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Spreadsheet Models for Cataloging Statistics

Mary K. Bolin

ABSTRACT. Statistics about cataloging activity are collected for several reasons: to monitor productivity and workflow and to satisfy requests from outside agencies and the library administration about the size and nature of the library's collection. Several spreadsheets developed at the University of Idaho Library to collect statistics about cataloging activity and technical services activity and costs are examined here.

Although our effectiveness is hard to measure, librarians and library staff are concerned about how good a job we are doing. At the University of Idaho (UI) library, in common with most libraries, one thing we do to monitor our performance is to keep statistics about our activities. Statistics serve many purposes, and what is appropriate for one institution may be of no use to another. Moreover, there is often a strong but hard-to-discern historical reason for keeping certain statistics which makes it hard for a library to distinguish gathering essential information from mere habit. Nevertheless, sharing information about statistics-keeping is useful for distinguishing the essential from the habitual.

Although library literature includes information about library data collection,¹ spreadsheet models for library use,² and the cost of technical services in particular,³ little or nothing has been written specifically about what data is collected regarding cataloging pro-

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duction or cost.⁴ While the kinds of statistics traditionally collected about cataloging are generally straightforward accounts of how many items were cataloged in a given period broken down into various categories by format and by the tasks which make up cataloging, this information can be the basis for planning and decision-making about staffing, budgeting and workflow.⁵

The Cataloging Department of the UI library collects statistics for several purposes. The first is to keep track of how many volumes are added to the library's collections and in what areas. A second reason is to monitor workflow and productivity within the department. A third purpose is to review the amount of money spent for each function (including cataloging) provided by the Western Library Network (WLN), the library's bibliographic utility.

A number of different electronic spreadsheet programs have been used to keep cataloging statistics. Up until the mid-1980s statistics were kept by hand and calculator. In about 1984, we began to use one of the early *VisiCalc*-type spreadsheets such as *PC-Calc* and *ExpressCalc*. This was revolutionary at the time, and made it much easier to store, compare and print statistical data about cataloging. The technique used to create a monthly departmental spreadsheet, however, was to gather statistics reported by individuals and add the total for each area of the classification schedule by hand before entering the total into the spreadsheet.

In 1987, we began using *Silk*, a much more powerful package, quite similar to *Lotus 1-2-3*, and able to import and export *Lotus* files. While the cataloging department has successfully used a spreadsheet which is similar to *Lotus* and can import and export *Lotus* files but not read and write them directly, it would have been better to have bought a copy of *Lotus* for the department. Using a non-standard file format has required extra effort in order to give someone a file on a disk, and we have not been able to use any of the commercial, shareware and public domain *Lotus* add-ins, templates and macros which have been developed.

We have developed several different spreadsheet models to accomplish the purposes described above. None of these uses more than the four basic arithmetic functions to analyze the data. Nevertheless, the information is useful for decision-making about staffing, performance appraisal, budgeting and collection analysis. The

first model is a conventional monthly cataloging total which has been in use for about five years, and is based on the form which was used when all statistics keeping was done manually. It shows numbers of titles cataloged and total number of volumes added in call numbers A-Z, in each area of the library's Special Collections (materials of local interest), and in each format such as computer files, sound recordings, microforms, etc. It keeps separate counts of monographs and serials, and of original and copy cataloging.

Totals in the columns for original, adaptive (records found in RLIN and retagged for inputting into WLN, or WLN records for similar items), database (copy cataloging) and serials cataloging feed into the "total cataloged" column. Added volumes and copies are combined with those totals, and items which have been lost or withdrawn are subtracted to arrive at the total added each month.

Each person in the department still keeps a monthly statistics sheet, but totals for individuals are no longer added by hand to reach a departmental total (see Figure 2). The monthly spreadsheet also includes a column for each person, with multiple columns for people who do both copy and original cataloging. There is also a separate column for each person's added copies and volumes. Each of these columns feeds into the summary section (Figure 1) which is eventually printed and shared with the department and the rest of the library.

