Utilizing Analytics for Collection Development

Presenter:

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THE UNIVERSITY OF TEXAS AT DALLAS
Eugene McDermott Library

What This Presentation Will Cover

Overview of what led to the different collection development reports.

Covering different type of reports that and going over some of the benefits and issues with the different approaches.

Providing some tips on what to watch out for when you are recreating the reports.

Note: All reports in this presentation will be in the Community Zone under UTD. Some may need to be altered to work for your institution.

What Occurred

- September 2020 – New fiscal period began with reductions in budgets due to Covid.

- Needed a way for selectors to see the collection from a macro perspective to assist with ordering.

- What started out as a few base reports for checking orders and monitoring expenditures resulted in the development of a more comprehensive set of collection analysis reports.

What the Data Provided

- Ability to see what was in the collection.

- See what was in demand by students, faculty and staff.

- Identified collection gaps and address them.

- Gave a framework for other potential projects.

SQL Examples (To Make Your Life Easier)

Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC")

Provides the publication date without the "additions".

Note: Use a biographic details field, change the statement to the one above and then use a customized heading to label it as Publication Date. An example of a heading change is included on the additional information slide.

Results using regular publication date

Results using OO8 MARC

SQL Examples (To Make Your Life Easier)- Continued

First Subject Term

evaluate('regexp_substr(%1,''[^\;]+'', 1,1)',REPLACE("Bibliographic Details"."Subjects",';','\;'))

Second Subject Term.

evaluate('regexp_substr(%1,''[^\;]+'', 1,2)',REPLACE("Bibliographic Details"."Subjects",';','\;'))

You can add additional terms as needed, by changing the (1,2) the second numerical value of the expression.

You will want to use a customized heading to label the column correctly.

This allows for separation of subjects. Good if you want to provide reports that have single subject focus. Can also be helpful with cataloging in some limited situations.

SQL Examples (To Make Your Life Easier)- Continued

Time Stamp Limiters:

This Bib time stamp is useful to pull bibs created between 1 and 2 months ago. You can adjust the variables to increase range. Use Creation Date under Bibliographic Details with the Physical Item Subject Area. You can also use item creation date as an alternative, if you are looking for new individual items, rather than new bibliographic records.

"Bibliographic Details"."Creation Date">= (TIMESTAMPADD(SQL_TSI_month,-2, CURRENT_DATE)) AND "Bibliographic Details"."Creation Date"<= (TIMESTAMPADD(SQL_TSI_month,-1, CURRENT_DATE))

Portfolio Time Stamp Limiter is used to bring in only portfolios created in the past month. Use Portfolio Creation Date under Portfolio Creation Date with the E-inventory subject area.

"Portfolio Activation Date"."Portfolio Activation Date" >= (TIMESTAMPADD(SQL_TSI_month,-1, CURRENT_DATE))
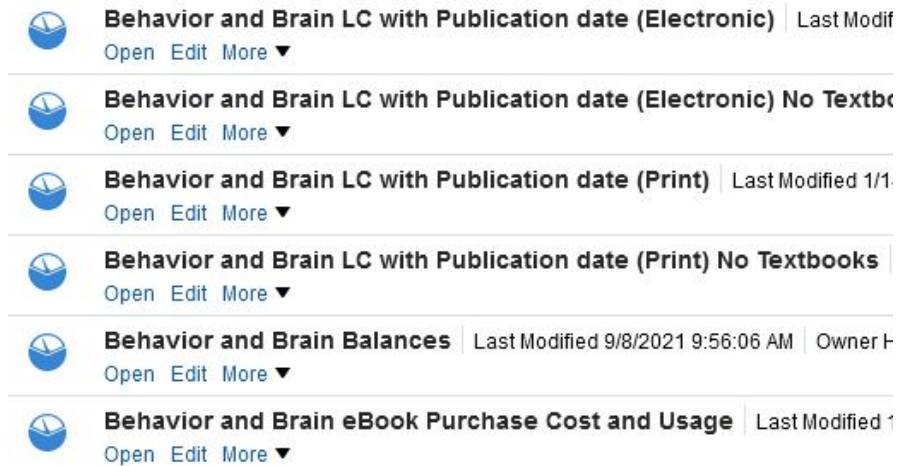
Organizational Tips

2 Think of structuring a base report and then save that report.

2 Change the facets and/or limiters of the base report to provide views of the data without compromising the core base report.

