Using Alma Analytics to Facilitate the Library Weeding Project

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Introduction

- The consolidation of Horace W. Sturgis Library and Lawrence V. Johnson Library was completed in 2015, but the libraries' physical collections have not been integrated
- KSU library Collection Development Department started systematic weeding project in 2017

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Weeding project

Primary concerns:

- Age of the collection
- Irrelevance to the curriculum
- Item usage/lack of use
- Duplications among different campuses

Data for the project -- Criteria

The Collection Development Department would like to have the data to review books published before 2008 that have not been checked out in the past 3 years, for the purpose of weeding

Purpose of the Presentation

We would like to demonstrate

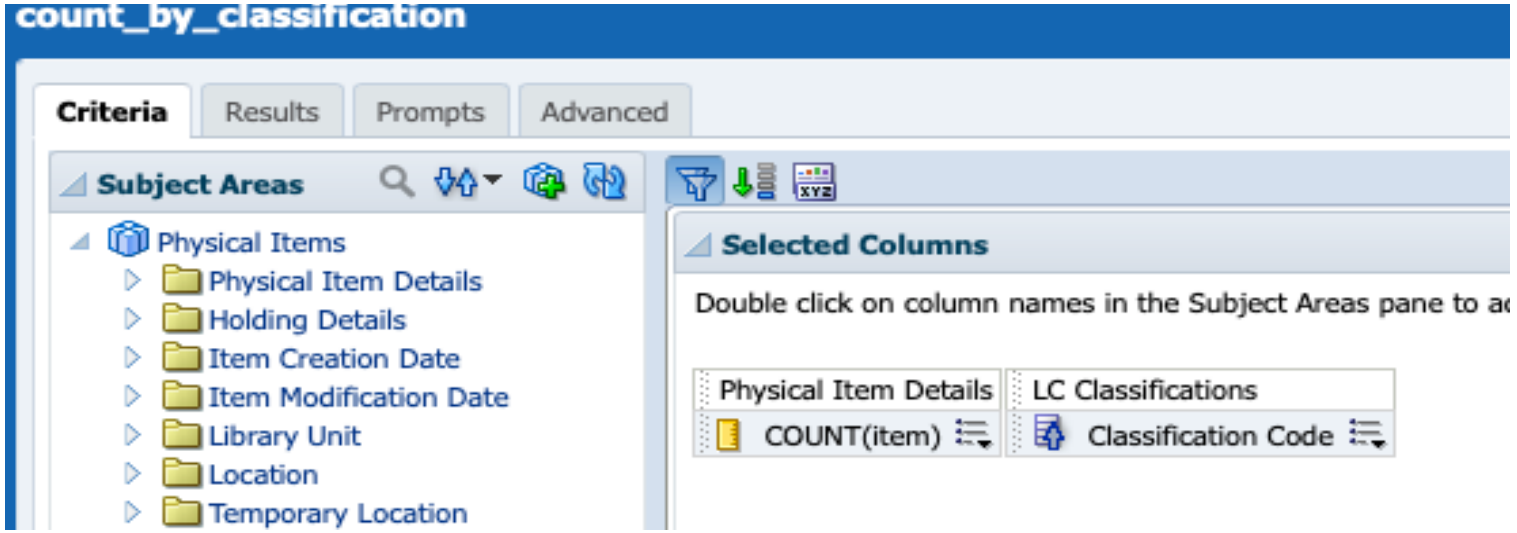
- ✓ How many reports we created
- ✓ What Criteria we used
- ✓ How we did the reports
- ✓ The problems we encountered
- ✓ How we solved our problems
- ✓ Remaining issues for further investigation

