Bibliographic records with no inventory and holdings records with no items

Yoel Kortick. Senior Librarian
Introduction

Titles subject area reports and fields

Physical items subject area reports and fields

Titles subject area examples

Physical items subject area examples
Introduction

• Now (as of May 2018) it is possible to retrieve and display in Alma Analytics reports:

1. Bibliographic records with no inventory
2. Holdings records with no items

• This is possible in two different subject areas:

1. Titles
2. Physical Items
Introduction

Titles subject area reports and fields

Physical items subject area reports and fields

Titles subject area examples

Physical items subject area examples
The folder ‘shared/Alma/Titles/Reports’ now has three new default reports:

1. Bibliographic records with holdings record and no items
2. Bibliographic records with no inventory of any type
3. Inventory breakdown
The folder ‘shared/Alma/Titles/Reports’ now has three new default reports:

- **Bibilographic records with holdings record and no items**
- **Bibilographic records with no inventory of any type**
- **Inventory Breakdown**
The ‘Titles’ subject area "Title Measures" folder includes new measures on the number of holdings records.
Titles subject area new fields

• The ‘Titles’ subject area "Title Details" folder includes new measures on the number of holdings records.
Introduction

Titles subject area reports and fields

Physical items subject area reports and fields

Titles subject area examples

Physical items subject area examples
Physical Items subject area new default reports

• The folder ‘shared/Alma/Inventory/Reports’ now has a new default report:

• Holdings records with no active items
Physical Items subject area new default reports

- The folder ‘shared/Alma/Inventory/Reports’ now has a new default report:
The ‘Physical Items’ subject area "Physical item details" folder includes two new measures on the number of items:

1. Num of Items (In Repository)
2. Num of Items (Deleted + In Repository)

This is instead of having only one measure "Num of Items" which would by default automatically include both items deleted and items in the repository.
Physical Items subject area new fields

- The ‘Physical Items’ subject area "Physical items details" folder includes two new measures on the number of items:
Physical Items subject area new fields

• The ‘Physical Items’ subject area "Holdings details" folder includes a new measure: "Has Active Items"

• The new analytics field "Has Active Items" is like the field in Alma search "Has Items"
Physical Items subject area new fields

• The ‘Physical Items’ subject area "Holdings details" folder includes a new measure:

• Has Active Items
Introduction

Titles subject area reports and fields

Physical items subject area reports and fields

Titles subject area examples

Physical items subject area examples
• The report ‘shared/Alma/Titles/Bibliographic records with holdings record and no items’ retrieves bibliographic records with no items and at least one non deleted holdings record.
Titles subject area examples

Bibliographic records with holdings record and no items
• It filters by:

"Bibliographic Details"."Lifecycle" = 'In Repository'
AND
"Title Measures"."Num of Physical Items (Active)" = 0
AND
"Title Measures"."Num of Holdings (Active)" >= 1
### Titles subject area examples

Bibliographic records with holdings record and no items

- We will look at the first example "Ultrasonic imaging"

<table>
<thead>
<tr>
<th>MMS ID</th>
<th>Title</th>
<th>Summary Holding</th>
<th>Num of holdings (active)</th>
</tr>
</thead>
<tbody>
<tr>
<td>994325723502341</td>
<td>Ultrasonic imaging</td>
<td>v. 15:no. 1 (1993:Jan.)-v. 18:no. 4 (1996:Oct.)</td>
<td>1</td>
</tr>
</tbody>
</table>
Titles subject area examples

Bibliographic records with holdings record and no items

- It has a holdings record and no items.
- The summary holdings also appeared in the analytics report
• The report ‘shared/Alma/Titles/Bibliographic records with no inventory of any type’ retrieves bibliographic records with no items, no portfolios, no electronic collections, no digital representations, no holdings, and is not deleted.
Titles subject area examples

Bibliographic records with no inventory of any type
Bibliographic records with no inventory of any type

- It filters by:

  "Title Measures"."Num of Physical Items (Active)" = 0
  AND
  "Title Measures"."Num of Portfolios (Active)" = 0
  AND
  "Title Measures"."Num of Electronic Collections (Active)" = 0
  AND
  "Title Measures"."Num of Digital Representations (Active)" = 0
  AND
  "Bibliographic Details"."Lifecycle" = 'In Repository'
  AND
  "Title Measures"."Num of Holdings (Active)" = 0
We will look at the first example "Basic water monitoring program"
Titles subject area examples

Bibliographic records with no inventory of any type

- It has no inventory of any type

Example:

Basic water monitoring program / developed by the Standing Work Group on Water Monitoring.


