

collectionHQ Concise User Guide

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collectionHQ Concise User Guide



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Description	This document acts as a practical and concise guide to new users of collectionHQ, v7.0.0, to help customers understand the key tools and how they should be used.

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Introduction

collectionHQ is a collection performance improvement tool. It is a software application designed to help you manage your collections more effectively, and thereby help you to improve the performance of your collections. It also provides you with valuable assistance in understanding what type of material you should buy, to meet the needs of your customers. It does all this based on evidence of demand.

It uses the principles embodied in Evidence Based Stock Management (EBSM[®]), the collection performance improvement methodology specifically designed for libraries – see www.ebsm.com.

This document has been created to help you understand how to use collectionHQ at a practical level. It describes some of the key tools within collectionHQ, and how they should be logically rolled out within your organization.

The document assumes that readers have ideally already received initial go-live training. However it is written so that even those new to collectionHQ will find it easy to understand.

It is not an exhaustive document covering all tools. Instead, it has been purposefully written to be concise enough to be accessible, but detailed enough to get you up to speed with the key concepts. If users wish to understand the detail of individual tools then this information is provided in the various reference User Guides that accompany the software.

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A description of the various EBSM Stages, around which the tools have been created, is detailed below:

EBSM Stage	Description
Collection Maintenance	<p>The Collection Maintenance tools are designed to ensure that the library catalog is in a fit and healthy state to support the EBSM methodology. Inaccuracies with the catalog can produce erroneous results and advice within the action plans, as well as inaccurate performance reporting over time.</p> <p>Use of the Collection Maintenance tools will help to eradicate or minimize the effect of this.</p>
Collection Demand	<p>The Collection Demand tools are used to ensure that popular demand areas (authors and subjects) are being met with a satisfactory level of relevant items on shelves at any time.</p> <p>These tools work by identifying items that can be transferred from other library branches within the same library system, where the same items are over represented.</p> <p>The Collection Demand tools achieve the Outcome of Better Collection Relevance.</p>
Collection Refresh	<p>The Collection Refresh tools are used to help generate additional circulation from existing items. The tools are designed to ensure that the collections that a library system is offering do not stand still, and are constantly being refreshed with titles that patrons have not seen before.</p> <p>Most of the Collection Refresh tools achieve this through the use of Evidence Based swapping.</p> <p>The Collection Refresh tools achieve the Outcome of Better Collection Relevance and Better Collection Quality.</p>
Collection Removal	<p>The Collection Removal tools are used to cleanse shelves of poor quality items. Removing items that are physically unattractive or are not relevant to what customers want to read will increase the customer's general perception of the overall quality of provision.</p> <p>The two key measurements of poor quality collections addressed are grubby and dead items.</p> <p>The Collection Removal tools achieve the Outcome of Better Collection Quality.</p>
Collection Action	<p>Some of the tools present 'selection lists' from which choices are presented and items can be chosen for action – for example Popular Author Transfer, Popular Subject Transfer and Grubby Items Refresh.</p>

	The selected items are collated together into action plans that are presented within the Collection Action area of collectionHQ.
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The table below provides detail on each of the EBSM tools within collectionHQ. It states which of the EBSM Stages each belongs to, if the tool can be used within the Fiction or Non-Fiction Modules (or both), and describes what each tool is used for.

EBSM Stage	Fiction or Non-Fiction	Name of Tool	Description
Collection Maintenance	Fiction, Non-Book and Non-Fiction	Collection Check	Creates action plans for checking 'On Shelf' items, to ensure that that catalog accurately reflects the actual position.
	Fiction, Non-Book and Non-Fiction	Long Overdue Check	Creates action plans for checking 'On Loan' items that have not been returned for a long time, to ensure that that catalog accurately reflects the actual position.
Collection Demand	Fiction, Non-Book and Non-Fiction	Collection Use Summary	Summary of circulation across fiction and non-fiction collections. Identifies overstocked and understocked collections using status indicators. Highlights areas where purchase is required. Addresses collection relevance.
	Fiction	Popular Author Summary	Summary of fiction popular author provision, with status indication of areas requiring top up through transfer.
	Fiction	Popular Author Transfer	Finds matching underused titles and copies in other library branches. These are listed for possible transfer. Where no transfers are found, identifies recommended titles and numbers for purchase. This tool identifies all possible transfers and creates a 'Selection List' that allows specific items to be selected by the user on screen, adding them to the 'Transfer List'.
	Non-Fiction	Popular Subject Summary	Summary of non-fiction popular subject provision, with status indication of areas requiring top up through transfer.
	Non-Fiction	Popular Subject Transfer	Finds matching under used titles and copies in other Library branches. These are listed for possible transfer. Where no transfers are found, identifies recommended titles and numbers for purchase. This tool identifies all possible transfers and creates a 'Selection List' that allows specific items to be selected by the user on screen, adding them to the 'Transfer List'.
Collection Refresh	Fiction, Non-Book and Non-Fiction	Dead Items Refresh	Sometimes items become inactive because of their grubby condition - however their previous popularity merits refreshed copies being made available. This tool creates an action plan for refreshing these through re-

			bind or repurchase.
	Fiction, Non-Book and Non-Fiction	Grubby Items Refresh	<p>Many items that are grubby (worn out) in a library branch can actually be replaced by an underused, good condition copy from another library branch.</p> <p>This tool identifies all possible matches and creates a 'Selection List' that allows specific items to be selected by the user on screen, adding them to the 'Transfer List'.</p>
	Non-Fiction	Overstocked Subject Summary	Summary of overstocked non-fiction class ranges that library branches can swap to refresh their collections.
Collection Removal	Fiction, Non-Book and Non-Fiction	Grubby Items Summary	High level summary of current grubby (worn out) items position, with drill down option to action plan.
	Fiction, Non-Book and Non-Fiction	Grubby Items Removal	Creates action plans to keep grubby or worn item amounts to a level which will be acceptable to patrons. This produces a measurable outcome which has been identified as important to patrons.
	Fiction, Non-Book and Non-Fiction	Dead Items Summary	High level summary of current dead (inactive) items, with drill down option to action plan.
	Fiction, Non-Book and Non-Fiction	Dead Items Removal	Creates action plans to keep dead or inactive items to a level which will be acceptable to patrons. This produces a measurable outcome which has been identified as important to patrons.
Collection Action	Fiction, Non-Book and Non-Fiction	Transfer List	Creates an action plan for transferring items between library branches. The Transfer List action plan contains all items selected using the Popular Author Transfer, Popular Subject Transfer and Grubby Items Refresh tools.
	Non-Fiction	Swap List	<p>Creates an action plan for swapping non-fiction items in overstocked class number ranges between library branches.</p> <p>Arrangement is by library branch and then class number range.</p>

Some Basic Questions Answered

Q & A sections often reside towards the end of documents. However, let's start off by answering a few obvious questions you may have:

Q. Is collectionHQ linked to my ILS system?

A. collectionHQ is delivered to customers as a hosted, subscription-based service over the internet. On a regular basis, typically monthly, collectionHQ gathers and analyzes evidence of library collection usage, by extracting, loading and then analyzing data from the Integrated Library System (ILS). In doing so, it provides librarians with information to improve the performance of their collections, and helps them make better purchasing decisions.

Q. How do I access collectionHQ

A. An Administrator needs to first create a user account for you in collectionHQ. Once you know the login details for your user account, visit www.collectionhq.com . Click on 'login', and then enter your normal email address and the password you have been provided.

Q. How does collectionHQ help me to improve performance?

A. It does this by carrying out detailed analysis of your circulation figures in each of your branches to understand exactly what the demand is for different types of material and collections. It then measures collection performance against various Key Performance Indicators, or KPI's. The KPI's are those aspects of your collections that it is important to measure and monitor to help improve performance. You can then use this information to make better informed decisions about how to manage your collections, and what you should consider buying.

Q. How will I know if performance has improved?

A. A fundamental feature of collectionHQ is that it provides the ability to set targets for various aspects of your collections. Defining measurable targets, and letting you know how close you are to those targets, helps everyone in the library system to work towards achieving the goals that have been set, and helps to measure performance improvement. A small number of users in your library system have been designated as collectionHQ Administrators. The Administrators have the ability to change the default targets in the system.

Q. What kind of targets can be set?

A. There are a whole range of targets and parameters in the system. However, examples include defining the acceptable levels of 'dead' material in your branches - in other words, material that has not circulated for some considerable time. Another example is a target that helps you ensure that you have enough books for each of your most popular authors, so that customers are not disappointed when they visit the branch. Targets can be setup to be different for different branches, and they can even be different for different fiction collections.

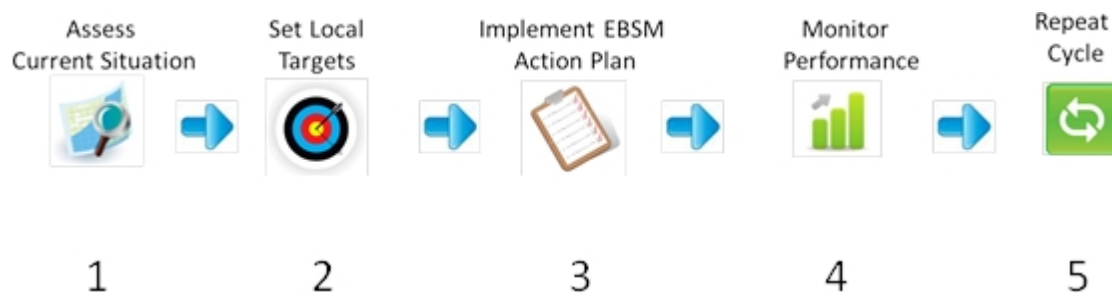
The Key Performance Indicators (KPI's)

The Key Performance Indicators represent the things that we should be interested in measuring and monitoring on an ongoing basis if we want to improve performance.

The KPI's are listed below:

KPI	Issues Addressed
Grubby Material	Users should not be expected to borrow items which are physically unattractive.
Dead Material	Users should not be expected to wade through hundreds of dormant items in the search for useful or desirable choices.
Popular Author Provision	Users have an expectation of finding a good selection of works by favorite authors on shelves at all times.
Popular Subject Provision	Users have an expectation of finding a good selection of material in the most popular subject areas.
Overstocked Subject Areas	Large quantities of unused and unwanted non-fiction items in any subject area is counter-productive.
Understocked Subject Areas	Supply should always try to match demand in non-fiction subject provision.

The Process of Improving Collection Performance



At a high level, the use of collectionHQ can be considered a process which can be broken into the following stages:

1. Assess the current state of your collections. By running some of the tools in collectionHQ , you can get a feel for how well your collections are performing. For example, you may run the Dead Items Summary tool to understand what percentage of your fiction collection is dead.
2. Once you have assessed the state of your collections, you may decide to change some of the targets or parameters in the Admin module. Alternatively, you may decide to leave them set to the default values that collectionHQ ships with. We will speak more about changing targets and parameters later.
3. Run one or more of the tools in collectionHQ. When you run a tool, this produces what we call an **Action Plan**. An Action Plan is essentially a report, but we call them Action Plans because they provide you with clear guidance as to what sort of action you should consider taking at the shelves to improve performance. Implementing the Action Plans normally involves performing some action at the shelves, such as weeding or transferring particular items from one branch to another.
4. Use the tools in the Performance Module to monitor how the performance of your collections has changed over time.
5. Repeat the cycle. Go back to the beginning, re-examine the state of your collections, decide if you would like to make any changes to your parameters or targets, and then continue running the tools to generate further Action Plans.

When you start using collectionHQ, you are embarking on an ongoing process of continuous improvement. The process does not end, since even when you arrive at a level of collection performance that you are happy with, you will continue to use collectionHQ to maintain that level of performance.

The Fiction and Non-Fiction Tools

Below is a brief summary of the tools in the Fiction and Non-Fiction Modules and what they are used for. Remember that all of the default values for targets and parameters can be changed by collectionHQ Administrators at your library system:

Tool Name	Purpose	Description
Collection Check	catalog Cleansing	Helps you to cleanse the catalog, by identifying items that are potentially missing. Any items that have not circulated for 4 years (default) or more are listed. Use the list to check the shelves. For items that are correctly identified as missing in this Action Plan, update the status of the item in the ILS to the relevant status (e.g. Lost or Missing).
Long Overdue Check	catalog Cleansing	Identifies items which have been out on loan for a significant period of time, but which have not been returned. You may decide that such very long overdue items are unlikely to be returned at all, in which case you may decide to update their status in the ILS accordingly. This tool uses the same time period as defined for 'Dead' material. E.g if the parameter for Dead is set to 180 days without circulation, this tool uses this period before flagging up an item as being 'Long Overdue'.



Having as clean a catalog as possible is important to get the most out of collectionHQ. The catalog cleansing tools help you to achieve this. Having a clean catalog potentially reduces the time staff waste looking for books that don't exist on the shelves, and also minimizes the chances of a customer requesting a hold for an item that does not exist. It also has the added benefit of reducing the percentage of material that collectionHQ is showing as being 'Dead'. Items that have a status equivalent to 'Lost' or 'Missing' in your ILS will not subsequently be loaded into collectionHQ. We recommend cleansing the catalog is the first thing you do when you start using collectionHQ.

