Amy
Welcome to the Resource Sharing Statistics: Navigating the Numbers, Harnessing the Data webinar.
This presentation will focus on the data provided by CARLI available to I-Share libraries.
Introduction - Amy then Marcella
Amy (after we introduce ourselves)
We are the co-chairs of the CARLI Resource Sharing Committee.
While we are not statisticians, we thought it would be helpful to share how we utilize I-Share statistics in our own libraries to see if.
Poll Question:

How do you use I-Share data now?

Amy
Before we begin the presentation we want to get an idea of how you are using I-Share data now. You can choose multiple responses.

*Talk about poll results as they are showing up*
Amy
Now that we have an idea of how you use I-Share data now, we are going to talk about the different ways you can obtain I-Share data from CARLI.
I-Share statistics can be gathered through 4 primary methodologies:

Files uploaded to the library’s CARLI FTP account
Transferring Data Files to and from the CARLI Servers using Secure FTP
https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/SSHSecureShell
What's in my FTP Directory?
https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/InFTP

CARLI Web Reports Beta
Background and Overview
https://www.carli.illinois.edu/products-services/i-share/reports/web-reports
Login
https://web-reports.carli.illinois.edu/login/

Voyager Access Reporting
Running & Creating Reports
https://www.carli.illinois.edu/products-services/i-share/reports

Contacting CARLI Support
Email support@carli.illinois.edu

Amy
You can obtain I-Share statistics in four different ways.
Files are uploaded to your library’s CARLI FTP account.
CARLI has created special reports that are not part of what is uploaded into your FTP account available on the CARLI Web Reports Beta website.
You can run your own reports using Access.
You can contact CARLI directly to run reports that are not available.
The first method of obtaining statistics that we will discuss are the files that are uploaded to your library's CARLI FTP account.
Annual Statistics for Individual I-Share Libraries
Provided by CARLI

**Collection Analysis:** provide a snapshot of your collection at the time the statistic was created.

**Circulation Activity:** detail circulation activity at all circulation locations at your institution, including call slip fill rates.

**Universal Borrowing Activity:** detail circulation activity where the Item and Patron are from different libraries.

**Acquisitions and Serials:** track purchase order reports and expenditure reports.

Report descriptions: [https://www.carli.illinois.edu/products-services/i-share/stats/statspck](https://www.carli.illinois.edu/products-services/i-share/stats/statspck)

Amy
CARLI provides statistics specific to your library that are uploaded annually to your FTP account at the end of the fiscal year.
Annual reports can be run on different time ranges if your library operates on a calendar year rather than a fiscal year time frame.
CARLI also provides some statistics related to Universal Borrowing on a monthly basis.
We will be discussing the reports that provide data relevant to resource sharing that come from circulation activity and universal borrowing activity
CARLI UB Stats Uploaded Monthly to FTP Account

UB Stat 1 & 2: ubstat_1_and_2_xxx_yymm.rpt
Counts items that your patrons have borrowed from other I-Share libraries, and that your library has loaned to other libraries.

UB Stat 3: ubstat_3_xxx_mmmyy_for_import.txt
Lists the titles of items borrowed by your patrons from other I-Share libraries.

UB Stat 4: ubstat_4_xxx_mmmyy.rpt
I-Share requests placed by your patrons, and I-Share requests placed for your materials.

UB Stat 5: ubstat_5_xxx_mmmyy_for_import.txt
Lists titles that your patrons requested to borrow through I-Share, where the patron's request was unfulfilled.

Marcella
In addition to the annual statistics CARLI uploads to the individual library's FTP account, CARLI also uploads monthly statistics including these universal borrowing statistics.
The report names contain your library code where the XXX is and then the year and month it was run for. Your October report would be loaded into your FTP on November 1st.

Monthly: ubstat_1_and_2.rpt and ubstat_3.rpt; ubstat_3_for_import.txt have been a part of the FTP for some time, although ubstat_3_for_import is a modification of the original FTP file.
Ubstat_4.rpt will now automatically be sent to every library on the 15th of the following month.
And ubstat_5_for_import which has also recently been added comes on the 15th of the following month with the others.

