User Guide
Statistics
Version 5.0.25
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INTRODUCTION

This User Guide is designed to provide a working understanding of the features and functions of Statistics for RESEARCHit/SHAREit.

Overview

Statistics is an online application that lets you create and view statistics reports related to the content and usage of your RESEARCHit/SHAREit system. Using Statistics, you can:

- View Interlibrary Loan (ILL) activity statistics for your library
- View database and usage statistics for your library

The Web Interface

The Statistics web interface is designed to provide a logical and efficient means of requesting, creating and viewing statistical reports. The screens are structured to assist workflow, and contain navigational links and menus to provide “single-click” access to module features and functions.

The Staff Dashboard

The Staff Dashboard displays all staff menus available for your user account. The Staff Dashboard includes a search option to aid in locating a specific staff feature or function. The Staff Dashboard can be displayed in either “collapsed” or “expanded” format.

To access the Staff Dashboard:

- Click the Staff Dashboard link on any screen in the Search interface.
  - The Staff Dashboard displays.
  - The Staff Dashboard includes a separate staff menu for each staff module available through your user account.
- The Staff Dashboard is displayed in “collapsed” format by default. Click the Toggle Menu button to toggle the display to the “expanded” format. Click again to return the display to the “collapsed” format.
  - When the Staff Dashboard is displayed in the “collapsed” format, click the icon for an individual menu to expand the menu. Click the icon to collapse the menu.
To search the Staff Dashboard:

- Enter your search term (the name of the feature or function you wish to locate) in the **Search Staff Dashboard** text box.
  - The Staff Dashboard refreshes as you type to display only those headings, features and functions that contain your search term.
- Click the X in the **Search Staff Dashboard** text box to clear your search term and display all staff menus available for your user account.

### The Statistics Menu

The **Statistics** menu provides access to features and functions related to requesting, creating and viewing the statistical reports.

#### To access the Statistics menu:

1. Click the **Staff Dashboard** link on any screen in the Search interface.
   - The Staff Dashboard screen displays. The Dashboard displays all staff menus available for your user account.

2. The **Statistics** menu provides access to the following options:
   - **ILL Statistics** - Provides the options to view Interlibrary Loan (ILL) activity statistics for your library’s SHAREit system.
     - **Activity and Request Reports** - Lets you generate ILL activity reports (borrowing activity, lending activity, net activity), and download request records and/or lender response records.
     - **Summary Report** - Lets you generate a summary report of completed ILL requests processed by all libraries within your consortium or collective for a specified weekly or monthly period.
       - The **Summary Report** function is available to **Customer SuperUsers only**.
     - **CONTU Copyright Tracking Reports** - Lets you generate statistical reports related to copyright compliance tracking in accordance with the Commission on New Technological Uses of Copyrighted Works (CONTU) guidelines for photocopy requests.
   - **Download Participant Records** – Lets you export selected data fields from the Participant Records of one or more selected libraries within your consortium or collective.
Borrower Statistics – Provides statistics for the number of all active and completed ILL requests created and processed by your library, as a borrower from other participant libraries, for a given time period.

Borrower Record Counts – Provides statistics for the number of all ILL requests made by your library to borrow materials or receive photocopies from other lenders.

Borrower Days to Receive Reports – Provides historic data on the time taken for ILL requests submitted by your library as a borrower during a given report period to be filled and shipped by a lender.

Lender Statistics – Provides statistics for the number of all active and completed ILL requests received and processed by your library, as a lender to other participant libraries, for a given time period.

Lender Record Counts – Provides statistics for the number of all ILL requests received by your library to lend materials or supply photocopies to other libraries.

Lender Days to Supply Report – Provides historic data on the time taken to fill ILL requests received by your library as a lender during a given report period.

Stayed Too Long Report – Generates a list of active ILL requests that have remained “idle” in a selected status for greater than a specified number of days.

Staff Login Activity Report – Generates a list that shows the most recent login date for qualifying staff users (based on a specified cutoff date) at one or more selected libraries within a consortium or collective.

The Staff Login Activity Report function is available to Customer SuperUsers only.

Database Statistics - Provides the options to view database and usage statistics for your library’s RESEARCHit/SHAREit system.

Database Index Stats - provide summary information related to your library's A-G database(s). Displayed statistics include general index statistics, qualifier statistics and locations statistics.

Database Field Stats - provides general information related to the number of bibliographic and locations (holdings) record in your library’s A-G database, and provides detailed MARC Field statistics for the entire database for your library.

System Activities - provides summary information related to your library's system for a specified report period. Displayed statistics include login data, search data, ILL request data and cataloging data.

Statistics Report - lets you create specialized usage Statistics reports for your library’s system.

Graphical Statistics Report - lets you view summary information related to your library's system for a specified report period in a graphical format. Available statistics include login data, search data, ILL request data and cataloging data.

Graphical WebStats - provides detailed Web statistics related to the access and use of your library's system.

The Graphical Webstats function is available to Customer SuperUsers only.

User Guides - Displays the User Guides page of the Documentation tab.

3. Click the button to return to the Search interface.
Using Quick Access Menus

Staff screens displayed from a menu in the Staff Dashboard (see The Staff Dashboard on page 1 for details) show the name of the currently active function (or submenu and function where applicable) in the screen header. Each menu and/or function name includes a “quick access” menu, allowing you to select another function for the currently active module without the need to return to the Staff Dashboard.

To use the “quick access” menus:

- Click the icon next to the function or submenu name in the screen header.
  - The “quick access” menu displays, listing all functions and submenus available for the currently active module.
  - Submenu names are indicated by a icon on the right side of the menu.
- Click the desired function.
  - To select a function from a submenu, position the cursor on the submenu name to display the functions available through the submenu.

The Staff Screen Toolbar

Staff screens displayed from a menu in the Staff Dashboard (see The Staff Dashboard on page 1 for details) include a toolbar in the upper right corner of the screen. The following functions are provided:

- Click the Home button to return to the initial (starting) screen for the currently selected function.
- Click the Refresh button to refresh the content of the current screen.
- Click the Print button to print the current screen.
- Click the Close button to close the screen and return to the Staff Dashboard.

Organization of the User Guide

This User Guide is designed to provide an overview of the features and functions of Statistics, and includes the detailed procedures for requesting, creating and viewing statistical reports. The User Guide is divided into five chapters, as follows:

Chapter 1 – Getting Started. This chapter explains how to prepare to use Statistics. The chapter includes hardware/software requirements, system availability, and system Login and Logoff.

Chapter 2 – ILL Activity Reports and Download. This chapter provides the procedures to request and view statistical reports related to your library’s ILL activities.
Chapter 3 – Viewing Database Statistics. This chapter provides the procedures to request, create and view statistical reports related to the content and usage of your library’s A-G database(s).

Chapter 4 – Customer SuperUser. This chapter provides procedures specific to Customer SuperUsers.

Optional Features

RESEARCHit, SHAREit and VERSO are modular in design, and offer libraries a high degree of flexibility in configuring the systems to suit the specific needs of their patrons and staff members. The “basic” RESEARCHit module can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging and Authority Control, Union Database Management, Statistics, UX Administration and/or ILL Administration (SHAREit). The “basic” VERSO Search and Circulation modules can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging and Authority Control, Serials and Acquisitions management, Union Database Management, Statistics, UX Administration and/or ILL Administration (SHAREit). Additionally, a number of optional features and functions are available within each module.

This manual provides instructions covering all features and functions available through UX Administration. Depending on the specific configuration of for your library, some features and functions may not be available to you. For information on enabling optional features and functions for your library, contact Auto-Graphics Sales and Marketing.
Chapter 1. GETTING STARTED

This chapter identifies the hardware and software necessary to access and operate Statistics, where to get help, and procedures for system Login and Logoff.

Hardware/Software Requirements

RESEARCHit and SHAREit can be accessed by a Web-capable PC or Macintosh using a standard Internet account and a Java-enabled Web browser. No stringent hardware requirements are necessary. Statistics is available through appropriate Staff Login (see Logging In on page 7 for details).

Configuring Your Browser

When a browser is installed on your workstation, it is configured with a default set of preferences. Some of these preferences must be modified to configure the browser for use with the RESEARCHit and/or SHAREit systems. You must verify the browser is properly configured to ensure full access to all features and functions available through the system. Refer to Product Information Bulletin AG-002, Browser Tips for RESEARCHit / SHAREit / VERSO for recommendations to configure your browser for best performance.

System Availability

Statistics is available via RESEARCHit or SHAREit, 24 hours daily.

Getting Help

If you need help using Statistics, contact Auto-Graphics’ Help Desk by one of the following means:

voice:  (800) 852-8686  5am ~ 5pm Pacific Time
email:   HelpDesk@auto-graphics.com
fax:     (909) 595-3506

Before calling the Help Desk, consider referencing one of the following sources of information:

- Online Help. HTML-based Help displays in a separate browser window that you can view concurrently with your online session.
- The Documentation tab available through the Staff Menu is intended to be a source for helpful information and documentation. From this link you can view the latest Release Bulletins, Product Information Bulletins, User Guides and News Items.

Logging In

You must provide a valid Username and Password to log into RESEARCHit or SHAREit with staff or authenticated patron privileges.

Some workstations within your library may be configured to provide “generic” patron access based on the IP address of the workstation. If your library utilizes “IP authentication” for “generic” patron login, and your workstation falls within the specified IP range, the “IP Authenticated” screen displays when you first access the system. Click the My AGent button to display the Login screen (click the Begin button to access the system as a “generic” patron).
If your library has enabled the optional "Suppress 'My AGent' Login" feature, the My AGent button is not shown on the "IP Authenticated" login screen. You cannot perform an authenticated login from this workstation.

Some systems may be configured to provide authentication via a “cookie” saved to your workstation. If you wish to save a “cookie” containing your login information to your workstation for future logins, select the Remember me checkbox on the login screen, then submit your login request.

- A checkmark ☑ indicates a “cookie” will be saved to your workstation.
- An empty checkbox ☐ indicates a “cookie” will not be saved to your workstation.
- Clicking the checkbox will toggle it on and off.

If your workstation is used by more than one person, to prevent unauthorized access to staff features and functions, it is recommended that you do not save your login information to a “cookie”.

Once your login information has been saved to a “cookie” on your workstation, the Authenticated User Login screen will display each time you access RESEARCHit or SHAREit. Click the Begin button to login using the saved login data.

If you choose to login as a different user, the “cookie” containing your current login data will be overwritten with the new login data.

To login:

1. Click the Login link to display the login screen.
2. Select the library you wish to log in to from the Select your library menu.

   The Select your library menu feature is optional, and may not be enabled for all systems.

   - Click the  button to open the Select your library menu.
     - The Select your library menu shows the library code and library name for all libraries in your consortium or collective.
   - Enter the library code or library name of the library to which you wish to log in.
When entering a library code, enter the complete library code.

When entering a library name, you may enter a partial library name.

- As you type, the Select your library menu refreshes to display only those libraries that contain the text you have entered.
- Click the name of the desired library.

3. Enter your user name in the Username text box.
   - If your library has enabled “nickname” functionality and a Nickname is included in your User Record, you can optionally enter your “nickname” in the Username text box.

4. Enter your password in the Password text box.
   - Your password will display on the screen as a series of bullets.
   
   In some cases, libraries may assign the default password “USERPASS” or “STAFFPASS” when creating an account for a new user (library patron or staff member). When you log into RESEARCHit or SHAREit for the first time using the default password “USERPASS” or “STAFFPASS”, you are prompted to provide a permanent password to complete the login process (see Entering Your Permanent Password on page 10 for details).

5. Click the Submit button to submit your Login request.
   - If your library provides access to third-party databases that require cookies for authentication, and your browser’s Privacy/Security settings are not sufficient to accept cookies from third-party databases, an advisory “Cookie Settings” message displays.
     - If you wish to ensure access to third-party databases that require cookies for authentication, adjust your browser’s Privacy/Security settings, as needed, then click the Continue link to complete your login.
     - If you do not wish to change your browser’s Privacy/Security settings, click the Continue link to complete your login.
       - If you choose not to adjust your browser’s Privacy/Security settings, searches of any databases utilizing “cookie authentication” will fail.

   - If your Login request is unsuccessful:
     - If you enter an invalid Username or an invalid Password, the system returns to the Login screen and displays the message “Invalid Username” or “Invalid Password,” as appropriate.
     - Check your library selection, Username and Password. Make any necessary corrections, then click the Submit button to resubmit the form.

   **Invalid Username or Password Screen**
Click the **Forgot your password** link to request an email copy of your password. The screen refreshes to display the “Forgot Your Password” form fields. Enter your username in the second **Username** text box, then click the **Send** button. When you receive your password, make any necessary corrections to your library selection, **Username** and **Password**, then click the **Submit** button to resubmit the form.

If an email address is not included in your user profile, you cannot use the **Forgot your password** feature.

- If your Login request is successful:
  - The system displays the default opening page for your user account.

    The default opening page for your account can be set through the **My Preferences** function in the **My Account** menu (see the **Search User Guide** for details).

  - Appropriate links and buttons are added to Title Lists and Full Record Displays throughout the system.

### Entering Your Permanent Password

When you log in for the **first time** using the default password “USERPASS” or “STAFFPASS”, the Permanent Password screen displays.

**You must** provide a permanent password to complete the login process. Select a password that you will remember. Your password may be a **maximum** of 20 characters in length, with **no spaces**. Your password may have **any combination** of alphabetic and numeric characters, and the underscore “_” character. Your password is not case-sensitive.

**To enter your permanent password:**

1. Enter the password you have chosen in the **New password** and **Confirm password** text boxes.

   Enter the password in **exactly the same way in both** text boxes.

2. Click the **Go** button to save your permanent password and complete the login process.

- If you enter an invalid password, an error dialog displays the message “Passwords do not match.”
Make sure there are no spaces in your password.

- Make sure you enter your password in exactly the same way in both the New password and Confirm password text boxes.
- Re-enter your password in the New password and Confirm password text boxes, then click the Done button.

REMEMBER TO KEEP YOUR PASSWORD SECURE. DO NOT tell your personal password to anyone. DO NOT write your password down. You will use your new password for all future logins, so remember it! If you think your password may be compromised, you can change it at any time using the My Account feature (see the Search User Guide for details). If you forget your password, notify your Library or System Administrator.

Viewing a “Message of the Day”

The “Message of the Day” feature allows Auto-Graphics to provide messages to library staff and/or library patrons related to software updates, system downtime or other general information. There are two types of messages; “Require Acknowledgement” and “Information Only.”

To view a “Require Acknowledgement” message:

“Require Acknowledgement” messages are displayed automatically when you log into the system. Click the OK button at the bottom of the message to acknowledge your receipt and complete your login.

To view an “Information Only” message:

“Information Only” messages are accessed through the Your Alerts list. The list can contain message you have read, and messages you have not read. The icon indicates the number of unread messages in the menu.

1. Click the icon to open the Your Alerts list.
   - Messages you have not read are indicated by a shaded background. Messages you have read are indicated by a white background.
2. Click the message you wish to view.
   - The selected message displays.
3. Click the OK button to close the message.
Messages remain in the Your Alerts list until they are expired by the system. If there are no active messages in the Your Alerts list, the message “There are NO new Alerts at this time” is shown.

Setting the Display Language

The display language selection tool is shown to the left of the Simple Search text box. The display language selection tool lets you choose the desired display language.

To select the display language:

- Click the icon to display the language selection menu.
- Click the desired display language.
  - The language selection menu closes, and screen content is shown in the selected language.

Sorting and Filtering Tables

Certain screens within Statistics that present information in a tabular format provide “enhanced” tools for configuring, sorting and filtering content.

To configure a table:

By default, a table shows all available columns. If desired, you can configure the table to display a subset of available columns.

1. Click the icon to display a list of available columns for the table.
2. Use the checkboxes to select the columns you wish to be shown in the display.
   - A checkmark indicates the associated content (column) will be displayed.
   - An empty checkbox indicates the associated content (column) will not be displayed.
   - Clicking a checkbox repeatedly will toggle it on and off.
3. When content has been configured as desired, click the icon to close the list of available columns.

To sort a table:

When a table is initially accessed, content is sorted in alphanumerical order according to the default sort key for the table. If desired, you can re-sort the table using any column as the sort key.

- Click a column head to sort the table alphanumerically according to the selected sort key.
Click the column head a second time to sort the table in reverse alphanumeric order according to the selected sort key.

To filter a table:

By default, a table shows all available entries. If desired, you can filter the table to display a subset of available entries based on one or more terms you enter. You can use one or more words in your term. The system reads the word(s) in your filter term as a string of characters (rather than as separate words).

1. Enter the term by which you wish to filter table contents in the text box at the top of the desired column.
   - As you type, the table is filtered to display only those entries that contain the term you entered.
2. If desired, enter filters for additional columns.
3. Clear the contents of the filter text boxes to display all available entries for the table.

Using the Date Entry Calendar

Some reports require you to specify a starting and ending date for the report period. If you wish, you may use the Date Entry Calendar (when available) to select the report period starting and ending dates.

To select a date from the Date Entry Calendar:

1. Click the icon next to the date entry text box.
   - The Date Entry Calendar displays. The calendar shows the current day, month and calendar year.
2. Use the Month and Year drop-down menus to select the desired calendar month and year, or click the < and > buttons to scroll backwards and forwards one month at a time.
3. Click the desired date.
   - The Date Entry Calendar closes, and the selected date is automatically entered in the associated text box.

Logging Off

To prevent unauthorized access to staff features and functions, you must exit Statistics and log off.

To exit Statistics:

- Click the Logout link above your user name in the upper right corner of any screen.
  - The system returns to the “Home” page for your library.
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Chapter 2. ILL STATISTICS

Activity and Request Reports

Activity and Request Reports provide detailed statistics related to the ILL activities for your library. You can specify the start and end dates for the report period. You may choose to generate reports for your library’s borrowing activities, lending activities and/or net ILL activity (borrowing activity versus lending activity). Statistics are provided for both borrow and copy requests. You can also generate records of requests submitted as a borrower and/or responses provided to requests received as a lender for your library.

Depending on the specific report, you can view the report on-screen, view and download the report in PDF format, or download the report in Microsoft Excel format.

Customer SuperUsers may download records or generate reports for a single selected library, for a group of libraries, or for all libraries in the consortium. See Chapter 4, CUSTOMER SUPERUSER for details.

