About IFLS

49 Public Libraries in West-Central Wisconsin

Includes many small libraries

First Access in July 2013

Early adopters for upgrades

Lastest on 3/19/18, 1.2 SP4

About Decision Center

Data to support decisions about patron services

- Includes:
Historical reports
Collection "advice": adding, weeding, and item tracking

Good to Know

- Data goes back only as far as it's been collected
- Authorizations need to be assigned
- Accounting unit must be associated with login
- SCAT tables must be in good shape
- Multiple SCAT tables cannot have duplicate Category numbers
- Nothing to mess up, only misinterpret
- We use for planning and estimating, not annual reports
- Can see data across the system, or for location
- Results dependent on setup
- Decision Center has a good Guide and Reference

Set Up

- **Admin Tools**

Welcome, ifsetter | Admin Tools | Help | Sign out

- **Code Categories**
  - ◆ Physical Format –
    - mat type or itype
  - ◆ Collections –
    - itype or item location
- **Other Configuration**
  - ◆ Exclude item status
  - ◆ Show/hide reports
  - ◆ Scheduled reports

Our collections

Display Order	Category Name	Selected Properties
1	Adult Non-Fiction ⭐	Ogema Non-fiction,Ogema New Non-fiction,Boyceville Non-Fiction, more +
2	Adult Fiction	Ogema New Fiction,Boyceville Science Fic,Baldwin Fiction, more +
3	Adult Unspecified	Cameron Braille,Roberts DVDs,Eau Claire Magazines, more +
4	YA Non-Fiction	Deer Park YA Non-Fiction,Glenwood City YA Nonfic,Bloomer YA Non-fiction, more +
5	YA Fiction	New Richmond YA Fiction,Roberts YA Fiction,New Richmond YA Books on CD, more +
6	YA Unspecified	New Richmond YA Magazines,River Falls YA Magazines,Augusta YA Magazines, more +
7	Juvenile Non-Fiction	Chetek Juv DVD NF,Stanley Juv Non-Fiction,St. Croix Falls Easy Non-fic, more +
8	Juvenile Fiction	Chetek Juv DVD Fic,Chetek Juv Book & CD,Chetek Juv Board Books, more +
9	Juvenile Unspecified	Chetek Juv Book & Cass,Chetek Juv Audiobk Cassette,Chetek Juv Audiobk CD, more +

Getting Started

- Data is available to all
  - ◆ Only fiscal/Acq data is library specific
- What do you want to know?
- How does our system store that data?

In Decision Center:

- Expand each report type
- Scroll over report name to see description
- Once selecting a report, choose parameters
- Some reports take longer than others to display, depending on complexity
- Reports can be exported; formats differ according to report: Excel, PDF or Review file
- Trail follows where you are

Collection Tools > Evaluation > **Hourly Circulation by Day of the Week**

Evaluation Reports

- Statistical Information
- Historical Snapshot
- Has the largest number of reports
- When you find one that is useful, note the path to find it again

Acquisitions

- Must be using Acquisitions
- Shows data for Accounting unit assigned to login
- Expenditures and Trends by various criteria
- Data shown by quarter for current year
  - ◆ By years for previous years
- Can show % change

ACQUISITIONS

▼ Expenditures

Expenditures by Call Number Range and Formats

Expenditures by Call Number Range and Funds

Expenditures by Funds and Acquisition Type

Expenditures by Funds and Formats

Expenditures by Funds and Languages

Expenditures by Funds and Order Locations

Expenditures by Funds and Order Types

Expenditures by Funds and Vendors

▶ Expenditure Trends

Expenditure Trends by Format

Display

Amount ▼

☑ Show Percent Change

EMAIL / SCHEDULE   EXPORT

Item Type	Total for time period	Q4 FY 2017	Q3 FY 2017	Q2 FY 2017	Q1 FY 2017	FY 2016	FY 2015
All Formats	**$330,518.34** 0%	**$1,422.53** -89%	**$13,280.34** -6%	**$14,143.71** 19%	**$11,841.19** -27%	**$59,339.16** 5%	**$56,774.66** 42%
BOOKS	$207,411.48 0%	$1,086.59 -84%	$6,999.93 -24%	$9,178.89 21%	$7,612.64 -28%	$34,425.32 -5%	$36,362.84 42%
MUSIC CD	$17,210.22 0%	0 -100%	$607.62 -12%	$692.27 40%	$495.16 -58%	$2,879.12 12%	$2,578.80 22%
DVD/VIDEODISC	$39,269.65 0%	0 -100%	$2,000.68 -2%	$2,038.74 37%	$1,488.80 -11%	$7,397.85 -1%	$7,473.21 78%

Compare to Circulation by format to see if spending follows use.