Dead Items Summary	Weeding	<p>A summary level report that identifies what percentage of items in your chosen collection (or your chosen group of collections) are 'Dead'. This percentage is displayed for each branch, and is compared with the target set for that branch.</p> <p>Dead items are items that have not circulated for 180 days or more (default).</p>
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Dead Items Removal	Weeding	An action plan that identifies the specific items which are dead at each branch. Use the list to weed dead material from the shelves. You can choose which collections to run this for.
Grubby Items Summary	Weeding	<p>A summary level report that identifies what percentage of items in your chosen collection (or your chosen group of collections) are 'Grubby'. This percentage is displayed for each branch, and is compared with the target set for that branch.</p> <p>Grubby items are items that have circulated more than 40 times (default) , and are likely to be in poor condition.</p>
Grubby Items Removal	Weeding	<p>An action plan that identifies the specific items that are likely to be grubby. Use the list to weed potentially grubby material from the shelves. You can choose which collections to run this for.</p> <p>If, upon examining an item, it is clear that the item is still in good condition, click on the green 'plus' symbol next to the item in the action plan. This extends the item so that it does not appear on the action plan again for another 10 or 20 circulations, say.</p>



You don't need to weed all items on the Removal lists, only the number needed to help you meet the target for that collection. This number is stated at the top of each page. You may find that there are large numbers of items that collectionHQ is suggesting need to be removed to meet the target for a collection. If this is the case, remember that you control how many items are removed each month. For example, if 300 items need to be weeded in total from a collection, you may decide to spread the weeding activity over 3 months to make the task more manageable.

Grubby Items Refresh	Transfer Tool	An Action Plan that identifies items that are potentially grubby in your branch, and then attempts to identify copies of the same title in other branches. You can then choose to transfer some of these items to your own branch
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		<p>collectionHQ makes sure that the copies it identifies in the donating branches are dead and also not grubby.</p> <p>This tool helps your library system to save money by making better use of material that you have already purchased, by balancing supply with demand.</p> <p>The user in the receiving library chooses the items to transfer over. This is done by simply ticking the relevant tick box on the screen.</p>
Popular Author Summary	Transfer Tool	<p>A report that identifies the most popular fiction authors in your branch (the default is the top 100), and then checks if each of these authors has had a sufficient proportion of their books on the shelves for the duration of the last month. If only a relatively small percentage of books were available for customers to borrow for any particular author, these authors will be highlighted in red.</p> <p>The next step is to run the Popular Author Transfer tool to identify which items are actually available to transfer from other branches in to your branch for each author.</p> <p>Ensuring you have a sufficient number of books on the shelves for the most popular authors reduces the chances of customers being disappointed when they visit the branch.</p>
Popular Author Transfer	Transfer Tool	<p>An action plan that identifies popular authors that don't have enough items on the shelves in your branch, and then attempts to identify books by that author in other branches that you can then choose to transfer to your own.</p> <p>collectionHQ makes sure that the items it finds in other branches are dead and also not grubby.</p> <p>This tool also helps your library system to save money by making better use of material that you have already purchased, by balancing supply with demand.</p>

		<p>The user in the receiving library chooses the items to transfer over. This is done by simply ticking the relevant tick box on the screen.</p>
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When it comes to identifying items to transfer from one branch to another, collectionHQ will ensure that the copies in the donating branch are Dead and not Grubby. However, note that collectionHQ has a separate pair of parameters that allow you to define what Dead and Grubby values should apply to items that should be considered for transfer. These parameters are different to the normal Dead and Grubby parameters used for weeding. See the section on Targets and Parameters for more details. The number of days that an item must not have circulated for before being considered eligible for transfer, and the maximum number of circulations it must have achieved, are both normally set to lower values than the normal Dead and Grubby parameters used for weeding.



Remember to set up a Transfer Group in the Administration module. A transfer Group is a way of telling collectionHQ which branches are allowed to transfer material between each other. You can have multiple transfer groups if you want. The same branch can also exist in more than one transfer group. Smaller library systems may have only one transfer group containing all branches, but larger ones may have multiple transfer groups. These might be arranged by geographic region, for example. Sometimes the largest branch may exist in each transfer group. This way, smaller branches always have access to a large source of material.

Transfer List	Transfer Tool	<p>Once users have finished making all of their selections on screen for items that should be transferred to them, each branch should then use this tool to actually create a pick list of those items that have been requested from their own branch.</p> <p>This pick list can be used to identify items to be taken off shelves and sent to other branches.</p> <p>Users should ensure they change the location of these items on the ILS at the time of transfer.</p>
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When using the transfer tools, members of staff in the receiving library choose which books they wish to receive. A practical way to implement this process is to designate a particular date in the month by which all team members should have completed making all of their selections using the tick boxes in collectionHQ. Once that day arrives, this is then everyone's trigger to run the Transfer List and move the items. In the event that a

selected item does not make its way through to the receiving branch, this does not ultimately cause a problem so far as collectionHQ is concerned – each month, the process simply starts again.



Whenever an item is selected for transfer in to another branch, the donating library should always ensure the item is sent. The only exception should be if the item has subsequently circulated and is no longer available. However, this should not happen often, as the candidate items are all dead to begin with anyway. There is no point in hanging on to an item at a branch if it is not circulating, especially if collectionHQ shows there is a demand at another branch for that item or type of material.

Dead Items Refresh	Replace Item	This action plan identifies items that are both dead and grubby. If an item is grubby, this indicates that it has been popular in the past. However, it is now not circulating. This may be because it is grubby. Use this tool to decide if this is the case, and if you should consider buying a new copy of this item.
Collection Use Summary (Fiction)	Information Report	This tool identifies the relative proportion of items in each collection and the relative circulations of each collection. It then allows you to compare each to see if the proportion of circulations generated by a collection is in line with the proportion of items that exist for that collection.
Collection Use Summary (Non-Fiction)	Information Report	<p>This tool analyzes each Dewey range and identifies if any are 'Overstocked', 'Understocked' or 'High Use'. It helps you to gage the performance of each Dewey range.</p> <p>A Dewey range is Overstocked if the vast majority of items in that Dewey range (default > 80%) have not circulated in the last 6 months, or Understocked if only a small minority (default < 30%) have not circulated in the last 6 months. Ideally, each Dewey range should be somewhere in between.</p> <p>A Dewey range is defined as being 'High Use' if the average number of circulations per item is above a set limit (default 20).</p> <p>A Dewey range may be flagged as 'Saturated' if it is both Overstocked and High Use. This might indicate that the material has been so heavily read that new material is needed to re-</p>

		invigorate customer interest.
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Popular Subject Summary	Transfer Tool	<p>A report that identifies the most popular non-fiction subjects in your branch, and then checks if any of these subjects is also classed as Understocked. These will be highlighted in red.</p> <p>Popularity is determined by ranking subjects in terms of the average number of circulations per item. Only the most popular subjects are displayed (default average circulations per item > 20). This creates a level playing field and allows subjects with relatively small numbers of items the ability to be recognized as popular.</p> <p>The next step is to run the Popular Subject Transfer tool to identify which items are actually available to transfer from other branches in to your branch for each subject.</p>
Popular Subject Transfer	Transfer Tool	<p>An action plan that identifies popular subjects that don't have enough items on the shelves in your branch, and then attempts to identify books in that subject area in other branches that you can then choose to transfer to your own branch.</p> <p>collectionHQ makes sure that the items it finds in other branches are dead and also not grubby.</p> <p>This tool also helps your library system to save money by making better use of material that you have already purchased, by balancing supply with demand.</p> <p>The user in the receiving library chooses the items to transfer over. This is done by simply ticking the relevant tick box on the screen.</p>
Overstocked Subject Swap Summary	Swap Tool	<p>Produces a summary level report of Dewey ranges in your branch which contain items that can potentially be swapped with other branches.</p> <p>Swaps will only be identified where the <i>same</i> Dewey range happens to be</p>

		<p>Overstocked in 2 or more branches.</p> <p>Swapping is a way of getting some final circulations out of non-fiction material that you otherwise would have weeded straight away. The rationale is that fresh material appears on the shelves of the receiving library, and as a result you may just achieve some extra circulations before weeding these items for good.</p>
Swap List		<p>collectionHQ identifies a selection of non-fiction items that potentially could be swapped between branches. Users can choose to make these swaps or ignore them.</p>



In order for the swap tools to return any data, users must set up a Swap Schedule and a Swap Group. Both of these activities can be performed in the Administration module.

A Note on Transfers and Swaps

Transfers and Swaps are different types of item movement mechanisms in collectionHQ. The differences are detailed below:

	Transfers	Swaps
Applies to	Fiction and Non-Fiction Tools	Non-Fiction only
Movement of items	One-way movement of items. In other words, branch A may give books to branch B, but branch B may not give any books back to branch A in return.	Reciprocal action. The same number of books must be moved out of and to each branch.
Applies to the following tools	<ul style="list-style-type: none"> Popular Author Summary and Transfer (fiction) Grubby Items Refresh (both fiction and non-fiction) Popular Subject Summary and Transfer (non-fiction) Transfer List (both fiction and non-fiction) 	<ul style="list-style-type: none"> Overstocked Subject Swap Summary Swap List

Transfer recommendations are based on a proven level of demand at the receiving branch. Swap recommendations are not. For this reason, Transfers are the more valuable activity of the two. Swaps can be regarded as an optional activity, as they are less likely to generate large numbers of extra circulations. For this reason, we recommend that Swaps are not used when you first go live with collectionHQ. You may wish to wait about a year before using the swap

tools.

Targets and Parameters

The most commonly accessed targets and parameters in collectionHQ are listed below:

Target/Parameter	Description
Dead Items Target Maximum Percentage	The maximum allowable percentage of dead items on the shelf at any time. Default 10%.
Dead Items Definition (days)	The number of days that an item must have been without circulation before it is considered dead. Default 180 days.



If an item moves from one branch to another, the counter for 'Dead' starts again.

Grubby Items Target Maximum Percentage	The maximum allowable percentage of grubby items on the shelf at any time. Default 10%.
Grubby Items Cumulative Use Definition	The number of circulations that an item must have had before it is considered potentially grubby. Default 40 circulations.
Popular Author Target Minimum Percentage	For each of the most popular authors in your branch, the minimum percentage of their items that should be on the shelf at any one point in time. Default 25%.
Item Movement Transfer (days)	The minimum number of days that an item should not have circulated for before it can be considered as a potential candidate for transfer out of a branch. Default 90 days.
Item Movement Transfer (uses)	The maximum number of circulations that an item must have had for it to be considered as a potential candidate for transfer out of a branch. Default 30 circulations.



An item must have satisfied the criteria set by both Item Movement Transfer (days) and Item Movement Transfer (uses) for it to be a candidate for transfer out of a branch. This ensures it is only moved if it is not in demand at the current location and if it is very likely to be in good condition.

Collection Check Definition (uses)	The minimum number of days that an must have been without circulation before it should be considered as possibly missing. Default 1460 days.
Dewey Group Overstocked Target Percentage	Minimum percentage of items in a subject area that should not have circulated in the last 6 months for that subject area to be considered Overstocked. Default is 80%.
Dewey Group Understocked Target Percentage	Maximum percentage of items in a subject area that should not have circulated in the last 6 months for that subject area to be considered Understocked. Default is 30%.
High Use Purchase Threshold	Minimum number of average circulations per item that a subject area must achieve in order to be considered a High Use subject. Default is 20 circulations per item.
Average Fiction/Non Fiction Book Price	The average price of a book that the Selection module will use when creating Standing Order specifications (fiction) and certain non-fiction specifications.



Remember that targets and parameters can be setup so that they are different for individual branches and also different for individual collections if need be.

A Note on Targets and Parameters

The default targets and parameters that exist within collectionHQ have been arrived at through trial and error when EBSM was originally devised in the early nineties.

When you first go live with collectionHQ, it is best if you run the Action Plans to simply get a feel for how your collections are performing. Once you have done this you can make a better informed decision about how to change any of the targets and parameters, if at all.

The targets and parameters that you set are a matter for your library – you have complete control over these. There is no right or wrong answer as to what these settings should be. Different library systems have very different characteristics – varying collection size, number of branches, staff count, materials budget and opening hours to name but a few. For this reason, the settings will vary from one library system to another. Often, customers are happy to stay with the system defaults to begin with.



There is one caveat. Do not set the targets to such a level that collectionHQ no longer asks you to take any action at the shelves. If you find yourself in the situation where collectionHQ is not making any recommendations about work to be done, it can mean one of two things:

1. You have an extremely high performing library, with extremely low levels of dead and grubby material, despite the fact that Dead and Grubby parameters have been set to very stringent levels i.e. Grubby is set to a low level of circulations and Dead is also set to a very low number of days. If this sounds like you, well done!
2. Your parameters are set to values which are far too forgiving. As a result collectionHQ is not able to make recommendations for action based on your settings, and your collection performance will very likely not improve. Remember, performance improvement is driven by action.

Performance Module

The performance module is used predominantly to help you understand how your performance has improved over a period of time, by measuring the changes relating to various KPI's.

Using the Performance Module, you can measure performance improvement between two chosen datasets. For example, you may wish to compare how much improvement there has been in levels of dead material on shelves between the start of the year and the end of the year.

Changes to a range of KPI's can be measured over time, including:

- Levels of Dead Material
- Levels of Grubby Material
- Level of Popular Author Provision
- NF Collection Use Performance, indicating how many NF subjects are normal, overstocked or understocked at two points in time.



In order to ensure that the comparison of 2 datasets using the Performance tools is always accurate, it is important to designate at least one dataset as a 'Performance Benchmark' dataset. This can be done in the Administration Module. Doing this ensures that when comparing your chosen Performance Benchmark dataset with the latest dataset in the system, the figures for each dataset have been calculated using the latest set of targets and parameters in force in collectionHQ at the current point in time. This means you are comparing like with like.

Failure to do this might produce inaccurate results. For example, if in January, the dead parameter was set to 180 days (without circulation), but by June this had been changed to, say, 365 days, comparing January with June would produce misleading results, unless January was designated as a Performance Benchmark dataset. Such datasets appear with the text '(P)' after the dataset name in the Performance Module

The Performance Module can also be used to report on how successful the performance of transferred material has been, for both fiction and non-fiction transfers. See the tools under 'Transfer Performance' in the Performance Module. This analysis is based on the transfers that collectionHQ has recommended using the transfer tools. Examples of transfer tools are 'Grubby Items Refresh' and 'Popular Author Transfer'.

In addition, tools exist in this module to show you who has been running which collectionHQ tools in your library system, and which tools are being run most frequently. See the 'System Activity' section in the Performance Module.

Marketing Module

The marketing Module has 3 sub-modules within it. These are detailed below:

Sub-Module	Description
Top Charts	Allows members of staff to run charts of the most popular author or title, over the course of the last month, either at branch level or system level. To be more specific, it works out popularity based on the number of circulations generated between the previous dataset and the current (latest) dataset. These charts can be printed out or exported to MS Word so that they can be displayed in the branches. Also produces lists of recently added titles.
Experimental Selection	Allows you to experiment with new types of material in small quantities and measure how successful these purchases have been. An experiment can last for any given duration. Reports allow you to measure the success of all active experiments at any given point in time, and allow you to see the circulation figures for each item in the experiment.
Experimental Placement	This allows you to experiment with the placement of material in a branch. By setting up a Placement experiment, you can see if moving material from one location in a branch to another location in the same branch has affected circulations over time. This tool is also well suited to analyzing the success of marketing campaigns.



The key difference between Experimental Selection and Experimental Placement is that the latter is concerned with analyzing existing material, whereas the former is designed for new material.

Experimental Placement provides you with a 'before' and 'after' picture for existing material, so you can compare circulation figures prior to the experiment starting with the figures achieved during the experiment.



We track the number of circulations items within an experiment have had by tagging the items with a special code. This code must be entered in to the 'Notes' field of the item record in the ILS for each of the items in that experiment. The same code should be used for all items in any particular experiment. The code should always begin with 'EXP' and would typically be followed by a unique identifier, such as a sequence number. An example may be 'EXP0001'. This code also needs to be entered into collectionHQ when setting up the experiment.

Selection Module

The selection module has a range of tools that can help you better understand what is in demand, and therefore what type of material you should consider buying.

The list of the main tools is detailed below:

Tool	Purpose
System Wide Selection (Fiction)	To help you understand what the demand is for different genres of fiction material across the system, by telling you the number of circulations generated over all time for each genre. collectionHQ then apportions the money you wish to spend across each genre in proportion to the percentage of circulations attributed to that genre. For example, if 10% of circulations across adult fiction are generated by Crime, 10% of the available spend will be allocated to Crime. You have the ability to override this value and change the spend amount.



There exists a version of this tool that runs at individual branch level. It is called Branch Selection. There is also a version that can be run for a group of branches, assuming you have groups defined within collectionHQ. This is called Group Wide Selection.



If you look at the Selection module, you will notice that some of these tools have the word 'Collection' after their name, whereas others have the word 'BISAC'. The 'Collection' versions of these tools allow you to analyze the fiction collections based on the collections that are defined in your ILS system. The 'BISAC' versions analyze your collections based on the BISAC genres. Even if you do not have BISAC information for each item in your ILS, collectionHQ can work this out to provide you with an alternative view of the analysis.

Tool	Purpose
System Wide Selection (Non-Fiction Proportional)	To help you understand what the demand is for different non-fiction Dewey ranges across the system, by telling you the number of circulations generated over all time for each subject. collectionHQ then apportions the money you wish to spend across each subject in proportion to the percentage of circulations attributed to that subject. For example, if 10% of circulations across adult non-fiction are generated by Gardening, 10% of the available spend will be allocated to that subject. You always have the ability to override this value and change the spend amount.
System Wide Selection (Non-Fiction)	Note that this non-fiction tool does not have the word 'Proportional' after its name. This tool behaves very differently to the one above. It identifies the ' core ' non-fiction demand in each branch. The 'core' demand is the minimum amount of money that you need to spend to satisfy non-fiction demand at that branch. It works this out by first identifying how many 'Understocked' and 'High Use' Dewey ranges there are in a branch. It then uses a formula (which you can customize in the Administration module) to recommend that 1 new item is purchased for every 5, say, that you own for each Understocked subject area in a branch, and the same for

	<p>each High Use subject area. In other words, if a subject area is both Understocked and High Use, collectionHQ would recommend that you buy 2 items for every 5 that you own. It does all of this based on an average non-fiction book price. Remember, this is all configurable by the Administrator, so you can change these ratios and the price used to suit your needs. Having worked this out for each branch, this tool then aggregates the amount to be bought to provide a system-level view.</p>
--	--



There exist versions of these tools that run at both individual branch level and at group level (for a group of branches).



The advantage of this tool is that it allows you to get the most out of your non-fiction materials budget by indicating the amount you need to spend to meet demand. If the amount collectionHQ recommends to spend is less than the amount you were budgeting for, then you can use the surplus on other parts of your collection to potentially greater benefit. On the other hand, if your materials budget is being squeezed, you can use this tool to justify why you need to spend more on non-fiction, as the amount collectionHQ recommends is the minimum you should consider spending to meet demand.

Floating Collections

Using collectionHQ with your Floating Material

collectionHQ has many tools which can help you manage and track the performance of your floating collections. The following section will discuss using collectionHQ effectively with your floating collections.

The first step in using collectionHQ with your floating collections is to mark which collections float so that collectionHQ can start to track these as floating.

Marking a Collection as Floating

collectionHQ allows two ways to mark collections as floating. Either through the Collection Edit screen or by using the Floating Collection Management section. If you wish to mark a single collection as floating then collection edit is a good choice, however, if you want to mark several collections quickly then Floating Collection Management is the best tool to use.

Marking a Single Collection as Floating

To mark a single collection as floating then navigate to Administration > ILS Settings then Fiction Collections (if you are marking a Non-Fiction or Non-Book collection then navigate there instead).

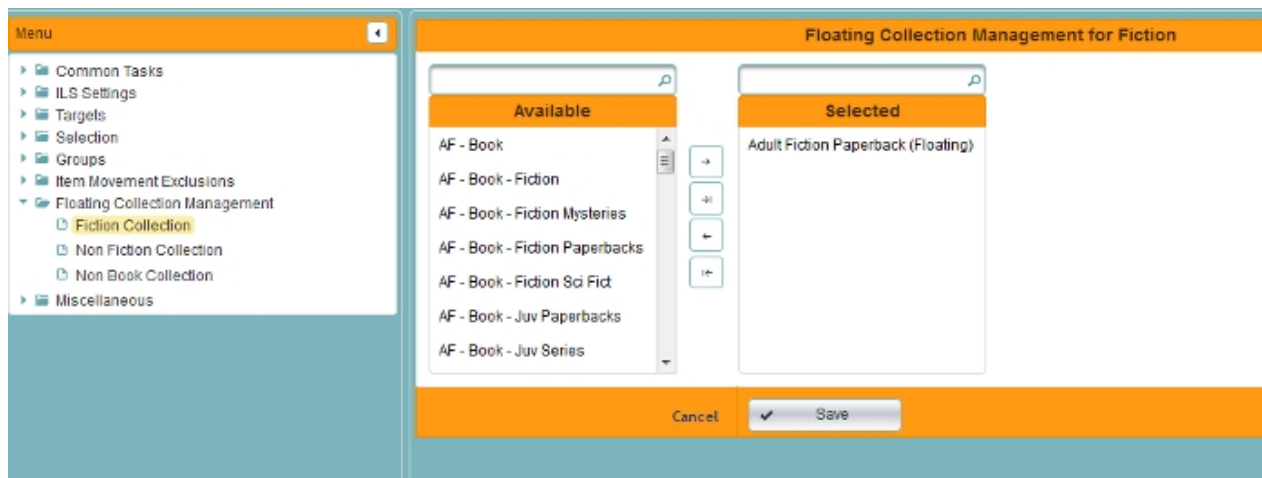
After selecting the type of collection you wish to edit you will see a list of your Library Service's collections. From this list click "Edit" on the one you wish to edit. This will bring you to the collection edit screen.

Once on this screen to mark a collection as floating simple check the "Mark as Floating Collection" then click "Save".

Marking Multiple Collections as Floating

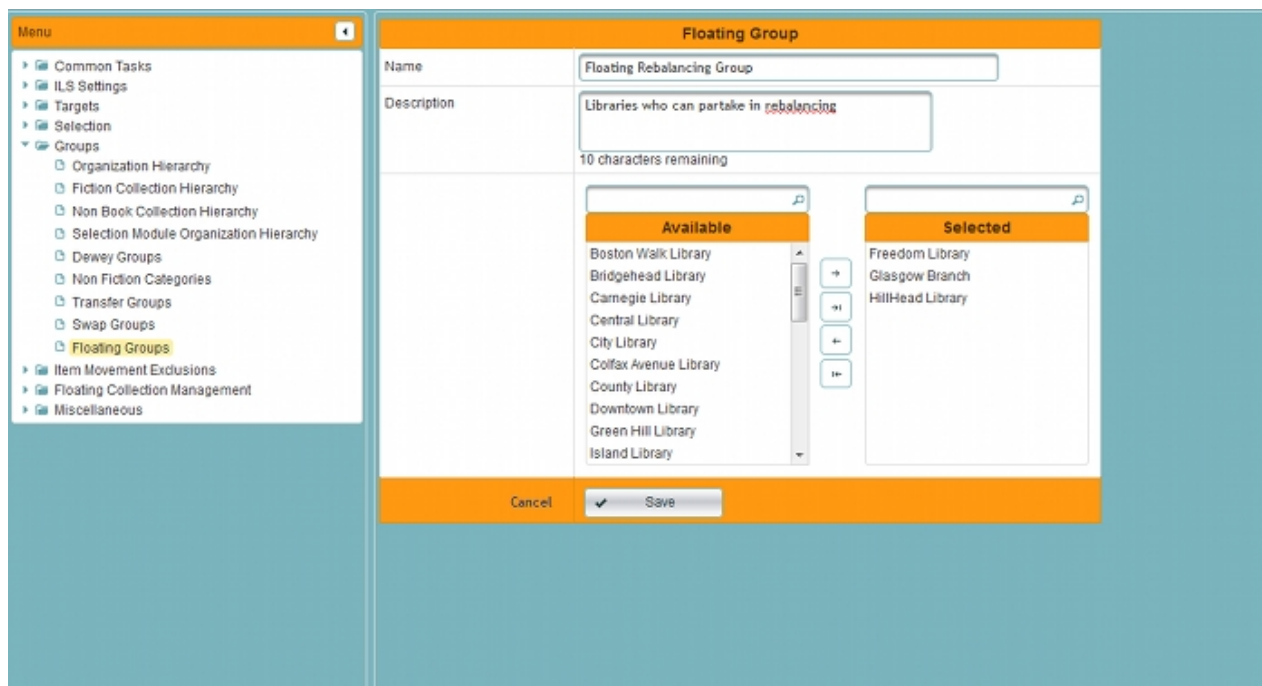
The Floating Collection Management section of Administration provides an easy "drag and drop" interface to allow you to quickly mark a collections as floating. To do this click on the type of collection (Fiction, Non-Fiction or Non-Book) from the Administration tree. From here the

"Floating Collection Management" screen will be displayed. All collections which aren't currently marked as floating are shown in the "Available" panel. To mark collections as floating drag them from the "Available" panel to the "Selected" panel. Once you have drag all the collections you wish to mark then click "Save".



Setting up Floating Groups

Floating Groups perform a similar action to the Transfer and Swap Groups with collectionHQ. Floating Groups allow you to set up which branches can have material either "Pushed" or "Pulled" to them using the Floating Rebalancing Tools.



Before Using the Floating Tools

Before moving on to use the floating tools it is important that your Library Service has completed the Collection Check tool to ensure that your ILS accurately represents your catalog. To allow you to check the status of your catalog cleansing you can consult the Service Wide Collection Check Status report and also the Collection Check Performance Tools.

Using CollectionHQ with your Floating Collections

Once you have set up your floating collections and set up your "Floating Group" then in your next dataset Floating statistics will be generated. There are several tools which collectionHQ provides which will interact with your floating collections:

Floating Movement Performance

The performance module within collectionHQ provides the ability for you to analysis how your floating items are performing as they move to new locations. This tool shows the performance of all floating items which moved location which were not moved as part of a collectionHQ transfer or swap operation. This means they were not moved by Popular Author Transfer, Popular Subject Transfer, Grubby Item Refresh, Swaps or Floating Collection Rebalancing.

collectionHQ tracks the circulation rate in the previous location and compares this to how items are performing in the location the item has floated to. The change in "Circulation per Copy per Month" allows unique analysis of how floating items perform as they move location.

