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Collection Engagement with Create Lists and Excel: Tips for a Perfect Match

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Collection Engagement with Create Lists and Excel: Tips for a Perfect (=If(IsError)) Match
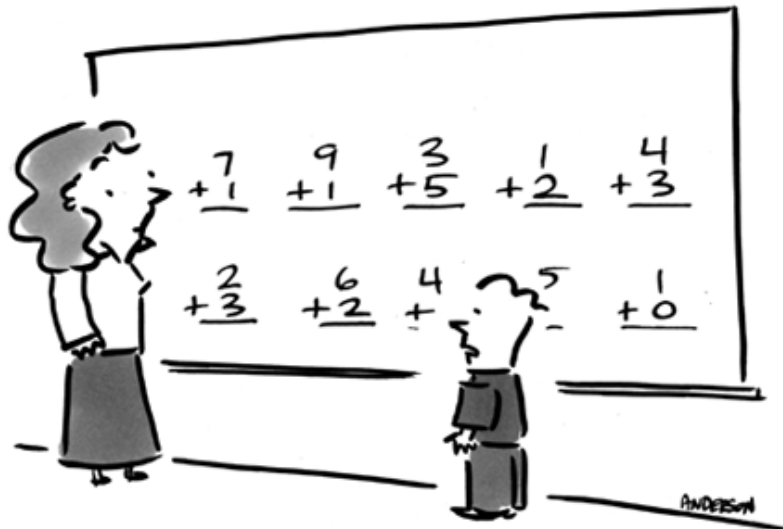
Richard Wisneski

Assistant Director, Digital Resources & Discovery Services
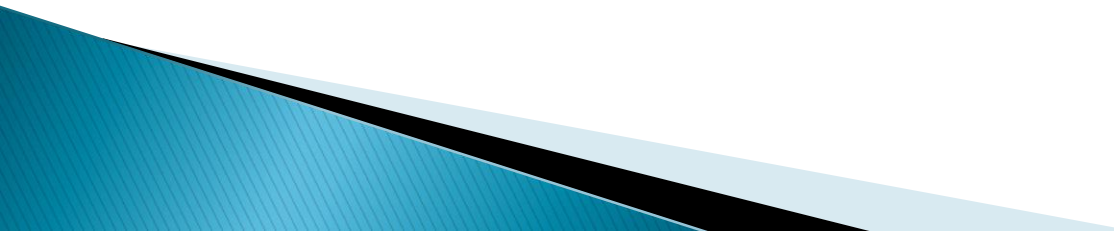
Cleveland State University

Michael Schwartz Library
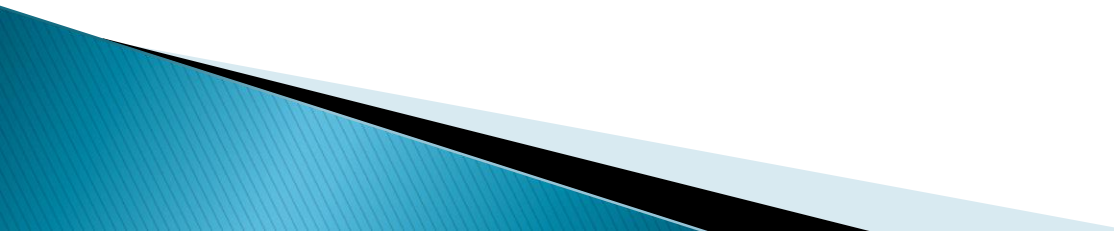
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Outline

- Quick, Easy, Simple Queries in Millennium/Sierra

- Preliminary, But Easy Excel Setup and Practices

- Useful, Easy Functions

- (Easy?) Questions

But First…

- What follows is intended for those who consider themselves to have some knowledge of Excel, but do not consider themselves to be experts
  - if, for example, you know how to create Macros, this may not be the presentation for you.

- These are the practices and tips I've found useful. Some may know of other, maybe better ways to do some things in Excel

- These are just SOME tips, practices, functions, intended for those who want to generate reports or compile statistics.

Quick, Easy, Simple Queries

A Few Examples

What could be problematic with the following?

- I want to find bibliographic monograph print records in our system from this fiscal year that do NOT have order records. I write:

bib mat type=a and bib level = m and cat date between 7-1-2012 and 6/30/2013 and bib does not exist to order

- I want to find the number of checkouts of books in N for FY12 I write:

INDEX LC/NLM between N and O. ITEM LOCATION starts with "S" AND ORDER ODATE between "07-01-2012"and "04-22-2013"

- How would I find out how many monographs in Special Collections have an imprint date between 1800 and 1900?

Takeaways

▸ Keep queries as short and simple as possible – let Excel do the work for you

▸ The longer and more complex the query, the greater the risk of missing data

▸ Of course, depends on size of holdings, number of empty review files, and size of review files

▸ Export as much data as you can – you can always get rid of what you don't need in Excel

▸ Save queries and exports that work well

Preliminary, Easy Excel Setup and Practices
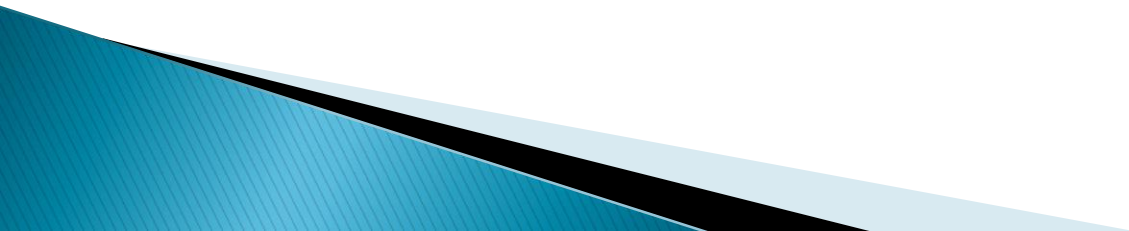
Case Study

▸ I want to examine order records for all of our electronic resources in Millennium / Sierra

Query:

Order Query
ORDER FORM equal to "e"   OR BIBLIOGRAPHIC
MARC Tag 856 has "http"   OR BIBLIOGRAPHIC
MARC Tag 956 has "http"

▸ Export as much information as you can from order and bib records. Why? Because later, eliminate what you don't need in Excel

Preliminary Work

- Get ASAP Utilities! http://www.asap-utilities.com
  - <u>Why?</u> Many commonly used formulas in Excel are built in, such as for concatenating, equations. Formatting is extremely easy, such as for for alpha case, dates, cells. Trimming cells – no more trim right, left. Deduping. And much, much more

- Put data in Tables. Cntrl + N + T
  - <u>Why?</u> Easy for filtering, adding columns, inserting a formula in a column

- Have a Word Doc, Text File, or other Word Program open
  - <u>Why?</u> Every time you figure out how to do something in Excel, write it down.

