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
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

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

OCLC Usage Statistics Portal
Borrower Activity Overview Report

Using Borrowing Activity Overview Data

Open Access Report

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

https://www.carli.illinois.edu/products-services/i-share/crs/OpenAccessILL
### Lender Reasons for No Report

<table>
<thead>
<tr>
<th>Loan Number</th>
<th>Reason for No Report</th>
<th>Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Low credit score</td>
<td>01/01/2016</td>
<td>Low income, no contingencies</td>
</tr>
<tr>
<td>2</td>
<td>Bankruptcy</td>
<td>05/05/2016</td>
<td>Proven financial difficulty</td>
</tr>
<tr>
<td>3</td>
<td>Income Verification</td>
<td>10/10/2016</td>
<td>Unable to verify income</td>
</tr>
</tbody>
</table>

### Book Requests for May 2016

<table>
<thead>
<tr>
<th>Book Title</th>
<th>Request Date</th>
<th>Due Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Great Gatsby</td>
<td>06/06/2016</td>
<td>07/07/2016</td>
<td>Loaned to staff member</td>
</tr>
<tr>
<td>Pride and Prejudice</td>
<td>07/07/2016</td>
<td>09/09/2016</td>
<td>Currently checked out</td>
</tr>
<tr>
<td>1984</td>
<td>08/08/2016</td>
<td>10/10/2016</td>
<td>On hold for new customer</td>
</tr>
</tbody>
</table>

### Tabulation of Manual Excel Data - Loans

<table>
<thead>
<tr>
<th>Loan Number</th>
<th>Principal Amount</th>
<th>Interest Rate</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>$50,000</td>
<td>6.5%</td>
<td>01/01/2016</td>
<td>01/01/2018</td>
</tr>
<tr>
<td>5</td>
<td>$75,000</td>
<td>7.2%</td>
<td>02/02/2016</td>
<td>02/02/2019</td>
</tr>
<tr>
<td>6</td>
<td>$100,000</td>
<td>5.5%</td>
<td>03/03/2017</td>
<td>03/03/2020</td>
</tr>
</tbody>
</table>

---

*Note: The above tables are placeholders for actual data.*
Tabulation of Manual Excel Data - Articles

### ARTICLE REQUESTS FOR JUNE 2016

<table>
<thead>
<tr>
<th>Title</th>
<th>Code</th>
<th>Article</th>
<th>Type</th>
<th>Image</th>
<th>Author</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>What does an actual heart attack feel like?</td>
<td>G200</td>
<td>R20001</td>
<td>A</td>
<td>R200</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Heart attacks: are they still a mystery?</td>
<td>K120</td>
<td>K12001</td>
<td>A</td>
<td>K120</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>How to prevent heart attacks</td>
<td>N320</td>
<td>N32001</td>
<td>A</td>
<td>N320</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>The heart: a muscle pump</td>
<td>O420</td>
<td>O42001</td>
<td>A</td>
<td>O420</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Understanding the heart: a muscle pump</td>
<td>P530</td>
<td>P53001</td>
<td>A</td>
<td>P530</td>
<td>A</td>
<td>A</td>
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<tr>
<td>Controlling the heart: a muscle pump</td>
<td>Q640</td>
<td>Q64001</td>
<td>A</td>
<td>Q640</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Detecting heart disease: a muscle pump</td>
<td>R750</td>
<td>R75001</td>
<td>A</td>
<td>R750</td>
<td>A</td>
<td>A</td>
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<td>Treating heart disease: a muscle pump</td>
<td>S860</td>
<td>S86001</td>
<td>A</td>
<td>S860</td>
<td>A</td>
<td>A</td>
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<tr>
<td>Preventing heart disease: a muscle pump</td>
<td>T970</td>
<td>T97001</td>
<td>A</td>
<td>T970</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>The heart: a muscle pump: a muscle pump</td>
<td>U080</td>
<td>U08001</td>
<td>A</td>
<td>U080</td>
<td>A</td>
<td>A</td>
</tr>
</tbody>
</table>
| Comparing Borrowing and Lending Data

### Borrower Transaction Level Detail Report - Institution

<table>
<thead>
<tr>
<th>Institution</th>
<th>Loan Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution1</td>
<td>A</td>
<td>1000</td>
</tr>
<tr>
<td>Institution2</td>
<td>B</td>
<td>2000</td>
</tr>
<tr>
<td>Institution3</td>
<td>C</td>
<td>3000</td>
</tr>
</tbody>
</table>

