. Out-of-the-Box-Reports

Report	Description
Count of Items Loaned by Patron Group	Displays the number of items loaned annually per library and patron group.
Count of Items Loaned by Patron Group - Pie	Displays a pie chart of items loaned per patron group for the selected library.
Fines and Fees - Pivot Table	A pivot table of fines and fees per library.
General Circulation Statistics	Displays several circulation statistics per library.
Item Circulation Statistics	Displays circulation statistics per item.
Loan Counts by Title	Displays the number of loans per title.
Loans - Items Ratio Per Classification	Displays the ratio of loans per item per classification.
Loans - Items Ratio Per Location	Displays the ratio of loans per item per library and location.
Number of Loans Per Month in the Last 12 Months	Displays a bar chart of the number of loans per month in the last 12 months.
Open Cash Transactions for Patron Status	Displays the amount owed per transaction type.
Recalled Items	Displays recalled item information.
User Cash Transactions	Displays a list of patrons and their fine/fee status.
Inventory	
Item Count by Material Type - All	Displays the number of items per material type.
Detailed Item Count by Library and Location	Displays the number of items per library and location.
Item Count by Library and Location	The number of items per library and location.
Item Count by Material Type	Displays the number of items per material type.
Item Count vs Time Loaned	Displays a bar chart of the number of items loaned per number of times loaned.
Item Withdrawals	Displays the number of items withdrawn per life cycle, base status, and process type.
Items Added	Displays the number of items added per material type.

Table 2. Out-of-the-Box-Reports

Report	Description
Items by Process Type	Displays a list of title information and process type.
Missing Items	Displays items missing from the library.
Physical Inventory Count	Displays a count of physical items grouped by material type
Usage	
Database Usage - Annual Trends	Displays the annual database usage per month.
Database Usage - Titles	Displays a table of the annual database usage per title.
Databases - Most Frequently Used Databases	Displays the most frequently used databases.
Journal Platforms - Most Number of Journals	Displays a bar chart of the journal platforms with the greatest number of journals.
Journal Platforms - Most Requests	Displays a bar chart of the journal platforms with the most successful requests.
Journal Publishers - Most Requests	Displays a bar chart of the journal publishers with the most successful requests.
Journal Subscribers - Most Requests	Displays a bar chart of the journal subscribers with the most successful requests.
Journal Usage - Annual Trends	Displays the annual journal usage per month.
Journal Usage - Titles	Displays a table of the annual journal usage per title.
Most Frequently Used Databases	Displays a bar chart of the most frequently used databases.
Most Frequently Used Journals	Displays a bar chart of the most frequently used journals.
Platforms - All	Displays a table of data for all platforms.
Publisher - Average Usage	Displays a bar chart of the journals with greater average usage.
Publishers - All	Displays a table of data for all publishers.
Subscribers - All	Displays a table of data for all subscribers.
Titles	Displays a table of data for titles.
Usage by Title - Graph	Displays a line chart of monthly usage by title.

7

Industry Statistics Dashboard

The Industry Statistics dashboard contains sample reports that may be useful to institutions that need to send reports to library organizations such as ARL and SCONUL. The dashboard contains four tabs, each containing one or more reports:

- Number of Objects
  - Physical Inventory Count
  - Electronic Inventory Count
- Items Added, Items Withdrawal
  - Items Added to Inventory
  - Items Withdrawn
- Item Count by Library and Location
  - Item Count by Library and Location
- Number of Loans and Renewals
  - Annual Count of Loans Renewals

VIDEO:
For more information concerning the Industry Statistics Dashboard, see the*Analytics: Industry Statistics Dashboard* video.

Industry Statistics Dashboard Reports

The following is an overview of the reports under the Industry Statistics dashboard.

Number of Objects

The Number of Objects tab includes a report for physical inventory count and a report for electronic inventory count, each grouped by material type.

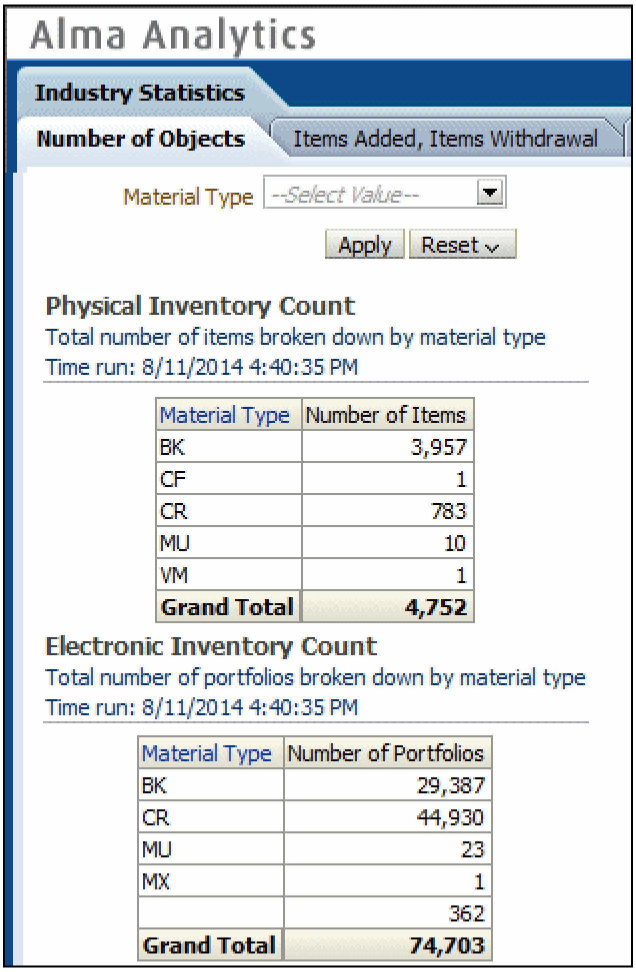


Figure 119: Number of Objects

Items Added, Items Withdrawal

The Items Added, Items Withdrawal tab is for physical inventory and includes two reports. The Items Added to Inventory logic is based on the receiving date and shows all items added in a specified period by library and material type. The Items Withdrawn logic is based on items with `life cycle = deleted` and have a modification date in a specified period (the modification date indicates the time the status was changed.

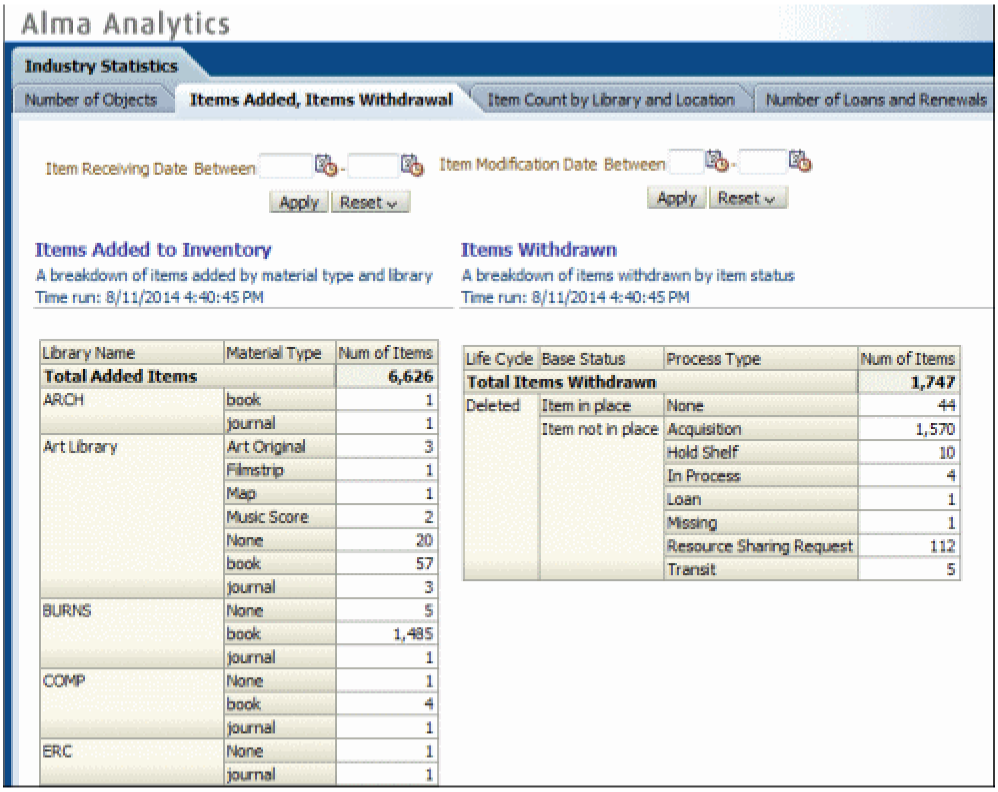
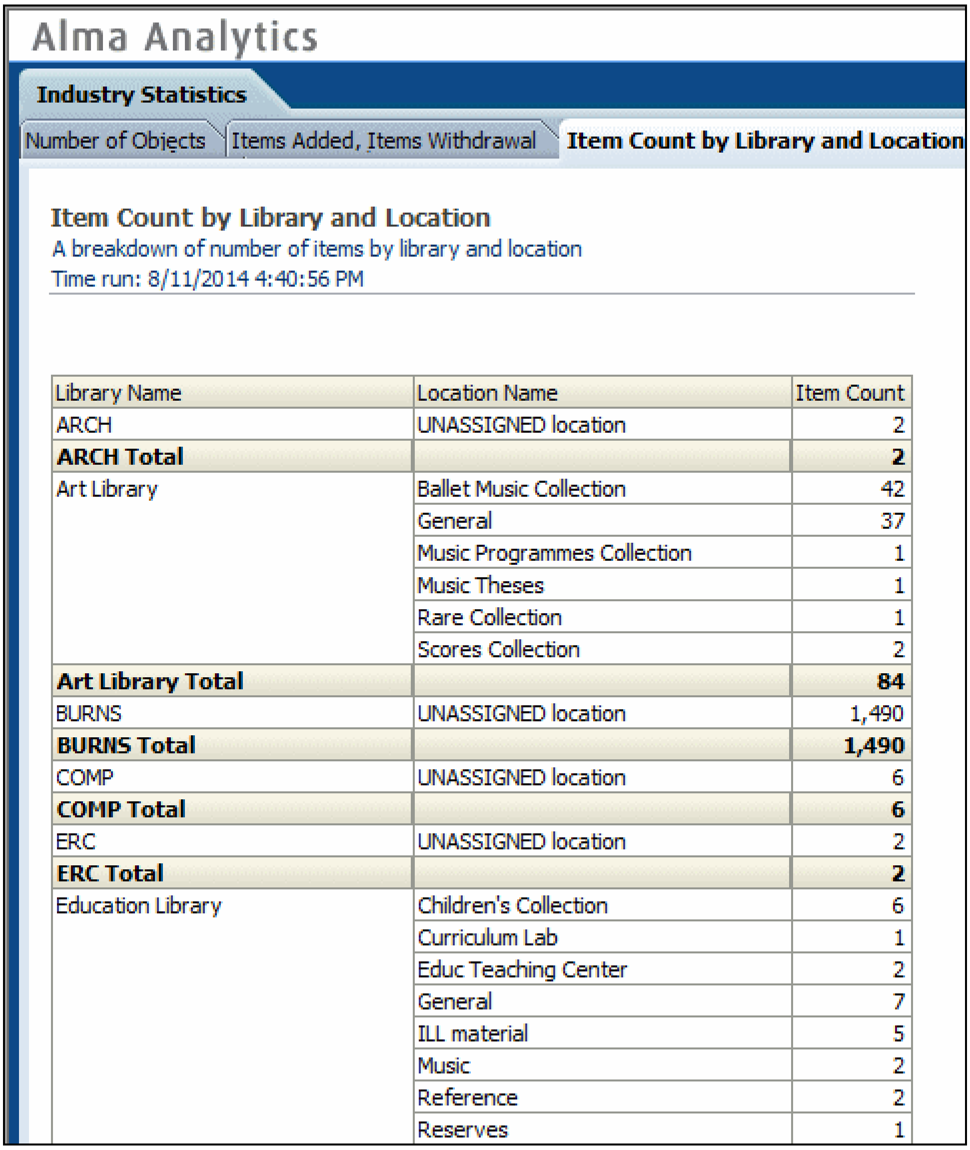


Figure 120: Items Added, Items Withdrawal

Item Count by Library and Location

The Item Count by Library and Location report is also for physical inventory and includes a table with all items according to their library and location.



Item Count by Library and Location
A breakdown of number of items by library and location
Time run: 8/11/2014 4:40:56 PM

Library Name	Location Name	Item Count
ARCH	UNASSIGNED location	2
ARCH Total		**2**
Art Library	Ballet Music Collection	42
	General	37
	Music Programmes Collection	1
	Music Theses	1
	Rare Collection	1
	Scores Collection	2
Art Library Total		**84**
BURNS	UNASSIGNED location	1,490
BURNS Total		**1,490**
COMP	UNASSIGNED location	6
COMP Total		**6**
ERC	UNASSIGNED location	2
ERC Total		**2**
Education Library	Children's Collection	6
	Curriculum Lab	1
	Educ Teaching Center	2
	General	7
	ILL material	5
	Music	2
	Reference	2
	Reserves	1

Figure 121: Item Count by Library and Location

Number of Loans and Renewals

The Number of Loans and Renewals tab contains the Annual Count of Loans Renewals report. It includes a table with the total number of annual transactions, including loans, renewals, and in-house loans to all borrowers of all libraries according to patron group.

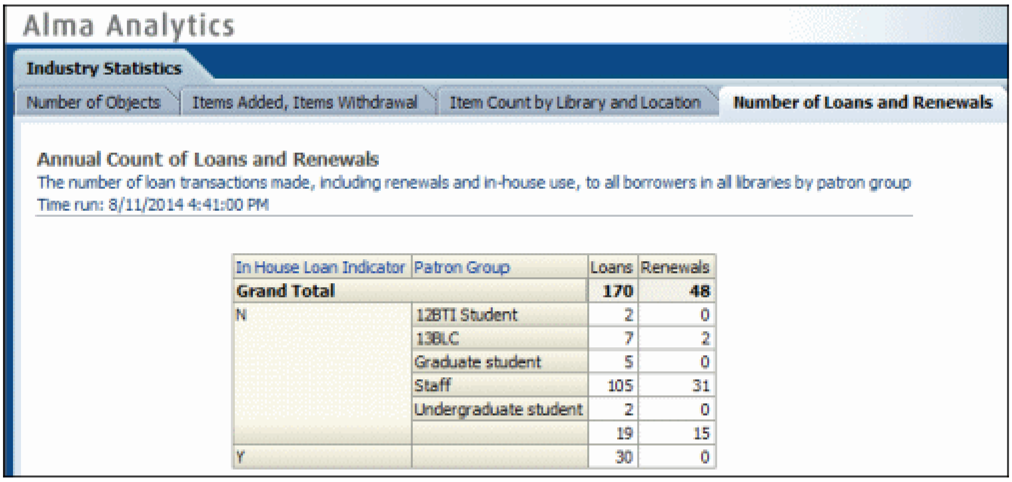


Figure 122: Number of Loans and Renewals

8

Shared Dimensions

Shared dimensions are shared across more than one subject area. They are created for efficiency (both from a development perspective and from a user perspective) and are necessary in order to create cross subject area reports.

This chapter describes in detail all shared dimensions, including where they are used and the list of fields that they contain.

Table 3. Shared Dimensions

Shared Dimension Name	Exists in the Following SA
Bibliographic Details	Funds expenditure, e-Inventory, Fulfillment, Lending Requests, Borrowing Requests, Physical items, Requests, Course Reserves
PO Line	Funds expenditure, e-Inventory (named package PO Line and Portfolio PO Line), Physical items
Library Unit	Funds expenditure, Physical items
LC Classifications	Funds expenditure, e-Inventory, Fulfillment, Physical items, Requests
Dewey Classification	Funds expenditure, e-Inventory, Fulfillment, Physical items, Requests
User Details	Fines and Fees, Fulfillment, Requests, Users

Bibliographic Details

The Bibliographic Details table is a dimension that stores the bibliographic details of the item. This dimension is used across many SA and includes fields mapped from the MARC standard. The following table describes the fields including their mapping from MARC.

Table 4. Bibliographic Details

Field	Source in Alma (for Internal Reference)	Mapping from MARC
Title	Taken from display.title in the display section of the operational record	MARC 245 subfields a,b
Author	Taken from display.author in the display section of the operational record	List values, delimiter is (;) ■ MARC 100 excluding Numeric subfields ■ MARC 110 excluding numeric subfields ■ MARC 111 excluding numeric subfields
ISBN	Taken from search.isbn in the search section of the operational record	List values, delimiter is ; MARC 020 a,e,z
ISSN	Taken from search.issn in the search section of the operational record	List values, delimiter is ; MARC 022 a,y,e,z
Publisher	Taken from display.publisher_const_b in the display section of the operational record	MARC 260 b MARC 264 b Remove special characters and replace spaces.
Publication Date	Taken from display.date_of_publication in the display section of the operational record	MARC 260 c
Publication Place	Taken from display.place_of_publication in the display section of the operational record	MARC 260 a
Place Code	Taken from display.place_code in the display section of the operational record	MARC control 008 Place Of Publication

Table 4. Bibliographic Details

Field	Source in Alma (for Internal Reference)	Mapping from MARC
Material Type	Taken from search. material_type in the search section of the operational record	MARC control LDR Material Type
Begin Publication Date	Taken from display.begin_pub_date in the search section of the operation	MARC control 008 Date1
End Publication Date	Taken from display.end_pub_date in the search section of the operation	MARC control 008 Date2
Category of Material	Taken from display. category_of_material in the display section of the operational record	Position 0 of the 007 field of the bibliographic record
Bibliographic Level	Taken from display.bib_level in the display section of the operational record	Position 7 of the LDR field of the bibliographic record
Type of Record	Taken from display.type_of_record in the display section in the operational record	MARC control LDR Record Type
Bibliographic ID	Taken from display.bib_id in the display section in the operational record	MARC 010 excluding numeric subfields
Network Number	Taken from search. other_system_number in the search section of the operational record	This field is called "other system number" in Alma List values. The delimiter is ; MARC 035 excluding numeric subfields
Edition	Taken from display.complete_edition in the display section of the operational record	MARC 250 subfields a,b

Table 4. Bibliographic Details

Field	Source in Alma (for Internal Reference)	Mapping from MARC
Language Code	Taken from display.language in the display section in the operational record	MARC control 008 Language
Series	Taken from display.series_small in the display section in the operational record	List values, delimiter is ; ■ MARC 830 subfields a,x,v ■ MARC 800 excluding numeric subfields ■ MARC 810 excluding numeric subfields
Subjects	Taken from display.subjects in the display section of the operational record	List values, delimiter is ; MARC 6XX excluding numeric
Type of Date	Taken from display.type_of_date in the search section of the operational record	MARC control 008 TypeOfDate
Uniform Title	Taken from display.uniform_title in the display section of the operational record	MARC 240 excluding numeric subfields MARC 130 subfields a,p

The following table describes other fields in the shared dimension (taken from Alma and not MARC):

Table 5. Bibliographic Details

Field	Source in Alma (for Internal Reference)
MMS ID	Stores the MMS ID of the item
LC Classification Top Line	Stores the combined LC code and classification numbers until the first period followed by a letter such as NB933 when the lc_class_number is NB933.F44
Dewey Classification	Stores the Dewey Classification

Table 5. Bibliographic Details

Field	Source in Alma (for Internal Reference)
Dewey Classification Top Line	Stores the first 3 digits of the Dewey Classification
Local Param1	This field allows you to enrich the bibliographic information exported to Analytics with additional information stored in MARC 9XX local fields in Alma. In order to make use of this field, you must contact Ex Libris Support and supply them with a three-digit MARC field code (for example, 901). Following configuration of this field by Ex Libris Support, its value will be available in analytics.
Local Param2	See the description above.
Local Param3	See the description above.
Local Param4	See the description above
Local Param5	See the description above
Creator	Stores the name of the user that created the record
Creation Date	Stores the creation date
Modified By	Stores the user name that modified the record
Modification Date	Stores the modification date
Suppressed from Discovery	Indicates whether the record is suppressed from external discovery systems

PO Line

The PO Line table is a dimension table that stores details about the PO and the PO Line. The PO line is the management unit of the order. Note that the fields under this dimension are not sorted alphabetically, but logically in most cases, ordered by their place in the PO line creation pages. Also note that this table includes fields for both physical and electronic items although some are relevant only to one of the types.

VIDEO:

For more information about enhancements made to the PO Line, see the *Analytics: PO Line Dimension Enhancements* video (3:45 mins).

Table 6. PO Line

Field	Description	Additional Information
PO Number	Stores the business identifier of the PO related to the PO line.	See the field location in Alma in **Figure 123**
PO Line Reference	Stores the business identifier of the PO line	This is the POL number in Alma. See the field location in Alma in **Figure 123**.
Item Description	Description of the item	The description entered for the PO line. Note that this field is not taken from the bibliographic details. It is useful when no item is related to the PO line. See the field location in Alma in **Figure 123**.
Status	Stores the business status of the PO line as Active, Canceled, or Closed	
Order Line Type	The order line type as it appears in the order in Alma	See the field location in Alma in **Figure 123**
Order Line Type Code	A short code for the Order line type	See the field location in Alma in **Figure 123**
Sent Date	Stores the date that the PO/ PO line is sent to the vendor	See the field location in Alma in **Figure 123**
Currency	The currency of the transaction.	See the field location in Alma in **Figure 124**
List Price	The list price for a single copy of the item	See the field location in Alma in **Figure 124**
Net Price	A calculation of the total price for the PO line based on the list price per copy, the discount, and the number of copies ordered	See the field location in Alma in **Figure 124**

Table 6. PO Line

Field	Description	Additional Information
Quantity For Pricing	The number of items to be paid for.	The quantity for pricing and the number of items to create may be different in a case of discounted pricing through a deal such as "buy two items and get a third item at no additional charge." See the field location in Alma in **Figure 124**
Discount	The discount amount.	See the field location in Alma in **Figure 124**
Vendor Name	The vendor name as defined in the Alma vendor details definitions.	See the field location in Alma in **Figure 126**
Vendor Code	The vendor code as defined in the Alma vendor details definitions.	See the field location in Alma in **Figure 126** below
Vendor Account Description	The vendor description as defined in the Alma vendor account definitions.	See the field location in Alma in **Figure 127**
Vendor Account Code	The vendor description as defined in the Alma vendor account definitions	See the field location in Alma in **Figure 127**
Vendor Contact Person ID	Stores the related vendor contact person ID	
Vendor Reference Number Type	Stores the type of the reference number	See the field location in Alma in **Figure 124**
Vendor Reference Number	Store the reference number for the PO line in Alma, as provided by the vendor. Serves as a matching point for identifying a PO line in Alma	See the field location in Alma in **Figure 124**
Material Supplier	The vendor supplying the material being ordered	The material supplier field as displayed in Alma PO line page. This is a concatenation of: name (code)/account description (account code). See the field location in Alma in **Figure 125**.

Table 6. PO Line

Field	Description	Additional Information
Note To Vendor	Notes to the vendor.	See the field location in Alma in **Figure 128**
Acquisition Method	Stores the method by which the PO Line is acquired with the default value set as Purchase. This value may affect when the PO Line is sent.	See the field location in Alma in **Figure 128**
Rush	Indicates whether the PO line is to be rushed.	See the field location in Alma in **Figure 128**
Cancellation Restriction	Indicates if a cancellation restriction note, containing a warning upon the cancellation of a PO line, is configured to be displayed.	See the field location in Alma in **Figure 128**
Cancellation Restriction Note	The warning to be displayed when canceling a PO line.	See the field location in Alma in **Figure 128**
Cancellation Reason	Stores the reason that a PO line is canceled and displays only on canceled lines. Values are in the code table POLineCancellationReasons	
Is Claimed	Flags the PO Line if there is an open claim to the vendor. A PO line is claimed if the items were not received.	
Shipping Method	Stores the method for the vendor to ship the order	Per the values in Shipping Method code table defined in the acquisition configuration menu
Ship to Address ID	Stores the library shipping address that should be used by the vendor	See the field location in Alma in **Figure 129**
Shipped To Address Line 1-5	The shipped to address lines.	See the field location in Alma in **Figure 129**
Shipped To Address City	The shipped to city.	See the field location in Alma in **Figure 129**
Shipped To Address Country	The shipped to country.	See the field location in Alma in **Figure 129**

Table 6. PO Line

Field	Description	Additional Information
PO Line Creation Date	Stores the timestamp of the PO line creation date.	
PO Line Modification Date	Stores the timestamp of the PO line modification date	
PO Creation Date	Stores the timestamp of the PO creation date	
PO Modification Date	Stores the timestamp of the PO modification date	
Expected Activation Date	Stores the expected date for the resource activation by vendor for electronic PO lines	See the field location in Alma in **Figure 125**
Expected Activation Interval	For electronic PO Lines, the number of days after ordering that you expect electronic orders to be activated	The default value is taken from the Vendor Account Details page. See the field location in Alma in **Figure 125**.
Claiming Date	The number of days from the expected receipt/ activation date to the date on which the PO line is sent to the claims task list	The default value is taken from the Claiming grace period field on the Vendor Account Details
Subscription End Date	Stores the date for the end of subscription for continuous orders	
Expected Receiving Date	Stores the expected date for physical items to be received from the vendor for physical PO lines	The default value is taken from the Vendor Account Details page. See the field location in Alma in **Figure 130**.
Expected Receipt after Ordering Interval	For physical PO Lines, the number of days after ordering that you expect physical orders to be received	See the field location in Alma in **Figure 130**

Table 6. PO Line

Field	Description	Additional Information
Receiving Note	Text enabling the Purchasing Operator to indicate to the Receiving Operator the intended location of serial order items in which no inventory items are created.	
Receiving Status	Stores an indication of whether or not all physical items were received	
Renewal Date	Stores the date of the PO line's next renewal for continuous orders	See the field location in Alma in **Figure 131**
Renewal Reminder Period	Determines how many days before renewal is mail regarding that renewal sent	See the field location in Alma in **Figure 131**
Renewal Cycle	Stores the cycle for the autorenewal job for continuous orders. For example, if it is set to one year, the PO line is renewed in one year.	Defined in RenewalCycle code table. See the field location in Alma in **Figure 131**
Manual Renewal	Stores an indication that the PO line is renewed manually or automatically	See the field location in Alma in **Figure 131**.
PO Creator	Stores the user name that created the PO	
PO Line Creator	Stores the user name that created the PO line	
PO Modified By	Stores the user name that modified the PO	
PO Line Modified By	Stores the user name that modified the PO line	

Table 6. PO Line

Field	Description	Additional Information
Interested Users	Displays the interested users for the PO line. in case more than one user is added to the PO line, values are concatenated	List of interested user in Alma is displayed in the interested users tab of the PO line. Note that in order to search for a specific user, you should use the contain filter in order to find also cases that more than 1 user was added to the PO.
Assigned To	Stores the user that is assigned to the order	
Application	Used for identifying migrated lines	
CKB ID	Stores a reference to the electronic collection PID for electronic PO lines	
License ID	Stores the ID of the license of the PO line that is relevant for electronic PO lines	
Source Type	Stores the source from which the PO line originated. Values for example: EOD, Manual, Migration, and so forth	
Source ID	Stores the source file ID used for the EOD lines	
Associated PO Line	PO line associated with the current one	
Association Type		
Additional Order Reference		This field will be deprecated in a future release.

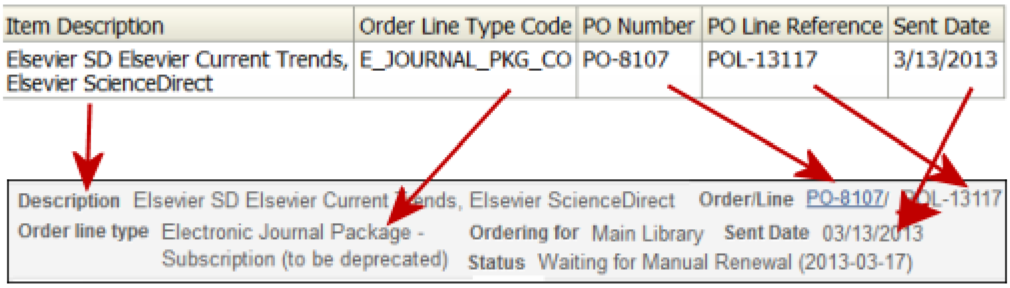


Figure 123: PO Line Summary Page

NOTES:

- The order type will be added to analytics in a future release. Currently the order type code is available.
- The PO line status is not currently mapped to analytics and will be added in a future release.