These separate monthly spreadsheets are saved in individual files, but the monthly spreadsheet is also one part of the broader technical services statistics spreadsheet. The most important purpose of that spreadsheet is to show how many volumes are added each fiscal year. Cataloging totals for each month are imported into the technical services spreadsheet. Volumes added automatically update a table which shows volumes added month by month. The total volumes column in the monthly spreadsheet in Figure 1 feeds into the appropriate volumes column in Figure 3, each time the new month is imported into the technical services spreadsheet. The figures in the "bound volumes" column are supplied at the end of the year by the serials department, and are subtracted from the total.

These monthly volume totals cumulate and are also added to another table which shows total volumes already in the library at the beginning of the fiscal year, how many have been added thus far,

FIGURE 1. Cataloging Department Statistics FY89/90: January 1990

CLASS.	ORIG.	ADAP- TIVE	DATA- BASE	ORIG. SER.	DATA-		LOST & W'DRN	ADDED COP/VOL	TOTAL VOLUMES
					BASE SER.	TOT. CAT.			
A	0	0	0			0	8		8
B	0	1	33			34	0		34
C	0	0	2			2	0		2
D	0	3	54			57	13		70
E	0	6	21			27	3		30
F	1	1	20			22	6		28
G	2	0	17			19	8		27
H-HJ	3	1	86		3	93	46		139
HM-HX	0	1	52			53	6		59
J	0	1	30			31	6		37
K	0	0	4		1	5	4		9
L	0	0	11			11	4		15
M	39	15	29			83	2		85
N	17	2	46			65	4		69
P	53	1	180	1		235	41		276
Q	5	14	76			95	76		171
R	7	1	15			23	8		31
S	6	4	18	1		29	59		88
T	6	5	48			59	42		101
U-V	0	0	5			5	0		5
Z	0	0	4			4	5		9
TOTAL	139	56	751	2	4	952	341	0	1,293
SPECIAL COLLECTIONS:									
CAXTON	0	0	0			0	0		0
DAY-NW	5	0	13			18	17		35
IDAHO	0	0	2			2	107		109
ID. MAPS	0	0	0			0	0		0
POUND	0	0	0			0	0		0
SCOTT	0	0	1			1	0		1
SPEC	0	0	0			0	0		0
THESES	0	0	0			0	0		0
SPEC TOTAL	5	0	16	0	0	21	124	0	145

FIGURE 1 (continued)

AUDIOVISUAL:										
CLASS.	ORIG.	ADAP- TIVE	DATA- BASE	ORIG. SER.	DATA-		TOT. CAT.	LOST & W'DRDN	ADDED COP/VOL	TOT. VOL.
					BASE SER.	TOT. CAT.				
BROWSING	0	0	14				14	0		14
CD's	0	0	3				3	0		3
CASSETTES	0	0	0				0	0		0
PHONODISC	0	0	0				0	0		0
KITS	0	0	0				0	0		0
MANUSCRIPTS	0	0	0				0	0		0
MAPS	0	0	0				0	0		0
COMP. FILES	0	0	0				0	0		0
VIDEOS	0	0	0				0	0		0
DOCUMENTS	0	1	0				1	0		1
AV TOTAL	0	1	17	0	0		18	0	0	18
MICROFORMS:										
FICHE-1ST	0	0	0				0	0		0
FICHE-2ND	0	0	0				0	1,110		1,110
FICHE-3RD	0	0	0				0	0		0
FILM-1ST	0	0	0				0	0		0
FILM-2ND	0	0	0				0	0		0
FILM-3RD	0	0	0				0	0		0
TOT. MFMS	0	0	0	0	0		0	1,110	0	1,110
GRAND TOT.	144	57	784	2	4		991	1,575	0	2,566

current new total, and what percentage of the library collection is represented by each location or call number (see Figure 4). There is also a section for acquisitions activity – items ordered and received (see Figure 5).