To generate Activity and Request Reports:

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select ILL Statistics – Activity and Request Reports.
   - The Activity and Request Reports screen displays.

2. Enter the starting date for the report period in the Start Date text box; enter the ending date for the report period in the End Date text box.
   - Enter the Start Date and End Date using the format “MM/DD/YYYY”, i.e., “03/10/2006.”

   Be sure to include the slashes “/” when entering the Start Date and End Date. Do not include alphabetic characters when entering the Start Date and End Date.

   o You may also click the icon next to the Start Date or End Date text box to select a date using the Date Entry Calendar (see Using the Date Entry Calendar on page 13 for details).

3. Select the desired format for the report(s) from the Select Format menu:
   - HTML – Reports are displayed on-screen in HTML format (see Viewing Reports “On Screen” on page 16 for details).
   - PDF – Reports are displayed on-screen in HTML format and in an additional browser window using the PDF Viewer (see Using the PDF Viewer on page 20 for details). PDF-formatted reports can be downloaded to a local workstation.
4. Indicate the reports you wish to generate by selecting the appropriate Select Report Type checkboxes, as follows:

- You may select to generate one or more reports simultaneously.
  - A checkmark ✓ indicates the associated report is selected.
  - An empty checkbox □ indicates the associated report is not selected.
  - Clicking a checkbox repeatedly will toggle it on and off.

- **Borrowing Activity** - Provides activity statistics for the selected sites as borrowers.

- **Lending Activity** - Provides activity statistics for the selected sites as lenders.

- **Net Activity** - Provides a summary comparison of borrowing versus lending activity for the selected sites.

- **Request Records (Excel only)** - Provides a list of records for all requests submitted by the selected sites as borrowers.

  The Request Records (Excel only) checkbox is active only when EXCEL is selected from the Select Format menu. Request Records (Excel only) cannot be generated in HTML or PDF format.

- **Lender Response Records (Excel only)** - Provides a list of records for all responses to requests received by the selected sites as lenders.

  The Lender Response Records (Excel only) checkbox is active only when EXCEL is selected from the Select Format menu. Lender Response Records (Excel only) cannot be generated in HTML or PDF format.

The Display each site even if statistics are zero radio buttons are intended for use by Customer SuperUsers only, when submitting report requests for multiple libraries. Selecting either Yes or No will have no effect on report content when logged in as a PAC Staff member or Library SuperUser.

5. When all appropriate report criteria has been entered, click the Submit button to submit your report request.

**Viewing Reports “On Screen”**

When you choose HTML from the Select Format menu during report setup, report content is displayed “on screen” in HTML format.

**Borrowing Activity**

The Borrowing Activity report provides detailed statistics on the associated library's ILL activities as a borrower. Separate sections are provided for each library specified in the report criteria. Within each section, individual statistics are provided for each trading partner to whom the associated library submitted borrow requests.

**To view Borrowing Activity:**

- The first line of the report shows the report type and report start and end dates.
The first table in the report contains a summary (Grand Totals) of borrowing activity statistics between all libraries included in the report and all trading partners combined.

The report is subdivided into multiple sections, with one section provided for each library specified in the report criteria. Each section of the report is preceded by the name of the library to which the associated borrowing activity statistics apply.

Each section of the report is comprised of one or more tables. Each table contains individual statistics for a trading partner to whom the associated library submitted borrow requests.

For multiple library reports, the final table in the section contains a summary (Totals) of borrowing activity statistics between the associated library and all trading partners combined.

Since a borrow request that is not filled by a given library is automatically forwarded to the next lender in the Lender List, a single unique borrow request may be submitted to multiple libraries.

Each table provides the following information:

- The table header shows the library name and library code for the associated trading partner.
- Separate lines are provided for borrow requests submitted to the trading partner (Loans), photocopy requests submitted to the trading partner (Copies), reference requests submitted to the trading partner (Reference) and the total number of requests submitted. The following statistics are provided for each line in the table:
  - **Request Attempts / Requested** – Total number of requests submitted to the trading partner by the borrower (this number is equal to the sum of the values shown in the Supplied / Filled, Not supplied / Not filled, Expired, Cancelled and In process fields).
  - **Filled** – Total number of requests for which items were supplied by the trading partner to the borrower.
  - **Not filled** - Total number of requests for which items were not supplied by the trading partner to the borrower (this number is equal to the sum of the values shown in the No Response, ISO Unfilled and Retry fields).
  - **NCIP Hold Placed** – Total number of holds placed on items through a local (external) system.
  - **Passed to Local System** – Total number of requests for items transferred to a local (external) system.
  - **No response** - Total number of requests for which the trading partner did not provide a response to the borrower.
  - **Unfilled** - Total number of requests for which items were not supplied by the trading partner.
  - **Referred** - Total number of requests processed by default lenders to which the Refer to Next Lender option was applied.
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**Retry** - Total number of requests for which items were not supplied by the trading partner but borrower was recommended to retry the request at a later date.

**Lost** - Total number of requests for which items were flagged as “lost.”

**Expired** - Total number of requests where the “Need By” date was exceeded before the lender responded.

**Cancelled** - Total number of requests cancelled by the borrower before the trading partner responded.

**In process** - Total number of requests currently in process between the trading partner and the borrower.

**Unique Requests Sent** – Total number of *unique* requests submitted by the library to all trading partners.

The **Unique Requests Sent** field is shown in the **Totals** and/or **Grand Totals** tables only.

**Staff Initiated** – Total number of requests created by library staff.

The **Staff Initiated** field is shown in the **Totals** and/or **Grand Totals** tables only.

**Patron Initiated** – Total number of requests created by library patrons.

The **Patron Initiated** field is shown in the **Totals** and/or **Grand Totals** tables only.

**Multi Created** – Total number of times the multi-copy request form was used to create one or more ILL requests.

The **Multi Created** field is shown in the **Totals** and/or **Grand Totals** tables only.

**Multi Requests** – Total number of individual ILL requests created using multi-copy request forms.

The **Multi Requests** field is shown in the **Totals** and/or **Grand Totals** tables only.

- Click the **Return To Activity & Request Reports** link at the top of the Borrowing Activity report to return to the Reports and Download screen.

### Lending Activity

The Lending Activity report provides *detailed* statistics on the associated library's ILL activities as a lender. Separate sections are provided for each library specified in the report criteria. Within each section, *individual* statistics are provided for each trading partner from whom the associated library received borrow requests.

- The first line of the report shows the report type and report start and end dates.

- The first table in the report contains a summary (**Grand Totals**) of lending activity statistics between all libraries included in the report and all trading partners combined.

**Lending Activity Report**
The report is subdivided into *multiple* sections, with one section provided for *each* library specified in the report criteria. Each section of the report is preceded by the name of the library to which the following lending activity statistics apply.

Each section of the report is comprised of *one or more* tables. Each table contains *individual* statistics for a *trading partner* from whom the associated library received borrow requests.

For *multiple library reports*, the final table in the section contains a summary (*Totals*) of lending activity statistics between the associated library and *all* trading partners combined.

Each table provides the following information:

- The table header shows the library name and library code for the associated trading partner.
- Separate lines are provided for borrow requests received from the trading partner (*Loans*), photocopy requests received from the trading partner (*Copies*), reference requests received from the trading partner (*Reference*) and the *Total* number of requests received. The following statistics are provided for *each* line in the table:
  
  **Requests Received**- Total number of requests received from the trading partner by the lender (this number is equal to the sum of the values shown in the *Filled / Supplied, Not filled / Not supplied, Expired, Cancelled* and *In process* fields).
  
  **Filled** - Total number of requests for which items were supplied to the trading partner by the lender.
  
  **Not filled** - Total number of requests for which items were not supplied to the trading partner by the lender (this number is equal to the sum of the values shown in the *No Response, ISO Unfilled* and *Retry* fields).
  
  **No response** - Total number of requests for which the lender did not provide a response to the trading partner.
  
  **Unfilled** - Total number of requests for which items were not supplied by the trading partner.
  
  **Referred** - Total number of requests referred to the lender by a default lender.
  
  **Retry** - Total number of requests for which items were not supplied by the lender but trading partner was recommended to retry the request at a later date.
  
  **Lost** - Total number of requests for which items were flagged as “lost.”
  
  **Expired** - Total number of requests where the “Need By” date was exceeded before the lender responded.
  
  **Cancelled** - Total number of requests cancelled by the trading partner before the lender responded.
  
  **In process** - Total number of requests currently in process between the trading partner and the lender.

- Click the **Return To Activity & Request Reports** link at the top of the Lending Activity report to return to the Reports and Download screen.

### Net Activity

The Net Activity Report provides a *summary* of the associated library's ILL activities both as a *borrower* and as a *lender*, and provides a comparison of borrowing versus lending activities. This report is valuable in identifying inequities between trading partners. Separate sections are provided for *each* library specified in the report criteria. Within each section, *individual* statistics are provided for *each trading partner* from whom the associated library received borrow requests and to whom the associated library submitted borrow requests.
• The first line of the report shows the report type and report start and end dates.

• The first table in the section contains a summary (Grand Totals) of net activity statistics between the associated library and all trading partners combined. Each table provides the following information:

• The report is subdivided into multiple sections, with one section provided for each library specified in the report criteria. Each section of the report is preceded by the name of the library to which the following net activity statistics apply.

• Each section of the report is comprised of one or more tables. Each table contains individual statistics for a trading partner from whom the associated library received borrow requests and/or to whom the associated library submitted borrow requests.

• Each table provides the following information:
  ○ The table header shows the library name and library code for the associated trading partner.
  ○ The Lending field shows the total number of Loans and the total number of Copies provided by the associated library as a lender to the trading partner.
  ○ The Borrowing field shows the total number of Loans and the total number of Copies received by the associated library as a borrower from the trading partner.
  ○ The Net Activity field shows the net ILL activity (calculated as Lending minus Borrowing) between the associated library and the trading partner. A Net Activity value of “0” indicates an equal number of borrowing and lending transactions have occurred between the associated library and the trading partner. A negative value indicates a deficit of lending transactions to the trading partner by the associated library; a positive value indicates a surplus of lending transactions to the trading partner by the associated library.

• Click the Return To Activity & Request Reports link at the top of the Lending Activity report to return to the Reports and Download screen.

**Using the PDF Viewer**

When you choose PDF from the Select Format menu during report setup, report content is displayed “on screen” in HTML format and in the PDF Viewer in an additional browser window. The PDF Viewer toolbar lets you view, navigate and download the report.

**To use the PDF Viewer:**

• Use the Toggle Sidebar button to open and close the sidebar. The sidebar lets you view “thumbnails” for each page of the PDF file.

• Use the Previous Page and Next Page buttons to scroll forward and backward through the PDF file, or enter the desired page number in the Page text box and press the <Enter> key to scroll to a specific page.
• Use the [Zoom Out] and [Zoom In] buttons to decrease and increase the magnification of the PDF file, or, select a preset value from the drop-down menu.

• Click the [Presentation Mode] button to place the PDF View in “full screen” mode. Press the <Esc> button to return to PDF Viewer to “normal display” mode.

• Click the [Print] button to print the PDF file.

• Click the [Download] button to download the PDF file to your local workstation (see Downloading Reports and Records on page 21 for details).

• Click the [Tools] button to display the Tools Menu:
  ○ Select [Go to First Page] to scroll to the first page of the PDF file.
  ○ Select [Go to Last Page] to scroll to the last page of the PDF file.
  ○ Select [Rotate Clockwise] to rotate the PDF file 90 degrees clockwise.
  ○ Select [Rotate Counterclockwise] to rotate the PDF file 90 degrees counterclockwise.
  ○ Select [Text Selection Tool] to enable the text selection Tool. The text selection tool lets you select and copy text in the PDF file.
  ○ Select [Hand Tool] to enable the hand tool. The hand tool lets you click and drag to scroll the PDF file.
  ○ Select [Document Properties] to view document properties for the PDF file.

• Click the link at the top of the screen to return to the Full Display.

**Downloading Reports and Records**

**To download reports / records:**

1. When you choose [Excel] from the Select Format menu during report setup, or when you click the [Download] button in the PDF Viewer (see Using the PDF Viewer on page 20 for details), a File Download dialog displays.

2. Select the “save” option on the File Download dialog.
   • A standard Save As dialog displays, with a unique filename assigned to the file.

3. If desired, edit the name for the file in the File name text box.
   
   **Be sure to retain the .pdf or .xlsx extension, as applicable, at the end of the file name.**

4. Select the location in which you wish to save the file.

5. Click the Save button to download the file.
Request Records

The Request Records file contains a separate entry for each request submitted by the selected library(ies) as a borrower for the selected report period. Each entry is comprised of the following data fields:

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower’s Consortium</td>
<td>The consortium with which the borrowing institution is associated.</td>
</tr>
<tr>
<td>Borrower Code</td>
<td>The library code assigned to the borrower.</td>
</tr>
<tr>
<td>Borrower Name</td>
<td>The full name of the borrowing institution.</td>
</tr>
<tr>
<td>Supplier’s Consortium</td>
<td>The consortium with which the supplying institution is associated. If the request was unfilled, this field contains the word “none”.</td>
</tr>
<tr>
<td>Supplier Code</td>
<td>The library code assigned to the lending institution to whom the request was submitted. If the request was unfilled, this field contains the word “none”.</td>
</tr>
<tr>
<td>Supplier Name</td>
<td>The full name of the lending institution.</td>
</tr>
<tr>
<td>Request ID</td>
<td>The unique system-assigned request number.</td>
</tr>
<tr>
<td>Title</td>
<td>The title of the requested item.</td>
</tr>
<tr>
<td>Author</td>
<td>The author of the requested item.</td>
</tr>
<tr>
<td>Pub. Date</td>
<td>The publication date of the requested item.</td>
</tr>
<tr>
<td>Material Bib Level</td>
<td>The material bib level (book, computer file, music, etc.) of the requested item.</td>
</tr>
<tr>
<td>Origination Date</td>
<td>The date on which the request was originally prepared and submitted.</td>
</tr>
<tr>
<td>Created By</td>
<td>The “type” of user that created the request; either Staff or Patron.</td>
</tr>
<tr>
<td>Created By Username</td>
<td>The username of the user that created the request.</td>
</tr>
<tr>
<td>Pickup Location</td>
<td>The Pickup Location specified in the ILL request.</td>
</tr>
<tr>
<td>Patron’s Name</td>
<td>The name of the library patron who created the request (for patron created requests) or the name of the library patron for whom the request was created (for staff created requests). (If your library has enabled the “Suppress Patron Information in Request Record Downloads” option, this field is not included in the Request Records file.)</td>
</tr>
<tr>
<td>ID</td>
<td>The patron ID of the library patron who created the request (for patron created requests) or the patron ID of the library patron for whom the request was created (for staff created requests). (If your library has enabled the “Suppress Patron Information in Request Record Downloads” option, this field is not included in the Request Records file.)</td>
</tr>
<tr>
<td>Request Type</td>
<td>The type of request, either Loan or Copy.</td>
</tr>
<tr>
<td>Article Title</td>
<td>The title of the requested article (used only on serial or copy requests).</td>
</tr>
<tr>
<td>Article Author</td>
<td>The author of the requested article (used only on serial and copy requests).</td>
</tr>
<tr>
<td>Serial Issue</td>
<td>The issue number of the requested serial (used only on serial and copy requests).</td>
</tr>
<tr>
<td>Volume</td>
<td>The volume number of the requested serial (used only on serial and copy requests).</td>
</tr>
<tr>
<td>Serial Issue Date</td>
<td>The publication date of the requested serial issue (used only on serial and copy requests).</td>
</tr>
<tr>
<td>Pages</td>
<td>The desired pages of the requested title or serial (used only on serial and copy requests).</td>
</tr>
<tr>
<td>Copyright Compliance Code</td>
<td>The copyright compliance code (either ccl or ccg) assigned to the associated request.</td>
</tr>
<tr>
<td>Final Disposition</td>
<td>The status of the associated request at the time the Request Records were downloaded.</td>
</tr>
<tr>
<td>History Date</td>
<td>The date and time of the last change in status for the associated request.</td>
</tr>
<tr>
<td>Lenders Tried Count</td>
<td>The number of lenders to whom the associated request had been submitted at the time the Request Records were downloaded.</td>
</tr>
</tbody>
</table>

Lender Response Records

The Lender Response Records file contains a separate entry for each request received by the selected library(ies) as a lender for the selected report period. Each entry is comprised of the following data fields:
## Lender Response Records Data Fields

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower's Consortium</td>
<td>The consortium with which the borrowing institution is associated.</td>
</tr>
<tr>
<td>Borrower Code</td>
<td>The library code assigned to the borrower.</td>
</tr>
<tr>
<td>Borrower Name</td>
<td>The full name of the borrowing institution.</td>
</tr>
<tr>
<td>Supplier's Consortium</td>
<td>The consortium with which the supplying institution is associated. If the request was unfilled, this field contains the word “none”.</td>
</tr>
<tr>
<td>Supplier Code</td>
<td>The three- or four-character code assigned to the lending institution that received the request.</td>
</tr>
<tr>
<td>Supplier Name</td>
<td>The full name of the lending institution.</td>
</tr>
<tr>
<td>Request ID</td>
<td>The unique system-assigned request number.</td>
</tr>
<tr>
<td>Title</td>
<td>The title of the requested item.</td>
</tr>
<tr>
<td>Material Bib Level</td>
<td>The material bib level (book, computer file, music, etc.) of the requested item.</td>
</tr>
<tr>
<td>Call Number</td>
<td>The call number of the requested item. If a call number was not supplied with the request, this field contains the word “Unknown”.</td>
</tr>
<tr>
<td>Request Type</td>
<td>The type of request, either Loan or Copy.</td>
</tr>
<tr>
<td>Disposition</td>
<td>The response provided to the request by the associated lender.</td>
</tr>
<tr>
<td>History Date</td>
<td>The date and time of the last change in status for the associated request.</td>
</tr>
</tbody>
</table>

## CONTU Copyright Tracking Reports

CONTU Copyright Tracking Reports are available only to staff members who have been granted ILL Staff permissions (see the User Administration User Guide for details).

The CONTU Copyright Tracking Reports option includes two summary reports and one detailed report.

### To generate a copyright tracking report:

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select ILL Statistics – CONTU Copyright Tracking Reports from the submenu displayed.
   - The CONTU Copyright Tracking Reports screen displays.