Overview of Reports created

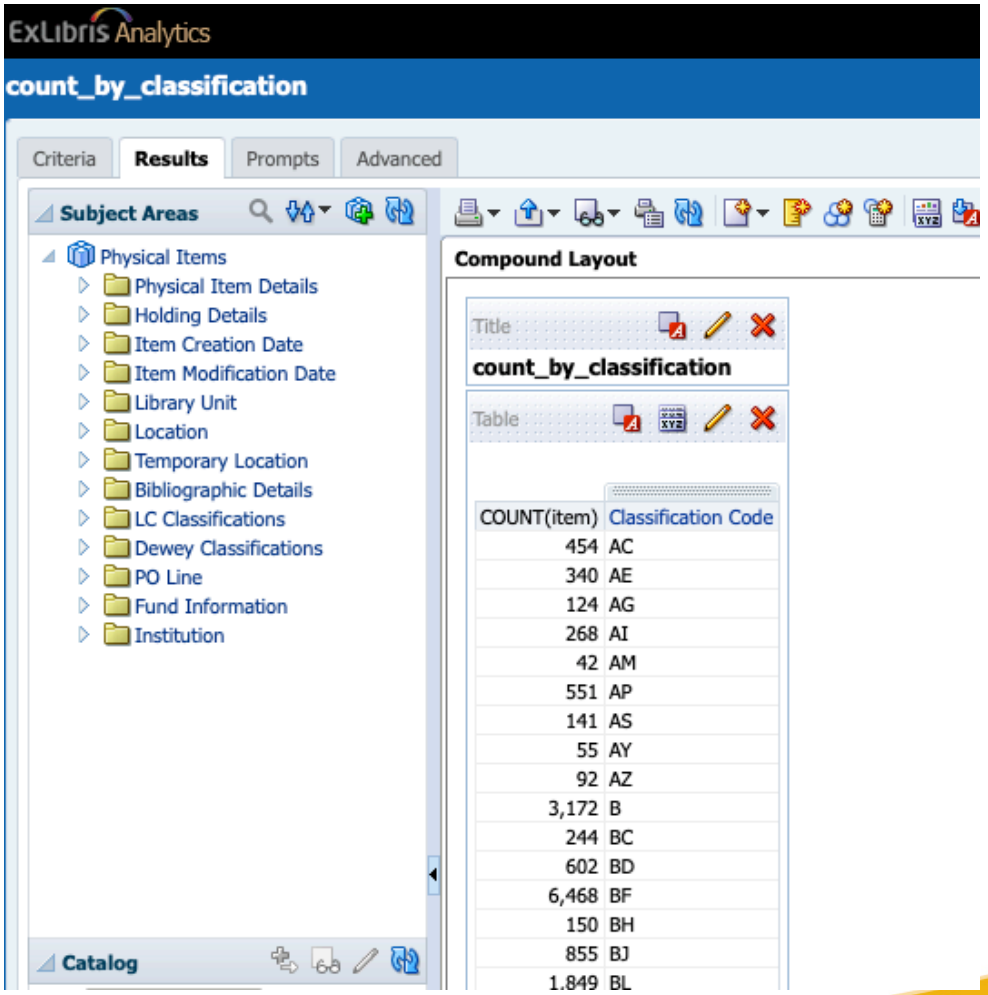
1. Count number of items in each classification
2. Shelflist published including 2008 and before with classification code
3. Shelflist published including 2008 and before with call number
4. Shelflist published after 2008 with classification code
5. Shelflist published after 2008 with call number
6. Books checked out before 2008
7. Shelflist before 2008 excluding checkouts
8. E-book and physical inventory comparison

Item Count Report

1. Count number of items in each classification
   - count function (barcode)
   - Classification code



Item Count Report --Result



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Shelflist reports

After discussion with the collection librarian, we decided to use following fields:

- Title
- Author
- Barcode
- Publisher
- Location Name
- Year of Publication (*)
- Lifecyle (*)
- Processing Type (*)
- Call Number (*)/ Classification code
- Edition (*)
- Volume (*)

Important elements

- *Lifecycle* is equal to / is in Active
  (without this, queries will contain deleted items)
- *Process Type* is equal to None
  (to filter out loan, lost and missing books etc)
- Call number vs classification code