Evaluation - Circulation

- Holdshelf Activity
  - ◆ Limit by date, ptype, format and/or collections

DATE 2017 · PATRON TYPE All Patron Types · PHYSICAL FORMAT All Physical Formats · COLLECTION All Collections

EMAIL / SCHEDULE   EXPORT

Transaction Location	Placed on Holdshelf	Picked Up From Holdshelf	Abandoned From Holdshelf	Abandoned Percentage
All Locations	717,189	675,830	43,830	6%
Chippewa Falls	42,331	39,370	2,774	7%
New Richmond	35,024	33,241	1,964	6%
Rice Lake	27,926	25,984	1,767	6%
Ladysmith	22,149	20,971	1,029	5%

CIRCULATION

▶ Agency
▶ Call Number Range
▼ Holdshelf
  Holdshelf Activity
  Holdshelf Trends
▶ Hourly Activity
▶ Items
▶ Owning Location
▶ Patrons
▶ Postal Code
▶ Resource Sharing (Local, ILL, INN-Reach)
▶ Statistics Group
▶ Top Titles
▶ Transaction Location
▶ Transaction Type

Evaluation – Circulation – Hourly Activity

Limit by date, ptype, format and/or collections
Broader range of dates
Can limit by locations
Can change transaction type
Does not do by number of patrons

