2021年第一季度 Alma新功能在线研讨会

艾利贝斯中国技术支持团队



议题和资料

- 议题
 - 1. ExLibris Secure FTP Service 介绍Alma提供的免费SFTP服务
 - 2. All About Letters Configuration 分享整理的信件定制文档
 - 用户实例经验分享 南科大 邱老师
 - 3. Analytics Use Case 分享来自两个客户案例的分析报告案例
 - 4. All About OAS and DV 分享整理的分析与数据可视化文档

- 资料
 - 相关演示文档会以PDF格式分享到Alma中国用户QQ群文档
 - Alma中国用户交流QQ群: 49483514



重要提示和更新

- New Alma Layout Turned On for All Users (2020.11)
- PQ EBC Upload Electronic Holdings Improved (2020.11)
- SAML Certificate Workflow Update (2021.02)
- New MDE Layout Turned On as Default for All Users (2021.03)
- Support Discontinued for Internet Explorer (2021.03)
- New Alma Layout Exclusive Use (2021.03)
- Go VE Rollout (2020.11)
- Partial Linking Indication in MDE (2020.11)
- New Ex Libris Secure FTP Service (2020.12)



Go VE Rollout (2020.11)

 Go VE, the self-switch process to move from Primo to Primo VE, is being gradually rolled out and made available as part of the November release to all single institutions (which are not part of a Network Zone) who use the Primo Back Office together with Alma. The Go VE button is visible in the Alma menu to General System Administrator users.

- <u>http://exl-edu.com/02_Primo/GoVE/GoVE_Web/story_html5.html</u>
- <u>https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Go_VE</u>
 <u>/Getting_Started_with_Go_VE</u>



XSLT as Part of an Integration Profile (2020.11)

 XSLT converters were introduced to Alma that enable converting data from source system formats to the format required by Alma, when importing users to Alma from SIS systems that use other data formats. Now this ability has been enabled to all customers.

 <u>https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alm</u> <u>a Online Help (English)/090Integrations with External Systems/030Resour</u> <u>ce Management/440Integration_XSL_Converters?mt-draft=true</u>



Partial Linking Indication in MDE (2020.11)

 The presentation of a link between a bibliographic heading with subdivision to an authority record without subdivision (partial linking) in the Metadata Editor was improved to better display the type of different types of linking. Now it more clearly displays partial and full linking.

 <u>https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alm</u> <u>a Online Help (English)/Metadata Management/060Working with Authori</u> <u>ty Records?mt-</u> <u>draft=true#Viewing Linked Names.2FSubject Headings from a Bibliograph</u> <u>ic Record</u>



New Ex Libris Secure FTP Service (2020.12)

- Ex Libris now provides out-of-the-box Secure FTP service for file transfer between Alma and external system. The Ex Libris Secure FTP services provides a separate directory for each customer.
- Limitations to the Ex Libris FTP server directories:
 - Max 1GB for each directory (production/sandbox)
 - Data retention period 30 days



All about the New MDE

- With the April 2021 release, the New Metadata Editor ... providing full functionality ... became the default editor... becomes the only editor by June 2021 release.
- <u>New Metadata Editor Functionality Ex Libris Knowledge Center</u> (exlibrisgroup.com)
- <u>Metadata Editor Ex Libris Knowledge Center (exlibrisgroup.com)</u>
- <u>Presentations and Documents Resource Management Ex Libris Knowledge</u> <u>Center (exlibrisgroup.com)</u>



All about the OAS and DV

•新的Analytics和数据可视化功能已经启用了一段时间,希望 大家可以在日常工作中更多了解和使用到相关功能。

- 这里提供参考和培训资料如下:
- Oracle Analytics Server (OAS) and Data Visualization (DV) Ex Libris Knowledge Center (exlibrisgroup.com)
- OAS (Oracle Analytics Server) and DV (Data Visualization) Ex Libris Knowledge Center (exlibrisgroup.com)
- <u>Analytics Ex Libris Knowledge Center (exlibrisgroup.com)</u>





- 定期查看 Alma 的版本更新通知 Release Note:
 - <u>Release Notes Ex Libris Knowledge Center (exlibrisgroup.com)</u>

- 留意更新信息包括如下部分:
 - Make the Most of March's Release
 - Upcoming Issues to Note
 - Main Features
 - Additional Enhancements
 - Resolved Issues





- 使用如下业务或组件关键字检索:
 - Module: Acquisition / Fulfillment / Resource Management / Analytics ...
 - Terms: Metadata Editor / PO Line / CDI / GuideMe / Letters / Calendar ...
 - General Keyword: Hot Key / API / Integration ...
- 请测试新功能并反馈,我们会为您提供技术支持

• 感谢您的参与,请填写问卷:

https://www.wjx.top/vj/P70pUGF.aspx



Thank you!

ChinaSupport@exlibrisgroup.com



Ex Libris Secure FTP Service





- 从2020年12月开始, Ex Libris更新了出厂FTP服务器;
- FTP服务器处理Alma和外部系统间的文件传输;
- •每个客户享有独占的生产和沙盒两个目录;
 - 这两个目录实际在一个总目录下, 共享一个密钥
 - 您和Alma都有这些目录的读取/写入权限
 - 目录最大容量1GB 超出会出现错误提示
 - 数据保留期限30天 逾期数据将会被自动删除
 - 可选对传输的文件做 PGP 公钥加密
- 参考: <u>配置Ex Libris Secure FTP服务</u>
- 参考: Introducing Ex Libris Secure FTP Service





• 配置菜单 > 通用 > 外部系统 > S/FTP定义

S/I	TP诌	接列表				返回
	Ex Lib	ris Secure FTP Service				~
	服务	器 custdata-dc81.hosted.exlibrisgroup.com:10022	用户 alma_trial_3_inst@customers.ch	子目录 produ	ction	
		生成个人密钥		可选参数		
	1-2	中的 2 名称 - Q		添加S/FTP连接	G	0
		▲名称	◆描述			
	1	AlmaFTP sample	AlmaFTP sample			
	2	SIS	Student Information System	(

- 以上测试环境为例,可以获得如下信息:
 - 服务器 custdata-dc81.hosted.exlibrisgroup.com:10022
 - 用户 <u>alma_trial_3_inst@customers.ch</u>
 - 子目录 production
 - 可选参数 (需要提前配置"通用 > 管理加密密钥")