Important elements

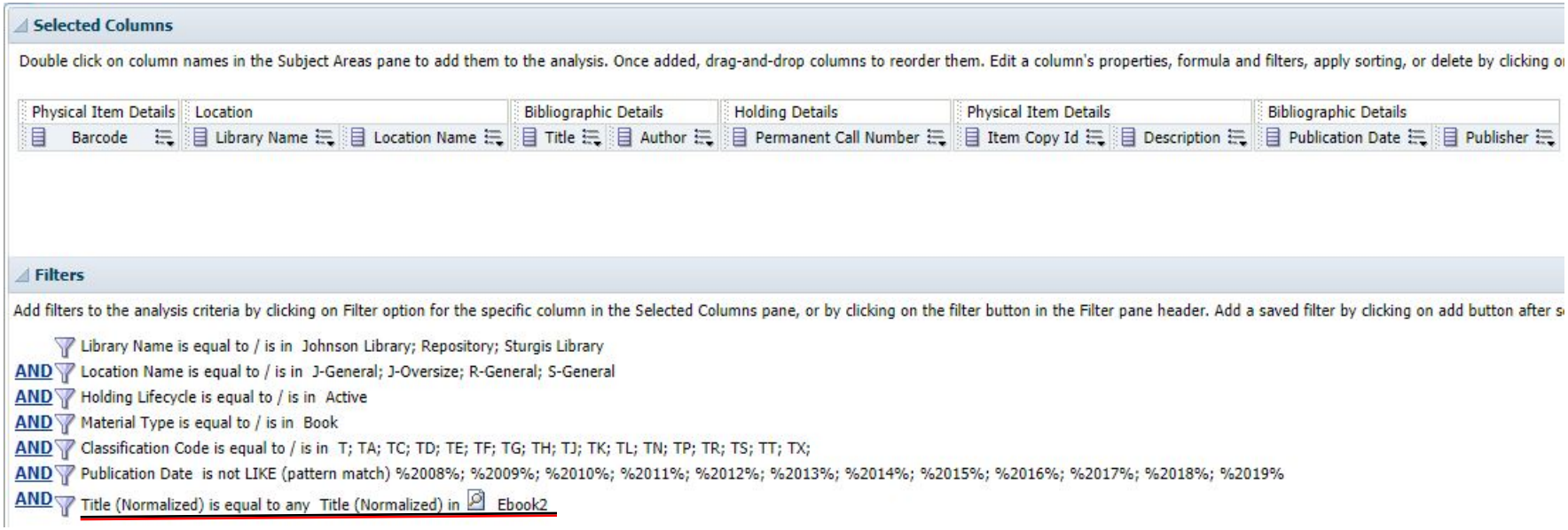
We realized there were records that had the same title and needed to differentiate them
So we added

- Edition
- Volume

E-books and Physical Inventory Comparison

- Only needed purchased e-books. E-books available through subscription were not considered
- If books were available as an e-book and a physical item, the physical book could be considered for weeding
- Report 1 created as a Funds Expenditure report to only show e-books that were purchased
- Report 2 compared Report 1 against the shelf list of books published before 2008

Example – E-books comparison



Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking o

Physical Item Details	Location		Bibliographic Details		Holding Details	Physical Item Details		Bibliographic Details	
Barcode	Library Name	Location Name	Title	Author	Permanent Call Number	Item Copy Id	Description	Publication Date	Publisher

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after s

Library Name is equal to / is in Johnson Library; Repository; Sturgis Library
AND Location Name is equal to / is in J-General; J-Oversize; R-General; S-General
AND Holding Lifecycle is equal to / is in Active
AND Material Type is equal to / is in Book
AND Classification Code is equal to / is in T; TA; TC; TD; TE; TF; TG; TH; TJ; TK; TL; TN; TP; TR; TS; TT; TX;
AND Publication Date is not LIKE (pattern match) %2008%; %2009%; %2010%; %2011%; %2012%; %2013%; %2014%; %2015%; %2016%; %2017%; %2018%; %2019%
AND Title (Normalized) is equal to any Title (Normalized) in Ebook2

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Challenge one

Year of Publication format:

2008	[2008 printing]	2007 [i.e. 2008]	[2008]-
c2008	©1982-©2008.	2008 [i.e. 2007]	a2008.
[2008]	2008-[2012]	[2010], c2008.	c2000-c2008.
[c2008]	Copyright 2008	[2008]-	C2008.;
©2008.	c [2008]	[©2008], ℗1993.	c2008-

Challenge one – cont2.

Because characters were alphanumeric and there was a lack of standard format, we could not simply use less than/greater than as a filter

Challenge one – solution

We used wildcard character with ”IS LIKE” and “Is NOT LIKE” operator

% = multiple characters (*)
_ = single character

Filter out
%2008%; %2009%; %2010%; %2011%; %2012%; %2013%; %2014%; %2015%; %2016%; %2017%; %2018%; %2019%;

Challenge Two

Call Number:

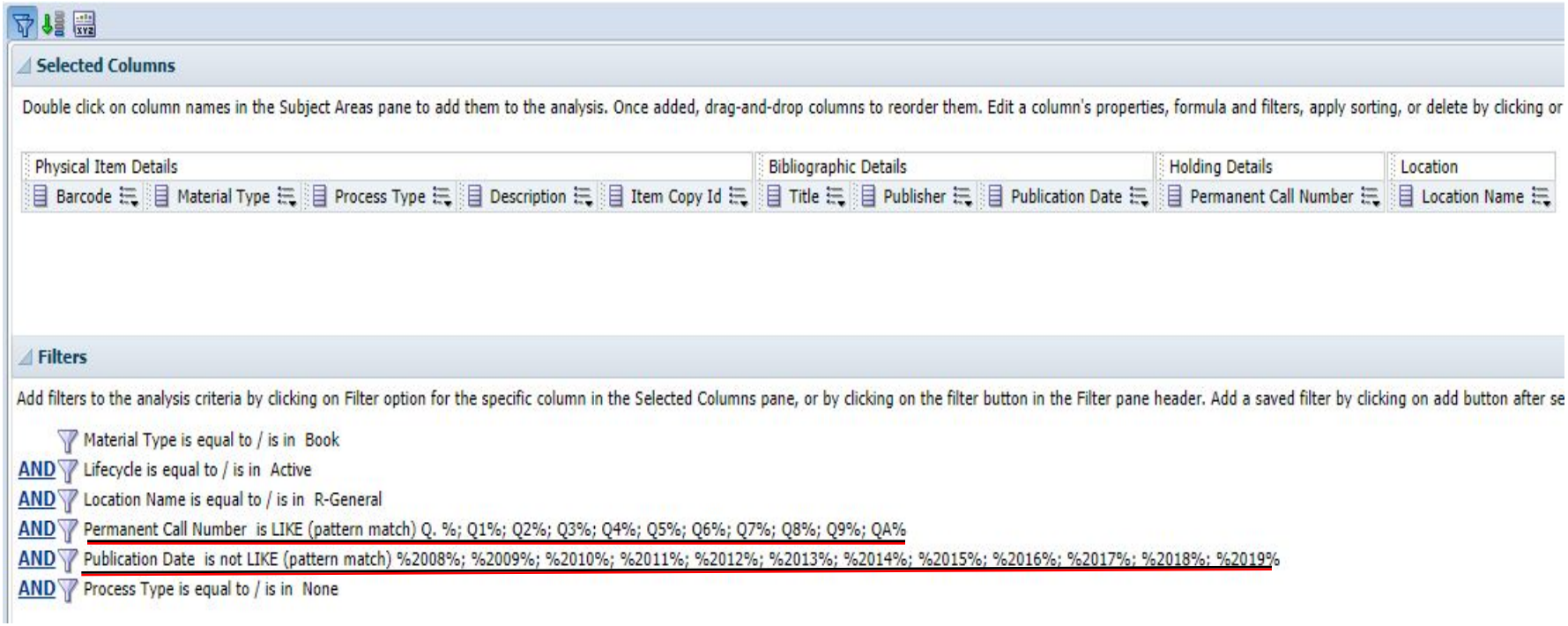
- Classification Code (LC Classifications)
- Permanent Call Number (Holding Details)
  - Wildcard need to be used
  - Example for Q and QA

  Q1%;Q2%;Q3%...Q9%

  QA%

  We avoid using Q% on this case, QC-QX call number will not be included

Example: Shelf list report



Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or

Physical Item Details					Bibliographic Details			Holding Details	Location
Barcode	Material Type	Process Type	Description	Item Copy Id	Title	Publisher	Publication Date	Permanent Call Number	Location Name

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after se

Material Type is equal to / is in Book
AND Lifecycle is equal to / is in Active
AND Location Name is equal to / is in R-General
AND Permanent Call Number is LIKE (pattern match) Q. %; Q1%; Q2%; Q3%; Q4%; Q5%; Q6%; Q7%; Q8%; Q9%; QA%
AND Publication Date is not LIKE (pattern match) %2008%; %2009%; %2010%; %2011%; %2012%; %2013%; %2014%; %2015%; %2016%; %2017%; %2018%; %2019%
AND Process Type is equal to / is in None

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Challenge Three

We needed checkout data from 2016 to current. We migrated to Alma in May 2017, and according to Alma to Voyager Migration Guide:

> "Active loan transactions are migrated from Voyager to Alma.
>
> Historical circulation activity in the form of counts (e.g. historical charges, last loan date, etc.)"