2. Enter the year for which you wish to view statistics in the Year of report text box.
   - The Year of report text box is pre-filled with the current calendar year by default. You may request a report for the current year, or for any of the three prior years. For example, in 2010 reports for calendar years 2007, 2008, 2009, and 2010 will be available. In 2011, the report for calendar year 2007 will be deleted.

3. Select the report type:
   - To generate a summary report, select the Order summary by filled count (filled count > 5) or the Order summary by title (all titles) radio button in the Summary reports field, as desired.
   - To generate a detailed report, select the Title begins with (leave blank for all titles) radio button in the Detailed report field. To generate the report for a specific title, enter the desired title in the associated text box.
Click the Submit button to submit the report request.

- The screen refreshes to display the requested report.

To view CONTU Copyright Tracking Reports:

- The Order Summary by Filled Count (filled count >5) provides a brief summary of the titles for which five or more requests have been filled or are outstanding for the specified calendar year. The report illustrates local demand for specific titles, which may inform collection development selection decisions. Each line in the report shows:
  - The Title from which the copy was requested
  - The number of requests for the title that have been filled (Number Filled)
  - The number of requests for the title that are in process (Number Outstanding)

- The Order Summary by Titles (all titles) lists the number of filled and outstanding requests for all titles. Each line in the report shows:
  - The Title from which the copy was requested
  - The number of requests for the title that have been filled (Number Filled)
  - The number of requests for the title that are in process (Number Outstanding)

- The Detailed Report provides detailed information on a “title-by-title” basis for both outstanding and completed requests. If the report is generated for all titles, statistics for each title are presented in separate sections. Each line in the report shows:
  - The Journal Title from which the copy was requested, followed by the International Standard Serial Number (ISSN), where applicable
  - The ISSN is shown only when an article from a title has been requested for the first time (the title has never been requested before). Once an article has been requested from a given title, the second and all subsequent requests for articles from the title will not show the ISSN.
  - The date on which the request was generated (Date of Request)
  - The date on which the request was filled (Date Filled) or the date on which the request entered the Unfilled status, was cancelled by staff (Date not Filled), or was filled by a loan.

If a request does not include a Date Filled or Date not Filled, it is considered a currently outstanding request.

- When an item is received, the statistics are updated to include the date received in the Date Filled column. In the event a request is not filled, the request is updated to Date not Filled on the day borrowing staff cancels a request or the request goes into the Unfilled status. If the lender updated a Non-returnable (copy) request to Shipped (returnable), the date shipped is recorded in the Request not Filled column as it is no longer a request that needs to be included in the CONTU count.

Requests with variant titles are not currently merged. If staff is aware of two variations of the same title, staff should download the detailed report, merge the titles, and calculate the number filled and not filled requests.
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- Receiving a Non-Returnable (copy) Request
  - When a non-returnable item is received, borrowing staff updates the ILL request to Received from the Shipped Status Browse screen. If the request has a copyright compliance value of ccg, the CONTU Copyright Tracking Report for the title is updated to include the date the article was filled, i.e., received. If the request has copyright compliance value of ccl, no copyright tracking is needed and no report is updated. The request moves to the Complete status and normal statistics are collected.

- Receiving a Non-Returnable (copy) Request as a Returnable (loan)
  - If the lender changes the Request Type from Non-returnable (copy) to Returnable (loan), and if the copyright compliance value was ccg, the request is not included in the CONTU report. The CONTU Copyright Tracking Report records the date in the Date not Filled column as it was not filled with a copy.

Beginning a New Calendar Year

Each January 1st, summary and detailed reports from the previous calendar year(s) are accessible. If an item was not received by December 31st of the year in which it was requested, it will not be recorded or counted in the next calendar year. It will be considered an “unfilled” request, although no date will be added to the Date not Filled column. For example, if a library requested six articles from a journal title in 2007 and received five by December 31st, the library would not be liable for copyright payments or reporting to the Copyright Clearance Center on the sixth article because it was received in 2008, not in 2007. The Detailed Report will still include the Date of Request for that item, but will not have a Date Filled or Date not Filled value as the report was “frozen” as of December 31st.

Exporting Participant Records

The Download Participant Records option lets you export selected data fields from the Participant Records of one or more selected libraries within your consortium or collective. Data is exported to a Microsoft Excel (.xlsx) file for download to a local workstation. The specific libraries for which you can export Participant Record data depends on your user type (see the User Administration User Guide for more information):

- Library SuperUsers – can export Participant Record data for their library only.
- Regional SuperUsers – can export Participant Record data for any library with which they are associated (see Exporting Participant Records on page 67 for details).
- Customer SuperUser - can export Participant Record data for any library in a consortium or collective (see Exporting Participant Records on page 67 for details).

To export your Participant Record:

1. From the Statistics menu (see The Statistics Menu on page 2 for details), select ILL Statistics – Download Participant Records.
   - The Export Participant Data screen displays.
2. Use the Select fields to be exported to this report checkboxes to select the data fields you wish to include in the export file.

Available data fields are grouped according to their associated headings in the Participant Record.
• A checkmark ✓ indicates the associated field will be included in the export file.
• An empty checkbox □ indicates the associated field will not be included in the export file.
• Clicking a checkbox repeatedly will toggle it on and off.
• Select the checkbox for a heading to select all checkboxes within the heading.
• Click the Select All Fields link to select all Select fields to be exported to this report checkboxes.
• Click the Deselect All Fields link to deselect all Select fields to be exported to this report checkboxes.

3. Use the Select libraries to be exported to this report checkboxes to select the libraries you wish to include in the export file.

The Select libraries to be exported to this report field shows the library with which your User Account is associated.

• A checkmark ✓ indicates the library will be included in the export file.
• An empty checkbox □ indicates the library will not be included in the export file.
• Clicking the checkbox repeatedly will toggle it on and off.

4. When all desired options have been selected, click the Submit button.
• Use the standard procedures for your web browser to download the file to a local workstation.

Generating Borrower Reports

The system maintains a database that contains records for each active and each completed ILL request handled by your library as a Borrower. You can access the information contained in this database using the Borrower Statistics, Borrower Record Counts, and Borrower Days to Receive Report options under ILL Statistics. These reports are useful in tracking ILL activity for your library, and for determining the efficiency with which ILL requests are processed and filled by lenders. You can choose to generate summary reports for all libraries in a consortium or collective or to generate reports for a single specified library.

The Borrower Statistics Report

The Borrower Statistics report shows the number of all active and completed ILL requests created and processed by your library, as a borrower from other participant libraries, for a given time period. This report counts actions taken on active requests in the specified time period. After the specified time period has passed, these numbers do not change.
You can generate Borrower Statistics reports for either weekly or monthly periods, and can specify the start and end dates for the selected period. In contrast, the Borrowing Activity report available through the Activity and Request Reports option reports activity on a particular set of requests based on the origination date of the request. After the specified period, the status of these requests can change, so the Borrower Statistics report and the Borrowing Activity report available through the Activity and Request Reports option may be inconsistent from day to day until all activity on the request has ceased.

Statistics are provided separately for both returnable (borrow) and non-returnable (copy) requests, and indicate the total number of ILL requests submitted, number of requests filled, number of requests (items) filled, the average days to receive, and the number of requests rejected (and the reason for rejection). Statistics reports for periods prior to or following the currently selected period can be easily accessed from the Statistics display.

The Borrower Statistics report provides the following information:

- **Requests submitted**: Shows the number of ILL requests submitted by your library as a borrower using the ILL Request Form or Blank Request Form during the specified report period.
- **Requests filled**: Shows the number of borrowed items marked as Shipped to your library as a borrower by the lending library during the specified report period.
- **Items received**: Shows the number of Shipped items updated to Received status by your library as a borrower during the specified report period.
- **Average days to receive**: For requests marked as Received by your library as a borrower during the specified report period, shows the average number of days between the date an item was marked as Shipped by the lending library and the date the item was marked as Received by your library as a borrower.
- **Requests rejected**: Shows the number of Renewal requests submitted by your library as a borrower that were rejected by the lending library during the specified report period.
- **Cancelled**: Shows the number of ILL requests submitted that were subsequently cancelled by your library as a borrower.

For requests submitted by your library as a borrower that were not filled by a lender, shows the number of requests that were not filled for the following reasons:
- Not in collection
- Not on shelf
- Not lendable
- Not responded to
- Not copyable

To view statistics for ILL requests processed as a lender, you must use the Lender Statistics option.

To view the Borrower Statistics report:

1. From the Statistics menu (see The Statistics Menu on page 2 for details), select ILL Statistics – Borrower Statistics.
   - The Borrower Statistics screen displays.

2. Enter or edit the code assigned by Auto-Graphics for the library whose statistics you wish to view, in the Library Code text box. The Library Code text box initially contains the code for the library under which you logged in.
   - To generate a summary report for all libraries, enter the word “SUMMARY” in the Library Code text box.
3. Select the period interval for which you wish to view statistics from the View By menu, either Weekly or Monthly. The default period is Weekly. Only one week or month can be selected.

4. Enter or edit the beginning and ending dates for the report in the Start Date and End Date text boxes.
   - Enter dates using the format MM/DD/YYYY, including slashes. The default start date is the first day of the current week (for this report, Sunday is considered the first day of the week). The default end date is the last day of the current week. The earliest date for which you can retrieve reports is determined by the extent of your system’s data records. Always use the first day of any given period (week or month) as the start date. If any other day is entered, the start date will revert to the first day of the period in which that date occurs. Always use the last day of any given period (week or month) as the end date. If any other day is entered, the end date will revert to the last day of the period for which the report is requested.

5. Click the Submit button. (To return the Borrower Statistics screen to its initial setting, click the Reset button.)
   - The screen displays the Borrower Statistics report for the selected library and time period.
   - If you enter a date range for which statistics do not exist, the Start Date and End Date default to the closest period for which statistics are available.
   - If you enter an invalid Library Code, the message “No Statistics available for this Library Code or Date.” displays. Click Go Back to return to the previous screen and re-enter the Library Code.
   - You can view statistics reports for the selected library for other periods using the Previous Period and Next Period buttons. Click the Previous Period or Next Period button to scroll backwards or forwards through the statistics database one period at a time.

To print the Borrower Statistics report:

1. Click the Format to Print button.
   - An additional browser window opens, displaying the formatted statistics report.
2. Use the standard procedures for your web browser to print the report.
3. Close the formatted statistics report.

The Borrower Record Counts Report

The Borrower Record Counts report shows the number of all ILL requests made by your library to borrow materials or receive photocopies from other lenders. The requests are grouped according to current status. A summary of status categories for ILL requests (for both borrower and lender) is listed below.

To view the number of ILL requests received as a lender, you must use the Lender Record Counts option.
### ILL Status Definitions

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Approval</td>
<td>Request is awaiting approval before being sent to lenders. <em>Automatic Approval permissions may be set on a patron-by-patron basis or as an option setting to enable all requests to be sent directly to the first potential lender.</em></td>
</tr>
<tr>
<td>Pending</td>
<td>Request has been received by lender, but has not yet been acknowledged.</td>
</tr>
<tr>
<td>Conditional</td>
<td>Lender can supply the requested item subject to the condition(s) specified.</td>
</tr>
<tr>
<td>Not-Received/Overdue</td>
<td>Lender has sent an <strong>Overdue</strong> notification to borrower for an item that has not yet been received by borrower.</td>
</tr>
<tr>
<td>Pending Cancel</td>
<td>Borrower has indicated that the request is to be cancelled.</td>
</tr>
<tr>
<td>Will Supply/In Process</td>
<td>Request has been accepted by lender, but has not been filled.</td>
</tr>
<tr>
<td>Lost</td>
<td>Requested/borrowed item has been declared lost by either borrower or lender.</td>
</tr>
<tr>
<td>Shipped</td>
<td>Lender has shipped requested item to borrower.</td>
</tr>
<tr>
<td>Not Received</td>
<td>Borrower has not received item from lender, and deadline (days to supply) has passed.</td>
</tr>
<tr>
<td>Received</td>
<td>Borrower has received item from lender.</td>
</tr>
<tr>
<td>Recalled</td>
<td>Lender needs item returned before due date.</td>
</tr>
<tr>
<td>Awaiting Lenders</td>
<td>Lender List for the request is being populated by the system.</td>
</tr>
<tr>
<td>Renew Pending</td>
<td>Borrower requests loan renewal for item from lender.</td>
</tr>
<tr>
<td>Accepted Renewal</td>
<td>Lender allows borrower to renew loan.</td>
</tr>
<tr>
<td>Rejected Renewal</td>
<td>Lender denies renewal of loan.</td>
</tr>
<tr>
<td>Overdue</td>
<td>Borrower has not returned item to lender, and due date has passed.</td>
</tr>
<tr>
<td>Returned</td>
<td>Borrower has shipped item back to lender.</td>
</tr>
<tr>
<td>Retry</td>
<td>Lender suggests that borrower resubmit the ILL request at a later date.</td>
</tr>
<tr>
<td>Complete</td>
<td>Lender has received material returned by borrower (the ILL transaction is complete).</td>
</tr>
<tr>
<td>Unfilled</td>
<td>Borrower’s request has not/will not be filled by any participant lender.</td>
</tr>
<tr>
<td>Expired</td>
<td><strong>Need By</strong> date for the request has passed.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Request has been cancelled by borrower.</td>
</tr>
<tr>
<td>Renew/Overdue</td>
<td>Borrower requests loan renewal for item from lender and due date for the item has expired.</td>
</tr>
</tbody>
</table>

To view Borrower Record Counts:

1. From the **Statistics** menu (see **The Statistics Menu** on page 2 for details), select **ILL Statistics – Borrower Record Counts**.
   - The Borrower’s Record Counts screen displays.
2. Enter or edit the code assigned by Auto-Graphics, for the library whose record counts you wish to view in the **Search Library Code** text box. The **Search Library Code** text box initially contains the code for the library under which you logged in. (To clear the contents of the **Search Library Code** text box, click the **Reset** button).
   - To generate a summary report for all libraries, enter the word “SUMMARY” in the **Library Code** text box.
3. Click the Submit button.
   - The screen displays a summary of active and completed requests, indicating totals for each status category.

   If you enter an invalid Library Code, the message “Record Count not found” displays. Click the Go Back button to return to the Record Counts screen and re-enter the Library Code.

The Borrower Days to Receive Report

The Borrower Days to Receive Report provides historic data on the time taken for ILL requests submitted by your library as a borrower during a given report period to be filled and shipped by a lender (i.e., for your library to receive the requested material). Each report period is one month long. Reports can be requested for a single month or for a range of months. The Borrower Days to Receive Report displays summarized report data for each report period in chronological order, and a summary of all report periods at the end of the report. You can also generate a hard-copy printout of the Borrower Days to Receive Report.

To view historic data on the time taken to provide material requested as a lender, you must use the Lender Days to Supply Report option.

To request the Borrower Days to Receive Report:

   - The Borrower’s Days to Receive Report screen displays.

2. Enter or edit the beginning and ending dates for the report in the Start Date and End Date text boxes.
   - Enter dates using the format MM/DD/YYYY, including slashes. The default start date is the first day of the current month. The default end date is the last day of the current month. The earliest date for which you can retrieve reports is determined by the extent of your system’s data records.

   **Always** use the first day of any given month as the start date. If any other date of the month is entered, the start date will revert to the first day of the entered month for the requested report. **Always** use the last day of any given month as the end date. If any other date of the month is entered, the end date will revert to the last day of the entered month for the requested report.

3. Enter or edit the code for the library for which you wish to request the report in the Library Code text box. The Library Code text box initially contains the code for the library under which you logged in.
   - To generate a summary report for all libraries, enter the word “SUMMARY” in the Library Code text box.
Statistics User Guide

4. Click the Submit button to retrieve the Days to Receive Report. (To return the Borrower’s Days to Receive Report screen to its initial settings, click the Reset button.)

- The screen displays the Borrower’s Days to Receive Report for the selected library and time period.

If you enter a date range for which statistics do not exist, the message “No statistics available for this Library Code or Date.” displays when you submit your report request. Click Go Back to return to the previous screen and enter a new date range.

If you enter an invalid Library Code, the message “No Statistics available for this Library Code or Date.” displays. Click Go Back to return to the previous screen and re-enter the Library Code.

- Use the scroll bar as needed to view the entire Days to Receive Report.

- The Days to Receive Report displays summarized report data for each report period (month) in chronological order. The final entry in the report contains a summary of data for all periods in the report.

To print the Borrower Days to Receive Report:

1. Click the Format to Print button.
   
   - An additional browser window opens, displaying the formatted Borrower Days to Receive Report.

2. Use the standard procedures for your web browser to print the report.

3. Close the formatted Borrower Days to Receive report.

Generating Lender Reports

The system maintains a database that contains records for each active and each completed ILL request handled by your library as a Lender. You can access the information contained in this database using the Borrower Statistics, Borrower Record Counts and Borrower Days to Supply Report options under ILL Statistics. These reports are useful in tracking ILL activity for your library, and for determining the efficiency with which ILL requests are processed and filled. You can choose to generate summary reports for all libraries in a consortium or collective or to generate reports for a single specified library.

The Lender Statistics Report

The Lender Statistics report shows the number of all active and completed ILL requests received and processed by your library, as a lender to other participant libraries, for a given time period. This report captures the current status of active requests for a specific week or month. This report counts actions taken on active requests in the specified time period. After the specified time period has passed, these numbers do not change.

You can generate Lender Statistics reports for either weekly or monthly periods, and can specify the start and end dates for the selected period. In contrast, the Lending Activity report available through the Activity and Request Reports option reports on activity on a particular set of requests based on the origination date of the request. After the specified period, the status of these requests can change, so the Lender Statistics report and the Lending Activity report available through the Activity and Request Reports option may be inconsistent from day to day until all activity on the request has ceased.
Statistics are provided separately for both returnable (borrow) and non-returnable (copy) requests, and indicate the total number of ILL requests received, number of requests rejected (and the reason rejected), number of ILL requests filled, number of items supplied, and average number of days to supply. Statistics reports for periods prior to or following the currently selected period can be easily accessed from the Statistics display.

The **Lender Statistics** report provides the following information:

- **Requests received:** Shows the number of ILL requests received (placed in Pending status) by your library as a lender during the specified report period.

- **Requests filled:** For Books, shows the number of items returned from borrowing libraries that were checked in by your library during the specified report period. For Copies, shows the number of times the borrowing library marked a Shipped item supplied by your library as Received during the specified report period.