Floating Movement Performance - Library Summary (Fiction)										
Floating movement between		01-Jan-12								
and		01-Mar-13								
Floated To	Number Of Copies	(click to drill down)	Circulation Since Movement	Average Months Since Movement	Average Monthly Circulation Since Movement	Circulation Per Copy Per Month			Change	
						Before Movement	After Movement			
All	47	items source collections	235	11.10	3.12	0.79	0.45	-0.33		
Library A	1	items source collections	5	12.00	0.41	1.50	0.42	-1.08		
Library B	9	items source collections	45	12.00	3.75	2.01	0.42	-1.50		
Library C	14	items source collections	70	9.64	7.26	0.24	0.52	0.28		
Library D	1	items source collections	5	11.00	0.45	0.00	0.45	0.45		
Library E (SMALL)	8	items source collections	40	11.00	3.63	0.39	0.45	0.06		
Library F (SMALL)	6	items source collections	30	11.16	2.68	0.30	0.45	0.15		
Library G	8	items source collections	40	10.87	3.67	1.07	0.46	-0.61		
Oct 4, 2013 8:46 AM Floating Movement Performance - Library Summary (Fiction) Page: 1 / 1										

Floating Collection Rebalancing

When a collection is floated it introduces the risk that where the item is floating away from will become Understocked in that particular collection. There is also the risk that when it arrives at its new destination it will make the collection Overstocked at that new branch. collectionHQ allows you to address this issue by offering the "Rebalancing" toolset.

The Rebalancing tools allow you to set up transfers of material within a collection from locations where the collection is overstocked to locations where it is currently understocked, thus allowing you to rebalance your stock. This is much more powerful than simply sending an item back to where it originated from as, by using the rebalancing tools, the item is being sent to where evidence suggests it will be of the most use (i.e. by reprovisioning understocked locations).

Pushing Items from Overstocked Branches

Running the Push report allows a library which is currently Overstocked in a floating collection and allow them to set up a transfer to a location where that collection is Understocked. collectionHQ will work out the amount of items which can be transferred and show this in the "Advised to Transfer" amount.

Floating Items Rebalance (Fiction) - Push

Source Library: Library A

Show Barcodes ☐

Collection: Fiction Horror (FIC-HOR)		OVERSTOCKED (32.25%)	Max To Transfer (Push): 11					
Title	Author	ISBN	Barcode	Push To Library	Circulation	Last Use Date	Filter 1	Filter 2
CLUTTER CLINIC : ORGANISE YOUR HOME IN SEVEN DAYS,THE	LOWERY, ROMAINE	9700112358228	901234567057	<input checked="" type="radio"/> Retain Item	1	Sep 15, 2012	ENG	
				<input type="radio"/> Library B				
Title	Author	ISBN	Barcode	Push To Library	Circulation	Last Use Date	Filter 1	Filter 2
COOL HEAD,A	RANKIN, IAN	9700112358914	901234567059	<input checked="" type="radio"/> Retain Item	1	Sep 15, 2012	ENG	B
				<input type="radio"/> Library B				
Title	Author	ISBN	Barcode	Push To Library	Circulation	Last Use Date	Filter 1	Filter 2
DANDY GILVER AND AN UNSUITABLE DAY FOR A MURDER	MCPHERSON, CATRIONA	9700112358457	901234567058	<input checked="" type="radio"/> Retain Item	1	Sep 15, 2012	ENG	
				<input type="radio"/> Library B				

Pulling Items from Overstocked Branches

Running the Pull report allows a library which is currently Understocked in a floating collection and allow them to see items which exist in other locations which are Overstocked. collectionHQ will work out the amount of items which can be transferred and show this in the "Advised to Transfer" amount.

Floating Items Rebalance (Fiction) - Pull

Receiving Library: Library A

Show Barcodes ☐

Collection: Fiction Book (FIC-BK)		UNDERSTOCKED (-16.13%)	Advised To Transfer (Pull): 11						
Title	Author	ISBN	Barcode	Pull From Library	Circulation	Last Use Date	Filter 1	Filter 2	
COUNT TO TEN	ROSE, KAREN	9700112358990	901234567032	<input checked="" type="checkbox"/> Library B	1	Sep 15, 2012	ENG	B	
Title	Author	ISBN	Barcode	Pull From Library	Circulation	Last Use Date	Filter 1	Filter 2	
DARKNESS MORE THAN NIGHT,A	CONNELLY, MICHAEL	9700112359317	901234567028	<input checked="" type="checkbox"/> Library B	29	Sep 15, 2012	ENG	C	
Title	Author	ISBN	Barcode	Pull From Library	Circulation	Last Use Date	Filter 1	Filter 2	
EGO TRICK : IN SEARCH OF THE SELF,THE	BAGGINI, JULIAN	9700112359614	901234567035	<input checked="" type="checkbox"/> Library B	1	Sep 15, 2012	ENG	B	
Title	Author	ISBN	Barcode	Pull From Library	Circulation	Last Use Date	Filter 1	Filter 2	
EMPEROR'S TOMB,THE	BERRY, STEVE	9700112359386	901234567034	<input type="checkbox"/> Library B	1	Sep 15, 2012	ENG	B	

Additional Notes on Floating

For all collectionHQ customers, but particularly for those who float collections, it is important to ensure that your catalog matches the actual stock which you have on shelf. This can be achieved by ensuring the Collection Check tool within the stage 1 "Cleansing" tools within collectionHQ are addressed. Having a large number of items on your Collection Check report while using the Rebalancing (and other collectionHQ tools) can result in staff attempting to go to the shelf to look for items which collectionHQ has already identified are no longer present in your catalog. The System Wide Collection Check Summary tool can be used to see, at a library service level, branches where Collection Check cleansing still has to take place. It is also possible to use the Collection Check Performance tools to track over time how this cleansing process is proceeding.

Rolling Out collectionHQ

As you can see, collectionHQ consists of a range of different tools which are designed to work together to improve collection performance.

It will take a little time to train staff at the library system on various aspects of collectionHQ, but once this has been done, carrying out the various recommended actions will become second nature. It should also be noted that staff do not need to have a working knowledge of every tool within collectionHQ before they start using it.

Below are some simple guidelines you can use when planning the rollout of collectionHQ.

Clean the Catalogue

Cleansing the catalog is the first task anyone using collectionHQ should perform. Having a clean catalog and identifying lost or missing items has various benefits:

1. Staff do not waste time looking for items on the shelves that do not exist, when either weeding dead or grubby material or when selecting books to be transferred to another branch.
2. Customers do not waste time placing holds for books that do not exist.
3. The percentage of material that is showing as Dead in collectionHQ will automatically decrease once the catalog has been cleansed and missing items have been identified.

Use the Collection Check tool to identify items that are potentially lost or missing. Once you have checked the shelves and confirmed that the items do not exist, you should update the ILS for each of the missing items, by updating the status of the item accordingly. Lost or missing items are not subsequently loaded into collectionHQ. You may decide to do this cleanup a few collections at a time, or you may decide to ask all staff in all branches to do this for as many collections as possible. There is no prescribed right or wrong way to do this. Do what feels right for your library system.

You can also use the Long Overdue tool to identify long overdue items. Those that are very long overdue you may decide are unlikely to ever be returned so you may wish to update the status of those items too, so that they are excluded from future collectionHQ datasets.



Note that all the items appearing on the Collection Check action plans have not circulated for a long time, typically several years although you can configure this. They are all supposed to be on the shelf. If they are not, then they are almost certainly missing.

After Cleansing - Transferring and Weeding

It is important to get as much value out of your existing material as possible, and also to do the best to improve the level of service provided to customers. For that reason, once the catalog has been cleansed, you should use the tools in collectionHQ that analyze areas of low demand and high demand and make recommendations about what material to transfer from one branch to another.

The transfer tools that help you to do this are:

- Grubby Items Refresh
- Popular Author Summary/Transfer (fiction) (these are 2 separate tools)
- Popular Subject Summary/Transfer (non-fiction) (these are 2 separate tools)

In each case, the tool provides a candidate list of items that are available for transfer out of one branch to another. The items listed are all dead in the donating branch, and are also not grubby (collectionHQ ensure that the number of circulations each item has had is suitably low).

You should also start weeding dead and grubby material from shelves. The weeding tools that help you to do this are:

- Dead Items Summary and Removal tools
- Grubby Items Summary and Removal tools

You may decide to work on a particular set of collections at a time, to make the task more manageable.

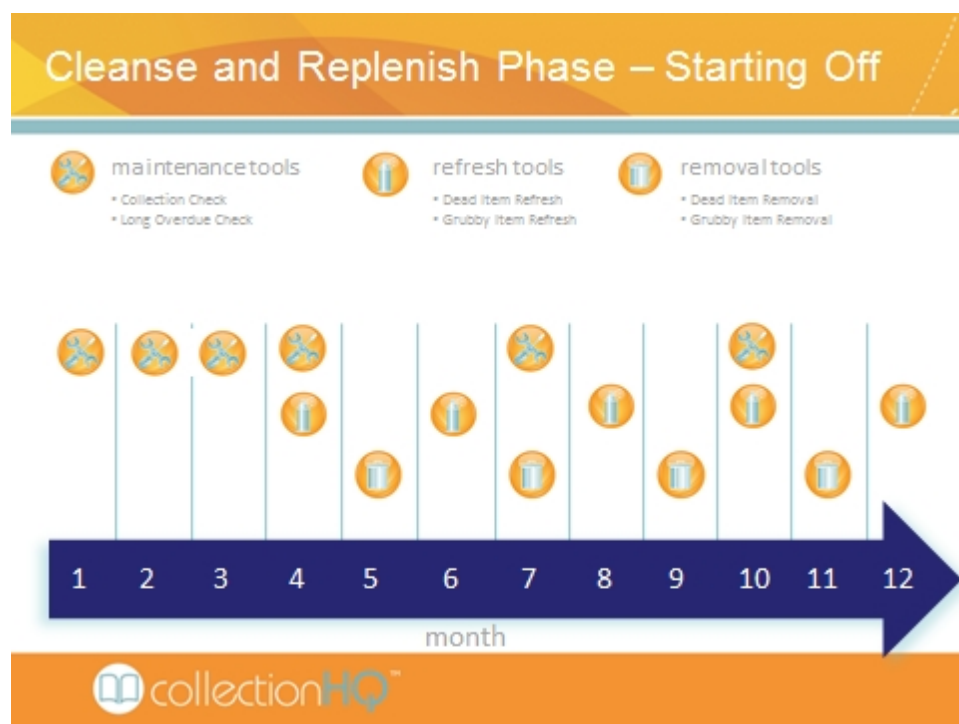
For a particular collection (or group of collections), always use the Grubby Items Refresh tool one month before the Removal (i.e weeding) tools.

Appendix 1 contains information that guides you through the various phases of activity involved in running the collectionHQ tools. In particular, the diagrams show the order in which you should run the tools and the approximate frequency.

Appendix

Starting Off – Cleanse and Replenish

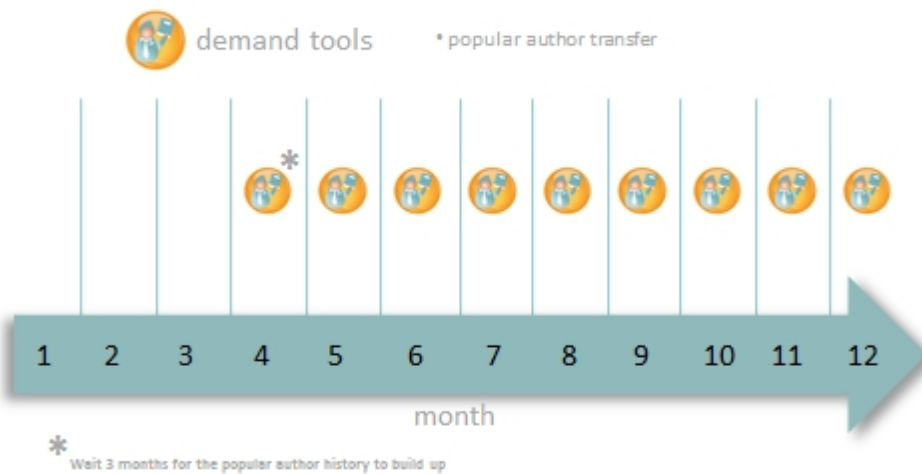
The diagram below shows you the order and frequency with which you should consider running the tools when you start off with collectionHQ. The time period of 12 months depicted at the bottom is shown as an example only – for your library system this early phase of activity may last less or more than 12 months. We call this early phase the 'Cleanse and Replenish' phase.



Meeting Popular Demand for Fiction

At the same time, make sure that you are running the Popular Author Transfer tool monthly to ensure that the most popular fiction authors in each branch have as much material on the shelves to meet demand as possible. Wait 3 months after going live with collectionHQ before using this tool so that collectionHQ has a chance to build up a picture of the current most popular authors in each branch. You should use this tool monthly on an ongoing basis – don't stop.