2 Organize the naming conventions of the reports to reflect what they are. As you create more and more variations organization will be paramount.

Reference and Selectors
- Behavior and Brain Rep
- Engineering Reports
- Film, Music, Art Report
- Healthcare and Medicin
- Interdisciplinary Studies
- JSOM Report Folder
- Landing Page
- Media And Reference R
- Religion and Philosoph
- SCIENCE and MATH RI
- Theatre and Dance Rep

Organized each of the reports under the dashboard that would eventually become the liaison/selector individual dashboards.

Behavior and Brain LC with Publication date (Electronic) | Last Modif
Open Edit More ▼

Behavior and Brain LC with Publication date (Electronic) No Textbo
Open Edit More ▼

Behavior and Brain LC with Publication date (Print) | Last Modified 1/1
Open Edit More ▼

Behavior and Brain LC with Publication date (Print) No Textbooks
Open Edit More ▼

Behavior and Brain Balances | Last Modified 9/8/2021 9:56:06 AM | Owner H
Open Edit More ▼

Behavior and Brain eBook Purchase Cost and Usage | Last Modified 1
Open Edit More ▼

Identify print/electronic reports and use similar naming conventions between dashboards to quickly identify the reports and keep everything organized.

Approaches On Limiting

LC Limiting

- ## Benefits:
  - Faster reports – especially with dashboard when utilizing dashboards.
  - Generally, less time consuming to create.

- ## Issues:
  - Will pull everything in an LC area. May need to spend time on refining/limiting the report.
  - May need to create additional reports to reflect more nuances in the collection.

Subject Limiting

- ## Benefits:
  - Can narrowly tailor a report to specific subjects.

- ## Issues:
  - The more subjects included in the report the slower the report responds. Reports can take 10+ minutes to return results.
  - May need to factor in subject variations to prevent irrelevant/inaccurate returns.

Three Data Points Worth Examining Within Your Collection

Usage

Age

Number of Items

Sample Report: Print Usage Broken Down by Publication Date

Sample Report: Print Usage Broken Down by Publication Date –Data Returns

Overall Usage

Publication Date ▲▼	Checkouts	Browses	Checkouts+Browses
2022	2	4	6
2021	7	2	9
2020	11	3	14
2019	81	83	164
2018	140	165	305
2017	114	119	233
2016	297	253	550
2015	196	190	386
2014	1,006	271	1,277
2013	220	346	566
2012	496	400	896

Usage if limited to a specific loan year (2021)

Publication Date ▲▼	Checkouts	Browses	Checkouts+Browses
2021	2	0	2
2020	4	1	5
2019	29	13	42
2018	36	14	50
2017	16	10	26
2016	44	16	60
2015	8	6	14
2014	8	12	20
2013	12	3	15
2012	41	23	64

Sample Report: Usage Broken Down by LC

Sample Report: Usage Broken Down by LC – Data Returns

Overall Usage

Pivot Table

Classification Code	Checkouts	Browses	Checkouts+Browses
BC	150	256	406
P	2,612	1,778	4,390
QP	1,239	997	2,236
R	109	78	187
RC	5,052	4,363	9,415

Usage if limited to a specific loan year (2021)

Pivot Table

Classification Code	Checkouts	Browses	Checkouts+Browses
BC	13	6	19
P	66	49	115
QP	52	22	74
R	2	2	4
RC	354	187	541

Sample Report: Lets Talk About Electronic Usage by LC

I have not found a preferred way to create a report that reflects year by year usage utilizing the E-Inventory subject area.

The following report will provide lifetime usage on a particular LC but cannot be limited by a specific usage year. This limits the usability of electronic usage reports.

An ideal fix would be the inclusion of a date range option to limit the counter usage data to specific periods of time.