We will go through each one in detail but here a quick description of them.
I and 2 (lending and borrowing respectively) with 2 showing up below the stat 1 list. This compares the numbers to each of the I-Share libraries with stat 1, which is the lending, also including the ILLINET libraries as a group. They are of course missing from stat 2 since you can't borrow from them.
Stat 3 lists all the I-Shared titles, with author publisher, call number and ISBN, as well patron group and when the item was charged.
Stat 4 consists of multiple parts and is from your library’s perspective, so refers to either your patron or your collection. Stat 5 gives much the same information as stat #3 but these are the unfilled requests. Information pertaining to the item, such as call number reflects that of the last library receiving the request.
Marcella
Beginning with ubstat 1 you can see the count of your library’s lending to each I-Share library as well as loans to ILLINET as a group. These are items which did actually get charged out to the patron, so items where the hold has expired do not appear on this list.

This is useful for both Circulation and Reporting.
The annual report you see here is the yearly one but it is available monthly as well.

This not only shows the number of items loaned per library but also breaks it up into on and off site.
It may be of value to see which library’s students actually physically come to your library to check out books.
This may be a sign that they make use of the library in other ways as well. Perhaps that can be useful when reporting to boards or administration to emphasize what the library has to offer besides its general collection, and also signify the positive reputation the library has.
Marcella
Here just a small portion of the UBstat_1 report represented in a bar graph.

You can see that the on-site lending is miniscule. 
But we, for instance, do have a few libraries with patrons who frequent our facility. 
This could be due to convenient location or, as I said, other offerings found in our facility. 
That could be anything from an expansive reference collection or available databases, quiet work areas, and everything in between.

Your own library is always included on the list to keep it consistent for all libraries, but of course, you would not be I-Sharing to yourself.
UB2, which as I mentioned, can be found if you scroll down past the UB1 stats, shows count by library, of items borrowed by your patrons and also checked out. This, meaning that these items were sent to us and subsequently charged out to our patron. This may be useful when choosing which library to borrow from. Instead of clicking on Ist available you can specifically request from libraries with a high success rate.

The same kind of bar graph as for the lending side can also be created for this borrowing report.
With a bit of finessing you can also combine the 2 reports and clearly see lending versus borrowing both for a specific library and overall. Again the onsite numbers appears rather insignificant in most cases.

But here you can see that not only do our patrons do quite a bit of onsite borrowing from Benedictine. We actually do more onsite borrowing than I-Sharing. We may want to delve into the reasons for this. What do they have that we don’t have? It may be something we want to bring up to the board in the end.

This is a small excerpt. If you wanted to include the entire list of libraries the bars become very fine lines.
Here you can see how the bars narrow down to become mere pen lines at this point. But you can still see a good overview of your lending and borrowing traffic.

It’s much quicker here to see that the library does much more lending than borrowing and that certain libraries favor us for borrowing. Obviously in the table you would have to keep looking back at numbers to see this. And it is common knowledge that in today’s world visuals work better, so graphs are usually preferred over tables when presenting data.
Marcella
This ubstat 3 report shows all the borrowed titles that were subsequently checked out by our patrons, listing lending library, charge dates, patron groups, call number, title, publisher, etc.
This is the new UBstat 3 for import shown here, which allows the information be opened directly in an excel file.
And from this report you can then create another report following the directions provided on the CARLI website at the url address shown here.
Marcella

Those easy-to-follow directions help to create another excel file by putting together the ubstat_3_for_import and the Conspectus_Ranges_2009 table.

This new excel file focuses specifically on what is useful to librarians when looking at their subject areas.
Since libraries use different call number systems it may be difficult for librarians easily spot items pertaining to their specific subject area.
So this new report displays the division and category for each book to assist with that.
Using the conditional formatting, items that fall under more than one division or category can be highlighted. Librarians can confer with their colleagues who share certain titles, about these items when discussing budgeting of new acquisitions.

