



# Purchase Requests in Alma Analytics

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- Introduction
- Viewing a small selection of the many default reports
- List of all default reports with explanation



# Introduction

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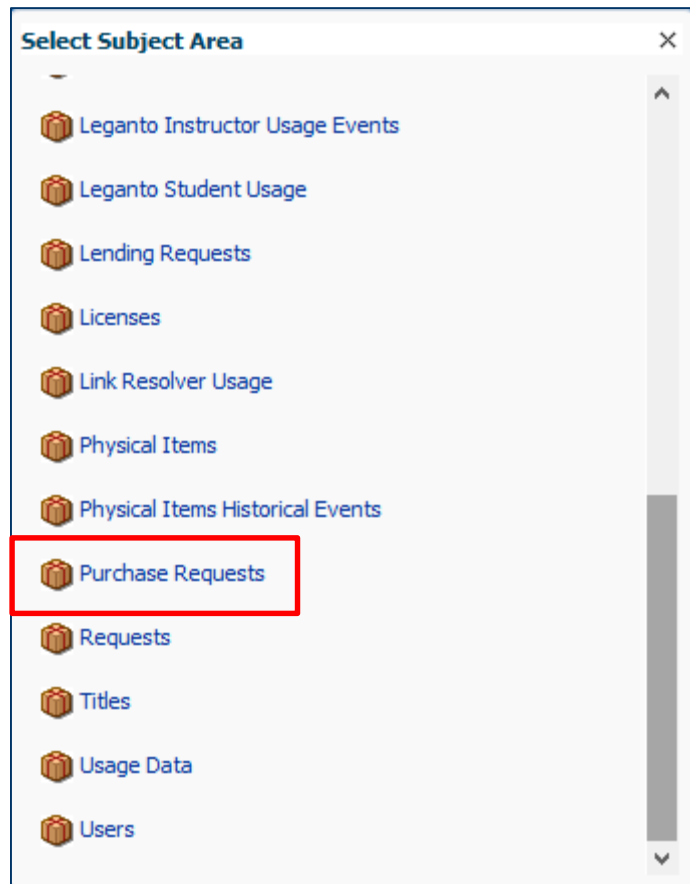
- The September 2019 release of Alma includes a new dedicated subject area for purchase requests.
- The November 2019 release of Alma includes a set of default reports for purchase requests as well as a dashboard
- The default List of all default reports with explanations are located under directory "Shared Folders / Alma / Purchase Requests"

# Introduction

- With this new subject area institutions can report on purchase requests thereby identifying which users are creating what kinds of requests in which areas. This can be a valuable component in determining collection management.
- As we will see, this new subject area includes data on the bibliographic record, the creator, user to whom it is assigned, the status of the request, and a myriad of predefined measures.
- When the purchase request results in a POL then the POL number is also included and can then be used as an input in other subject areas.

# Introduction

New subject area for  
Sept. 2019



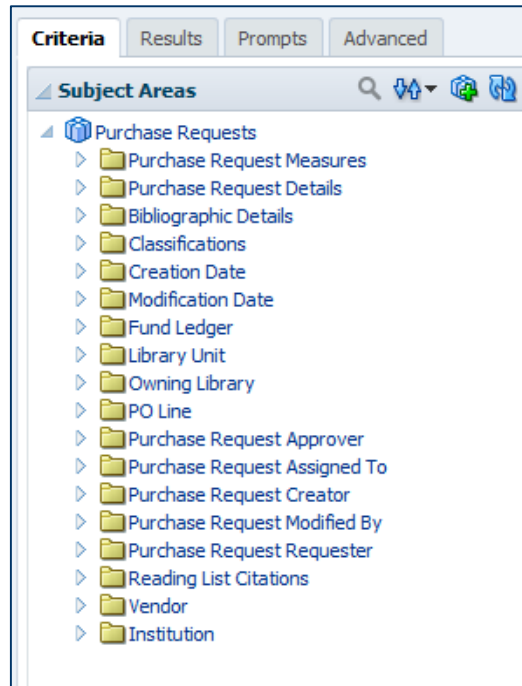
# Introduction

The screenshot displays a file explorer interface. On the left, a tree view shows the folder structure under 'Shared Folders' > 'Alma'. The 'Purchase Requests' folder is highlighted with a red box. On the right, a list view shows folders: 'Dashboards', 'Prompts', and 'Reports'. Each folder has an 'Expand | More' link. The 'Dashboards' and 'Reports' folders are highlighted with red boxes. A text box in the lower right of the interface contains the text: 'New set of default List of all default reports with explanation for Nov. 2019'.

