CHICAGO PUBLIC LIBRARY

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Polaris Reporting for ~~Staff~~ Location Accountability
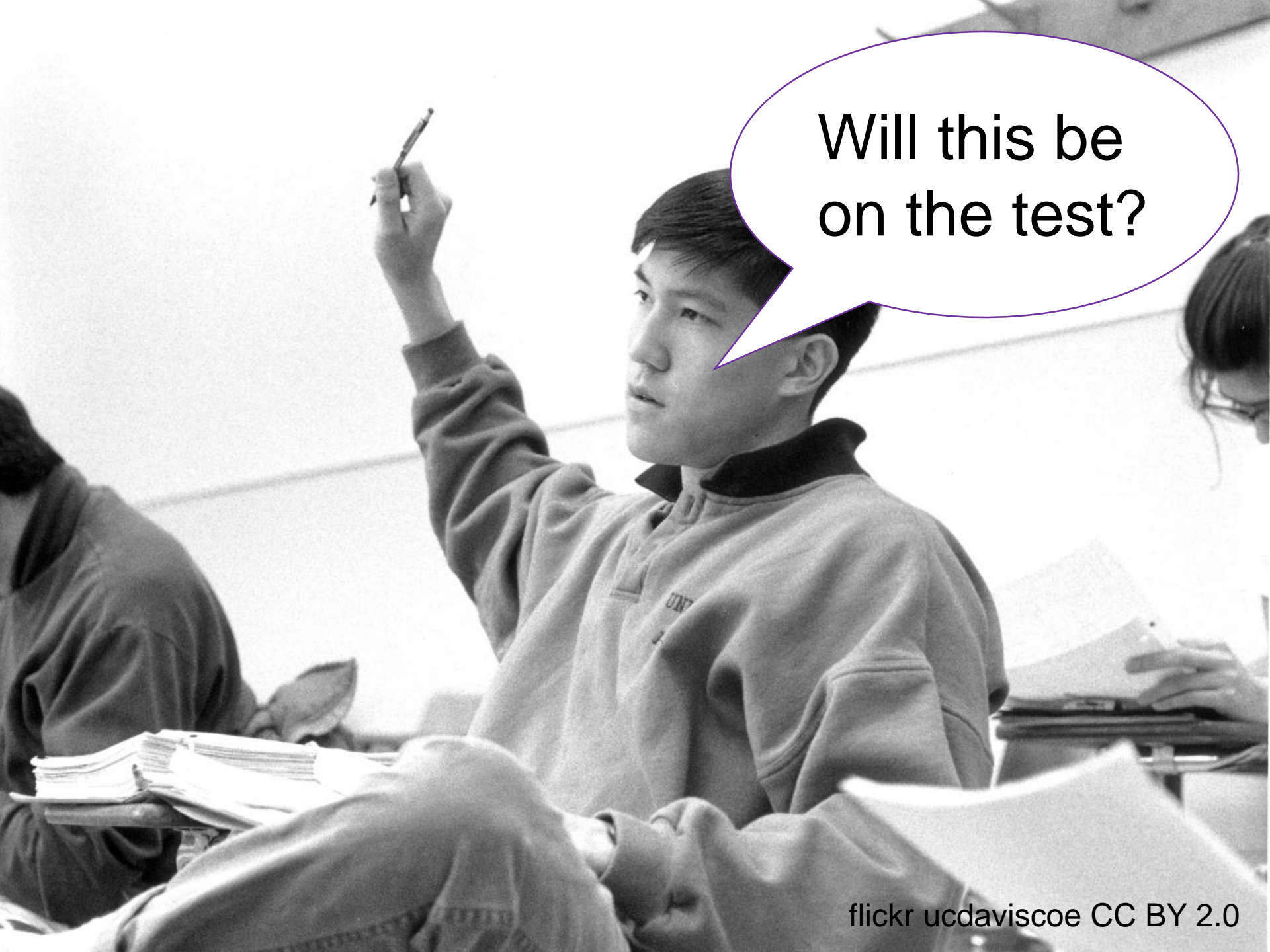
Paul Keith

pkeith@chipublib.org

Are CPL locations…

- checking in new material in a timely manner?

- searching for all items on their picklist (pending hold requests) daily ?

- searching for missing, claimed, and "lost in transit" material monthly?

Restroom Cleanliness Form

Instructions: Post each form on the back of the appropriate restroom door. Input the week ending date on each form. Inspect, clean and restock the restrooms a minimum of every 60 minutes. Input the time of the inspection and your initials.

☐ Women's Room			☐ Men's Room			Week Ending _____	

Mon.		Tues.		Wed.		Thur.		Fri.		Sat.		Sun.	
Time	Initials	Time	Initials	Time	Initials	Time	Initials	Time	Initials	Time	Initials	Time	Initials

81 locations

Are CPL locations…

- checking in new material in a timely manner?

- searching for all items on their picklist (pending hold requests) daily ?

- searching for missing, claimed, and "lost in transit" material monthly?
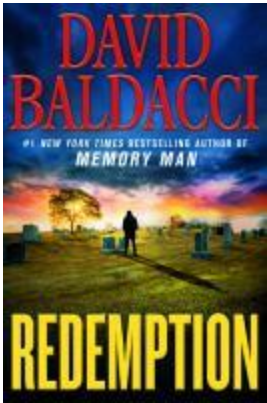
Will this be on the test?

flickr ucdaviscoe CC BY 2.0

ILS Reporting @ CPL

- Handled exclusively by City's IT Department prior to Migration to Polaris in April 2017.

