Resource Sharing Statistics:
Navigating the Numbers, Harnessing the Data

Making WorldShare and ILLiad Statistics Meaningful
November 9, 2016

Amy
Welcome to the Resource Sharing Statistics: Navigating the Numbers, Harnessing the Data webinar.
This presentation will focus on the interlibrary loan data provided available through either WorldShare or ILLiad.

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Introduction - Amy then Marcella
Marcella (after we introduce ourselves)
We are the co-chairs of the CARLI Resource Sharing Committee.

While we are not statisticians, in fact precisely because we aren't, we thought it would be helpful to share how we utilize statistics available from WorldShare or ILLiad at our libraries.
I will be presenting about WorldShare, and Amy will be presenting about ILLiad today.

How You Can Use the Data

Discuss at monthly meetings of the circulation and ILL departments to improve services and workflows

Budgeting - out-of-state shipping, articles that require payment to obtain, payment for lost materials

Included in annual or semiannual Circ/ILL reports to demonstrate "library value"

Reports ACRL/ARL/ILLINET Survey

All the data you can collect from both WorldShare and ILLiad can be manipulated in many ways to answer questions about how the circulation and ILL departments function. I'll show some of the different ways this information can be useful for immediate staff and the library.

Beyond that, budgeting is important to both the library and the college at large. So, much of these reports can be used to highlight the value of the library for the college.

This information is also used for the ACRL/ARL/ILLINET Survey.
The ACRL or Association of College and Research Libraries and ARL, Association of Research Libraries have a joint advisory task force. They cover the "Gerould Statistics" which is the oldest continuing library statistical series in North America." They have data on collections, staffing, expenditures, and services, of which interlibrary loan is one.

The ILLINET survey officially the Interlibrary Loan Traffic Survey must be completed every year. Just as the survey title implies, this deals specifically in interlibrary loans and though it is Illinois specific, it will also ask questions regarding borrowing and lending outside of Illinois.
The Illinois State Library is responsible for collecting and analysing the statewide interlibrary loan and reciprocal borrowing statistical data.

What You Can Say with the Data

Internal reports to improve ILL workflows

Determine "peak times" of year for ILL requests

Interlibrary loan annual summaries

Determine how many patrons are actually using ILL services

In-state versus out-of-state borrowing

Copyright clearance for articles

Collection development for print materials based on frequency of requests

A number of things can be deciphered from all the various reports available -.

Peak borrowing times can be determined allowing for proactive staffing decisions. If numbers are particularly high at the beginning of the semester and closer to final exams and final papers it may be advisable to rotate staff accordingly.

Annual statistics reveal the use of interlibrary loan over time, last two years, five years, 10 years. For instance, at COD we saw a major drop in loan requests when we joined CARLI and were able to offer I-Share to our patrons.

As physical item requests dropped we saw a rise in copy requests that could be traced to other reasons, for instance a change from print to online and the resulting embargos..
You can also determine if there is a shift in the type of patrons making requests, both for books and for articles.

In-state versus Out-of-state borrowing affects both the expenditures and turn-around time as things take longer to get to your library when using a postal service versus ILDS. Most obvious expenditures are shipping charges which affect both the borrower and the lender. Some lenders will charge a fee to libraries from out of state to defray these shipping costs by laying them on the borrower. But even for articles, some libraries will charge a fee to out-of-state borrowers.

Looking at which journals are often requested may affect purchasing decisions, even so far as deciding between print or online subscriptions. As I mentioned, a large number of online journals have embargoes in place which don't allow access to the most current articles for a certain period of time. Also, some vendor contracts won't allow one library to lend an online journal article to another.

A decision can be made whether to subscribe or if, as is often the case, solitary articles are requested from multiple journals. Perhaps copyright clearance is the way to go.

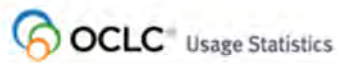Tracking requests can be of import to collection development in general.

Poll Question:

Do you use WorldShare or ILLiad to process interlibrary loan requests?

Image Credit:
Damián Navas "question mark"
https://flic.kr/p/9ksxQa

Before I begin talking about the WorldShare data available to you, we're interested in seeing how many people are using WorldShare and how many are using ILLiad

Talk about poll results as they are showing up
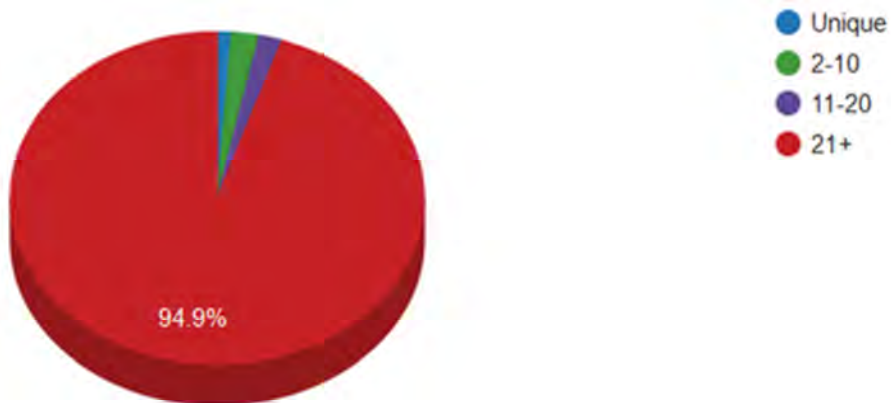
OCLC Usage Statistics Portal

So, as some/many of you know, OCLC has a number of reports available via the Usage statistics. These are free to all institutions having ILL access. The reports can always be viewed from the worldshare website. There's no need to place an order for them.

You can find useful reports in usage statistics under 2 different tabs. First is the Assessment Tools tab. First to discuss, it's the last tab on the list. There you find the WorldCat Collection Dashboard, the ILL Reciprocity Report, one for Borrowed Journal titles, and the Lender String Report.

WorldCat collection dashboard has three charts available.These do not represent any interlibrary loan activity. They are a view of your collection at hand, which may be useful as such to present to the board.

The Holding comparison, as you can see, is a pie chart of your collection compared all other libraries. Some libraries may have a relatively large unique section.

WorldCat Collection Dashboard – Publication Dates
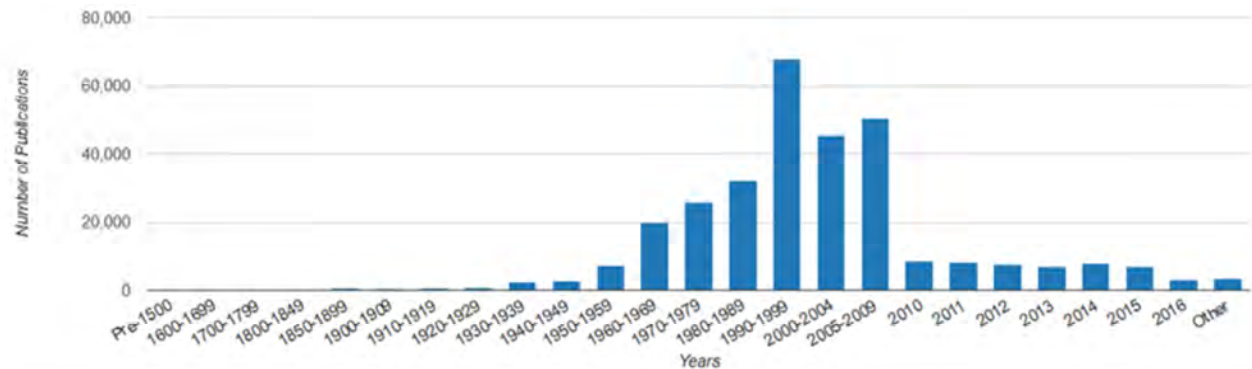
Here you see publication dates at a glance, also perhaps of good use to librarians for their collection development.

This collection is heavy from the mid-20th century to earlier part of this one. Some new things coming in but early publications must be obtained from somewhere else. Of course, as a community college our students would be less likely to be searching for older books, so interlibrary loan should serve our purposes nicely.

WorldCat Collection Dashboard - Formats

- report.format.archv
- report.format.audiobook
- report.format.book
- report.format.jrnl
- report.format.map
- report.format.msscr
- report.format.music
- report.format.video
- Other

15.3%
6.4%
69.7%

In an ever-changing world where newer formats are always coming into being this may be a very useful tool.

It will show where a library is on the cutting edge in the most current formats, but also show the library keeping hold of the old, now possibly very rare, items which are on track to become obsolete. But for a researcher may make all the difference.

WorldCat Collection Dashboard - Conspectus subjects
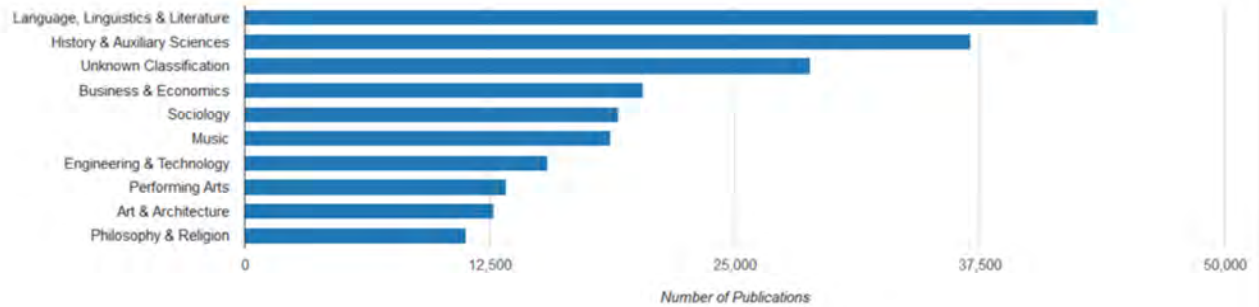
Libraries are often better equipped for one subject than another and this chart would help see if the collection is in step with what students are needing.
Interlibrary Loan activity would then also help support any arguments for change or for status quo.

Assessment Tool: ILL Reciprocity Report

Period: September 2016 ▼ Months: 6 [Update]

⬇ Export

ILL Reciprocity Report

REPORTING PERIOD:	INSTITUTION:	SYMBOL:
September 2016 - April 2016	COLLEGE OF DUPAGE LIBR	IBI

Avg Cost: [0] [Update]

OCLC Symbol	Library Name	State	Cost to Library	Net Lends	Lends	Borrows	Lends (Copy)	Lends (Original)	Borrows (Copy)	Borrows (Original)
AAA	AUBURN UNIV	AL	$0.00	0	1	1	0	1	1	0
AAOOS	AMERICAN ACAD OF ORTHOPAEDIC SURGEONS	IL	$0.00	1	1	0	0	1	0	0
AD#	NAVAL POSTGRADUATE SCH	CA	$0.00	1	1	0	0	1	0	0
AEK	US ARMY CORPS OF ENG, ROCK ISLAND DIST	IL	$0.00	1	1	0	0	1	0	0
AERDC	US ARMY ENG RES & DEV CTR	MS	$0.00	1	1	0	0	1	0	0
AGLSL	STATE LIBR OF LOUISIANA ISO ILL	LA	$0.00	2	2	0	0	2	0	0
AKC	UNIV OF CENT ARKANSAS	AR	$0.00	1	1	0	1	0	0	0
ALM	UNIV OF ALABAMA	AL	$0.00	1	1	0	0	1	0	0
ALV	ARROWHEAD LIBR SYST	MN	$0.00	1	1	0	0	1	0	0
AMH	AMHERST COL	MA	$0.00	-1	0	1	0	0	0	1

The next report also under the Assessment Tools, is the ILL Reciprocity report.

Here you can compare the level of borrowing to lending with each library, this for both loans and copies.

Having the information regarding costs to Library available, also helps in deciding if a library should be considered a top tier partner. Maybe one is more successful with loans as opposed to copies, or vice-versa.