Best Practice

▸ Create a KEY worksheet

QUERY:
Order
ORDER FORM equal to "e" OR BIBLIOGRAPHIC MARC Tag 856 has "http" OR BIBLIOGRAPHIC MARC Tag 956 has "http"
Original spreadsheet: 'erecordsMASTER'

'erecordsMASTER(2)'.
EXCEL WORK:
- translation tables used for location, vendor code, bib lvl, mat type, order status, etc.
- Removed all order status=cancelled. Total: 714
- Removed all order form=print AND order fund does not have (e) AND order fund does not have serial-electronic
 AND MARC 099 not equal to electronic book AND bib location does not have www. Total: 120
- Removed 2 order form=DVD
5,0004 TOTAL
- highlight dups on bib records
- sort on bib record dups, then number A-Z

'pivotTableFor(2)'
Use Call number filter. Formula: c* -- will get you all call numbers in C (n.b. select 'multiple items" box) OR filter "begins with"

'sandboxFor(2)' -- analysis work for 'erecordsMASTER(2)'

'dashboard' -- Charts and Graphs from sandbox/Analysis work

| | KEY | erecordsMASTER | erecordsMASTER (2) | pivotTableFor(2) | sandboxFor(2) | dashboard |

Why?
This can document the query you ran, and what exactly is contained within your Excel file.
You can also document what you did within the worksheets – e.g. what formulas you ran, what filters you created. Etc.

Best Practice Continued

- Create a MASTER worksheet

Usage by Member and Content Type

Report Generated: 16 January 2014 10:05 PM
Date Range: 01 January 2013 to 31 December 2013
OXFORD
OhioLINK: Institution Report
Shows how much each institution requested of each content type.

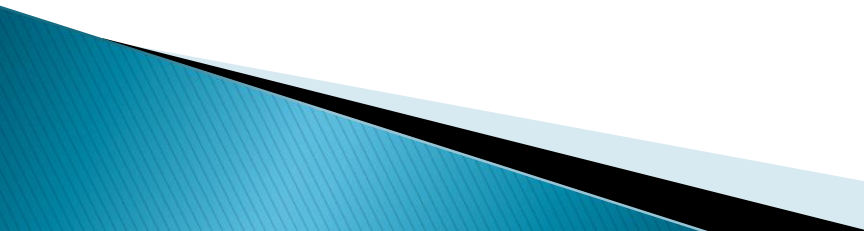| Institution	Searches	Home Pages	All TOC	Current TOC	Abstract	HTML
Total for all Institutions	16699	181320	27106	6991	321421	111507
Antioch College	31	54	46	8	463	69
Ashland University	7	11	12	5	233	128
Athenaeum of Ohio	0	0	0	0	0	0
Baldwin-Wallace College	31	150	28	8	1139	448
Belmont Technical College	0	0	2	2	52	30
Bluffton University	7	14	9	3	185	91
Bowling Green State University	810	2350	665	116	7695	2037
Capital University	36	59	17	5	480	204
Case Western Reserve University	1456	20540	2457	663	34474	9972
Cedarville University	41	224	41	5	1145	668
Central Ohio Technical College	8	51	2	2	288	128
Central State University	8	51	2	2	288	128
Cincinnati Christian University	0	0	0	0	0	0
Cincinnati State Technical &Community College	18	18	14	6	252	142
Clark State Community College	0	5	0	0	122	38
Cleveland Clinic Alumni Library	1321	7204	2662	679	26510	13125
Cleveland State University	119	577	224	62	3747	1017
College of Mount St. Joseph	0	0	0	0	0	0
College of Wooster	190	862	188	79	4033	1263
Columbus College of Art and Design	0	0	0	0	0	0
Columbus State Community College	9	122	38	21	636	365
Cuyahoga Community College	22	32	14	8	637	367
Defiance College	0	0	0	0	0	0
Denison University	277	1256	302	71	3987	1100
Edison Community College	1	15	0	0	85	32
Franciscan University of Steubenville	47	122	31	15	561	329
Franklin University	14	14	7	4	217	60
Heidelberg College	4	19	14	3	320	121
Hiram College	13	31	46	5	677	290
Hocking College	4	3	0	0	71	53
Jefferson Community College	1	0	2	1	50	35
John Carroll University	96	184	65	18	1365	469
Kent State University	617	5864	633	206	13993	3952
Kenyon College	0	0	0	0	0	0
Lakeland Community College	1	4	2	2	83	29
Lorain County Community College	18	22	8	1	308	166
Lourdes College	1	7	2	0	189	89

KEY | MASTER | MASTER (2) | pivotTbl-(2) | pivotCht-(2) | MASTER (3) | chart(3) | +

Why?
You can copy this spreadsheet, but keep the MASTER intact in case, on future work, you lose or forget a step you did

Learn Index and Match

Advantages to Index-Match to VLookup:

- Index-match is more flexible and faster than vlookup
- Vlookup's data range is limited to a table
- Vlookup always searches the leftmost column of the specified table to find the lookup value
- Vlookup provides a very limited approximate match feature
- Vlookup can provide false results if the table is not sorted in ascending order
- Index returns the value at the intersection of a row and column in a given range
- Match returns a position of an item in an array that matches a value

