Loans Over the Last Three Days

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Learning outcomes

- Understand how to use an SQL date function
- Understand how to create a graph in Analytics.
- Understand how to add Analytics graph as a dashboard widget in Alma.
Example scenario:

In order to show a need for more student employees, your Access Services manager wants you to display a graphical representation of how many materials they loaned over each of the last three days. He wants this to display on the main Alma screen and always be updated with the latest information.
Create New Analysis

- Need a Fulfillment Subject Area
Add total loans and loan date

- Add total loans and loan date.
Filter first to just get actual loans.

- We do not want to include in house use checkouts, choose In House Loan Indicator is equal to “N”.
Filter to just the Hatfield Library

- Use the Library Name of the Item Location

Since we have two libraries we will limit by Library Name of where the item is located.
Limit to just the last three days

- Use an SQL filter by when the item was loaned, but no Date Key in Filters.
Create initial limit by Loan Date / Convert to SQL

- Choose a Due Date greater than a specific date and then convert to SQL.
Keep Around Frequently Used SQL Statements

- Due Date SQL Statement:

  "Loan Date"."Date Key"  > TIMESTAMPADD(SQL_TSI_DAY, -4, CURRENT_DATE)

  This basically gives me the last three days before today.
Update SQL Statement

- Original SQL statement.

```
"Loan Date"."Loan Date" > date '2016-06-14'
```

- Updated SQL statement.

```
"Loan Date"."Date Key" > TIMESTAMPDIFF(SQL_TSI_DAY, -4, CURRENT_DATE)
```
Initial results

- Not all that exciting:
Add a graphical display

- Lots of choices and recommendations
Graph will be added to the current object

- You will want to remove the table from the layout.
Final graph

- Loans from the library for the last three days
Add it now as a widget in Alma

- Go to the Analytics Configuration menu:
Create an Analytics Object

- Objects can be Dashboards, Scheduled Reports, and Widgets
Define the object field elements

- Locate the analysis in analytics and set the object type

Every Analytics object needs to have a role assigned to it to access it. Sort of a permissions control.
Activate the widget

- All available widgets will display in the interface.
Final result:

- A dashboard to demonstrate how busy the circulation desk was.
Questions / Comments

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