

Collection Analysis and Action Tool (CAT)

Jay Peters



 #IUG2019



Sunday, May 5th | Pre-Conference

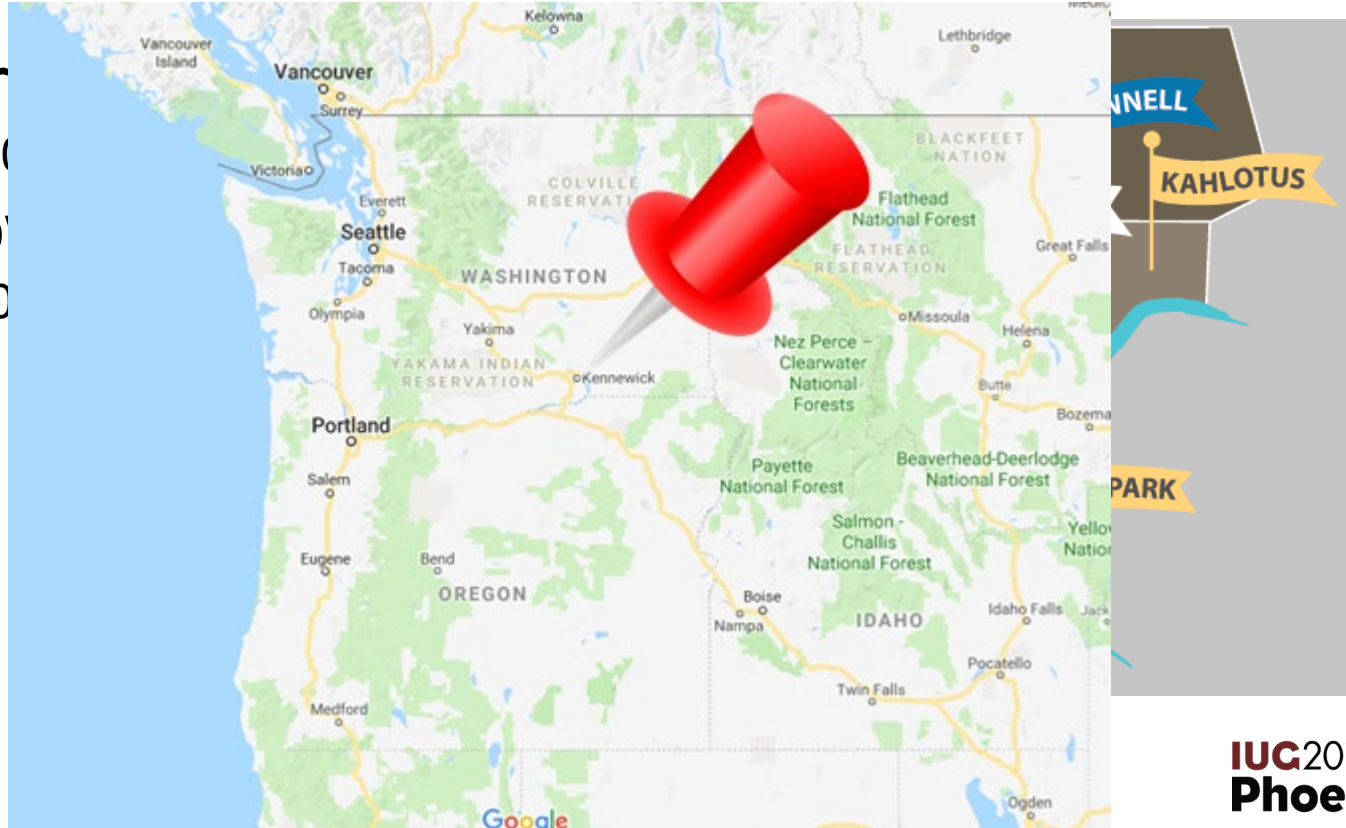
Monday, May 6th – Wednesday, May 8th | Main Conference

Outline

- Introduction and context
- Current Limitations
- CAT
- Outcomes
- Future directions

Context

- 13 br
– 2,00
- 10 to
– 180



Limitations of:

1. Current collection management tool
2. Load balancing
3. Manual processes

1. Current Tool

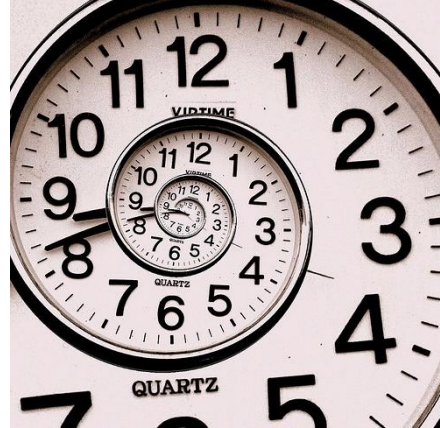
- No suggestions based on copyright date
- Limited historical data
- Branch based weeding recommendations

2. Load Balancing

- December 2016:
 - Title/material type limit → collection limit
- Duplicate titles bounced where not needed

3. Manual Processes

- Items selected and placed on hold manually
- Receiving branch manually cancels hold



Addressing Limitations: CAT

1. What is CAT?
2. Collection Management
3. Load Balancing
4. Manual Movement

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What is CAT?

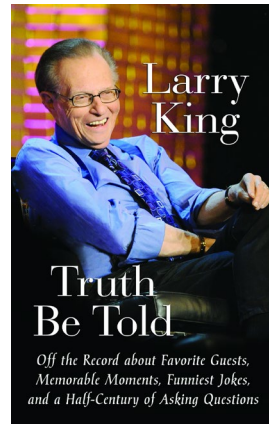
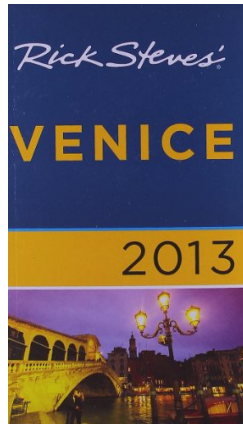


What is CAT?

- Stats
- Action tools
- Custom parameters

Collection Management

- Historical data
- Suggestions based on copyright date
- District based recommendations



Load Balancing

- Extra copies addressed
- Pull order customizable by collection
- Track circulation of items moved



Automatic Movement

- Record set
- Holds
- Email

Let's Take a Look

Statistics

Circ

Historical

Collection

Reports

Dewey

District

Movement

Item

Transfer
List

Schedule



Haggard
CREW
Dead on Arrival
Circulated Last 3 Weeks
No Circulation

Historical Stats

ANF CREW Eligible

	4/3/2019		3/18/2019		2/19/2019		1/22/2019		12/26/2018		11/26/2018		10/29/2018		10/2/2018		9/4/2018	
Basin City	103	30.29%	101	29.79%	101	29.11%	100	28.74%	79	23.51%	79	22.90%	79	22.83%	74	22.84%	75	23.22%
Benton City	686	41.45%	687	41.59%	684	41.71%	675	41.44%	606	34.06%	601	34.21%	588	34.29%	601	35.42%	609	35.91%
Bookmobile	76	35.02%	78	35.78%	76	35.35%	77	34.68%	54	24.66%	57	25.33%	56	26.54%	54	25.71%	52	24.64%
Connell	218	31.46%	218	31.14%	208	30.45%	212	31.50%	177	26.03%	183	25.14%	182	25.21%	185	26.06%	192	26.97%
Kahlotus	68	36.76%	71	37.77%	72	36.92%	72	38.30%	50	27.03%	52	28.57%	50	28.41%	54	30.00%	53	29.78%
Keewaydin	1,437	40.69%	1,439	41.15%	1,446	40.85%	1,424	41.23%	1,120	32.62%	1,235	35.62%	1,257	36.17%	1,266	36.72%	1,295	37.35%
Kennewick	9,248	42.10%	9,278	42.38%	9,292	43.10%	9,493	43.82%	7,961	36.21%	8,209	37.41%	8,326	38.30%	8,390	38.89%	8,713	39.74%
Merrills Corner	79	29.59%	80	29.30%	81	29.35%	76	28.90%	58	22.39%	56	21.37%	58	22.31%	61	22.93%	60	23.72%
Othello	1,208	40.16%	1,209	39.99%	1,220	40.73%	1,226	41.10%	963	32.87%	1,085	36.06%	1,082	36.27%	1,090	36.61%	1,084	37.41%
Pasco (D)	1,706	37.93%	1,694	38.16%	1,678	38.50%	1,652	38.76%	1,443	34.15%	1,563	35.56%	1,550	35.81%	1,563	36.54%	1,574	36.43%
Pasco (W)	557	27.10%	581	27.79%	611	28.89%	604	29.15%	427	21.04%	441	21.26%	444	21.42%	432	21.44%	471	22.66%
Prosser	747	36.98%	744	37.37%	755	37.62%	754	37.55%	592	30.48%	623	30.81%	602	30.60%	592	30.98%	565	31.67%
West Richland	646	26.08%	686	26.51%	717	26.62%	740	26.47%	719	25.29%	1,311	29.78%	1,308	29.79%	1,306	30.36%	1,329	31.40%
District	16,779	39.09%	16,866	39.31%	16,941	39.73%	17,105	40.18%	14,249	33.25%	15,495	34.56%	15,582	35.10%	15,668	35.69%	16,072	36.45%