- **Items supplied:** Shows the number of ILL requests updated to Shipped status by your library as a lender during the specified report period.

- **Average days to supply:** For requests marked as Shipped by your library as a lender during the specified report period, shows the average number of days between the date a request was received by your library as a lender and the date the request was marked as Shipped.

- **Requests rejected:** Shows the number of Renewal requests received by your library as a lender that were rejected by your library during the specified report period.

- **Cancelled:** Shows the number of cancel requests received by your library as a lender that were updated to Confirm cancel.

- For requests received by your library as a lender that were not supplied to a borrower, shows the number of requests that were not filled for the following reasons:
  - Not in collection
  - Not on shelf
  - Not lendable
  - Not responded to
  - Not copyable

To view statistics for ILL requests processed as a borrower, you must use the **Borrower Statistics** option.

**To view the Lender Statistics report:**

1. From the **Statistics** menu (see The Statistics Menu on page 2 for details), select **ILL Statistics – Lender Statistics**.
   - The Lender Statistics screen displays.
2. Enter or edit the code assigned by Auto-Graphics for the library whose statistics you wish to view, in the **Library Code** text box. The Library Code text box initially contains the code for the library under which you logged in.
3. Select the period interval for which you wish to view statistics from the **View By** menu: either **Weekly** or **Monthly**. The default period is **Weekly**. Only one week or one month can be selected.

4. Enter or edit the beginning and ending dates for the report in the **Start Date** and **End Date** text boxes.
   - Enter dates using the format MM/DD/YYYY, *including* slashes. The default start date is the first day of the current week (for this report, Sunday is considered the first day of the week). The default end date is the last day of the current week. The earliest date for which you can retrieve reports is determined by the extent of your system’s data records.

   *Always* use the first day of any given period (week or month) as the start date. If any other day is entered, the start date will revert to the first day of the period in which that date occurs. *Always* use the last day of any given period (week or month) as the end date. If any other day is entered, the end date will revert to the last day of the period on which the report is requested.

5. Click the **Submit** button. (To return the Lender Statistics screen to its initial setting, click the **Reset** button.)
   - The screen displays the Lender Statistics report for the selected library and time period.
     - If you enter a date range for which statistics *do not* exist, the **Start Date** and **End Date** default to the closest period for which statistics are available.
     - If you enter an invalid Library Code, the message “No Statistics available for this Library Code or Date.” displays. Click **Go Back** to return to the previous screen and re-enter the **Library Code**.
     - You can view Statistics reports for the selected library for other periods using the **Previous Period** and **Next Period** buttons. Click the **Previous Period** or **Next Period** button to scroll backwards or forwards through the statistics database one period at a time.

**To print the Lender Statistics Report:**

1. Click the **Format to Print** button
   - An additional browser window opens, displaying the formatted statistics report.

2. Use the standard procedures for your web browser to print the report.

3. Close the formatted statistics report.

**The Lender Record Counts Report**

The **Lender Record Counts** report shows the number of *all* ILL requests received by your library to *lend* materials or supply photocopies to other libraries. The requests are grouped according to current status. A summary of status categories for ILL requests (for both borrower and lender) is listed below.

**To view the number of ILL requests submitted as a borrower, you must use the **Borrower Record Counts** option.**

### ILL Status Definitions

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Approval</td>
<td>Request is awaiting approval before being sent to participant lenders. <em>Automatic Approval permissions may be set on a patron-by-patron basis or as an option setting to enable all requests to be sent directly to the first potential lender.</em></td>
</tr>
<tr>
<td>Pending</td>
<td>Request has been received by lender, but has not yet been acknowledged.</td>
</tr>
<tr>
<td>Conditional</td>
<td>Lender can supply the requested item subject to the condition(s) specified.</td>
</tr>
</tbody>
</table>
### Statistics User Guide

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not-Received/Overdue</td>
<td>Lender has sent an <strong>Overdue</strong> notification to borrower for an item that has not yet been received by borrower.</td>
</tr>
<tr>
<td>Pending Cancel</td>
<td>Borrower has indicated that the request is to be cancelled.</td>
</tr>
<tr>
<td>Will Supply/In Process</td>
<td>Request has been accepted by lender, but has not been filled.</td>
</tr>
<tr>
<td>Lost</td>
<td>Requested/borrowed item has been declared lost by either borrower or lender.</td>
</tr>
<tr>
<td>Shipped</td>
<td>Lender has shipped requested item to borrower.</td>
</tr>
<tr>
<td>Not Received</td>
<td>Borrower has not received item from lender, and deadline (days to supply) has passed.</td>
</tr>
<tr>
<td>Received</td>
<td>Borrower has received item from lender.</td>
</tr>
<tr>
<td>Recalled</td>
<td>Lender needs item returned before due date.</td>
</tr>
<tr>
<td>Awaiting Lenders</td>
<td>Lender List for the request is being populated by the system.</td>
</tr>
<tr>
<td>Renew Pending</td>
<td>Borrower requests loan renewal for item from lender.</td>
</tr>
<tr>
<td>Accepted Renewal</td>
<td>Lender allows borrower to renew loan.</td>
</tr>
<tr>
<td>Rejected Renewal</td>
<td>Lender denies renewal of loan.</td>
</tr>
<tr>
<td>Overdue</td>
<td>Borrower has not returned item to lender, and due date has passed.</td>
</tr>
<tr>
<td>Returned</td>
<td>Borrower has shipped item back to lender.</td>
</tr>
<tr>
<td>Retry</td>
<td>Lender suggests that borrower resubmit the ILL request at a later date.</td>
</tr>
<tr>
<td>Complete</td>
<td>Lender has received material returned by borrower (the ILL transaction is complete).</td>
</tr>
<tr>
<td>Unfilled</td>
<td>Borrower’s request has not/will not be filled by any lender.</td>
</tr>
<tr>
<td>Expired</td>
<td><strong>Need By</strong> date for the request has passed.</td>
</tr>
<tr>
<td>Cancelled</td>
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</tr>
<tr>
<td>Renew/Overdue</td>
<td>Borrower requests loan renewal for item from lender <em>and</em> due date for the item has expired.</td>
</tr>
</tbody>
</table>

### To view Lender Record Counts:

1. From the Statistics menu (see *The Statistics Menu* on page 2 for details), select ILL Statistics – Lender Record Counts.

   - The Lender’s Record Counts screen displays.

2. Enter or edit the code assigned by Auto-Graphics for the library whose record counts you wish to view in the **Search Library Code** text box. The **Search Library Code** text box initially contains the code for the library under which you logged in. (To clear the contents of the **Search Library Code** text box, click the **Reset** button).

3. Click the **Submit** button.

   - The screen displays a summary of active and completed requests, indicating totals for each status category.

If you enter an invalid Library Code, the message “Record Count not found” displays. Click the **Go Back** button to return to the Record Counts screen and re-enter the **Library Code**.
The Lender Days to Supply Report

The **Lender Days to Supply Report** provides historic data on the time taken to fill ILL requests received by your library as a lender during a given report period (for the borrower to receive the requested material). Each report period is one month long. Reports can be requested for a single month or for a range of months. The **Lender Days to Supply Report** displays summarized report data for each report period in chronological order, and a summary of all report periods at the end of the report. You can also generate a hard-copy printout of the **Lender Days to Supply Report**.

To view historic data on the time take to receive materials requested as a borrower, you must use the **Borrower Days to Receive Report** option.

To request the Days to Supply Report:

1. From the Statistics menu (see *The Statistics Menu* on page 2 for details), select **ILL Statistics – Lender Days to Supply Report**.
   - The Lender’s Days to Supply Report screen displays.

2. Enter or edit the beginning and ending dates for the report in the **Start Date** and **End Date** text boxes.
   - Enter dates using the format MM/DD/YYYY, including slashes. The default start date is the first day of the current month. The default end date is the last day of the current month. The earliest date for which you can retrieve reports is determined by the extent of your system’s data records.
   - *Always* use the first day of any given month as the start date. If any other date of the month is entered, the start date will revert to the first day of the entered month for the requested report. *Always* use the last day of any given month as the end date. If any other date of the month is entered, the end date will revert to the last day of the entered month for the requested report.

3. Enter or edit the three- or four-character code for the library for which you wish to request the report in the **Library Code** text box. The Library Code text box initially contains the code for the library under which you logged in.

4. Click the **Submit** button to retrieve the Days to Supply Report. (To return the Days to Supply Report screen to its initial settings, click the **Reset** button.)
   - The screen displays the Lender’s Days to Supply Report for the selected library and time period.

If you enter a date range for which statistics do not exist, the message “No statistics available for this Library Code or Date.” displays when you submit your report request. Click the **Go Back** button to return to the previous screen and enter a new date range.

If you enter an invalid Library Code, the message “No Statistics available for this Library Code or Date.” displays. Click the **Go Back** button to return to the previous screen and re-enter the Library Code.
Use the scroll bar as needed to view the entire Days to Supply Report.

The Days to Supply Report displays summarized report data for each report period (month) in chronological order. The final entry in the report contains a summary of data for all periods in the report.

To print the Lender Days to Supply Report:

1. Click the Format to Print button.
   - An additional browser window opens, displaying the formatted Days to Supply Report.

2. Use the standard procedures for your web browser to print the report.

3. Close the formatted Days to Supply report.

Stayed Too Long Report

The Stayed Too Long Report generates a list of active ILL requests that have remained “idle” in a selected status for greater than a specified number of days. The report can be generated for either Borrower or Lender, for one or more status categories, and for one or more libraries within a consortium or collective. The report is generated in Microsoft Excel format.

To generate the Stayed Too Long Report:

   - The Stayed Too Long Report screen displays.

2. Select the ILL role for which you wish to generate the report from the Role menu, either Borrower or Lender.

3. Select the status(es) for which you wish to generate the report from the Status menu:

   The Status menu shows only those statuses applicable to the selected Role.

   - Using the left mouse button, click the status for which you wish to generate the report. The selected status is highlighted.
   - To select multiple statuses from the list, press and hold the <Ctrl> key, then use the left mouse button to click each status for which you wish to generate the report.
   - To select several contiguous statuses from the list, double-click and hold the left mouse button, then drag through the list to select the desired statuses.

4. Specify the “cutoff” period for the report using the Number of Days text box:

   - Requests that have remained in a selected Status for a period of time equal to or greater than the specified Number of Days will be included in the report.
5. Select the library or libraries for which you wish to generate the report from the list of available libraries:

- The library list shows the Library Type, Library Code and Library Name for all libraries in your consortium or collective. The list is initially sorted in alphabetical order by Library Code. If desired, you can reconfigure, sort and filter table content (see Sorting and Filtering Tables on page 12 for details).

- Use the associated checkboxes to select the libraries to be include in the report. You can include multiple libraries in a report.
  - A checkmark ✓ indicates the associated library is selected (will be included in the report).
  - An empty checkbox □ indicates the associated library is not selected (will not be included in the report).
  - Clicking a checkbox repeatedly will toggle it on and off.
  - Click the Select All Libraries link to select the checkboxes for all libraries in the list.
  - Click the Deselect All Libraries link to deselect the checkboxes for all libraries in the list.

6. Click the Submit button to submit your report request.

- When the report has completed, a File Download dialog displays.

7. Select the “save” option on the File Download dialog.

- A standard Save As dialog displays, with a unique filename assigned to the file.

8. If desired, edit the name for the file in the File name text box.

   Be sure to retain the .xlsx extension at the end of the file name.

9. Select the location in which you wish to save the file.

10. Click the Save button to download the file.

To view the Stayed Too Long Report:

The Stayed Too Long Report contains a separate entry for each ILL request included in the report. The report header provides a summary of the report criteria. Each entry is comprised of the following data fields:

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Code</td>
<td>The library code assigned to the library (borrower or current lender, as applicable).</td>
</tr>
<tr>
<td>Library Name (Code)</td>
<td>The full name of the library.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the ILL request.</td>
</tr>
<tr>
<td>Title</td>
<td>The title for which the ILL request was submitted.</td>
</tr>
<tr>
<td>Request ID</td>
<td>The system assigned Request ID for the ILL request.</td>
</tr>
<tr>
<td>Date of Status Change</td>
<td>The date on which the ILL request entered the current Status.</td>
</tr>
</tbody>
</table>
Chapter 3. VIEWING DATABASE STATISTICS

Overview

The Database Statistics function lets you access and view a variety of database and usage statistics for your library’s system. Six statistics reports are available:

- **Database Index Stats** - provide summary information related to your library's A-G database(s). Displayed statistics include general index statistics, qualifier statistics and locations statistics.

- **Database Field Stats** - provides general information related to the number of bibliographic and locations (holdings) record in your library’s database, and provides detailed MARC Field statistics for the entire database for your library.

  Customer SuperUsers may select to view MARC Field statistics for any selected library.

- **System Activities** - provides summary information related to your library's system for a specified report period. Displayed statistics include login data, search data, ILL request data and cataloging data.

  Customer SuperUsers may select to view System Activities statistics for any selected library.

- **Statistics Report** - lets you create specialized usage Statistics reports for your library’s system.

- **Graphical Statistics Report** - lets you create specialized summary Statistics reports for your library’s system. Each report is displayed as a “horizontal” bar graph, and includes a textual summary of displayed graphical statistics.

- **Graphical WebStats** - provides detailed Web statistics related to the access and use of your library's system.

  Graphical WebStats are available to Customer SuperUsers only.

Database Index Stats

Database Index Stats provide summary information related to your library's Union database(s). Displayed statistics include general index statistics, qualifier statistics and holdings statistics. Additionally, you may choose to download a copy of the statistics report to a local workstation, or send a copy of the statistics report to another user via email.

Viewing the Database Index Stats Report

To view Database Stats:

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select Database Statistics – Database Index Stats.
   - The Select Database screen displays.
   - The Select Database screen lists all Union databases for your library or consortium.
2. Click the name of the database for which you wish to generate the statistics report.
   - The Database Statistics screen for the selected database displays in an additional browser window.
     - From the Database Statistics screen, you may select to view All Stats either by Library Code or by Library Name, General Stats, Bib Records either by Library Code or by Library Name or Qualifier Stats.

3. Click the link for the statistics you wish to view.
   - The screen refreshes to display the selected statistics.

4. The report includes the following information:
   - **General Stats** - Shows the total number of bibliographic records in the selected database (Total Records), and the total number of index entries for each index (Title, Author, Subject, etc.) supported by your library's system.
     - Title: 40,626
     - Author: 40,626
     - Subject: 50,251
   - **Bib Records** - Shows the total number of holdings attached to bibliographic records in the selected database for each library in your consortium or collective, by library code; and the Total Holdings for all libraries listed.
     - JPSTEST - The JPS Test Library: 6
     - TESTSRS - The testers Library: 112
     - TESTSRSZ - The testers2 Library: 23,688
     - TESTSRS3 - The TESTSRS3 Library: 23,716
   - **Qualifier Stats** - Shows a listing, by qualifier type (Language, Media, Form, etc.), of all items in the selected database associated with a given qualifier. Click the name of a listed qualifier type (e.g., Language) to view the Qualifier Stats for the selected qualifier type.
     - Media
       - Books: 23,489
       - Computer Files: 4
       - Maps: 4
       - Music Scores: 15

**Saving the Database Index Stats Report**

You can save a copy of the currently displayed Database Stats report to a file on a network or local workstation.
To save the Database Stats report:

1. Submit a Database Stats report request for the desired report period (see Viewing the Database Index Stats Report on page 39 for details).

2. Click the Save button.
   - A File Download dialog displays.

3. Use the standard procedures for your browser to save the file to the desired location.

Emailing the Database Index Stats Report

You can email a copy of the currently displayed Database Stats report to yourself or to another user.

To email the Database Stats report:

1. Submit a Database Stats report request for the desired report period (see Viewing the Database Index Stats Report on page 39 for details).

2. Click the Email button.
   - The Email Address screen displays in an additional browser window.

3. Enter your email address (or the email address of the person to whom you wish to send the statistics report) in the Your Email Address text box.

4. Click the Send button to send a copy of the statistics report to the specified email address.
   - The Email Address screen closes automatically.

Database Field Stats

The Database Field Stats option lets you generate detailed reports related to the bibliographic records contained in your library’s A-G database. You may choose to view statistics for the complete database, or MARC field statistics for your library only. The report provides general information related to the number of bibliographic and locations (holdings) record in the entire database, and provides detailed MARC Field statistics for the entire database or for your library only (the library under which you logged in).

To generate a Database Field Statistics report:

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select Database Statistics – Database Field Stats.
   - The Select a Database screen displays.
   - The screen shows a listing of all A-G databases for your library.
2. Click the name of the database for which you wish to generate a statistics report.
   - The Database Field Statistics screen for the selected database displays in an additional browser window.
   - From the Database Field Statistics screen, you may select to view Statistics for Complete Database (by Library Code or by Library Name) or MARC Field Stats for your Library.

3. Click the link for the statistics you wish to view.
   - The screen refreshes to display the selected statistics.

4. The report includes the following information:
   - **General Stats** - shows the total number of bibliographic records in the selected database (Bib Records), the total number of locations (holdings) records (Holdings), the total number of bibliographic record to which no locations (holdings) are attached (Holderless Records) and the total of Holderless Records that include Tag 856, subfield u (Holderless Records with <856> $u$).

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Bib Records</td>
<td>196,180</td>
</tr>
<tr>
<td>Holdings</td>
<td>160,609</td>
</tr>
<tr>
<td>Holderless Records</td>
<td>43,791</td>
</tr>
<tr>
<td>Holderless Records with &lt;856&gt; $u$</td>
<td>503</td>
</tr>
</tbody>
</table>

   - **MARC Field Stats** - shows a listing of each MARC Tag occurring in at least one bibliographic record in the selected database, the total number of times the tag occurs in the database (Tag Occurrence) and the specific subfields (and number of times each subfield occurs) for each MARC Tag listed (Tag Content).