- Handled mainly by Library's Technology Department after migration.

Are locations checking in new (shelf ready) material in a timely manner?

Issue: Lost Circulations

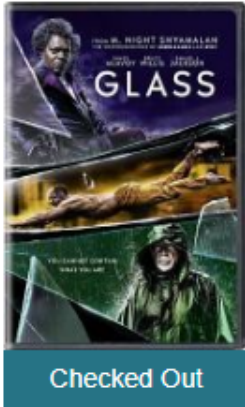

.33 * 82 = 27.33

27.33 / 5 = 5.47

Trapping Preference

- prefer first in queue
- prefer holds at assigned branch
- prefer holds at return branch

Can we measure this?

Item Record ⓘ

SAVE   **ACTIONS ▾**   **LINKS ▾**   ⟳   ⬆   **CLOSE**

Glass

Barcode: **R0335855611**

Call number: **FICTION**

Collection: **Adult DVDs**

Shelf location: **None**

Owning branch: **Chicago Public Library**

☐ ILL   ☐ Non-circulating

Record status: **Final**

Bib control number: **2108024**

Parent item:

Assigned branch: **Thurgood Marshall**

☐ eContent   ☑ Display in PAC

Issue:

Issue control number:

Price: **$22.49**

Circulation status: **Checked Out ‖ 4/25/2019 5:22:58 PM**

Checked Out

✎ Details   ◯ Circulation   ⚏ Controls   💬 Blocks and Notes   ⟲ History   📊 Statistics   📦 Record Sets   More ▾

DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS
4/25/2019 5:22:58 PM	Thurgood Marshall	Hold Shelf -> Checked Out	Checked out	Thurgood Marshall	
4/18/2019 3:33:42 PM	Thurgood Marshall	Hold Shelf	At Thurgood Marshall (THRMAR)	Thurgood Marshall	
4/18/2019 3:33:42 PM	Thurgood Marshall	On Order -> Hold Shelf	Modified via Receive Shipment	Thurgood Marshall	
4/17/2019 9:04:08 AM	Thurgood Marshall	On Order	Modified via Cataloging	TCI	
3/7/2019 11:45:19 AM	Thurgood Marshall	On Order	Created via Acquisitions PO Line Item processing	Acquisitions	

DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION
4/25/2019 5:22:58 PM	Thurgood Marshall	Hold Shelf -> Checked Out	Checked out	Thurgood Marshall
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4/18/2019 3:33:42 PM	Thurgood Marshall	On Order -> Hold Shelf	Modified via Receive Shipment	Thurgood Marshall
4/17/2019 9:04:08 AM	Thurgood Marshall	On Order	Modified via Cataloging	TCI
3/7/2019 11:45:19 AM	Thurgood Marshall	On Order	Created via Acquisitions PO Line Item processing	Acquisitions

1/15/2019 5:08:37 PM	Woodson Regional	On Order -> Transferred for Hold	Modified via Receive Shipment	Woodson Regional
1/15/2019 10:06:19 AM	Woodson Regional	On Order	Modified via Cataloging	TCI
1/15/2019 10:04:47 AM	Woodson Regional	On Order	Modified via Cataloging	TCI
11/19/2018 3:34:04 PM	Woodson Regional	On Order	Created via Acquisitions PO Line Item processing	Acquisitions

```sql
select cir.barcode as "Item Barcode",
case when o1.name = 'TCI' then 'Adult Book Discussion' else o1.name end as "Branch",
br.BrowseTitle as Title,
c.name as Collection,
mt.description as "Media",
u.name as "Staff Member",
format(h1.transactiondate,'MMMM') + ' ' + format(h1.transactiondate,'yyyy') as "Month",
h1.transactiondate as "Added to Polaris",
h2.transactiondate as "Checked In by Branch",
datediff(day,h1.transactiondate,h2.transactiondate) as "Days"
from polaris.polaris.itemrecordhistory h1
inner join polaris.polaris.itemrecordhistory h2
on h1.itemrecordid = h2.itemrecordid
inner join polaris.polaris.polarisusers u (nolock)
on h2.PolarisUserID = u.PolarisUserID
left outer join polaris.polaris.circitemrecords cir (nolock)
on h1.itemrecordid = cir.ItemRecordID
left outer join polaris.polaris.materialtypes mt (nolock)
on cir.MaterialTypeID = mt.materialtypeid
inner join polaris.polaris.organizations o1 (nolock)
on cir.HomeBranchID = o1.organizationid
left outer join polaris.polaris.collections c (nolock)
on cir.assignedcollectionid = c.CollectionID
inner join polaris.polaris.bibliographicrecords br (nolock)
on cir.AssociatedBibRecordID = br.BibliographicRecordID
where h1.ActionTakenID = 9
and h1.organizationid = 85
and h2.actiontakenid = 46
and h1.transactiondate < h2.TransactionDate
and h1.transactiondate between '2018-09-01' and '2019-03-01'
and h2.transactiondate between '2018-09-01' and '2019-04-01'
```