Another spreadsheet which shows cataloging activity is the cataloging workflow spreadsheet. As its name implies, its purpose is to show activities which contribute to the department's workload but not necessarily to the library's volume count. It includes a month-

TECHNICAL SERVICES QUARTERLY

FIGURE 2. Monthly Totals for Individuals Copy

CLASSIFICATION	ab	cd	ef	etc. ...
A				
B	7	10	16	
C	1	1		
D	9	20	25	
E	6	9	6	
F	4	8	8	
G	3	6	2	6
H-HJ	22	19	45	
HM-HX	10	22	20	
J	7	6	17	
K	1	1	2	
L	3	4	4	
M	13	7	9	
N	25	18	3	
P	63	25	7	84
Q	41	2	33	
R	3	5	7	
S	8	4	6	
T	23	5	20	
U-V			1	4
Z	4			
TOTAL	253	0 172	10 315	1
SPECIAL COLL:				
CAXTON				
DAY-NW	7	2	4	
IDAHO	2			
IDAHO MAPS				
POUND				
SCOTT	1			
SPEC				
THESES				
SPEC TOTAL	10	0 2	0 4	0
etc.				

by-month summary of original and copy cataloging, WLN activity, and other activities which are not “new” cataloging and therefore cannot be counted on the spreadsheet which represents volumes added, as well as miscellaneous tasks such as recataloging, changes to database records, items classified. Most serials cataloging activity is reflected here, since so much serials cataloging is recataloging (“old serials and periodicals” in Figure 6), and also because the library counts new serial titles as they are cataloged, but does not count periodicals until they are bound.

An additional spreadsheet was developed in 1989 to help monitor the WLN budget and activity. This spreadsheet has subtotals for each area which uses WLN—cataloging, acquisitions, ILL, as well as products such as WLN’s CD-ROM catalog LaserCat, and telecommunications charges (see Figure 7). The amounts from each monthly invoice are transferred to this spreadsheet in order to see more clearly where the money is being spent. Terminals are generally dedicated to only one activity, which makes it easy to divide the maintenance and terminal connect charges. Charges for inquiries are arbitrarily divided among the functional areas according to the number of terminals each has, even though cataloging undoubtedly does more searching per terminal than ILL, for example. The data in this spreadsheet are valuable for automation planning, since it is possible to see approximately how much money could be dedicated to an online system with some of the capabilities now supplied by a utility.

While these models have been refined over time and are generally adequate for gathering useful information, and while it is not particularly cumbersome or time-consuming to work with them, the models are not perfect, and are sometimes limited by habit or by the capabilities of the software. Although it is useful to have individual monthly spreadsheets which show activity for the department and for individuals, it would also be useful to see a running total for each person, such as the running volumes-added total which is part of the large technical services spreadsheet. A three-dimensional spreadsheet, or one with the ability to link worksheets, would accomplish this end. While some data is transferred from one worksheet to another, some rekeying is also necessary. Summary data from monthly cataloging statistics is keyed into the cataloging

TECHNICAL SERVICES QUARTERLY

FIGURE 3. Volumes Added, Fiscal Year: 89/90

CLASSIFICATION	JULY	AUG	SEPT	BOUND TOTAL		TOTAL IN LIBRARY	CLASSIFICATION
				VOLS	ADDED		
A	7	3	6		41	16,995	A
B	16	26	21		252	22,052	B
C	1	9	5		43	2,892	C
D	43	59	49		523	32,534	D
E	29	29	26		219	29,044	E
F	25	24	33		223	15,587	F
G	20	64	44		314	18,918	G
H-HJ	81	154	103		1,115	64,345	H-HJ
HM-HX	39	28	37		335	19,782	HM-HX
J	16	31	17		234	21,941	J
K	7	18	5		104	4,785	K
L	12	21	25		183	21,047	L
M	83	69	80		754	17,045	M
N	17	75	24		409	20,101	N
P	151	143	180		2,057	83,838	P
Q	131	154	186		1,666	129,974	Q
R	18	42	14		293	18,797	R
S	94	97	74		954	48,746	S
T	84	84	80		901	73,816	T
U-V	3	5	7		66	3,052	U-V
Z	14	17	24		128	10,290	Z
TOTAL	891	1,152	1,040	0	10,814	675,581	TOTAL
SPECIAL COLL:				SPECIAL COLL:			
BASQUE					0	3,396	BASQUE
CAXTON	1	1	0		4	1,051	CAXTON
DAY-NW	58	20	21		334	13,951	DAY-NW
IDAHO	22	60	45		1,179	11,312	IDAHO
IDAHO MAPS	1	0	0		1	11	IDAHO MAPS
POUND	0	0	0		1	369	POUND
SCOTT	0	0	0		1	1,286	SCOTT
SPEC	(145)	(3)	0		(202)	1,671	SPEC
THESES	22	30	19		219	5,110	THESES
DAY-2					0	1,365	DAY-2
SPEC TOTAL	(41)	108	85	0	1,537	39,522	SPEC TOTAL

