Decision Center

Making educated Collection Management choices
Decision Center

- Decision Center is a Comprehensive collection management and analytics solution that provides library staff with dynamic tools to report, analyze, and make action-oriented decisions and recommendations regarding collection management.
Decision Center

- Decision Center is a package of reports that aid library staff with analysis of the collection, and usage of the collection, using record and transaction data.
- Decision Center helps libraries match supply and demand to deliver optimized service.
Decision Center
Decision Center - getting started

- Logging in -
  - Point your browser to: https://dc-mhud.iii.com/
  - Username and Password: your Sierra login
Decision Center - Creating Reports

- Creating and running a report
  - Evaluation
  - Development
  - Balancing
  - Maintenance

- Over 150 reports…
Decision Center - Creating Reports

- Creating and running a report
  - Evaluation
  - Development
  - Balancing
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Decision Center - Creating Reports

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Decision Center - Creating Reports

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Decision Center - Creating Reports

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  - Maintenance
Decision Center - Creating Reports

- Creating and running a report
  - Evaluation
  - Development
  - Balancing
  - Maintenance
  - Over 150 reports...?
Decision Center - Creating Reports

- Creating and running a report
- Choose a category on Decision Center’s Tools menu. Categories include:
  - Evaluation
  - Development
  - Balancing
  - Maintenance
Creating and running a report

Choose a *category* on Decision Center’s *Tools* menu. Categories include:
- Evaluation
- Development
- Balancing
- Maintenance
Creating and running a report

Choose the link to the report you want to use.
Creating and running a report

Choose the *link to the report* you want to use.

Low Circulation Weeding
Decision Center - Creating Reports

- Creating and running a report
- Configure the initial filters. The available filters appear on the reference page for each tool or report.
  - All filters enable you to set the values you prefer, and most include a default value. You set some values directly in a text box and others by editing a list of values.
Creating and running a report

Configure the initial filters. The available filters appear on the reference page for each tool or report.

For most filters, the edit link opens a dialog box with Selected and Available lists that help you identify valid values recognized by your system. Values that appear in the Selected list appear in the results. Drag and drop entries between the Selected and Available lists to configure the included values.
Creating and running a report

Configure the initial filters. The available filters appear on the reference page for each tool or report.

For most filters, the edit link opens a dialog box with Selected and Available lists that help you identify valid values recognized by your system. Values that appear in the Selected list appear in the results. Drag and drop entries between the Selected and Available lists to configure the included values.
Creating and running a report
Decision Center - Creating Reports

- Creating and running a report

- Values that appear in the Selected list appear in the results.

- Drag and drop entries between the Selected and Available lists to configure the included values.
Creating and running a report

- Values that appear in the **Selected** list appear in the results.
- Drag and drop entries between the **Selected** and **Available** lists to configure the included values.
Creating and running a report

- Values that appear in the Selected list appear in the results.
- Drag and drop entries between the Selected and Available lists to configure the included values.
Decision Center - Creating Reports

- Creating and running a report

- Choose **Go**. Decision Center runs the report.
Decision Center - Creating Reports

![Image of Decision Center interface](image-url)

The Decision Center interface allows users to create reports based on various criteria such as location, shelf location, physical format, record creation date, collection, call number ranges, and more. The interface also includes filters for last check-in date, list price, and demand in the branch or system. The table shows a sample of items with columns for item location, shelf location, call number, barcode, title, author, total copies, circulation status, and other related information.
Creating and running a report

Once you have run a report, you can do the following:

- Modify the result
- Email the report
- Export the report
- Schedule reports to run automatically
Modifying the Results

After Decision Center generates results based on your initial filter settings, many tools and reports include remedy filters to enable you to refine and customize what you see. Descriptions of the available remedy filters appear on the reference page for each tool or report.
Decision Center - Creating Reports

- Modifying the Results

- After Decision Center generates results based on your initial filter settings, many tools and reports include remedy filters to enable you to refine and customize what you see. Descriptions of the available remedy filters appear on the reference page for each tool or report.

- Decision Center applies a remedy filter immediately when you select its activation check box.
Decision Center - Creating Reports

- Creating and running a report
  - Emailing reports
  - Exporting reports
Decision Center - Creating Reports

- Creating and running a report
  - Emailing reports
    - Run a Decision Center report
Decision Center - Creating Reports

- Creating and running a report
  - Emailing reports
    - Run a Decision Center report
    - Choose Email/Schedule button on the report results screen
Creating and running a report

Emailing reports

- Run a Decision Center report
- Choose Email/Schedule button on the report results screen
- Enter a name for the report in the Report Name field
- Enter one or more valid email addresses in the Email Addresses field
Decision Center - Creating Reports

- Creating and running a report
  - Emailing reports
    - Run a Decision Center report
    - Choose Email/Schedule button on the report results screen
    - Enter a name for the report in the Report Name field.
    - Enter one or more valid email addresses in the Email Addresses field.

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![Schedule and Email Report Screen](image)

- Report Name: `Low_Circulation_Weeding_Apr_02_2020_01`
- Email Addresses: `toconnell@midhudson.org`
- Formats: Microsoft Excel (xls), Adobe PDF (pdf)
- Frequency: Send Immediately
- Already Scheduled Reports:
  - Daily: 0
  - Weekly: 1
  - Monthly: 0
  - Particular Date: 0
  - Never: 0

Note: Click here to check already scheduled reports.
Decision Center - Creating Reports

- Creating and running a report
- Emailing reports
Creating and running a report

Emailing reports

- Run a Decision Center report
- Enter one or more valid email addresses in the Email Addresses field

This is a system-generated report sent by Decision Center.
Decision Center - Creating Reports

- Creating and running a report
  - Emailing reports
    - Run a Decision Center report
    - Enter one or more valid email addresses in the Email Addresses field

This is a system-generated report sent by Decision Center.
Decision Center - Creating Reports

- Creating and running a report
  - Exporting reports
  - Run a Decision Center report
Decision Center - Creating Reports

- Creating and running a report
  - Exporting reports
    - Run a Decision Center report
    - Choose Export to export your results and select a file format.
Creating and running a report

- **Exporting reports**
  - Run a Decision Center report
  - Choose Export to export your results and select a file format.

- You can work with exported review files using the **Create Lists** function in Sierra.
Decision Center - Creating Reports

- Creating and running a report
  - Exporting reports
    - Run a Decision Center report
    - Choose Export to export your results and select a file format.
  - You can work with exported review files using the Create Lists function in Sierra.

Exported Successfully! File is: \job\low_circulation\weeding\do_low_circulation\weeding\reviewfile\excel_list_report-MHLLconciliation-20200210-120728.boo.lsp
Creating and running a report

Exporting reports

- Run a Decision Center report
- Choose Export to export your results and select a file format.

You can work with exported review files using the Create Lists function in Sierra.
Creating and running a report

- **Exporting reports**
  - Run a Decision Center report
  - Choose Export to export your results and select a file format.

- You can work with exported review files using the *Create Lists* function in Sierra.
Scheduling reports

Decision Center's scheduling feature enables you to save a report configuration so that you can run the same report later.
Decision Center - Creating Reports

**Scheduling reports**

- Decision Center’s scheduling feature enables you to save a report configuration so that you can run the same report later.

- You can also schedule saved reports to automatically run daily, weekly, or monthly.
Decision Center - Creating Reports

- **Scheduling reports**
  - For automatically-run reports, Decision Center emails the report results to the recipients chosen during the report’s scheduling. Scheduled reports run at the conclusion of overnight data processing.
  - (7:00 am)
Scheduling reports

From the Schedule and Email Report dialog box, define your scheduling parameters -

- Report Name
- Email Addresses
- Formats
- Frequency
Scheduling reports

- From the Schedule and Email Report dialog box,
- choose the Click here to check already scheduled reports link in the dialog box.
- *Scheduled reports associated with my login.*
Decision Center - Creating Reports

