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Making Statistics Work for You

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Eastern Great Lakes IUG

Objectives

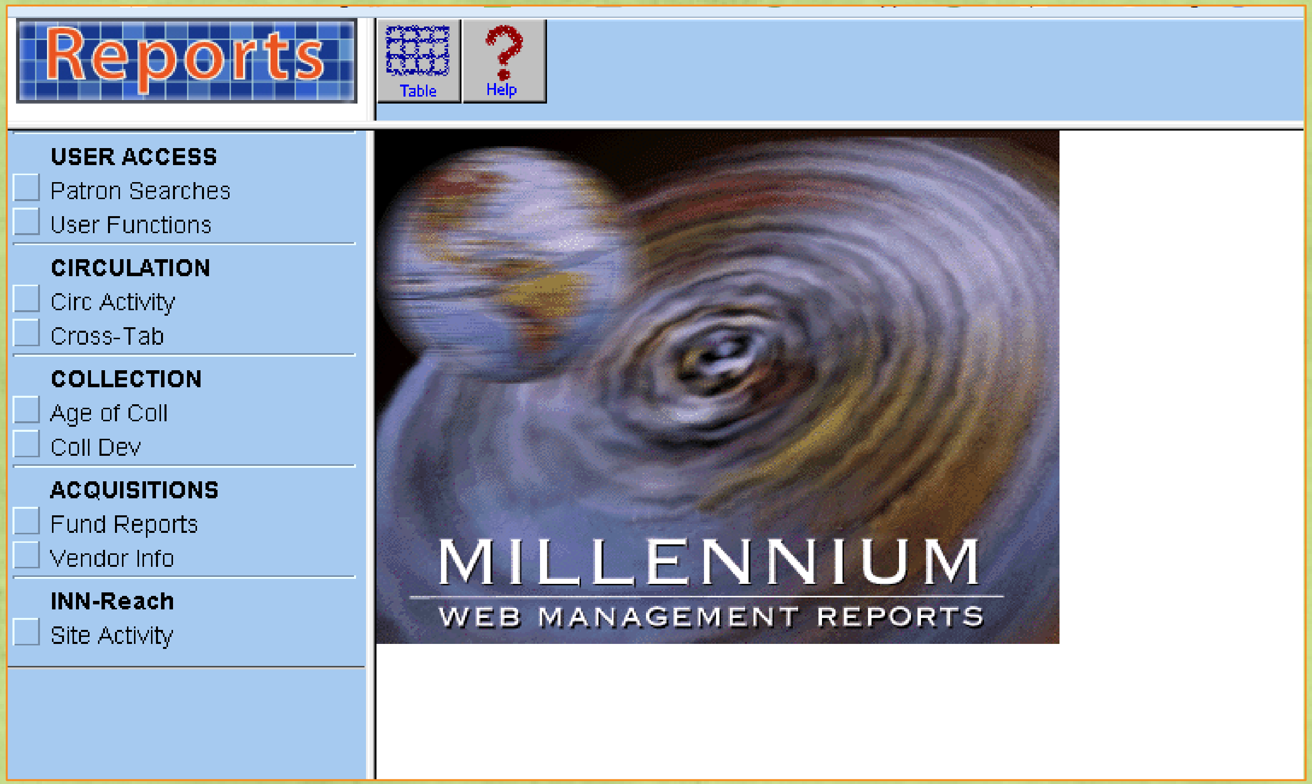
- Learn about the types of statistics and reporting tools available in Sierra/Millennium
- Discuss reporting for specific projects and initiatives
- Advice on avoiding disaster
- How to find additional help