ExLibris



• 配置菜单 > 通用 > 外部系统 > S/FTP定义

S/FTP	生接列表				返回
Ex Li	bris Secure FTP Service				~
服約	P器 custdata-dc81.hosted.exlibrisgroup.com:10022) 生成个人密钥	用户 alma_trial_3_inst@customers.ch	子目录 prod 可选参数	uction	
1 - 2	中的 2 名称 • Q		添加S/FTP连接	₿	•
	▲名称	◆描述			
1	AlmaFTP sample	AlmaFTP sample		•••	
2	SIS	Student Information System		•••	

- 点击"生成个人密钥"得到"id_rsa"密钥文件;
- SFTP登录认证使用如上密钥,不需要用户名和密码;
- 点击"生成个人密钥"会重置连接,以前的密钥自动失效;
- 以上配置完整有效,不需要联系ExLibris技术支持即可使用;

测试准备

- Unix Shell
 - Windows下可以使用 Git Bash (<u>https://git-scm.com/downloads</u>)
 - sftp -o Port=10022 \setminus
 - -o IdentityFile=./alma_trial_3_inst \
 - -o User=alma_trial_3_inst@customers.ch \
 - custdata-dc81.hosted.exlibrisgroup.com

- 应用程序
 - 转换密钥 Putty Gen (<u>https://www.puttygen.com/download-putty</u>)
 - 连接服务 WinSCP (<u>https://winscp.net/eng/download.php</u>)



测试连接 - 1

• 使用命令行 (Unix Shell)

\$ sftp -o Port=10022 -o IdentityFile=./id_rsa -o User=alma_trial_3_inst@customer

s.ch custdata-dc81.hosted.exlibrisgroup.com

Connected to custdata-dc81.hosted.exlibrisgroup.com.

s ls

production sandbox

s pwd

Remote working directory: /

可使用 ls 和 pwd 命令验证 登录成功

ExLibris

• 使用WinSCP (用Putty Gen转换密钥为PPK格式)

Putty K	ley Generator		?	×
File Key	Conversions Help			
Key	Import key			
AAAAB3 ZJ31mz +kwB4M C4K4Te	Export OpenSSH key Export OpenSSH key (force new Export ssh.com key yzcual/xhнeнureuumseunacia3owro	- file format) fil אטבעאדעיפסאנטפערניסט	ETh0as9c ax6xJkW MMFGxo	
Key finge	rprint: ssh-rsa 2048 bb:c6:e3:43.fb	:de:8e:31:58:46:7b:88:b4:	c5:32:62	
Key com	nent: imported-openssh-key			
Key pass Confirm p	ohrase:			
Actions				
Generate	a public/private key pair	G	enerate	
Load an e	existing private key file		Load	
Save the Parameter	generated key Sa	ve public key Save	private ko	ey
Type of k RSA Number o	ey to generate: ODSA OECDSA f bits in a generated key:	○ ED25519 ○	SSH-1 (R 48	SA)

• Admin > Run a Job > Export Bibliographic Records

<	Run a Job - Enter	r Task Parameters 1-2-3-4 Cancel Bac	k Next
Т	ask Parameters: Export	t Bibliographic Records	~
	Physical format	XML -	
	Output format	CNMARC Bibliographic	
١	Number of records in file	One File	
	Expand routine		
	Export into folder	Private -	
	FTP configuration	Ex Libris Secure FTP Service	
	Sub-directory (Path relative to ftp configuration)	Test FTP]

• 在 WinSCP中查看导出结果:

🛛 📑 Test FTP 🔹 🗧 🔽 😭 🗢 🔹 🔿 💼 🔂 🏠	i 🎜 🔯 Fir	nd Files 🛛 🗧
🗄 🗃 Download 👻 📝 Edit 👻 🔀 🕞 Properties 📑	New - +	
/production/Test FTP/*.*		
Name	Size	Changed
±		2020/12/21 14:51:33
BIBLIOGRAPHIC_1427170840000573_1.xml	12 KB	2020/12/21 14:49:26

ExLibris

如果您有兴趣了解 SFTP 命令行

- 连接到 SFTP 服务器
 - sftp -oPort=2345 user@IP_Address
- •通用导航和目录命令(远程/本地)
 - 列印 ls / lls, 当前目录 pwd / lpwd, 导航 cd <dir> / lcd <dir>
 - 创建或删除目录 mkdir / Imkdir, rmdir / Irmdir
- 上传本地文件或本地目录
 - 文件 put <file> / mput <file1> <file2> <file3>
 - 目录 mkdir <dir> + put -r <dir> (需先建立远程同名目录)
- 下载文件或目录到本地(当前目录)
 - 文件或目录 get <file> 或 get -r <dir>
- <u>SFTP Command Line Examples (rosehosting.com)</u>

ExLibris

THANK YOU

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Analytics Report Advanced Filter with Variables



What We Want

• Combine the following three tables into one

Selected Columns				✓ Selected Columns		
Item Location at time of Ioan Library Name (Active)	Loan Loans (In House) 🌣		Item Location at time o	floan Loan ve) 🎲 🚦 Rene	ewals 🏟
⊿ Filters		Selected Columns		✓ Filters		
Table	2020 and 12/31/2020	Item Location at time o	floan Loan ve) 🔅 🚦 R	Renewal Date is between the second se	veen 01/01/2020 a	ind 12/31/2020
Library Name (Active)LoansGraduate Library	(In House) 1 0 2	Filters Recall Date is between Table A	en 01/01/2020	and 12/31/2020 Grad Law	ary Name (Active) Juate Library Library	Renewals 7 1
		Library Name (Active) Graduate Library Law Library Main Library	Recalls 10 1 6			



What We Hope

• The result of cross filtering is not desirable

Library Name (Active)	Loans (In House)	Recalls	Renewals	Table	•		A	a 🔪 🗙
	16	1	19					
Graduate Library	108	30	42	Lib	orary Name (Active)	Loans (In House)	Recalls	Renewals
Law Library	43	3	26	Gra	aduate Library	0	0	4
Main Library	236	87	226					
Music Library	25	7	34					
Resource Sharing Library	5	0	0					
Science Library	185	5	16					
Traditional Chinese Library	1	0	✓ Selecte	d Columns				
			Item Loca	ation at time of loan	Loan			
		_	Libra	ry Name (Active) 🔅	Loans (In Hous	e) 🏠 🚦 Recalls	\$	Renewals

What We Should

• It seems like using OR operator works



- What if we want to modify the filter conditions (dates)...
- What if there are more filters with the same conditions...