This is very useful for librarians as this report shows the titles your patrons are having to request from I-Share. Of course not every title would be considered for any number of reasons. And it could even be that the library owns the title but it was checked out or is on reserve or what have you.
Marcella
We’re going to skip over ubstat_4 momentarily because ubstat_3 and ubstat_5 are so closely related in the data they provide. Amy will discuss ubstat_4 in detail after this.

The monthly report of borrowing ubstat_5 report Requests unfulfilled is a complement to UB_Stat_3 which lists the filled requests. Stat_5 shows what your patrons have requested through I-Share but were unable to get filled.
This report is also now configured in your FTP as a “for import” into excel file.

With the CARLI website giving the step-by-step instructions for creating this document using the ubstat_5_xxx_mmyy_for_import.txt the same way as for ubstat 3.

This ubstat_5 may be even more important to collection development than the ubstat_3, as these items were unavailable from any I-Share library at all, so may not be part of any consortial library collection.
When considering new acquisitions they should be considered a priority, depending on the title, division and or category of course. This would be for librarians to decide.
The ubstat_4 report is run annually, and as of October the report will be uploaded monthly to your CARLI FTP account on the 15th of the month. The ubstat_4 report is has 3 parts:

4a contains the total number of I-Share requests placed by your patrons as well as the total number of I-Share requests place for your materials

4b shows all of the pickup locations for your patrons’ filled I-Share requests, and can help you see common locations where materials are picked up. At NLU we have 4 different circulation locations because we are a multi-campus university, and this report can help us see which location has the most volume of I-Share requests being picked up.

4c shows all of the number of I-Share call slips received by call slip queue, as well as the total number of those requests that are filled
Amy
This graph shows the monthly trends for FY2016 for I-Share borrowing requests and lending requests. This data was taken from section 4a of the monthly ub_stat_4 report.
By taking the monthly total number of I-Share requests placed by our patrons and for our items and putting those totals into an Excel spreadsheet I was able to generate a graphical representation of these trends. You can easily see, and communicate to others, when you have peak times for either processing incoming I-Share requests, as well as processing call slips for your materials. You can also easily see if you are lending more than you are borrowing.
Amy
My institution has had UB Stat 4 run monthly for several years, so I was able to generate a graph that compares the monthly borrowing trends for the last 6 fiscal years.
If you would like to obtain the monthly UB Stat 4 data for months prior to October 2016 you can contact CARLI to request for the reports to be run and they will be uploaded to your FTP account.

This report shows all of the borrowing requests placed by month from FY2011 to FY2016. This visual representation of the data makes it easy to see that our patrons are placing fewer requests in the last fiscal year. However, the monthly trends show similar peaks in usage in September, January, and April. Since NLU is on the quarter system our fall, winter, and spring terms begin in those months.
Amy
In addition to the Universal Borrowing statistics available in your FTP account there is useful data relevant to resource sharing in some of the annual circulation reports. Circ_Stat_6 provides the circulation by patron group and item type, and this report includes circulation data for UB patrons in addition to the other local patron groups in your system. This example shows just the UB patrons included in the report. In this report UBIN refers to ILLINET Libraries, UBReg are patrons with a standard number of renewals, and UBLong are patrons that have additional renewals beyond the UBReg patrons.
Amy
From the circ_stat_6 report I was able to calculate the total circulation for the different patron types.
From this graph you can easily see that circulation of our materials to UBReg is comparable to the circulation to the individual patron groups of Faculty, Graduate Student, and Undergraduate Students at my institution.
Circ Stat 8: Call Slip Fill Rate
Example file: circ_stat_8_nlu_1507_1606.rpt

Amy
Circ Stat 8 provides data about your institution’s call slip fill rate for the fiscal year.

This report breaks down call slip requests to identify requests placed by your local patrons and requests placed by Universal Borrowing patrons. This report also breaks down the number of call slips placed by the different item types.

If you have multiple circulation locations this report will also enable you to see the call slips placed for each location.

