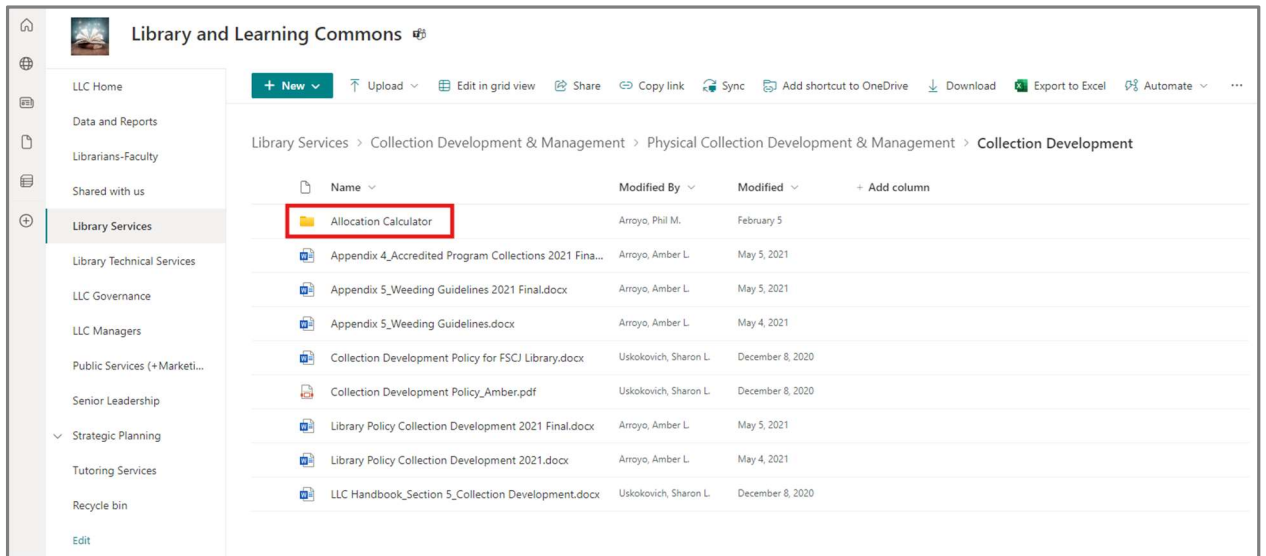# Using Allocation Calculator

These instructions provide a step by step guide for comparing Alma data of physical items purchased this fiscal year with the suggested allocation percentages for your campus.

Setting up the calculator for the year

1. Locate the *Collection Development* folder through the *Library and Learning Commons* site in SharePoint:
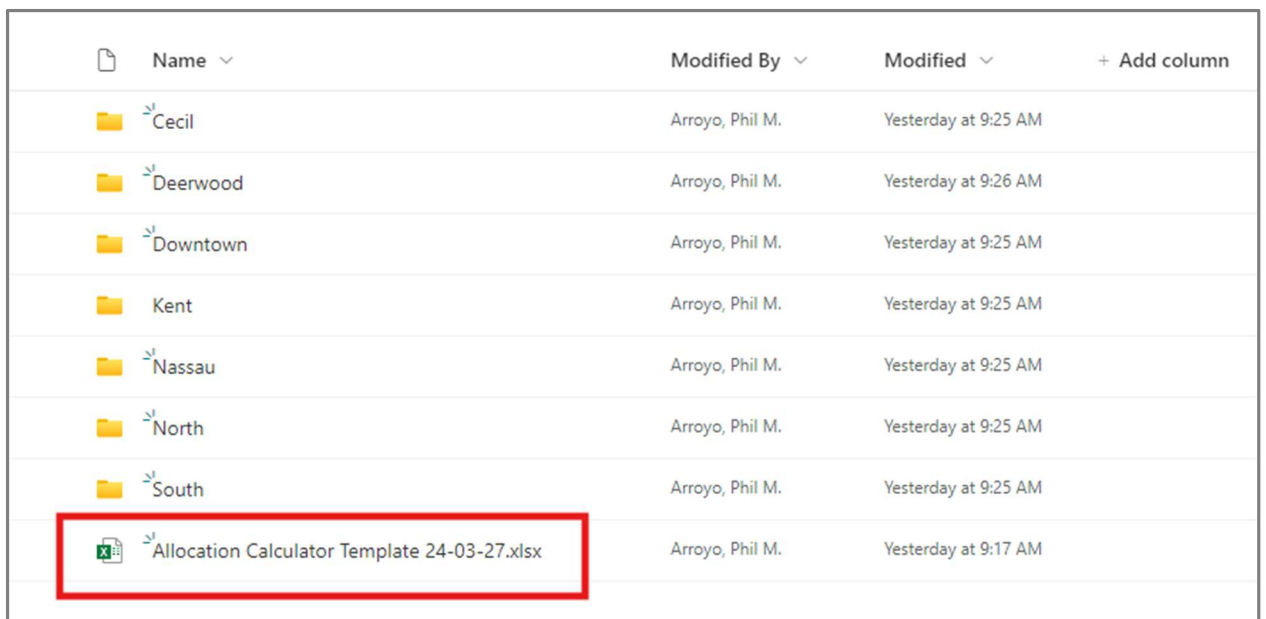
2. Navigate to the *Allocation Calculator* folder:

3. Download the *Allocation Calculator Template* excel file:

4. Reference your campus' allocation percentages (emailed at the beginning of each fiscal year):

	Call Number Categories	%Library Allocation (2022-23)	Circulation	Course Offering	%Library Allocation (2023-2024)
	KENT				
1	Arts/Comm/Design	46.23499411	369	89	46.0613259
2	Business	5.636217136	30	27	5.432022428
3	Education/Law	7.26049496	45	7	5.222989419
4	Health	9.577436417	55	42	9.28401286
5	Industry/Manufacturing	1.320013857	5	17	1.934743785
6	Public Safety	3.204902241	28	6	3.326893265
7	STEM	17.27009933	79	90	16.09168194
8	Human Services/Social Sci	9.495841942	84	46	12.6463304
	Total	100	695	327	100

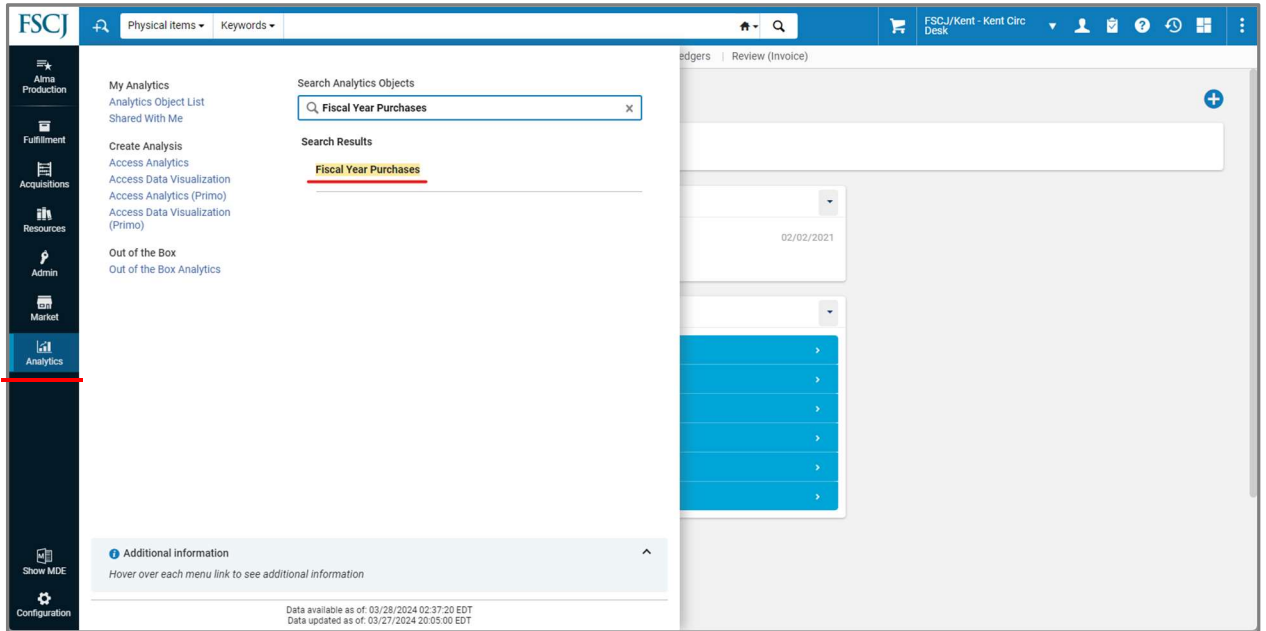5. Copy (Ctrl+C) and Paste (Ctrl+V) the target allocation percentages into the *Allocation %* column:

6. Enter the total amount that your campus intends to spend on physical materials this year into the *Dedicated Budget* area:

Running the Fiscal Year Purchases Report
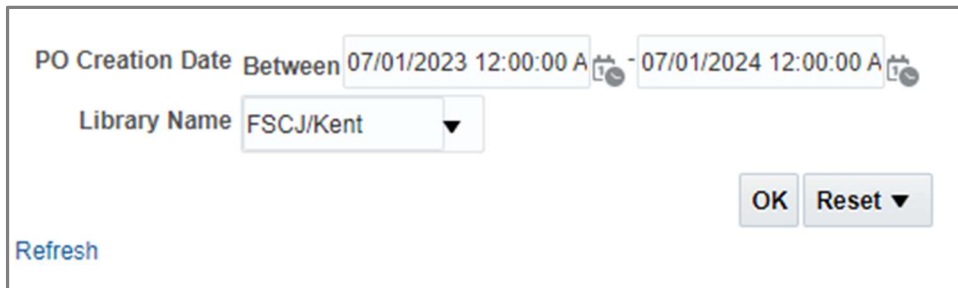
1. In Alma, navigate to the *Analytics* tab, and search for *Fiscal Year Purchases*:

2. Select the desired campus and set the date range for July 1st – July 1st for the desired fiscal year:

3. To download the report, scroll to the bottom, select Export –> Formatted –> Excel:

Updating the calculator

1. Open the Excel file for the Fiscal Year Purchases report and select cell A1:

2. Scroll to the bottom of the data and select the furthest right cell containing information while holding the Shift key to highlight everything. Copy the information (Ctrl+C):

3. In your *Allocation Calculator*, go to the Purchases tab, select cell A1 and Paste (Ctrl+V):
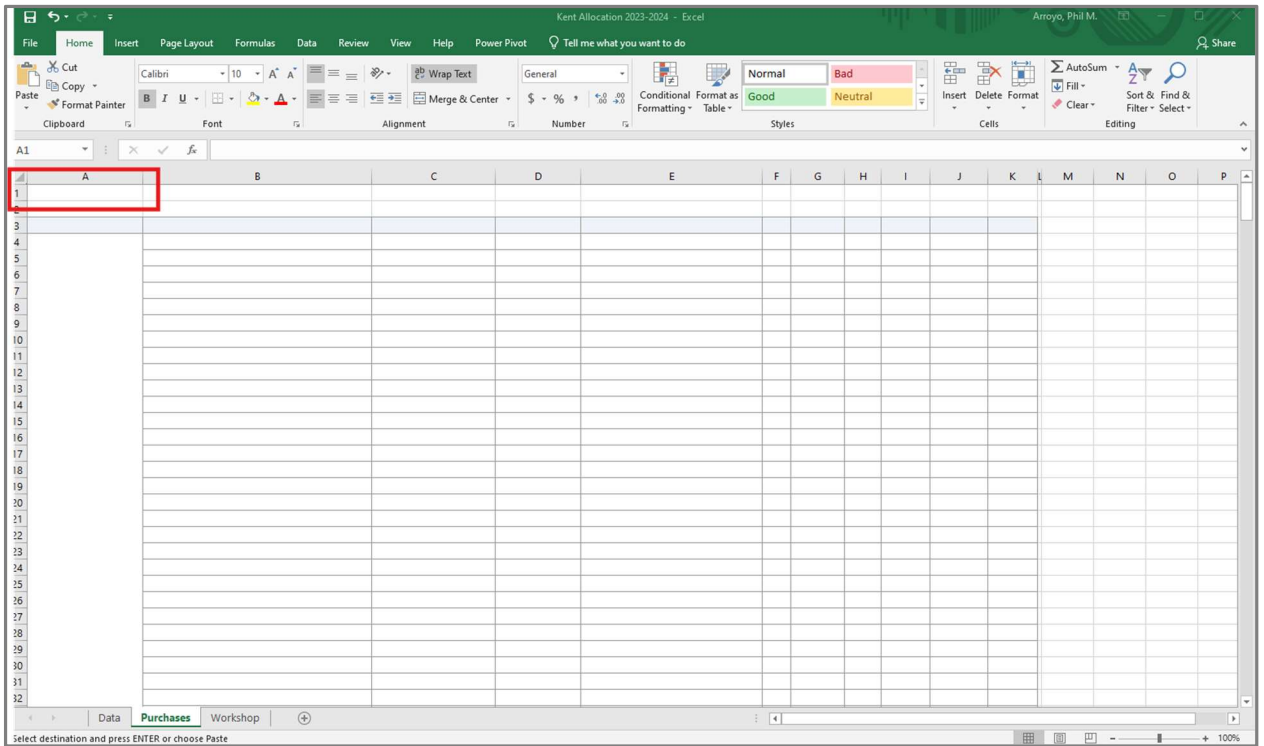
4. On the *Data* tab in your *Allocation Calculator*, your spending progress should have updated: