



WorldCat Collection Analysis Quick Reference

Accessing Collection Analysis

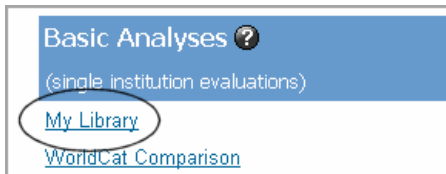
Access to the WorldCat Collection Analysis service is via the OCLC FirstSearch service.

	Action
1	Display the OCLC FirstSearch logon screen at: http://www.firstsearch.oclc.org
2	Enter the authorization and password associated with WorldCat Collection Analysis and select Start .
3	When the FirstSearch screen appears, select the Collection Analysis tab.

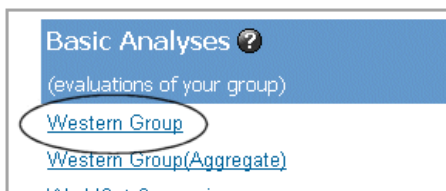
Subscription Type

A library subscribes to the WorldCat Collection Analysis service as either an individual institution or as a member of a group/

Individual institution. At logon, if the first entry under Basic Analyses shows *My Library*, your library has subscribed as an individual institution.



Subscription Group. If the first entry under Basic Analyses shows a group name, your library has subscribed as part of a group.



Analysis Dimensions

OCLC Conspectus

The OCLC® Conspectus is a subject hierarchy consisting of divisions, categories, and subject descriptors. The Conspectus can be used with Dewey® Decimal, Library of Congress and National Library of Medicine classifications. The three levels of the OCLC Conspectus, broadest to most specific, are:

- Division
- Category
- Subject

Publication Date

Dates are grouped into these ranges:

Pre-1500	1900-1924	1990-1994	2004
1500-1599	1925-1949	1995-1999	2005
1600-1699	1950-1950	2000	2006
1700-1799	1960-1969	2110	2007
1800-1849	1970-1979	2002	Other
1850-1899	1980-1989	2003	

Language

Thirty languages from the *MARC Code List for Languages* appear as analysis results. The remaining languages are grouped under *Other*.

Arabic	French	Japanese	Russian
Bulgarian	German	Korean	Spanish
Chinese	Greek, Modern (1453-)	Latin	Swedish
Croatian	Hebrew	Norwegian	Thai
Czech	Hindi	Persian	Turkish
Danish	Hungarian	Polish	Ukrainian
Dutch	Indonesian	Portuguese	Other
English	Italian	Romanian	

Format

The WorldCat Collection Analysis service uses these material types:

Archival Materials	Continually Updated Resources, Electronic	Serial Publications, Electronic
Archival Materials, Electronic	Continually Updated Resources, Microform	Serial Publications, Microform
Archival Materials, Microform	Maps	Sound Recordings
Articles	Maps, Electronic	Sound Recordings, Electronic
Articles, Electronic	Maps, Microform	Sound Recordings, Microform
Articles, Microform	Musical Scores	Texts, Electronic
Books	Musical Scores, Electronic	Visual Materials
Books, Microform	Musical Scores, Microform	Visual Materials, Electronic
Computer Files	Serial Publications	Visual Materials, Microform
Continually Updated Resources		

Audience

The WorldCat Collection Analysis service uses the same levels and the same mapping criteria as the OCLC FirstSearch service: Adult and Juvenile.

Library

When an analysis includes institutions in addition to your library, results may be displayed by individual library name.

Borrower/Lender

For an ILL Analyses a library is identified as either the Borrower or the Lender.

Holding Status

For an ILL Analysis, this dimension shows how many borrowing requests were submitted for items not owned by your library.

Holding Count

For selected analyses, results may be displayed according to the number of libraries that hold a given title.

Shared by

For WorldCat Comparisons, this dimension shows how widely your library's or group's items are held within WorldCat, that is, whether an item is held uniquely by your library/group or held by you and one, two, three (and so on) other libraries.

