

How to Use Web Management Reports



Ben Kline

Senior Library Associate Specialist

Circulation & Multimedia Services

University of Cincinnati Libraries

klinedb@ucmail.uc.edu

How to Use Web Management Reports

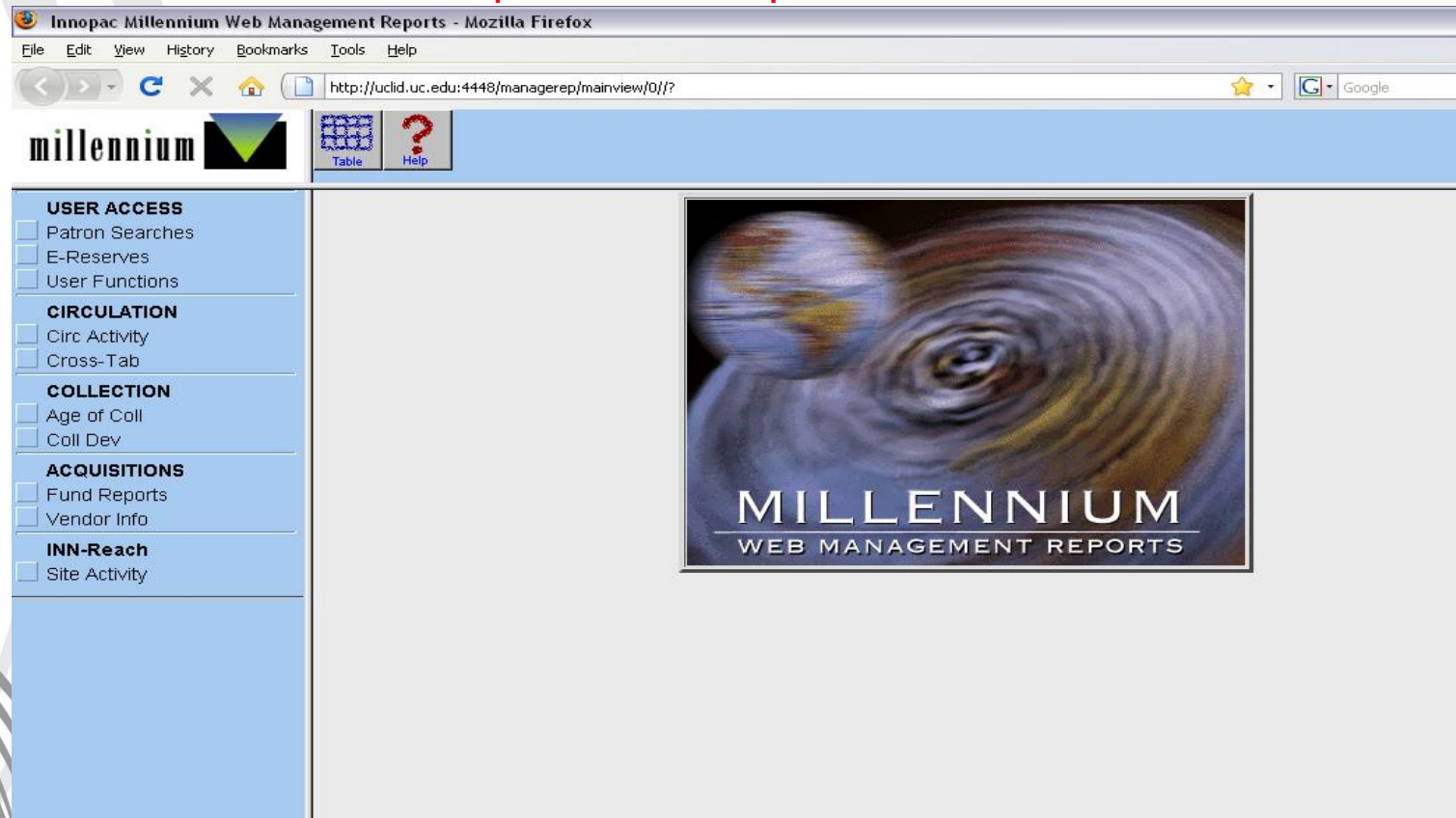


Web Management Reports is the online statistical module of III's Millennium software. Users can create and download collection and circulation reports.

There are 2 versions of Web Management Reports

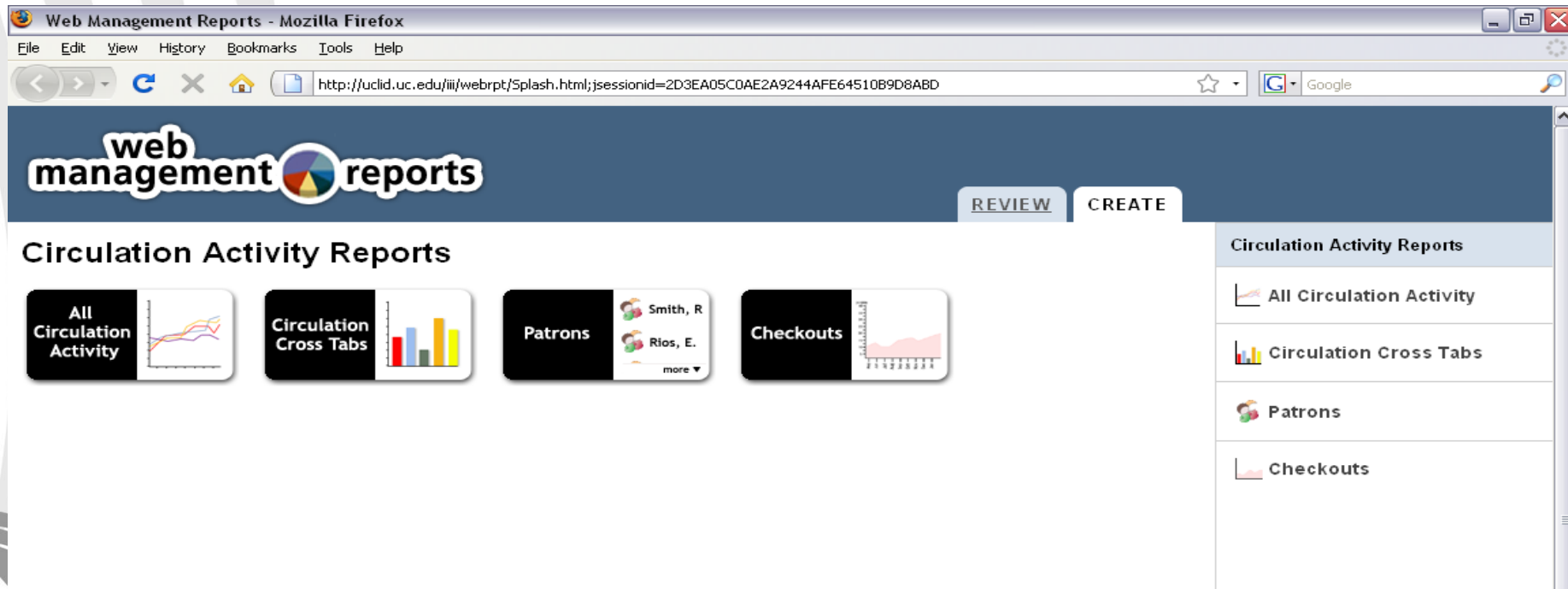
How to Use Web Management Reports

The comprehensive version generates all reports creates the reports online for download or cut and paste into a spreadsheet.



How to Use Web Management Reports

The newer version generates a limited number of reports directly into formatted Excel files.



The screenshot shows a web browser window titled "Web Management Reports - Mozilla Firefox". The address bar displays the URL: <http://uclid.uc.edu/iii/webprt/Splash.html;jsessionid=2D3EA05C0AE2A9244AFE64510B9D8ABD>. The page features a dark blue header with the "web management reports" logo and two tabs: "REVIEW" and "CREATE". Below the header, the main content area is titled "Circulation Activity Reports" and contains four report cards: "All Circulation Activity" (line graph), "Circulation Cross Tabs" (bar chart), "Patrons" (listing Smith, R. and Rios, E. with a "more" link), and "Checkouts" (area chart). A right-hand sidebar lists the same four report categories under the heading "Circulation Activity Reports".

How to Use Web Management Reports

To begin generating reports in WMR:

- Open web browser.
- Determine the local WMR's URL. Most relate to the local catalog somehow.
- Go to the local catalog url and add **manage** after the final slash. For example, at UCL, the web management reports are found at <http://uclid.uc.edu/manage>.
At Ohio State it is <http://library.ohio-state.edu/manage>, which becomes <http://felix.us.ohio-state.edu:4448/managerep/mainview/0//?>
- The URL for the Excel version is a little different. For example: <http://uclid.uc.edu/iii/webbrpt/app> or whichever URL a location uses.