Type	Name	Last Modified	Owner
Folder	Dashboards	6/18/2019 9:27:31 AM	Owner
Folder	Prompts	6/18/2019 9:27:39 AM	Owner
Folder	Reports	6/18/2019 9:27:45 AM	Owner

# Introduction

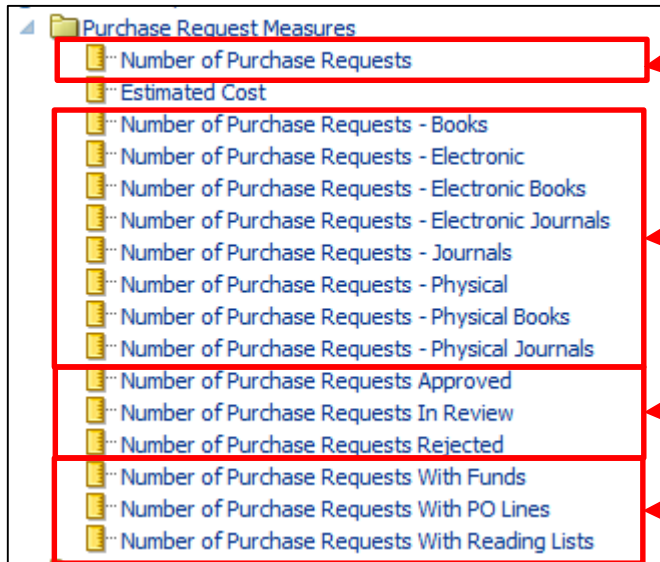
- The Purchase Requests Subject Area





# Introduction

- Purchase Request Measures exist for all aspects of the Purchase Requests
- Measures are prefiltered by various attributes



- Number of purchase requests with no predefined filter

- Citation type can be "Book" or "Journal"
- Request format can be "Electronic" or "Physical"
- Here we have every possible combination

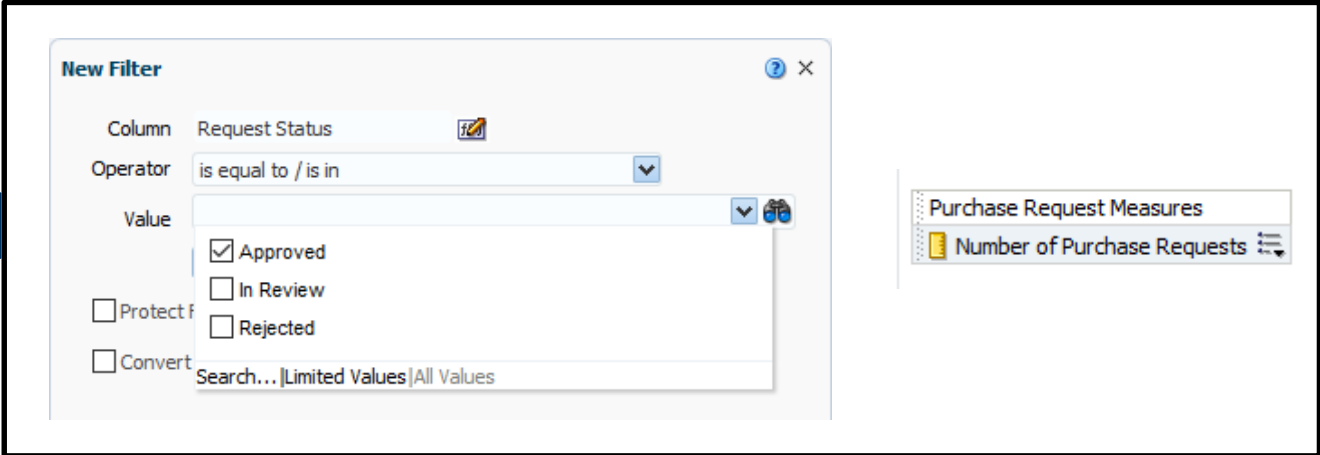
- Status can be "Approved", "In Review" or "Rejected"

- Purchase requests may be connected to Funds, PO Lines and Reading Lists

# Introduction

- For example instead of filtering by "request status = approved" and displaying the "Number of Purchase requests" it is possible to use the predefined filter "Number of Purchase Requests Approved"