Reporting and Statistics Options

Web Management Reports

- Collections
- Circulation
- Users
- Acquisitions

Reporting and Statistics Options

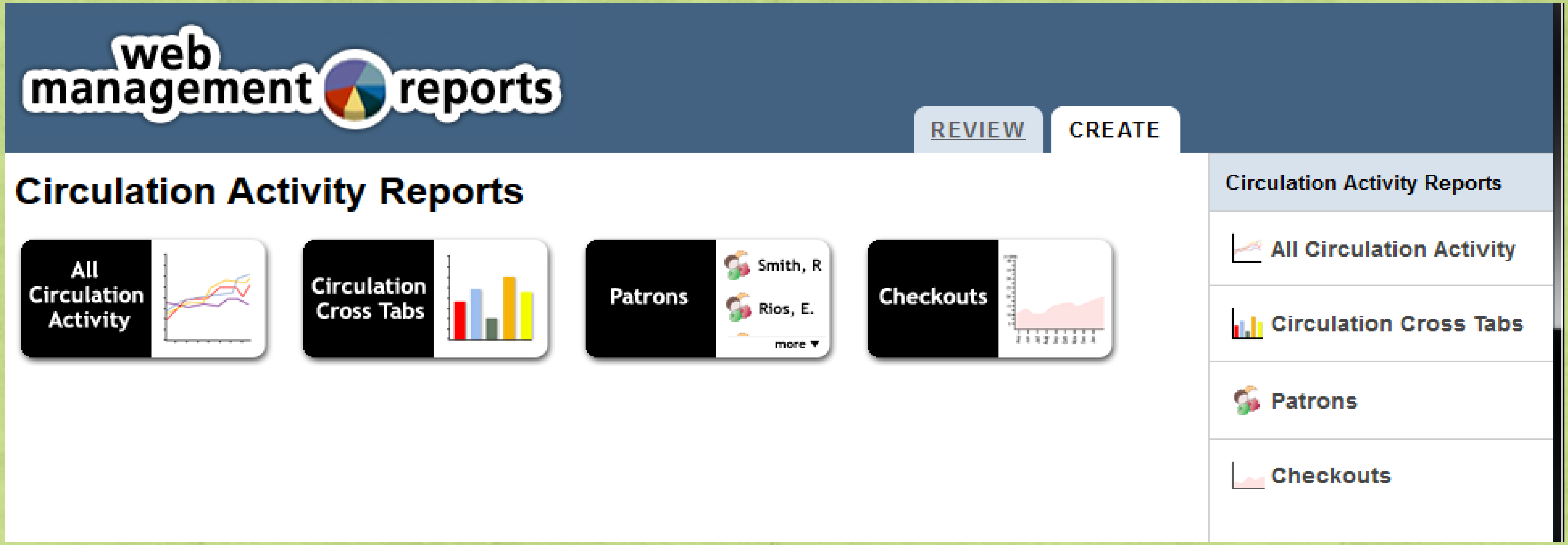


Reporting and Statistics Options

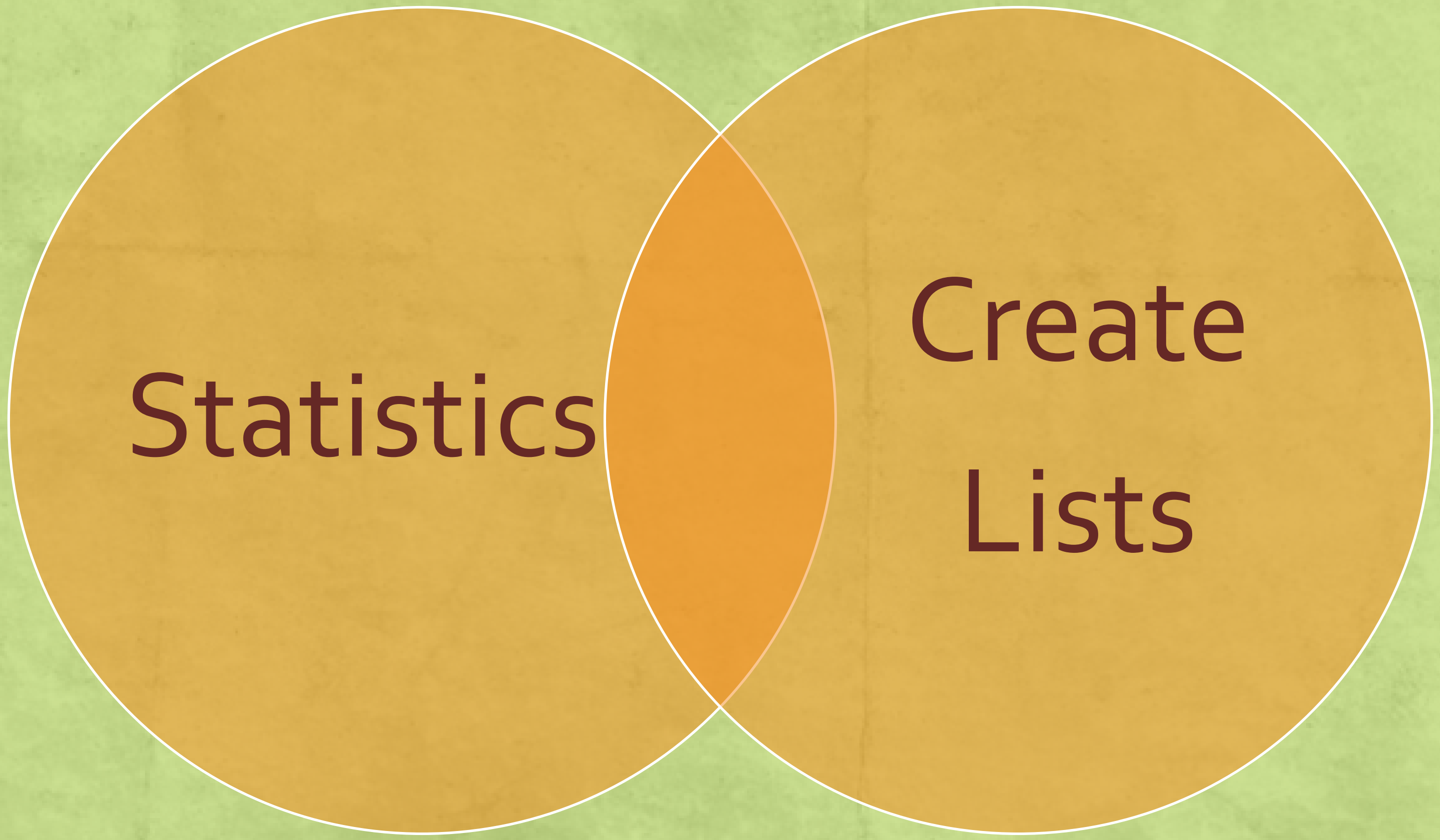
Circulation Statistics

- Browser
- Spreadsheet

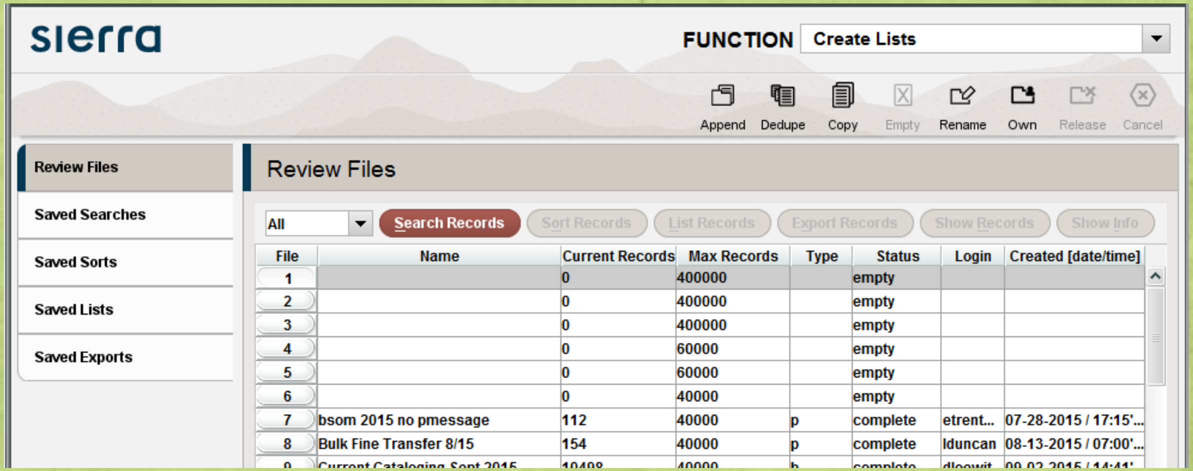
Reporting and Statistics Options

