

Database Management Minutes

Tuesday, February 2, 2021

9:30 AM – 11:00 AM

1. **Call to Order by Kate Hall (Northbrook), 9:32 AM**
2. **Roll Call**

Alex Todd, Prospect Heights – joined 10:30
Arianne Carey, Niles
Linda Conn, Cary
Ann Finstad, Glencoe
Kate Hall, Northbrook
Violet Jaffe, Palatine

Sarah Kaminski, Northbrook
Karen Kee, Glenview
Jeffrey Ray, Morton Grove
Jessica Thomson, Wilmette
Guest – Debra Wischmeyer (CCS), Rebecca Malinowski (CCS; left 11:15), Sara Scodius (Northbrook)

Absent: Mollie Brumbaugh (Zion), Brian Wilson (Lincolnwood)

3. **Minutes – Approved by acclamation**
4. **Member Library Data Needs**

D. Wischmeyer reviewed the concerns of the committee expressed at the last meeting, specifically the question of item stat codes meeting member library data needs. CCS recommends that Database Management look more broadly at Polaris configuration and how well it meets member library data needs. This will help the group identify the scope of the problem, which could include:

- Current Polaris item record configuration does not provide adequate reporting options for libraries
- Libraries do not know how to access/interpret the data they need to make decisions
- Libraries are not using item fields consistently

D. Wischmeyer reviewed the plan of action. Database Management will discuss the group's data needs and perform a data inventory, and CCS will use the information to build & administer a survey on member data needs. This will help determine the root problem, at which point the group can revisit the data inventory to see if more/different data is needed to find a solution to the problem.

The group moved into discussion of the below questions; practices and responses varied by library.

What item & circulation data do you regularly use at your library & why? How Do you gather that data?

- **Fields used:** Libraries use a variety of fields to run reports. For example, at Glencoe, selectors might use item stat codes, material type and collection codes. At Northbrook, staff would typically use material type, call number, shelf location, and publication/ activity dates when running a report. Palatine is still adjusting to Polaris after migrating from Sierra, and staff rely on shelf location and Dewey ranges for reports since stat codes are not used consistently.
- **Stat Code Usage:** When it comes to stat codes, Northbrook and Niles noted that stat codes aren't typically used when reporting. Cary uses stat codes for monthly circ and discards. At

Glenview, technical services and circulation staff use stat codes for general circulation reports and to help gauge adequate collection size. Northbrook uses shelf locations for similar reports, since their shelf locations are set to be very specific. Glencoe prefers broader shelf location names for patron ease, which might not work for other CCS libraries. Since stat codes aren't patron facing and don't have any controls related to circulation, they are the most flexible item record field. Some staff use stat codes for searching and/or virtually browsing the shelves from home for collections like picture books and readers.

- **Staff Reporting Practices:** At some libraries like Glencoe, all selectors are responsible for running their own reports. At others like Cary or Palatine, reports are typically run by a department head. At Wilmette, staff are completing more training to be able to run their own reports in the future. At Morton Grove, selectors run their own reports, but escalate to their Simply Reports expert as needed if they get stuck.
- **Primary Reporting Interfaces:** Staff primarily use Simply Reports, Web Reports and Collection HQ to generate reports. Four of the libraries represented at the meeting used Collection HQ. It was noted that sometimes Simply Reports and Collection HQ data does not match up, due to differences in setup, mapping and Collection HQ categories. One benefit to Collection HQ is agreed-upon configuration that ensures everyone is using the same criteria when running reports. Helpful data from CollectionHQ that is not easily accessible via Polaris tools include:
 - Weeding reports (grubby)
 - Most popular authors
 - Top circ'ing items
 - Circulation data for withdrawn items
 - Visualizations of data
 - Publisher data
- **Web Reports:** Key reports used in Web Reports include IPLAR data and circulation numbers used for Board Reports. It was noted that it would be beneficial to know the "equation" behind the reports in Web Reports, since some staff may not understand where the data in canned reports is coming from.
- **Other reporting options:** Some staff reported using alternate methods to gather information. Examples include using spreadsheets to compile data from multiple sources (physical materials to digital materials), or record sets to monitor small subsets of collections. Staff manually update such record sets are new items are ordered.

What information do you wish you could have about your collection? Where are there data gaps?

- When staff are unable to run a specific report, it's unclear whether the data isn't being tracked by the ILS, or if it's a data literacy issue and we don't know how to get the data we are looking for. There is so much information available, it can be overwhelming at times. It may be helpful for CCS to more clearly define how fields such as Collection, Material Type, etc. should be used. Technical Services staff may have an advantage in reporting because of their familiarity with record types and structures.
- Another difficult in running reports is that it's hard to know which tool should be used to run a report.

- Additional information that would be helpful to have is a collection analysis from Simply Reports, econtent data, and groupings of data for world languages and for new/hot materials. It would also be helpful if there were defaults/standards that could be used for Simply Reports. Staff can't share reports with colleagues, so everyone is using their own parameters.

In your role, do you ever compare your library's statistics to your neighboring libraries? What would be useful to compare?

- IPLAR data, collection counts per capita, and lend/borrow rates can be helpful to compare across libraries. Circulation and collections stats and trends can also be helpful to compare with neighbors.

Debra and Rebecca will review the notes and suggestion from the group and revise the project timeline.

5. Request for Additional Item Stat Codes

The group revisited the request for additional stat codes of realistic and crime presented at the December meeting. The group discussed whether to delay approving new statistical codes until we complete our investigation into library data needs or approve now so libraries can begin collecting data. A. Finstad noted that the terms requested do encompass industry genre terms and we should help the library to gather the stats they need rather than delay a year while the group investigates. CCS could let the requesting library know that Database Management may need to do a holistic review and overhaul of item stat codes in the future pending the results of our data need investigation.

A. Finstad moved and V. Jaffe seconded to add realistic as a statistical class code.

AYES: A. Todd, A. Carey, L. Conn, A. Finstad, S. Kaminski, K. Kee, J. Ray, J. Thomson

NAYS: K. Hall

A. Finstad moved and K. Kee seconded to add crime as a statistical class code.

AYES: A. Todd, A. Carey, A. Finstad, S. Kaminski, K. Kee, J. Ray, J. Thomson

NAYS: K. Hall, L. Conn

K. Hall adjourned the meeting at 11:22 AM.