

**The Role of Macro Express in Generating Catalog Statistics** [Aleph Breakout Session]

301-B Jason Fleming (*University of Florida, Technical Support*); Betsy Simpson, (*University of Florida*); Jen Green (*University of Michigan*), Moderator Say goodbye to pencil and paper! The University of Florida Cataloging and Metadata Department is using macros to create Trigger Reports to generate cataloging statistics. Macros make the process more efficient and capture much more data. Macro Express accesses our catalog to retrieve additional information such as the call number and location.

Jason Fleming: “Mr. Macro”

Betsy Simpson

University of Florida

Cataloger input must be used since automation system cannot reliably determine what a ‘cataloged’ item is

Using triggers to enhance recording of statistics

- HOL record is where the trigger for stats is added
- Supply a macro that is run when cataloging is completed
- Also a macro run against the trigger report

Macro demo

- Macro suite to choose which is the unit of affiliation
- Macro calls up a trigger record which prompts the user for input
- All information for questions in the macro are incorporated in the text of the trigger

Macro setup

- Setup cataloging units – pc\_tab\_exp\_field.eng
- Review existing stats categories
  - Revise existing stat definitions
  - Add any new / needed stats
- Standardize text strings
  - Establish a reference guide for catalogers which includes the ‘key’ to the prefixes that were defined in the creation of the stats
  - The ones demoed were mainly-preexisting
- Creating unit-specific macros
  - Allowed assignment of unit affiliations—no miskeys, or worry about proper selection of input data
- Pilot project launched
  - Some resistance by some catalogers
    - makes too complicated
    - I might forget, my stats will be lower
    - Reliability concerns
    - “big brother” fears
  - Concerns addressed by highlighting the value-added results
  - Included menu options for defaults

- --if there is any variation, does this automatically save the defaults and therefore if use of 'defaults' doesn't trigger some analysis on behalf of cataloger, could stats then be recorded incorrectly until the next variation
  - There is a way to check if the trigger was run by the cataloger
  - Validation prompt created to remind cataloger to run the macro
- Review of macro script—sharable on request
- Prompt at the end of the stats also prompts to add to 'new title list' by running new title macro after trigger macro
  - Public services lets the new field stay in the record for 120 days
  - A script is run. The 'new' tag content is changed to 'old' by a script / batch program

#### Trigger report elements

- Adding data that is desired from the z13 table
- TKRs (ticklers) added to HOL record during the work flow
- Ret-03 report provides all the data needed
- Macro express file processing feature draws out the necessary fields
  - Diff on text files (compare.txt)
  - Produces a .ini file
  - Merge the .ini file and a .txt file from the reports in Excel
- Still working on the stats breakout
  - By units
  - For ARL statistics
    - Pulling out the data on the sublibrary and collection code for the reporting of annual statistics / counts

#### Statistics database

- Unit heads are to record in the Access database
- Considering the automation of data loading into the historical base

#### URL for presentation:

[http://www.uflib.ufl.edu/acqlic/tc/eluna/statistics\\_for\\_cataloging-3.ppt](http://www.uflib.ufl.edu/acqlic/tc/eluna/statistics_for_cataloging-3.ppt)

- Will add a link to all the macros when ppt is loaded to the conference proceedings

#### What do you do with shelf-ready materials?

We do get shelf-ready and we count that in acquisitions. The acq dept reports the statistics. Some double counting occurs with shared copy—acq and the macro is recording the piece; the shelf-ready has it incorporated into their tickler