Some detail about the issued SQL

Advanced > SQL Issued

```
Criteria Results Prompts Advanced
SQL Issued
The following box contains the SQL code that will be sent to the Oracle Analytics Server when this analysis is executed.
SELECT
    0 s 0,
    "Fulfillment"."Item Location at time of loan"."Library Name (Active)" s 1,
    "Fulfillment"."Loan"."Loans (In House)" s 2,
    "Fulfillment"."Loan"."Recalls" s 3,
    "Fulfillment"."Loan"."Renewals" s 4
FROM "Fulfillment"
WHERE
 ((("Renewal Date"."Renewal Date" BETWEEN date '2020-01-01' AND date '2020-12-31') OR
 ("Loan Date"."Loan Date" BETWEEN date '2020-01-01' AND date '2020-12-31')) OR ("Loan
   tails"."Recall Date" BETWEEN date '2020-01-01' AND date '2020-12-31'))
ORDER BY 2 ASC NULLS FIRST
FETCH FIRST 500001 ROWS ONLY
```

• Now we hope for one place to adjust the filters for all...



Prompt based dynamic filter

Crite	eria Results Definition I prompts for use	Prompt	S Adva	this analysis.		63	₩ •	We can add variables
	Prompt Lab	el	Туре	Prompt For	Description	Requir	Column Prompt 🕨	via prompt for filters
	Page 1		Page				Variable Prompt	to use globally
1	New Prompt	:			0	×	Currency Prompt	
	Prompt for Label Description User Input Option General Variable Da Default se	Present From Text Fie Choice Check I Radio E List Boy Ra Type	eld List Boxes Juttons Denaun Q Red Auto None	riable v From r(Text) quire user input Fill None First Avail	able Value	cel	Howev type d	/er, the prompt data oes not have "Date"



Add Calendar Data Type

- Use the settings in **RED** > OK > Edit this prompt again
- Observe the magic happened in GREEN...

Edit Prompt	@ ×			
Prompt for	Presentation Variable	pt		@ ×
Label	From	ompt for	Presentation Variable	From
Doonpain		Label	From	
User Input	Choice List	scription		
Choice List Values	All Column Values 🔹			
Column	"Loan Date"."Loan Date" f_X Select Column	t Values	Choice List Calendar	•
Options		Column	Choice List Check Boxes Padio Puttons	Column
	OK Cancel	ons	List Box	
				OK Cancel

Required and Default

• You can set the variable as mandatary with default values

Edit Prompt		0
Prompt for	Presentation Variable From	
Label	From	
Description		
User Input	Calendar 🗸	
Option	ıs	
General	More	
Variable Da	ita Type Date	•
	Require user input	
	Auto Fill None	
Default s	election Specific Value	•
	2020-05-01	•
	OF	K Cance

Use Variables in Filters

Convert filter into SQL and apply the variable

Edit Filter			0 ×
Column	Renewal Date	fx	
Operator	is between		•
Value	01/01/2020		ŤO
Value	12/31/2020		Ť
	Add More Options 🔻	Clear All	
Protect	Filter		
Convert	t this filter to SQL		
			OK Cancel

Replace the filter value with: @{from}{date '2020-01-01'} AND @{to}{date '2020-12-31'}

Notice, the {date '2020-01-01'} will be the default value

Apply the same change to the other two filters as well





Use Variables in Filters

• The result of the report design:

• Preview the report of its result:

Criteria Results	Prompts	Advanced					<i>i</i>
Definition							
Add prompts for user	rs when they	run this analy:	SIS.		<mark>k</mark> + E	H 🔲 🗒 🖋	×
Prompt Labe	el Typ	e	Prompt For	Description	Required	New Column	1



Another approach to the resolution

- It IS possible to add filters to columns specifically
- Column Menu > Edit Formula > Filter...





Use Variables in Column Filters

• After creating column filer with static date values

FILTER("Loan"."Renewals" USING ("Loan Date"."Loan Date" BETWEEN date '2020-01-01' AND date '2020-12-31'))

• Presentation Variable (put placeholder in default)

	11
f() Filter Column ▼ Variable	▼ + - x / % ()
Treat as an attribute column	Session
	Repository
	Presentation
	Global OK Cancel

• The final formula with filter and variable applied

Column Formula

Column Formula

FILTER("Loan" "Renewals" USING ("Renewal Date" "Renewal Date" BETWEEN @{from} {date '2020-01-01'} AND @{to}{date '2020-12-31'}))

Now you know the tricks of @{var} and {default}



Use Variables in Column Filters

• Column based filters are all hidden:

✓ Selected Columns						
Loan						
Renewals 🔅	Loans (In House) 🔅	Recalls 🔅				
	Loan Renewals	Loan Renewals 🅸 🔒 Loans (In House) 🅸				

• You get almost the same result as before:

Table 🖪 🚾 🖍 🗙						
Library Name (Active)	Loans (In House)	Recalls	Renewals			
Graduate Library	1	10	7			
Law Library	0	1	1			
Main Library	2	6				



Use Variables in Column Filters

• If you are curious about the issued SQL > Advanced

```
Advanced
Criteria Results
               Prompts
SOL Issued
The following box contains the SQL code that will be sent to the Oracle Analytics Server when this analysis is executed.
SELECT
    0 з 0,
    ruiriinment"."Item Location at time of loan"."Library Name (Active)" s 1,
    FILTER("Fulfillment"."Loan"."Loans (In House)" USING ("Fulfillment"."Loan
Date"."Loan Date" BETWEEN date '2020-01-01' AND date '2020-12-31')) s 2,
    FILTER("Fulfillment"."Loan"."Recalls" USING ("Fulfillment"."Loan
Details"."Recall Date" BETWEEN date '2020-01-01' AND date '2020-12-31')) s 3,
    FILTER("Fulfillment"."Loan"."Renewals" USING ("Fulfillment"."Renewal
      "."Renewal Date" BETWEEN date '2020-01-01' AND date '2020-12-31')) s 4
FROM "Fulfillment"
ORDER BY 2 ASC NULLS FIRST
FETCH FIRST 500001 ROWS ONLY
```

- Notice the inline filter applied in the SELECT clause
- It is different from the usage of OR in WHERE clause



Look Out the Limitation

• Each time you go back to the Prompt, you lost the magic

Edit Prompt						0	×
Prompt for	Presenta	ation Variable	• •	From			
Label	From	From					
Description							
User Input	Text Fiel	ld.		•			
Option	ıs						
General	More						
Variable Da	ita Type	Date			•		
			user in	put			
		Auto Fill	No	ne st Available Va	alue		
Default selection		Specific Val	ue		•		
		2020-05-01					
					ОК	Canc	el

* Notice the prompt falls back to Text Field again.