How to Use Web Management Reports

Users have to have authorization locally, making knowledge of the URL of no danger.

WMR User Login - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://ucldid.uc.edu/ii/webprpt/UserLogin.html

web management reports

REVIEW CREATE

Enter Initials and Password

Initials:

Password:

OK Cancel

Circulation Activity Reports

- All Circulation Activity
- Circulation Cross Tabs
- Patrons
- Checkouts

How to Use Web Management Reports

Now, step-by-step instructions for a few sample reports.
Beginning with monthly circulation statistics.

Web Management Reports - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://uclid.uc.edu/iii/webprt/app

Google

web management reports

REVIEW CREATE

Circulation Activity Reports

All Circulation Activity

Circulation Cross Tabs

Patrons

Checkouts

Step 1: Generate the basic reports relating to Circulation and Terminal Activity. Click on Checkouts.

opac Millennium Web Management Reports - Mozilla Firefox

EditViewHistoryBookmarksToolsHelp

→↺↻🏠🖨

http://uclid.uc.edu:4448/managerep/mainview/0/?

Google

millennium

Table

Help

USER ACCESS

atron Searches

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User Functions

CIRCULATION

circ Activity

cross-Tab

COLLECTION

age of Coll

coll Dev

ACQUISITIONS

und Reports

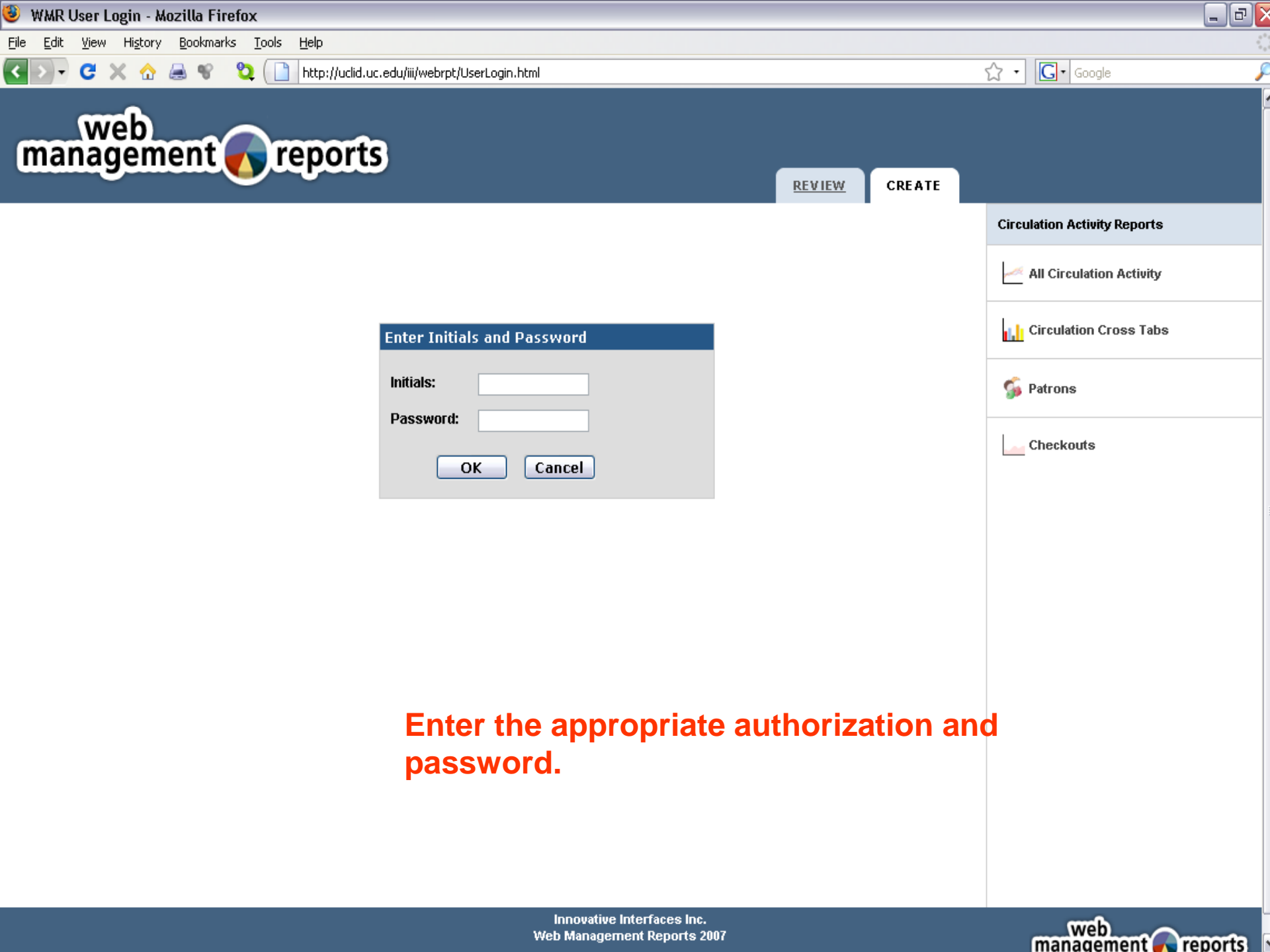
endor Info

NN-Reach

ite Activity



Step 1: Generate the basic reports relating to Circulation and Terminal Activity.

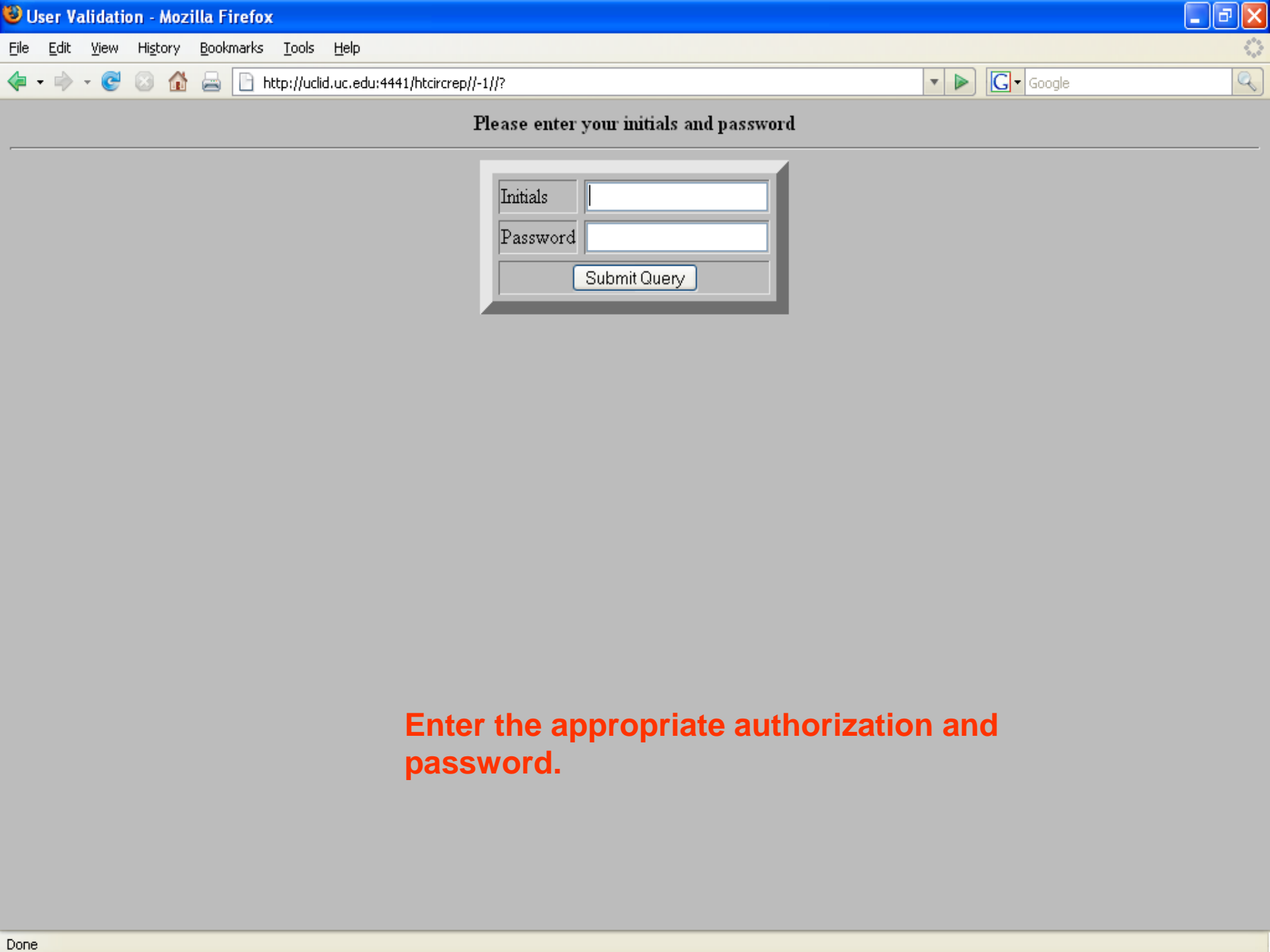


Enter Initials and Password

Initials:

Password:

Enter the appropriate authorization and password.