▼ Hourly Activity

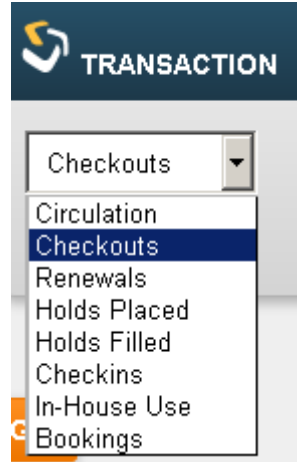Hourly Circulation by Call Number Range

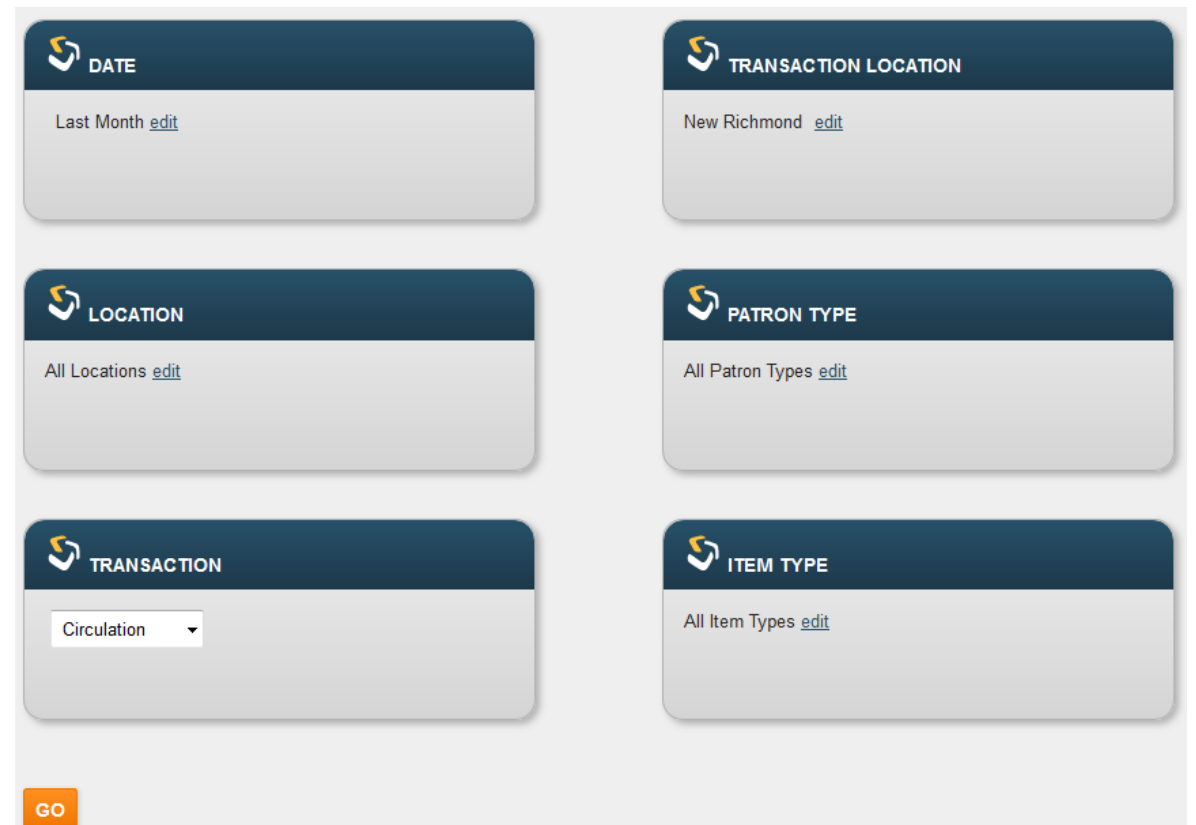Hourly Circulation by Day of the Week

Hourly Circulation by Patron Type

Hourly Circulation by Transaction Location

Hourly Circulation by Transaction Type

Hourly Circulation Trends

TRANSACTION

Checkouts

Circulation
Checkouts
Renewals
Holds Placed
Holds Filled
Checkins
In-House Use
Bookings

DATE
Last Month edit

TRANSACTION LOCATION
New Richmond edit

LOCATION
All Locations edit

PATRON TYPE
All Patron Types edit

TRANSACTION
Circulation

ITEM TYPE
All Item Types edit

GO

Hourly Circulation by Day of the Week

EMAIL / SCHEDULE **EXPORT**

Hour	All Days of the Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
All Hours	**15,737**	**179**	**2,162**	**3,167**	**2,706**	**2,603**	**2,725**	**2,195**
1200	1,206	1	141	234	150	142	254	284
1300	1,383	4	164	257	226	216	238	278
1400	1,786	28	239	241	325	206	334	413
1500	1,329	14	140	326	221	345	251	32

Evaluation – Circulation – Patrons

- Added Patrons by Patron Type
- Can limit by Home Library
- Data by month for current
  and previous year
  - By year before that
- See trends between libraries

▼ **Patrons**
    Added Patrons by Patron Type
    Current Patrons by Patron Type
    Deleted Patrons
    Added Patrons by Home Library
    Current Patrons by Home Library
    Patron Trends

Patron Type	All Times	Oct 2017	Sep 2017	Aug 2017	Jul 2017	Jun 2017	May 2017	Apr 2017
All Patron Types	473,950	200	1,622	1,646	1,641	2,280	1,196	1,509
ME Adult	19,762	10	88	94	89	105	57	88
CF Adult	17,266	13	68	98	75	87	66	83
EC Juvenile	13,053	3	53	106	103	160	61	389
CF Juvenile	5,011	5	24	39	35	82	23	10

Evaluation – Circulation – Top Titles

- Popular titles
- Be aware of date implications
- Can choose item types
  - Beware pairing with holds placed
- Choose transaction type
  - By Holds Placed
- Transaction Location All for system stats
- Gives top 100 titles by chosen transaction type
- Takes time!

DATE 06/01/2017 - 10/05/2017 • LOCATION All Locations • TRANSACTION Holds Placed • TRANSACTION LOCATION All Transaction Locations • PATRON TYPE All Patron Types • ITEM TYPE All Item Types • CALL NUMBER RANGE All Call Number Ranges • SHELF LOCATION All Shelf Locations