Assessment Tool: Journal Title Borrowed - Institution

Journal Titles Borrowed -- Institution

REPORTING PERIOD:	INSTITUTION:	SYMBOL:
September 2016 - October 2015	COLLEGE OF DUPAGE LIBR	IBI

OCLC #	Title	ISSN	Requests Sent	Requests Filled
10259540	TEACHING AND TEACHER EDUCATION.	0742-051X	1	1
10669425	UTNE READER.	8750-0256	1	0
11027442	UNIVERSITY OF CALIFORNIA, BERKELEY, WELLNESS LETTER.	0748-9234	1	1
11520319	EXECUTIVE EXCELLENCE.	8756-2308	1	1
11793643	JOURNAL OF PSYCHOPATHOLOGY AND BEHAVIORAL ASSESSMENT.	0882-2689	1	1
11908022	ENGLISH TODAY.	0266-0784	1	1
11961054	TOPICS IN GERIATRIC REHABILITATION.	0882-7524	2	2
12093834	JOURNAL OF EDUCATION FOR BUSINESS.	0883-2323	2	2
123539820	MIND, BRAIN AND EDUCATION : THE OFFICIAL JOURNAL OF THE INTERNATIONAL MIND, BRAI	1751-228X	1	1
1242039	NOTTINGHAM FRENCH STUDIES.	0029-4586	1	1
12534133	SOCIOLOGICAL FORUM.	0884-8971	1	1
12849809	AIR & SPACE SMITHSONIAN.	0886-2257	1	1
13134789	INTELLIGENCE AND NATIONAL SECURITY.	0268-4527	1	1
1332710	AMERICAN BEHAVIORAL SCIENTIST.	0002-7642	2	2

This next report can be very useful for article requests.

When looking for the availability of a journal title it saves an enormous amount of time to already know that libraries have lending privileges for that specific title.
It may of course also depend on the volume and issue,but it is a great place to start.

Assessment Tool: Lender String Report

Lender String Report

REPORTING PERIOD:	INSTITUTION:	SYMBOL:
September 2016 - April 2016	COLLEGE OF DUPAGE LIBR	IBI

Enter the percentage filled number to indicate if evaluation is needed [0] [Update]

		Original							Copy						
Lender Symbol	Lender name	Number of times in Lender String	Number of times Supplied?	Number of times Not supplied?	Time to Respond	Percentage Filled	Percentage UnFilled	Evaluate	Number of times in Lender String	Number of times Supplied?	Number of times Not supplied?	Time to Respond	Percentage Filled	Percentage UnFilled	Evaluate
A1T	COASTAL PINES TECH COLL	0	0	0	0	0	0	-	1	0	1	3.00	0.00	100.00	N
AAA	AUBURN UNIV	2	0	2	1.50	0.00	100.00	N	1	1	0	2.00	100.00	0.00	N
ABC	UNIV OF ALABAMA, BIRMINGHAM	1	0	1	1.00	0.00	100.00	N	0	0	0	0	0	0	-
ACM	MARX LIBR UNIV OF S ALABAMA	1	0	1	0.00	0.00	100.00	N	0	0	0	0	0	0	-
AKH	HENDERSON STATE UNIV	1	0	1	1.00	0.00	100.00	N	0	0	0	0	0	0	-
AMH	AMHERST COL	1	1	0	1.00	100.00	0.00	N	0	0	0	0	0	0	-
AMN	UNIV OF MONTEVALLO	1	0	1	0.00	0.00	100.00	N	0	0	0	0	0	0	-
AMU	ALABAMA STATE UNIV	1	0	1	1.00	0.00	100.00	N	0	0	0	0	0	0	-
ANG	ANGELO STATE UNIV LIBR	0	0	0	0	0	0	-	1	1	0	1.00	100.00	0.00	N
ANTCH	ANTIOCH UNIV LIBR	0	0	0	0	0	0	-	2	1	1	1.00	50.00	50.00	N
AS4	ARKANSAS STATE UNIV, BEEBE	1	0	1	0.00	0.00	100.00	N	0	0	0	0	0	0	-

The last report under the assessment tools is the lender string report.

As opposed to the journal title borrowed report, this includes both copy and loan requests. Loans and copies are in separate columns.

And this includes the response time and percentages of filled requests.
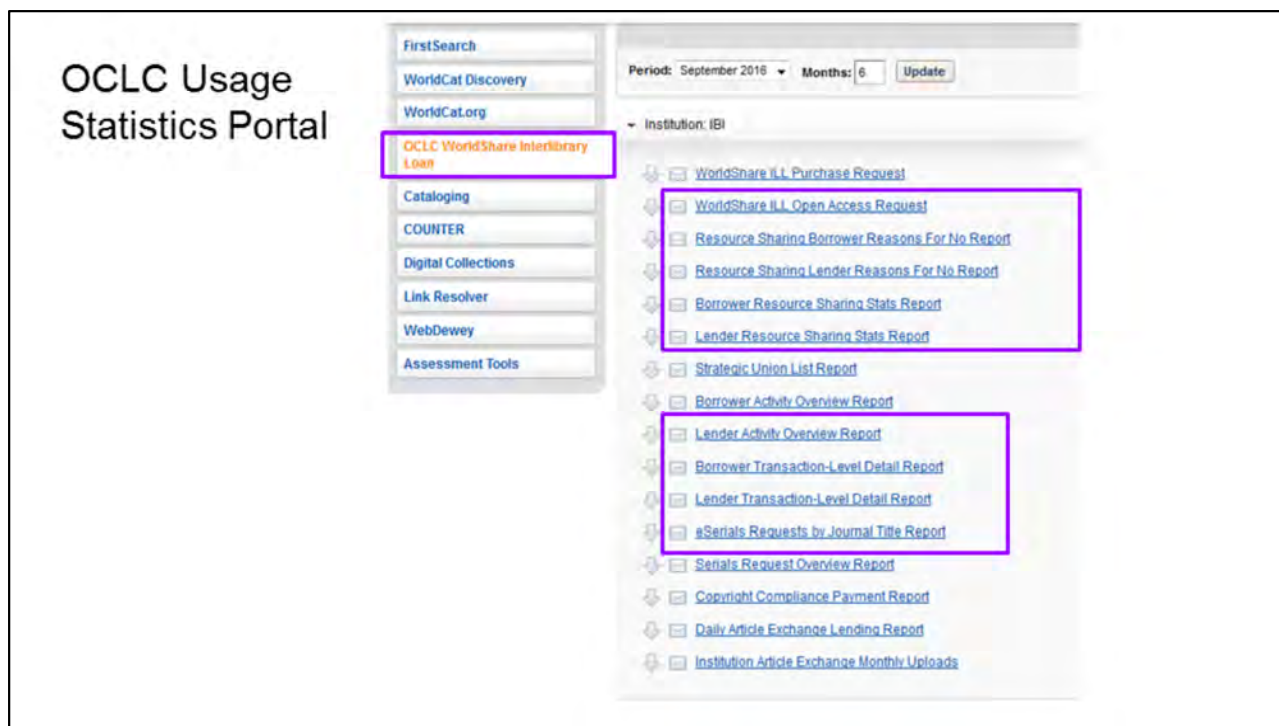
That was it for the Assessment tools. The other tab containing useful reports is OCLC worldshare interlibrary loans. Here you find a host of other reports.

The new open access report is of interest.

The reasons for no- is useful, in different ways, for both the lending and the borrowing side of ILL. This data can affect both staffing and workflow.

Lender and Borrower activity reports both overview and detail, contain many individual statistics - total number, filled, unfilled, cancelled, and also a turn-around average.

Lender Activity Overview Report

Lender Activity Overview Report -- Institution

REPORTING PERIOD: September 2016 - April 2016	INSTITUTION: COLLEGE OF DUPAGE LIBR	SYMBOL: IBI

		History				
	Sep 2016	Aug 2016	Jul 2016	Jun 2016	May 2016	Apr 2016
Requests Received	1083	753	549	617	648	790
Requests From WorldCat	1070	739	544	611	643	786
Requests Cancelled	6	8	5	8	9	6
Requests Filled	212	166	100	140	126	149
Loan	148	137	72	104	90	102
Copy	64	29	28	36	36	47
Requests Unfilled	864	591	433	484	514	654
Average Turnaround Time For Filled Requests (dd:hh:mm)	0:21:36	1:02:38	1:11:02	0:18:14	0:17:17	0:16:05
Average Turnaround Time For Unfilled Requests (dd:hh:mm)	0:09:50	0:11:31	0:10:05	0:06:43	0:03:36	0:05:02

So let's start with the Lender Activity Overview Report. These reports default to showing the last 6 months but you can, however, choose a period of time you would like to cover. For instance doing a fiscal year report.

You can see the total of all initiated requests showing whether they were filled, unfilled or cancelled, also separating the loan and copy requests.

The top line, the requests received includes not only worldcat requests, but also requests from other systems such as ILLiad, RAPID, DOCLINE and such. Regardless of whether you participate in these programs, a borrower may be using one of these systems to submit the request.
 Amy will go into detail about ILLiad a bit later.

Borrower Activity Overview Report

Period: October 2016 ▾ Months: 6 [Update]   ⬇ Export

Borrower Activity Overview Report -- Institution

REPORTING PERIOD: October 2016 - May 2016	INSTITUTION: COLLEGE OF DUPAGE LIBR	SYMBOL: IBI

		History					
		Oct 2016	Sep 2016	Aug 2016	Jul 2016	Jun 2016	May 2016
Requests Initiated		154	154	95	79	130	158
Requests From WorldCat		154	154	95	79	130	158
Requests Cancelled		6	1	1	2	1	6
Requests Filled		122	141	78	86	117	129
Loan		80	85	61	61	90	95
Copy		42	56	17	25	27	34
Requests Unfilled		10	14	7	17	10	20
Average Turnaround Time For Filled Requests (dd:hh:mm)		3:22:34	4:02:10	4:19:41	5:04:19	5:13:41	4:18:29
Average Turnaround Time For Unfilled Requests (dd:hh:mm)		6:10:34	22:14:24	17:18:43	8:11:46	33:07:12	9:19:41
Open Access Requests							
Requests Filled		6	5	3	0	0	0

Here now are the numbers for the borrowing side of interlibrary loan. .

If you notice, for the month of July there are more filled requests, 86, than requests initiated which was 79.
This is because each request running during the month gets counted. In other words if a requests is placed at the end of the month it gets counted for that month, but also in the following month if it is still looking for a lender.
This can cause some rather skewed stats when you consider that you must also subtract the unfilled requests from the initiated totals. So in this case 17 of the requests remained unfilled which should only leave 62 possible requests that could be filled, yet there are 86, a huge discrepancy.

 This does balance itself out when looking at yearly totals where only those of the last month would possibly carry over. Since yearly stats are what is typically used for presentation to a board or administration, you should be alright showing the yearly numbers.

A very practical feature offered with all of these reports is the easy export to excel where the numbers can be turned into graphic data.
You can see the button in the upper right hand corner.

Using Borrowing Activity Overview Data

ILL Borrowing Overview Fiscal 2015-2016
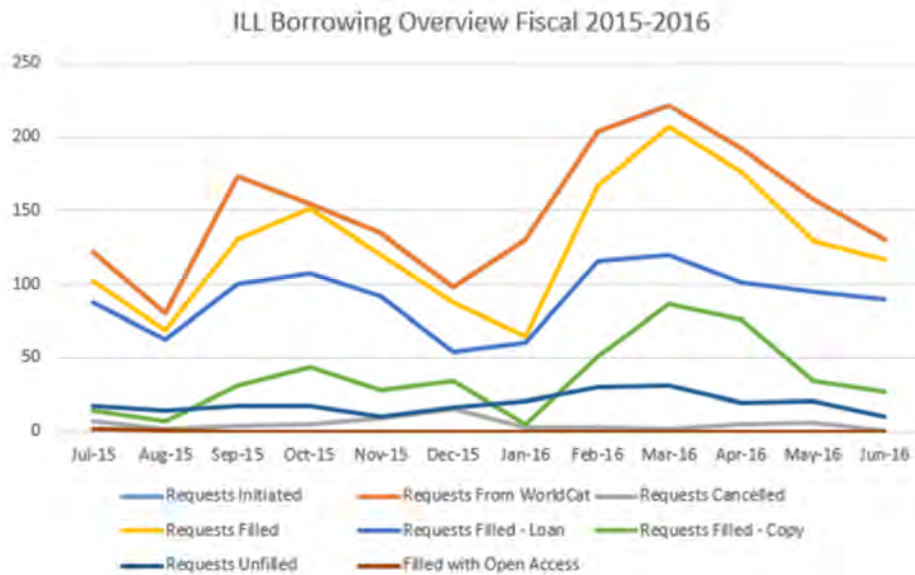
OCLC allows for the quick transfer to excel with all of the Interlibrary Loan reports, thus making for easy creation of bar or line graphs, which is what tends to be the clearest way to present data. Those viewing may not understand all the library processes but they can easily comprehend the ups and downs illustrated in a line graph.

