Learning outcomes

● Understand how to isolate a list to a certain request type
● Understand how to exclude withdrawn/deleted records
● Understand how to display an analysis in a widget in Alma
Example scenario

Goal: Identify items given the request type Equipment to Withdraw so these items can be withdrawn.
In this example, we are using the Requests subject area.
A filter is created to identify which items have the request type **Equipment to Withdraw**
Another filter excludes withdrawn records
Deleting a column in Selected Columns will not delete any filters. Selected Columns and Filters are two separate sections.

Everything in Selected Columns (in the red box) is data which will be viewable in the results.

Everything in Filters (in the green box) are behind-the-scenes instructions. These are not viewable in the results, but they affect what results are shown.
Unwanted request statuses are filtered out

**Selected Columns**
Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column’s properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

<table>
<thead>
<tr>
<th>Bibliographic Details</th>
<th>Physical Item Details</th>
<th>Request Details</th>
<th>Request Date</th>
<th>Request Type</th>
<th>Request Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Barcode</td>
<td>Status (latest step)</td>
<td>Modification Date</td>
<td>Request Date</td>
<td>Request Type Description</td>
</tr>
</tbody>
</table>

**Filters**
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

- Request Type Description is equal to / is in Equipment to withdraw
- Lifecycle is not equal to / is not in Deleted
- Request Status is not equal to / is not in Completed; Rejected; Rejected By Library; Rejected By Patron
- Barcode is not null
We only want current, active, “real” records to show, so we exclude records with no barcodes.
To illustrate why the barcode filter is important, here are results with and without this filter.

Without the barcode filter these are the results:

Notice the barcode field is empty. This is an old deleted record we don’t want showing up on this report, so we add the filter **barcode is not null**. This produces an analysis with no results, which is accurate because at the moment no items have the request type Equipment to withdraw.

With the barcode filter these are the results:

The specified criteria didn’t result in any data. This is often caused by applying filters and/or selections that are too restrictive. Reapply the filters and try again. The filters currently being applied are shown below.
To display this analysis in Alma

This takes two steps.

Step 1: Create an analytics object

Step 2: Add widget to Alma dashboard
Step 1: Create analytics object

In Alma go to main menu>Administration>Analytics>Analytics Configuration Menu
Go to Analytics Object List>Add New Analytics Object
Select Widget from the Type menu

Select the folder you saved the analysis in. It will auto-search as you type in the Analytic Folder field.
Select the analysis you saved.

The analysis must be saved in the Shared Folders in Analytics in order to access it here in Alma.

The path is Shared Folders>Your institution's name
Don’t forget to add a title and select a role.

The role tells Alma which users are allowed to access this widget. If no roles are added no one will be able to see the widget.
Step 2: Add widget to Alma dashboard

From the Alma mainscreen, click Add Widget & select the widget to activate it. (click red x to close the window).

Widgets can be moved around by clicking the widget title and dragging into desired position.