* Do not save or you must go through the workaround for adding the Calendar picker back


Question time...

• If you do not have question, I have one. The Q1:

Selected Columns						
Itom Location at time of loc	an Loan					
Library Name (Active)	Renewals 🔅					
⊿ Filters						
T Renewal Date is betwee	n 01/01/2020 and 12/31/2020					
Table [🗛 🚥	/ ×					
Library Name (Active) R	enewals					
Graduate Library	7					
Law Library	1					

The standalone report

Table			/ X
Library Name (Active)	Loans (In House)	Recalls	Renewals
Graduate Library	1	10	8
Law Library	0	1	1
Main Library	2	6	0

The report with OR operator

Table		[A] 232	/ X
Library Name (Active)	Loans (In House)	Recalls	Renewals
Graduate Library	1	10	7
Law Library	0	1	1
Main Library	2	6	

The report with filter on columns



The investigation to Q1

• Find the detail of the renewal records

able		[<u>A</u>]	372 💉 🗙
Library Name (Active)	Renewals	Renewal Date	Barcode
Graduate Library	7	3/25/2020	2713514979
Law Library	1	4/10/2020	1462184

• Lookup the fulfillment history of 2713514979

8	Return	04/08/2020 14:15:09 CST	Test, Loan	loantest 💵
9	Loan	03/25/2020 15:34:11 CST	Test, Loan	loantest 🔝
10	Return	03/25/2020 15:33:40 CST	Test, Loan	loantest 🛓
11	Loan	03/25/2020 15:20:17 CST	Test, Loan	loantest 🜆
12	Return	03/25/2020 15:18:16 CST	Test, Loan	loantest 🜆
13	Loan	03/25/2020 14:40:29 CST	Test, Loan	loantest 🛓



The investigation to Q1

• Fulfillment activities of the patron (ID loantest)

1 - 4 of 4	Barcode - 2713514979	Q		D 🗘
	🖨 Barcode	Loan Date	Owned By Library	
1	2713514979	05/20/2020	Graduate Library	
2	2713514979	03/25/2020	Graduate Library	
3	2713514979	03/25/2020	Graduate Library	
4	2713514979	03/25/2020	Graduate Library	

• Loan History

	Action Date	Action	Due Date			Loan Status			
1	03/25/2020 15:15:01 CST	Renewed	03/25/2020		Action Dat	te	Action	Due Date	Loan Status
2	03/25/2020 15:12:34 CST	Renewed	03/25/2020	1	03/25/202	0 15:28:03 CST	Renewed	06/25/2020 15:28:03 CST	Active
3	03/25/2020 14:45:10 CST	Recalled	03/25/2020	2	03/25/202	0 15:26:51 CST	Renewed	06/25/2020 15:26:51 CST	Active
4	03/25/2020 14:40:30 CST	Loan	03/25/2020	3	03/25/202	0 15:26:05 CST	Renewed	06/25/2020 15:26:05 CST	Active
	Action Date	Action	Due Dete	4	03/25/202	0 15:20:18 CST	Loan	06/25/2020 15:20:18 CST	Active
		Action	Due Date			Louirotatas			
1	03/25/2020 15:36:16 CST	Renewed	06/25/2020	15:3	6:16 CST	Active			
1 2	03/25/2020 15:36:16 CST 03/25/2020 15:36:11 CST	Renewed Renewed	06/25/2020 06/25/2020	15:3 15:3	6:16 CST 6:11 CST	Active Active	Th	ara chauld ba	7 ropou
1 2 3	03/25/2020 15:36:16 CST 03/25/2020 15:36:11 CST 03/25/2020 15:35:53 CST	Renewed Renewed Recalled	06/25/2020 06/25/2020 06/25/2020	15:3 15:3 15:3	6:16 CST 6:11 CST 4:11 CST	Active Active Active	The	ere should be	7 renev

The investigation to Q1

• Fulfillment activities of the patron (ID loantest)

Library Name (Active)	Barcode	Recalls	Recall Date	Renewals	Renewal Date
Graduate Library	16199-10	1	4/10/2020	0	
	2103514979	1	6/29/2020	0	
		0		1	8/15/2018
	2713514979	0		3	3/25/2020
		2	3/25/2020	0	
		0		4	3/25/2020
		1	5/13/2020	0	
		5	5/20/2020	0	

- The one record above should not have 1 in Renewals
- Notice, its Renewal Date is not in the filter's range
- However, its Recall Date is in the filter's range
- The OR operator resolution does not work!



THANK YOU

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Analytics Report Aggregate by Specified Field



• The default Fund Expenditure cannot fulfill requirement

Lit	brary Code	Quantity for Pricing	COUNT(DISTINCT Title)	Fund Expenditure	PO Line Reference
	FIN	2	1	365.40	01934703
	HUM	2	1	852.60	01934703

- For the following reasons:
 - There are two copies ordered in PO Line o1934703
 - The customer paid 609 for each copy of each library
- Furthermore:
 - Some PO Line may have different # of copies for each library
 - The payment was all placed by the # of copies
 - There should be a total statistic and subtotal per library



• How is Fund Expenditure (365.4 & 852.6) calculated:

	Library	Location	Call Number	Number of Items	
1	Humanities and Social Sciences Library	hsper-lib	C JR286a	84	•••
2	Finance Library	06004-lib	C JR286a	36	
	Receiving note FIN: 06002 (1 UM: hsper (1)	Routing du	ing receiving No	Binding during receiving	No

- Notice the Number of Items value (84 & 36)
 - (365.4 + 852.6) * (36 / (84 + 36)) = 1218 * 0.3 = 365.4
 - (365.4 + 852.6) * (84 / (84 + 36)) = 1218 * 0.3 = 852.6
- The # of copies info is saved in the Receiving Note
 - We need to put the # of copies info into metadata for reporting
 - Divide Fund Exp. by # of copies per PO line between libraries



Resolution – # of Copies

• Use 852\$t (Copy ID) field for saving # of copies:



- Cast Copy ID data type from String to Integer
 - CAST("Holding Details"."Copy Id" AS int)
 - Percentage: # of copies / Quantity for Pricing
 - Turn on aggregation per column in the Layout settings