Index and Match in Action

USE THIS FORMULA IN EXCEL WHEN TRANSLATING CODES (See 'Excel Tips and Tricks')
Change 'L2' in these forumuas accordingly when using in Excel

```
=INDEX(ordAcqType!$B$2:$B$13, MATCH(L2,ordAcqType!$A$2:$A$13,0))
=INDEX(ordType!$B$2:$B$15, MATCH(L2,ordType!$A$2:$A$15,0))
=INDEX(fundCode!$B$2:$B$507, MATCH(L2,fundCode!$A$2:$A$507,0))
=INDEX(VendorCodes!$B$2:$B$458, MATCH(L2,VendorCodes!$A$2:$A$458,0))
=INDEX(ordForm!$B$2:$B$26, MATCH(L2,ordForm!$A$2:$A$26,0))
=INDEX(ordStatus!$B$2:$B$12, MATCH(L2,ordStatus!$A$2:$A$12,0))
=INDEX(itemStatus!$B$2:$B$26, MATCH(L2,itemStatus!$A$2:$A$26,0))
=INDEX(itemTLOC!$B$2:$B$5, MATCH(L2,itemTLOC!$A$2:$A$5,0))
=INDEX(LocCodes!$B$2:$B$144, MATCH(L2,LocCodes!$A$2:$A$144,0))
=INDEX(LstatusCodes!$B$2:$B$7, MATCH(L2,LstatusCodes!$A$2:$A$7,0))
=INDEX(LtypeCodes!$B$2:$B$8, MATCH(L2,LtypeCodes!$A$2:$A$8,0))
=INDEX(EresStatusCodes!$B$2:$B$8, MATCH(L2,EresStatusCodes!$A$2:$A$8,0))
=INDEX(EresRightsTypes!$B$2:$B$8, MATCH(L2,EresRightsTypes!$A$2:$A$8,0))
=INDEX(EresAdminGrp!$B$2:$B$10, MATCH(L2,EresAdminGrp!$A$2:$A$10,0))
=INDEX(bibMatType!$B$2:$B$17, MATCH(L2,bibMatType!$A$2:$A$17,0))
=INDEX(bibLvl!$B$2:$B$8, MATCH(L2,bibLvl!$A$2:$A$8,0))
=INDEX(bibSuppress!$B$2:$B$5, MATCH(L2,bibSuppress!$A$2:$A$5,0))
=INDEX(ITypeCodes!$B$2:$B$28, MATCH(L2,ITypeCodes!$A$2:$A$28,0))
```

This Excel File consists of codes and their translations for:
NOTE: **COPY TABS TO OTHER EXCEL FILES** -- NEVER MOVE ANY TAB IN THIS EXCEL FILE WITHOUT COPYING

ORDER
  acq type
  ord type
  fund code -- with speed types
  form
  status
ITEM
  status
  itype
  TLOC
  location codes (n.b. applicable to all)
LICENSE
  status
  type
E-RESOURCES
  status
  rights types
  admin group
BIBLIOGRAPHIC
  mat type
  bib level
  suppress

SHORTCUT KEYS (last spreadsheet in this Excel file)
Use esp. when exporting for:
order
item
bib
eresource
license

IMPORTANT POINT! Copy-and-Paste worksheets and formulas. Do NOT cut-and-paste

What I did

▸ I went through the order, item, bib, checkin records, etc. and created what I call 'translation tables'

▸ Next, I created this formula:

=INDEX(ordAcqType!$B$2:$B$13, MATCH(L2,ordAcqType!$A$2:$A$13,0))

▸ I copied this formula, and adjusted the range of the translation table for subsequent tables: $B$13 AND $A$13

▸ I also adjusted the name: ordAcqType!

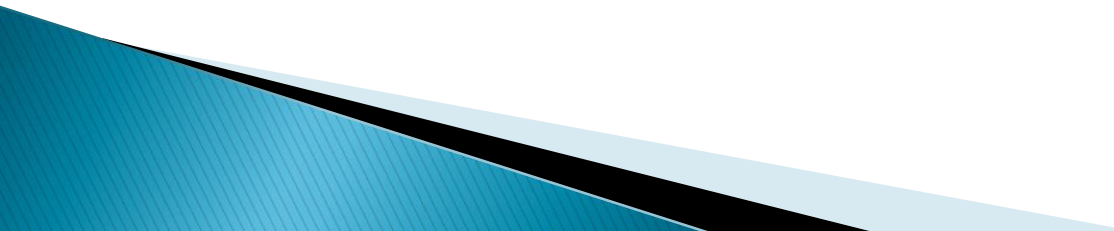| ACQ TYPE	TRANSLATION
p	purchase
g	gift
n	noCharge
x	exchange
r	exchPurchase
d	depository
t	deposAcct
b	prepaid
c	comes with
l	lease
z	other
1	EMPTY

In Excel Workbooks:

- Create a column alongside codes
- Plug in corresponding formula
- Adjust that "L2" you saw earlier to correspond with the column you're translating
- Use copy-paste special in new column – so content isn't formula-dependent

Takeaways

Recommendations:
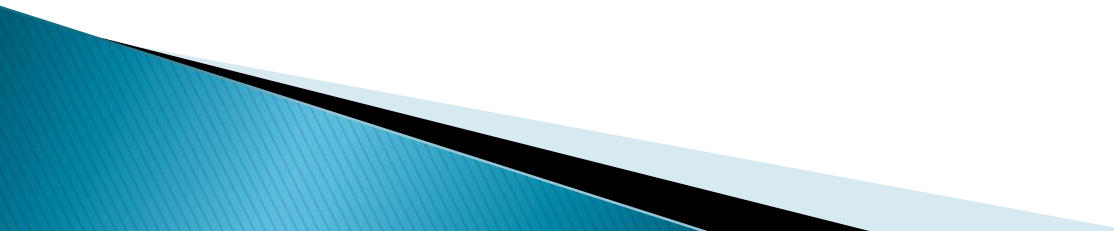
- Explore ASAP Utilities – can save you time, especially in regards to formulas, calculations, cleanup
- Document what you do in Excel
- Create KEY worksheet – beneficial to you and your audience
- Set up translation tables and use with index-and-match. Again, beneficial to your audience

Useful, Easy Functions

Pivot Tables and Charts

Why?

- Easy to create
- Easy to experiment with
- Quick, easy calculations. Quick, easy graph creation
- Easy to sort

Example:

Pivot Chart:

Row Labels	Sum of Searches
Ohio State University	5229
University of Cincinnati	2060
Case Western Reserve University	1456
Cleveland Clinic Alumni Library	1321
Bowling Green State University	810
Miami University	726
Ohio University	628
Kent State University	617
Wright State University	602
University of Toledo	444
Denison University	277
Northeastern Ohio Universities College of Medicine	270
Oberlin College	218
College of Wooster	190
University of Akron	187
University of Findlay	140
Youngstown State University	140
University of Dayton	133
Cleveland State University	119
Medical College of Ohio	99
John Carroll University	96
Ohio Northern University	83
Xavier University	67
Otterbein College	54
Franciscan University of Steubenville	47
Mount Vernon Nazarene University	45
Cedarville University	41
Ohio Dominican University	40
Sinclair Community College	38
Marietta College	36
Capital University	36
Wittenberg University	32
Baldwin-Wallace College	31
Antioch College	31
Ohio Wesleyan University	28
Malone College	23
Cuyahoga Community College	22
Shawnee State University	19
Lorain County Community College	18