LC Classifications	Cost Usage Measures
Classification Code ⚙	Usage - Total ⚙

◢ **Filters**

Fiscal Period Description is prompted
AND Material Type is equal to / is in Book
AND Classification Code is not null
AND Lifecycle is equal to / is in In Repository
AND Classification Code is equal to / is in BC; BF; HQ; RF
OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

Sample Report: Lets Talk About Electronic Usage by LC - Data Returns

Title

Behavior and Brain LC Usage (Electronic)

Table

Classification Code	Usage - Total
BC	27
P	7,345
QP	823
R	186
RC	5,812

Sample Report: Number of Books in an LC by Publication Date(eBooks)

Bibliographic Details	LC Classifications	Portfolio
Publication Date ⚙	Classification Code ⚙	No. of Available Portfolio ⚙

Filters

Lifecycle is equal to / is in In Repository

AND Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

AND Material Type is equal to / is in Book

AND Classification Code is equal to / is in BC; BF; HQ; RF

OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

Sample Report: Number of Books by LC and Publication Year (eBooks)-Data Returns

Publication Date ▲▼	Classification Code	No. of Available Portfolio
2023	P	3
2023	QP	3
2023	RC	11
2022	BC	3
2022	P	116
2022	QP	11
2022	R	7
2022	RC	241
2021	BC	14
2021	P	180
2021	QP	24
2021	R	32
2021	RC	384
2020	BC	4
2020	P	179
2020	QP	38
2020	R	29

Provides the breakdown of the number of available Electronic Portfolios within a specific publication date and is sortable by LC classification.

Note: This report will reflect all portfolios under a bib.

If removing the duplications is important you can adjust by adding a COUNT(DISTINCT "Bibliographic Details"."MMS Id") column to the report.

Sample Report: Number of Books by LC and Publication Year (eBooks)-Data Returns

Publication Date ▲▼	Classification Code	No. of Available Portfolio	COUNT(DISTINCT MMS Id)
2023	P	3	3
2023	QP	3	3
2023	RC	11	11
2022	BC	3	3
2022	P	116	116
2022	QP	11	11
2022	R	7	7
2022	RC	241	241
2021	BC	14	14
2021	P	180	178
2021	QP	24	23
2021	R	32	32
2021	RC	384	381
2020	BC	4	4
2020	P	179	173
2020	QP	38	38
2020	R	29	29
2020	RC	382	380

Example of the report with Count(Distinct MMS Id) added.

Sample Report: Number of Books LC by Publication Date(Print)

Bibliographic Details	Physical Item Details	LC Classifications
▦ Publication Date ⚙	▤ Num of Items (In Repository) ⚙	▦ Classification Code ⚙

◢ Filters

▼ Material Type is equal to / is in Book

AND ▼ Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

AND ▼ Classification Code is equal to / is in BC; BF; HQ; RF

    OR ▼ "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

AND ▼ Lifecycle is equal to / is in Active

Sample Report: Number of Books LC by Publication Date(Print)– Data Returns

Without MMSID Count Distinct

Publication Date ▲▼	Classification Code	Num of Items (In Repository)
2022	BC	2
2022	P	2
2022	QP	2
2022	RC	4
2021	P	8
2021	QP	1
2021	RC	12
2020	P	15
2020	RC	5
2019	BC	3
2019	P	21
2019	QP	10
2019	R	3
2019	RC	34
2018	BC	2

Including MMS ID Count Distinct

Publication Date ▲▼	Classification Code	Num of Items (In Repository)	COUNT(DISTINCT MMS Id)
2022	BC	2	2
2022	P	2	2
2022	QP	2	2
2022	RC	4	3
2021	P	8	8
2021	QP	1	1
2021	RC	12	12
2020	P	15	15
2020	RC	5	5
2019	BC	3	3
2019	P	21	21
2019	QP	10	9
2019	R	3	3
2019	RC	34	31
2018	BC	2	2

Sample Report: Number of Books (Print)

Physical Item Details	LC Classifications
Num of Items (In Repository) ⚙	Classification Code ⚙

◢ Filters

▼ Material Type is equal to / is in Book

AND ▼ Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

AND ▼ Classification Code is equal to / is in BC; BF; HQ; RF

OR ▼ "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

AND ▼ Lifecycle is equal to / is in Active

Sample Report: Number of Books (Print) – Data Returns

Without MMSID Count Distinct

Classification Code	Num of Items (In Repository)
BC	363
P	3,197
QP	1,812
R	137
RC	4,843

Including MMS ID Count Distinct

Classification Code	Num of Items (In Repository)	COUNT(DISTINCT MMS Id)
BC	363	357
P	3,197	2,998
QP	1,812	1,672
R	137	134
RC	4,843	4,566

Sample Report: Number of Portfolios (eBooks)

LC Classifications	Portfolio
▦ Classification Code ⚙	▤ No. of Available Portfolio ⚙