Enter the appropriate authorization and password.

Web Management Reports - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://ucldid.uc.edu/iii/webprt/app

Google

web management reports

REVIEW CREATE

Circulation Activity Reports

All Circulation Activity

Circulation Cross Tabs

Patrons
Smith, R.
Rios, E.
more ▾

Checkouts

Circulation Activity Reports

All Circulation Activity

Circulation Cross Tabs

Patrons

Checkouts

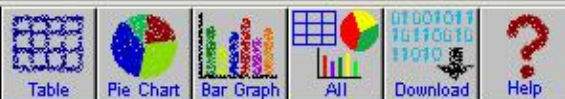
Step 2: The first report is for Circulation stats of the location collection. Select Checkout. Set date and info parameters.

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Web Management Reports 2007

web management reports

http://ucldid.uc.edu/iii/webprt/secure/AllActivity.html

UNIVERSITY OF CINCINNATI LIBRARIES www.libraries.uc.edu

**CIRC STATS**

- ☐ All Activity
- ☐ Booking
- ☐ Checkout
- ☐ Filled
- ☐ Renewal
- ☐ Inhouse
- ☐ Hourly
- ☐ Title
- ☐ Patrons
- ☐ Requests

DATES

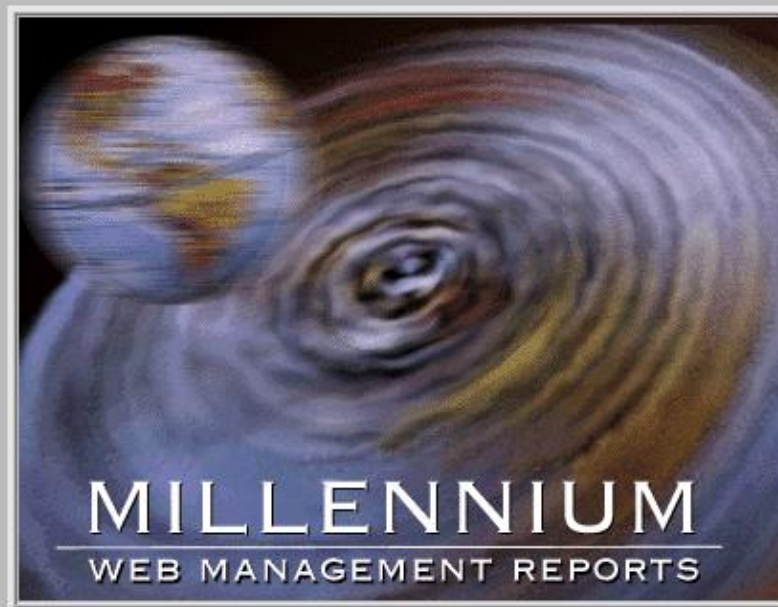
- ☐ Yesterday
- ☐ 2 days ago
- ☐ 3 days ago
- ☐ MTD
- ☐ YTD
- ☐ User spec
- ☐ Last mo
- ☐ Other report

LOCATIONS

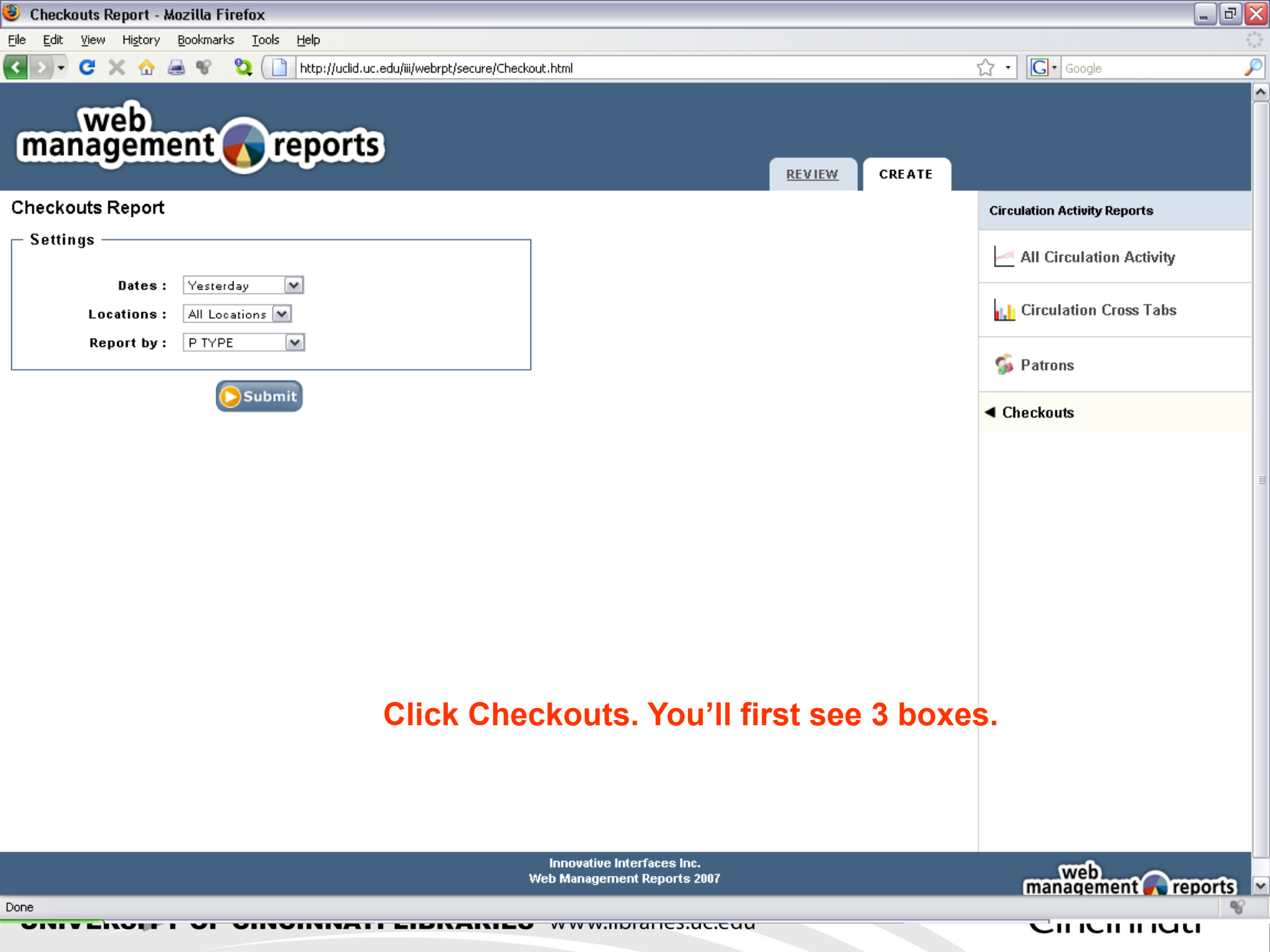
- ☐ System
- ☐ Separate
- ☐ One only
- ☐ Special

TYPE

- ☐ P TYPE



Step 2: The first report is for Circulation stats of the location collection. Select Checkout. Set date and info parameters.



Click Checkouts. You'll first see 3 boxes.

millennium



Table



Pie Chart



Bar Graph



All



Download



Help

CIRC STATS

- ☐ All Activity
- ☐ Booking
- ☐ Checkout
- ☐ Filled
- ☐ Renewal
- ☐ Inhouse
- ☐ Hourly
- ☐ Title
- ☐ Patrons
- ☐ Requests

DATES

- ☐ Yesterday
- ☐ 2 days ago
- ☐ 3 days ago
- ☐ MTD
- ☐ YTD
- ☐ User spec
- ☐ Last mo
- ☐ Other report

LOCATIONS

- ☐ System
- ☐ Separate
- ☐ One only
- ☐ Special

TYPE

- ☐ P TYPE

Please select a LOCATIONS SERVED list (09-06-07)

ARB

SUBMIT

When choosing only one location, as we do for Langsam in Circulation Services at UC, you have to choose your branch location.