Total

Chart filtered to show only those greater than 10. Chart sorted in descending order, by sum of searches

To make this chart easier to read:
Under Pivot chart Tools, select Layout, and then under Axes, select Primary Vertical Axis, and 'show axis with log scale
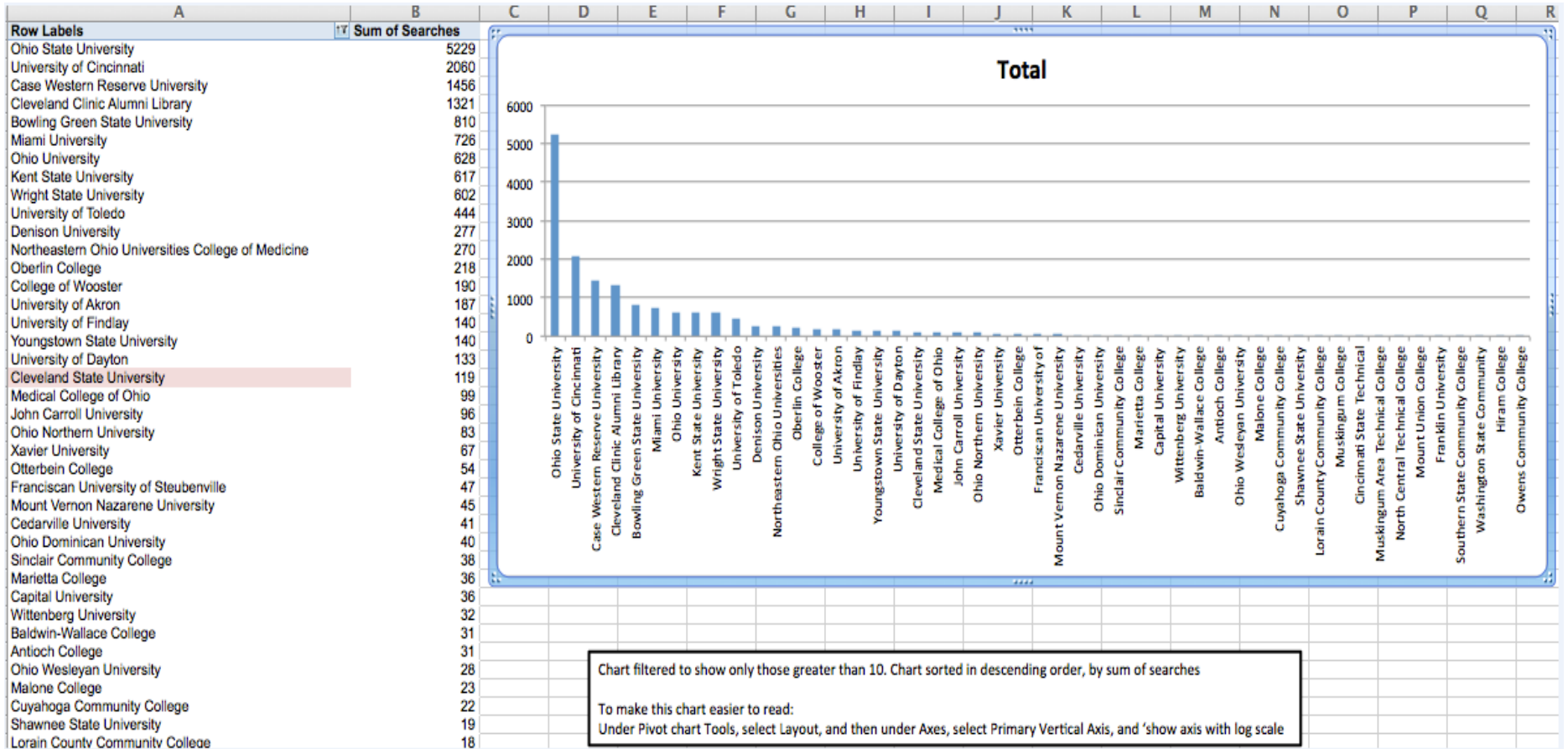
Sparklines

What?
- Quick snapshot of data from multiple columns

Why?
- Easy way to see data over time

- How
1. Put at end of column when you have multiple columns of data
2. Insert → line
3. For date range, select all the rows in order that contain values to capture