◢ **Filters**

▼ Lifecycle is equal to / is in In Repository

AND ▼ Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

AND ▼ Material Type is equal to / is in Book

AND ▼ Classification Code is equal to / is in BC; BF; HQ; RF

OR ▼ "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

Sample Report: Number of Portfolios (eBooks) –Data Returns

Without MMSID Count Distinct

Classification Code	No. of Available Portfolio
BC	597
P	8,979
QP	1,717
R	478
RC	16,082

Including MMS ID Count Distinct

Classification Code	No. of Available Portfolio	COUNT(DISTINCT MMS Id)
BC	597	538
P	8,979	8,557
QP	1,717	1,615
R	478	466
RC	16,082	15,672

Sample Report: Number of Books by LC and Publication Year (Print)

Bibliographic Details	Physical Item Details	LC Classifications
Publication Date ⚙	Num of Items (In Repository) ⚙	Classification Code ⚙

◢ **Filters**

▼ Material Type is equal to / is in Book

AND ▼ Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

AND ▼ Classification Code is equal to / is in BC; BF; HQ; RF

OR ▼ "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

Sample Report: Number of Books by LC and Publication Year (Print)– Data Returns

Publication Date ▲▼	Classification Code	Num of Items (In Repository)
2022	BC	2
2022	P	1
2022	QP	2
2022	RC	4
2021	P	7
2021	QP	1
2021	RC	12
2020	P	15
2020	RC	5
2019	BC	3
2019	P	21
2019	QP	10
2019	R	3
2019	RC	34
2018	BC	2
2018	P	29
2018	QP	15
2018	RC	33
2017	BC	3
2017	P	27
2017	QP	20
2017	R	3
2017	RC	25

Provides the breakdown of the print item inventory by publication date and LC classification.

Sample Report: Number of Portfolios by LC and Publication Year (eBooks)

Bibliographic Details	LC Classifications	Portfolio
Publication Date ⚙	Classification Code ⚙	No. of Available Portfolio ⚙

⊿ Filters

Lifecycle is equal to / is in In Repository

AND Evaluate('regexp_substr(%1,"[0-9]{4}", 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

AND Material Type is equal to / is in Book

AND　Classification Code is equal to / is in BC; BF; HQ; RF

OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854 ' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

Sample Report: Number of Portfolios by LC and Publication Year (eBooks) –Data Returns

Without MMSID Count Distinct

Publication Date	Classification Code	No. of Available Portfolio
2023	P	3
2023	QP	3
2023	RC	11
2022	BC	3
2022	P	116
2022	QP	11
2022	R	7
2022	RC	241
2021	BC	14
2021	P	180
2021	QP	24
2021	R	32
2021	RC	384
2020	BC	4

Including MMS ID Count Distinct

Publication Date	Classification Code	No. of Available Portfolio	COUNT(DISTINCT MMS Id)
2023	P	3	3
2023	QP	3	3
2023	RC	11	11
2022	BC	3	3
2022	P	116	116
2022	QP	11	11
2022	R	7	7
2022	RC	241	241
2021	BC	14	14
2021	P	180	178
2021	QP	24	23
2021	R	32	32
2021	RC	384	381
2020	BC	4	4

Bonus Reports:

Print Orders Between the Last 30 and 60 Days

Ebook Portfolio Activations Within the Last 30 Days

Financial Expenditures By LC Classification with the Percentage of the Fund Spent

Bonus Report: Electronic Portfolio Activations Within the Last 30 days

LC Classifications	Bibliographic Details				Portfolio	Electronic Collection
Classification Code	Author	Title	Material Type	Subjects	Material Type	Electronic Holdings	Electronic Collection Public Name

Lifecycle is equal to / is in In Repository

"Portfolio Activation Date"."Portfolio Activation Date" >= (TIMESTAMPADD(SQL_TSI_month,-1, CURRENT_DATE))

No. of Portfolio (In Repository) is equal to / is in 1

Material Type is prompted

Classification Code is equal to / is in BC; BF; HQ; RF

OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245 ' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

AND No. of Portfolio (In Repository) is equal to / is in 1

Used this filter to limit returns to only new items.