Checkouts Report - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://uclid.uc.edu/iii/webprt/secure/Checkout.html

Google

web management reports

REVIEWCREATE

Checkouts Report

Settings

Dates : Last Month

Locations : One Only

HEALTH SCI

HIST OF MED

LANGSAM

LAW

MATH

Report by : P TYPE

Submit

Circulation Activity Reports

All Circulation Activity

Circulation Cross Tabs

Patrons

Checkouts

When choosing only one location, as we do for Langsam in Circulation Services at UC, you have to choose your branch location.

We run the lists in P Type, I Type and Location for further analysis later on.

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Web Management Reports 2007

web management reports

Done

UNIVERSITY OF CALIFORNIA LIBRARIES www.libraries.ucf.edu

Circulation

millennium



Table



Pie Chart



Bar Graph



All



Download



Help

CIRC STATS

- ☐ All Activity
☐ Booking
☐ Checkout
☐ Filled
☐ Renewal
☐ Inhouse
☐ Hourly
☐ Title
☐ Patrons
☐ Requests

DATES

- ☐ Yesterday
☐ 2 days ago
☐ 3 days ago
☐ MTD
☐ YTD
☐ User spec
☐ Last mo
☐ Other report

LOCATIONS

- ☐ System
☐ Separate
☐ One only
☐ Special

TYPE

- ☐ P TYPE

Recalculate

CIRCULATION (CHECKOUT) STATISTICS**LANGSAM**

P TYPE	Aug 07		Change vs		Actual #	
	PERCENT	QTY	Jul 07	Aug 06	Jul 07	Aug 06
Undergraduate	21.4%	1262	-6.5%	-15.7%	1350	1497
NH Undergrad	0.2%	10	-65.5%	-54.5%	29	22
Grad Student	24.2%	1427	-20.6%	-23.3%	1798	1860
Law Student	0.3%	15	-73.7%	-42.3%	57	26
Faculty	15.2%	895	20.9%	0.0%	740	895
Law Faculty & Affiliates/Staff	0.3%	16	-15.8%	-23.8%	19	21
Faculty Affiliate	0.1%	6	-60.0%	-78.6%	15	28
Staff	7.5%	441	-3.3%	-6.0%	456	469
SWON Patron	2.9%	169	-8.2%	35.2%	184	125
ILL	2.3%	135	-7.5%	-12.9%	146	155
Desk/Studies	0.0%	1	0.0%	0.0%	1	1

The reports generates circulation data for the previous month, as well as comparing it to the same month a year ago and the preceding month. This report can only be run for a preceding month. For example, one cannot generate this data for August in October.

web management reports

REVIEW

CREATE

Checkouts Report

Settings

Dates : Last Month ▼

Locations : One Only ▼

***Please select one location*HEALTH SCI
HIST OF MED
LANGSAM
LAW
MATH

Report by : P TYPE ▼



Opening report.xls

You have chosen to open



report.xls

which is a: Microsoft Office Excel 97-2003 Worksheet
from: http://uclid.uc.edu

What should Firefox do with this file?

☒ Open with: Microsoft Office Excel (default) ▼☐ Save File☐ Do this automatically for files like this from now on.

OK

Cancel

Circulation Activity Reports

All Circulation Activity

Circulation Cross Tabs

Patrons

◀ Checkouts

report [Group] [Rea

Home Insert Page Layout Formulas Data Review View

Paste

Clipboard

Security warning macros have been disabled. Options...

The newer Web Management Reports generates and organizes the data directly into spreadsheets with multiple worksheets that report the data in varying levels of detail and style.

A1		fx = 'Raw Data'!\$A\$1	
	A	B	C
1	CIRCULATION (CHECKOUT) STATISTICS		
2	LANGSAM		
3	Apr 09		
4	P TYPE	PERCENT	QTY
5	Undergraduate	37.0%	3,649
6	Grad Student	22.8%	2,251
7	Faculty	9.7%	956
8	OhioLINK Undergrad.	6.9%	679
9	Staff	5.6%	553
10	OhioLINK Faculty	4.9%	484
11	OhioLINK Graduate	5.7%	562
12	ILL	1.9%	188
13	Conservation	0.2%	17
14	Law Student	0.5%	53
15	SWON Patron	1.4%	136
16	OhioLINK Public Adult	0.6%	64
17	OhioLINK Staff	0.4%	43
18	NH Undergrad	0.5%	53
19	HUC	0.1%	11
20	Faculty Affiliate	0.2%	21
21	General - Area Patron	0.0%	3
22	Law Faculty & Affiliates/Staff	0.6%	62
23	OhioLINK Courtesy/Permit	0.1%	9
24	OhioLINK Affiliated Fac/Staff	0.1%	6

report [Read-Only] [Compatibility Mode] - Microsoft Ex

Home Insert Page Layout Formulas Data Review View Add-Ins

Condition Formatting

Security warning macros have been disabled. Options...

chart_title		CIRCULATION (CHECKOUT) STATISTICS					
	A	B	C	D	E	F	G
1	CIRCULATION (CHECKOUT) STATISTICS						
2	LANGSAM						
3		Apr 09	Change vs	Actual #			
4	P TYPE	PERCENT	QTY	Mar 09	Apr 08	Mar 09	Apr 08
5	Total	100.0%	9853	-3.0%	-2.2%	10162	10073
6	Undergraduate	37.0%	3649	-2.0%	12.4%	3722	3247
7	Grad Student	22.8%	2251	-1.3%	-10.2%	2280	2508
8	Faculty	9.7%	956	-17.7%	-27.8%	1162	1324
9	OhioLINK Undergrad.	6.9%	679	20.8%	3.0%	562	659
10	Staff	5.6%	553	2.8%	2.8%	538	538
11	OhioLINK Faculty	4.9%	484	-8.2%	8.5%	527	446
12	OhioLINK Graduate	5.7%	562	-3.9%	30.7%	585	430
13	ILL	1.9%	188	-9.2%	-6.0%	207	200
14	Conservation	0.2%	17	-80.0%	-90.7%	85	183
15	Law Student	0.5%	53	-24.3%	-52.7%	70	112
16	SWON Patron	1.4%	136	-5.6%	22.5%	144	111
17	OhioLINK Public Adult	0.6%	64	0.0%	-1.5%	64	65
18	OhioLINK Staff	0.4%	43	-29.5%	-20.4%	61	54
19	NH Undergrad	0.5%	53	-11.7%	1.9%	60	52
20	HUC	0.1%	11	-21.4%	-64.5%	14	31
21	Faculty Affiliate	0.2%	21	50.0%	-22.2%	14	27
22	General - Area Patron	0.0%	3	200.0%	-87.0%	1	23
23	Law Faculty & Affiliates/Staff	0.6%	62	121.4%	287.5%	28	16
24	OhioLINK Courtesy/Permit	0.1%	9	-10.0%	-40.0%	10	15
25	OhioLINK Affiliated Fac/Staff	0.1%	6	200.0%	-25.0%	2	8
26	OhioLINK Public Teen	0.0%	3	0.0%	-57.1%	3	7
27	Department	0.2%	19	1800.0%	375.0%	1	4
28	Desk/Studies	0.0%	1	0.0%	-66.7%	1	3
29	Lib. Friends (basic)	0.1%	10	0.0%	233.3%	0	3

How to Use Web Management Reports

Annual Data

There are several ways to examine annual data. The most encompassing is the All Activity report by Item Location.

It provides an enormous amount of upfront raw data, but once sorted in Excel, is a very useful report.

How to Use Web Management Reports



CIRC STATS

- ☐ All Activity
- ☐ Booking
- ☐ Checkout
- ☐ Filled
- ☐ Renewal
- ☐ Inhouse
- ☐ Hourly
- ☐ Title
- ☐ Patrons
- ☐ Requests

DATES

- ☐ Yesterday
- ☐ 2 days ago
- ☐ 3 days ago
- ☐ MTD
- ☐ YTD
- ☐ User spec
- ☐ Last mo

SORT BY

- ☐ Terminal
- ☐ Item Location
- ☐ Hour
- ☐ Limit

MAINTENANCE

- ☐ Remove Existing Tables

SUBMIT

Choose
CIRC STATS
All Activity,
DATES User
spec and
SORT BY
Item
Location.

Then select
dates for the
reporting
period.

