Griffith: A Beginner's Experience With Design Analytics

A Beginner's Experience With Design Analytics

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Introduction

- 1. Identify the problem.
 - The what
 - The why
- 2. Find a solution
 - Gathering the data(Analytics approach)
 - Applying a fix
- 3. Progress
 - Where are we now?
 - Lessons learned

Post-Migration Cleanup

- Electronic Resources
- Withdrawn barcodes
- Process types
- Item type vs Material type/Item policy

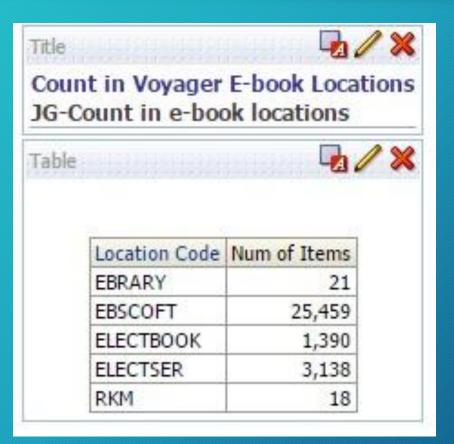
- Electronic resources migrated as physical items instead of portfolios.
- Voyager: Vendors had unique locations in holdings record. Included 856 field with URL on Bib/Holdings records for access.

Book	View Now F	ind It Details Virtu	al Browse			
	Morehead Stat	te University		Sign-in for more	Sign-in for more options	
	Request Option	is: Request It⊡⊉				
2	Location	Camden-Carroll Li ELECTRONIC	brary - Morehead S	tate University ELECTRONIC BOOK	Hide Details	
	Availability:	(1 copy, 1 available	e, 0 requests)			
				1 - 1 of 1 Records		
	Barcode	Туре	Policy	Description	Status	

1. Created an analysis to show the total amount of items in Voyager electronic locations.

- New>Analysis>Physical Items
- Add Location Code Attribute (under Location) and filter desired locations
- Add Num. of items measure (under Physical Item Details)

🗆 Subject Areas 🛛 🆓 🕅						
M Physical Items	Selected Columns					
 Physical Item Details Holding Details Item Creation Date 	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, by clicking or hovering over the button next to its name.					
 	Location Physical Item Details					
 	♥ Sort > 𝔅 Edit formula					
⊞	Column Properties					
표 🛅 PO Line	E Filters Filter					
⊞	Add filters to the an Relete potion for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved button after selecting its name in the catalog pane.					



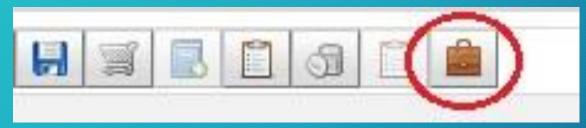
2. Created a more detailed report for each location, including Bib information and unique identifiers.

M Physical Items	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 clicking or hovering over the button next to its name.					
Generation Date Details	Location Bibliographic Details					
 	Location Name 🚌 目 Title 🚍 E Author 🚝 E Material Type 🚝 E MMS Id 🚝					
E PO Line	∃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 o button after selecting its name in the catalog pane.					
	The control of the co					

🗆 Subject Areas 🛛 🖓 🚷	<u></u> → <u></u>	· 🔒 🚷 🛛 🗣 -	🔗 😭 🚟 🎭 🗃 🗃 💀 👾 4월				
🖃 🕅 Physical Items	Compound Layout						
🗉 🧰 Physical Item Details							
🕀 🛅 Holding Details	Title EBSCOFT						
🗄 🛄 Item Creation Date							
🗄 🛅 Item Modification Date	Table						
Bibliographic Details							
Library Unit Location							
					1 (M) (M) (M)		
Dewey Classifications	Location	MMS Id	Title	Author	Mater		
Dewey classifications Temporary Location	Name EBSCO Full	001600105202620	Electrical construction and maintenance.		Type Journa		
PO Line	Text		Hospitals & health networks /		Journ		
For Line Formation - Under Constr	1 CAL		Measurement and evaluation in counseling and development.		Journ		
		991692765302639			Journ		
			The Christian Science monitor.		Journ		
		991694235302639			Journ		
			Macworld : the Macintosh magazine.		Journ		
			Economic development review.		Journ		
		991697645302639			Journ		
			Research & development.		Journ		
			Advanced materials & processes.		Journ		
			Romance quarterly.		Journ		
		991734585302639	Home mechanix.		Journ		
		991739635302639	Military history.		Journ		
		991739645302639	The bulletin of the Association for Business Communication.		Journ		
•		991750645302639	The journal of computer information systems.		Journ		
		991752725302639	Scholastic choices.		Journ		
🗆 Catalog 😤 💩 🖉 🔞		991753335302639	Topics in clinical nutrition.		Journ		
List All			Journal of multicultural counseling and development.		Journ		
🗄 🧰 My Folders			Vocational education journal.		Journ		
🗄 🚞 Shared Folders			The new American.		Journ		
			The Career development quarterly.		Journ		
			Records management quarterly.		Journ		
		991762265302639			Journ		
		991764725302639			Journ		
			The teaching professor.		Journ		
ebug_newsletter/vol2016/iss1/7			The Journal of real estate research.		Journ		
		001767045202620	Journal of applied business research.		Journ		

