

# Navigating WMS Analytics for the Right Data

**Laura Edwards - Todd King - Kelly Smith**  
Eastern Kentucky University Libraries

OCLC Global Community + User Group Meeting 2017

[http://encompass.eku.edu/fs\\_research/191](http://encompass.eku.edu/fs_research/191)

# Keys to Success in WMS Analytics

## Understand your question (*The Why*)

- Why do you need it? (*AKA who is your audience*)
- Articulate what combination of metrics you need to answer the question

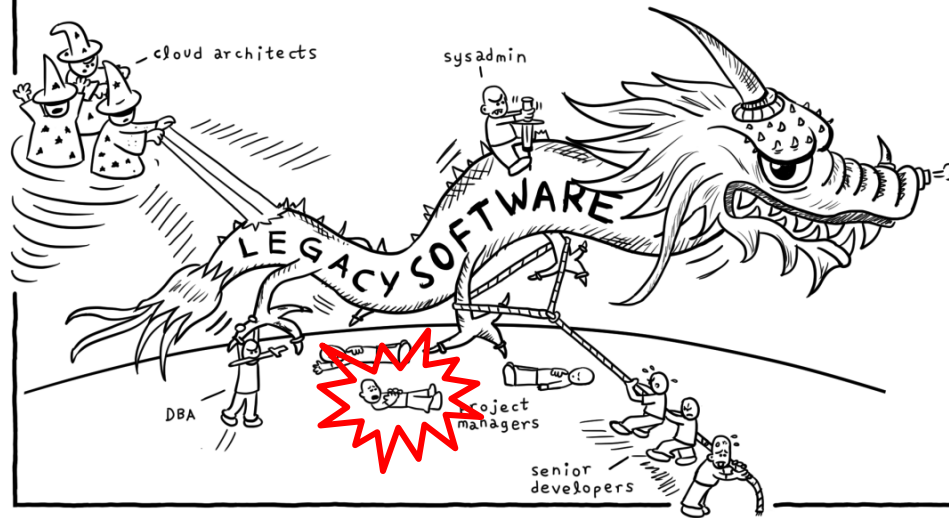
## Understand the data (*The What*)

- Where is it coming from?
- Who/what is inputting it?
- Does it mean what you think it means?

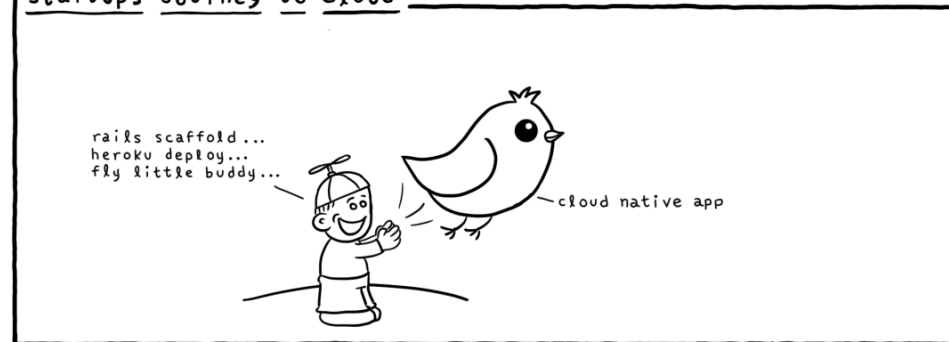


[encompass.eku.edu/fs\\_research/191](http://encompass.eku.edu/fs_research/191)

## The Enterprise Journey to Cloud



## Startups Journey to cloud



# Collection Evaluation

OCCLC Number	Format	Subject	Shared By	Title	Author	Publication Date	Edition	Publisher	ISSN	ISBN	LCCN	Language	Physical Description	Series Statement	Genre	Audience	Number of Circulations	Last Circulated Date
2	Book ,Prin	Superintendent of		Mudlumps at the n	Morgan, J.	1963		Louisiana State University Pres			6.3E+07	English	xvi, 190 pag	Louisiana State Univer	Adult		0	00:00.0
8	Book ,Prin	Political Inst. & P		State purchasing ir	Zettlemoy	1963		Legislative Research Commissi			6.4E+07	English	v, 33 pages	Research report (Kent)	Adult		0	00:00.0
9	Book ,Prin	Labor, General		Workmen's compe	Caswell, B	1963		Legislative Research Commissi			6.4E+07	English	v, 27 pages	Research report (Kent)	Adult		0	00:00.0
58	Book ,Prin	Economic History		An economic histo	Vicens Viv	1969					6.6E+07	English	viii, 825 pages :		Adult		0	00:00.0
61	Book ,Prin	Judaism		From fertility cult t	Harrelson	1969	[1st ed.]	Doubleday,			6.6E+07	English	xv, 171 pages ;		Adult		0	00:00.0
67	Book ,Prin	Commerce, Generi		Lives of American	Hunt, Free	1969	[1st ed.]	A.M. Kelley,			6.6E+07	English	2 volumes	Reprints of economic	Adult		0	00:00.0
72	Book ,Prin	History - Eastern		Fragile victory; Pri	Harada, K	1968		Wayne State University Press,			6.6E+07	English	330 pages		Adult		0	00:00.0
80	Book ,Prin	Visual Arts in Gen		African Negro art,	Museum c	1966	Reprint ed	Published for the Museum of M			6.6E+07	English	58 pages		Exhibition Adult		0	00:00.0
90	Book ,Prin	Anthropology, Ger		On the natural var	Blumenba	1969		Bergman Publishers		8.8E+08	6.6E+07	English	xiv, 406 pages	Classifica	Adult		0	00:00.0
93	Book ,Prin	Music Instruction		History of public s	Birge, Edw	1966		Music Educators National Conf			6.6E+07	English	296 pages :		Adult		0	00:00.0
158	Book ,Prin	Philosophy - Mod		The Philosophy of	C.I. Lewis /	1968	1st ed.	Open Court,		8.8E+08	6.7E+07	English	xiv, 709 pag	Library of living philo	Adult		0	00:00.0
162	Book ,Prin	Painting		A treasury of illum	Oi'sterrei	1967	1st Americ	Putnam			6.7E+07	English	264 pages	Catalogs.	Adult		1	12:06.8
164	Book ,Prin	American Literatu		Omoo : a narrative	Melville, F	1968		Northwestern Univer		8.1E+08	6.7E+07	English	xv, 380 pag	Melville, He Action an	Adult		0	00:00.0
168	Book ,Prin	Family, Marriage,		Sons of Adam, dau	Ross, Ishb	1969	[1st ed.]	Harper & Row			6.7E+07	English	viii, 340 pages	Biography	Adult		0	00:00.0
177	Book ,Prin	Latin Literature		The Saturnalia.	Macrobiu	1969		Columbia University		2.3E+08	6.7E+07	English	x, 560 page	Records of Poetry.	Adult		0	00:00.0
183	Book ,Prin	Communities, Cla		Structure and change	in India	1968		Aldine Pub. Co.			6.7E+07	English	xvi, 507 pag	Viking Fund publicatic	Adult		0	00:00.0
191	Book ,Prin	Doctrinal Theolog		Christian letters to	Sayers, Dc	1969		Eerdman's,			6.7E+07	English	xiii, 236 pages :		Adult		0	00:00.0
193	Book ,Prin	Transportation &		Historical account	Priestley,	1968	2d ed.	A.M. Kelley Publishers,			6.7E+07	English	xii, 776, x pi	Reprints of History.	Adult		0	00:00.0
197	Book ,Prin	Decorative Arts, A		Decorative antique	Musee Le	1968		Dover Publications		4.9E+08	6.7E+07	English	x, 415 page	Dover pictorial archiv	Adult		0	00:00.0
211	Book ,Prin	History - United St		The tragedy of Lync	Goldman,	1969	[First editi	Knopf,			6.7E+07	English	xii, 531, xxi pages ;	Biographi	Adult		0	00:00.0
229	Book ,Prin	English Literature		Ancient songs and	Ritson, Jos	1968	3d ed.	Singing Tree Press,			6.7E+07	English	xc, 436 pages	Texts.	Adult		0	00:00.0
232	Book ,Prin	Architecture		The architectural p	Egorov, li,	1969		Ohio University Press,			6.7E+07	English	xxix, 237 pages		Adult		0	00:00.0
233	Book ,Prin	Folklore		The book of noodle	Clouston,	1969		Gale Research Co.,			6.7E+07	English	228 pages		Adult		0	00:00.0
236	Book ,Prin	Finance, General		Foreign investment	Remer, C. I	1968		H. Fertig,			6.7E+07	English	xliv, 732 pages		Adult		0	00:00.0
238	Book ,Prin	French Literature		Anatole France.	Virtanen, I	1968		Twayne Publishers			6.7E+07	English	183 pages	Twayne's w	Criticism, Adult		0	00:00.0
239	Book ,Prin	Spanish Literature		Mateo Alemain.	McGrady,	1968		Twayne Publishers			6.7E+07	English	190 pages	Twayne's world author	Adult		0	00:00.0
240	Book ,Prin	German Literature		Walther von der V	Jones, Gec	1968		Twayne Publishers			6.7E+07	English	167 pages	Twayne's w	Criticism, Adult		0	00:00.0
241	Book ,Prin	History - United St		The making of blac	Meier, Aug	1969	[1st ed.]	Atheneum,			6.7E+07	English	xvi, 377, 50'	Studies in A History.	Adult		0	00:00.0
242	Book ,Prin	Hydraulic Enginee		Handbook of appli	Davis, Cal	1969	3d ed.	McGraw-Hill			6.7E+07	English	1 volume (various pagin	Handbook	Adult		0	00:00.0
253	Book ,Prin	History - United St		Change and Continuity	in Twe	1968					6.7E+07	English	ix, 456 page	Modern Am History.	Adult		1	31:05.4
259	Book ,Prin	Public Health		Smoking, health, and	behavio	1968		Aldine Pub. Co.			6.7E+07	English	xii, 288 pages		Adult		0	00:00.0
261	Book ,Prin	American Literatu		Prometheus bound	Lowell, Ro	1969		Farrar, Straus & Giroux			6.7E+07	English	vi, 67 pages		Drama. Adult		0	00:00.0
276	Book ,Prin	State & Local Hist		A catalogue of the	Hinman, R	1968		Genealogical Pub. Co.,			6.7E+07	English	336 pages :		Genealogy Adult		0	00:00.0
277	Book ,Prin	State & Local Hist		The Cherokee land	Smith, Jan	1969		Genealogical Pub. Co.,			6.7E+07	English	520 pages :		Genealogy Adult		0	00:00.0
283	Book ,Prin	Sociology, General		Interaction ritual;	Goffman, I	1967		Aldine Pub. Co.			6.7E+07	English	270 pages		Adult		0	00:00.0