<table>
<thead>
<tr>
<th>Tag</th>
<th>Occurrence</th>
<th>Subfields</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td>196,180</td>
<td>a(196,180); b(195,772); c(161,149); d(2); e(4); f(212,28); g(3); h(4); k(5); l(2); m(975); n(1167); p(1167); q(4); r(11); s(1); t(1); u(1); v(1); w(1); x(1); y(1); z(1);</td>
</tr>
<tr>
<td>246</td>
<td>22,908</td>
<td>a(22,908); b(725); c(23); f(53); g(1); h(39); i(140); j(1); n(284); p(341);</td>
</tr>
<tr>
<td>247</td>
<td>29</td>
<td>a(29); n(2);</td>
</tr>
<tr>
<td>249</td>
<td>25</td>
<td>a(25); k(1);</td>
</tr>
</tbody>
</table>

   - **Library Holding Stats** - shows a listing of libraries (by Library Code and Library Name) for which at least one holding (location) is attached to a bibliographic record in the selected database, and shows the total number of Holdings (locations) in the selected database for the associated library.

<table>
<thead>
<tr>
<th>Library Code</th>
<th>Library Name</th>
<th>Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEMA</td>
<td>SEMA QA Code</td>
<td>24</td>
</tr>
<tr>
<td>NATM</td>
<td>American Textile History Museum (Lowell)</td>
<td>3,154</td>
</tr>
<tr>
<td>SAPH</td>
<td>Agawam Regional High School (Lakeville)</td>
<td>15,073</td>
</tr>
<tr>
<td>SEAWH</td>
<td>Archbishop Williams High School (Braintree)</td>
<td>1,372</td>
</tr>
</tbody>
</table>
• **MARC Field Stats for your Library** - shows a listing of each MARC Tag occurring in at least one bibliographic record in the selected database to which your library has a location (holding) attached, the total number of times the tag occurs in records to which your library has a location (holding) attached (Tag Occurrence) and the specific subfields (and number of times each subfield occurs) for each MARC Tag listed (Tag Content).

<table>
<thead>
<tr>
<th>Tag</th>
<th>Occurrence</th>
<th>Subfields</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td>196,250</td>
<td>a(3); b(196148); c(49527); d(16143); e(2); f(21228); g(9); h(5); i(2); j(1); k(1); l(1); m(1); n(1); o(1); p(1); q(1); r(1); s(1); t(1); u(1); v(1); w(1); x(1); y(1); z(1);</td>
</tr>
<tr>
<td>246</td>
<td>22,905</td>
<td>a(22894); b(725); c(23); d(53); e(1); f(1); g(1); h(144); i(1); j(1); k(1); l(1); m(1); n(1); o(1); p(1); q(1); r(1); s(1); t(1); u(1); v(1); w(1); x(1); y(1); z(1);</td>
</tr>
<tr>
<td>247</td>
<td>29</td>
<td>a(29); b(29);</td>
</tr>
<tr>
<td>249</td>
<td>25</td>
<td>a(25); b(25);</td>
</tr>
</tbody>
</table>

5. If desired, click the **Save** button to save a copy of the Database Field Stats report to a file on a network or local workstation (see **Saving the Database Field Stats Report** on page 43 for details).

6. If desired, click the **Email** button to email a copy of the Database Field Stats report to yourself or another user (see **Emailing the Database Field Stats Report** on page 43 for details).

**Saving the Database Field Stats Report**

You can save a copy of the currently displayed Database Field Stats report to a file on a network or local workstation.

**To save the Database Field Stats report:**

1. Submit a Database Field Stats report request for the desired database (see **Database Field Stats** on page 41 for details).
2. Click the **Save** button.
   - A File Download dialog displays.
3. Use the standard procedures for your browser to save the file to the desired location.

**Emailing the Database Field Stats Report**

You can email a copy of the currently displayed Database Field Stats report to yourself or to another user.

**To email the Database Field Stats report:**

1. Submit a Database Field Stats report request for the desired database (see **Database Field Stats** on page 41 for details).
2. Click the **Email** button.
   - The Email Address screen displays in an additional browser window.
3. Enter your email address (or the email address of the person to whom you wish to send the statistics report) in the **Your Email Address** text box.
4. Click the **Send** button to send copy of the statistics report to the specified email address.
   - The Email Address screen closes automatically.
System Activities

The **System Activities** function provides summary information related to your library's system for a specified report period. Displayed statistics include login data, search data, ILL request data and cataloging data. Additionally, you may choose to download a copy of the statistics report to a local workstation, or send a copy of the statistics report to yourself or another user via email.

**Viewing System Activity Statistics**

To view System Activity statistics:

1. From the **Statistics** menu (see *The Statistics Menu* on page 1 for details), select **Database Statistics – System Activities**.
   - The Select Report Period screen displays.
2. Enter the **starting date** for the report period in the **Start Date** text box.
   - Enter the **Start Date** using the format "mm/dd/yyyy", *including slashes*.
   - By default, the system enters the current calendar date as the **Start Date**.
3. Enter the **ending date** for the report period in the **End Date** text box.
   - Enter the **End Date** using the format "mm/dd/yyyy", *including slashes*.
   - By default, the system enters the current calendar date as the **End Date**.
4. Enter the desired **starting time** for the report period in the **Start Time** text box.
   - Enter the **Start Time** using the format "hh:mm:ss", *including colons*. Enter the **Start Time** using "24-hour" clock format.
   - By default, the system enters "00:00:00" as the **Start Time**.
5. Enter the desired **ending time** for the report period in the **End Time** text box.
   - Enter the **End Time** using the format "hh:mm:ss", *including colons*. Enter the **End Time** using "24-hour" clock format.
   - By default, the system enters "23:59:59" as the **Start Time**.
6. Click the **Submit** button to submit your report request.
   - The screen refreshes to display System Activity statistics for the requested report period. The report includes the following information:
     - The number of logins to the system, by user category (**Admin Logins** (library staff logins), **Patron Logins** and **Guest Logins**); and the **total** number of logins for all user categories (**Login Total**).
Search statistics are subdivided to show the number of unique search requests submitted, and the total number of searches performed. For example, submitting a Simple Search request with three databases selected would result in a Simple Search Request count of "1", and a Simple Search count of "3".

- The number of unique search requests submitted, by search type (Simple Search Request, Alpha Search Request, Advanced Search Request and Number Search Request); and the total number of unique searches submitted for all search types (Search Request Total).

A single search request submitted to multiple databases is counted as a unique request. For example, submitting a Simple Search request with three databases selected would result in a Simple Search Request count of "1".

- The number of searches performed, by search type (Simple Search, Alpha Search, Advanced Search, Number Search and Link Search); and the total number of searches performed for all search types (Search Total).

A single search request submitted to multiple databases is counted as multiple searches. For example, submitting a Simple Search request with three databases selected would result in a Simple Search count of "3".

- The number of ILL requests submitted through the system, by request method (ILL Request or ILL Blank Request); and the total number of ILL requests submitted for all request methods (ILL Total).

ILL statistics are shown for SHAREit systems only.

- The number of record download transactions through CAT Administration (Web Cat Downloads), the number of locations (holdings) maintenance activity transactions using CAT Administration or AGCat (Cat Holders Added, Cat Holders Changed, Cat Holders Deleted) and the number of bib record maintenance activity transactions performed using CAT Administration or AGCat (Cat Records Added, Cat Records Changed, Cat Records Deleted); and the total number of all cataloging maintenance transactions (CAT Total).

7. If desired, click the Save button to save a copy of the System Activities report to a file on a network or local workstation (see Saving the System Activities Report on page 45 for details).

8. If desired, click the Email button to email a copy of the System Activities report to yourself or another user (see Emailing the System Activities Report on page 46 for details).

Saving the System Activities Report

You can save a copy of the currently displayed System Activities report to a file on a network or local workstation.
Statistics User Guide

To save the System Activities report:

1. Submit a System Activities report request for the desired report period (see Viewing System Activity Statistics on page 44 for details).

2. Click the Save button.
   - A File Download dialog displays.

3. Use the standard procedures for your browser to save the file to the desired location.

Emailing the System Activities Report

You can email a copy of the currently displayed System Activities report to yourself or to another user.

To email the System Activities report:

1. Submit a System Activities report request for the desired report period (see Viewing System Activity Statistics on page 44 for details).

2. Click the Email button.
   - The Email Address screen displays in an additional browser window.

3. Enter your email address (or the email address of the person to whom you wish to send the statistics report) in the Your Email Address text box.

4. Click the Send button to send a copy of the statistics report to the specified email address.
   - The Email Address screen closes automatically.

Statistics Report

Understanding Statistics Report Parameters

The Statistics Report provides usage statistics for your library's system. Statistics Reports offer a high degree of flexibility in specifying the specific data you wish included in the report. However, certain parameter combinations are not compatible. If a report request containing incompatible parameters is submitted, an error message displays, identifying the incompatibility. Revise your report parameter selections as necessary, and resubmit the report request.

The following paragraphs provide an overview of the function of each report parameter, and identify the compatibility and limitations for each parameter, as appropriate. BE SURE to make compatible selections when specifying statistics report parameters.

Library Statistics Staff members and Library SuperUsers may request Statistics Reports for their library only; Customer SuperUsers may request individual Statistics Reports for any library, or a combination of Statistics Reports for multiple selected libraries. See Chapter 4, CUSTOMER SUPERUSER for details.

Report For: Determines the specific library for which the report will be generated. This field shows the name of the library under which you logged in.
Type of Report: Determines the format and arrangement of the report. You may also generate special reports listing the most frequently entered search terms. The following options are available:

- **Date Report (single/multiple):** Report is organized in chronological order, with separate lines for each month in the report period. Each line in the report includes the Year and Month for the associated report data. A grand TOTAL for all months in the report period is provided at the end of the report.

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Guest Logins</th>
<th>Patron Logins</th>
<th>Staff Logins</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>September</td>
<td>108</td>
<td>7</td>
<td>37</td>
</tr>
<tr>
<td>2013</td>
<td>October</td>
<td>58</td>
<td>5</td>
<td>47</td>
</tr>
<tr>
<td>2013</td>
<td>November</td>
<td>27</td>
<td>6</td>
<td>45</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>193</td>
<td>10</td>
<td>129</td>
</tr>
</tbody>
</table>

- **Database Report (single/multiple):** Report is organized in alphabetic order by Database name, with separate lines for each database in the report. A grand TOTAL for all databases in the report is provided at the end of the report.

  TOTALS are not included when the Output Report option for the Database Report is set to A File for Download.

- **Search Term Reports:** The following reports provide information related to the search terms that were most frequently submitted during the report period. Search terms are listed in inverse order (from most frequently submitted to least frequently submitted). A single line is provided for each search term. Each line in the report shows the Search Term along with the total number of times for which the term was searched (TotalSearch). Reports may be requested for a single search index (All Headings, Author, Subject, Title), or for all search indexes combined.

  - **Top 100 Search Terms:** Lists the 100 most frequently submitted search terms for all search indexes combined (All Headings, Author, Subject, Title).
  - **Top 100 Search All Headings:** Lists the 100 most frequently submitted search terms where All Headings was the selected search index (this includes all searches submitted using the Simple Search option).
  - **Top 100 Search Authors:** Lists the 100 most frequently submitted search terms where Author was the selected search index.
  - **Top 100 Search Subjects:** Lists the 100 most frequently submitted search terms where Subject was the selected search index.
  - **Top 100 Search Titles:** Lists the 100 most frequently submitted search terms where Title was the selected search index.
Start Date / End Date: Determine the time period for which statistics will be presented. The minimum report period is one day.

Content Includes: Determines the specific data contained in the report. The following options are available:

- **Login Data:** Report includes statistics for the number of logins to the system. Statistics are categorized by number of Guest Logins, Patron Logins and Staff Logins.

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Guest Logins</th>
<th>Patron Logins</th>
<th>Staff Logins</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>September</td>
<td>9</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>2006</td>
<td>October</td>
<td>0</td>
<td>0</td>
<td>24</td>
</tr>
<tr>
<td>2006</td>
<td>November</td>
<td>3</td>
<td>0</td>
<td>33</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>3</td>
<td>0</td>
<td>64</td>
</tr>
</tbody>
</table>

- **Search Data:** Report includes statistics for the number of searches performed. Statistics are categorized by Simple Searches, Advanced Searches (does not include searches of number indexes), Linked Searches (links selected on Full Record Displays), Alpha Searches (does not include searches of number indexes), Number Searches (Alpha Searches and Advanced Searches of number indexes only) and Database Views the sum of the number of searched databases for which search results were displayed, the number of times the database was accessed (displayed) by clicking a Web Link from the Resources menu, and the number of times the database was accessed (displayed) by clicking the URL link from the Resource Note associated with a database.

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Simple Searches</th>
<th>Advanced Searches</th>
<th>Linked Searches</th>
<th>Browse Searches</th>
<th>Number Searches</th>
<th>Database Views</th>
<th>Full Record Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>September</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>9</td>
<td>9</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>October</td>
<td>5</td>
<td>9</td>
<td>0</td>
<td>9</td>
<td>9</td>
<td>14</td>
<td>9</td>
</tr>
<tr>
<td>2006</td>
<td>November</td>
<td>6</td>
<td>13</td>
<td>1</td>
<td>9</td>
<td>9</td>
<td>20</td>
<td>6</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>15</td>
<td>22</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>38</td>
<td>15</td>
</tr>
</tbody>
</table>

- **CAT Data:** Report includes statistics for cataloging functions performed. Statistics are provided for both WebCAT and the AGCat Cataloging client. Statistics are categorized by records downloaded via WebCAT (WebCAT Downloads), locations added, edited or deleted using WebCAT (CAT Locations Added, WebCAT Locations Changed, CAT Locations Deleted), and bibliographic records added, edited or deleted using the AGCat Cataloging client (AGCat Records Added, AGCat Records Changed and AGCat Records Deleted).

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>WebCAT Downloads</th>
<th>CAT Locations Added</th>
<th>WebCAT Locations Changed</th>
<th>CAT Locations Deleted</th>
<th>AGCat Records Added</th>
<th>AGCat Records Changed</th>
<th>AGCat Records Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>August</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>September</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>October</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>November</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>7</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

- **ILL Data:** Report includes statistics for the number of ILL requests generated. Statistics are categorized by ILL Blank Requests (requests submitted using the Blank Request Form) and ILL Record Requests (requests submitted from a Full Record Display).

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>ILL Blank Requests</th>
<th>ILL Record Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>January</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>2004</td>
<td>February</td>
<td>1</td>
<td>17</td>
</tr>
<tr>
<td>2004</td>
<td>March</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>2004</td>
<td>April</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>15</td>
<td>21</td>
</tr>
</tbody>
</table>
Output Report To: Determines whether the report will be made available for viewing on The Screen, or will be saved to A File for Download.

Maximum number of records display per page: Determines the number of lines per page when Output Report To - The Screen is selected.

Requesting a Statistics Report

Library PAC Administration Staff members and Library SuperUsers may request Statistics Reports for their library only; Customer SuperUsers may request individual Statistics Reports for any library, or a combination Statistics Reports for multiple selected libraries. See Chapter 4, CUSTOMER SUPERUSER for details.

To request a Statistics Report:

Certain parameter combinations are not compatible (see Understanding Statistics Report Parameters on page 46 for details). If a report request containing incompatible parameters is submitted, an error message displays, identifying the incompatibility. Revise your report parameter selections as necessary, and resubmit the report request.

   - The Statistics Report screen displays.
   - The Report For field shows the name of the library under which you logged in.

2. Select the desired type of report from the Type of Report drop-down menu.

3. Select the starting date for the report period from the Start Date drop-down menus; select the ending date for the report period from the End Date drop-down menus.

4. Select the content you wish included in the report using the Content Includes checkboxes.
   - You may select multiple Content Includes checkboxes.

5. Select the desired output format for the report using the Output Report To radio buttons.

6. Enter the maximum number of lines you wish displayed on each page of the report in the Maximum number of records display per page text box.

   The Maximum number of records display per page is applied only when the Output Report To - The Screen option is selected. If you leave the text box blank, the report will be displayed on a single page.

7. When all desired report parameters have been entered, click the Submit button to submit your report request.
If you have omitted a mandatory field, or have made an invalid selection, an error message displays at the top of the Statistics Report entry screen. Modify the report parameters as necessary, then click the Submit button to resubmit your request.

- If you selected the Output Report To - The Screen radio button, the screen refreshes to display the Statistics Report Summary (see Viewing Statistics Reports on page 50 for details).
- If you selected the Output Report To - A File for Download radio button, the Statistics Report Download screen displays (see Downloading Statistics Reports on page 52 for details).

### Working with Saved Reports

If you wish to run the same report periodically (such as a weekly login report) you can use the Save Report As function to save the desired report parameters for recall and submission at a future date.

**To save Statistics Report parameters:**

2. Enter a name for the report in the Save Report As text box.
   - Be sure to make the name descriptive of the report function; such as "Login Stats - All Libraries".
3. Click the Save button to save the report parameters.
   - The screen refreshes, and the message "Report selections have been saved successfully" displays.

**To recall and submit a saved report:**

  - The screen refreshes to display the saved report parameters. The message "Report selections have been reloaded successfully" displays.
  - It may be necessary to modify one or more report parameters (such as the Start Date and End Date for the report period) prior to submitting the report request.
  - Click the Submit button to submit the report request.
    - If you selected the Output Report To - The Screen radio button, the screen refreshes to display the Statistics Report Summary (see Viewing Statistics Reports on page 50 for details).
    - If you selected the Output Report To - A File for Download radio button, the Statistics Report Download screen displays (see Downloading Statistics Reports on page 52 for details).

### Requesting a Daily Transaction Log

The daily transaction log provides detailed information related to login, search, cataloging and interlibrary loan transactions for all libraries within a consortium or collective for a selected one-month period (see Viewing the Daily Transaction Log on page 52 for details).
To request a Daily Transaction Log:


2. Select the month and year for which you wish to download the transaction log from the Date drop-down menus.

3. Click the Save button to submit your request.
   - The Daily Transaction Log Download screen displays (see Downloading Statistics Reports on page 52 for details).

Viewing Statistics Reports

When you submit a report request, and select the Output Report To - The Screen option, the Statistics Report Summary screen displays. Use the Statistics Report Summary screen to view the requested report, one page at a time.

To view a Statistics Report:

- A summary of the report criteria is shown at the top of the Statistics Report Summary screen. The summary includes the type of report, the libraries included in the report, the start and end dates for the report period and the content included in the report.

- Depending on the size of the report, the Go to Page section of the Summary screen includes links to one or more pages of the report.

- Click a page number link to view the associated page of the report.
  - The selected page of the report displays in an additional browser window.
  - The summary of the report criteria is repeated at the top of the screen.
  - The specific data shown in the report varies, depending on the parameters selected when the report request was submitted (see Understanding Statistics Report Parameters on page 46 for details).