This report can help you identify which item types in your collection have a large number of request, and the percentage of requests that are filled. The Local Fill Rate Column provides the percentage of call slips that are filled; however the percentage is entered as a whole number. I manipulate this data in Excel in order to obtain the total number of call slips placed by local and universal borrowing patrons, as well as the total number of call slips that are filled.

The Circ Stat 8 report can be used in conjunction with Circ Stat 10.
Amy
This is an example of my modified Circ Stat 8 report.

In order to get a clear picture of the local and universal borrowing call slip fill rate I manipulate the data in Circ Stat 8 to see not only the number of requests placed, but to also determine the number of requests that are filled by location.

When I modify the Circ Stat 8 report I convert the Local Fill Rate column to percentages and insert a column to calculate the number of filled call slips.

Once I calculate the the Call Slips filled by individual item type I then total the number of call slips placed and call slips filled for local and universal borrowing patrons.

At my institutions we have four locations with collections, so I calculate the total number of call slip requests placed and filled by each circulation location, and from there I can calculate the total number of call slips placed and filled for my institution.
Amy
This is a graphical display of the total number of call slips placed and filled, and it allows me to compare the number of requests for materials owned by my library placed by my local patrons as well as by patrons from other I-Share libraries.

As you can see from this graph my institution receives more call slips from I-Share patrons than from my local patrons.
Amy
You can use the data in Circ Stat 10 in conjunction with the data in Circ Stat 8 in order to make decisions about the Universal Borrowing lending policies your library has set for the different item types at your library.
The Items column provides the data for the total number of items with the specific item type.
The Item Circ provides the data for the total number of individual items that have circulated for that item type.
And the Total Circ column provides the data for the total number of times items have circulated of that item type.
You can see what your library’s loan policies are for Universal Borrowing.
Using this data you can see if there are item types that have low circulation that may only be available to be borrowed by your local patrons. In order to increase usage you can decide to allow that item type to be requested by patrons from other I-Share libraries.
Using data from Circ Stat 8 you may have identified items that have call slips placed by I-Share patrons, but the requests are not filled by your library. This might mean that you need to update the item to be Local Request Only in order to have more accurate information in the I-Share catalog.
Amy
Once you convert the data provided by CARLI into the different graphs it makes it easy to see trends in your library’s borrowing and lending in I-Share. You can use the visual data to present to administrators. This can help you determine staffing needs as well as justify the cost of I-Share membership because you can clearly and visually demonstrate how much your patrons are borrowing from other I-Share libraries, as well as how much your materials are being borrowed by I-Share library patrons. Making the data visual can help easily show the borrowing and lending trends to administrators that may not be familiar with resource sharing.
Annual Consortial Statistics for I-Share Libraries
Provided by CARLI

Collection Stat 8: provides comparison data for library record counts.

Collection Stat 9: provides comparison data for unique titles within collections.

UB Stat 1: Outgoing ILL FY#: details on-site and remote lending statistics.

UB Stat 2: Incoming ILL FY#: details on-site and remote borrowing statistics.

Borrowing and Lending Comparison FY#: combines the lending and borrowing totals into one chart for easier comparison.

Reports are available: https://www.carli.illinois.edu/products-services/i-share/stats

Amy
In addition to the data uploaded to your FTP account of statistics for your individual library, CARLI also provides borrowing and lending data for the fiscal year for all I-Share libraries. This compares data for all libraries in the I-Share system, so you can compare your library’s data to that of other libraries in the I-Share system. This data is not uploaded to your FTP, but it is available on the CARLI website.
This is a screenshot of the UB Stat 1 Consortial data from FY 2016 that shows all Outgoing ILL for every library in the I-Share system. As you can see this data is different from what is in the UB_Stat_1 file uploaded to your FTP. The UB_Stat_1 file in your FTP provides detailed data for the specific libraries that are borrowing your materials and lending your patrons materials.

The UB_Stat_1 report on the CARLI website provides the total number of items lent either on-site or off-site by each I-Share library.