0

Collection Evaluation

My Files

Reports

Reports

Report Launch Pad

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

32

33

34

35

36

37

38

39

40

41

42

43

44

45

46

47

48

49

50

51

52

53

54

55

56

57

58

59

60

61

62

63

64

65

66

67

68

69

70

71

72

73

74

75

76

77

78

79

80

81

82

83

84

85

86

87

88

89

90

91

92

93

94

95

96

97

98

99

100

101

102

103

104

105

106

107

108

109

110

111

112

113

114

115

116

117

118

119

120

121

122

123

124

125

126

127

128

129

130

131

132

133

134

135

136

137

138

139

140

141

142

143

144

145

146

147

148

149

150

151

152

153

154

155

156

157

158

159

160

161

162

163

164

165

166

167

168

169

170

171

172

173

174

175

176

177

178

179

180

181

182

183

184

185

186

187

188

189

190

191

192

193

194

195

196

197

198

199

200

201

202

203

204

205

206

207

208

209

210

211

212

213

214

215

216

217

218

219

220

221

222

223

224

225

226

227

228

229

230

231

232

233

234

235

236

237

238

239

240

241

242

243

244

245

246

247

248

249

250

251

252

253

254

255

256

257

258

259

260

261

262

263

264

265

266

267

268

269

270

271

272

273

274

275

276

277

278

279

280

281

282

283

284

285

286

287

288

289

290

291

292

293

294

295

296

297

298

299

300

301

302

303

304

305

306

307

308

309

310

311

312

313

314

315

316

317

318

319

320

321

322

323

324

325

326

327

328

329

330

331

332

333

334

335

336

337

338

339

340

341

342

343

344

345

346

347

348

349

350

351

352

353

354

355

356

357

358

359

360

361

362

363

364

365

366

367

368

369

370

371

372

373

374

375

376

377

378

379

380

381

382

383

384

385

386

387

388

389

390

391

392

393

394

395

396

397

398

399

400

401

402

403

404

405

406

407

408

409

410

411

412

413

414

415

416

417

418

419

420

421

422

423

424

425

426

427

428

429

430

431

432

433

434

435

436

437

438

439

440

441

442

443

444

445

446

447

448

449

450

451

452

453

454

455

456

457

458

459

460

461

462

463

464

465

466

467

468

469

470

471

472

473

474

475

476

477

478

479

480

481

482

483

484

485

486

487

488

489

490

491

492

493

494

495

496

497

498

499

500

501

502

503

504

505

506

507

508

509

510

511

512

513

514

515

516

517

518

519

520

521

522

523

524

525

526

527

528

529

530

531

532

533

534

535

536

537

538

539

540

541

542

543

544

545

546

547

548

549

550

551

552

553

554

555

556

557

558

559

560

561

562

563

564

565

566

567

568

569

570

571

572

573

574

575

576

577

578

579

580

581

582

583

584

585

586

587

588

589

590

591

592

593

594

595

596

597

598

599

600

601

602

603

604

605

606

607

608

609

610

611

612

613

614

615

616

617

618

619

620

621

622

623

624

625

626

627

628

629

630

631

632

633

634

635

636

637

638

639

640

641

642

643

644

645

646

647

648

649

650

651

652

653

654

655

656

657

658

659

660

661

662

663

664

665

666

667

668

669

670

671

672

673

674

675

676

677

678

679

680

681

682

683

684

685

686

687

688

689

690

691

692

693

694

695

696

697

698

699

700

701

702

703

704

705

706

707

708

709

710

711

712

713

714

715

716

717

718

719

720

721

722

723

724

725

726

727

728

729

730

731

732

733

734

735

736

737

738

739

740

741

742

743

744

745

746

747

748

749

750

751

752

753

754

755

756

757

758

759

760

761

762

763

764

765

766

767

768

769

770

771

772

773

774

775

776

777

778

779

780

781

782

783

784

785

786

787

788

789

790

791

792

793

794

795

796

797

798

799

800

801

802

803

804

805

806

807

808

809

810

811

812

813

814

815

816

817

818

819

820

821

822

823

824

825

826

827

828

829

830

831

832

833

834

835

836

837

838

839

840

841

842

843

844

845

846

847

848

849

850

851

852

853

854

855

856

857

858

859

860

861

862

863

864

865

866

867

868

869

870

871

872

873

874

875

876

877

878

879

880

881

882

883

884

885

886

887

888

889

890

891

892

893

894

895

896

897

898

<

0
Metadata
Acqu

Collection Evaluation

My Files

Reports

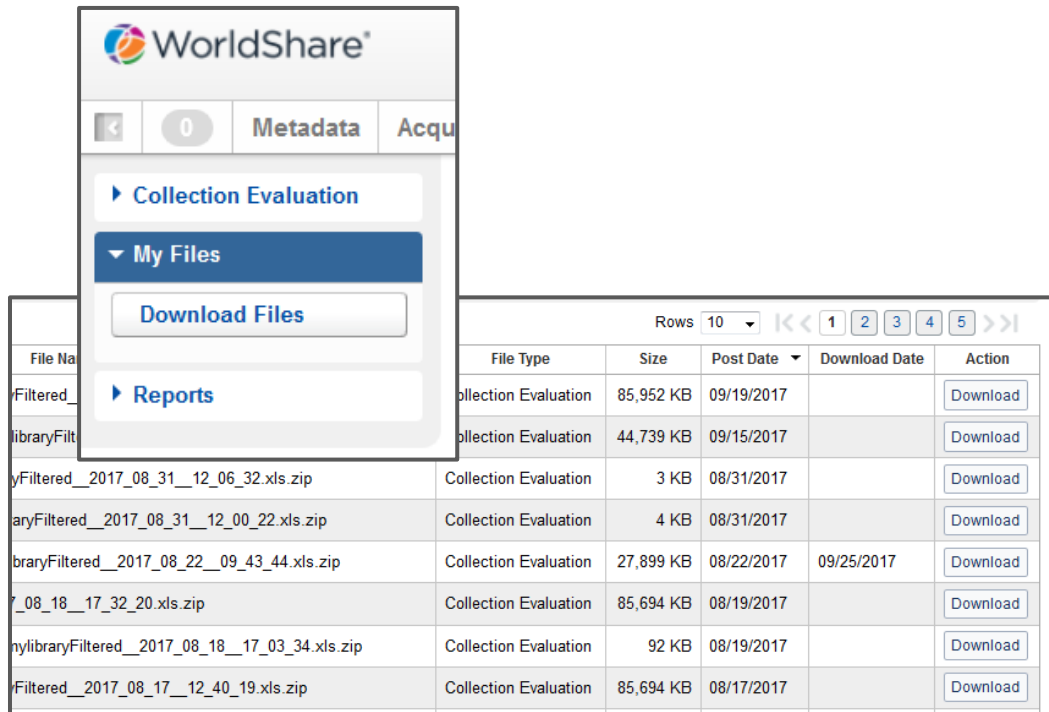
Reports

Report Launch Pad

# Collection Evaluation

- Collection Evaluation reports count the number of titles
- Titles activated via Collection Manager module are **included** in Collection Evaluation reports

*\*Caveat:* Formats and Subjects are not entirely reliable



The screenshot shows the WorldShare interface. A sidebar menu on the left contains the following items: "Collection Evaluation", "My Files" (with a "Download Files" button), and "Reports". The main content area displays a table of Collection Evaluation reports. The table has columns for File Name, File Type, Size, Post Date, Download Date, and Action. The first two rows are filtered views, and the subsequent rows are individual report files with ".xls.zip" extensions. Each row includes a "Download" button in the Action column.

File Name	File Type	Size	Post Date	Download Date	Action
Filtered	Collection Evaluation	85,952 KB	09/19/2017		<a href="#">Download</a>
Library Filtered	Collection Evaluation	44,739 KB	09/15/2017		<a href="#">Download</a>
Library Filtered__2017_08_31__12_06_32.xls.zip	Collection Evaluation	3 KB	08/31/2017		<a href="#">Download</a>
Library Filtered__2017_08_31__12_00_22.xls.zip	Collection Evaluation	4 KB	08/31/2017		<a href="#">Download</a>
Library Filtered__2017_08_22__09_43_44.xls.zip	Collection Evaluation	27,899 KB	08/22/2017	09/25/2017	<a href="#">Download</a>
Library Filtered__2017_08_18__17_32_20.xls.zip	Collection Evaluation	85,694 KB	08/19/2017		<a href="#">Download</a>
Library Filtered__2017_08_18__17_03_34.xls.zip	Collection Evaluation	92 KB	08/19/2017		<a href="#">Download</a>
Library Filtered__2017_08_17__12_40_19.xls.zip	Collection Evaluation	85,694 KB	08/17/2017		<a href="#">Download</a>

# Collection Evaluation: what you can do

## Review Shelving Locations in use

Collection Evaluation tool only displays shelving locations in use

Check here to see if the shelving location you need to remove is still in use

Select Location(s)

- ☐ KEUC Contact Library Staff
- ☐ KEUC Grand Reading Room - Coffee Table
- ☐ KEUC Grand Reading Room - Display
- ☐ KEUC Grand Reading Room - New Books
- ☐ KEUC Grand Reading Room - Popular Collection
- ☒ KEUC Grand Reading Room - Staff Picks
- ☐ KEUC Grand Reading Room - Writing Collection
- ☐ KEUC Help Desk - 1 Day Reserves
- ☐ KEUC Help Desk - 2 Day Reserves

Shelving location that we are no longer using

OK

Export Summary Table Export Title List

miscellaneous	594
	6590
	81
	60
	72
	054
itory	1992
health	7359
	94492
ture	124673
	11327
Reference	79464
	4348
	13283
	4045