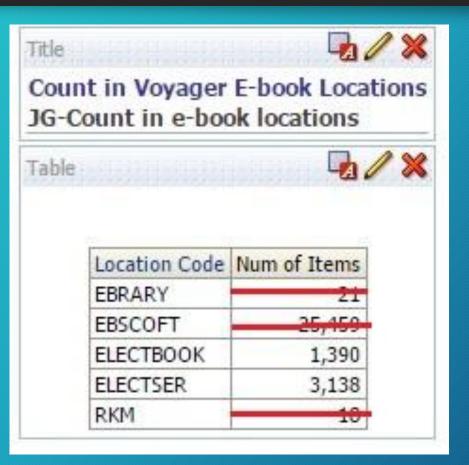
http://digitalcommons.v

3. Manually created portfolios by copying the URL from the 856 field, created a new portfolio, added the URL to the linking field, enable/select proxy, chose electronic material type.



Inventory Information					
Linking Information					
Proxy enabled	●No ()Yes		Proxy selected	•	
Availability status	○Inactive ●Active				
Electronic material type ublished by TopSCHOLAR*, 2016		•			

Electronic Resources - Progress



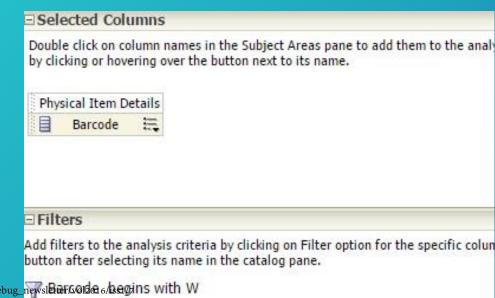
- We had several thousand withdrawn barcodes that migrated over from Voyager.
- Could not delete items with an attached P.O. or items that had an outstanding fee changed barcode to "WITHDRAWN" for easy reporting in Voyager.

1 Status: Item not in place Item Policy: BOOK Material Type: Book Status: Item not in place Item Policy: BOOK Material Type: Book

	Great religions of the world.	
Location	Main Collection Call #: 291 N277G	
<u>B</u> arcode:	WITHDRAWN Temp. Loc.:	
er <u>m</u> . Loc.:	Main Collection Temp. Type:	•
tem <u>T</u> ype:	BOOK Media Type:	
Chron:		
Caption:		
Caption:		

1. Created an analysis pulling in all Withdrawn barcodes.

- New>Analysis>Physical Items
- Added Barcode Attribute (under Physical Items)
- Filtered using "W" to catch any misspellings



Barcode△▽ WDMFHD WIITHDRAWN WIOTHDRAWN-395586 WIOTHDRAWN-484556 WITDHDRAWN WITHDERAWN WITHDRAW-296307 WITHDRAW-415834 WITHDRAW-425907 WITHDRAW-521898 WITHDRAW-537568 WITHDRAW-5439 WITHDRAW-567939 WITHDRAW-591005 WITHDRAW-726038 WITHDRAWL WITHDRAWN-100518

http://digitalcommons.wku.edu/ebug_newsletter/solda 6/280/2115 with W

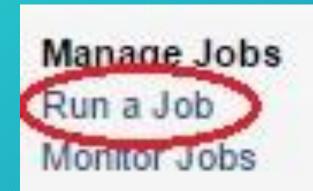
2. Built a set containing all barcodes in Excel and uploaded it into Alma.