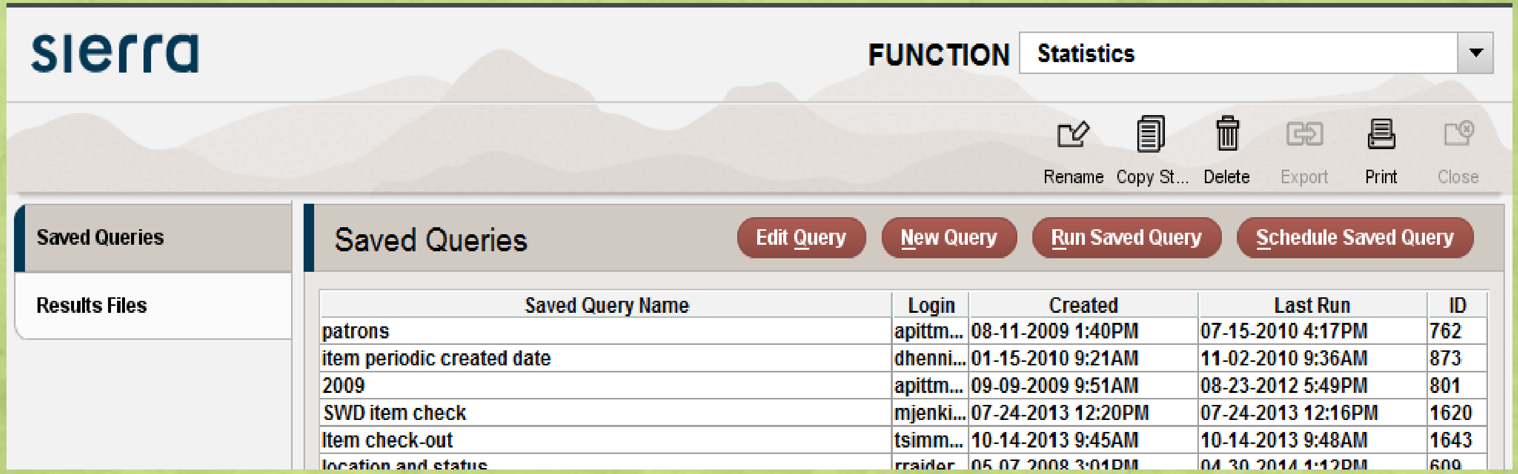


Reporting and Statistics Options



Reporting and Statistics Options





Reporting and Statistics Options

Practical Application

Audit

Scenario: Your library is scheduled for a routine audit; you may be asked to assist with reporting.

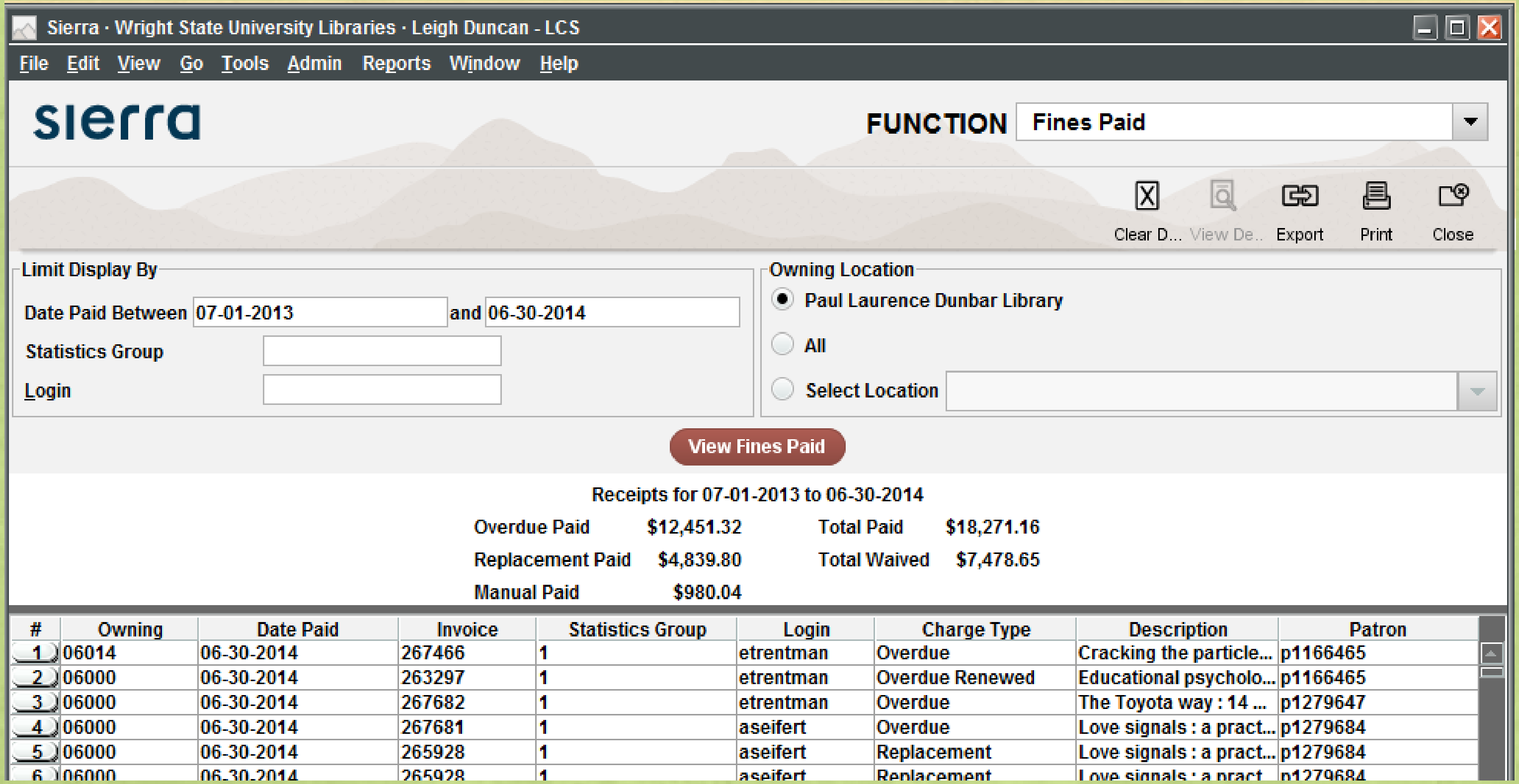
What is the amount of fines paid to the library in fiscal year 2013/2014?