SortBy:

Desc. Dewey Circ Items Unique T.O. % L3W Life Circ C/M % 1Yr. % 2 Yrs. % CREW New CREW Price CpC % D.O.A. % 0 Circ Mo. Dead # +/- % +/-

Asc. Dewey Circ Items Unique T.O. % L3W Life Circ C/M % 1Yr. % 2 Yrs. % CREW New CREW Price CpC % D.O.A. % 0 Circ Mo. Dead # +/- % +/-

	YTD	Unique		% Circ	Avg.	Circs /	% Added	% Added	% CREW	New	Average	Cost	% No	Avg Mo.	Items	%		
	Circ	Items	Titles	Turnover	L3W	Life Circ	Month	Last Year	Last 2 Years	Eligible	Crew	Price	per Circ	% D.O.A.	Circ	Dead	Needed	Change
158	1,447	882	479	1.60	32.54%	15.40	0.45	31.29%	54.65%	14.63%	0	\$12.83	\$0.85	4.21%	5.0%	4.84	259	29%
641.5	1,381	1,351	755	1.02	19.76%	18.55	0.41	17.76%	33.09%	45.30%	0	\$15.96	\$0.86	8.63%	1.9%	8.43	156	12%
973 - 979	1,125	1,798	1,367	0.62	11.35%	14.62	0.20	13.35%	24.69%	31.54%	2	\$16.43	\$1.13	12.35%	3.2%	11.95	303	-17%
240 - 249	1,063	954	668	1.09	19.71%	16.76	0.34	23.17%	38.47%	26.00%	0	\$11.25	\$0.68	13.29%	6.1%	7.35	76	8%
635	957	937	585	1.02	33.83%	19.95	0.33	16.12%	29.56%	21.02%	0	\$14.44	\$0.73	15.00%	2.9%	7.32	10	-1%
646 - 648	857	736	493	1.16	28.94%	20.23	0.39	16.71%	29.48%	54.21%	13	\$12.94	\$0.64	11.71%	3.3%	7.50	254	35%
741.5973	849	421	169	1.90	44.42%	17.10	0.60	10.93%	62.00%	0.00%	0	\$10.66	\$0.63	2.45%	0.2%	3.32	333	79%
300 - 319	822	1,270	1,026	0.64	13.62%	12.81	0.24	18.82%	33.86%	49.84%	3	\$14.38	\$1.13	16.29%	5.6%	10.44	152	-12%
641.5638	782	404	135	1.91	33.42%	18.78	0.69	20.05%	64.60%	21.04%	0	\$15.60	\$0.84	2.26%	2.5%	3.88	225	56%
641	732	1,162	795	0.63	12.65%	16.88	0.32	9.38%	20.57%	56.02%	3	\$14.73	\$0.87	7.94%	2.8%	11.10	48	-4%
641.59	641	901	606	0.71	13.10%	16.97	0.34	13.32%	26.19%	51.05%	0	\$17.85	\$1.06	9.15%	1.8%	10.67	10	1%
745	604	748	547	0.80	17.25%	20.22	0.30	9.22%	17.11%	2.54%	0	\$12.80	\$0.64	7.02%	1.5%	8.08	7	-1%
332.024	577	383	174	1.49	31.59%	15.03	0.44	32.38%	51.70%	61.36%	3	\$13.50	\$0.90	3.80%	5.5%	4.37	74	19%
360 - 363	548	766	597	0.71	15.54%	13.60	0.24	16.58%	29.77%	54.31%	1	\$14.66	\$1.08	11.97%	4.4%	10.74	78	-10%
641.587	531	286	53	1.85	31.47%	10.25	0.66	37.06%	85.31%	3.50%	3	\$12.93	\$1.27	5.59%	4.9%	2.97	104	36%
649	522	482	306	1.06	24.69%	17.61	0.27	13.49%	29.46%	70.33%	0	\$11.27	\$0.65	15.91%	4.1%	8.06	19	-4%
364 - 365	505	596	446	0.83	14.93%	17.26	0.27	12.92%	28.52%	62.75%	0	\$15.09	\$0.88	7.63%	2.5%	9.17	18	-3%
790 - 792	499	866	621	0.58	11.66%	15.04	0.26	11.09%	20.32%	14.43%	3	\$16.46	\$1.10	10.23%	1.6%	12.07	67	-8%
641.5636	486	454	259	1.06	19.38%	20.14	0.46	12.11%	36.12%	44.71%	1	\$14.99	\$0.74	3.88%	1.3%	7.06	88	19%
940	464	625	468	0.74	14.56%	17.67	0.24	8.32%	15.84%	37.60%	0	\$15.86	\$0.90	14.89%	1.4%	9.78	61	-10%