EMAIL / SCHEDULE   EXPORT

	Number	Bib Record No.	Title	Author	Count
	1	b2371449	Wonder Woman / Warner Bros. Pictures presents, in association with Tencent Pictures and Wanda Pictures ; an Atlas Entertainment (catalog)		492
	2	b2358237	Camino Island (catalog)	Grisham, John, author.	474
	3	b2365913	Gifted / Fox Searchlight Pictures presents ; a FilmNation Entertainment (catalog)		398
	4	b2370763	Dunkirk (catalog)		381
	5	b2366639	Beauty and the beast (catalog)		334
	6	b2370758	Going in style (catalog)		332
	7	b2369488	Snatched / Twentieth Century Fox presents a Chernin Entertainment (catalog)		326
	8	b2378088	The Glass Castle. (catalog)		326
	9	b2365720	The shack (catalog)		324
	10	b2374922	Spider-Man: homecoming (catalog)		311

TRANSACTION

Holds Placed
- Circulation
- Checkouts
- Renewals
- Holds Placed
- Holds Filled
- Checkins
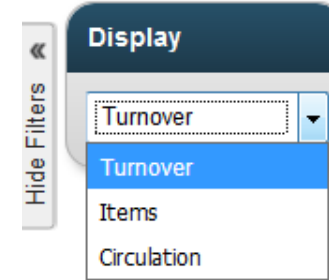- In-House Use
- Bookings

Use Case: Most checked out Magazines

Evaluation – Collection - Turnover

By Owning Location and Item Type
Most are system reports
Turnover by Shelf Location
can limit to one library

▼ Turnover

Turnover by Branch

Turnover by Material Type

Turnover by Owning Location and Item Type

Turnover by Shelf Location

Turnover by Transaction Location and Item Type

Turnover by Transaction Location and Material Type

Display

Hide Filters

| Turnover ▾ |
| Turnover |
| Items |
| Circulation |

Item Location Filter	Book and CD	Book and CDROM	Books	books<8	Braille book	CDROM/ software	DVD - 2 weeks	DVD - 3 Weeks	DVD/ videodisc	E- Reader	E- Tablet
Luck	1.733	0	0.763	0	0	0	4.906	3.5	4.244	0	0
Menomonie	5.372	0	3.908	0	0	2.109	8.536	0	11.204	15	0
Milltown	1.545	0	0.971	0	0	0	3.214	0	3.63	0	0
New Richmond	5.062	0	3.134	0	0	0	7.397	0	7.603	0	28.542

Evaluation – Encore – Facet and Tag Trends

- Which facets are used most often?
- Can see what is important to patrons

ENCORE
- ▸ Community Features
- ▸ Harvested Collections
- ▾ Searches
    - Facet and Tag Trends
    - Searches By Network Location
    - Search Trends
    - Unique Visits By Network Location
    - Unique Visit Trends

Transaction	Total	Oct 2017	Sep 2017	Aug 2017	Jul 2017	Jun 2017	May 2017	Apr 2017
Total	2,343,822	36,455	425,409	443,570	473,769	245,362	15,166	19,858
Format	1,053,661	14,388	173,892	178,558	200,231	99,661	6,939	9,378
Collection - Scopes	680,271	11,250	134,529	141,752	141,468	76,593	4,411	5,378
Availability	288,127	5,217	56,852	63,093	64,523	35,709	1,807	2,153
Tag Cloud	120,269	2,287	19,659	22,488	25,465	12,240	746	1,276

Development Reports
Information for adding to your collection

Budget Projection
by Collection
- ◆ Based on circulation of the previous year
- ◆ Enter budget amount
- ◆ Divides budget by Collections
- ◆ Can limit to certain formats
- ◆ Can override suggested amounts
  - ▪ Other values adjust (Recalculate)

| LOCATION New Richmond · PHYSICAL FORMAT All Physical Formats · BUDGET 25,000 · CALCULATE BASED ON FY ENDING 2016 |

RECALCULATE

Showing **1** to **10** of 10 entries   EMAIL / SCHEDULE   EXPORT

Collection	Selected Year's Circulations	% of Total Circulations	Avg Price per Copy	Suggested Budget	Override
Adult Fiction	61216	31.7273%	25.00	$8,939.79	☐
Adult Non-Fiction	22241	11.5272%	35.00	$4,547.21	☐
Adult Unspecified	23153	11.9999%	25.00	$3,381.19	☐
Juvenile Fiction	65801	34.1037%	15.00	$5,765.62	☐
Juvenile Non-Fiction	10557	5.4715%	20.00	$1,233.37	☐
Juvenile Unspecified	3841	1.9907%	15.00	$336.56	☐