Request Date

For an ILL Analyses this dimension shows the total number of items requested (Borrower) or shipped (Lender). You can view data by annual or quarterly totals.

Request Frequency

For an ILL Analyses this dimension shows how often a request was submitted (Borrower) or shipped (Lender). You can view aggregate or annual totals.

Request Cost

For an ILL Analyses this dimension shows how much your library paid (in ranges of U.S. dollars) for items you borrowed.

Copy vs. Loan

For an ILL Analysis, this dimension shows how many borrowing requests were submitted for items that the library expects back (books or videos) versus items that it does not expect to be returned (photocopies).

Types of Analyses

The WorldCat Collection Analysis service provides five types of collection analysis.

For Individual Institutions

Individual Library Analysis. This analysis presents your library's holdings according to the selected analysis dimensions.

Individual Library Comparison. This analysis presents your library's holdings compared to the combined titles (duplicates removed) of:

- WorldCat
- An authoritative collection development list
- A Peer Comparison (a group of from one to five libraries that you have selected)
- OCLC-defined groups including OCLC *NetLibrary* and *Ebooks* databases

ILL Analysis. This analysis presents your library's borrowing and lending activity within WorldCat Resource Sharing

For Subscription Groups

Group Analysis. This analysis presents the titles for each library in the Subscription Group according to the selected analysis dimensions.

Aggregated Group Analysis. This analysis presents the combined titles of all group members, with duplicates removed, as though it were a single institution. An Aggregated Group Analysis can be used to compare your group to:

- WorldCat
- Subsets of your own group
- An authoritative collection development list
- OCLC-defined groups including OCLC *NetLibrary* and *Ebooks* databases

Overlap

The Overlap view of an analysis shows the number of titles a library holds in common with other libraries/institutions. The Overlap view is available for Individual Library Comparisons and for Group Analyses.

For an Individual Library Comparison, overlap shows the number of titles that the subscribing library owns jointly with the collective titles (duplicates removed) of its Peer Comparison.

For a Group Analysis, overlap is the number of titles each library owns jointly with another library in the group.

Uniqueness

The Uniqueness view of an analysis shows how broadly a given title is shared among the members of a group, that is, how many of a library's titles are:

- held by it alone
- held by one other member (Shared by 2)
- held by two other members (Shared by 3)

and so on.

The Uniqueness view is available for Individual Library Comparisons and for Group Analyses.

For an Individual Library Comparison, uniqueness shows how many of a library's titles are shared with its Peer Comparison.

For a Group Analysis, uniqueness shows how many of a library's titles are shared with one group member, two group members, three group members, and so on.

Collection Analysis Screens

Data to Analyze

The Data to Analyze screen lists all of the analyses available to your library or group.

Analysis results

The Analysis Results screen presents the results of an analysis in a spreadsheet-style table.

Graph Display

The Graph View presents the data from a single row as a graph. The default display shows:

- The Analysis Results column headings as the x-axis
- The number of titles or holdings as the y-axis
- The name of the row you selected as the graph title

You can view a graph by selecting the **Display Graph**  icon.

Change Analysis

The Change Analysis screen allows you to change the order in which analysis dimensions are applied to an existing analysis. You can:

- Change the column value
- Change the order in which analysis dimensions are applied as rows

Limit Analysis

The Limit Analysis screen allows you to reduce the breadth of an analysis by specifying subsets of one or more analysis dimensions. This enables you to reduce the number of records retrieved and focus information for specific purposes.

You can select subsets of all dimensions. For the OCLC Conspectus, you can select Divisions only; you cannot select down to the level of Category or Subject.