One thing that becomes apparent is that there is a higher spike half way through the spring semester compared to the start of the fall. This may be useful to present to administration. Perhaps incoming students need to be informed about the interlibrary loan services the library offers.

Right now our open access line is at the bottom, but I should hope this will pick up rapidly in the near future.

Open Access Report

WorldShare ILL Open Access Request

REPORTING PERIOD: September 2016 - April 2016	INSTITUTION: COLLEGE OF DUPAGE LIBR	SYMBOL: IBI

		History				
Month	Sep 2016	Aug 2016	Jul 2016	Jun 2016	May 2016	Apr 2016
Requests Filled	5	3	0	0	0	0

CARLI Resource Sharing Committee 2016 Annual Project
Open Access and Interlibrary Loan

https://www.carli.illinois.edu/products-services/i-share/circ/OpenAccessILL

OCLC runs a separate open access report shown here. We will hopefully observe a steady rise in numbers as articles become available through various open access sources.

In fact, last year the CARLI Resource Sharing Committee created a detailed open access resource guide.

The project, Open Access and interlibrary loan, can be retrieved from the CARLI website at the address shown here on the screen.

This report will surely be of interest as colleges discuss the future of open access, not just for interlibrary loan requests, but even for open educational resources in general.

Lender Reasons for No Report

Resource Sharing Lender Reasons For No Report

REPORTING PERIOD:	INSTITUTION:	SYMBOL:
September 2016	COLLEGE OF DUPAGE LIBR	IBI

ILL Record Number	Illiad TN	Title	OCLC #	Imprint Date	Article(Citation)	Date(Citation)	Borrower Symbol	Borrower Full Name	Reason For No	Lender Unfilled Date
169413236		SEQUENCE KNITTING : SIMPLE METHODS FOR CREATING COMPLEX REVERSIBLE FABRICS	911062844		SEQUENCE KNITTING : SIMPLE METHODS FOR CREATING COMPLEX REVERSIBLE FABRICS		AOP	ALTOONA AREA PUB LIBR	IN USE ON LOAN	9/1/2016
169886478		STARGIRL	43207653		STARGIRL		ZOV	ROBERT R JONES PUB LIBR	POLICY PROBLEM	9/9/2016
169886514		STARGIRL	43207653		STARGIRL		ZOV	ROBERT R JONES PUB LIBR	UNSPECIFIED	9/9/2016
169886538		STARGIRL	43207653		STARGIRL		ZOV	ROBERT R JONES PUB LIBR	UNSPECIFIED	9/9/2016
169886584		STARGIRL	43207653		STARGIRL		ZOV	ROBERT R JONES PUB LIBR	UNSPECIFIED	9/9/2016
169886604		STARGIRL	43207653		STARGIRL		ZOV	ROBERT R JONES PUB LIBR	UNSPECIFIED	9/9/2016
169886626		STARGIRL	43207653		STARGIRL		ZOV	ROBERT R JONES PUB LIBR	UNSPECIFIED	9/9/2016

The next report I want to show you is the OCLC Lender Reasons for no.
This report is helpful when discussing workflow and staffing for the department. As each item is listed separately and consecutively a pattern may begin to emerge. This may influence decisions regarding those two aspects, workflow and staffing.

Borrowing issues can appear, for instance, that one library requested the same item numerous times even though they received a no for the first one. Six no's look bad but they are for one single item..

Also, the auto deflects show up on this report - so is a way to check whether that policy needs to be corrected or updated on the policy page.

And again, there is a borrower counterpart to this report as well.

BOOK REQUESTS FOR MAY 2016

TITLE	TYPE	REQUESTED	RECEIVED	LIB	ST	SHIP	DUE DATE	RETURNED	BARCODE	NOTES
Assessing learners with special needs	M	5/2/2016 card issue							166441685	also current year publication
Canadian rockies	M	5/2/2016	5/9/2016	JX3	P	ILDS	6/3/2016	5/20/2016	166438044	
Creatine monohydrate supplementation	M	5/2/2016 at COD								no # and resistance training in older adults 4/30/16 email request
Cultural reformations: medieval and Renaissance	M	5/2/2016	5/10/2016	JCV	A	ILDS	5/10/2016	5/10/2016	166470794	copied the 19 pages, then returned to lending library
The effect of creatine monohydrate	M	5/2/2016	5/10/2016	OKU	A	UPS	5/30/2016	5/20/2016	166478357	
French pressed	M	5/2/2016	5/10/2016	IDO	P	ILDS	6/15/2016	6/8/2016	166447769	
Gardner's art through the ages Book C	M	5/2/2016 card issue							166441703	
Gardner's art through the ages Book C	M	5/2/2016 card issue							166441655	
Letting go of the person you used to be	M	5/2/2016	5/9/2016	HMO	P	ILDS	6/3/2016	6/6/2016	166448596	
Roast mortem	M	5/2/2016	5/4/2016	OJ4	P	ILDS	6/11/2016	6/8/2016	166447742	
Role development for the nurse practitioner	M	5/2/2016	5/6/2016	IAX	A	ILDS	5/31/2016	6/1/2016	166466999	
Socialized hate sound cassette	S	5/2/2016 media type							166440694	
Socialized hate sound cassette	S	5/2/2016 duplicate							166440695	
African -Americans and race relations in Gallatin	M	5/3/2016 no lenders							166499838	
The assassination option: a clandestine operations	M	5/3/2016	5/5/2016	LE9	P	ILDS	6/13/2016	5/17/2016	166485421	
The dirt diary	M	5/3/2016	5/6/2016	JVK	P	ILDS	6/14/2016	6/14/2016	166495965	
The effect of short-term supplementation	M	5/3/2016	5/6/2016	EZN	A	UPS	5/31/2016	5/31/2016	166498308	
The effects of 16 weeks of resistance training	M	5/3/2016	5/10/2016	OKU	A	UPS	5/30/2016	5/20/2016	166496408	
The effects of dietary creatine monohydrate	M	5/3/2016 at COD							no #	
Effects of resistance training in combination	M	5/3/2016	5/5/2016	OKU	A	elec	n/a	n/a	166496152	Thesis/dissertation sent via Article Exchange
Gallatin County, Illinois, slave & emancipation	M	5/3/2016	5/5/2016	IBK	A	ILDS	6/3/2016	6/9/2016	166499655	
The sacred journey (sound recording)	F	5/3/2016 media type							166489586	
Affirmative action in the higher education admissions	F	5/4/2016	5/5/2016	TSU	A	elec	n/a	n/a	no #	sent PDF
African -Americans and race relations in Gallatin	M	5/5/2016	3/11/2016	JNA	A	ILDS	6/5/2016	6/9/2016	166554600	
The moth catcher	C	5/5/2016 no lenders							166554876	
Big black lie: how I learned the truth about the Demo	M	5/6/2016	5/10/2016	JBZ	P	ILDS	5/27/2016	6/2/2016	166544652	
Grandma Galewood's walk: the inspiring story of the	S	5/6/2016	5/17/2016	IDO	P	ILDS	6/22/2016	6/13/2016	166540043	
Husband's secret	S	5/6/2016 I-Share							166571748	
It's OK to leave the plantation: the new underground	M	5/6/2016	5/10/2016	JBZ	P	ILDS	5/27/2016	6/2/2016	166544683	
Scam: how the black leadership exploits black Ameri	M	5/6/2016	5/16/2016	IUO	P	ILDS	6/13/2016 never p/up		166544660	
Silence makes the loudest sound: a conversation be	M	5/6/2016 no lenders							166544623	
Silence makes the loudest sound: a conversation be	M	5/6/2016 duplicate							166560743	
Unravel me	S	5/6/2016 I-Share							166571413	
The Boston girl	M	5/9/2016	5/13/2016	JCV	A	ILDS	6/6/2016	5/31/2016	166582243	
The cry of the owl	S	5/9/2016 I-Share							165568400	
The cry of the owl	S	5/9/2016 duplicate							166582650	
A dictionary of epidemiology	M	5/9/2016	5/12/2016	ICO	A	ILDS	7/9/2016 never p/up		166587782	

We keep our own excel sheet, notating all pertinent information for each request. Data for patron type, library type, in- or out-of-district, shipping, and all effective dates are plotted here.

Any issues preventing the request from being processed are also remarked in the file.

Specific data needed for the surveys is tabulated after about the 10th of the following month.

Tabulation of Manual Excel Data - Loans

Title		Date							ID
The iconography of Islamic art: studies in honour	S	6/29/2016	I-Share						167860306
The iconography of Islamic art: studies in honour	S	6/29/2016	duplicate						167862018
Islam: Muhammad and his religion	S	6/29/2016	at COD						167858780
The sacred trusts: pavilion of the sacred relics	S	6/29/2016	I-Share						167858396
The black stone an idol? Is pilgrimage a pagan rite?	S	6/30/2016	7/11/2016	TSW	A	UPS	7/27/2016	8/2/2016	167932322
Cancer and the family	S	6/30/2016	I-Share						167930438
Death in the English countryside	C	6/30/2016	7/13/2016	IW3	P	UPS	7/26/2016	7/18/2016	167951776
Fabelhaven. (book 2), rise of the evening star	M	6/30/2016	7/7/2016	JVK	P	ILDS	8/16/2016	8/17/2016	167910328
The fifth floor	M	6/30/2016	7/6/2016	JVX	P	ILDS	8/4/2016	7/20/2016	167931150
Four: a divergent collection	M	6/30/2016	7/7/2016	UO8	P	ILDS	7/31/2016	7/28/2016	167910678
Underwater dogs	C	6/30/2016	I-Share						167928862
What's a dog for? The surprising history, science	C	6/30/2016	I-Share						167928996

AT COD	3	IN STATE 64
I-SHARE	13	OUT STATE 16
MEDIA TYPE	3	ELECTRON 0
CURRENT	10	
DUP/TRIP	5	NEVER P/U: 10
CITATION	0	IN 11 OUT 7
MAX LIMIT	0	COM 10 COD 8
CARD ISSUE	2	
NO LENDER	19	

At the end of each month's report the numbers for all the reasons for no are tabulated and entered into a sort of mini chart. This is much more accurate than the OCLC report as we include specific reasons.
You can see here there were items available at our own library, or obtainable through I-Share.
Often students, and sometimes faculty I have to say, will disregard the policies and request items that are exempt from interlibrary loan.

Processing time is still required, albeit not as long or involved as for one that will get submitted.

Sometimes we have a card issue - This could mean an expired card, too many overdues or fines, exceeding the limit of requests etcetera.

These requests that were then cancelled would likely count against the numbers dragging our success rate down for the wrong reasons.

We also have requests coming through email rather than being requested directly from the catalog into OCLC. Those that could not be processed for whatever reason, possibly because there was no lender available, these would never be picked up by the OCLC statistics because they never went past the discovery, never received an OCLC request number. However, they are included in our manual statistics.

In- or out-of-state is also tracked as you can see, again for the purposes of the surveys I spoke of earlier.