Resolution – Aggregate by POL

- Sum Fund Expenditure per PO Line across Libraries
- Start from the calculation of total Fund Expenditure

```
Criteria Results Prompts Advanced
SOL Issued
The following box contains the SQL code that will be sent to the Oracle Analytics Server when this analysis is executed.
SELECT
   0 s 0,
   "Physical Items". "Holding Details". "Copy Id" s 1,
   "Physical Items"."Library Unit"."Library Code" s 2,
   "Physical Items". "PO Line". "PO Line Reference" s 3,
   "Physical Items". "PO Line". "Quantity for Pricing" s 4,
   CAST ("Physical Items". "Holding Details". "Copy Id" AS int) / "Physical Items". "PO Line". "Quantity for Pricing" s 5,
   "Physical Items". "Fund Measures". "Fund Expenditure" s 6,
   COUNT (DISTINCT "Physical Items". "Bibliographic Details". "Title") s 7,
   REPORT AGGREGATE (COUNT (DISTINCT "Physical Items"."Bibliographic Details"."Title") BY ) s 8,
   REPORT SUM("Physical Items"."Fund Measures"."Fund Expenditure" BY ) s 9,
   REPORT SUM("Physical Items". "PO Line". "Quantity for Pricing" BY ) s 10
FROM "Physical Items"
WHERE
(("Fund Fiscal Period"."Fund Fiscal Period Description" = 'FY-2020') AND ("PO Line"."PO Line Reference" = '01934703'))
ORDER BY 3 ASC NULLS FIRST, 4 ASC NULLS FIRST, 5 ASC NULLS FIRST, 2 ASC NULLS FIRST, 6 ASC NULLS FIRST
FETCH FIRST 500001 ROWS ONLY
```

* This is the essence of the whole document:

REPORT_SUM("Physical Items"."Fund Measures"."Fund Expenditure" BY "PO Line"."PO Line Reference")



Resolution – Aggregate by POL

• How is Fund Expenditure (365.4 & 852.6) calculated:

Library Code	PO Line Ref.	# of Copies	Total Copies	Percentage	Fund Exp.	Fund Exp. by POL
FIN	o193465x	1	3	0.33	493.09	7,875
	o1934703	1	2	0.50	365.40	1,218
HUM	o193465x	2	3	0.67	7,381.90	7,875
	o1934703	1	2	0.50	852.60	1,218
	o1935409	2	2	1.00	6,618.00	6,618
	o1945312	1	2	0.50	1,729.88	1,730
	06511302	2	2	1.00	2,498.00	2,498
	06511314	2	2	1.00	2,538.00	2,538
Grand Total			18		22,476.87	

• Multiply Percentage with Fund Exp. By POL

PO Line Ref.	# of Copies	Total Copies	Percentage	Fund Exp.	Fund Exp. by Copies
o193465x	1	3	0.33	493.09	2,625
o1934703	1	2	0.50	365.40	609
o193465x	2	3	0.67	7,381.90	5,250
o1934703	1	2	0.50	852.60	609



Curiosity – POL o1945312

• How is Fund Expenditure (906.13 & 1729.88) calculated:

	Library	Location	Call Number	Number of Items	Copy ID	
1	Law Library	law202-lib	C QE73101	22	1	
2	Humanities and Social Sciences Library	hsper-lib	C QE73101	42	1	•••

• Removing the library filter resolves the ssue:

Library Code	PO Line Ref.	# of Copies	Total Copies	Per	centage	Fund Exr.	by POL	by Copies
FIN	o193465x	1	3		0.33	493.09	7,875	2,625
	o1934703	1	2		0.50	365.40	1,218	609
HUM	o193465x	2	3		0.67	7,38 <mark>1.90</mark>	7,875	5,250
	o1934703	1	2		0.50	852.60	1,218	609
	o1945312	1	2		0.50	1,729.88	2,636	1,318
LAW	01740131	1	2		0.50	291.00	291	146
	o1945312	1	2		0.50	906.13	2,636	1,318
MAIN	01739256	1	4		0.25	93.12	93	23
	o1739931	1	2		0.50	279.36	279	140
Grand Total			22			12,392.48		

It brings in new issues on some other standalone PO Lines



Curiosity – POL o1740131

• Discrepancy: Ordered Items <> Quantity for pricing

Orc	lered Items											~
												4
	Library			Location		Call Number		Number of Items	<u>г</u>	Copy ID		
1	Law Library			law202-lib		G236 QZ63701		1		1		•••
	Receiving note	2021				Routing during rea	ceiving	No	Binding	g during receiving	No	
Ver	ndor Information		Items in t	his PO Li	ne ar	e not full	y reo	ceived				>
Pri	cing											~
	List price			150.00 CNY		Net price	300.00	CNY				
C	uantity for pricing	2				Discount (%)	0.0					
	Amount paid in current FP	-										

- Sum Copy ID directly for calculating the percentage:
 - CAST("Holding Details"."Copy Id" AS int) / REPORT_SUM(CAST("Holding Details"."Copy Id" AS int) BY "PO Line"."PO Line Reference") * 100



 Total & Subtot 	tal 🛛 🛁							
-	Libra	ary Code	PO Line Ref.	# of Copies	Fund Exp.	by POL	Percentage	by Copies
	Folder Heading	Fund Measur	20	1	¥ 493.09	¥7,875.00	33%	¥ 2,625.00
	rotactricating			1	¥ 365.40	¥ 1,218.00	50%	¥ 609.00
Columns and Measures 📡 🔤	Column Heading F	Fund Exp.			¥858.49			
Library Unit PO	ľ	Custom F Contains	leadings HTML Markup	2	¥ 7,381.90	¥7,875.00	66%	¥ 5,250.00
Library Code 🏟 😰 📕 Aggregat	tion Rule (Totals Row)	Rule (Totals Row) Default (Sum)		1	¥ 852.60	¥ 1,218.00	50%	¥ 609.00
Excluded None	, , , , , , , , , , , , , , , , , , ,		01935409	2	¥ 6,618.00	¥6,618.00	100%	¥ 6,618.00
Drop here to exclude fro			01945312	1	¥ 1,729.88	¥ 2,636.00	50%	¥ 1,318.00
Format Labels			06511302	2	¥ 2,498.00	¥ 2,498.00	100%	¥ 2,498.00
Selection Steps Format Values	Column Properties			2	¥ 2,538.00	¥ 2,538.00	100%	¥ 2,538.00
• Data Format	Style Column Format	Data Format	Conditional Forma	at	¥21,618.38			
• Data Format	Override Default Da	Override Default Data Format Treat Numbers As Percentage		1	¥ 291.00	¥ 291.00	100%	¥291.00
Column Properties	Treat Numbers As			1	¥ 906.13	¥ 2,636.00	50%	¥ 1,318.00
Style Column Format Data Format Conditional Form	nat Negative Format	Minus: -123	•		¥1,197.13			
Override Default Data Format	Decimal Places	0 🔻		1	¥93.12	¥93.12	100%	¥93.12
Treat Numbers As Currency		✓ Use 1000's \$	Separator	1	¥ 279.36	¥ 279.36	100%	¥279.36
Currency Symbol ¥ 中文 - Chinese - 中华人民共和国	(PR-,	Scale for % (x 100)			¥ 372.48			
Negative Format Minus: -123 🔹	Gran	nd Total			¥24,046.48			
Decimal Places 2								
Use 1000's Separator								

