

## collectionHQ COVID-19 Response & Frequently Asked Questions

In response to the impact of COVID-19 on libraries, new collectionHQ functionality will be released on July 29th, 2020 to consider branch closures when calculating Dead On Arrival (DOA). Enhancements to the administration of branch closures making it easier to manage branches opening and closing, will also be released.

These enhancements come on top of those already released in June and have all been added to assist as the library world adapts to the new normal. Whether your library has reopened in some capacity, remains closed, or has unfortunately re-closed due to regional restrictions, please know that we are here to help you maintain an appealing collection that will engage your community and meet local demand, all whilst considering the impact branch closures will have.

Please find the details of what has been enhanced and when, plus a Frequently Asked Questions section that may answer some queries you have. This includes what to consider when marking your branches as open again in collectionHQ and what that entails. If you require further assistance, please don't hesitate to get in touch with your Customer Success Manager, Account Manager or our Support team via email [support@collectionhq.com](mailto:support@collectionhq.com).

### July 2020 Enhancements

#### **1. Dead On Arrival (DOA)**

Dead On Arrival considers items that were added to your collection between 6 and 18 months prior to your latest dataset (which is a 12 month purchasing window). Any items added during this window must now have had at least 6 months at an open branch (or branches if transferred) to be included in the Dead On Arrival calculations. Items that were added in this time window that have been affected by branch closures and not had 6 months at an open branch, will be removed from analysis until they have. This gives all items a fair chance to not be classified as Dead On Arrival and helps our customers deal with branch closures.

Dead On Arrival Example:

- An item was added to your collection 8 months ago, so therefore it is a candidate for analysis within DOA as it was added in the 12-month window in question.
- It was at a branch that was closed for 4 of those 8 months, therefore it has only had 4 months at an open branch.
- This would result in that item not being included in Dead On Arrival.
- When a future dataset processes, and that same item has now been at an open branch for at least 6 months, it will then automatically be included in Dead On Arrival analysis (assuming the 12 month window of when it was added to the collection is still applicable at that time).

Please note that a dataset regeneration will be required after this release is made.

## 2. Easier Administration of Branch Closures

Enhancements have been made to the tools for administering your branch closure dates within collectionHQ. A new 'bulk open or close branches' tool has been added which gives the ability to open multiple branches that are currently marked as closed quickly or vice versa.

This will enable you to easily transition from e.g. a System Wide closure to having only one or two branches open. Similarly, if you require to bulk close branches, you can also make use of this tool.

A branch can have multiple closures entered into collectionHQ, so long as those closures don't overlap and are a minimum of 28 days long. It is not recommended that you enter a closure of less than 28 days as this won't have any impact on collectionHQ Actions Plans EBSM algorithms.

You can find this tool in Administration > ILS Settings > Libraries. The current "System Wide Closure" button will be replaced with a new "Bulk Open/Close Branches" button.

Please note that you will require the "admin" role to access Administration within collectionHQ.

## June 2020 Enhancements

### 3. 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.

### 4. 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.

## **5. 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.

## **6. 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 nearer their pre-closure levels.

### **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.