



USER'S MANUAL

Analytics on Demand (AOD)

Gale, a part of Cengage Learning

December, 2015, v4

Revision Sheet

Release No.	Date	Revision Description
Rev. 1	7/7/14	AOD User's Manual Initial Release
Rev. 1a	7/8/14	Minor screen image changes and corrections
Rev. 1b	7/28/14	Copy edits/formatting
Rev. 2	11/24/14	New AOD site; revisions to existing apps; Marketing Action apps added
Rev 2.1	12/8/14	Addition of section 2.5
Rev 2.2	12/18/14	Addition of Marketing Action input requirements to section 2.5
Rev 3	3/20/15	Addition of Branch Insights/Patron Voter Analysis/Additional free apps
Rev 3.1	9/18/15	Brought all apps up to date with recent user interface changes
Rev 4	12/15/15	Replaced all images with new 10.1 Gallery versions. Replaced "App"/"Application" references with "Workflow" to match new Alteryx terminology.

AOD USER'S MANUAL

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1.0 GENERAL INFORMATION

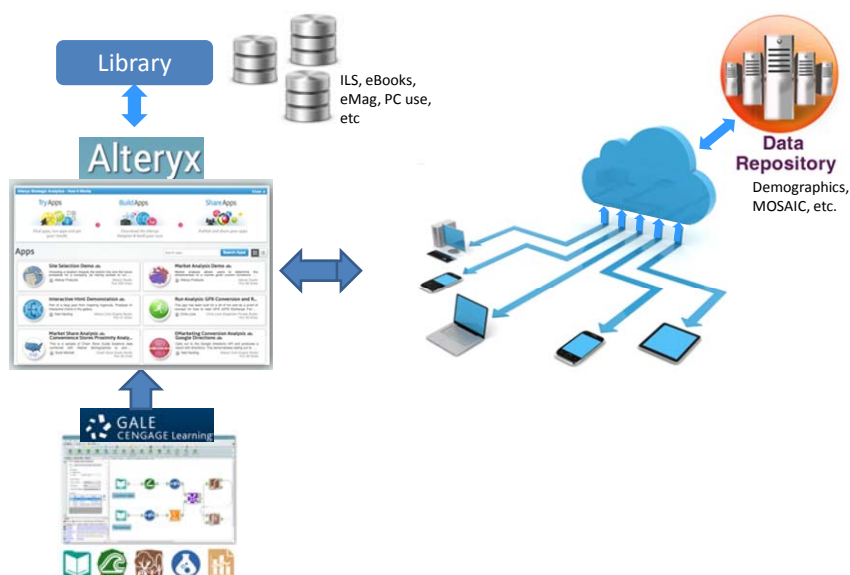
1.0 GENERAL INFORMATION

1.1 System Overview

Analytics on Demand (AOD) is a web-based access product, whereby a library subscribes to specific software workflows (hereafter referred to as “workflows”) to analyze data extracted from electronic platforms used at their library. These platforms can be their Integrated Library System (ILS), their eBook platform(s) like OverDrive and/or 3M, their periodical platform (Zinio), or any other electronic platform that data can be extracted from.

Access to AOD is through the Analytics Gallery via a username/password. Once users log in, they can access workflows that they subscribe to and execute them by uploading data files to the workflows. The data files are transmitted to the cloud via an encrypted data channel, blended with external data, and analyzed, with the output in the form of an executive-style report, complete with tables, charts, and graphs; the report can be downloaded to Excel for further manipulation. These reports can be run in a multitude of variations, based on an individual library’s need. There is no requirement to clean the data before it is uploaded in the workflow, nor is it necessary to send sensitive data outside of the library. Once the workflow completes, the original data file used is automatically deleted. This process is illustrated in Figure 1.

Figure 1. Analytics on Demand Network Diagram



1.2 Points of Contact

1.2.1 Customer Care

As a user of online resources from Gale, part of Cengage Learning, you are provided with an unparalleled level of personalized service and support at no extra cost to your library. Your Customer Care Consultant is with you every step of the way. Gale Customer Care is available to answer questions about:

- Running AOD workflows
- Sample data sets initially validated at setup
- Training

Contact Gale Customer Care at:

- gale.customercare@cengage.com
- Or, email or call your Customer Care Consultant directly

1.2.2 Technical Support

Gale's Technical Support is available for phone support 24 hours a day.

Reach Gale Technical Support at:

- 1-800-877-4253, option 4
- gale.technicalsupport@cengage.com

For additional resources and information, visit: <http://support.gale.com/>

1.3 Organization of the AOD User Guide

The AOD User Guide is organized into five major sections. The first section is *General Information*. The second section, *Getting Started*, provides an overview of all administrative tasks and a general overview of the system. Sections Three through Seven are devoted to each AOD workflow.

1.4 Acronyms and Abbreviations

The following acronyms and abbreviations are used in this document:

- **AOD** – Analytics on Demand
- **CBSA** – Core Based Statistical Area
- **ILS** – Integrated Library System
- **LMS** – Library Management System
- **WORKFLOW** – This is an AOD report/application that you subscribe to. Previously these were known as “Applications”, “Workflows”, or “Reports” in earlier versions of the Gallery (prior to 12/15/2015)

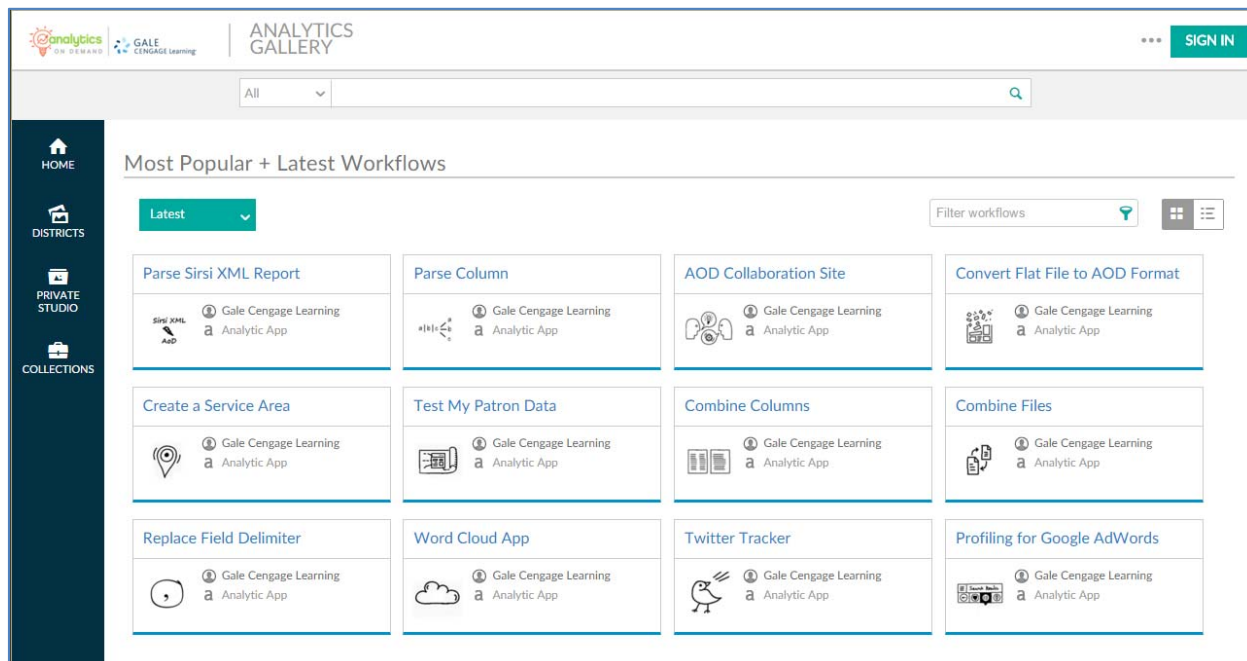
2.0 GETTING STARTED

2.0 GETTING STARTED

This section walks you through the AOD platform system from initiation through exit.

2.1 Logging On and Logging Off

Gale provides access to AOD through usernames and passwords. When you enter AOD—through the Gale- provided URL in your access letter—the following login page appears:



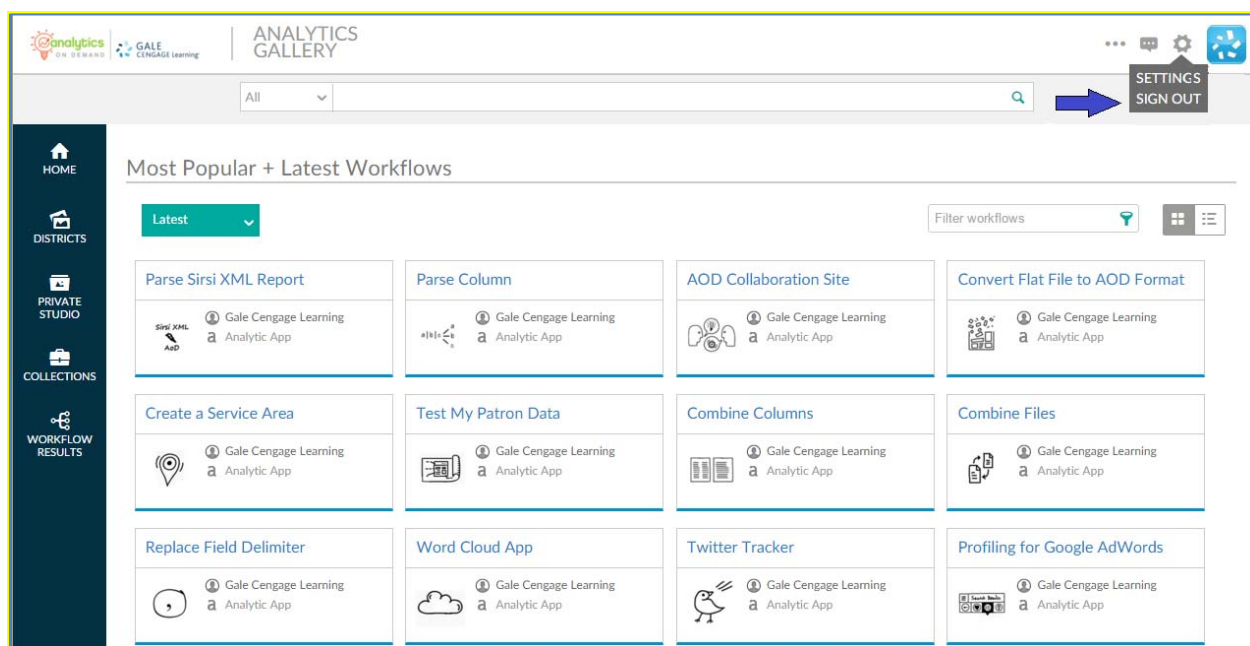
Move your cursor to the upper right corner of the screen above the **SIGN IN** icon. Type your username and password into the box that appears and click the icon to enter AOD.


The screenshot shows two forms side-by-side. The 'Sign In' form on the left has a text input field containing 'Cengage.Alteryx@cengage.com', a password input field with masked characters, a 'Forgot your password?' link, and 'SIGN IN' and 'CANCEL' buttons. The 'Sign Up' form on the right has 'First Name' and 'Last Name' input fields, a text input field containing 'Cengage.Alteryx@cengage.com', a password input field with masked characters, and 'SIGN UP' and 'CANCEL' buttons. The top of the form area features the 'analytics ON DEMAND' and 'GALE CENGAGE Learning' logos.

Note: The logins provided with your subscription are email addresses that allow access to the private collections as well as any other workflows present in the public gallery.

Other staff members can create additional usernames that enable them to enter the public gallery, which is populated with complimentary workflows provided with your paid subscription.

Examples of these complimentary workflows are a Twitter Tracker and a Word Cloud workflow



To log off the system, simply move your cursor to the  icon on the upper right corner of the screen. A box with **Settings** and **Sign Out** options appears. Click **Sign Out**, and access to the system ends.

2.2 System Menu

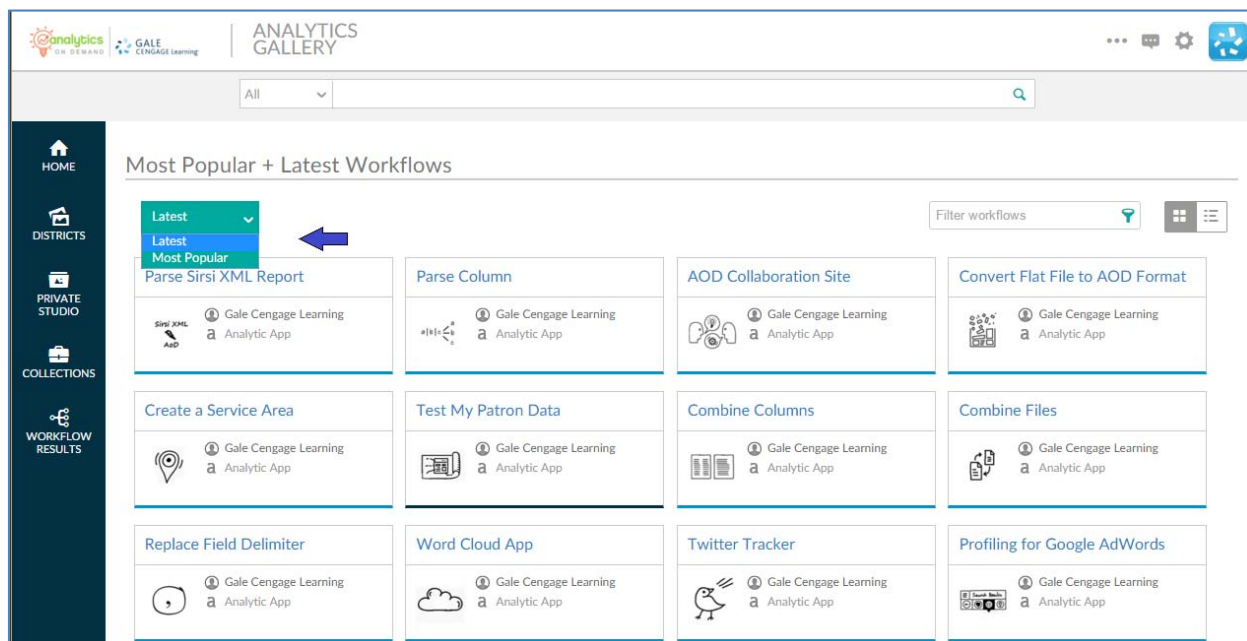
This section describes in general terms the system menu AOD users' first encounter, as well as the navigation paths to functions referenced on the screen.

2.2.1 Home Screen

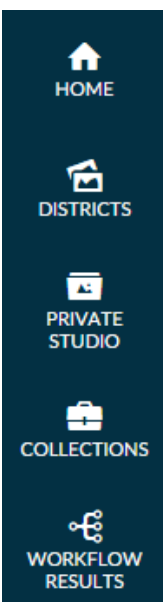
When you log into AOD, the following screen, which lists the complimentary workflows included with your subscription, appears.

Depending upon the number of complimentary workflows in the gallery, you may wish to click **Most Popular** to view the most popular workflows or **Latest** to see the most recent complimentary workflows that have been loaded.

Note: Staff members who created user IDs not authorized during the initial authentication setup can view and run any of the complimentary workflows in the gallery.



2.2.2 Private Studio & Collections



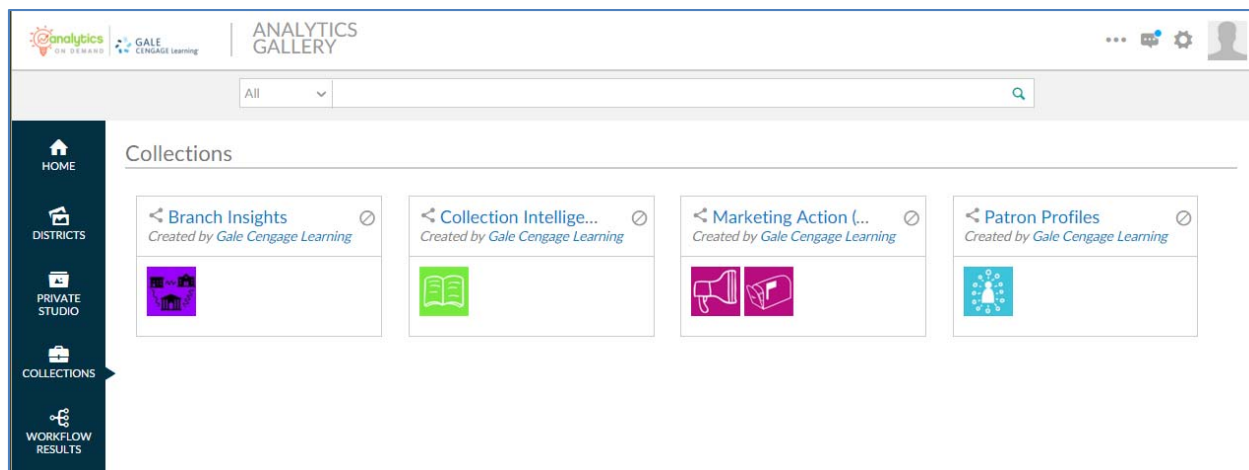
The AOD system menu appears on the left side of the screen. As noted in Section 2.2.1, logging into AOD places you at the HOME screen.

When you click **COLLECTIONS**, you can view the workflows your library currently subscribes to. To access a workflow, click the collection name or icon under the Collections header in the center of the screen. The workflow will open on its general description page.

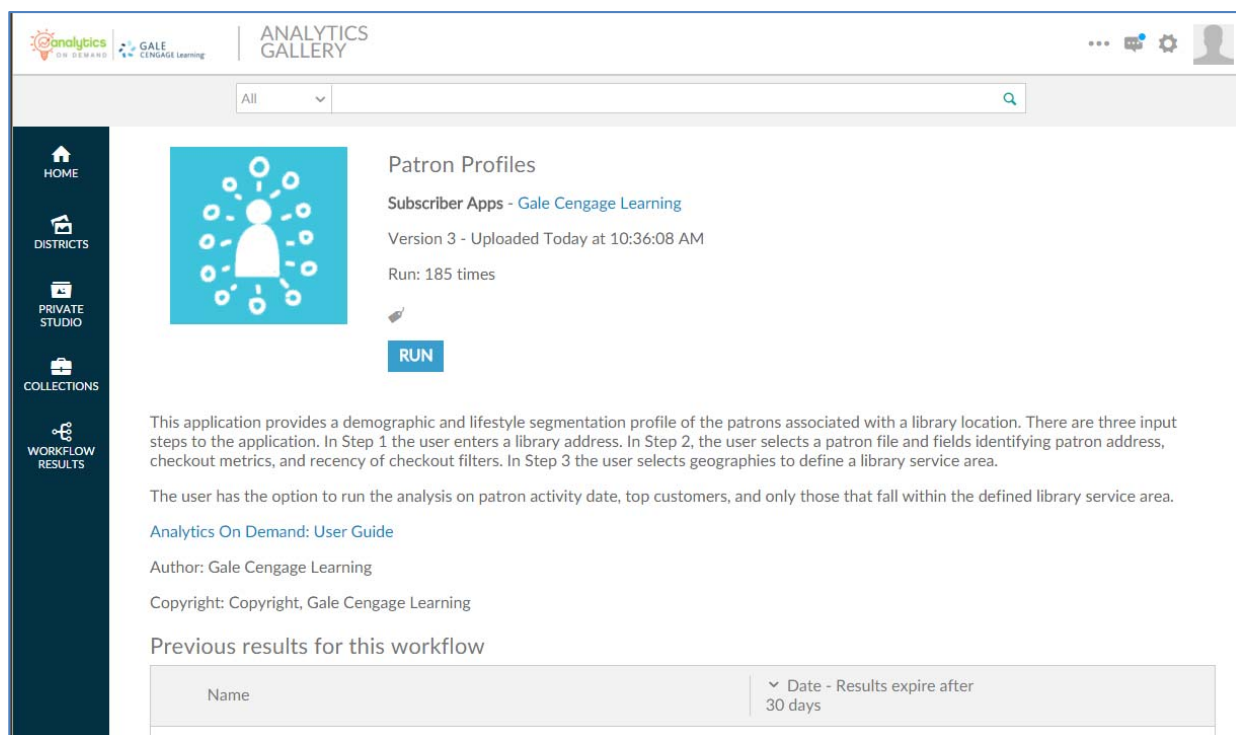
Note: There are several other AOD sections, and two contain workflows. The first, **PRIVATE STUDIO**, is not open to libraries.

The second, **DISTRICTS**, categorizes workflows into different categories such as **UTILITY** for workflows that perform some kind of utility function (i.e. combining files) and **COLLABORATION** for access to the AoD Collaboration site.

See the following screenshot for a view of the Collections formatting in AOD.



As indicated earlier, clicking a specific workflow in a collection opens it on its general description page, which is shown in the following screenshot.



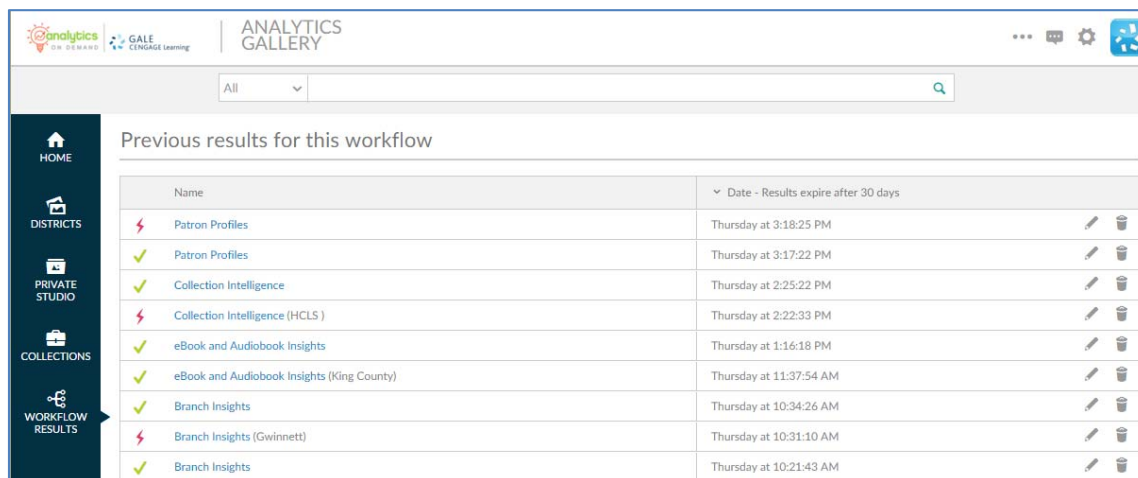
The general description page:

- Provides the name of the workflow
- Indicates the last time the workflow was updated, including its version number
- Shows how many times the workflow was run using your login
- Provides links to output (reports) from previous runs, assuming you have not deleted them
- Provides a link to the AOD User Guide

The first three bulleted items are self-explanatory. The fourth refers to HTML-formatted output, or reports produced by previous executions of a workflow and stored in the cloud. These reports are stored in the cloud, but the files used to create them were deleted after the workflows were run. These reports remain in the cloud until you delete them by clicking the trash can (🗑️) icon.

Note: Results are only kept for a limited amount of time as noted on the Workflow Results screen. After that time period they will be automatically deleted. **Please make sure you are backing up any important reports you would like to keep to your local computer or network storage location.**

The following screen **Previous results for this workflow** displays a typical report and when it was run.




Name	Date - Results expire after 30 days		
⚡ Patron Profiles	Thursday at 3:18:25 PM	✎	🗑️
✓ Patron Profiles	Thursday at 3:17:22 PM	✎	🗑️
✓ Collection Intelligence	Thursday at 2:25:22 PM	✎	🗑️
⚡ Collection Intelligence (HCLS)	Thursday at 2:22:33 PM	✎	🗑️
✓ eBook and Audiobook Insights	Thursday at 1:16:18 PM	✎	🗑️
✓ eBook and Audiobook Insights (King County)	Thursday at 11:37:54 AM	✎	🗑️
✓ Branch Insights	Thursday at 10:34:26 AM	✎	🗑️
⚡ Branch Insights (Gwinnett)	Thursday at 10:31:10 AM	✎	🗑️
✓ Branch Insights	Thursday at 10:21:43 AM	✎	🗑️

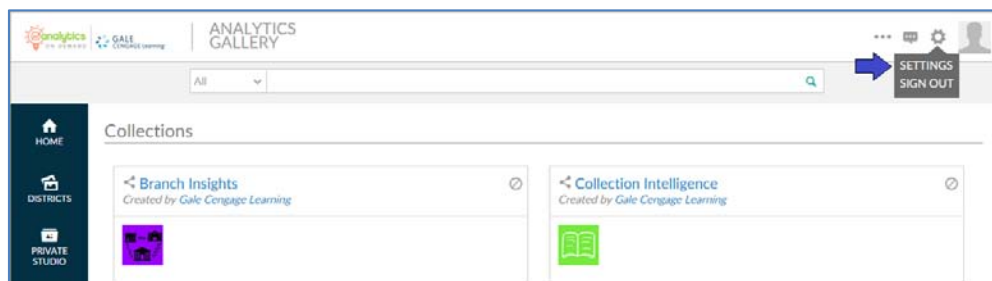
The screen **Previous results for this workflow** displays a running list of all the reports you have run and not deleted.

Note: You may delete any or all of these reports. You may also click the **renaming icon** (✎) to rename them. This provides a second opportunity to uniquely name a report. Your first opportunity was when the workflow was initially run.

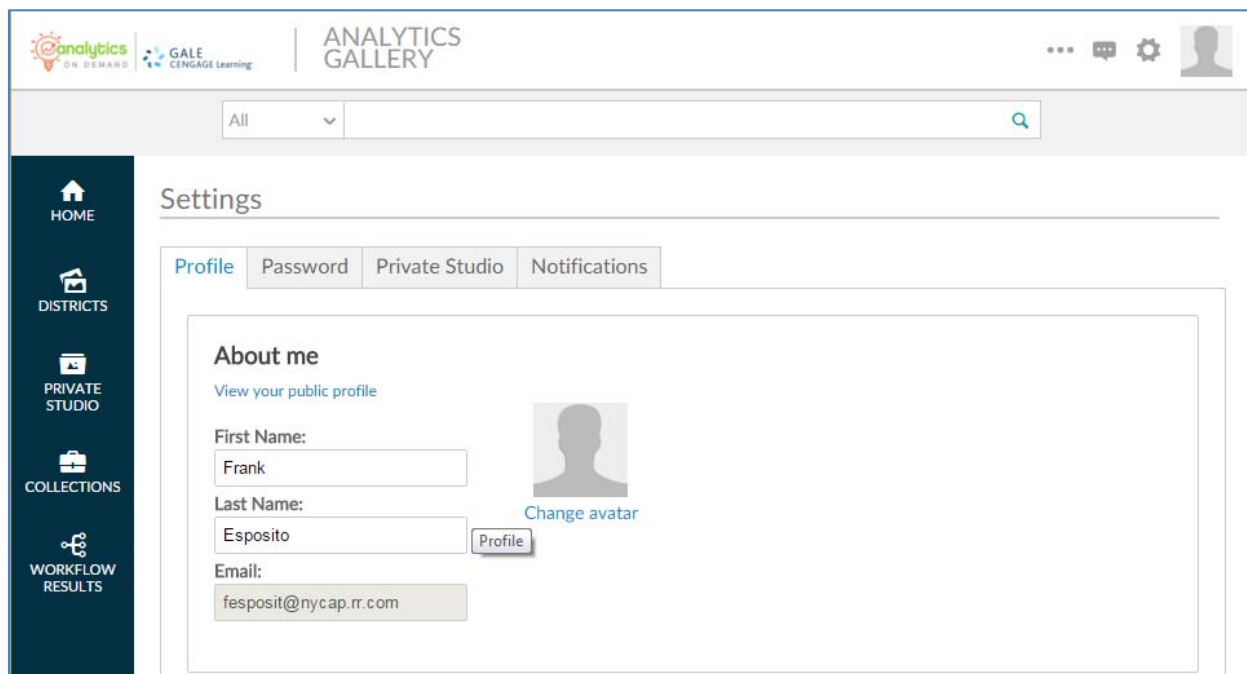
2.3 Changing Selected User ID Information and Password

This section describes how to change selected information related to your user ID, including your password.

To access and change this information, click on the  icon at the top of the screen and then select **Settings**.

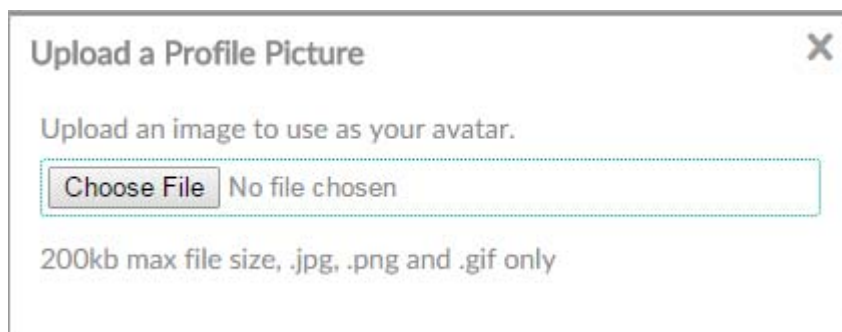


The following screen displays multiple tabs. Only **Profile** and **Password** are accessible to you. Click **Profile** to change general information that appears on screen views when you are logged in. This includes the ability to upload an image that is visible in the upper right corner at login.