- Click the button on the report screen to close the window and return to the Statistics Report Summary screen.
Statistics User Guide

Downloading Statistics Reports

When you submit a report request, and select the **Output Report To - A File for Download** option, or when you submit a request to download a Daily Transaction log, the Statistics Report Download screen displays, allowing you to download the report to a file on a local computer. The report is saved as a text (.TXT) file, in *tab-delimited* format, for import into a spreadsheet application such as Microsoft Excel.

To download a Statistics Report:

1. Using the *right-hand* mouse button, click the **Download Data** button.
   - A shortcut menu displays.
2. Select the “save” option on the File Download dialog.
   - A standard Save As dialog displays, with a *unique* filename assigned to the file.
3. If desired, edit the name for the file in the **File name** text box.
   - Be sure to retain the .txt extension at the end of the file name.
4. Select the location in which you wish to save the file.
5. Click the **Save** button to download the file.
   - Depending on your browser, a status dialog may display while the file is being downloaded. When the download is complete, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

Viewing the Daily Transaction Log

The daily transaction log provides detailed information related to login, search, cataloging and interlibrary loan transactions for all libraries defined in your system for a selected one-month period. The report is saved as a text (.TXT) file, in *tab-delimited* format, for import into a spreadsheet application such as Microsoft Excel.

To view the Daily Transaction Log:

The Daily Transaction Log is organized in chronological order, from oldest to most recent transaction, for the selected report period, with each transaction listed on a separate line. Each line in the Daily Transaction Log provides the following information:

- **tid** (transaction identifier) – the system-assigned transaction identifier number.
- **TranLogged** – the date and time at which the associated transaction took place.
- **Type** – numeric code identifying the specific type of transaction. **Type** identifiers for each transaction category (login, search, cataloging and interlibrary loan) are described below:

For login transactions by users who are granted access to *multiple* staff modules, the transaction is recorded for the user's *default* staff mode.
### Viewing Database Statistics

<table>
<thead>
<tr>
<th>Category</th>
<th>Type</th>
<th>In Library</th>
<th>Remote</th>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Login</strong></td>
<td>1</td>
<td>1</td>
<td></td>
<td>Patron Login</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>2</td>
<td></td>
<td>PAC Administration Login</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>3</td>
<td></td>
<td>ILL Administration Login</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>4</td>
<td></td>
<td>CAT Administration Login</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>5</td>
<td></td>
<td>Guest Login</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>6</td>
<td></td>
<td>User Administration Login</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>7</td>
<td></td>
<td>Library SuperUser Login</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>8</td>
<td></td>
<td>Customer SuperUser Login</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>9</td>
<td></td>
<td>UDMM Staff Login</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>10</td>
<td></td>
<td>Multi-Admin Login</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>101</td>
<td>101</td>
<td></td>
<td>Simple Search (Keyword)</td>
</tr>
<tr>
<td></td>
<td>103</td>
<td>103</td>
<td></td>
<td>Advanced Search (Keyword)</td>
</tr>
<tr>
<td></td>
<td>104</td>
<td>104</td>
<td></td>
<td>Number Search (through Advanced Search or Alpha Browse)</td>
</tr>
<tr>
<td></td>
<td>105</td>
<td>105</td>
<td></td>
<td>Alpha Browse (Keyword)</td>
</tr>
<tr>
<td></td>
<td>106</td>
<td>106</td>
<td></td>
<td>Linked Search</td>
</tr>
<tr>
<td></td>
<td>120</td>
<td>120</td>
<td></td>
<td>Database View</td>
</tr>
<tr>
<td></td>
<td>130</td>
<td>130</td>
<td></td>
<td>Full Record Views</td>
</tr>
<tr>
<td></td>
<td>140</td>
<td>140</td>
<td></td>
<td>Shelf Status Views</td>
</tr>
<tr>
<td></td>
<td>150</td>
<td>150</td>
<td></td>
<td>Search Term or all databases</td>
</tr>
<tr>
<td><strong>Cataloging</strong></td>
<td>210</td>
<td>210</td>
<td></td>
<td>Download (CAT Admin)</td>
</tr>
<tr>
<td></td>
<td>221</td>
<td>221</td>
<td></td>
<td>Change Location (CAT Admin)</td>
</tr>
<tr>
<td></td>
<td>231</td>
<td>231</td>
<td></td>
<td>Add Location (CAT Admin)</td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>241</td>
<td></td>
<td>Delete Location (CAT Admin)</td>
</tr>
<tr>
<td></td>
<td>311</td>
<td>311</td>
<td></td>
<td>Add Record (AGCat Client)</td>
</tr>
<tr>
<td></td>
<td>321</td>
<td>321</td>
<td></td>
<td>Change Record (AGCat Client)</td>
</tr>
<tr>
<td></td>
<td>331</td>
<td>331</td>
<td></td>
<td>Delete Record (AGCat Client)</td>
</tr>
<tr>
<td></td>
<td>341</td>
<td>341</td>
<td></td>
<td>Add Location (AGCat Client)</td>
</tr>
<tr>
<td></td>
<td>351</td>
<td>351</td>
<td></td>
<td>Delete Location (AGCat Client)</td>
</tr>
<tr>
<td></td>
<td>361</td>
<td>361</td>
<td></td>
<td>Change Location (AGCat Client)</td>
</tr>
<tr>
<td><strong>Interlibrary Loan</strong></td>
<td>401</td>
<td>401</td>
<td></td>
<td>Blank ILL Request</td>
</tr>
<tr>
<td></td>
<td>402</td>
<td>402</td>
<td></td>
<td>Full Record ILL Request</td>
</tr>
<tr>
<td><strong>IP Login</strong></td>
<td>501</td>
<td>501</td>
<td></td>
<td>GIP Login</td>
</tr>
<tr>
<td></td>
<td>502</td>
<td>502</td>
<td></td>
<td>GIP Success</td>
</tr>
<tr>
<td></td>
<td>503</td>
<td>503</td>
<td></td>
<td>GIP Failed</td>
</tr>
</tbody>
</table>

- **LibraryProfileKey** – license key assigned by Auto-Graphics for the library at which the associated transaction occurred.
- **AGLibID** – library code for the library at which the associated transaction occurred.
- **LibraryName** – name of the library at which the associated transaction occurred.
- **RecCount** – Not implemented.
**DatabaseName** – the name of the database to which the associated search request transaction was submitted (this field is blank for login transactions).

For search request transactions submitted *simultaneously* to multiple databases, a separate transaction is listed for *each* database.

**DatabaseType** - two-character code indicating the database type, as described below:

- **AG** - Union Catalog (Auto-Graphics' *Impact* database)
- **AV** - AGent VERSO
- **WB** - Web Database
- **WL** - Web Link
- **WS** - Web Service
- **XL** - Reference Site
- **ZZ** - Virtual Library (Z39.50 Site)

**SearchTerm1** – search string entered in the **Search For** text box for Simple Search and Alpha Browse; search string entered in the *first Search For* text box for Advanced Search.

**Index1** – numeric code indicating the search index selected for **SearchTerm1**. Index codes for each database and search type available through the system are described below:

<table>
<thead>
<tr>
<th>Database Type</th>
<th>Search Type</th>
<th>Index Code</th>
<th>Index Searched</th>
</tr>
</thead>
<tbody>
<tr>
<td>AG - Union Catalog</td>
<td>Keyword Index</td>
<td>1</td>
<td>All Headings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Author/Creator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>Subject</td>
</tr>
<tr>
<td></td>
<td></td>
<td>46</td>
<td>Notes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>49</td>
<td>Journal Title</td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>GMD</td>
</tr>
<tr>
<td></td>
<td>Number Index</td>
<td>5</td>
<td>AGCN</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6</td>
<td>ISBN</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7</td>
<td>ISSN</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>LCCN</td>
</tr>
<tr>
<td></td>
<td></td>
<td>38</td>
<td>GPO Sudoc Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>39</td>
<td>GPO Order Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>40</td>
<td>GPO Monthly Cat. Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>41</td>
<td>Original Control Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>43</td>
<td>GPO Item Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>44</td>
<td>GPO Report Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>45</td>
<td>GPO Ship List Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>47</td>
<td>Publisher Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>48</td>
<td>OCLC Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5007</td>
<td>Dewey Call Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5008</td>
<td>LC Call Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5018</td>
<td>Other Standard Identifier</td>
</tr>
</tbody>
</table>
### Statistics User Guide

#### Viewing Database Statistics

<table>
<thead>
<tr>
<th>Database Type</th>
<th>Search Type</th>
<th>Index Code</th>
<th>Index Searched</th>
</tr>
</thead>
<tbody>
<tr>
<td>AG - Union Catalog (cont)</td>
<td>Alpha Index</td>
<td>9</td>
<td>Author/Creator</td>
</tr>
<tr>
<td></td>
<td>(Browse)</td>
<td>10</td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11</td>
<td>Subject</td>
</tr>
<tr>
<td></td>
<td></td>
<td>42</td>
<td>All Headings</td>
</tr>
<tr>
<td>ZZ – Virtual Library (Z39.50)</td>
<td>Keyword</td>
<td>4</td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td></td>
<td>21</td>
<td>Subject</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1003</td>
<td>Author/Creator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1016</td>
<td>All Headings</td>
</tr>
<tr>
<td>XL – Reference Site</td>
<td>Keyword</td>
<td>1</td>
<td>All Headings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Author/Creator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>Subject</td>
</tr>
</tbody>
</table>

For Web Databases (WB) and Web Links (WL), this column always contains "0" (not applicable).

- **SearchTerm2** – search string entered in the second Search For text box for Advanced Search. If no search term was entered, this field is *blank*.
- **Index2** – numeric code indicating the search index selected for **SearchTerm2** (see **Index1**, above, for an explanation of index codes).
- **SearchTerm3** – search string entered in the third Search For text box for Advanced Search. If no search term was entered, this field is *blank*.
- **Index3** – numeric code indicating the search index selected for **SearchTerm3** (see **Index1**, above, for an explanation of index codes).
- **QScoping** – indicates whether or not a scoping qualifier was applied against the search. This field contains either "TRUE" (scoping qualifier was applied against the search) or "FALSE" (scoping qualifier was not applied against the search). Qualifiers are not valid with all databases.
- **QDate** – indicates whether or not a date qualifier was applied against the search. This field contains either "TRUE" (date qualifier was applied against the search) or "FALSE" (date qualifier was not applied against the search). Qualifiers are not valid with all databases.
- **QLanguage** – indicates whether or not a language qualifier was applied against the search. This field contains either "TRUE" (language qualifier was applied against the search) or "FALSE" (language qualifier was not applied against the search). Qualifiers are not valid with all databases.
- **QMedia** – indicates whether or not a media qualifier was applied against the search. This field contains either "TRUE" (media qualifier was applied against the search) or "FALSE" (media qualifier was not applied against the search). Qualifiers are not valid with all databases.
- **QForm** – indicates whether or not a form qualifier was applied against the search. This field contains either "TRUE" (form qualifier was applied against the search) or "FALSE" (form qualifier was not applied against the search). Qualifiers are not valid with all databases.
- **QMisc** – indicates whether or not a miscellaneous qualifier was applied against the search. This field contains either "TRUE" (miscellaneous qualifier was applied against the search) or "FALSE" (miscellaneous qualifier was not applied against the search). Qualifiers are not valid with all databases.
• **SearchID** – the system-generated search identification number.

For search request transactions submitted *simultaneously* to multiple databases, the *same SearchID* is listed for each database.

• **UserName** – the name of the user that performed the associated transaction.

• **InLib** – indicates whether the associated transaction was initiated “in library” or from a remote location. This field contains either "TRUE" (the associated transaction was initiated from within the library) or "FALSE" (the associated transaction was initiated from a remote location).

Only those workstations with registered “valid IP addresses” are logged as “in library” transactions. Valid IP ranges are managed from within the User Administration module (see the *User Administration User Guide* for more information).

• **DataID** – the database identification number for the associated database. All reference databases and web services are assigned a *unique* DataID. A "0" is shown for all other resources.

### Graphical Statistics Report

A “graphical” statistics reporting function provides usage statistics for your library's system. Data is displayed as a horizontal “bar” graph, and includes a textual summary of displayed graphical statistics. Reports may be viewed “on-screen” in HTML format, or may be downloaded or emailed in PDF or Excel (spreadsheet) format.

The Graphical Statistics Report offers a high degree of flexibility in specifying the specific data you wish included in the report. The following paragraphs provide an overview of the function of each report parameter.

Library Staff members and Library SuperUsers may request Graphical Statistics Reports for their library only; Customer SuperUsers may request individual Graphical Statistics Reports for any library within the consortium or collective, or a combination report for *all* libraries within the consortium or collective. See *Chapter 4, CUSTOMER SUPERUSER* for details.

### Understanding Graphical Statistics Report Parameters

The following paragraphs provide an overview of the function of each report parameter available through the Graphical Statistics Report Setup screen.

**Report For:** Determines the specific library (or libraries) for which the report will be generated. This field shows the name of the library under which you logged in.

**Type of Report:** Determines the type of report (Summary Report or Date Report), and includes *additional* options for generating special reports listing the most frequently entered search terms. The following options are available:

• **Library Summary:** Displays summary activity statistics for your library for the specified report period. Statistics are displayed for *In Library Count, Remote Count* and *Total Count*. The selected **Contents Includes** categories are shown on the vertical axis of the graph; activity counts for the selected categories are shown on the horizontal axis of the graph.
• **Date Report:** Displays summary activity statistics for all libraries selected in the Report For field for each month (or partial month) of the specified report period. Activity counts for the selected Contents Includes categories are shown on the horizontal axis of the graph; months included in the specified report period are shown on the vertical axis of the graph.

• **Search Term Reports:** The following reports provide information related to the search terms that were most frequently submitted during the report period. Search terms are listed in inverse order (from most frequently submitted to least frequently submitted). A single line is provided for each search term. Each line in the report shows the Search Term along with the total number of times for which the term was searched (TotalSearch). Reports may be requested for a single search index (All Headings, Author, Subject, Title), or for all search indexes combined.
  - **Top 100 Search Terms:** Lists the 100 most frequently submitted search terms for all search indexes combined (All Headings, Author, Subject, Title).
  - **Top 100 Search All Headings:** Lists the 100 most frequently submitted search terms where All Headings was the selected search index (this includes all searches submitted using the Simple Search option).
  - **Top 100 Search Authors:** Lists the 100 most frequently submitted search terms where Author was the selected search index.
  - **Top 100 Search Subjects:** Lists the 100 most frequently submitted search terms where Subject was the selected search index.
  - **Top 100 Search Titles:** Lists the 100 most frequently submitted search terms where Title was the selected search index.

**Start Date / End Date:** Determine the time period for which statistics will be presented. The minimum report period is one day.
**Content Includes**: Determines the *specific data* contained in the report. The following options are available:

**Library Summary** reports may include *multiple selections* from the **Content Includes** options. **Date Reports** can be requested for a *single selection only*.

- **Login Data**: Report includes statistics for the number of logins to the system. Statistics are categorized by number of **Guest Logins**, **Patron Logins** and **Staff Logins**.

- **Search Data**: Report includes statistics for the number of searches performed. Statistics are categorized by **Simple Searches**, **Advanced Searches** *(does not include searches of number indexes)*, **Link Searches** *(links selected on Full Record Displays)*, **Browse Searches** *(does not include searches of number indexes)*, **Number Searches** *(Alpha Searches and Advanced Searches of number indexes only)*, **Database Views** *(the sum of the number of searched databases for which search results were displayed, the number of times the database was accessed (displayed) by clicking a Web Link from the Resources menu, and the number of times the database was accessed (displayed) by clicking the URL link from the Resource Note associated with a database)*, **Total Searches** *(the combined total of Simple Searches, Advanced Searches, Link Searches, Browse Searches and Number Searches)*, **Full Record Views** and **Check Status Button Clicks** *(total number of times Shelf Status was checked from Full Record Displays)*.

- **CAT Data**: Report includes statistics for cataloging functions performed. Statistics are provided for both WebCAT and the AGCat Cataloging client. Statistics are categorized by records downloaded via WebCAT *(WebCAT Downloads)*, locations added, edited or deleted using WebCAT *(CAT Locations Added, WebCAT Locations Changed, CAT Locations Deleted)*, and bibliographic records added, edited or deleted using the AGCat Cataloging client *(AGCat Records Added, AGCat Records Changed and AGCat Records Deleted)*.

- **ILL Data**: Report includes statistics for the number of ILL requests generated. Statistics are categorized by **ILL Blank Requests** *(requests submitted using the Blank Request Form)* and **ILL Record Requests** *(requests submitted from a Full Record Display)*.

**Report Format**: Determines whether the report will be made available for viewing on the screen (or as a file for download), or will be emailed to a specified recipient. The following options are available:

- **View Report**: You may select to view the report in **HTML**, **PDF** or **Excel** *(spreadsheet)* format. If the **PDF** or **Excel** option is selected, you may choose to save the report to a local workstation prior to viewing.

  *Adobe Acrobat Reader Version 4.0 or higher must be installed on your workstation to view the report in **PDF** format. Microsoft Excel must be installed on your workstation to view the report in **Excel** format.*

- **Email Report**: You may select to email the report in **PDF** or **Excel** *(spreadsheet)* format to *one or more* specified recipients.

### Requesting a Graphical Statistics Report

Library Staff members and Library SuperUsers may request Graphical Statistics Reports for their library only; Customer SuperUsers may request individual Graphical Statistics Reports for any library within the consortium or collective, or a combination report for *all* libraries within the consortium or collective. See *Chapter 4, CUSTOMER SUPERUSER* for details.
To request a Graphical Statistics Report:

1. Select **Graphical Statistics Report** from the **Statistics** menu (see **The Statistics Menu** on page 1 for details).
   - The **Report For** field is read only, and shows the name of the library under which you logged in.

2. Select the desired type of report from the **Type of Report** drop-down menu.
   - Depending on the **Type of Report** selected, the report entry screen may refresh to display *only those options* appropriate to the selected **Type of Report**.

3. Enter the starting date for the report period in the **Start Date** text box; enter the ending date for the report period in the **End Date** text box.
   - Enter the **Start Date** and **End Date** using the format “MM/DD/YYYY”, i.e., “03/10/2006.”
   - **Be sure to include the slashes “/” when entering the Start Date and End Date. Do not include alphabetic characters when entering the Start Date and End Date.**
   - You may also click the calendar icon next to the **Start Date** or **End Date** text box to select a date using the Date Entry Calendar (see **Using the Date Entry Calendar** on page 60 for details).