- Scheduling reports
  - From the Schedule and Email Report dialog box,
  - choose the Click here to check already scheduled reports link in the dialog box.
Scheduling reports

From the Schedule and Email Report dialog box,

choose the Click here to check already scheduled reports link in the dialog box.
Decision Center - Creating Reports

- **Scheduling reports**
  - From the Schedule and Email Report dialog box,
  - choose the **Click here to check already scheduled reports** link in the dialog box.
Decision Center - Examples of Reporting

- Let’s look at *some* of the reports...
Decision Center - Examples of Reporting

- Evaluation: Circulation?
- Development: Popular Authors
- Balancing: Subject Use
- Maintenance: Low Circulation Weeding
Decision Center - Examples of Reporting

- Evaluation: Circulation?
Decision Center - Examples of Reporting

- **Evaluation: Circulation?**
Decision Center - Examples of Reporting

- Evaluation: Circulation?
Decision Center - Examples of Reporting

▶ Evaluation: Circulation?
Decision Center - Examples of Reporting

- **Evaluation: Circulation?**
Decision Center - Examples of Reporting

- Evaluation: Circulation?
Decision Center - Examples of Reporting

- **Evaluation: Circulation?**
### Decision Center - Examples of Reporting

**Evaluation: Circulation?**

<table>
<thead>
<tr>
<th>Call Number Range</th>
<th>All Item Types</th>
<th>Book</th>
<th>DVD</th>
<th>Short Loan</th>
<th>Large Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Call Number Ranges</td>
<td>2,385</td>
<td>1,613</td>
<td>323</td>
<td>126</td>
<td>110</td>
</tr>
<tr>
<td>040-089 Home Economics</td>
<td>38</td>
<td>38</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>350-369 Public Admin, Soc Services</td>
<td>18</td>
<td>18</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>740-749 Drawing</td>
<td>15</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>300-309 Social Sciences</td>
<td>14</td>
<td>14</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>330-339 Economics</td>
<td>12</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>010-019 Medicine</td>
<td>12</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>014-019 Travel</td>
<td>12</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Decision Center - Examples of Reporting

**Evaluation: Circulation?**
Decision Center - Examples of Reporting

- Evaluation: Circulation?
Decision Center - Examples of Reporting

**Evaluation: Circulation?**
### Decision Center - Examples of Reporting

<table>
<thead>
<tr>
<th>Number</th>
<th>Bib Record No.</th>
<th>Title</th>
<th>Author</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>b2316079</td>
<td><em>Lord of the Flies</em> (catalog)</td>
<td><em>Patterson, John</em></td>
<td>7</td>
</tr>
<tr>
<td>2</td>
<td>b1949137</td>
<td><em>Davinci Code</em> (catalog)</td>
<td><em>Kare Owen</em></td>
<td>6</td>
</tr>
<tr>
<td>3</td>
<td>b1975003</td>
<td><em>That pulp</em> (catalog)</td>
<td><em>George, Lindsey Barrett</em></td>
<td>6</td>
</tr>
</tbody>
</table>
### Decision Center - Examples of Reporting

#### Table:

<table>
<thead>
<tr>
<th>Number</th>
<th>Bib Record No.</th>
<th>Title</th>
<th>Author</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>b2319879</td>
<td>Lord of the fleas, (catalog.)</td>
<td>Pilkey, Dav</td>
<td>7</td>
</tr>
</tbody>
</table>

**Lord of the fleas / written and illustrated by Dav Pilkey as George Beard and Harold Hutchins ; with color by Jose Garibaldi.**

- **Pilkey, Dav, 1966:**
  - Material Type: Graphic Novel
  - Language: English
  - Record Number: b2319879
  - ISBN: 078054635173
  - Price Per Copy: $6.04