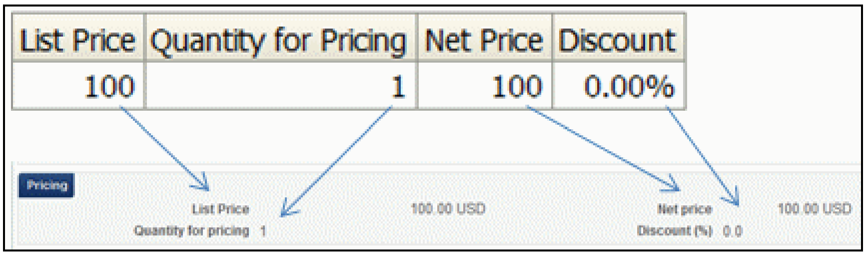


Figure 124: Alma PO Line Page – Pricing Information

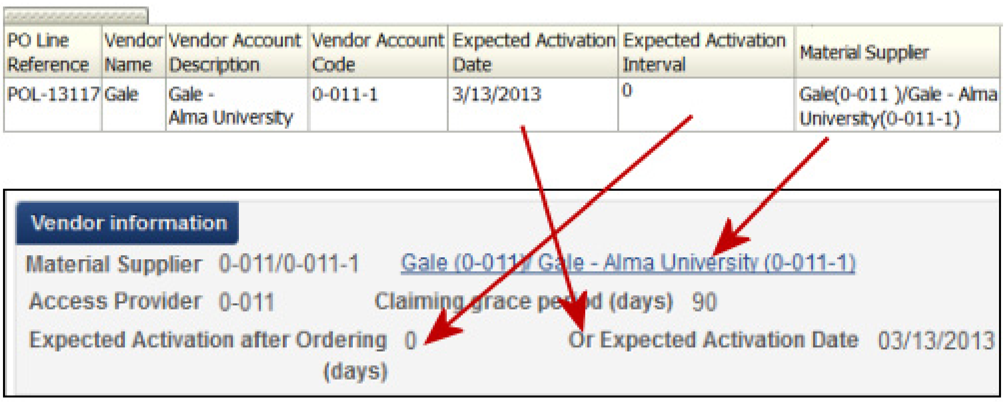


Figure 125: Alma PO Line Page – Vendor Information

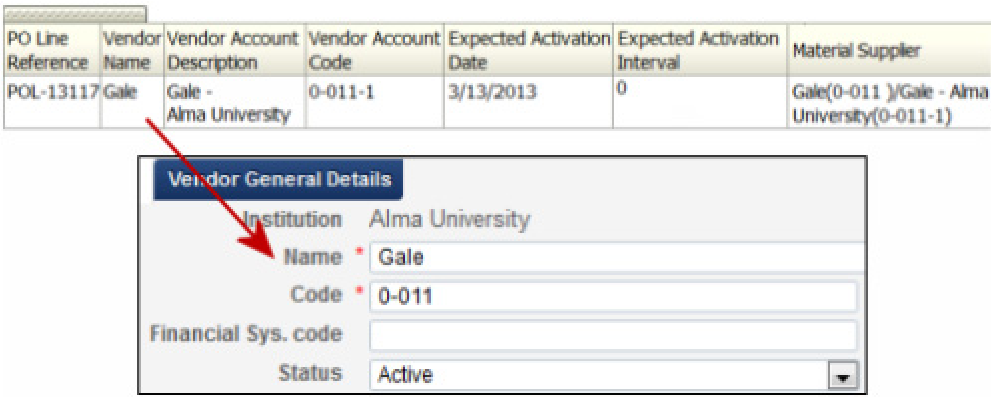


Figure 126: Alma Vendor Details Page – Vendor General Details

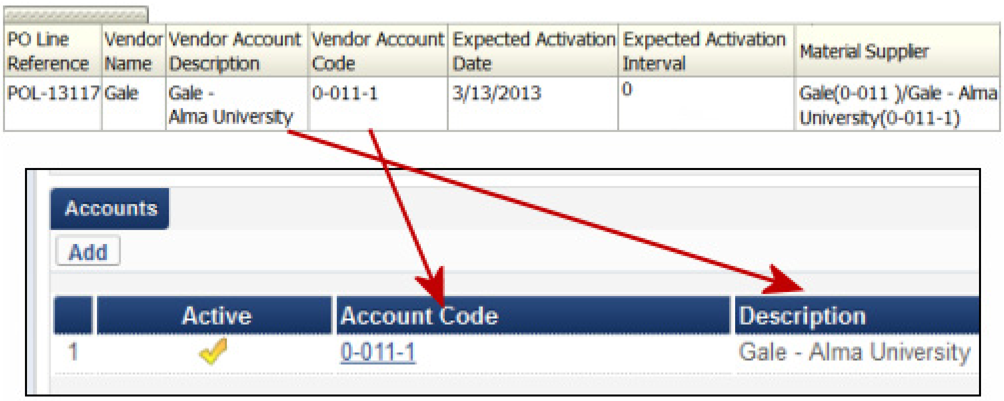


Figure 127: Alma Vendor Details Page – Accounts

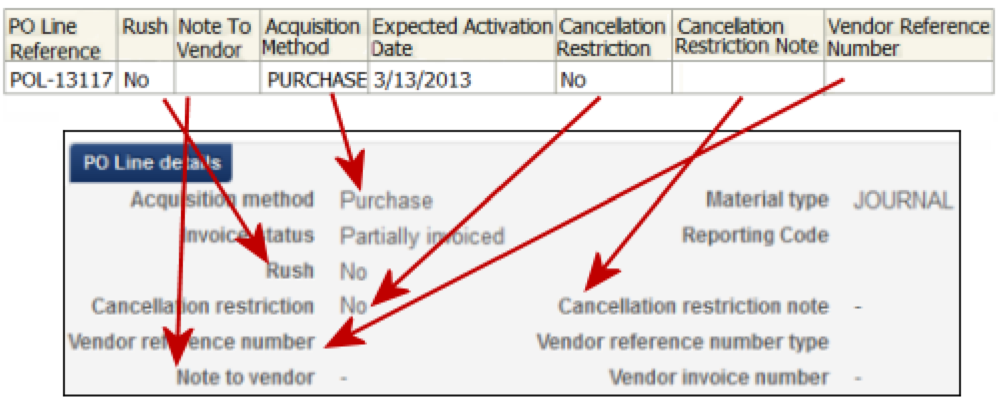


Figure 128: Alma PO Line Page – PO Line Details

PO Line Reference	Ship to Address Line1	Ship to Address City	Ship to Address Country
POL-7416	237 Center Street	Centreville	

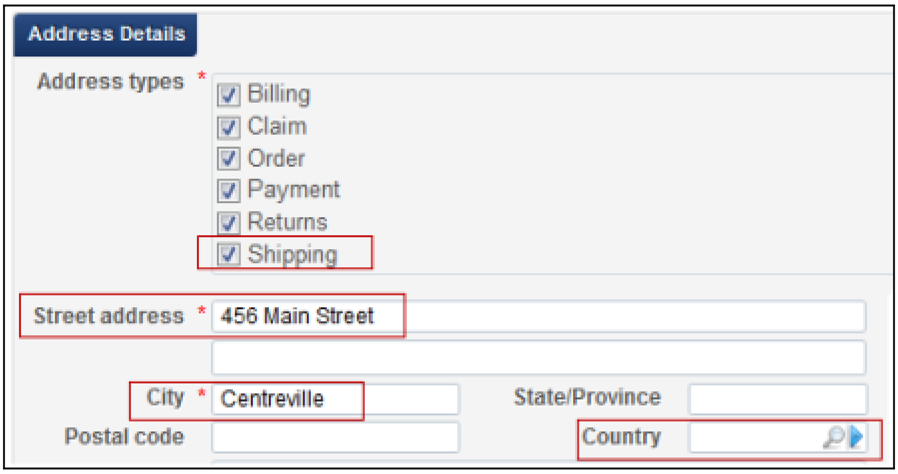


Figure 129: Vendor Address Details Page

PO Line Reference	Expected Receiving Date	Expected Receipt after Ordering Interval
POL-7416		5

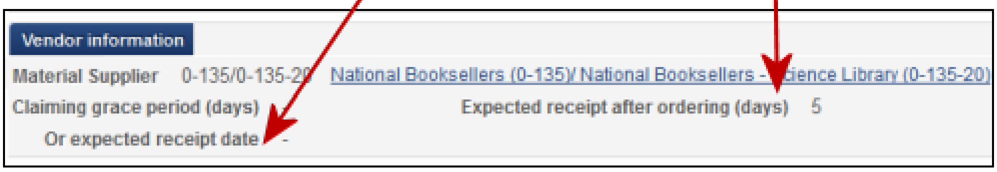


Figure 130: Alma PO Line Page – Vendor Information

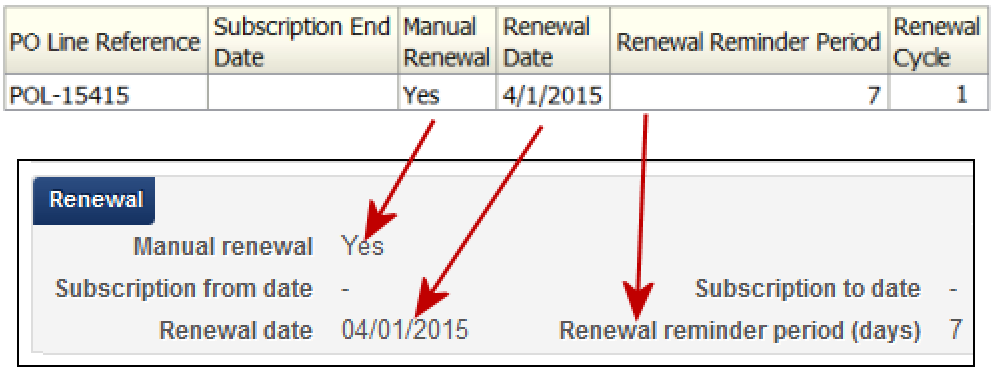


Figure 131: Alma PO Line Page - Renewal Information

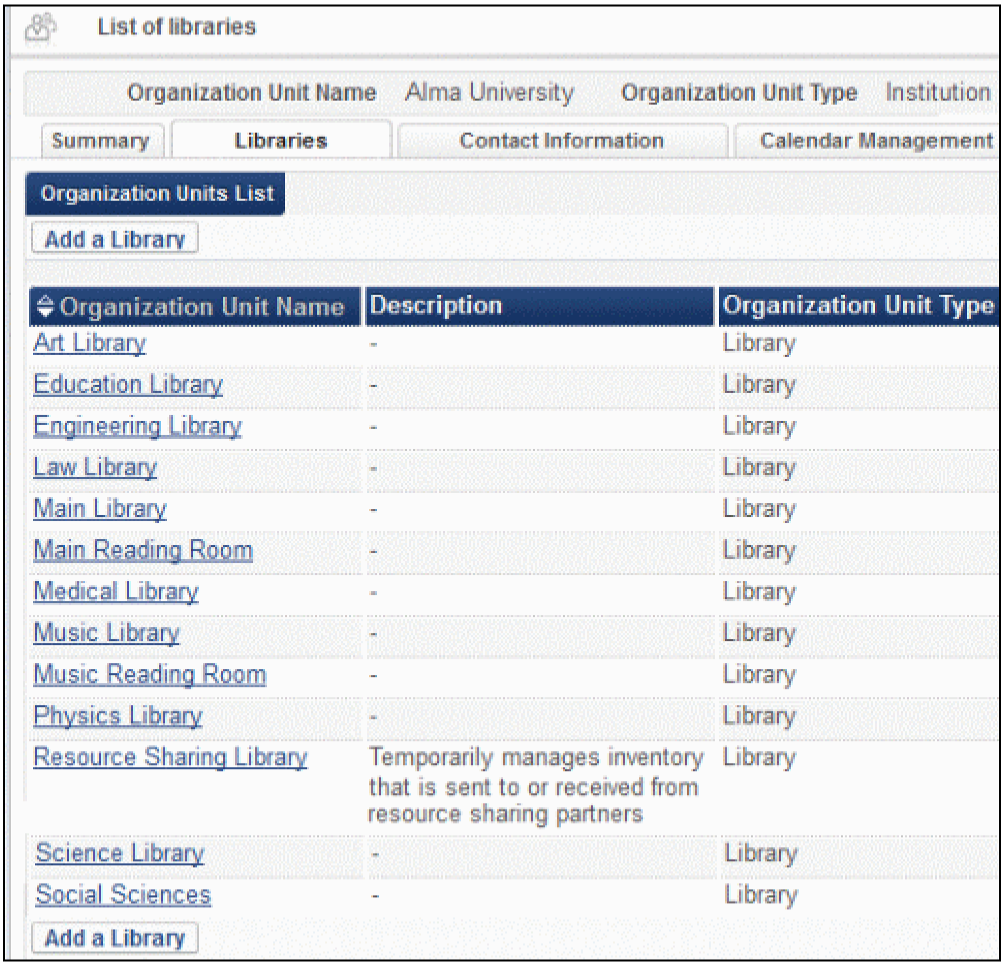
Library Unit

The Library Unit table is a dimension table that stores details about the library in relation to the area that uses it. For example the library unit under the Funds Expenditure SA is the library that manages acquisitions.

Table 7. Library Unit

Field	Description	Additional Information
Library Code	Stores the library code	
Library Description	Stores the library description	
Library Name	Stores the library name	
Unit Type	Store the type of organization unit	Values can be Institution/Library

Below you can find the related pages in Alma for reference (**General Configuration > Configuration Menu > Libraries > Add a Library** or **Edit library information**).



Organization Unit Name	Description	Organization Unit Type
Art Library	-	Library
Education Library	-	Library
Engineering Library	-	Library
Law Library	-	Library
Main Library	-	Library
Main Reading Room	-	Library
Medical Library	-	Library
Music Library	-	Library
Music Reading Room	-	Library
Physics Library	-	Library
Resource Sharing Library	Temporarily manages inventory that is sent to or received from resource sharing partners	Library
Science Library	-	Library
Social Sciences	-	Library

Figure 132: List of Libraries

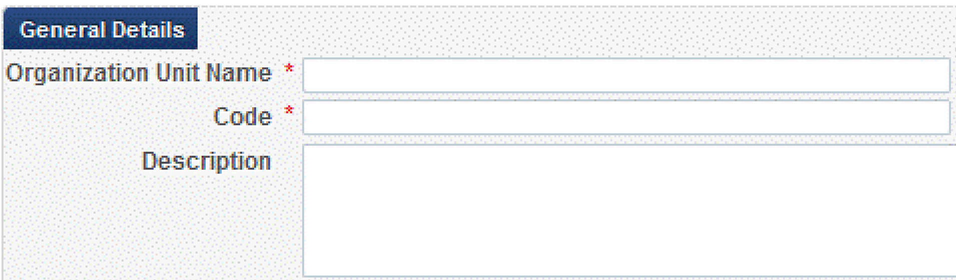


Figure 133: Add a Library

LC Classifications

Each book has a call number that consists of letters, whole numbers, and sometimes a decimal number. Each call number is arranged into at least two lines. The first line is referred to as the top line. The second line always begins directly after the cutter symbol. A cutter symbol is a period followed by a letter.

Alma takes LC classification information from the holdings level. Alma stores four levels in the LC classification dimension. For example:

- PS American literature
  - PS501-689 Collections of American literature
    - PS537-574 By region
      - PS538-549 North

This is presented in Alma Analytics as follows:

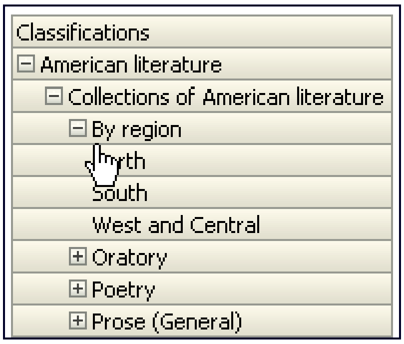


Figure 134: LC Classifications

Each level is referred to by a numbered group (Group1, Group2, Group3, and Group4).

Using this dimension, the user can drill down from Group1 to Group4. In each level, the user can see measures accumulated to the relevant group.

Table 8. LC Classifications

Field	Description	Additional information
Start Range	Stores the start range of the group such as PS501	
End Range	Stores the end range of the group such as PS689	
Classification Code	Stores the letters in the beginning of the range such as PS	

Table 8. LC Classifications

Field	Description	Additional information
Start Range Number	Stores the numbers that come after the letter in the start range	
End Range Number	Stores the numbers that come after the letter in the end range	
Group1	Stores the name of the first level	
Group2	Stores the name of the second level	
Group3	Stores the name of the third level	
Group4	Stores the name of the fourth level	
Classifications	Stores the Hierarchy column that allows the user to drill down from the first level of the classification to the fourth level. Using this column provides the user with the option to view the accumulative measures	

Dewey Classification

Books can be classified with Dewey Classification. In Dewey Classification, topics are ordered in a hierarchy that is indicated by a three digit number. The highest level of the hierarchy is indicated by a number with one significant digit followed by two zeros, such as 600. The second level in the hierarchy is indicated by a number with two significant digits followed by one zero, such as 630. The third level in the hierarchy is indicated by a number with three significant digits such as 636.

For example:

- 600 Technology
    - 630 Agriculture and related technologies
        - 636 Animal husbandry

This is displayed in Alma Analytics as follows:

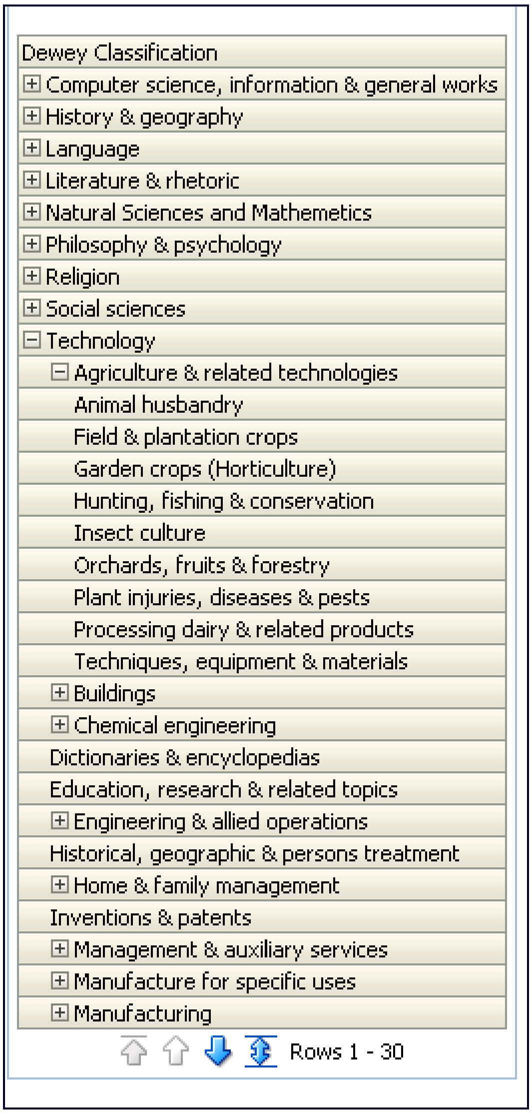


Figure 135: Dewey Classification

Each level is referred to by a numbered group (Group1, Group2, and Group3).

Using this dimension, the user may drill down from Group1 to Group3. In each level, the user may see measures accumulated to the relevant group.

Alma takes Dewey Classification information from the holdings level.

Table 9. Dewey Classification

Field	Description	Additional information
Dewey Number	Holds the first 3 digits of the Dewey Classification.	

Table 9. Dewey Classification

Field	Description	Additional information
Group1	Stores the name of the first level.	
Group2	Stores the name of the second level.	
Group3	Stores the name of the third level.	
Dewey Classifications	Stores the Hierarchy column that allows the user to drill down from the first level of the Dewey Classification to the third level. Using this column provides the user with the option to view the accumulative measures (loans or returns) in each level of the hierarchy.	

User Details

The User Details table is a shared dimension table that stores the details about users. For example, in the fulfillment subject area there is a dimension for the users that loaned the item, the staff users that made the loan, and the staff users that returned the item.

The following chapter describes the fields available in this shared dimension.

NOTES:

Academic institutions store information about individuals, including personal details and information about their activities. Due to privacy concerns, such data must be anonymized on a regular basis.

Alma offers the option to delete such user information for fulfillment and resource sharing activities. The information is deleted for activities that have been completed, such as completed loans or resource sharing borrowing requests.

You can configure Alma to delete the more specific information (for example, User ID) and retain the more general user information (for example, User Group and Job Title).

The information not anonymized can be included in analytics reports.

For more information concerning anonymization, see the **Configuring Fulfillment Jobs** section of the *Alma Fulfillment Guide*.

Table 10. User Details

Field	Description	Additional information
User ID	Stores the unique ID of the user	
Primary identifier		See the field location in Alma in figure 1 below
User Name	Stores the user name that the user uses in order to log in to Alma	
User Type	Stores the values Internal, Internal with external authentication, or External.	■ Internal - An internal user is one whose core user details are managed within the system such as user name, password, contact information, and so forth. ■ Internal with external authentication - like Internal type except that the user name and password are managed externally. ■ External - An external user is one whose core user details are managed by a student information system. See the field location in Alma in **Figure 136**
User Group	Stores the group with which the user is associated such as Faculty, Graduate, or Student	See the field location in Alma in **Figure 136**
User Record Type	Indicates if the user is a Public User or a Staff User	See the field location in Alma in **Figure 136**
First Name	Stores the user's first name	See the field location in Alma in **Figure 136**
Last Name	Stores the user's last name	See the field location in Alma in **Figure 136**
Middle Name	Stores the middle name of the user	See the field location in Alma in **Figure 136**
Job Description	Stores free-form text that describes the function of the user in the library	See the field location in Alma in **Figure 136**

Table 10. User Details

Field	Description	Additional information
Job Title	Stores the job category definition to which the user belongs based on the Job Categories code table	See the field location in Alma in **Figure 136**
Gender	Stores male or female	See the field location in Alma in **Figure 136**
Birth Date	Stores the birth date of the user	Note that in cases there is not date in Alma, date is sometimes shown as a defaults of 1/1/1970. this is planned to be fix in a future release. See the field location in Alma in **Figure 136**
Campus Code	Stores the campus code of the user	See the field location in Alma in **Figure 136**
Status Date	Stores the date on which the patron was registered in the university	See the field location in Alma in **Figure 136**
Status	Indicates if the user is active	See the field location in Alma in **Figure 136**
Creation Date	Stores the date that the user was created in the system	See the field location in Alma in **Figure 137**
Modified By	Stores the name of the user that modified the user record	See the field location in Alma in **Figure 137**
Modification Date	Stores the date of the modification of the user record	See the field location in Alma in **Figure 137**
Expiry Date	Stores the date on which the user is to expire and no longer be able to get service from the system	See the field location in Alma in **Figure 137**
Locked Out Date	Indicates the date on which the user is locked out. A user is locked out if he tries to access the Alma system several times with incorrect credentials.	

Table 10. User Details

Field	Description	Additional information
Purge Date	Stores the date on which the user record is to be deleted from Alma	Note that in cases there is not date in Alma, date is sometimes shown as a defaults of 1/1/1970. this is planned to be fix in a future release. See the field location in Alma in **Figure 137**
Default Language	Stores the default language of the user	See the field location in Alma in **Figure 137**
Failed Authentication	Stores the number of times that the user tried to access Alma with an incorrect password	
Creator	Stores the user name of the user that created the user in the system	See the field location in Alma in **Figure 137**
External ID	Stores the ID of the user in the originating system	
Identifier 1	Stores identifier 1. The identifier field allows you to enrich the user details exported to Analytics with additional identifiers. Choosing a specific identifier to be included in the user details is done in Alma (in a table that is currently restricted to Ex Libris staff). For assistance in defining this field, contact Ex Libris Support.	
Identifier 2	Stores identifier 2. See details in "identifier 1" above.	
Statistical Catagories 1-5	These fields allow you to map five statistical categories. This allows you to filter reports based on advanced user information typically stored in the statistical category fields.	
Resource Sharing Library Code	The code of the resource sharing library assigned to the user.	
Resource Sharing Library	The resource sharing library assigned to the user.	

VIDEO:

For a video describing the Statistical Catagories fields, see the *Analytics: User Statistical Categories* video.

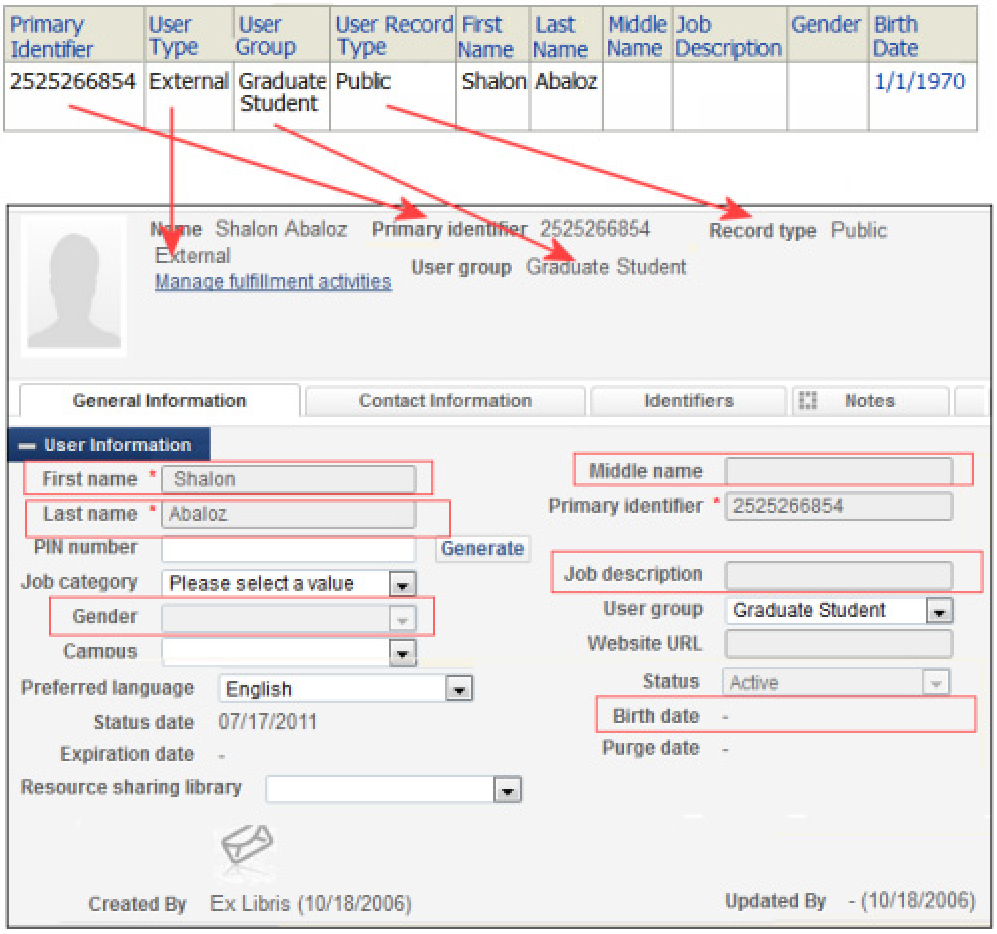


Figure 136: Alma User Details Page – General Information

Primary Identifier	Default Language	Status Date	Creation Date	Modified By	Modification Date	Expiry Date	Purge Date
2525107216	English	7/17/2011	10/18/2006		10/18/2006		1/1/1970

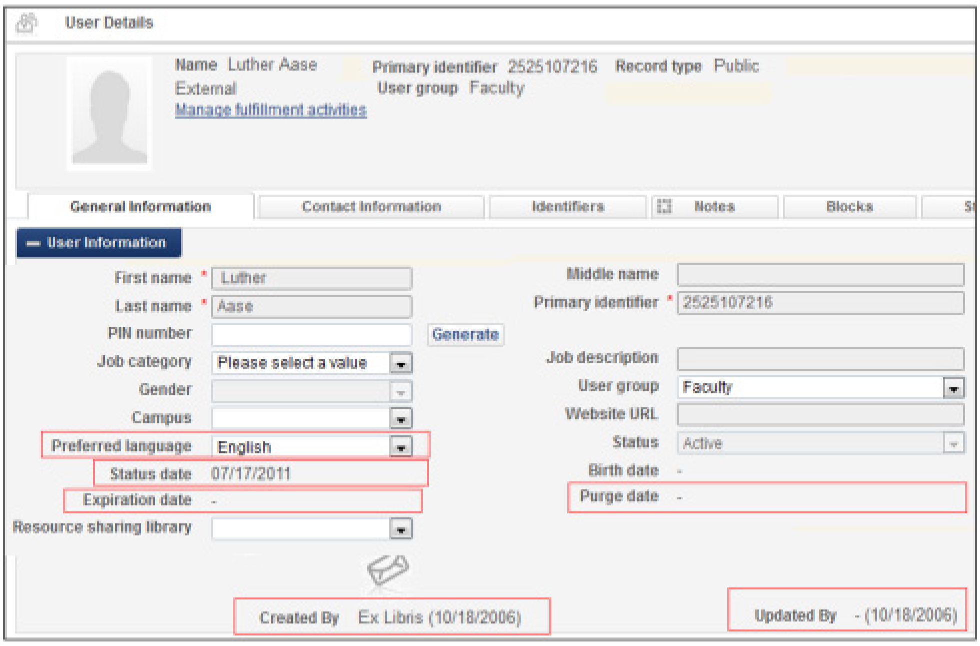


Figure 137: Alma User Details Page – General Information

Configuring Statistical Categories to Be Displayed in Alma Analytics

Alma allows you to label users according to statistical categories, which can be grouped into category types. (For more information on configuring statistical categories and category types, see **Configuring Statistical Categories** on page **160**the **Configuring Statistical Categories**, **Configuring Category Types**, and **Configuring Statistical Categories/Types** sections of the *Alma Administration Guide*.)

You can configure Analytics to display the statistical categories of a type in reports.

To configure category types:

1 From the main menu, open the Analytics User Statistics page (**Administration > Analytics > Configuration Menu > Analytics User Statistics**). The following page opens:

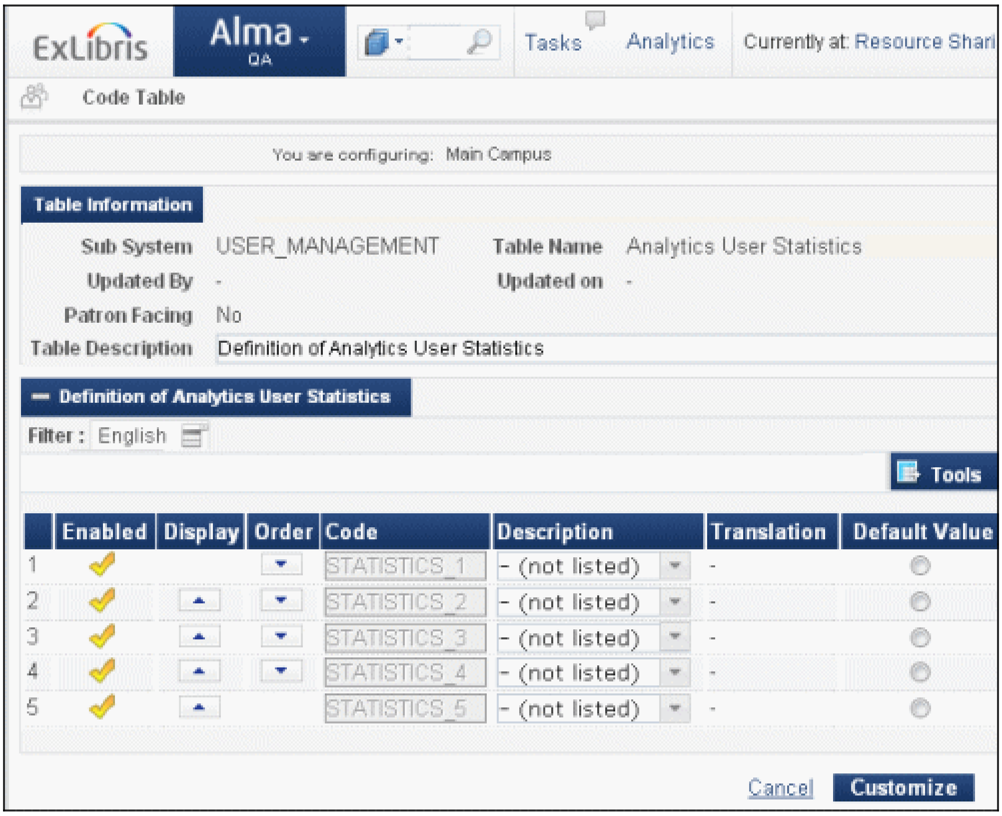


Figure 138: Analytics User Statistics

2 For each statistic field, select from the **Description** drop-down list the statistical type that you want to map to that field.

3 Click **Customize**.

The statistical categories of the type you mapped are displayed in reports that include the field.

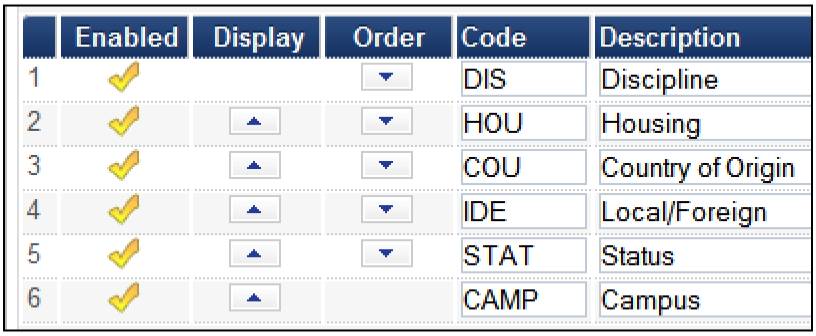
Example of Configuring Statistical Categories to Be Displayed in Alma Analytics

The procedure to configure statistical categories to be displayed in Alma analytics consists of the following steps:

1. Configure category types. These are groups under which you place statistical categories. Examples of category types are Housing, Country of Origin, and Status.
2. Configure statistical categories. These are items that are groups under category types. Examples of statistical categories are Dormitory, Canada, and Paid.
3. Place the statistical categories under category types. For example, Dormitory under Housing, Canada under Country of Origin, and Paid under Status.
4. Link a statistical type to one of the statistics fields in analytics.

The following is an example of how to configure Statistical Categories/Types to be displayed in Alma analytics.