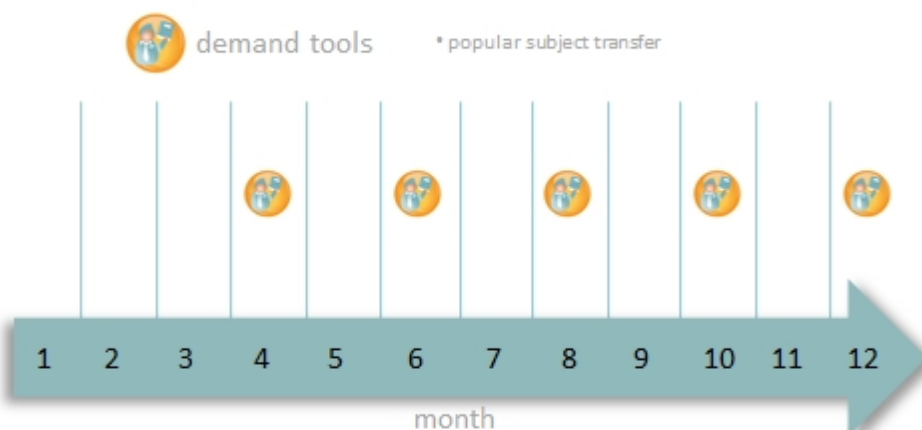
Meeting Popular Demand for Fiction



Meeting Popular Demand for Non-Fiction

During this first phase, run the Popular Subject Transfer tool to ensure that the most popular non-fiction subjects in each branch have as much material on the shelves to meet demand as possible. Because non-fiction is inherently different to fiction in the way it is read and used, running this every 2 months is sufficient. You should use this tool on an ongoing basis – don't stop.


Meet Popular Demand for Non-fiction



Post Cleanse and Replenish – Consolidate and Improve

Once the Cleanse and Replenish phase has been completed, and the worst offending dead and grubby material has been dealt with, the Consolidate and Improve phase starts. This is an ongoing activity during which you work towards achieving your optimum level of collection performance. Once this is achieved, and this may take some time, you continue to use collectionHQ on an ongoing basis to maintain that level of collection performance. The frequency of running the tools may drop slightly once the target levels of performance are met. Keep using the Maintenance Tools to keep the catalog clean.

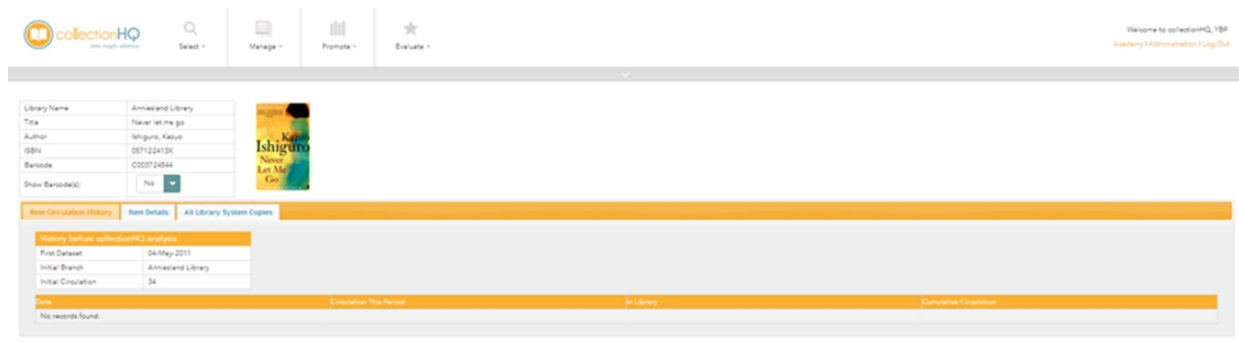


 It is also important to use the tools in the Selection Module on an ongoing basis. Cleansing the catalog and weeding the shelves of dead material is instrumental in improving the relevance of the collections so that they are in line with customers' needs. However, if the wrong material is purchased moving forward, it is quite possible that all of this hard work will be undone, as much of the newly purchased material may quickly become dead if it is not purchased based on evidence of demand. Using the Selection Module helps you to break out of this cycle, and ensures you get maximum value from your materials budget.

Features

Barcodes

In all collectionHQ action plans, the field 'barcode' will be displayed as a hyperlink. By following this hyperlink, a new 'Information' window will be displayed on top of the main collectionHQ screen which will show the circulation history for the selected item.



This window displays the circulation (issues) that the selected item has achieved during each of the dataset periods that collectionHQ has recorded. In addition to this, the cumulative circulation of the item is displayed as well as the last circulation date.

A tabbed selection pane has three options. These are:


- Item Circulation History - full circulation history of the current item
- Item Details - full details from the collectionHQ bibliographic reference database
- All Library System Copies - a summary of circulation across all library branches

Item Circulation History

When the 'Item Circulation History' link is selected, the topmost window will show the details as displayed in the above screenshot.

Item Details

When the 'Item Details' link is selected, the topmost window will show a screen similar to the one below. This is based on Bibliographic data from the collectionHQ database which is updated every month. Note that if the 'Item Details' link is not enabled, this means that no data is available to show.

Library Name	Amnieland Library	
Title	Never let me go	
Author	Ishiguro, Kazuo	
ISBN	0071224135	
Barcode	000724044	
Show Barcode(s)	No	

Item Circulation History			Item Details			All Library System Copies		
General Details Fiction Non-Fiction: Fiction EAN: 9780071224135 Format: Classic Fiction (pre 1945) Audience: Adult Illustrated: No			Publication Details Publisher Name: Faber Print Status: Publisher List Price: Publication Date: 2008 Edition Number:			Dimensions Height: Weight: Length: Width:		
List of Authors/Contributors Author Name: Kazuo Ishiguro			Series Details Series Title: Series Volume No:			Target Ages Minimum Age: Maximum Age:		
Categorifications Dewey: 823.914 BIC: Classic Fiction (pre 1945) BISAC: FICTION / General Lcc:								

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All Library System Copies

When the 'All Library System Copies' link is selected, the topmost window will show a screen similar to the one below. This displays other copies of this item (based on items with the same ISBN) that are present in the holdings of other library branches in the same library system.

Library Name	Amnieland Library	
Title	Never let me go	
Author	Ishiguro, Kazuo	
ISBN	0071224135	
Barcode	000724044	
Show Barcode(s)	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	

Item Circulation History		Item Details		All Library System Copies	
Branch Name	Barcode	Cumulative Circulation	Last Use Date	Link	
Amnieland Library	000724044	34	03-Aug-2009	view history	
Elder Park Library	000724243	46	20-Aug-2013	view history	
Osamhill Library	000724442	19	23-Aug-2007	view history	

This window lists:

- the library branches that have copies of this ISBN
- the barcode of the item
- the cumulative circulation of the item
- the last use date of the item
- a link that will navigate back to the Circulation History screen, this time for the selected item in the other library branch location

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Drag and Drop Columns

The Drag and Drop Columns feature allows you to create a customized view of an action

plan or summary. This enables you to focus on the data you're interested in and to specify the order in which you view it. There are also adjustable column margins.

If you wish to move a column to a different place in the action plan or summary, simply click on the column header and drag and drop it onto a different area of the report.

To hide a column:

- Hover over the column header that you wish to remove
- Select the column header and drag to the area titled **"Drag Columns Above Here"**
- When you release the cursor, the column header that you removed will appear in the area titled **"Drag Columns Below Here"**

Change Report Parameters and re-run report

Hidden Columns

Drag Columns Below Here

Drag Columns Above Here

Layout: - unsaved changes

Report Layout Options

Default

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	Collection Total	1 Items To Check	Items To Check (%)
Picture Book [JF]	138701	2709	1.9%
Fiction [AF]	105303	2008	1.9%
Large Print Fiction [AF]	22147	1065	4.8%
Mystery [AF]	29297	852	2.9%
Children's Fiction [JF]	58546	401	0.6%
Picture Book Reader [JF]	60174	271	0.4%
Audio Books [AF]	22347	263	1.1%
Fiction Foreign Language [AF]	2038	197	9.6%
Picture Book Foreign Language [JF]	2137	189	8.8%
Picture Book Christmas [JF]	10385	152	1.4%
Paper [AF]	6718	132	1.9%
Fantasy [AF]	8129	109	1.3%
Science Fiction [AF]	5343	100	1.8%
Children's 1st Chapter Book [JF]	30887	81	0.2%
Children's Fantasy [JF]	12800	62	0.4%
Picture Book Jewish Holiday [JF]	776	57	7.3%
Children's Fiction Foreign Language [JF]	531	53	9.9%
Picture Book Easter [JF]	2411	45	1.8%
Teen Fiction [TF]	19642	42	0.2%
Large Print Mystery [AF]	1292	41	3.1%

Change Report Parameters and re-run report

Hidden Columns

Drag Columns Below Here

Drag Columns Above Here

Layout: - unsaved changes

Report Layout Options

Default

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	1 Collection Total	Items To Check	Items To Check (%)
Large Print Science Fiction [AF]	11	2	18.1%
Children's African American [JF]	75	9	12%
Picture Book Big Book [JF]	86	1	1.1%
Picture Book Kwanzae [JF]	101	1	0.9%
Large Print Western [AF]	119	15	12.6%
Teen Large Print [TF]	143	0	0%
Large Print African American [AF]	476	11	2.3%
Children's Fiction Foreign Language [JF]	531	53	9.9%
Picture Book Pop Up [JF]	536	4	0.7%
Picture Book St. Patrick's Day [JF]	641	5	0.7%
Picture Book Jewish Holiday [JF]	776	57	7.3%
Science Fiction Audio Book [AF]	782	4	0.5%
Picture Book Shapes [JF]	813	9	1.1%
Teen Mystery [TF]	864	3	0.3%
Paper Western [AF]	884	8	0.9%
Horror Audio Book [AF]	884	6	0.6%
Western [AF]	1036	31	2.9%
Children's Star Wars [JF]	1037	2	0.1%
Picture Book Colors [JF]	1041	7	0.6%
Fantasy Audio Book [AF]	1229	10	0.8%

Change Report Parameters and re-run report

Hidden Columns

Drag Columns Below Here

Drag Columns Above Here

Items To Check (%)



Layout: - unsaved changes

Report Layout Options

Default

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	1 Collection Total	Items To Check	Items To Check (%)
Large Print Science Fiction [AF]	11	2	18.1%
Children's African American [JF]	75	9	12%
Picture Book Big Book [JF]	86	1	1.1%
Picture Book Kwanzaa [JF]	101	1	0.9%
Large Print Western [AF]	119	15	12.6%
Teen Large Print [TF]	143	0	0%
Large Print African American [AF]	476	11	2.3%
Children's Fiction Foreign Language [JF]	531	53	9.9%
Picture Book Pop Up [JF]	536	4	0.7%
Picture Book St. Patrick's Day [JF]	641	5	0.7%
Picture Book Jewish Holiday [JF]	776	57	7.3%
Science Fiction Audio Book [AF]	782	4	0.5%
Picture Book Shapes [JF]	813	9	1.1%
Teen Mystery [TF]	864	3	0.3%
Paper Western [AF]	884	8	0.9%
Horror Audio Book [AF]	884	6	0.6%
Western [AF]	1036	31	2.9%
Children's Star Wars [JF]	1037	2	0.1%
Picture Book Colors [JF]	1041	7	0.6%
Fantasy Audio Book [AF]	1229	10	0.8%

Change Report Parameters and re-run report

Hidden Columns

Drag Columns Below Here

Items To Check (%)

Drag Columns Above Here

Layout: - unsaved changes
Report Layout Options
Default

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	1 Collection Total	Items To Check
Large Print Science Fiction [AF]	11	2
Children's African American [JF]	75	9
Picture Book Big Book [JF]	86	1
Picture Book Kwanzaa [JF]	101	1
Large Print Western [AF]	119	15
Teen Large Print [TF]	143	0
Large Print African American [AF]	476	11
Children's Fiction Foreign Language [JF]	531	53
Picture Book Pop Up [JF]	536	4
Picture Book St. Patrick's Day [JF]	641	5
Picture Book Jewish Holiday [JF]	776	57
Science Fiction Audio Book [AF]	782	4
Picture Book Shapes [JF]	813	9
Teen Mystery [TF]	864	3
Paper Western [AF]	884	8
Horror Audio Book [AF]	884	6
Western [AF]	1036	31
Children's Star Wars [JF]	1037	2
Picture Book Colors [JF]	1041	7
Fantasy Audio Book [AF]	1229	10

To add a column:

- View the available column headers under the section "Hidden Columns"
- Select the addition button to the right of the column header you wish to add
- When you release the cursor, the column header that you added will appear adjacent to the active columns of the tool set

Change Report Parameters and re-run report

Hidden Columns

Drag Columns Below Here

Items To Check (%)

