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• Withdrawn barcodes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

• 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.
Electronic Resources

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)
Electronic Resources

Count in Voyager E-book Locations
JG-Count in e-book locations

<table>
<thead>
<tr>
<th>Location Code</th>
<th>Num of Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>EBRARY</td>
<td>21</td>
</tr>
<tr>
<td>EBSCOFT</td>
<td>25,459</td>
</tr>
<tr>
<td>ELECTBOOK</td>
<td>1,390</td>
</tr>
<tr>
<td>ELECTSER</td>
<td>3,138</td>
</tr>
<tr>
<td>RKM</td>
<td>18</td>
</tr>
</tbody>
</table>
2. Created a more detailed report for each location, including Bib information and unique identifiers.
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.
Electronic Resources - Progress

Count in Voyager E-book Locations
JG-Count in e-book locations

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<tr>
<td>RKM</td>
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</table>
Withdrawn Barcodes

• We had several thousand withdrawn barcodes that migrated over from Voyager.
• Could not delete items with an attached P.O. or items that had an outstanding fee - changed barcode to “WITHDRAWN” for easy reporting in Voyager.
Withdrawn Barcodes

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 Created an analysis pulling in all Withdrawn barcodes.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
Withdrawn Barcodes

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.
Withdrawn Barcodes

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.
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
- 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
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
Process Types
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?
Process Types - Technical Migration

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.
## Process Types - Technical Migration

<table>
<thead>
<tr>
<th>Process Type</th>
<th>Title/Author</th>
<th>Barcode</th>
<th>Suppressed From Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Migration</td>
<td>&quot;Color-blind&quot; racism / Carr, Leslie G.</td>
<td>WITHDRAWN-308817</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>&quot;O&quot;</td>
<td>WITHDRAWN-503001</td>
<td>No</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>&quot;O&quot; is for outlaw</td>
<td>WITHDRAWN-4946444</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>Salem's Lot / King, Stephen, 1947-</td>
<td>WITHDRAWN-276397</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>1 on 1</td>
<td>Gardner, Howard.</td>
<td>WITHDRAWN-491316</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>100 facts about Mexico</td>
<td>WITHDRAWN-534055</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>100 ways to enhance self-concept in the classroom : a handbook for teachers and parents / Canfield, Jack, 1944-</td>
<td>WITHDRAWN-557554</td>
<td>No</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>101 great answers to the toughest interview questions / Pry, Ronald W.</td>
<td>WITHDRAWN-290710</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>102 minutes : the untold story of the fight to survive inside the Twin Towers / Dwyer, Jim, 1957-</td>
<td>WITHDRAWN-547312</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>1356 : a novel / Cornwell, Bernard, author.</td>
<td>WITHDRAWN-775424</td>
<td>Yes</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>1952</td>
<td>WITHDRAWN-412301</td>
<td>No</td>
</tr>
<tr>
<td>Technical Migration</td>
<td>1965 blowin' your mind.</td>
<td>WITHDRAWN-407020</td>
<td>No</td>
</tr>
</tbody>
</table>
2. Modified analysis to filter out WITHDRAWN barcodes and exported results.
Process Types - Technical Migration

- 226 items remaining in Technical-Migration. Why?
  - Missing (majority)
  - Lost (System and Library applied; not linked to patron accounts)
  - Misc. (Temp. locations, damaged, in processing, etc.)

<table>
<thead>
<tr>
<th>Item</th>
<th>Title</th>
<th>Status</th>
<th>Location</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>F M49 3p</td>
<td>Promises of change /</td>
<td>Lost-Library applied</td>
<td>X</td>
<td>2/9/2015</td>
</tr>
<tr>
<td>573.7 M822W</td>
<td>West Virginia and the Civil War, 1861-1863. /</td>
<td>Damaged</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>576.903 W72s</td>
<td>My old Confederate home : a respectable place for Civil War veterans /</td>
<td>In Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>378.166 M388c 2010</td>
<td>Cracking the ACT /</td>
<td>Missing</td>
<td>X</td>
<td>2/18/2014</td>
</tr>
<tr>
<td>378.166 M388c 2013</td>
<td>Cracking the ACT /</td>
<td>Missing</td>
<td>X</td>
<td>10/10/2015</td>
</tr>
<tr>
<td>378.1662 R283 2008</td>
<td>The real ACT prep guide : the only official prep guide from the makers of the ACT /</td>
<td>Missing</td>
<td>X</td>
<td>4/6/2015</td>
</tr>
<tr>
<td>650.14 M9693</td>
<td>Jobs for English majors and other smart people /</td>
<td>Withdrawn</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>E C226</td>
<td>Stellulina /</td>
<td>Lost-Library applied</td>
<td>X</td>
<td>4/21/2014</td>
</tr>
<tr>
<td>E L542a</td>
<td>Taddy the penguin /</td>
<td>Temp. location LRC New</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E T124</td>
<td>I love you, little one /</td>
<td>Missing</td>
<td>X</td>
<td>5/13/2014</td>
</tr>
<tr>
<td>F B2613s</td>
<td>The sky so big and black /</td>
<td>In process</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>F C346a</td>
<td>Awakened /</td>
<td>Missing</td>
<td>X</td>
<td>4/16/2015</td>
</tr>
<tr>
<td>F D72+T. ED.</td>
<td>Crime and punishment /</td>
<td>Missing</td>
<td>X</td>
<td>6/4/2015</td>
</tr>
<tr>
<td>F H792c</td>
<td>Conk /</td>
<td>Missing</td>
<td>X</td>
<td>9/7/2014</td>
</tr>
<tr>
<td>F M849s</td>
<td>The night circus : a novel /</td>
<td>Missing</td>
<td>X</td>
<td>4/18/2015</td>
</tr>
<tr>
<td>F P3678a</td>
<td>Anthem of a reluctant prophet /</td>
<td>Damaged</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Process Types - Technical Migration