Changing an Analysis

To change column value or row order:

	Action
1	On the Change Analysis screen, open the Data to Analyze field and select the analysis you want to change. Note: If your library subscribes to WorldCat Collection Analysis as an individual institution, your current comparisons are listed under <i>ILL Analyses</i> , <i>Authoritative Lists</i> , <i>Peer Comparisons</i> and <i>Predefined Groups</i> . If your library has subscribed as part of a group, Group and Aggregate Group [identified by (<i>Aggregate</i>) following their name] analyses are listed first. Additional Aggregate Group analyses are listed under <i>Authoritative List</i> , <i>Secondary Groups</i> and <i>Predefined Groups</i> .
2	Select the radio button for the dimension you want to use as the column value.
3	Using the Level lists, select the order in which you want the analysis dimensions to be applied.
4	Select the Run Analysis button. Result: The analysis is run with the new values and an updated Analysis Results screen is displayed.

Limiting an Analysis

To use a subset of an analysis dimension:

	Action
1	On the Limit Analysis screen, for each dimension check the limit(s) that you want to include in the analysis. <ul style="list-style-type: none"> • To include all limits for a given dimension, select Check All. • To clear all limits for a given dimension, select Clear All.
2	Select the Run Analysis button.

Access Collection Analysis Administration



Access to the WorldCat Collection Analysis administrative functions is via the FirstSearch Administrative Module.

	Action
1	Display the OCLC FirstSearch Administrative Module logon screen at: http://www.firstsearch.oclc.org/admin .
2	Enter the Authorization and Password associated with WorldCat Collection Analysis and select Start .
3	When the FirstSearch screen appears, select the Collection Analysis tab. <ul style="list-style-type: none"> If your library subscribes as an individual institution, you will see the Collection Analysis > Comparison screen. If your library subscribes as part of a group, you will see the Collection Analysis > Groups screen.

Creating a Secondary Group (Administrative Module)

Libraries subscribing as part of a Subscription Group can create a subset of the members of the group. For each Secondary Group created, WorldCat Collection Analysis automatically generates both a Group Analysis and an Aggregated Group Analysis.

There is no limit to the number of Secondary Groups that a single authorization can create; however, because groups require a significant amount of storage space, any Secondary Group that is not viewed on the Analysis Results screen for a period of 120 calendar days is automatically deleted.



	Action
1	Enter a name in the Enter Group Analysis Name: field.
2	Select an institution or an existing Secondary Group name in the All Libraries/Groups field, then select the Add  button. Result: The institution name appears in the Groups Included field.
3	Repeat Step 2 at least once or until you have selected all libraries/Secondary Groups that you want to include in the new Secondary Group. Note: If you have accidentally added the wrong library or Secondary Group, select the incorrect name in the Libraries/Groups Included field and then select the Remove  button.
4	Select Save Changes . Result: The Secondary Group is created and the message: Groups screen changes saved: Group Analysis added appears at the top of the screen. Warning: If you leave the screen before you select Save Changes your new group is lost.

Creating a Peer Comparison (Administrative Module)

Libraries subscribing as individual institutions can create Peer Comparisons with from one to five libraries. These libraries must have holdings in WorldCat.

There is no limit to the number of Peer Comparisons that a single authorization can create; however, because groups require a significant amount of storage space, any Peer Comparison that is not viewed on the Analysis Results screen for a period of 120 calendar days is automatically deleted.

Before you begin. You can locate institution symbols in *OCLC Participating Institutions Search*. Keep in mind that a listing in *Participating Institutions* does not guarantee that a library has holdings in WorldCat.


	Action
1	Enter a name in the Enter Group Name: field.
2	Enter an institution symbol (upper or lower case) in the Add Symbols: field, then select the Add  button. Result: The institution name appears in the Libraries in Comparison Group field.
3	Repeat Step 2 until your group contains at least two but no more than five libraries. Note: If you have accidentally entered the wrong institution symbol and added the wrong library, select the incorrect symbol in the Libraries in Comparison Group field and then select the Delete  button.
4	Select Save Changes . Result: The group is created and the message: Library Comparison Groups screen changes saved appears at the top of the screen. Warning 1: If you have entered a symbol for a library that has no holdings in WorldCat, an error message displays. Warning 2: If you leave the screen before you select Save Changes your new group is lost.