Drag Columns Above Here

Layout: - unsaved changes

Report Layout Options

Default

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	1 Collection Total	Items To Check
Large Print Science Fiction [AF]	11	2
Children's African American [JF]	75	9
Picture Book Big Book [JF]	86	1
Picture Book Kwanzaa [JF]	101	1
Large Print Western [AF]	119	15
Teen Large Print [TF]	143	0
Large Print African American [AF]	476	11
Children's Fiction Foreign Language [JF]	531	53
Picture Book Pop Up [JF]	536	4
Picture Book St. Patrick's Day [JF]	641	5
Picture Book Jewish Holiday [JF]	776	57
Science Fiction Audio Book [AF]	782	4
Picture Book Shapes [JF]	813	9
Teen Mystery [TF]	864	3
Paper Western [AF]	884	8
Horror Audio Book [AF]	884	6
Western [AF]	1036	31
Children's Star Wars [JF]	1037	2
Picture Book Colors [JF]	1041	7
Fantasy Audio Book [AF]	1229	10

42 / 55

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

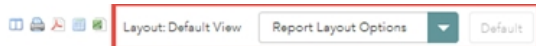
Collection	1 Collection Total	Items To Check	Items To Check (%)
Large Print Science Fiction [AF]	11	2	18.1%
Children's African American [JF]	75	9	12%
Picture Book Big Book [JF]	86	1	1.1%
Picture Book Kwanzaa [JF]	101	1	0.9%
Large Print Western [AF]	119	15	12.6%
Teen Large Print [TF]	143	0	0%
Large Print African American [AF]	476	11	2.3%
Children's Fiction Foreign Language [JF]	531	53	9.9%
Picture Book Pop Up [JF]	536	4	0.7%
Picture Book St. Patrick's Day [JF]	641	5	0.7%
Picture Book Jewish Holiday [JF]	776	57	7.3%
Science Fiction Audio Book [AF]	782	4	0.5%
Picture Book Shapes [JF]	813	9	1.1%
Teen Mystery [TF]	864	3	0.3%
Paper Western [AF]	884	8	0.9%
Horror Audio Book [AF]	884	6	0.6%
Western [AF]	1036	31	2.9%
Children's Star Wars [JF]	1037	2	0.1%
Picture Book Colors [JF]	1041	7	0.6%
Fantasy Audio Book [AF]	1229	10	0.8%

Alternatively, drag and drop the column header from the Hidden Columns section onto the action plan or summary.

Report Layout Options

Once a user has customized the information displayed and how it is displayed, collectionHQ provides the user an opportunity to save the existing layout for future use.

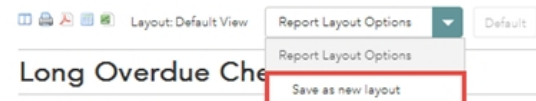
To save a new report layout, access the drop-down window entitled "Layout Options," select "Save as new layout," which will prompt the user to name the new layout. Select "Save as new layout" to ensure the layout is stored for future use.



Long Overdue Check (Fiction)

Region West Region
 Library Test Library
 Collection Children's Fiction [JF] (JF_40)
 Last Transactional File Received: 06-24-2014

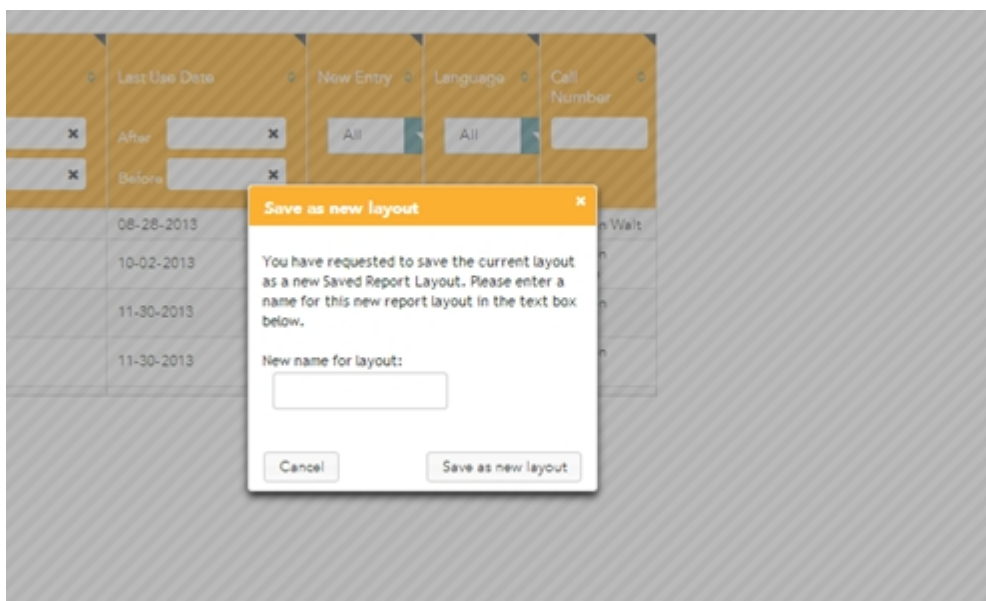
Author	Title	ISBN	Barcode	Date Added	Last Use Date	New Entry	Language	Cell Number
				After <input type="text"/> <input type="button" value="x"/> Before <input type="text"/> <input type="button" value="x"/>	After <input type="text"/> <input type="button" value="x"/> Before <input type="text"/> <input type="button" value="x"/>	All <input type="button" value="x"/>	All <input type="button" value="x"/>	<input type="text"/>
West, Tracey,	Super buddies /	9781423184085	3934065331	07-08-2013	08-28-2013			J Fiction Walt
Langan, John,	Search for safety /	9780545395489	1197293231	04-08-2013	10-02-2013			J Fiction Langan
Russell, Rachel Renée.	Dork diaries : tales from a not-so-fabulous life /	9781442426784	0558014331	04-24-2013	11-30-2013	New Entry		J Fiction Russell
Russell, Rachel Renée.	Dork diaries : tales from a not-so-happy heartbreaker /	9781442449633	0839893331	05-31-2013	11-30-2013	New Entry		J Fiction Russell



Long Overdue Check (Fiction)

Region West Region
 Library Test Library
 Collection Children's Fiction [JF] (JF_40)
 Last Transactional File Received: 06-24-2014

Author	Title	ISBN	Barcode	Date Added	Last Use Date	New Entry	Language	Cell Number
				After <input type="text"/> <input type="button" value="x"/> Before <input type="text"/> <input type="button" value="x"/>	After <input type="text"/> <input type="button" value="x"/> Before <input type="text"/> <input type="button" value="x"/>	All <input type="button" value="x"/>	All <input type="button" value="x"/>	<input type="text"/>
West, Tracey,	Super buddies /	9781423184085	3934065331	07-08-2013	08-28-2013			J Fiction Walt
Langan, John,	Search for safety /	9780545395489	1197293231	04-08-2013	10-02-2013			J Fiction Langan
Russell, Rachel Renée.	Dork diaries : tales from a not-so-fabulous life /	9781442426784	0558014331	04-24-2013	11-30-2013	New Entry		J Fiction Russell
Russell, Rachel Renée.	Dork diaries : tales from a not-so-happy heartbreaker /	9781442449633	0839893331	05-31-2013	11-30-2013	New Entry		J Fiction Russell



Layout: Children's Fiction Report Layout Options Default

Report Layout Options

- Save current layout
- Delete current layout
- Rename (and save) current layout
- Share (and save) this layout
- Save as new layout

Long Overdue Check

Region West Region
Library Test Library
Collection African American [AF] (AF_30)
Last Transactional File Received: 06-24-

Author	Title	Code	Date Added	Last Use Date	New Entry	Language	Call Number
Mason, J. D.	Drop dead, gorgeous /	9780312617286 6047975331	06-07-2013	07-24-2013			Fiction Mason
Sullivan, Leo L.	Innocent /	9780982099643 4712775331	06-05-2013	10-02-2013			Fiction Sullivan
K'wan.	Gangsta /	9780970247216 9412765331	10-09-2013	11-14-2013	New Entry		Fiction K'wan

Sorting and Filters

Filters

A search field is located in each column header. Within the search field, the user can enter a query to drill down to a specific keyword or value. Columns containing numeric values can also be filtered to display results that are greater than or less than a specified number. For example, by typing >4 into the search field only numbers greater than 4 will be displayed.

Sorting

Each column header has up and down arrows to sort the data based on the specific columns value:

- Columns with text values can sort in ascending or descending alphabetical order
- Columns with numeric values can sort in ascending or descending chronological order
- To sort the report by more than one column, use the <Ctrl> key on your keyboard while selecting the columns to sort by and in which order. The sort order displays on the appropriate columns as 1, 2, 3 etc.

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	Collection Total	1 Items To Check	Items To Check (%)
Picture Book [JF]	138701	2709	1.9%
Fiction [AF]	105303	2008	1.9%
Large Print Fiction [AF]	22147	1065	4.8%
Mystery [AF]	29297	852	2.9%
Children's Fiction [JF]	58546	401	0.6%
Picture Book Reader [JF]	60174	271	0.4%
Audio Books [AF]	22347	263	1.1%
Fiction Foreign Language [AF]	2038	197	9.6%
Picture Book Foreign Language [JF]	2137	189	8.8%
Picture Book Christmas [JF]	10385	152	1.4%
Paper [AF]	6718	132	1.9%
Fantasy [AF]	8129	109	1.3%
Science Fiction [AF]	5343	100	1.8%
Children's 1st Chapter Book [JF]	30887	81	0.2%
Children's Fantasy [JF]	12800	62	0.4%
Picture Book Jewish Holiday [JF]	776	57	7.3%
Children's Fiction Foreign Language [JF]	531	53	9.9%
Picture Book Easter [JF]	2411	45	1.8%
Teen Fiction [TF]	19642	42	0.2%
Large Print Mystery [AF]	1292	41	3.1%

System Wide Collection Check Summary (Fiction)

Audience All

Overall Check Total 9391

Overall Item Total 676907

Collection	Collection Total	1 Items To Check	Items To Check (%)
<input type="text"/>	<input type="text"/>	<input type="text" value="10"/>	<input type="text"/>
Fantasy Audio Book [AF]	1229	10	0.8%
Picture Book Thanksgiving [JF]	1989	10	0.5%

^4 Collection	Total Items	^3 Total Circulation	^2 Relative Items(%)	^1 Circulation(%)	Collection Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All <input type="text"/>
Children's Display - Book - Early	(all libraries) 1	20	0.00	0.01	
Children's Kits	(all libraries) 7	37	0.02	0.01	
Children's Holiday Books - Juvenile	(all libraries) 13	32	0.03	0.01	
Children's Fiction - Teen	(all libraries) 12	33	0.03	0.01	
Large Print - Juvenile Fiction	(all libraries) 15	90	0.04	0.03	
Large Print - Science Fiction	(all libraries) 10	56	0.02	0.04	
Teen Series	(all libraries) 11	15	0.10	0.04	
Children's Fiction	(all libraries) 13	160	0.03	0.05	
Children's Display - Book	(all libraries) 15	257	0.04	0.08	
Children's World Languages - Vietnamese	(all libraries) 381	285	0.96	0.09	OVERSTOCKED (0.87%)

Some library systems may use an Integrated Library System (ILS) that requires the use of additional 'filters' in collectionHQ. These filters are displayed as extra collectionHQ parameters, and are labeled as Filter 1, Filter 2 etc. up to a maximum of four additional filters, depending on the requirements of the particular ILS.

Further information on the use of these filters can be obtained by contacting the collectionHQ support team at support@collectionHQ.com.

Table of Contents

Every summary and action plan produced by collectionHQ allows the user to navigate quickly to a particular section. This can be enabled by clicking on the Table of Contents icon at the top of the action plan as shown below:

Long Overdue Check (Fiction)

Region West Region
Library Test Library
Collection African American [AF] (AF_30)
Last Transactional File Received: 06-24-2014

Author	Title	ISBN	Barcode	Date Added	Last Use Date	New Entry	Language	Call Number
				After <input type="text"/> <input type="button" value="x"/> Before <input type="text"/> <input type="button" value="x"/>	After <input type="text"/> <input type="button" value="x"/> Before <input type="text"/> <input type="button" value="x"/>	All <input type="button" value="x"/>	All <input type="button" value="x"/>	<input type="text"/>
Mason, J. D.	Drop dead, gorgeous /	9780312617286	6047975331	06-07-2013	07-24-2013			Fiction Mason
Sullivan, Leo L.	Innocent /	9780982099643	4712775331	06-05-2013	10-02-2013			Fiction Sullivan
K'wan.	Gangsta /	9780970247216	9412765331	10-09-2013	11-14-2013	New Entry		Fiction K'wan

By doing so, a pane appears on the left side of the window which contains groupings specific to the action plan being run. This is illustrated below:

Table of Contents

- African American [AF] (AF_30)
- Fiction [AF] (AF_5)
 - Large Print African American [AF] (AF_86)
 - Paperback African American [AF] (AF_32)
 - Children's 1st Chapter Book [JF] (JF_35)
 - Children's Fantasy [JF] (JF_39)
 - Children's Fiction [JF] (JF_40)
 - Children's Star Wars [JF] (JF_53)
 - Picture Book Board Book [JE]

(Fiction)

