

Collection Analysis by Dewey Number and Shelving Location

Evergreen Report Template

Template Source: Item

Displayed Fields:

Item → Call Number/Volume → Call Number Label	<i>Rename to "Call No."</i>
Item → Call Number/Volume → Bibliographic Record → Simple Record Extracts → Publication Year	
Item → Copy ID (Transform = Count Distinct)	<i>Rename to "Total Copies"</i>
Item → Circulations → Circ ID (Transform = Count Distinct)	<i>Rename to "Total Circs"</i>

Base Filters:

Item → Call Number/Volume → Call Number Label	[BETWEEN]	
Item → Is Deleted	[EQUALS]	"false"
Item → Shelving Location → Name (Transform=Upper Case)	[IN LIST]	
Item → Call Number/Volume → Owning Library → Organizational Unit ID	[IN LIST]	
Item → Copy Status → ID	[NOT IN LIST]	

* When creating report, consider excluding items with the copy status of lost, damaged, missing, or discard/weed.

In Excel

1. Decide how to treat incomplete, multiple and empty date fields:

- a. Sort Column B (Pub Yr) smallest to largest.

At the top of Column B, there might be incomplete dates:

- Round to nearest decade?, or
- Replace with "n.d."?

Near the bottom of Column B, there might be multiple dates:

- If there are a few cells with multiple dates, manually edit to the preferred date.
- If there are many cells with multiple dates:
 1. In Column E, in the empty cell on the same row as the first multiple date, enter the following formula:
 =LEFT(cell ref, 4)
 Where *cell ref* is the full reference of the cell in Column B on the same row
 Ex: =LEFT(B3205,4)
 2. Still in Column E, copy the new cell and paste the formula into as many cells below it as needed so that there is now an edited date in Column E for every multiple date in Column B.

3. Copy the new edited dates in Column E and Paste → Paste Values over the multiple dates in Column B.
4. Delete the edited dates in Column E.

At the bottom of Column B, there might be empty dates:

- Enter "n.d."

2. Remove call number pre-fix and other letters from call number:

- a. Give Column E the header "Edited Call No."
- b. In E2, enter a formula using the following syntax:

```
=MID(text,start_num,num_chars)
```

In this case:

text = A2

start_num = the number of characters in the prefix plus 2 (1 for the empty space and 1 to get to the first number)

num_chars = 3 (to extract the first 3 numbers in the dewey number)

So for a call number that starts with the prefix YA, the formula would be: =MID(A2, 4, 3)

For a call number with no prefix, the formula would be: =MID(A2, 1, 3)

- c. Copy the formula in E2 and paste throughout Column E.
- d. Copy Column E and Paste → Paste Values over Column A.
- e. Delete Column E.
- f. Rename Column A "Call No."

3. Convert Edited Call Number to number format:

- a. Select Column A.
- b. Data → Text to Columns.
- c. In the pop-up window, accept the default for Step 1 and click Next.
- d. Accept the default for Step 2 and click Next.
- e. For step 3, confirm that "General" is the data format selected.
- f. Click Finish.

4. Determine age of items:

- a. Give column E the header "Age".
- b. Enter the following formula into E2:

```
=IF(SUM(2011-B2)>=20,"4. >= 20 yrs.old",IF(AND(2011-B2<=19,2011-B2>=10),"3. 10-19 yrs.old",IF(AND(2011-B2<=9,2011-B2>=5),"2. 9-5 yrs. old","1. less than 5 yrs. old")))
```

- c. Copy E2 and paste the formula throughout column E
- d. Sort Column E in ascending order: Data → Sort & Filter → Z -A
- e. Fix all fields with “#VALUE!” by entering “n.d” instead of the formula. (The “#VALUE!” occurs because the publication date is “n.d”, instead of a number as required by the formula.)
- f. Copy Column E and Paste → Paste Values to remove the formula and leave the age value instead.

5. Create PivotTable:

- a. Select all the cells with data, including the headers but do not include blank cells:
 - i. Select cell A1.
 - ii. Click Ctrl +Shift+End
- b. Click Insert → PivotTable
- c. Click OK in pop-up window to accept default setting

d. Insert Labels and Values:

- i. Insert Row Labels:
 - Call No.
 - Age
- ii. Insert Values :
 - Total Copies
 - Total Circs
- iii. Make sure that the field settings for the 2 values are set to Sum.
- iv. Re-insert “Total Copies” into Values:
 1. Change Field Settings to Sum and then “Show Value As” to “% of Total”.
 2. Rename fields to reflect “% of All Copies”.
- v. Re-insert “Total Circs.” into Values:
 1. Change Field Settings to Sum and then “Show Value As” to “% of Total”.
 2. Rename fields to reflect “% of Total Circs”.
- vi. Insert calculated field “Circs/Item”:
 1. Select any cell in PivotTable.
 2. PivotTable Tools → Options → Tools → Formulas → Calculated Field
 3. Name field “Circs/Item”.
 4. In formula, enter the following by clicking on the appropriate fields:
=‘Circ ID’/‘Copy ID’
 5. Click Ok.
 6. Rename Column “Circs/Item” and format number to remove excessive decimal places.

If you have Excel 2010....

- vii. Re-insert “Total Copies” into Values:
 1. Change Field Settings to Sum and then “Show Value As” to “% of Parent Total”.
 2. Rename fields to reflect “% of Subgroup Copies”.
- viii. Re-insert “Total Circs.” into Values:

1. Change Field Settings to Sum and then “Show Value As” to “% of Parent Total”.
 2. Rename fields to reflect “% of Subgroup Circs”.
- e. **Group Call Numbers into Dewey range:**
- i. Select header cell for “Call No.”.
 - ii. PivotTable Tools → Options → Group → Group Field
 - iii. Set Starting Value to “0”.
 - iv. Set Ending Value to 999.
 - v. Set by to either 10 or 100.
 - vi. Click OK.
- f. **Confirm subtotal for rows are showing when table is expanded:**
- i. Select header cell for “Call No.”.
 - ii. Right Click and make sure “Subtotal Call No.” is checked.
- g. **Collapse Edited Call No. field:**
- i. Select header cell for “Call No.”.
 - ii. PivotTable Tools → Options → Active Field → Collapse Entire Field
- h. **Beautify table:**
- i. Select table design (PivotTable Tools → Design → PivotTable Styles)
 - ii. Use color scales to quickly identify high and low values in particular columns:
 1. Select all the cells in a column.
 2. Home → Conditional Formatting → Color Scales

Don't forget to take advantage of the flexibility of PivotTables! You can view data differently by switching the order of “Age” and “Call No.” by either clicking and dragging the field names directly in the table or by switching the order of the Row Labels in the PivotTable Field List.