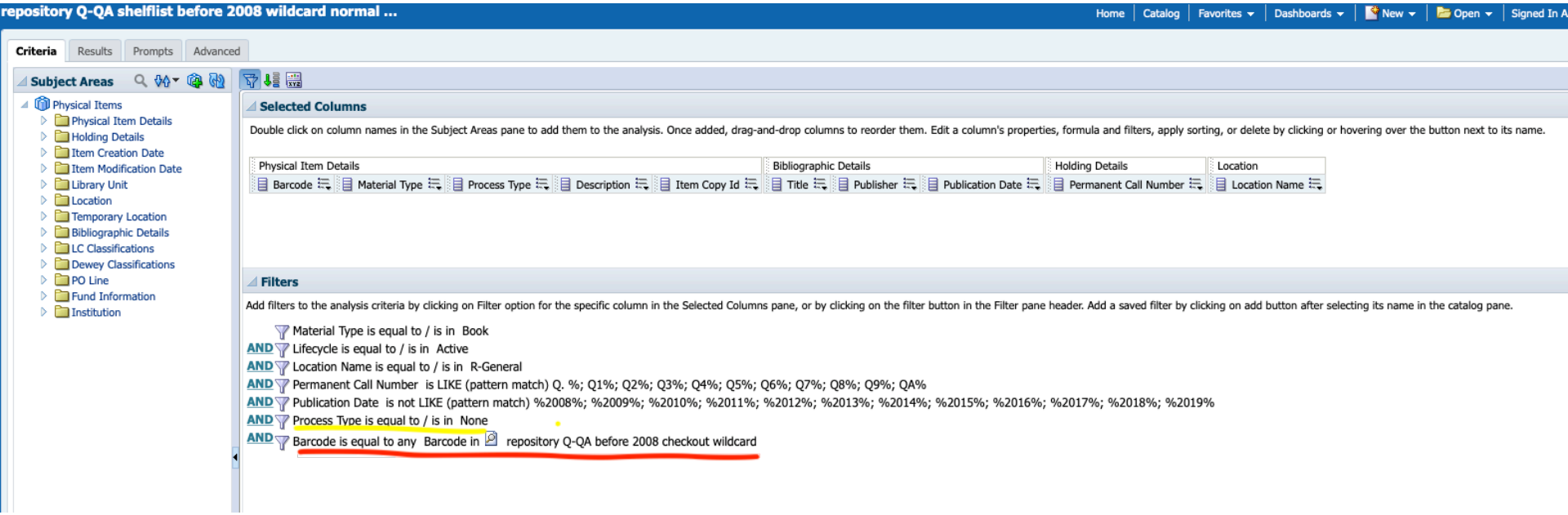
Challenge Three -- solution

So we had to get reports from Access, then manually combined Voyager loans with Analytics loans in Excel sheet and took out the duplicated records

Challenge Four

- We needed to exclude checkout data from our shelflist report because books being checked out were not being considered for weeding
- Using the checkout report, we excluded the checkout data from the shelflist report
- Some of the comparative reports in Alma Analytics returned errors, so we had to manually remove duplicated items by hand in Excel

Example: Excluding checkout data report.