4. Select the content you wish included in the report using the **Content Includes** options.
   - The **Content Includes** options are available for the **Library Summary** and **Date Report** reports only.
   - If **Library Summary** is selected from the **Type of Report** menu, you may select *multiple** Content Includes checkboxes.
   - If **Date Report** is selected from the **Type of Report** menu, you may select a *single** Content Includes radio button only.

5. Select the desired output format for the report using the **Report Format** radio buttons.
   - **To view** the report:
     - To view the report on-screen in HTML format, select the **View Report - HTML** radio button.
     - To view the report (or download the report for viewing) in Adobe Acrobat, select the **View Report - PDF** radio button.
     - To view the report (or download the report for viewing) in Microsoft Excel, select the **View Report - Excel** radio button.
   - **To email** the report:
     - **When an Email Report option is selected, the report entry screen refreshes to display the To and Subject text boxes.**
To email the report in Adobe Acrobat format, select the Email Report - PDF radio button.

To email the report in Microsoft Excel format, select the Email Report - Excel radio button.

Enter the recipient’s email address in the To text box. If you wish to send the records to more than one person, separate multiple email addresses with semicolons. Do not include spaces between email addresses.

Enter the desired subject line for the email in the Subject text box.

6. When all desired report parameters have been entered, click the Submit button to submit your report request.

If you have omitted a mandatory field, or have made an invalid selection, an error message displays. Modify the report parameters as necessary, then click the Submit button to resubmit your request.

- If you selected the View Report - HTML radio button, the report displays in an additional browser window (see Viewing Graphical Statistics Reports on page 60 for details).

- If you selected the View Report - PDF or View Report - Excel radio button, a File Download dialog displays (see Downloading Graphical Statistics Reports on page 61 for details).

- If you selected the Email Report - PDF or Email Report - Excel radio button, the message “The report result has been emailed to the following recipient(s) : (email address)” displays at the top of the report entry screen.

Using the Date Entry Calendar

The Graphical Statistics Report requires you to specify a starting and ending date for the report period. If you wish, you may use the Date Entry Calendar to select the report period starting and ending dates.

To select a date from the Date Entry Calendar:

1. Click the icon next to the date entry text box.
   - The Date Entry Calendar displays. The calendar shows the current day, month and calendar year.

2. Use the Month and Year drop-down menus to select the desired calendar month and year, or click the < and > buttons to scroll backwards and forwards one month at a time.

3. Click the desired date.
   - The Date Entry Calendar closes, and the selected date is automatically entered in the associated text box.

Viewing Graphical Statistics Reports

To view the Library Summary report:

- A summary of the report criteria is shown at the top of the report. The summary includes the type of report, the libraries included in the report, the start and end dates for the report period and the content included in the report.
- A “color key” specific to the report is shown immediately before the graphical data.

- Statistics are displayed for In Library Count, Remote Count and Total Count for each Contents Includes category. The selected Contents Includes categories are shown on the vertical axis of the graph; activity counts for the selected categories are shown on the horizontal axis of the graph.

- A textual summary of report data is shown following the graphical presentation of the data.

- Click the button on the report screen to close the window and return to the Graphical Statistics Report entry screen.

To view the Date Report:

- A summary of the report criteria is shown at the top of the report. The summary includes the type of report, the libraries included in the report, the start and end dates for the report period and the content included in the report.

- A “color key” specific to the report is shown immediately before the graphical data.

- Activity counts for the selected Contents Includes categories are shown on the horizontal axis of the graph; months included in the specified report period are shown on the vertical axis of the graph.

- A textual summary of report data is shown following the graphical presentation of the data.

- Click the button on the report screen to close the window and return to the Graphical Statistics Report entry screen.

Downloading Graphical Statistics Reports

When you submit a report request, and select the View Report - PDF or View Report - Excel option, a File Download dialog displays. You may choose to view the report immediately, or you may download the report to a file on a local computer.

To view the report:

- Select the “open” option on the File Download dialog.
  - The system downloads a temporary version of the report to your local workstation, launches the associated application, and displays the report.

Adobe Acrobat Reader Version 4.0 or higher must be installed on your workstation to view the report in PDF format. Microsoft Excel must be installed on your workstation to view the report in Excel format.
To save the report:

1. Select the “save” option on the File Download dialog.
   - A standard Save As dialog displays, with a unique filename assigned to the file.
2. If desired, edit the name for the file in the File name text box.
   
   Be sure to use the .pdf or .xls extension, as appropriate, at the end of the file name.

3. Select the location in which you wish to save the file.

4. Click the Save button to download the file.
   - Depending on your browser, a status dialog may display while the file is being downloaded. When the download is complete, a “Download Complete” message displays. Click the Close button to close the status dialog.
Chapter 4. CUSTOMER SUPERUSER

Activity and Request Reports

Activity and Request Reports provide detailed statistics related to the ILL activities for a selected library or group of libraries. You can specify the report period start and end dates, and can choose to exclude reports for sites with no ILL activity during the specified report period.

You may choose to generate reports for a library's borrowing activities, lending activities and/or net ILL activity (borrowing activity versus lending activity). Statistics are provided for both borrow and copy requests. You can also generate records of requests submitted as a borrower and/or responses provided to requests received as a lender for a selected library or group of libraries.

Depending on the specific report, you can view the report on-screen, view and download the report in PDF format, or download the report in Microsoft Excel format.

To generate Activity and Request Reports:

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select ILL Statistics – Activity and Request Reports.
   - The Activity and Request Reports screen displays.

2. Enter the starting date for the report period in the Start Date text box; enter the ending date for the report period in the End Date text box.
   - Enter the Start Date and End Date using the format “MM/DD/YYYY”, i.e., “03/10/2006.”
   - You may also click the icon next to the Start Date or End Date text box to select a date using the Date Entry Calendar (see Using the Date Entry Calendar on page 13 for details).

3. Select the desired format for the report(s) from the Select Format menu:
   - HTML – Reports are displayed on-screen in HTML format (see Viewing Reports “On Screen” on page 16 for details).
   - PDF – Reports are displayed on-screen in HTML format and in an additional browser window using the PDF Viewer (see Using the PDF Viewer on page 20 for details). PDF-formatted reports can be downloaded to a local workstation.
   - EXCEL – Reports are downloaded to a local workstation in Microsoft Excel format (see Downloading Reports and Records on page 21 for details).
4. Indicate the reports you wish to generate by selecting the appropriate Select Report Type checkboxes, as follows:

- You may select to generate one or more reports simultaneously.
  - A checkmark ✓ indicates the associated report is selected.
  - An empty checkbox □ indicates the associated report is not selected.
  - Clicking a checkbox repeatedly will toggle it on and off.

- **Borrowing Activity** - Provides activity statistics for the selected sites as borrowers.

- **Lending Activity** - Provides activity statistics for the selected sites as lenders.

- **Net Activity** - Provides a summary comparison of borrowing versus lending activity for the selected sites.

- **Request Records (Excel only)** - Provides a list of records for all requests submitted by the selected sites as borrowers.
  
  The Request Records (Excel only) checkbox is active only when EXCEL is selected from the Select Format menu. Request Records (Excel only) cannot be generated in HTML or PDF format.

- **Lender Response Records (Excel only)** - Provides a list of records for all responses to requests received by the selected sites as lenders.
  
  The Lender Response Records (Excel only) checkbox is active only when EXCEL is selected from the Select Format menu. Lender Response Records (Excel only) cannot be generated in HTML or PDF format.

5. Use the Select Libraries options to select the libraries for which you wish to generate reports.

- To generate reports for your library (the library under which you logged in) only, select the Current Library radio button. The Current Library text box shows the name of the library under which you logged in.

- To generate reports for all libraries in your consortium or collective, select the All Libraries radio button.

  When the All Libraries option is selected, reports are generated for all libraries in your consortium, regardless of the libraries shown in the Current Library or Selected Libraries fields.

- To generate reports for a specific library (or multiple libraries), select the Selected Libraries radio button. Click the Change Selection button to select the libraries for which reports will be generated.

  The Set Library Selection screen displays in an additional browser window.

  Depending on the arrangement of your consortium or collective, the Set Library Selection screen may include a combination of radio buttons, list boxes (Region or City, for example) and/or text boxes (Library Name Contains, for example) for specifying selection criteria. Make the desired
selection(s) from the appropriate list boxes and radio buttons, and enter text in the appropriate text boxes.

- To select all libraries from the Preferred Lender list in your library's Participant Record, select the Select All Libraries From My Preferred Lender List radio button.
- To select a specific library, or a group of libraries, click the Select Libraries Where radio button, and enter the appropriate selection criteria using the fields provided.
- When the desired selections have been made, click the Submit button to submit your selections. (Click the Reset button to return the Set Library Selection screen to its initial conditions if you wish to make changes to your selection criteria. Click the Close button to cancel the selection of libraries and return to the Activity and Request Reports screen.)
- The message “Activity Report Site Selection Successfully Completed” displays. Click the Close button to close the message and return to the Activity and Request Reports screen. The Selected Libraries text box refreshes to display the list of libraries for which reports will be generated.

If there are no matches to your selection criteria, the message “There were no matches to your selection criteria. Please verify your choices and reenter.” displays. Click Go Back to return to the Set Library Selection screen and revise your selection criteria.

- To clear the content of the Selected Libraries text box, click the Clear Selection button.

6. Indicate whether or not a report should be generated for sites with no ILL activity during the report period by selecting the appropriate Display each site even if statistics are zero radio buttons, as follows:

- yes - Reports will be generated for sites with no ILL activity.
- no - Reports will not be generated for sites with no ILL activity.

7. When all appropriate report criteria has been entered, click the Submit button to submit your report request.

**Summary Report**

The Summary Report function generates a report for download that shows summary statistics for the number of completed ILL requests processed by all libraries in a consortium or collective, as a borrower from other participant libraries and as a lender to other participant libraries. Summary Reports can be generated for either weekly or monthly periods.

**To generate a Summary Report:**

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select ILL Statistics - Summary Report.

- The Summary Reports data entry screen displays.
2. Enter beginning date for the report in the **Start Date** text box.
   
   • Enter the **Start Date** using the format MM/DD/YYYY, *including* slashes (for this report, Sunday is considered the first day of the week). The earliest date for which you can retrieve reports is determined by the extent of your system’s data records.

   *Always use the first day of any given period (week or month) as the start date. If any other day is entered, the **Start Date** will revert to the first day of the period for which report is requested.*

3. Select the period interval for which you wish to generate the report from the **View By** menu; either **Weekly** or **Monthly**.
   
   • The default period is **Weekly**.

4. Click the **Submit** button. (To return the summary Report screen to its initial setting, click the **Reset** button.)
   
   • The Summary Report screen refreshes to display the **Download** button (see *Downloading the Summary Report* on page 66 to download the Summary Report), and the **End Date** field is automatically filled with the ending date for the specified report period.

### Downloading the Summary Report

When you generate a Summary Report (see *Summary Report* on page 65 for details), a **Download** button displays.

**To download the Summary Report:**

1. Click the **Download** button on the Summary Report Screen.
   
   • A File Download dialog displays.

2. Select the “save” option.
   
   • A standard Save As dialog displays, with a *unique* filename assigned to the file.

3. If desired, edit the name for the file in the **File name** text box.
   
   *Be sure to retain the .txt extension at the end of the file name.*

4. Select the location in which you wish to save the file.

5. Click the **Save** button to download the file.
   
   • Depending on your browser, a status dialog may display while the file is being downloaded. When the download is complete, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

### Viewing the Summary Report

The Summary Report file contains a separate entry for each library in your consortium or collective, in alphabetic order, by library name. The **Date Range** field at the top of the report shows the period for which the report was generated. Each entry in the report is comprised of the following data fields:
## Data Field Description

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Code</td>
<td>The unique code assigned to the library for which statistics are shown.</td>
</tr>
<tr>
<td>Library Name</td>
<td>The name of the library for which statistics are shown.</td>
</tr>
<tr>
<td>Bwr_Req_Sub/Books</td>
<td>The number of borrow requests submitted by the associated library to all participant lenders during the report period.</td>
</tr>
<tr>
<td>Bwr_Req_Sub/Copies</td>
<td>The number of copy requests submitted by the associated library to all participant lenders during the report period.</td>
</tr>
<tr>
<td>Bwr_Req_Filled/Books</td>
<td>The number of borrow requests filled by all participant lenders (requests for which the status was updated to Shipped by the participant lender) for the associated library during the report period.</td>
</tr>
<tr>
<td>Bwr_Req_Filled/Copies</td>
<td>The number of copy requests filled by all participant lenders (requests for which the status was updated to Shipped by the participant lender) for the associated library during the report period.</td>
</tr>
<tr>
<td>Bwr_Items_Rcvd/Books</td>
<td>The number of items received in fulfillment of borrow requests (requests for which the status was updated to Received by the associated library) from all participant lenders during the report period.</td>
</tr>
<tr>
<td>Bwr_Items_Rcvd/Copies</td>
<td>The number of items received in fulfillment of borrow requests (requests for which the status was updated to Received by the associated library) from all participant lenders during the report period.</td>
</tr>
<tr>
<td>Lnd_Req_Rcvd/Books</td>
<td>The number of borrow requests received by the associated library from all participant borrowers during the report period.</td>
</tr>
<tr>
<td>Lnd_Req_Rcvd/Copies</td>
<td>The number of copy requests received by the associated library from all participant borrowers during the report period.</td>
</tr>
<tr>
<td>Lnd_Req_Filled/Books</td>
<td>The number of borrow requests filled by the associated library (requests for which the status was updated to Shipped by the associated library) for all participant borrowers during the report period.</td>
</tr>
<tr>
<td>Lnd_Req_Filled/Copies</td>
<td>The number of copy requests filled by the associated library (requests for which the status was updated to Shipped by the associated library) for all participant borrowers during the report period.</td>
</tr>
<tr>
<td>Lnd_Items_Supp/Books</td>
<td>The number of items supplied in fulfillment of borrow requests (requests for which the status was updated to Received by all participant borrowers) during the report period.</td>
</tr>
<tr>
<td>Lnd_Items_Supp/Copies</td>
<td>The number of items supplied in fulfillment of copy requests (requests for which the status was updated to Received by all participant borrowers) during the report period.</td>
</tr>
</tbody>
</table>

### Exporting Participant Records

The **Download Participant Records** option lets you export selected data fields from the Participant Records of one or more selected libraries within your consortium or collective. Data is exported to a Microsoft Excel (.xlsx) file for download to a local workstation. The specific libraries for which you can export Participant Record data depends on your user type (see the [User Administration User Guide](#) for more information):

- **Library SuperUsers** – can export Participant Record data for their library only (see **Exporting Participant Records** on page 25 for details).
- **Regional SuperUsers** – can export Participant Record data for any library with which they are associated.
- **Customer SuperUser** - can export Participant Record data for any library in a consortium or collective.

**To export your Participant Record:**

1. From the **Statistics** menu (see **The Statistics Menu** on page 2 for details), select **ILL Statistics – Download Participant Records**.
   - The Export Participant Data screen displays.
2. Use the **Select fields to be exported to this report** checkboxes to select the data fields you wish to include in the export file.

   Available data fields are grouped according to their associated headings in the Participant Record.

   - A checkmark ✓ indicates the associated field will be included in the export file.
   - An empty checkbox □ indicates the associated field will not be included in the export file.
   - Clicking a checkbox repeatedly will toggle it on and off.
   - Select the checkbox for a heading to select all checkboxes within the heading.
   - Click the **Select All Fields** link to select all **Select fields to be exported to this report** checkboxes.
   - Click the **Deselect All Fields** link to deselect all **Select fields to be exported to this report** checkboxes.

3. Use the **Select libraries to be exported to this report** checkboxes to select the libraries you wish to include in the export file.

   For Regional SuperUsers, the **Select libraries to be exported to this report** field shows all libraries with which your User Account is associated. For Customer SuperUsers, the **Select libraries to be exported to this report** field shows all libraries in your consortium or collective.

   - A checkmark ✓ indicates the associated library will be included in the export file.
   - An empty checkbox □ indicates the associated library will not be included in the export file.
   - Clicking the checkbox repeatedly will toggle it on and off.

4. When all desired options have been selected, click the **Submit** button.

   - Use the standard procedures for your web browser to download the file to a local workstation.

**Staff Login Activity Report**

The Staff Login Activity Report generates a list that shows the most recent login date for qualifying staff users (based on a specified cutoff date) at one or more selected libraries within your consortium or collective.

**To generate the Staff Login Activity Report:**

1. From the **Statistics** menu (see *The Statistics Menu* on page 2 for details), select **ILL Statistics – Staff Login Activity Report**.
   - The Staff Login Activity Report screen displays.
2. Select the desired format for the report from the Select Format menu:
   - **HTML** – Report is displayed on-screen in HTML format (see Viewing Reports “On Screen” on page 16 for details).
   - **PDF** – Report is displayed in an additional browser window using the PDF Viewer (see Using the PDF Viewer on page 20 for details). PDF-formatted report can be downloaded to a local workstation.
   - **EXCEL** – Report is downloaded to a local workstation in Microsoft Excel format (see Downloading Reports and Records on page 21 for details).

3. Enter the cutoff date for the report in the Last Login Date is on or Before text box.
   - The report will include only those staff members whose most recent login occurred on or before the date specified.
   - Enter the desired date using the format “MM/DD/YYYY”, i.e., “03/10/2018.”
   - Be sure to include the slashes “/” when entering the date. Do not include alphabetic characters when entering the date.
   - You may also click the icon next to the Last Login Date is on or Before text box to select a date using the Date Entry Calendar (see Using the Date Entry Calendar on page 13 for details).

4. Use the Select Libraries options to select the libraries for which the report will be generated:
   - **Current Library** – Report will be generated for the current library (the library under which you logged in) only.
   - **All Libraries** – Reports will be generated for all libraries in your consortium or collective.
   - **Use Selected Libraries** – Report will be generated for only those libraries selected from the list of available libraries.