Budget Projection by Subject uses SCAT tables

Popular Authors based on popularity of last title

Development - Selection

- Hold to Item Ratio Buying
  - ◆ Choose On order or Current holdings
  - ◆ Recommends purchases to satisfy demand
  - ◆ Limiting to one location takes only that library's items and holds into account
  - ◆ In all locations report, On order copies refers only to those on order by login accounting unit
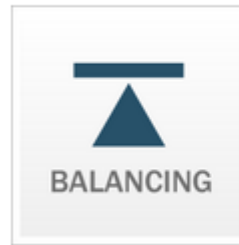
Hold to Item Ratio Buying

LOCATION All Locations • PHYSICAL FORMAT All Physical Formats • COLLECTION All Collections • HOLD-TO-ITEM RATIO GREATER THAN 5

First Item Created Before
04/06/2015

Purchase Amount
500

Showing **1** to **422** of **422** entries

EXPORT

Title	Author	ISBN	Call Number	First Item Created	Hold Queue	Item Count	On Order Copies	Price Per Copy	Hold to Item Ratio	Current Hold Wait Time	Copies to Buy	Projected Hold Wait Time	Extended Amount
Unbroken		025192223280	LUCKY DAY DVD UNB	3/24/15	519	19	0	14.99	27.3	364	85	53	$1,274.15
Into the woods / Disney presents ; a Lucamar		786936845884	791.43/72 23	3/19/15	476	38	0	22.46	12.5	166	58	53	$1,302.49
Interstellar / Paramount Pictures and Warner Bros. Pictures present ; in association with Legendary Pictures ; a Syncopy		032429209238	791.43/72 23	3/26/15	403	25	0	23.69	16.1	214	56	48	$1,326.64
The imitation game		013132622507	791.43/72 23	3/19/15	427	33	0	23.08	12.9	169	53	45	$1,223.16
Night at the museum : secret of the tomb / 20th Century Fox presents a 21 Laps		6315905854	jDVD NIGHT	2/27/15	397	29	0	19.17	13.7	186	51	68	$977.80
Birdman : or (the unexpected virtue of ignorance) / Fox Searchlight Pictures and Regency Enterprises present ; a New Regency/M Productions		024543954750	791.43/72 23	2/12/15	460	46	0	19.78	10.0	132	46	57	$909.79

- Hold to item ratio
- Current hold wait time
- Copies to buy
- Projected wait time after purchase
- Cost if recommended copies purchased

Balancing Reports

	COLLECTION USE	FLOATING MANAGEMENT	SHELVING ALLOCATION
BALANCING	Subject Use Subject Use By Location Collection Use Collection Use by Location	Drought Remedy Pooling Remedy	

- Collection Use
  - ◆ Subject Use by Location
    - All Locations report only
    - Useful when limiting by Format and Call Number Range
    - Recommends expanding or weeding by turnover rate
      - ◆ Can set desired rates for each

  - ◆ Floating Management
    - For those using Floating Collections (we do not)
      - ◆ Recommendations for redistribution of items

Maintenance Reports

WEEDING

Low Circulation Weeding
High Circulation Weeding
Age of Collection Weeding
Supply and Demand Weeding

CLEAN-UP

Missing Items

MAINTENANCE

- Weeding
  - ◆ Low Circulation Weeding
    - Limit to Location
    - Can also limit by format, collection, and call number range
    - Take out non-circulating collections!
  - ◆ Apply filters after report is run
    - Created before to eliminate new books
    - Last checkin date before to eliminate recently checked out items
    - List price less than if you don't want to weed expensive items
    - Don't weed last copy in Branch or System
    - Number to limit the number in the list
    - Shelf space bases on values in collections set-up