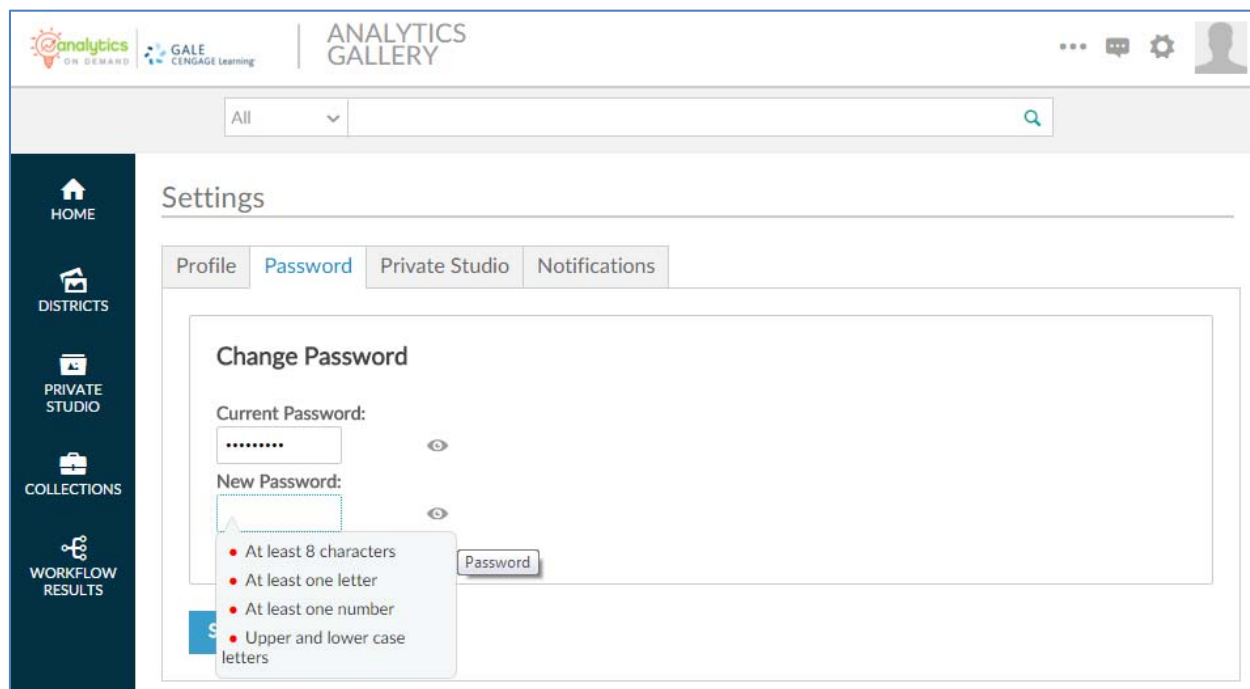
You can change this image by clicking on the **Change Avatar** link.

After you click it, a box that instructs you to browse your hard drive for a new image—similar to attaching a file to an email—appears.



Save any changes you make by clicking the **SAVE** icon. All changes will appear the next time you log into AOD.

To change your password click on the **Password** tab and enter your current password in the **Current Password** field. When you click on the **New Password** field you will be shown the requirements for the new password.



Enter your new password making sure it meets the requirements displayed and click on the **SAVE** icon to confirm your changes.

2.3 AOD Data Sources

This section covers current AOD data sources that you may blend with your library's data, depending on the specific AOD workflow used.

2.3.1 Demographics Segmentation Syndicated Survey Data

Experian Estimates & Projections (CAPE)

- Demographic data, consumer expenditure, retail demand, daytime population

Experian Mosaic

- Residential clustering definition and classifications

The Experian data install includes the following datasets and, with Mosaic and Mosaic Workplace, is referred to as CAPE:

- Current YR and 5YR Demographic Estimates and Projections
- US Census (2010)
- Current YR and 5YR Consumer Expenditure and Retail Demand
- 2012 American Community Survey (ACS)
- 2013 Mosaic and Mosaic Workplace (BG Dominant and Distributions)
- 2013 Simmons Syndicated Survey

2.3.2 Demographics Household Data

Experian ConsumerView SM

- Household demographic data

Experian's data warehouse of consumer demographics and self-reported life event, direct response, property, and mortgage information is the largest and most comprehensive resource for both list services and data enhancement available today — including data on more than 235 million consumers and 113 million households in the U.S.

Released quarterly, household fields include Mosaic Household and ZIP4, mail order buyer preferences, mortgage/home purchase, median family income, estimated income, dwelling type, and presence of children under 18. At the individual level, it includes marital status, gender, education, and occupation group.

2.3.3 Spatial Data

TomTom

- Address Points, Streetware, Geocoder, ZIP+4 Coder, CASS and Drivetime engine

Alteryx

- Maps

These products provide a visual display or add spatial dimension to files through address cleansing, geocoding, and drive time creation.

- Address Points includes more than 80 million parcel centroids. A parcel is the property boundary of an address; most of the points in the database are the centroid of the property boundary. However some of the points are edited by TomTom to rooftop accuracy and can enhance geocoding results.
- Alteryx Maps enhances mapping with atlas-like reference layers.
- Geocoder adds a spatial object (latitude/longitude) to addresses for visualization and data retrieval processes.
- ZIP+4 Coder adds spatial objects at multiple levels: ZIP Code, ZIP +2 and ZIP +4.
- CASS offers address clean-up and standardization for better data matching processes and geocoding.
- Guzzler creates drive-time polygons or measurements between points based upon distance or speed for visualization and reporting.

2.3.3 2015 Data Update Schedule

	Q1	Q2	Q3	Q4
TomTom Geocoding Data	x	x	x	x
TomTom Mapping Data	x		x	
Drivetime Engine	x		x	
Experian CAPE Demographics	x		x	
Mosaic Segmentation	x			

Simmons Behavioral Data			x	
Experian HH File	x	x	x	x
Spatial/Data Designer Update	Week of Aug 10	Week of Oct 5	Week of Dec 14	Week of Mar 7
Gallery Update	Week of Aug 24	Week of Oct 19	Week of Jan 4	Week of Mar 21
CASS	Feb, Apr, Jun, Aug, Oct, Dec			

2.4 AOD Data Security

2.4.1 Cloud Storage/Security

- Amazon Web Services (AWS) is the cloud computing service [Platform as a Service (PaaS)] for the AOD/Alteryx Analytics Gallery.
- AWS has a number of certification and accreditations with respect to the security of its hardware and supporting services. (See <http://aws.amazon.com/security/>.)
- AOD stores the output data file in a compressed, proprietary schema in a NoSQL data warehouse, until the user deletes the output file.
- Even if an attacker could obtain a copy or portion of the output report stored in the data warehouse, they would lack the proprietary code to decrypt and use the data. In addition, the output report lacks detailed information on any specific library patron.

2.4.2 Data Transfer

- When an AOD workflow is run, the file created is not permanently stored but rather used during run time and deleted immediately afterward. The communication “channel” used to deliver a file to a workflow is an encrypted channel.
- The only output from running a workflow is a report that is saved until a user deletes it.
- All files and report outputs can only be viewed by a user who has logged into AOD to execute a workflow.

2.4.3 Analytics Gallery

- While any data is stored in a shared NoSQL data warehouse, security firewalls and multiple permission levels prevent access to the AOD workflows or their data to anyone other than a specific library user who has been authorized to use them.
- Neither Gale nor Alteryx gallery administrators have access to content/data used to generate a report by a specific customer. Permission must be explicitly granted to a Gale/Alteryx administrator or delivered to a Gale/Alteryx representative via some other electronic means such as FTP or email.
- The AOD site was reviewed and security penetration tests were performed by a third-party vendor.

2.4.4 Execution/Runtime

- AOD workflows and associated data are secure even when being transferred among the horizontal array of execution servers in AWS.
- All communication is compressed and encrypted among all servers in the array to prevent “man-in-the-middle” attacks.
- Execution is a transient operation and no residual data (temporary or otherwise) is persisted in any location other than the secure data warehouse.

2.5 AOD Data Formats

2.5.1 Date Formats

AOD uses date fields in multiple workflows. The format of these date fields are consistent with how Microsoft products auto-configure date fields. The AOD software is using the Microsoft driver to convert the file upon upload. Month should always come before day, with one exception. But for #9 they all follow a similar pattern.

1. MM/DD/YYYY
2. MM-DD-YYYY
3. MM/DD/YY
4. MM-DD-YY
5. M/D/YYYY
6. M-D-YYYY
7. M/D/YY
8. M-D-YY
9. YYYY-MM-DD

Another important issue is to ensure the date field you are uploading only has one format in it. Sometimes when a user opens a file in excel, they can accidentally manipulate the format without knowing.

2.5.2 Address Formats

AOD uses addresses in many of the workflows. The input file can use either an address in one column or separate columns (a separate column for the address line, a separate column for the city, the state, the zip code). When using a single column for an address, AOD only recognizes a ‘\$’ delimiter between the street address and the city. No other delimiter is required.

2.5.3 Workflow Input file Formats

AOD requires that data input files be in specific formats. In effect, AOD is ILS agnostic but does require a certain format be used. Following are the requirements and examples of file formats for each of the existing workflows.

Patron Profiles & Marketing Action (one file)

Excel file that includes the following *three* pieces of data (in any order) – columns must have header names (the specific names are not important, as long as the columns have names):

- Patron address

- the patron address can either be in separate columns as follows:

Address	City	State	ZIP Code
34505 Bunker Hill Dr	FARMINGTON HILLS	MI	48331
35230 13 MILE RD	FARMINGTON HILLS	MI	48331
29505 ANDOVER BLVD	FARMINGTON HILLS	MI	48331
28641 AUBURN CT	FARMINGTON HILLS	MI	48331

- or in one column (if in one column, note the position of the '\$' delimiter), as follows

Address
34505 BUNKER HILL DR\$FARMINGTON HILLS MI 48331
35230 13 MILE RD\$FARMINGTON HILLS MI 48331
29505 ANDOVER BLVD\$FARMINGTON HILLS MI 48331
28641 AUBURN CT\$FARMINGTON HILLS MI 48331

- Checkouts (you may select the time period; e.g. could be in total, last year, last two years, etc)
- Last active date (the date the last time a patron checked something out)
- It is also beneficial to include one *additional* optional field, the patron barcode, as other workflows (Collection Intelligence & eBooks & audioBooks Insights) will also be using this file

As an example, the full file would look as follows (if the address was in one column):

Address	Last Active Date	Total Checkouts	Barcode (optional)
34505 BUNKER HILL DR\$FARMINGTON HILLS MI 48331	7/7/2000	48	2758893
35230 13 MILE RD\$FARMINGTON HILLS MI 48331	7/7/2000	1	2782499
29505 ANDOVER BLVD\$FARMINGTON HILLS MI 48331	7/7/2000	3	2286129
28641 AUBURN CT\$FARMINGTON HILLS MI 48331	7/7/2000	14	1815185

Collection Intelligence (two files)

Data Input File #1 – excel file that includes the following *three* pieces of data (in any order) - columns must have header names (the specific names are not important, as long as the columns have names):

1. Shelf Location code (this normally includes a location code but your library may not use a location code so that is optional; this column represents where a librarian would ‘reshef’ the item)
2. Format: e.g. book, CD, Audio, etc
3. Patron address (if in one column, delimiters are necessary)

As an example, a file would look as follows (with the address in one column):

Format	Shelf Location	Address
11	shjdv	34505 BUNKER HILL DR\$FARMINGTON HILLS MI 48331
7	maadv	35230 13 MILE RD\$FARMINGTON HILLS MI 48331

8	maadv	29505 ANDOVER BLVD\$FARMINGTON HILLS MI 48331
8	koadv	28641 AUBURN CT\$FARMINGTON HILLS MI 48331

Definitions Setup File #2 (OPTIONAL – without this file only the codes will show in the report output) – excel file that includes the following columns (in any order) - columns must have header names (specific names are not important, as long as the columns have names):

1. Format code
2. Format code descriptive text (e.g. book, CD, DVD, etc)
3. Subject/genre code (included in the shelf location code)
4. Subject/genre descriptive text
5. Location code (as indicated above, this is optional)
6. Location code descriptive text (as indicated above, this is optional)

A sample file would look like the following:

Format Code	Format Description	Subject code	Subject description	Location code	Location Description
1	Adult Book	xxx	Ignore	9x	Other libraries
2	Unused	abr	Blu-ray	ad	Administration
3	Unused	acm	Cassette-Music	cc	Farmington
4	Music CD	acs	Cassette-Spoken	cw	Bloomfield - East

eBook and Audiobook Insights (OD) (two files)

Data Input File #1 (Patron information) - excel file that includes the following *two* pieces of data (in any order) - columns must have header names (the specific names are not important, as long as the columns have names):

1. Unique library patron identifier code (could be a bar code or a unique Overdrive code; this code must be identical in both files)
2. Patron address (if in one field, delimiters are necessary)

As an example, a file would look as follows (with the address in one column):

Address	Barcode
34505 BUNKER HILL DR\$FARMINGTON HILLS MI 48331	2758893
35230 13 MILE RD\$FARMINGTON HILLS MI 48331	2782499
29505 ANDOVER BLVD\$FARMINGTON HILLS MI 48331	2286129
28641 AUBURN CT\$FARMINGTON HILLS MI 48331	1815185

If your library has BOTH Patron Profiles and eBook and Audiobook Insights, the extraction should look as follows with *three* pieces of data (so it could be used for both workflows):

Address	Barcode	Circ Active	TOT CHKOUT
34505 BUNKER HILL DR\$FARMINGTON HILLS MI 48331	2758893	7/7/2000	48
35230 13 MILE RD\$FARMINGTON HILLS MI 48331	2782499	7/7/2000	1

29505 ANDOVER BLVD\$FARMINGTON HILLS MI 48331	2286129	7/7/2000	3
28641 AUBURN CT\$FARMINGTON HILLS MI 48331	1815185	7/7/2000	14

Data Input File #2 (Overdrive information) - excel file that includes the following *three* pieces of data (in any order) columns must have header names (the specific names are not important, as long as the columns have names):

1. Format (eBook, audioBook, etc)
2. Subject field
3. Unique library patron identifier code (could be a bar code or a unique Overdrive code; this code must be identical in both files in order match for address locations)

As an example, a file would look as follows:

Format	Subjects	Barcode
eBook	Fiction, Mystery, Non-English Fiction	2758893
Audiobook	Fiction, Mystery	1064524
eBook	Home Design & Décor, Nonfiction	2758153
eBook	Nonfiction, Self Help, Sports & Recreations	1954906

Marketing Action (both Patron & Non-Patron) (one file)

Excel file that includes the following *one* piece of data – column must have a header name (the specific name is not important, as long as the column has a name):

1. Patron address
 - o the patron address can either be in separate columns as follows:

Address	City	State	ZIP Code
34505 Bunker Hill Dr	FARMINGTON HILLS	MI	48331
35230 13 MILE RD	FARMINGTON HILLS	MI	48331
29505 ANDOVER BLVD	FARMINGTON HILLS	MI	48331
28641 AUBURN CT	FARMINGTON HILLS	MI	48331

- o or in one column (if in one column, note the position of the '\$' delimiter), as follows

Address
34505 BUNKER HILL DR\$FARMINGTON HILLS MI 48331
35230 13 MILE RD\$FARMINGTON HILLS MI 48331
29505 ANDOVER BLVD\$FARMINGTON HILLS MI 48331
28641 AUBURN CT\$FARMINGTON HILLS MI 48331

3.0 PATRON PROFILES

3.0 PATRON PROFILES

This section provides a detailed description of the Patron Profiles workflow.

3.1 Patron Profiles

This workflow explains who a public library's patrons are—and aren't—so that a library can make data-driven decisions and drive meaningful outcomes for itself and the community it serves.

Patron Profile reports include:

- **Methodology** – Uses Mosaic lifestyle customer/market segmentation on a household basis with more than 71 types and 19 groupings.
- **Demographic Overview** – Includes an analysis of the library community's demographic data from the 2010 Census, a current view, and a 5-year forecast of key variables.
- **Patron Analysis Demographics** – Shows library activity based on location, household composition, dwelling type, and other variables.

3.1.1 Patron Profiles – Initial Screen

The following screen appears when you click the *Patron Profiles* workflow:

The screenshot displays the 'Analytics Gallery' interface. The main content area features a card for the 'Patron Profiles' workflow. The card includes a blue icon with a person silhouette and a gear, the title 'Patron Profiles', and the following details: 'Subscriber Apps - Gale Cengage Learning', 'Latest: Version 3 - Uploaded Yesterday at 10:36:08 AM', 'Published: Version 3 - Uploaded Yesterday at 10:36:08 AM', and 'Run: 188 times'. A blue 'RUN' button is positioned below the card. Below the card, there is a descriptive paragraph: 'This application provides a demographic and lifestyle segmentation profile of the patrons associated with a library location. There are three input steps to the application. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3 the user selects geographies to define a library service area. The user has the option to run the analysis on patron activity date, top customers, and only those that fall within the defined library service area.' Below this is a link for 'Analytics On Demand: User Guide', the author 'Gale Cengage Learning', and the copyright 'Copyright, Gale Cengage Learning'. At the bottom, a section titled 'Previous results for this workflow' contains a table with one entry:

Name	Date - Results expire after 30 days
✓ Patron Profiles	Today at 1:04:25 PM

This screen provides key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of the workflow** – “This workflow provides a demographic and lifestyle segmentation profile of the patrons associated with a library location. There are three input steps to the workflow. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3 the user selects geographies to define a library service area. The user has the option to run the analysis on patron activity date, top customers, and only those that fall within the defined library trade area.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide.
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

3.1.2 Patron Profiles – Description

When you click **RUN**, the following screen appears. Note that the screen displays six tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of commands.

The screenshot shows the 'ANALYTICS GALLERY' interface. At the top, there are logos for 'analytics ON DEMAND' and 'GALE CENGAGE Learning'. The main header reads 'ANALYTICS GALLERY'. Below the header is a search bar and a dropdown menu set to 'All'. The main content area is titled 'Patron Profiles' and includes an 'Optional Job Name' text box and a blue 'RUN' button. Below this, there are five tabs: 'Description', '1) Library Information', '2) Patron File', '3) Geographic Service Area', and '5) Optional Outputs'. The 'Description' tab is active, showing the following text:

Description
The Patron Profiles report will allow you to analyze your patrons in several different ways – by geography, by last active date, by frequency of checkouts:
BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the PATRON FILE tab.

1) LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.

2) PATRON FILE:
- Upload a patron file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron address, total number of checkouts, and the date they were last active.
- Select the active date of the patron group you want to analyze. You can elect to analyze all of your patrons or only those that have been active within a specific time frame (6 months, 12 months, 18 months, etc.).
- You may elect to analyze only your 'top customers' by selecting a percentage of patrons to analyze. This option will only analyze the customers that have borrowed the most materials in the time period specified.

3) GEOGRAPHIC SERVICE AREA:
- You will be asked to select a geography from a list of geographies. You may also select a custom geography created by DemographicsNow or any other accepted spatial

At the bottom of the screen, there is a 'LOOKING FOR MORE?' link and a text box containing the text 'Why of your library's service area. You may also select a custom geography created by DemographicsNow or any other accepted spatial'.

This tab allows you to name an output report in the text box located at the upper left side of the screen:

Patron Profiles

By using unique names, you can easily identify reports from previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

3.1.3 Patron Profiles – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for four purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library
- To choose whether or not to display the library location on any maps views when it is outside of the selected Service Area

The screenshot displays the 'Patron Profiles' web application interface. At the top, there is a search bar with 'All' and a magnifying glass icon. Below this is the main header 'Patron Profiles' with an input field for 'Optional Job Name' and a blue 'RUN' button. A horizontal tab bar contains five tabs: '1) Library Information' (selected), '2) Patron File', '3) Geographic Service Area', '4) Supplemental Patron Household Maps', and '5) Optional Outputs'. The 'Library Information' tab is active, showing a form titled 'Enter library information:'. The form includes the following fields: 'Library Name' (text input), 'Address' (text input), 'City' (text input), 'State' (dropdown menu with 'AL' selected), and '5-digit zip code' (text input). On the left side of the application, there is a dark blue sidebar with navigation icons and labels: 'HOME', 'DISTRICTS', 'PRIVATE STUDIO', 'COLLECTIONS', and 'WORKFLOW RESULTS'.

Click on the next tab or scroll down the page in your browser to continue.

3.1.4 Patron Profiles – Patron File

Use the **Patron File** tab to upload a data file—normally an Excel—file from your ILS. This file requires three specific pieces of information: patron address, total checkouts (optional), and a patron’s last active date.

You have flexibility in the type of data to include. For example, for total checkouts, your file could include total checkouts over the life of the library card or some subset filtered by ILS extraction. Perhaps the ILS extract includes only six months or a year of checkouts. Since the checkouts field is optional you may choose not to include it at all.

For last active date—if the ILS allows it—you may want to include only the last activity date for physical checkouts, the last activity date for computer use, or any other date tracked in in the ILS. This allows filtering not only by the *Patron Profiles* workflow (more on this to follow) but also on the ILS extract date you used to create the AOD input file.

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you select. (The single-column address view is the default.)

This screen shows the single-column address view.

Patron Profiles

Description 1) Library Information 2) Patron File 3) Geographic Service Area 4) Supplemental Patron Household Maps 5) Optional Outputs

2) Patron File

Select patron file and fields denoting checkout metrics:

Address information contained in one field

Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron name, address, total checkouts, and last active date fields.

Browse to your file:

AddressFull

Date

Checkouts (Optional)

Address information contained in multiple fields ...

Additional Filters:

Activity Date: ...

Checkout Ranking: ...

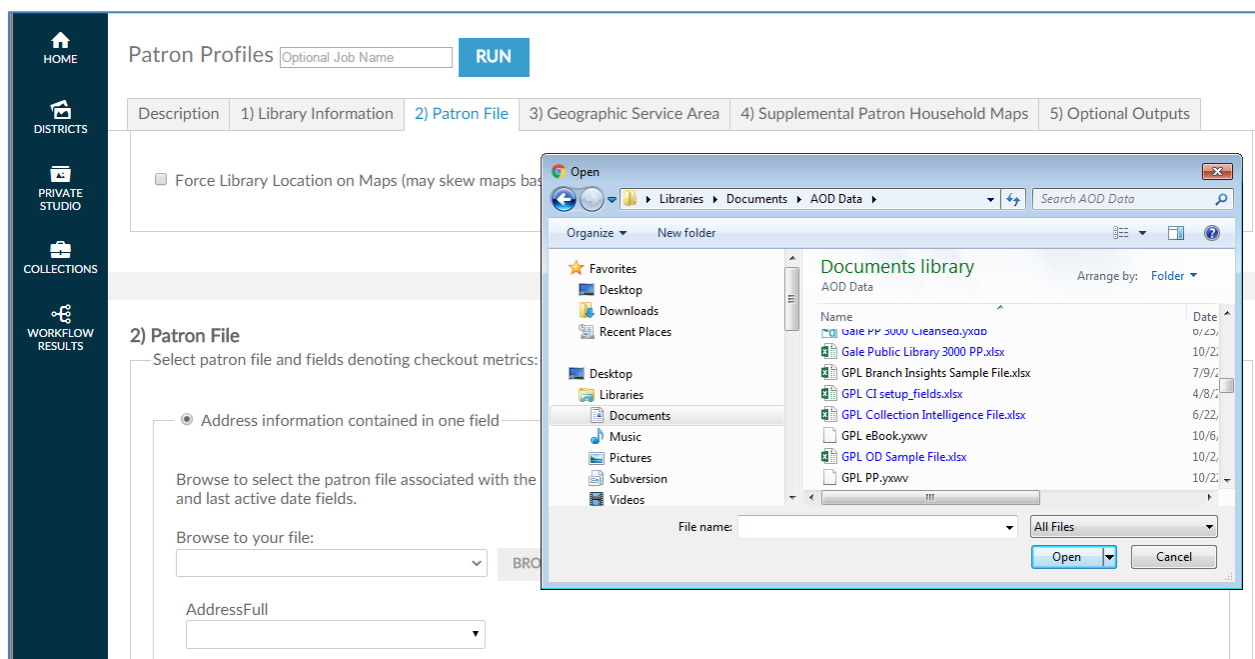
The following screen shows the multiple-column address view.

Once you select the address radio button, the next step is to click the **BROWSE** button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You **must** have already extracted your input file from your ILS before accessing the workflow.

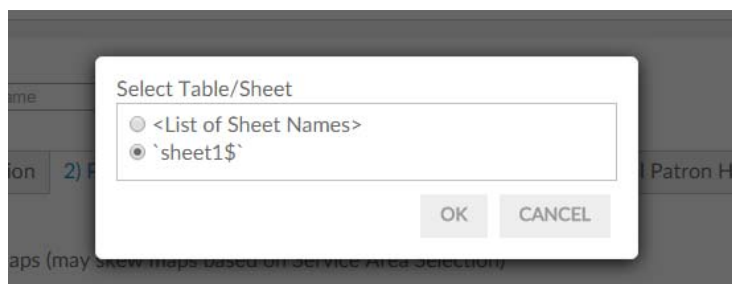
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



Once you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data. If not, click the drop-down list **Please select file and fields** to deselect the choice made and replace it with the correct choice. On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

Please select file and fields

Gale Public Library 3000 PP.xl...]'sheet1\$' Browse

TOTAL CHECKOUTS
Select a Field

ADDRESS
Address

- Select a Field
- Street Number
- Street Name
- Street Suffix
- City
- State
- ZIP Code
- Address
- Circ Active
- TOT CHKOUT
- Barcode

After you upload your patron file, scroll down the screen and you may choose two filters a) patron activity date, or b) percentage of top patrons

As noted, the first filter is **patron activity date**. Click the icon for a drop-down menu of choices. The default is the All Patrons.

Additional Filters: _____

Activity Date: _____

Click the drop down box to make a selection.

- All Patrons
- Active Last 6 Months
- Inactive Last 6 Months
- Active Last 12 Months
- Inactive Last 12 Months
- Active Last 18 Months
- Inactive Last 18 Months
- Active Last 24 Months
- Inactive Last 24 Months
- Active Last 30 Months
- Inactive Last 30 Months
- Active Last 36 Months
- Inactive Last 36 Months
- All Patrons

Prev

This means that all patrons, regardless of activity on their library card, are included in the **Patron Analysis**. To change this selection, select the option you prefer. Note that this filter is keyed to the date field in the **Patron File** tab.

Note: You can define the extract activity date column differently. That is, you can choose a date from cardholder inception or a period of time defined by the ILS extraction when creating the input file. The

most common choice is the last date of patron activity, with no filter applied when extracting the file from the ILS.

The next filter, **Checkout Ranking**, allows you to select a percentage of your heaviest (or least heavy) users, as measured by **Total Checkouts** column data in the user input file.

Checkout Ranking: _____
 Top
 % of Patrons:
 100
 *100 = All Patrons

By clicking the arrows to the right of the box, you can choose to analyze a percentage of your very best (or your low usage) “customers.” This could be the top five (5) percent of users, as measured by a highest-to-lowest ranking of checkouts. This selection is best used after first analyzing all patrons and then doing selective analysis on smaller groups of patrons. You may, for example, want to do a percentage ranking of usage by patrons from a smaller geography or by patrons who live outside the service area.

Click on the next tab or scroll down the page in your browser to continue.

3.1.5 Patron Profiles – Geographic Service Area

Your next step is to identify the geographic area you want to analyze. Examples of geographies include

- a) the library’s service area
- b) surrounding geographies outside the service area (to analyze patrons who use the library but don’t reside in the service area)
- c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods)

In order to select a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the + **sign** to expand the list and locate the geography you want. You may select a single geography by clicking the box next to it. (A check mark appears.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files.

If you are loading a spatial file, click the OR Upload your library's service area file (spatial formats only) button and then click on **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

After you select a geography, scroll down the screen and choose the final filter: whether to include or exclude patrons outside the geography selected.

Patron Profiles

Description	1) Library Information	2) Patron File	3) Geographic Service Area	4) Supplemental Patron Household Maps	5) Optional Outputs
<input type="checkbox"/> Census Tracts <input type="checkbox"/> Congressional Districts (114th) <input type="checkbox"/> Counties <input type="checkbox"/> DMA by State <input type="checkbox"/> Metro CBSAs by State <input type="checkbox"/> Places <input type="checkbox"/> States <input type="checkbox"/> ZIP Codes by County					

OR Upload your library's service area file (spatial formats only) ...