# Collection Evaluation: what you can do

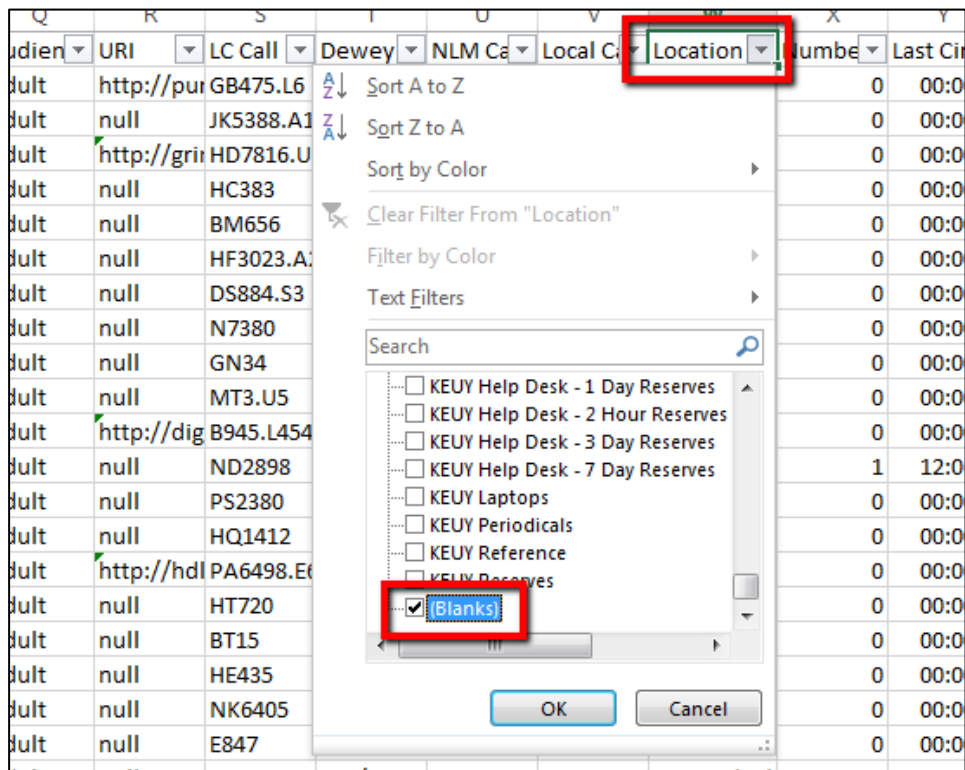
## Review Titles with no Locations

- Filter by Location = "(Blanks)"

### *Caveats:*

Will include titles activated via Collection Manager module

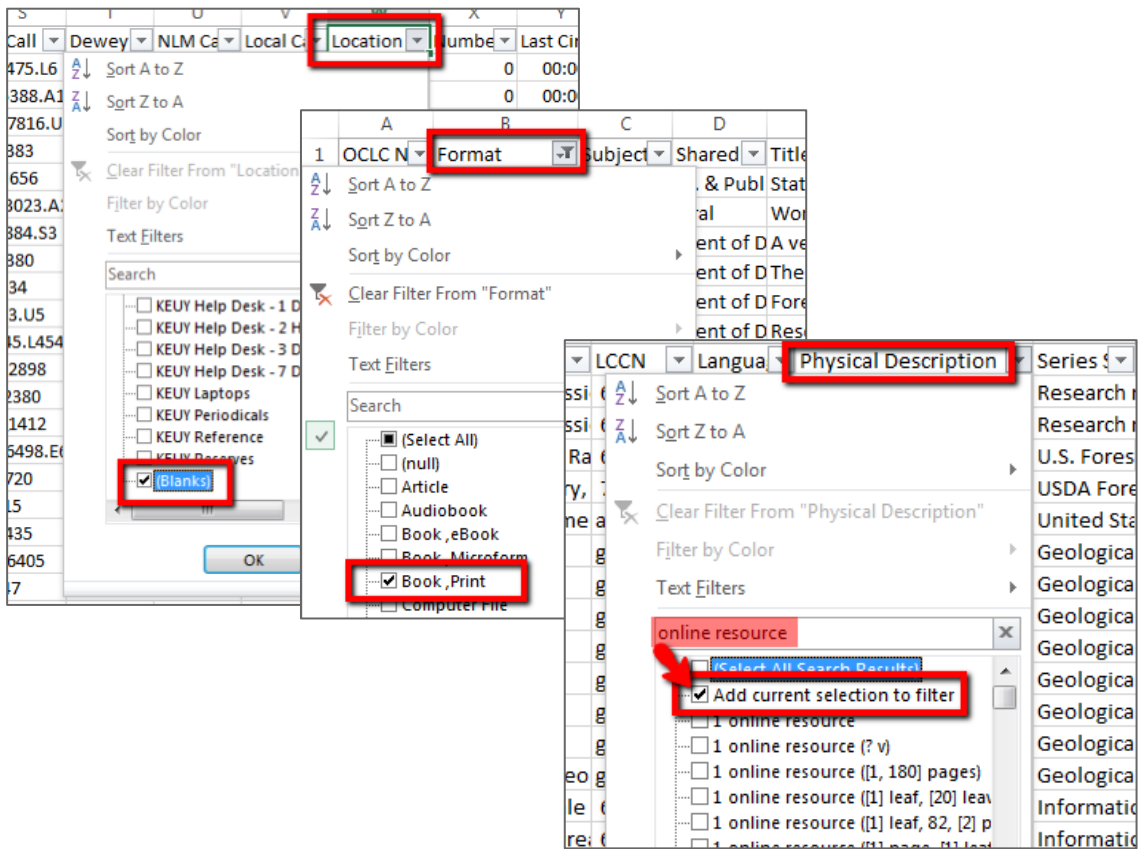
Will include titles that are part of bound-with containers that have not yet been fixed



# Collection Evaluation: what you can do

## Review Print Books without a Location

- Filter by Location = “(Blanks)”
- Filter by Format = “Book, Print”
- Filter by Physical Description = exclude anything with “online resource”
  - Will help exclude *most* online titles





## Accreditation reports\*

- Filter by Format = Books: eBooks
- Drill down via subject

*\*Caveat: Formats and Subjects are not entirely reliable*

My Library

Total holdings: 904,719

Last Updated: Aug 27, 2017

Display By

Publication Date

Limits

☐ Publication Date  
☐ Latest Circulation Date  
☐ Circulated # times in lifetime  
☒ Format

Books: eBooks

Add Format

☐ Language  
☐ Location

Apply

Clear

Subject	Totals	1500-1599	1600-1699	1700-1799	1800-1849	1850-1899	1900-1999
<b>&gt;&gt; Business &amp; Economics Totals</b>	18133	0	0	92	159	0	0
<a href="#">Business, Business Administration</a>	2518			1	1		
<a href="#">Commerce, General</a>	760			0	1		
<a href="#">Economic History &amp; Conditions</a>	2529			0	1		
<a href="#">Economic Theory</a>	1644			85	149		
<a href="#">Economics - Industries, Land Use, Labor</a>	3537			0	2		
<a href="#">Economics - Industry, General</a>	718			0	0		
<a href="#">Finance, General</a>	1861			1	2		
<a href="#">Labor, General</a>	1893			1	1		
<a href="#">Public Finance, General</a>	330			4	2		
<a href="#">Socialism, Communism, Utopias, Anarchism</a>	409			0	0		
<a href="#">Special Industries &amp; Trades, General</a>	1077			0	0		
<a href="#">Statistics</a>	190			0	0		
<a href="#">Transportation &amp; Communication, General</a>	654			0	0		
<a href="#">Writing</a>	13			0	0		

# Collection Evaluation: what you can do

ADMIN POV

## Quick and dirty on the fly holdings snapshots

**My Library**

Total holdings: 906,782  
Last Updated: Sep 17, 2017

Display By **Format** [Conspectus map](#)

Limits	Subject	Totals	Archival Materials	Articles	Audiobooks	Books	Computer Files	Games (A
<input type="checkbox"/> Publication Date	<a href="#">Agriculture</a>	6310	0	2	0	5822	0	0
<input type="checkbox"/> Latest Circulation Date	<a href="#">Anthropology</a>	5858	0	0	0	4824	0	1
<input type="checkbox"/> Circulated # times in lifetime	<a href="#">Art &amp; Architecture</a>	20937	0	3	1	20171	1	0
<input type="checkbox"/> Format	<a href="#">Biological Sciences</a>	8658	0	2	9	7799	1	1
<input type="checkbox"/> Language	<a href="#">Business &amp; Economics</a>	51416	1	1	5	47694	3	1
<input type="checkbox"/> Location	<a href="#">Chemistry</a>	2312	0	0	0	2129	0	0
	<a href="#">Communicable Diseases &amp; Miscellaneous</a>	601	0	0	0	593	0	0

**Export Summary Table** **Export Title List**

Totals	906,782
Books	706,024
Music	75,893
Videos	69,933
Journals/Magazines	36,645
Musical Score	9,042
Maps	4,332
Newspapers	1,655
Internet Resources	959
Audiobooks	447
Images	298
Objects	295
Computer Files	289
Kits	171
Articles	168
Toys	163
Archival Materials	161
Games (All)	126
Interactive Multimedia	123
Visual Materials	58

# Inventory Report (FTP)

**Collection Evaluation** = everything with library holdings symbol applied

- **Title** count (ACRL/IPEDS wants this)
- Includes online materials
- Periodical counted once

**Inventory** = everything with a barcode

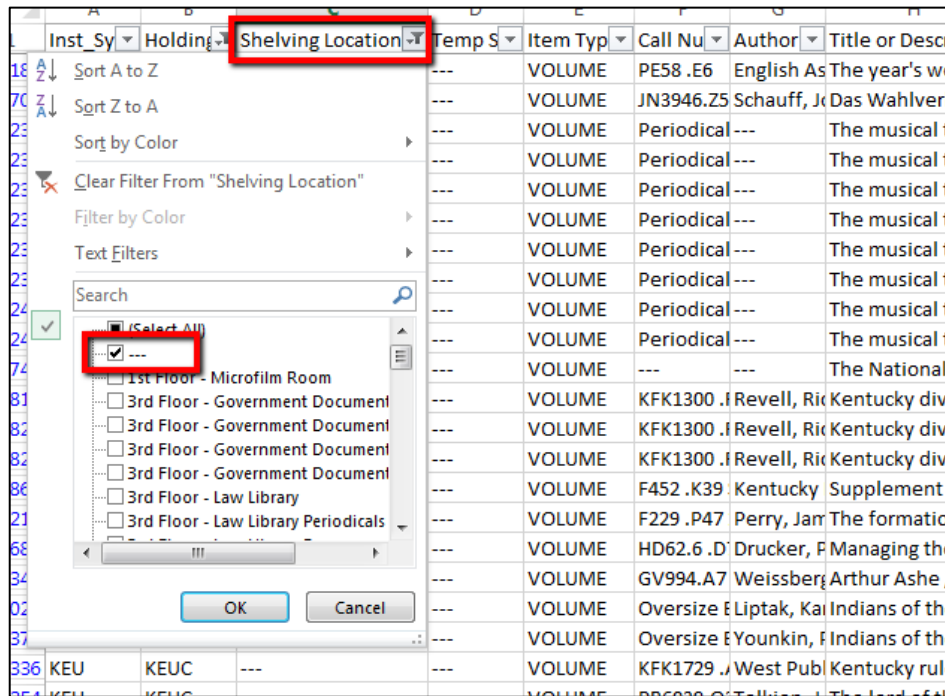
- **Volume** count
- Includes each bound volume of a periodical