Example

Title	Reporting Period Total	Jul-2013	Aug-2013	Sep-2013	Oct-2013	Nov-2013	Dec-2013	Jan-2014	Feb-2014	Mar-2014	Apr-2014	May-2014	Jun-2014	Sparkline
1/pi to 1.000.000 Digits (1 Divided by Pi)	1	0	0	0	1	0	0	0	0	0	0	0	0	
100 Ideas for Primary Teachers: Developing Thinking Skills	1	0	0	0	0	0	0	0	0	0	0	0	1	
101 Ways to Run the Option	2	2	0	0	0	0	0	0	0	0	0	0	0	
The 108 Skills of Natural Born Leaders	2	0	0	1	0	0	0	0	0	0	1	0	0	
The 2000-2005 World Outlook for Frozen Ready Meals and Pizzas	1	0	0	0	0	1	0	0	0	0	0	0	0	
The 2000-2005 World Outlook for Rubber Tires for Cars	1	0	0	0	1	0	0	0	0	0	0	0	0	
The 2000-2005 World Outlook for Soft Drinks	1	0	0	0	1	0	0	0	0	0	0	0	0	
The 2002 Official Parent's Sourcebook on Sudden Infant Death Syndrome	1	0	0	0	1	0	0	0	0	0	0	0	0	
The 2002 Official Patient's Sourcebook on Lupus	1	1	0	0	0	0	0	0	0	0	0	0	0	
The 2002 Official Patient's Sourcebook on Muscular Dystrophy	1	0	0	0	0	1	0	0	0	0	0	0	0	
The 2002 Official Patient's Sourcebook on Sickle Cell Anemia	1	0	0	1	0	0	0	0	0	0	0	0	0	
201 Best Questions to Ask on Your Interview	1	0	0	1	0	0	0	0	0	0	0	0	0	
30-Day Low-carb Diet Solution	1	0	0	0	0	0	0	0	0	1	0	0	0	
50 Self-help Classics: 50 Inspirational Books to Transform Your Life	3	0	0	0	0	3	0	0	0	0	0	0	0	
68 letters to and from Jefferson, 1805-1817	1	0	0	0	0	0	0	0	0	1	0	0	0	
9 Natural Laws of Leadership	12	0	4	5	3	0	0	0	0	0	0	0	0	
Abortion: A Reference Handbook (Contemporary world issues)	1	0	0	0	0	1	0	0	0	0	0	0	0	
Abortion, Moral and Legal Perspectives	1	0	0	0	0	0	0	0	0	0	1	0	0	
Action Research: Principles and Practice	1	0	0	0	0	0	0	1	0	0	0	0	0	
ADD/ADHD Alternatives in the Classroom	1	0	0	0	0	0	0	0	0	1	0	0	0	
Adipose Tissue (Medical Intelligence Unit)	2	0	1	0	1	0	0	0	0	0	0	0	0	
Adult Learning and Development: Perspectives from Educational Psychology (Educational psy	1	0	0	0	0	1	0	0	0	0	0	0	0	
Adult Severe Mental Illness	1	0	0	0	0	0	0	0	0	1	0	0	0	
Advanced Abnormal Child Psychology	1	0	0	0	0	0	1	0	0	0	0	0	0	
Advanced Calculus With Applications in Statistics (Wiley series in probability and statistics)	1	0	0	0	1	0	0	0	0	0	0	0	0	
Advances in Chemical Physics, Volume 126	1	0	0	0	1	0	0	0	0	0	0	0	0	
Advances in Chromatography. Vol. 40 (Advances in chromatography; v. 40)	1	0	0	0	0	0	0	0	0	0	0	0	1	
Advances in Lithium-Ion Batteries	6	0	0	6	0	0	0	0	0	0	0	0	0	
Advances in the Mechanics of Plates and Shells: The Avinoam Libai Anniversary Volume (Solid	2	0	0	0	0	0	0	1	1	0	0	0	0	
African-American Writers: A Dictionary	2	0	0	0	0	0	0	0	0	0	2	0	0	
Agent-centered Morality: An Aristotelian Alternative to Kantian Internalism	1	0	0	1	0	0	0	0	0	0	0	0	0	
AIDS, Drugs and Prevention: Perspectives on Individual and Community Action	1	0	0	0	0	0	0	0	1	0	0	0	0	
American Dietetic Association Guide to Healthy Eating for Kids: How Your Children Can Eat Sr	1	0	0	0	0	0	0	0	1	0	0	0	0	
American Environmental Leaders. Vols. 1 and 2	1	1	0	0	0	0	0	0	0	0	0	0	0	
American Fish and Wildlife Policy: The Human Dimension	1	1	0	0	0	0	0	0	0	0	0	0	0	
The American Heritage Book of English Usage (Book of English Usage)	1	0	0	0	0	0	0	0	0	0	0	0	1	

Comparison Formula

Why?
▸ Common to want to see differences between titles, or data

How?
1. put data in column 1 and column 3
▸ create empty column between the 2
2. put formula in the middle column
▸ =IF(ISERROR(MATCH(A2,$C$2:$C$5,0)),"",A2)
3. start with 1st cell that has data -- this is your A1
4. c5 is the very last cell that has data
5. For TEXT, use ASAP utilities to trim cells, eliminate characters such as &, -, and articles such as 'the,' 'a,' 'an'
6. Also for TEXT, make case uniform

▸ N.B. In running this formula, you want to compare the LONGER list to the SHORTER list (i.e. "A2" should be for the long list, $C$2 should be for the short list)

Example

=IF(ISERROR(MATCH(B6,$D$2:$D$224750,0)),"",B6)

SIERRA TITLES	COMPARE	EBSCO TITLES
ECONOMIC FORUM		chinese journal of aeronautics
ear and hearing	ear and hearing	daoism religion history and society
international journal of instructional media	international journal of instructional media	thought and words journal of the humanities an
EXCEPTIONAL CHILD		ppetatud eesti seltsi aastaraamat annales littera
BULLETIN OF PSYCHONOMIC SOCIETY		that s art
TEACHING ENGLISH IN TWO-YEAR COLLEGE		a journal of african migration
kenyon review	kenyon review	1 000 bags tags and labels distinctive designs for
TAX MANAGEMENT INTERNATIONAL JOURNAL		1 000 food art and styling ideas mouthwatering
american demographics	american demographics	1 000 garment graphics a comprehensive collect
JOURNAL OF AMERICAN PLANNING ASSOCIATION		1 000 graphic elements special details for distin
CONSUMER TRENDS		1 000 greetings creative correspondence design
REGIONAL SCIENCE PERSPECTIVES		1 000 icons symbols and pictograms visual comr
50 PLUS		1 000 ideas by 100 manga artists
BEHAVIORAL COUNSELING QUARTERLY		1 000 ideas for graffiti and street art murals tags
american organist	american organist	1 000 illustrations for children amazing art mad
MUNICIPAL MANAGEMENT		1 000 indie posters
peace and change	peace and change	1 000 more greetings creative correspondence f
popular science	popular science	1 000 music graphics a compilation of packaging
ALCOHOL HEALTH AND RESEARCH WORLD / NATIONAL INSTITUTE ON ALCOHOL ABUSE AND ALCOHOLISM		1 000 package designs a comprehensive guide t
NACLA REPORT ON AMERICAS		1 000 poses in fashion
journal of portfolio management	journal of portfolio management	1 000 product designs form function and techno
crafts report	crafts report	1 000 restaurant bar and cafe graphics from sig
ohio media spectrum	ohio media spectrum	1 000 retail graphics from signage to logos and
BULLETIN OF INSTITUTE OF HISTORICAL RESEARCH. SPECIAL SUPPLEMENT		1 000 type treatments from script to serif letter
EPA JOURNAL / UNITED STATES ENVIRONMENTAL PROTECTION AGENCY, OFFICE OF PUBLIC AWARENESS		1 001 celestial wonders to see before you die th
AFRICANA JOURNAL		1 001 symmetrical patterns a complete resourc
public personnel management	public personnel management	1 1986 ieee standard general principles for temp
organizational dynamics	organizational dynamics	1 2000 ieee recommended practice general prin
EARLY YEARS		1 800 flowers com inc swot analysis
JOURNAL OF VIOLIN SOCIETY OF AMERICA		1 brief 50 designers 50 solutions in fashion desig
exercise and sport sciences reviews	exercise and sport sciences reviews	1 pi to 1000000 digits
journal of career education	journal of career education	1 samuel a literary reading
british journal of clinical psychology	british journal of clinical psychology	10 foto workouts
journal of organizational behavior management	journal of organizational behavior management	10 great games and how to use them presentati
DISSEMINATION SERVICES ON MIDDLE GRADES		10 minute consult controlling gerd and chronic
JOURNAL OF CONTEMPORARY STUDIES		10 minute guide to effective business writing
new african	new african	10 minute guide to employee stock option purc
JOURNAL OF PRE-RAPHAELITE STUDIES		10 minute guide to excel 97
JOURNAL OF SOUTH ASIAN AND MIDDLE EASTERN STUDIES		10 minute guide to lotus notes 45
WALL STREET REVIEW OF BOOKS		10 minute guide to lotus notes 46
MULTIPLE LINEAR REGRESSION VIEWPOINTS		10 minute guide to lotus notes mail 46
JOURNAL OF FINANCIAL RESEARCH : JOURNAL OF SOUTHERN FINANCE ASSOCIATION AND SOUTHWESTERN FIN		10 minute guide to microsoft outlook 98
INDUSTRIAL PHOTOGRAPHY		10 minute guide to microsoft word 97
scandinavian journal of history	scandinavian journal of history	10 minute guide to outlook tm 97
thomas wolfe review	thomas wolfe review	10 minute guide to powerpoint 97
ADMINISTRATION & SOCIETY		10 minute guide to windows nt workstation 40
wall street journal	wall street journal	10 secrets to acing any high school test
MEDICAL ANTHROPOLOGY		10 steps to successful business writing
journal of pragmatics	journal of pragmatics	10 steps to successful presentations
NEW ZEALAND CARTOGRAPHIC JOURNAL		10 steps to successful time management
journal of fluency disorders	journal of fluency disorders	10 steps to successful virtual presentations