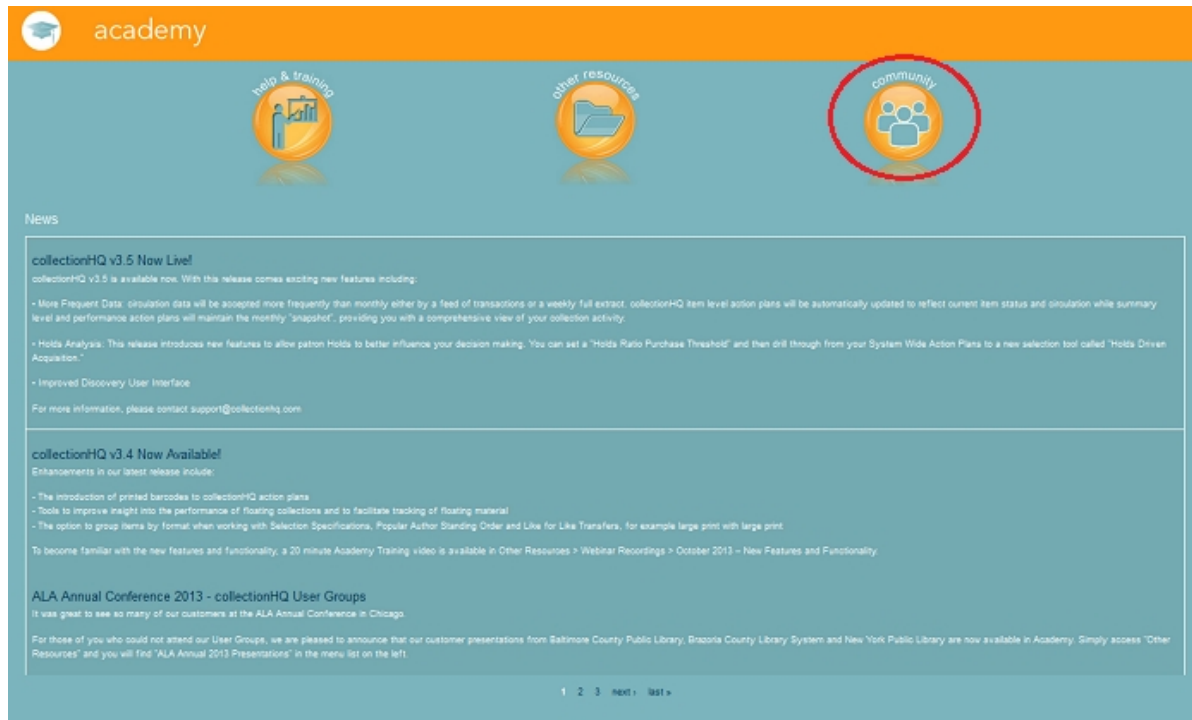
	ISBN	Barcode	Date Added	Last Use Date	New Entry	Language	Call Number
After			After		All	All	
Before			Before				
eous /	9780312617286	6047975331	06-07-2013	07-24-2013			Fiction Mason
	9780982099643	4712775331	06-05-2013	10-02-2013			Fiction Sullivan
	9780970247216	9412765331	10-09-2013	11-14-2013	New Entry		Fiction K'wan

These groupings act as a table of contents for the action plan, and clicking on a particular grouping will either expand it further, or enable the user to jump straight to that section of the action plan. This makes the navigation through large action plans much faster. For example, the user can navigate directly to a particular collection code, and then a library branch within that code.

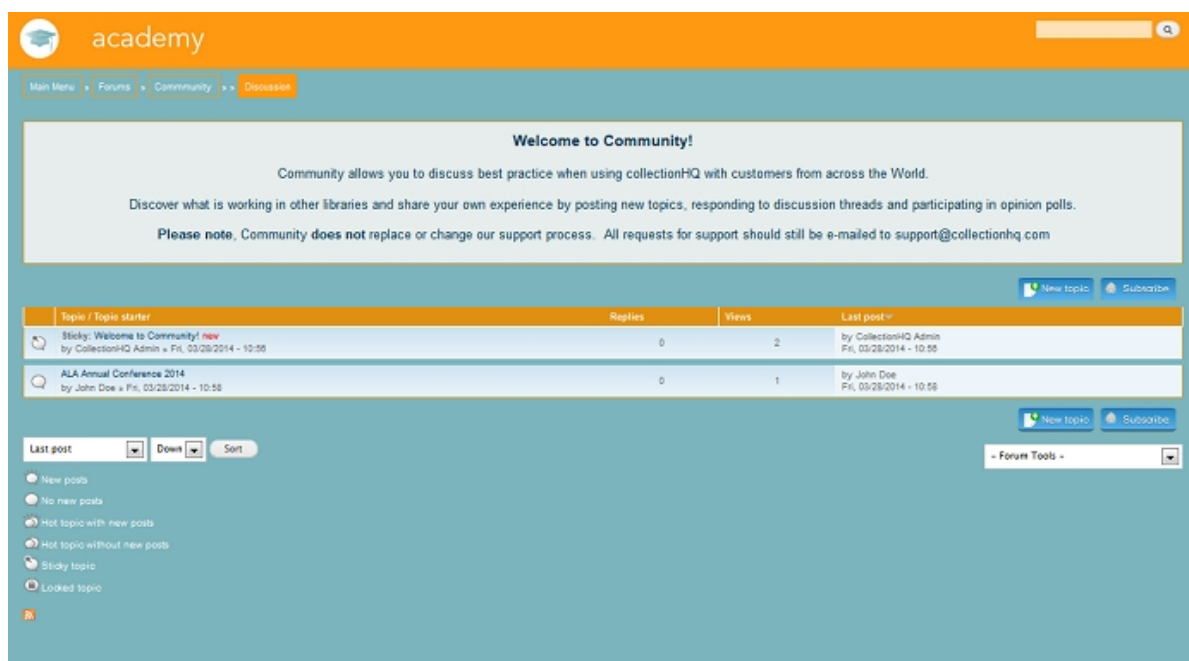
Community

Getting to Community

To access Community, you must first navigate to Academy from the orb within collectionHQ. Once you reach the Academy home page, click on the **community** icon, as shown below. This will bring you to the main discussion forum.



Main Forum Page



Topics

On this page you will see the list of topics that have been created by other users of Community. The topic lists are separated into two sections – sticky topics and otherwise. Sticky topics can be created by moderators, and will contain important information for other users, whether that is an announcement, or simply a useful topic for everyone to read. These will always be shown above the rest of the topics.

Normal topics will be shown below the sticky topics, and by default are sorted in descending order of the time of the last post. For both types of topics, the number of replies and views are shown in their own columns, along with details on who created it and who made the last post and when.

Sorting

The topic list can be sorted either by clicking on the column header, or selecting your desired sorting options from the drop-down boxes on the bottom left of the screen.

Forum Tools

You can filter the list of topics using the menu on the bottom right of the screen. This allows you to show all new, unanswered or active posts, and also mark every post as read. Please note that any new posts since the last time you visited Community will be indicated in red, as you can see in the screenshot.

Subscribing

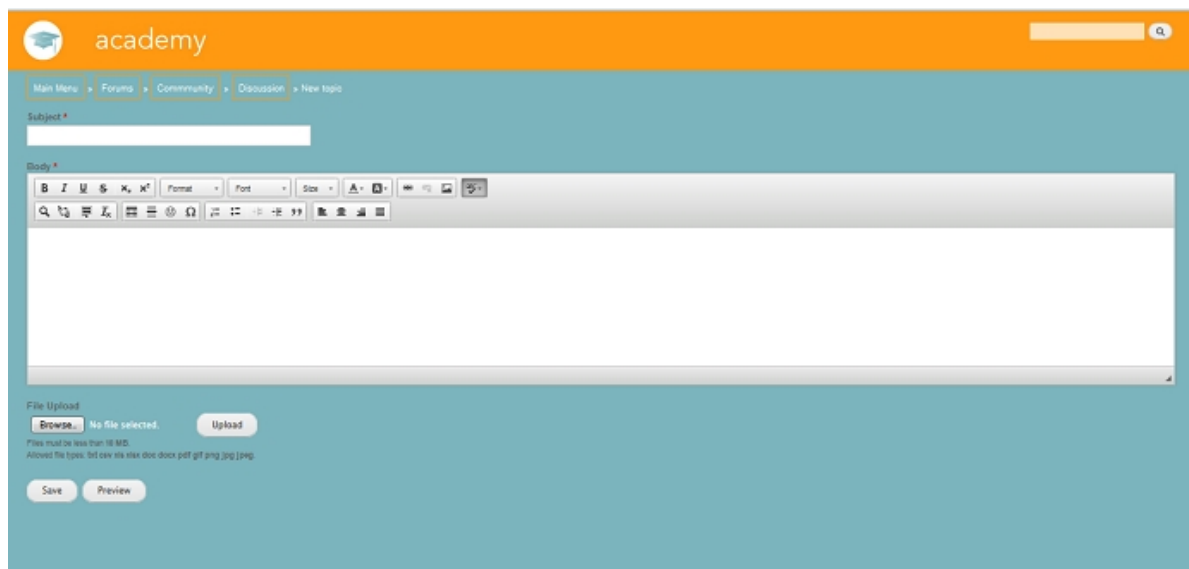
It is possible to subscribe to a forum and receive notifications whenever there are posts or topics made on it. By clicking the subscribe button and filling in the options it brings up, you will then be notified by e-mail whenever a forum topic is created or updated. Please note that if you subscribe at this level, you will receive a lot of e-mails depending on activity.

New Topic

To create your own topic, click the “New Topic” button. For more information on this function,

visit the section of this page on creating topics.

New Topic

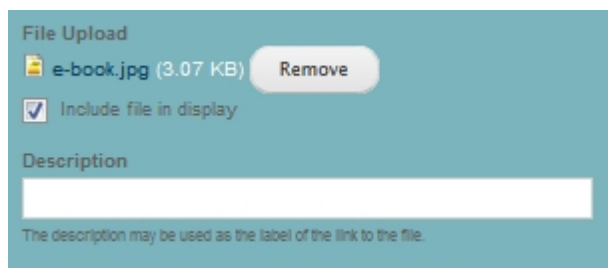
The screenshot shows the 'New Topic' form in the 'academy' forum. At the top, there's an orange header with the 'academy' logo and a search bar. Below the header, a navigation bar contains links: 'Main Menu', 'Forums', 'Community', 'Discussion', and 'New topic'. The form itself has a 'Subject' field and a 'Body' field. The 'Body' field has a rich text editor toolbar with options for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, image, video, and code. Below the text area is a 'File Upload' section with a 'Browse' button, a 'No file selected.' message, and an 'Upload' button. A note states: 'Files must be less than 10 MB. Allowed file types: txt, csv, xls, xlsx, doc, docx, pdf, ppt, png, jpg, jpeg.' At the bottom of the form are 'Save' and 'Preview' buttons.

This screen allows you to start a new topic to be posted for other users to see. You are required to provide a subject and a body for your topic, and in the case of the latter, you can use the toolbar to format your text in the way you want it.

File Upload

It is also possible – but not required – to upload a file with your topic. This can be useful if you are wanting to share a useful document, or further explain your point with a diagram. Most common file types are allowed to be uploaded, both images and files.

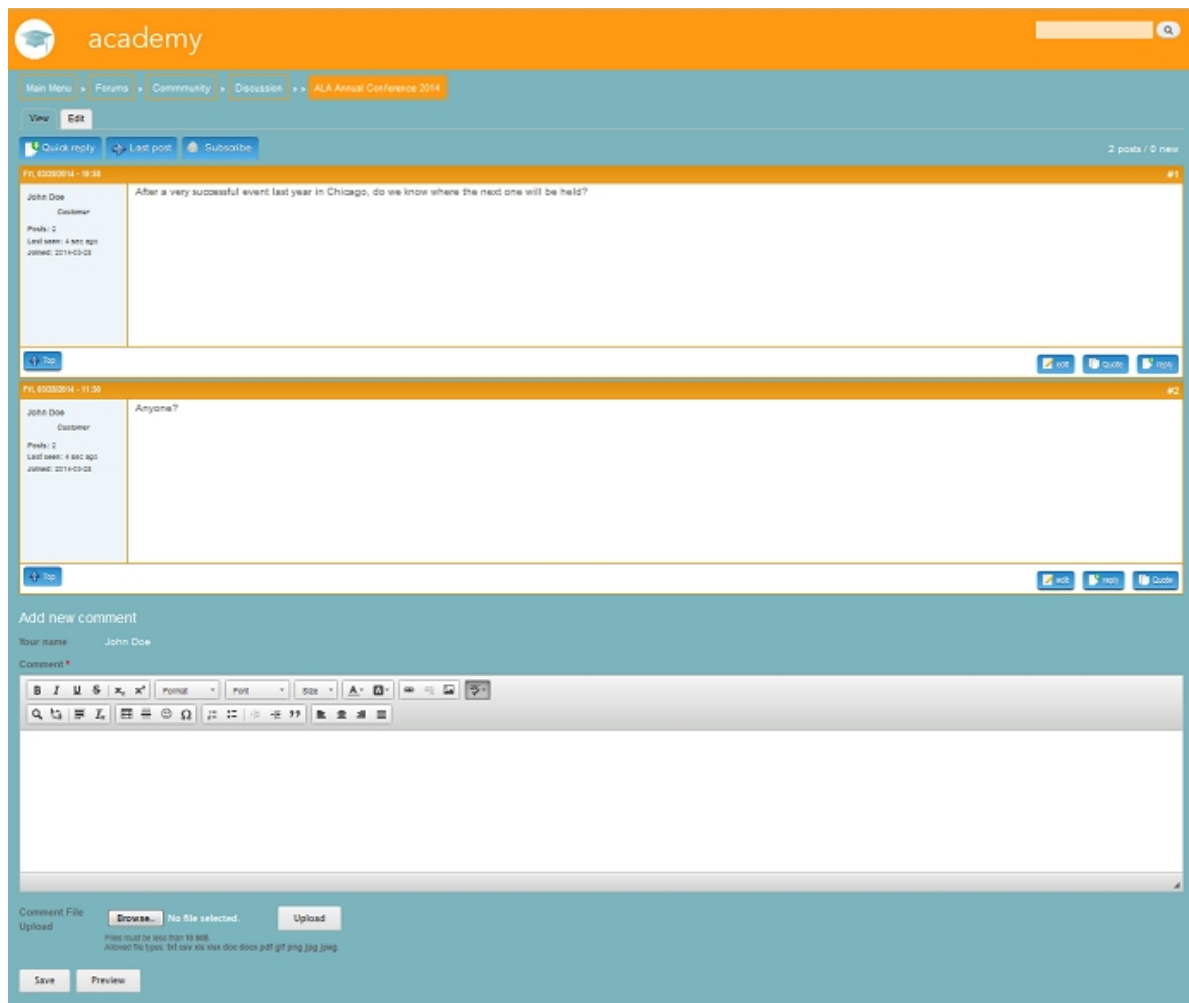
To upload a file, click browse and find the file you wish to upload. Once selected, click upload to add it to your post. If successful, your file upload screen will look similar to what is shown below. You can add a description to go along with the file, but again this is not required. If you have uploaded the wrong file, click Remove and you can start the process again.