Inventory (FTP) fields	Collection Evaluation fields
Inst_Symbol	
Holding Location	
Shelving Location	Location
Temp Shelving Location	
Item Type	
Call Number	Local Call Number
Author	Author
Title or Description	Title
Textual Holdings	
Material Format	Format
OCLC Number	OCLC Number
ISBN	ISBN
Item Barcode	
Cost	
Staff Note	
Public Note	
Current Status	
Loan Date Due	
Issued Count	<i>Number of Circulations</i>
Issued Count YTD	
Last Issued Date	<i>Last Circulated Date</i>
Last Inventoried Date	
Item Deleted Date	
	Subject
	Shared By
	Publication Date
	Edition
	Publisher
	ISSN
	LCCN
	Language
	Physical Description
	Series Statement
	Genre
	Audience
	URI
	LC Call Number
	Dewey Call Number
	NLM Call Number

# Inventory - what you can do

## Review Shelving Locations

- Review items missing a shelving location  
(filter by “Shelving Location” = ---)
- Pull list of titles and their barcodes to bulk update the shelving location
  - Putting items on display
  - Moving items to a different location



# Inventory - what you can do

## Clean up missing call numbers

- Filter by “Item Type” = VOLUME
- Then filter by “Call Number” = ---

D	E	F	G	H	I	J	K	L	M
mp S	Item Type	Call Number	Author	Title or Descript	Textual	Material	OCLC N	ISBN	Item Barcode
	VOLUME	---	Aldrich, T	Ponkapog papers.	---	Book	13839	978083691	3123400053
	VOLUME	---	Holt, Vict	The shivering sand	---	Book	22537		3123401029
	VOLUME	---	Henzke, L	American art potte	---	Book	103965	978084074	3123400071
	VOLUME	---	Seyppel, J	William Faulkner	---	Book	148584	080446859	3123401040
	VOLUME	---	Piper, Her	F. Scott Fitzgerald,	---	Book	167506		3123401027
	VOLUME	---	Miller, Ger	Leah in his house	---	Book	169593		3123401041


Call Number	Barcode	Shared Print	Branch	Shelving Location
<input type="checkbox"/>	<input type="text" value="31234000539021"/>		KEUC	4th Floor - Books


VOLUME	---	Grierson, Metaphysical lyrics	---	Book	351878		3123400129
VOLUME	---	Brandt, W	The ordeal of coex	---	Book	372231	3123401007
VOLUME	---	Vidal, Gor	Myra Breckinridge.	---	Book	438548	3123401040
VOLUME	---	Myers, L. I	The roots of model	---	Book	612850	3123401024
VOLUME	---						3123400137
VOLUME	---						3123400181
VOLUME	---						3123401021
VOLUME	---						3123400223
VOLUME	---						3123400253
VOLUME	---						3123400262

1. [Ponkapog papers.](#)

by [Thomas Bailey Aldrich](#)

 Print book [1969]

Held by: [EKU Libraries](#)

 Available Main Library 4th Floor - Books

[View all editions & formats](#)

# Inventory - what you can do

## Clean up temporary items

- Filter by Item Type = CIRC\_MANAGED

E	F	G	H	I	J	K	L	M
Item Type	Call Nu	Author	Title or Description	Textual	Material	OCLC N	ISBN	Item Barcode
CIRC_MANAGED	---	---	FH 604 Tipton	---	Archv			fh-604
CIRC_MANAGED	---	---	Large Larynx	---	Object			31234011693882
CIRC_MANAGED	---	---	Waste Family Letters, folder 2	---	Archv			2003-051-f002
CIRC_MANAGED	---	---	RR VF Richmond Fire Company	---	Archv			rr-vf-richmondfire
CIRC_MANAGED	---	Richard Iz	On Practising, c.3	---	ArtChap			31234012001754
CIRC_MANAGED	---	---	William J. Moore Papers, Box 1	---	Archv			1983-013-b001
CIRC_MANAGED	---	---	Nephron	---	Object			31234011694246
CIRC_MANAGED	---	---	Wireless Keyboard	---	otr			31234011697743
CIRC_MANAGED	---	Elmer Wh	Tested Sentences That Sell	---	Book			31234008956073
CIRC_MANAGED	---	---	Central University Records, Box 2	---	Archv			1979-048-b002
CIRC_MANAGED	---	---	Chenault Family Papers	---	Archv			1999-017
CIRC_MANAGED	---	---	Vietnam War Collection, f.1	---	Archv			0010-022-f001
CIRC_MANAGED	---	William B	Elia Kazan: Interviews	---	Book			31234113564412
CIRC_MANAGED	---	---	Human Resources, Box 2	---	Archv			1992-025-b002
CIRC_MANAGED	---	---	EKU Photographs, Box 3	---	Archv			0001-005-b003
CIRC_MANAGED	---	Colin Gorc	Major Problems in American Histo	---	Book			31234013584881
CIRC_MANAGED	---	---	Calculator 06	---	otr			31234011730619
CIRC_MANAGED	---	---	President's Office Records - Marti	---	Archv			1976a001-b345

*\*Caveat:* Pay attention to item details - some temporary items are legitimate

# Inventory - what you can do

Perl script to sort Inventory -  
available on Community Center

[tinyurl.com/wmsinventoryperl](http://tinyurl.com/wmsinventoryperl)

Separates call number into parts  
for better sorting in Excel

D	E	F	G
Class	Numpart	Cutter	Descr
D	105.2	:K 41z/20	---
D	105.2	:K 41z/18 App.D Drawings	---
D	105.2	:K 41z/17	---
D	105.2	:K 41 z/19	---
D	105.2	:K 41z/21	---
I	19.3	:NO.1395 A-J	---
HC	383	.V513	---
BM	656	.H3	---
HF	3023	A2 H8 1969	v.1
HF	3023	A2 H8 1969	v.2
DS	884	S3 H333 1968	---

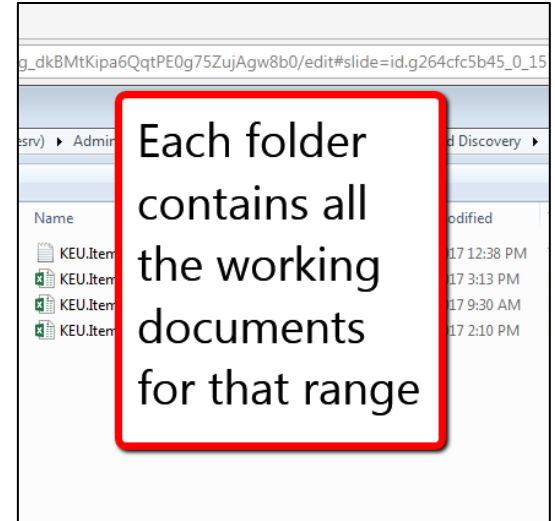
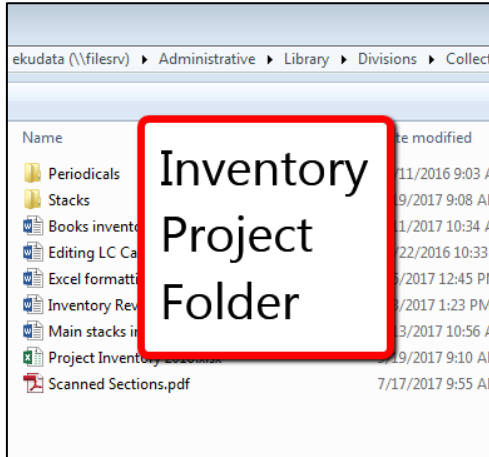
# Inventory Workflow & Process at ECU

1. Scanners notify metadata associate of call number range scanned in previous week
2. Metadata Associate pulls inventory report **weekly**
3. Metadata Associate sorts and filters in succession, looks for:
  - titles scanned, but from another shelving location
  - titles scanned, but out of order
  - titles scanned, but with item status WITHDRAWN or ON\_LOAN
  - titles not scanned
4. Report is smaller and smaller based on progression of checks
5. Eventually narrowed to call number range inventoried as of a certain time period
6. Problems noted, cleaned up and/or referred to other staff

Last Invenoried Date		
6/20/2016 13:08	-	
6/20/2016 13:06	-	
6/20/2016 13:11	-	
6/20/2016 13:08	-	
6/20/2016 13:09	-	
6/20/2016 13:06	-	
6/20/2016 13:08	-	
6/20/2016 13:08	-	
6/20/2016 13:09	-	
6/20/2016 13:08	-	



# Inventory Workflow & Process at ECU



# Report Designer

WorldShare®

Welcome: **Kelly Smith** | Applications ▾ Preferences Help menu ▾

Home Documents

View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ Details

My Documents

Folders

- Public Folders
  - Acquisitions Reports
  - Cataloging/Collection Reports
  - Circulation Reports
  - E-Resources Reports
  - KEU

Title ▲	Last Run	Instances	Description
Education Titles not in LB		0	
LRC Items on Loan Through ILL		0	
TKWMS - Archives Circulation Statistics		0	Circulation statistics by branch and month
TKWMS - Archives Currently Checked Out Items		0	Detailed list of items currently checked out
TKWMS - Archives Title List with Stats		0	
TKWMS - Branch Item Holdings by Material and Submaterial Format		0	This report shows Item Holdings quantity
TKWMS - Circ Fiscal Detail Report sorted by Staff and Action Type		0	Detailed circ billing events within a specified
TKWMS - Circulation Events Detail Report - with Staff Name		0	Circulation event details within a specified
TKWMS - Daily Payments Report with Patron Barcode		0	Daily payments by branch and payment m
TKWMS - Item Displays - Temporary Locations		0	
TKWMS - Lost Or Missing Items Report		0	Lost or Missing Items by Branch.
TKWMS - Overdue Items Aging Report - with Patron Contact		0	Circ report of Long Overdue items with patron contact information
TKWMS - Payment Activity by Location		0	Summary of payment activity by branch and shelving location within a specified period of time.
TKWMS - Payment Activity by Location with Invoice Paid Date		0	Summary of payment activity by branch and shelving location within a specified period of time.
TKWMS - Payment Activity by Location with Invoice Paid Date and Shipping Service Charges			
TKWMS - Reserve Stats			
TKWMS - Title Holdings by Material Format and Subformat			
TKWMS - Trends Report - Hourly Average Circulation Activity			

Search

WorldShare®

0 Metadata Acquisi

Collection Evaluation

My Files

Reports

Reports

Report Launch Pad

TKWMS - Payment Activity by Location with Invoice Paid Date and Shipping Service Charges

Description:  
Summary of payment activity by branch and shelving location within a specified period of time.