AUDIOVISUAL AND OTHER:

BROWSING	19	25	0	(12)	(129)	BROWSING	
COMPACT DISCS	(2)	5	0	61	277	COMPACT DISCS	
CASSETTES	0	0	0	0	215	CASSETTES	
PHONODISCS	0	0	0	0	2,308	PHONODISCS	
KITS	0	0	0	0	12	KITS	
MANUSCRIPTS	0	0	0	0	52	MANUSCRIPTS	
MAPS	0	0	0	666	837	MAPS	
COMPUTER FILES	0	0	0	1	6	COMPUTER FILES	
VIDEOCASSETTES	0	0	0	3	4	VIDEOCASSETTES	
DOCUMENTS	17	122	0	308	766	DOCS	
AV TOTAL	34	152	0	0	1,027	4,348	AV TOTAL
MICROFORMS:				MICROFORMS:			
1ST FLOOR FICHE	0	8	0	559	0		
2ND FLOOR FICHE	1,019	978	12	10,925	0		
3RD FLOOR FICHE	0	10	0	89	989,746	ALL MICROFICHE	
1ST FLOOR FILM	406	419	0	825			
2ND FLOOR FILM	(2)	0	0	(2)			
3RD FLOOR FILM	0	0	0	0	21,374	ALL MICROFILM	
MICROCARD				0	10,833	MICROCARD	
MICROPRINT				0	97,143	MICROPRINT	
TOTAL MICROFORMS	1,423	1,415	12	0	12,396	1,119,096	TOTAL MICROFORMS
TOTAL VOLUMES	2,307	2,827	1,137	0	25,774	1,838,547	TOTAL VOLUMES

workflow spreadsheet, for example, rather than being linked or imported. It would be easier to create the WLN cost data spreadsheet if the monthly invoice from WLN came on disk, in a .WKS file, for example, rather than only in its present paper form. Another software (and hardware) limitation is that spreadsheets are limited in size by available memory. Most library machines are still IBM-PCs or PC-XTs with 640K memory, which are not always able to manipulate a very large spreadsheet. The technical services spreadsheet, for example, is more than 100,000 bytes long, and it is nec-

FIGURE 4. Comparative Table

CLASSIFICATION	TOTAL VOLUMES		TOTAL VOLUMES AS OF 7-1-90
	AS OF 7-1-89	FY89/90	
A	16,995	41	17,036
B	22,052	252	22,304
C	2,892	43	2,935
D	32,534	523	33,057
E	29,044	219	29,263
F	15,587	223	15,810
G	18,918	314	19,232
H-HJ	64,345	1,115	65,460
HM-HX	19,782	335	20,117
J	21,941	234	22,175
K	4,785	104	4,889
L	21,047	183	21,230
M	17,045	754	17,799
N	20,101	409	20,510
P	83,838	2,057	85,895
Q	129,974	1,666	131,640
R	18,797	293	19,090
S	48,746	954	49,700
T	73,816	901	74,717
U-V	3,052	66	3,118
Z	10,290	128	10,418
TOTAL	675,581	10,814	686,395

etc.

essary to remove memory-resident programs such as Sidekick before loading it.