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.

<table>
<thead>
<tr>
<th>Change physical items</th>
<th>Update item information for a set of physical items.</th>
<th>Physical item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change loan to claimed returned</td>
<td>Update item loan status to claimed returned.</td>
<td>Physical item</td>
</tr>
<tr>
<td>Change Holding Information</td>
<td>Update holding information for a set of physical items</td>
<td>Physical item</td>
</tr>
</tbody>
</table>

Tech process items that should be missing

<table>
<thead>
<tr>
<th>Itemized</th>
<th>Physical items</th>
</tr>
</thead>
</table>

Tech Process items that should be missing 2

<table>
<thead>
<tr>
<th>Itemized</th>
<th>Physical items</th>
</tr>
</thead>
</table>
Process Types - Technical Migration

Change other fields

- Item policy: NONCIRC
- Material type
- Inventory date
- Provenance
- Is Magnetic
- Receiving date
- 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.
Item Status vs Material Type/Item Policy

• 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.”)
Item Status vs Material Type/Item Policy
## Item Status vs Material Type/Item Policy

<table>
<thead>
<tr>
<th>Resource description</th>
<th>Marvel's the Avengers Marvel's The Avengers (Motion picture : 2012) Distributed by Buena Vista Home Entertainment Burbank, Calif : [2012]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holding</td>
<td>Camden-Carroll Library - Morehead State University: LRC DVD: 791.4372 M391</td>
</tr>
<tr>
<td>Barcode</td>
<td>320763324218</td>
</tr>
<tr>
<td>Material type</td>
<td>DVD</td>
</tr>
<tr>
<td>Provenance</td>
<td></td>
</tr>
<tr>
<td>PO line</td>
<td></td>
</tr>
<tr>
<td>Receiving date</td>
<td>10/24/2012</td>
</tr>
<tr>
<td>Expected receiving date</td>
<td></td>
</tr>
<tr>
<td>Copy ID</td>
<td>0</td>
</tr>
<tr>
<td>Item policy</td>
<td>VIDEO</td>
</tr>
<tr>
<td>Is Magnetic</td>
<td>No</td>
</tr>
</tbody>
</table>
Item Status vs Material Type/Item Policy

Captain America. The Winter Soldier
Available at Camden-Carroll Library LRC DVDS 791.4372 C2541

Location
Camden-Carroll Library - Morehead State University
LRC DVDS 791.4372 C2541

Available: (1 copy, 1 available, 0 requests)

Barcode 320763321915

Type: DVD
Policy Loanable
Description
Status Item in place

http://digitalcommons.wku.edu/ebug_newsletter/vol2016/iss1/7
Item Status vs Material Type/Item Policy

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.
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).
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

<table>
<thead>
<tr>
<th>Holding Details</th>
<th>Location</th>
<th>Holding Details</th>
<th>Physical Item Details</th>
<th>Bibliographic Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent Dewey Classification Top Line</td>
<td>Location Name</td>
<td>Permanent Call Number</td>
<td>Copy Id</td>
<td>Chron</td>
</tr>
<tr>
<td>Publication Place</td>
<td>Publisher</td>
<td>Publication Date</td>
<td>ISBN</td>
<td>Edition</td>
</tr>
<tr>
<td>Physical Item Details</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Status</td>
<td>Num of Loans - not sum</td>
<td>Last Loan Date</td>
<td>Num of Items</td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Set button after selecting its name in the catalog pane.

- Location Code is equal to / is in MAINGEN
- Location Code is equal to / is in MAINOVER
- Permanent Dewey Classification Top Line is equal to / is in 577
- Permanent Dewey Classification Top Line is between 550 and 559
- Permanent Dewey Classification Top Line is between 910 and 919

http://digitalcommons.wku.edu/ebug_newsletter/vol2016/iss1/7
Questions?

• Thank you!