Tabulation of Manual Excel Data - Articles

ARTICLE REQUESTS FOR JUNE 2016

TITLE	TYPE	REQUESTED	RECEIVED	LIB	ST	MODE	LO	ILL#	
What tv is doing to America	F	6/2/2016	at COD					no #	
Scripts and information units in future planning	F	6/2/2016	6/2/2016	ICL	A	AE	I	167151016	
Temporary devotion: the letters of genevra	F	6/2/2016	6/2/2016	ICV	A	PDF	I	167165828	
The effectiveness of early educational interventions	S	6/3/2016	no lenders					167174105	
What to do with the New Haven railroad?	C	6/3/2016	no lenders					167177881	
What to do with the New Haven railroad?	C	6/6/2016	6/22/2016	INU	A	PDF	I	167228779	
The difference an instant makes: Bachelard's	F	6/7/2016	6/7/2016	ICG	A	AE	I	167231794	
Taking Bachelard from the instant to the edge	F	6/7/2016	6/7/2016	JBE	A	AE	I	167231818	
Principles of equivalence	F	6/8/2016	6/13/2016	IAH	A	AE	I	167266884	
The effectiveness of early educational interventions	S	6/14/2016	6/15/2016	TTS	A	AE	O	167391752	
Impacts of hydraulic fracturing on water quality	S	6/14/2016	no lenders					167356041	
Recent trends in the use of food additives	M	6/14/2016	6/14/2016	ICG	A	AE	I	167386220	
Trends in marijuana legalization: a wake-up call	S	6/14/2016	6/14/2016	IAY	A	AE	I	167305935	
Impact of social media on the health of children	S	6/15/2016	6/20/2016	IAY	A	AE	I	167413631	
The pain of exile: what social workers need to know	S	6/15/2016	6/15/2016	INU	A	AE	I	167408509	
Privileging naturals over strivers: the costs	F	6/20/2016	6/27/2016	OPU	A	AE	O	167475068	
Impacts of hydraulic fracturing on water quality	S	6/22/2016	6/23/2016	WIS	A	AE	O	167616408	
The cannabis crop	S	6/23/2016	card issue					167651198	also, at COD
The effective use of enactments in family therapy	F	6/27/2016	6/27/2016	IAY	A	AE	I	167726842	
Masterminds by Gordon Korman	S	6/27/2016	at COD					167691498	
Pregnancy outcome in patients with stage 1a	S	6/27/2016	6/27/2016	ICA	A	AE	I	167692850	
Ilfarmaco; edizione scientifica	M	6/28/2016	card issue					167792836	
Impedance PH testing	M	6/29/2016	6/29/2016	INU	A	AE	I	167857020	

The same sort of manual reports are kept for article requests, the same sorts of cancellation reasons recorded. The mode of receipt is also tracked. That is, whether it was sent as PDF, article exchange, found in open access, or what is very rarely the case, sent with regular mail.

Reasons for cancellation are again tabulated in a mini chart, making the numbers easy to acquire when filling out the surveys.

Borrower Transaction-Level Detail Report -- Institution

Institution Name	Institution Symbol	Institution State	Library Type	Requests To Lender	Requests To Lender From WorldCat	Requests Canceled	Requests Filled	Requests Filled (Loan)	Requests Filled (Copy)	Requests Unfilled	Direct Request: Unmediated	Direct Request: Mediated	Average Turnaround Time For Filled Requests (dd:hh:mm)	Average Turnaround Time For Unfilled Requests (dd:hh:mm)
Totals Year-To-Date				2700	2700	69	1178	794	384	1514	0	493	0:22:19	1:01:12
Totals				304	304	1	139	81	58	163	0	0	0:15:22	1:00:00
ACORN PUB LIBR DIST	TZ8	IL	Public	1	1	0	1	1	0	0	0	0	1:00:00	0:00:00
ADDISON PUB LIBR	JVK	IL	Public	2	2	0	1	1	0	1	0	0	0:00:00	0:00:00
AMERICAN LIBR ASN	EH	IL	Other	1	1	0	0	0	0	1	0	0	0:00:00	1:00:00
ANCILLA COL LIBR	XUA	IN	Academic	1	1	0	0	0	0	1	0	0	0:00:00	6:00:00
ANDERSON UNIV	INA	IN	Academic	1	1	0	0	0	0	1	0	0	0:00:00	0:00:00
ANTIOCH PUB LIBR DIST	JX3	IL	Public										1:00:00	0:00:00
AUBURN UNIV	AAA	AL												
AUGUSTANA COL	ICY	IL												

Lender Transaction-Level Detail Report -- Institution

Institution Name	Institution Symbol	Institution State	Library Type	Requests Received	Requests From WorldCat	Requests Canceled	Requests Filled	Requests Filled (Loan)	Requests Filled (Copy)	Requests Unfilled	Electronic Link
Totals Year-To-Date				7100	7037	63	1414	986	428	5665	38
Totals				1083	1070	6	212	148	64	864	0
ABRAHAM LINCOLN PRESIDENTIAL LIBR	JFK	IL	State or Municipal Governments	2	2	0	2	0	2	0	0
ACORN PUB LIBR DIST	TZ8	IL	Public	1	1	0	0	0	0	1	0
ADLAI S STEVENSON HIGH SCH LIBR	QEB	IL	Schools Below College Level	2	2	1	0	0	0	1	0
ALGONQUIN AREA PUB LIBR DIST	GK5	IL	Public	1	1	0	0	0	0	1	0
ALTOONA AREA PUB LIBR	AOP	PA	Public	1	1	0	0	0	0	1	0

OCLC also provides a similar set of reports, the Borrower transaction-level detail report and its complement, the Lender transaction-level detail report.

These reports have much the same information, but broken down by each individual library.
Of course, these also lack the detail found in the manual reports. These can only be viewed one month at a time, but the first row is a running tally of totals for the year to date.

In addition, the borrower report includes number counts of mediated and unmediated requests, while the lender report records the number of electronic links.

Once the reports have been exported to excel the data can easily be manipulated to reveal percentages by library type or by in- or out-of-state transactions.
These are some of the statistics needed for the mandatory yearly ILLINET report.

Comparing Borrowing and Lending Data

Borrowing vs. Lending Year to Date
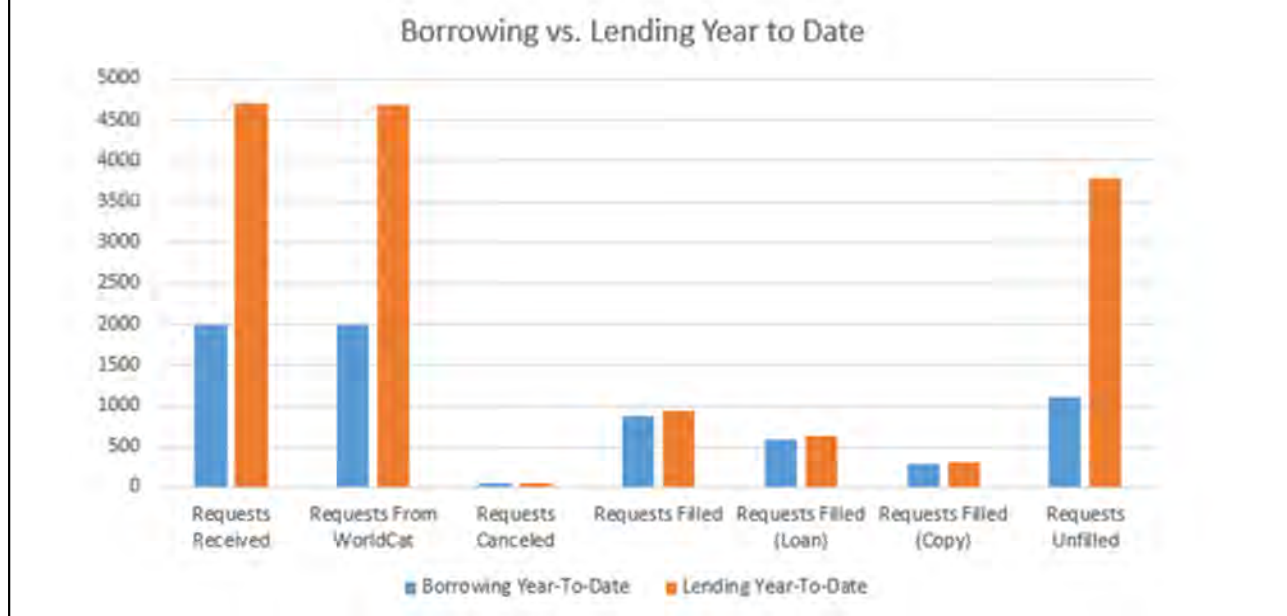
Putting together the transactions for year to date, from both the lending and borrowing reports allows for a side by side comparison.

You can see here, that though we receive more than double the amount of requests than we send out, in the end the fill count is quite close.

Still, this, of course, reflects badly on our fill rate. But it is misleading, as the auto-deflects included in the report never even reach our OCLC lending cue.

Our own statistics don't take the auto-deflects into account as they never reach us. They have no affect on our workflow, no time or energy is being spent on those requests.

So rather than having to justify the extremely high unfilled numbers, it makes sense to use our own statistics. These reflect the actual output of our staff - where the filled as well as the unfilled must still be processed.

Interlibrary Loan Statistics for July 2015 - June 2016

BOOKS (BORROWING) JULY 2015-JUNE 2016

	FILLED	NO LEND	CANCEL	TOTAL	ADMIN	CLASSIFIED	STUDENTS	FACULTY	COMM	ACADE	PUBLIC	Special	NEVER P/U
JULY	89	20	39	148	1	23	42	10	72	37	52	1	9
AUGUST	60	15	31	106	0	11	29	10	56	20	38	2	5
SEPTEMBER	107	20	84	211	0	16	81	17	97	47	55	5	15
OCTOBER	100	21	108	228	0	30	67	32	99	41	55	4	13
NOVEMBER	86	21	73	180	0	31	60	24	65	32	53	1	10
DECEMBER	40	12	15	67	0	8	21	4	34	14	23	3	3
JANUARY	95	50	58	203	2	23	103	13	63	46	44	5	7
FEBRUARY	119	34	71	224	0	16	86	13	108	64	52	3	17
MARCH	105	18	54	177	0	23	55	18	22	41	62	2	11
APRIL	91	12	53	156	0	19	57	17	63	33	58	0	18
MAY	105	15	51	171	0	27	41	13	90	49	56	0	6
JUNE	86	19	37	142	1	23	34	10	74	36	50	0	10
TOTAL	1,083	257	674	2,013	4	250	676	181	843	460	598	26	124

ARTICLES (BORROWING) JULY 2015-JUNE 2016

|	FILLED	NO LEND	CANCEL	TOTAL	ADMIN	CLASSIFIE	STUDENTS	FACULTY	COMM	ACADE	PUBLIC	Special	OPEN AC
July	14	5	12	31	0	5	15	7	4	13	0	0	1
August	8	0	4	12	0	1	2	5	4	6	0	1	1
September	43	5	26	74	0	2	41	18	13	37	1	5	0
October	38	5	55	98	1	7	57	8	25	32	0	4	2
November	29	0	9	38	0	1	26	9	2	27	1	0	1
December	33	7	6	46	0	0	7	35	4	32	0	0	1
January	6	3	4	13	0	1	8	3	1	6	0	0	0
February	55	13	20	87	0	2	55	24	6	53	0	2	0
March	85	21	14	120	0	4	75	28	13	83	1	1	0
April	84	7	30	121	7	0	92	16	6	79	2	2	1
May	32	11	3	46	0	1	16	18	11	30	1	1	0
June	28	8	8	44	0	3	15	9	17	25	2	1	0
TOTAL	455	85	191	730	8	27	409	180	106	423	8	17	7

Since we are able keep much more detailed statistics than what is offered by OCLC, we created a separate document pooling the year's data together.

This report is then passed on the dean of the library in order to share with other stakeholders.

The borrowing information included is fill status, patron type, library type, and for articles- open access.
Various graphs can be entered to ease the comprehension of the material by people with no direct connection to the library.