The UB Stat 2 report on the CARLI website provides the total number of items borrowed either on-site or off-site by each I-Share library.
This example shows the 2016 fiscal year comparison data for all libraries in the I-Share system. This is different than information provided on ubstat_4, because you can also see how your total lending and total borrowing compare to other I-Share libraries. When presenting this information you can consider similar libraries. For example, if you are a community college you can compare your total lending and total borrowing to other community college libraries.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Total Lending</th>
<th>Total Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adler School of Professional Psycholgy (ADL)</td>
<td>708</td>
<td>1596</td>
</tr>
<tr>
<td>Augustana College (AUG)</td>
<td>2068</td>
<td>4164</td>
</tr>
<tr>
<td>Aurora University (ARU)</td>
<td>2000</td>
<td>1447</td>
</tr>
<tr>
<td>Benedictine University (BEN)</td>
<td>1527</td>
<td>2314</td>
</tr>
<tr>
<td>Bradley University (BRA)</td>
<td>4585</td>
<td>2415</td>
</tr>
<tr>
<td>Carl Sandburg College (CSC)</td>
<td>914</td>
<td>346</td>
</tr>
<tr>
<td>Catholic Theological Union (CTU)</td>
<td>2403</td>
<td>771</td>
</tr>
<tr>
<td>Chicago State University (CSU)</td>
<td>911</td>
<td>1489</td>
</tr>
</tbody>
</table>
Amy
Using the data provided by the Consortial Borrowing and Lending Comparison for the past 5 fiscal years I can compare my total borrowing and lending in the I-Share system over time.

As you can see from this graph our lending to I-Share patrons has remained fairly consistent over the past 5 fiscal years; however, there was a significant decrease in borrowing from FY2012 to FY2014.
Amy
This is a bar graph depicting yearly borrowing among I-Share community colleges for the past 4 years. This also happens to show which libraries only came aboard within the last 4 years as you can see the “0” for the years before joining.
You can create a graph like this comparing other I-Share libraries that are similar to your own to see how your borrowing and lending compares to similar institutions.
This data could be useful in budgeting discussions to support the spending of monies on participation in the consortium. Being part of this consortium greatly increases the number and types of materials available to students.
You can also run your own SQL in Access through oracle. There are a plethora of reports available in the CARLI Access database and you can of course create your own, either from scratch or by building upon a query already available.
Marcella

Moving on to the next methodologies
In an effort to ease access to reports, CARLI has developed a Beta link to some reports, bringing the information to you almost instantaneously.

The CARLI website has a list of shared SQLs you can use to run your own I-Share reports in Access, and there are a wide array of universal borrowing queries available in the access database as well.*

You can create modified queries using the ones available or even create completely new ones.
If you don’t feel you can create your own, or don’t have the time needed you can send a request to CARLI and they will do it for you.

---

### I-Share statistics can be gathered through 4 primary methodologies:

- **Files uploaded to the library’s CARLI FTP account**
  - Transferring Data Files to and from the CARLI Servers using Secure FTP: [https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/SSHSecureShell](https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/SSHSecureShell)
  - What's in my FTP Directory?: [https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/lnFTP](https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/lnFTP)

- **CARLI Web Reports Beta**
  - Background and Overview: [https://www.carli.illinois.edu/products-services/i-share/reports/web-reports](https://www.carli.illinois.edu/products-services/i-share/reports/web-reports)
  - Login: [https://web-reports.carli.illinois.edu/login](https://web-reports.carli.illinois.edu/login)

- **Voyager Access Reporting**
  - Running & Creating Reports: [https://www.carli.illinois.edu/products-services/i-share/reports](https://www.carli.illinois.edu/products-services/i-share/reports)

- **Contacting CARLI Support**
  - Email: support@carli.illinois.edu
Poll Question:

Do you run Access reports for I-Share data?

Marcella
So let’s take a quick poll - How many of you run Access reports? Or have someone who runs them for you?
Voyager Web Reports Beta

There are reports in Acquisitions, Circulation, Statistics, System Administration, Universal Borrowing, and Cataloging. More reports will be added over time.

[https://www.carli.illinois.edu/products-services/i-share/reports/web-reports](https://www.carli.illinois.edu/products-services/i-share/reports/web-reports)

If you have suggestions for new reports to add to the site, please send an email to feedback@carli.illinois.edu.