Item Barcode	Branch	Title	Collection	Media	Staff Member	Month	Added to Pol	Checked In by	Days
R0453237202	Albany Park	Sacred smokes : stories	Adult	Trade Paperback	stest	Oct-18	10/2/2018	10/3/2018	1
R0453237210	Albany Park	Lowriders blast from the past	Elementary	Trade Paperback	stest	Oct-18	10/2/2018	10/3/2018	1
R0453237228	Albany Park	Young water protectors : a story a	Elementary	Trade Paperback	stest	Oct-18	10/2/2018	10/3/2018	1
R0335751003	Albany Park	Shab	Adult DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0335749690	Albany Park	Nature cat. Winter dance party	Early Childhood DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0335748351	Albany Park	Scooby-Doo! and the haunted hou	Elementary DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0335746888	Albany Park	Sicario : day of the soldado	Adult DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0335745573	Albany Park	The first purge	Adult DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0335748759	Albany Park	The cat in the hat knows a lot abo	Early Childhood DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0335750536	Albany Park	Peppa Pig. Stars.	Early Childhood DVDs	DVD	stest	Oct-18	10/2/2018	10/3/2018	1
R0453197169	Albany Park	A dastardly plot	Elementary	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453234822	Albany Park	The fabulous Bouvier sisters : the	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197046	Albany Park	Naomis too	Elementary	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453235917	Albany Park	The apprentice : Trump, Russia ar	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197258	Albany Park	Muse of nightmares	Teen	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197224	Albany Park	A spark of light : a novel	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197274	Albany Park	On desperate ground : the Marine	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197185	Albany Park	The hollow of fear	Adult	Trade Paperback	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197177	Albany Park	The Kennedy debutante	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453238371	Albany Park	Winners take all : the elite charad	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197151	Albany Park	Turning pages : my life story	Early Childhood	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453238397	Albany Park	Pasando páginas : la historia de m	Early Childhood	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453242906	Albany Park	The best American short stories 2	Adult	Trade Paperback	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197054	Albany Park	The attack of the grizzlies, 1967	Elementary	Mass Market Paperback	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197290	Albany Park	Dracul	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197266	Albany Park	A map of days	Teen	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197135	Albany Park	Go show the world : a celebration	Early Childhood	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197096	Albany Park	I am a baby	Board Books	Board Book	stest	Oct-18	10/3/2018	10/16/2018	13
R0453240920	Albany Park	All kinds of people	Board Books	Board Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197038	Albany Park	The eleventh trade	Elementary	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197193	Albany Park	The dead ringer	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453243627	Albany Park	On a sunbeam	Teen	Trade Paperback	stest	Oct-18	10/3/2018	10/3/2018	0
R0453239254	Albany Park	2019 current medical diagnosis &	Adult Reference	Trade Paperback	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197282	Albany Park	The fifth risk	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197240	Albany Park	Grim lovelies	Teen	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453238389	Albany Park	Who? : a celebration of babies	Board Books	Board Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197232	Albany Park	Dry	Teen	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197208	Albany Park	An easy death	Adult	Hardcover Book	stest	Oct-18	10/3/2018	10/3/2018	0
R0453197070	Albany Park	Daphne definitely doesn't do dran	Elementary	Mass Market Paperback	stest	Oct-18	10/3/2018	10/3/2018	
R0453238410	Albany Park	Good and mad : the revolutionary	Adult	Hardcover Book	stest	-18	10/3/2018	10/3/2018	

Media	(All)						
Average of Days	**Column Labels**						
Row Labels	**Sep-18**	**Oct-18**	**Nov-18**	**Dec-18**	**Jan-19**	**Feb-19**	**Grand Total**
Northtown	141.57	108.09	88.00	5.00	15.24	0.39	123.47
Little Italy	109.60	92.04	56.31	35.07	4.27	2.48	98.28
Independence	122.46	94.35	57.94	30.37	8.84	1.46	66.51
Whitney M. Young Jr.	79.75	54.39	18.79	2.15	1.34	0.57	34.98
West Loop	62.40	22.74	24.05	9.07	0.28	0.72	23.18
Chicago Bee (Closed)	40.53	18.06	1.82	1.32	2.65	2.42	11.18
Coleman	3.44	5.65	22.38	3.69	5.06	3.01	8.01
Harold Washington Library Center	6.00	8.43	8.31	8.76	7.85	9.15	7.92
Douglass (Closed)	8.00	14.70	3.67	4.78	5.67	10.11	7.61
West Pullman	4.75	5.69	8.88	18.61	7.21	3.84	7.23
Lincoln Belmont	6.87	3.23	5.15	3.91	6.50	6.29	5.36
Blackstone	8.10	6.39	4.50	4.49	4.35	3.06	5.33
South Shore (Closed)	7.11	5.53	3.73	4.32	3.09	1.65	4.90
Rogers Park	5.01	3.98	4.56	5.75	4.34	2.51	4.35
West Town	2.56	5.03	5.70	21.89	3.09	3.17	4.25
Avalon	5.71	3.48	3.86	8.72	3.43	0.78	4.24
Budlong Woods	3.49	6.63	1.50	2.88	2.87	4.72	4.05
Sulzer Regional	2.40	2.44	4.38	5.77	3.96	5.98	3.88
Lincoln Park	4.21	4.82	4.25	3.99	1.21	1.53	3.58
Adult Book Discussion	2.56	1.97	9.11	13.00	2.36	4.06	3.56
Edgebrook	7.04	4.20	1.06	2.25	1.82	1.69	3.41