Comparing Filled and Not Filled Data
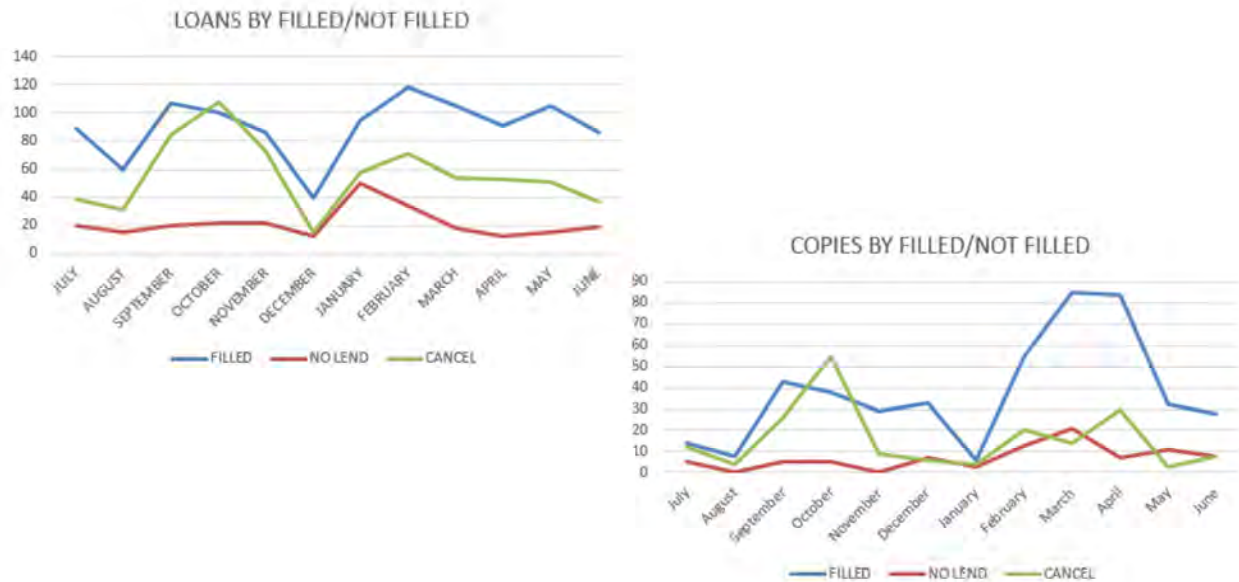
There is quite a bit of information evident in these graphs.

For instance, the fact that the number of cancelled requests went down in the second semester could be a sign that students understood better what can be obtained through interlibrary loans. You can see this in both the loans and the copies graph.

It may be that it would behoove the college to introduce students to both interlibrary loans and I-Share more strenuously at the time of orientation.

The patron type chart shows that community members, or district residents, are second in the quest for materials through interlibrary loans.
 They seem to make good use of this service. That would be something positive to present to the taxpayers and budgetary committees.

Comparing Requests by Patron Type

LOANS BY PATRON TYPE

COPIES BY PATRON TYPE
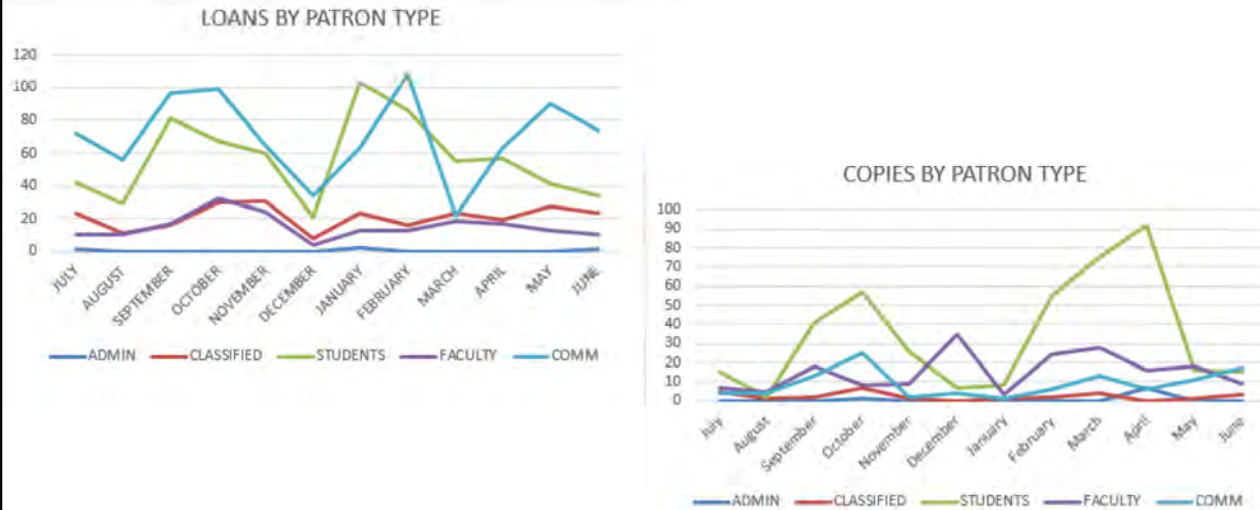
Looking at the patron type data it may be surprising that faculty borrow less than both students and community members, in fact they are even below classified staff. They do pick up some when it comes to copying, but they are still far below student usage.

You can observe, however, that faculty have a spike in journal articles during the Christmas break. This would lead me to believe they don't have the time to work on their own research during the term, even though for some it is crucial to their job.

Perhaps this is something faculty can discuss with their departments, or maybe even the college administration.

This just goes to show that you never know what kind of information the data can provide, what kind of conclusions it may help you draw.

ILL Fiscal Year Statistics Template

| BOOKS (LENDING) JULY 2015-JUNE 2016 | | | | | | | | | | | | |
JULY	AUGUST	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APRIL	MAY	JUNE	TOTAL
Filled	134	112	125	114	81	42	94	119	119	102	90	104	1,236
Unfilled	154	235	393	245	187	83	265	240	214	174	130	154	2,474

| ARTICLES (LENDING) JULY 2015-JUNE 2016 | | | | | | | | | | | | |
	JULY	AUGUST	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APRIL	MAY	JUNE	TOTAL
FILLED	38	15	77	80	66	22	32	82	75	49	37	36	609
UNFILLED	16	14	21	40	29	19	18	28	48	32	19	25	309

TOTAL FILLED REQUESTS

	Books	Articles
Borrowing	1,083	455
Lending	1,236	609
Total	2,319	1,064

TOTAL UNFILLED REQUESTS

	Books	Articles
Borrowing	931	276
Lending	2,474	309
Total	3,405	585

TOTAL TRANSACTIONS JULY 2015-JUNE 2016 =

	July	August	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Total
Articles	85	41	172	218	133	87	63	197	243	202	102	105	1,648
Books	436	453	729	587	448	192	562	583	510	432	391	400	5,723
Open Access	1	1	0	2	1	1	0	0	0	1	0	0	7
I-Share	9	10	17	24	31	4	10	30	27	21	14	13	210
Items at COD	8	3	19	34	5	7	6	23	5	20	5	9	144
Courtesy Returns	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
Total	539	508	937	865	618	291	641	833	785	676	512	1039	8,244

TOTAL ACTIVITIES FOR FISCAL YEAR 2015-2016= 8,244

The lending side doesn't offer as much detail, which is to be expected when most of the information is gathered from the borrower.

Graphs can also be created to assist in the presentation of the lender side as well.

We created an ILL fiscal year statistics template for this file so that every year the numbers just need to be entered into the initial chart, then letting the excel program do the rest.
The numbers as presented in this file give a complete picture for library administration.

Sample: ILL Fee Management Lender Report

OCLC also keeps 2 purchasing reports. These are straight finance reports.

One is the WorldShare ILL Purchase Request concerning vendors, and the other, pictured here, is the ILL fee management lender report.

A library that has set up an IFM account allows a charging library to automatically pull the fee out of the account. With this report you can see which libraries are charging, and possibly look for alternate candidates when searching for an item.

Also, many libraries allow direct requests so this will also help when reviewing the libraries made available for these direct requests.

The two financial reports are useful wherever the topic is budgeting.

Copyright Compliance

OCLC Number	ISSN	Serial Title	Copyright Compliance	Year	Volume	Issue	Pages	Article Title	Library Type	Ill Record Number	Lender Filled Date	Lender Symbol	Lender Full Name
181819747	0022-3050	JOURNAL OF NEUROLOGY, NEUROSURGERY AND PSYCHIATRY.	US_		85	2014	1253-59	RISK FACTORS FOR CONGENITAL HYDROCEPHALUS: A NATIONWIDE, REGISTER-BASED, COHORT STUDY JOURNAL OF NEUROLOGY, NEUROSURGERY AND PSYCHIATRY.	Academic	171978044	2016-10-03	IAY	UNIV OF ILLINOIS, CHICAGO
576157937	0003-4878	ANNALS OF OCCUPATIONAL HYGIENE.	US_		59	2015 OCT	1058-73	CHARACTERIZATION OF TEXTILES USED IN CHEFS' UNIFORMS FOR PROTECTION AGAINST THERMAL HAZARDS ENCOUNTERED IN THE KITCHEN ENVIRONMENT: ANNALS OF OCCUPATIONAL HYGIE	Academic	171990788	2016-10-03	IAY	UNIV OF ILLINOIS, CHICAGO
755080536		THE NORTON ANTHOLOGY OF AMERICAN LITERATURE	US_					THE NORTON ANTHOLOGY OF AMERICAN LITERATURE	Academic	171992600	2016-10-04	IJE	UNIV OF EVANSVILLE
746942649	0301-5629	ULTRASOUND IN MEDICINE & BIOLOGY.	US_		42	SEPTEMBER 2016	2315-2322	COMPUTER-AIDED DIAGNOSIS OF DIFFERENT ROTATOR CUFF LESIONS USING SHOULDER MUSCULOSKELETAL ULTRASOUND ULTRASOUND IN MEDICINE & BIOLOGY.	Academic	172001718	2016-10-03	IAX	UNIV OF ILLINOIS, CHICAGO
4013828	0141-9870	ETHNIC AND RACIAL STUDIES.	US_		39	20161020	2316-2324	INTRODUCING STRANGERS: TOWARDS A TRANSATLANTIC COMPARATIVE RESEARCH AGENDA ON MIGRANT INTEGRATION? ETHNIC AND RACIAL STUDIES.	Academic	172012338	2016-10-04	IAL	LOYOLA UNIV OF CHICAGO
1397426	0098-1583	RAILWAY ELECTRICAL ENGINEER.	US_		24	1933	251-64	TEXAS & PACIFIC LIGHTWEIGHT TRAIN RAILWAY ELECTRICAL ENGINEER.	Academic	172091858	2016-10-04	INU	NORTHWESTERN UNIV
44054105	1460-4527	ONLINE INFORMATION REVIEW.	US_		40	2016 02 08	6-24	INFORMING BRAND MESSAGING STRATEGIES VIA SOCIAL MEDIA ANALYTICS ONLINE INFORMATION REVIEW.	Academic	172120636	2016-10-05	IAL	LOYOLA UNIV OF CHICAGO
664660604		MISS PEREGRINE'S HOME FOR PECULIAR CHILDREN	US_					MISS PEREGRINE'S HOME FOR PECULIAR CHILDREN	Junior, Community, Technical Colleges	172136704	2016-10-05	IVG	SAUK VALLEY COMMUN COL
619654069		SIMPSON : THE TURBULENT LIFE OF A MEDICAL PIONEER	US_					SIMPSON : THE TURBULENT LIFE OF A MEDICAL PIONEER	Academic	172164852	2016-10-06	ABC	UNIV OF ALABAMA, BIRMINGHAM

The last report I want to mention is copyright compliance.

OCLC does track the journals with publication dates for the sake of copyright compliance but it does not produce an automatic stop when the limit has been reached,
 nor does it tally the articles from each issue.

However, it is useful for those libraries allowing direct requests, as an aid to staying within regulations.

Journal Copyright

Title	2012	2013	2014	2015	2016	Total
Abdominal imagine				1		
Academic emergency medicine					2	
Addiction				1		
Addiction research & theory						
Alcoholism, clinical and experimental research	1					
America art review				1		
American journal of art therapy						
American journal of bioethics					1	
American journal of community psychology				1		
American journal of gastroenterology		1				
American journal of industrial medicine		1				
American journal of men's health				1		
American journal of nursing (AJN)				1		
American journal of physical medicine & rehabilitation					1	

We always keep an excel file to track article requests published in the last five years. This way we can see at a glance when we have reached the limit.

This file could be helpful when speaking of journal collection development. We can see if a journal is often sought after and let the development committee know. Or maybe it is a journal we have as an online version with an embargo. Maybe we need to consider subscribing to the print version so students have immediate access to the articles they need.

I have to say, though, most often it is a single one time request so would not be an argument for procuring the journal. Rather it supports investment in interlibrary loan and support programs intended to increase workflow and request management. Programs such as ILLiad.

And with that I pass on to Amy LeFager.

