

Circ Reports Hither and Yon

CARLI Resource Sharing Forum
April 16, 2008

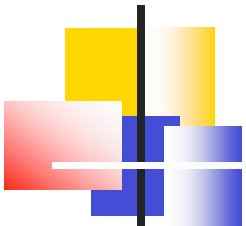
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CARLI Staff



There are 2 Kinds of Reports in the World

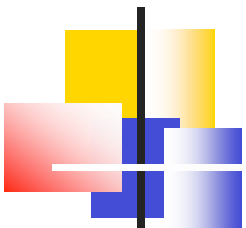
Do Something! Reports

Counting Stuff Reports



But First...

Do you know the 3-letter code for your library?



Do Something! Reports:

The Ones in the Reporter Client

The Exception Reports – Run daily for all libraries

- Item Related Exceptions
- Patron Related Exceptions
- Transaction Related Exceptions

These are your audit of what circ staff did yesterday.



Do Something! Reports:

The Ones in the Reporter Client

Hold Shelf Expired Report – Run daily for all libraries

Lists items that should be removed from your hold shelf.



Do Something! Reports: The Ones in the Reporter Client

Missing In Transit Report (circ job 22)

Daily: uic

Mondays: gsu lew lfc trn uis wiu

1st: icc rmc

Could be used to start a search for items gone astray



Do Something! Reports: The Ones in the Reporter Client

Reserve Items Active (circ job 20)

2nd: mck

Daily: uic

Reporter lets you list these

- by call number
- by title
- by course & call number
- by course & title



Do Something! Reports:

The Ones in the Reporter Client

Reserve Items Expired (circ job 21)

Daily: uic

Reporter lets you list these

- by call number
- by title
- by course & call number
- by course & title



Do Something! Reports:

The Ones in the Reporter Client

Distribution Item Order List (circ job 28)

Mondays: lfc



Do Something! Reports:

The Ones in Your ftp Directory

The Dead Requests Report – Run daily for all libraries
Named: dead_req_XXX_Mar21_0030.txt
Documented at “Dead Requests”.

Lists requests placed by your patrons that I-Share can't fill.

You could use this to

- re-place the request for a different edition
- place the request in WorldCat
- consider purchasing the title



Do Something! Reports:

The Ones in Your ftp Directory

UB Stat 3: Borrowed Titles – Run monthly for all libraries

Named: ubstat_3_xxx_mmyy.rpt

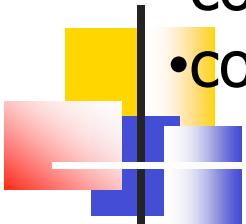
Documented at “Voyager Stats Pack”

Lists titles that

- your patrons requested
- were filled by another library
- whether or not the patron charged it out

You could use this to

- consider buying this title
- consider buying more titles in this subject area



Do Something! Reports:

The Ones in the Annual Stats Package

There aren't any!

The annual stats package only has Counting Stuff reports.



Do Something! Reports: The Ones in Access

Documented at "Shared SQL"
then click Local Circulation Maintenance

A great place to browse!



Do Something! Reports: The Ones in Access

Cannot Delete Patron

When you can't delete a patron record, this gives you all the reasons why.

It prompts you for a patron barcode.

If the copy in your CARLI_reports.mdb is dated before 8/22/2006, get yourself a fresh copy.



Do Something! Reports: The Ones in Access

Bad Email Address

Lists unusable email addresses



Do Something! Reports: The Ones in Access

Patron Purge & Expiration Dates:

Count Patrons by expire_date

Count of Patrons by purge_date

Expired Patron Records for Deletion

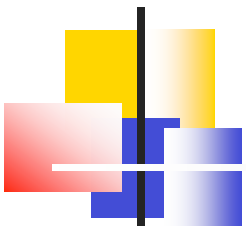
Patron record purge date information

These are useful for planning a patron record purge
(circ job 39)



Now let's turn to the Counting Stuff reports

*Sometimes it's more important to be
consistent than to be correct.*



Counting Stuff Reports: The Ones in the Reporter Client

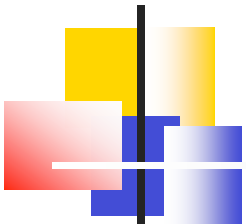
Circ Transaction Statistics Report (circ job 23)

Daily: uic

1st: iit mck rmc

Counts charges, renewals, discharges, fines/fees collected

Each circ happening location gets its own statistics.



Counting Stuff Reports: The Ones in the Reporter Client

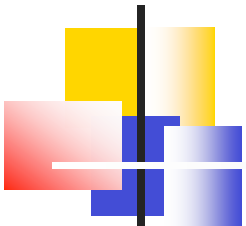
Global Circ Transaction Statistics Report (circ job 25)

Daily: tiu uic

1st: aru gsu hrt icc iit jwc kcc lew mck nlu npu rmc sie uis wiu

Counts charges, renewals, discharges, fines/fees collected

Produces a single report that includes statistics for all circ happening locations.



Counting Stuff Reports: The Ones in Your ftp Directory

UB Stats 1 & 2 – run monthly for all libraries
Named: ubstat_1_and_2_xxx_yymm.rpt
Documented at “Voyager Stats Pack”.