Instead of this

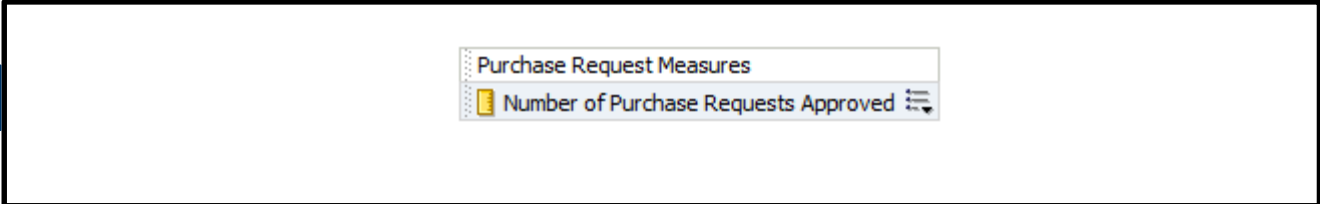


The screenshot shows a 'New Filter' dialog box with the following configuration:

- Column: Request Status
- Operator: is equal to / is in
- Value:  Approved,  In Review,  Rejected
- Additional options:  Protect f,  Convert
- Search... | Limited Values | All Values

To the right of the dialog is a dropdown menu for 'Purchase Request Measures' with 'Number of Purchase Requests' selected.

Can use this



The screenshot shows a dropdown menu for 'Purchase Request Measures' with 'Number of Purchase Requests Approved' selected.



## Viewing a small selection of the many default reports

# Viewing a small selection of the many default reports

- On the next slide we have a report of Purchase Requests which have been assigned to a user but not updated for at least 30 days.
- This can be used as an alert for the institution to take care of neglected purchase requests.
- It filters by
  - Modification date is equal or greater than 30 days ago
  - Assignee is not empty
  - Request status is not approved or rejected

# Viewing a small selection of the many default reports

## Purchase Requests - Assigned and Not Updated within the Last 30 Days Details

Purchase Requests Not Updated in the Last 30 days: 31

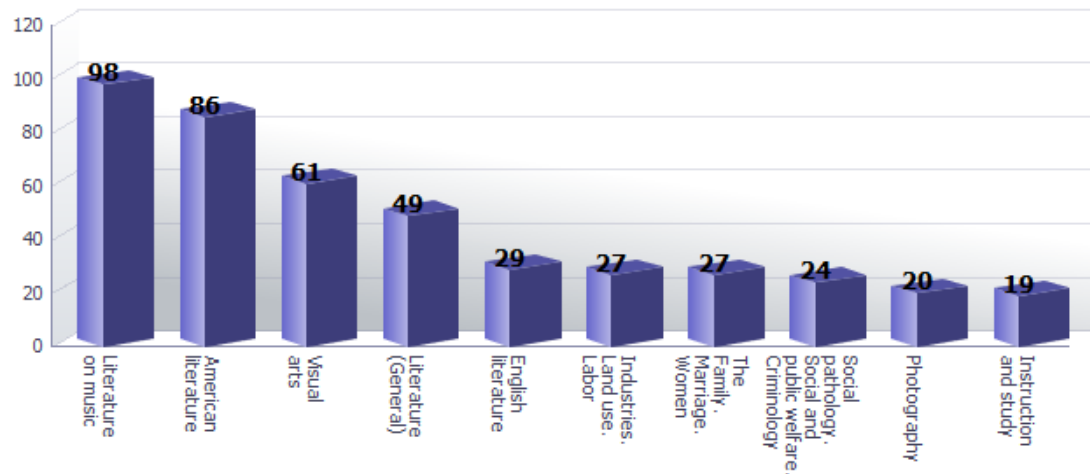
Assigned To Primary Identifier	Requester Primary Identifier	Requested Format	Citation Type	Title	Creation Date	Modification Date
2480195913	2482303651	Physical	BOOK	Uri nŭn ɔ̃njena sɔ̃ng e saratta =	6/5/2019	6/5/2019
				Wanggawi :	6/5/2019	6/5/2019
2480302365	2482536513	Physical	BOOK	Oakland post.	11/7/2017	7/17/2018
	2483195534	Physical	BOOK	The Interior (1891-1910)	5/1/2017	7/17/2018
	2483212225	Physical	BOOK	Zoologica scripta	5/28/2017	5/30/2017
2481365031	2481136513	Physical	BOOK	Externalizing Migration Management: Europe, North America, and the spread of 'remote control' practices. Edited by Rube Zaiotti,	8/5/2018	8/29/2018
				Muslim Cool: Race, Religion, and Hip Hop in the United States	7/15/2018	7/19/2018
				On Christopher Street :	3/27/2019	3/28/2019
				Representing women	3/24/2019	3/28/2019
	2481136536	Physical	JOURNAL	Encyclopedia of multicultural psychology	1/24/2019	1/24/2019
	2481365031	Physical	BOOK	Designing the future :	6/17/2019	6/17/2019
	2481553651	Physical	BOOK	Women in Turkey : silent consensus in the age of neoliberalism and Islamic conservatism	2/4/2019	2/4/2019
	2482024830	Physical	BOOK	Basics of Keyboard Theory	5/29/2019	5/29/2019
	2482113651	Physical	BOOK	Body Learning, Second Edition.	4/4/2019	4/4/2019
	2482248365	Physical	JOURNAL	Topia : Canadian journal of cultural studies.	4/22/2018	4/23/2018
	2483024835	Physical	BOOK	Tobacco control.	1/26/2019	1/28/2019
	2483094450	Physical	JOURNAL	The psychoanalytic study of the child.	5/15/2018	5/15/2018
	2483124820	Physical	BOOK	Terapia Familiare: Rivista Interdisciplinare di Ricerca e Intervento Relazionale	10/5/2018	10/10/2018
2483136513	Physical	JOURNAL	Psychoanalysis and history.	2/8/2019	2/11/2019	
2483190310	Physical	BOOK	ProtoView	1/25/2019	1/25/2019	