1. From the Category Types Configuration page (**Administration > User Management Configuration > Configuration Menu > User Details > Category Types**), configure several category types (For more information, see the **Configuring Category Types** section of the *Alma Administration Guide*.) For example:
   - Discipline
   - Housing
   - Country of Origin
   - Local/Foreign
   - Status
   - Campus



	Enabled	Display	Order	Code	Description
1				DIS	Discipline
2				HOU	Housing
3				COU	Country of Origin
4				IDE	Local/Foreign
5				STAT	Status
6				CAMP	Campus

Figure 139: Category Types

2. From the Statistical Categories configuration page (**Administration > User Management Configuration > Configuration Menu > User Details > Statistical Categories**), configure several statistical categories. (For more information, see the **Configuring Statistical Categories** section of the *Alma Administration Guide*.) For example:

1	SOC	Social Sciences	Social Sciences
2	PSY	Psychology	Psychology
3	HIS	History	History
4	LING	Linguistics	Linguistics
5	PHIL	Philosophy	Philosophy
6	BIO	Biology	Biology
7	CHEM	Chemistry	Chemistry
8	COMP	Computer Scienc	Computer Science
9	PHY	Physics	Physics
10	LIT	Literature	Literature
11	FOR	Foreign Students	Foreign Students
12	LOC	Local Students	Local Students
13	STU	Student Dorms	Student Dorms
14	PRIV	Private Housing	Private Housing
15	GER	Germany	Germany
16	UKR	Ukraine	Ukraine
17	TUR	Turkey	Turkey
18	CAN	Canada	Canada
19	CHI	China	China
20	AUS	Australia	Australia
21	ONC	On Campus	On Campus
22	OFC	Off Campus	Off Campus
23	PAID	Paid	Paid
24	NPAID	Not Paid	Not Paid

Figure 140: Statistical Categories

3 From the Statistical Categories/Types Configuration page (**Administration > User Management Configuration > Configuration Menu > User Details > Statistical Categories/Types**), place statistical categories under category types. (For more information, see **Configuring Statistical Categories/Types** on page **165****Configuring Statistical Categories/Types** section of the *Alma Administration Guide*.) For example:

1	✓	Australia	Country of Origin
2	✓	Biology	Discipline
3	✓	Canada	Country of Origin
4	✓	Chemistry	Discipline
5	✓	China	Country of Origin
6	✓	Off Campus	Campus
7	✓	On Campus	Campus
8	✓	Paid	Status
9	✓	Not Paid	Status
10	✓	Computer Science	Discipline
11	✓	Foreign Students	Local/Foreign
12	✓	Germany	Country of Origin
13	✓	History	Discipline
14	✓	Linguistics	Discipline
15	✓	Local Students	Local/Foreign
16	✓	Nigeria	Country of Origin
17	✓	Philosophy	Discipline
18	✓	Physics	Discipline
19	✓	Private Housing	Housing
20	✓	Psychology	Discipline
21	✓	Social Sciences	Discipline
22	✓	Student Dorms	Housing
23	✓	Turkey	Country of Origin
24	✓	Ukraine	Country of Origin

Figure 141: Statistical Categories/Types

4 From the Analytics User Statistics Configuration page (**Administration > Analytics > Configuration Menu > Analytics User Statistics**) link a statistical type to one of the statistics fields. (For more information, see **Configuring Statistical Categories to Be Displayed in Alma Analytics** on page 135.)

When creating a report with the statistics field you configured, the statistical categories of that type are displayed in the report.

9

Funds Expenditure

Using the Funds Expenditure subject area, the Design Analytics user may create reports and dashboards that help to answer the following types of business questions:

- How much was expended last year per month?
- What is the comparison of encumbrances versus expenditures versus allocations?
- How much was expended per item material type or per item type?
- What is the share of E/P expenditures out of the total expenditures?
- How much was paid per vendor?
- How much was expended per reporting code?
- How much was expended per fund, ledger, or library out of the allocations?
- How much was expended per library?

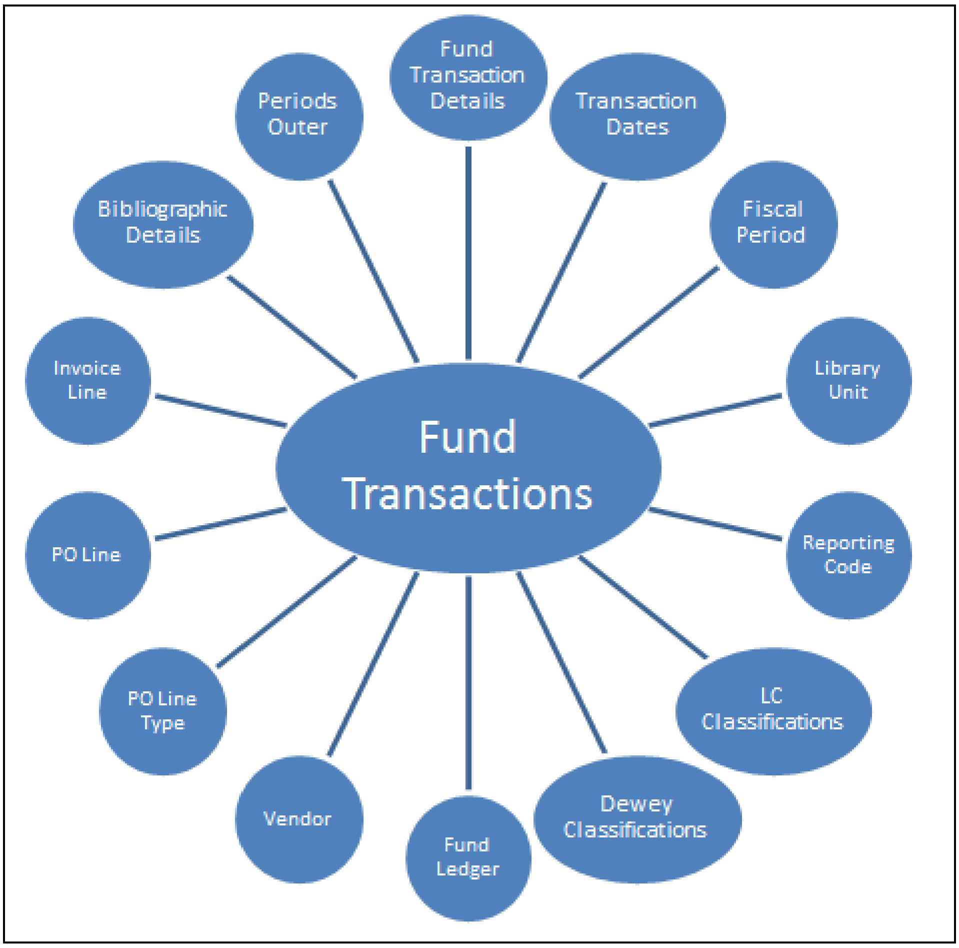


Figure 142: Star Diagram – Funds Expenditure

Field Descriptions

The following lists the fields available in Funds Expenditure.

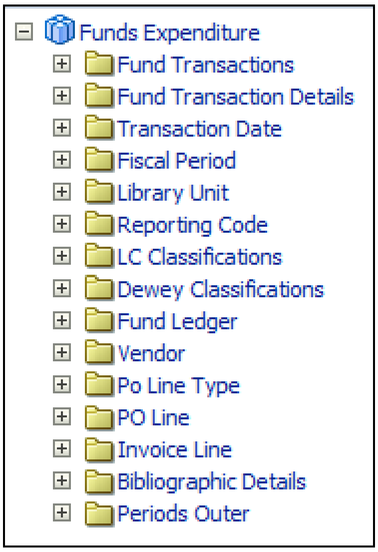


Figure 143: Funds Expenditure – Field Descriptions

Fund Transactions

The Fund Transactions table is the fact table that stores all the measures (activities) of specific transactions. There are three types of transactions:

- expenditure
- allocation
- encumbrance

Each transaction is associated with a fund and each fund is associated with a fiscal period:

- The allocation transaction is made on the fund level and is used to allocate budgets to a fund
- The encumbrance transaction is created from the PO line. Another transaction with negative amounts is made after the invoice line is created. In a common scenario, the encumbrance amount is zero after the invoice arrives. Sometimes there are differences in the amounts between the two transactions, so that the remaining encumbrance amount is not always zero.
- The expenditure transaction is created from the invoice line and represents the actual payment for the item

Report Creation Tips

- **Creating a report based on expenditures**

  Because of the way encumbrance transactions are created (with a plus and minus transaction), when building a report on the transaction level, it is common to use the transaction type = "expenditure" filter. Many of the OTB reports are built this way.

- **Creating a report with a column per transaction type**

  Since there is one transaction amount measure in analytics, to create a report with a column per transaction type, do the following:

1. Add three transaction amount columns and create a filter on each column. The figure below is an example of a filter for an encumbrance column.

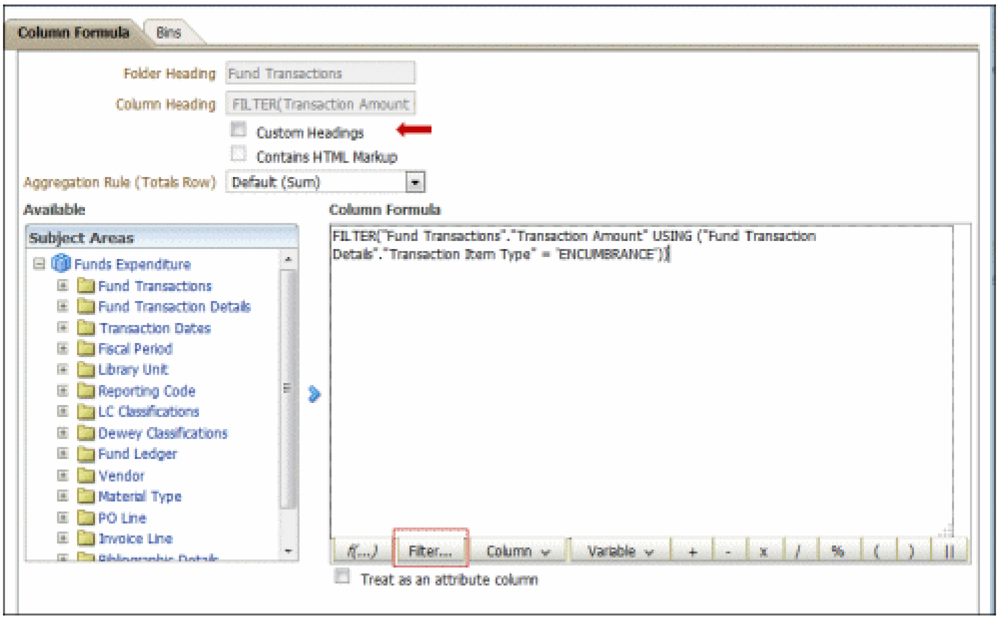


Figure 144: Filter for an Encumbrance Column

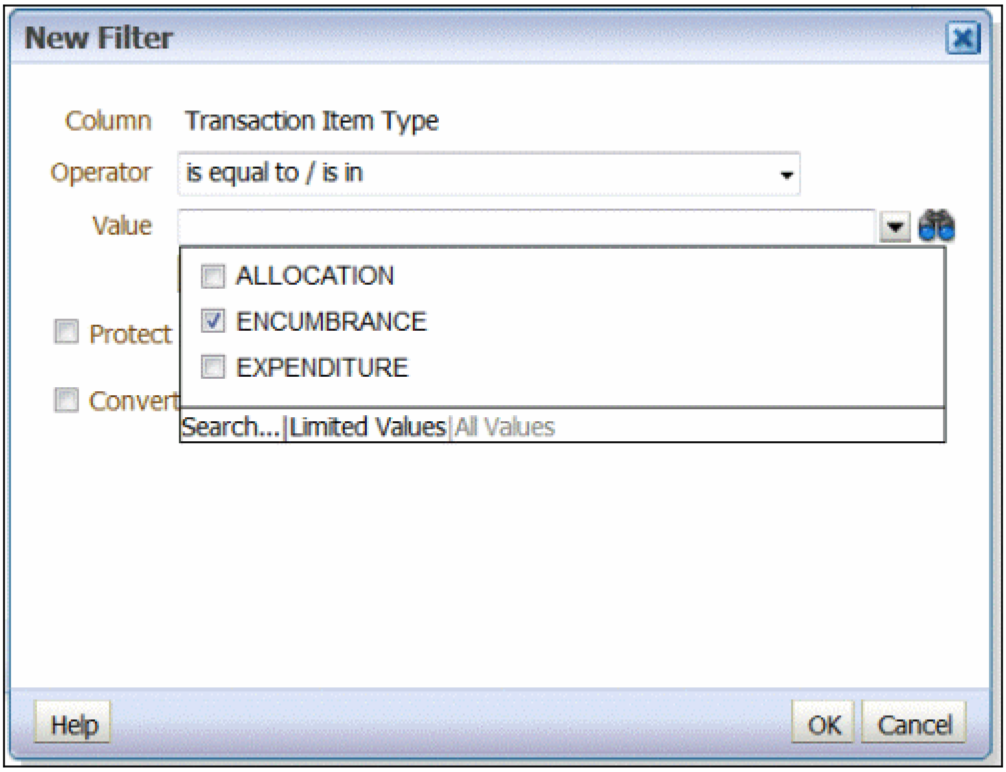


Figure 145: Encumberance Filter

2 Repeat this step for the allocation and expenditure columns.

3 Select the **Custom Headings** checkbox to change the caption of the column

- **Combining invoice and PO amounts in reports**

  The fact that in the same SA there are amounts from the transaction level as well as amounts from the PO and invoice level can create duplications when combined together. To ensure that you get correct results in your reports, follow the below guidelines:

  - When adding the PO Line Total Price field, also add the PO Line Reference field to your report columns. (It can be excluded from display, but it has to be selected.)
  - When adding the Invoice Line Total Price field, also add the Unique Invoice Line Identifier field to your report columns. (It can be excluded from display, but it has to be selected.)

The following is an example of the invoice line amount in Alma:

Figure 146: Invoice Line Amount

If you create a report with invoice line amounts as well as amounts from the transaction level (in this example the remaining encumbrance) you get incorrect results:

PO Line Reference	PO Line Total Price	Remaining Encumbrance	Invoice Line Total Price
POL-60702	80.85	55.29	25.56

Figure 147: Invoice Line Total Price – Incorrect

If you add the invoice number, the results are correct:

PO Line Reference	Invoice Number	PO Line Total Price	Remaining Encumbrance	Invoice Line Total Price
POL-60702	VISA 26 DEC 13-29	80.85	4.18	76.67
		80.85		

Figure 148: Invoice Line Total Price – Correct

The following table describes the fields in the Funds Expenditure subject area.

Table 11. Fund Transactions

Field	Description	Additional Information
Transaction Amount	Stores the transaction amount	Typically you filter the report to show amount per transaction type.
Transaction VAT	Stores the value-added tax	
PO Line Quantity	Stores the number of items in the PO line.	You must add the PO Line Reference field to the report to ensure that the PO Line Quantity is calculated correctly.

Table 11. Fund Transactions

Field	Description	Additional Information
PO Line Total Price	Stores the total price (includes additional charges, if any).	Add the PO Line Reference field to the report to ensure that the PO Line Total Price is calculated correctly.
PO Line Pct	Stores 100 times the Transaction Amount/PO Line Total Price	
Invoice Line Quantity	Stores the number of elements ordered in the invoice line.	
Invoice Line Total Price	Stores the total amount (includes additional charges, if any).	Add the Unique Invoice Line Identifier field to the report to ensure that the Invoice Line Total Price is calculated correctly.
Invoice Line Pct	Stores 100 times the Transaction Amount / Invoice Line Total Price	

Fund Transactions Details

The Fund Transactions Details table is the dimension table that stores more details about specific transactions. The primary key is FUND_TRANSACTION_ID.

Table 12. Fund Transactions Details

Field	Description	Additional Information
Transaction ID	The ID of the transaction	
Transaction Date	Stores the date that the transaction occurred	
LC Classification Code	Stores the LC classification code, the letters with which the LC class number starts such as BF or QA	

Table 12. Fund Transactions Details

Field	Description	Additional Information
LC Classification Number	Stores the LC classification number, that is, the numbers followed by the letters until the first period followed by a letter	
LC Classification Top Line	Stores the combined LC code and classification numbers until the first period followed by a letter, such as NB933 when the lc_class_number is NB933.F44.	
Dewey Classification Top Line	Store the first 3 digits of the Dewey Classification	
Transaction Item Type	Stores expenditures, allocations, or encumbrances	
Transaction Item Sub Type	Displays whether the Allocation Transaction Item Type is actually Transfer and whether the Encumbrances Transaction Item Type is actually Disencumberance.	
Fund Transaction Reference	The fund transaction reference number.	
Exchange Rate	The exchange rate between the fund's currency and that of the invoice.	
Exchange Rate Date	The date that the exchange rate was calculated.	
Explicit Ratio	A set exchange rate between the fund's currency and that of the invoice.	
Source Amount	The amount of the source currency.	
Source Currency	The currency from which you want to convert the invoice currency.	

Transaction Dates

Since each transaction is associated with a fund and each fund is associated with a specific fiscal period, this date dimension includes a logic that changes the actual dates if they do not fall into the fiscal year assigned to the fund according to the following logic:

- If the transaction date is greater than the fund end fiscal date, the transaction date is set to the fund end fiscal date
- If the transaction date is less than the fund start fiscal date, the transaction date is set to the fund start fiscal date

VIDEO:
For more information about improvements made to the date fields, see the *Analytics: Date Fields Improvements* video (4:27 mins).

Table 13. Transaction Dates

Field	Description	Additional Information
Transaction Date Month Key	Stores the month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.
Transaction Date Month	Stores the month of the date in month description format such as February	
Transaction Date Full Month	Stores the month and the year of the date in a display format such as Feb 12	This field is useful when comparing data on a month basis between years.
Transaction Date Quarter	Stores the quarter of the date in a display format such as Q1	
Transaction Date Year	Stores the year of the date in number format such as 2012	
Transaction Date Fiscal Month	Stores the fiscal month of the date in a number format such as 9 for September	

Table 13. Transaction Dates

Field	Description	Additional Information
Transaction Date Fiscal Year	Stores the fiscal year of the date in a string format such as 2012.	If the fiscal year description is stored in the institution fiscal period configuration table, this value is taken from there.
Transaction Date Fiscal Year Desc	Stores the fiscal year of the date in string format such as 2012.	If the fiscal year description is stored in the institution fiscal period configuration table, this value is taken from there.
Fiscal Full Quarter Desc (to be deprecated)	Stores the fiscal quarter and the fiscal year of the date in a display format such as Q3/2012	This field will be deleted in a future release.
Fiscal Full Quarter Key (to be deprecated)	Stores the fiscal year and the quarter of the date in a number format such as 2012,3	This field will be deleted in a future release.
Fiscal Quarter Desc (to be deprecated)	Stores the fiscal quarter of the date in a display format such as Q3	This field will be deleted in a future release.
Fiscal Quarter Key (to be deprecated)	Stores the fiscal quarter of the date in a number format such as 3	This field will be deleted in a future release.
Fiscal Full Month key (to be deprecated)	Stores the fiscal year and the month of the date in a number format such as 201,209 (fiscal year 2012)	This field will be deleted in a future release.
Full Quarter Key (to be deprecated)	Stores the year and the quarter of the date in a number format such as 20,121 (the first quarter of 2012)	This field will be deleted in a future release.
Full Quarter Desc (to be deprecated)	Stores the year and the quarter of the date in a display format such as Q1/2012	This field will be deleted in a future release.
Quarter Key (to be deprecated)	Stores the quarter of the date in a number format such as 1	This field will be deleted in a future release.
Year Key (to be deprecated)	Stores the year of the date in number format such as 2012	This field will be deleted in a future release.

Table 13. Transaction Dates

Field	Description	Additional Information
Transaction Date	Stores the transaction date in a date format such as 2/29/2014.	

Fiscal Period

The Fiscal Period table is a dimension table that stores details about the fiscal periods defined for the institution.

Details are taken from the FundLedgerFiscalPeriodTable Mapping Table.

Table 14. Fiscal Period

Field	Description	Additional Information
Fiscal Period Start Date	Stores the start date of the fiscal period of the institution	
Fiscal Period End Date	Stores the end date of the fiscal period of the institution	
Fiscal Period Description	Stores the description of the fiscal period as stored in the FundLedgerFiscalPeriodTable mapping table or stores the fiscal year if the description is empty	
Fiscal Period Status	Stores the status of the fiscal period such as Active, Inactive, Draft, or Close	

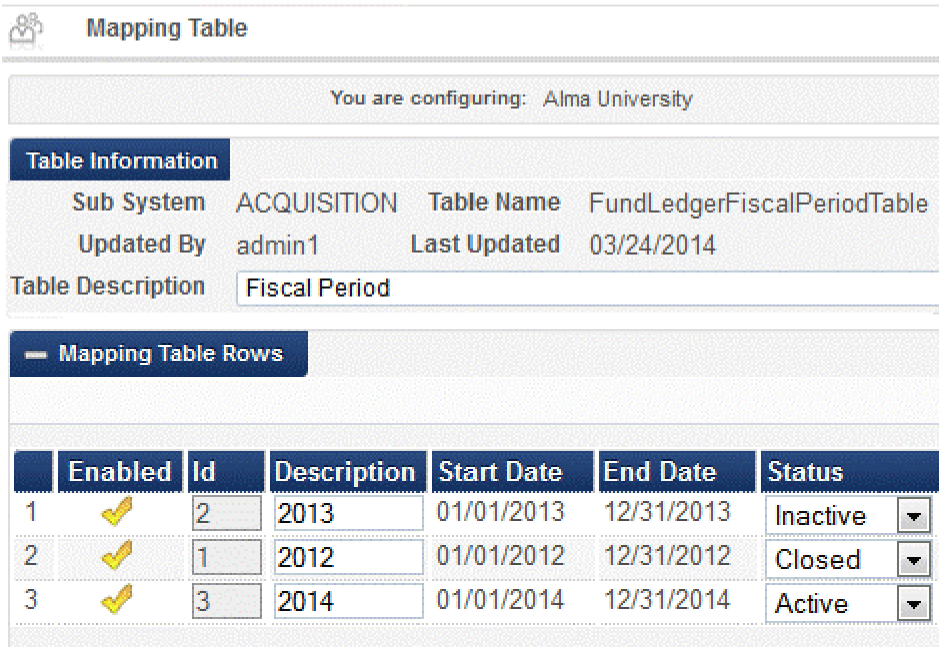


Figure 149: Acquisitions Configuration - Fund and Ledger Fiscal Period

Library Unit

The Library Unit table is a dimension table that stores details about the library that manages acquisitions.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Reporting Code

The Reporting Code table is a dimension table that stores details about the reporting code and transactions where it is used. The primary key of the table is CODE.

Each institution may categorize transactions in different ways. Usually this will be done by applying a unique reporting code.

Table 15. Reporting Code

Field	Description	Additional Information
Code	Stores the reporting code that is used.	

Table 15. Reporting Code

Field	Description	Additional Information
Description	Stores the description of the reporting code	

LC Classifications

Users may view measures accumulated to the relevant group, including expenditures, encumbrances, and allocations grouped by classifications.

NOTE:
The field descriptions can be found in the LC Classification shared dimension. For more information, see **LC Classifications** on page **127**.

Dewey Classification

Users can view measures accumulated to the relevant group, including expenditures, encumbrances, and allocations grouped by classifications.

NOTE:
The field descriptions can be found in the Dewey Classification shared dimension. For more information, see **Dewey Classification** on page **128**.

Fund Ledger

The Fund Ledger table is a dimension table that stores the details about the fund with which the transaction is associated. The primary key of the table is FUND_LEDGER_ID.

There are the following types of funds:

- Ledger
- Summary
- Allocated Fund

Funds are kept in a parent-child relationship so that each fund has a connection to its parent.

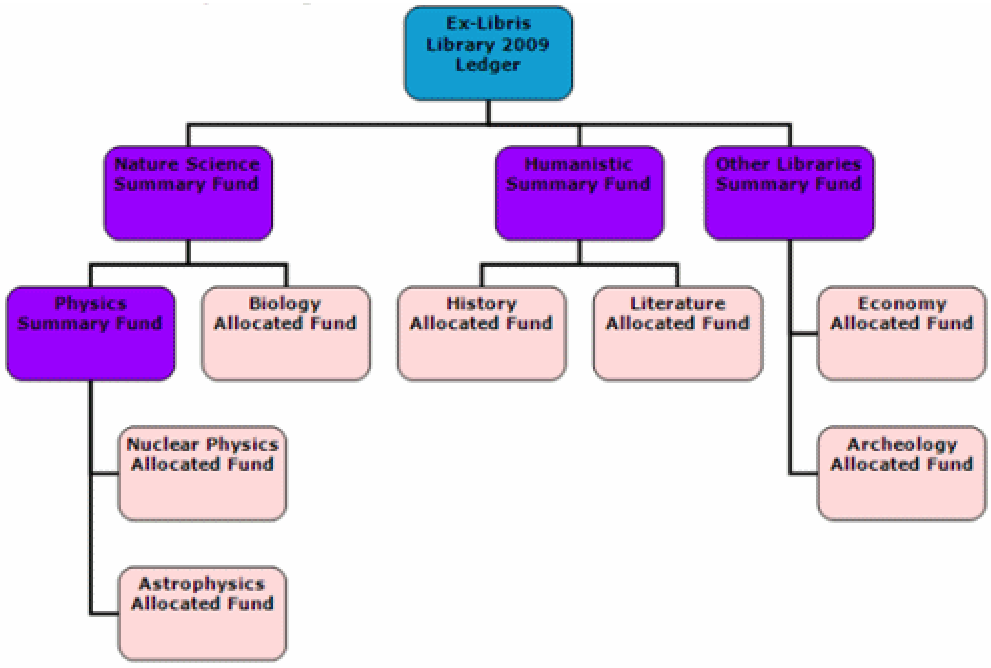


Figure 150: Funds Hierarchy Example

Creating Reports According to Fund Type

You can create reports according to fund type. If the procedures in this section are not implemented, the sums of all of the fund types may be added together in the transaction amount.

- To create a report displaying funds of just one type, filter the Fund Type column according to Ledger, Allocated fund, or Summary fund:

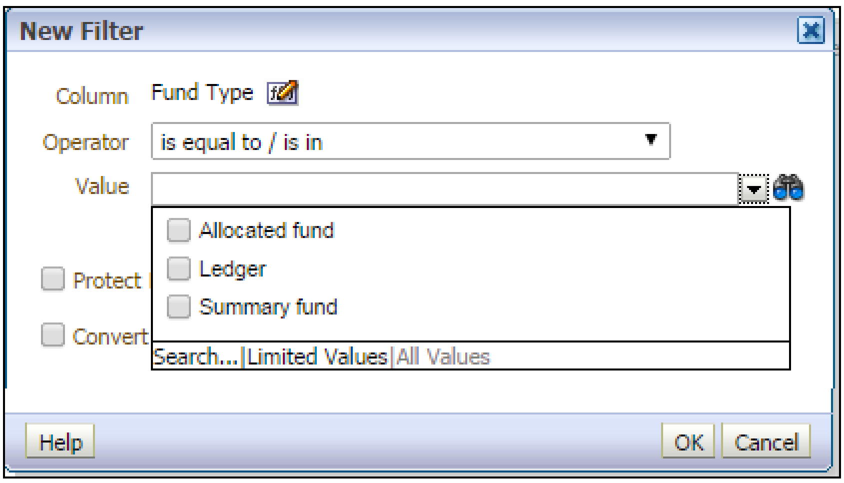
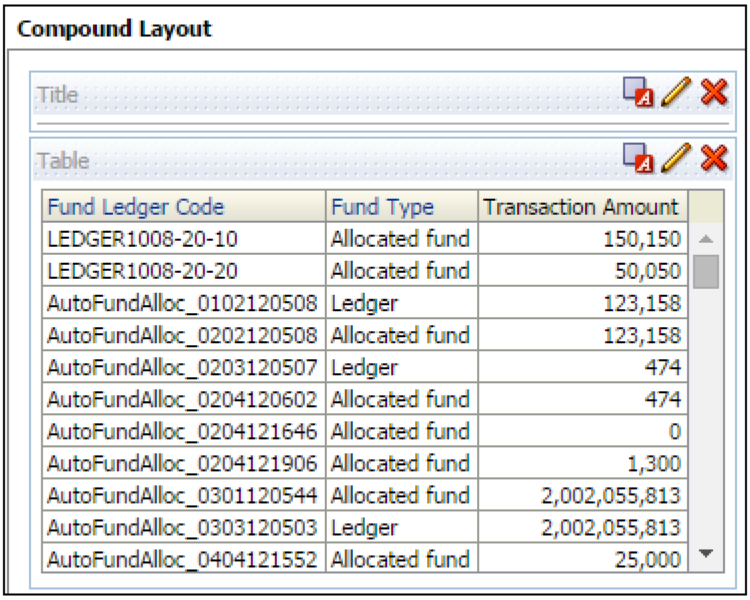


Figure 151: Filter By Fund

- To create a report showing all of the fund types, add a column that displays any unique identifier of the fund, such as Fund Ledger Code:



Fund Ledger Code	Fund Type	Transaction Amount
LEDGER1008-20-10	Allocated fund	150,150
LEDGER1008-20-20	Allocated fund	50,050
AutoFundAlloc_0102120508	Ledger	123,158
AutoFundAlloc_0202120508	Allocated fund	123,158
AutoFundAlloc_0203120507	Ledger	474
AutoFundAlloc_0204120602	Allocated fund	474
AutoFundAlloc_0204121646	Allocated fund	0
AutoFundAlloc_0204121906	Allocated fund	1,300
AutoFundAlloc_0301120544	Allocated fund	2,002,055,813
AutoFundAlloc_0303120503	Ledger	2,002,055,813
AutoFundAlloc_0404121552	Allocated fund	25,000

Figure 152: Fund Ledger Code

Table 16. Fund Ledger

Field	Description	Additional Information
Currency	Stores the fund's currency	
Fund Ledger Code	Stores the fund ledger code unique to each institution and fiscal period	This code is not unique, since each year another entry is made for the same code
Fund Ledger ID	Stores the unique ID of the fund	
Fund Ledger Name	Stores the fund ledger name	
Fund Ledger Status	Indicates if the fund is active or inactive	
Parent Fund Ledger ID	Stores the unique ID of the fund's parent	

Table 16. Fund Ledger

Field	Description	Additional Information
Fund Type	Stores one of the following types: ■ Ledger ■ Summary ■ Allocated	
Fund Area	Stores the following values: Endowed, Gift, General, Grant, Income	This field is named Fund type in Alma and is created via a mapping table. See **Figure 153** and **Figure 154**.
External ID	The fund ID used by an external system.	
Fund Ledger Hierarchy	Stores the Hierarchy column that allows the user to drill down from the ledger to the summary to the specific allocated fund. Using this column provides the user with the option to view the accumulative measures in each level of the hierarchy.	