Type: Web Intelligence

# Inventory (FTP) vs. Report Designer

To get Inventory-like report, had to create a multi-universe report using "Circulation Item Status" and "LHR Item Detail"

Matching fields are listed here —▶

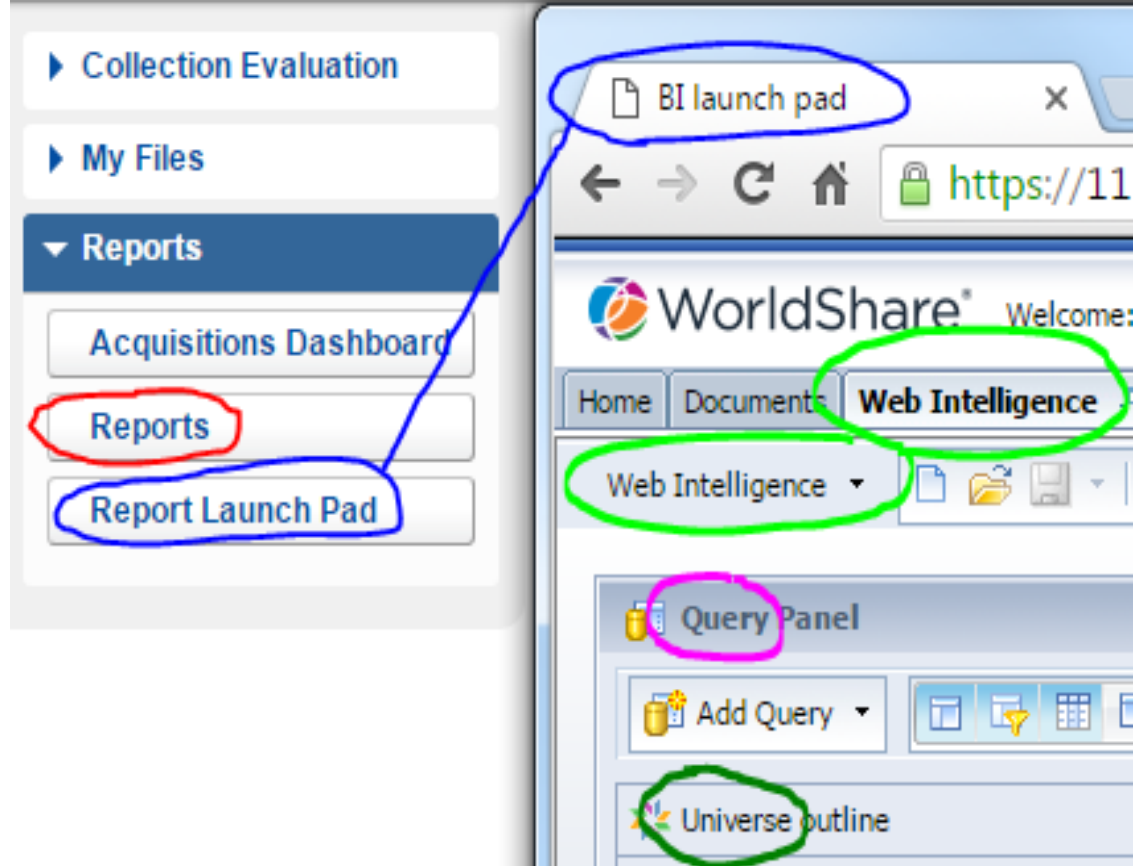
Note: where there are blanks there are no matching fields

For multi-universe report: had to get certain pieces from certain universes  
E.g. "Notes" from LHR

Inventory (FTP)	Circulation Item Status Universe	LHR Item Detail Universe
Inst_Symbol	Item Owning Institution Symbol	
Holding Location	Item Holding Location	LHR Item Holding Location
Shelving Location	Item Permanent Shelving Location	LHR Permanent Shelving Location
Temp Shelving Location	Item Temporary Shelving Location	LHR Temporary Shelving Location
Item Type	Item Type	
Call Number	Item Call Number	LHR Item Call Number
Author		Author Name
Title or Description	Item Title (no Description)	Title
Textual Holdings		(Not "LHR Item Textual Holdings")
Material Format	Item Material Format	Material Format (Book is BOOKS here)
OCLC Number	Item OCLC Number	OCLC Number
ISBN		Title ISBN (one only, last?)
Item Barcode	Item Barcode	LHR Item Barcode
Cost		LHR Item Cost
Staff Note		LHR Item Nonpublic Note (not "Copy" note)
Public Note		LHR Item Public Note
Current Status	Item Status Current Status	
Loan Date Due	Item Due Date	
Issued Count	Item Issued Count	
Issued Count YTD	Item Issued Count YTD	
Last Issued Date	Item Last Issued Date	
Last Inventoried Date	Item Last Inventoried Date	
Item Deleted Date	Item Deleted Date	
		Publication Date

# Report Designer - Training Session Topics

Terminology first



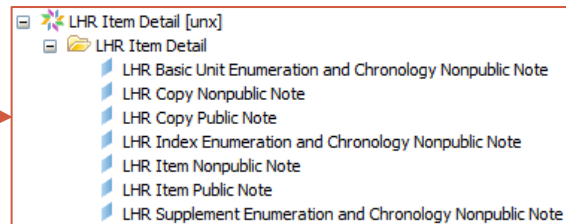
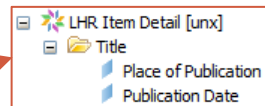
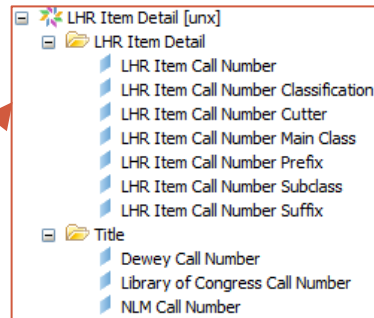
# Report Designer - Names of the things

- ▶ **Analytics:** the name of the module in WMS
- ▶ **Reports:** that thing with results
- ▶ **Report Launch Pad:** starts Web/Business Intelligence
- ▶ **Report Designer:** interface used to create reports
- ▶ **Web/Business Intelligence:** to view/create reports
- ▶ **Universe:** maps data to the database (Acq, Cat, Crc, etc)
- ▶ **Query:** fields & conditions you set for the report

# Report Designer: what you can do

## Title Shelf List

- Use new “LHR Item Detail” Universe
  - It has great Call # data
  - Publication info
  - Notes!
- But no “Measures” or status or stats



Don't forget the  
“Item  
Inventories”  
reports on FTP –  
it has a lot of  
shelf material +  
stats! (but no  
publication info)

# Report Designer: what you can do

## Numbers/Counts/Stats

(w/ or w/out Titles)

“What’s happened over time?”

“Circulation Events”  
Universe

- Billings Created
- Billings Paid
- Billings Waived
- Due Dates Changed
- Event Count
- Event Fiscal Amount Paid
- Holds Cancelled
- Holds Expired
- Holds Fulfilled
- Holds Picked Up
- Holds Placed
- Item Renewal Count
- Items Checked In
- Items Checked Out
- Items Dispatched
- Items Edited
- Items Found
- Items Recalled
- Items Received
- Items Renewed
- Items Routed
- Items Soft Checked Out
- Items Withdrawn

## Title List

(w/ or w/out Stats)

“What’s the status at this time?”

“Circulation Item Status”  
Universe

- Count Items
- Item Days In Transit
- Item Days Overdue
- Item Inventoried Count
- Item Issued Count
- Item Issued Count YTD
- Item Soft Issued Count
- Item Soft Issued Count YTD
- Loan Notification Count
- Loan Renewal Count

Neither of these  
Universes have  
“Author” or  
“Publisher” fields

# Report Designer: what you can do

More accurate checkout data than Circ module

Checkouts

VS.

Issued Count

(not the same)

[The hobbit, or, There and back again \(45094823\)](#)  
Item Details

Status: Available

Last Seen: 09/12/2016 7:52:20 PM at Learning Resources Center

Issued Count: 42

Issued Count YTD: 2

Soft Issued Count: 0

Soft Issued Count YTD: 0

Inventoried Count: 0

Last Inventoried: 06/06/2016 4:07:05 PM

Last Issued: 08/11/2016 3:22:13 PM at Main Library

[The hobbit, or, There and back again \(45094823\)](#)  
Item Details

Status: Available

Last Seen: 08/11/2016 3:22:13 PM at Main Library

Issued Count: 4

Issued Count YTD: 4

Soft Issued Count: 0

Soft Issued Count YTD: 0

Inventoried Count: 0

Last Inventoried: 06/06/2016 4:07:05 PM

Last Issued: 08/11/2016 3:22:13 PM at Main Library

Item Title Item Branch Name **Items Checked Out**

Query Filters

Item OCLC Number In List 45094823

Data Preview

Item Title	Item Branch Name	Items Checked Out
The hobbit, or, There and ba...	Learning Resources Center	3
The hobbit, or, There and ba...	Main Library	2



# Report Designer: what you can do

More accurate checkout data than Circ module

## Issued Count (Circ)

Checkouts

+ Renewals

+ Any previous stats from  
implementation

= Issued Count

## Checkouts (Report Designer)

Checkouts

= Checkouts only

# Report Designer: what you can do

More accurate checkout data than Circ module

Item Title

Item Branch Name

Event Type

Event Count

Query Filters

Item OCLC Number In List 45094823

Data Preview

Item Title	Item Branch Name	Event Type	Event Count
The hobbit, or, There and ba...	Learning Resources Center	Cancel-Bill	1
The hobbit, or, There and ba...	Learning Resources Center	Change-Due-Date	1
The hobbit, or, There and ba...	Learning Resources Center	Check-In	4
The hobbit, or, There and ba...	Main Library	Check-In	2
The hobbit, or, There and ba...	Learning Resources Center	Check-Out	3
The hobbit, or, There and ba...	Main Library	Check-Out	2
The hobbit, or, There and ba...	Learning Resources Center	Create-Bill	2
The hobbit, or, There and ba...	Learning Resources Center	Dispatch-Item	1
The hobbit, or, There and ba...	Learning Resources Center	Receive-Item	3
The hobbit, or, There and ba...	Learning Resources Center	Renew	3
The hobbit, or, There and ba...	Main Library	Renew	2
The hobbit, or, There and ba...	Learning Resources Center	Route-Item	3

[The hobbit, or, There and back again \(45094823\)](#)  
Item Details

Status:

Available

Last Seen:

08/11/2016 3:22:13 PM at Main Library

Issued Count:

4

Issued Count YTD:

4

Soft Issued Count:

0

Soft Issued Count YTD:

0

Inventoried Count:

0

Last Inventoried:

Last Issued:

06/06/2016 4:07:05 PM

# Report Designer: what you can do

More accurate checkout data than Circ module

The screenshot shows the Report Designer interface. At the top, there are five fields: 'Item Title', 'Item Branch Name', 'Item Issued Count', 'Item Issued Count YTD', and 'Item Last Issued Date'. Below these is a 'Query Filters' section with a dropdown for 'Item OCLC Number' set to 'In List' and the value '45094823'. At the bottom is a 'Data Preview' table with two rows of data. Red arrows point from the 'Item Issued Count' and 'Item Issued Count YTD' fields in the top section to the corresponding columns in the 'Data Preview' table. Another red arrow points from the 'Item Last Issued Date' field to the 'Item Last Issued Date' column in the table.