Duplication

Why?

▸ To see, for example, multiple orders on one bib record

How?

1. Highlight the column where you want to find duplication
2. Go to Home → conditional formatting
3. Highlight cell rules → duplicate values
4. Select the format and color
5. Do advanced sort:
   ◦ First, by color, then by record number

Example

RECORD #(ORDER)	SELECTOR	RECORD #(BIBLIO)	BIB LOCATION	BIB LEVEL	BIB MAT TYPE	MARC099	CALL NUMBER	DATE	GENRE	TITLE SUBFIELD A
o3276764	pl	b15418856	bierc,zbref	monograph	monograph	Standing order		1978		Dictionary of literary biography
o3276776	pl	b15418856	bierc,zbref	monograph	monograph	Standing order		1978		Dictionary of literary biography
o3199344		b19212628	none	monograph	monograph					Copyright charges - various sources;"Dialog cl
o3652865		b19212628	none	monograph	monograph					Copyright charges - various sources;"Dialog cl
o3694501		b19212628	none	monograph	monograph					Copyright charges - various sources;"Dialog cl
o3389649	pl	b22195300	bierc,zbref,wayne,zwref	monograph	monograph		G103.5 .C658 1998;"G103.5 .C658 1998"	1998		The Columbia gazetteer of the world /
o3389650	pl	b22195300	bierc,zbref,wayne,zwref	monograph	monograph		G103.5 .C658 1998;"G103.5 .C658 1998"	1998		The Columbia gazetteer of the world /
o2110544	rwd	b22247889	World Wide web	monograph	monograph	Electronic Resource	JK1108 .C77	1998		LexisNexis (TM) Congressional
o2512361	jaf	b22247889	World Wide web	monograph	monograph	Electronic Resource	JK1108 .C77	1998		LexisNexis (TM) Congressional
o2712581		b22247889	World Wide web	monograph	monograph	Electronic Resource	JK1108 .C77	1998		LexisNexis (TM) Congressional
o1200021	rd	b24959923	World Wide web	monograph	monograph	Electronic Resource	Z6944.S3	1995?-		JSTOR
o1200082	rd	b24959923	World Wide web	monograph	monograph	Electronic Resource	Z6944.S3	1995?-		JSTOR
o1200112	rd	b24959923	World Wide web	monograph	monograph	Electronic Resource	Z6944.S3	1995?-		JSTOR
o1200306	rd	b24959923	World Wide web	monograph	monograph	Electronic Resource	Z6944.S3	1995?-		JSTOR
o211379x	rwd	b24959923	World Wide web	monograph	monograph	Electronic Resource	Z6944.S3	1995?-		JSTOR
o3158913	rwd	b24959923	World Wide web	monograph	monograph	Electronic Resource	Z6944.S3	1995?-		JSTOR
o3459986	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3459998	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3460009	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3460022	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3460034	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3460046	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3460058	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o346006x	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3460071	pl	b2930099x	World Wide web	monograph	monograph	Electronic Resource	AS8 .G35	200-?-		Gale directory library
o3268068	jg	b31846683	World Wide web	monograph	monograph					International encyclopedia of communication
o3464532	pl	b31846683	World Wide web	monograph	monograph					International encyclopedia of communication
o3540431	JAL	b31846683	World Wide web	monograph	monograph					International encyclopedia of communication
o3280895	pl	b32286417	World Wide web	monograph	monograph					Gale Encyclopedia of Religion online
o3291200	pl	b32286417	World Wide web	monograph	monograph					Gale Encyclopedia of Religion online
o3078322	pl	b32760346	law,www	monograph	monograph	Electronic Resource	K12 .US	2004	Electronic referenc	Serial set (1789-1969)
o3106706	pl	b32760346	law,www	monograph	monograph	Electronic Resource	K12 .US	2004	Electronic referenc	Serial set (1789-1969)
o3302866	pl	b32760346	law,www	monograph	monograph	Electronic Resource	K12 .US	2004	Electronic referenc	Serial set (1789-1969)
o3302878	pl	b32760346	law,www	monograph	monograph	Electronic Resource	K12 .US	2004	Electronic referenc	Serial set (1789-1969)
o3318448	pl	b32837483	World Wide web	monog part	monograph					World newspaper archive - Latin American ne
o331845x	pl	b32837483	World Wide web	monog part	monograph					World newspaper archive - Latin American ne
o3333644	pl	b33345545	World Wide web	monograph	monograph					Naxos Base Collection
o341775x		b33345545	World Wide web	monograph	monograph					Naxos Base Collection
o3354337	jac	b33698399	World Wide web	monograph	monograph	Electronic Book				CRC handbook of chemistry and physics
o3569196	jac/pl	b33698399	World Wide web	monograph	monograph	Electronic Book				CRC handbook of chemistry and physics
o3417840	pl	b35940931	World Wide web	integr resource	monograph	Electronic Resource	E18		Electronic referenc	America's historical imprints
o3417852	pl	b35940931	World Wide web	integr resource	monograph	Electronic Resource	E18		Electronic referenc	America's historical imprints
o3417864	pl	b35940931	World Wide web	integr resource	monograph	Electronic Resource	E18		Electronic referenc	America's historical imprints
o3611851		b42954733	World Wide web	monograph	monograph					
o3661155		b42954733	World Wide web	monograph	monograph					
o3629090	pl	b43403177	World Wide web	monograph	monograph					
o3629107	pl	b43403177	World Wide web	monograph	monograph					
o3694148		b44259086	zzebb	monograph	monograph	Electronic Resource	TP155.2.E58 G744 2011	2011		Green chemistry for environmental sustainab
o3695700		b44259086	zzebb	monograph	monograph	Electronic Resource	TP155.2.E58 G744 2011	2011		Green chemistry for environmental sustainab
o1015783	drb	b15551921	World Wide web	monograph	monograph	Standing order				FASB Subscription
o3284773		b15776256	Science	monograph	monograph		TP9 .E685 1991	1991-1998		Encyclopedia of chemical technology /
o3075874		b17174429	sci,www	monograph	monograph	STANDING ORDER				
o1177011	drb	b17190642	Bierce	monograph	monograph	Standing order		1975		Conference Board, Inc. subscription plan
o2599193		b22505817	World Wide web	monograph	monograph	Electronic Resource				Compendex, 1969-present