- Alma>Resource Management>Manage Sets
- Add set>Itemized
- Fill in set name, set content type (in this case Physical Items), upload file, click save.

RESOURCE MANAGEMENT							
Search and Sets Repository Search Manage Sets Manage Exports	n Set name * Description Note	Withdrawn barcodes					
Manage Collections	Set content type *		•		Yes No No		
Add Set	Created by Content Origin			Updated by	06/09/2016 11:42:01 EDT Ex Libris		
Logical	n File to Set						
Itemized	File	Withdrawn barcodes.xls		The maximum file size is 10 MB.		Cancel Add Members to	o Set Save

3. Ran the "Withdraw items" job; delete bib/holdings records if possible.

- Alma>Administration>Manage Jobs>Run a job
- Choose "Withdraw items" and click next
- Under Task Parameters, choose "Delete holdings; delete bibliographic records that have no other holdings, click next.



http://digitalcomme

	⇔ Name
0	Withdraw items
0	Withdraw digital representations
0	Update/Notify Users
0	Unlink bib records from authority records
0	Synchronize MMS with national catalog
0	Synchronize Bib records with external catalog

. 🔘	VHS with item type other	Itemized	Physical items
۲	Withdrawn barcodes	Itemized	Physical items
nons.wku.edu/ebug_new	sletter/vol2016/iss1/7 Withdrawn barcodes with enum	Itemized	Physical items

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Withdrawn Barcodes

Task Parameters: Withdraw items	
How to handle holdings without items and bibliographic records?	Keep holdings and bibliographic records
	Delete holdings; delete bibliographic records that have no other holdings
	Suppress holdings from publishing; suppress bibliographic records that have no other holdings from publishing
	O Delete holdings; suppress bibliographic records that have no other holdings from publishing
Do not withdraw items with active requests	
Do not withdraw items with non-active requests in the queue	
Do not withdraw items with work orders	

Choose "As soon as possible," click Next, click Submit

Schedule Job	Columns 👻 📑 Tools
1 As soon as possible	
	Back Cancel Next

Back Cancel

Next

Withdrawn Barcodes - Progress



- Of 6,595 items with withdrawn barcodes, 5,204 were deleted.
- The remaining 1,391? Lost Items
- What I learned: Importance of Process Type

Withdrawn Barcodes - Progress

🗆 Subject Areas 🛛 🔞 🕅		
Enum E	Selected Columns	⊉ 1ª
Enum F Enum G Chum H	Double click on column names in the Subject Areas pane to add them to the analysis, by clicking or hovering over the button next to its name.	Selected Columns
Expected Arrival Date Fulfillment Note IP IEP	Physical Item Details	Double click on column names in the Subject Areas pane to add the by clicking or hovering over the button next to its name.
Internal Note 2	New Filter	Physical Item Details
Internal Note 3 Inventory Date Inventory Number Inventory Price Is Magnetic Item Id	Column Process Type Operator is not equal to / is not in Value Lost Add More Options v Clear All	Barcode 🗮 目 Process Type 🗮
artem Policy art Loan Date art Lifecycle	Protect Filter	□Filters
Haterial Type Modification Date Modified By	Convert this filter to SQL	Add filters to the analysis criteria by clicking on Filter option for the button after selecting its name in the catalog pane.
 Originating System Id Pieces Process Type 		Process Type is not equal to / is not in Lost
Provenance Code Receiving Date Receiving Date And Time	Help OK Cancel	
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Process Types

Column	Process Type 📆		
Operator	is equal to / is in	•	
Value			- 6
8	Loan		
Protect	Lost		
_ Hotel	Missing		
Convert	None		
	Requested		
	Resource Sharing Request		
	Technical - Migration		
	Transit		-
	Search Limited Values All Values		1

Process Types

- Created an analysis of items in each Process Type.
 - Add Process Type Attribute (under Physical Items) and Num. of Items Measure.
- What is Technical-Migration? Why are there so many items?

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis by clicking or hovering over the button next to its name.

Physical Item Details

process type stats	1
Table	
Process Type	Num of Items
Acquisition	184
Hold Shelf	7
In Process	14
Loan	5,188
Lost	1,626
Missing	189
None	499,129
Technical - Migration	5,082
a strate to a grade a strate	

- 1. Created an analysis of all items in the Technical-Migration Process Type
 - Process Type, Barcode attributes (Physical Item Details) and Title, Author, Suppressed from Discover attributes (Bibliographic Details).
 - Filter Process Type is equal to/is in Technical-Migration.