# Viewing a small selection of the many default reports

- On the next slide we have a report of Top 10 Requested LC Groups Requests Created in Last 365 Days
- This is useful for collection development, identifying what subject area are in highest request by users.
- It filters by
  - Creation date filter is in last 365 days
- It displays measure
  - Number of Purchase Requests
  - LC Classification Group
  - LC Classification Code

# Viewing a small selection of the many default reports

Purchase Requests - Top 10 Requested LC Groups Requests Created in Last 365 Days



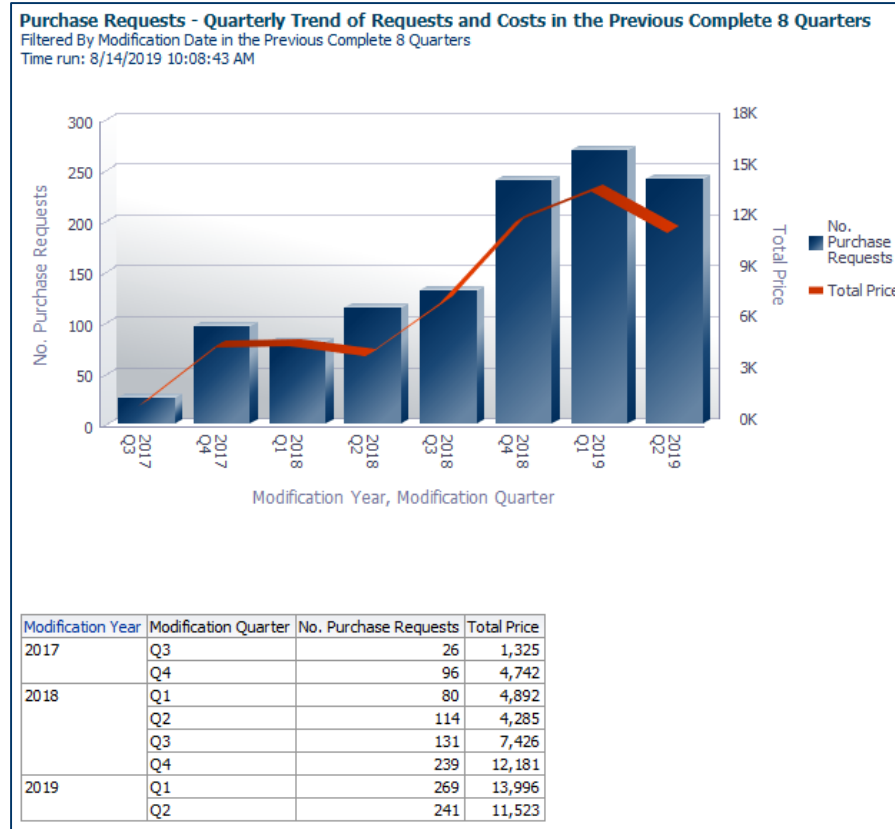
Classification Code	LC Group 1	No. Purchase Requests
ML	Literature on music	98
PS	American literature	86
N	Visual arts	61
PN	Literature (General)	49
PR	English literature	29
HD	Industries, Land use, Labor	27
HQ	The Family, Marriage, Women	27
HV	Social pathology, Social and public welfare, Criminology	24
TR	Photography	20
MT	Instruction and study	19
<b>Grand Total</b>		<b>440</b>