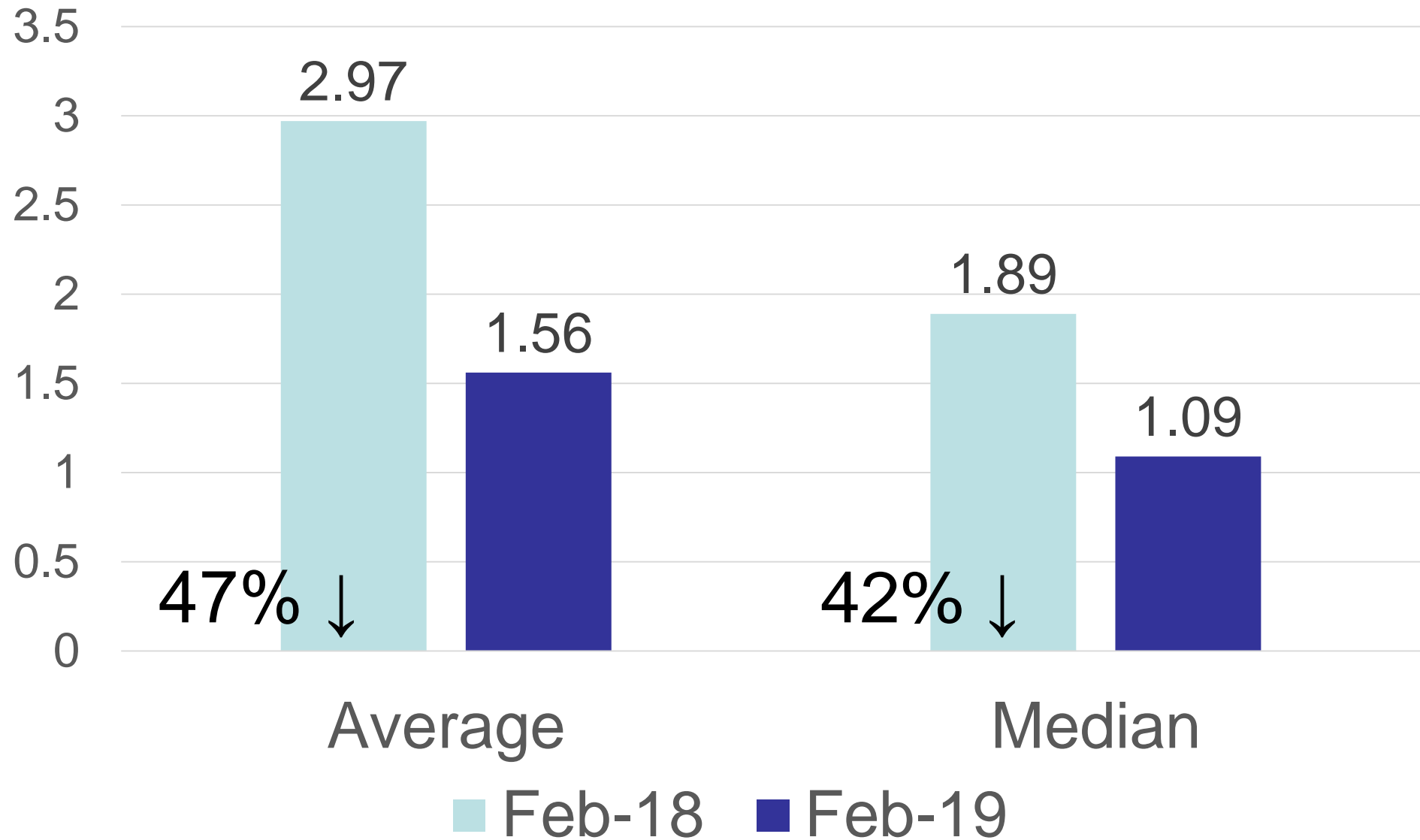| 61 | Legler | 1.19 | 0.91 | 2.08 | 1.34 | 1.48 | 1.23 | 1.27 |
62	South Chicago	1.69	0.67	1.50	1.79	1.36	1.09	1.25
63	Beverly	1.44	0.53	2.39	1.96	1.61	0.58	1.23
64	West Lawn	1.32	1.11	2.36	0.88	0.98	0.76	1.22
65	Mayfair	1.26	1.32	1.24	1.99	0.51	0.50	1.18
66	Canaryville	0.51	1.87	1.31	0.94	1.09	1.20	1.16
67	Water Works	1.01	0.31	2.49	1.36	1.74	0.11	1.16
68	Pullman	0.73	0.44	0.72	1.20	2.22	0.59	1.16
69	Brainerd	0.76	0.34	0.52	1.22	5.43	0.50	1.12
70	Portage-Cragin	1.54	0.83	0.50	2.05	0.66	0.47	1.12
71	King	1.06	0.58	1.18	2.00	0.78	1.06	1.08
72	Jefferson Park (Closed)	1.59	0.54	0.71	0.94	1.63	2.40	1.06
73	Bucktown-Wicker Park	1.70	0.59	1.48	1.09	0.68	0.96	1.05
74	Woodson Regional	1.06	1.31	1.68	0.63	0.66	0.52	0.99
75	Hall	0.41	0.65	0.56	2.07	1.17	0.70	0.95
76	Hegewisch	0.27	1.80	0.42	0.83	0.96	0.31	0.89
77	Vodak-East Side	0.96	0.76	1.10	1.23	0.75	0.48	0.87
78	Humboldt Park	1.10	1.15	0.48	1.38	0.45	0.42	0.84
79	Oriole Park	0.64	0.72	0.89	1.90	0.91	0.13	0.82
80	Altgeld	0.42	0.83	1.48	0.81	0.83	0.68	0.80
81	Thurgood Marshall	0.19	0.82	1.42	1.05	0.78	0.66	0.79
82	Austin-Irving	0.36	0.85	1.36	1.75	0.54	0.41	0.78
83	Wrightwood-Ashburn	0.31	1.06	0.88	1.44	0.42	0.40	0.76
84	Walker	0.37	0.50	0.93	0.79	1.61	0.39	0.72
85	Albany Park	0.73	0.56	0.35	0.87	0.69	0.13	0.56
86	North Pulaski	0.87	0.63	0.50	0.60	0.27	0.19	0.52

Getting people to look at the report.