What is the amount of fines assessed in fiscal year 2013/2014?

Audit

Question 1: What is the amount of fines paid to the library in fiscal year 2013/2014?

Quick Response: Fines Paid report from 7/1/2013 to 6/30/2014 for materials from your library



Audit

Question 1: Further Considerations

- Include Fines Paid on materials from other libraries?
- Include fines that were waived?
- Be prepared to translate Inno-speak to the auditors

Under what circumstances are charges “waived”?

Why are manual charges created?

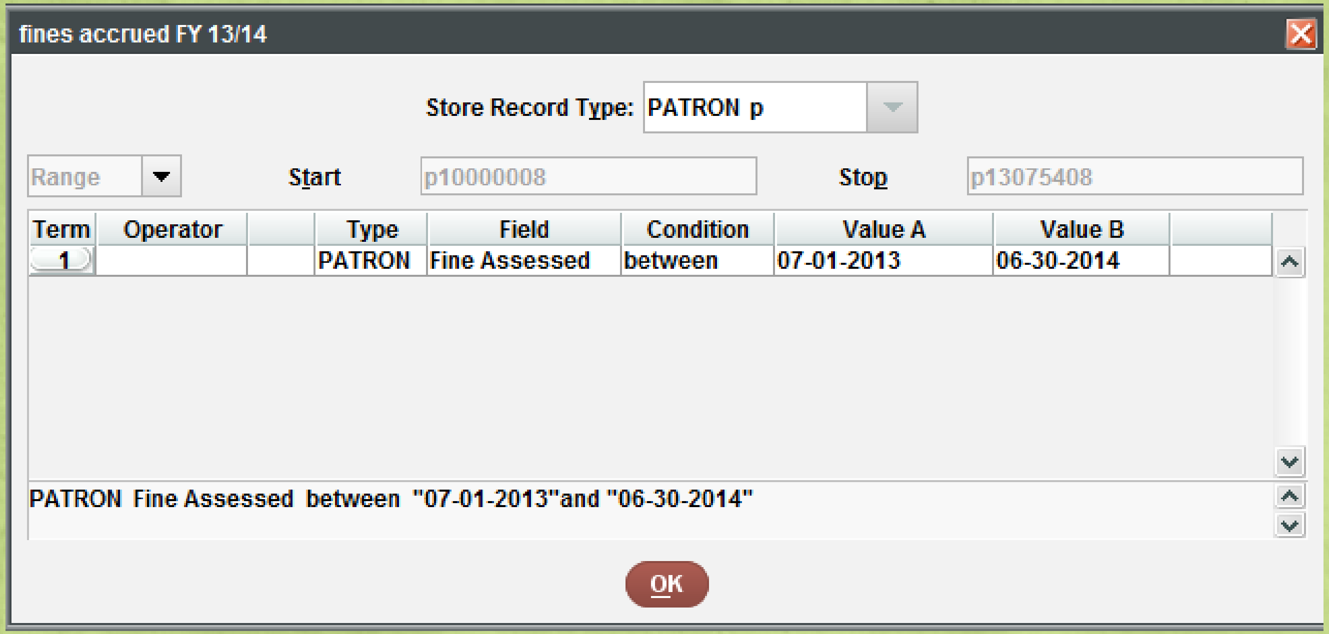
Why is this charge included if there was “no payment”?

Last Paym	Login	Creation Mode	Descriptic	Amount P	Paymen
$0.00	dmiller	Automatic	The exper	$5.50	Full Payment
$0.00	dmiller	Automatic	André Bre	$5.50	Full Payment
$0.00	cduffy	Automatic	Cell phon	$0.00	Waive
$0.00	dmiller	Automatic	Race [vide	$0.00	Waive
$0.00	cduffy	Automatic	Unseen M	$3.50	Full Payment
$0.00	etrentman	Automatic	Women o	$1.00	Full Payment
$0.00	etrentman	Manual	The Antisl	$52.51	Full Payment
$0.00	etrentman	Automatic	VISITOR C	$0.00	Waive
0	etrentman	Automatic	VISITOR C	$0.00	Waive
	aseifert	Automatic	Rastafari :	$14.00	Full Payment
	seifert	Automatic	Rastafari :	$0.50	Full Payment
		Automatic	Pimpin' ai	$0.00	No Payment
0		Automatic	Channelir	$0.00	No Payment

Audit

Question 2: What is the amount of fines assessed in fiscal year 2013/2014?