# Viewing a small selection of the many default reports

- On the next slide we have a report of Quarterly Trend of Requests and Costs in the Previous Complete 8 Quarters
- We can see for example that there has been a steady increase in the number of purchase requests and corresponding total price.
- It filters by
  - Creation date > 8 complete quarters ago
- It displays measures
  - Number of Purchase Requests
  - `sum("PO Line"."Net Price")`



# Viewing a small selection of the many default reports



# Viewing a small selection of the many default reports

- On the next slide we have a report of Purchase Requests Monthly Trend by Format and Type in the Previous Complete 12 Months
- We can see for example that there have been many more requests for books than journals.
- It filters by
  - Creation date filter equals previous complete 12 months
- It displays measures
  - Number of Purchase Requests - Electronic Books
  - Number of Purchase Requests - Electronic Journals
  - Number of Purchase Requests - Physical Books
  - Number of Purchase Requests - Physical Journals

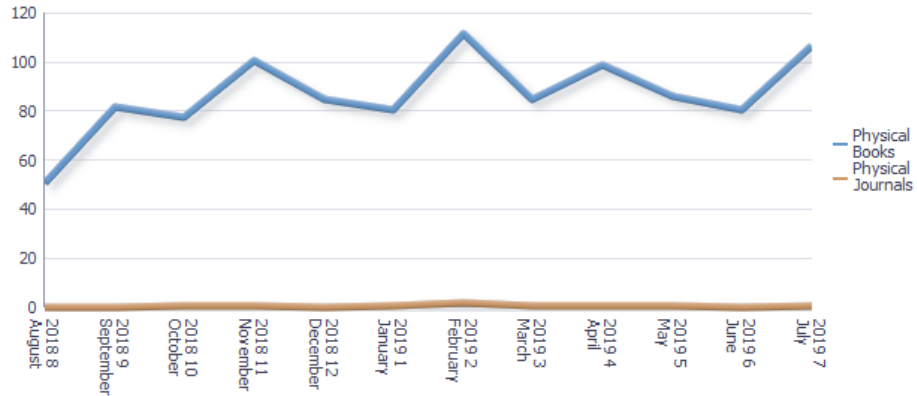
# Viewing a small selection of the many default reports

## Purchase Requests - Monthly Trend by Format and Type in the Previous Complete 12 Months

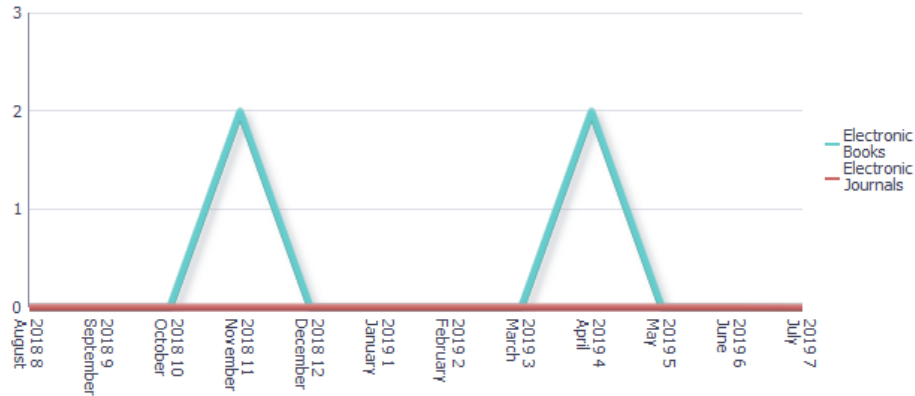
Filtered By Creation Date in the Previous Complete 12 Months