Location Filter:

Analyze all patrons, regardless of their location.

Analyze only those patrons that fall WITHIN your service area (defined above).

Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

Finally, the **location filter** looks at whether patrons live inside or outside the library service area. The default selection, **Analyze all patrons**, includes all patrons, regardless of where they live. Clicking **Analyze only those patrons that fall WITHIN your service area (defined above)** includes patrons only if their addresses lie within the service area geography you defined earlier. Clicking **Analyze only those patrons that fall OUTSIDE OF your service area (defined above)** includes patrons only if their addresses lie outside the service area geography you defined earlier.

Location Filter:

Analyze all patrons, regardless of their location.

Analyze only those patrons that fall WITHIN your service area (defined above).

Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

Click on the next tab or scroll down the page in your browser to continue.

3.1.6 Patron Profiles – Supplemental Patron Household Map

Your next step is to select any additional theme based maps you want to be produced based on your Patrons demographic data. Each of these reports will map your Patrons with color coded themes based on the demographic variable you have chosen. This is useful in getting a visual image of your service area and how the Patrons are distributed according to the variable you have chosen.

Note: Each additional map you select adds processing time to your report and increases the size of final report.

Patron Profiles

Description | 1) Library Information | 2) Patron File | 3) Geographic Service Area | 4) Supplemental Patron Household Maps | 5) Optional Outputs

4) Supplemental Patron Household Maps

Include additional themed Patron household maps based on the following demographic variables:

- Estimated Household Income
- Dwelling Unit Size
- Length of Residence
- Number of Adults in Living Unit
- Presence of Children
- Dwelling Type
- Household Composition

Select one or more supplemental maps by clicking the checkbox next to the report.

Click on the next tab or scroll down the page in your browser to continue.

3.1.7 Patron Profiles – Optional Outputs

The final step is to select any additional output you would like to see about the Patron data you have provided. We perform a thorough data cleansing and validation process at the beginning of each report and these options will help you identify where your data may need some additional work to produce better results.

Patron Profiles

Description | 1) Library Information | 2) Patron File | 3) Geographic Service Area | 4) Supplemental Patron Household Maps | 5) Optional Outputs

5) Optional Outputs

Check to include any of these optional outputs:

- Summary report of your patron data "health".
- Patron records with address or date issues.
- Patron records that failed to match to Experian households.

There are three optional outputs available.

- a) **Summary of your patron data “health”** – this will create a report outlining the number of records found in your patron file with the number of good/bad records found as well as the number of records found on Experian. It will also tell you the reasons for any bad data that was found.

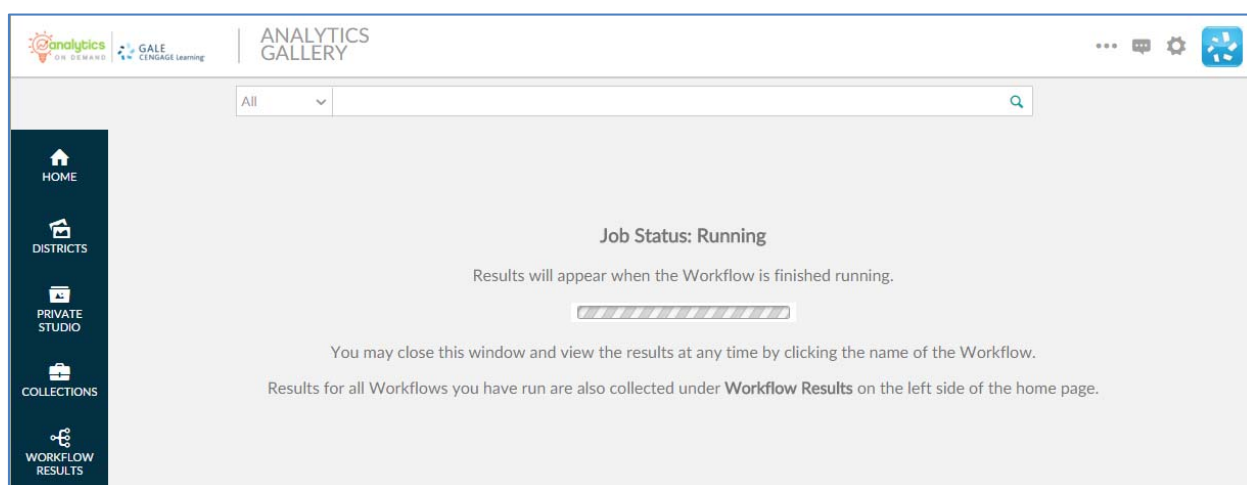
- b) **Patron records with address or date issues** – this will create a downloadable file of all patron address records that were bad and the reason why they could not be processed.
- c) **Patron records that failed to match to Experian households** – this will create a downloadable file of the patron addresses that could not be found on the Experian household file.

Note: There are several reasons for Experian not having a match for a specific household. Among other things a consumer needs to be active at an address for some amount of time before Experian can profile them. The household might be vacant or for sale. Excluding the Suite number in areas of high rise and multiple dwelling units lowers your match rate. And finally, the Experian data is updated quarterly so it may take time to work itself through the system.

Selecting the Optional Outputs is the final step in creating the Patron Profiles report.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the **COLLECTIONS** link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the **WORKFLOW RESULTS** link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

4.0 COLLECTION INTELLIGENCE

4.0 COLLECTION INTELLIGENCE

This section provides a detailed description of the *Collection Intelligence* workflow.

4.1 Collection Intelligence

This section provides a detailed description of the *Collection Intelligence* workflow. This workflow explains what a public library's patrons are—and aren't—borrowing, so your library can make data-driven decisions and deliver drive meaningful outcomes for itself and the community.

The **Material and Genre Analysis** in *Collection Intelligence* can be used to craft marketing messages, develop targeted marketing lists, stock appropriate library materials, and identify target areas for promotion.

The workflow begins with an analysis of material types and genres (subjects) that are borrowed by all library patrons and then breaks the genres down into different Mosaic lifestyle clusters. The workflow then provides insight into the Mosaic lifestyle clusters and the genres borrowed by library patrons. The analysis covers only the specific geographic area you select.

4.1.1 Collection Intelligence – Initial Screen

The following screen appears when you click the *Collection Intelligence* workflow:

The screenshot displays the Analytics Gallery interface. On the left is a dark sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area features a card for 'Collection Intelligence' with a green book icon. The card includes the following text:

- Subscriber Apps - Gale Cengage Learning**
- Latest: Version 2 - Uploaded 7 days ago**
- Published: Version 2 - Uploaded 7 days ago**
- Run: 57 times**

Below the card is a blue 'RUN' button. Underneath the button is a detailed description of the application's purpose and a five-step process:

- In Step 1 the user enters a library name and address.
- In Step 2 the user may enter a file with the definitions of the format, genre, and location codes.
- In Step 3 the user selects the data files to be analyzed.
- In Step 4 the user has the option to select specific geographies on which to run the analysis, or to run the analysis on all checkout data contained in the input file.
- In Step 5, the user can choose to include maps in the report.

Additional information includes a link to the 'Analytics On Demand: User Guide', the author 'Gale Cengage Learning', and the copyright 'Copyright, Gale Cengage Learning'.

At the bottom, a table titled 'Previous results for this workflow' shows one entry:

Name	Date - Results expire after 30 days
✓ Collection Intelligence	Thursday at 2:25:22 PM

This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of the workflow** – “This workflow provides breakdowns of library checkouts by format, genre, and location with correlation of format and genre checkouts among various patron demographic segments. There are four input steps to the application. In Step 1 the user enters a library name and address. In Step 2 the user may enter a file with the definitions of the format, genre, and location codes. In Step 3 the user selects the data files to be analyzed. In Step 4 the user has the option to select specific geographies on which to run the analysis, or to run the analysis for all checkout data contained in the input file.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

4.1.2 Collection Intelligence – Description

When you click **RUN**, the following screen appears. Note that the screen displays six tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands

The screenshot shows the 'Collection Intelligence' interface. At the top, there is a header with 'Collection Intelligence', an input field for 'Optional Job Name', and a blue 'RUN' button. Below the header is a tabbed interface with the following tabs: 'Description', '1) Library Information', '2) Collection File', '3) Definitions/Setup File (Optional)', '4) Geographic Service Area', and '5) Optional Outputs'. The 'Description' tab is active and contains the following text:

BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the COLLECTION FILE tab.

1) LIBRARY INFORMATION:

- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.

2) COLLECTION FILE:

- Upload a collection file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron address, format (item type), and the subject/genre.
- Verify these fields are selected once the file loads.

3) DEFINITIONS/SETUP FILE (OPTIONAL):

- Upload a setup file (optional) that identifies the alphanumeric codes for locations, format types and the subject/genre. Each of these will also require descriptive text to include in the reports. You will then need to specify the number of characters from the beginning of the code that indicate the location.
- If a setup file is not included, the final report will display the codes themselves rather than the definition.

4) GEOGRAPHIC SERVICE AREA:

- Select the geography of your library's service area. You may also select a custom geography created by DemographicsNow or any other accepted spatial format (YXDB, SHP, TAB, KML). You may also select from a list of pre-defined geographies. This can be by county, zip code, city, block group, census tracts or any other defined geography.
- Additionally, select the radio button that determines whether you only want to analyze patrons within the geographic area you specified, or all patrons regardless of the geographic area.

5) OPTIONAL OUTPUTS:

- Choose to output maps showing where patrons reside based on library behavior, a summary report of your data "health", data records that could not be processed, and records that could not be matched to Experian.

This tab allows you to name an output report in the text box located in the top left portion of the screen:

Collection Intelligence

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

4.1.3 Collection Intelligence – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library
- To choose whether or not to display the library location on any maps views when it is outside of the selected Service Area

Click on the next tab or scroll down the page in your browser to continue.

4.1.4 Collection Intelligence – Collection File

Your next step is to upload a data file—typically an Excel file—from your ILS. This file requires three pieces of information: a) borrowed item format, b) the subject/genre identifier, which is usually a high-level identifier that facilitates returning printed material to the shelf and c) the patron address.

You can choose the types of data to include in the file. For example, it can include any type of format identifier you want to analyze. Or any subject/genre identifier can be used if it exists in the ILS. This capability allows filtering not only by the *Collection Intelligence* workflow—more on this to follow—but also by the ILS extract used to create the AOD input file.

The following screenshot displays an input file that includes patron address in one column. Depending on your ILS, the patron address may be extracted and placed in multiple columns—one/two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.

The screenshot shows the 'Collection Intelligence' interface. At the top, there is a 'RUN' button and a field for 'Optional Job Name'. Below this is a navigation bar with five tabs: 'Description', '1) Library Information', '2) Collection File' (which is selected), '3) Definitions/Setup File (Optional)', '4) Geographic Service Area', and '5) Optional Outputs'. The main content area is titled '2) Collection File' and 'File Upload'. It contains a radio button selected for 'Select this button if the address is in a single field'. Below this, there is a section 'Please select file and fields' with a 'BROWSE' button. There are four dropdown menus: 'AddressFull', 'Format', 'SubjectGenre', and 'Location Code (Optional)'. At the bottom, there is a radio button for 'Select this button if the address is in multiple fields ...'.

This is the view you get when you select the option for address in multiple fields.

The next question you must answer is whether the input file uses a location identifier. These identifiers are normally used by a multi-branch library. They identify physical branch locations.

There are three options for Location Code.

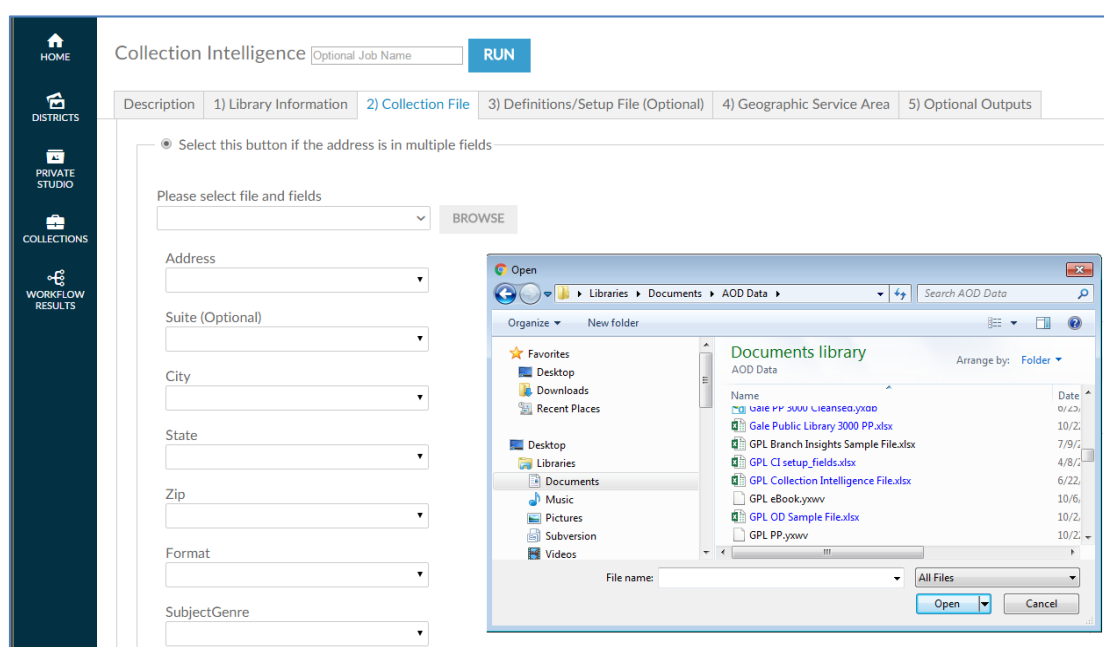
- a) **Do not use a Location Code** – If your library does not use a location identifier select this option.
- b) **Use Location Code from Collection File** – Choose this option if you have a Location Code available in your Collection file that is separate from the Subject/Genre Field. **Note:** if you use this option you must map the Location Code (Optional) field for your Collection file.
- c) **Location Code in Subject/Genre field** - If your library uses location identifiers as part of the Subject/Genre field the use this option. You will need to specify the number of characters at the beginning of the Subject/Genre field that identifies the location. The default length is two (2) characters.

After you have selected the address format for your input file, click the **BROWSE** button to browse input files on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the workflow.

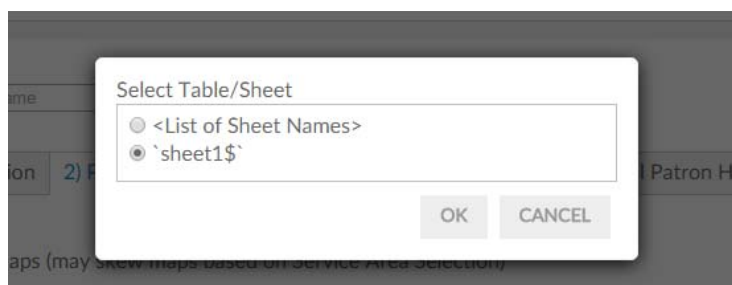
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is the correct one by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

Please select file and fields

GPL Collection Intelligence Fi...]'Item test\$" ▼

FORMAT
Format ▼

SUBJECT/GENRE
Select a Field ▼

- Select a Field
- Format - Mapped to FORMAT
- Shelf Location
- Street Number
- Street Name
- Street Address - Mapped to STREET ADDRESS
- Street Suffix
- City - Mapped to CITY
- State - Mapped to STATE
- ZIP Code - Mapped to ZIP
- Address

After aligning the necessary fields, click on the next tab or scroll down the page in your browser to continue.

4.1.5 Collection Intelligence – Definitions/Setup File (Optional)

The **Definitions/Setup File (Optional)** tab is where you define the textual descriptions of codes stored in your ILS (if you use them).

The default is **No**. A definitions file is an Excel spreadsheet that translates code (identified in one column) to textual description (identified in another column).

- [Click here if there is no definitions file \(Default\).](#)
- [Click here to use a definitions file. ...](#)

The definition file requires code and textual descriptors for format, subject/genre, and location (if used). If an ILS extract already uses a textual description of format, subject/genre, and location (if used), you usually do not use a definitions file. The following example shows a typical definition file:

Format Code	Format Description	Location code	Location Description	Genre code	Genre description
1	Adult Book	9x	Other libraries	xxx	Ignore
2	Unused	ad	Administration	abr	Blu-ray
3	Unused	cc	Farmington	acm	Cassette-Music
4	Music CD	cw	Bloomfield - East	acs	Cassette-Spoken
5	Unused	da	Bloomfield - West	adr	CD ROM
6	DO NOT USE-Video	il	Bloomfield - North	adv	DVD

If you choose to use a definitions file, click **Click here to use a definitions file...** The data input screen will expand, allowing you to browse files on your hard drive/network and chose one.

After you select a file, you will be asked to confirm the specific worksheet you have chosen. You will be required to match the correct column in each of the drop-down menus that aligns the spreadsheet to the format code and description and the genre code and description.

The **Location Code** and **Location Description** drop-down lists are optional and need only be matched/aligned with the file columns if you use location identifiers.

Click on the next tab or scroll down the page in your browser to continue.

4.1.6 Collection Intelligence – Geographic Service Area

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

The screenshot shows the 'Collection Intelligence' interface. On the left is a dark sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main area has a title 'Collection Intelligence' with an 'Optional Job Name' input field and a 'RUN' button. Below this is a tabbed interface with five tabs: 'Description', '1) Library Information', '2) Collection File', '3) Definitions/Setup File (Optional)', '4) Geographic Service Area', and '5) Optional Outputs'. The '4) Geographic Service Area' tab is active, displaying a list of geographies with checkboxes: Block Groups, CCDs/MCDs by County, Census Tracts, Congressional Districts (114th), Counties, DMA by State, Metro CBSAs by State, Places, States, and ZIP Codes by County. Below the list is a radio button option: 'OR upload your library's service area file (spatial formats only) ...'. At the bottom, there is a 'Location Filter:' section with three radio button options: 'Analyze all patrons, regardless of their location.', 'Analyze only those patrons that fall WITHIN your service area (defined above).', and 'Analyze only those patrons that fall OUTSIDE OF your service area (defined above)'.

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files.. If you are loading a spatial file, click the OR Upload your library's service area file (spatial formats only) button and then click on **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

After you select a geography, scroll down the screen and choose the final filter: whether to include or exclude patrons outside the geography selected.

Note: If you are interested in a county, do not select all its block groups. AOD calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

After you select a geography, scroll down the screen to the final filter: whether to include or exclude patrons outside the geography selected.

Finally, the **location filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Analyze only those patrons that fall WITHIN your service area (defined above)** includes patrons only if their addresses lie within the service area geography you defined earlier. Clicking **Analyze only those patrons that fall OUTSIDE**

OF your service area (defined above) includes patrons only if their addresses lie outside the service area geography you defined earlier.

Location Filter:

Analyze all patrons, regardless of their location.

Analyze only those patrons that fall WITHIN your service area (defined above).

Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

Click on the next tab or scroll down the page in your browser to continue.

4.1.7 Collection Intelligence Insights – Optional Outputs

The final step in the process before running the report is to decide whether you want to include maps and other optional reports/files in the output. The maps include visuals of the home locations, arranged by material type and genre, of patrons who have checked out materials.

The maps add a useful visual enhancement to the analysis of the charts and tables of the base report. With the maps, you can see at a glance which portion of your trade area tends to check out various genres and formats most often.

Collection Intelligence

Description 1) Library Information 2) Collection File 3) Definitions/Setup File (Optional) 4) Geographic Service Area 5) Optional Outputs

Note:

After execution, you will only see a preview of one output file by default. To view additional outputs you can toggle between output files using the drop down menu next to the text "Output File:" and just below the name of the app in the app result window. Sorry, no preview is available for the map output.

You may also see a list of all outputs from this app by clicking on the "bulleted list" button in the top right corner of the app results window.

Include as Additional Output:

Maps of patron borrowers (may increase processing time).

Summary report of your patron data "health".

Patron records with address or date issues.

Patron records that failed to match to Experian households.

There are four optional outputs available.

- a) **Maps of patron borrowers** - These maps include visuals of the home locations, arranged by material type and genre, of patrons who have checked out materials. The maps add a useful visual enhancement to the analysis of the charts and tables of the base report. With the maps, you can see at a glance which portion of your trade area tends to check out various genres and formats most often. **Note:** Selecting the additional maps adds processing time to your report and increases the size of final report.
- b) **Summary of your patron data "health"** – this will create a report outlining the number of records found in your patron file with the number of good/bad records found as well as the

number of records found on Experian. It will also tell you the reasons for any bad data that was found.

- c) **Patron records with address or date issues** – this will create a downloadable file of all patron address records that were bad and the reason why they could not be processed.
- d) **Patron records that failed to match to Experian households** – this will create a downloadable file of the patron addresses that could not be found on the Experian household file.

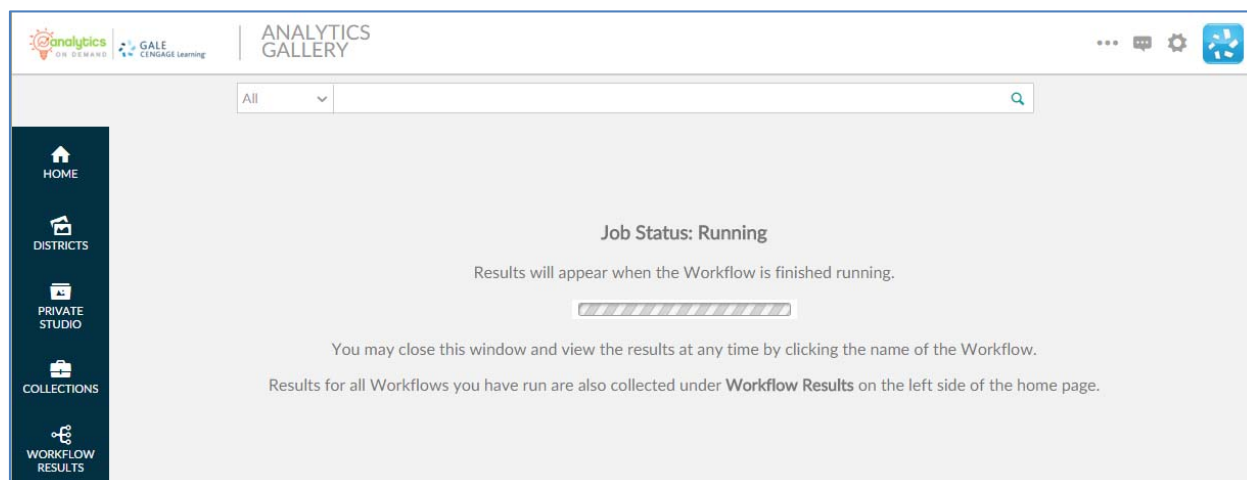
Note: There are several reasons for Experian not having a match for a specific household. Among other things a consumer needs to be active at an address for some amount of time before Experian can profile them. The household might be vacant or for sale. Excluding the Suite number in areas of high rise and multiple dwelling units lowers your match rate. And finally, the Experian data is updated quarterly so it may take time to work itself through the system.

Simply click the box to include the options you want or leave it blank if you elect not to.

Selecting maps is the final step in this process.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the **COLLECTIONS** link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the **WORKFLOW RESULTS** link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

5.0 EBOOK AND AUDIOBOOK INSIGHTS

5.0 EBOOK AND AUDIOBOOK INSIGHTS

This section provides a detailed description of the *eBook & audiobooks Insights* workflow. This workflow is designed to work with input files from multiple electronic eBook vendors, providing the data input format follows the workflow required input.

5.1 eBook & AudioBook Insights

This section provides a detailed description of the *eBook & audiobook Insights* workflow. This workflow explains the electronic materials a public library's customers are—and aren't—borrowing on the eBook platform. It enables a public library to make data-driven decisions and drive meaningful outcomes for itself and the community it serves.

You can use *eBook & audiobook Insights* reports to craft marketing messages, develop targeted marketing lists, configure appropriate eBook content material, and identify target areas for promotion.

The workflow begins with an analysis of the genres that are borrowed by library patrons within the eBook platform in total and then breaks the genres down into different Mosaic lifestyle clusters. The breakouts provide insight into which genres your high-use patrons are borrowing most frequently.

5.1.1 eBook & AudioBook Insights – Initial Screen

The following screen appears when you click the *eBook & Audiobook Insights* workflow:


The screenshot displays the 'Analytics Gallery' interface. On the left is a dark sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area shows a workflow card for 'eBook and Audiobook Insights' by Gale Cengage Learning. The card includes a red icon of headphones, the title, author, latest version (Version 2), published date (7 days ago), and run count (66 times). Below the card are buttons for 'RUN', 'DOWNLOAD', and a 'Sharing' dropdown menu. A detailed description of the workflow follows, explaining that it provides breakdowns of library checkouts by format, genre, and location, with five input steps. A 'User Guide' link is provided. At the bottom, a table lists previous results for this workflow.

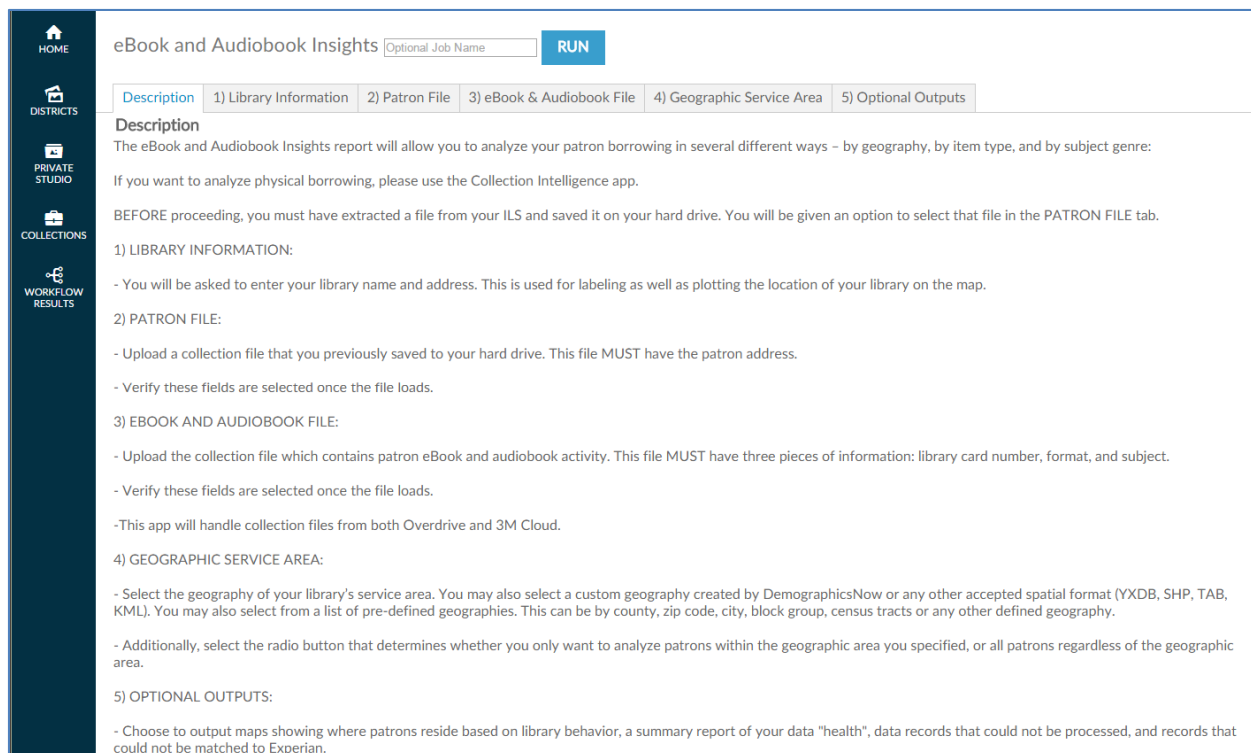
Name	Date - Results expire after 30 days
✓ eBook and Audiobook Insights	Thursday at 1:16:18 PM

This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of what the eBook and AudioBook Insights workflow does:** “This workflow provides breakdowns of library checkouts by format, genre, and location with correlation of format and genre checkouts among various patron demographic segments. There are five input steps to the workflow.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide.
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

5.1.2 eBook & AudioBook Insights– Description

When you click , the following screen appears. Note that the screen displays six tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands.



eBook and Audiobook Insights **RUN**

Description | 1) Library Information | 2) Patron File | 3) eBook & Audiobook File | 4) Geographic Service Area | 5) Optional Outputs

Description
The eBook and Audiobook Insights report will allow you to analyze your patron borrowing in several different ways – by geography, by item type, and by subject genre:
If you want to analyze physical borrowing, please use the Collection Intelligence app.
BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the PATRON FILE tab.

1) LIBRARY INFORMATION:

- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.

