

collectionHQ June 2020 Release Notes and Frequently Asked Questions

In response to the impact of COVID-19 on libraries, new collectionHQ functionality will be released on June 17th, 2020, to consider branch closures when calculating the following Action Plans.

1. Action Plans calculating material as “Dead”

collectionHQ will allow material extra time to circulate before classifying as dead in consideration of branch closures. If your default setting for Fiction Dead Items is set to 180 days and branch A is closed for 70 days and branch B for 120 days, then material would be classified as dead if not checked out for 250 and 300 days respectively. This enhancement will influence:

- Collection Check (Fiction, Non-Fiction & Non-Book)
- Long Overdue Check (Fiction, Non-Fiction & Non-Book)
- Dead Items Removal (Fiction, Non-Fiction & Non-Book)

Please note:

- Summary reports and Dashboard charts for Dead Items and Collection Check will display results with branch closures considered.
- eBook Dead Items Removal will not consider branch closures.

2. Transfer Action Plans

collectionHQ Transfer Action Plans highlight items that are not circulating at their current branch but may perform better at another where there is demand. The enhancements will extend the time period of analysis used to suggest items for transfer, incorporating the duration of branch closures. This will impact:

- Grubby Items Refresh (Fiction, Non-Fiction and Non-Book)
- Rebalance Push & Pull (Fiction, Non-Fiction and Non-Book)
- Popular Author Transfer (Fiction)
- Popular Subject Transfer (Non-Fiction)

Please note:

- The ‘Transfer Items Available’ Dashboard chart is driven by these Action Plans, so will also take into consideration branch closures.

2. Collection Use Summary – Collection Status (Understocked and Overstocked)

collectionHQ calculates the Collection Status of collections at each branch and reports this as either Normal, Understocked or Overstocked. Enhancements will extend the time period used to calculate circulation - considering branch closure duration - to determine the Collection Status. This spans Collection Use Summary in Fiction, Non-Fiction and Non-Book.

Please note:

- Circulation used in Spending Plans and Selection Specifications in the Specify Module is driven from Collection Use Summary and thus will also take branch closures into account.

4. Rebalance Push and Pull

Rebalance Action Plans highlight material that can be transferred from one branch that is Overstocked to another that is Understocked in a collection area. Changes to the calculation of Collection Status and items for transfer will inform Push and Pull Action Plans to accommodate lower circulation due to branch closures.

Frequently Asked Questions

1. Will I lose data as a result of setting branches as “closed”?

collectionHQ will continue to use all of your data. We wish to ensure material is not penalized for lack of circulations during closed periods, but that a book attracting circulations during closure will still have these added to its total circulation count.

2. My library is operating curbside pick-up, should I mark my library as “open”?

This feature supports libraries that remain closed completely to the public as well as branches that have opened in a limited capacity. For example, if providing a curbside pick-up service for small parts of the collection and in small quantities, then you may wish to continue to classify this as a closed branch on collectionHQ. Branch closure settings can be edited to meet your unique library needs and can be turned off as soon as your library returns to normal.

3. Can I change branch closure dates retrospectively in collectionHQ?

Yes, you can alter the branch closure dates you have entered into collectionHQ as many times as you wish. No data will be lost. If you are not sure when a branch will reopen, you can leave the branch ‘Closure End’ field empty and return later to add a date. You can also date branch closures retrospectively.

In order to see new or altered branch closures take effect in collectionHQ Action Plans, you simply need to regenerate your current dataset from within the Administration Module or wait for your next dataset to load into collectionHQ. With each dataset processing, collectionHQ will take the most up-to-date branch closure information you have entered and recalculate all Action Plans. All circulation data will be recorded regardless of branch closures.



4. Do I need to manually change my target settings for collectionHQ Action Plans to consider branch closures?

No, you will not be required to change targets manually. collectionHQ will automatically take branch closures into account when calculating results for Action Plans, saving you time and effort.