Fund Ledger Code	Currency	Fund Ledger Id	Fund Ledger Name	Fund Ledger Status	Fund Type	Note	Parent Fund Ledger Name	Fiscal Period Description
LEDGER 1003-10-10	USD	12518190000121	Accounting and Finance E-resources	ACTIVE	Allocated fund	Please be sure to upload the latest attachment from our March meeting.	Accounting and Finance	2012
		657242120000121	Accounting and Finance E-resources	ACTIVE	Allocated fund	Test	Accounting and Finance	2014
		74770990000121	Accounting and Finance E-resources	ACTIVE	Allocated fund	Check for latest attachment	Accounting and Finance	2013

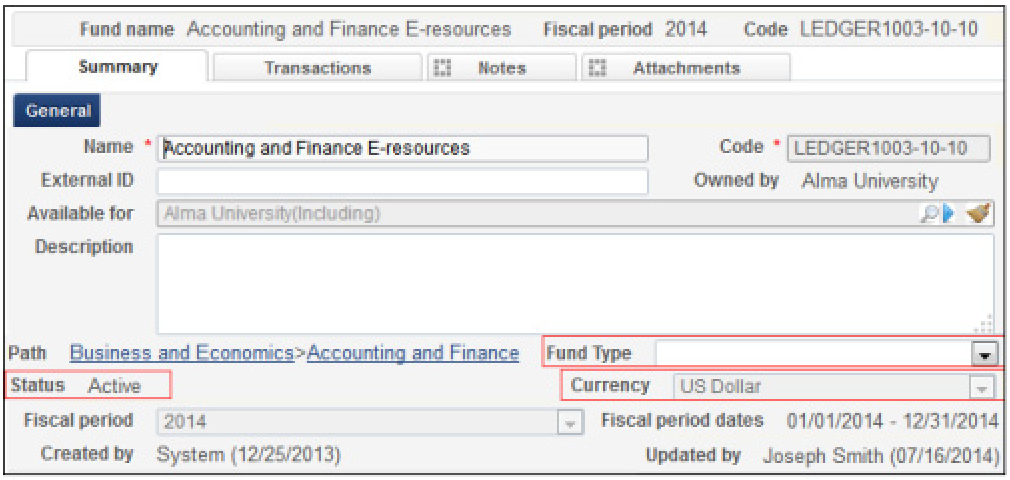


Figure 153: Fund and Ledger- Summary Details

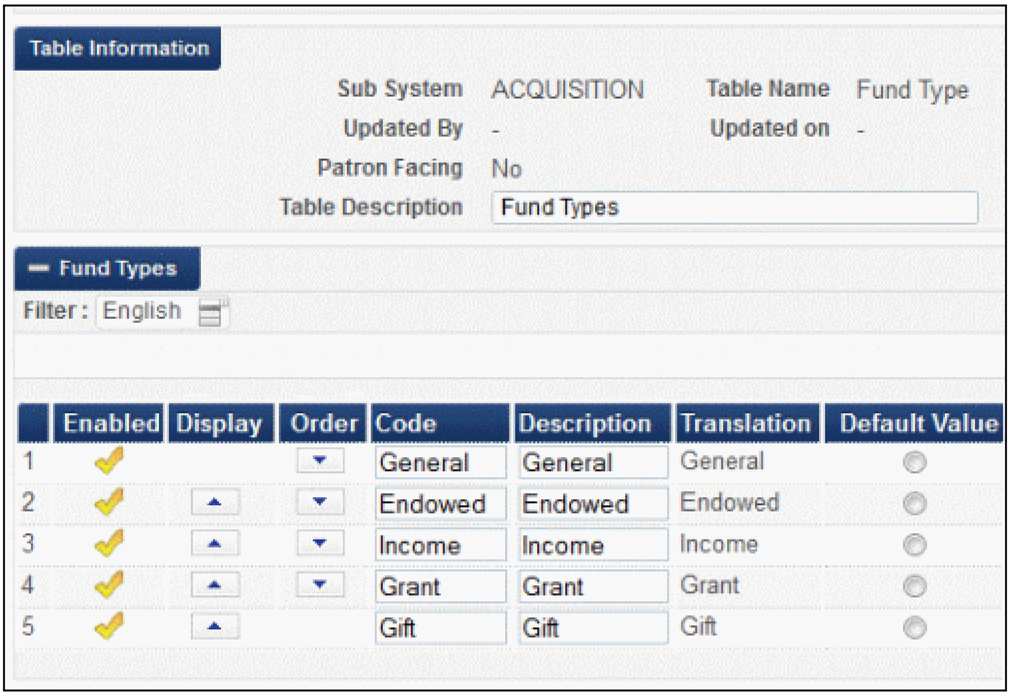


Figure 154: Fund Types

Vendor

The Vendor table is a dimension table that stores details about vendors. The data is taken from the PO Line for transactions of type encumbrance and from Invoice Line for transactions of type expenditure. Transactions of type allocation are not related to any particular vendor; therefore, they return a NULL\unknown value for all vendor fields. Vendors are the expected suppliers of materials ordered by the library.

The primary key of the table is VENDOR_ID.

Table 17. Vendor

Field	Description	Additional Information
Vendor Code	Stores the vendor code unique to the institution	
Vendor Name	Stores the vendor name	
Create Date	The date the vendor was created.	
Modification Date	The date the vendor was modified.	

Table 17. Vendor

Field	Description	Additional Information
Additional Code	A code in addition to the vendor code.	
ERP Code	A code used by an instution's financial system, such as the Enterprise Resource Planning (ERP) system	

PO Line Type

The PO Line Type table is a dimension table that stores details about the PO line type associated with the transaction that determines the type of order created (one time/continuous) and the type of inventory items that is created (Ebook, Ejournal, etc.). The primary key of the table is PO_LINE_TYPE.

Table 18. Material Type

Field	Description	Additional Information
PO Line Type Name	Stores the PO Line Type ID as defined in the alma mapping Table	See the field location in Alma in **Figure 155**.
Acqusition Material Type	Stores the acquisition material type	See the field location in Alma in **Figure 155**.
Format	Stores the inventory format of Electronic or Physical	See the field location in Alma in **Figure 155**.
Continuity	Stores if it is a one-time, continuous, or standing order PO line.	See the field location in Alma in **Figure 155**.

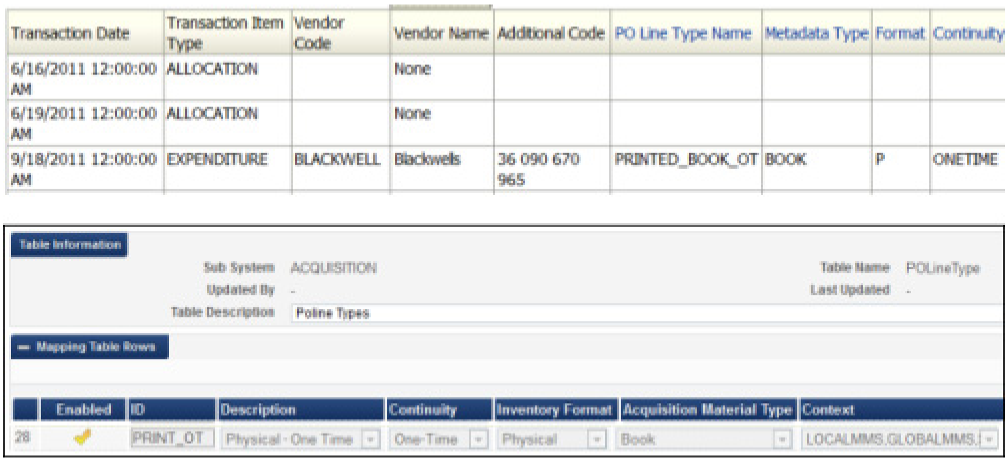


Figure 155: PO Line Types

PO Line

The PO Line table is a shared dimension table that stores details about the PO and the PO Line.

NOTE:

The field descriptions can be found in the PO Line shared dimension. For more information, see **PO Line** on page **115**.

Invoice Line

The Invoice Line table is a dimension table that stores details about the invoice and invoice line associated with the transaction. The encumbrance created by the PO Line is released by the expenditure created by the Invoice. The primary key of the table is INVOICE_LINE_ID.

Table 19. Invoice Line

Field	Description	Additional Information
Status	The status of the invoice line: Ready if the line is valid, In Review otherwise.	See the field location in Alma in **Figure 156**.
Vendor account code	Related vendor account code.	
Vendor account description	Related vendor account.	
Approval Date	Invoice column - the date that the Invoice was approved.	

Table 19. Invoice Line

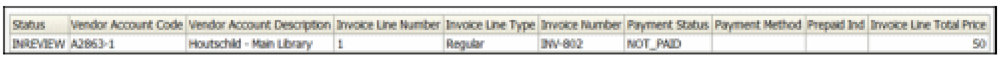
Field	Description	Additional Information
Approval Status	Holds the following values: Pending, Approved, Rejected	
Approved By	ID of the user that approved the Invoice.	
Disapprove Reason	Will be activated if the invoice is disapproved.	Values in Code table InvoiceDisapproveReasons
Invoice Date	The date on the invoice header.	
Invoice Line Number	Identifier for the Invoice line.	
Invoice Line Type	Type of the invoice line.	Code table: InvoiceLineType. **NOTE:** Invoice lines of type Adjustment are not expenditure transactions; therefore, they are not available in reports.
Invoice Number	Number of the invoice	See the field location in Alma in **Figure 157**.
Payment Status	Indicates if the Invoice was paid or not.	See the field location in Alma in **Figure 158**.
Payment Voucher Amount	The amount of the payment voucher	
Payment Voucher Date	The date that the voucher was created	
Payment Voucher Number	Number of the voucher that the invoice was paid by ERP.	
Subscription From Date	For continuous lines: Start date of the subscription.	
Subscription To Date	For continuous lines: End date of the subscription.	
Payment Method	Payment method of the Invoice, (e.g. credit card, cache) Values are in CT: 'PaymentMethod	

Table 19. Invoice Line

Field	Description	Additional Information
Approval Status	Holds the following values: Pending, Approved, Rejected	
Approved By	ID of the user that approved the Invoice.	
Disapprove Reason	Will be activated if the invoice is disapproved.	Values in Code table InvoiceDisapproveReasons
Invoice Date	The date on the invoice header.	
Invoice Line Number	Identifier for the Invoice line.	
Invoice Line Type	Type of the invoice line.	Code table: InvoiceLineType. **NOTE:** Invoice lines of type Adjustment are not expenditure transactions; therefore, they are not available in reports.
Invoice Number	Number of the invoice	See the field location in Alma in **Figure 157**.
Payment Status	Indicates if the Invoice was paid or not.	See the field location in Alma in **Figure 158**.
Payment Voucher Amount	The amount of the payment voucher	
Payment Voucher Date	The date that the voucher was created	
Payment Voucher Number	Number of the voucher that the invoice was paid by ERP.	
Subscription From Date	For continuous lines: Start date of the subscription.	
Subscription To Date	For continuous lines: End date of the subscription.	
Payment Method	Payment method of the Invoice, (e.g. credit card, cache) Values are in CT: 'PaymentMethod	

Table 19. Invoice Line

Field	Description	Additional Information
Prepaid Ind	Indicates if the Invoice is prepaid. If the invoice is prepaid then it won't be exported to ERP.	See the field location in Alma in **Figure 158**.
External Invoice Reference Number	Holds the External Invoice Reference Number	
Invoice Creator	Holds the user name that created the Invoice	
Invoice Creation Date	Holds the timestamp of the Invoice creation date	
Invoice Modified By	Holds the user name that modified the Invoice	
Invoice Modification Date	Holds the timestamp of the Invoice modification date	
Invoice Line Creator	Holds the user name that created the Invoice Line	
Invoice Line Creation Date	Holds the timestamp of the Invoice Line creation date	
Invoice Line Modified By	Holds the user name that modified the Invoice Line	
Invoice Line Modification Date	Holds the timestamp of the Invoice Line modification date	
Unique Invoice Identifier	Identifies the invoice uniquely	
Unique Invoice Line Identifier	Identifies the invoice line uniquely	



Status	Vendor Account Code	Vendor Account Description	Invoice Line Number	Invoice Line Type	Invoice Number	Payment Status	Payment Method	Prepaid Ind	Invoice Line Total Price
INREVIEW	A2863-1	Houtschild - Main Library	1	Regular	INV-802	NOT_PAID			50

Figure 156: Invoice Line Report

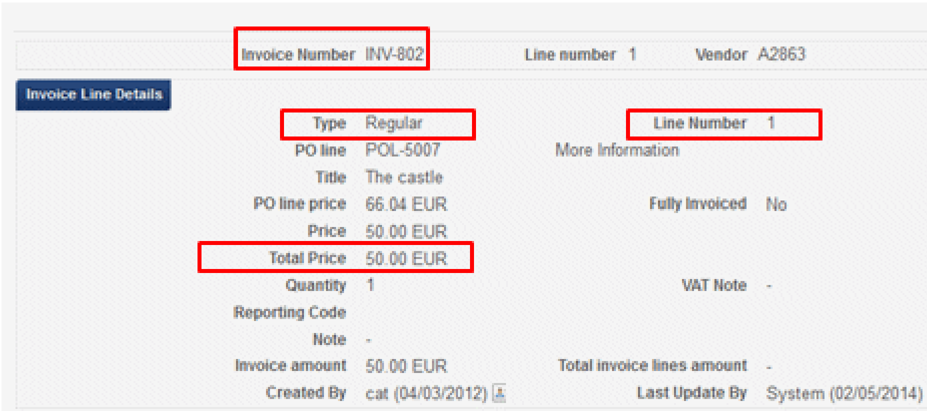


Figure 157: Invoice Line Details

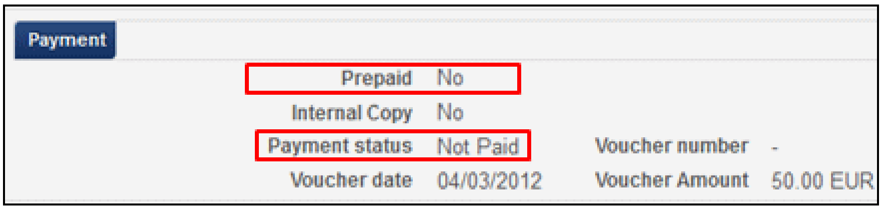


Figure 158: Invoice Details

Bibliographic Details

The Bibliographic Details table is a dimension table that stores bibliographic details about the inventory item that was purchased. The primary key of the table is MMS_ID.

NOTE:

The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Periods Outer

The Periods Outer table is a dimension table that stores details about the transaction date of transactions, such as month, year, and quarter. The difference between this table and the transaction date table is that in this table the transaction dates are not normalized to the fiscal period.

The primary keys are Date_Key.

NOTE:
The field descriptions can be found under the Funds Expenditure subject area section in **Transaction Dates** on page **149**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

10

Fulfillment

Using the Fulfillment subject area, the Design Analytics user may create reports and dashboards for the Item Loan area. The following are examples of business questions that may be answered via the Fulfillment subject area:

- How many items were loaned, returned, or lost per library?
- How many items were loaned between specific loan dates?
- How many items were loaned from a particular circulation desk?
- What is the due-date policy of the loaned items?
- How many items were loaned per classification?

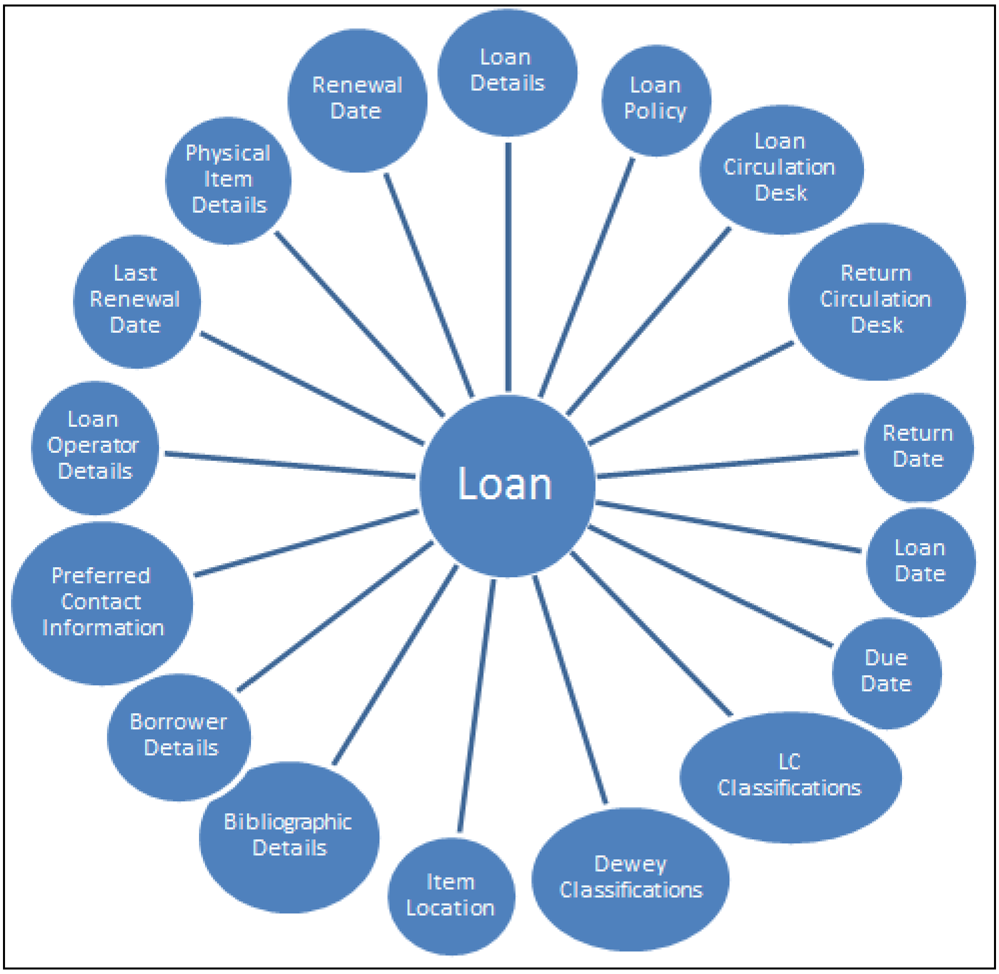


Figure 159: Star Diagram – Fulfillment

Field Descriptions

The following lists the fields available in Fulfillment.

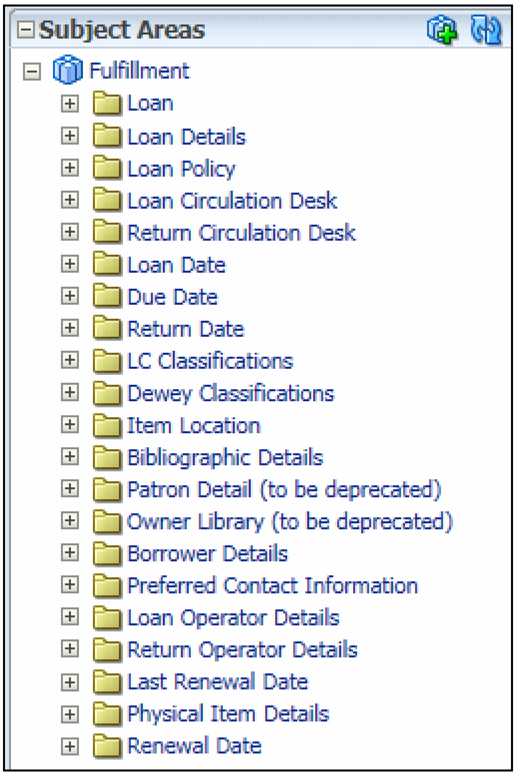


Figure 160: Fulfillment – Field Descriptions

Loan

The Loan fact table stores all the measures of a specific loan. The primary key is ITEM_LOAN_ID.

Report Creation Tips

- **Filtering results using the In House Loan indicator**

  In house loans are used to monitor items that were used in the library, but not actually loaned. When a return is made on an item that was not loaned, an in-house loan is created for it.

  Some industry reports require that these loans be included in the loan count and others do not; therefore, use a filter to include or exclude these results from your loan count, as necessary.

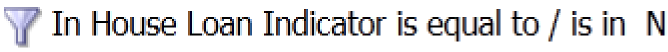


Figure 161: In House Loan Indicator Filter

The In-House Loan Indicator field is located in the Loan Details folder.

- **How to distinguish between self-check transactions and staff transactions**

  Although there is no specific field that indicates the difference between self-check transactions and staff transactions, you can distinguish between the two based on the fact that the Loaned By\Returned By name for self-check machines is **None**.

  - Filter for returns:

    ```
    CASE WHEN "Returned By"."User Name" = 'None' THEN 'Self-
    Check Machines' ELSE 'Staff 'END
    ```

  - Filter for loans:

    ```
    CASE WHEN "Loaned By"."User Name" = 'None' THEN 'Self-Check
    Machines' ELSE 'Staff ' ENDq2
    ```

Guidelines for Using Filters Based on Loan and Renewal Dates

The easiest way to count the number of loans and number of renewals done in a certain time period is to create two separate reports. One report counts the number of loans based on the loan date. The other report counts the number of renewals based on the renewal date.

In the following example, the number of loans is filtered by `loan year=2013`:

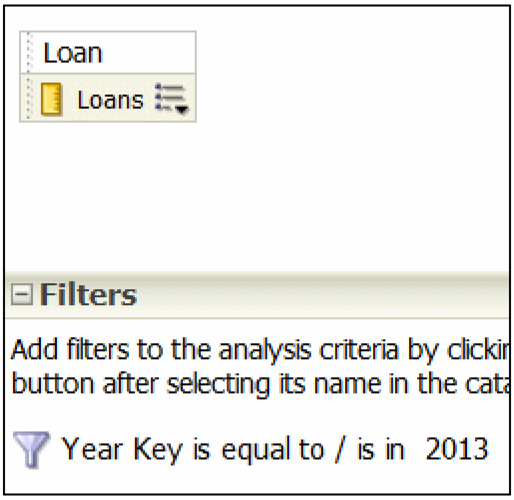


Figure 162: Loan Filter

The following is displayed:

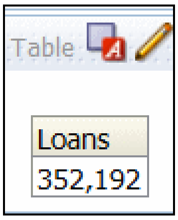


Figure 163: Loans

In the following example, the number of renewals is filtered by `renewal year=2013`:

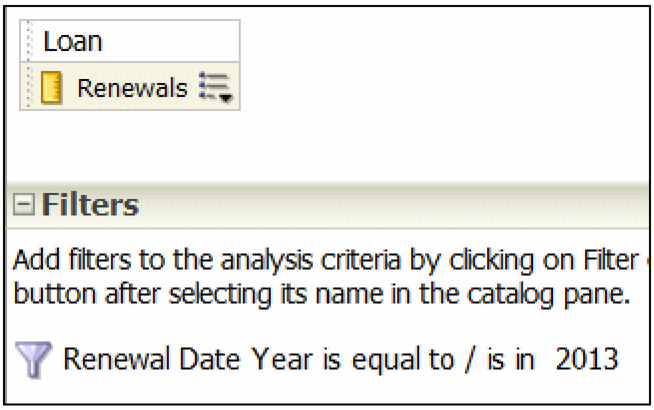


Figure 164: Renewals Filter

The following is displayed:

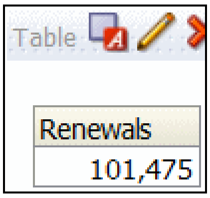


Figure 165: Renewals

It is possible to create a single report showing the number of loans and renewals in a certain time period, each based on its relevant date; however, it requires some more complex AND\OR conditions in order to find the right population.

The following is an example of filtering all loans done in 2013 OR all renewals done in 2013. (You may need to run some tests when creating reports with slightly different filters to make sure you have the right population.)

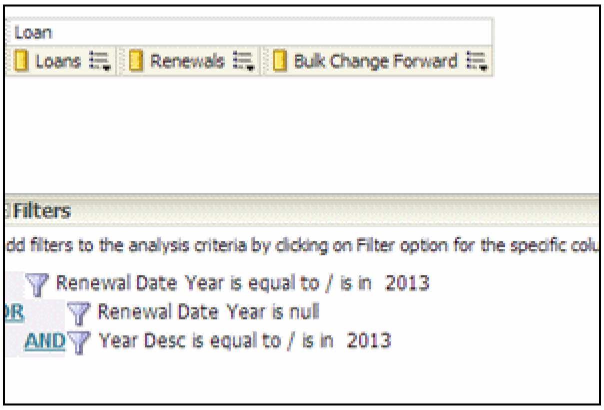


Figure 166: Loans and Renewals Filter

The report appears as follows:

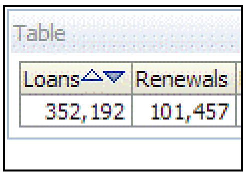


Figure 167: Renewals)

Table 20. Fulfillment Fields

Field	Description	Additional Information
Loans	Populated with 1. This field accumulates the number of loans.	
Returns	Populated with 1 if the loan status is Complete; otherwise, it is populated with 0.	
Recalls	Stores the number of times the item was recalled	
Renewals	Stores the number of times the item was renewed	
Lost	Populated with 1 if the item is lost; otherwise, it is populated with 0.	
Claimed Returns	Populated with 1 if the patron claims that the item has been returned; otherwise, it is populated with 0.	
Auto Renewals	Stores the number of times the item was automatically renewed	
Reading Room at Shelf	Populated with 1 if the loan is a reading room loan and item is currently on the shelf; otherwise, it is populated with 0.	
Reading Room at User	Populated with 1 if the loan is a reading room loan and is currently held by the patron; otherwise, it is populated with 0.	
WB Change Backward	Stores the number of times the workbench due date was changed to an earlier date by a circulation desk operator at the circulation desk	
WB Change Forward	Stores the number of times the workbench due date was changed to an later date by a circulation desk operator at the circulation desk	

Table 20. Fulfillment Fields

Field	Description	Additional Information
Bulk Change Backward	Stores the number of times the item was changed to an earlier date as part of a bulk change	
Bulk Change Forward	Stores the number of times the item was changed to a later date as part of a bulk change	
Loan Days	Stores the number of days between the loan date and the return date	
Return Due Days	Stores the number of days between the return date and the due date	

Loan Details

The Loan Details table is a dimension table that stores additional details regarding the loan. The primary key is ITEM_LOAN_ID.

Table 21. Fulfillment – Loan Details

Field	Description	Additional Information
Item ID	Stores the ID of the item that was loaned	
Barcode	Stores the barcode of the item that was loaned	
Call Number	Stores the call number of the item that was loaned	
LC Classification Code	Stores the letters of the LC class number of the item that was loaned such as BF or QA	
LC Classification Number	Stores the numbers that follow the classification letters until the first period that is followed by a letter	

Table 21. Fulfillment – Loan Details

Field	Description	Additional Information
LC Classification Top Line	Stores the combined LC code and classification numbers until the first period followed by a letter such as NB933 when the lc_class_number is NB933.F44	
Dewey Classification Top Line	Stores the first 3 digits of the Dewey classification	
Loan Status	Indicates if the loan is active or has already been returned; also known as historical loan	Possible values: ■ Active – On loan ■ Complete – Returned ■ Inactive – Deleted
Process Status	Indicates the current status of the loan	
Loan Note	Stores the note attached to the loan by the circulation desk operator	
Recall Date	Stores the date on which the item was recalled	
Recall Time	Stores the time in the hours:minutes:seconds format for the recall date	
Original Due Date	Stores the original due date given to the loan	
Original Due Time	Stores the time in the hours:minutes:seconds format for the original due date	
New Due Date	Stores the current due date as displayed in Alma	The new due date can differ from the original due date due to a recall or renewal
New Due Time	Stores the time in the hours:minutes:seconds format of the new due date	
Item Loan ID	Stores the unique ID of the loan for the item	This is useful to find a specific loan of an item

Table 21. Fulfillment – Loan Details

Field	Description	Additional Information
In House Loan Indicator	Y/N field that indicates if the loan is an in-house or a regular loan. Null means that it is not an in-house loan.	
Is Booking Loan	Indicates whether the loan is on an item that was booked.	

Loan Policy

The Loan Policy table is a dimension table that stores the due date policy details as defined under **Fullfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Advanced Policy Configuration > Policy Type = due date**.

Table 22. Fulfilment – Loan Policy

Field	Description	Additional Information
Measurement Value	Stores the number of days or weeks that are used to calculate the due date.	Use this with the unit of measurement field. See the field location in Alma in **Figure 169**
Policy Name	Stores the name given to the policy	See the field location in Alma in **Figure 169**
Is Active	Indicates if the policy is currently active	
Definition Level	Indicates what level of the organization was used to define the policy, Library or Institution	See the field location in Alma in **Figure 169**
Policy Constant	Stored only if the due date is a constant value	
Policy Description	Stores the description given to the policy	
Policy Is Default Value	Indicates if this is the default policy used by the organization	See the field location in Alma in **Figure 169**

Table 22. Fulfilment – Loan Policy

Field	Description	Additional Information
Policy Type	Since this dimension is only for policy with type "due date", this is the value for this field.	See the field location in Alma in **Figure 169**
Unit of Measurement	Stores the unit of measurement such as days or weeks	See the field location in Alma in **Figure 169**

Policy Name	Measurement Value	Unit of Measurement	Policy Type	Is Active	Definition Level	Policy Constant	Policy Description	Policy Is Default Value
1 Week Loan	1	Week	Due Date	1	Institution			N
1 day Loan	1	Days	Due Date	1	Institution			N
14 day loan	14	Days	Due Date	1	Institution			N
2 day Loan	2	Days	Due Date	1	Institution			N

Figure 168: Loan Policy Report

Fulfillment Policies

Policy Type Due Date   Find :   in : Policy

Add Fulfillment Policy   1 - 17 of 17 Records

	Policy Type	Policy Name	Value	Unit Of Measurement	Is Default	Policy Owner
1	Due Date	1 Week Loan	1	Week		Institution
2	Due Date	1 day Loan	1	Days		Institution
3	Due Date	14 day loan	14	Days		Institution
4	Due Date	2 day Loan	2	Days		Institution
5	Due Date	2 hour Loan	2	Hours		Institution
6	Due Date	21 day loan	21	Days		Institution
7	Due Date	3 day Loan	3	Days		Institution
8	Due Date	3 week Loan	3	Week		Institution
9	Due Date	4 Hour Laptop	240	Minute		Institution
10	Due Date	4 hour Loan	4	Hours		Institution
11	Due Date	42 day loan	42	Days		Institution
12	Due Date	5 day Loan	5	Days		Institution
13	Due Date	6 Week Loan	6	Week		Institution
14	Due Date	7 day loan	7	Days		Institution
15	Due Date	End of Term	End of Term Summer	-	✔	Institution
16	Due Date	No Due Date - Non-circulatable	0	Week		Generic
17	Due Date	No Loan	0	Days		Institution

Figure 169: Advanced Policy Configuration

Loan Circulation Desk

The Loan Circulation Desk table is a dimension table that stores the details about the circulation desk from which the item was loaned.

Circulation desks are the place where items can be physically checked out or in and where circulation services are rendered. Each circulation desk is associated with a library and serves specific locations in that library

Using this dimension table, a user is able to drill down from the campus level to the library and to the loan circulation desk. Measures (loans or returns) are accumulated to the relevant level in the hierarchy.

Table 23. Fulfillment – Loan Circulation Desk

Field	Description	Additional Information
Campus Code	Stores the code of the campus to which the circulation desk is connected.	
Campus Description	Stores the description of the campus to which the circulation desk is connected.	
Campus Name	Stores the name of the campus to which the circulation desk is connected.	
Circ Desk Code	Stores the code of the circulation desk	
Circ Desk Desc	Stores the description of the circulation desk	
Circ Desk Name	Stores the name of the circulation desk	
Has Self Check	Indicates whether the circulation desk has a self-check machine	
Hold Shelf	Indicates whether the circulation desk has the ability to hold items for patron requests	
Hold Shelf Period	Indicates the amount of time an item is held on the shelf for a patron before being returned	

Table 23. Fulfillment – Loan Circulation Desk

Field	Description	Additional Information
Hold Shelf Sort	Stores the way items are physically stored on the shelf such as requester name, title, and date, for example.	
Library Code	Stores the library code to which the circulation desk is connected	
Library Desc	Stores the library description to which the circulation desk is connected	
Library Name	Stores the library name to which the circulation desk is connected	
Payment Cash	Indicates whether the circulation desk accepts payments in cash	
Payment Credit Card	Indicates whether the circulation desk accepts payments by credit card	
Primary Indicator	Indicates whether the circulation desk is able to send/accept items that need to be transferred out of the library	
Print Receipt	Indicates whether the circulation desk prefers payment receipts to be printed automatically	
Reading Room Desk	Indicates whether the circulation desk is a desk in a reading room where items cannot be removed from the room	

Table 23. Fulfillment – Loan Circulation Desk

Field	Description	Additional Information
Loan Circulation Desk	Stores the is Hierarchy column that allows the user to drill down from the campus to the library to the loan circulation desk. This column provides the user with the option to view the accumulative measures in each level of the hierarchy.	

Return Circulation Desk

The Return Circulation Desk table is a dimension table that stores the details about the circulation desk to which the item was returned.

NOTE:
For a description of the fields, see **Loan Circulation Desk** on page **178**.

Loan Date

The Loan Date table is a dimension table that stores the details about the item's loan date (month, year, and quarter). Using this dimension table, a user is able to drill down from the year to the month and to the specific date that the item was loaned. Measures (loans or returns) are accumulated to the relevant level in the hierarchy.