Quick Response: Create a List of fines assessed between 7/1/2013 and 6/30/2014



Audit

Question 2: Further Considerations

- Include Fines Assessed on materials from other libraries?
- Include Fines Assessed to patrons from other libraries?
- Become familiar with searching on Special Fields in Create Lists

Fine Assessed does not include fines already paid . . .

Fines Fields

Fines Fields Source

Create Lists reads the FINE field (the 9 field) in the patron record for fine information. It does not retrieve information from the Fines Paid database. Consequently, Create Lists can search only for information about outstanding fines.

Field Name	Description
Fine Patron	Patron to whom the fine applies.
Fine Assessed	The date the fine was assessed. Note that if the fine is a reinstated fine, this field reflects the date the fine was reinstated and not the original date the fine was assessed.
Fine Invoice Num	The fine's invoice number. For fine adjustment entries (charge type = 4), this column contains the invoice number of the original fine.
Fine Item Charge	**If the fine type is:** / **This field contains:** overdue / The fine amount. replacement bill / The portion of the fine that is the charge for the item

Reinstated fines reflect the date the fine was reinstated

Relocation

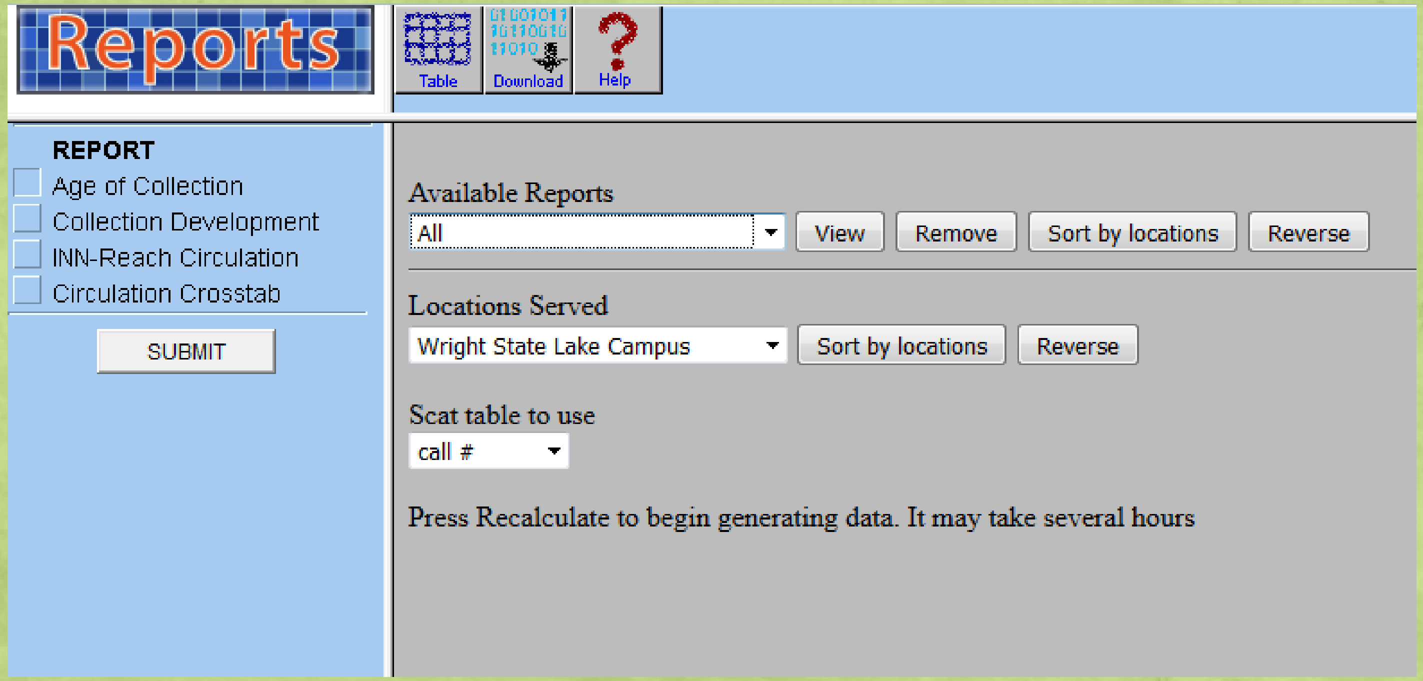
- Scenario: One of your libraries is moving to a much smaller location; you may be asked to help assess the collection.

Our books won't fit!
How do we decide
what to get rid of?

Relocation

Question 1: How do we strategically shrink a library collection?

Quick Response: Use Web Management Reports to create an Age of Collection Report and a Collection Development Report



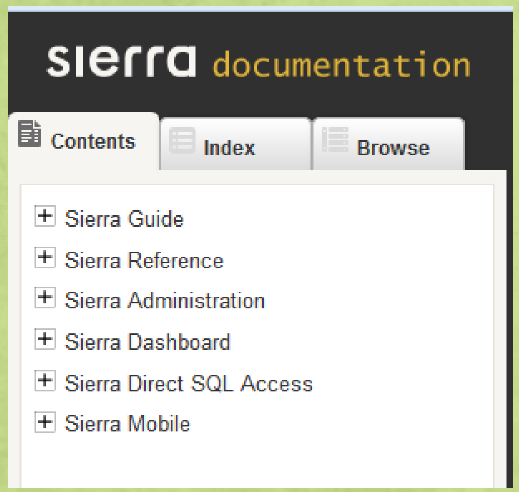
Age of Collection: Count of items by publication date, grouped by call # range

Collection Development: Cataloging and circulation activity over your selected time period, grouped by call # range

Relocation

Further Considerations

- Know your data: Create lists based on rough criteria from the Web Management Reports; view Statistics on those lists to see YTDCIRC and LYCIRC data
- Consider statewide holdings – if a member library, contact your consortia
- Know your collection: Consider how do electronic resource holdings contribute to the collection when evaluating subject coverage
- Consider consulting with particular faculty



Accreditation

- Scenario: One of your colleges or academic programs is pursuing accreditation; you may be asked to supply reports to assist them.