Collection

ANF

JNF

SP ANF

SP JNF

Pub Year

2019 2018

2017 2016

2015 2014

2013 2012

2011 2010

2009 2008

Years Available



Item Movement

Collection

ANF

JNF

SP ANF

SP JNF

Call Number

158

641.5

973 - 979

240 - 249

635

646 - 648

741.5973

300 - 319

All Copies		Push Items (Title)		Pull Items (Title)	
Basin City	0	Basin City	0	Basin City	0
Benton City	0	Benton City	0	Benton City	1
Bookmobile	0	Bookmobile	0	Bookmobile	0
Connell	0	Connell	0	Connell	1
Kahlotus	0	Kahlotus	0	Keewaydin	1
Keewaydin	6	Keewaydin	4	Kennewick	5
Kennewick	62	Kennewick	17	Merrills Corner	1
Merrills Corner	0	Merrills Corner	0	Othello	1
Othello	2	Othello	8	Pasco (D)	10
Pasco (D)	2	Pasco (D)	6	Pasco (W)	5
Pasco (W)	0	Pasco (W)	1	Prosser	0
Prosser	17	Prosser	1	West Richland	13
West Richland	0	West Richland	1	District	38
District	89	District	38		

Open Load Balancing

Close Load Balancing

Push Items (Dewey)		Pull Items (Dewey)	
Basin City	95	Basin City	33
Benton City	218	Benton City	145

DrillDown Example

Call Number	Title	Barcode	#	YTD C.	All Circ.	Last Circ.	Status Cng.	Available	Circ Status	Assigned:	
ANF 741.5973 CHAST	Can't we talk about something more pleasant?	60911001387104	2014	5	4	15	3/27/19	4/1/19	3/2/15	In	Prosser
ANF 635.962 NOLAN	Raised bed revolution : build it, fill it, plant it	60911001907752	2016	4	1	28	3/20/19	4/1/19	5/12/16	In	Othello
ANF 362.175 GAWANDE	Being mortal : medicine and what matters in th	60911001238539	2014	5	2	45	3/17/19	3/22/19	10/10/14	In	Kennewick
ANF 641.5954 MUNDHE	The essential Indian instant pot cookbook : au	60911002850779	2018	5	3	6	3/6/19	3/7/19	10/18/18	In	Othello
ANF 613.2 HARTWIG	It starts with food : [discover the Whole30 and	60911001388698	2014	9	3	54	2/24/19	3/1/19	3/3/15	In	Kennewick
ANF 641.587 MANNING	Instant Pot miracle 6 ingredients or less : 100	60911002846850	2018	8	3	6	2/21/19	3/29/19	10/18/18	In	Keewaydin
ANF 641.587 MORANTE	The essential Instant Pot cookbook : foolproof	60911002591209	2017	15	3	10	2/17/19	2/26/19	2/27/18	In	Othello
ANF 613.26 FUNG	The complete guide to fasting : heal your body	60911002124902	2016	8	3	36	2/12/19	3/25/19	11/4/16	In	Kennewick
ANF 979.751 NOWHERE	Nowhere to remember : Hanford, White Bluffs,	60911002839343	2018	3	3	7	2/11/19	3/7/19	10/15/18	In	West Richland
ANF 179.9 SASAKI	Goodbye, things : the new Japanese minimalis	30911014239679	2017	3	2	14	1/29/19	2/25/19	4/17/17	In	Kennewick

Show Dead

--> Either

Relative Dead

Show D.O.A.