Item Title	Item Branch Name	Item Issued Count	Item Issued Count YTD	Item Last Issued Date
The hobbit, or, There and ba...	Learning Resources Center	42	2	2016/05/27 14:53:25
The hobbit, or, There and ba...	Main Library	4	4	2016/06/06 16:07:05

The screenshot shows the 'Item Details' page for item 'The hobbit, or, There and back again (45094823)'. It displays various status and count information. Red boxes highlight the 'Issued Count: 42', 'Issued Count YTD: 2', and 'Last Issued: 05/27/2016 2:53:25 PM' fields. Red arrows point from these fields to the corresponding fields in the Report Designer interface.

[The hobbit, or, There and back again \(45094823\)](#)  
Item Details

Status: Available

Last Seen: 09/12/2016 7:52:20 PM at Learning Resources Center

Issued Count: 42

Issued Count YTD: 2

Soft Issued Count: 0

Soft Issued Count YTD: 0

Inventoried Count: 0

Last Inventoried:

Last Issued: 05/27/2016 2:53:25 PM

The screenshot shows the 'Circulation Item Status [unx]' sidebar. It contains a list of measures and dates. The 'Item Issued Count YTD' measure is highlighted with a red box. The 'Item Last Issued Date' date is also highlighted with a red box. Red arrows point from these items to the corresponding fields in the Report Designer interface.

Circulation Item Status [unx]

- Measures
  - Count Items
  - Item Days In Transit
  - Item Days Overdue
  - Item Inventoried Count
  - Item Issued Count
  - Item Issued Count YTD
  - Item Soft Issued Count
  - Item Soft Issued Count YTD
  - Loan Notification Count
  - Loan Renewal Count
- Dates / Time
  - Item Available Processed Date
  - Item Declared Absent Date
  - Item Deleted Date
  - Item Due Date
  - Item Last Inventoried Date
  - Item Last Issued Date
    - Item Last Issued Date
    - Item Last issued Day
    - Item Last Issued Day Name

# Report Designer: what you can do

## Weird Year?

If **Last Issued Year** is “0001” item, then the item hasn’t circulated in date range

Item Title	Item Call Number	Item Issued Count	Item Last issued
2001 a space odyssey /	Video V8030	4	2005
30 frames a second the WTO in Seattle /	Video V8130	2	2005
A Baby is born	Video V5041	2	2012
ABC funfit	Video V4535	2	2008
Abnormal behavior a mental hospital /	Video V5439	3	2012
Abortion personal portraits /	HQ767 .A18 1988x	12	2013
Abortion personal portraits /	HQ767 .A18 1988x	12	2015
About self-esteem	Video V5324	1	2005
Accountability	TH9111 .A4 2002 Apr.	0	0001
A century of women.	Video V6931	0	0001

# Report Designer: what you can do

## Identify non inventoried items

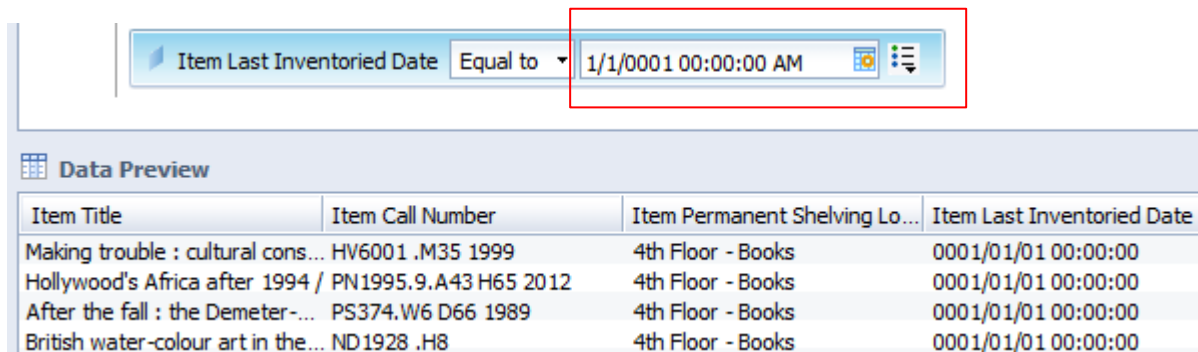
Use “Circulation Item Status” universe

Use “Item Last Inventoried Date” in  
Query Filter and make equal to:

**1/1/0001 00:00:00 AM**

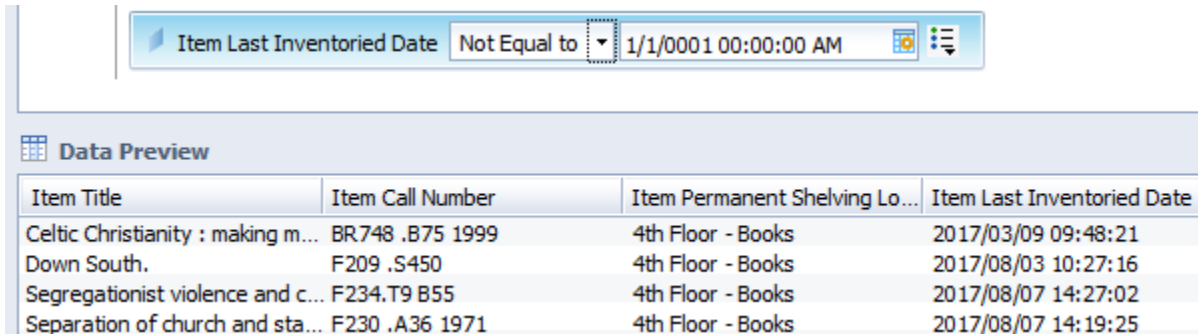
in criteria (shows different in report)

Make it “Not Equal to” to eliminate  
items not inventoried



Item Last Inventoried Date Equal to 1/1/0001 00:00:00 AM

Item Title	Item Call Number	Item Permanent Shelving Lo...	Item Last Inventoried Date
Making trouble : cultural cons...	HV6001 .M35 1999	4th Floor - Books	0001/01/01 00:00:00
Hollywood's Africa after 1994 /	PN1995.9.A43 H65 2012	4th Floor - Books	0001/01/01 00:00:00
After the fall : the Demeter-...	PS374.W6 D66 1989	4th Floor - Books	0001/01/01 00:00:00
British water-colour art in the...	ND1928 .H8	4th Floor - Books	0001/01/01 00:00:00



Item Last Inventoried Date Not Equal to 1/1/0001 00:00:00 AM

Item Title	Item Call Number	Item Permanent Shelving Lo...	Item Last Inventoried Date
Celtic Christianity : making m...	BR748 .B75 1999	4th Floor - Books	2017/03/09 09:48:21
Down South.	F209 .S450	4th Floor - Books	2017/08/03 10:27:16
Segregationist violence and c...	F234.T9 B55	4th Floor - Books	2017/08/07 14:27:02
Separation of church and sta...	F230 .A36 1971	4th Floor - Books	2017/08/07 14:19:25

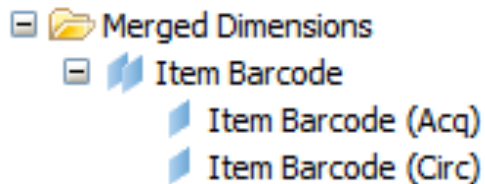
# Report Designer: what you can do

## Circ Stats + Purchase

Items purchased within past 2 years  
that have circulated 3 or more times

Must be a “cross-universe” report with  
Acquisitions + Circulation Events  
universes

These queries match on Item Barcode



The screenshot shows the "Result Objects" section with five items: "OCLC Number", "Title", "Expended Amount" (marked with a yellow "MM" icon), and "Received Date". Below this, the "Item Barcode" is also listed. The "Query Filters" section contains two filters: "Received Date" set to "Greater than or Equal to" with the date "9/1/2015 12:00:00 AM", and "Item Barcode" set to "Not Equal to" with an empty field.

Acquisitions  
universe  
query

The screenshot shows the "Result Objects" section with five items: "Items Checked Out" (marked with a yellow "MM" icon), "Event Date", "Item Call Number", "Item Permanent Shelving Location", and "Item Barcode". The "Query Filters" section contains three filters: "Event Date" set to "Greater than or Equal to" with the date "9/1/2015", "Item Barcode" set to "Not Equal to" with an empty field, and "Items Checked Out" set to "Greater than or Equal to" with the value "3".

Circulation  
Events  
universe  
query

# Report Designer - what you can do

## Acquisitions Reports

**Result Objects**

System Invoice Number	Vendor Name	OCLC Number	Call Number	Title	KB Collection Name
Invoice Item Description	Invoice Number	Invoice Date	Invoice Paid Date	Fund Code	
Order Item Number	Received Date	Expended Amount			

**Query Filters**

Budget Transaction Date	Between	Enter value(s) for Budget Tra	And	Enter value(s) for Budget Tra
Budget Transaction Type	In List	EXPENDED		



# Report Designer - what you can do

## Acquisitions Reports

For ACRL / IPEDS Reporting

Category	Electronic	Print	Other	Total
<b>One time</b>	<b>\$30,570.03</b>	<b>\$37,297.78</b>	<b>\$76,814.34</b>	<b>\$144,682.15</b>
Book	\$7,209.73	\$33,688.46		\$40,898.19
Media	\$23,360.30	\$3,609.32		\$26,969.62
Other			\$76,814.34	\$76,814.34
<b>Ongoing</b>	<b>\$1,117,022.11</b>	<b>\$94,797.16</b>	<b>\$90,089.90</b>	<b>\$1,301,909.17</b>
Book	\$29,045.26	\$7,329.00		\$36,374.26
Database	\$585,462.19			\$585,462.19
Media	\$26,468.38			\$26,468.38
Other			\$90,089.90	\$90,089.90
Serial	\$476,046.28	\$87,468.16		\$563,514.44
<b>Total</b>	<b>\$1,147,592.14</b>	<b>\$132,094.94</b>	<b>\$166,904.24</b>	<b>\$1,446,591.32</b>