Comparison and restored a transmission of the second s						
Physical Item Details E	Bibliographic	Details		P	ysical Item D	etails
Process Type 🗮	Title 🚍	Author 🗮	Suppressed From Discovery		Barcode	=
Filters						

Process Type	Title	Author	Barcode	Suppresse From Discovery
Technical - Migration	"Color-blind" racism /	Carr, Leslie G.	WITHDRAWN- 308817	Yes
Technical - Migration	"O"		WITHDRAWN- 583031	No
Technical - Migration	"O" is for outlaw	Grafton, Sue.	WITHDRAWN- 446444	Yes
	'Salem's Lot /	King, Stephen, 1947-	WITHDRAWN- 276397	Yes
Technical - Migration	1 on 1	Gardner, Howard.	WITHDRAWN- 491316	Yes
Technical	100 facts about Mexico		WITHDRAWN- 324405	Yes
Migration			WITHDRAWN- 324406	Yes
Technical - Migration	100 ways to enhance self-concept in the classroom : a handbook for teachers and parents /	Canfield, Jack, 1944-	WITHDRAWN- 55754	No
-	101 great answers to the toughest interview questions /	Fry, Ronald W.	WITHDRAWN- 290710	Yes
	102 minutes : the untold story of the fight to survive inside the Twin Towers /	Dwyer, Jim, 1957-	WITHDRAWN- 547312	Yes
	1356 : a novel /	Cornwell, Bernard, author.	WITHDRAWN- 773424	Yes
Technical Migration	1952		WITHDRAWN- 412301	No
	1965 blowin' your mind.		WITHDRAWN- 407658	No

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2. Modified analysis to filter out WITHDRAWN barcodes and exported results.

	names in the Subject Areas pane to add them to the analysis. Once ver the button next to its name.	e added, <mark>d</mark> rag-and-o	drop
		Distant them Date	Lette
	Bibliographic Details	Physical Item Det	
FIDCESS Type	H nice H Author H Suppressed I for Discovery	Barcoue	***
Filters			
	s criteria by clicking on Filter option for the specific column in the name in the catalog pane.	Selected Columns p	pan
	is equal to / is in Technical - Migration		
AND W Barcode does	not contain DRAW		

- 226 items remaining in Technical-Migration. Why?
 - Missing (majority)

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- Lost (System and Library applied; not linked to patron accounts)
- Misc. (Temp. locations, damaged, in processing, etc.)

F M491p	Promises of change /	320763286745	Lost-Library applied	Х	2/3/2015
973.7 M822W	West Virginia and the Civil War, 1861-1863. /	320761007432Z	Damaged	Х	
976.903 W726m	My old Confederate home : a respectable place for Civil War veterans /	320763290995	In Process	х	
378.1662 M388c 2010	Cracking the ACT /	320763289673	Missing	Х	2/18/2014
378.1662 M388c 2013	Cracking the ACT /	320763310508	Missing	Х	10/10/2015
378.1662 R288 2008	The real ACT prep guide : the only official prep guide from the makers of the ACT /	320763266041	Missing	х	4/6/2015
650.14 M969J	Jobs for English majors and other smart people /	3207630375474	Withdrawn	Х	
E C226S	Stellaluna /	320763103541Z	Lost-Library applied	Х	4/21/2014
E L642ta	Tacky the penguin /	320763325980	Temp. location LRC New	х	
ET124i	I love you, little one /	320763173885A	Missing	Х	5/13/2014
F B2613s	The sky so big and black /	320763246746	In process	Х	
F C346a	Awakened /	320763294858	Missing	Х	4/16/2015
F D724C T.ED.	Crime and punishment /	3207600606973	Missing	Х	6/4/2015
F H793c	Crank /	320763277853	Missing	Х	9/7/2014
F M8496n	The night circus : a novel /	11111000031973	Missing	Х	4/16/2015
F.N713m	Midnight for Charlie Bone : children of the red king.	320763223765	Missing	Х	12/9/2015
F P9678a	Anthem of a reluctant prophet /	320763270225	Damaged	Х	

3. Different methods required to resolve issues.

- Other misc. items case by case ; mostly simple solutions.
- For Missing and Lost items older than one year: Ran Withdraw Items job and deleted records.
- For Missing and Lost items within the last year:
 - Created set in Excel and uploaded into Alma.
 - Changed Process Type to Missing via "Change physical items" job.