Show Haggard

Show <= 2 Circs

Show Duplicates

Show CREW

Show Last Copies

Omit Last Copies

Show All Items

Add to Transfer

Create Record Set

Email Sheet

**Pasco (D) - Pull
Items**

[Return to Report](#)

Auto Hold

Email Example

Call Number	Title	Call Number	Title	Barcode	Assigned:	Available:	Circ Status	Assigned:	
ANF 741.5973 CHAST	Can't we t	ANF 179.9 SASAKI	Goodbye, things : the new Japanese minimalis	30911014239679	2017	Kennewick	3/2/15	In	Prosser
ANF 635.962 NOLAN	Raised be	ANF 362.175 GAWANDE	Being mortal : medicine and what matters in th	60911001238539	2014	Kennewick	5/12/16	In	Othello
ANF 362.175 GAWANDE	Being mor	ANF 613.2 HARTWIG	It starts with food : [discover the Whole30 and	60911001388698	2014	Kennewick	10/10/14	In	Kennewick
ANF 641.5954 MUNDHE	The essen	ANF 613.26 FUNG	The complete guide to fasting : heal your body	60911002124902	2016	Kennewick	10/18/18	In	Othello
ANF 613.2 HARTWIG	It starts w	ANF 635.962 NOLAN	Raised bed revolution : build it, fill it, plant it.	60911001907752	2016	Othello	3/3/15	In	Kennewick
ANF 641.587 MANNING	Instant Pc	ANF 641.587 MANNING	Instant Pot miracle 6 ingredients or less : 100	60911002846850	2018	Keewaydin	10/18/18	In	Keewaydin
ANF 641.587 MORANTE	The essen	ANF 641.587 MORANTE	The essential Instant Pot cookbook : foolproof	60911002591209	2017	Othello	2/27/18	In	Othello
ANF 613.26 FUNG	The compl	ANF 641.5954 MUNDHE	The essential Indian instant pot cookbook : au	60911002850779	2018	Othello	11/4/16	In	Kennewick
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ANF 179.9 SASAKI	Goodbye,	ANF 979.751 NOWHERE	Nowhere to remember : Hanford, White Bluffs,	60911002839343	2018	West Richland	4/17/17	In	Kennewick

Outcomes

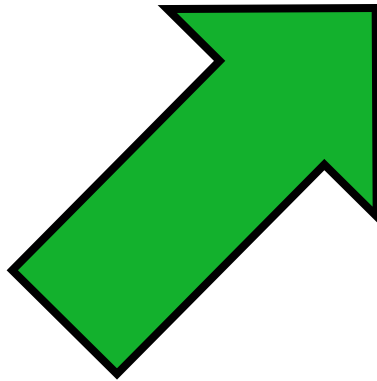
1. Pilot data from nonfiction
2. User perceptions

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Pilot Data

- Between November 2017 and March 2019:
- 4,863 items moved
- 23.94% increase in circulation



User Perceptions

- Easy to use
- More responsive to collections
- Withdrawn items = new copies
- Cost Saving



Future Directions

1. What's next?
2. Improvements
3. Tying it all together

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What's Next?

- Cancel current collection management tool
- Launch CAT summer 2019
- Catch up on title transfers
- On demand weeding

Improvements

- Create schedule
- More refined formulas
- Automated record set for transfers
- Historical data graphs
- Report for branches
- And more...

Tying it all together

- Off shelf tools not addressing our needs
- CAT
- Outcomes
- Future directions

Questions?

Jay Peters

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mid-columbia
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Call Number	Title	Barcode	#	1st Circ.	All Circ.	Last Circ.	Status	Clg.	Available	Circ Status	Assigned
ANF 741.5973 CHAST	Can't we talk about something more pleasant?	60911001387104	2014	5	4	15	3/27/19	4/1/19	3/2/15	In	Prosser
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ANF 179.9 SASAKI	Goodbye, things : the new Japanese minimalis	30911014239679	2017	3	2	14	1/29/19	2/25/19	4/17/17	In	Kennewick

YTD Turnover	2.70	Avg. Life Circ	22.10
Percent Out	0.0%	Least Haggard 1/4	6.33
Circs/Month	0.82	Most Haggard 1/4	45.00
Count Dead	0	Avg. Age (mos.)	26.9
Percent Dead	0.0%	Newest 1/4 Age	5.5
Relative Dead	1	Z-Score	1.00
Count Haggard	2	Oldest 1/4 Age	50.7
Percent Haggard	20.0%	Dead on Arrival	0
Item Count	10	Unique Titles	10
CREW Count:	2	CREW Percent	20.0%
Dead Def:	18	Haggard Def:	40
Average Price:	\$15.48	Price per Circ:	\$0.70

Pasco (D) - Pull Items