UB Borrowing Reports

- Item Status "In Transit" for UB
- List patrons with materials charged from other I-Share libraries
- UB Call Slip Processing Statistics by Date Range

Marcella
We’ll start with the most accessible ones first. CARLI has a link on their website to Voyager Web Reports Beta, which was designed to enable I-Share libraries to run reports using the Voyager databases, but without needing to have Oracle/ODBC and Microsoft Access. However you must have an oracle account to access the reports from the website. You can get in touch with CARLI if you need one.

You can click on a link [https://www.carli.illinois.edu/products-services/i-share/reports/web-reports](https://www.carli.illinois.edu/products-services/i-share/reports/web-reports) to get a list of all the reports offered and, as you can see there are links available for you to make suggestions for new reports to be added if you like.

Currently, there are 3 beta reports for Universal Borrowing available. The one most helpful for our statistical purposes would be the last one: UB Call Slip Processing Statistics by Date Range.
Marcella

After choosing the desired report and filling in the requested date range on the form shown here, it takes but a moment for the file to appear in the box on the right. Then simply clicking on the “Result” link opens up the report.
Marcella

So here is the third listed Universal Borrowing report available in Beta. The “UB Call Slip Processing Statistics by Date Range” in a nice clean uncluttered version.

Seeing the number of requests not filled for various reasons would be helpful in determining staffing issues, whether it be in shelving or retrieving, or perhaps it’s a sign of theft or purposeful destruction if, lets say, your damaged status is very high.

All the information is useful when considering how to improve Library service. Theft or damages for instance, depending on what kind, could well be something to report to administration.

But perhaps more important would be the number of filled requests. This could certainly be useful when speaking to the administration or the board. Sharing your collection with the rest of Illinois sends a positive message when asking for state funding. A library with an excellent collection would be a draw for students as well as being a draw to entice learned faculty.
Voyager Access Reporting and Shared SQL

Libraries can use Microsoft Access to learn more about their Voyager data.

Directions for Getting Started: [https://www.carli.illinois.edu/products-services/i-share/reports/starting-access-reports](https://www.carli.illinois.edu/products-services/i-share/reports/starting-access-reports)

Introduction to Access Video Series: [https://www.carli.illinois.edu/products-services/i-share/reports/secure/intro-access videos](https://www.carli.illinois.edu/products-services/i-share/reports/secure/intro-access videos)

Shared SQL

The CARLI_Reports_2016.mdb file contains all of the Shared SQL written before August 2016.

Descriptions of the Shared SQL reports and any new queries added, can be found on the Running & Creating Reports webpage: [https://www.carli.illinois.edu/products-services/i-share/reports](https://www.carli.illinois.edu/products-services/i-share/reports)

Marcella

As we mentioned, CARLI’s Voyager Web Reports Beta provides a quick and easy method for library staff to easily run a selection of reports. These reports run in Web Reports Beta are selected from a shared query set called “shared SQL.”

Libraries can use Voyager Access Reporting to learn more about their Voyager data. Information for setting up Access Reporting is linked on this screen; and you can let CARLI know of any questions you have.

Once you, or someone at your library, has Access Reporting set up, the shared SQLs are a great way to begin investigating your library’s Voyager data. The shared SQL (aka shared queries or canned queries) come from multiple sources; some written by Ex Libris, others have been written by CARLI staff, while some were created by your colleagues from other I-Share libraries.

When you use the new CARLI_Reports_2016 database file, that file already contains all the shared SQL queries written before August 2016. These Shared SQL cover an entire host of Voyager topics. You’ll see a few of the Resource Sharing ones that may be helpful to you next.

And of course you can always ask CARLI and they will be happy to run the canned queries on your behalf and send the data to you either through email or uploaded to
your FTP.
Marcella
This slide and the next one highlight a few of the Shared SQL that can be helpful for Resource Sharing.
Some queries provide statistics for writing your Interlibrary Loan reports, others help with library workflows.
Each SQL has a quick little description of it’s purpose.