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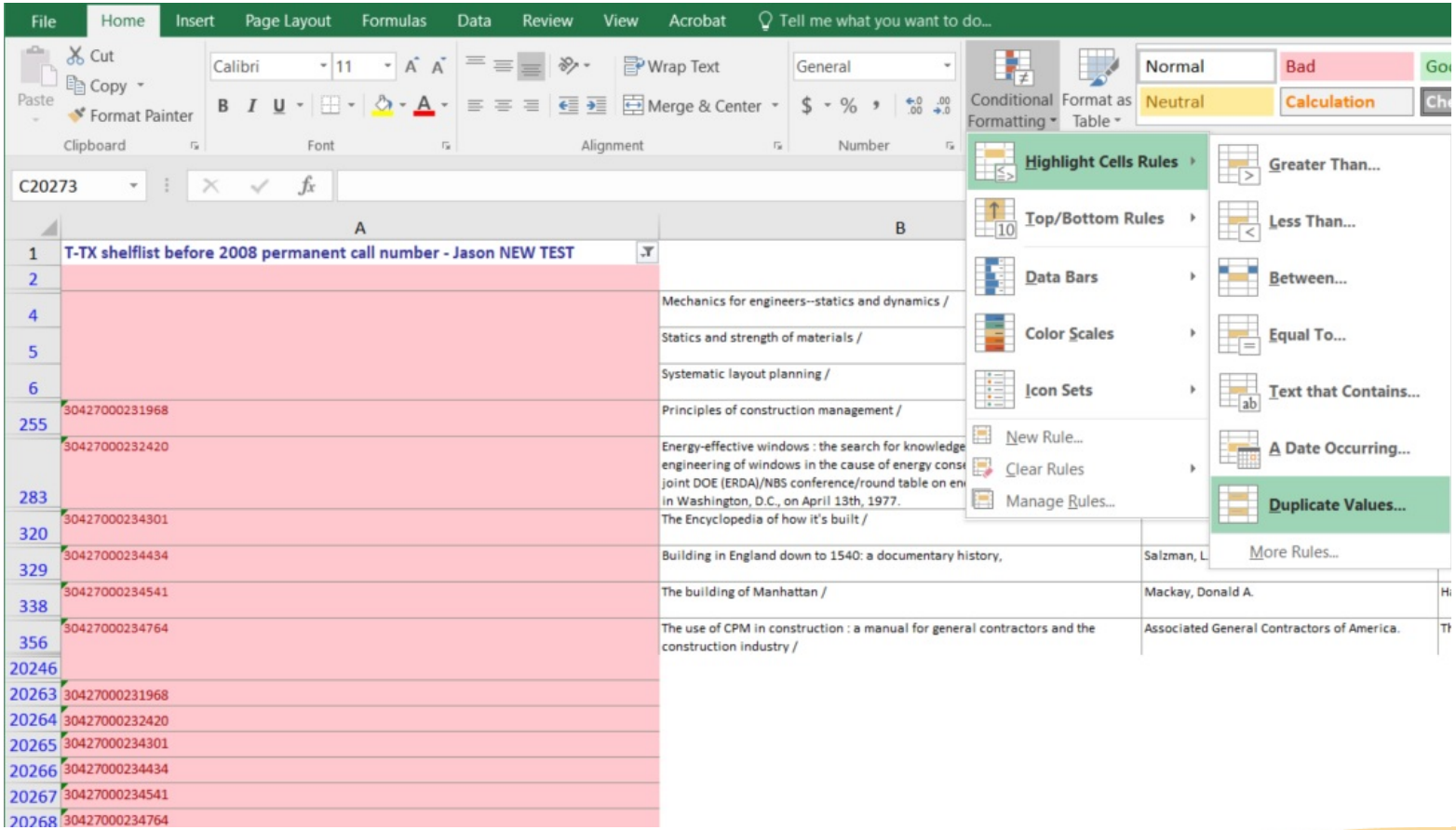
Example: Removing data by hand



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Challenge Five

- When we started creating reports in Analytics, there was a field called “Times Loaned - not sum” in Physical Items subject. We used it to get checkout counts
- After generating the report, we took a sample of data, examined it in Alma Fulfilment, and found a lot of discrepancy
- Then we found following explanation from Alma site:

Challenge Five – Exlibris explanaton

ExLibris Knowledge Center
a ProQuest Company

More Sites | System Status | Submit a Case

Search under current path

Alma

Home » Alma » Knowledge Articles » What is the difference between "Time Loaned" and "Times Loaned - not sum"

What is the difference between "Time Loaned" and "Times Loaned - not sum"

- **Article Type:** Q&A
- **Product:** Alma

Question

In Alma Analytics, in the Physical Items subject area there are two fields "Time Loaned" and "Times Loaned - not sum". What is the difference between them?

Answer

Please use the "Time Loaned" field only. The "Times Loaned - not sum" field does not deliver reliable results and will probably be removed in a future release.

Category: Alma Analytics - Alma

- **Article last edited:** 6/26/2014

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Conclusion

1. Count number of items in each classification
2. Shelflist published before 2008 excluding checkout data with classification code
3. Shelflist published excluding before 2008 with call number
4. Shelflist published in and after 2008 with classification code
5. Shelflist published in and after 2008 with call number
6. Books checked out before 2008
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Issues need to be solved in the future

- The last copy issue
- Compare our collection to other USG institutions using NZ report
- Compare our collection to HathiTrust report

Another resource and a tip

- Ex Libris Report: Physical Usage for Weeding
- Remember to take a small sampling of data to check in Alma to validate the report data

Thanks for your attention..

Any questions?