Table 24. Fulfillment – Loan Date

Field	Description	Additional Information
Loan Date	Stores the loan date in the date format 2/29/2012	
Loan Month Key	Stores the month of the date in number format such as 2 for February	This field is useful when you want to sort by month
Loan Month	Stores the month of the date in month description format such as February	
Loan Full Month	Stores the month and the year of the date in a display format such as Feb 12	

Table 24. Fulfillment – Loan Date

Field	Description	Additional Information
Loan Quarter	Stores the quarter of the date in a display format such as Q1	
Loan Year	Stores the year of the date in string format such as 2012	
Loan Fiscal Year	Stores the fiscal year of the date in string format such as 2012.	
Loan Time	Stores the time in the hours:minutes:seconds format for the loan date	
Year Key (to be deprecated)	Stores the year of the date in number format such as 2012	This field will be deleted in a future release.
Full Quarter Key (to be deprecated)	Stores the year and the quarter of the date in a number format such as 20,121 (the first quarter of 2012)	This field will be deleted in a future release.
Quarter Key (to be deprecated)	Stores the quarter of the date in a number format such as 1	This field will be deleted in a future release.
Fiscal Full Month key (to be deprecated)	Stores the fiscal year and the month of the date in a number format such as 201,209 (fiscal year 2012)	This field will be deleted in a future release.
Fiscal Full Quarter Key (to be deprecated)	Stores the fiscal year and the quarter of the date in a number format such as 20,123	This field will be deleted in a future release.
Fiscal Full Quarter Desc (to be deprecated)	Stores the fiscal quarter and the fiscal year of the date in a display format such as Q3/2012	This field will be deleted in a future release.
Full Quarter Desc (to be deprecated)	Stores the year and the quarter of the date in a display format such as Q1/2012	This field will be deleted in a future release.
Fiscal Year Key (to be deprecated)	Stores the fiscal year of the date in a number format such as 2012.	Taken from the institution fiscal period configuration table. This field will be deleted in a future release.
Fiscal Quarter Key (to be deprecated)	Stores the fiscal quarter of the date in a number format such as 3	This field will be deleted in a future release.

Table 24. Fulfillment – Loan Date

Field	Description	Additional Information
Fiscal Quarter Desc (to be deprecated)	Stores the fiscal quarter of the date in a display format such as Q3	This field will be deleted in a future release.
Full Month Key (to be deprecated)	Stores the year and the month of the date in a number format such as 201,202	This field will be deleted in a future release.
Fiscal Month Key (to be deprecated)	Stores the fiscal month of the date in a number format such as 9 for September	This field will be deleted in a future release.
Loan Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific loan date. Using this column provides the user with the option to view the accumulative measures in each level of the hierarchy.	

Due Date

The Due Date table is a dimension table that stores the details about the item's due date such as month, year, or quarter. The key fields can be used when calculations are required, and the description fields can be used for formatting the display of the report.

NOTE:
For a description of the fields, see **Loan Date** on page **180**.

Return Date

The Return Date table is a dimension table that stores the details about the item's return date such as month, year, and quarter. The key fields can be used when calculations are required, and the description fields can be used for formatting the report display.

NOTE:
For a description of the fields, see **Loan Date** on page **180**.

LC Classifications

Each book has a call number that consists of letters, whole numbers, and sometimes a decimal number. Each call number is arranged into, at least, two lines. The first line is referred to as the top line. The second line always begins directly after the cutter symbol. A cutter symbol is a period followed by a letter.

Alma takes LC classification information from the holdings level.

NOTE:
The field descriptions can be found in the LC Classification shared dimension. For more information, see **LC Classifications** on page **127**.

Dewey Classification

Books can be classified with Dewey Classification.

In Dewey Classification, topics are ordered in a hierarchy that is indicated by a three digit number. The highest level of the hierarchy is indicated by a number with one significant digit followed by two zeros, such as 600. The second level in the hierarchy is indicated by a number with two significant digits followed by one zero, such as 630. The third level in the hierarchy is indicated by a number with three significant digits such as 636.

NOTE:
The field descriptions can be found in the Dewey Classification shared dimension. For more information, see **Dewey Classification** on page **128**.

Item Location

The Item Location table is a dimension table that stores the details about the shelving location of the item on loan. The primary key of the table is LIBRARYID and LOCATION_CODE.

Table 25. Fulfillment – Item Location

Field	Description	Additional Information
Campus Code	Stores the code of the campus to which the location of the item on loan is connected, calculated through the library campus.	
Campus Name	Stores the description of the campus to which the location of the item on loan is connected, calculated through the library campus.	
Campus Description	Stores the name of the campus to which the location of the item on loan is connected, calculated through the library campus.	

Table 25. Fulfillment – Item Location

Field	Description	Additional Information
Library Code	Stores the library code to which the location of the item on loan belongs	
Library Name	Stores the library name to which the location of the item on loan belongs	The value for this field is taken from the Owner Library > Library Name field. For more information, see **Owner Library (to be deprecated)** on page **185**.
Library Desc	Stores the library description to which the location of the item on loan belongs	
Location Code	Stores the code of the location of the item on loan	
Location Name	Stores the name of the location of the item on loan	
Location Type	Stores the type of the location of the item on loan, whether it is open stack or closed stack	
Call Number Type	Stores the call number type used by the location of the item on loan	
External Name	Stores the name to be displayed to patrons for the location of the item on loan	
Remote Storage Code	Points to a remote storage where the items are stored if this exists	
Location	Stores the Hierarchy column that allows the user to drill down from the campus to the library and then to the location of the item that was loaned.Using this column provides the user with the option to have the user view the accumulative measures (loans or returns) in each level of the hierarchy.	

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details about the items at the time of the loan.

The primary key of the table is MMS_ID.

NOTE:
The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Patron Details (to be deprecated)

The Patron Details table is a dimension table that stores the patron details at the time of the loan. The primary key of the table is ITEM_LOAN_ID.

Table 26. Patron Details

Field	Description	Additional Information
Patron Group	Stores the group of the patron to whom the item is loaned.	
Patron ID	Stores the unique identifier of the patron to whom the item is loaned	
Patron Job Title	Stores the job title of the patron to whom the item is loaned. Users in the library may be given titles based on their role in the library.	
Patron Record Type	Indicates whether the patron to whom the item is loaned is a staff member	
Patron Type	Stores the type of the patron to whom the item is loaned. Users are grouped into types. Internal is a user type that has been created by the library. External is a type of user of the library supplied/created from the student information system.	

Owner Library (to be deprecated)

The Owner Library table is a dimension table that stores the details about the library to which the loaned item belongs. The primary key of the table is ORGANIZATION_ID

Table 27. Owner Library

Field	Description	Additional Information
Library Code	Stores the library code to which the item on loan belongs	
Library Description	Stores the library name to which the item on loan belongs	
Library Name	Stores the library description to which the item on loan belongs	
Organization Type	Stores the type of organization unit (Institution/Library)	

Borrower Details

The Borrower Details table is a dimension table that stores the details about the user to whom the item is loaned.

For privacy reasons related to security requirements, loans may require anonymization after a defined period of time. Once anonymized, the specific user details are no longer viewable and analytics retrieves NULL for these values. You can configure Alma to delete only the more specific information (for example, User ID) and retain the more general user information (for example, User Group and Job Title).

The following fields can be configured to not be deleted when performing anonymization:

- User Type
- User Group
- Campus Code
- Job Title
- User Statistics 1
- User Statistics 2
- User Statistics 3
- User Statistics 4
- User Statistics 5

NOTE:

The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Preferred Contact Information

The Preferred Contact Information table is a dimension table that stores the details about the user's preferred contact information such as preferred address, preferred phone, preferred email. and preferred SMS phone number.

For privacy reasons related to security requirements, loans may require anonymization after a defined period of time. Once anonymized, the preferred contact information is no longer viewable and analytics retrieves NULL for these values.

Table 28. Preferred Contact Information

Field	Description	Additional Information
Line1	Stores the first line of the user's preferred address	
Line2	Stores the second line of the user's preferred address	
Line3	Stores the third line of the user's preferred address	
Line4	Stores the fourth line of the user's preferred address	
Line5	Stores the fifth line of the user's preferred address	
City	Stores the city of the user's preferred address	
Postal Code	Stores the postal code of the user's preferred address	
Country	Stores the country of the user's preferred address	
State Province	Stores the state or province of the user's preferred address	
Address Type	Stores the type of the preferred address such as home or work	
Preferred Phone Number	Stores the user's preferred phone number	
Preferred SMS	Stores the user's preferred phone number for SMS	
Preferred Email	Stores the user's preferred email for correspondence	

Table 28. Preferred Contact Information

Field	Description	Additional Information
Note	Stores a note regarding the user's preferred address	

Loan Operator Details

The Loaned By table is a dimension table that stores the details about the staff user that created the loan, such as name, job title, and status.

NOTE:
The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Return Operator Details

The returned By table is a dimension table that stores the details about the staff user that returned the loan, such as name, job title, and status.

NOTE:
The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Last Renewal Date

The Last Renewal Date table is a dimension table that stores details about the renewal date of a specific loan. This dimension was created before the Renewal Date dimension was added and is less useful now. The primary keys are Date_Key.

NOTE:
For a description of the fields, see **Loan Date** on page **180**.

Physical Item Details

The Physical Item Details table is a fact table holds details about the physical items including, for example, barcode and material type. The primary key is ITEM_ID.

NOTE:
The field descriptions can be found in **Physical Item Details** on page **207**.

Renewal Date

The Renewal Date table is a dimension table that stores all measures relating to the renewal date of loans. The primary key is DATE_KEY.

Table 29. Renewal Date

Field	Description	Additional Information
Renewal Date Month	The month of the renewal date (for example: January, February).	
Renewal Date Month Key	The month of the renewal date in number format such as 2 for February.	
Renewal Date Full Month	The month and the year of the renewal date (for example: January 2014).	
Renewal Date Quarter	The quarter of the renewal date (for example: Q1, Q2).	
Renewal Date Year	The year of the renewal date (for example: 2014).	
Renewal Date	The date of the renewal.	

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

11

E-Inventory

Using the E-Inventory subject area, the Design Analytics user may create reports and dashboards for the E-Inventory area. The following are examples of business questions that may be answered via the E-Inventory subject area:

- Electronic Collection List - Drill down to Portfolio list in each electronic collection
- Number of portfolio per classification (Dewey, LC)

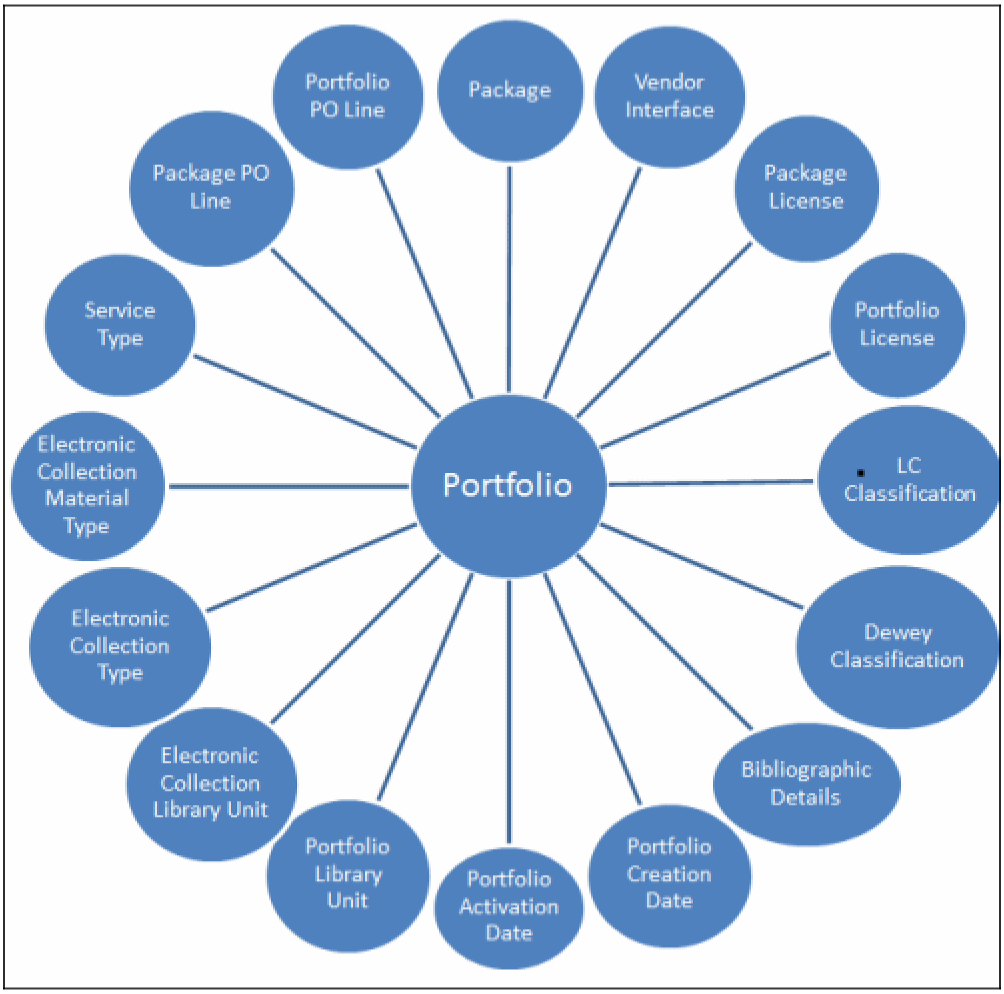


Figure 170: Star Diagram – E-Inventory

Field Descriptions

The following lists the fields available in E-Inventory:

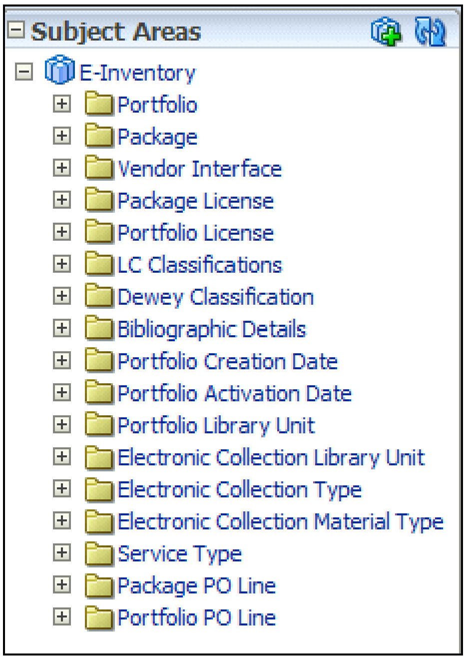


Figure 171: E-Inventory – Field Descriptions

Portfolio

The Portfolio fact table stores all the measures and information of a Portfolio. The primary key is PORTFOLIO_ID.

Table 30. Portfolio

Field	Description	Additional Information
Active from date	First day of activation	
Active to date	Last day of activation	
Availability	Indicates whether the portfolio is Active or Inactive	
Creator	The user who created the Portfolio	
Date Info	Coverage information that indicate the content that was purchased/activated.	
Embargo Months	Provides a moving wall of availability. Month in the format of MM	

Table 30. Portfolio

Field	Description	Additional Information
Embargo Operator	Provides a moving wall of availability. The Operator can be >, <, or =	
Embargo Years	Provides a moving wall of availability. Year in the format of YYYY	
Expected Activation Date	expected date of the portfolio activation	
Is Free	Indicates whether the portfolio is supplied for free	
LC Classification Code	the letters of the LC class number of the item that is loaned such as BF or QA	
LC Classification Number	the numbers that follow the classification letters until the first period that is followed by a letter	
Modification Date	The date information was updated in the portfolio	
Modified By	User name that modified the portfolio	
Portfolio Id	Id of the portfolio	
Portfolio Link Id	For portfolios activated from the Community Zone - Id of the Portfolio in the Community Zone	
PPS Link Id	For portfolios activated from the Community Zone - Id of the PPS in the Community Zone	
No. of Portfolio	Calculated field - Holds the number 1	
Material Type	The material type of the portfolio.	

Table 30. Portfolio

Field	Description	Additional Information
Coverage Statement	The coverage statement type.	Possible values are: ■ Only Local ■ Global and Local ■ Global or Local ■ Only Global **NOTE:** For more information concerning the coverage statement, see the **Modifying a Portfolio Using the Electronic Portfolio Editor** section of the *Alma Resource Management Guide***Managing Electronic Resource Activation** on page **395**.

Some of the fields of the Portfolio dimension are taken from the fields of the Electronic Porfolio Editor

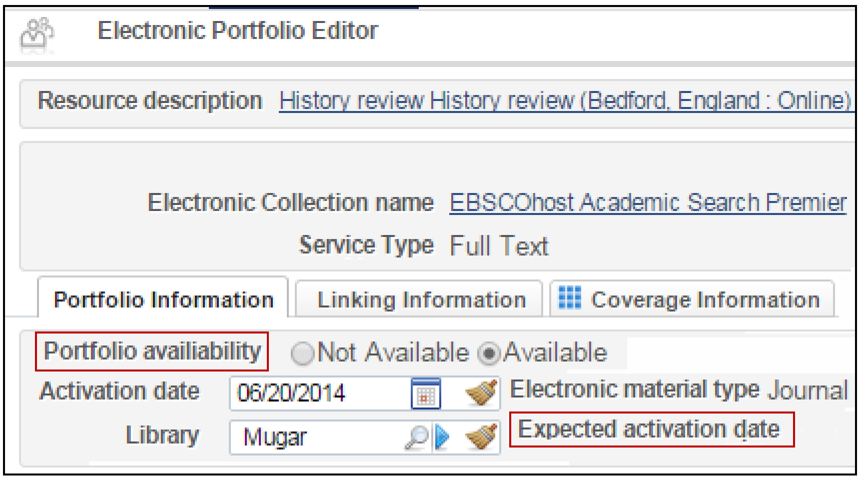


Figure 172: Electronic Portfolio Editor

\Package

The Package table is a dimension table that stores additional details regarding the package. The primary key is PACKAGE_ID.

Table 31. Electronic Collection

Field	Description	Additional Information
Activation date	The date the electronic collection was activated	
Create date	The date the electronic collection was created	
creator	The staff user who created the electronic collection	
Expected activation date	The expected date of the electronic collection activation	
Link ID	The ID of the electronic collection in the Community Zone for electronic collections activated from the Community Zone.	
Modification date	The date information in the electronic collection has been updated	
Modified by	The user name that updated electronic collection information	
Electronic Collection id	ID of the Electronic Collection	
Public name	The name to display in the discovery search results.	

Vendor Interface

The Vendor Interface table is a dimension table that stores additional details regarding the Vendor Interface. The primary key is INTERFACE_NAME.

Table 32. Vendor Interface

Field	Description	Additional Information
Available	The availability of usage statistics for the resource.	Possible values are: Yes, No.

Table 32. Vendor Interface

Field	Description	Additional Information
Create date	The date the interface was created	
creator	The user who created the interface	
Delivery address	Usage statistics delivery addressee - The contact name within the library.	
Delivery method	The manner in which statistics are made available	
description	Holds information about the interface	
Format	The formats in which statistics are made available, such as HTML, Excel, ASCII, Other	
Frequency	The frequency with which statistics are made available.	Possible values are: Annual, Bi-annual, Monthly, Quarterly, User-selectable
Incident log	A log of downtime and problem reports, as well as their resolution.	
Interface name	Name of the Interface	
Interface note	Additional information related to the Interface.	
Interface status	Defines the status of the Interface.	Possible values - Active, Inactive
Linking note	Information about external linking, such as implementation details or other notes (Administrative)	
Locally stored	Usage statistics locally stored - Information about and/or links to locally stored data	
Modification date	The date information in the Interface has been updated	
Modified by	The user name that updated Interface information	

Table 32. Vendor Interface

Field	Description	Additional Information
Online location	The online location where statistics can be accessed, such as a URL or file path.	
Open URL compliant	Indicates whether the electronic product and its content are compliant with OpenURL.	Possible values are: Yes, No.
Statistics note	Information about external linking, such as implementation details or other notes (Statistics)	
Vendor code	Vendor code	
Vendor name	Vendor Name	

Package License

The Package License table is a dimension table that stores the details of the package portfolio license. The primary key is LICENSE_ID.

NOTE:
See the same fields and descriptions as in **Portfolio License** on page **198**.

Portfolio License

The Portfolio License table is a dimension table that stores the details of the Portfolio License. The primary key is LICENSE_ID.

Table 33. Portfolio License

Field	Description	Additional Information
code	Code of the License	
Create date	The date the License was created	
creator	The user who created the License	
License begins	The date on which the License becomes Active	
License ends	The date on which the License become Inactive.	

Table 33. Portfolio License

Field	Description	Additional Information
License id	Id of the License	
License parent id	For Amendments - id of the base License	
License signed	the date on which the license was signed	
License storage location	physical location of the license	
License signed by	User that approved the License	
Licensor id	Id of the vendor associated with the License.	
Modification date	The date information in the License has been updated	
Modified by	The user name that updated License information	
name	The name of the license	
Originating licensor key		
Originating parent code	For Amendments - the Code of the base License	
Review status	status of the license review, such as Accepted, In review, Pending, Rejected	
status	Status of the License such as Active, Deleted, Draft.	
type	Type of record, such as License, Amendment, Template.	

LC Classifications

Using this dimension table, a user is able to drill down from Group1 to Group4. In each level, users may view measures accumulated to the relevant group.

NOTE:
The field descriptions can be found in the LC Classification shared dimension. For more information, see **LC Classifications** on page **127**.

Dewey Classifications

Using this dimension table, a user is able to drill down from Group1 to Group3. In each level, users may view measures accumulated to the relevant group.

NOTE:
The field descriptions can be found in the Dewey Classification shared dimension. For more information, see **Dewey Classification** on page **128**.

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details of the borrowing request item. The primary key of the table is MMS_ID.

NOTE:
The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Portfolio Creation Date

The Portfolio Creation Date table is a dimension table that stores details about the Portfolio creation date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period.

Using this dimension, the user may drill down from year to month to the specific date on which the Portfolio was created. The number of portfolios is accumulated to the relevant level in the hierarchy.

Table 34. Portfolio Creation Date

Field	Description	Additional Information
Portfolio Creation Date	Stores the physical item creation date in a date format such as 2/29/2012	
See similar fields and descriptions as in **Item Creation Date** on page **212**.		

Table 34. Portfolio Creation Date

Field	Description	Additional Information
Portfolio Creation Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific creation date. This column provides the user the option to view the cumulative measures in each level of the hierarchy.	

Portfolio Activation Date

The Portfolio Activation Date table is a dimension table that stores details about the Portfolio activation date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period.

Using this dimension, the user may drill down from year to month to the specific date on which the Portfolio was created. The number of portfolios is accumulated to the relevant level in the hierarchy.

Table 35. Portfolio Activation Date

Field	Description	Additional information
Portfolio Activation Date	Stores the electronic portfolio creation date in a date format such as 2/29/2012	
See the same fields and descriptions as in **Item Creation Date** on page **212**.		
Portfolio Activation Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific activation date.	This column provides you with the option to view the cumulative measures in each level of the hierarchy.

Portfolio Library Unit

The Portfolio Library Unit table is a dimension table that stores details about the library where the electronic portfolio is located. The primary key of the table is LIBRARYID.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Electronic Collection Library Unit

The Electronic Collection Library Unit table is a dimension table that stores details about the library where the electronic collection is located. The primary key of the table is ORGANIZATION_ID.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Electronic Collection Type

The Electronic Collection Type is a dimension table that stores the details about the Type of the Electronic resource. The primary key is CODE.

Table 36. Electronic Collection Type

Field	Description	Additional Information
CODE	Code of the Electronic Collection Type	
DESCRIPTION	Description of the Electronic Collection Type, such as - Aggregator, Selective.	

Electronic Collection Material Type

The Electronic Collection Material Type is a dimension table that stores the details about the Type of the electronic resource. The primary key is CODE.

Table 37. Electronic Material Type

Field	Description	Additional Information
Code	Code of the material type of the resource	VARCHAR
description	Description of the material type of the resource, such as BOOK, JOURNAL, MAP.	VARCHAR

Service Type

The Service Type table is a dimension table that holds the Type of Service. The primary key is CODE.

Table 38. Service Type

Field	Description	Additional Information
Code	Code of the service type of the resource	
descrip tion	Description of the service type of the resource, such as Full Text, Selected Full Text	

Package PO Line

The Package PO Line table is a dimension table that stores details about the PO package and the PO line package that is associated with the fund transaction. The primary key is PO_LINE_REFERENCE.

NOTE:
The field descriptions can be found in the PO Line shared dimension. For more information, see **PO Line** on page **115**.

Portfolio PO Line

The Portfolio PO Line table is a dimension table that stores details about the PO and the PO line that is associated with the fund transaction. PO line is the management unit of the order. The inventory item holds all information needed to create the inventory item, fund transaction, as well as manage the receiving, renewing, and activating ordered inventory items. The primary key of the table is PO_LINE_ID.

NOTE:
The field descriptions can be found in the PO Line shared dimension. For more information, see **PO Line** on page **115**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

12

Physical Items

Using the Physical Items area (formerly Inventory), the Design Analytics user may create reports/dashboards for the Physical Items area and is able to answer the following types of business questions:

- How many physical Items exists per Library/Location
- List of all the titles based on their process type
- Number of Physical Items per material type
- How many times each item was loaned
- What is the last date that the item was loaned

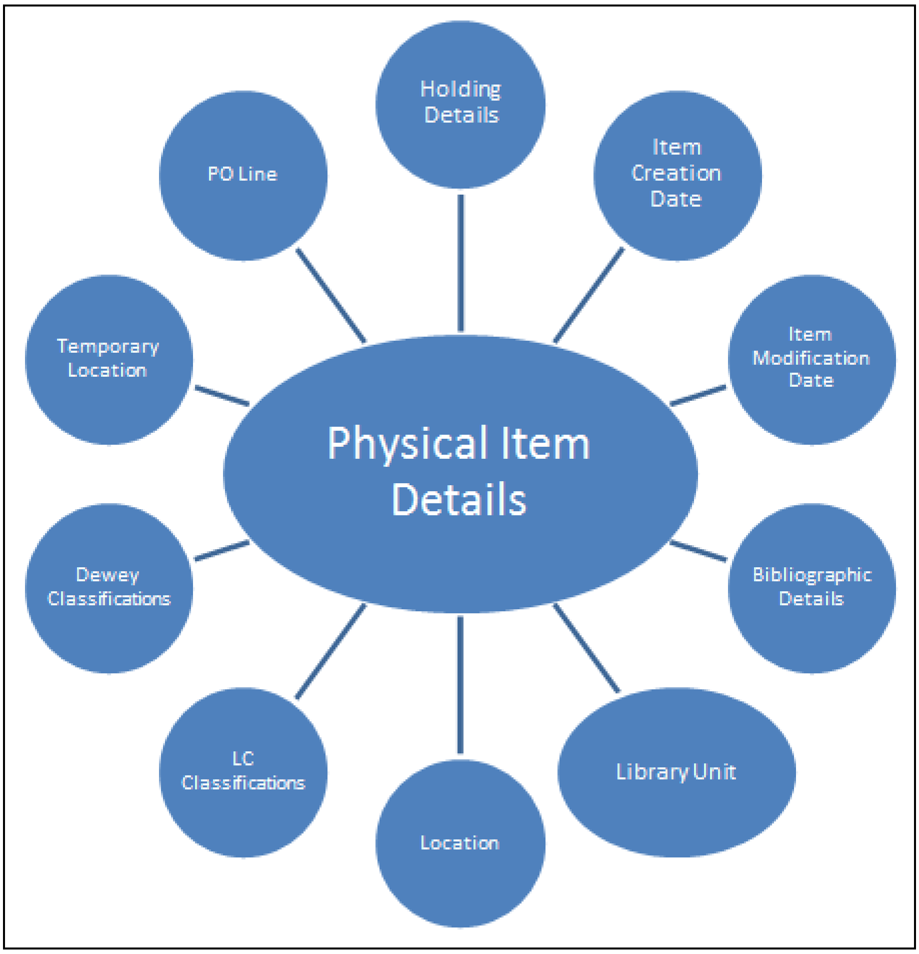


Figure 173: Star Diagram – Physical Items

Field Descriptions

The following lists the fields available in Physical Items.

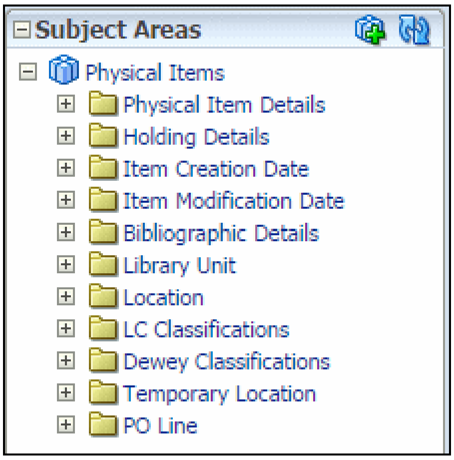


Figure 174: Physical Items – Field Descriptions

Physical Item Details

The Physical Item Details table is a fact table that stores all measures relating to specific physical items such as number of items, time loaned, etc. This table also holds details about the physical items including barcode and material type. The primary key is ITEM_ID.

Table 39. Physical Item Details

Field	Description	Additional Information
Num of Items	Stores the number of items (one for each item)	
Time Loaned	Stores the number of times that the physical item was loaned	
Item ID	Stores the unique ID of the physical item	
Barcode	The unique identifier of the specific physical item	
Material Type	Describes the nature of the material represented by the item record	
Item Policy	Defines the conditions under which a request for this item can be fulfilled	

Table 39. Physical Item Details

Field	Description	Additional Information
Provenance Code	A code used to identify separate items that belong to different groups (but may be shelved together)	
Base Status	Indicates the availability of the item in its permanent location (in place/not in place)	
Process Type	When the item is being processed (acquisition/loan/ bindery/etc) this indicates the type of process	
Life Cycle	Indicates whether the item is active or deleted	
Chron I	The main level of chronology - usually the year	
Enum A	The main level of enumeration - usually the volume	
Is Magnetic	Whether the item is magnetic material or not.	This is used in the circulation desk in order not to desensitize magnetic material
Expected Arrival Date	The date when a purchased item is expected to arrive at the library	
Due Back Date	Indicates the date that the item is due back at the library	
Receiving Date	The date the material was actually received/activated for the first time	
Inventory Date	The last time inventory was checked (not currently in use)	
Last Loan Date	The last time the item was loaned	
Temporary Physical Location In Use	Whether the item is in a temporary location or in a permanent location	
Temporary Call Number Type	A call number type provided when the item is in a temporary location	

Table 39. Physical Item Details

Field	Description	Additional Information
Display Temporary Call Number	A normalized temporary call number for display	
Alternative Call Number Type	An alternative call number type	
Display Alternative Call Number	A normalized alternative call number for display	
Originating System ID	The ID of the item in the source system from which it has been imported	
Creator	Holds the username of the operator that created the physical item	
Modified By	Holds the user name that modified the physical item	
Creation Date	Holds the date the physical item was created	This date is assigned by Alma when the physical item is created.
Modification Date	Holds the date the physical item was modified	
Times Loaned - no Sum	Holds the number of times each item was loaned but not as an aggregate like Time Loaned	
Statistics Note 1	Holds statistic notes	
Statistics Note 2	Holds statistic notes	
Statistics Note 3	Holds statistic notes	
Description	Description of the item	

Most of the fields of the Physical Items details dimension are taken from the fields of the Physical Item Editor:

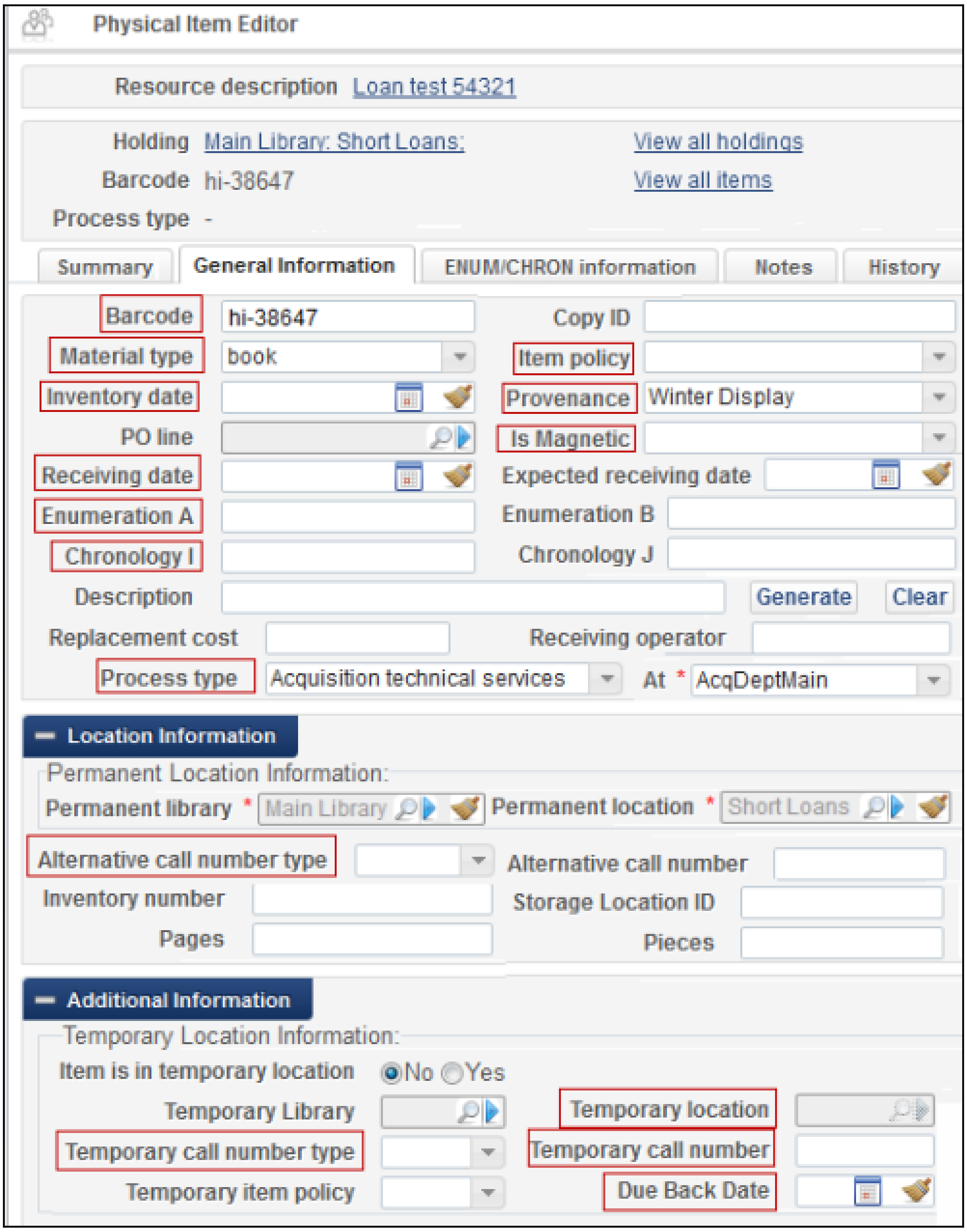


Figure 175: Physical Items Details Fields in Physical Item Editor

Holding Details

The Holding Details table is the dimension table that stores additional details about physical items. The primary key is ITEM_ID.