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Notes

- Customized Column Formulas (Check the Advanced tab)
 - Fund Expenditure by POL:
 - REPORT_SUM("Physical Items"."Fund Measures"."Fund Expenditure" BY "PO Line"."PO Line Reference")
 - Fund Expenditure by Copies:
 - REPORT_SUM("Physical Items"."Fund Measures"."Fund Expenditure" BY "PO Line"."PO Line Reference") * (CAST("Holding Details"."Copy Id" AS int)) / (REPORT_SUM(CAST("Holding Details"."Copy Id" AS int) BY "PO Line"."PO Line Reference"))
 - Number of Copies:
 - CAST("Holding Details"."Copy Id" AS int)
 - Percentage:
 - CAST("Holding Details"."Copy Id" AS int) / REPORT_SUM(CAST("Holding Details"."Copy Id" AS int) BY "PO Line"."PO Line Reference") * 100
- This document created from SF case 00913226



• In case you mee the following error:



• Change the column aggregation rule to: None

FolderHeading	Fund Measures
Column Heading	Fund Exp.
	Custom Headings
Aggregation Rule (Totals Row)	Default (Sum) 🔹



THANK YOU

ChinaSupport@exlibrisgroup.com



All About Letters Configuration HTML, XSL, and CSS



Basic Scenario – Letters Configuration

- Letters: Use XSLT to compose HTML from XML
 - Source: XML
 - Processer: XSL
 - Result: TXT (HTML, XML...)

<?xml version="1.0"?>

Title: No Such A Book Description: Some Description Author: Author A. Due Date: 2021/03/02 Library: Main Library





Tool for Testing XSL

• XSLT Validator & Tester - Online Toolz (online-toolz.com)

XML Input	XSL Input
<item_loans></item_loans>	< <u>xsl:stylesheet</u> version="1.0"
< <u>item_loan</u> >	<pre>xmlns:xsl="http://www.w3.org/1999/XSL/Transform"></pre>
<author>Author A.</author>	<pre><xsl:template match="/item_loans/item_loan"></xsl:template></pre>
<description>Some Description<td><pre>> Title: <xsl:value-of select="title"></xsl:value-of></pre></td></description>	<pre>> Title: <xsl:value-of select="title"></xsl:value-of></pre>
< <u>due_date</u> >2021/03/02 <u due_date>	Description: < <u>xsl:value-of</u> select="description"/>
< <u>library_name</u> >Main_Library <u library_name>	Author: < <u>xsl:value-of</u> select="author"/>
<title>No Such A Book</title>	Due Date: <xsl:value-of select="due date"></xsl:value-of>
<u item_loan>	Library: < <u>xsl;value-of</u> select="library_name"/>
<u item_loans>	
T tarry to E1	
Result	
Result xml version="1.0"?	
Result xml version="1.0"? Title: No Such A Book	
Result xml version="1.0"? Title: No Such A Book Description: Some Description	
Result xml version="1.0"? Title: No Such A Book Description: Some Description Author: Author A.	
Result xml version="1.0"? Title: No Such A Book Description: Some Description Author: Author A. Due Date: 2021/03/02	
Result xml version="1.0"? Title: No Such A Book Description: Some Description Author: Author A. Due Date: 2021/03/02 Library: Main Library	

Letters - Ex Libris Knowledge Center (exlibrisgroup.com)

- Tips for using XSLT for Letter Configuration
- Next slides summarize the presentations and documents



Hide empty fields - IF

• IF the description is empty, do not show it in output.





Replace String – WHEN CONTAINS, OTHERWISE

*** Main Library *** -> *** North Library ***



This is part of the XSLT script that convert the Library Name field



Recursive Replace – TEMPLATE, PARAM

- Replace all specific string within one XML tag
 - Main Library (Main Campus) -> North Library (North Campus)



ExLibris

Throw Error – MESSAGE, TERMINATE

• Terminate the XSLT transform process or cancel the letter





Date & Time – TRANSLATE, CONCAT, SUBSTRING

• Take the advantage of XSLT extensions from exslt.org:



For more information about date and other EXLT extensions, refer to <u>http://exslt.org/</u>



Barcode – This deserves a specific document

- For showing scannable barcode instead of numbers
- Install barcode font to the computer that will show it.

•	 Free Barcode 	e Font - Code 39	<u> TrueType</u>	🎄 Free 3 of 9 Regular (TrueType) — 🗆 🗙
• Cł	neck the fo	nt in Word	Print Install Font name: Free 3 of 9 Version: Version 1.01	
File Ho	me Insert Design	Layout References	Mailings Review	/ TrueType Outlines
	Erro 2 of 0			abcdefobiikimnongrstuvwxyz
Paste	Theme Fonts			12 helquick brown fox liumps over the lazy dool 11 5D(
v 🗳	Cambria	(Headings)		²⁴ he quick brown fox jumr
	Calibri	(Body)		
	SimSun	(Headings)		
	SimSun	(Body)		
	Recently Used Fonts			
	Free 3 of 9			
	All Fonts			
	Abadi	\odot		

ExLibris

Barcode – Continues

• Wrap the barcode field with a font specified span tag

```
<xsl:value-of select="item_loan/title"/>
<xsl:value-of select="physical_item_display_for_printing/library_name"/>
<xsl:value-of select="item_loan/loan_date"/>
<xsl:value-of select="item_loan/due_date"/>
<xsl:value-of select="item_loan/due_date"/>
<xsl:value-of select="item_loan/due_date"/>
```

- You cannot test the barcode with system letter in Alma
 - Since the web server that carries Alma does not have the font
- Send the letter via email to the computer that has the font
- Caution:
 - The font is defined in the HTML code of the received letter
 - Numeric barcode will show if the recipient does not have font
- You can specify and install any other barcode font



Basic of the Basics – all about inline HTML style

- You can use tags <> to customize text format or layout.
- Most HTML tags appear in pairs with opening and closing.
- For example:
 - tag can make text bold like this: BOLD
 - <i> tag can make text make text italic like: *ITALIC*
 - <center> put the enclosed text horizontally centered
 -
 tag creates more space between lines
 - tag can create URL links or email links
 - use a different font color for wrapped text
 - use a different font size for wrapped text
 - More options per your exploration online...