### Lender Transaction Level Detail Report - Institution

<table>
<thead>
<tr>
<th>Institution</th>
<th>Loan Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution1</td>
<td>A</td>
<td>1000</td>
</tr>
<tr>
<td>Institution2</td>
<td>B</td>
<td>2000</td>
</tr>
<tr>
<td>Institution3</td>
<td>C</td>
<td>3000</td>
</tr>
</tbody>
</table>

### Comparing Borrowing and Lending Data

<table>
<thead>
<tr>
<th>Year</th>
<th>Borrowing</th>
<th>Lending</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>5000</td>
<td>4500</td>
</tr>
<tr>
<td>2017</td>
<td>4000</td>
<td>3500</td>
</tr>
<tr>
<td>2018</td>
<td>3500</td>
<td>3000</td>
</tr>
</tbody>
</table>
Comparing Filled and Not Filled Data

Comparing Requests by Patron Type
ILF Fiscal Year Statistics Template

IFM - ILL Fee Management

Sample: ILL Fee Management Lender Report

Copyright Compliance
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
Accessing ILLiad Web Reports

ILLiad Web Report Areas

Borrowing Reports
- Fill Rate Statistics
- Most Requested Journals
- Most Requested Loans
- Registered Users by Department
- Requests Received by Day
- Requests Sent by Day
- Requests Submitted by Hour
- Requests by Department
- Requests by Department and User Status

Lending Reports
- Fill Rate Statistics
- Most Requested Loans
- Registered Users by Department
- Requests Received by Day
- Requests Sent by Day
- Requests Submitted by Hour
- Requests by Department
- Requests by User Status

Document Delivery Reports
- Fill Rate Statistics
- Most Requested Journals
- Most Requested Loans
- Registered Users by Department
- Requests Received by Day
- Requests Sent by Day
- Requests Submitted by Hour
- Requests by Department

Administrative Reports
- Fill Rate Statistics
- Most Requested Journals
- Most Requested Loans
- Registered Users by Department
- Requests Received by Day
- Requests Sent by Day
- Requests Submitted by Hour
- Requests by Department

Requests Finished
Requests Finished and Cancelled
Turnaround Time
Electronic Delivery Turnaround Time
Delivery Time Distribution
Who We Borrow From
Journals Received
WorldCat Information
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

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

Most Loaned Journals - FY2013-FY2016

<table>
<thead>
<tr>
<th>DLOC Number</th>
<th>Journal Name</th>
<th>Number of Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>71753682</td>
<td>School Nurse News</td>
<td>175</td>
</tr>
<tr>
<td>70285418</td>
<td>The NAPTA Journal</td>
<td>12</td>
</tr>
<tr>
<td>7038348</td>
<td>Educational Psychology</td>
<td>32</td>
</tr>
<tr>
<td>7170457</td>
<td>Educational Studies</td>
<td>59</td>
</tr>
<tr>
<td>6979540</td>
<td>Teaching and Teacher Education</td>
<td>20</td>
</tr>
<tr>
<td>6364553</td>
<td>The Clinical Neuropsychologist</td>
<td>40</td>
</tr>
<tr>
<td>7153315</td>
<td>Personality and Individual Differences</td>
<td>80</td>
</tr>
<tr>
<td>661773</td>
<td>The Journal of Clinical Psychology</td>
<td>44</td>
</tr>
<tr>
<td>7046756</td>
<td>Computers in Human Behavior</td>
<td>31</td>
</tr>
<tr>
<td>7131310</td>
<td>Neurology</td>
<td>37</td>
</tr>
<tr>
<td>6753428</td>
<td>Journal of Education Policy</td>
<td>34</td>
</tr>
</tbody>
</table>
Fill Rate Statistics

Using Fill Rate Statistics
Requests Submitted and Filled

Using Fill Rate Statistics
Fiscal Year Comparison for Borrowing Requests
Requests Received by Day - Lending

Using Requests Received by Day
Lending Monthly Requests

Fiscal Year Comparison of Monthly Lending Requests
Comparing Data with Other Resource Sharing Data

Administrative Reports
Copyright
Borrowing Invoices Received
Lending Library
Customers Cleared
Outstanding Requests
Requests by Username
Staff Activity by Username

Outstanding Requests
Requests by Username

<table>
<thead>
<tr>
<th>Username</th>
<th>Last Name</th>
<th>First Name</th>
<th>Department</th>
<th>Status</th>
<th>Total Requests</th>
<th>Complete Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Using Requests by Username Report

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
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