Branch Name	Title	Banner Co	Fund Subje	Fund	Shelving Locat	Print/E/Other	Book/Serial/N	One time/Ong	Vendor Name	Expended Am	Budget Status	Order Type	Acquisitions T	Processing Ty	Material Form
Main Library	Correctional la	760630	JUS	SP	Reference Roo	Print	Serial	Ongoing	EBSCO	194.95	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Main Library	Strategies	760630	EXE	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	193.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Music Library	Werke	760630	MUS	SP	Collected Wor	Print	Serial	Ongoing	Theodore Fron	192.00	CURRENT	PLAN:STANDI	SUBSCRIPTIO	SERIAL	MsScr
Main Library	Educational Fo	760630	EDU	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	191.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Blank	Service Charg	760630	SER	SE	Blank	Electronic	Serial	Ongoing	EBSCO	190.65	CURRENT	Blank	Blank	Blank	Blank
Main Library	NFPA journal :	760630	JUS	SC	3rd Floor - Per	Print	Serial	Ongoing	EBSCO	190.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Main Library	NFPA journal :	760630	JUS	SC	3rd Floor - Per	Print	Serial	Ongoing	EBSCO	190.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Main Library	Journal of gan	760630	JUS	SP	3rd Floor - Per	Print	Serial	Ongoing	EBSCO	190.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Main Library	Guidelines for	760610	TEC	MS	Help Desk - 2	Print	Book	One time	Amazon.com,	188.21	CURRENT	PURCHASE_O	FIRM_ORDER	SINGLE_VOLL	Book
Main Library	Literacy Resea	760630	EDU	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	188.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Business Library a	Barron's.	760630	ACC	SP	Periodicals	Print	Serial	Ongoing	EBSCO	184.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Main Library	Journal of the	760630	MUS	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	184.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Main Library	TechTrends	760630	TEC	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	183.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Main Library	Canadian Journ	760630	GOV	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	181.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Main Library	Philosophical R	760630	PHI	SE	Online eJourn	Electronic	Serial	Ongoing	EBSCO	179.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	E_PRODUCT	Jrnl_Digital
Main Library	Big Swords, Je	760610	HIS	MS	4th Floor - Boc	Print	Book	One time	Amazon.com,	175.61	CURRENT	PURCHASE_O	FIRM_ORDER	SINGLE_VOLL	Book
Main Library	TLS, the Time	760630	LIS	SP	Reference Roo	Print	Serial	Ongoing	EBSCO	175.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Music Library	Directory of m	760630	MUS	SP	Reference	Print	Serial	Ongoing	EBSCO	175.00	CURRENT	PURCHASE_O	SUBSCRIPTIO	SERIAL	Jrnl
Blank	Service Charg	760620	SER	DB	Blank	Electronic	Database	Ongoing	EBSCO	175.00	CURRENT	Blank	Blank	Blank	Blank
Main Library	Punishment In	760610	JUS	MS	Online eBooks	Electronic	Book	One time	ProQuest LLC	173.25	CURRENT	PURCHASE_O	FIRM_ORDER	E_PRODUCT	Book_Digital



# Miscellaneous Problems


# Collection Evaluation: *Format field not entirely accurate*

Ex: “Book, Print” format may be applied to online records because of how OCLC determines eBook status...

OCLC Num	Format	Title	Ac
44461646	Book ,Print	Climate change impacts on the United States : the potential consequences of climate variability and change /	N

Climate change impacts on the United States : the potential consequences of climate variability and change

by [National Assessment Synthesis Team \(U.S.\), U.S. Global Change Research Program](#)

 **Print book [2000]**

Held by: [EKU Libraries](#)

[Access online](#)

▼ Desc

856 4 **1** [Su http://purl.access.gpo.gov/GPO/LPS4818](http://purl.access.gpo.gov/GPO/LPS4818)

Publication: [Washington, D.C.] : The Program, [2000]

Edition: Public review draft.

Physical Description: **1 online resource**

Language: English


Staff View: [MARC Record](#)

OCLC Number: 44461646

# Collection Evaluation: *Format field not entirely accurate*

...or because Collection Manager is using a print record instead of online

1. [The Cambridge companion to Shakespearean tragedy](#)  
by [Claire McEachern](#)



Print book 2013

This revised and updated Companion acquaints the reader with the plays and the poet, and is considered to be Shakespeare's tragedies. Thirteen...

Held by: [EKU Libraries](#)

[Access online](#)

OCLC Num	Format	Title
828626806	Book ,Print	The Cambridge companion to Shakespearean tragedy /
845085376	Book ,Print	The Cambridge companion to the poetry of the First World War /

Title: Cambridge Companion to Shakespearean Tragedy, The

Cannot Save Local Edits Cooperative Management

Title \* Cambridge Companion to Shakespearean Tragedy, The

Format e-Book

Vendor ID

Title URL <http://dx.doi.org/10.1017/9780521873827>

Created 04/17/2016, 01:16 PM

OCN 828626806

Override OCN 828626806

Grouped OCNs

867738272	+
873865498	+
895067124	+

For print record

These are online records

# Collection Evaluation: *Data problems*

Subject assignment only as good as data entered into call number fields

- Music CDs categorized as:

“Diplomatics. Archives,”

“Diseases of Organs, Glands,  
Systems,” etc.

OCLC Num	Format	Subject	Title	Author	LC Call Number	Dewey Call Number	Local Call Number
21207122	Music	Domestic Engineering	With love /	Clooney, Rosemary,		644	CD000 C64
44864720	Music	Diplomatics. Archives	Willy and the poor boys /	Creedence Clearwater R	CD782.4266 C	782.4217	CD2965
25874626	Music	Diseases of Organs, Glands, Systems	GoodFellas : music from the motion		Atlantic 7 82152	616	CD3079
14293272	Music	Diplomatics. Archives	5 song cycles /	Nummi, Seppo, 1932-198	CD0091		CD950 N97
22038092	Music	Naval Maintenance	Symphony no. 4 in F minor, op. 36 ; Serenade in C major for string orchestra,	Tchaikovsky, Peter Il'ich,	VC790798-2	784.184	CD820 T24
15547168	Music	Therapeutics, Pharmacology	Boleïro ; Pavane pour une infante delfunte ; Rapsodie espagnole ; Daphnis	Ravel, Maurice, 1875-193	RM1000		CD832 R25

???

## OCLC Conspectus by Division / Category

Library Science, Generalities & Reference			
Division	Category	LC Call Number	Dewey Call Number
Library Science, Generalities & Reference	Collections	AC0-9999	040-049 080-089
	Encyclopedias	AE0-9999	030-039
	Dictionaries, General Reference	AG0-9999	000 028.7
		AI0-9999	050
		AN0-9999	---
		AP0-9999	051-059
	Academies & Learned Societies	AS0-9999	060-068
	Yearbooks, Almanacs, Directories	AY0-9999	---
	History of Scholarship & Learning	AZ0-9999	001 007
	Diplomatics. Archives	CD0-4999	---

# Report Designer: Invoice Paid Report problem

ADMIN POV

Branch Name	Budget Trans	Title	Fund Code	Shelving Location	Copies	Expended Am	Budget Period	Order Type	Acquisitions T	Processing Ty	Material Form	Vendor Name	Invoice Paid Date	Order Number
Learning Res	EXPENDED	Toucans, too	LRC-MS	Youth Collection - Book	1	15.44	2017 Jul - 20	PURCHASE_O FIRM_ORDER_SINGLE_VOLL	Book			Follett Library	9/20/2017 17:15	PO-2017-186
Learning Res	EXPENDED	What's the big	LRC-MS	Youth Collection - Book	1	15.44	2017 Jul - 20	PURCHASE_O FIRM_ORDER_SINGLE_VOLL	Book			Follett Library	9/20/2017 17:15	PO-2017-186
Learning Res	EXPENDED	Wordplay /	LRC-MS	Youth Collection - Book	1	15.44	2017 Jul - 20	PURCHASE_O FIRM_ORDER_SINGLE_VOLL	Book			Follett Library	9/20/2017 17:15	PO-2017-186
Learning Res	EXPENDED	Young Palesti	LRC-MS	Youth Collection - Book	1	18.04	2017 Jul - 20	PURCHASE_O FIRM_ORDER_SINGLE_VOLL	Book			Follett Library	9/20/2017 17:15	PO-2017-186
Main Library	EXPENDED	Global Issues	MUL-DB	Online databases	1	6199.57	2017 Jul - 20	PURCHASE_O SUBSCRIPTICE_PRODUCT	Book Continu			Gale Cengage	7/18/2017 18:16	PO-2017-150
Main Library	EXPENDED	Literature Res	ENG-DB	Online databases	1	5337.15	2017 Jul - 20	PURCHASE_O SUBSCRIPTICE_PRODUCT	Book Continu			Gale Cengage	7/21/2017 16:23	PO-2017-159
Main Library	EXPENDED	Opposing View	MUL-DB	Online databases	1	18737.44	2017 Jul - 20	PURCHASE_O SUBSCRIPTICE_PRODUCT	Book Continu			Gale Cengage	7/21/2017 16:24	PO-2017-159
Main Library	EXPENDED	Gale Virtual R	REF-MC	Online eBooks	1	600	2017 Jul - 20	PURCHASE_O SUBSCRIPTICE_PRODUCT	Book Continu			Gale Cengage	7/11/2017 20:00	PO-2017-147
	EXPENDED		REF-SE		0	588.29	2017 Jul - 2018 Jun					Gale Cengage	7/21/2017 13:05	
	EXPENDED		REF-SE		0	1586.71	2017 Jul - 2018 Jun					Gale Cengage	8/8/2017 15:30	
	EXPENDED		REF-SE		0	588.29	2017 Jul - 2018 Jun					Gale Cengage	8/8/2017 15:32	
	EXPENDED		REF-SE		0	879.49	2017 Jul - 2018 Jun					Gale Cengage	9/14/2017 17:21	
	EXPENDED		REF-SE		0	588.29	2017 Jul - 2018 Jun					Gale Cengage	9/14/2017 17:23	
Main Library	EXPENDED	Science	BIO-SE	Online eJournals	1	7700	2017 Jul - 20	PURCHASE_O SUBSCRIPTICE_PRODUCT	Jrnl_Digital			Library Discov	7/26/2017 19:57	PO-2017-129
Main Library	EXPENDED	Academic Vid	MUL-MC	Online streaming video	1	19045	2017 Jul - 20	PURCHASE_O SUBSCRIPTICE_PRODUCT	Book Continu			Library Discov	7/19/2017 17:13	PO-2017-129

Missing Data from Payment Activity by Location Report. Why? Standing order? User error?

Invoice Number\*

61224770

Invoice Date\*

08/25/2017

Status

Paid

Date Created

09/14/2017

Date Last Updated

09/14/2017

Date Paid

09/14/2017

Vendor

[Gale Cengage Learning](#)

Currency

USD US dollar

Notes

check request

☐ Include tax on service charge and shipping

Results 1 - 1 of 1

Rows 5

Title	Order #	Inv. (%)	Budget/Fund	Qty	Unit Price	Disc (%)	Srv Chgs	Shipping	Tax 1 (%)	Total	Notes
International Directory of Comp		100.00	2017-2018 (1 Year) Reference-SE <a href="#">Assign multiple budgets/funds</a>	1	588.29	0.00	0.00	0.00	0.00	588.29	

## ADMIN POV

<b>Invoice Number*</b>	<b>Invoice Date*</b>	<b>Status</b>
1913848	08/22/2016	Paid
<b>Date Created</b>	<b>Date Last Updated</b>	<b>Date Paid</b>
08/25/2016	08/25/2016	08/25/2016
<b>Vendor</b>	<b>Currency</b>	
<a href="#">Amazon US</a>	USD US dollar	
<b>Notes</b>		

☐ Include tax on service charge and shipping

Results 1 - 2 of 2

Invoices paid without being attached to metadata record do not include title field in report.