Change physical items	Update item information for a set of physical items.	Physical item
Change loan to claimed returned	Update item loan status to claimed returned.	Physical item
Change Holding Information	Update holding information for a set of physical items	Physical item

	Tech process items that should be missing	Itemized	Physical items
0	Tech Process items that should be missing 2	Itemized	Physical items

Item policy	NONCIRC	*
Material type		*
Inventory date		ø
Provenance		-
Is Magnetic		*
Receiving date		Ì
Storage Location ID		
PO line		
Missing status	Missing	*
Replacement cost		
Public note	Missing	

Process Types - Progress

- Completely cleared Technical-Migration process type.
- Missing items is now correct in Alma.
- Other process types (such as In Transit) will be addressed later.
- What I learned:
 - Some workflows (i.e. Lost items) had to change.

- Voyager contained one field (Item Type) in the item record that would determine checkout time. This Item Type would also display in public view (ex. CDs had an Item Type of AUDIOCD, DVD/VHS/Blu-Ray had an Item Type of VIDEO).
- Item Status in Voyager was split into Material Type and Item Policy in Alma.
- Result: Most of our media migrated incorrectly for public view (ex. Because the VIDEO policy covered DVDs, VHS tapes and Blu-Rays and "Video" is not a Material Type in Alma, all items migrated as "Other.")

Title:	Marvel's the Avenge	ers [videorecording] / Marvel Studios p	presents in association	on with Par
Location:	LRC DVDS	Call #: 791.4372 M3	91	
<u>B</u> arcode:	320763324218	Temp. <u>L</u> oc.:		÷
er <u>m</u> . Loc.:	LRC DVDS	▼ Temp. Type:		-
tem <u>T</u> ype:	VIDEO	Media Type:		-
Chron: Year: Caption:				
ree text: Spine:				
. A.		Copy: 0 Piece <u>s</u> :	1 Price: \$0.00	27

Resource description Marvel's the Avengers Marvel's The Avengers (Motion picture : 2012) Distributed by Buena Vista Home Entertainment Burbank, Calif. : [201

Summary General Information ENUM/CHRON information III Notes History Barcode [320763324218 Copy ID	E	Holding <u>Camden-C</u> 791.4372 M Barcode 32076332 Iss type -		rehead State University: LRC DVI	<u>):</u>		<u>View all holdings</u> View all items	
Material type DVD Provenance PO line Receiving date 10/24/2012 Image: Section of the policy VIDEO Enumeration A Image: Section of the policy Image: Section of the policy </th <th>Summary</th> <th>General Inf</th> <th>ormation</th> <th>ENUM/CHRON information</th> <th>Notes</th> <th>History</th> <th></th> <th></th>	Summary	General Inf	ormation	ENUM/CHRON information	Notes	History		
Provenance Is Magnetic No PO line Police Receiving date 10/24/2012 Enumeration A Image: State of the state of		Barcode	320763324218			Copy ID)	
PO line Receiving date 10/24/2012 Image: State of the state of t		Material type	DVD	-		Item policy	VIDEO	Y
Receiving date 10/24/2012 Im Im Expected receiving date Im Im Enumeration A Im Im Im Im Im Im Im Im Im Im		Provenance				la Magnetic	140	-
Enumeration A Enumeration B		PO line		21				
		Receiving date	10/24/2012		Expecte	ed receiving date		9
Chronology I Chronology J		Enumeration A				Enumeration B		
						Chronology J		



Video

Captain America. The Winter Soldier

Anthony Russo 1970- film director.; Joe Russo film director.; Christopher Markus screenwriter.; Stephen McFeely screenwriter.; Kevin Feige film producer.; Chris Evans 1981- actor.; Scarlett Johansson 1984- actor.; Sebastian Stan 1982- actor.; Anthony Mackie 1979- actor.; Cobie Smulders 1982- actor.; Frank Grillo 1963- actor.; Emily VanCamp 1986- actor.; Hayley Atwell 1982- actor.; Robert Redford actor.; Samuel L. Jackson actor.; Henry Jackman (Henry Pryce), composer (expression); Trent Opaloch director of photography.; Marvel Studios, production company.; Buena Vista Home Entertainment (Firm), film distribuor, 2014