Time run: 8/14/2019 5:21:17 AM

### Purchase Requests - Physical



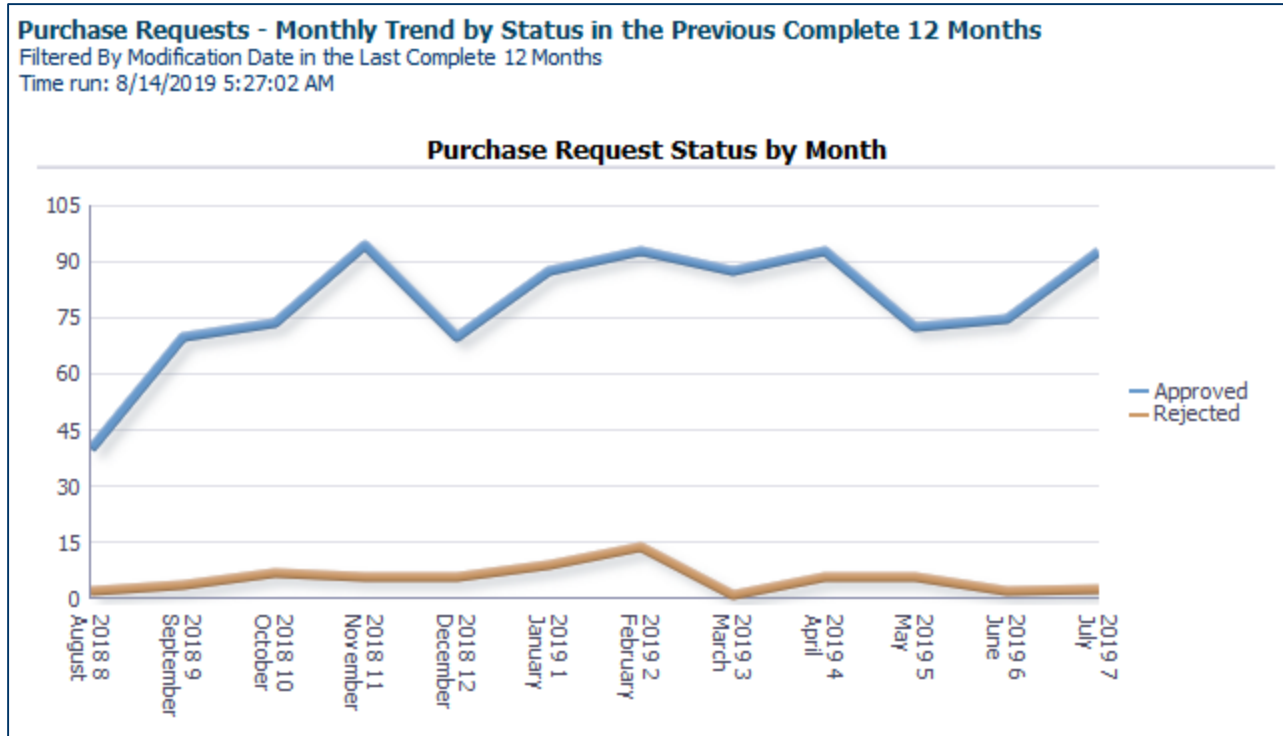
### Purchase Requests - Electronic



# Viewing a small selection of the many default reports

- On the next slide we have a report of Purchase Requests Monthly Trend by Status in the Previous Complete 12 Months
- We can see for example that there are many more "approved" requests than "rejected"
- It filters by
  - Creation date filter equals previous complete 12 months
- It displays measures
  - Number of Purchase Requests Approved
  - Number of Purchase Requests Rejected

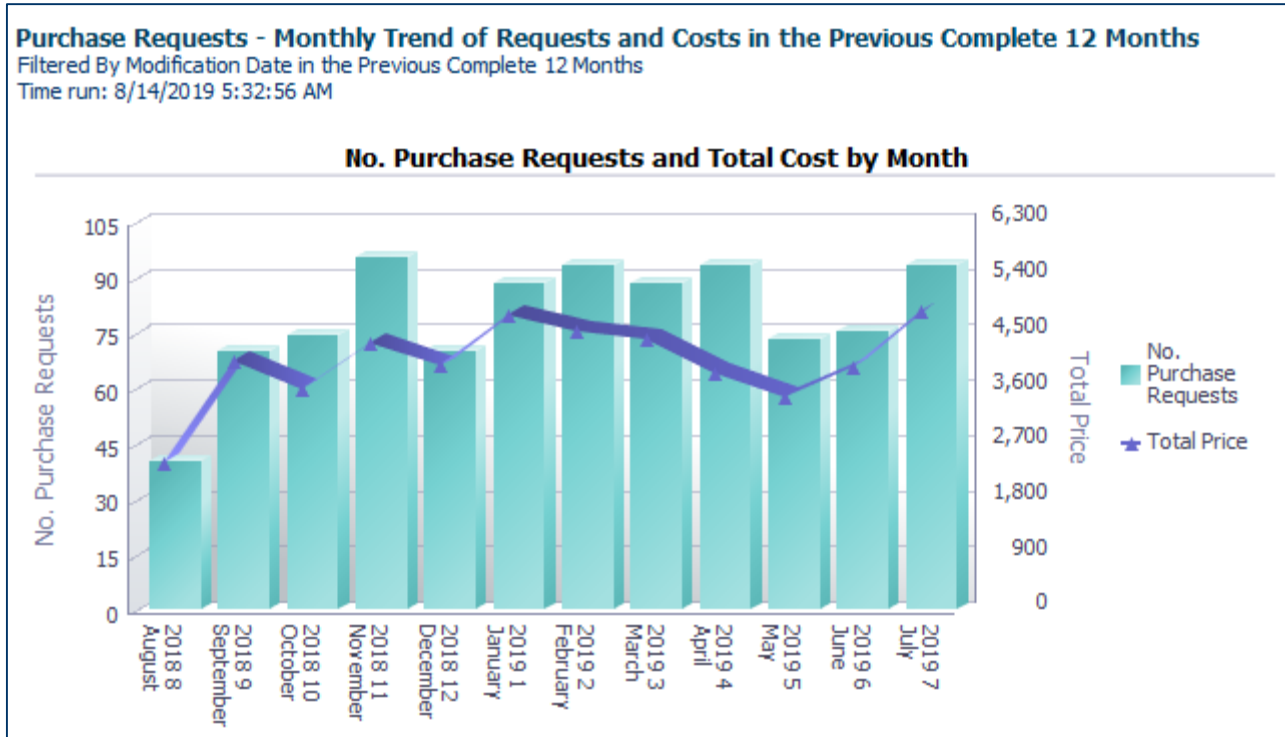
# Viewing a small selection of the many default reports