**Demand:**
- 23 holds placed
- 18 non-hold circulations

**Supply:**
- 88 current on-order copies
- 56 current and on-order copies
- 1.58 circs / copy / month

**Hold Queue:**
- 1 current hold wait time
Decision Center - Examples of Reporting

- Evaluation: Circulation?
- **Development: Popular Authors**
- Balancing: Subject Use
- Maintenance: Low Circulation Weeding
Decision Center - Examples of Reporting

- Development: Popular Authors
Decision Center - Examples of Reporting

- Development: Popular Authors

The Popular Authors report lists the library's most popular authors based on average monthly circulations over the last 90 days.
Decision Center - Examples of Reporting

- Development: Popular Authors
Decision Center - Examples of Reporting

- **Development: Popular Authors**
Decision Center - Examples of Reporting

- Evaluation: Circulation?
- Development: Popular Authors
- **Balancing: Subject Use**
- Maintenance: Low Circulation
  Weeding
Decision Center - Examples of Reporting

- Balancing: Subject Use by Location

Subject Use By Location

The Subject Use By Location tool describes title and item circulation within selected call number range(s) across locations and makes recommendations to expand or weed selected range(s) by location, based on library-determined performance expectations.
**Balancing: Subject Use by Location**
### Balancing: Subject Use by Location

<table>
<thead>
<tr>
<th>Branch</th>
<th>Number of Titles</th>
<th>Number of Items</th>
<th>Checkouts Last 365 Days</th>
<th>Renewals Last 365 Days</th>
<th>Total Circs Last 365 Days</th>
<th>Turnover</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Lebanon</td>
<td>163</td>
<td>190</td>
<td>24</td>
<td>12</td>
<td>36</td>
<td>0.2</td>
<td>Weed</td>
</tr>
<tr>
<td>New Paltz</td>
<td>606</td>
<td>934</td>
<td>170</td>
<td>150</td>
<td>320</td>
<td>0.34</td>
<td>Weed</td>
</tr>
<tr>
<td>North Chatham</td>
<td>279</td>
<td>284</td>
<td>14</td>
<td>14</td>
<td>29</td>
<td>0.1</td>
<td>Weed</td>
</tr>
<tr>
<td>Northeast Millerton</td>
<td>267</td>
<td>267</td>
<td>67</td>
<td>36</td>
<td>103</td>
<td>0.39</td>
<td>Weed</td>
</tr>
<tr>
<td>Pawtucket</td>
<td>37</td>
<td>37</td>
<td>9</td>
<td>4</td>
<td>13</td>
<td>0.35</td>
<td>Weed</td>
</tr>
<tr>
<td>Pembroke</td>
<td>211</td>
<td>215</td>
<td>96</td>
<td>24</td>
<td>93</td>
<td>0.43</td>
<td>Weed</td>
</tr>
<tr>
<td>Philmont</td>
<td>148</td>
<td>150</td>
<td>57</td>
<td>36</td>
<td>143</td>
<td>0.95</td>
<td>Weed</td>
</tr>
<tr>
<td>Phoenixia</td>
<td>31</td>
<td>32</td>
<td>27</td>
<td>24</td>
<td>81</td>
<td>1.59</td>
<td>Expand</td>
</tr>
<tr>
<td>Pine Hill</td>
<td>70</td>
<td>73</td>
<td>10</td>
<td>5</td>
<td>15</td>
<td>0.19</td>
<td>Weed</td>
</tr>
<tr>
<td>Pine Plains</td>
<td>149</td>
<td>151</td>
<td>73</td>
<td>30</td>
<td>100</td>
<td>0.86</td>
<td>Weed</td>
</tr>
<tr>
<td>Plattekill</td>
<td>221</td>
<td>221</td>
<td>63</td>
<td>26</td>
<td>92</td>
<td>0.42</td>
<td>Weed</td>
</tr>
<tr>
<td>Pleasant Valley</td>
<td>163</td>
<td>162</td>
<td>116</td>
<td>76</td>
<td>192</td>
<td>1.16</td>
<td>Expand</td>
</tr>
<tr>
<td>Pulaski Valley</td>
<td>602</td>
<td>602</td>
<td>40</td>
<td>24</td>
<td>64</td>
<td>0.90</td>
<td>Weed</td>
</tr>
<tr>
<td>Red Hook</td>
<td>174</td>
<td>174</td>
<td>76</td>
<td>56</td>
<td>244</td>
<td>1.15</td>
<td>Expand</td>
</tr>
<tr>
<td>Rhinebeck</td>
<td>401</td>
<td>404</td>
<td>95</td>
<td>55</td>
<td>272</td>
<td>0.67</td>
<td>Weed</td>
</tr>
<tr>
<td>Rhinecliff</td>
<td>240</td>
<td>252</td>
<td>14</td>
<td>10</td>
<td>32</td>
<td>0.13</td>
<td>Weed</td>
</tr>
</tbody>
</table>
Decision Center - Examples of Reporting