- Calling outliers.
- Emailing district chiefs about outliers.
- Meet with district chiefs.
- Include district chiefs on monthly reports.
- Meet with branch managers.
- Include outliers on monthly reports.
- Include all branch managers on monthly reports.

03

Using data to regularly review and improve programs, services and operations to better serve patrons. Examples include:

- Using data surrounding Library content to understand how to best use our collections.
- Developing a dashboard to track metrics and learn how to improve our programming.
- Analyzing patron data to understand emerging patron needs and better meet those needs.

Days to Check in Shelf Ready Material

3.5

3

2.5

2

1.5

1

0.5

0

2.97

1.56

1.89

1.09

47% ↓

42% ↓

Average

Median

Feb-18 ■ Feb-19

Are locations searching for items on their picklist daily?

CHICAGO PUBLIC LIBRARY

DATE	STATUS	BARCODE	BRANCH
5/3/2019 10:51:46 AM	Held	R0117518748	Sulzer Regional
4/30/2019 4:04:04 PM	Shipped	R0117518748	Sulzer Regional
4/29/2019 10:06:16 AM	Shipped	R0117518748	Sulzer Regional
4/29/2019 9:17:05 AM	Located	R0442849672	Harold Washington Library Center
4/29/2019 5:03:36 AM	Pending	R0442849672	Harold Washington Library Center
4/27/2019 5:02:26 AM	Pending	R0442012330	Toman
4/26/2019 5:02:33 AM	Pending	R0443056086	Chinatown
4/24/2019 4:43:34 PM	Pending	R0447221081	Chicago Bee
4/24/2019 4:43:34 PM	Active		

Sorter

Sulzer's copy checked in at Albany Park.

Can we measure this?

CHICAGO
PUBLIC
LIBRARY

Identifying what happens to pending items

- look for holds that become pending (6010) between
  - 4 pm day before
  - 7 am day of

Identifying what happens to pending items

- what next happens to them?
  - between 4 pm the day before and 5:30 am the day after
  - nothing (no transaction) or Polaris (userid = 1) moves to another picklist
  - something happens to hold at picklist branch/item marked missing or ask me later
  - something happens to hold elsewhere

```sql
declare @reportdate datetime = dateadd(day,1,dateadd(MINUTE,330,convert(datetime,convert(date,@date))))

declare @transactionheaders table
(
    TransactionID int,
    OrganizationID int,
    WorkstationID int,
    PolarisUserID int,
    TransactionDate datetime,
    TransactionTypeID int,
    TranClientDate datetime
)

insert into @transactionheaders (TransactionID, OrganizationID, WorkstationID, PolarisUserID,
TransactionDate, TransactionTypeID, TranClientDate)
select TransactionID, OrganizationID, WorkstationID, PolarisUserID, TransactionDate,
TransactionTypeID, TranClientDate
from polaristransactions.polaris.transactionheaders th with (nolock)
where th.TransactionTypeID in (6001, 6006, 6009, 6010, 6011, 6012, 6013, 6039, 6051,
6052, 6053, 6054, 6057)
and th.transactiondate between dateadd(day,-2,@reportdate) and @reportdate

declare @transactiondetails table
(
    TransactionID int,
    TransactionSubTypeID int,
    numValue int,
    dateValue datetime
)

insert into @transactiondetails (TransactionID, TransactionSubTypeID, numValue, dateValue)
select TransactionID, TransactionSubTypeID, numValue, dateValue
from polaristransactions.polaris.transactiondetails td with (nolock)
where td.TransactionID in (select transactionid from @transactionheaders)

declare @holdtransactions table
(
    Branch varchar(50),
    ItemsCurrentStatus int,
```

Picklist Report for 4/27/2019

Branch	Not Actioned	Actioned Locally	Actioned at Other Location
Harold Washington Library Center	77	191	39
Sulzer Regional	29	35	13
Woodson Regional	27	8	11
Lincoln Belmont	8	15	11
Toman	8	0	4
Albany Park	3	24	3
Bucktown-Wicker Park	3	19	4
Rogers Park	3	18	6
Blackstone	2	7	9
Dunning	2	10	0
Independence	2	16	3
Lincoln Park	2	10	12
Lozano	2	0	2
West Loop	2	11	0
Avalon	1	9	3
Budlong	1	8	2

Picklist Report for 4/27/2019

Branch	Not Actioned	Actioned Locally	Actioned at Other Location
Harold Washington Library Center	77	191	39
Sulzer Regional	29	35	13
Woodson Regional	27	8	11
Lincoln Belmont	8	15	11
Toman	8	0	4
Albany Park	3	24	3
Bucktown-Wicker Park	3	19	4
Rogers Park	3	18	6
Blackstone	2	7	9
Dunning	2	10	0
Independence	2	16	3
Lincoln Park	2	10	12
Lozano	2	0	2
West Loop	2	11	0
Avalon	1	9	3
Budlong	1	8	2