Bonus – Use CSS to create responsive data table

- Some letters on mobile screen deserve an adaptive layout
 - The letter shows as a table when the device width is wide
 - The letter changes into a list when the device width is limited

外借图书				
题名	作 者	原应还日期	新应还日期	图书馆
微观经济学:中级应用教程 . = Microeconomics:an intermediate application	李健	24/05/2021 23:59:00 CST	20/05/2021 23:59:00 CST	琳恩图书
course / 字健土痈				馆
微观经济学 : 中级应用教程		24/05/2021	20/05/2021	琳因
. = Microeconomics:an intermediate application	李健	23:59:00	23:59:00	图
course / 李健主编	002	CST	CST	书 馆
				琳
	李	24/05/2021	20/05/2021	恩
	-	23 Burnin	23 Burnin	•

• Only requires minor modification to the letter template



Bonus – Define the CSS in the style.xsl

- General > Letters > Components Configuration > style.xsl
 - Create a new template with name "responsiveStyle"
 - Take the advice and source code from This Blog

< style.xsl	
Labels Ten	nplate
	Restore
Xsl:	<xsl:template name="responsiveStyle"> <style></style></xsl:template>

/* Label the data

*/

#loanStatusNoticeCN td:nth-of-type(1):before { content: "题名"; } #loanStatusNoticeCN td:nth-of-type(2):before { content: "作者"; } #loanStatusNoticeCN td:nth-of-type(3):before { content: "原应还日期"; } #loanStatusNoticeCN td:nth-of-type(4):before { content: "新应还日期"; } #loanStatusNoticeCN td:nth-of-type(5):before { content: "图书馆"; }

#loanStatusNoticeEN td:nth-of-type(1):before { content: "Title"; }
#loanStatusNoticeEN td:nth-of-type(2):before { content: "Author"; }
#loanStatusNoticeEN td:nth-of-type(3):before { content: "Old Due Date"; }
#loanStatusNoticeEN td:nth-of-type(4):before { content: "New Due Date"; }
#loanStatusNoticeEN td:nth-of-type(5):before { content: "Library"; }

Depending on the ID of the table: Add CN and EN labels to the list respectively



Bonus – Apply the style and ID the tables

- The minor modifications to the letter template
 - Applying the newly created "responsiveStyle"



• Adding IDs to the CN and EN tables respectively

 <xsl:attribute name="style"> <xsl:call-template name="mainTableStyleCss" /> <!-- style.xsl --> </xsl:attribute> <thead>

 <xsl:attribute name="style"> <xsl:call-template name="mainTableStyleCss" /> <!-- style.xsl --> </xsl:attribute> <thead>

• Test with real mail and device, for compatibility issues...



Bonus – Apply the style and ID the tables

- The workaround or fallback: static list styled table
 - Applying the newly created "responsiveStyle"



• Adding IDs to the CN and EN tables respectively

 <xsl:attribute name="style"> <xsl:call-template name="mainTableStyleCss" /> <!-- style.xsl --> </xsl:attribute> <thead>

 <xsl:attribute name="style"> <xsl:call-template name="mainTableStyleCss" /> <!-- style.xsl --> </xsl:attribute> <thead>

• Test with real mail and device, for compatibility issues...



Tips and Tricks – all about making things better

- Check the source XML to see what materials you can use
- Think about what to compose or what condition to make
- Import bib metadata or user info to enrich the XML.
- Check more inspiring XSLT extensions at <u>http://exslt.org/</u>.

• The Last Candy: Skip duplicated XML element or branch

```
<identifiers>
<code_value>
<code>Primary Identifier</code>
<value>111111</value>
</code_value>
<code_value>
<code>01</code>
<value>222222</value>
</code_value>
</code_value>
</code_value>
</code_value>
```

Use tag_name[X] to specify the Xth branch or element in the XML

/identifiers/code_value[2]/value



THANK YOU

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Ex Libris China Support Team



Introduction

Topics

- OAS: Oracle Analytics Server
- DV: Data Visualization

Availability

- Since Jan 2021, Alma users in CN have OAS and DV
- Relies on Analytics, DV is only available in Production ENV

Reference

• OAS (Oracle Analytics Server) and Data Visualization (DV)


Basic - Analytics and Data Visualization are One

It is the same Catalog in Data Visualization and Analytics

Analytics			? 🕒
	□目录		创建
	我的文件夹 共享文件夹	搜索	Q 排序依据 修改时间 ▼ 🔳 🏭
● 数据	类型 名称	说明	所有者 修改时间 🔻
机器学习	슈 🏵 DEMO - Analytics Report		HE_132915 几分钟前
米 控制台	다. DEMO - DV Project		HE_132915 几分钟前
			? 🤇
k▼ ⊕ ⊡ ⊑ < ⊞▼	🐘 🖉 🔤 💌 😁 🗶 🏥 🛗 🛛 Location My Folders		✓ ☐ Show Hidden Items
िर छ हे। ि ् स र Folders है: के	Type All V Sort Name A-Z V Sho	w More Details	▼ Show Hidden Items
Folders E En V	Type All Sort Name A-Z Sho Image: Sort DEMO - Analytics Report Last Modified 2021-3-17 1:47 Open Edit More ▼	2w More Details 7:54 │ Owner HE_13291510000541_575_	Show Hidden Items D_cn01.alma.exlibrisgroup.com



• Date Type: drag and drop to filter bar > options to set filter





• Num Type: drag and drop to filter bar > options to set filter



- Manually input the filter value or use Max or Min
 - You can drag the sliders (range indicators) when they are available



• List Type: drag and drop to filter bar > options to set filter



- Choose optional values in left, chosen one appears on the right
- Conditional search the optional filter fields
- Filter could be set to be a reverse filter (exclude values)



• Expression: Filters > Add Expression Filter...