- Evaluation: Circulation?
- Development: Popular Authors
- Balancing: Subject Use
- Maintenance: *Low Circulation* *Weeding*
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**

![Diagram showing low circulation weeding and clean-up categories]
Maintenance: Low Circulation Weeding
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**

![Screenshot of Decision Center interface showing examples of reporting for low circulation weeding.](image)
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
Decision Center - Examples of Reporting

- Maintenance: Low Circulation Weeding
**Decision Center - Examples of Reporting**

- **Maintenance: Low Circulation Weeding**

<table>
<thead>
<tr>
<th>Item Location</th>
<th>Shelf Location</th>
<th>Call Number</th>
<th>Barcode</th>
<th>Title</th>
<th>Author</th>
<th>Total Circs</th>
<th>Circs Last 12 Months</th>
<th>Copies in Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>32369000326429</td>
<td>9F CONF</td>
<td>Diary of a monster's son</td>
<td>Conrad, Ellen</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>2349 00019 8592</td>
<td>J 978.004 POAT</td>
<td>Indian legacy: Native American influences on world life and culture</td>
<td>Harrington, Mireya</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>32389000042473</td>
<td>J F BENT</td>
<td>Am I the princess or the frog?</td>
<td>Harrison, Jim</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>2349 00018 2161</td>
<td>J 779 HOB</td>
<td>Shadows and reflections</td>
<td>Hoven, Tina</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>2349 00024 8416</td>
<td>J795.7 ARM</td>
<td>Bubus</td>
<td>Armentrout, David</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>32389000094867</td>
<td>J 400 VOI</td>
<td>Teddy &amp; Co</td>
<td>Vogt, Cynthia</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>2349 00056 4574</td>
<td>JF STIN pb</td>
<td>Let's get married</td>
<td>Show, R. L.</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>2349 00042 9497</td>
<td>J 989 HKN</td>
<td>Taking risks: the story continue</td>
<td>Knight, Mary Burn</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>2349 00019 853</td>
<td>J 082 QRM</td>
<td>About noble men and squabbling</td>
<td>Schwab, Eliza</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>323690008986444</td>
<td>J 988.22 PY</td>
<td>Remy Rick: (For linking items and placing holds)</td>
<td>Remy, Howard</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>32389000588647</td>
<td>J 088.22 PLY</td>
<td>The story of King Arthur and his knights</td>
<td>Remy, Howard</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Milbrook</td>
<td>Children</td>
<td>323890000588647</td>
<td>J 972.91 EERD</td>
<td>The author</td>
<td>Remy, Howard</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation**
- **Weeding**

![Image of a library catalog system showing a book record with details such as title, author, and circulation information. The image includes a chart showing demand, supply, and hold queue status.]
Decision Center - Examples of Reporting

- Maintenance: Low Circulation Weeding
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
  - Physical Format = MAT Type
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation**
  - **Weeding**
  - Collections = Item Types
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
Decision Center - Examples of Reporting

- **Maintenance: Low Circulation Weeding**
So, any questions..?
So, any questions..?

https://dc-mhud.iii.com/
So, any questions..?

Any time you have questions or comments,
Please feel free to send an email to:

toconnell@midhudson.org
techsupport@midhudson.org