2) PATRON FILE:

- Upload a collection file that you previously saved to your hard drive. This file **MUST** have the patron address.
- Verify these fields are selected once the file loads.

3) EBOOK AND AUDIOBOOK FILE:

- Upload the collection file which contains patron eBook and audiobook activity. This file **MUST** have three pieces of information: library card number, format, and subject.
- Verify these fields are selected once the file loads.
- This app will handle collection files from both Overdrive and 3M Cloud.

4) GEOGRAPHIC SERVICE AREA:

- Select the geography of your library's service area. You may also select a custom geography created by DemographicsNow or any other accepted spatial format (YXDB, SHP, TAB, KML). You may also select from a list of pre-defined geographies. This can be by county, zip code, city, block group, census tracts or any other defined geography.
- Additionally, select the radio button that determines whether you only want to analyze patrons within the geographic area you specified, or all patrons regardless of the geographic area.

5) OPTIONAL OUTPUTS:

- Choose to output maps showing where patrons reside based on library behavior, a summary report of your data "health", data records that could not be processed, and records that could not be matched to Experian.

This tab allows you to name an output report in the text box located in the upper left portion of the screen:

eBook and Audiobook Insights

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

5.1.3 eBook & AudioBook Insights – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from their home to the library
- To choose whether or not to display the library location on any maps views when it is outside of the selected Service Area

The screenshot displays the 'eBook and Audiobook Insights' application interface. At the top, there is a header with the title 'eBook and Audiobook Insights' and an input field for 'Optional Job Name' followed by a 'RUN' button. Below the header is a navigation bar with five tabs: 'Description', '1) Library Information' (which is active), '2) Patron File', '3) eBook & Audiobook File', '4) Geographic Service Area', and '5) Optional Outputs'. The main content area is titled '1) Library Information' and contains several input fields: 'Library Name', 'Address', 'City', 'State' (a dropdown menu currently showing 'AL'), '5-digit ZIP code', and 'Optional Report Title'. At the bottom of this section is a 'Map Options' section with a checkbox labeled 'Force Library Location on Maps (may skew map based on Service Area Selection)'. On the left side of the interface is a dark blue sidebar with icons and labels for 'HOME', 'DISTRICTS', 'PRIVATE STUDIO', 'COLLECTIONS', and 'WORKFLOW RESULTS'.

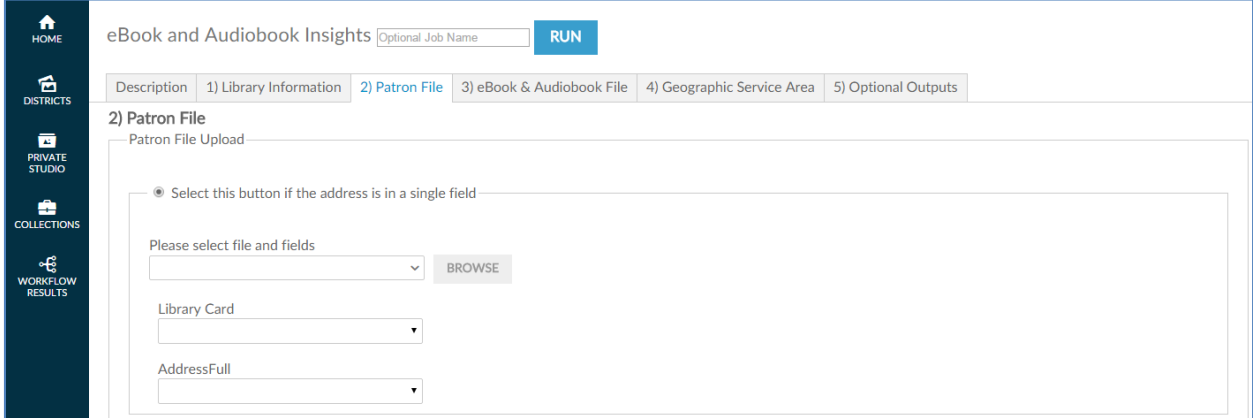
Click on the next tab or scroll down the page in your browser to continue.

5.1.4 eBook & AudioBook Insights – Patron File

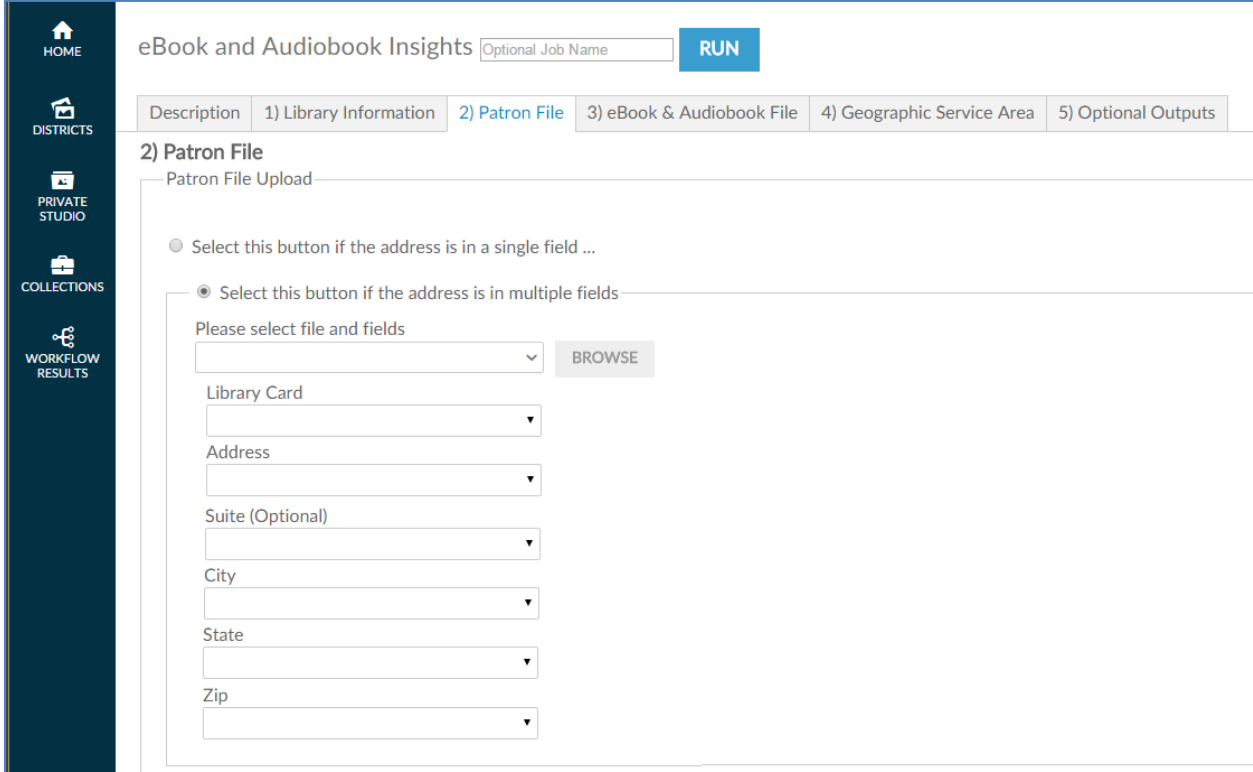
The next tab, **Patron File**, is where you upload the patron data file—normally an Excel— from your ILS. This file requires two specific pieces of information: a unique patron identifier (the patron’s library card number or eBook platform identifier) and the patron’s address.

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.

This screen shows the single-column address view.



The following screen shows the multiple-column address view.

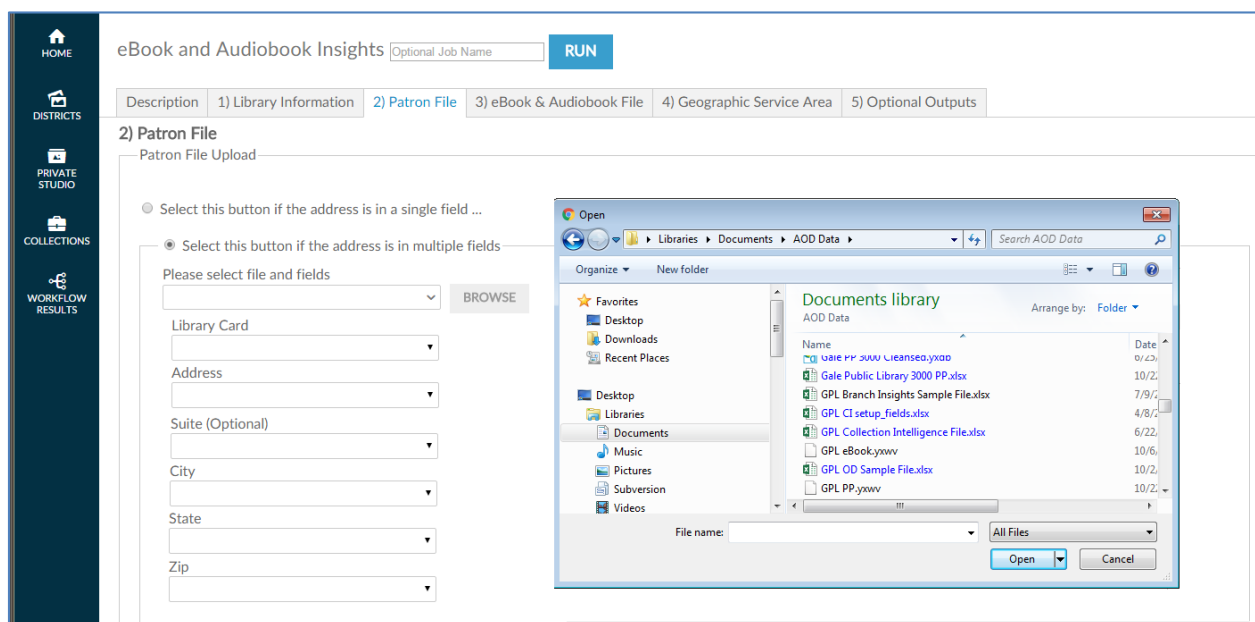


Once you select the address radio button for your input file, the next step is to click the **BROWSE** button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the workflow.

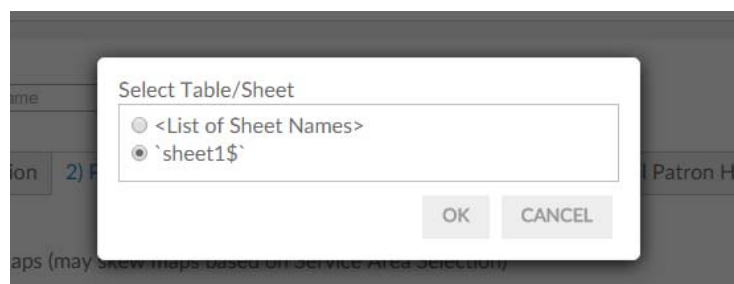
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (library card, and address). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

The screenshot shows a web interface for file selection. At the top, it says "Please select file and fields". Below this is a text input field containing "Gale Public Library 3000 PP.xl...]'sheet1\$" and a "Browse" button. Underneath is a section titled "LIBRARY CARD" with a dropdown menu labeled "Select a Field". The dropdown menu is open, showing a list of options: "Select a Field", "Street Number", "Street Name", "Street Suffix", "City", "State", "ZIP Code", "Address - Mapped to ADDRESS", "Circ Active", "TOT CHKOUT", and "Barcode". The "Barcode" option is currently selected and highlighted in blue. To the left of the dropdown menu, there is a radio button labeled "S" and a "Next" button.

Click **Next** at the lower left side of the screen to proceed to the next tab.

5.1.5 eBook & AudioBook Insights – eBook and AudioBook File

Your next step is to upload a data file—typically an Excel file—from your eBook platform System. This file requires three specific pieces of information: a) borrowed item format, b) the subject/genre identifier, which is usually a high-level identifier that facilitates returning printed material to the shelf, and c) the unique patron identifier (library card number or eBook platform patron number if it is also stored in the ILS).

You can choose the types of data to include in the file. For example, it can include any type of format identifier you want to analyze. Or you can use any subject/genre identifier if it exists in the eBook platform system. This capability allows filtering not only by the *eBook & Audiobook Insights* workflow—more on this to follow—but also by the eBook platform extract used to create the AOD input file.

eBook and Audiobook Insights **RUN**

Description 1) Library Information 2) Patron File **3) eBook & Audiobook File** 4) Geographic Service Area 5) Optional Outputs

3) eBook & Audiobook File

eBook and Audiobook File Upload

Upload a collection file from your electronic eBook vendor.

Please select file and fields

BROWSE

FORMATS

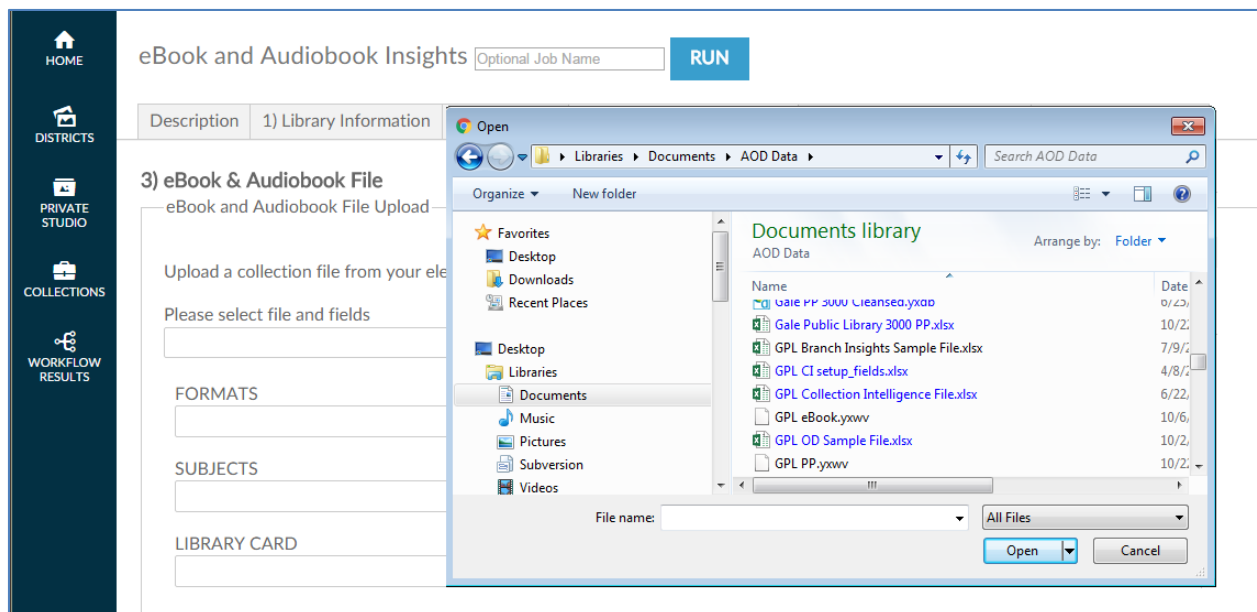
SUBJECTS

LIBRARY CARD

The next step is to click **BROWSE** to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking on browse, a pop-up screen asks you to identify the directory where the input file is located.

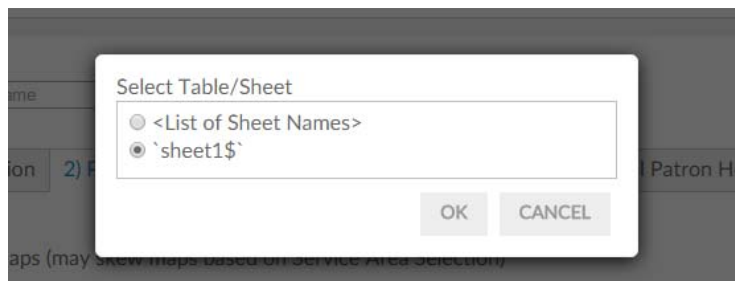
Note: You must have already extracted your input file from your ILS before accessing the workflow.

It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.



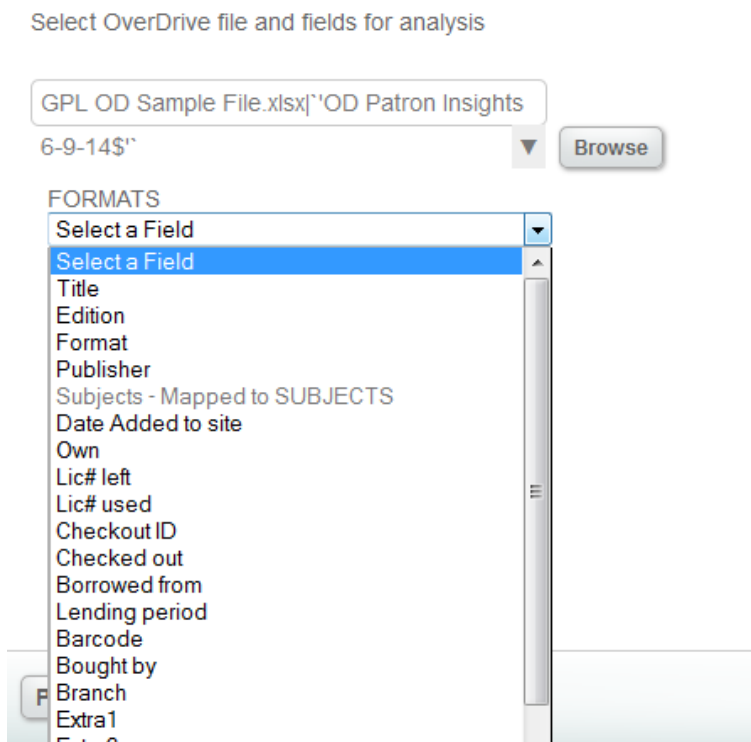
After you select the file, the AOD system asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (formats, subjects and library card). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.



Click on the next tab or scroll down the page in your browser to continue.

5.1.6 eBook & AudioBook Insights – Geographic Service Area

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files. If you are loading a spatial file, click the **OR Upload your library's service area file (spatial formats only)** button and then click on **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

When the file appears in the file window, bypass the geography tree and move to the next filter, which appears after the geography tree.

If selecting a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the **+** **sign** to expand the list and continue until you locate the geography you want. If selecting from the geography tree, you may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculation may take hours.

After you select a geography, scroll down the screen to the final filter on this tab: whether to include or exclude patrons outside the geography selected.

Finally, the **location filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Analyze only those patrons that fall WITHIN your service area (defined above)** includes patrons only if their addresses lie within the service area geography you defined earlier. Clicking **Analyze only those patrons that fall OUTSIDE OF your service area (defined above)** includes patrons only if their addresses lie outside the service area geography you defined earlier.

Location Filter:

- Analyze all patrons, regardless of their location.
- Analyze only those patrons that fall WITHIN your service area (defined above).
- Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

5.1.7 eBook & AudioBook Insights – Optional Outputs

The final step in the process before running the report is to decide whether you want to include maps or other reports/files in the output.

eBook and Audiobook Insights

Description | 1) Library Information | 2) Patron File | 3) eBook & Audiobook File | 4) Geographic Service Area | 5) Optional Outputs

5) Optional Outputs

Note:

After execution, you will only see a preview of one output file by default. To view additional outputs you can toggle between output files using the drop down menu next to the text "Output File:" and just below the name of the app in the app result window. Sorry, no preview is available for the map output.

You may also see a list of all outputs from this app by clicking on the "bulleted list" button in the top right corner of the app results window.

Include as Additional Output:

- Maps of patron borrowers (may increase processing time).
- Summary report of your patron data "health".
- Patron records with address or date issues.
- Patron records that failed to match to Experian households.

There are four optional outputs available.

- a) **Maps of patron borrowers** - These maps include visuals of the home locations, arranged by material type and genre, of patrons who have checked out materials. The maps add a useful visual enhancement to the analysis of the charts and tables of the base report. With the maps, you

can see at a glance which portion of your trade area tends to check out various genres and formats most often. **Note:** Selecting the additional maps adds processing time to your report and increases the size of final report.

- b) **Summary of your patron data “health”** – this will create a report outlining the number of records found in your patron file with the number of good/bad records found as well as the number of records found on Experian. It will also tell you the reasons for any bad data that was found.
- c) **Patron records with address or date issues** – this will create a downloadable file of all patron address records that were bad and the reason why they could not be processed.
- d) **Patron records that failed to match to Experian households** – this will create a downloadable file of the patron addresses that could not be found on the Experian household file.

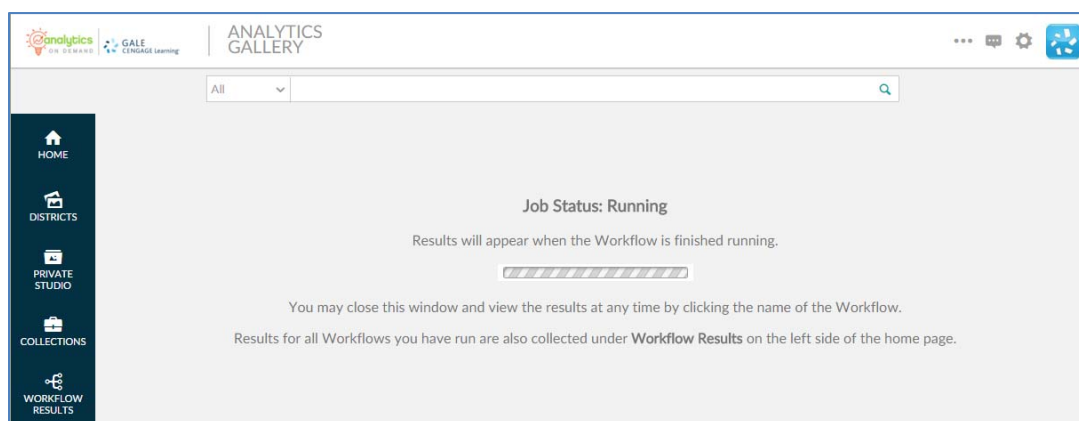
Note: There are several reasons for Experian not having a match for a specific household. Among other things a consumer needs to be active at an address for some amount of time before Experian can profile them. The household might be vacant or for sale. Excluding the Suite number in areas of high rise and multiple dwelling units lowers your match rate. And finally, the Experian data is updated quarterly so it may take time to work itself through the system.

Simply click the box to include the options you want or leave it blank if you elect not to.

Selecting maps is the final step in this process.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the **COLLECTIONS** link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the **WORKFLOW RESULTS** link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

6.0 MARKETING ACTION (PATRONS)

6.0 MARKETING ACTION (PATRONS)

This section provides a detailed description of the *Marketing Action (Patrons)* workflow. This workflow allows you to analyze existing library patrons residing in your library's service area that fit a particular demographic profile. This workflow is designed to work with the same input file used for Patron Profiles, although it will optionally use an email address field if your library captures that information on a patron record.

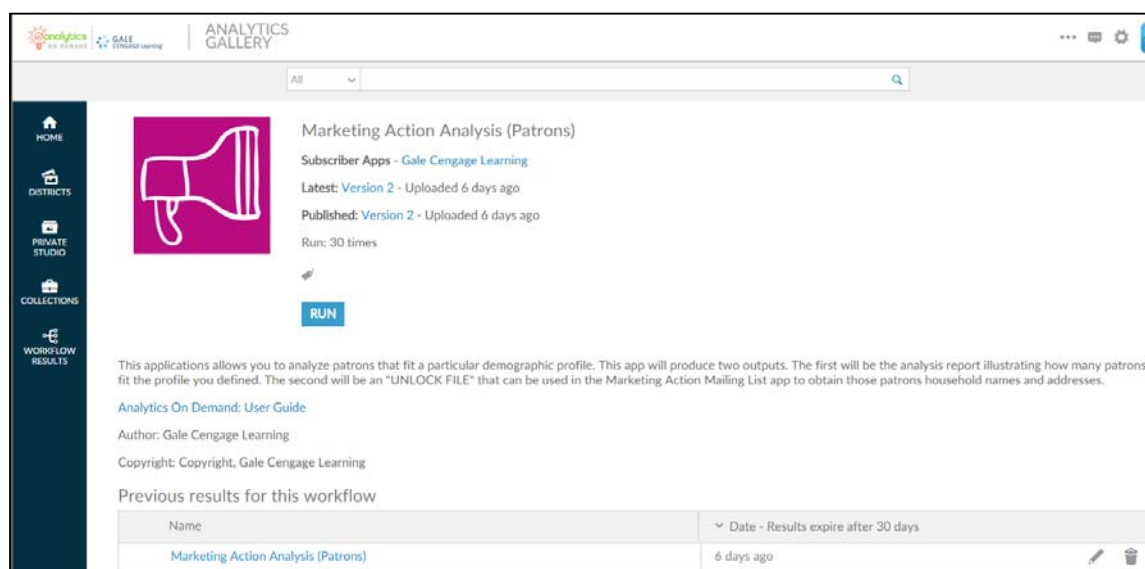
There are two separate workflows included when you subscribe to this workflow, the *Marketing Action Analysis (Patrons)* workflow and the *Marketing Action Mailing List (Patrons)*. The Marketing Action Analysis workflow identifies a subset of your existing patrons that would be targeted for specialized programs, new content, or even fund raising, to name a few uses. This workflow allows multiple runs in order to narrow down the exact type of patron groups you want to reach. When the analysis is completed, the *Marketing Action Mailing List (Patrons)* workflow will generate the actual list of households.

6.1 Marketing Action Analysis (Patrons)

This section provides a detailed description of the *Marketing Action Analysis (Patrons)* workflow. This workflow will produce two outputs. The first will be the analysis report illustrating how many patrons fit the profile you defined. The second will be an "UNLOCK FILE" in .csv format that can be used in the *Marketing Action Mailing List* workflow to obtain those patron household names and addresses.

6.1.1 Marketing Action Analysis (Patrons) – Initial Screen

The following screen appears when you click the *Marketing Action Analysis* workflow:



The screenshot displays the Analytics Gallery interface for the "Marketing Action Analysis (Patrons)" workflow. The interface includes a sidebar with navigation options: HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area shows the workflow details:

- Marketing Action Analysis (Patrons)**
- Subscriber Apps - Gale Cengage Learning
- Latest: Version 2 - Uploaded 6 days ago
- Published: Version 2 - Uploaded 6 days ago
- Run: 30 times
- A blue **RUN** button is visible.

Below the details, there is a description: "This application allows you to analyze patrons that fit a particular demographic profile. This app will produce two outputs. The first will be the analysis report illustrating how many patrons fit the profile you defined. The second will be an 'UNLOCK FILE' that can be used in the Marketing Action Mailing List app to obtain those patrons household names and addresses." It also includes links for "Analytics On Demand: User Guide", "Author: Gale Cengage Learning", and "Copyright: Copyright, Gale Cengage Learning".

At the bottom, there is a section for "Previous results for this workflow" with a table:

Name	Date - Results expire after 30 days
Marketing Action Analysis (Patrons)	6 days ago

This screen provides the following key information:

Version number – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.

- **A summary description of what the Marketing Action Analysis workflow does:** “This workflow allows you to analyze patrons residing in your library's service area that fit a particular demographic profile. This workflow will produce two outputs. The first will be the analysis report illustrating how many patrons fit the profile you defined. The second will be an "UNLOCK FILE" that can be used in the Marketing Action Mailing List workflow to obtain those patrons household names and addresses.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide.
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

6.1.2 Marketing Action Analysis (Patrons) – Description

When you click **RUN**, the following screen appears. Note that the screen displays seven tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands.

Marketing Action Analysis (Patrons) **RUN**

Description | 1) Library Information | 2) Library Patrons | 3) Patron Profile | 4) Geographic Service Area | 5) Optional Outputs | Attention!

Description
This Marketing Action Analysis report will allow you to identify existing patrons for mail outreach programs:
BEFORE proceeding, you must have extracted one file – a patron file from your ILS. This file should be saved on your hard drive. You will be given an option to select this file in the LIBRARY PATRONS tab.
This app will produce two outputs. The first will be th analysis report illustrating how many patrons/non-patrons fit the profile you defined. The second will be an "UNLOCK FILE" that can be used in the Marketing Action Mailing List app to obtain those patron household names and addresses.

1) LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.

2) LIBRARY PATRONS:
- Upload a library patron file that you previously saved to your hard drive. This file MUST have only ONE piece of information: patron address. You have the option of including a patron email address as well.
- Verify the correct field(s) are selected once the file loads.
- Additionally, you may filter patrons by last active date and checkout ranking

3) PATRON PROFILE:
- From the drop down menus provided, select the specific demographic filters that will be used to match against households in your service area.

4) GEOGRAPHIC SERVICE AREA
- Select the geography of your library's service area. You may also select a custom geography created by DemographicsNow or any other accepted spatial format (YXDB, SHP, TAB, KML). You may also select from a list of pre-defined geographies. This can be by county, zip code, city, block group, census tracts or any other defined geography.
- Additionally, select the radio button that determines whether you only want to analyze all patrons regardless of the geographic area, only those patrons within the service area, or only those patrons outside of the service area.

5) OPTIONAL OUTPUTS:
- Choose to output Patron records that matched filter criteria, a summary report of your data "health", data records that could not be processed, and records that could not be matched to Experian.