The other limitation to the usefulness of cataloging spreadsheets is a more subtle one. It is hard to develop a model which is free from unnecessary but historical categories, and which includes everything which is important to us without being burdensome to collect. Even if a library makes the effort to periodically re-examine statistical categories, it is easier to add new categories than to stop collecting data which has been kept for years.

The various reasons for keeping cataloging statistics are obvious from the kinds of spreadsheet models described above. The most

FIGURE 5. Serials/Acquisitions

VOLUMES RECEIVED	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL
UNIT ORDER MONOS	528	262	196	164	314	411	2,783
APPROVALS	309	355	256	154	424	436	3,010
BLANKET ORDERS							0
SERIALS	2,721		1,758	3,893	2,578	3,660	20,863
TOTAL	3,558	617	2,210	4,211	3,316	4,507	0 26,656
GIFT PIECES:							
MONOGRAPHS							0
SERIALS	79	676	2,987	1,740	1,735	315	7,860
PERIODICALS	4,755	2,674	3,041	1,572	10,664	380	27,321
TOTAL GIFTS	4,834	3,350	6,028	3,312	12,399	695	0 35,181
TOTAL RECEIVED	8,392	3,967	8,238	7,523	15,715	5,202	0 61,837
ORDERS:							
UNIT ORDERS:							
MONOGRAPHS	118	279	358	214	455	291	2,859
APPROVALS	191	484	999	447	211	433	3,605
SERIALS					1		2
PERIODICALS	146	437	40	22	158	6	895
TOTAL UNIT ORD.	455	1,200	1,397	683	825	730	0 7,361
STANDING ORDERS:							
MONOGRAPHIC SETS							0
SERIALS	3			1	5		20
SERIAL GIFTS	25		18	23	18	13	165
PERIODICALS	7		6	5	7	4	45
PERIODICAL GIFTS	17		9	7	19	9	99
TOTAL STAND. ORD	52	0	33	36	49	26	0 329
TOTAL ORDERS	507	1,200	1,430	719	874	756	0 7,690

FIGURE 6. Cataloging Dept. Annual Workflow Statistics

CATEGORIES	JULY	AUGUST	SEPTEMBER	MONTHLY AVE	TOTAL
INQUIRIES	14,906	20,424	21,126	20,767	166,133
ATTACH HOLDINGS	1,031	1,220	1,038	1,240	9,917
ORDER CARDS	1,140	1,704	1,227	1,387	11,095
INPUT RECORDS	240	300	677	443	3,540
CATALOG CARDS	2,620	3,915	2,939	3,034	24,272
ORDERS CREATED	387	1,012	1,393	833	6,665
WLN CHARGES	\$6,576.97	\$8,676.47	\$11,389.59	\$8,961.50	\$71,691.97
TOTAL HOLDINGS	377,893	379,402	381,085		
LOST & WITHDRAWN	190	122	0	88	701
CALL#'S ASSIGNED	433	94	218	268	2,416
ORIGINAL CATALOGING:					
MONOGRAPHS	147	145	216	253	2,279
NEW SERIALS/PERIODICALS	32	50	22	19	175
OLD SERIALS/PERIODICALS	6	2	5	4	21
ANALYTICS	7		23	13	103
TOTAL ORIGINAL	192	197	266	289	2,578
DATABASE COPY:					
MONOGRAPHS	633	989	733	915	8,237
NEW SERIALS/PERIODICALS	10	26	14	22	176
OLD SERIALS/PERIODICALS	59		1	30	60
ANALYTICS	26	20	54	66	590
TOTAL DATABASE	728	1,035	802	1,033	9,063
TOTAL CATALOGED	920	1,232	1,068	1,322	11,641
CHANGES TO DATABASE RECORDS:					
MONOGRAPHS	16	16	49	19	173
SERIALS/PERIODICALS	13	12	13	17	154
ANALYTICS	3			2	5
CIP's	3	21	17	20	178
TOTAL CHANGES	35	49	79	58	510