April 2019

51 – no
53 – partial

	Friday 2/1/2019	Saturday 2/2/2019	Monday 2/4/2109	Tuesday 2/5/2019	Wednesday 2/6/2019	Thursday 2/7/2019	Friday 2/8/2019	Saturday 2/9/2019	Monday 2/11/2019	Wednesday 2/13/2019	Thursday 2/14/2019	Friday 2/15/2019	S
Albany Park													
Altgeld													
Archer Heights			no										
Austin									partial				
Austin-Irving													
Avalon													
Back of the Yards													
Beverly													
Bezazian													
Blackstone						no							
Brainerd				no						no	no		
Brighton Park													
Bucktown-Wicker Park										partial			n
Budlong Woods													
Canaryville					no								
Chicago Bee													
Chicago Lawn													
Chinatown													
Clearing													
Coleman								no					
Daley Richard J.-Bridgeport						no			no				
Daley Richard M.-W Humboldt													
Douglass													
Dunning													
Edgebrook													
Edgewater													
Gage Park													
Galewood-Mont Clare													
Garfield Ridge		no											
Greater Grand Crossing			no					no				no	
Hall				no									
Harold Washington Library Center													
Hegewisch											no		
Humboldt Park		no									partial		p
Independence (Closed)													
Jefferson Park													
Jeffery Manor													
Kelly							no				no		
King							no						
Legler		no	partial				no			partial	partial	no	n
Lincoln Belmont				no									
Lincoln Park													
Little Village													

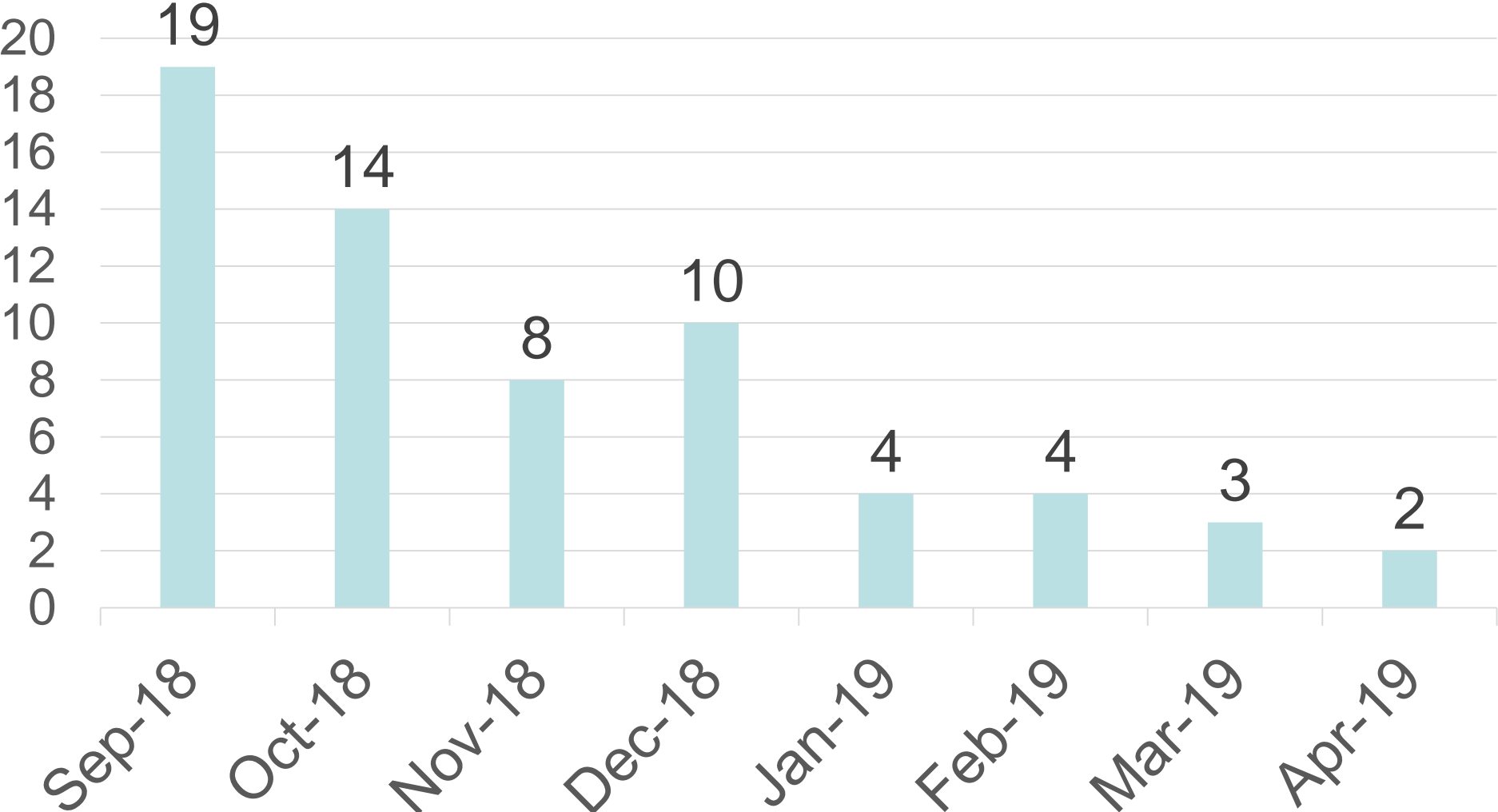|	ReportDate	Branch	Outcome
54	2019-04-01	43	partial
55	2019-04-01	47	no
56	2019-04-01	48	partial
57	2019-04-02	22	partial
58	2019-04-02	42	partial
59	2019-04-02	48	no