Bonus Report Electronic Portfolio Activations within the Last 30 days –Data Returns

Classification Code	Material Type	Author	Title	Electronic Collection Public Name	Electronic Holdings	Subjects
BC	Book	Thom, Paul, author.	Robert Kilwardby's science of logic : a thirteenth-century intensional logic /	ProQuest Academic Complete	Information Not Avalible	Logic.
P	Book		Formas de comunicacion en el siglo XXI /	ProQuest Academic Complete	Information Not Avalible	Social media.; Mass media.; Information technology.
P	Book		Key themes and new directions in systemic functional translation studies /	Taylor and Francis eBooks EBA	Information Not Avalible	Functionalism (Linguistics); Systemic grammar.; Translating and interpreting.
P	Journal		Nordic journal of media studies.	DOAJ Directory of Open Access Journals - Not for CDI Discovery	Available from 2019;	Mass media--Periodicals.; Communication and traffic--Periodicals.; Communication and traffic; Mass media; Electronic journals.; Periodicals
P	Journal		Phonetica.	De Gruyter journals	Available from 2020 volume: 77 issue: 1 until 2022 volume: 79;	Fonetiek.; Phonetics--Periodicals.; Phonetics.; Electronic journals.; Periodicals.; Periodical.
QP	Book		The Wiley handbook on the aging mind and brain /	ProQuest Academic Complete	Information Not Avalible	Brain--Aging--Handbooks, manuals, etc.
QP	Book	Beaumont, J. Graham, author	Introduction to neuropsychology /	ProQuest Academic Complete	Information Not Avalible	Neuropsychology--Textbooks.

Bonus Report: New Physical Items

LC Classifications	Holding Details	Bibliographic Details				Holding Details	Location
Classification Code ⚙	LC Subject ⚙	Title ⚙	Author ⚙	Material Type ⚙	Subjects ⚙	Permanent Call Number ⚙	Location Name ⚙

⊿ Filters

▼ Lifecycle is equal to / is in Active; None

AND ▼ "Bibliographic Details"."Creation Date">= (TIMESTAMPADD(SQL_TSI_month,-2, CURRENT_DATE)) AND "Bibliographic Details"."Creation Date"<= (TIMESTAMPADD(SQL_TSI_month,-1, CURRENT_DATE))

AND ▼ Material Type is prompted

AND ▼ Classification Code is equal to / is in BC; BF; HQ RF

OR ▼ "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R726.5' AND 'R726.8 ' OR "LC Classifications"."Start Range" BETWEEN 'QP351' AND 'QP495' OR "LC Classifications"."Start Range" BETWEEN 'R690' AND 'R697 ' OR "LC Classifications"."Start Range" BETWEEN 'R850' AND 'R854' OR "LC Classifications"."Start Range" BETWEEN 'RC952' AND 'RC1245' OR "LC Classifications"."Start Range" BETWEEN 'RC581' AND 'RC951 ' OR "LC Classifications"."Start Range" BETWEEN 'RC321' AND 'RC574 ' OR "LC Classifications"."Start Range" BETWEEN 'RC64' AND 'RC67 ' OR "LC Classifications"."Start Range" = 'RC58' OR "LC Classifications"."Start Range" = 'RJ78 ' OR "LC Classifications"."Start Range" = 'RJ85' OR "LC Classifications"."Start Range" = 'RJ365' OR "LC Classifications"."Start Range" BETWEEN 'RJ44' AND 'RJ45 ' OR "LC Classifications"."Start Range" BETWEEN 'RJ33.5 ' AND 'RJ33.8 ' OR "LC Classifications"."Classification Code" BETWEEN 'P1' AND 'P85' OR "LC Classifications"."Start Range" BETWEEN 'P87' AND 'P96' OR "LC Classifications"."Start Range" BETWEEN 'P99.5' AND 'P99.6' OR "LC Classifications"."Start Range" BETWEEN 'P101' AND 'P410'

"Bibliographic Details"."Creation Date">= (TIMESTAMPADD(SQL_TSI_month,-2, CURRENT_DATE)) AND "Bibliographic Details"."Creation Date"<= (TIMESTAMPADD(SQL_TSI_month,-1, CURRENT_DATE))

Used this timestamp to adjust for the cataloging and processing of the material and to allow time for materials to arrive on the shelf.