UB Stat 1 is the items you lend (outgoing)
UB Stat 2 is the items your patrons borrow (incoming)

Counts the UB traffic with other I-Share libraries

on-site = charged at the item’s home library
off-site = charged somewhere else



UB Stat 1 [Outgoing/Lending]

dpu		loaned to:		itself		13076		
dpu		off-site		loaned to:		ZARU		5
dpu		on-site		loaned to:		ZARU		0
dpu		off-site		loaned to:		ZAUG		26
dpu		on-site		loaned to:		ZAUG		0
dpu		off-site		loaned to:		ZBEN		11
dpu		on-site		loaned to:		ZBEN		3

<snip>

=====

UB Stat 2 [Incoming/Borrowing]

aru		on-site		loaned to:		ZDPU		0
aru		off-site		loaned to:		ZDPU		22
aug		on-site		loaned to:		ZDPU		0
aug		off-site		loaned to:		ZDPU		28
ben		on-site		loaned to:		ZDPU		0
ben		off-site		loaned to:		ZDPU		11



Important!

UB STATS 1 & 2 count completed UB transactions, in other words, those where the item was ultimately charged to the patron.

They count what your patrons got, *not* what your circ staff handled.



Counting Stuff Reports: The Ones in Your ftp Directory

UB Stat 4: UB Requests Placed and Filled
Run in July for all libraries
Named: ub_stat_4_xxx_yy.rpt
Documented at "Voyager Stats Pack"

Designed to help you fill out the
"ILLINET Interlibrary Loan Traffic Form"



xxx UB Stat 4: UB Requests Placed and Filled

01-JUL-07

Incoming ILL.....	Outgoing ILL.....	Fill	Lending
Requests by My Patrons	Requests for My Items	Rate	Rate
Placed	Placed	Rate	Out/In
Filled	Filled		
-----	-----	-----	-----
21739	21264	87.9	131.4

The percent of requests made of my library that we filled.
 $18682 / 21264 = 87.9\%$

My library is a net lender because this ratio is over 100%.
 $18682 / 14214 = 131.4\%$



Counting Stuff Reports:

The Ones in the Annual Stats Package

Stats in the annual statistics package are placed in your ftp directory on July 2.

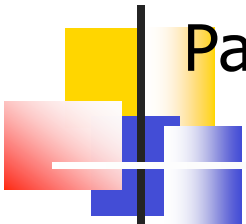
(Except we run them on June 2 for ilc and May 2 for sie.)

Documented at “Voyager Stats Pack”.

They are also available in Access.

- formatted a bit better
- can be run for any time period

There are also various collection counts in the Annual Stats Package, but we’ll focus on the circ reports today.



Counting Stuff Reports:

The Ones in the Annual Stats Package

Circulation Stat 1. Circulation by Item Location
Named: circ_stat_1_xxx_yy.rpt

Counts items charged and renewed
by the item's permanent location



Counting Stuff Reports:

The Ones in the Annual Stats Package

Circulation Stat 2. Circulation by Happening Location
Named: circ_stat_2_xxx_yy.rpt

Counts charges, discharges, and renewals
by the circ happening location



Counting Stuff Reports:

The Ones in the Annual Stats Package

Circulation Stat 3. Circulation by Patron Group/Home Library
Named: circ_stat_3_xxx_yy.rpt

Counts items charged and renewed
by the patron group and home library



Counting Stuff Reports:

The Ones in the Annual Stats Package

Circulation Stat 4. Serial Circulation
Named: circ_stat_4_xxx_yy.rpt

Counts charges of print serials
listing the serial title, main entry, and ISSN

If your library circulates serials, this is a measure of which titles are most used.



Counting Stuff Reports:

The Ones in the Annual Stats Package

Circulation Stat 5. Comprehensive Circulation by Happening Location

Named: circ_stat_5_xxx_yy.rpt

Counts items charged, discharged, renewed, and routed in, as well as fine/fee transactions by circ happening location



Counting Stuff Reports:

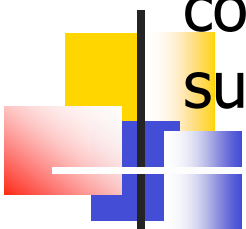
The Ones in the Access

Conspectus Charge Counts
Conspectus Renewal Counts
Documented at "Shared SQL".

Conspectus is a mapping of Dewey and LC call numbers into a set of subject categories.

Consider using these stats for accreditation.

There are other Conspectus stats in Access that count collection strength, purchasing, and collection age by subject category.



Conspectus Charge Counts

DIVISION	CATEGORY	CALL_NO_RANGE	CountOfCharges
Agriculture	Plant Culture	SB0-9999	1
Anthropology	Anthropology, General	GN0-298	1
Anthropology	Manners & Customs, General	GT0-9999	2
Art & Architecture	Architecture	720-729	3
Art & Architecture	Architecture	NA0-9999	19
Art & Architecture	Arts in General	700	1
Art & Architecture	Decorative Arts, Applied Arts	NK0-9999	2
Art & Architecture	Graphic Arts, Drawing, Design	NC0-9999	6
Art & Architecture	Painting	745.67	1
Art & Architecture	Photography	TR0-9999	2
Art & Architecture	Visual Arts in General	701-708	2
Art & Architecture	Visual Arts in General	N0-9999	5



Counting Stuff Reports: The Ones in Access

Busy Times at a Circ Desk

Counts charges and renewals

- at a circ happening location
- broken out by day of week and time of day

Useful for planning staffing needs at a circ desk.



Counting Stuff Reports: The Ones in Access

Call Slip – Unfilled Requests

Lists call slips that were unfilled or expired during a time period.

This might be useful for studying circ desk activity.



Counting Stuff Reports:

The Ones in Access

Call Slip Processing by Date Range

For each circ happening location, lists

- call slip status
- unfilled reason
- average and max processing time
- count of call slip processed
- day of week and hour of day

Shows how quickly and completely your circ staff process call slips.