Add Hyperlinks

Why?

- If your target audience wants to easily navigate to record in system

How?

1. Create a new column alongside the one with the URLs
2. In the first cell, use this formula: =hyperlink(b2) ['b2' being the first cell with the hyperlink]
3. Paste for remainder of column
4. Create another new column
5. Copy the new hyperlinked column
6. Paste special – values and number formats. Shortcut keys are: alt + H, V, S, U

NOTE: Remember to copy and paste special, value only. Otherwise, cells are reliant on formula created for them. For Hyperlinks, follow step 6 here

One Quick Extra

▸ How to convert roman numerals to numbers (useful if dealing with older material)

1. You have in cell A1 MCMXI
2. In the adjacent cell, the formula is: =MATCH(A1,ROMAN(ROW(INDIRECT("1:3999"))),0)
3. HOWEVER, rather than hit "enter" on your keyboard, you hit cntrl + shift + enter
4. if you have these roman numerals in several rows, you can copy this formula and just paste from that point forward.
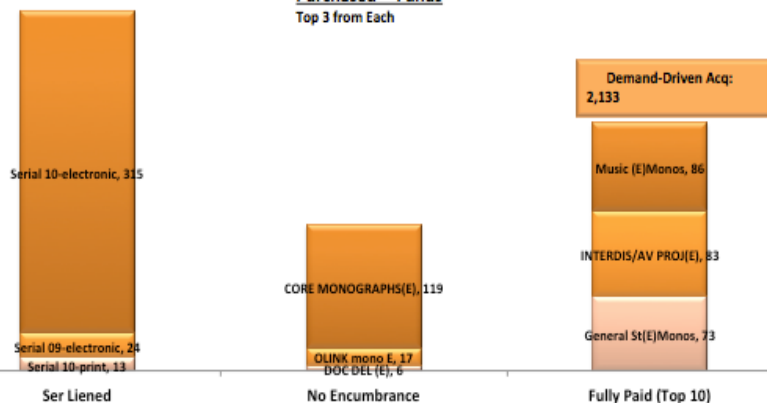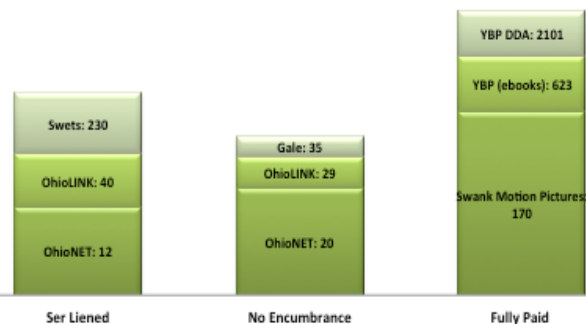
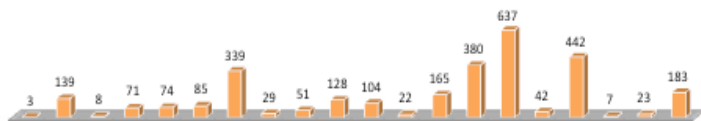# Lastly, Dashboards
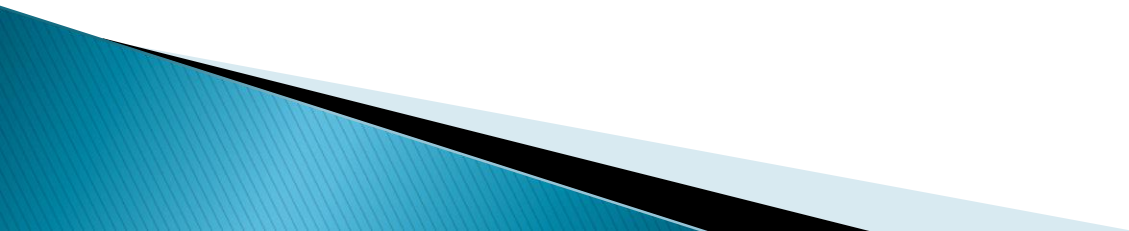
ELECTRONIC-FORMAT RECORDS, THROUGH JUNE 2014
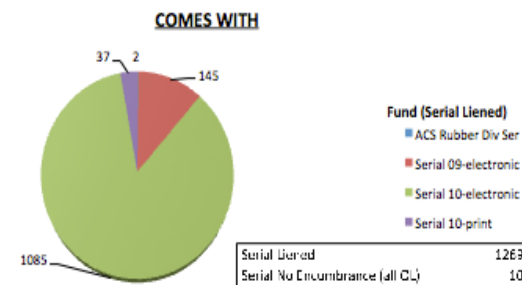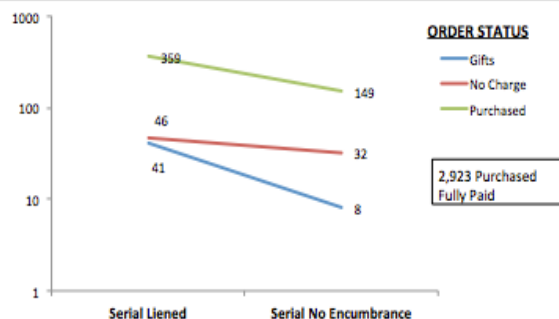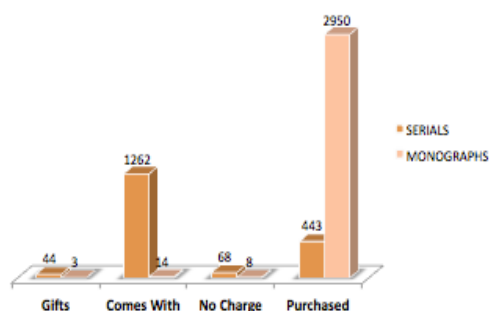
What Was That?

