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6-15-2004

Uses of a Data Extraction from the Serials and Acquisitions Module

Janet Hulm
University of Iowa

Wendy C. Robertson
University of Iowa

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Details for the Poster Session on Data Extractions

NAAUG 2004
Presented by Janet Hulm and Wendy Robertson
janet-hulm@uiowa.edu
wendy-robertson@uiowa.edu
University of Iowa Libraries

General Information for All Data Extractions

"Reports" are run by Systems staff. Serials staff retrieves from task manager and moves to Excel or Access as appropriate/desired. Files are saved with extension "txt" for use in Excel and "csv" for use in Access.

More data is extracted than is needed by Serials staff because these serve multiple units with varying needs.

Serials Data Extraction

GENERAL

- The extraction is run twice monthly on the 1st and 3rd Mondays.
- Character "~" delimited text

SPECIFICATIONS

Extraction based on:

- Z16-SUB-LIBRARY (Not LAW, or only LAW)
- Z30-EXPECTED-ARRIVAL-DATE (Where this date is past)

Fields included:

Order form (Z68):

- ORDER-NUMBER-1 (ALT ORDER NUMBER)

Subscription Information (Z16):

- SUB-LIBRARY
- VENDOR-CODE
- VENDOR-ORDER-NUMBER
- ORDER-NUMBER
- NOTE
- COPY-SEQUENCE (SUBSCRIPTION NO.)
- DELAY (NO. FROM FIRST CLAIM INTERVAL)

Serials Claims (Z20) that match the Z30 record key:

- NO. OF PREVIOUS CLAIMS

Items (Z30):
- DESCRIPTION
- PAGES
- ISSUE-DATE
- EXPECTED-ARRIVAL-DATE

Short Doc (Z13):
- TITLE

Links (Z103):
- REC-KEY-1 (BIB DOC NO.)

USES

I Claims report
- A) Using the expected arrival date allows for good control over what appears on the claims report.
- B) Allows for several kinds of sorts.
  - 1) Vendor
  - 2) Note field
  - 3) Sub-Library
- C) Running through Access allows us to make specialty sub-reports.
  - 1) Current new claims
    - (a) where issue date is within one year and there are no previous claims.
  - 2) Problem claims
    - (a) where issue date is more than one year out, and there are more than 0 previous claims.
- D) Will pick up items that require claiming without a subscription form.

II Problem finding
- A) Subscriptions not linked to order records.
- B) Data errors.
- C) Improper claims intervals.
- D) Using notes or pages to search out special problems.
  - 1) Old vendors.
  - 2) New orders.
- E) Miscellaneous clean-up.
  - 1) Notes that contain names or codes no longer used.
  - 2) Items that require deletion.

Open Subscriptions Data Extraction

GENERAL

- The extraction is run only as requested.

SPECIFICATIONS

Extraction based on:

- Z16-SUB-LIBRARY (Not LAW, or only LAW)
- Z16-COPY-TO-DATE (after today's date)

Fields included:

Subscription Information (Z16):

- ORDER-NUMBER
- VENDOR-CODE
- VENDOR-ORDER-NUMBER
- SUB-LIBRARY
- COPY-TO-DATE
- DELAY (NO. FROM FIRST CLAIM INTERVAL)

USES

I Used on own to:

A) Look for 1st claim intervals that are to long (and so things won't show up on the regular claim reports).

B) Subscriptions that lack a vendor reference number when we would expect one for that vendor.

C) Find unneeded subscriptions for our electronic resources sublibrary (one time cleanup from conversion).

II Used with the "Open orders" extraction to:

A) Compare vendors and vendor reference numbers in the order and subscription to make sure they match (since they are not linked in the system and need to be updated in both places, we have found it is an error prone section of the subscription).

Open Orders Data Extraction

GENERAL

- The extraction is run weekly.

SPECIFICATIONS

Extraction based on:

- All orders with Order type SV.
- Separate extraction for each budget group (Z76-SUB-KEY-2).