Here you see the No-Fill Reasons for Call Slips, for example. Looking through those reasons may help pinpoint issues to then improve service.
The Old In Transit Status Query can prompt a follow-up on the whereabouts of the item.
These narrow focus SQL all aid in the improvement of workflow ultimately bettering the numbers that are later used in presentations in library matters.
Marcella
We'll look at some of these SQL in more detail on the next slides, but you can refer back to this list after the webinar to see if any of these reports may be helpful for you, such as the Call Slip processing statistics where you can judge the speed of fulfillment of your call slip requests.
or Home Patron Active UB charges so you can see how many of your patrons are using I-Share at any given moment..

The UB Stat 3 Conspectus Main Query is the one that is used to create the titles list for librarians that we talked about earlier.
Here you see it states that it combines the ubstat_3 for import with the conspectus categories, which are from the Conspectus_Ranges_2009 table.
This screenshot gives an example Shared SQL as posted on the CARLI website.

At this moment, the majority of the Shared SQL queries posted on the website are included in the CARLI_Reports_2016 database, but the shared SQL webpages are helpful because they give notes and further descriptions for what the reports may be useful for.

You can read what it does and how it might be useful to you, does it suit your needs. This tells you which fields will appear in the final report. That can also be a deciding factor.

Also helpful is the estimated timing since some queries are very slow due to all the data involved.

Below all the information is the SQL.

You will find a main query and sometimes a subquery, of which there can be more than one. Some subqueries must be run, others not.

Instructions would tell you whether subqueries need to be run and also in what order. If you know how to run the queries and have the necessary privileges you can copy and paste the SQLs into your Access reports database to create the new reports. You can also run them directly on the Access database from a list of even more UB related queries.
Marcella

There are many more UB queries available in the database. At the moment there are around 40 UB specific SQLs in the CARLI reports voyager access database. Here you see but a small sample of those available.

You can right click to get to properties to get a bit more information but it isn't much. Added text does not appear in the description that often, unlike what the shared SQLs on the website offer, where you can read what it does, what it might be useful for, what fields show up in the final report, and so on...
Marcella
One of the reports focusing on UB that CARLI provides is a query to review the counts for the various call slip statuses.

You can easily see the end results in the status descriptions, and this along with the average and maximum processing times may help in adjusting the workflow for filling call slips. Are many things being promoted before you can locate them? Should you say no quicker so the next library can send it off rather than you letting it sit while you search? Is your cancelled number high? Perhaps you can search further to locate an item before saying no.

You can weigh this information keeping in mind what would best serve the student.
Voyager Access Reporting and Custom Queries

Writing custom queries takes practice.

CARLI staff are happy to help design custom queries to meet a library’s needs, and to double-check queries created by library staff if you have questions.

Email support@carli.illinois.edu to ask questions about a query you’ve designed or modified.

Fill out a WRO for Voyager Reporting> Ad Hoc (Customized) Report to request CARLI write a new query: https://wro.carli.illinois.edu/

Marcella
The Annual Statistics, Voyager WebReports Beta, and the Shared SQL likely WON’T provide all of the data your library wishes to know about your Voyager usage.

CARLI staff are happy to help if you’re not sure whether a canned query exists that will meet your needs, or if you have a new query in mind CARLI can assist you.

If you know you’d like to create a custom query, CARLI staff are also available to double-check custom queries written by library staff.

The following slides are some examples of some custom queries I use for resource sharing data.
These new queries separate the filled and unfilled titles. This was at specific request from our librarians who can then see which of their items are being borrowed by other libraries and also how often. I’m not sure of what the librarians do with this information, but this allows them to see how many of their items are going out to other than our patrons.

It may be useful to see if the part of collection they are responsible for is strong in comparison to other consortial libraries - whether a lot of requests are coming for items in a specific area.

You can see that the Publication Manual of the American Psychological Association had multiple requests- (there were 8 all tolled) so should we acquire more copies?.