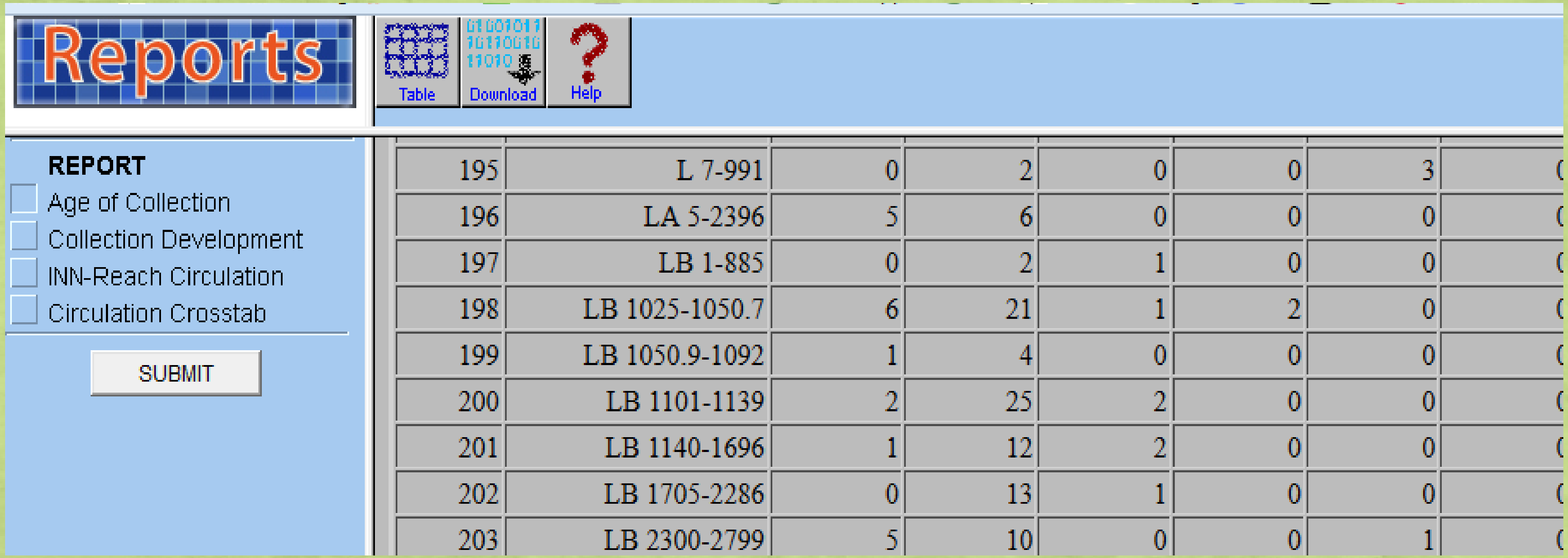
How many Education books do we have in the library?

How often do they get used?

Accreditation

Question 1: How many Education books do we have?

Quick Response: Use Web Management Reports to create an Age of Collection Report. *Hint:* This report can be copied and pasted directly into Excel (or you can download a .txt file and import it).



195	L 7-991	0	2	0	0	3
196	LA 5-2396	5	6	0	0	0
197	LB 1-885	0	2	1	0	0
198	LB 1025-1050.7	6	21	1	2	0
199	LB 1050.9-1092	1	4	0	0	0
200	LB 1101-1139	2	25	2	0	0
201	LB 1140-1696	1	12	2	0	0
202	LB 1705-2286	0	13	1	0	0
203	LB 2300-2799	5	10	0	0	1

Accreditation

Further Considerations

- Consult with your College of Education librarian
- Create a subject-specific SCAT table

Your SCAT Table

SCAT FILE MAINTENANCE (call #)

	STARTING #	ENDING #	CATEGORY	DESCRIPTION
193 >	KG 0001	KWX 0014	193	KG 1-KWX 14
194 >	KZ 0002	KZD 6715.999	194	KZ 2-KZD 6715
195 >	L 0007	L 0991.9999	195	L 7-991
196 >	LA 0005	LA 2396.999	196	LA 5-2396
197 >	LB 0001	LB 0885.9999	197	LB 1-885
198 >	LB 1025	LB 1050.799	198	LB 1025-1050.7
199 >	LB 1050.9	LB 1092.999	199	LB 1050.9-1092
200 >	LB 1101	LB 1139.999	200	LB 1101-1139
201 >	LB 1140	LB 1696.999	201	LB 1140-1696
202 >	LB 1705	LB 2286.999	202	LB 1705-2286
203 >	LB 2300	LB 2799.999	203	LB 2300-2799
204 >	LB 2800	LB 3095.999	204	LB 2801-3095
205 >	LB 3201	LB 3640.999	205	LB 3201-3640
206 >	LC 0001	LC 0050	206	LC 1-50

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LB5-3640	Theory and practice of education
LB5-45	General
LB51-885	Systems of individual educators and writers
LB1025-1050.75	Teaching (Principles and practice)
LB1049.9-1050.75	Reading (General)
LB1050.9-1091	Educational psychology
LB1101-1139	Child study
LB1139.2-1139.5	Early childhood education
LB1140-1140.5	Preschool education. Nursery schools
LB1141-1489	Kindergarten
LB1501-1547	Primary education
LB1555-1602	Elementary or public school education
LB1603-1696.6	Secondary education. High schools
LB1705-2286	Education and training of teachers and administra
LB1771-1773	Certification of teachers
LB1775-1785	Professional aspects of teaching and school ac
	Vocational guidance
LB1805-2151	State teachers colleges
LB1811-1987	United States
LB1991-2151	Other regions or countries
LB2165-2278	Teacher training in universities and colleges
LB2300-2430	Higher education
LB2326.4-2330	Institutions of higher education
LB2331.7-2335.8	Teaching personnel
LB2335.86-2335.885	Trade unions
LB2335.95-2337	Endowments, trusts, etc.
LB2337.2-2340.8	Student financial aid
LB2341-2341.95	Supervision and administration. Business mar
LB2351-2359	Admissions and entrance requirements
LB2361-2365	Curriculum
LB2366-2367.75	College examinations
LB2371-2372	Graduate education
LB2381-2391	Academic degrees
LB2799-2799.3	Educational consultants and consulting
LB2801-3095	School administration and organization
LB2831.6-2831.99	Administrative personnel
LB2832-2844.1	Teaching personnel

Accreditation

Question 1: How often do the library's Education books get used?