Created Before
04/06/2014

Last Checkin Date Before
04/06/2014

List Price Less Than
50

Don't Weed Last Copy In Branch

Don't Weed Last Copy In System

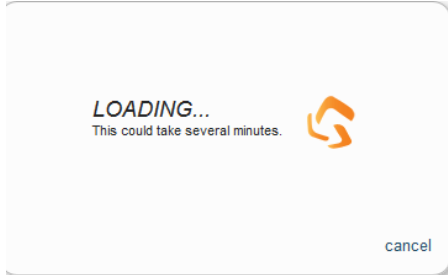Number
100

Shelf Space (in inches)
24

Low Circulation Weeding

EMAIL / SCHEDULE   EXPORT

#		Item Location	Call Number	Barcode	Title	Author	Total Circs	Circs Last 24 Months	Copies in Branch	Copies in System	Last Checkin Date	Created Date	Item Price	Item Status
1	☑	New Richmond Fiction	F CAR	30246002049354	Prom date	Carlson, Melody, author.	0	0	1	5		7/14/15	13	AVAILABLE
2	☑	New Richmond Paperbacks	PB ROL	30246002033069	Bloodline : a Sigma Force novel	Rollins, James, 1961- author.	0	0	1	1		2/3/15	10	AVAILABLE
3	☑	New Richmond Fiction	F OAT	30246001977365	Lovely, dark, deep : stories	Oates, Joyce Carol, 1938- author.	1	0	1	12	10/14/14	9/17/14	26	AVAILABLE
4	☑	New Richmond Paperbacks	PB CHA	30246001902637	Embrace the night	Chance, Karen.	1	0	1	5	10/7/14	1/22/13	8	AVAILABLE
5	☑	New Richmond Paperbacks	PB MIL	30246001949109	State secrets	Miller, Linda Lael.	1	0	1	3	8/27/15	1/21/14	5	AVAILABLE
6	☑	New Richmond Fiction	F SEN	30246002041633	Whispering shadows : a novel	Sendker, Jan-Philipp, author.	2	0	1	5	6/18/15	4/21/15	26	AVAILABLE
7	☑	New Richmond Fiction	F SCH	30246002043035	The Williston experience : a story of boomtown greed	Schmaltz, William H., author.	2	0	1	1	6/9/15	4/29/15	20	AVAILABLE
8	☑	New Richmond Fiction	F SIM	30246001995540	Ballroom : a novel	Simpson, Alice, author.	2	0	1	5	8/5/15	10/13/14	26	AVAILABLE

- See Total Circs, Copies in System, Created Date
- Can Export to a Review File

LOADING...
This could take several minutes.

cancel

Maintenance - Weeding

High Circulation Weeding

- See what is likely falling apart and needs replacement
- Limit to one location
- Choose number of circulations

LOCATION New Richmond · PHYSICAL FORMAT All Physical Formats · COLLECTION All Collections · CALL NUMBER RANGE All Call Number Ranges · TOTAL CHECKOUTS GREATER THAN 50

Showing **1** to **500** of 6602 entries EMAIL / SCHEDULE EXPORT

#	☑	Item Location	Call Number	Barcode	Title	Author	Total Circs	Circs Last 12 Months	Copies in Branch	Copies in System	Last Checkin Date	Created Date	Item Price	Item Status
1	☑	New Richmond Juv DVD	JDVD Rob	30246001403800	Robots		390	23	1	19	8/14/17	2/28/06	27	AVAILABLE
2	☑	New Richmond Juv DVD	JDVD Str	30246001366551	Strawberry Shortcake. Dress up days		390	6	1	9	8/10/17	11/2/05	15	AVAILABLE
3	☑	New Richmond Juv DVD	JDVD Str	30246001392607	Strawberry Shortcake. Meet Strawberry Shortcake		390	1	1	8	7/5/17	1/7/04	15	AVAILABLE
4	☑	New Richmond Juv DVD	JDVD MY	30246002008277	My little pony Crystal Princess. The runaway Rainbow		376	10	1	3	8/21/17	10/5/06	17	AVAILABLE
5	☑	New Richmond Juv DVD	JDVD SAN	30246002008251	The sandlot 2		372	19	1	9	9/28/17	5/24/05	20	AVAILABLE
6	☑	New Richmond Juv DVD	JDVD Hom	30246001390387	Homeward bound II : lost in San Francisco		370	10	1	6	9/18/17	12/4/02	20	AVAILABLE
7	☑	New Richmond DVD Fiction	DVD Sea	30246001387151	Seabiscuit / Universal Pictures/Dreamworks Pictures/Spyglass Entertainment present a Larger Than Life-Kennedy		370	11	1	18	9/30/17	12/29/03	27	AVAILABLE
8	☑	New Richmond Juv DVD	JDVD BAR	30246001946907	Barbie & the Diamond Castle		367	25	1	30	9/25/17	9/19/08	20	AVAILABLE