Choose a STARTING and ENDING month

- | | | | | | |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|----------------------------------|
| <input type="checkbox"/> Oct 06 | <input type="checkbox"/> Apr 07 | <input type="checkbox"/> Oct 07 | <input type="checkbox"/> Apr 08 | <input type="checkbox"/> Oct 08 | <input type="checkbox"/> Apr 09 |
| <input type="checkbox"/> Nov 06 | <input type="checkbox"/> May 07 | <input type="checkbox"/> Nov 07 | <input type="checkbox"/> May 08 | <input type="checkbox"/> Nov 08 | <input type="checkbox"/> May 09 |
| <input type="checkbox"/> Dec 06 | <input type="checkbox"/> Jun 07 | <input type="checkbox"/> Dec 07 | <input type="checkbox"/> Jun 08 | <input type="checkbox"/> Dec 08 | <input type="checkbox"/> Jun 09 |
| <input type="checkbox"/> Jan 07 | <input type="checkbox"/> Jul 07 | <input type="checkbox"/> Jan 08 | <input type="checkbox"/> Jul 08 | <input type="checkbox"/> Jan 09 | <input type="checkbox"/> Jul 09 |
| <input type="checkbox"/> Feb 07 | <input type="checkbox"/> Aug 07 | <input type="checkbox"/> Feb 08 | <input type="checkbox"/> Aug 08 | <input type="checkbox"/> Feb 09 | <input type="checkbox"/> Aug 09 |
| <input type="checkbox"/> Mar 07 | <input type="checkbox"/> Sep 07 | <input type="checkbox"/> Mar 08 | <input type="checkbox"/> Sep 08 | <input type="checkbox"/> Mar 09 | <input type="checkbox"/> Current |

Submit Query

Recalculate

CIRCULATION ACTIVITY by ITEM LOCATION (Jul 08-Jun 09)

LOC	CHKOUTS	CHKINS	RENEWALS	ITEMS CIRC	HOLDS	HI/RECLL	TOTAL #	PERCENT
ak2ug	1766	1625	2480	4246	0	0	5871	0.7%
an3bg	54	52	68	122	0	0	174	0.0%
as2ug	256	254	390	646	0	0	900	0.1%
at3ug	179	178	291	470	0	0	648	0.1%
be4tg	71	66	83	154	0	0	220	0.0%
bflug	100	94	125	225	0	0	319	0.0%
bg1ug	2480	2330	3504	5984	0	0	8314	1.0%
brwc	0	1	0	0	0	0	1	0.0%
buc1	3	1	0	3	0	0	4	0.0%
bucm	2	0	0	2	0	0	2	0.0%
buda	0	0	0	0	1	0	1	0.0%
buen	2	2	0	2	0	0	4	0.0%
bugp	2	1	0	2	0	0	3	0.0%
bula	76	74	43	119	0	0	193	0.0%
bw3bg	146	144	176	322	0	0	466	0.1%
ca2ug	741	833	1121	1862	0	0	2695	0.3%
caves	30	43	11	41	5	1	90	0.0%
cavsc	513	523	110	623	89	4	1239	0.1%
cb3bg	144	146	261	405	0	0	551	0.1%
cc2mh	33	35	45	78	0	0	113	0.0%
cc2p1	1122	1108	1306	2428	0	0	3536	0.4%

How to Use Web Management Reports

The report lists every item location that circulated in the local system.

Once cut and paste into Excel, the non-local locations can be removed and what remains is a very detailed total local circ.

These reports are also available in the Excel version.

CIRCULATION ACTIVITY by ITEM LOCATION (Jul 08-Jun 09)

LOC	CHKOUTS	CHKINS	RENEWALS	ITEMS CIRC	HOLDS	HI/RECLL	TOTAL #	PERCENT
ulabc	389	381	1	390	0	0	771	0.10%
ulabk	6299	6247	1582	7881	0	0	14128	1.70%
ulac	136	142	26	162	4	0	308	0.00%
ulaes	0	2	1	1	5	0	8	0.00%

How to Use Web Management Reports

Hourly Data

If an institution wants to examine the hour data at a particular service desk...the reports can be generated down to an hourly basis for every day of a month!

Circulation Statistics - All Activity - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://ucldid.uc.edu:4441/htccircrep/-1/?

Google

millennium

Table

Pie Chart

Bar Graph

All

Download

Help

CIRC STATS

☐ All Activity

☐ Booking

☐ Checkout

☐ Filled

☐ Renewal

☐ Inhouse

☐ Hourly

☐ Title

☐ Patrons

☐ Requests

TOTAL

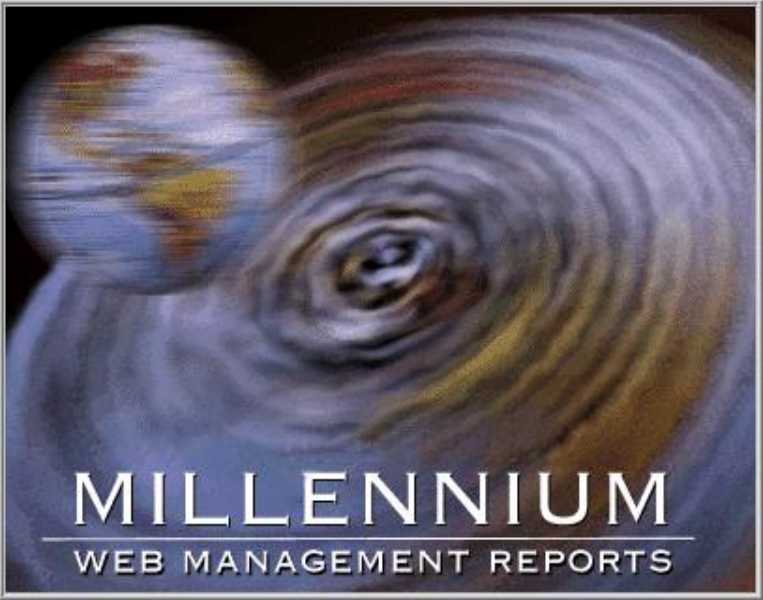
☐ Items

☐ Patrons

MAINTENANCE

☐ Remove Existing Tables

SUBMIT



Step 3: Generate reports on hourly item terminal activity.

Applet com.iii.applet.menu started

Circulation Statistics - Hourly Checkouts - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://ucldid.uc.edu:4441/htcircrep/hourly//h|I|ilename=||/?

Google

millennium

Table

Download

Help

CIRC STATS

☐ All Activity

☐ Booking

☐ Checkout

☐ Filled

☐ Renewal

☐ Inhouse

☐ Hourly

☐ Title

☐ Patrons

☐ Requests

TOTAL

☐ Items

☐ Patrons

MAINTENANCE

☐ Remove Existing Tables

SUBMIT

Recalculate

ITEMS CHECKED OUT (GROUP 2 Oct 04)

DAY	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	oth	TOTAL
12	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
20	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
TOTAL	0	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	2