FIGURE 7. WLN Monthly Cost Breakdown by Function and Product, Fiscal Year 89/90

MONTH:	Jul/89	Aug/89	Sep/89	AVERAGE	PY TOTAL

CATALOGING					

INQUIRIES	\$2,024.30	\$2,689.73	\$2,779.60	\$2,862.95	\$28,629.48
ATTACH HOLDINGS	\$309.30	\$366.00	\$311.40	\$381.99	\$3,819.90
RCP (ORDER CARDS)	\$171.00	\$252.30	\$184.05	\$202.98	\$2,029.80
INPUT NEW RECORDS	\$52.80	\$76.50	\$125.00	\$109.62	\$1,096.20
WLN RECON INPUT	\$224.50	\$0.00	\$1,125.70	\$458.00	\$2,748.00
CATALOG CARDS	\$209.60	\$309.76	\$235.12	\$226.60	\$2,266.00
TERMINAL MAINTENANCE	\$125.00	\$125.00	\$125.00	\$125.00	\$1,250.00
TERMINAL CONNECT CHARGE	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$10,000.00

CATALOGING TOTAL	\$4,116.50	\$4,819.29	\$5,885.87	\$4,236.62	\$50,839.38

ILL:					

INQUIRIES	\$404.86	\$538.87	\$555.92	\$572.68	\$5,726.82
ILL REQUESTS	\$143.00	\$157.30	\$183.30	\$218.79	\$2,187.90
ILL LOANS	(\$52.25)	(\$66.00)	(\$64.25)	(\$85.60)	(\$856.00)
REPORTS	\$88.61	\$0.00	\$0.00	\$47.19	\$377.55
TERMINAL MAINTENANCE	\$25.00	\$25.00	\$25.00	\$25.00	\$250.00
TERMINAL CONNECT CHARGE	\$200.00	\$200.00	\$200.00	\$200.00	\$2,000.00

ILL TOTAL	\$809.22	\$855.17	\$899.97	\$807.19	\$9,686.27

ACQUISITIONS:					

INQUIRIES	\$404.86	\$538.87	\$555.92	\$572.68	\$5,726.82
ORDERS	\$522.30	\$1,380.40	\$1,866.85	\$1,210.75	\$12,107.45
REPORTS	\$489.09	\$472.29	\$346.53	\$750.13	\$7,501.33
TERMINAL MAINTENANCE	\$25.00	\$25.00	\$25.00	\$25.00	\$250.00
TERMINAL CONNECT CHARGE	\$200.00	\$200.00	\$200.00	\$200.00	\$2,000.00

ACQUISITIONS TOTAL	\$1,641.25	\$2,616.56	\$2,994.30	\$2,298.80	\$27,585.60

LASERCAT	\$0.00	\$0.00	\$1,224.00	\$4,488.50	\$17,954.00

TELECOMMUNICATIONS	\$10.00	\$385.45	\$385.45	\$347.90	\$3,479.05

EQUIP, TRAINING, MANUALS	\$0.00	\$0.00	\$0.00		\$0.00

MONTHLY TOTAL	\$6,576.97	\$8,676.47	\$11,389.59	\$9,128.69	\$109,544.30

important, although not necessarily from the point of view of those in the cataloging department, is that statistics on the size and nature of the library's collection are requested by the library administration and by outside agencies such as ACRL. These figures allow us to compare ourselves to our peer institutions and give a general idea of strengths and weaknesses in the collection.

The second reason for keeping statistics is more important to the cataloging department itself, and that is to monitor the productivity of individuals and of cataloging as a whole. This brings up a weakness with nearly any system of keeping cataloging statistics, and a controversial aspect of the whole process. Some people feel threatened by the idea of measuring their productivity in this sometimes crude and arbitrary way. They may feel that a gross count of certain tasks is a too easy and convenient way of judging them which may not reflect a true picture of their productivity, since inevitably not all tasks are counted, and since there is no explicit way of measuring difficulty of the task or quality of the result. Managerial staff must balance the time it takes to record, compile and interpret statistics against the need for the information and the need of staff to have their activities reflected in a tangible way.

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