This tab allows you to name an output report in the text box located in the upper left portion of the screen:

Marketing Action Analysis (Patrons)

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

6.1.3 Marketing Action Analysis (Patrons) – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from their home to the library
- To choose whether or not to display the library location on any maps views when it is outside of the selected Service Area

The screenshot displays the 'Marketing Action Analysis (Patrons)' web interface. At the top, there is a header with a 'HOME' icon, the title 'Marketing Action Analysis (Patrons)', an 'Optional Job Name' input field, and a 'RUN' button. Below the header is a navigation bar with tabs: 'Description', '1) Library Information' (selected), '2) Library Patrons', '3) Patron Profile', '4) Geographic Service Area', '5) Optional Outputs', and 'Attention!'. The main content area is titled '1) Library Information' and contains the instruction 'Fill in the following information for your library location'. The form includes input fields for 'Library Name', 'Address', 'City', 'State' (a dropdown menu currently showing 'AL'), and '5-digit zip code'. Below these fields is a 'Map Options' section with a checkbox labeled 'Force Library Location on Map (may skew map based on Service Area selection)'. A dark blue sidebar on the left contains icons and labels for 'HOME', 'DISTRICTS', 'PRIVATE STUDIO', 'COLLECTIONS', and 'WORKFLOW RESULTS'.

Click on the next tab or scroll down the page in your browser to continue.

6.1.4 Marketing Action Analysis (Patrons) – Library Patrons

The next tab, Library **Patrons**, is where you upload the patron data file—normally an Excel— from your ILS. This file requires three specific pieces of information: a patron address, the last active date for this patron, and an optional email address (if your library captures that information in the patron record).

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.

This screen shows the single-column address view.

Marketing Action Analysis (Patrons) **RUN**

Description 1) Library Information **2) Library Patrons** 3) Patron Profile 4) Geographic Service Area 5) Optional Outputs Attention!

2) Library Patrons

Please select the patron input file containing the field(s) required for this report

Select this button if the address is in a single field

Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron address field.

Please select the file and fields below:

BROWSE

AddressFull

Date

Checkouts (Optional)

Email Address (Optional)

Select this button if the address is in multiple fields ...

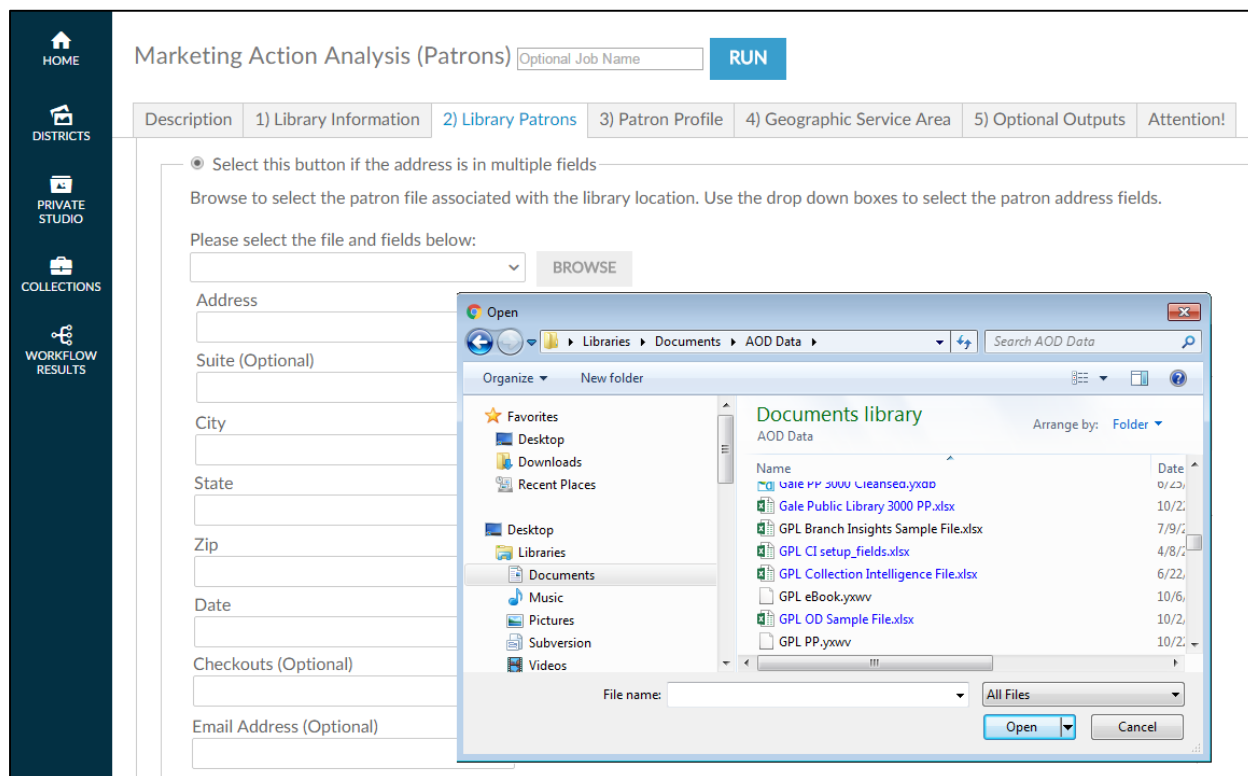
The following screen shows the multiple-column address view.

Once you select the address radio button for your input file, the next step is to click the **BROWSE** button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the workflow.

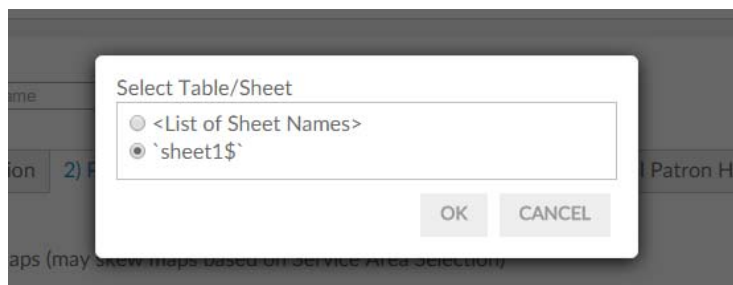
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, activity date and email address). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron address field.

Please select the file and fields below:

Gale Public Library 3000 PP.xl... sheet1\$

ADDRESS

Address #1
 Select a Field
 Street Number
 Street Name
 Street Suffix
 Address #1
 City
 State
 ZIP Code
 Address
 Circ Active
 TOT CHKOUT
 Barcode

After aligning the fields to your input data file, you have the option to filter your patrons by their last active date. The default, as shown below, is all patrons, regardless of Last Active Date.

Date Filter:

Analyze all patrons, regardless of Last Active Date:

Filter by Last Active Date:

Set the date filters to only include patrons within activity between the FROM and TO dates.

FROM:

TO:

If you elect to only include groups of patrons by their activity date, click on the FILTER BY LAST ACTIVE DATE and the following window appears:

Date Filter:

Analyze all patrons, regardless of Last Active Date:

Filter by Last Active Date:

Set the date filters to only include patrons within activity between the FROM and TO dates.

FROM:

November 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

TO:

November 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

You can now select a beginning and ending date window of activity and the workflow will exclude any patron that has a last active date that falls outside of this window.

You may also filter by the number of checkouts by selecting the Checkout Ranking option.

Checkout Ranking

Top ▼

% of Patrons:
100

*100 = All Patrons

This option will allow you to specify the top or bottom percentage of your patrons to include in the analysis. To determine the top/bottom percent all checkouts are summarized at the household level. Then the top or bottom percentage you specified are included in the analysis. The remaining patron records are not included.

Click on the next tab or scroll down the page in your browser to continue.

6.1.5 Marketing Action Analysis (Patrons) – Patron Profile

Your next step is to select specific filters to narrow down the exact demographic profile of the patrons you want to reach.

The screenshot shows the 'Marketing Action Analysis (Patrons)' interface. At the top, there is a 'RUN' button and an 'Optional Job Name' input field. Below this is a navigation bar with tabs: 'Description', '1) Library Information', '2) Library Patrons', '3) Patron Profile' (which is active), '4) Geographic Service Area', '5) Optional Outputs', and 'Attention!'. The main content area is titled '3) Patron Profile' and includes a descriptive paragraph: 'Use the drop down boxes to select each filter. The output report will provide a count of potential mail list candidates in each filter chosen. A hierarchy methodology is employed in generating the final counts. For example, first select the Mosaic cluster, then the demographics to filter this list further.' Below this is a 'Build Patron Profile:' section with a list of filter options, each with a radio button: 'Mosaic Group ...', 'Household Income ...', 'Children in Household ...', 'Length of Residence ...', and 'Type of Dwelling ...'.

You will build your patron profile by selecting the demographic attributes. If you do not want to select a 'slice' or 'portion' of a demographic variable, simply do not click on the radio button next to it. All of that particular attribute will be included. On demographic attributes you do want to filter, click on the box next to the attribute to select each filter.

Build Patron Profile:

- Mosaic Group ...
- Household Income ...
- Children in Household ...
- Length of Residence ...
- Type of Dwelling ...

The output report will provide a count of potential mail list candidates in each filter chosen. A hierarchy methodology is employed in generating the final counts. For example, first select the Mosaic cluster, then the demographics to filter this list further. The following image demonstrates the selection of only one Mosaic cluster (American Royalty) which will NOT filter on household income, children in household or length of residence. In other words, the report will not exclude anyone based on their income, whether they have or not have children in the household, how long they have lived in their home or the type of dwelling they live in.

Build Patron Profile:

- Mosaic Group
 - Select the Mosaic group and cluster
 - Power Elite
 - American Royalty
 - Platinum Prosperity
 - Kids and Cabernet
 - Picture Perfect Families
 - Couples with Clout
 - Jet Set Urbanites
 - Flourishing Families
 - Booming with Confidence
 - Suburban Style
- Household Income ...
- Children in Household ...
- Length of Residence ...

Click on the next tab or scroll down the page in your browser to continue.

6.1.6 Marketing Action Analysis (Patrons) – Geographic Service Area

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

The screenshot shows the 'Marketing Action Analysis (Patrons)' interface. At the top, there is a 'RUN' button and an 'Optional Job Name' input field. Below this is a progress bar with steps: 1) Library Information, 2) Library Patrons, 3) Patron Profile, 4) Geographic Service Area (highlighted), 5) Optional Outputs, and Attention!. The main content area is titled '4) Geographic Service Area' and contains the following sections:

- Service Area:**
 - Define your library's service area here
 - Select geographies that define the library service area. Click the (+) sign to expand the tree.
 - Block Groups
 - CCDs/MCDs by County
 - Census Tracts
 - Congressional Districts (114th)
 - Counties
 - DMA by State
 - Metro CBSAs by State
 - Places
 - States
 - ZIP Codes by County
 - Upload your library's service area file (spatial formats only) ...
- Location Filter:**
 - Analyze all patrons, regardless of their location.
 - Analyze only those patrons that fall WITHIN your service area (defined above).
 - Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files. If you are loading a spatial file, click the **OR Upload your library's service area file (spatial formats only)** button and then click on **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

If selecting a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the + **sign** to expand the list and continue until you locate the geography you want. If selecting from the geography tree, you may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculation may take hours.

The final decision you will need to make is a decision as to whether to include all of your patrons, only those patrons that reside within the geographic area you have chosen, or only those patrons that reside outside the geographic area you have chosen. The default is to only select the patrons in the geography chosen, so change this selection if you elect to include everyone, regardless of where they live.

Location Filter:

Analyze all patrons, regardless of their location.

Analyze only those patrons that fall WITHIN your service area (defined above).

Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

Click on the next tab or scroll down the page in your browser to continue.

6.1.7 Marketing Action Analysis (Patrons) – Optional Outputs

The next step in the process before running the report is to decide whether you want to include additional files or reports in the output.

The screenshot shows the 'Marketing Action Analysis (Patrons)' interface. On the left is a dark sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area has a header with 'Marketing Action Analysis (Patrons)', an input field for 'Optional Job Name', and a blue 'RUN' button. Below the header is a tabbed interface with tabs for 'Description', '1) Library Information', '2) Library Patrons', '3) Patron Profile', '4) Geographic Service Area', '5) Optional Outputs', and 'Attention!'. The '5) Optional Outputs' tab is active, displaying the title '5) Optional Outputs' and the instruction 'Check to include any of these optional outputs:'. There are four checkboxes with corresponding text:

- Output Patron records matching filter criteria
 - * these will be standardized CASS addresses with summarized checkouts and last activity dates (one record per household)
- Summary report of your patron data "health".
- Patron records with address or date issues.
- Patron records that failed to match to Experian households.

There are four optional outputs available.

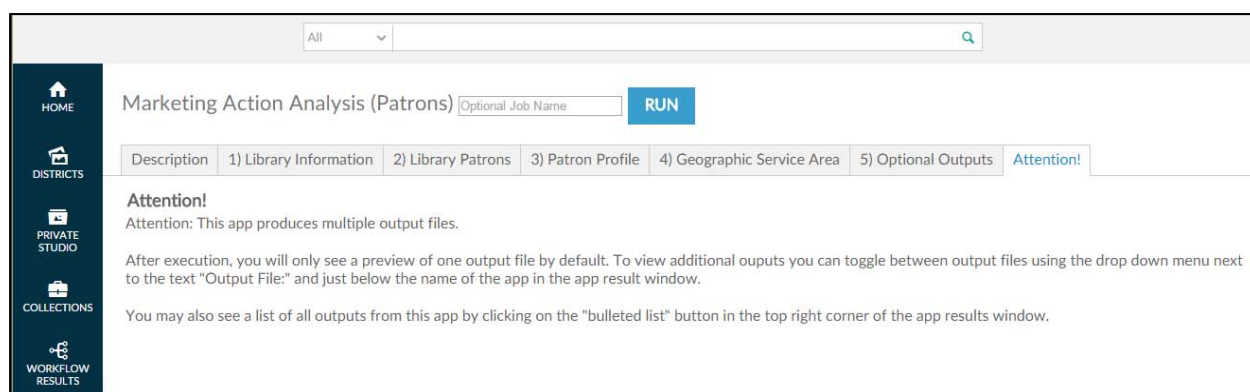
- a) **Output Patron records matching filter criteria** – This will create a downloadable file of patrons who have matched your selections on the Patron Profile tab. These addresses will be standardized to the CASS household address and the last activity date and checkout counts for each will be summarized to include all patrons in that household.
- b) **Summary of your patron data “health”** – this will create a report outlining the number of records found in your patron file with the number of good/bad records found as well as the number of records found on Experian. It will also tell you the reasons for any bad data that was found.
- c) **Patron records with address or date issues** – this will create a downloadable file of all patron address records that were bad and the reason why they could not be processed.
- d) **Patron records that failed to match to Experian households** – this will create a downloadable file of the patron addresses that could not be found on the Experian household file.

Note: There are several reasons for Experian not having a match for a specific household. Among other things a consumer needs to be active at an address for some amount of time before Experian can profile them. The household might be vacant or for sale. Excluding the Suite number in areas of high rise and multiple dwelling units lowers your match rate. And finally, the Experian data is updated quarterly so it may take time to work itself through the system.

Simply click the box to include the options you want or leave it blank if you elect not to.

6.1.8 Marketing Action Analysis (Patrons) – Attention!

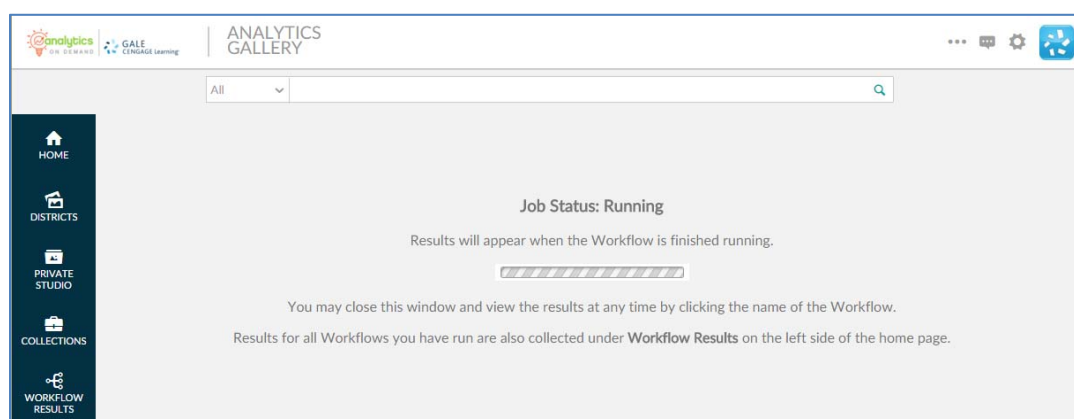
The final step in the process before running the simply requires you to be familiar with the type of outputs this particular workflow generates. There are no filters, uploads, or decisions that need to be made in this tab.



Specifically, this tab explains that you will receive two outputs. One will be the brief report that includes a table to identify the households that fell in to each one of the filters (along with a map) and the second will be the .csv file you will need to upload in to the Marketing Action Mailing List (Patrons) workflow to generate the actual list.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.

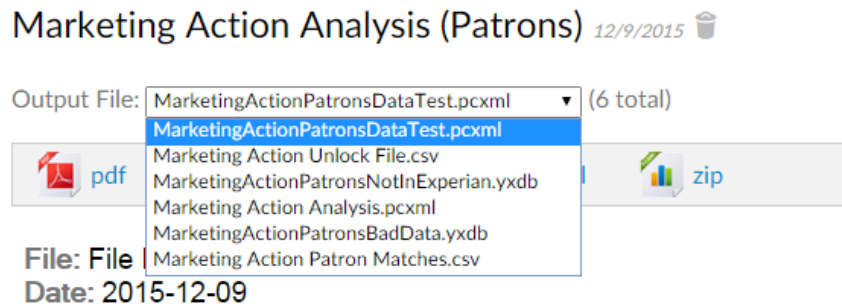


Please note that it is not necessary to wait until the analysis completes. By clicking the COLLECTIONS link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

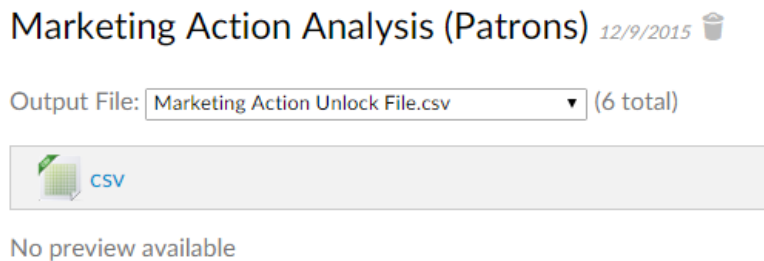
When the analysis is finished, the results can be found in the WORKFLOW RESULTS link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

As shown below, once the analysis is complete you can switch from one output to the other by clicking on the drop down arrow at the top of the page to select between the two. The files created by your Optional Output settings will also appear here.



If you are satisfied with the count of households from the analysis, select the Marketing Action Unlock File.csv option and the screen will switch to that output, as shown below.



Simply click on the csv icon and a box will appear to allow you to open it or save it to your hard drive.

You can then find and select this file when running the Marketing Action Mailing List (Patrons) workflow.

6.2 Marketing Action Mailing List (Patrons)

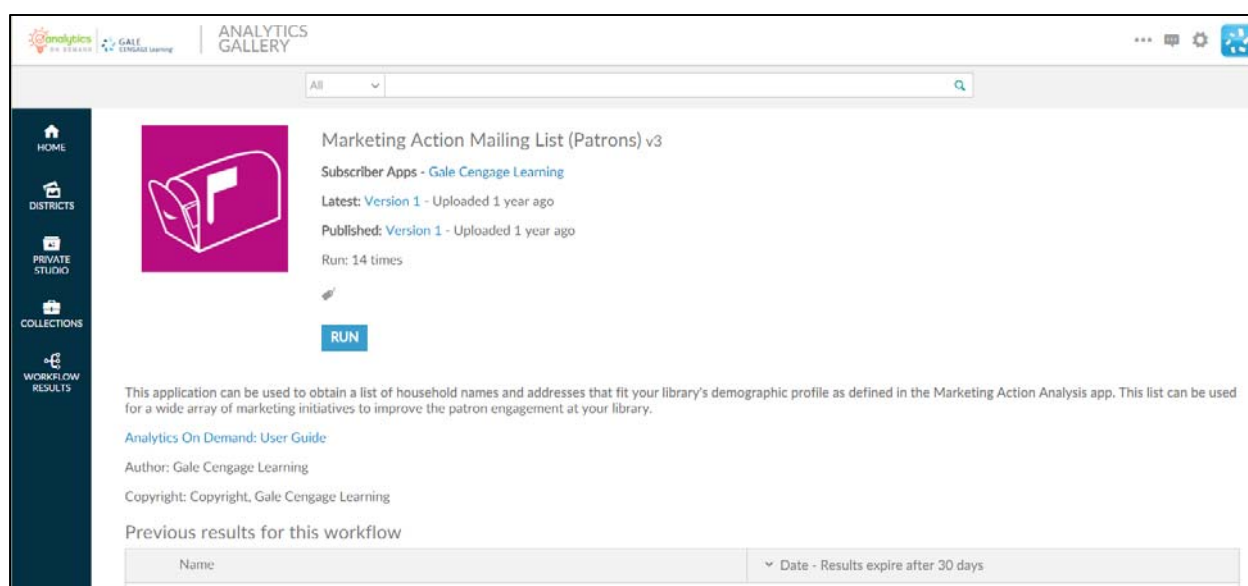
This section provides a [detailed](#) description of the *Marketing Action Mailing List (Patrons)* workflow.

There are two separate workflows included when you subscribe to the *Marketing Action (Patrons)* workflow, the *Marketing Action Analysis* workflow and the *Marketing Action Mailing List (Patrons) workflow*. The *Marketing Action Mailing List (Patrons)* workflow is used to output the actual list of households created by the *Marketing Action Analysis* workflow.

This workflow will produce one output – the household mailing list of existing patrons you are targeting.

6.2.1 Marketing Action Mailing List (Patrons) – Initial Screen

The following screen appears when you click the *Marketing Action Mailing List (Patrons)* workflow:

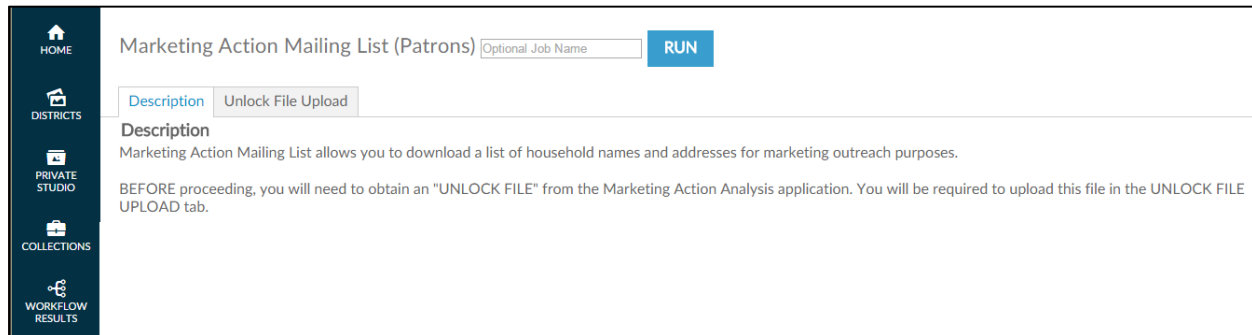


This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of what the Marketing Action Mailing List (Patrons) workflow does:** “This workflow can be used to obtain a list of household names and addresses that fit your library's demographic profile as defined in the Marketing Action Analysis workflow. This list can be used for a wide array of marketing initiatives to improve the patron engagement at your library.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide.
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

6.2.2 Marketing Action Mailing List (Patrons) – Description

When you click **RUN**, the following screen appears. Note that the screen displays only two tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands.



This tab allows you to name an output report in the text box located in the upper left portion of the screen:

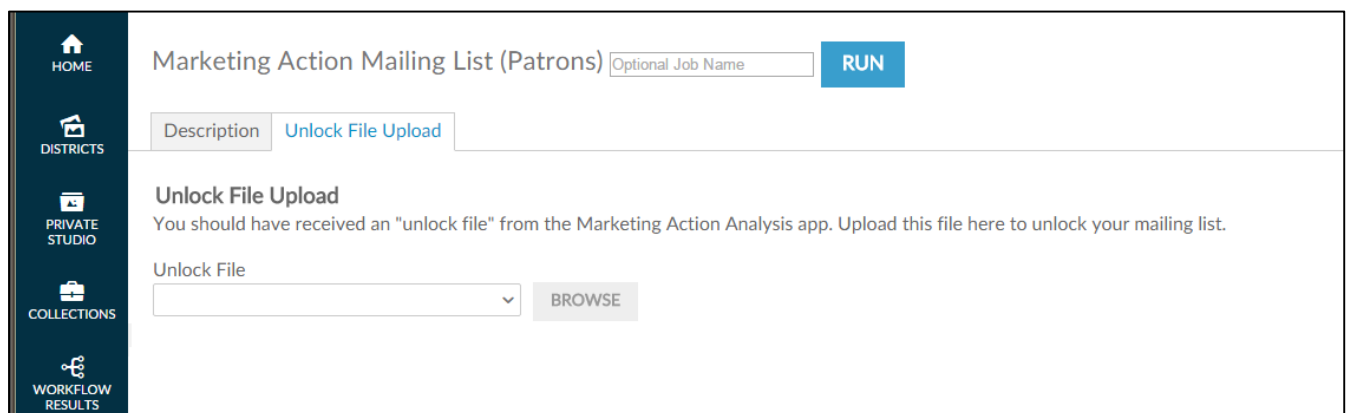
Marketing Action Mailing List (Patrons)

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

6.2.3 Marketing Action Mailing List (Patrons) – Unlock File Upload

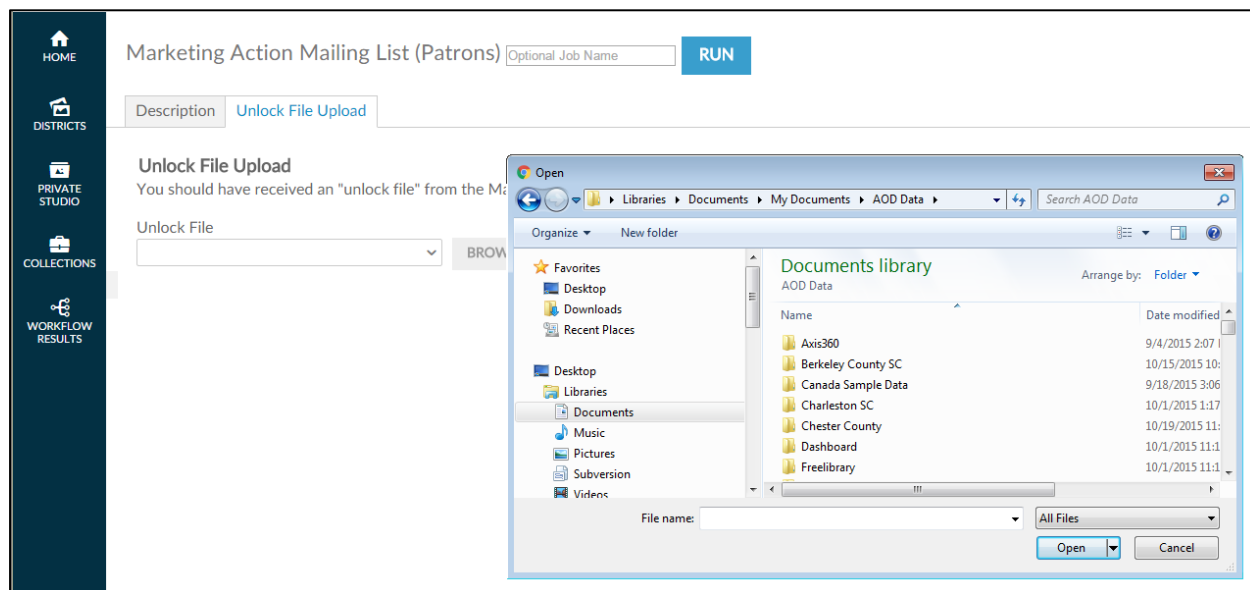
The **Unlock File Upload** tab is where you upload the .csv file you created in the Marketing Action Analysis (Patrons) workflow.



Click the **BROWSE** button to browse for the .csv input file located on your hard drive and/or network drive for uploading. This process (of uploading) is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already ran the Marketing Action Analysis (Patrons) workflow and saved the .csv input file before accessing this workflow.