The screenshot shows the file upload confirmation screen. It has a 'File Upload' title. Below it, a file icon is shown next to the text 'e-book.jpg (3.07 KB)', followed by a 'Remove' button. There is a checked checkbox labeled 'Include file in display'. Below this is a 'Description' label and a text input field. A small note at the bottom says: 'The description may be used as the label of the link to the file.'

Posting a new Topic

Once you are happy with your topic, click Save to post it publicly. Please remember that once it is posted, it can only be deleted by a moderator. You can edit it yourself at a later date if there are any problems though. You can also preview your topic to see how it will look once posted.

Viewing a Topic



Shown above is the topic screen which gives a chronological view of all the posts added to it. Every topic will be laid out in the same way, with the option to add a new comment coming at the very bottom of the page.

Your Own Topics and Replies

The screenshot shown above shows the view a user has of their own posts. As you can see, the option to edit is provided, as well as quoting and replying. The latter two will be outlined in a later section.

To edit your own post, simply click the edit button and make your changes in the usual way. When you are done, click save, and these changes will be made. An extra bar will be added onto your post to show that it has been edited, along with a timestamp.

General Topics and Replies

There are three ways to communicate within a topic.

- **Quoting Another User**
 - This is useful when a user has said something you want to directly reference in your reply. If they said something particularly correct that you want to expand on, or something you disagreed with, then quoting is useful to keep the conversation flowing well.
 - To perform a quote, click the Quote button on the post you wish to quote. This will pre-

populate your reply with a reference to the post, allowing you to type your message underneath.

- **Replying to Another User**

- This is similar to quoting, but does not directly reference the previous post. It will instead be added below the replied-to post. This is useful if you have a long topic with several strands of conversation. Ideally this does not happen, but in a busy forum it is easy for several different strands to break out. Replying directly to a post allows you to associate your comment directly with another.
- To reply to another post, simply click the reply button, type in your message and click save. This will add your reply just below the original post.

- **Commenting**

- This simply adds your comment to the topic without referencing any other posts.
- To comment in this manner, either go to the bottom of the page or click the Quick Reply button on the top left of the screen. This will take you to the add new comment section. Type in your message and click save to post.

Adding a Comment

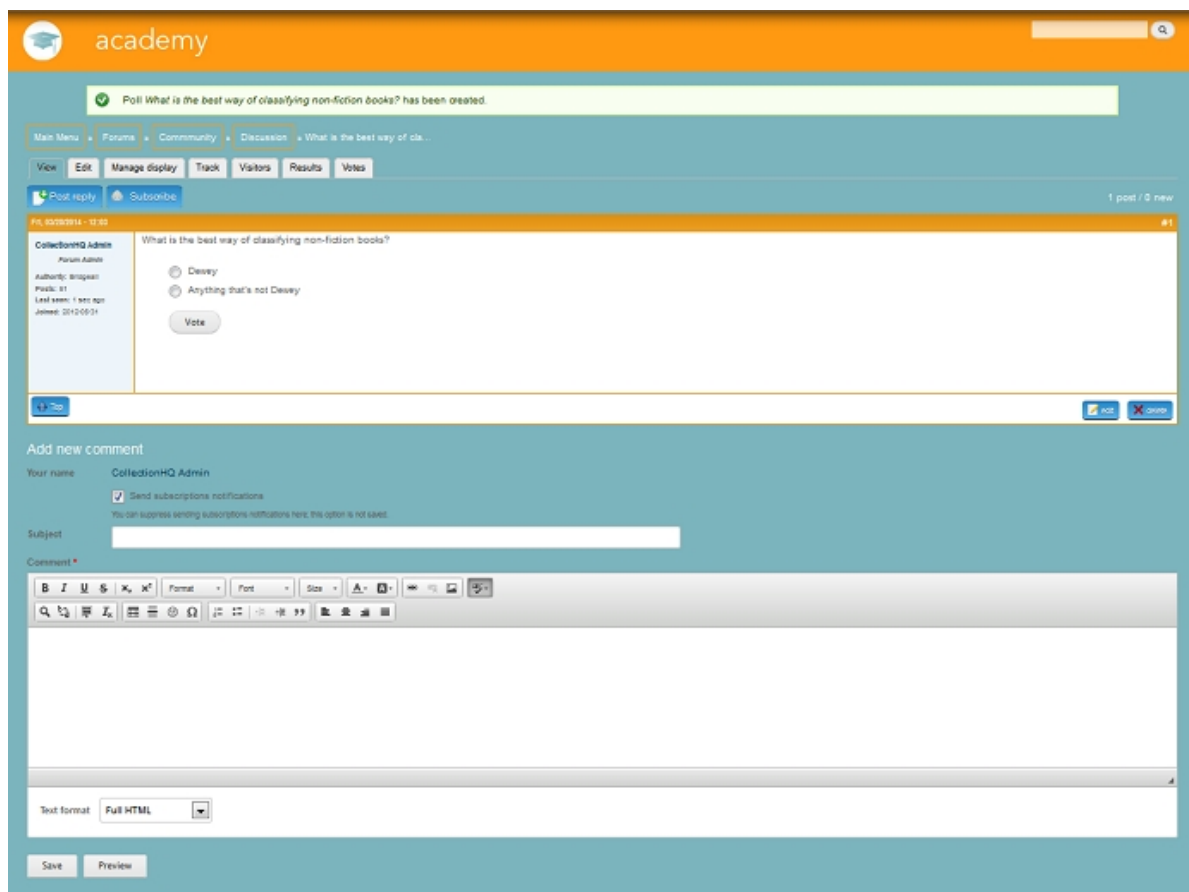
To add a comment, simply type in the body of the message, format it in the way you see fit, and then click save. You can also preview the post to see how it will look beforehand. You can also upload a file to go along with it.

Subscriptions

It is possible to subscribe to a certain topic that interests you. To do this, just click the subscribe button on the top left of the screen. This will then send you e-mail updates whenever posts are made or updated within the confines of the given topic.

Polls

Polls are another feature of Community, but cannot be created by normal users. However, you are still welcome and encouraged to vote and participate in the conversation around them. From time to time, moderators may add a poll centered around collectionHQ and its functions, to get the opinions of the users. Once a poll is accessed, you will see a screen like shown below.



Voting

To vote in the poll, simply select the radio button next to your chosen option and click vote. Your vote will now be recorded and saved, and your view will change to show a breakdown of the votes already cast. Please note that you will only be allowed to vote once in each poll. You can delete and recast your vote by clicking the Cancel your vote button.

Commenting


As well as – or instead of – voting in the poll, you can also add comments discussing the question. Adding a comment is done in the same way as explained in previous sections.

Searching

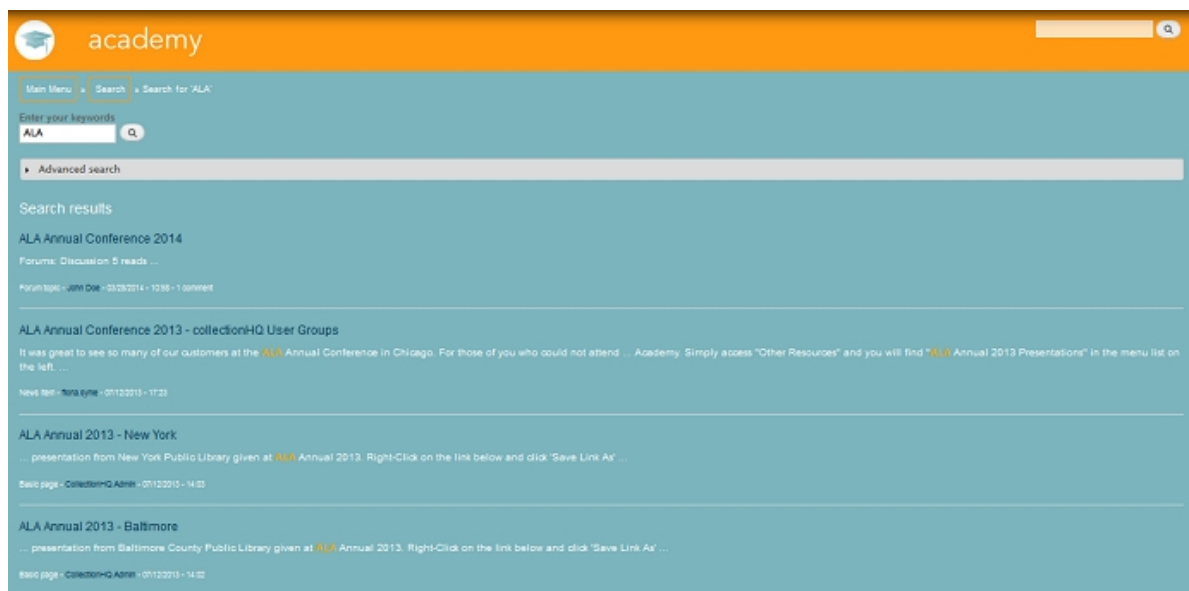
A search function has been added to Community to allow you to search for certain keywords. This is useful if you want to find out information on a certain topic, without wading through anything you're not interested in. For example, if you want to find out what people are saying about this year's ALA, you could search for the term ALA, and every comment or topic that mentions it would be returned.

The search function also works across the rest of Academy, allowing you to search the existing help pages, and news items.

Performing a Search

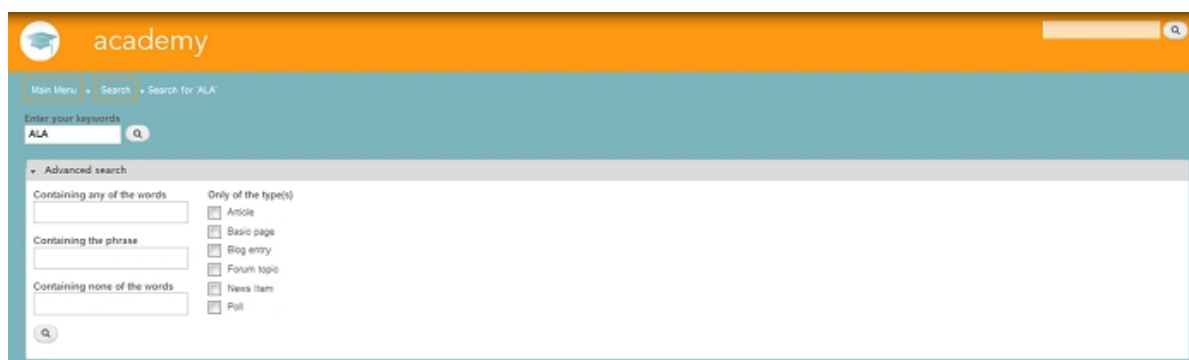
The search bar is available on any Community page, and always appears in the same place, to the far right of the academy bar on the top of the page. To perform a search, simply enter your search term and click the . This will take you to your results.

Understanding your Results



A subset of the results of a search for ALA are shown above. Our search has found a number of results, across a number of different types. First is the forum topic, which mentions ALA in its title. Then come Academy help pages and news items which both mention ALA in their body of text. In these results, the position of the match is shown and highlighted. Every match gives supplementary data on the type of the result, as well as when it was created and/or updated.

Advanced Search



It is also possible to refine your search using an Advanced Search. This allows you to search either for specific types, or for the existence – or non-existence – of words and phrases. This gives the user a little more power over their searches, and can be useful for terms that return a lot of results.

An example of using this feature may be to find any forum topic that mentions the library you work in. To do this, you would select Forum Topic as a type, and enter the name of your library in the Containing the Phrase area.