# Viewing a small selection of the many default reports

- On the next slide we have a report of Monthly Trend of Requests and Costs in the Previous Complete 12 Months
- We can see for example that, as expected, the overall cost of the POs connected to Purchase Requests is relative to the numbers of Purchase requests (more Purchase Requests means a higher overall cost)
- It filters by
  - Creation date filter equals previous complete 12 months
- It displays measures
  - Number of Purchase Requests
  - `sum("PO Line"."Net Price")`

# Viewing a small selection of the many default reports



# Viewing a small selection of the many default reports

- On the next slide we have a report of PO Line Reference Numbers from a Purchase Request in the Last 30 Days.
- This can be used as an input report in any other subject area which contains the PO Line reference .
- It filters by
  - Creation date is less than or equal to 30 days ago
  - Request status equals approved



# Viewing a small selection of the many default reports

## Purchase Requests - PO Line Reference Numbers from a Purchase Request in the Last 30 Days

PO Line Reference	PO Line Creation Date	Title
212212	8/7/2019	Building experiments in PsychoPy /
		Postcolonial literary geographies : out of place /
		Structure & surprise : engaging poetic turns
		The case for people's quantitative easing
		The price of permanence : nature and business in the New South
		Utopia or oblivion : the prospects for humanity /
212267	8/7/2019	Matthew Barney : Redoubt /
		On trails /
		Teaching and learning in medieval Europe : essays in honour of Gernot R. Wieland /
267098	7/22/2019	The grotesque factor : essays /
267099	7/22/2019	The code of capital : how the law creates wealth and inequality
267100	7/22/2019	Democracy and prosperity : reinventing capitalism through a turbulent century /
267101	7/22/2019	Democratic capitalism at the crossroads : technological change and the future of politics /
		The battle for home : the vision of a young architect in Syria /
267102	7/22/2019	Stop talking : indigenous ways of teaching and learning and difficult dialogues in higher education
267106	7/22/2019	Ghosts, landscapes and social memory /
		You who enter here /
267107	7/22/2019	Landscapes of dread in classical antiquity : negative emotion in natural and constructed spaces /
267108	7/22/2019	Post-9/11 heartland horror : rural horror films in an age of urban terrorism /
	7/23/2019	The collected schizophrenias : essays /
267109	7/23/2019	White /

# Viewing a small selection of the many default reports

- On the next slide we have a report of Request Handling Time from creation to rejected or approved in the Previous Complete 12 Months
- This can be useful in monitoring handling time for new purchase requests
- It filters by
  - Creation date filter equals previous complete 12 months
- It displays measures
  - "Purchase Request Measures"."Number of Purchase Requests"
  - `AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Creation Date"."Creation Date", "Modification Date"."Modification Date"))`
  - `MAX(TIMESTAMPDIFF(SQL_TSI_DAY, "Creation Date"."Creation Date", "Modification Date"."Modification Date"))`
  - `MIN(TIMESTAMPDIFF(SQL_TSI_DAY, "Creation Date"."Creation Date", "Modification Date"."Modification Date"))`

# Viewing a small selection of the many default reports

## Purchase Requests - Request Handling Time from creation to rejected or approved in the Previous Complete 12 Months

Filtered By Modified Date in the Last Complete 12 Months

Time run: 8/14/2019 7:26:24 AM

Average Handling Days = Time from Purchase Request is created until it is either "Rejected" or "Approved"