Just as an aside - Barcodes are also on the list, they’ve just been removed for the sake of this presentation. An identical query is also run for the unfilled callslip requests.
Marcella
Using the specially created COD-CallSlipBetweenDates-NotFilled report a list with the pertinent information regarding unfilled call slips can be run. Barcodes have again been removed.

Really only of secondary use for librarians, although they may want to consider repurchasing some items that have gone missing, especially if their subject area has taken a bigger hit.

Circulation departments can run this to see the reasons for not filling a request, and act accordingly be it from marking something missing to adjusting the UB borrowing profile or to correctly reflect the policy if the item should not have been requestable.

For our librarians we put the Borrowing Filled, Borrowing Unfilled, Lending Filled, and Lending unfilled queries into one excel file every month and make it available to all our librarian faculty and staff.

This then includes all Universal Borrowing usage.

CARLI provides other reports for local borrowing, some of the reports we discussed earlier including local borrowing stats.
Amy
Now that we have provided an overview of the different data available to you from CARLI, and provided examples for how to convert that data into graphs, we want to give you some ideas for ways that you could potentially use this data.
Reporting to External Agencies

I-Share Annual Statistical Package
https://www.carli.illinois.edu/products-services/i-share/stats/

Section 3 - Tips on Using These Reports to Fill Out Surveys from External Agencies

ILLINET Interlibrary Loan and Reciprocal Borrowing Survey
IPEDS Survey
ACRL Survey
ARL Survey

Amy
I-Share data can be used to complete reports required by external agencies. CARLI provides information for how the data can be used to complete the ILLINET Interlibrary Loan and Reciprocal Borrowing Survey, IPEDS Survey, ACRL Survey, and the ARL survey on their website.
Other Ideas for Using I-Share Data:

- Fiscal year assessment of circulation and resource sharing data
- Collection development
- Maintaining accurate catalog records
- Determining borrowing and lending trends over time
- Identifying peak times of usage
- Connecting to other statistics in your library
- Justifying the cost of membership

Amy
When generating reports of the data it is important to determine who needs the information, and what data will be most useful to them.

At my institution I combine data related to circulation and interlibrary into one report to demonstrate the use of materials in our collection by local patrons as well as what is borrowed by patrons from other institutions.

As Marcella mentioned librarians are interested in the data from ub_stat_3 and ub_stat_5 in order to make collection development decisions. The data from ub_stat_5 is especially useful because that show requests placed by your patrons that were not filled, which can help librarians determine new purchases based on patron requests.

The UB Call Slips Processing Statistics by Date Range can help identify items that were not lent because they could not be found. Marking an item as missing in the Call Slip Queue does not update the item status in the catalog, and this can help maintain accuracy of your holdings as well as identify items that need to have replacement copies purchased.

This data can help compare your institution’s borrowing and lending habits - Do you lend more than you borrow? Borrow more than you lend?
Seeing monthly trends can help you determine peak times for usage that can affect staffing decisions and hiring student workers by determining when you need more help during the year.

The monthly ub_stat_4 report, when converted to a line graph, helps you to see the peak time that lending and borrowing requests are placed via I-Share.

In my circulation and interlibrary loan reports I combine data regarding I-Share resource sharing as well as interlibrary loan requests we receive via ILLiad. This helps give a clear picture of all resource sharing activity.

Conducting a data analysis over time can establish changes in patron borrowing habits, and by connecting I-Share usage to other library statistics you could compare resource sharing data to usage trends of e-resources and other local collections. Borrowing and lending trends could also be connected to your institutional enrollment.

You can take the I-Share data and connect the data to a bigger picture to present to your administrators, your board, or even the state.
Questions?

CARLI Support: support@carli.illinois.edu

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

CARLI I-Share Annual Statistics Webpage: https://www.carli.illinois.edu/products-services/i-share/stats/

Amy
If you have any questions please type them in chat and we will do our best to answer them.
Feel free to contact CARLI support
Post questions on the CARLI Resource Sharing Interest Group listserv
We will be having another Resource Sharing Statistics Webinar on Wednesday November 9th from 10-11 about how we use statistics available in WorldShare and ILLiad

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