Title	Order #	Inv. (%)	Budget/Fund	Qty	Unit Price	Disc (%)	Srv Chgs	Shipping	Tax 1 (%)	Total
<input type="checkbox"/> Fashion and [...]	<a href="#">PO-2016-433</a>	100.00	2016-2017 (1 Year) Anthropology-MS <a href="#">Assign multiple budgets/funds</a>	1	106.40	0.00	0.00	0.00	0.00	106.40
<input type="checkbox"/> Learning resources viewthru g		100.00	2016-2017 (1 Year) Learning Resources C <a href="#">Assign multiple budgets/funds</a>	1	13.49	0.00	0.00	0.00	0.00	13.49

# Invoice Paid Report problem

Can get title names that aren't connected to a metadata item (where we manually put in "title")

Needed to add "Invoice Item Description" from Acquisitions universe

However, the report is still missing fields such as shelving location, format, etc.

The screenshot shows a software interface with three main sections:

- Result Objects:** Contains two buttons: "Title" and "Invoice Item Description".
- Query Filters:** Contains a filter for "Invoice Number" set to "In List" with a value of "1913848".
- Data Preview:** A table with two columns: "Title" and "Invoice Item Description".

Title	Invoice Item Description
Fashion and masculinity in Re...	Learning resources viewthru geometric solids (14Colored)

# Report Designer: Collection Manager data not included

Only option right now is to download one massive file

Need ability to export with limits by:

- Collection(s)
- Format (eBooks, eJournals, etc.)
- DDA Triggered vs. not triggered
- Provider(s)

Fields needed:

- Title
- ISBN
- Publisher
- Collection Name/ID
- Activation status of title

The screenshot displays the WorldShare Record Manager interface. The top navigation bar includes tabs for Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The left sidebar contains a 'Record Manager' section with a 'Collection Manager' dropdown. Below this, there is a search section with a 'Scope' dropdown set to 'Collection', a 'Search Term(s)' input field, and a 'Limit by' section with a checked box for 'My Selected Collections'. The 'Settings' button in the sidebar is highlighted with a red box. The main content area shows the 'Settings' page for the 'Collection Manager'. It includes a 'Save' button, a 'Knowledge Base Data' dropdown (also highlighted with a red box), and tabs for 'Data Sources', 'Download KB Data', and 'Upload KB Data'. The 'Download KB Data' tab is active, showing a 'Download KB Data File' section with a 'Download' dropdown set to 'My KBART file' and a 'File Encoding' dropdown set to 'UTF-8'. A 'Download' button is located below these dropdowns. At the bottom of the page, there is a 'WorldCat Holdings' section.



# Inventory: WITHDRAWN item status is misleading

Applied anytime a barcode is deleted

Status	Withdrawn
--------	-----------

But what if it was an accident? Wrong record, cataloger fumble, accidentally hit wrong button

Our solution: Staff submit withdrawal stats to google form




→ Enhancement request: let staff *manually* set item status to withdrawn

Local Holdings Available.

Build Automated Summary

You can only select up to 10 local holdings records to move to a different location.

Results 1 - 1 of 1

	Call Number	Barcode	Shared Print	Branch	Shelving Location	Lending Policy	Action
<input type="checkbox"/>	<a href="#">PR6103.L375</a>	<a href="#">31234012751119</a>		KEUC	4th Floor - Books	Unknown	  

Results 1 - 1 of 1

Rows 10

Add "Withdraw" button under "Action"

# WMS Analytics: The eBook problem

OCLC documentation does not appear to follow current guidelines

Format/Facet in WorldCat.org	Index values		MARC record criteria				
	x0:	x4:	Leader/06	Leader/07	Field 008	Material types	Other criteria or note
eBook	Book	Digital	a, t	m, c, d	008/23=s		856/u is present and indicator 2 = blank or 0

From “[Searching Worldcat Indexes - Format/Document Type values and codes for Worldshare and Worldcat Discovery](#)” website



From the PCC’s  
“[Provider-Neutral E-Resource MARC Record Guide](#)”  
document (dated Aug  
30, 2017)

MARC Element	MARC Label	RDA Element	Serials & Integrating Resources (IRs)	Monographs	Notes
<a href="#">008/23</a> <a href="#">008/29</a>	Form of item	[MARC control field equivalent of Carrier type (online resource)] 3.3	M	M	Use code “o” in 008/23 for all formats except Cartographic and Visual materials. These two formats use byte 008/29 instead.

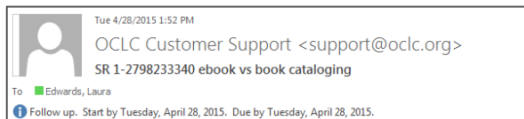
*RDA Provider-Neutral Guidelines for Serials and Monographs*

# WMS Analytics: The eBook problem

It all hinges on the 856 field...

...But not always?

OCCLC Support stated:



The ebook display icon is generated off the 2nd indicator coding of the 856 field (URL) This record does not have one, so the ebook icon will not display. As long as you are the only holding library you should be able to

\*OCLC #907934602 is a hybrid record, which in its current state could cause print and electronic records to incorrectly merge.

I have made these corrections:

The print ISBNs have been placed in 020 \$z The record was not coded RDA, so I added a GMD in the 245 field.

The ebook display icon is generated off the 2nd indicator coding of the 856 field (URL) This record does not have one, so the ebook icon will not display. As long as you are the only holding library you should be able to edit the record.

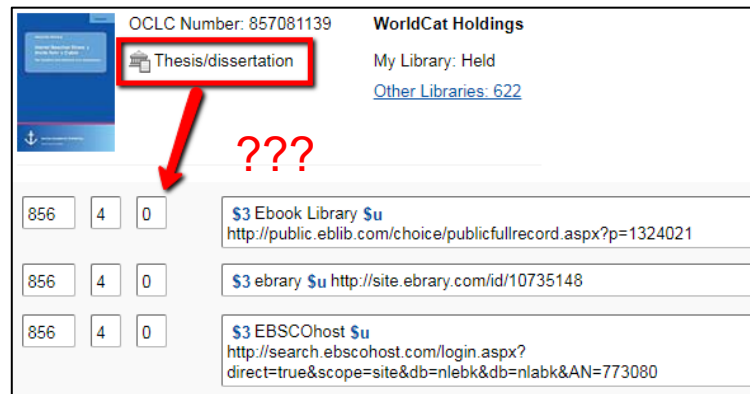
Additionally, there should be 1 record for the print version and 1 record for the electronic version.  
hybrid records cause inappropriate merges."

I hope this helps. Please let me know if you have any other questions.

Barb Conger

OCLC Customer Support

[THREAD ID: 1-1ACRMWU]



# WMS Analytics: The eBook problem

OCLC Num	Format	Title	PubDate	Edition	Publisher	URI	LC Call Num	Local Call Num	Location
<b>766119</b>	<b>Book ,eBook</b>	<b>Mental tests, their</b>	<b>1939</b>	<b>Rev. ed.</b>	<b>Houghton</b>	<b><a href="http://psycnet.apa.org/psycnet/1939/0001-0001-0001-0001">http://psycnet.apa.org/psycnet/1939/0001-0001-0001-0001</a></b>	<b>LB1131</b>	<b>LB1131 .F</b>	<b>KEUC 4th Floor - Books</b>
32844889	Computer F	Student data handboc	1995	Electronic ve	National Cer	<a href="http://purl.org/psycnet/1995/0001-0001-0001-0001">http://purl.org/psycnet/1995/0001-0001-0001-0001</a>	LB2846		Government Documents
6316991	Book ,eBook	The Advent lyrics of t	1970		Princeton Un	<a href="https://libra.org/psycnet/1970/0001-0001-0001-0001">https://libra.org/psycnet/1970/0001-0001-0001-0001</a>	PR1519		
7810956	Book ,eBook	The Inferno of Dante	1981		Princeton Un	<a href="http://search.proquest.com/psycnet/1981/0001-0001-0001-0001">http://search.proquest.com/psycnet/1981/0001-0001-0001-0001</a>	PQ4315.2		
10809070	Book ,eBook	The epigram in the Er	1962		Princeton Un	<a href="https://libra.org/psycnet/1962/0001-0001-0001-0001">https://libra.org/psycnet/1962/0001-0001-0001-0001</a>	PN6281		
12255899	Computer F	Making music on micro	1985		Random Ho	null	MT6.H657	MT41 .H63	KEUM Books
19741533	Book ,eBook	Encounters with Amer	1990		University o	<a href="http://site.ebrary.com/psycnet/1990/0001-0001-0001-0001">http://site.ebrary.com/psycnet/1990/0001-0001-0001-0001</a>	F158.9.A1	F158.9.A1 E	KEUC 4th Floor - Books
26064191	Computer F	Digitized strong-motio	1992		The Survey	null	QE535		
27122738	Computer F	Photographs from the	1992		The Survey	null	QE521		
27310561	Computer F	National energy resea	1992		U.S. Geolog	null	TN271.P4		
27408729	Computer F	U.S. Census Index Se	1992		Automated	null		In Process	KEUC Contact Library Staff
27813639	Internet Re	CONSER cataloging m	1993		Library of C	<a href="https://www.conser.org/psycnet/1993/0001-0001-0001-0001">https://www.conser.org/psycnet/1993/0001-0001-0001-0001</a>	Z699.4.C25	Z699.4.C25	KEUC 4th Floor - Books
28464915	Computer F	Modern average globa	1993						
29526763	Computer F	Marriage records early	1993						
29613412	Computer F	Death record series. 1	1993						
30564844	Computer F	Automated family pec	1993						
30576046	Computer F	[Congressional record	1992						
30639980	Computer F	1990 census of popul	1994						
30749736	Computer F	1990 census of popul	1994						
30749776	Computer F	1990 census of popul	1994						
30749795	Computer F	1990 census of popul	1994						

 **APA PsycNET<sup>®</sup>**



**You do not have access to the selected product**

If you do have access rights to the selected product, please contact APA's customer service:  
call 1-800-374-2722 (US or Canada) or email [developer@apa.org](mailto:developer@apa.org)

# Questions?

## Understand your question (*The Why*)

- Why do you need it? (*AKA who is your audience*)
- Articulate what combination of metrics you need to answer the question

## Understand the data (*The What*)

- Where is it coming from?
- Who/what is inputting it?
- Does it mean what you think it means?

Slides available at

[http://encompass.eku.edu/fs\\_research/191](http://encompass.eku.edu/fs_research/191)

Laura Edwards [laura.edwards@eku.edu](mailto:laura.edwards@eku.edu)

Todd King [todd.king@eku.edu](mailto:todd.king@eku.edu)

Kelly Smith [kelly.smith2@eku.edu](mailto:kelly.smith2@eku.edu)