Quick Response: Use Web Management Reports to create a Collection Development Report.

Table Download Help

Annual Collection Development Report

01-01-05 -> 01-31-15

Scat table: call # Location(s): Wright State Lake Campus Created on 09-12-15

Category	Description	Size of Collection: Items	Items Added	Bibs Cataloged	# of Orders Received	Orders with Payment	$ Amount of Orders	# of Check Outs	Average $ per Order	Average Circulations	Avg $ per Bib Cataloged	Average $ per Circulation
-1	No call #	1225	565	6	22	33	$487,400.11	0	$14,769.70	0.00	$81,233.35	$0.00
0	Not in table	1376	237	18	22	31	$22,992.52	63	$741.69	0.27	$1,277.36	$364.96
1	AC 1-999	55	0	0	0	0	$0.00	4	$0.00	0.00	$0.00	$0.00
2	AE 1-90	47	0	0	0	0	$0.00	3	$0.00	0.00	$0.00	$0.00
3	AG 2-600	2	0	0	0	0	$0.00	0	$0.00	0.00	$0.00	$0.00
4	AI 1-21	6	1	0	0	0	$0.00	0	$0.00	0.00	$0.00	$0.00
7	AP 1-271	77	47	0	7	8	$2,504.12	0	$313.01	0.00	$0.00	$0.00
9	AY	33	30	1	4	5	$2,935.53	3	$587.10	0.10	$2,935.53	$978.51
11	B 1-105	15	3	2	0	0	$0.00	9	$0.00	3.00	$0.00	$0.00
12	B 108-785	9	9	3	0	0	$0.00	7	$0.00	0.78	$0.00	$0.00
13	B 790-5802	6	5	3	0	0	$0.00	21	$0.00	4.20	$0.00	$0.00
15	BD 10-701	3	3	1	0	0	$0.00	10	$0.00	3.33	$0.00	$0.00

Accreditation

Further Considerations

- Work closely with the college to determine what information they need
    - More granular circulation statistics are available through a Statistics fixed-field report

Range	Description	Record C...	TOT CHKOUT	TOT RENEW	YTDCIRC	LYRCIRC
LB1025-LB1050.7	LB 1025-1050.7	3872	15308	10327	95	744
LB1050.9-LB1092.	LB 1050.9-1092	788	4479	2396	17	170
LB1101-LB1139.9	LB 1101-1139	779	3370	1975	22	100
LB1140-LB1696.9	LB 1140-1696	3186	13962	7967	96	529
LB1705-LB2286.9	LB 1705-2286	1040	3703	2660	9	127
LB2300-LB2799.9	LB 2300-2799	2555	11404	8791	73	562
LB2800-LB3095.9	LB 2801-3095	3439	16179	7526	30	372
LB3201-LB3640.9	LB 3201-3640	257	1004	396	4	27
LC1-LC59	LC 1-59	89	598	155	1	19
LC65-LC245.9999	LC 65-245	1681	7493	4382	28	240
LC251-LC951.9999	LC 251-951	297	894	317	1	13
LC980-LC1099.59	LC 980-1099.5	655	2639	1548	15	78
LC1200-LC5160.3	LC 1200-5160.3	2597	13621	6609	43	298
LC5161-LC6691.9	LC 5161-6691	463	1779	1120	7	46
LD13-LD7501.999	LD 13-7501	6452	10083	3984	2	96
LE3-LE78	LE 3-78	8	11	3	0	0
LF14-LF5627.999	LF 14-5627	23	73	5	0	0
LG21-LG961.9999	LG 21-961	8	5	0	0	0
LH1-LH9	LH 1-9	65	60	3	0	4

Student Success

- Scenario: The bottom line at universities is student success. You may be called upon to prove how the library contributes to that success.

Can we determine how library use correlates to student success rates?

Student Success

Tip: Utilize the powerful capabilities of your Research, Analytics and Reporting (RAR) Department; determine what partnership opportunities there are for the library

Current Project at Sinclair Community College

- Goal: Show the number of unique library users and get data on the library as a contributing factor to student success
- Tools: Innovative's Scheduler, Create Lists, FTP
- Considerations: Privacy issues, availability (or lack of!) for inn-reach transactions, de-duplication, etc.

Student Success

Hourly Scheduler jobs are run and FTP'd from 8am-9pm, 7 days per week

Job 1 (local)

Item OUTDATE is not blank

Job 2 (inn-reach)

Virtual Patron Record exists

RAR determines reports and analyzes library usage by unique users; comparing existing data on those same users

Fines to Bursar

- Scenario: Each quarter you transfer fines to the bursar. Your accounting staff needs particular information about those fines for their records.

Fines to Bursar

Question 1: After we transfer patron fines to the bursar, can I get information about those fines?

Quick Response: No. (Just kidding!) Create a report using the Fines Paid file.