ILLiad Statistics

ATLAS SYSTEMS
Library Excellence Through Efficiency

PRODUCTS | SERVICES | ILLIAD CONFERENCE | TRAINING | DOCUMENTATION | SUPPORT | ABOUT

ILLiad 8.7 Home > Reports and Statistics > ILLiad Web Reports

ILLiad Web Reports
updated by Caitlin Ankney (Jan 12, 2015)

- Home
- Release Notes
- Downloads
- User Guides
- Video Training
- Addons

- Accessing ILLiad Web Reports
- Using ILLiad Web Reports
- Administrative Web Reports
- Borrowing Web Reports
- Document Delivery Web Reports
- Lending Web Reports

https://prometheus.atlas-sys.com/display/illiad/ILLiad+Web+Reports

Thank you, Marcella.

I wanted to share with you all the link to the ILLiad Web Reports page from the Atlas Systems website, which has detailed information about the reports available to you from ILLiad.

I am by no means and ILLiad expert, but I did want to share with you some ways to use the data available in order to create visual representations of that data.

Web reports link:
https://nlu.illiad.oclc.org/ILLiad/WebReports/Login.aspx?ReturnUrl=%2filliad%2fwebreports

Sample Workflows for OCLC Lending

- Single, Generic, Interlibrary Loan "Patron" Account
- Monthly, Generic, Interlibrary-Loan Patron Records, January-December
- Multiple Patron Records, One For Each Borrowing Library
- I-Share Libraries Only: Multiple Patron Records and CARLI-maintained ILLINET Records
- I-Share Libraries Only: Generic Interlibrary Loan Patron Records and CARLI-Maintained ILLINET Records

2015 Annual Project for the CARLI Resource Sharing Committee
https://www.carli.illinois.edu/products-services/i-share/circ/OCLCLendingWorkflows

At the beginning of this webinar Marcella discussed some ideas for ways to use interlibrary loan data to demonstrate the work of the department, as well as to connect data to a bigger picture. I didn't want to repeat everything Marcella discussed, so I wanted to share work done by the CARLI Resource Sharing Committee that is relevant to lending returnables via OCLC interlibrary loan, either via WorldShare or ILLiad.

The 2015 Annual Project for the CARLI Resource Sharing Committee was to create a webpage that provided information to help libraries process returnables lent via OCLC interlibrary loan in their local integrated library system.

The Sample Workflows for OCLC Lending provides examples for how to process returnables in a local ILS system with pros and cons for the different scenarios.

While this webpage does not cover statistics for OCLC, I did want to make sure to mention this resource since it is related to the processing of materials for OCLC interlibrary loan.

Accessing ILLiad Web Reports
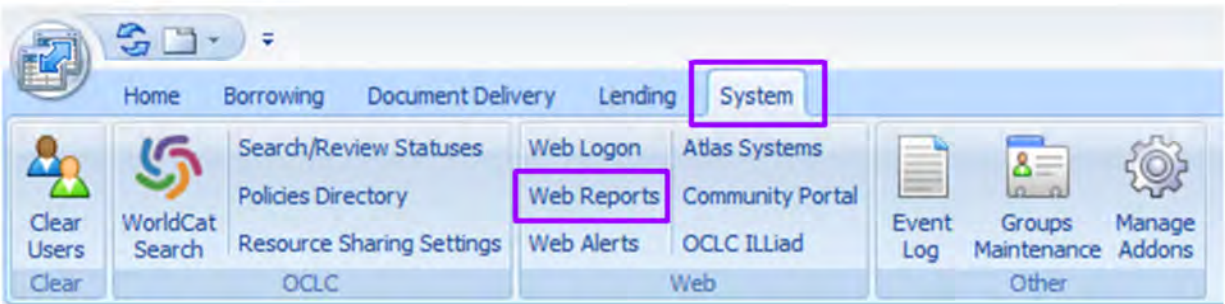
I'm sure many of you are familiar with this step, but I want to make it clear where I go to access the ILLiad Web Reports.
In order to access reports of data for ILLiad click on the System Ribbon in ILLiad, and then click the Web Reports link

Once the web reports page is open you can also save the website address to access the Web Reports without having to first open the ILLiad system.

ILLiad Web Report Areas

Borrowing Reports

Lending Reports

Document Delivery Reports

Administrative Reports

ILLiad web reports are divided into four different areas.

On the following slides I have listed all of the reports available on the Borrowing, Lending, and Document Delivery pages.

Borrowing Reports

Fill Rate Statistics	Requests Finished
Most Requested Journals	Requests Finished and Cancelled
Most Requested Loans	Turnaround Time
Registered Users by Department	Electronic Delivery Turnaround Time
Requests Received by Day	Delivery Time Distribution
Requests Sent by Day	Who We Borrow From
Requests Sent by Hour	Journals Received
Requests by Department	WorldCat Information
Requests by Department and User Status	

These are all of the available Borrowing web reports in ILLiad.

I obviously do not have time to cover all of these reports in the webinar today, so I will be focusing the Fill Rate Statistics and Requests Received by Day for Borrowing, Lending, and Document Delivery.

The Fill Rate Statistics lists all items received within the specified date range and their current status.

The Requests Received by Day shows the number of requests received each day of the specified time period, and this data can be easily manipulated to determine the requests received by month.

In addition the reports I will be covering in more depth, I also want to point out that the Most Requested Journals and Most Requested Loans reports are excellent tools for collection development. My library has subscribed to several e-journals based on the ILLiad data from the Most Requested Journals report.

Lending Reports

Fill Rate Statistics

Who We Lend To

Requests Received by Day

Requests Received by System ID

Requests Filled by Day

Requests Filled and Unfilled

Most Loaned Journals

Most Loaned Monographs

Most Unfilled Journals

Turnaround Time

Requests From Lending Web Page

IFM Charges

These are the Lending Reports that are available.

In addition to the Fill Rate Statistics and Requests Received by Day, I will also show the report of Most Loaned Journals.

Document Delivery

Fill Rate Statistics

Most Filled Journals

Requests Received by Day

Requests Filled by Day

Turnaround Time

Elec Del Turnaround Time

Requests by Department and User Status

Reasons for Cancellation

Requests Finished and Cancelled

These are the Document Delivery Reports that are available.

We fill requests for articles available in our print journal using ILLiad Document Delivery. We are a multi-campus location, and it all of the print journals are housed at the Wheeling campus.

Most Loaned Journals - FY2013-FY2016

OCLC Number	Journal Name	Number of Requests
31905632	School Nurse News	175
17701096	The NAMTA Journal	124
7530248	Educational Psychology	83
2714667	Educational Studies	59
10259540	Teaching and Teacher Education	50
16264653	The Clinical Neuropsychologist	48
4965018	Personality and Individual Differe	48
3661773	The Journal of Clinical Psychiatry	44
10746756	Computers in Human Behavior	38
1713610	Neurology	35
13755428	Journal of Education Policy	34

Before I move into comparing data from Borrowing, Lending, and Document Delivery I wanted to show the Most Loaned Journals report.

The Most Loaned Journals report available from the Lending page is an excellent tool when determining whether or not to maintain the print journal in your collection.
This report shows the most loaned journals for the past three fiscal years.

As I'm sure many of you can relate, it can be a challenge finding current articles from journals, because many electronic subscriptions have an embargo, and fewer libraries purchase print journals because the electronic access to articles is the format preferred by most patrons.

Using this report you could make the case for keeping School Nurse News in the print journal collection, because we have loaned articles from this journal 175 times in the last three years.

This is just one example of the item specific data that you can get from ILLiad to help with collection development decisions.
Similar reports for Borrowing and Document Delivery are also useful in both book and journal collection development.

Fill Rate Statistics

Requests Submitted and Filled via ILLiad FY2016			
ILL Type and Status	**Articles**	**Loans**	**Total**
Borrowing Submitted	1151	254	1405
Borrowing Filled	763	98	861
Lending Submitted	1777	865	2642
Lending Filled	752	329	1081
Document Delivery Submitted	147	0	147
Document Delivery Filled	147	0	147
Requests Submitted	**3075**	**1119**	**4194**
Requests Filled	**1662**	**427**	**2089**

When you run the Fill Rate Statistics each area of ILLiad a separate report is generated for Borrowing, Lending, and Document Delivery.

Taking the Fill Rate Statistics for those three areas you can then put that data into one Excel spreadsheet in order to generate graphical displays of the data.
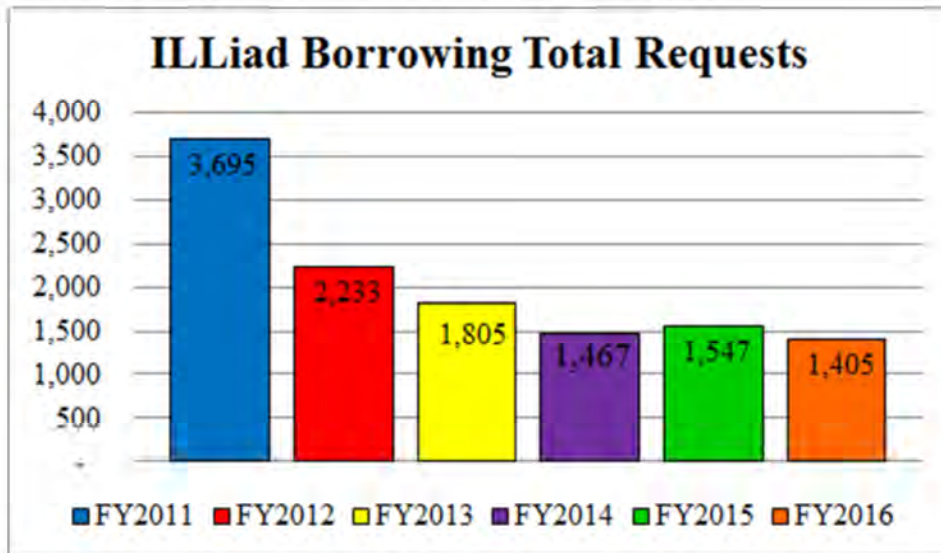
Using Fill Rate Statistics
Requests Submitted and Filled

ILLiad Requests Submitted and Filled FY2016
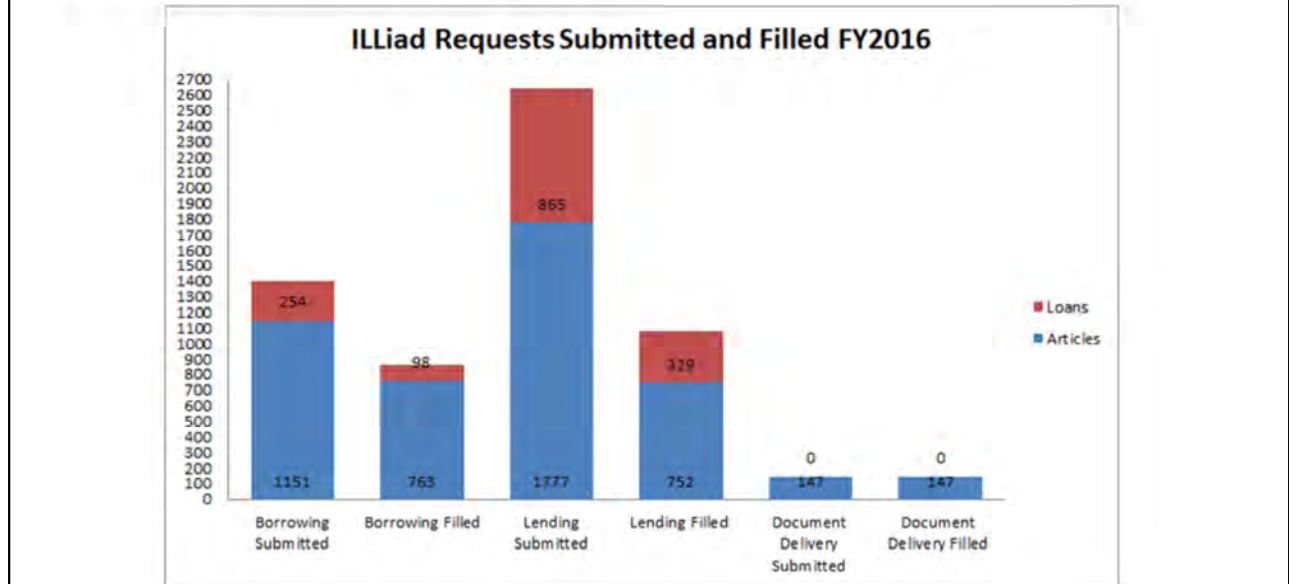
This graph is a visual representation of the spreadsheet that you saw on the previous slide.