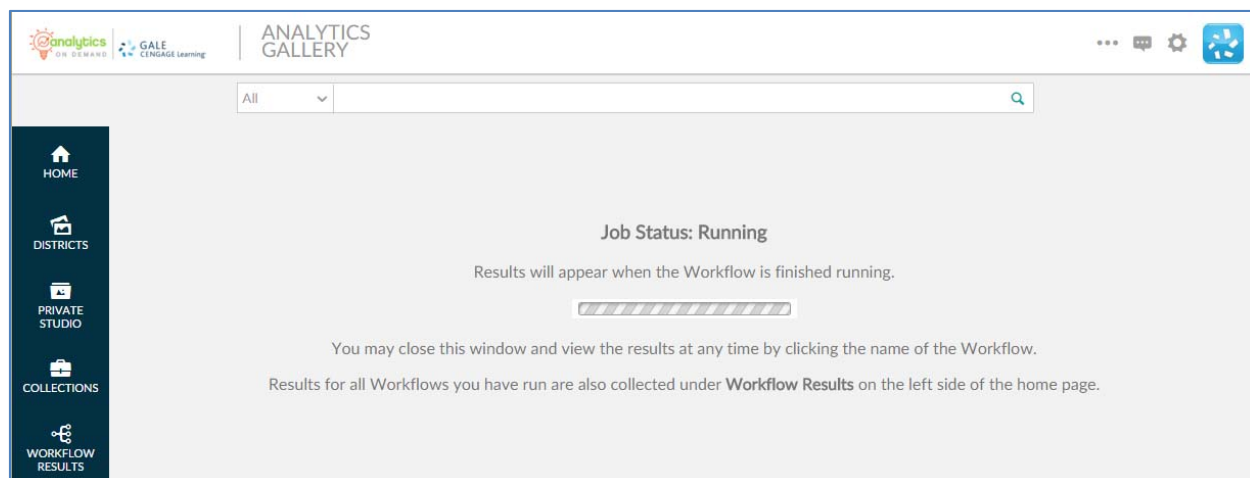
As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the .csv file you may immediately run the workflow.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the COLLECTIONS link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the WORKFLOW RESULTS link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

The mailing list will appear on screen. Select the output you want to save the mailing to by clicking on the file types above the list.

Marketing Action Mailing List (Patrons) 12/15/2015 RE-RUN

Output File: Mailing List.pcxml (1 total) 📄 ☰

📄 pdf
📄 docx
📄 xlsx
📄 html
📄 zip

Email Address	SURNAME	ADDRESS 1	ADDRESS 2	CITY	STATE	ZIP	ZIP4	Total Checkouts	Last Active Date
1234318	BAKKO	27850 BAYBERRY RD		FARMINGTON	MI	48331	3307	0	2006-04-20
2570354	AJUTO	27850 PEPPERMILL RD		FARMINGTON	MI	48331	3327	200	2012-06-05
1053251	BURKE	27880 PEPPERMILL RD		FARMINGTON	MI	48331	3327	12	2012-10-10
2770421	SCHATZLE	27882 GREEN WILLOW ST		FARMINGTON	MI	48331	5629	1729	2005-11-30
2493208	BABICS	27890 PEPPERMILL RD		FARMINGTON	MI	48331	3327	43	2012-07-12
2424535 1052290	MCCABE	27891 GREEN WILLOW ST		FARMINGTON	MI	48331	5631	2561	2013-11-04
1931009	SCHNEIDER	27904 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	184	2005-12-12
2496172	PEARSON	27925 GREEN WILLOW ST		FARMINGTON	MI	48331	5606	83	2004-04-02
2504082	KENNEDY	27942 BAYBERRY RD		FARMINGTON	MI	48331	3380	0	2011-02-15
2286792	ZACHARIA	27947 GREEN WILLOW ST		FARMINGTON	MI	48331	5606	126	2008-07-15
2509971 2779261	GABRIELIAN	27948 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	823	2013-12-26
2415360	GREEN	27960 BAYBERRY RD		FARMINGTON	MI	48331	3310	0	2010-09-26
2465700	BOLLIN	27970 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	0	2013-10-23
1230921 2588769	LEMPICKI	27978 BAYBERRY RD		FARMINGTON	MI	48331	3310	0	2011-03-21
1939812 2331287	KING	27991 GREEN WILLOW ST		FARMINGTON	MI	48331	5606	2116	2000-07-07
1029873 1166892 2329565	LEECH	27992 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	4217	2004-12-18

7.0 MARKETING ACTION (NON-PATRONS)

7.0 MARKETING ACTION (NON-PATRONS)

This section provides a detailed description of the *Marketing Action (Non-Patrons)* workflow. This workflow allows you to analyze potential new library patrons residing in your library's service area that fit a particular demographic profile. This workflow is designed to work with the same input file used for Patron Profiles.

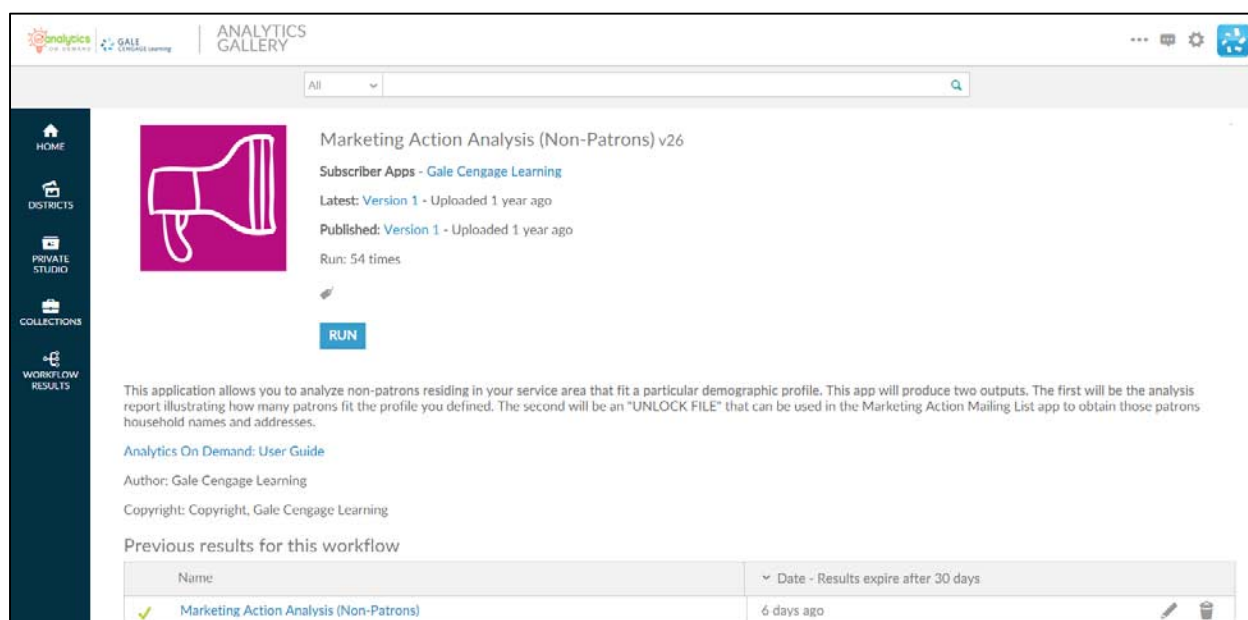
There are two separate workflows included when you subscribe to this workflow, the *Marketing Action Analysis (Non-Patrons)* workflow and the *Marketing Action Mailing List (Non-Patrons)*. The Marketing Action Analysis workflow identifies a subset of potential new patrons that would be targeted to sign up for a library card to use the library. This workflow allows multiple runs in order to narrow down the exact type of patron groups you want to reach. When the analysis is completed, the *Marketing Action Mailing List (Non-Patrons)* workflow will generate the actual list of households.

7.1 Marketing Action Analysis (Non-Patrons)

This section provides a detailed description of the *Marketing Action Analysis (Non-Patrons)* workflow. This workflow will produce two outputs. The first will be the analysis report illustrating how many non-patrons fit the profile you defined. The second will be an "UNLOCK FILE" in .csv format that can be used in the *Marketing Action Mailing List* workflow to obtain those non-patron household names and addresses.

7.1.1 Marketing Action Analysis (Non-Patrons) – Initial Screen

The following screen appears when you click the *Marketing Action Analysis* workflow:



The screenshot shows the Analytics Gallery interface. On the left is a navigation sidebar with options: HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area displays a workflow card for "Marketing Action Analysis (Non-Patrons) v26". The card features a purple megaphone icon, the title "Subscriber Apps - Gale Cengage Learning", and metadata: "Latest: Version 1 - Uploaded 1 year ago", "Published: Version 1 - Uploaded 1 year ago", and "Run: 54 times". A blue "RUN" button is visible. Below the card, there is a descriptive paragraph: "This application allows you to analyze non-patrons residing in your service area that fit a particular demographic profile. This app will produce two outputs. The first will be the analysis report illustrating how many patrons fit the profile you defined. The second will be an 'UNLOCK FILE' that can be used in the Marketing Action Mailing List app to obtain those patrons household names and addresses." Below this is a link for "Analytics On Demand: User Guide", the author "Gale Cengage Learning", and the copyright "Copyright: Copyright, Gale Cengage Learning". At the bottom, a section titled "Previous results for this workflow" contains a table with one entry:

Name	Date - Results expire after 30 days
✓ Marketing Action Analysis (Non-Patrons)	6 days ago

This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of what the Marketing Action Analysis workflow does:** “This workflow allows you to analyze non-patrons residing in your library’s service area that fit a particular demographic profile. This workflow will produce two outputs. The first will be the analysis report illustrating how many non-patrons fit the profile you defined. The second will be an "UNLOCK FILE" that can be used in the Marketing Action Mailing List workflow to obtain those non-patron household names and addresses.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide.
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

7.1.2 Marketing Action Analysis (Non-Patrons) – Description

When you click **RUN**, the following screen appears. Note that the screen displays seven tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands.

Marketing Action Analysis (Non-Patrons) **RUN**

Description | 1) Library Information | 2) Library Patrons | 3) Patron Profile | 4) Geographic Service Area | 5) Optional Outputs | Attention!

Description
This Marketing Action Analysis report will allow you to identify non-patrons residing in your library's service area for mail outreach programs:
BEFORE proceeding, you must have extracted one file – a patron file from your ILS. This file should be saved on your hard drive. You will be given an option to select this file in the LIBRARY PATRONS tab.

This app will produce two outputs. The first will be the analysis report illustrating how many patrons/non-patrons fit the profile you defined. The second will be an "UNLOCK FILE" that can be used in the Marketing Action Mailing List app to obtain those non-patron household names and addresses.

1) LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.

2) LIBRARY PATRONS:
- Upload a library patron file that you previously saved to your hard drive. This file MUST have only ONE piece of information: patron address. You have the option of including a patron email address as well.
- Verify the correct field(s) are selected once the file loads.
- Additionally, you may filter patrons by last active date.

3) PATRON PROFILE
- Option to receive "Unlock File" for use in the Mailing List app.
- From the drop down menus provided, select the specific demographic filters that will be used to match against households in your service area.

4) GEOGRAPHIC SERVICE AREA
- Select the geography of your library's service area. You may also select a custom geography created by DemographicsNow or any other accepted spatial format (YXDB, SHP, TAB, KML). You may also select from a list of pre-defined geographies. This can be by county, zip code, city, block group, census tracts or any other defined geography.

5) OPTIONAL OUTPUTS
- Choose to output a summary report of your data "health" and data records that could not be processed.

This tab allows you to name an output report in the text box located in the upper left portion of the screen:

Marketing Action Analysis (Non-Patrons)

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

7.1.3 Marketing Action Analysis (Non-Patrons) – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library’s location in order to map this on map views in the report
- To calculate the drive time for each library patron from their home to the library
- To choose whether or not to display the library location on any maps views when it is outside of the selected Service Area

The screenshot displays the 'Marketing Action Analysis (Non-Patrons)' interface. At the top, there is a title bar with a 'RUN' button and an 'Optional Job Name' input field. Below this is a navigation bar with tabs: 'Description', '1) Library Information', '2) Library Patrons', '3) Patron Profile', '4) Geographic Service Area', '5) Optional Outputs', and 'Attention!'. The '1) Library Information' tab is active. The main content area is titled '1) Library Information' and contains the instruction 'Fill in the following information for your library location'. Below this are several input fields: 'Library Name', 'Address', 'City', 'State' (a dropdown menu currently showing 'AL'), and '5-digit zip code'. A dark blue sidebar on the left contains navigation icons for 'HOME', 'DISTRICTS', 'PRIVATE STUDIO', 'COLLECTIONS', and 'WORKFLOW RESULTS'.

Click on the next tab or scroll down the page in your browser to continue.

7.1.4 Marketing Action Analysis (Non-Patrons) – Library Patrons

The next tab, **Library Patrons**, is where you upload the patron data file—normally an Excel—from your ILS. As the *Marketing Action Analysis* workflow is used for both the PATRONS and NON-PATRONS workflows, it is asking for information that will not actually be used for NON-PATRONS. However, since it is using the same input file used for *Patron Profiles*, the information is in that file and needs to be aligned in this step. This file requires two specific pieces of information: a patron address, and the last

active date. In effect, you can specify an activity date of several years back and the patrons that were not active in this time period would be included in the new patron mailing list.

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.

This screen shows the single-column address view.

The screenshot displays the 'Marketing Action Analysis (Non-Patrons)' interface. On the left is a dark sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area has a header with 'Marketing Action Analysis (Non-Patrons)', an 'Optional Job Name' input field, and a 'RUN' button. Below the header is a tabbed interface with tabs for 'Description', '1) Library Information', '2) Library Patrons' (selected), '3) Patron Profile', '4) Geographic Service Area', '5) Optional Outputs', and 'Attention!'. The '2) Library Patrons' section contains the following elements:

- A heading '2) Library Patrons' and a sub-heading 'Please select the patron input file containing the field(s) required for this report'.
- A radio button selected for 'Select this button if the address is in a single field'.
- Text: 'Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron address field.'
- Text: 'Please select the file and fields below:'
- A file selection dropdown menu with a 'BROWSE' button.
- Four dropdown menus for address fields: 'AddressFull', 'Date', 'Checkouts (Optional)', and 'Email Address (Optional)'.
- A radio button at the bottom for 'Select this button if the address is in multiple fields ...'.

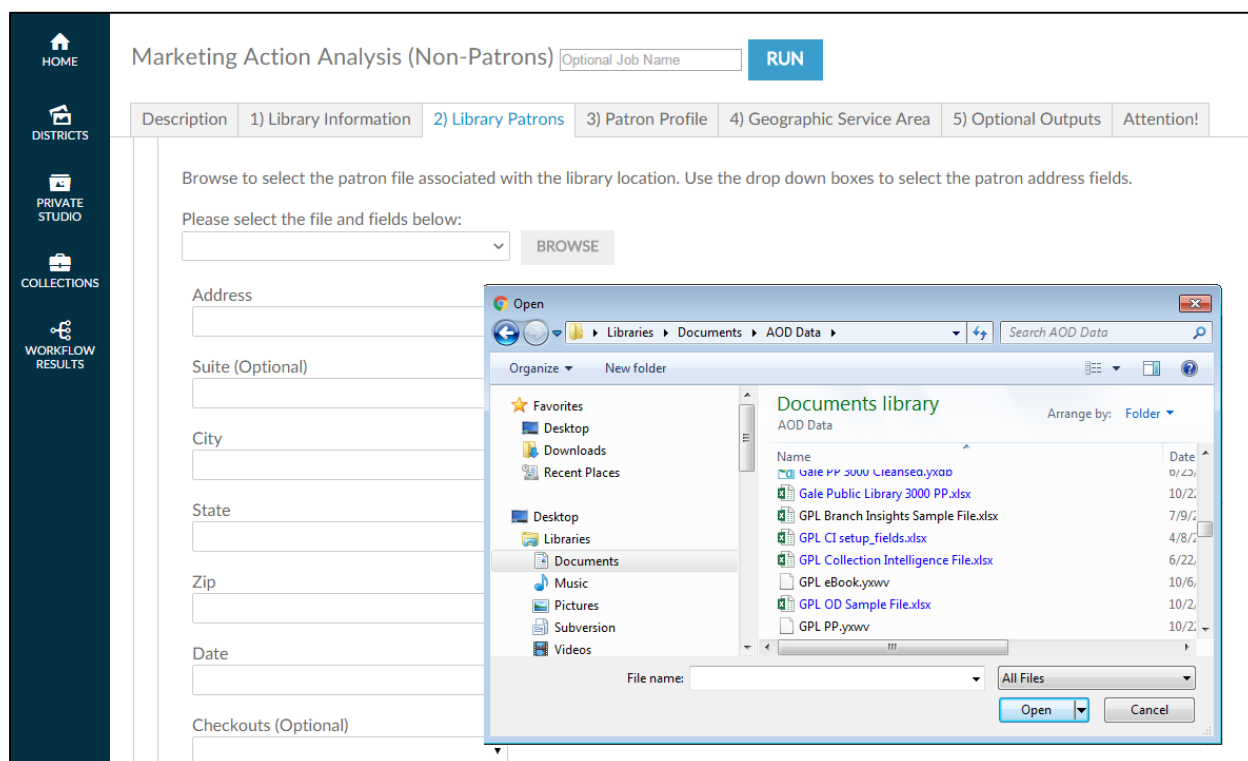
The following screen shows the multiple-column address view.

Once you select the address radio button for your input file, the next step is to click the **BROWSE** button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the workflow.

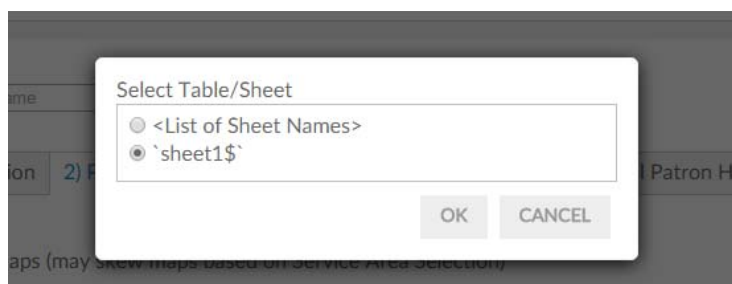
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, activity date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron address field.

Please select the file and fields below:

Gale Public Library 3000 PP.xl... sheet1\$

ADDRESS

Address #1
 Select a Field
 Street Number
 Street Name
 Street Suffix
 Address #1
 City
 State
 ZIP Code
 Address
 Circ Active
 TOT CHKOUT
 Barcode

S

S ...

Date Filter:

After aligning the fields to your input data file, you have the option to show patron household on the map that is created. Normally only non-patron households will be mapped but selecting this option will show both patrons and non-patrons in differing colors on the same map.

Map Option:

Show 'Patrons' on the map

Finally you may filter your existing patrons by their last active date. The default, as shown below, is all patrons, regardless of Last Active Date.

Date Filter:

Analyze all patrons, regardless of Last Active Date:

Filter by Last Active Date:

Set the date filters to only include patrons within activity between the FROM and TO dates.

FROM:

mm/dd/yyyy

TO:

mm/dd/yyyy

Since the mailing list of NON-PATRONS is arrived at by subtracting existing patrons from a total list of all household addresses, how you answer the activity date filter for your existing patrons input file will determine if any existing patrons would be included in the mailing list you create.

If you elect to exclude groups of existing patrons by their activity date (thereby including them in your NON-PATRON mailing list), click on the FILTER BY LAST ACTIVE DATE and the following window appears:

Date Filter:

Analyze all patrons, regardless of Last Active Date:

Filter by Last Active Date:

Set the date filters to only include patrons within activity between the FROM and TO dates.

FROM:

November 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Today: 11/20/2014

TO:

November 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Today: 11/20/2014

You can now select a beginning and ending date window of activity and the workflow will include any existing patron (in your NON-PATRON mailing list) that has a last active date that falls outside of this window.

Click on the next tab or scroll down the page in your browser to continue.

7.1.5 Marketing Action Analysis (Non-Patrons) – Patron Profile

Your next step is to select specific filters to narrow down the exact demographic profile of the non-patrons you want to reach.

Marketing Action Analysis (Non-Patrons)

RUN

Description
1) Library Information
2) Library Patrons
3) Patron Profile
4) Geographic Service Area
5) Optional Outputs
Attention!

3) Patron Profile

Use the drop down boxes to select each filter. The output report will provide a count of potential mail list candidates in each filter chosen. A hierarchy methodology is employed in generating the final counts. For example, first select the Mosaic cluster, then the demographics to filter this list further.

Optional Output:

Output "Unlock File" for use in Mailing List app

Build Patron Profile:

- Mosaic Group ...
- Household Income ...
- Children in Household ...
- Length of Residence ...
- Type of Dwelling ...

You will build your non-patron profile by selecting the demographic attributes. If you do not want to select a 'slice' or 'portion' of a demographic variable, simply do not click on the radio button next to it. All of that particular attribute will be included. On demographic attributes you do want to filter, click on the box next to the attribute to select each filter.

Build Patron Profile:

- Mosaic Group ...
- Household Income ...
- Children in Household ...
- Length of Residence ...
- Type of Dwelling ...

The output report will provide a count of potential mail list candidates in each filter chosen. A hierarchy methodology is employed in generating the final counts. For example, first select the Mosaic cluster, then the demographics to filter this list further. The following image demonstrates the selection of only one Mosaic cluster (American Royalty) which will NOT filter on household income, children in household or length of residence. In other words, the report will not exclude anyone based on their income, whether they have or not have children in the household, how long they have lived in their home or the type of dwelling they live in.

Build Patron Profile:

- Mosaic Group
 - Select the Mosaic group and cluster
 - Power Elite
 - American Royalty
 - Platinum Prosperity
 - Kids and Cabernet
 - Picture Perfect Families
 - Couples with Clout
 - Jet Set Urbanites
 - Flourishing Families
 - Booming with Confidence
 - Suburban Style
- Household Income ...
- Children in Household ...
- Length of Residence ...

Click on the next tab or scroll down the page in your browser to continue.

7.1.6 Marketing Action Analysis (Non-Patrons) – Geographic Service Area

Your last step is to identify the geographic area you want to analyze. Examples of geographies include

- the library's service area, b) surrounding geographies outside the service area (to analyze non-patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

Marketing Action Analysis (Non-Patrons)

Description | 1) Library Information | 2) Library Patrons | 3) Patron Profile | 4) Geographic Service Area | 5) Optional Outputs | Attention!

4) Geographic Service Area

Service Area:

Warning!

The size of your service area influences how long this app will take to complete. A very large service area (more than 5 miles in radius) could take more than 30 minutes to finish - especially in highly urbanized areas.

You may also receive an error if the total household count of your service area exceeds 250,000. You will be asked to select or upload a smaller service area.

Define your library's service area here

Select geographies that define the library service area. Click the (+) sign to expand the tree.

- Block Groups
- CCDs/MCDs by County
- Census Tracts
- Congressional Districts (114th)
- Counties
- Places
- ZIP Codes by County

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files. If you are loading a spatial file, click the **OR Upload your library's service area file (spatial formats only)** button and then click on **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

When the file appears in the file window, bypass the geography tree and move to the next filter, which appears after the geography tree.

If selecting a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the + **sign** to expand the list and continue until you locate the geography you want. If selecting from the geography tree, you may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculation may take hours.

Click on the next tab or scroll down the page in your browser to continue.

7.1.7 Marketing Action Analysis (Non-Patrons) – Optional Outputs

The next step in the process before running the report is to decide whether you want to include additional files or reports in the output.

The screenshot shows the 'Marketing Action Analysis (Non-Patrons)' interface. At the top, there is a 'RUN' button and an 'Optional Job Name' input field. Below this is a navigation bar with tabs: 'Description', '1) Library Information', '2) Library Patrons', '3) Patron Profile', '4) Geographic Service Area', '5) Optional Outputs', and 'Attention!'. The '5) Optional Outputs' tab is selected. The content area shows the heading '5) Optional Outputs' and the instruction 'Check to include any of these optional outputs:'. There are two checkboxes: one for 'Summary report of your patron data "health"' and one for 'Patron records with address or date issues'.

There are two optional outputs available.

- a) **Summary of your patron data “health”** – this will create a report outlining the number of records found in your patron file with the number of good/bad records found as well as the number of records found on Experian. It will also tell you the reasons for any bad data that was found.
- b) **Patron records with address or date issues** – this will create a downloadable file of all patron address records that were bad and the reason why they could not be processed.

Simply click the box to include the options you want or leave it blank if you elect not to.

7.1.8 Marketing Action Analysis (Non-Patrons) – Attention!

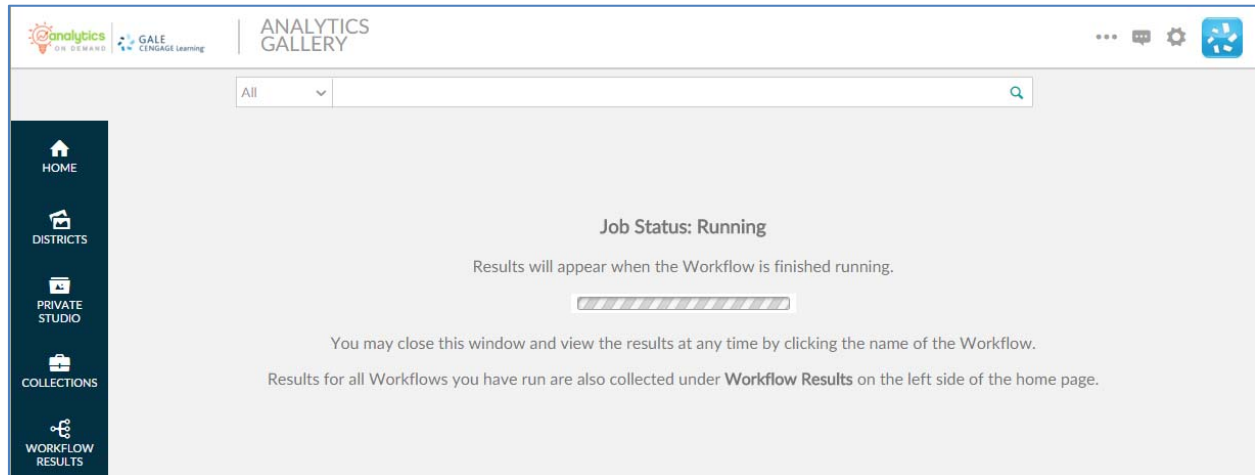
The final step in the process before running the simply requires you to be familiar with the type of outputs this particular workflow generates. There are no filters, uploads, or decisions that need to be made in this tab.

The screenshot shows the 'Marketing Action Analysis (Non-Patrons)' interface with the 'Attention!' tab selected. The navigation bar is the same as in the previous screenshot. The content area shows the heading 'Attention!' and the text 'Attention: This app produces multiple output files.' Below this, it states: 'After execution, you will only see a preview of one output file by default. To view additional outputs you can toggle between output files using the drop down menu next to the text "Output File:" and just below the name of the app in the app result window.' A final note says: 'You may also see a list of all outputs from this app by clicking on the "bulleted list" button in the top right corner of the app results window.'

Specifically, this tab explains that you will receive two outputs. One will be the brief report that includes a table to identify the households that fell in to each one of the filters (along with a map) and the second will be the .csv file you will need to upload in to the Marketing Action Mailing List (Non-Patrons) workflow to generate the actual list.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.

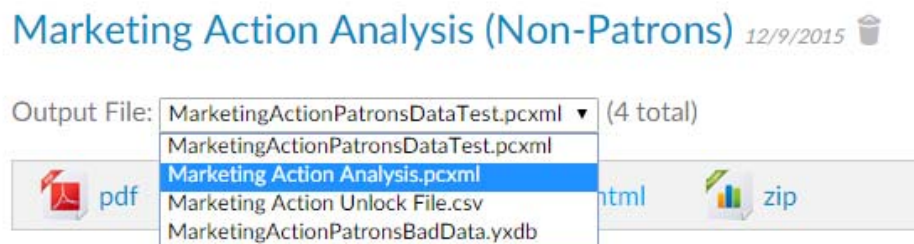


Please note that it is not necessary to wait until the analysis completes. By clicking the **COLLECTIONS** link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the **WORKFLOW RESULTS** link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

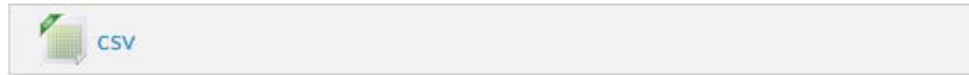
As shown below, once the analysis is complete you can switch from one output to the other by clicking on the drop down arrow at the top of the page to select between the two. The files created by your Optional Output settings will also appear here.



If you are satisfied with the count of households from the analysis, select the Marketing Action Unlock File.csv option and the screen will switch to that output, as shown below.