Available at Camden-Carroll Library LRC DVDS 791.4372 C2541

	Morehead State	University Sign-in for more options	Actionsv ⊡ X
	Request Options	Request It⊡?	
	Location	Camden-Carroll Library - Morehead State University LRC DVDS 791.4372 C2541 Hide Details Locate	
	Availability:	(1 copy, 1 available, 0 requests)	
		1 - 1 of 1 Records	
	Barcode	Type Policy Description Status	
http://digitalcommo	320763321915 ns.wku.edu/ebug_newsletter/vol2016/	DVD Loanable Item in	place

1. Created an analysis containing every item in different multimedia locations (DVD, VHS, CD, Software, etc.)

- Included attributes for Location Code (Location), Title (Bibliographic details), Barcode, Item Policy and Material Type (Physical Item Details).
- For Blu-Rays added an additional attribute for Permanent Call Number (Holding details).
 - Filtered to contain "Blu-Ray" or "Blu Ray" because of call number format.

Location	Bibliographic Details	Physical Item D	Details		Holding Details
目 Location Code 🗮	📋 Title 🗮	目 Barcode 🗮	📋 Item Policy 🗮 📒	Material Type 🗮	🔋 Permanent Call Number 🗮
	10 1		Ma Bhia		
□Filters					
Add filters to the analysi	is criteria by clicking or	n Filter option for	the specific column in t	he Selected Column	s pane, or by clicking on the filter b
button after selecting its	; name in the catalog p	oane.			
V Location Cod	e is equal to / is in	LRCDVDS			
AND Permanent	t Call Number conta	ins all BLU RAY			
OR Permanent	t Call Number conta	ins all BLU-RAY			

2. Built a set containing barcodes in Excel, uploaded into Alma, ran
"Change Physical Items" job to make necessary changes.
Included attributes for Location Code (Location), Title (Bibliographic details).

Change location fields						
	Change Type	Permanent	-	Due Back	[
	New library		×	New location		•
	Remove temporary item indication					
	Remove temporary location fields content					
Change other fields						
	Item policy	VIDEO	-	Condition	Unconditionally	-
	Material type	Blu-Ray		Condition	Unconditionally	*
	Inventory date			Condition	Unconditionally	•
	Provenance		×	Condition	Unconditionally	•
	Is Magnetic			Condition	Unconditionally	

Item Status vs Material Type/Item Policy -Progress

- Successfully updated Material Type for all multimedia collections to clean up public view.
- Ensured that all Item Policies were consistent with Fulfillment Rules.

Collection Development

How can I use Analytics to assist in Collection Development?

- 1. Created an analysis containing information that would assist in weeding items.
 - To pull in the set:
 - Permanent Call Number attribute (under holdings), used range or specific Dewey number.
 - Limit by location (Main Collection or Main Oversize Collection.
 - Bibliographic information:
 - Basic bibliographic attributes (Title, Author, Publication Place, etc.)
 - Fulfillment information:
 - Num of Loans not sum and Last Loan Date (Physical Item Details)

Collection Development

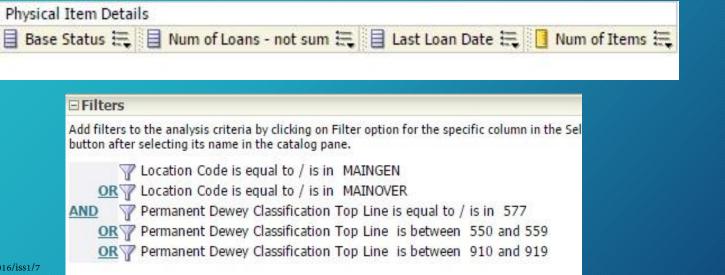
• Other misc. attributes

- Unique Call number
- Network Number (OCLC number)
- Subjects
- Suppressed from Discovery
- Base Status
- Multiple copies?

Collection Development

ding Details	Location	Holding Details	Physical Item Details	Bibliographic Details
Permanent Dewey Classification Top Line	e 🗮 📋 Location Name 🗮	🔋 Permanent Call Number 🗮 目 Copy Id 🗮	📋 Chron I 🗮 目 Enum A 🗮 目 Barcode 🗮	📋 Title 🗮 🗐 Author 🗄

🛿 Publication Place 🗮 📋 Publisher 🗮 📋 Publication Date 🗮 🗒 ISBN 🗮 📄 Edition 🗮 🗐 Subjects 🗮 🗐 Suppressed From Discovery 🗮 🗐 Network Number 🗮



Questions?

• Thank you!