Table 40. Holding Details

Field	Description	Additional Information
Permanent Call Number Type	The call number type.	Possible values are: ■ Source specified in subfield $2 ■ None ■ Superintendent of Documents classification ■ Shelved separately ■ Shelving control number ■ Other scheme ■ National Library of Medicine classification ■ Dewey Decimal classification ■ Unknown ■ Library of Congress classification ■ Title
Holding ID	The unique identifier of the holding	
Permanent Call Number	A code used to file the items on the shelf	
Normalized Call Number	Holds the normalized call number	
Permanent LC Classification Code	Stores the letters that the LC class number start with such as BF, QA, etc.	
Permanent LC Classification Number	Stores the numbers that follow the letters until the first period that is followed by a letter	
Permanent LC Classification Top Line	Stores the LC class number top line that represents the code and numbers until the first period followed by a letter.	For example, when lc_class_number is NB933.F44, the top line is NB933).

Table 40. Holding Details

Field	Description	Additional Information
Permanent Dewey Classification Top Line	Store the first 3 digits of the Dewey Classification	
Accession Number	A sequential code used to file items on the shelf.	
Copy ID	When multiple copies of the same title exist at the same library/location, the copy ID is used to identify each of the copies.	
Summary Holding	Free-text enumeration and chronology data	

Item Creation Date

The Item Creation Date table is a dimension table that stores details about the physical item creation date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. In the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user may drill down from year to month to the specific date on which the physical item was created. The number of the physical item is accumulated to the relevant level in the hierarchy.

Table 41. Item Creation Date

Field	Description	Additional Information
Item Creation Date	Stores the item creation date in a date format such as 2/29/2014.	
Item Creation Month Key	Stores the month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.

Table 41. Item Creation Date

Field	Description	Additional Information
Item Creation Month	Stores the month of the date in month description format such as February	
Item Creation Full Month	Stores the month and the year of the date in a display format such as Feb 12	This field is useful when comparing data on a month basis between years.
Item Creation Quarter	Stores the quarter of the date in a display format such as Q1	
Item Creation Year	Stores the year of the date in number format such as 2012	
Item Creation Fiscal Year	Stores the fiscal year of the date in a string format such as 2012.	If the fiscal year description is stored in the institution fiscal period configuration table, this value is taken from there.
Full Month Key (to be deprecated)	Stores the year and the month of the date in a number format such as 2012,02	This field will be deleted in a future release.
Quarter Key (to be deprecated)	Stores the quarter of the date in a number format such as 1	This field will be deleted in a future release.
Full Quarter Key (to be deprecated)	Stores the year and the quarter of the date in a number format such as 2012,1 (the first quarter of 2012)	This field will be deleted in a future release.
Full Quarter Desc (to be deprecated)	Stores the year and the quarter of the date in a display format such as Q1/2012	This field will be deleted in a future release.
Year Key (to be deprecated)	Stores the year of the date in number format such as 2012	This field will be deleted in a future release.
Fiscal Month key (to be deprecated)	Stores the fiscal month of the date in a number format such as 9 for September	This field will be deleted in a future release.

Table 41. Item Creation Date

Field	Description	Additional Information
Fiscal Full Month key (to be deprecated)	Stores the fiscal year and the month of the date in a number format such as 2012,09 (fiscal year 2012)	This field will be deleted in a future release.
Fiscal Full Quarter Desc (to be deprecated)	Stores the fiscal quarter and the fiscal year of the date in a display format such as Q3/2012	This field will be deleted in a future release.
Fiscal Full Quarter Key (to be deprecated)	Stores the fiscal year and the quarter of the date in a number format such as 2012,3	This field will be deleted in a future release.
Fiscal Quarter Desc (to be deprecated)	Stores the fiscal quarter of the date in a display format such as Q3	This field will be deleted in a future release.
Fiscal Quarter Key (to be deprecated)	Stores the fiscal quarter of the date in a number format such as 3	This field will be deleted in a future release.
Fiscal Year Key (to be deprecated)	Stores the fiscal year of the date in a number format such as 2012.	This field will be deleted in a future release.
Creation Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific modification date.	This column provides you with the option of viewing the accumulative measures in each level of the hierarchy.

Item Modification Date

The Modification Date table is a dimension table that stores details about modification of physical item inventory. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. For the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user can drill down from year to month to the specific date on which the physical item was created. The number of physical item is accumulated to the relevant level in the hierarchy.

NOTE:
The Item Modification Date is updated when a core activity is performed, but not a fulfillment activity.

Table 42. Item Modification Date

Field	Description	Additional Information
Item Modification Date	Stores the item modification date in a date format such as 2/29/2014.	
Item Modification Month Key	Stores the month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.
Item Modification Month	Stores the month of the date in month description format such as February	
Item Modification Full Month	Stores the month and the year of the date in a display format such as Feb 12	This field is useful when comparing data on a month basis between years.
Item Modification Quarter	Stores the quarter of the date in a display format such as Q1	
Item Modification Year	Stores the year of the date in number format such as 2012	
Item Modification Fiscal Year	Stores the fiscal year of the date in a string format such as 2012.	If the fiscal year description is stored in the institution fiscal period configuration table, this value is taken from there.
Full Month Key (to be deprecated)	Stores the year and the month of the date in a number format such as 2012,02	This field will be deleted in a future release.

Table 42. Item Modification Date

Field	Description	Additional Information
Full Quarter Key (to be deprecated)	Stores the year and the quarter of the date in a number format such as 2012,1 (the first quarter of 2012)	This field will be deleted in a future release.
Full Quarter Desc (to be deprecated)	Stores the year and the quarter of the date in a display format such as Q1/2012	This field will be deleted in a future release.
Quarter Key (to be deprecated)	Stores the quarter of the date in a number format such as 1	This field will be deleted in a future release.
Year Key (to be deprecated)	Stores the year of the date in number format such as 2012	This field will be deleted in a future release.
Fiscal Full Month key (to be deprecated)	Stores the fiscal year and the month of the date in a number format such as 2012,09 (fiscal year 2012)	This field will be deleted in a future release.
Fiscal Month key (to be deprecated)	Stores the fiscal month of the date in a number format such as 9 for September	This field will be deleted in a future release.
Fiscal Full Quarter Desc (to be deprecated)	Stores the fiscal quarter and the fiscal year of the date in a display format such as Q3/2012	This field will be deleted in a future release.
Fiscal Full Quarter Key (to be deprecated)	Stores the fiscal year and the quarter of the date in a number format such as 2012,3	This field will be deleted in a future release.
Fiscal Quarter Desc (to be deprecated)	Stores the fiscal quarter of the date in a display format such as Q3	This field will be deleted in a future release.
Fiscal Quarter Key (to be deprecated)	Stores the fiscal quarter of the date in a number format such as 3	This field will be deleted in a future release.
Fiscal Year Key (to be deprecated)	Stores the fiscal year of the date in a number format such as 2012.	This field will be deleted in a future release.

Table 42. Item Modification Date

Field	Description	Additional Information
Modification Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific modification date. By using this column it provides the user the option to view the accumulative measures in each level of the hierarchy.	

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details of the physical item. The primary key of the table is MMS_ID.

NOTE:
The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Library Unit

The Library Unit table is a dimension table that stores details about the library that manages acquisitions.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Location

The Location table is a dimension table that stores the details about the location of the physical item. The primary key of the table is LIBRARYID and LOCATION_CODE.

Table 43. Location

Field	Description	Additional Information
Campus Code	Stores the code of the campus where the physical item is located.	This value is calculated through the library campus.

Table 43. Location

Field	Description	Additional Information
Campus Name	Stores the description of the campus.	This value is calculated through the library campus.
Campus Description	Stores the name of the campus.	This value is calculated through the library campus.
Library Code	Stores the library code to which the location of the physical item belongs.	It is recommended to use the Library Code field of the Library Unit Dimension instead of this one.
Library Name	Stores the library name to which the location of the physical item belongs.	It is recommended to use the Library Name field of the Library Unit Dimension instead of this one.
Library Desc	Stores the library description to which the location of the physical item belongs.	
Location Code	Stores the code of the location of the physical item.	
Location Name	Stores the name of the location of the physical item.	
Location Type	Stores the type of the location of the physical item, whether it is open stack or closed stack.	
Call Number Type	Stores the call number type used by the location of the physical item.	
External Name	Stores the name to be displayed to patrons for the location of the physical item.	
Remote Storage Code	Points to a remote storage location where the physical items are stored, if one exists.	
Location	Stores the Hierarchy column that allows the user to drill down from the campus to the library and then to the location of the physical item.	This column provides the user with the option to have the user view the accumulative measures (num_of_items) in each level of the hierarchy.

LC Classification

Using this dimension, the user may drill down from Group1 to Group4. In each level, the user may see measures accumulated to the relevant group and see the number of items grouped by classification.

All the fields are from the BI_DIM_CLASSIFICATIONS table.

NOTE:
The field descriptions can be found in the LC Classifications shared dimension. For more information, see **LC Classifications** on page **127**.

Dewey Classification

Books can be classified with Dewey Classification.

In Dewey Classification, topics are ordered in a hierarchy that is indicated by a three digit number. The highest level of the hierarchy is indicated by a number with one significant digit followed by two zeros, such as 600. The second level in the hierarchy is indicated by a number with two significant digits followed by one zero, such as 630. The third level in the hierarchy is indicated by a number with three significant digits such as 636.

NOTE:
The field descriptions can be found in the Dewey Classification shared dimension. For more information, see **Dewey Classification** on page **128**.

Temporary Location

The Temporary Location table is a dimension table that stores details about the temporary location where the physical item is located. The primary key of the table is LIBRARYID and LOCATION_CODE.

NOTE:
The field descriptions can be found in **Location** on page **217**.

PO Line

The PO Line table is a dimension table that stores details about the PO and the PO Line that is associated with the fund transaction. PO Line is the management unit of the order. The inventory item holds all information needed to create the inventory item, fund transaction, as well as manage the receiving, renewing, and activating ordered inventory items. The primary key of the table is PO_LINE_ID.

NOTE:
The field descriptions can be found in the PO Line shared dimension. For more information, see **PO Line** on page **115**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

13

Borrowing Requests

Using the Borrowing Requests area, the Design Analytics user can create reports/dashboards for the Borrowing Requests area and is able to answer the following types of business questions:

- Which partners were requested
- Request counts
- Which type of users issue the requests
- Time statistics between request and arrival
- How many requests were rejected
- How many requests were completed

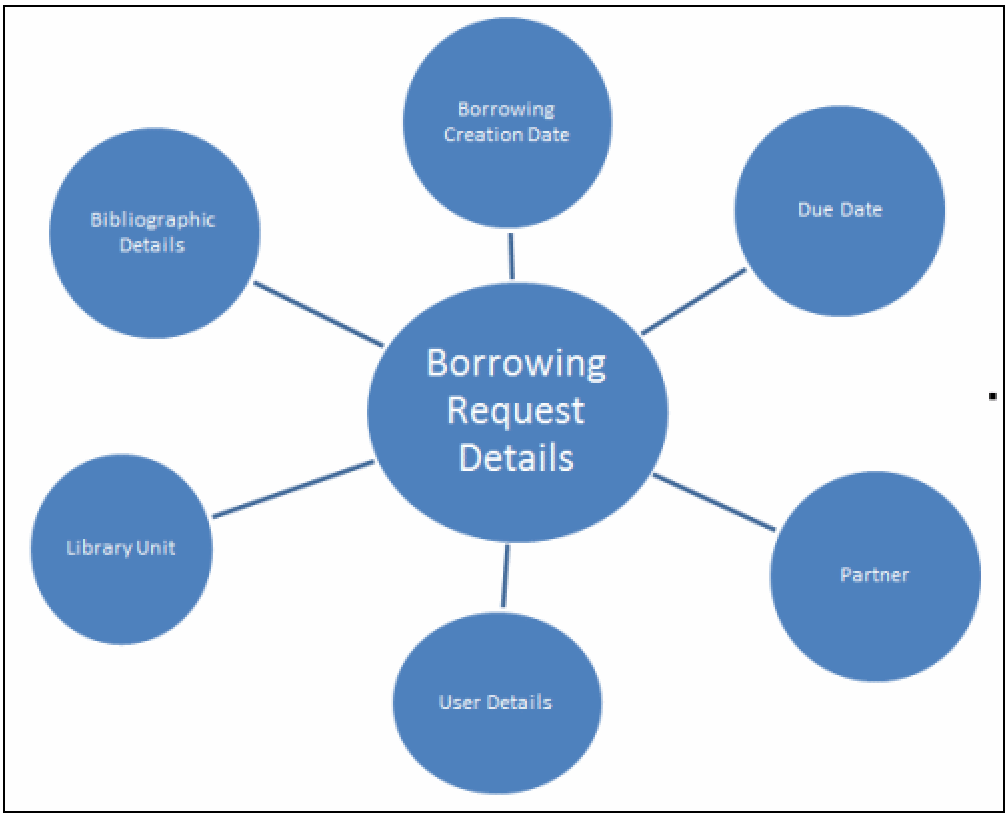


Figure 176: Star Diagram– Borrowing Requests

Field Descriptions

The following lists the fields available in Borrowing Requests.

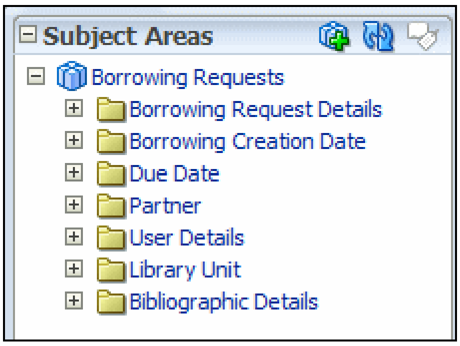


Figure 177: Borrowing Requests – Field Descriptions

Borrowing Requests Details

The Borrowing Requests table is a fact table that stores all measures relating to specific borrowing requests from a specific partner. This table also holds details about the borrowing requests, including request status, request format, and locate status. The primary keys are ID and PARTNER_ID.

Table 44. Borrowing Requests Details

Field	Description	Additional Information
Num of Requests	Holds the number of patron borrowing requests	
Num of Active Requests	Holds the number of borrowing requests whose Partner Active Status is set to Active	
Num of Non Fulfilled Partner Requests	Holds the number of borrowing requests whose Partner Active Status is set to Reject (indicates that the request to this partner cannot be fulfilled)	
Days of Request to Material Arrival	Number of days from when the request was created until the material arrived	
Days of Request Sent to Material Arrival	Number of days from when the request was sent to the partner until the material arrived	
Days of Request Sent to Non-Fulfilled	Number of days past from when the request was sent to the partner until it was rejected (non-fulfilled)	
Days of Arrival to Patron Loan	Number of days from when the material arrived until the patron loaned the item	
Days of Patron Check-In to Return	Number of days from when the patron checked in the item until it was returned to the ILL library	
Borrowing Request Status	Holds the status of the request	
Request Format	Indicates the format of the request (Digital/Physical)	
Locate Status	Indicates whether the resource is located or not	

Table 44. Borrowing Requests Details

Field	Description	Additional Information
Citation Type	Indicates whether the resource is an article or book	
Partner Active Status	Indicates whether the partner record is Active/Rejected/Non-Active	
Partner Request Status	Indicates the request status of the specific partner	
BL Requested Delivery Terms	British Library codes for the delivery format and speed	
BL Requested Actions	British Library codes for other instructions for queries	
BL Request Targets	British Library codes for where to search for the material	
BL Customer ID	Holds the customer code and password of the British Library system	
ID	Holds the Unique ID of the borrowing request	
Full Request ID	Hold Request ID	
Needed by Date	Holds the date by which this material is needed	
Request Non-Fulfilled Date	Holds the date that the request was rejected for this partner	
Request Sending Date	Holds the date that the request was sent to the partner	
Item Arrival Date	Holds the date that the material arrived to the library	
Item Loan Date	Holds the date that the material was loaned by the patron	
Item Check-In Date	Holds the date that the item was returned to the library by the patron	
Item Return Date	Holds the date that the item was returned to the ILL	

Table 44. Borrowing Requests Details

Field	Description	Additional Information
Item ID	Holds the Item ID of the borrowing resource	
Identifier	Holds the ISSN/ISBN of the requested resource	
Title	Holds the requested title	
Item Loan ID	Holds the item loan ID after the item was loaned	
Item Loan Indicator	Indicates whether the requested resource was loaned	
Patron Information Indicator	Indicates whether more information is needed from the patron	
Request Completed Indicator	Indicates whether the life cycle of the request is in progress or it is completed	
Max Fee	Holds the maximum fee that the patron is willing to pay for this service	
Agree Copyright	Indicates whether the patron has checked the Agree Copyright checkbox	
Note	A text field for comments	
Creator	Stores the creation date	
Modification Date	Stores the user name that modified the record	
Modified By	Stores the modification date	
Due Date	Holds the due date of the item	
Shipping Cost	The shipping cost.	
Shipping Cost Currency	The currency of the shipping cost.	
External Identifier	The ID of the library that fulfills the borrowing request	

Borrowing Creation Date

The Creation Date table is a dimension table that stores details about the borrowing request creation date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields that are displayed in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. In the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user may drill down from year to month to the specific date on which the borrowing request was created. The total number of borrowing requests is listed next to the relevant level in the hierarchy.

Table 45. Borrowing Creation Date

Field	Description	Additional Information
Borrowing Creation Date	Stores the borrowing request creation date in a date format such as 2/29/2012.	
For a description of the fields of the Borrowing Creation Date table, see **Loan Date** on page **180**.		
Creation Date	Stores the Hierarchy column that allows the user to drill down from the year to the month and from the month to the specific creation date.	This column provides the user with the option to view the cumulative measures in each level of the hierarchy.

Due Date

The Due Date table is a dimension table that stores details about the due date of transactions, such as month, year, and quarter. The primary keys are Date_Key.

NOTE:
For a description of the fields, see **Loan Date** on page **180**.

Partner

The Partner table is a dimension table that stores the details about the partner to which the borrowing request was sent. All the fields are from the BI_DIM_PARTNER table. The primary key of the table is PARTNER_ID.

Table 46. Partner

Field	Description	Additional Information
Partner ID	Holds the unique partner ID	
Partner Name	Holds the partner name	
Partner Code	Holds the partner code	
Partner Description	Holds the partner description	
Partner Status	Holds the partner status (Active/ Reject/Non Active)	
Profile Type	Holds the protocol type with which we communicate with the partner (ARTEmail, NCIP)	
Average Supply Time	Average time it takes for the supplier to process the request and send the material	
Delivery Delay	Average time it takes to send an item back to this supplier	
Currency	Holds the currency that this partner is using	
Creation Date	Stores the name of the user that created the record	
Created By	Stores the creation date	
Modification Date	Stores the user name that modified the record	
Modified By	Stores the modification date	

User Details

The User Details table is a dimension table that stores the details about the Staff and Public users that request the item. The primary key of the table is USER_ID.

NOTE:

The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Library Unit

The Library Unit table is a dimension table that stores details about the library where the borrowing request was created. All the fields are from the BI_DIM_LIBRARY_UNIT table. The primary key of the table is LIBRARYID.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details of the borrowing request item. The fields are from the MMS_DISPLAY table. The primary key of the table is MMS_ID.

NOTE:
The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

14

Lending Requests

Using the Lending Requests area, the Design Analytics user may create reports/ dashboards for the lending requests area and is able to answer the following types of business questions:

- Which partners where requested?
- Lending Request counts
- Which type of users issue the requests
- Time statistics between request and sent

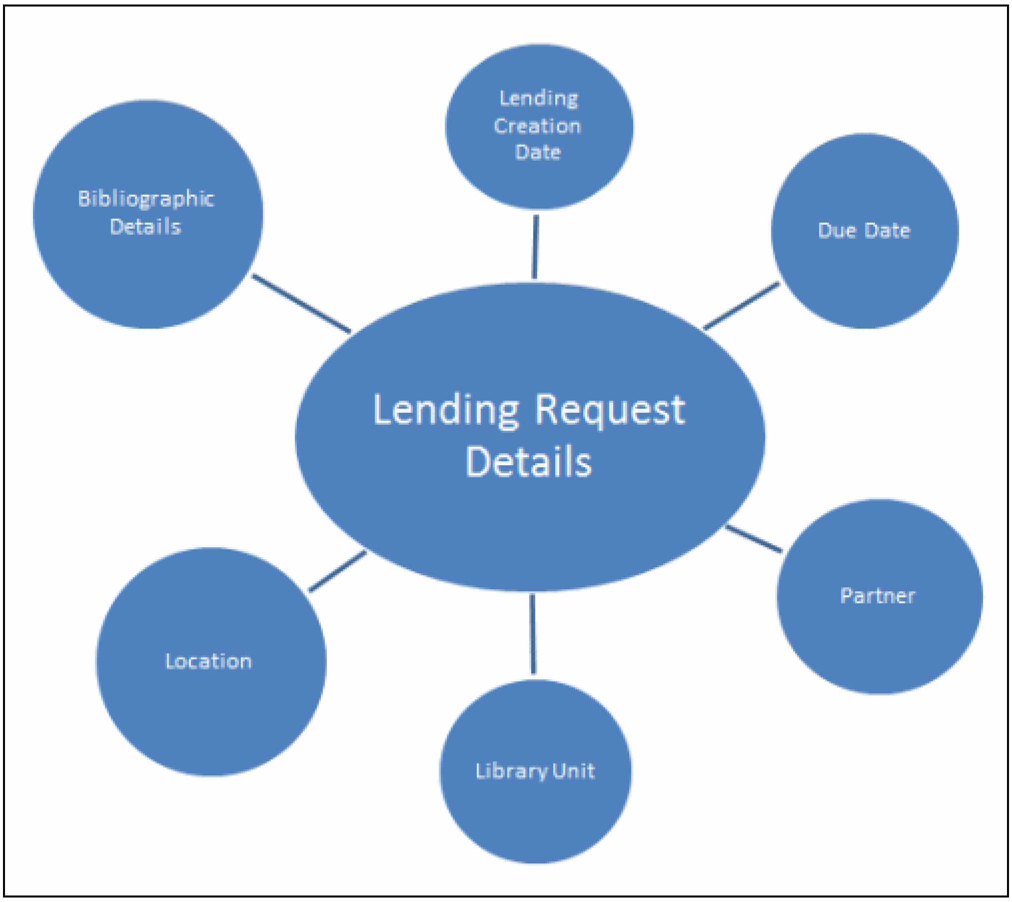


Figure 178: Star Diagram – Lending Requests

Field Descriptions

The following lists the fields available in Lending Requests:

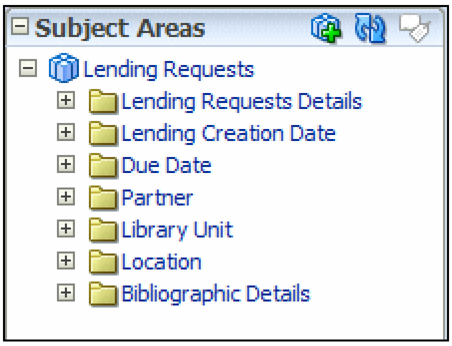


Figure 179: Lending Requests – Field Deceptions

Lending Requests Details

The Lending Requests table is a fact table that stores all measures relating to specific Lending requests. This table also holds details about the lending requests including request status, request format, and locate status. The primary key is ID.

Table 47. Lending Requests Details

Field	Description	Additional Information
Num of Requests	Holds the number of lending requests	
Days of Request created to Material Sent	Number of days from when the lending request was created until the material was sent to the requested partner	
Days of Material Sent to Return	Number of days from when the material sent to the partner until the material returned to the library	
Lending Request Status	Holds the status of the request	
Request Format	Indicates the format of the request (Digital/Physical)	
Locate Status	Indicates whether the resource has been located or not	
Citation Type	Indicates whether the resource is an article or book	
ID	Holds the Unique ID of the lending request	
Assign To	The staff user that is assigned to handle the lending request	
Needed by Date	Holds the date by which this material is needed	
Due Date	Holds the due date of the item	
Item ID	Holds the Item ID of the borrowing resource	

Table 47. Lending Requests Details

Field	Description	Additional Information
Material Type	Holds the Item material type	
Item Policy	Hold the item policy	
Item Barcode	Holds the item barcode	
Item Sent Date	Holds the date that item was sent to the partner	
Item Return Date	Holds the date that the item returned to the library	
Identifier	Holds the ISSN/ISBN of the requested resource	
Title	Holds the requested title	
Requester Email	Holds the email address of the requester	
External Request ID	Holds the Request ID that arrived from the partner (external system ID)	
Note	Text field for comments	
Creator	Stores the creation date	
Modification Date	Stores the user name that modified the record	
Modified By	Stores the modification date	
Shipping Cost	The shipping cost.	
Shipping Cost Currency	The currency of the shipping cost.	

Lending Creation Date

The Creation Date table is a dimension table that stores details about the lending request creation date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. In the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user may drill down from year to month and from month to the specific date on which the lending request was created. The number of the lending requests is accumulated to the relevant level in the hierarchy.

Table 48. Lending Creation Date

Field	Description	Additinal Information
Lending Creation Date	Stores the lending request creation date in a date format such as 2/29/2012	
See the same fields and descriptions as in **Loan Date** on page 180.		
Creation Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific creation date.	This column provides the user the option to view the cumulative measures in each level of the hierarchy

Due Date

The Due Date table is a dimension table that stores the details about the item's due date such as month, year, or quarter. The key fields can be used when calculations are required, and the description fields can be used for formatting the display of the report. All the fields are from the BI_DIM_PERIODS table. Alma stores the following types of fields:

NOTE:
For a description of the fields, see **Loan Date** on page **180**.

Partner

The Partner table is a dimension table that stores the details about the partner from which the lending request was received. The primary key of the table is PARTNER_ID.

Table 49. Partner

Field	Description	Additional Information
Partner ID	Holds the unique partner ID	
Partner Name	Holds the partner name	
Partner Code	Holds the partner code	
Partner Description	Holds the partner description	

Table 49. Partner

Field	Description	Additional Information
Partner Status	Holds the partner status (Active/Reject/Non Active)	
Profile Type	Holds the protocol type used to communicate with the partner (ARTEmail, NCIP)	
Average Supply Time	Average time it takes for the supplier to process a request and send the material	
Delivery Delay	Average time it takes to send the item back to the supplier	
Currency	Holds the currency that this partner is using	
Creation Date	Stores the name of the user that created the record	
Created By	Stores the creation date	
Modification Date	Stores the user name that modified the record	
Modified By	Stores the modification date	

Library Unit

The Library Unit table is a dimension table that stores details about the library where the borrowing request was created. All the fields are from the BI_DIM_LIBRARY_UNIT table. The primary key of the table is LIBRARYID.

NOTE:

The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Location

The Location table is a dimension table that stores details about the location of the physical item. All the fields are from the BI_DIM_LOCATION table the primary key of the table is LIBRARYID and LOCATION_CODE.

NOTE:

The field descriptions can be found under **Location** on page **217**.

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details of the borrowing request item. The fields are from the MMS_DISPLAY table. The primary key of the table is MMS_ID.

NOTE:
The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

15

Usage Data

Using the Usage Data area, the Design Analytics user may create reports/ dashboards for the Usage Data area and is able to answer the following types of business questions:

- Most frequently used journals
- Annual journal usage trend.
- Total and monthly number of successful requests per each journal
- Database Usage - Annual Trend
- Most Frequently Used Databases
- Total number of searches and sessions per each database and the monthly/ yearly search statistics

NOTE:

UStat data will be included in your Alma analytics reports only if UStat is used by your institution and you load relevant, institution-specific vendor data to UStat. For details on how to use UStat, refer to the *UStat User's Guide* (under **UStat > Product Documentation** in the Documentation Center).

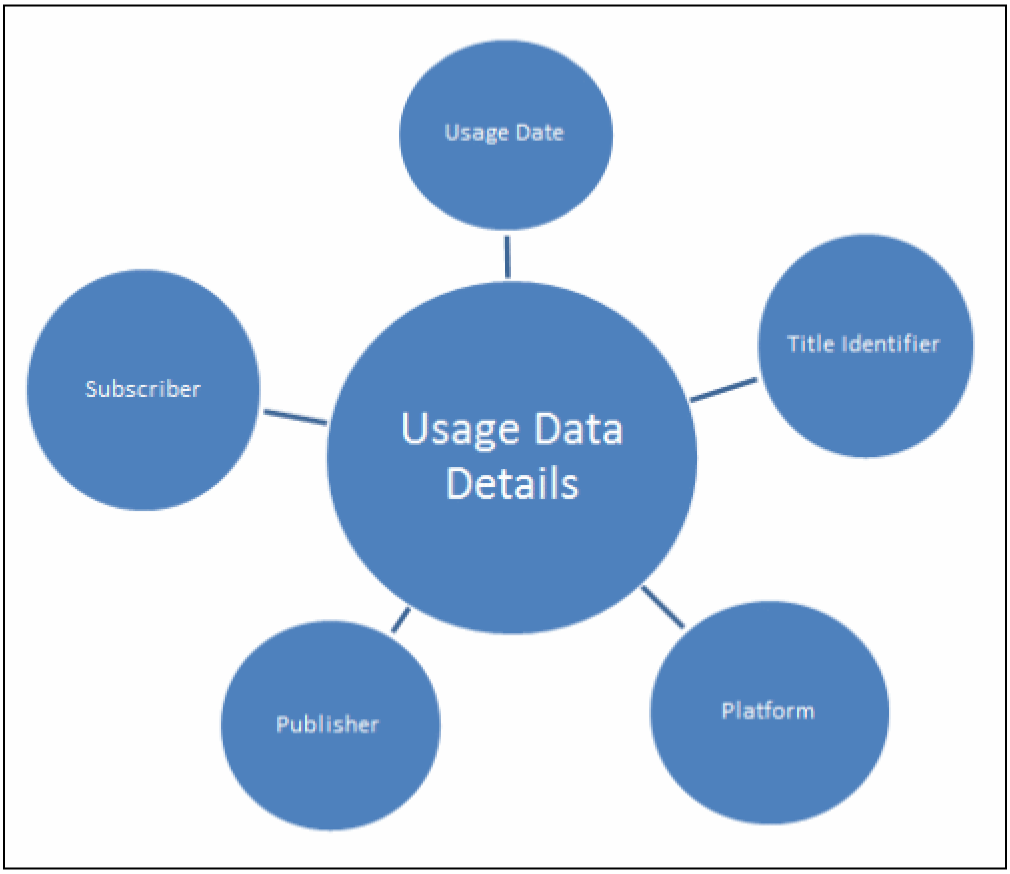


Figure 180: Star Diagram – Usage Data

Field Descriptions

The following lists the fields available in Usage Data.