Marketing Action Analysis (Non-Patrons) 12/9/2015

Output File: (4 total)

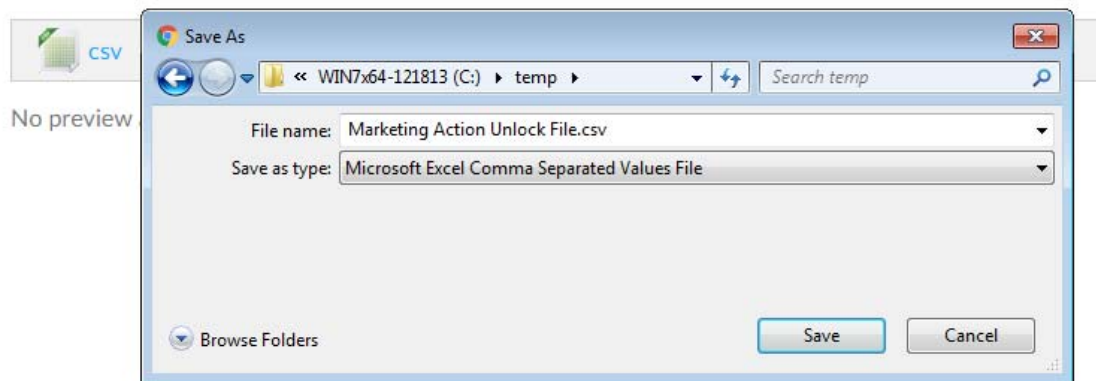


No preview available

Simply click on the csv icon and a box will appear to allow you to open it or save it to your hard drive.

Marketing Action Analysis (Non-Patrons) 12/9/2015

Output File: (4 total)



You can then find and select this file when running the Marketing Action Mailing List (Non-Patrons) workflow.

7.2 Marketing Action Mailing List (Non-Patrons)

This section provides a [detailed](#) description of the *Marketing Action Mailing List (Non-Patrons)* workflow.

There are two separate workflows included when you subscribe to the *Marketing Action (Non-Patrons)* workflow, the *Marketing Action Analysis* workflow and the *Marketing Action Mailing List (Non-Patrons)* workflow. The *Marketing Action Mailing List (Non-Patrons)* workflow is used to output the actual list of households created by the *Marketing Action Analysis* workflow.

This workflow will produce one output – the household mailing list of new patrons you are targeting.

7.2.1 Marketing Action Mailing List (Non-Patrons) – Initial Screen

The following screen appears when you click the *Marketing Action Mailing List (Non-Patrons)* workflow:

The screenshot shows the 'ANALYTICS GALLERY' interface. On the left is a navigation sidebar with icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area displays a workflow card for 'Marketing Action Mailing List (Non-Patrons) v8'. The card features a purple mailbox icon, the title, author 'Subscriber Apps - Gale Cengage Learning', and metadata: 'Latest: Version 1 - Uploaded 1 year ago', 'Published: Version 1 - Uploaded 1 year ago', and 'Run: 12 times'. A blue 'RUN' button is positioned below the metadata. A descriptive paragraph explains the workflow's purpose: 'This application can be used to obtain a list of household names and addresses that fit your library's demographic profile as defined in the Marketing Action Analysis app. This list can be used for a wide array of marketing initiatives to improve the patron engagement at your library.' Below this is a link to 'Analytics On Demand: User Guide', author 'Gale Cengage Learning', and copyright information. At the bottom, a table titled 'Previous results for this workflow' shows one entry: 'Marketing Action Mailing List (Non-Patrons)' with a date of '6 days ago' and a note 'Date - Results expire after 30 days'.

Name	Date - Results expire after 30 days
Marketing Action Mailing List (Non-Patrons)	6 days ago

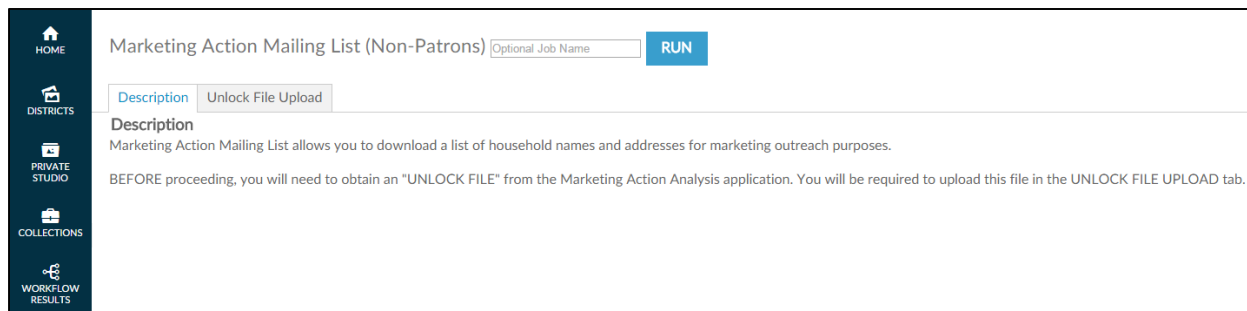
This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of what the Marketing Action Mailing List (Non-Patrons) workflow does:** “This workflow can be used to obtain a list of household names and addresses that fit your library's demographic profile as defined in the Marketing Action Analysis workflow. This list can be used for a wide array of marketing initiatives to improve the patron engagement at your library.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide.

- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

7.2.2 Marketing Action Mailing List (Non-Patrons) – Description

When you click **RUN**, the following screen appears. Note that the screen displays only two tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands.



This tab allows you to name an output report in the text box located in the upper left portion of the screen:

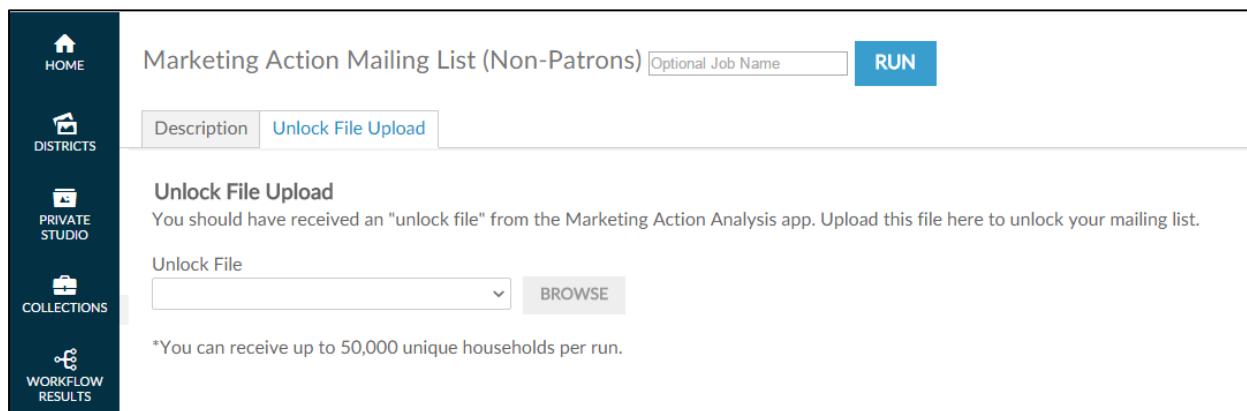
Marketing Action Mailing List (Non-Patrons)

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

7.2.3 Marketing Action Mailing List (Non-Patrons) – Unlock File Upload

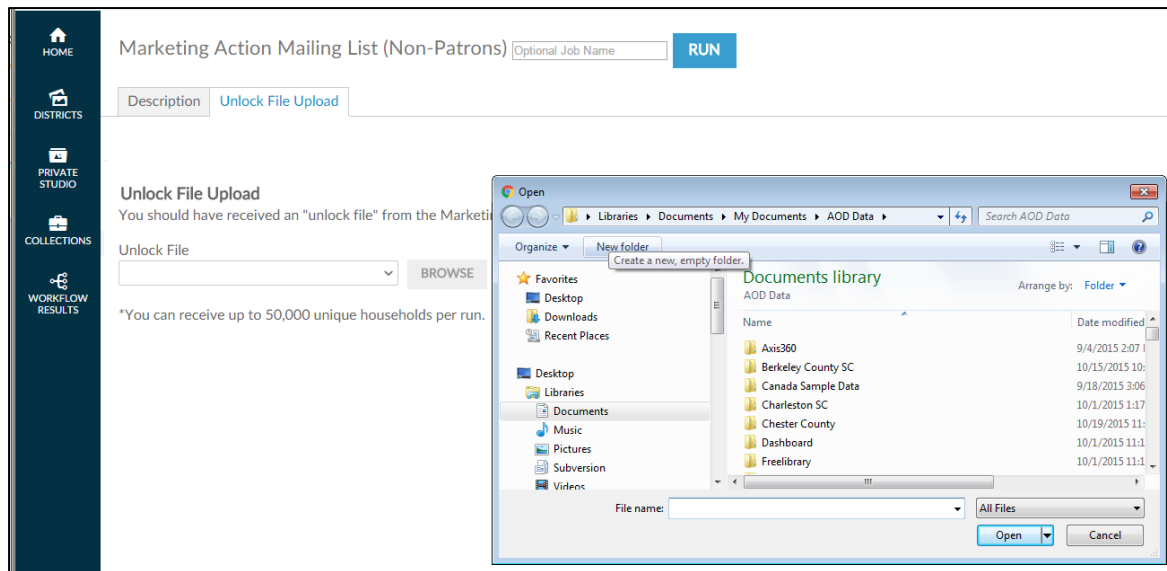
The **Unlock File Upload** tab is where you upload the .csv file you created in the Marketing Action Analysis (Non-Patrons) workflow.



Click the **BROWSE** button to browse for the .csv input file located on your hard drive and/or network drive for uploading. This process (of uploading) is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already ran the Marketing Action Analysis (Non-Patrons) workflow and saved the .csv input file before accessing this workflow.

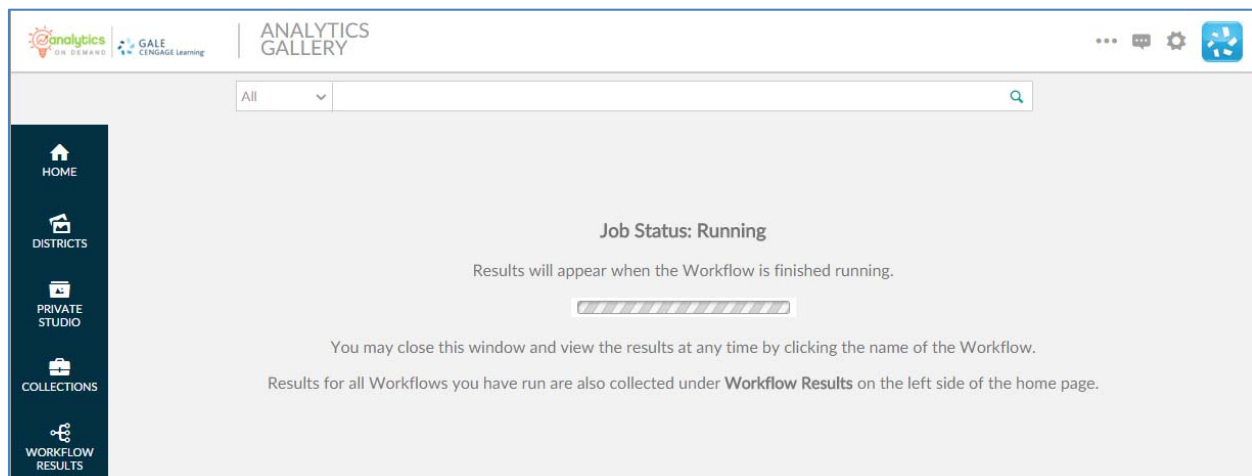
As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the .csv file you may immediately run the workflow.

Click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the COLLECTIONS link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the WORKFLOW RESULTS link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

The mailing list will appear on screen. Select the output you want to save the mailing to by clicking on the file types above the list.

Marketing Action Mailing List (Non-Patrons) 12/15/2015 RE-RUN

Output File: Mailing List.pcxml (1 total)

pdf docx xlsx html zip

Email Address	SURNAME	ADDRESS 1	ADDRESS 2	CITY	STATE	ZIP	ZIP4	Total Checkouts	Last Active Date
1234318	BAKKO	27850 BAYBERRY RD		FARMINGTON	MI	48331	3307	0	2006-04-20
2570354	AJUTO	27850 PEPPERMILL RD		FARMINGTON	MI	48331	3327	200	2012-06-06
1053251	BURKE	27880 PEPPERMILL RD		FARMINGTON	MI	48331	3327	12	2012-10-10
2770421	SCHATZLE	27882 GREEN WILLOW ST		FARMINGTON	MI	48331	5629	1729	2005-11-30
2493206	BABICS	27890 PEPPERMILL RD		FARMINGTON	MI	48331	3327	43	2012-07-12
2424535 1052290	MCCABE	27891 GREEN WILLOW ST		FARMINGTON	MI	48331	5631	2561	2013-11-04
1931009	SCHNEIDER	27904 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	184	2005-12-12
2496172	PEARSON	27925 GREEN WILLOW ST		FARMINGTON	MI	48331	5606	83	2004-04-02
2504062	KENNEDY	27942 BAYBERRY RD		FARMINGTON	MI	48331	3380	0	2011-02-15
2286792	ZACHARIA	27947 GREEN WILLOW ST		FARMINGTON	MI	48331	5606	128	2008-07-15
2509971 2779261	GABRIELIAN	27948 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	623	2013-12-26
2415360	GREEN	27960 BAYBERRY RD		FARMINGTON	MI	48331	3310	0	2010-09-26
2465700	BOLLIN	27970 GREEN WILLOW ST		FARMINGTON	MI	48331	5604	0	2013-10-23
1230921 2588769	LEMPICKI	27978 BAYBERRY RD		FARMINGTON	MI	48331	3310	0	2011-03-21

8.0 PATRON VOTER ANALYSIS

8.0 PATRON VOTER ANALYSIS

This section provides a detailed description of the *Patron Voter Analysis* workflow.

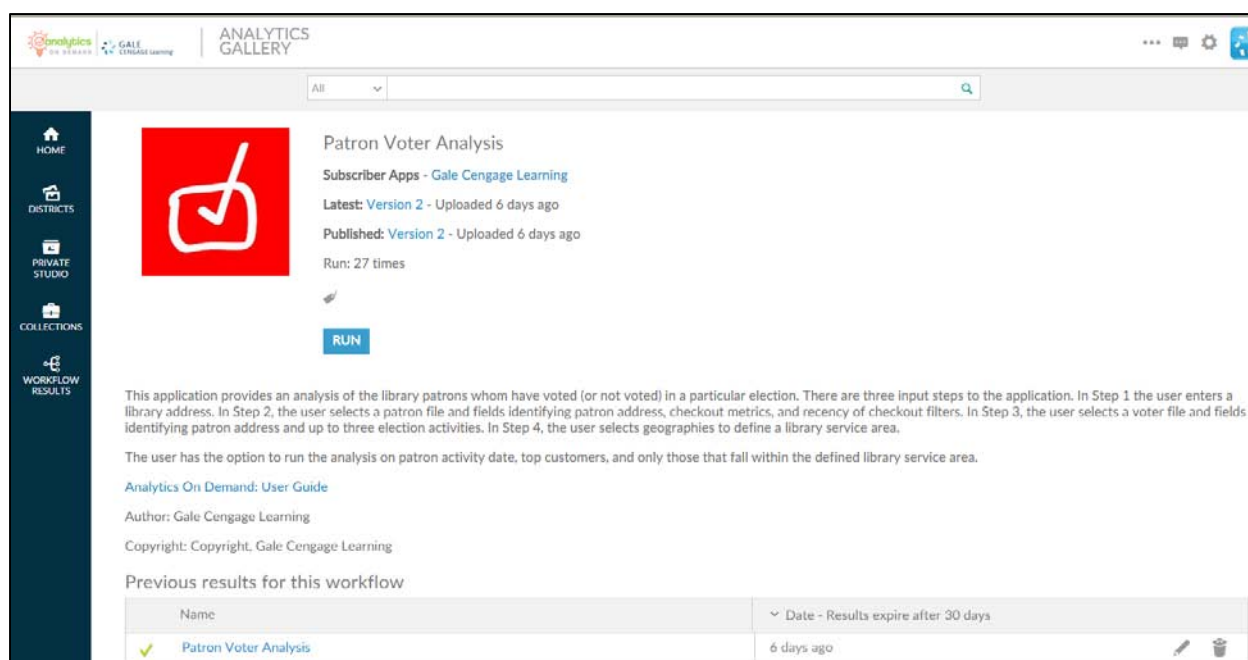
8.1 Patron Voter Analysis

This section provides a detailed description of the *Patron Voter Analysis* workflow. This workflow provides a list of existing patrons who have voted (or not voted) in previous elections in order for the library to provide outreach to encourage their patrons to get to the polls to support any ballot initiatives that concern their local library.

There are three input steps to the workflow. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3, the user selects a voter file and fields identifying patron address and up to three election activities. In Step 4, the user selects geographies to define a library service area.

8.1.1 Patron Voter Analysis – Initial Screen

The following screen appears when you click the *Patron Voter analysis* workflow:



The screenshot shows the Analytics Gallery interface. On the left is a dark sidebar with navigation options: HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area displays a workflow card for 'Patron Voter Analysis'. The card features a red square icon with a white checkmark and a pencil. Text on the card includes: 'Subscriber Apps - Gale Cengage Learning', 'Latest: Version 2 - Uploaded 6 days ago', 'Published: Version 2 - Uploaded 6 days ago', and 'Run: 27 times'. A blue 'RUN' button is visible. Below the card, there is a descriptive paragraph about the application's purpose and input steps, followed by metadata: 'Analytics On Demand: User Guide', 'Author: Gale Cengage Learning', and 'Copyright: Copyright, Gale Cengage Learning'. At the bottom, a table titled 'Previous results for this workflow' shows one entry: 'Patron Voter Analysis' with a status of '6 days ago' and a note 'Date - Results expire after 30 days'.

This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.

- **A summary description of the workflow** – “This workflow provides an analysis of the library patrons whom have voted (or not voted) in a particular election. There are three input steps to the workflow. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3, the user selects a voter file and fields identifying patron address and up to three election activities. In Step 4, the user selects geographies to define a library service area. The user has the option to run the analysis on patron activity date, top customers, and only those that fall within the defined library service area.”
- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

8.1.2 Patron Voter Analysis – Description

When you click **RUN**, the following screen appears. Note that the screen displays six tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands

Patron Voter Analysis **RUN**

Description | 1) Library Information | 2) Patron File | 3) Voter File | 4) Geographic Service Area | 5) Optional Outputs

Description

The Voter Registration report will allow you to blend your voting data with patron data and analyze in several different ways - by geography, by last active date, by frequency of checkouts: BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the PATRON FILE tab.

1) LIBRARY INFORMATION:

- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.

2) PATRON FILE

- Upload a patron file that you previously saved to your hard drive. This file **MUST** have **THREE** pieces of information: patron address, total number of checkouts, and the date they were last active.
- Select the active date of the patron group you want to analyze. You can elect to analyze all of your patrons or only those that have been active within a specific time frame (6 months, 12 months, 18 months, etc.).
- You may elect to analyze only your 'top customers' by selecting a percentage of patrons to analyze. This option will only analyze the customers that have borrowed the most materials in the time period specified.

3) VOTER FILE

- Upload a voter file that you previously saved to your hard drive. This file **MUST** have **THREE** pieces of information: address, last name, and at least one election field.
- You may elect to analyze voting patrons based on voting history. You may select patrons whom have voted in the last One of One, One of Two, or One of Three elections.

4) GEOGRAPHIC SERVICE AREA

- Select the geography of your library's service area. You may also select a custom geography created by DemographicsNow or any other accepted spatial format (YXDB, SHP, TAB, KML). You may also select from a list of pre-defined geographies. This can be by county, zip code, city, block group, census tracts or any other defined geography.
- Additionally, select the radio button that determines whether you only want to analyze all patrons regardless of the geographic area, only those patrons within the service area, or only those patrons outside of the service area.

This tab allows you to name an output report in the text box located in the top left portion of the screen:

Patron Voter Analysis

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

8.1.3 Patron Voter Analysis – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library’s location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library
- To choose whether or not to display the library location on any maps views when it is outside of the selected Service Area

The screenshot displays the 'Patron Voter Analysis' web application. On the left is a dark blue sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area has a header with 'Patron Voter Analysis', an 'Optional Job Name' input field, and a blue 'RUN' button. Below the header is a tabbed interface with five tabs: 'Description', '1) Library Information' (selected), '2) Patron File', '3) Voter File', '4) Geographic Service Area', and '5) Optional Outputs'. The '1) Library Information' tab contains a section titled 'Enter library information:' with the following fields: 'Library Name' (text input), 'Address' (text input), 'City' (text input), 'State' (dropdown menu with 'AL' selected), and '5-digit zip code' (text input). Below these fields is a 'Map Options:' section with a checkbox labeled 'Force Library Location on Maps (may skew maps based on Service Area)'.

Click on the next tab or scroll down the page in your browser to continue.

8.1.4 Patron Voter Analysis – Patron File

Use the **Patron File** tab to upload a data file—normally an Excel—file from your ILS. This file requires three specific pieces of information: patron address, total checkouts, and a patron’s last active date.

You have flexibility in the type of data to include. For example, for total checkouts, your file could include total checkouts over the life of the library card or some subset filtered by ILS extraction. Perhaps the ILS extract includes only six months or a year of checkouts. For last active date—if the ILS allows it—you may want to include only the last activity date for physical checkouts, the last activity date for computer use, or any other date tracked in in the ILS. This allows filtering not only by the *Patron Voter Analysis* workflow (more on this to follow) but also on the ILS extract date you used to create the AOD input file.

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you select. (The single-column address view is the default.)

This screen shows the single-column address view.

The screenshot displays the 'Patron Voter Analysis' web interface. On the left is a dark blue sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area has a header with 'Patron Voter Analysis' and an 'Optional Job Name' input field, followed by a blue 'RUN' button. Below the header is a tabbed interface with five tabs: 'Description', '1) Library Information', '2) Patron File' (which is active), '3) Voter File', '4) Geographic Service Area', and '5) Optional Outputs'. Under the '2) Patron File' tab, the instruction reads 'Select patron file and fields denoting checkout metrics:'. There are two radio buttons: the first is selected and labeled 'Select this button if the address is in a single field', and the second is labeled 'Select this button if the address is in multiple fields ...'. Below the first radio button, there is a text prompt: 'Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron name, address, total checkouts, and last active date fields.' This is followed by a 'Please select file and fields' section with a dropdown menu and a 'BROWSE' button. Below this are five more dropdown menus labeled 'AddressFull', 'Date', 'Checkouts (Optional)', and 'Email (Optional)'. The second radio button is currently unselected.

The following screen shows the multiple-column address view.

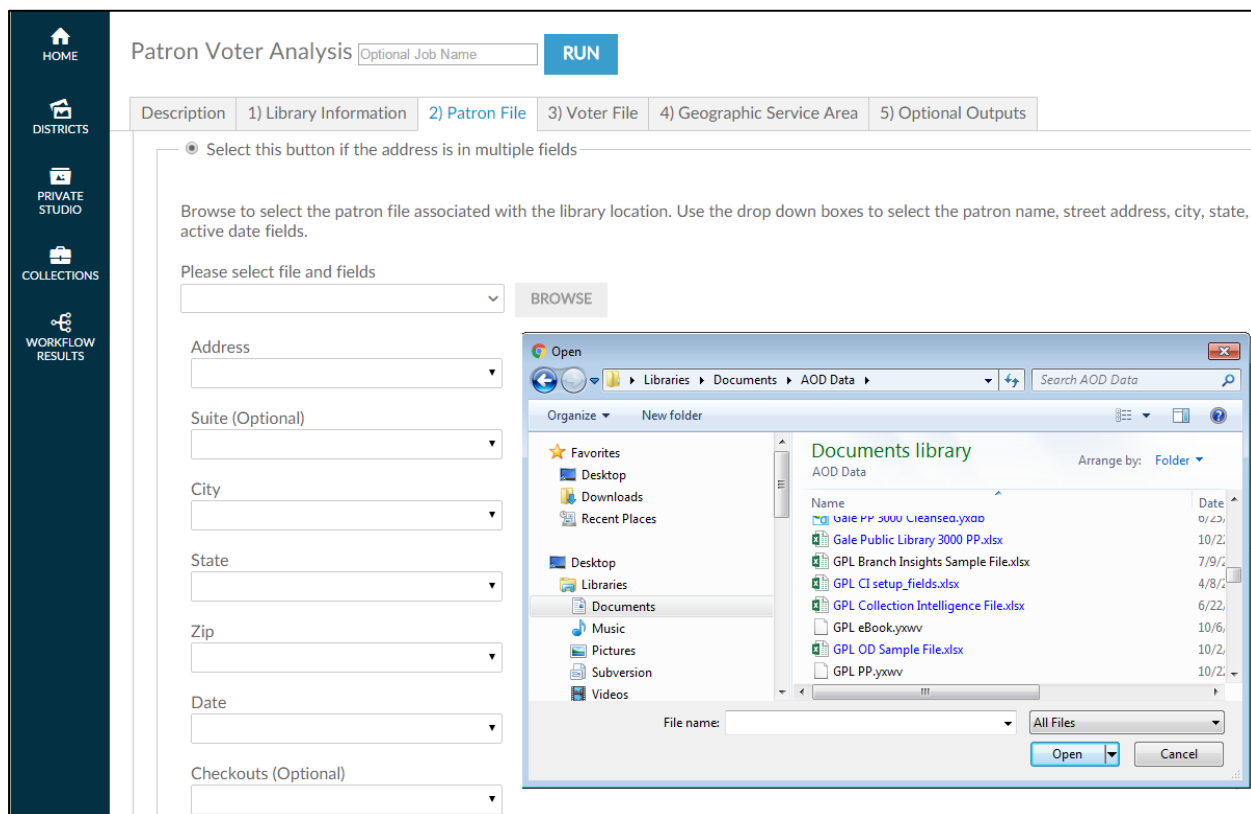
The screenshot shows a web application interface for 'Patron Voter Analysis'. On the left is a dark blue sidebar with navigation icons for HOME, DISTRICTS, PRIVATE STUDIO, COLLECTIONS, and WORKFLOW RESULTS. The main content area has a title 'Patron Voter Analysis' with an 'Optional Job Name' input field and a 'RUN' button. Below the title is a progress bar with five steps: 'Description', '1) Library Information', '2) Patron File', '3) Voter File', '4) Geographic Service Area', and '5) Optional Outputs'. The '2) Patron File' step is active. A radio button is selected with the text 'Select this button if the address is in multiple fields'. Below this is a text instruction: 'Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron name, street address, city, state, zip, total checkouts, and last active date fields.' The form contains several dropdown menus: 'Please select file and fields' (with a 'BROWSE' button), 'Address', 'Suite (Optional)', 'City', 'State', 'Zip', 'Date', 'Checkouts (Optional)', and 'Email (Optional)'.

Once you select the address radio button, the next step is to click the **BROWSE** button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You **must** have already extracted your input file from your ILS before accessing the workflow.

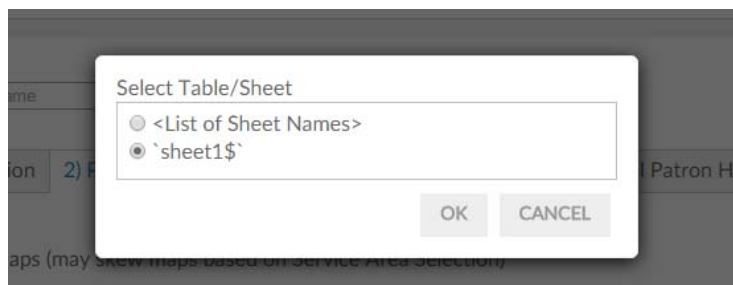
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



Once you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields to the names on each of the fields identified in this tab (checkouts, address, active date, and email). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data. If not, click the drop-down list **Please select file and fields** to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

Please select file and fields

Gale Public Library 3000 PP.xl...[sheet1\$] Browse

TOTAL CHECKOUTS
Select a Field

ADDRESS
Address

- Select a Field
- Street Number
- Street Name
- Street Suffix
- City
- State
- ZIP Code
- Address
- Circ Active
- TOT CHKOUT
- Barcode

After you upload your patron file, scroll down the screen and you may choose two filters a) patron activity date, or b) percentage of top patrons

As noted, the first filter is **patron activity date**. Click the icon for a drop-down menu of choices. The default is the All Patrons.

Additional Filters:

Activity Date:

Click the drop down box to make a selection.

- All Patrons
- Active Last 6 Months
- Inactive Last 6 Months
- Active Last 12 Months
- Inactive Last 12 Months
- Active Last 18 Months
- Inactive Last 18 Months
- Active Last 24 Months
- Inactive Last 24 Months
- Active Last 30 Months
- Inactive Last 30 Months
- Active Last 36 Months
- Inactive Last 36 Months
- All Patrons

Prev

This means that all patrons, regardless of activity on their library card, are included in the **Patron Voter Analysis**. To change this selection, select the option you prefer. Note that this filter is keyed to the date field in the **Patron File** tab.