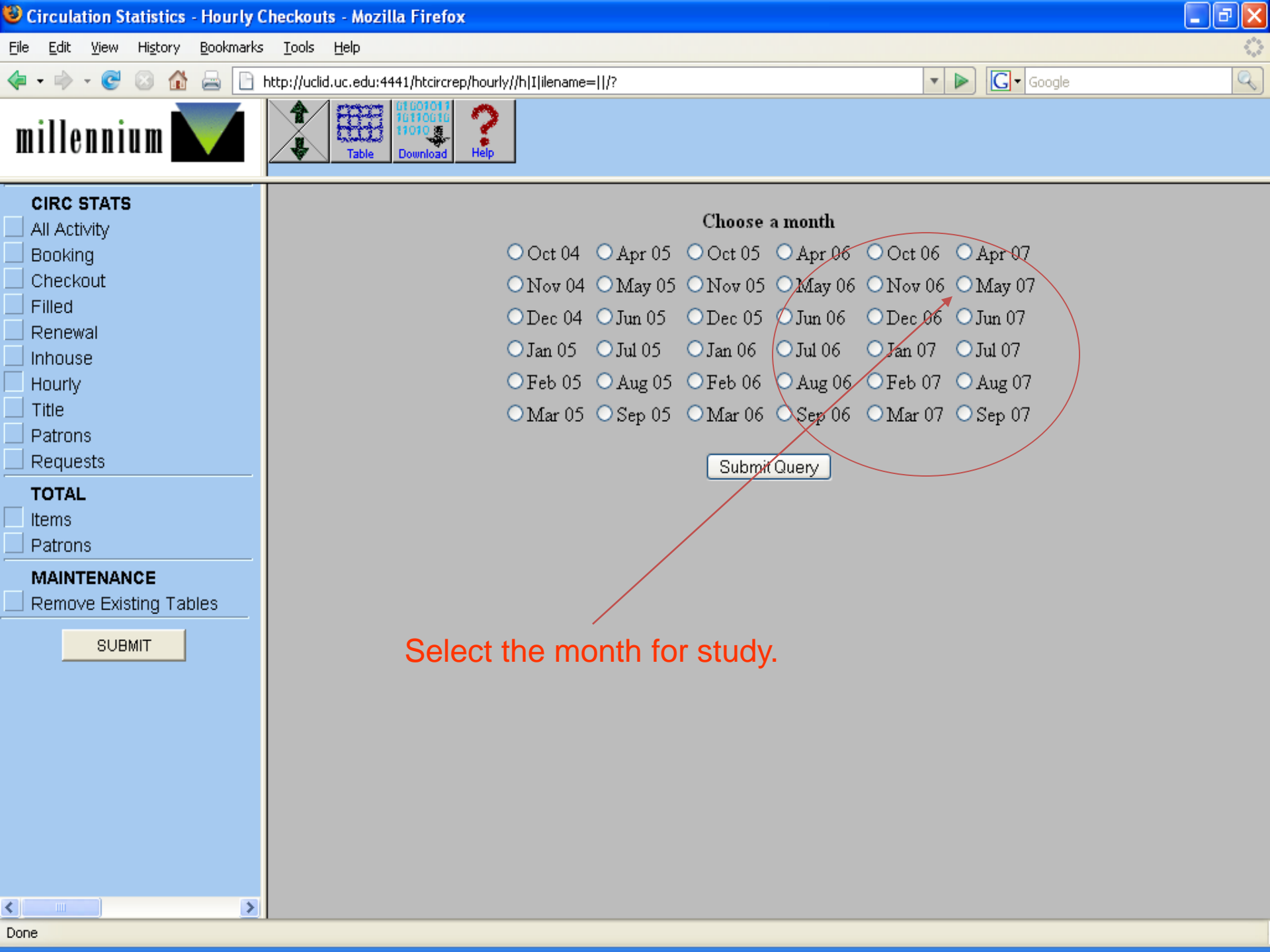
Total by day of week

Sun	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mon	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tue	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Wed	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Thu	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Fri	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sat	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Recalculate

Beware, this function defaults to the oldest month archived. You have to click Recalculate to change the month.

Applet com.iii.applet.menu started



millennium



CIRC STATS

- ☐ All Activity
- ☐ Booking
- ☐ Checkout
- ☐ Filled
- ☐ Renewal
- ☐ Inhouse
- ☐ Hourly
- ☐ Title
- ☐ Patrons
- ☐ Requests

TOTAL

- ☐ Items
- ☐ Patrons

MAINTENANCE

- ☐ Remove Existing Tables

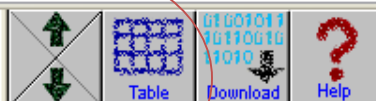
SUBMIT

Choose a month

- | | | | | | |
|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|
| <input type="radio"/> Oct 04 | <input type="radio"/> Apr 05 | <input type="radio"/> Oct 05 | <input type="radio"/> Apr 06 | <input type="radio"/> Oct 06 | <input type="radio"/> Apr 07 |
| <input type="radio"/> Nov 04 | <input type="radio"/> May 05 | <input type="radio"/> Nov 05 | <input type="radio"/> May 06 | <input type="radio"/> Nov 06 | <input type="radio"/> May 07 |
| <input type="radio"/> Dec 04 | <input type="radio"/> Jun 05 | <input type="radio"/> Dec 05 | <input type="radio"/> Jun 06 | <input type="radio"/> Dec 06 | <input type="radio"/> Jun 07 |
| <input type="radio"/> Jan 05 | <input type="radio"/> Jul 05 | <input type="radio"/> Jan 06 | <input type="radio"/> Jul 06 | <input type="radio"/> Jan 07 | <input type="radio"/> Jul 07 |
| <input type="radio"/> Feb 05 | <input type="radio"/> Aug 05 | <input type="radio"/> Feb 06 | <input type="radio"/> Aug 06 | <input type="radio"/> Feb 07 | <input type="radio"/> Aug 07 |
| <input type="radio"/> Mar 05 | <input type="radio"/> Sep 05 | <input type="radio"/> Mar 06 | <input type="radio"/> Sep 06 | <input type="radio"/> Mar 07 | <input type="radio"/> Sep 07 |

Submit Query

Select the month for study.

**CIRC STATS**

- ☐ All Activity
- ☐ Booking
- ☐ Checkout
- ☐ Filled
- ☐ Renewal
- ☐ Inhouse
- ☐ Hourly
- ☐ Title
- ☐ Patrons
- ☐ Requests

TOTAL

- ☐ Items
- ☐ Patrons

MAINTENANCE

- ☐ Remove Existing Tables

SUBMIT

Recalculate

ITEMS CHECKED OUT (GROUP 0 Aug 07)

DAY	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	oth	TOTAL
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Total by day of week

Sun	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mon	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tue	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Wed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Thu	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Fri	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sat	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Recalculate

Then, use the arrow button to scroll through the stat groups to find the terminal group number for the study location.

millennium

**CIRC STATS**

- ☐ All Activity
☐ Booking
☐ Checkout
☐ Filled
☐ Renewal
☐ Inhouse
☐ Hourly
☐ Title
☐ Patrons
☐ Requests

TOTAL

- ☐ Items
☐ Patrons

MAINTENANCE

- ☐ Remove Existing Tables

SUBMIT

Recalculate

ITEMS CHECKED OUT (GROUP 220 Aug 07)

DAY	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	oth	TOTAL
1	23	6	8	14	15	18	24	26	8	12	2	6	8	6	0	0	0	176
2	0	2	16	20	10	4	45	22	22	14	0	3	11	6	0	0	0	175
3	2	0	15	5	9	1	17	4	15	0	0	0	0	0	0	0	0	68
4	0	0	9	11	7	0	3	14	23	0	0	0	0	0	0	0	0	67
5	0	0	0	0	6	4	1	13	1	0	0	0	0	0	0	0	0	25
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	5	8	9	11	21	10	10	12	7	17	2	2	9	18	0	0	0	141
9	9	15	3	4	17	19	31	2	7	13	0	2	5	9	0	0	0	136
10	2	2	2	3	16	26	12	8	13	2	0	0	0	0	0	0	0	86
11	0	0	5	2	9	9	11	6	24	0	0	0	0	0	0	0	0	66
12	0	0	0	0	7	11	3	24	22	0	0	0	0	0	0	0	0	67
13	1	11	2	18	29	16	21	7	32	26	22	9	11	9	0	0	0	214
14	4	1	6	13	4	12	18	19	19	2	16	0	2	3	0	0	0	119
15	1	3	5	36	11	26	21	26	20	2	10	3	6	1	0	0	0	171
16	5	2	5	0	9	26	28	12	16	7	6	1	12	3	0	0	0	132
17	2	1	4	17	26	27	21	5	10	0	0	0	0	0	0	0	0	113
18	0	0	1	6	6	6	3	18	3	0	0	0	0	0	0	0	0	43

220 is the service desk being studied, so this is the data for item transactions each hour that we want to compare to our other data.

CIRC STATS

☐ All Activity
☐ Booking
☐ Checkout
☐ Filled
☐ Renewal
☐ Inhouse
☐ Hourly
☐ Title
☐ Patrons
☐ Requests

TOTAL

☐ Items
☐ Patrons

MAINTENANCE

☐ Remove Existing Tables

SUBMIT

Use Web Management Reports

Next, generate the hourly **Patron** transactions for the same time frame and location.

The resulting chart will actual call them *Borrower Activity*.