Creating an Authoritative List Comparison (Administrative Module)

All subscribing libraries can create a comparison between their holdings and selected authoritative collection development lists such as Booklist, Books for College Libraries and Outstanding Academic titles. This type of comparison is called an *Authoritative List comparison*.

- Libraries subscribing as individual institutions create a comparison between their holdings and the selected collection development list.
- Libraries subscribing as part of a group create a comparison between their Aggregated Group Analysis (combined titles of all group members, with duplicates removed) and the selected collection development list.

The current list of collection development lists is available at:
< <http://www.oclc.org/support/documentation/collectionanalysis/authlists.html> >

	Action
1	Select a list from the Select an Authoritative List box.
2	Select the Add  button. Result: A confirmation window appears.
3	In the confirmation window, select OK . Result: The confirmation window closes.
4	Select Save Changes . Result: A confirmation message appears at the top of the screen and the group you selected appears in the Choose an Authoritative List Comparison to delete field. Warning: If you leave the screen before you select Save Changes the comparison will not be created.


Creating a Predefined Group Comparison (Administrative Module)

All subscribing libraries can create a comparison between their holdings and an OCLC-defined group.

- Libraries subscribing as individual institutions create a comparison between their holdings and an OCLC-defined group.
- Libraries subscribing as part of a group create a comparison between their Aggregated Group Analysis (combined titles of all group members, with duplicates removed) and an OCLC-defined group.

An OCLC-defined group is a set of libraries that have been selected for the significance and/or specialization of their collections. This type of comparison is called a *Predefined Group comparison*.

The current list of Predefined Groups is available at:
< <http://www.oclc.org/support/documentation/collectionanalysis/predefinedgroups.html> >

	Action
1	Select a category from the Select a Category list.
2	Select a subcategory from the Select a Subcategory list.
	In the Select a Predefined Group field, select the group with which you want to compare your library's holdings.
3	Select the Add  button. Result: A confirmation window appears.
4	In the confirmation window, select OK . Result: The confirmation window closes.
5	Select Save Changes . Result: A confirmation message appears at the top of the screen and the group you selected appears in the Choose a Predefined Group Comparison to delete field. Warning: If you leave the screen before you select Save Changes the comparison will not be created.

Creating an ILL Analysis (Administrative Module)

Libraries subscribing as individual institutions can view their borrowing and lending activity within WorldCat Resource Sharing. This type of comparison is called an *ILL Analysis*.

Borrowing

For borrowing, all submitted requests are counted, that is, every time a staff member selects the Submit button on any staff Workform or on the Direct Request Workform a borrowing request is counted. The outcome of the request is **not** relevant; if the request ultimately expires as unfilled it is still counted as a borrowing request.

Libraries can track their borrowing activity by:


- Request date
- Request frequency
- Request cost

Lending

All requested items that are physically or electronically shipped from a library are counted as lending requests. Items that are not in fact expected to be returned, such as photocopies of articles, as well as items that are expected to be returned, such as books, CDs, DVDs, are all counted as lending requests.

Libraries can track their lending activity by:

- Request date
- Request frequency

	Action
1	Select My Library as Borrower or My Library as Lender from the Select an ILL Analysis list.
2	Select the Add  button. Result: A confirmation window appears.
3	In the confirmation window, select OK . Result: The confirmation window closes.
4	Select Save Changes . Result: A confirmation message appears at the top of the screen and the group you selected appears in the Choose an ILL Analysis to delete field. Warning: If you leave the screen before you select Save Changes the comparison will not be created.

Support

OCLC support staff:

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Documentation

User Guide

The WorldCat Collection Analysis User Guide is available as an HTML document on the [OCLC Web site](http://www.oclc.org) at:

< <http://www.oclc.org/support/documentation/collectionanalysis/using/default.htm> >.

The navigation area (left column) of this page contains a link to a .pdf version of the document.

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