Note: You can define the extract activity date column differently. That is, you can choose a date from cardholder inception or a period of time defined by the ILS extraction when creating the input file. The most common choice is the last date of patron activity, with no filter applied when extracting the file from the ILS.

The next filter, **Checkout Ranking**, allows you to select a percentage of your heaviest (or least heaviest) users, as measured by **Total Checkouts** column data in the user input file.

Checkout Ranking:

Top

% of Patrons:

100

*100 = All Patrons

By clicking the arrows to the right of the box, you can choose to analyze a percentage of your very best (or your low usage) “customers.” This could be the top five (5) percent of users, as measured by a highest-to-lowest ranking of checkouts. This selection is best used after first analyzing all patrons and then doing selective analysis on smaller groups of patrons. You may, for example, want to do a percentage ranking of usage by patrons from a smaller geography or by patrons who live outside the service area.


After aligning the necessary fields, click on the next tab or scroll down the page in your browser to continue.

8.1.5 Patron Voter Analysis – Voter File

Use the **Voter File** tab to upload a data file—normally an Excel—file from local government office that includes citizen voting records. This file requires three specific pieces of information: last name, address, and each citizen's voting record in past elections, listed in separate columns in the spreadsheet.

The following screenshots show data for an input file that includes a patron address. Depending on your input file, a citizen's address may be extracted and placed in multiple columns—multiple columns for street address, one for city, one for state, and one for ZIP code. If the street number, street and street suffix are in separate columns, you **MUST** combine these columns using the **Combine Columns** free workflow in AOD. The view presented depends on the radio button you select. (The single-column address view is the default.)

This screen shows the single-column address view. The multiple address view is similar to the Patron File where the address is contained within multiple fields.


HOME

Patron Voter Analysis

RUN

Description

1) Library Information

2) Patron File

3) Voter File

4) Geographic Service Area

5) Optional Outputs

3) Voter File

Select voter file and fields denoting voting metrics:

Select this button if the address is in a single field

Please select file and fields

BROWSE

Last Name (Optional)

AddressFull

Election 1

Election 2 (Optional)

Election 3 (Optional)

Select this button if the address is in multiple fields ...

Voting Data Format:

Specify the format of your designated ELECTION fields below.

Populated values = 'Voted' and Unpopulated values = 'Did Not Vote'

A value of 'Yes', 'True', or '1' = 'Voted' and a value of 'No', 'False', '0', or unpopulated values = 'Did Not Vote'

Voting Filter:

Patron must have voted in the selected election(s). Choose any combination below.

Voted in ALL selected elections

Voted in ANY selected election

Election 1

Election 2

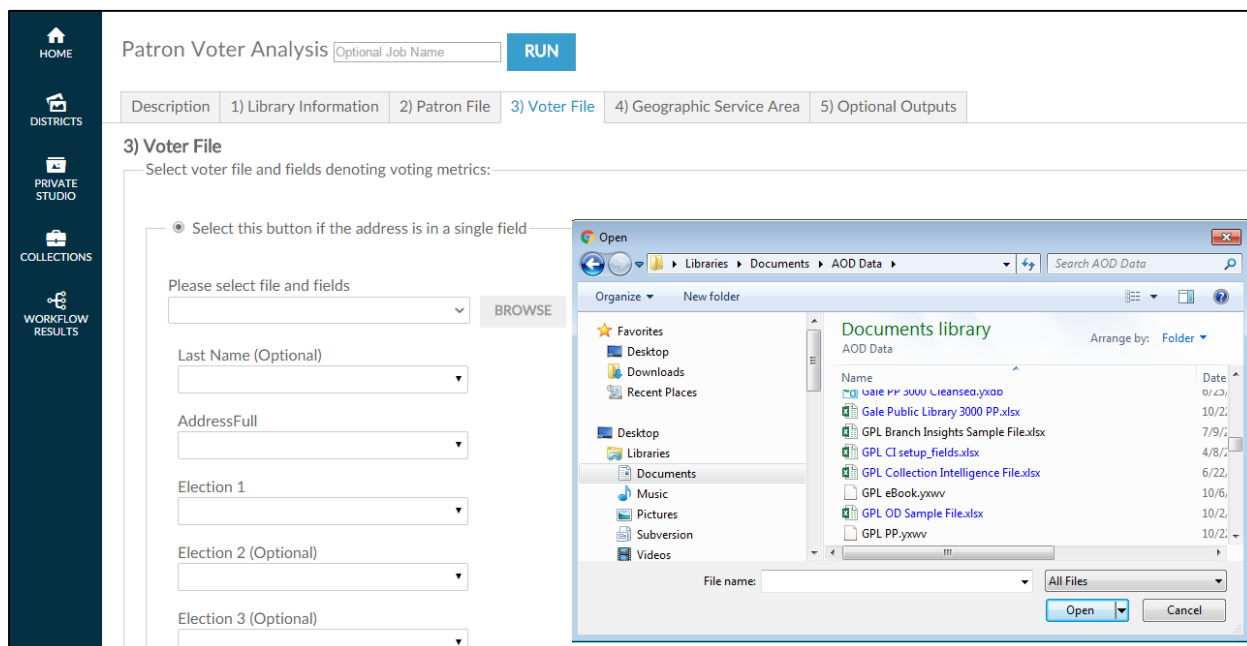
Election 3

Once you select the address radio button, the next step is to click the **BROWSE** button to browse your directory for the voter file located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You **must** have already received your input file from your local government office before accessing the workflow.

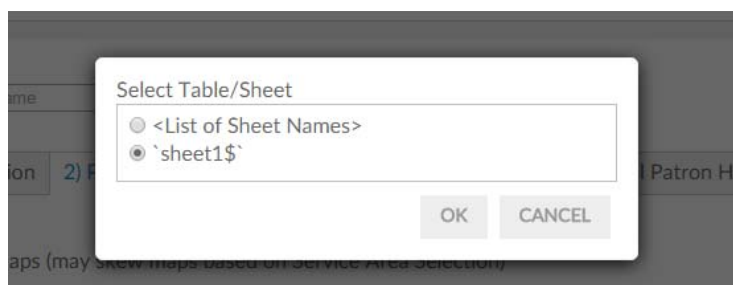
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking **OK**.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



Once you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields to the names on each of the fields identified in this tab (address, and elections). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column.

Verify that the workflow has selected the correct columns of data. If not, click the drop-down list **Please select file and fields** to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

After you upload your voter file, scroll down the screen and you may specify the format of the election datafields.

Voting Data Format:

Specify the format of your designated ELECTION fields below.

Populated values = 'Voted' and Unpopulated values = 'Did Not Vote'

A value of 'Yes', 'True', or '1' = 'Voted' and a value of 'No', 'False', '0', or unpopulated values = 'Did Not Vote'

There are two options:

- Populated values** – this means that if there is any data in the field then it should be interpreted as the patron DID vote. If the field is empty then it is assumed the patron DID NOT vote.
- A value of ...** - If the value 'Yes', 'True', or '1' then it is interpreted as the patron DID vote. If there is any other value or the field is empty then it is assumed the patron DID NOT vote.

Next you prompted to select if you want to report on ALL elections or ANY election and which elections to include in the analysis.

Voting Filter:

Patron must have voted in the selected election(s). Choose any combination below.

Voted in ALL selected elections

Voted in ANY selected election

Election 1

Election 2

Election 3

- Voted in ALL selected elections** – will include all patrons who voted in ALL the elections that you check off below (i.e. Election 1, Election 2, Election 3). For example, if you select this option and then check off Election 1 and Election 3 the patron must have voted in both Election 1 and Election 3 to be included.
- Voted in ANY selected elections** – will include all patrons who voted in ANY of the elections that you check off below (i.e. Election 1, Election 2, Election 3). For example, if you select this option and then check off Election 2 and Election 3 the patron must have voted in either Election 1 or Election 3 to be included.

Click on the next tab or scroll down the page in your browser to continue.

8.1.6 Patron Voter Analysis – Geographic Service Area

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files. If you are loading a spatial file, click the OR Upload your library's service area file (spatial formats only) button and then click on **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

After you select a geography, scroll down the screen and choose the final filter: whether to include or exclude patrons outside the geography selected.

Note: If you are interested in a county, do not select all its block groups. AOD calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

After you select a geography, scroll down the screen to the final filter: whether to include or exclude patrons outside the geography selected.

Finally, the **location filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Analyze only those patrons that fall WITHIN your service area (defined above)** includes patrons only if their addresses lie within the service area geography you defined earlier. Clicking **Analyze only those patrons that fall OUTSIDE OF your service area (defined above)** includes patrons only if their addresses lie outside the service area geography you defined earlier.

Location Filter:

Analyze all patrons, regardless of their location.

Analyze only those patrons that fall WITHIN your service area (defined above).

Analyze only those patrons that fall OUTSIDE OF your service area (defined above).

8.1.7 Patron Voter Analysis – Optional Outputs

The final step in the process before running the report is to decide whether you want to include additional files or reports in the output.

The screenshot shows the 'Patron Voter Analysis' interface. At the top, there is a 'RUN' button and an 'Optional Job Name' input field. Below this is a navigation bar with tabs: 'Description', '1) Library Information', '2) Patron File', '3) Voter File', '4) Geographic Service Area', and '5) Optional Outputs'. The '5) Optional Outputs' tab is selected. Under this tab, the text reads 'Check to include any of these optional outputs:'. There are three checkboxes: 'Summary report of your voter data "health"', 'Voter records that successfully matched to patron records.', and 'Voter records with address issues.' All three checkboxes are currently unchecked.

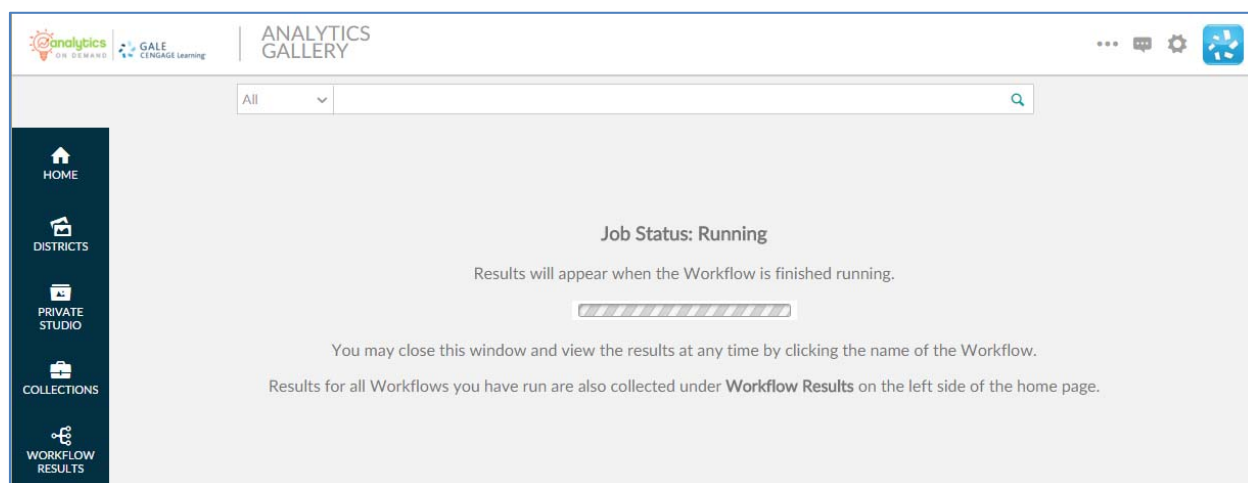
There are two optional outputs available.

- a) **Summary of your patron data “health”** – this will create a report outlining the number of records found in your patron file with the number of good/bad records found as well as the number of records found on Experian. It will also tell you the reasons for any bad data that was found.
- b) **Voter records that successfully matched patron record** – this will create a downloadable file of all voter records that matched the filter criteria specified on the Voter File tab.
- c) **Voter records with address or date issues** – this will create a downloadable file of all voter address records that were bad and the reason why they could not be processed.

Simply click the box to include the options you want or leave it blank if you elect not to.

After selecting the **patron filter**, click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the **COLLECTIONS** link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the **WORKFLOW RESULTS** link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.

9.0 BRANCH INSIGHTS

9.0 BRANCH INSIGHTS

This section provides a detailed description of the *Branch Insights* workflow.

9.1 Branch Insights

This section provides a detailed description of the *Branch Insights* workflow. This workflow provides a list of existing patrons who have voted (or not voted) in previous elections in order for the library to provide outreach to encourage their patrons to get to the polls to support any ballot initiatives that concern their local library.

There are three input steps to the workflow. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3, the user selects a voter file and fields identifying patron address and up to three election activities. In Step 4, the user selects geographies to define a library service area.

9.1.1 Branch Insights – Initial Screen

The following screen appears when you click the *Branch Insights* workflow:

Branch Insights tracks cardholders' use across various branches in a single library system. It provides insight into where and how individual consumer types are engaging the library system, so libraries can tailor the materials, programs, services and outreach at the branch-level.

In Step 1, the user selects a collection file and fields identifying patron address, branch location code and optional field for activity date.

In Step 2, the user selects a branch name file and fields for address and branch location codes.

In Step 3, the user enters a name to identify the report and if they were not included in the patron file the user can enter in the date range for which this report applies. The user also has the choice of running summary and/or detail level reports.

In Step 4, the user selects from a pre-defined geography tree or can upload their own service area definition file. The user can also choose to analyze all patrons and branches or limit the analysis to the selected geography.

Summary reports are created inclusive of all branches and separate reports are created for each branch location based on the users selections.

Analytics On Demand: User Guide
 Author: Gale Cengage Learning
 Copyright: Copyright, Gale Cengage Learning

Previous results for this workflow

Name	Date - Results expire after 30 days
✓ Branch Insights	Thursday at 10:34:26 AM

This screen provides the following key information:

- **Version number** – When the workflow is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of the workflow** – “Branch Insights tracks cardholders’ use across various branches in a single library system. It provides insight into where and how individual consumer types are engaging the library system, so libraries can tailor the materials, programs, services and outreach at the branch-level.

In Step 1, the user selects a collection file and fields identifying patron address, branch location code and optional field for activity date.

In Step 2, the user selects a branch name file and fields for address and branch location codes.


In Step 3, the user enters a name to identify the report and if they were not included in the patron file the user can enter in the date range for which this report applies. The user also has the choice of running summary and/or detail level reports.

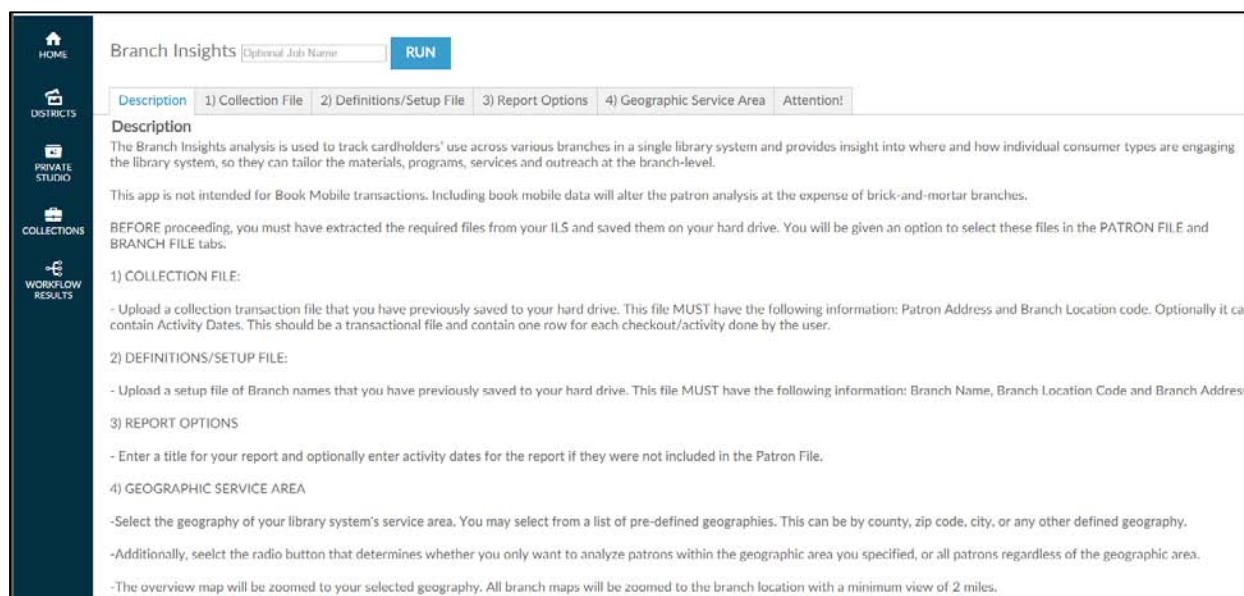
In Step 4, the user selects from a pre-defined geography tree or can upload their own service area definition file. The user can also choose to analyze all patrons and branches or limit the analysis to the selected geography.

Summary reports are created inclusive of all branches and separate reports are created for each branch location based on the user’s selections.

- **Link to Analytics On Demand User Guide** – clicking on this link takes you directly to the AOD user guide
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

9.1.2 Branch Insights – Description

When you click , the following screen appears. Note that the screen displays six tabs. (Some workflows may have more or fewer tabs.) The **Description** tab explains what is required to run the workflow, including a high-level overview of the commands



This tab allows you to name an output report in the text box located in the top left portion of the screen:

Branch Insights

By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click on the tab at the top of the page or scroll down the page in your browser window. Similarly, to go back to a prior tab click on it or scroll back in your browser window.

9.1.3 Branch Insights – Collection File

The **Collection File** tab provides the capability for you to upload a data file—typically an Excel file—from your ILS. This file requires two pieces of required information and one optional field: a) address, b) location code, which is usually a code that identifies the borrowing library branch and c) the activity date of the patron (an optional field).

The following screenshot displays an input file that includes patron address in one column. Depending on your ILS, the patron address may be extracted and placed in multiple columns—one/two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.

Note that once you upload the collection file, you will need to also identify whether the location code is a standalone field (a full location code) or whether it is part of code that identifies several different types of information (e.g. location and subject). The radio button defaults to a single code, however if your location code is the prefix of a much longer code identifier, select the **PARTIAL LOCATION_CODE** radio button and then select the number of characters that identify the location, as shown below:

Click on the next tab or scroll down the page in your browser to continue.

9.1.4 Branch Insights – Definitions/Setup File

Use the **Definitions/Setup File** tab to upload a manually created file—normally an Excel—that you created to identify all of your individual branch locations. This file requires two specific pieces of information: individual branch address (single or multi-column), and the location code that identifies that specific branch. All library branches must be identified in this file, else the workflow will simply drop a branch that is not identified in this file. The input screen is shown below.

The screenshot shows the 'Branch Insights' interface. At the top, there is a 'Branch Insights' header with an 'Optional Job Name' input field and a 'RUN' button. Below this is a navigation bar with tabs: 'Description', '1) Collection File', '2) Definitions/Setup File' (which is active), '3) Report Options', '4) Geographic Service Area', and 'Attention!'. The main content area is titled '2) Definitions/Setup File' and contains a 'Note' section with the text: 'Please include ALL branch locations in your setup file. Also, do not include Book Mobiles in your setup file. Missing branches and Book Mobiles will alter the patron analysis to the detriment of other branches.' Below the note is a section titled 'Select Definitions/Setup file and fields:'. It features a radio button selected for 'Select this button if the address is in a single field'. Underneath, there is a 'Please select file and fields' section with a dropdown menu and a 'BROWSE' button. Below this are four more dropdown menus labeled 'Location Code', 'Branch Name', and 'AddressFull'. At the bottom, there is another radio button option: 'Select this button if the address is in multiple fields ...'.

After you have selected the address radio button (that identifies whether your branch address is in one column or multiple columns), the next step is to click the **BROWSE** button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You **must** have already defined your input file before accessing the workflow.

It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the workflow from running properly. If any problems occur during running the workflow, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.

Branch Insights

Description | 1) Collection File | 2) Definitions/Setup File | 3) Report Options | 4) Geographic Service Area | Attention!

2) Definitions/Setup File

Note:

Please include ALL branch locations in your setup file. Also, do not include Book Mobiles in your setup file. Missing branches and Book Mobiles will alter the patron analysis to the detriment of other branches.

Select Definitions/Setup file and fields:

Select this button if the address is in a single field

Please select file and fields

Location Code

Branch Name

AddressFull

Select this button if the address is in multiple fields ...

Open

Libraries > Documents > AOD Data

Search AOD Data

Organize New folder

Documents library

AOD Data

Name	Date
state pp.xlsx	9/23
Gale Public Library 3000 PP.xlsx	10/2
GPL Branch Insights Sample File.xlsx	7/9/2
GPL CI setup_fields.xlsx	4/8/2
GPL Collection Intelligence File.xlsx	6/22
GPL eBook.yxwv	10/6
GPL OD Sample File.xlsx	10/2
GPL PP.yxwv	10/2

File name: All Files

After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking .

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.

Once you have confirmed the selection, AOD loads the file into the workflow and attempts to match the columnar fields to the names on each of the fields identified in this tab (location code, branch name and address field(s)). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the workflow has selected the correct columns of data. If not, click the drop-down list **Please select file and fields** to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

After you upload your definition/setup file, scroll down the screen to select the format of the location code in your branch definition/setup file,

Note that once you upload the definition/setup file, you will also need to also identify whether the location code is a standalone field (a full location code) or whether it is part of code that identifies several different types of information (e.g. location and subject) – similar to what you did when you loaded the collection file. The radio button defaults to a single code, however if your location code is the prefix of a much longer code identifier, select the PARTIAL LOCATION_CODE radio button and then select the number of characters that identify the location, as shown below:

Use the full or partial LOCATION_CODE field in Collection file to designate Branch location

Use Full LOCATION_CODE
 Use Partial LOCATION_CODE

Select the number of characters from the beginning of the LOCATION_CODE field that designate the Location (Default is 2)

2

Click on the next tab or scroll down the page in your browser to continue.

9.1.5 Branch Insights – Report Options

Use the **Report Options** tab to identify whether you want to run a system overview report, a branch detail report, or both, by selecting the radio buttons affiliated with each selection.

HOME

DISTRICTS

PRIVATE STUDIO

COLLECTIONS

WORKFLOW RESULTS

Branch Insights RUN

Description
1) Collection File
2) Definitions/Setup File
3) Report Options
4) Geographic Service Area
Attention!

3) Report Options

Enter a Report Title:

Report Outputs:

System Overview Report (8 pages total)

Branch Detail Report (4 pages per branch)

Activity Dates:

File Contains Activity Dates

Enter Activity Dates for Report ...

Summary report of your patron and branch data "health".

Patron records with address or date issues.

Patron records that failed to match to Experian households.

Patron records not matched to Branch file

You must also select a radio button to tell the workflow whether your collection input file includes activity dates (recall this was an optional field) or not. If the activity date is NOT in the collection input file then you MUST input the range of dates by clicking on ENTER ACTIVITY DATES FOR REPORT:

Activity Dates:

File Contains Activity Dates

Enter Activity Dates for Report

Enter FROM Date - MM/DD/YYYY to display on reports

Enter TO Date - MM/DD/YYYY to display on reports

The final options allow you to select any additional output you would like to see about the Patron and Branch data you have provided. We perform a thorough data cleansing and validation process at the beginning of each report and these options will help you identify where your data may need some additional work to produce better results.

- Summary report of your patron and branch data "health".
- Patron records with address or date issues.
- Patron records that failed to match to Experian households.
- Patron records not matched to Branch file

There are four optional outputs available.

- a) **Summary of your patron and branch data data "health"** – this will create a report outlining the number of records found in your patron and branch files with the number of good/bad records found as well as the number of records found on Experian. It will also tell you the reasons for any bad data that was found.
- b) **Patron records with address or date issues** – this will create a downloadable file of all patron address records that were bad and the reason why they could not be processed.
- c) **Patron records that failed to match to Experian households** – this will create a downloadable file of the patron addresses that could not be found on the Experian household file.
- d) **Patron records not matched to Branch file** – this will create a downloadable file of the patron records that specify a branch location that was not included in the branch file.

Note: There are several reasons for Experian not having a match for a specific household. Among other things a consumer needs to be active at an address for some amount of time before Experian can profile them. The household might could be vacant or for sale. Excluding the Suite number in areas of high rise

and multiple dwelling units lowers your match rate. And finally, the Experian data is updated quarterly so it may take time to work itself through the system.

After completing this step, click on the next tab or scroll down the page in your browser to continue.

9.1.6 Branch Insights – Geographic Service Area

Your final step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

Branch Insights

Description | 1) Collection File | 2) Definitions/Setup File | 3) Report Options | 4) Geographic Service Area | Attention!

4) Geographic Service Area

Service Area

Warning!

*Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This app also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files.

Define your library system service area here

Select geographies that define the system service area. Click the (+) sign to expand the tree:

- Block Groups
- CCDs/MCDs by County
- Census Tracts
- Congressional Districts (114th)
- Counties
- DMA by State
- Metro CBSAs by State
- Places
- States
- ZIP Codes by County

Upload your library system service area file (spatial formats only) ...

Location Filter:

- Analyze all patrons and branches, regardless of their location. (maps will still be zoomed to system geography)
- Analyze only those patrons and branches that fall WITHIN your service area (defined above).

You can select geographies from the geography tree menu or upload a custom geography (GIS) spatial file. Spatial files from either MapInfo or ESRI must be packaged within a zipped folder before uploading. This workflow also accepts Alteryx (YXDB) and Google Earth (KML) format spatial files.. If you are loading a spatial file, click the **BROWSE** button and locate the **spatial file** in the directory you previously saved it and select it. When the file appears in the file window, move to the next filtering question, which appears after the geography tree.

After you select a geography, scroll down the screen and choose the final filter: whether to include or exclude patrons outside the geography selected.

Note: If you are interested in a county, do not select all its block groups. AOD calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

After you select a geography, scroll down the screen to the final filter: whether to include or exclude patrons outside the geography selected.

Finally, the **location filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Analyze only those patrons that fall WITHIN your service area (defined above)** includes patrons only if their addresses lie within the service area geography you defined earlier. Clicking **Analyze all patrons and branches** includes all patrons regardless if their addresses lies outside the service area geography you defined earlier.

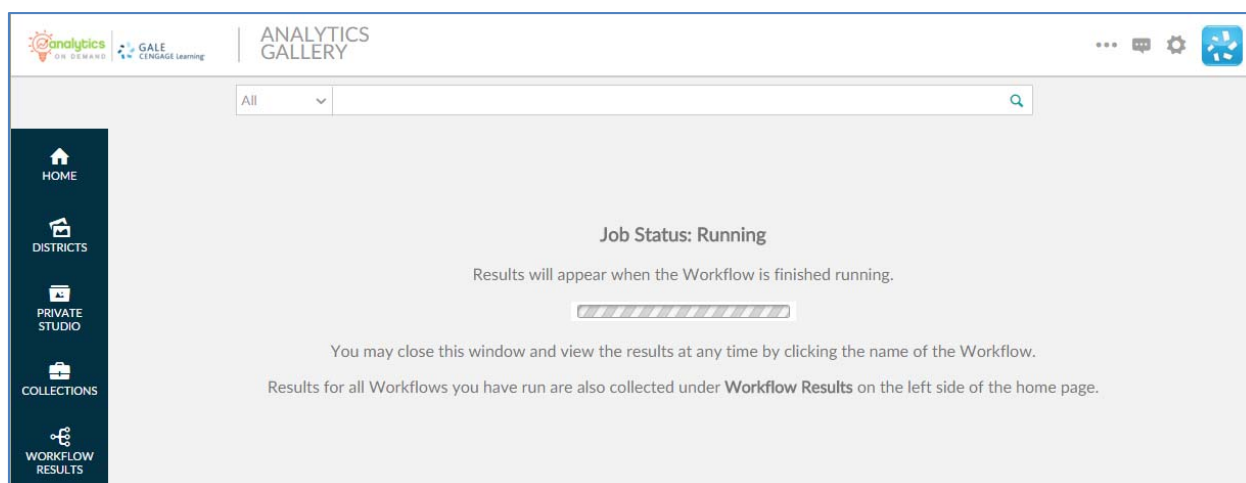
Location Filter:

Analyze all patrons and branches, regardless of their location. (maps will still be zoomed to sytem geography)

Analyze only those patrons and branches that fall WITHIN your service area (defined above).

After selecting the **location filter**, click **RUN** at the lower left side or top of the screen to begin the analysis.

You will see the following screen while the job is running.



Please note that it is not necessary to wait until the analysis completes. By clicking the **COLLECTIONS** link on the left side of the screen, you can return to the original workflow screen and the analysis will run in the background.

When the analysis is finished, the results can be found in the **WORKFLOW RESULTS** link on the left side of the screen. You can also log out or execute another AOD workflow analysis.

If you want to make minor modifications and re-run the analysis with a different filter, select the **RE-RUN** button at the top of the screen. All your information is saved and you can modify any earlier choices to re-run the analysis.