This is a much more interesting way to communicate the ILLiad Interlibrary Loan Requests submitted and filled for a fiscal year.
It is also easy to visually differentiate requests as articles or loans using the stacked bar graph.

Using Fill Rate Statistics
Fiscal Year Comparison for Borrowing Requests

You can also use the Fill Rate Statistics to show the trend of requests placed over time.

This report shows the total number of borrowing requestes submitted via ILLiad from FY2011 to FY2016.

As you can easily see there was a significant drop from FY2011 to FY2012; however, the requests have remained stable for the past three fiscal years.

Requests Received by Day - Lending

Date	Article Requests Received	Loan Requests Received	Total Requests Received	Total	Month
7/1/2015	4	2	6		
7/2/2015	3	7	10		
7/3/2015	1	0	1		
7/6/2015	6	4	10		
7/7/2015	2	5	7		
7/8/2015	6	3	9		
7/9/2015	1	4	5		
7/10/2015	1	0	1		
7/13/2015	7	4	11		
7/14/2015	4	1	5		
7/15/2015	1	3	4		
7/16/2015	4	6	10		
7/17/2015	2	2	4		
7/18/2015	1	0	1		
7/20/2015	5	2	7		
7/21/2015	2	2	4		
7/22/2015	4	3	7		
7/23/2015	6	1	7		
7/24/2015	1	0	1		
7/27/2015	2	4	6		
7/28/2015	0	5	5		
7/29/2015	4	4	8		
7/30/2015	6	3	9		
7/31/2015	4	4	8	146	Jul-15
8/2/2015	0	2	2		

The Requests Received by Day report can easily provide you the total number of requests you received by month by using the SUM formula in Excel.
This report is showing the requests received by day for ILLiad Lending.

I have added columns E and F in order to easily calculate the total number of requests received for July 2015.

Using Requests Received by Day
Lending Monthly Requests

Lending Requests Received by Month FY2016

Month	Total Requests
Jul-15	146
Aug-15	132
Sep-15	205
Oct-15	214
Nov-15	164
Dec-15	71
Jan-16	194
Feb-16	184
Mar-16	252
Apr-16	441
May-16	338
Jun-16	301
Total	2642

Once you calculate the daily requests into monthly totals, you can easily create a spreadsheet of the fiscal year data in order to generate monthly usage trends for the year.

Using Requests Received by Day
Fiscal Year Comparison of Monthly Lending Requests
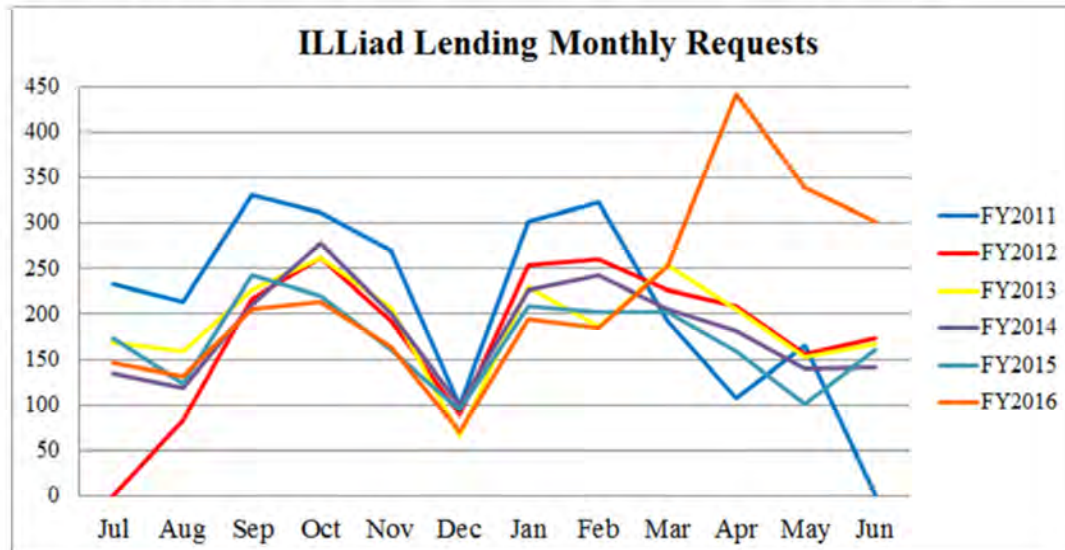
This graph shows the Lending Requests that we received for the past 6 fiscal years.

This also helps visually demonstrate peak times of usage.

One interesting thing I observed was the extreme peak in lending requests for spring 2016.

I'm still investigating the cause, but I think the first step will be to analyze the article holdings in WorldCat to determine their accuracy.

Comparing Data with Other Resource Sharing Data

ILL Requests Received by Month

Legend: Borrowing - ILLiad, Lending - ILLiad, Document Delivery, Borrowing - I-Share, Lending - I-Share
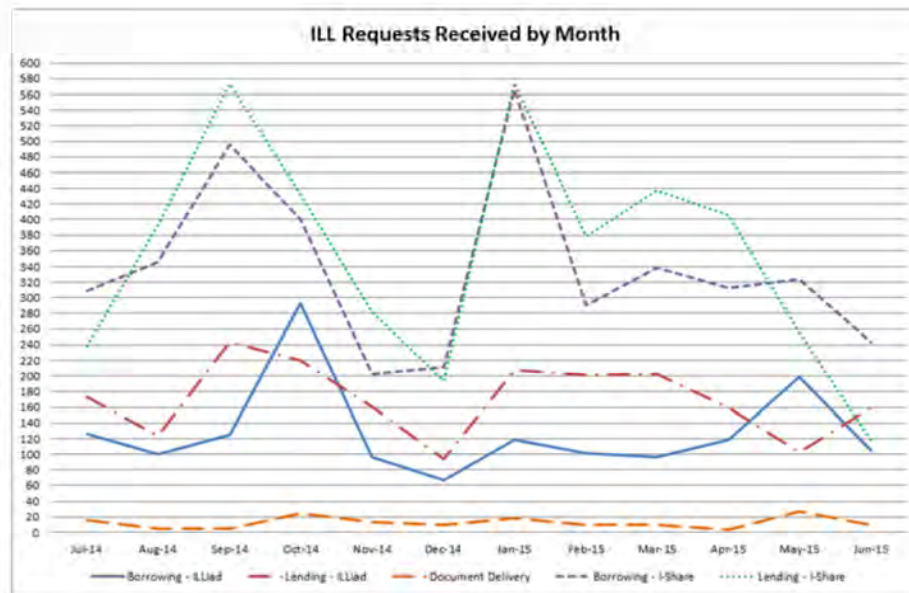
It is important when reporting on interlibrary loan and resource sharing to clearly and completely document the work done by your department.

By combining monthly requests for all three ILLiad areas, as well as the borrowing and lending we do as part of the I-Share system, I am able to demonstrate several different tables of data with one visual graph.

Administrative Reports

Copyright

Borrowing Invoices Received

Lending Library

Customers Cleared

Outstanding Requests

Requests by Username

Staff Activity by Username

In the Administrative Reports for ILLiad I wanted to highlight two reports.

Outstanding Requests lists all borrowing requests that are at a status of Request Sent for more than the number of days that you specify. The default is 5 days.
This allows you to check on the status of those requests to make sure they are still in process at a lending library.

Requests by Username lists all borrowing requests submitted by patrons within the specified date range.
This only counts requests submitted by patrons and does not differentiate between those filled or cancelled.

Outstanding Requests

Administrative - Outstanding Requests

Generated	10/27/2016 1:35:19 PM
Number of Days at Request Sent	5
Sites	All

Export Options

Exporting to Microsoft Excel creates a multi-sheet workbook for this report with parameters, graphs (if applicable) and grids of all data. Any grouping or sorting you do before clicking export will change the display of the data in Excel.

[Export To Microsoft Excel]

Drag a column header here to group by that column

Transaction Number	ESP Number	ILL Number	Transaction Date	Lending String	System ID	Request Type
46843	1566776	154631971	9/28/2015	*UAF,GZC,TPN,ANG,TPA	OCLC	Article
48139	24758374	163183698	1/22/2016	*CFI,CLO,CSA,CNO,FGM	OCLC	Article
49224	32573931	165979072	4/13/2016	*TTS,ZF3,AZU,OIP,TTS	OCLC	Article
49378	4115808	166178489	4/20/2016	*IAG,ICJ,Y4Z,HRM,GKJ,GPM	OCLC	Article
49407	33146479	166178727	4/21/2016	FHM,MOU,*ORZ,TTS,U@S	OCLC	Article
49718	11324823	166770477	5/13/2016	*TWH,TXR,TLS,TXF,IEA	OCLC	Article
50179	7754472	167459464	6/17/2016	*AMH,MBB,WPG,MEU,EZC	OCLC	Article
50446	26024532	168313800	7/11/2016	*CFI,CTN,IMC,LNU,BWC	OCLC	Article
51347	70121028	171415688	9/21/2016	*TTS	OCLC	Article

The Outstanding Requests report is a useful report to run in order to ensure that a borrowing request does not sit in Sent status for too long. Often this means that there was an issue in receiving the requested item, and the request needs to be followed up on.

True confession, I discovered this report in preparing for this webinar, so I was a little shocked to see a request that was still outstanding from over a year ago.

Needless to say this was a good discovery, and I will now be checking this report monthly to make sure outstanding requests are cleared regularly.
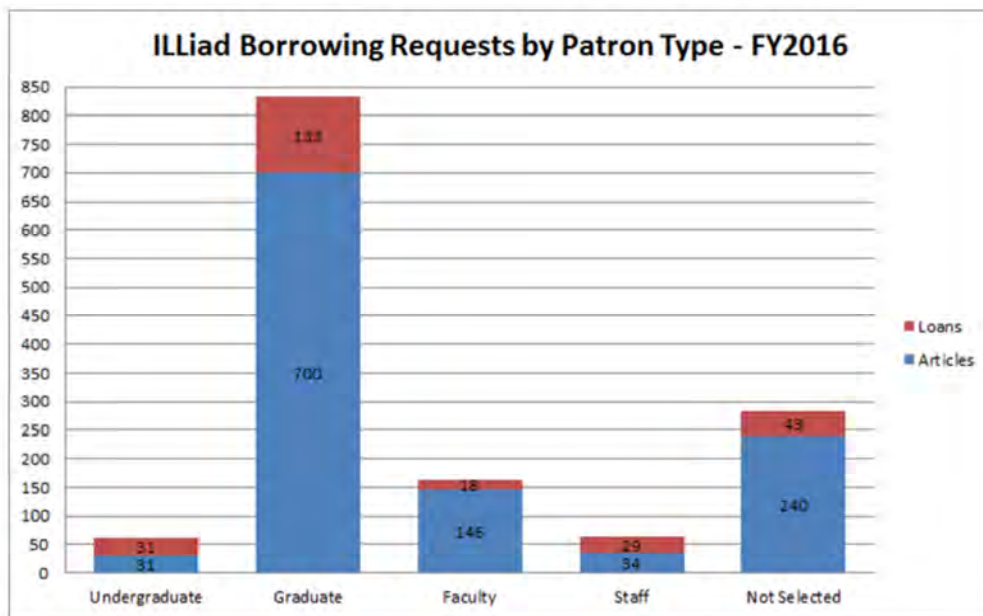
Requests by Username

Username	Last Name	First Name	Department	Status	Article Requests Received	Loan Requests Received	Total Requests Received
			Arts and Sciences	Faculty	94	4	98
			Arts and Sciences	Graduate	16	0	16
			Education	Graduate	12	0	12
			Other - Unlisted	Graduate	9	3	12
			Arts and Sciences	Graduate	9	0	9

When you export the Requests by Username report to Excel the column filters are already applied. I have removed any identifying information from patrons that would ordinarily appear in the Username, Last Name, and First Name columns.
This allows you to easily filter your data by patron type, or in this example by total number of requests received.

This report was only for the month of October, so it made my borrowing staff feel better when I confirmed that one faculty member had placed almost 100 requests during the month.

Using Requests by Username Report

ILLiad Borrowing Requests by Patron Type - FY2016

Using the data from the Requests by Username Report, I'm not only able to identify the total number of requests, but I can also differentiate the requests as either articles, in blue, or loans, in red.