All generated by highlighting parts of prior workbooks in Excel file, and choosing 'Insert Chart' function in Excel, then saving to new worksheet

What NOT to do:
- avoid trendlines
- avoid background colors
- don't use unnecessary legends; they take up too much room
- avoid unnecessary shading, fancy formatting
- reduce noise -- delete grid lines; use data labels instead
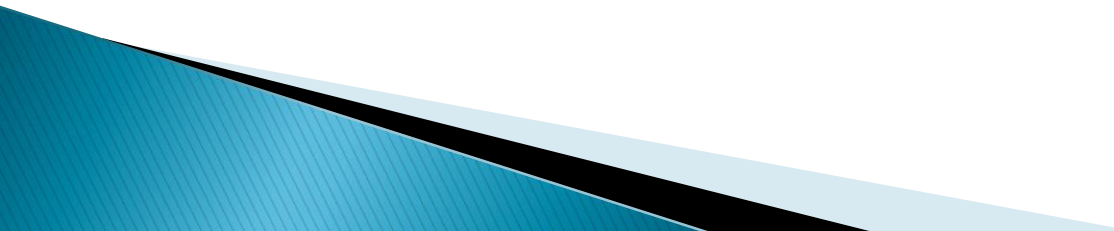- remove axis labels, especially if you're using data labels

- What to do:
- For line charts, start at zero. Plot 2 data sets
- Use data labels rather than axis grids
- Space bars in a bar graph
- Abbreviate common labels, such as months or days of week
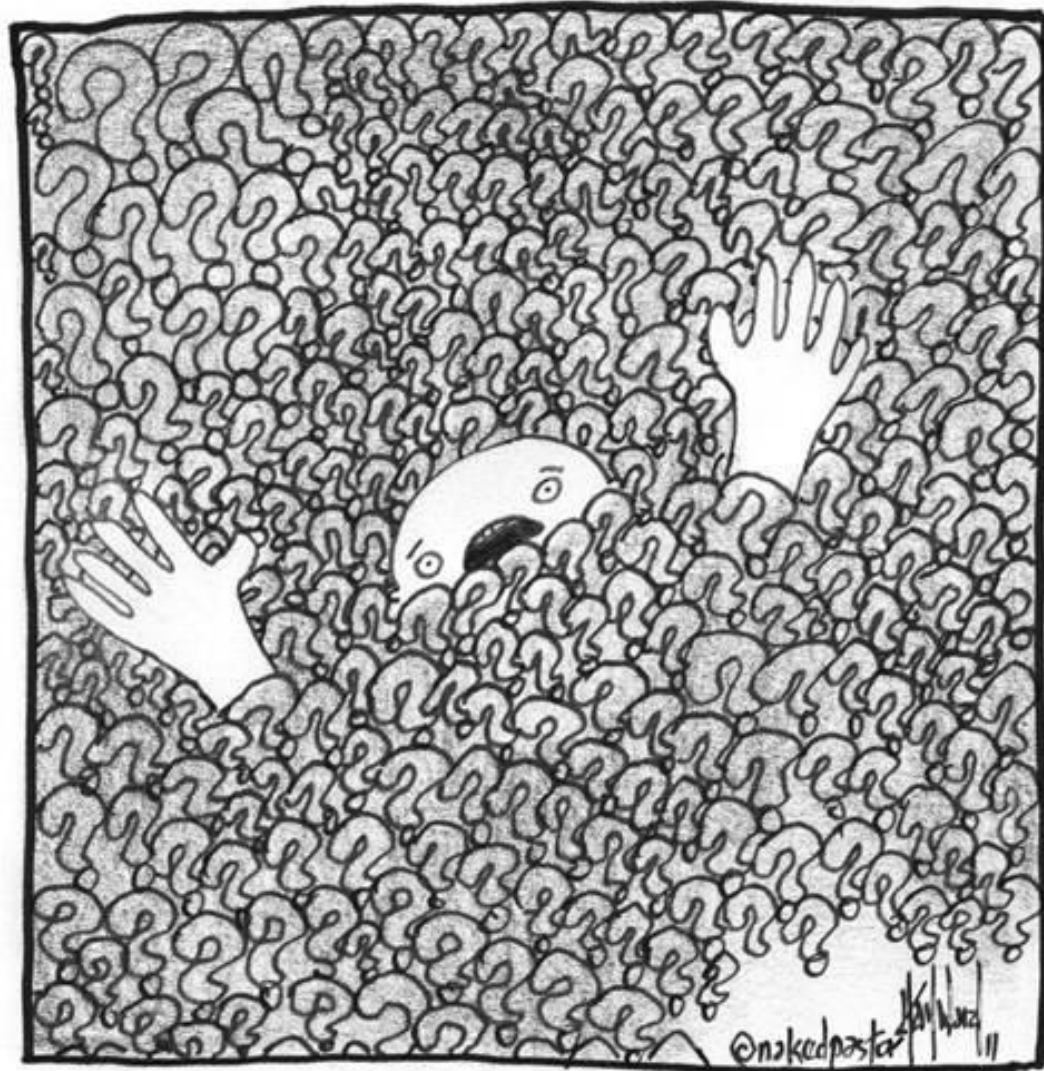- Use nesting labels when you can

And for disparate data...

When you have an additional plot point you want to put in a chart, but its numbers vary drastically from the other chart data

1. Go to Chart Tools – Layout – Axis
2. Choose either Vertical or Horizontal
3. Experiment with one to choose (e.g. Under Pivot chart Tools, select Layout, and then under Axes, select Primary Vertical Axis, and 'show axis with log scale)

THE END – QUESTIONS?

THANK YOU

References (Selected)

- Pivot Table Guy – in youtube
- https://plus.google.com/116259010624364098598/posts
- https://www.youtube.com/user/PivotTableGuy

- https://www.udemy.com/excel-dashboard/
- Microsoft Excel Dashboards & Reports, 2nd Edition (2013). M. Alexander & J. Walkenbach