Fields included:

Order form (Z68):

- ORDER-NUMBER
- ORDER-NUMBER-1
- SUB-LIBRARY
- ORDER-TYPE
- OPEN-DATE
- ORDER-GROUP
- MATERIAL-TYPE
- METHOD-OF-ACQUISTION
- LIBRARY-NOTE
- VENDOR-CODE
- VENDOR-REFERENCE-NO
- SUBSCRIPTION-RENEW-DATE
- E-LOCAL-PRICE (AMT)
- RUSH
- PATRON NAME (TARGET-TEXT)

Budget Transactions (Z601):

- REC-KEY (BUDGET CODE)

Short Doc (Z13):

- TITLE
- ISBN-ISSN

Links (Z103):

- REC-KEY-1 (BIB DOC NO.)

USES

I Used on own to:

A) Keep track of some types of renewals with renewal date – electronic renewals, things for which we need to request invoices, etc.
B) Give selectors a list of all subscriptions (including gifts, exchanges and titles in packages).
C) Generate raw data for ARL statistics.

D) Look for cancelled titles that are still open.
E) Look for new orders that are getting old.
F) Find coding problems (coded for payment, no budget ; budget, not coded for payment, etc.).
G) Look for multiple subscriptions for same title (likely cancellation candidates).
H) Look for vendors that should be changed/corrected. Particularly useful when a vendor fails or when we have determined to move things from a particular vendor.
I) Compare our list of active orders with a list of orders from a specific vendor.
   (a) Confirm what we think is on order is on order for renewals and cleanup.
   (b) Confirm that we are aware of all the “online free with print” titles.

II Used in combination with many other extractions. This is our basic building block.

“All the Payments in the Fiscal Year” Data Extraction

GENERAL

- The extraction is run on the last Thursday of the month and as needed for fiscal year end.

SPECIFICATIONS

Extraction based on:

- All activity (payment/credit) on all active budgets (Z76-STATUS = AC, Z601-TYPE = “INV”).
- Separate extraction for each budget group (Z76-SUB-KEY-2).

Fields included:

Budget Transactions (Z601):

- REC-KEY (BUDGET CODE)
- ORIGINAL-SUM (AMT)

Invoice Payment (Line Item) (Z75):

- I-NOTE (LINE ITEM NOTE)
- REC-KEY-2 (INVOICE NO.)

Invoice Header (General Invoice) (Z77):

- P-DATE (PAYMENT DATE)

Order form (Z68):

- ORDER-NUMBER
- ORDER-NUMBER-1 (ALT ORDER NO.)
- ORDER-TYPE
- MATERIAL-TYPE
- ORDER-GROUP
- ORDER-STATUS

Vendor record (Z70):
- o VENDOR-NAME

Short Doc (Z13):
- o TITLE

Links (Z103):
- o REC-KEY-1 (BIB DOC NO.)

USES

III Used on own to:
- A) Let selectors know how much their subscriptions cost (particularly useful for new selectors; complete data comes from end of fiscal year).
- B) Compare costs in different fiscal years.
- C) See payments posted to all our prepaid accounts with subscription agents.
- D) Look for closed subscriptions that have been paid for (to look for problems).

IV Used with the “Open orders” extraction to:
- A) Find subscriptions that haven’t been paid yet in particular fiscal year that should have been (proactive claiming).
- B) Combine with last year’s data to find expensive things that have not yet been paid (of particular use when selectors ask what is left in fiscal year so they can better estimate how much money they have left).
- C) Combine multiple years’ data to look for things that have not been paid for several years – coding errors, dead orders to clean-up. Of use for both subscriptions and continuations. This category is gradually declining as we clean up the problems.
- D) Give selectors information for cancellation projects.

III NOTE: by the end of the fiscal year, this report may be so big it must be directly brought into Access. (The current size of our report is 18,148,795.).