polaris.dbo.picklistsummary

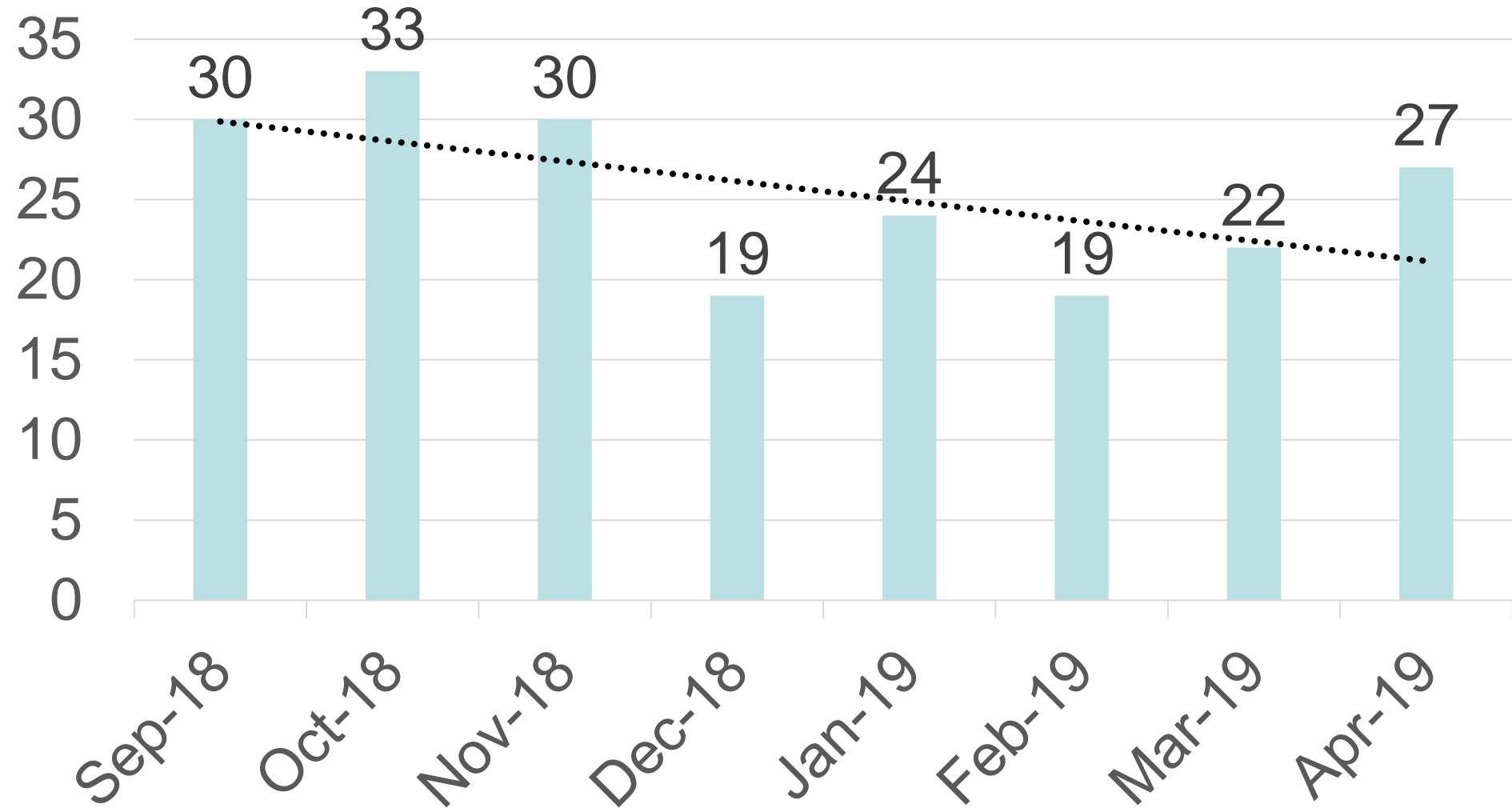## Days Neighborhood Services Locations Did Less Than Half Their Picklist - April 2019

Location	Didn't Do	Did Less Than Half	Total Days	% of Open Days
Austin	8	1	9	35%
Legler	2	5	7	27%
Woodson Regional		5	5	19%
West Lawn	4	1	5	19%
Brainerd	5		5	19%
Coleman	1	4	5	19%
Thurgood Marshall		4	4	15%
West Chicago Avenue	2	2	4	15%
Toman	2	2	4	15%
Chicago Bee		4	4	15%
Bucktown-Wicker Park	1	3	4	15%
Wrightwood-Ashburn	1	3	4	15%
Humboldt Park	1	3	4	15%
Avalon	1	3	4	15%
Clearing	1	2	3	12%
Back of the Yards	1	2	3	12%
Gage Park	2	1	3	12%
West Pullman	2		2	8%

Getting people to look at the report.