Go through the same steps for isolating the necessary stat group.

millennium

**CIRC STATS**

- ☐ All Activity
☐ Booking
☐ Checkout
☐ Filled
☐ Renewal
☐ Inhouse
☐ Hourly
☐ Title
☐ Patrons
☐ Requests

TOTAL

- ☐ Items
☐ Patrons

MAINTENANCE

- ☐ Remove Existing Tables

SUBMIT

Recalculate

BORROWER ACTIVITY (GROUP 220 Aug 07)

DAY	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	oth	TOTAL
1	3	4	5	6	8	8	17	5	3	6	2	6	1	2	0	0	0	76
2	0	2	6	6	6	3	26	9	5	4	0	2	4	4	0	0	0	77
3	2	0	4	2	7	1	16	3	7	0	0	0	0	0	0	0	0	42
4	0	0	4	4	2	0	3	7	7	0	0	0	0	0	0	0	0	27
5	0	0	0	0	3	1	1	3	1	0	0	0	0	0	0	0	0	9
6	3	2	9	8	4	24	7	6	5	3	6	4	6	3	0	0	0	90
7	6	1	3	5	5	8	29	3	5	4	3	3	3	1	0	0	0	79
8	4	4	3	8	7	8	6	9	2	6	1	2	2	1	0	0	0	63
9	2	8	3	3	8	6	19	2	6	6	0	1	3	3	0	0	0	70
10	2	2	2	2	5	9	8	2	9	1	0	0	0	0	0	0	0	42
11	0	0	1	2	5	5	3	5	7	0	0	0	0	0	0	0	0	28
12	0	0	0	0	2	4	3	6	7	0	0	0	0	0	0	0	0	22
13	1	5	2	9	9	12	6	6	17	7	7	3	1	2	0	0	0	87
14	3	1	3	8	3	5	13	6	6	2	4	0	2	1	0	0	0	57
15	1	2	3	13	4	4	18	10	6	1	4	2	4	1	0	0	0	73
16	4	1	1	0	5	5	21	7	6	5	4	1	5	1	0	0	0	66
17	2	1	2	10	7	10	16	4	4	0	0	0	0	0	0	0	0	56
18	0	0	1	1	2	2	1	5	2	0	0	0	0	0	0	0	0	14

How to Use Web Management Reports

In the latest version of Web Management Reports...

The hourly item and patron transaction data are not as detailed in the latest version of the WMR.

The report generated, no matter how one limits it, reports the hours as one large lump of information.

Very frustrating.

web management reports

[REVIEW](#)[CREATE](#)

All Circulation Activity Report

Settings

Dates : Sort By : 

Opening report.xls

You have chosen to open

 **report.xls**which is a: Microsoft Office Excel 97-2003 Worksheet
from: <http://ucldid.uc.edu>

What should Firefox do with this file?

☒ Open with: ☐ Save File☐ Do this automatically for files like this from now on.

OK

Cancel

Circulation Activity Reports

◀ All Circulation Activity

 Circulation Cross Tabs Patrons Checkouts

Note that at the most simple, you choose Last Month and Hour.
The report generates, and....

A

B

C

D

E

1

ALL CIRCULATION TRANSACTIONS by HOUR (Apr 09)

HOUR

TRANSACTIONS

PERCENT

12am-1am

180

0.2%

3-4 am

19

0.0%

4-5 am

735

1.0%

5-6 am

9

0.0%

6-7 am

104

0.1%

7-8 am

561

0.7%

8-9 am

4,207

5.4%

9-10 am

4,805

6.2%

10-11 am

6,247

8.1%

11am-12pm

6,563

8.5%

12-1 pm

7,628

9.9%

1-2 pm

6,695

8.7%

2-3 pm

6,776

8.8%

3-4 pm

7,623

9.9%

4-5 pm

7,111

9.2%

5-6 pm

5,367

6.9%

6-7 pm

3,762

4.9%

7-8 pm

2,489

3.2%

8-9 pm

2,224

2.9%

9-10 pm

2,286

3.0%

10-11 pm

1,227

1.6%

11pm-12am

633

0.8%

Total

77,251

100.0%

There is no
breakdown of
activity per
hour per
location. Not
even if you
limit it by
terminal!

web management reports

REVIEW

CREATE

All Circulation Activity Report

Settings

Dates : Last Month

Sort By : Limit

**The limit selected is based on the available date criteria you selected above. Change to the date above may change the limit you select below

Limit By : Hour

Hours :

4-5pm
5-6pm
6-7pm
7-8pm
8-9pm
9-10pm
10-11pm
11pm-12am

Report By : LOCATION



Opening report.xls

You have chosen to open

report.xls

which is a: Microsoft Office Excel 97-2003 Worksheet
from: http://uclid.uc.edu

What should Firefox do with this file?

☒ Open with Microsoft Office Excel (default)

☐ Save File

☐ Do this automatically for files like this from now on.

OK

Cancel

Even some
creative
parameters...

Circulation Activity Reports

All Circulation Activity

Circulation Cross Tabs

Patrons

Checkouts

	A	B	C	D	E	F	G	H	I	J
1	CIRCULATION ACTIVITY by HOUR (Apr 09)									
2	7-8am; 8-9am; 9-10am; 10-11am; 11-12am; 12pm-1pm; 1-2pm; 2-3pm; 3-4pm; 4-5pm; 5-6pm; 6-7pm; 7-8pm; 8-9pm; 9-10pm; 10-11pm; 11pm-12am									
3	LOCATION	CHKOUTS	CHKINS	RENEWALS	ITEMS CIRC	HOLDS	HI/RECLL	TOTAL #	PERCENT	
4	U of Akron	263	137	221	484	0	0	621	0.8%	
5	Antioch Universit	9	8	11	20	0	0	28	0.0%	
6	Ashland U	14	12	15	29	0	0	41	0.1%	
7	Athenaeum of Oh	19	15	23	42	0	0	57	0.1%	
8	Belmont Tech Co	13	5	9	22	0	0	27	0.0%	
9	Bluffton Universit	25	11	19	44	0	0	55	0.1%	
10	Bowling Green	360	231	358	718	0	0	949	1.2%	
11	CLASSICS	2	0	0	2	0	0	2	0.0%	
12	DAAP	0	0	0	0	1	0	1	0.0%	
13	GEOMATHPHYS	1	0	0	1	0	0	1	0.0%	
14	LANGSAM	6	4	4	10	0	0	14	0.0%	
15	Baldwin Wallace	21	18							
16	CWRU	78	50							
17	Clermont Secure	8	17							
18	CLER Audiovisual	48	48							
19	Cincinnati Christi	10	13	14	24	0	0	37	0.0%	
20	Cleveland Clinic	4	3	5	9	0	0	12	0.0%	
21	CCPL	132	104	136	268	0	0	372	0.5%	
22	Cuyahoga CC	52	28	36	88	0	0	116	0.2%	
23	CLER Stacks	604	514	117	721	168	7	1,410	1.9%	
24	Cedarville U	64	38	72	136	0	0	174	0.2%	
25	Central State U	13	2	10	23	0	0	25	0.0%	

...provide limited detail on what specific hours and/or at which terminal the activity occurred.

Table Circulation Activity Chart Summary Chart Raw Data

How to Use Web Management Reports

Cross-Tab Reports: Shelf Reading

This application of the module has proven particularly useful and utilizes the Cross-Tab function of the WMR. Cross-Tab allows users to measure and compare multiple parameters.

For example, for shelf reading a user can measure which call numbers were used most in various locations at an institution.

How to Use Web Mana

Set your report parameters:

- Stat Type is Checkout.
- Date Range is TBD specific to your inquire period.
- Limit is System
- Rows are Call Numbers
- Columns are Locations.

The screenshot shows the Millennium library system web interface. At the top, there is a header with the 'millennium' logo, a green and black 'M' icon, and three buttons: 'Table', 'Download', and 'Help'. Below the header, there is a form with several sections, each containing a list of checkboxes:

- Month To Date**
 - ☐ Month To Date
 - ☐ Year To Date
 - ☐ User Specified Date
 - ☐ Last Month
- LIMIT**
 - ☐ System
 - ☐ Term
- ROWS**
 - ☐ P TYPE
 - ☐ PCODE1
 - ☐ PCODE2
 - ☐ PCODE3
 - ☐ HOME LIBR
 - ☐ ICODE1
 - ☐ ICODE2
 - ☐ I TYPE
 - ☐ LOCATION
 - ☐ CALL NUMBER
- COLUMNS**
 - ☐ P TYPE
 - ☐ PCODE1
 - ☐ PCODE2
 - ☐ PCODE3
 - ☐ HOME LIBR
 - ☐ ICODE1
 - ☐ ICODE2
 - ☐ I TYPE
 - ☐ LOCATION

At the bottom of the form, there is a button labeled 'CLIPMIT'.