5. If the Select Libraries – Use Selected Libraries option is chosen, select the library or libraries for which you wish to generate the report from the list of available libraries:
   - The library list shows the Library Type, Library Code and Library Name for all libraries in your consortium or collective. The list is initially sorted in alphabetical order by Library Code. If desired, you can reconfigure, sort and filter table content (see Sorting and Filtering Tables on page 12 for details).
   - Use the associated checkboxes to select the libraries to be include in the report. You can include multiple libraries in a report.
     - A checkmark ✅ indicates the associated library is selected (will be included in the report).
     - An empty checkbox ★ indicates the associated library is not selected (will not be included in the report).
Clicking a checkbox repeatedly will toggle it on and off.

Click the **Select All Displayed Libraries** link to select the checkboxes for *all* libraries in the list.

Click the **Deselect All Displayed Libraries** link to deselect the checkboxes for *all* libraries in the list.

6. Click the **Submit** button to submit your report request.

- If you selected **HTML** from the **Select Format** menu during report setup, the screen refreshes to display the **Staff Activity Report** screen.

- If you selected **PDF** from the **Select Format** menu during report setup, report content is displayed in the **PDF Viewer** in an *additional* browser window (see *Using the PDF Viewer* on page 20 for details).

- If you selected **Excel** from the **Select Format** menu during report setup, or when you click the **Download** button in the **PDF Viewer** (see *Using the PDF Viewer* on page 20 for details), a **File Download** dialog displays (see *Downloading Reports and Records* on page 21 for details).

**To view the Staff Activity Report:**

The Staff Activity Report contains a separate entry for *each* staff member included in the report. The report header provides a summary of the report criteria. Each entry is comprised of the following data fields:

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Name</td>
<td>The full name of the library.</td>
</tr>
<tr>
<td>Library Code</td>
<td>The library code assigned to the library.</td>
</tr>
<tr>
<td>Library Type</td>
<td>The library type assigned to the library.</td>
</tr>
<tr>
<td>Resource Group</td>
<td>The Resource Group with which the library is associated.</td>
</tr>
<tr>
<td>Staff Username</td>
<td>The username of the staff member.</td>
</tr>
<tr>
<td>Date of Last Login</td>
<td>The date of the most recent login by the associated staff member.</td>
</tr>
</tbody>
</table>

**Database Field Stats**

The **Database Field Stats** option lets you generate *detailed* reports related to the bibliographic records contained in you library’s RESEARCHit database. You may choose to view statistics for the complete database, or MARC field statistics for a selected library only. The report provides general information related to the number of bibliographic and locations (holdings) record in the entire database, and provides *detailed* MARC Field statistics for the entire database or for a selected library.
To generate a Database Field Statistics report:

1. From the Statistics menu (see The Statistics Menu on page 1 for details), select Database Statistics - Database Field Stats.
   - The Select a Database screen displays.
   - The screen shows a listing of all A-G databases for your library.

2. Click the name of the database for which you wish to generate a statistics report.
   - The Database Field Statistics screen for the selected database displays in an additional browser window.
   - From the Database Field Statistics screen, you may select to view Statistics for Complete Database (by Library Code or by Library Name) or MARC Field Stats by Library.

3. Click the link for the statistics you wish to view.
   - To view MARC Field Stats by Library, select the desired library from the drop-down menu, then click the Go button.

4. The screen refreshes to display the selected statistics. The report includes the following information:
   - **General Stats** - shows the total number of bibliographic records in the selected database (Bib Records), the total number of locations (holdings) records (Holdings), the total number of bibliographic record to which no locations (holdings) are attached (Holderless Records) and the total of Holderless Records that include Tag 856, subfield u (Holderless Records with <856> $u$).

<table>
<thead>
<tr>
<th>Bib Records</th>
<th>196,150</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holdings</td>
<td>163,859</td>
</tr>
<tr>
<td>Holderless Records</td>
<td>43,791</td>
</tr>
<tr>
<td>Holderless Records with &lt;856&gt; $u$</td>
<td>503</td>
</tr>
</tbody>
</table>

   - **MARC Field Stats** - shows a listing of each MARC Tag occurring in at least one bibliographic record in the selected database, the total number of times the tag occurs in the database (Tag Occurrence) and the specific subfields (and number of times each subfield occurs) for each MARC Tag listed (Tag Content).

<table>
<thead>
<tr>
<th>Tag</th>
<th>Occurrence</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td>196,150</td>
</tr>
<tr>
<td>246</td>
<td>22,908</td>
</tr>
<tr>
<td>247</td>
<td>29</td>
</tr>
<tr>
<td>249</td>
<td>26</td>
</tr>
</tbody>
</table>
• **Library Holding Stats** - shows a listing of libraries (by Library Code and Library Name) for which at least one holding (location) is attached to a bibliographic record in the selected database, and shows the total number of Holdings (locations) in the selected database for the library.

<table>
<thead>
<tr>
<th>SEMA</th>
<th>SEMA QA Code</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATM</td>
<td>American Textile History Museum (Lowell)</td>
<td>3,154</td>
</tr>
<tr>
<td>EAPH</td>
<td>Apponequet Regional High School (Lakeville)</td>
<td>15,073</td>
</tr>
<tr>
<td>EAWH</td>
<td>Archbishop Williams High School (Braintree)</td>
<td>1,372</td>
</tr>
</tbody>
</table>

• **MARC Field Stats by Library** - shows a listing of each MARC Tag occurring in at least one bibliographic record in the selected database to which your library has a location (holding) attached, the total number of times the tag occurs in records to which your library has a location (holding) attached (Tag Occurrence) and the specific subfields (and number of times each subfield occurs) for each MARC Tag listed (Tag Content).

5. If desired, click the **Save** button to save a copy of the Database Field Stats report to a file on a network or local workstation (see Saving the Database Field Stats Report on page 43 for details).

6. If desired, click the **Email** button to email a copy of the Database Field Stats report to yourself or another user (see Emailing the Database Field Stats Report on page 43 for details).

**System Activities**

The **System Activities** function provides summary information related to a library's RESEARCHit/SHAREit system for a specified report period. Displayed statistics include login data, search data, ILL request data (for SHAREit systems only) and cataloging data. Additionally, you may choose to download a copy of the statistics report to a local workstation, or send a copy of the statistics report to another user via email.

To view System Activity statistics:

1. From the **Statistics** menu (see The Statistics Menu on page 1 for details), select **Database Statistics – System Activities**.
   - The Select Report Period screen displays.

2. Enter the **starting date** for the report period in the **Start Date** text box.
   - Enter the **Start Date** using the format "mm/dd/yyyy", including slashes.
   - By default, the system enters the current calendar date as the **Start Date**.
3. Enter the *ending date* for the report period in the **End Date** text box.
   - Enter the **End Date** using the format "mm/dd/yyyy", *including slashes*.
   - By default, the system enters the current calendar date as the **End Date**.

4. Enter the desired *starting time* for the report period in the **Start Time** text box.
   - Enter the **Start Time** using the format "hh:mm:ss", *including colons*. Enter the Start Time using "24-hour" clock format.
   - By default, the system enters "00:00:00" as the Start Time.

5. Enter the desired *ending time* for the report period in the **End Time** text box.
   - Enter the **End Time** using the format "hh:mm:ss", *including colons*. Enter the **End Time** using "24-hour" clock format.
   - By default, the system enters "23:59:59" as the Start Time.

6. Select the library for which you wish to view statistics from the **Library** menu.
   - You may view statistics for **All Libraries**, or for a **single, selected** library.

7. Click the **Submit** button to submit your report request.
   - The screen refreshes to display System Activity statistics for the requested report period. The report includes the following information:
     - The number of logins to the system, by user category (**Admin Logins** (library staff logins), **Patron Logins** and **Guest Logins**); and the **total** number of logins for all user categories (**Login Total**).
     - Search statistics are subdivided to show the number of unique search requests submitted, and the **total** number of searches performed. For example, submitting a Simple Search request with three databases selected would result in a **Simple Search Request** count of "1", and a **Simple Search** count of "3".
     - The number of unique search requests submitted, by search type (**Simple Search Request**, **Alpha Search Request**, **Advanced Search Request** and **Number Search Request**); and the **total** number of unique searches submitted for all search types (**Search Request Total**).
     - A **single** search request submitted to multiple databases is counted as a **unique** request. For example, submitting a Simple Search request with three databases selected would result in a **Simple Search Request** count of "1".
     - The number of searches performed, by search type (**Simple Search**, **Alpha Search**, **Advanced Search**, **Number Search** and **Link Search**); and the **total** number of searches performed for all search types (**Search Total**).
     - A **single** search request submitted to multiple databases is counted as **multiple** searches. For example, submitting a Simple Search request with three databases selected would result in a **Simple Search** count of "3".
The number of ILL requests submitted through the system, by request method (ILL Request or ILL Blank Request); and the total number of ILL requests submitted for all request methods (ILL Total).

ILL statistics are shown for SHAREit systems only.

The number of record download transactions through CAT Administration (Web Cat Downloads), the number of locations (holdings) maintenance activity transactions using CAT Administration or AGCat (Cat Holders Added, Cat Holders Changed, Cat Holders Deleted) and the number of bib record maintenance activity transactions performed using CAT Administration or AGCat (Cat Records Added, Cat Records Changed, Cat Records Deleted); and the total number of all cataloging maintenance transactions (CAT Total).

8. If desired, click the Save button to save a copy of the System Activities report to a file on a network or local workstation (see Saving the System Activities Report on page 45 for details).

9. If desired, click the Email button to email a copy of the System Activities report to yourself or another user (see Emailing the System Activities Report on page 46 for details).

Statistics Report

In addition to the standard options available to PAC Staff members and Library SuperUsers (see Understanding Statistics Report Parameters on page 46 for details), the following additional options are available to Customer SuperUsers:

Report For: Determines the specific library (or libraries) for which the report will be generated. The following options are available:

- **All Libraries** – Report will be generated for all libraries in your consortium or collective.
- **Lib Code** – Report will be generated for a single, selected library code.
- **With** – Report will be generated for all libraries whose names include the term (or terms) entered in the associated text box.
  - **Category Reports** – Some consortia may assign member libraries to "customer-specific" categories and subcategories, such as geographic location (region, city, etc.) or academic level (high schools, colleges, etc.). In these cases, additional "customer-specific" Report For options are provided as drop-down menus. Reports will be generated for all libraries who are members of the selected category. The default selection for "customer-specific" categories is All.

Type of Report: Determines the format and arrangement of the report. The following options are available to Customer SuperUsers only:

- **Library Code (multiple)** – Report data is listed in alphabetic order, by library code. A single line is provided for each library code. The report includes the **LibCode** (library code) and library **Name** for each library in the report. A grand TOTAL for all libraries is provided at the end of the report.
- **Library Name (multiple)** – Report data is listed in alphabetic order, by library name. A single line is provided for each library **Name**. A grand TOTAL for all libraries is provided at the end of the report.
- **Database Report (single/multiple)** – Report is sectionalized, in alphabetic order by database name, with separate sections for each database in the report. Within each section, report data is listed in alphabetic order, by library code. A single line is provided for each library code. Each line in the report includes the **Database** name, **LibCode** (library code) and library **Name**. A Subtotal is listed for each database in the report. A grand TOTAL for all databases in the report is provided at the end of the report.
• **Reference Report By Library Type (multiple)** – Report is organized in order by Library Type name with each Library Type sorted alphabetically by Database Type and each Database Type sorted numerically by Database ID. Separate lines are provided for each database in the report. A subtotal is provided for each Library Type, and a Grand Total for all Library Types in the report is provided at the end of the report.

• **Detailed Report (multiple)** – THIS FUNCTIONALITY IS UNDERGOING REDESIGN

  ○ **Category Report (single/multiple)** – Report is sectionalized, in alphanumeric order by category name, with separate sections for each category in the report. Within each section, report data is listed in alphabetic order, by library code. A single line is provided for each library code. Each line in the report includes the category name, LibCode (library code) and library Name. A Subtotal is listed for each region in the report. A grand TOTAL for all regions in the report is provided at the end of the report.

### Requesting a Statistics Report

To request a Statistics Report:

Certain parameter combinations are not compatible (see Understanding Statistics Report Parameters on page 46 for details). If a report request containing incompatible parameters is submitted, an error message displays, identifying the incompatibility. Revise your report parameter selections as necessary, and resubmit the report request.

   
   • The Statistics Report screen displays.

2. Use the Report For options to specify the library (or libraries) for which you wish to generate the statistics report:

   • Select the All Libraries radio button to generate the statistics report for all libraries in your consortium or collective.

   • Select the Lib Code radio button to generate the statistics report for a single, selected library. Select the desire library from the associated drop-down menu.

   • Select the With radio button to generate the statistics report for all libraries within your consortium or collective whose names contain a specified term. Enter the desired term in the associated text box.

   The Report For field may include other options (such as Region or County) as appropriate to your library or consortium.

3. Select the desired type of report from the Type of Report drop-down menu.

4. Select the starting date for the report period from the Start Date drop-down menus; select the ending date for the report period from the End Date drop-down menus.

5. Select the content you wish included in the report using the Content Includes checkboxes.
You may select multiple Content Includes checkboxes.

6. Select the desired output format for the report using the Output Report To radio buttons.

7. Enter the maximum number of lines you wish displayed on each page of the report in the Maximum number of records display per page text box.

The Maximum number of records display per page is applied only when the Output Report To - The Screen option is selected. If you leave the text box blank, the report will be displayed on a single page.

8. When all desired report parameters have been entered, click the Submit button to submit your report request.

If you have omitted a mandatory field, or have made an invalid selection, an error message displays at the top of the Statistics Report entry screen. Modify the report parameters as necessary, then click the Submit button to resubmit your request.

• If you selected the Output Report To - The Screen radio button, the screen refreshes to display the Statistics Report Summary (see Viewing Statistics Reports on page 51 for details).

• If you selected the Output Report To - A File for Download radio button, the Statistics Report Download screen displays (see Downloading Statistics Reports on page 52 for details).

Graphical Statistics Report

In addition to the standard options available to PAC Staff members and Library SuperUsers (see Understanding Graphical Statistics Report Parameters on page 56 for details), the following additional options are available to Customer SuperUsers:

Report For: Determines the specific library (or libraries) for which the report will be generated. The following options are available:

• All Libraries: Report will be generated for all libraries within your consortium

• Lib Code: Report will be generated for the single library code selected from the associated drop-down menu. The Lib Code menu lists all library codes for your consortium or collective. By default, the drop-down menu initially displays the library code for the library under which you logged in.

• With: Report will be generated for all libraries whose names include the term (or terms) entered in the associated text box.

Requesting a Graphical Statistics Report

To request a Statistics Report:


   • The Graphical Statistics Report entry screen displays.

2. Use the Report For options to specify the library (or libraries) for which you wish to generate the statistics report:

   • Select the All Libraries radio button to generate the statistics report for all libraries in your consortium or collective.

   • Select the Lib Code radio button to generate the statistics report for a single, selected library. Select the desire library from the associated drop-down menu.
Select the **With** radio button to generate the statistics report for all libraries within your consortium or collective whose names contain a specified term. Enter the desired term in the associated text box.

3. Select the desired type of report from the **Type of Report** drop-down menu.

- Depending on the **Type of Report** selected, the report entry screen may refresh to display only those options appropriate to the selected **Type of Report**.

4. Enter the starting date for the report period in the **Start Date** text box; enter the ending date for the report period in the **End Date** text box.

- Enter the **Start Date** and **End Date** using the format “MM/DD/YYYY”, i.e., “03/10/2006.”

  Be sure to include the slashes “/” when entering the **Start Date** and **End Date**. Do not include alphabetic characters when entering the **Start Date** and **End Date**.

  - You may also click the **icon next to the Start Date or End Date text box to select a date using the Date Entry Calendar (see Using the Date Entry Calendar on page 60 for details).**

5. Select the content you wish included in the report using the **Content Includes** options.

- The **Content Includes** options are available for the **Library Summary** and **Date Report** reports only.

- If **Library Summary** is selected from the **Type of Report** menu, you may select multiple **Content Includes** checkboxes.

- If **Date Report** is selected from the **Type of Report** menu, you may select a single **Content Includes** radio button only.

6. Select the desired output format for the report using the **Report Format** radio buttons.

- To view the report:
  - To view the report on-screen in HTML format, select the **View Report - HTML** radio button.
  - To view the report (or download the report for viewing) in Adobe Acrobat, select the **View Report - PDF** radio button.
  - To view the report (or download the report for viewing) in Microsoft Excel, select the **View Report - Excel** radio button.

- To email the report:
  - When an **Email Report** option is selected, the report entry screen refreshes to display the **To** and **Subject** text boxes.
  - To email the report in Adobe Acrobat format, select the **Email Report - PDF** radio button.
  - To email the report in Microsoft Excel format, select the **Email Report - Excel** radio button.
Enter the recipient’s email address in the **To** text box. If you wish to send the records to *more than one* person, separate multiple email addresses with semicolons. **Do not** include spaces between email addresses.

Enter the desired subject line for the email in the **Subject** text box.

7. When all desired report parameters have been entered, click the **Submit** button to submit your report request.

If you have omitted a mandatory field, or have made an invalid selection, an error message displays. Modify the report parameters as necessary, then click the **Submit** button to resubmit your request.

- If you selected the **View Report - HTML** radio button, the report displays in an *additional* browser window (see *Viewing Graphical Statistics Reports* on page 60 for details).

- If you selected the **View Report - PDF** or **View Report - Excel** radio button, a File Download dialog displays (see *Downloading Graphical Statistics Reports* on page 61 for details).

- If you selected the **Email Report - PDF** or **Email Report - Excel** radio button, the message “The report result has been emailed to the following recipient(s) : (email address)” displays at the top of the report entry screen.

**Graphical WebStats**

Graphical WebStats provides detailed Web statistics related to the access and use of your library's system. Available statistics include number of visitors, resources accessed, site activity, browsers and platforms utilized for access, etc. In most cases, statistics are available from the year 2000 to the current calendar month. You can choose to view statistics for a selected month, or summary statistics for a selected year.

**To view Graphical WebStats:**

1. From the **Statistics** menu (see *The Statistics Menu* on page 1 for details), select **Database Statistics - Graphical WebStats**.

   - The Select Report Period screen displays.

   - The screen displays a series of tables, one for each year for which statistics are available. Each table provides a link for viewing statistic for a given month, and a **Summary** option to view summary statistics for the entire year.

2. Select the period for which you wish to view statistics.

   - The Graphical WebStats report displays in an *additional* browser window.