Average Handling Time (Days)

**11**

Number of Purchase Requests	Average Handling Time (Days)	Maximum Handling Time (Days)	Minimum Handling Time (Days)
301	11	263	0



## List of all default reports with explanation

# List of all default reports with explanation

- Purchase Requests – Assigned and Not Updated within the Last 30 Days Details
  - A List of Purchase Requests that have a Modification Date greater than 30 days ago, that are assigned, but are not finalized.
- Purchase Requests – Monthly Trend by Format and Type in the Previous Complete 12 Months
  - Two Line Charts (Physical and Electronic) showing number of requests over time, grouped by format. Dates are based on Creation Date
- Purchase Requests – Monthly Trend by Status in the Previous Complete 12 Months
  - A line chart of finalized requests over time (Modification Date), grouped by status.

# List of all default reports with explanation

- Purchase Requests – Monthly Trend of Requests and Costs in the Previous Complete 12 Months
  - A combination chart of finalized requests showing the number of requests (bar) and total price (line - based on Net Price from PO Line) grouped over time (Modification Date.)
- Purchase Requests – PO Reference Numbers from a Request in the Last 30 Days
  - A List of PO Line References, PO Line Creation Date, and Titles that were created from Purchase Requests from requests created in the last 30 days.
- Purchase Requests – PO Line IDs from a Request in the Last 365 Days
  - A List of PO Line References, PO Line Creation Date, and Titles that were created from Purchase Requests from requests created in the last 365 days.

# List of all default reports with explanation

- Purchase Requests – Quarterly Trend of Requests and Costs in the Previous Complete 8 quarters
  - A combination chart and list of finalized requests, showing number of requests (bar) and total price (line - based on Net Price of PO Line) over time, grouped by quarter (Modification Date).
- Purchase Requests – Request Handling Time from creation to rejected or approved in the Previous Complete 12 Months
  - Statistics showing number of requests, average, minimum and maximum handling time (in days) of requests. Handling time is time from the creation of the request until its status is finalized (using the creation and modification dates.)
- Purchase Requests – Request Handling Time from creation to rejected or approved in the Previous Complete 12 Months Details
  - Statistics showing number of requests, average, minimum and maximum handling time (in days) of requests. Handling time is time from the creation of the request until its status is finalized (using the creation and modification dates.) This information is grouped by the user 'Modified By Primary Identifier' – the last user to modify the request (presumably the user who handled the request).

# List of all default reports with explanation

- Purchase Requests – Requests Created in the Last 365 Days by User Group
  - A bar chart of number of requests grouped by the Creator's User Group
- Purchase Requests – Requests Created in the Last 30 Days by Status
  - A pie chart and list of number of requests in the last 30 days, grouped by status
- Purchase Requests – Requests Created in the Last 365 Days by Creator User Record Type
  - A pie chart and list of number of requests in the last 365 days grouped by the request creator's User Record Type



# List of all default reports with explanation

- Purchase Requests – Request Created in the Last 365 Days by Format
  - A pie chart and list of the number of requests created in the last 365 days grouped by format
- Purchase Requests – Requests Created in the Last 365 Days by Library
  - A bar chart of number of requests created in the last 365 days grouped by library
- Purchase Requests – Request Created in the Last 365 Days by Source Type
  - A bar chart of number of requests created in the last 365 days grouped by creation source type

# List of all default reports with explanation

- Purchase Requests – Requests Created in the Last 365 Days by Status
  - A pie chart and list of number of requests in the last 365 days, grouped by status
- Purchase Requests – Requests Created in the Last 365 Days by Vendor
  - A bar chart of number of requests in the last 365 days grouped by vendor
- Purchase Requests – Summary of Requests Unassigned or Not Updated that are Older Than 30 Days
  - A bar chart of number of requests not finalized and not updated within the last 30 days, grouped by assignee (Assigned To Primary Identifier.)

# List of all default reports with explanation

- Purchase Requests – Top 10 Requested LC Groups Requests Created in the Last 30 Days
  - A bar chart and list of the top 10 LC Groups by number of requests created in the last 30 days
- Purchase Requests – Top 10 Requested LC Group Requests Created in the Last 365 Days
  - A bar chart and list of the top 10 LC Groups by number of requests created in the last 365 days
- Purchase Requests – Unassigned and Older than 30 Days Details
  - A list of details of requests that are not finalized and are unassigned whose creation date is more than 30 days ago.



**THANK YOU!**

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Yoel