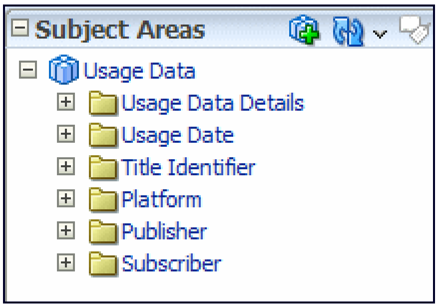


Figure 181: Usage Data – Field Descriptions

Usage Data Details

The Usage Data Details table is a fact table that stores all measures relating to specific Title/platform/publisher/subscriber. All fields are taken from the BI_USAGE table. The primary key is ID.

Table 50. Usage Data Details

Field	Description	Additional Information
Journal Usage Counter	The Number of successful full text article requests by Month and Journal report.	
DB Searches	The number of successful database searches	
DB Sessions	The number of DB sessions. DB session is the period of activity between a user logging in to database and logging out of a (multi-user) system.	
DB Federated Searches	Count the number of DB Federated searches.	Federated search is an information retrieval technology that allows the simultaneous search of multiple searchable resources. A user makes a single query request that is distributed to the search engines participating in the federation. The federated search then aggregates the results that are received from the search engines for presentation to the user.
DB Federated Sessions	The number of DB Federated sessions	
Title Identifier Counter	The number of unique title identifiers	

Table 50. Usage Data Details

Field	Description	Additional Information
Records Views	A successful request for a database record that has originated from a set of search results, from browsing the database, or from a click on another database record.	
Result Clicks	A click originating from a set of search results.	
DB or Journal Indicator	Indicate if the usage is DB usage or Journal usage	
Load File ID	Unique ID of the file loaded into USTAT	

Usage Date

The Usage Date table is a dimension table that stores details about the Title usage date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. All fields are from the BI_DIM_PERIODS table. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. In the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user can drill down from year to month. The usage is accumulated to the relevant level in the hierarchy.

Table 51. Usage Date

Field	Description	Additional Information
Date Key	Stores the Usage Date in a date format such as 2/29/2012 (The usage date is always the first day of the month)	
See the same fields and descriptions as in **Loan Date** on page **180**.		

Table 51. Usage Date

Field	Description	Additional Information
Usage Date	Stores the Hierarchy column that allows the user to drill down from the year to the month.	This column provides the user the option to view the cumulative measures in each level of the hierarchy.

Title Identifier

The Partner table is a dimension table that stores the details about the partner from which the lending request was received. The primary key of the table is TITLE_IDENTIFIER.

Table 52. Title Identifier

Field	Description	Additional Information
Title Identifier	The unique identifier of the title	
Origin Title	The original title of the Journal/ Database	
Display Title	The title in display format	
Display Title 20 Chars	Holds 20 characters from the title	
Normalized Title	The normalized title - small letters with underline between the words	
Origin EISSN	The Original EISSN (with dash)	
Normalized EISSN	The normalized EISSN without dash	
Origin ISSN	The Original ISSN (with dash)	
Normalized ISSN	The normalized ISSN without dash	

Platform

The Platform table is a dimension table that stores details about the platform. The primary key of the table is PLATFORM.

Table 53. Platform

Field	Description	Additional Information
Platform	The vendor or content provider. An interface from an aggregator, host, publisher, or service that delivers the content to the user and that counts and provides the COUNTER usage reports.	
Normalized Platform	The normalized platform name	

Publisher

The Publisher table is a dimension table that stores details about the publisher. The primary key of the table is PUBLISHER.

Table 54. Publisher

Field	Description	Additional Information
Publisher	An organization, whose function is to commission, creates, collect, validate, host, distribute and trade information online and/or in printed form.	
Normalized Publisher	The normalized publisher name	

Subscriber

The Subscriber table is a dimension table that stores details about the subscriber. The primary key of the table is SUBSCRIBER_ID.

Table 55. Subscriber

Field	Description	Additional Information
Subscriber ID	The unique ID of the subscriber	
Subscriber	The library or instance. An individual or organization that pays a vendor for access to a specified range of the vendors services and/or content and is subject to terms and conditions agreed to with the vendor.	

Table 55. Subscriber

Field	Description	Additional Information
Normalized Subscriber	The normalized subscriber name	

Shared Dimensions with Other Subject Areas

None

16

Cost Usage

Using the Cost Usage area, the Design Analytics user may create reports/ dashboards for the Cost Usage area and is able to answer the following types of business questions:

- Most Expensive Journals/Electronic Collections
- Least Expensive Journals/Electronic Collections
- Title/Electronic Collection Cost per Use Annual Trends

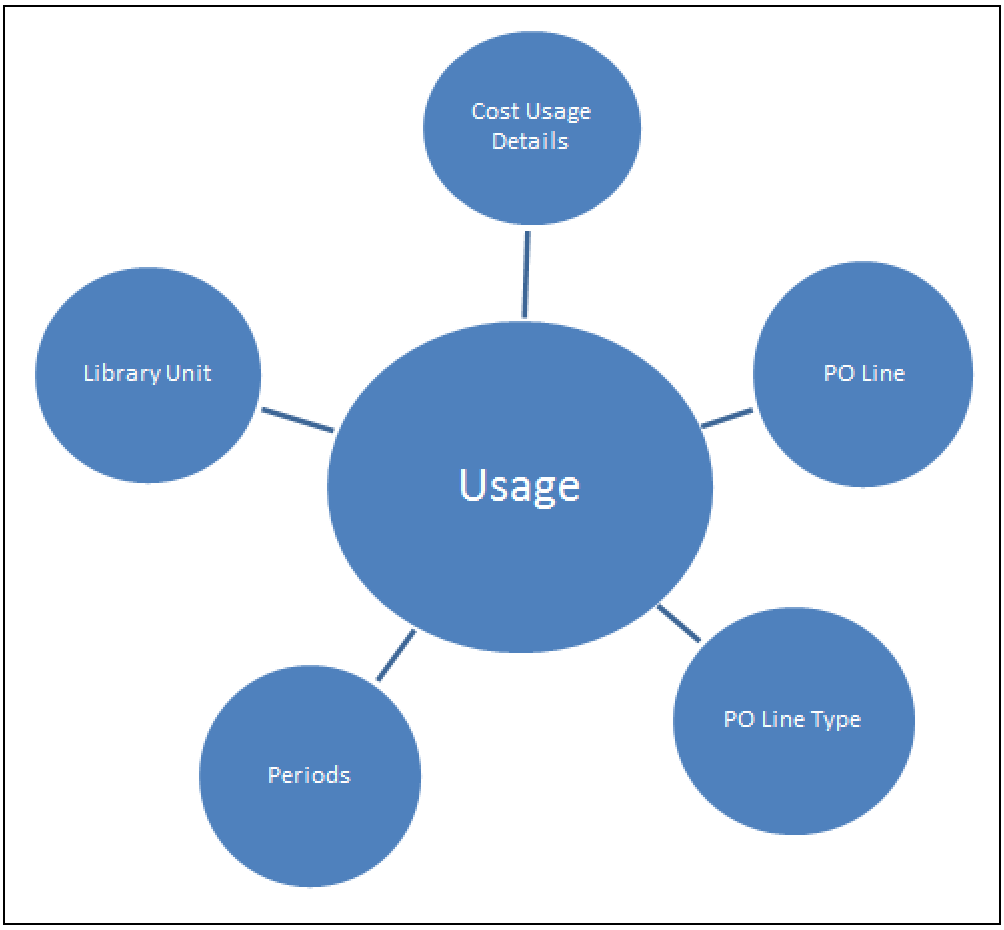


Figure 182: Star Diagram – Cost Per Use

Field Descriptions

The following lists the fields available in Cost Per Use.

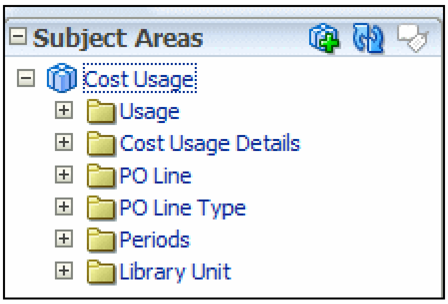


Figure 183: Cost Per Use

Usage

The Usage table is a fact table that stores all measures relating to a specific purchase per month. This table also holds details about the purchase, including Cost, Cost Per Use, and PO Line ID.

Table 56. Usage

Field	Description	Additional Information
Usage	Journals - The number of successful full text article requests by Month and Journal report	
Estimated Usage	Estimate for months without usage information	
Cost	Monthly price of po_line (annual cost / 12)	
Cost Per Use	Calculated field - cost/Estimated Usage	
PO Line ID	The ID of the PO line	

Cost Usage Details

The Cost Usage Details table is a dimension table that stores all measures relating to a specific purchase per month. This table also holds details about the purchase, including Title and ISSN.

Table 57. Cost Usage Details

Field	Description	Additional Information
ISSN	ISSN of the record	
Title	Title of the record	

PO Line

The PO Line table is a dimension table that stores details about the PO and the PO Line for which Cost Usage information is supplied. The primary key of the table PO_LINE_ID.

NOTE:
The field descriptions can be found in the PO Line shared dimension. For more information, see **PO Line** on page **115**.

PO Line Type

The PO Line Type table is a dimension table that stores details about the PO line type associated with the transaction. PO Line type determines the type of order created (one time/continuous_ and the type of inventory items that is created (E-Book, P-Journal, etc.). The primary key of the table is - PO_LINE_TYPE_ID with details taken from the POLINETYPE mapping table.

NOTE:
The field descriptions can be found under **PO Line Type** on page **159**.

Periods

The Periods table is a dimension table that stores details about the fiscal date of transactions, such as month, year, and quarter. Each transaction is associated with a fund and each fund is associated with a specific fiscal period.

NOTE:
The field descriptions can be found under **Transaction Dates** on page **149**.

Library Unit

The Library Unit table is a dimension table that stores details about the library where the PO Line was created. The primary key of the table is LIBRARYID.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

17

Fines and Fees

By using the Fines and Fees area, the Design Analytics user is able to create reports/dashboards for the Fine and Fees area. The user is able to display the following information:

- A list of all a user's cash transactions
- A list of all the open cash transactions by patron group
- A list of users that have fines and fees with their preferred address, phone, and email information
- A list of all the transaction types and amounts per library

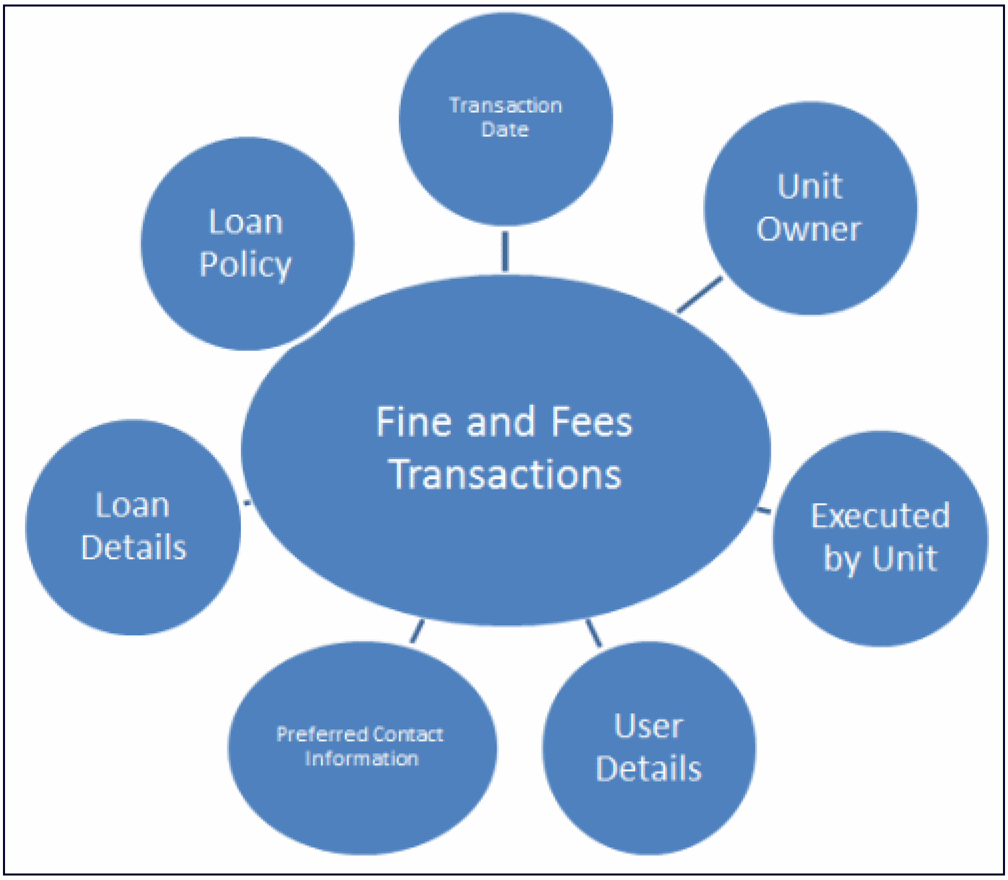


Figure 184: Star Diagram – Fines and Fees

Field Descriptions

The following lists the fields available in Fines and Fees.

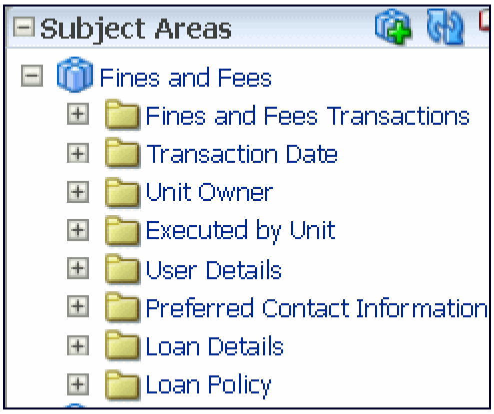


Figure 185: Fines and Fees – Field Descriptions

Fines and Fees Transactions

The Fines and Fees Transactions table is a fact table that stores all amount related to Fines and Fees Transactions. It also stores details of fines and fees including active, disputed, and transferred balance information. The primary key of the table is FINE_FEE_TRANSACTION_ID.

Table 58. Fines and Fees Transactions

Field	Description	Additional Information
Original Amount	Stores the original amount of the fine or fee	
Transaction Amount	Stores the amount of money that is associated with this transaction	
Transaction VAT	Stores the tax amount associated with the transaction	
Original VAT	Stores the original tax amount of the fine or fee	
Remaining Amount	Stores the amount of money remaining after subtracting the transaction amount from the original amount.	

Table 58. Fines and Fees Transactions

Field	Description	Additional Information
Original Amount - Not Sum (to be deprecated)	Stores the original amount of the fine or fee. **NOTE:** This field will be deleted in a future release.	
Fine Fee ID	Stores the unique identifier of the fine or fee	
Fine Fee Type	Stores the type of the fine or fee such as overdue loan fee or lost loan fee	
Fine Fee Transaction ID	Stores the unique identifier of the fine or fee transaction	
Fine Fee Transaction Type	Stores the type of fine or fee transaction such as paid or waived	
Fine Fee Status	Indicates whether or not the fine or fee is active	
Fine Comment	Stores the content of the comment associated with the fine or fee	
Item Loan ID	Indicates the associated item loan ID when the fine or fee is associated with a loan	
Item Title	Indicates the title of the loan when the fine or fee is associated with a loan	
Status Date	Stores the date that the fine or fee is created	
Payment Method	Indicates whether the payment was made by cash or credit	
Transaction Note	Stores the content of notes associated with fine or fee transactions	

Table 58. Fines and Fees Transactions

Field	Description	Additional Information
Transaction Reference Number	Stores the reference number of the fine or fee transaction	
External ID	Stores the ID of the fine or fee in the originating system	
Originating Loan ID	Stores the Loan ID from the originating system	
Original Currency	Stores the original currency	
Currency	Stores the actual currency of the fine and fee	
Fine Fee Creation Date	Stores the date that the fine and fee was created	
Fine Fee Created By ID	Stores the user ID of the Staff Operator who created the fine or fee transaction	
Fine Fee Creator	Stores the user name of the user that created the fine and fee	
Fine Fee Modification Date	Stores the modification date of the fine and fee	
Fine Fee Modified By	Stores the user name of the user that modified the fine and fee	
Fine Fee Transaction Creation Date	Stores the creation date of the fine and fee transaction	
Fine Fee Transaction Created By ID	Stores the user ID of the user that created the fine or fee transaction	
Fine Fee Transaction Creator	Stores the user name of the user that created the fine and fee transaction	
Fine Fee Transaction Modification Date	Stores the modification date of the fine and fee transaction	
Fine Fee Transaction Modified By	Stores the user name of the user that modified a previously existing fine and fee transaction	

Table 58. Fines and Fees Transactions

Field	Description	Additional Information
Waiving Reason Description	A description of the waiving reason	

Transaction Date

The Transaction Date table is a dimension table that stores details about the dates of fine and fee transactions such as month, year or quarter. Key fields may be used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- Calendar Fields – These are date fields as they display in the calendar.
- Fiscal Date Fields – These are date fields that match the institution's fiscal period. For the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user is able to drill down from year to month to the specific date on which the fine and fee transaction occurred. Measures such as transaction amount, original amount, etc., are accumulated to the relevant level in the hierarchy.

Table 59. Transaction Date

Field	Description	Additional Information
Date Key	Stores the fine and fee transaction date in a date format such as 2/29/2012	
See the same fields and descriptions as in **Loan Date** on page 180.		
Transaction Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific transaction date.	Using this column, a user may view the accumulative measures in each level of the hierarchy.

Unit Owner

The Unit Owner table is a dimension table that stores details about the library/ institution that created the fine and fee. The primary key of the table is ORGANIZATION_ID.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**

Executed by Unit

The Executed by Unit table is a dimension table that stores details about the library/institution that executed the transaction. The primary key of the table is LIBRARYID.

NOTE:
The field descriptions can be found in the Library Unit shared dimension. For more information, see **Library Unit** on page **125**

User Details

The User Details table is a dimension table that stores details about users with fines and fees. All fields are from the BI_DIM_USER table. The primary key of the table is USER_ID. The primary key of the table is USER_ID.

NOTE:
The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Preferred Contact Information

The Preferred Contact Information table is a dimension table that stores details about preferred contact information for users such as preferred address, phone, and email. The primary key of the table is USER_ID.

NOTE:
The field descriptions can be found under the Fulfillment subject area in **Preferred Contact Information** on page **187**.

Loan Details

The Loan Details table is a dimension table that stores additional details of a loan when fines and fees become associated with the loan. The primary key of the table is ITEM_LOAN_ID.

NOTE:
The field descriptions can be found under the Fulfillment subject area in **Loan Details** on page **174**.

Loan Policy

The Loan Policy table is a dimension table that store due-date policy details associated with fines and fees. The primary key is ITEM_LOAN_ID.

NOTE:
The field descriptions can be found under the Fulfillment subject area in **Loan Policy** on page **176**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

18

Events

Using the Events area, the Design Analytics user may create reports/dashboards that provide more details about events generated through Alma. Each time a cataloger creates, deletes, or updates an MMS record, for example, a new event is generated in Alma. By using the Events Subject Area, you can create an activity report and present how many new MMS records were created by each user.

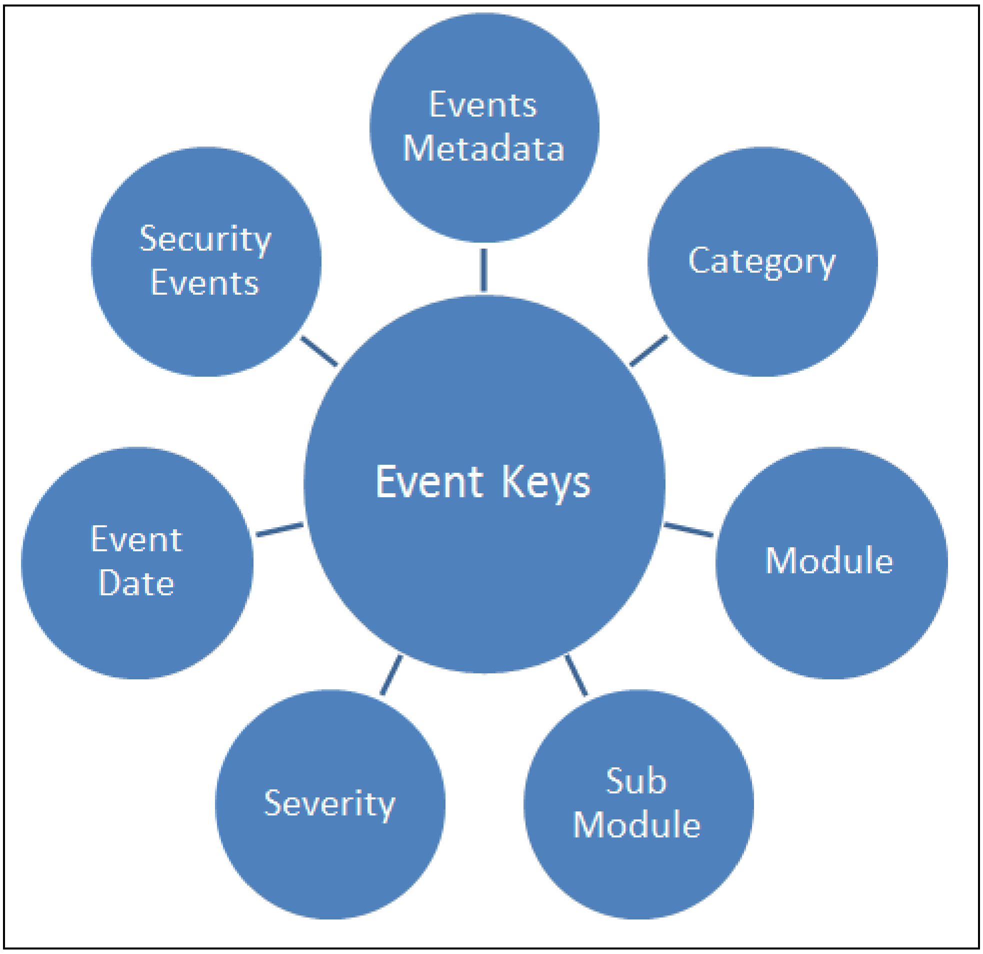


Figure 186: Events

Field Descriptions

The following lists the fields available in Events:

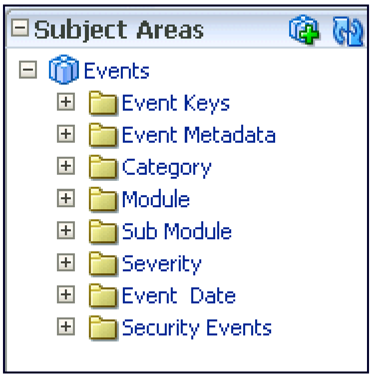


Figure 187: Events – Field Descriptions

Event Keys

The Event Keys table is a fact table that stores all events generated in Alma. It contains all keys and values associated with events.

Table 60. Event Key

Field	Description	Additional Information
Event ID	Stores the unique ID of the event	
Creator	Stores the creator of the event	
Event Duration	Stores the duration of the event in seconds	
Session ID	Stores the session ID to which the event was registered	
Key Name	Stores the key name	
Key Value	Stores the key value	
Num of Events	Stores the calculated fields that count all the unique events (by distinct event ID). Each event can have several entries in the table with different keys and values.	

Event Metadata

The Event Metadata table is a dimension table that stores additional details about the event. The primary key is EVENT_TYPE.

Table 61. Event Metadata

Field	Description	Additional Information
Event Type	Stores the event type	
Description	Stores the description of the event	
Is Enabled	Indicates if this event is recorded	
Message Description	Stores the message description with fillers for the parameters	
PURGE_POLICY	The number of months to save the event. Empty or 0 means that the event is never purged	

Category

The Category table is a dimension table that stores the category code and description of the event. The primary key is EVENT_TYPE.

Table 62. Category

Field	Description	Additional Information
Category Code	Stores the category code that the event associated with such as application, security, system, and administration	
Category Description	Stores the category description	

Module

The Module table is a dimension table that stores the module code and description of the event. The primary key is EVENT_TYPE.

Table 63. Module

Field	Description	Additional Information
Module Code	Stores the module code that the event associated with such as acquisition, inventory, migration, and repository	
Module Description	Stores the module description	

Sub Module

The Submodule table is a dimension table that stores the submodule code and description of the event. The primary key is EVENT_TYPE.

Table 64. Sub Module

Field	Description	Additional Information
Sub Module Code	Stores the submodule code that the event associated with such as currency, PDA cleanup, and purchase orders	
Sub Module Description	Stores the submodule description	

Severity

The Severity table is a dimension table that stores the severity code and description of the event. The primary key is EVENT_TYPE.

Table 65. Severity

Field	Description	Additional Information
Severity Code	Stores the severity code of the generated event such as error, fatal, information, and warning	
Severity Description	Stores the severity description	

Event Date

The Event Date table is a dimension table that stores details about the date of the event such a month, year, and quarter. Key fields may be used when calculations are required. Descriptions fields may be used for formatting the display of the report.

Using this dimension, users may drill down from year to month to the specific event. The number of events are accumulated to the relevant level in the hierarchy.

Table 66. Event Date

Field	Description	Additional Information
Date Key	Stores the event creation date in a date format such as 2/29/2012	
See the same fields and descriptions as in **Loan Date** on page **180**.		
Event Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific event date.	By using this column, it provides the user the option to view the accumulative measures in each level of the hierarchy.

Severity Events

The Severity Events table is a dimension table that stores details of severity events generated by Alma. This table stores events associated with CATEGORY=SECURITY and MODULE=USER_MANAGEMENT. Using this dimension, a user may create the FERPA (Family Educational Rights and Privacy Act) reports that indicates which users in Alma may view details of other users.

Table 67. Severity Events

Field	Description	Additional Information
Accessing User ID	Stores the user ID of the user that accessed other user information	
User ID	Stores the user ID of the user whose details have been seen	
User Accessing Operations	Describes the operation such as view, update, or delete that has been used to access the information	

Table 67. Severity Events

Field	Description	Additional Information
User Subentity List Name	Describes the entity that has been seen such as address, email, and so forth.	

Shared Dimensions with Other Subject Areas

None.

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Users

By using the Users area, the Design Analytics user is able to create reports/dashboards for the Users area. The user is able to get the following details:

- A list of all the users that are assigned to specific roles
- A list of users that have blocks
- A list of users with their preferred address, phone, and email that have fines and fees
- The number of users there are in each user group or user type
- A list of users and the notes associated with them

The user is able to select fields that are presented in one report from the User Details, Preferred Contact Information, and from only one of the following fields:

- Address
- Phone Number
- Email
- Identifier
- Block
- Note
- Role
- Campus Details
- User Statistics

The purpose for this limit is to avoid duplicate data when there is no meaning for instances where there may be more than one email address, physical address, identifier, etc.

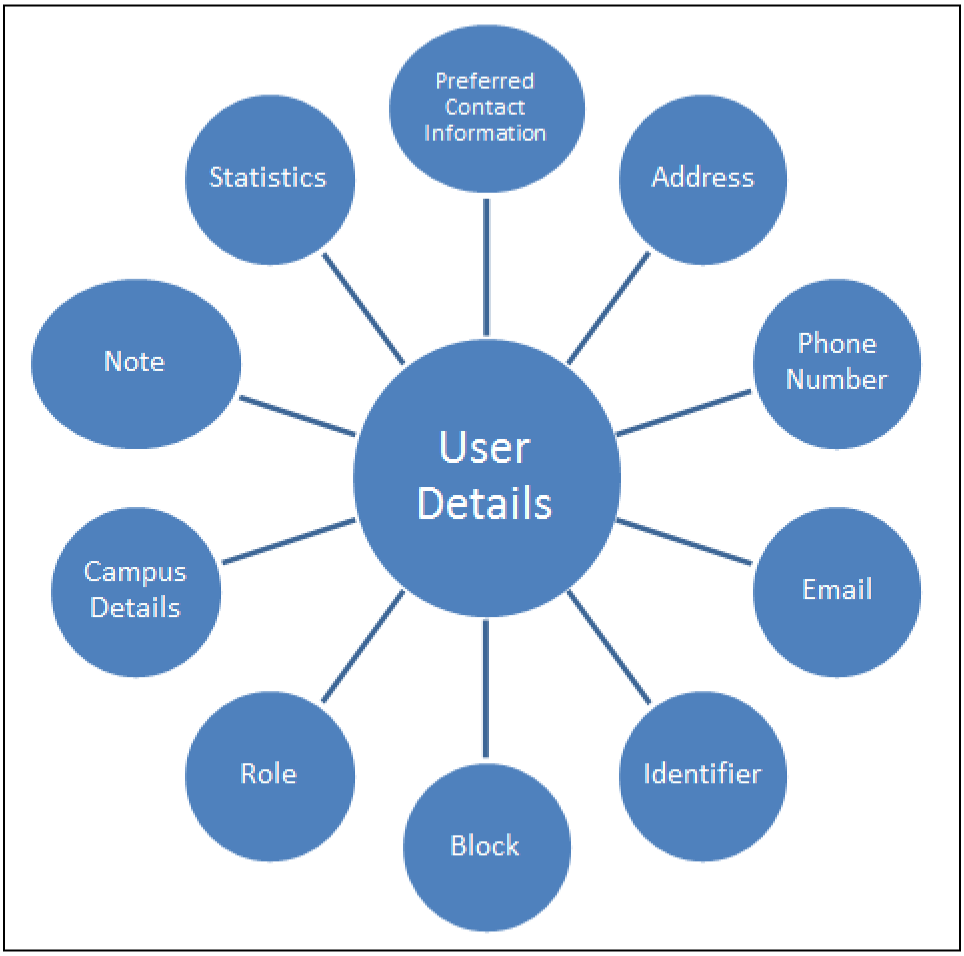

Figure 188: Star Diagram – Users

Field Descriptions

The following are the fields available in Users.

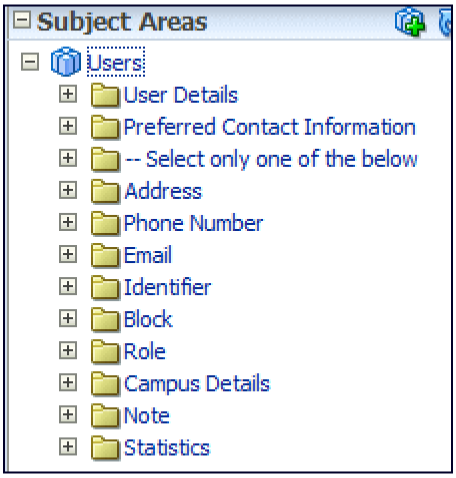

Figure 189: Users – Field Descriptions

User Details

The User Details table is a dimension table that stores the details about the Staff and Public users.

The User Details table is a dimension table that stores details about Staff and Public users. The primary key of the table is USER_ID.