Number of Locations Doing
Less Than Half Their Picklist at
Least 25% of the Time

Month	Value
Sep-18	19
Oct-18	14
Nov-18	8
Dec-18	10
Jan-19	4
Feb-19	4
Mar-19	3
Apr-19	2

Number of Locations Doing Less Than Half Their Picklist at Least 2 Days in the Month

Are locations searching for missing, claimed, and "lost in transit" material monthly?

DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION
4/27/2019 2:43:49 PM	Uptown	In Transit -> Checked Out	Checked out	Coleman
11/15/2018 6:15:40 PM	Uptown	In Transit	Modified via Cataloging	Uptown
6/25/2018 2:48:41 PM	Uptown	Checked Out -> In Transit	To Uptown (UPTOWN)	Coleman

Collection Maintenance Reports

- missing, claimed, in transit more than 30 days

- how to indicate that location has looked for the item if not found?

- introduced February 2018

- reminder July 2018

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FOLDERS (3)

| 📄 Collection Maintenance Reports for Branches and Regionals ••• | 📄 ILL ••• | 📄 Yesterday's Daily Receipts (For Email Subscriptions, ••• |

PAGINATED REPORTS (5)

| 📊 Daily Receipts ••• | 📊 Daily Receipts (Multi-Day, ••• | 📊 Daily Receipts Computer Commons ••• |
| 📊 Daily Receipts HWLC No YOUmedia or Computer Commons ••• | 📊 Floating Limits ••• | |

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PAGINATED REPORTS (3)

📊 Claimed Items •••	📊 Items In Transit More Than 30 Days •••	📊 Missing Items •••

RESOURCES (2)

📄 Collection Maintenance Report Instructions.pdf •••	📄 Subscribing to Collection Maintenance Reports.pdf •••

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Location | Bezazian (BZAZIN) ▾ | View Report

|◀ ◀ [1] of 1 ▶ ▶| ↻ ⊖ 100% ▾ 💾▾ 🖨

Items in Transit More Than 30 Days - Bezazian (BZAZIN)
Be sure to add your location's abbreviation (BZAZIN) to the non-public note of any item you are unable to find.

Title	Author	Call Number	Collection	Shelf Location	Material Type	Barcode	Placed in transit	Sent From
Brownies and broomsticks	Cates, Bailey.	FICTION	Adult		Hardcover/Trade Paperback	R0426141284	3/19/2019	Bezazian
Victoire : my mother's mother	Condé, Maryse.	FICTION	Adult		Hardcover/Trade Paperback	R0424322185	3/5/2019	Bezazian
Do androids dream of electric sheep?	Dick, Philip K.	FICTION	Adult		Hardcover/Trade Paperback	R0452613691	3/29/2019	West Pullman
The silent corner : a novel of suspense	Koontz, Dean R. (Dean Ray), 1945- author.	FICTION	Adult		Hardcover/Trade Paperback	R0448622206	3/27/2019	Edgewater

Can we measure this?

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Report on Collection Maintenance Reports

- "When Locations Last Did Their Collection Maintenance Lists"

- date last worked on or "Never"

  – date = item record history entry

- number of items on with list active holds

- first distributed in early April 2019

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Branch/Regional	Date Claimed List Last Worked On	Items Currently on Claimed List	Unlooked for Claimed Items with Holds	
Albany Park	Never	267	2	
Altgeld	Never	137	2	
Archer Heights	4/8/2019	0	0	
Austin	7/24/2018	22	1	
Austin-Irving	1/9/2018	177	5	
Avalon	Never	464	2	
Back of the Yards	Never	128	1	
Beverly	11/3/2018	32	0	
Bezazian	4/2/2019	8	2	
Blackstone	Never	340	7	
Brainerd	Never	168	0	
Brighton Park	4/2/2019	2	0	
Bucktown-Wicker Park	4/10/2019	388	8	
Budlong Woods	4/15/2019	205	1	
Canaryville	1/15/2019	110	2	
Chicago Bee	Never	112	0	

Surprises/Learnings

- People don't follow instructions.
  - Don't add their branch abbreviation to items not found. (Added these to report in April.)
  - Add a made up branch abbreviation.
    - SHERMA <> SHP
- Small branches (3) with more than 1000 items lost in transit.

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Getting people to look at the report.

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Impact

- collection maintenance reports – oops!
- "When Locations Last Did…"
  - little change from April 1 to May 1
  - conversations!

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Next Steps

- main library
- automate more of the process

Using These Reports Yourself

- Number of Days Before Items are Received…
  - must use the Check In Shelf Ready Materials dialog in EDI services
  - change cataloging branch and you're likely good to go (CPL's is 85)

Using These Reports Yourself

- Picklist Report
- Picklist Report for Subscription by Email
  - alter first line if running at a time other than 5:30 am
- stored procedure to populate "picklist summary" table
  - assumes table already exists (polaris.dbo.picklistsummary)
  - Report Date (date), Branch (int), Outcome (varchar(max))

Using These Reports Yourself

- Collection Maintenance Reports
  - case statements in select statement
  - code to sort LC call numbers
  - ItemStatusDate > some date
  - add branch abbreviation to non public note
- When Locations Last Did Their Collection Maintenance Reports
  - some CPL specific stuff throughout

Lessons Learned

- The data in your ILS can often "measure" problems that you only know about anecdotally.

- Expect surprises in the data.

- People care about what you measure.

- Beware of shifting goals.

Questions?

Slides and SQL/RDL files:

https://www.chipublib.org/iug2019

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Paul Keith

pkeith@chipublib.org