Use Case 1 - Replace specific characters in a text field

- Analytics > Data Visualization > Create > Project
- Add Data Set > Subject Areas > Fulfillment > Add to Project
- Search > Policy Name > Add Filter
 - Notice mix usage of Month and month
- Add Calculation > Policy Name Rev
 - Drag in Policy Name from the left
 - Search function with "replace"
- Rewrite the function script to:
 - REPLACE(Policy Name, 'week', 'Week')





Use Case 1 – Replace specific characters in a text field

- My Calculation > Drag in Policy Name Rev > Check the result
- Use REPLACE recursively for replacing other characters:
 - REPLACE(REPLACE(Policy Name, 'week', 'Week'), 'hour', 'Hour')
 - There is no technical limit on the recursive usage of REPLACE



- Reference
 - How to use functions on fields in Alma Analytics Data Visualization



- Usage Data > Usage Data Filter > Add Filters > Previous Year
- Select the following fields and add them to view:
 - Usage Date > Usage Date Year
 - Platform > Platform
 - Usage Data Details Release 5 > Usage Measures Total

Usage Date Filter Previous Year							n ∩ <	8	=
表 ▼	Usa	age Date Year, Platfo	orm, Usage Meas	sures Total					
			Usage Date Year	Platform	Usage Measures Total				
1 行			2020	ACS	6,947,642.00	^			
Usage Date Year			2020	ACS Publications	697,742.00				
			2020	AMA Manual of Style	124.00				
A Platform			2020	AMS	2,077.00				
# Usage Measures Total			2020	APS	1,430,246.00				
			2020	American National Biography	37.00				

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- After confirm the result > Remove Usage Date Year field
- Drag Usage Measures Total from left column to top filter bar
- After adding the filter > Choose to filter out the top 10



Drag this field may make it lost

• Do NOT drag the field in the view, if you did carefully put it back



• Duplicate Visualization > Change Visualization Type (bar)

Usage Date Filter Previous Year	Usage Measur 前 10	res Total			5 0 > 5 C
	-	Platform, Usage Measures	s Total		(in ka
]	Platform	n Usage Measures Total	用作筛选器
行			ACS	6,947,642.00	添加统计信息 ▶
A Platform			APS	1,430,246.00	编辑 🕨
			Gale	3,251,152.00	
Usage Measures Tota	1		JSTOR	4,863,768.00	删除可视化
]	ProQuest	13,020,690.00	
Usage Date Filter Previous Year	Usage Measur 前 10	es Total			
	*	Platform, Usage Measures	Total	Platform, Usage Mea	sures Total 🛛 🦉 🔳 🖉 🔳
		Platform	Usage Measures Total	Platfo	orm Usage Measures 更改可视化类型
行		ACS	6,947,642.00	ACS	6,947,642.00
A Platform		APS	1,430,246.00	APS	1,430,246.00
		Gale	3,251,152.00	Gale	3,251,152.00
🐺 Usage Measures Tota		JSTOR	4,863,768.00	JSTOR	4,863,768.00
		ProQuest	13 020 690 00	ProQuest	13 020 600 00



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• Sort the table and the graph

Platfo	rm, Usage Measures Total	
	Platform	Usage Measures Tot <mark>i</mark> l 韋
	ScienceDirect licensed content	15,396,760.00
	ProQuest	13,020,690.00
	SpringerLink	11,298,495.00
	Wiley Online Library	9,189,251.00



• Share the result in the format of PPTX, PDF, PNG, or CSV:

Usage Date Filter Previous Year	Usage Measure 前 10	s Total						≣ <mark>ଜ <</mark> ⊂ ⊂
	*	Platfor	m, Usage Measures Total		按 Platform 列出	共享		
			Platform	Usage Measures Total 🔻	18.00M			
格状图列			ScienceDirect licensed content	15,396,760.00		XIT	1101	
k			ProQuest	13,020,690.00	15.00M			



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Use Case 3 - the most and the least of Usage Total

- Create Project > Add Data Set > Subject Area > E-Inventory
- Add Fiscal Period Filter to filter bar > Choose Previous Fiscal Year
- Drag Fiscal Period Start End to view > For checking the filter
- Add Usage Total and Platform (from COUNTER...) to view

Fiscal Period Filter Previous Fiscal Year		で ~ べ の 三				
	Fiscal Period Start En	d, Usage - Votal, Platfo	orm (from CO	UNTER report)		
		Fiscal Period Start End	Usage - Total	Platform (from COUNTER report)		
1 行		20200101 - 20201231	0.00		-	
A Fiscal Period		20200101 - 20201231	190,221.00	ACS Publications		
		20200101 - 20201231	1,520,802.00	APS		
# Usage - Total		20200101 - 20201231	26,753.00	American Society of Civil Engineers		
A Diatform (fro		20200101 - 20201231	165,388.24	Cambridge Core		
		20200101 - 20201231	3,884.00	ICE Virtual Library		



Use Case 3 - the most and the least of Usage Total

• Use introduced method to filter out the top 5 and sort them

Fiscal Period Filter Previous Fiscal Year	Usage - Total 前 5			n (2	<	8	Ξ
	Usage - Total, Platform (from COUNTER	report)					
		Usage - Tota 💌	Platform (from COUNTER report)				
1 行		9,474,332.00	SpringerLink				
# Usage - Total		3,843,893.31	ScienceDirect licensed content				
- Osuge rotar		1,520,802.00	APS				
A Platform (fro		684,177.21	ProQuest				
		570,900.00	IEEE Xplore				

Let System decide	Usage - Total, Platform (from COUNTER report)						
which fits the	tet has been been been been	Usage - Total 💌	Platform (from COUNTER report)				
which his the		9,474,332.00	SpringerLink				
data the best		3,843,893.31	ScienceDirect licensed content				
		1,520,802.00	APS				
		684,177.21	ProQuest				
		570,900.00	IEEE Xplore				



Use Case 3 - the most and the least of Usage Total

Menu > Edit > Duplicate Visualization



16

Use Case 4 - import external data for Analytics and DV

• Bring in translation to Analytics or DV from external data





Use Case 4 - import external data for Analytics and DV

- 1. Create a new data set by uploading external data in DV
- 2. Create a project with the data sets that need linking fields
 - You can create project from the new data set directly
 - Then add other subject area to the project
- 3. Go to Prepare > Data Diagrams > Add Match (Linking)
- 4. Add the linked data and the data in concern into view
 - In DEMO, they are the CN library name and the number of loans
- 5. Add filters and apply sorting to the table if it is necessary
- 6. Duplicate the view and visualize the table side by side



Thank you!

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