NOTE:
The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Preferred Contact Information

The Preferred Contact Information table is a dimension table that stores details about preferred contact information for staff and public users including:

- Preferred address
- Preferred phone
- Preferred email
- Preferred SMS phone number

The primary key of the table is USER_ID.

NOTE:
The field descriptions can be found under the Fulfillment subject area section in **Preferred Contact Information** on page **267**.

Address

The Address table is a fact table that stores all address details of users. This table includes all addresses including the preferred one.

Table 68. Address

Field	Description	Additional Information
Line1	Stores the first line of the user's address	
Line2	Stores the second line of the user's address	
Line3	Stores the third line of the user's address	
Line4	Stores the fourth line of the user's address	
Line5	Stores the fifth line of the user's address	
City	Stores the city of the user's address	
Postal Code	Stores the postal code of the user's address	
Country	Stores the country of the user's address	
State Province	Stores the state or province of the user's address	
Address Type	Stores the type of address such as home, work, and so forth	
Is Preferred	Indicates if this is the preferred address for mail purposes	
Start Date	Stores the date from which this address is relevant	
End Date	Stores the date after which this address is no longer relevant	
Note	Stores a note regarding the users address	
External ID	Stores the ID of the user in the originating system	

Phone Number

The Phone Number table is a fact table that stores all the phone numbers of a user. This table includes all the phones numbers of a user including the preferred one.

Table 69. Phone Number

Field	Description	Additional Information
Is Preferred SMS	Indicates if this is the preferred number for SMS purposes	
Phone Number Type	Indicates the type of phone number such as home, mobile, office, fax, and so forth	
Is Preferred Phone Number	Indicates if this is the preferred number for calling purposes	
Phone Number	Stores the phone number	
External ID	Stores the ID of the user in the originating system	

Email

The email table is a fact table that stores all email addresses that are part of a user's record. It includes the preferred email address.

Table 70. Email

Field	Description	Additional Information
Email Type	Stores the email type: work, general, claim, etc.	
Email	Stores the email address	
Is Preferred	Indicates if this email address is the preferred one for contacting the user	
Description	Stores the description of the email	
External ID	Stores the ID of the user in the originating system	

Identifier

The Identifier table is a fact table that stores details of a user's different identifiers such as barcode, system ID, etc.

Table 71. Identifier

Field	Description	Additional Information
Identifier Status	Indicates whether the identifier is active or not	
Identifier Type	Indicates the type of the identifier. **NOTE:** The values come from the User Identifier Types code table.	
Identifier Value	Stores the identifier value	
Note	Stores the note associated with the identifier	
External ID	Stores the ID of the user in the originating system	

Block

The Block table is a fact table that stores detail of all blocks incurred by a user. Blocks are restrictions to a user's privileges that indicate that fines exceed limits, there are outstanding loans, repeated late book returns, etc.

Table 72. Block

Field	Description	Additional Information
External ID	Stores the ID of the user in the originating system	
Block Status	Indicates whether or not the block is active	
Block ID	Stores the block description as chosen from the predefined User Block Definitions mapping table	
Block Description	A description of the block.	

Table 72. Block

Field	Description	Additional Information
Block Type	Stores the block type as defined in the predefined User Block Definitions mapping table	
Note	Stores a note with additional details about a user's block	

Role

The Role table is a fact table that stores details of all roles of the user. User roles define a user's functions and privileges. Users may be assigned multiple roles.

Table 73. Role

Field	Description	Additional Information
Status Date	Stores the date from which this role is active	
Expiry Date	Stores the date after which this role is no longer active	
Status	Indicates whether or not the role is active	
Role Type	Stores the role that defines a set of permissions for functions that a user can perform in Alma	
Scope	Stores the institution or a specific library in which the role privileges are granted	
Scope Code	Stores the code of the scope in which the permissions are granted	
Internal Note	Stores a note regarding the user's role	
Library ID (to be deprecated)	Stores the identifier of the library in which the permissions are granted	This field will be deprecated in a future release.
Library Name (to be deprecated)	Stores the name of the library in which the permissions are granted	This field will be deprecated in a future release.

Campus Details

The Campus table is a dimension table that stores the details of the user's campus.

Table 74. Campus Details

Field	Description	Additional Information
Campus Name	Stores the name of the campus to which the user belongs	
Campus Desc	Stores the description of the campus to which the user belongs	
Campus Code	Stores the code of the campus to which the user belongs	

Note

The Note table is a fact table that stores details of all notes associated with a user. Notes, internal or otherwise, may be attached via the Notes tab. Depending on the note type (such as Address, Circulation, Library, Registrar, and so forth), these notes display in different parts of the system, usually in a fulfillment context.

Table 75. Note

Field	Description	Additional Information
Note Type	Stores the type of the note taken from a predefined code table	
Note	Stores the content of the note	
User Viewable	Indicates if you want the user to be able to view the note	
External ID	Stores the ID of the user in the originating system	

Statistics

The Statistics table is a fact table that stores details of all statistic categories associated with a user. Each institution can create several different user statistical categories. This enables the institution to better classify the different patrons in its system.

The user administrator defines the different statistical categories.

Table 76. Statistics

Field	Description	Additional Information
Statistical Category	Stores the code type of the note taken from a predefined code table	
Note	Stores the content of the note	
External Id	Stores the ID of the user in the originating system	

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

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Requests

Using the Requests subject area, the Design Analytics user may create reports and dashboards that help to answer the following types of business questions:

- How many items were requested per patron type?
- How many items were requested per material type?
- What is the fill rate for requests per material\patron type?
- How long does it take from the time that the request is placed until it is fulfilled?
- Which titles have the highest demand? (based on open requests)

Figure 190: Star Diagram – Requests

Field Descriptions

The following lists the fields available in Requests.

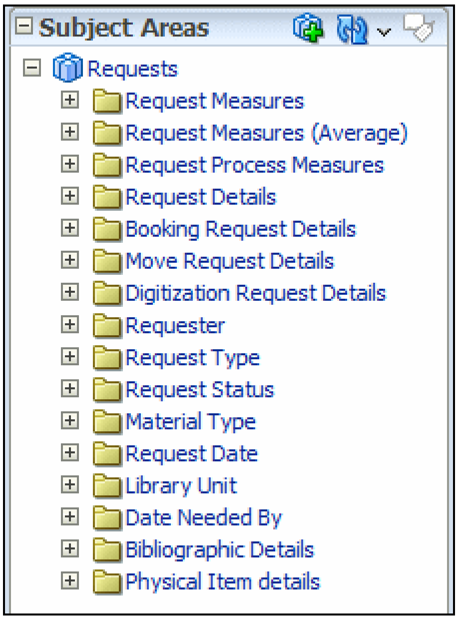


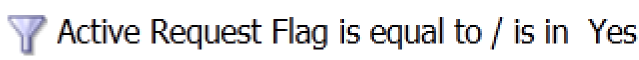
Figure 191: Requests – Field Descriptions

Report Creation Tips

Filtering Results Using the Active Request Flag

An active request is a request that is still in process, as opposed to a completed request which is no longer in process and can either be completed as fulfilled or as canceled.

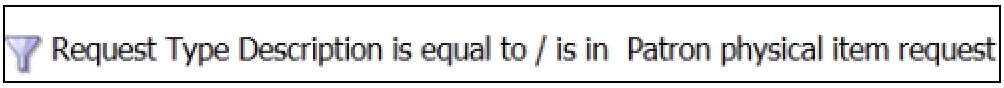
Typically you would run different reports for each population. For example - for active requests you can run a report on titles with high number of requests, and for completed requests you can run a trend analysis of average time to patron collection.



The Active Request Flag field is located in the Request Details folder.

Filtering Results Using the Request Type Description Flag

Requests in Alma are used for both internal processes (for example binding) as well as for patron facing processes. User this filter to narrow your results only to the type of requests in which you are interested.



The Request Type Description field is located in the Request Type folder.

Report on Items with High Requests

Since a request in Alma is done on the title level and not on the item level, there is no item information in the Requests subject area. An important need is to see titles with a high number of open requests and to be able to see for this title how many items are available in the library.

In order to do this, create two reports - one in the Requests SA and one in the Physical Items SA. The first report will be used as a sub-query for the second one.

To create a report of all titles with more than three open requests:

1. Select **New > Analysis** and then select **Subject Area > Requests**.
2. Create a report with the following columns, for example:
   - MMS ID (report must include a field common to the physical items SA in order to create the sub-query. MMS ID is a good candidate.)
   - # Requests
3. Filter the report using:
   - request type = Patron physical item request
   - # Request > x (in this example we used 3)
   - Active request = Yes

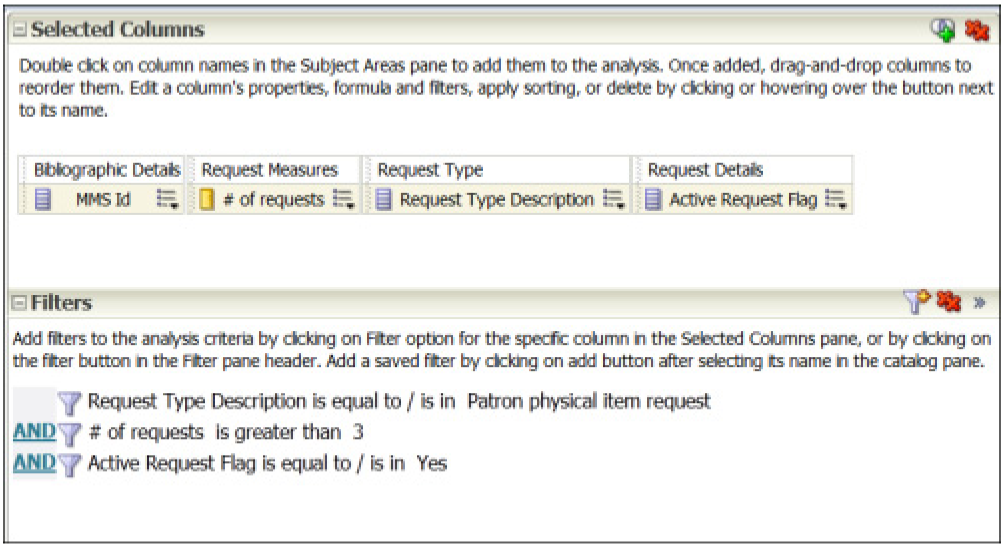


Figure 192: Report Criteria

4 Save the report.

5 Select **New > Analysis** and then select S**ubject Area > Physical Items**.

6 Create a report with the following columns, for example:

- MMS ID (this is must in order to use the filter on the requests)
- Title
- Num of Items
- Time loaned

7 Filter the MMS ID column using the following criteria:

- Operator – **is based on the results of another analysis**
- Saved Analysis – locate your previously saved report
- Relationship – **is equal to any**
- Use values in column – **MMS Id**

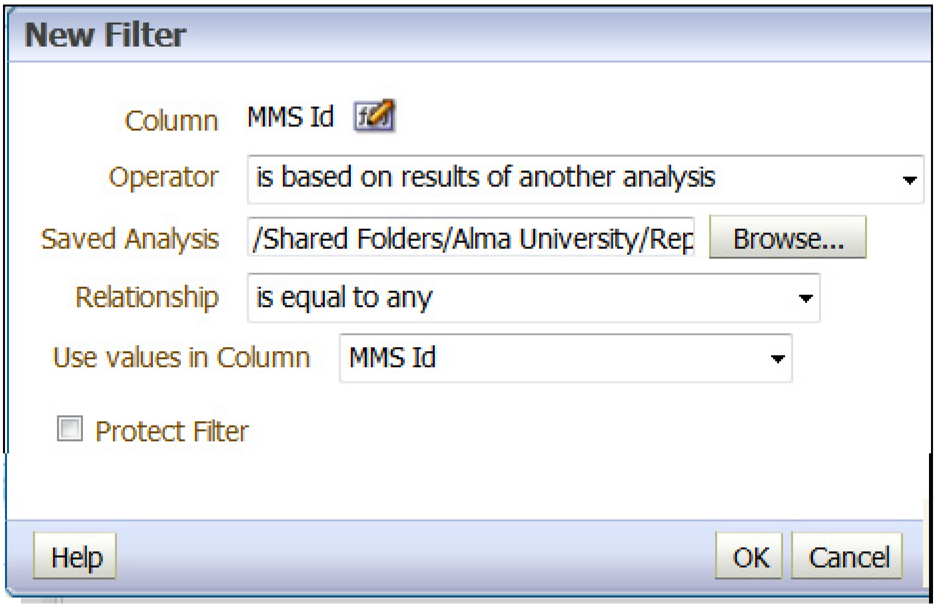


Figure 193: MMS ID Filter

The results of the report are titles that have more than three open request with the required item information. In this example, the number of copies and the times loaned.

MMS Id	Title	Num of Items	Time Loaned
-1		109	30
991101170000121	Corporate finance /	1	1
991112880000121	The Internet : the rough guide /	1	0
991120230000121	"Horses for courses" : the making of a post-Keynesian economist /	1	4
991120290000121	Birds of the tideline : shorebirds of the Northern hemisphere /	1	1
991132450000121	An axe, an apple, and a buckskin jacket; a Christmas story.	1	1
991139810000121	Memoir of Francis Baily, Esq. /	1	0

Figure 194: Titles With More Than 3 Open Requests

Request Measures

The Request Measures table is the fact table that stores all the measures (activities) of specific requests. The primary key is ID.

Table 77. Request Measures

Field	Description	Additional Information
# of Requests	The number of requests.	
Time to Available (Days/Hours)	The time between the request being placed and its becoming active.	For open requests that are not yet active, analytics calculates the total time until the current date.
Time to Process (Days/Hours)	The time between the request becoming active and its being placed on the shelf for pickup.	For open requests that are active but not yet on the shelf for pickup, analytics calculates the total time until the current date.
Time to Patron Collection (Days/Hours)	The time between the request being placed on the shelf for pickup and its being fulfilled.	For open requests that are placed on the shelf for pickup but are not yet fulfilled, analytics calculates the total time until the current date.
Total Request Time (Days/Hours)	The total amount of time between the request being placed and its being fulfilled.	For open requests, Alma Analytics will calculate the total time until this date.

Request Measures (Average)

The Request Measures (Average) table is a fact table that stores all the average of the measures (activities) of specific requests. The primary key is ID.

Table 78. Request Measures (Average)

Field	Description	Additional Information
Average Time to Available (Days/Hours)	The average time between the request being placed and its becoming active.	

Table 78. Request Measures (Average)

Field	Description	Additional Information
Average Time to Process (Days/Hours)	The average time between the request becoming active and its being placed on the shelf for pickup.	
Average Time to Patron Collection (Days/ Hours)	The average time between the request being placed on the shelf for pickup and its being fulfilled.	
Average Total Request Time (Days/Hours)	The average total amount of time between the request being placed and its being fulfilled.	

Request Process Measures

The Request Process Measures is a fact table that stores all the process measures (activities) of specific requests. The primary key is ID.

Table 79. Request Process Measures

Field	Description	Additional Information
Await Approval Time	The total amount of time that the request was in the Await Approval step. (The amount of time that the request waited for approval.)	
Deposit Item Time	The total amount of time that the request was in the Deposit Item step. (The time from when the digital material was ready to be deposited until the digital file was created.)	
Digitize Item Time	The total amount of time that the request was in the Digitize Item step. (The time from when the item was ready at the digitization department until it was digitized.)	

Table 79. Request Process Measures

Field	Description	Additional Information
Document Delivery Time	The total amount of time that the request was in the Document Delivery step. (The time from when the digital material was ready until it was delivered.)	
Hold Shelf Processing Time	The total amount of time that the request was in the Hold Shelf Processing step. (The time it took the library to make the item ready to be placed on the hold shelf.)	
On Hold Shelf Time	The total amount of time that the request was in the On Hold Shelf step. (The amount of time the item was on the hold shelf until it was either picked up or removed from the hold shelf.)	
Pickup from Shelf Time	The total amount of time that the request was in the Pickup from Shelf step. (The amount of time that it took for the staff to pick up the item from the shelving location.)	
Transit Item Time	The total amount of time that the request was in the Transit Item step. (The amount of time the item was in transit between circulation desks and libraries.)	
Waiting for Remote Storage Time	The total amount of time that the request was in the Waiting for Remote Storage step. (The amount of time that the request was waiting for the remote storage to provide an item to fulfill the request.)	
Work Order Department Time	The amount of time that the item was in the Work Order Department step. (The amount of time that the item was in the work order department.)	

Request Details

The Request Details table is a dimension table that stores details about the request. The primary key is ID.

Table 80. Request Details

Field	Description	Additional Information
Active Request Flag	An active request is a request that is still in process.	This flag is used to filter based on currently active requests (typically used for reports on titles with high demand) or completed requests (typically used for trend analysis and fill rate calculations).
Cancellation Reason	The cancellation reason inserted when a request is cancelled.	

Table 80. Request Details

Field	Description	Additional Information
Current Process	The name of the current activity.	Possible values are: ■ Await Approval – The request is waiting for approval. ■ Deposit Item – The digital material is ready to be deposited, but the digital file has not yet been created. ■ Document Delivery – The digital material is in the process of being delivered. ■ Requested – Handling the request has not started because an action must be performed. ■ On Hold Shelf – The item is on the hold shelf, but has not yet been picked up or removed. ■ Transit Item – The item is in transit between circulation desks and/or libraries. ■ Work Order – The item is in a work order. ■ Pickup From Shelf – The item has been picked up from the hold shelf. **NOTE:** For a list of the request statuses as they appear in Alma, see the **Creating a Request** section of the *Alma Fulfillment Guide*.
Creator	The creator of the request.	When the request is made by a staff user, this field contains the staff user's name. When it is created via Primo\API it contains the value `system`.

Table 80. Request Details

Field	Description	Additional Information
In Transit Flag	Indicates if the requested item is in transit.	
Manual Description	Contains a free text description. For multi-volume requests it describes the specific issue.	
Modification Date	The date that the request was modified.	
Modified By	The user that modified the request.	
No Pickup Flag	Refers to the first step of a request, which is to take the item from the shelf. Indicates that there is no need to take the item off the shelf.	
Note	The note entered by the user.	
Override on Shelf Request Policy	Indicates that the pickup location was chosen after overriding the default suggestions.	
Pickup Location	The pickup location of the requested item.	
Pickup Location Type	The pickup location type of the requested item.	
Pickup Slip Printed Flag	Indicates if a pickup slip was printed.	
Related to Resource Sharing Request	Indicates if the request is related to a resource sharing request.	
Request ID	The ID of the request.	
Search Type	Indicates whether the request is item level or title level.	
Status Note	The status note.	
Triggered Recall	Indicates if the request triggered a recall.	

Table 80. Request Details

Field	Description	Additional Information
Volume Issue	The volume and issue of the request for requests of specific volumes.	
Managed by Library (latest step)	Indicates which library managed the latest step of the request	
Managed by Unit (latest step)	Indicates which unit (department) managed the latest step of the request	
Managed by Desk (latest step)	Indicates which desk managed the latest step of the request	
Status (latest step)	The work order status of the latest step of the request	

VIDEO:

For a video describing the Managed By fields, see the *Analytics: Managed by Fields for Requests* video.

Booking Request Details

The Booking Request Details table is a dimension table that stores details about requests of type booking, and includes parameters relevant only to booking requests. The primary key is ID.

Table 81. Booking Request Details

Field	Description	Additional Information
Booking Start Time	The start time of the booking request.	
Booking End Time	The end time of the booking request.	
Booking Original Start Time	The original start time of the booking request.	
Booking Original End Time	The original end time of the booking request.	

Table 81. Booking Request Details

Field	Description	Additional Information
Override Booking Request Policy	The policy of the override booking request.	

Move Request Details

The Move Request Details table is a dimension table that stores details about move requests and includes parameters relevant only to move requests. The primary key is ORGANIZATION_ID.

Table 82. Move Request Details

Field	Description	Additional Information
Move Call Number	The call number of the item in the library to which the item is moved.	
Move Call Number Type	The call number type of the item in the library to which the item is moved.	
Move Due Back	The due back date of the item in the library to which the item is moved	
Move Item Policy	The item policy of the item in the library to which the item is moved	
See the same fields and descriptions as in **Loan Circulation Desk** on page 178 and **Item Location** on page 183.		

Digitization Request Details

The Digitization Request Details table is a dimension table that stores details about digitization requests and includes parameters relevant only to digitization requests. The primary key is CODE.

Table 83. Digitization Request Details

Field	Description	Additional Information
Approval Note	The approval note of the digitization request.	
Approval Status	The approval status of the digitization request.	
Requires Approval	Indicates if the digitization request requires approval.	
Requires Copyright Clearance	Indicates if the digitization request requires copyright clearance.	
Requires Deposit	Indicates if the digitization request requires a deposit.	
Reject Reason	The reject reason of the digitization request.	
Partial Digitization Flag	Indicates if the digitization request is full or partial.	
Patron Digitization Flag	Indicates if the patron made a digitization request.	

Requester

The Requester table is a dimension table that stores details about the requester. The primary key is USER_ID.

NOTE:
The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**.

Request Type

The Request Type table is a dimension table that stores details about the request type. The primary key is CODE.

Table 84. Request Type

Field	Description	Additional Information
Request Type Code	The request type code.	

Table 84. Request Type

Field	Description	Additional Information
Request Type Description	The type of request. Electronic Digitization Request, Move Permanently, Move Temporarily, Patron Physical Item Request, Patron	Possible values are: Binding, Booking Request, Patron Electronic Digitization Request, General Hold Request, Library

Request Status

The Request Status table is a dimension table that stores details about the request status. The primary key is CODE.

Table 85. Request Status

Field	Description	Additional Information
Request Status Code	The request status code.	

Table 85. Request Status

Field	Description	Additional Information
Request Status	The status of the request.	Values can be: ■ Ready – The request is still in the queue, not activated yet. Currently, there is no available item to fulfill the request. ■ Active – The request is activated and there is an available item to fulfill the request. ■ Rejected – The operator canceled an activated request from Alma. ■ Complete – The request is completed (for example, for hold requests, when the item is loaned). ■ Rejected by Library – The request is canceled. The cancellation reason is `Canceled at patron's request.` ■ Rejected by Patron – The request is canceled. The cancellation reason is `Patron no longer interested.`

Material Type

The Material Type table is a dimension table that stores details about the material type. The primary key is CODE.

Table 86. Material Type

Field	Description	Additional Information
Material Type Code	The material type code.	

Table 86. Material Type

Field	Description	Additional Information
Material Type Description	The material type specified in the request.	Values can be: Audiobook, Audio cassette, Book, Compact Disc, Flash Card, Bound Issue, Issue, DVD, and Other.

Request Date

The Request Date table is a dimension table that stores details about the request date. The primary key is DATE_KEY.

Table 87. Request Date

Field	Description	Additional Information
Request Date Month	The month of the request.	For example: January, February).
Request Date Month Key	The month key of the request (for example: 1, 2, 3).	This field is recommended if you want to sort by month.
Request Full Month	The month and the year of the request.	For example: January 2014).
Request Date Quarter	The quarter of the request.	For example: Q1, Q2.
Request Date Year	The year of the request.	For example: 2014.
Request Date	The date of the request.	

Library Unit

The Library Unit table is a dimension table that stores details about the library unit. The primary key is DATE_KEY.

NOTE:
The field descriptions can be found under the Library Unit shared dimension. For more information, see **Library Unit** on page **125**.

Date Needed By

The Date Needed By table is a dimension table that stores details about the date needed by. The primary key is DATE_KEY.

Table 88. Date Needed By

Field	Description	Additional Information
Date Needed Month	The month of the date that the request is needed.	
Date Needed Month Key	The month key of the date that the request is needed.	
Date Needed Full Month	The full month of the date that the request is needed.	
Date Needed Quarter	The quarter of the date that the request is needed.	
Date Needed Year	The year of the date that the request is needed.	
Date Needed Date	The date that the request is needed.	

Bibliographic Details

The Bibliographic Details table is a dimension table that stores details about the bibliographic details. The primary key is MMS_ID.

NOTE:
The field descriptions can be found under the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.

Physical Item Details

The Physical Item Details table is a dimension table that stores details about the physical item details. The primary key is ITEM_ID.

Table 89. Physical Item Details

Field	Description	Additional Information
Library ID	The ID of the library.	
MMS ID	The MMS ID of the library.	
PO Line ID	The ID of the PO line.	
See the same fields and descriptions as in **Physical Item Details** on page **207** and **Holding Details** on page **210**.		

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.

21

Course Reserves

Using the Course Reserves area, the Design Analytics user may create reports/dashboards for the Course Reserves area and is able to answer the following types of business questions:

- How many times were items that are linked to a reserved title loaned?
- Which courses reserved a specific title?
- Which courses share the same titles?
- What are the reading lists per department?

VIDEO:

For a video concerning Course Reserves, see the *Course Reserves Subject Area* video.

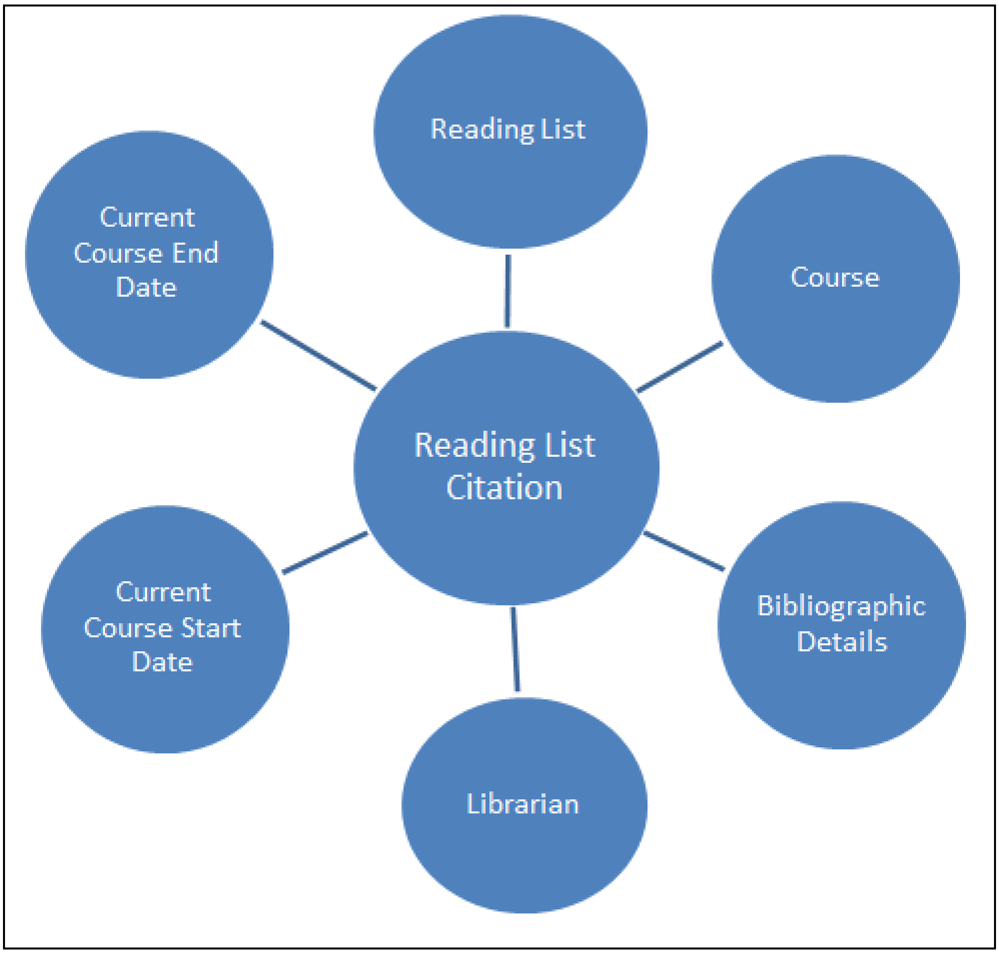


Figure 195: Star Diagram – Course Reserves

Field Descriptions

The following lists the fields available in Course Reserves.

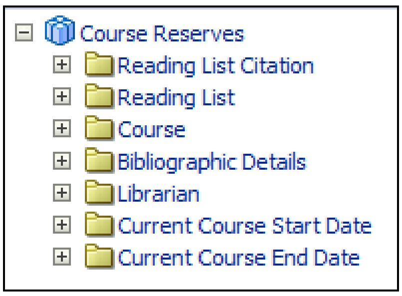


Figure 196: Course Reserves

Reading List Citation

The Reading List Citation table is a fact table that stores the measure relating to number of citations. This table also holds details about the citation, including citation creator, citation status, and citation type. The primary key of the table is CITATION ID.

Table 90. Reading List Citation

Field	Description	Additional Information
Number of Citations	The number of citations in the reading list	
Citation ID	The ID of the citation	
Citation Creator	The creator of the citation	
Citation Create Date	The date the citation was created	
Citation Modified By	The person who modified the citation	
Citation Modification Date	The citation modification date	
Citation Status	The status of the citation	
Is Repository Citation	Indicates if the citation is linked to the repository	
Citation Type	The citation type.	Possible values are: ■ Physical Book ■ Physical Article ■ Electronic Article
Citation Locate Status	Indicates if the resource is located.	

Reading List

The Reading List table is a dimension table that stores details relating to a reading list, including the reading list name, the reading list status, and the reading list creation date. The primary key of the table is READING_LIST_ID.

Table 91. Reading List

Field	Description	Additional Information
Reading List Code	The code of the reading list	
Reading List Name	The name of the reading list	
Reading List Owner	The owner of the reading list	
Reading List Status	The status of the reading list	
Reading List Due Back Date	The due back date of the reading list	
Reading List Creator	The creator of the reading list	
Reading List Create Date	The date that the reading list was created	
Reading List Modified By	The person who modified the reading list	
Reading List Modification Date	The date that the reading list was modified	

Course

The Course table is a dimension table that stores details about the Course, including the course name, the course year, and the course creator. The primary key of the table is COURSE_ID.

Table 92. Course

Field	Description	Additional Information
Course Code	The code of the course	
Course Name	The name of the course	
Course Status	The status of the course	
Course Year	The year of the course	
Course Term	The term of the course	
Academic Department	The academic department of the course	
Processing Department	The processing department of the course	

Table 92. Course

Field	Description	Additional Information
Number of Participants	The number of participants in the course	
Weekly Hours	The weekly hours of the course	
Searchable ID 1-3	Searchable ID 1-3 of the course	
Course Creator	The creator of the course	
Course Modified By	The person who modified the course	
Course Modification Date	The date that the course was modified	
Course Section	The section of the course	
Course Create Date	The date that the course was created	

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details of the course reserve. The primary key of the table is BIB_ID.

NOTES:

- The field descriptions can be found in the Bibliographic Details shared dimension. For more information, see **Bibliographic Details** on page **111**.
- Title and other bibliographic details of non-repository citations are not displayed in analytics reports, although the title is displayed in Alma.

Librarian

The Librarian table is a dimension table that stores details about the librarian, including User ID, campus code, and job title. The primary key of the table is USER_ID.

NOTE:

The field descriptions can be found in the User Details shared dimension. For more information, see **User Details** on page **130**

Current Course Start Date

The Current Course Start Date is a dimension table that stores details about the current course start date. The primary key of the table is COURSE_START_DATE.

Table 93. Current Course Start Date

Field	Description	Additional Information
See similar fields and descriptions as in **Transaction Dates** on page **149**.		
Current Course Start Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific current course start date. This column provides the user the option to view the cumulative measures in each level of the hierarchy.	This corresponds to the **Start date** in **Fulfillment > Course Reserves > Courses**.

Current Course End Date

The Current Course End Date is a dimension table that stores details about the current course end date. The primary key of the table is COURSE_END_DATE.

Table 94. Current Course End Date

Field	Description	Additional Information
See similar fields and descriptions as in **Transaction Dates** on page **149**.		
Current Course End Date	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific current course end date. This column provides the user the option to view the cumulative measures in each level of the hierarchy.	This corresponds to the **End date** in **Fulfillment > Course Reserves > Courses**.

Shared Dimensions with Other Subject Areas

For information concerning shared dimensions with other subject areas, see **Shared Dimensions** on page **111**.