Series: EPA (Series) ; 440/9-76-025.

Language: English
Record number: ocm03530219
Update Date: 12/07/2017

Physical  Electronic  Digital  Other details
• The report ‘shared/Alma/Titles/Inventory Breakdown’ displays how much of each inventory type the institution has. The filters are as follows:

  • **Number of active titles** = "Title Measures"."Num of Titles (Active)"

  • **Number of titles with active physical items** = FILTER("Title Measures"."Num of Titles (Active)" USING ("Title Details"."Has Active Physical Items" = 'Yes'))

  • **Number of titles with active physical items or holdings records** = FILTER("Title Measures"."Num of Titles (Active)" USING ("Title Details"."Has Active Physical Items" = 'No') AND ("Title Details"."Has Active Holdings Records" = 'Yes'))

  • **Number of titles with active portfolio** = FILTER("Title Measures"."Num of Titles (Active)" USING ("Title Details"."Has Active Electronic Portfolios" = 'Yes'))

  • **Number of titles with active holdings records and no items** = FILTER("Title Measures"."Num of Titles (Active)" USING ("Title Details"."Has Active Electronic Collections" = 'Yes'))

  • **Number of titles with active electronic collection** = FILTER("Title Measures"."Num of Titles (Active)" USING ("Title Details"."Has Active Electronic Collections" = 'Yes'))

  • **Number of titles with active digital representation** = FILTER("Title Measures"."Num of Titles (Active)" USING ("Title Details"."Has Active Digital Representations" = 'Yes'))
Titles subject area examples

Inventory Breakdown
Titles subject area examples

Inventory Breakdown

Number of active titles: 1,160,367
Number of titles with active physical items: 388,750
Number of titles with active portfolio: 388,774
Number of titles with active physical items or holdings records: 760,282
Number of titles with active holdings records and no items: 24
Number of titles with active electronic collection: 367
Number of titles with active digital representation: 6,700
Introduction

Titles subject area reports and fields

Physical items subject area reports and fields

Titles subject area examples

Physical items subject area examples
Physical items subject area examples

- The report ‘Shared/Alma/Inventory/Holdings records with no active items’ retrieves bibliographic records with no items and at least one non deleted holdings record.

- This it is similar to ‘shared/Alma/Titles/Bibliographic records with holdings record and no items’ but it is coming from a different subject area this possible to display with different data.
• Note the subtle difference between these two reports:

• Shared/Alma/Inventory/Holdings records with no active items
  This a list of holdings records which do not have any items. It is possible that
  the bibliographic record listed has two holdings record: one with items and
  one without. The focus here is on the holdings record. (this is the "Physical
  Inventory" subject area).

• Shared/Alma/Titles/Bibliographic records with holdings record and no
  items
  This is a list of bibliographic records that have at least one active holding
  record and the bibliographic record has no items. The focus is on the
  bibliographic record (this is "Titles" subject area).
Physical items subject area examples

Holdings records with no active items
Physical items subject area examples

- Holdings records with no active items

- It filters by:

  "Physical Item Details"."Num of Items (In Repository)" = 0
  AND
  "Holding Details"."Holding Lifecycle" = 'Active'
Physical items subject area examples

Holdings records with no active items

- We will look at the first example "Ireland in books, 1945"
Physical items subject area examples

Holdings records with no active items

- It has a holdings record and no items.
Thank You
Yoel.Kortick@exlibrisgroup.com