Bonus Report: New Physical Items– Data Returns

LC Subject	Title	Author	Location Name	Material Type	Permanent Call Number	Subjects
P	Abject performances : aesthetic strategies in Latino cultural production /	Alvarado, Leticia, 1982- author.	Stacks	Book	P94.5.H58 A48 2018	Hispanic American mass media--Social aspects.; Hispanic American arts--Social aspects.; Hispanic Americans and mass media.; Mass media and culture.
RC	A molecule away from madness : tales of the hijacked brain /	Peskin, Sara Manning, author.	Stacks	Book	RC327 .P47 2022	Neurosciences; Brain--Research.; Neurosciences.; Brain.; Informational works.

Bonus Report: Financial Expenditures By LC Classification with the Percentage of the Fund Spent

LC Classifications	Fund Transactions	
Classification Code ⚙	Transaction Expenditure Amount ⚙	Expenditure Percentage ⚙

⊿ **Filters**

Fund Ledger Name is equal to / is in MISC EBOOKS 22
AND Transaction Expenditure Amount is not null

Column Formula

"Fund Transactions"."Transaction Expenditure Amount" / SUM("Fund Transactions"."Transaction Expenditure Amount")*100

Column Properties

Style	Column Format	Data Format	Conditional F

☑ Override Default Data Format

Treat Numbers As   Percentage ▼

Negative Format   Minus: -123 ▼

Decimal Places   2 ▼

Expenditure Percentage
Formula

Note: Be sure to change the data format within the column properties to treat numbers as percentages.

Bonus Report: Financial Expenditures By LC Classification with the Percentage of Fund Spent Data Returns

Classification Code	Transaction Expenditure Amount	Expenditure Percentage
AM	$1,650.10	4.36%
B	$64.00	0.17%
BF	$535.90	1.41%
BL	$186.00	0.49%
BP	$819.04	2.16%
BQ	$40.43	0.11%
BR	$474.50	1.25%
CB	$68.00	0.18%
CD	$143.50	0.38%
CS	$111.38	0.29%
CT	$60.00	0.16%
D	$837.37	2.21%
DD	$140.14	0.37%
DG	$20.21	0.05%
DK	$903.33	2.38%

Where to Find the Reports Used in this Presentation
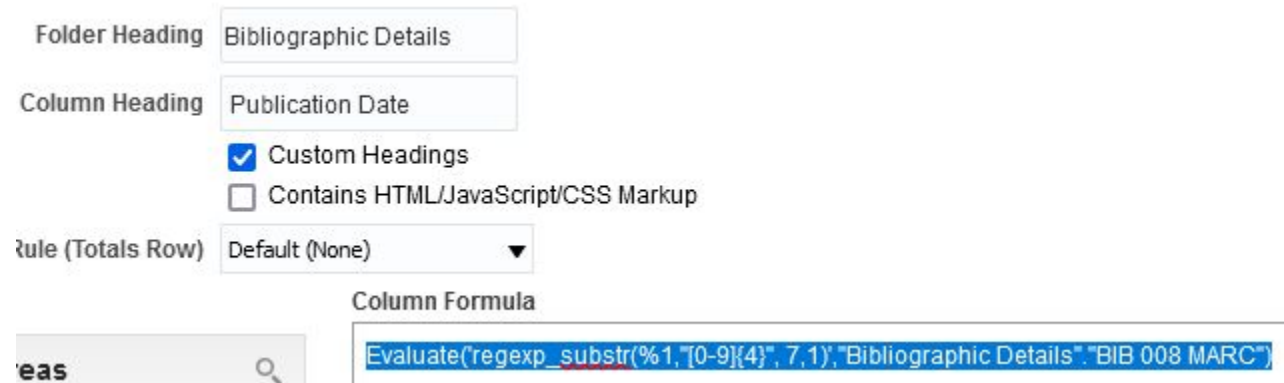
Additional Information

Folder Heading: Bibliographic Details

Column Heading: Publication Date

☑ Custom Headings
☐ Contains HTML/JavaScript/CSS Markup

Rule (Totals Row): Default (None)

Column Formula
Evaluate('regexp_substr(%1,''[0-9]{4}'', 7,1)',"Bibliographic Details"."BIB 008 MARC")

eas 🔍

Example of changing a column heading. This typically is recommended when you adjust a column formula.

Evaluate('regexp_substr(%1,''[0-9]{4}'', 7,1)',"Bibliographic Details"."BIB 008 MARC") NOT IN ('NULL', '9999')

Example of: Bib 008 Publication Date – with removal of any null or 9999 results: Used as a filter.

Questions?

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