1	Fines Paid								
2									
3	Date Assessed	Patron Record	Patron Unique ID	Invoice	Charge Amt.	Processing Fee	Billing Fee	Charge Type	Ow
4	6/10/2015	1300294	U00734082	274967	$25.00	$0.00	$0.00	Manual Charge	
5	6/15/2015	1304797	U00803856	275042	$12.50	$0.00	$0.00	Overdue	ou4
6	4/23/2015	1303951	U00800362	274118	$11.00	$0.00	$0.00	Overdue	da3
7	6/23/2015	1303044	U00400938	275179	$9.00	$0.00	$0.00	Overdue	ou4
8	6/23/2015	1303044	U00400938	275180	$9.00	$0.00	$0.00	Overdue	de4
9	5/4/2015	1302911	U00770771	274364	$7.50	$0.00	$0.00	Overdue	os4
10	7/30/2015	1302883	U00786346	275718	$8.50	$0.00	$0.00	Overdue	ct3
11	7/28/2015	1302883	U00786346	275690	$7.50	$0.00	$0.00	Overdue	mu
12	4/18/2015	1302778	U00773524	274017	$5.50	$0.00	$0.00	Overdue	
13	6/11/2015	1302771	U00774498	274977	$17.00	$0.00	$0.00	Overdue	
14	5/21/2015	1302771	U00774498	274646	$6.50	$0.00	$0.00	Overdue	ym

Fines to Bursar

Further Considerations

- Does your staff need information beyond that available in the Fines Paid File? Is the Fines Paid File currently available in Sierra?
- Try an SQL query of the Sierra database

fines_paid

Each row of fines_paid describes a fine that has been removed from a patron's record.

NOTE: This view contains data from the Globally Purge Charges feature.

Column	Data Type	Not NULL?	Comment
id	bigint	false	System-generated sequential ID.
fine_assessed_date_gmt	timestamptz	false	The date the fine was assessed. Note that if the fine is a reinstated fine, this column reflects the date the fine was reinstated and not the original date the fine was assessed.
patron_record_metadata_id	bigint	false	Foreign key to record_metadata (for the patron record).
item_charge_amt	numeric	false	**If the fine type is:** / **This column contains:** overdue / The fine amount.

Fines to Bursar

Example Query and Results:

```
SELECT
checked_out_date_gmt AS CheckedOut,due_date_gmt AS DueDate,fine_assessed_date_gmt AS
DateAssessed,last_name||','||first_name||' '||middle_name AS PatronName,barcode,record_num AS
recordNumber,invoice_num AS Invoice,item_charge_amt AS ChargeAmount,processing_fee_amt
AS ProcessingFee,billing_fee_amt AS BillingFee,last_paid_amt AS LastPmt,CAST(paid_date_gmt
AS DATE) as createdate,charge_type_code AS ChargeType, charge_location_code AS
ChargeLoc,tty_num AS StatsGrp,iii_user_name AS Initials,description

FROM sierra_view.fines_paid,sierra_view.patron_record_fullname,sierra_view.patron_view
WHERE
sierra_view.fines_paid.patron_record_metadata_id=sierra_view.patron_record_fullname.patron_re
cord_id
AND sierra_view.fines_paid.patron_record_metadata_id=sierra_view.patron_view.id
AND paid_date_gmt >= '2015-04-24'::TIMESTAMP
LIMIT 700;
```

New fields included:

- ✓ Checkout Date
- ✓ Due Date
- ✓ Patron Barcode

1	Date Checked Out	Due Date	Date Assessed	Barcode	Record No.	Invoice	Charge Amt	Processing Fee	Billing Fee	Last Pmt	Created Date	Charge Type	Location	Stats Grp	Staff	Title
5	5/15/2015 16:49	6/5/2015 4:00	6/23/2015 20:53	6280770004677270	1303044	275179	$9.00	$0.00	$0.00	$0.00	8/13/2015	2	ou4ug	1	lduncan	Roadside geology of Penn
6	5/15/2015 16:49	6/5/2015 4:00	6/23/2015 20:53	6280770004677270	1303044	275180	$9.00	$0.00	$0.00	$0.00	8/13/2015	2	de4ug	1	lduncan	Roadside geology of New
7	10/9/2014 15:14	4/19/2015 4:00	5/4/2015 10:26	6280770003424260	1302911	274364	$7.50	$0.00	$0.00	$0.00	8/13/2015	2	os4ug	1	lduncan	Maps and cross sections o
8	5/14/2015 13:08	7/13/2015 4:00	7/30/2015 12:58	6280770001534970	1302883	275718	$8.50	$0.00	$0.00	$0.00	8/13/2015	2	ct3tg	1	lduncan	Human diseases : a systen
9	5/14/2015 13:08	7/13/2015 4:00	7/28/2015 10:58	6280770001534970	1302883	275690	$7.50	$0.00	$0.00	$0.00	8/13/2015	2	mu3ug	1	lduncan	African American psychol
10	3/10/2015 9:48	4/7/2015 4:00	4/18/2015 14:00	6280770001499300	1302778	274017	$5.50	$0.00	$0.00	$0.00	8/13/2015	2	6013	1	lduncan	Burma Chronicles
11	8/22/2014 14:20	5/5/2015 4:00	6/11/2015 18:52	6280770001243710	1302771	274977	$17.00	$0.00	$0.00	$0.00	8/13/2015	2	6000	1	lduncan	Handbook of statistical an

Avoiding Disaster

1. Always view example records before accepting the report
   - You may be overlooking a field that is vital to the project or decisions being made
   - Be sure you are gathering what you intended
2. Know your data
   - Patron data – talk to your circulation staff to learn about “exceptions” and “special cases”
   - Bibliographic data – talk to your cataloging department about “special processes” or “data limitations”
3. Create Lists in multiple ways
   - *Expiration date* = versus *Expiration date* >
4. Make the reports/data usable
   - Export to Excel and clean-up

Help

User Manuals

IUG Clearinghouse

IUG Conference Programs

Innovative Documentation

Innovative Online Classes

Contact

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