This report compares all of the requests placed by patron type for the fiscal year. Not surprisingly our graduate students requested the most, but we also have a large number of patrons that did not identify a patron type. This is something that I plan on looking into to see if we can update those patron records without an identified patron type in order to have more accurate reporting.

This is a more in-depth look at the type of requests placed, that you do not get from the Requests by Department and User Status report from the Borrowing Reports page.

Creating Your Own Reports
Examples of Custom Access Queries

Jen Stegen
Interlibrary Loan Librarian
Loyola University

Data is obtained from ILLiad using a SQL server
- Worked with IT at Loyola in order to set up
- Complex to set up - You have to create an ODBC link to the ILLiad database
- Additional layer of complication with hosted ILLiad sites

Queries

Search...

- BoundJournalProject
- CitedIn
- DocDel
- Forwarded to ICL
- HS-Lending
- ILL by Call No.
- JournalRequests
- Law-Borrowing
- Law-Lending
- Lewis ILL Lending
- LSF Lending
- NOS
- POD

Jen Stegen is a member of the CARLI Resource Sharing Committee and she is the Interlibrary Loan Librarian at Loyola University.
She provided the information for this section of the webinar, and she has shared some of the custom reports that she runs in Access using ILLiad data.
Jen is monitoring chat, so if you have questions during this section please put them in chat. She will do a much better job answering them than I will.

Jen worked with the IT department at Loyola in order to set up the SQL server to allow her to create custom queries for ILLiad data.
This process is complex to set up. You have to set up an Open Database Connectivity, or ODBC, link to the ILLiad database.

Loyola is a self-hosted ILLiad site, and there is an additional layer of complication with hosted ILLiad sites in setting up this type of custom reporting.
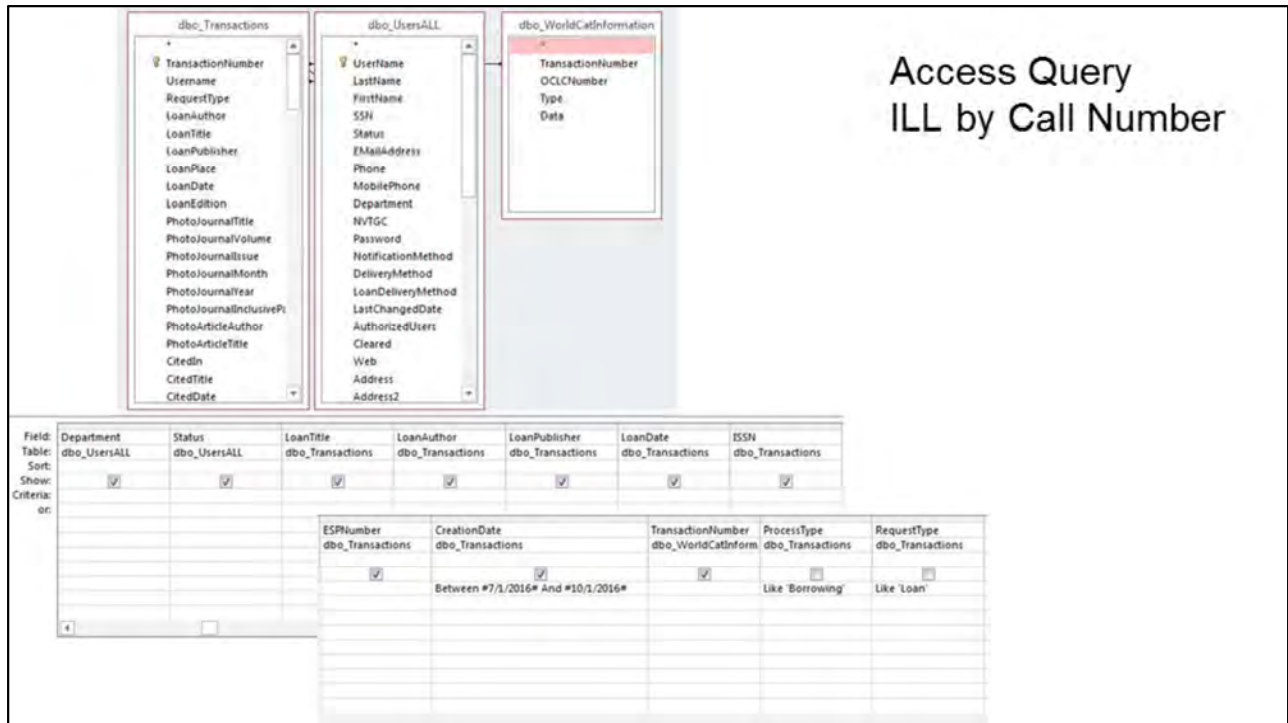
Jen uses Access 2013, and her Access Query to generate the ILL by Call Number report.

Jen runs this report quarterly

ILL by Call Number Report

ILL by Call Number 4thQ

	A	B	C	D	E	F	G	H	I	J
Title	Author	Pub Dat	Imprint	Form	OCLC Number	LC Call Number	Language	ISBN	Patron Status
GRAND ISLAND FARMSTEADS.	UNITED STATES. FARM SECURITY ADMINISTRATION.	19UU	WASHINGTON : FARM SECURITY ADMINISTRATION, 19--	Book	864625152	1.95 F11 19UU	ENG		GRADUATE
MUSEUMS AND SOCIAL ACTIVISM : ENGAGED PROTEST /	MESSAGE, KYLIE.	2014		Book	843124206	AM7 .M466 2014	ENG	9780415658522	GRADUATE
LOSING WITH EXCELLENCE : LEADERSHIP TRAINING OF WEIGHT WATCHERS	SHAUGHNESSY-LAU, HONORE ANNE.	1987	1987	Book	17782673	AS36 1987 .S52X	ENG		GRADUATE
STUDIES IN THE HISTORY OF THE JEWS IN OLD POLAND : IN HONOR OF JACOB GOLDBERG /	GOLDBERG, JACOB, 1924-2011.	1998	JERUSALEM : MAGNES PRESS, HEBREW UNIVERSITY : 1998.	Book	41176793	AS591.J4 A25 VOL. 38	ENG		STAFF
EVENT : A PHILOSOPHICAL JOURNEY THROUGH A CONCEPT /	ZIZEK, SLAVOJ.	2014		Book	870285314	B105.E7 Z59 2014	ENG	9781612194110	GRADUATE
ON VIOLENCE : A READER /	LAWRENCE, BRUCE B. 1968-	2007	DURHAM NC : DUKE UNIVERSITY PRESS, 2007.	Book	124538873	B105.V5 O5 2007	ENG	9780822337560	FACULTY

This data is used to show titles being requested through interlibrary loan. It can be arranged/filtered by a variety of ways, for example, patron status, department, or call number
This data is used by Interlibrary loan, subject specialists, and administration

This report uses the custom searching in ILLiad, so any field can have a report generated

Jen uses this as a backup for tracking items charged via ILLiad

The Purchase on Demand Access Query is used to provide a list of all titles purchased for the collection through the Purchase on Demand service.

Purchase on Demand

Purchase On Demand 4thQ FY16

Department	Title	Author	ISBN	Pub Date	Reason For Cancellation	Creation Date
Other - Unlisted	Anthology of world scriptures	Van Voorst, Robert E	9781133934448	2013	Purchase on Demand	10-May-16
Other - Unlisted	Jesus and Muhammad	Gabriel, Mark A	9781591852919	2004	Purchase on Demand	05-May-16
Other - Unlisted	Buddhism and political theory	Moore, Matthew J	9780190465513	2016	Purchase on Demand	09-May-16
Education: Teacher Preparation	Common core standards in diverse classrooms : essential practices for developing academic language and disciplinary literacy /	Zwiers, O'hara, Pritchard	1625310099 (electron	2014.	Purchase on Demand	06-Apr-16
Education: Teacher Preparation	Inspiration and innovation in teaching and teacher education	Goodnough, K., Galway, G., Badenhorst, C., & Kelly, R.		2013	Purchase on Demand	10-Apr-16
Education: Teacher Preparation	The skin that we speak	Delpit & Dowdy		2008	Purchase on Demand	16-Apr-16

This service is available only to faculty at Loyola, and all requests are filtered to a Purchase on Demand custom queue
The option on the request form to recommend if they want the book to be purchased is defaulted to yes
All the requests are processed by Jen.

Requests are submitted through ILLiad and if the request meets the criteria of being published in the last 15 Years and available via Amazon Prime at a reasonable price, then it is then purchased for the permanent collection.

The service provides great PR for the library and it also helps fill in gaps in the collection.

This data is used by subject specialists, acquisitions, cataloging, interlibrary loan, administration, and faculty

Document Delivery

Document Delivery Statistics

Sep-16	Item Location						
Pickup Location	Cudahy	Lewis	LSF	Law	H.S.	Online	Total
Cudahy	88	15	10	2	0	0	115
Lewis	10	31	4	0	0	0	45
Law	0	0	0	N/A	N/A	N/A	0
Health Sciences	2	N/A	0	N/A	N/A	N/A	2
Cohort	0	3	0	0	0	0	3
Total	100	49	14	2	0	0	165

Mailed to COHORT: 43

ERIC Documents: 0

Loyola Libraries have 4 campus locations, and there is intercampus delivery of items. Staff and Student Workersare pulling and scanning material at all locations

The Main Library, Downtown Library, and Law Library all maintain print journal collections. The Health Sciences library uses electronic delivery only.

This report shows the monthly statistics by location for September 2016.
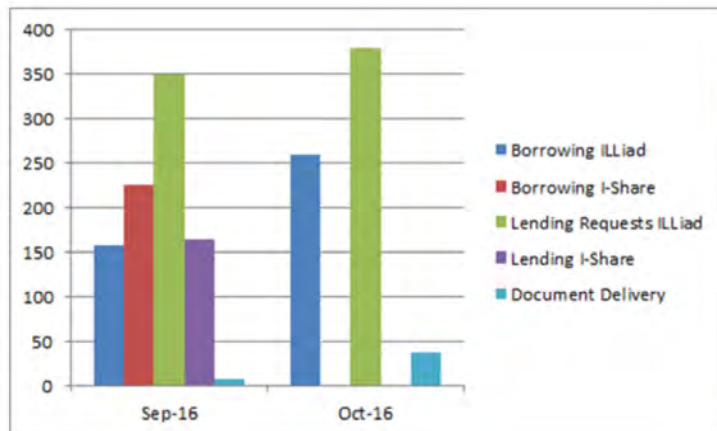
Marcella and I hope that you found information in this presentation useful, and that we have given you some ideas for ways to use your WorldShare or ILLiad data in the future.

When presenting data it is important to help paint a picture of the story the data is telling. By visually representing data it makes it easier to explain staff time to stakeholders that may not understand how interlibrary loan works.

NLU is on the quarter system, so our term began in September. From September to October my two staff processed 645 total borrowing requests and 939 lending and document delivery requests. This data does not include Borrowing and Lending for I-Share for October, because that data is not available until the 15th of the following month.

I wanted to take a snapshot of what I found to be the busiest two month period for interlibrary loan at my institution, and present that alongside pictures of how my staff and I decorated the library space at Wheeling to create a fun learning environment for Halloween.

This can help people connect the number or requests submitted to the staff that process all of those requests, and can help illustrate that even during a busy time for interlibrary loan the staff still was able to work together creatively to enhance the library space.

Questions?

WorldShare Interlibrary Loan - OCLC Support & Training:
https://www.oclc.org/support/services/worldshare-ill.en.html

ILLiad Web Reports Guide - Atlas Systems:
https://prometheus.atlas-sys.com/display/illiad/ILLiad+Web+Reports

Share Ideas:
Resource Sharing Interest Group Listserv: resshare-ig@carli.illinois.edu

Image Credit:
Damián Navas "question mark"
https://flic.kr/p/9ksxQa

If you have any questions please type them in chat and we will do our best to answer them.

We have provided links to the support pages for WorldShare and ILLiad.

If you are doing anything interesting with WorldShare or ILLiad data that we did not discuss today, please feel free to share your expertise on the CARLI Resource Sharing Interest Group listserv

Ask if no one is posting questions: Is there anything that you were hoping would be covered today that was not discussed?