Maintenance – Clean up – Missing items

- Finds items too long on Holdshelf
  - ◆ Finds items on holdshelf with no item level hold
- Lost in transit
- Long overdue

- Limit to one location
- Designate timeframes
  - ◆ 999 to exclude

| LOCATION | New Richmond • | PHYSICAL FORMAT | All Physical Formats • | COLLECTION | All Collections • | WEEKS ON HOLDSHELF | 2 • | WEEKS IN TRANSIT | 2 • | MONTHS OVERDUE | 999 |

Number

1000

Showing 1 to 10 of 10 entries

EMAIL / SCHEDULE   EXPORT

Item Location	Call Number	Barcode	Title	Author	Last Action Date	Item Status	Flag
New Richmond Books on CD	BCD CRA	30246002171315	The promise	Crais, Robert, author.	9/12/17	IN TRANSIT	Transit
New Richmond Juv Music CDs	MCD ZM REAL YWF	30246001984874	A year with Frog and Toad : original cast recording	Reale, Robert.	8/29/17	IN TRANSIT	Transit
New Richmond Music CDs	MCD MA Nigh Ima	30246001834483	Imaginaerum	Nightwish (Musical group)	9/10/17	IN TRANSIT	Transit
New Richmond Music CDs	MCD MC MCGR TBH	30246002066432	35 biggest hits	McGraw, Tim, performer, composer.	9/21/17	ON HOLDSHELF	Hold Shelf
New Richmond Music CDs	MCD MC Twai Gh	30246001660383	Greatest hits	Twain, Shania.	9/10/17	IN TRANSIT	Transit

Schedule!

EMAIL / SCHEDULE

- Fairly recent addition
- Have the report sent to you on a regular basis
- Once you decide what you want, you don't have to go through the steps again

SCHEDULE AND EMAIL REPORT

Report Name: Missing_Items_Oct_05_2017_02_27_32

Email Addresses:

Separate multiple addresses by comma

Formats:
- ○ Adobe PDF (pdf)
- ○ Review File (bspool)
- ◉ Microsoft Excel (xls)

Frequency:
- ○ Daily
- ○ Weekly
- ◉ Monthly
- ○ Send Immediately
- ○ Particular Date
- ○ Never

Start Date: 10/05/2017

Depending on your server settings, the Start Date may be adjusted to the following day.
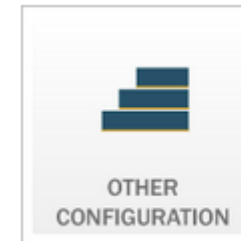
Already Scheduled Reports:

Daily: 0

Weekly: 0

Monthly: 0

Particular Date: 0

Never: 0

Note: Click here to check already scheduled reports.

OK   Cancel

Scheduled Reports

- Can view scheduled reports at any time
- Choose Stop to unschedule the report
- Schedule to start it again after stopping
- Run now to do just that
- Delete to delete the report
- To change frequency, click the Schedule type

OTHER CONFIGURATION

Realign Scats
Exclude Item Status
Show/Hide Reports
Scheduled Reports

Name	Report Name	Output Format	Schedule Type	Start Date	Next Run	Scheduled By	Users	Scheduled	Actions
Missing_Items	Missing Items	Microsoft Excel	Monthly	10/01/2017	11/01/2017	phwear	jhartmann@phillipspl.org, rebeccas@phillipspl.org, jessicawear@phillipspl.org, vfraundorf@phillipspl.org, sfreiboth@phillipspl.org, johick@phillipspl.org	Yes	Stop Schedule Run Now Delete
Low_Circulation_Weeding	Low Circulation Weeding	Microsoft Excel	Monthly	09/04/2017	11/04/2017	phwear	jessicawear@phillipspl.org	Yes	Stop Schedule Run Now Delete
Missing_Items_Jul_12_2017_10_37_10	Missing Items	Microsoft Excel	Weekly	07/12/2017	07/25/2017	osamiller	amiller@osceolapubliclibrary.org	Yes	Stop Schedule Run Now Delete

Conclusions

User friendly – Click and Go

Best way to learn is to use it – click and see what you get!

Remember, you can't hurt anything

Big advantage is totally custom dates

Schedule option very useful

Questions?

Thank you!

Kathy Setter
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