How to Use Web Management Reports

Circulation Crosstab - Checkouts - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://uclid.uc.edu:4440/olinkrep/report4/0/m.9.o.10.9.0/?

millennium

Table Download Help

REPORT

- ☐ Age of Collection
- ☐ Collection Development
- ☐ INN-Reach Circulation
- ☐ Circulation

STAT TYPE

- ☐ Checkout
- ☐ Renewal
- ☐ Holds
- ☐ Hlds/Recall

DATE RANGE

- ☐ Yesterday
- ☐ DBY
- ☐ Month To Date
- ☐ Year To Date
- ☐ User Specified Date
- ☐ Last Month

LIMIT

- ☐ System
- ☐ Term

ROWS

- ☐ P TYPE
- ☐ PCODE1
- ☐ PCODE2
- ☐ PCODE3
- ☐ HOME LIBR

Locations

Recalculate

Crosstab

09-01-07 -> current
Created on 09-23-07

Check-Outs

Call numbers

	ARB Fick	ARB Rare Ovsz	ARB Rare Books	Antioch College	Ashland U	Baldwin Wallace College	Belmont Tech Col	Bluffton University	Bowling Green	CAS A-V Coll	CAS Journals	CA Pe
A0000 - A9999	0	0	0	0	0	0	0	0	2	0	0	
AC 0001 - AC 9999.999	0	0	0	0	0	0	0	0	0	0	0	
AE 0001 - AE 9999.999	0	0	0	0	0	0	0	0	0	0	0	
AE0000 - AE9999	0	0	0	0	0	0	0	0	0	0	0	
AG 0001 - AG 9999.999	0	0	0	0	0	0	0	0	0	0	0	
AI 0001 - AI 9999.999	0	0	0	0	0	0	0	0	0	0	0	
AM 0001 - AM 9999.999	0	0	0	0	0	0	0	0	0	0	0	
ANATOMY	0	0	0	0	0	0	0	0	0	0	0	
AP 0001 - AP	0	0	0	0	0	0	0	0	0	0	0	

Transferring data from uclid.uc.edu...

How to Use Web Management Reports

The results are exported to Excel and the spreadsheet is then narrowed down to our considered locations and provides us a tally of items circulated in particular call number area. The areas with the highest activity are then the focus of more intensive shelf reading by student assistants.

CALL NUMBER + Location

LANGSAM Oversize LANGSAM Stacks

A0000 - A9999	0	0
AC 0001 - AC 9999.999	0	0
AE 0001 - AE 9999.999	0	1
AE0000 - AE9999	0	0
AG 0001 - AG 9999.999	0	1
AI 0001 - AI 9999.999	0	0
AM 0001 - AM 9999.999	0	0
ANATOMY	0	0
AP 0001 - AP 9999.999	0	2
AS 0001 - AS 9999.999	0	0
AUDIOCASSETTE	0	0
AY 0001 - AY 9999.999	0	0
AZ 0001 - AZ 9999.999	0	1
B 0001 - B 0068.9999	0	2
B 0069 - B 0789.9999	0	12
B 0790 - B 5739.999	0	66

How to Use Web Management Reports

INN-Reach/OhioLINK/consortium/multiple location lending data

You can obtain detailed lending/borrowing info for mutli-location activity by using the cross tab.

The reports can be generated in the comprehensive version, then either cut & pasted or downloaded into Excel.

The Excel version creates a nice spreadsheet report, but annual data is often to massive to fit into one spreadsheet in this version, which can lead to some confusion.

How to Use Web Management Reports

Set the parameters. Type of report, dates, limits. Establish the fields to capture in rows and columns.

millennium [Logo] [Table] [Download] [Help]

REPORT

- ☐ Age of Collection
- ☐ Collection Development
- ☐ INN-Reach Circulation
- ☐ Circulation Crosstab

STAT TYPE

- ☐ Checkout
- ☐ Renewal
- ☐ Holds
- ☐ Hlds/Recall

DATE RANGE

- ☐ Yesterday
- ☐ DBY
- ☐ Month To Date
- ☐ Year To Date
- ☐ User Specified Date
- ☐ Last Month

LIMIT

Choose a STARTING and ENDING month

<input type="checkbox"/> Oct 06	<input type="checkbox"/> Apr 07	<input type="checkbox"/> Oct 07	<input type="checkbox"/> Apr 08	<input type="checkbox"/> Oct 08	<input type="checkbox"/> Apr 09
<input type="checkbox"/> Nov 06	<input type="checkbox"/> May 07	<input type="checkbox"/> Nov 07	<input type="checkbox"/> May 08	<input type="checkbox"/> Nov 08	<input type="checkbox"/> May 09
<input type="checkbox"/> Dec 06	<input type="checkbox"/> Jun 07	<input type="checkbox"/> Dec 07	<input type="checkbox"/> Jun 08	<input type="checkbox"/> Dec 08	<input type="checkbox"/> Jun 09
<input type="checkbox"/> Jan 07	<input type="checkbox"/> Jul 07	<input type="checkbox"/> Jan 08	<input type="checkbox"/> Jul 08	<input type="checkbox"/> Jan 09	<input type="checkbox"/> Jul 09
<input type="checkbox"/> Feb 07	<input type="checkbox"/> Aug 07	<input type="checkbox"/> Feb 08	<input type="checkbox"/> Aug 08	<input type="checkbox"/> Feb 09	<input type="checkbox"/> Aug 09
<input type="checkbox"/> Mar 07	<input type="checkbox"/> Sep 07	<input type="checkbox"/> Mar 08	<input type="checkbox"/> Sep 08	<input type="checkbox"/> Mar 09	<input type="checkbox"/> Sep 09

How to Use Web Management Reports

Set the parameters.



The screenshot displays the 'web management reports' interface. At the top, there is a dark blue header with the logo and two buttons: 'REVIEW' and 'CREATE'. Below the header, the main content area is titled 'Circulation Cross Tabs Report'. On the right side, there is a sidebar with a list of reports: 'Circulation Activity Reports', 'All Circulation Activity', 'Circulation Cross Tabs' (highlighted), 'Patrons', and 'Checkouts'. The main area contains a 'Settings' box with the following parameters:

- Dates :** User Specified (dropdown)
- Start Date -** 2009 (year dropdown) April (month dropdown)
- End Date -** 2009 (year dropdown) April (month dropdown)
- Statistic Type :** Checkout (dropdown)
- Limited By :** All Locations (dropdown)
- Rows :** LOCATION (dropdown)
- Columns :** HOME LIBR (dropdown)

Below the settings box is a 'Submit' button with a play icon.

How to Use Web Management Reports

millennium



Table

Download

Help

REPORT

- ☐ Age of Collection
- ☐ Collection Development
- ☐ INN-Reach Circulation
- ☐ Circulation Crosstab

STAT TYPE

- ☐ Checkout
- ☐ Renewal
- ☐ Holds
- ☐ Hlds/Recall

DATE RANGE

- ☐ Yesterday
- ☐ DBY
- ☐ Month To Date
- ☐ Year To Date
- ☐ User Specified Date
- ☐ Last Month

LIMIT

- ☐ System
- ☐ Term

ROWS

- ☐ P TYPE
- ☐ PCODE1
- ☐ PCODE2
- ☐ PCODE3
- ☐ HOME LIBR
- ☐ ICODE1
- ☐ ICODE2
- ☐ I TYPE
- ☐ LOCATION
- ☐ CALL NUMBER

Recalculate

Crosstab

Check-Outs

Results as seen in the comprehensive version.

07-2008 -> 06-2009

Created on 07-/2-4/

	ARB C.U. Coll	ARB Fick	ARB Fick Oversize	ARB Rare Bk Incun	ARB Rare Bk Ovsz	ARB Rare Books	ARB Reference	Antioch University	Ashland U	Athenaeum of Ohio	Baldwin Wallace College	Belmont Tech Col	Bluffton University	Bowling Green
ARB	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Antioch University	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ashland U	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Athenaeum of Ohio	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Baldwin Wallace College	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Belmont Tech Col	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bluffton University	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bowling Green	0	0	0	0	0	0	0	0	0	0	0	0	0	0
CAS	0	0	0	0	0	0	0	1	4	3	3	2	1	36
CCM	0	0	0	0	0	0	0	2	22	10	74	1	11	348
CCPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0
CECH	0	0	0	0	0	0	0	0	2	1	1	1	2	16

How to Use Web Management Reports

	A	B	C	D	E	F	G	H	I	J	K
1	Circulation Crosstab										
2	Checkout By LOCATION By HOME LIBR										
3		ARB	Antioch University	Ashland U	Athenaeum of Ohio	Baldwin Wallace College	Belmont Tech Col	Bluffton University	Bowling Green	CAS	CCM
4	ARB Fick	0	0	0	0	0	0	0	0	0	0
5	ARB Fick Oversiz	0	0	0	0	0	0	0	0	0	0
6	ARB Rare Bk Ovs	0	0	0	0	0	0	0	0	0	0
7	ARB Rare Books	0	0	0	0	0	0	0	0	0	0
8	Antioch University	0	0	0	0	0	0	0	0	0	0
9	Ashland U	0	0	0	0	0	0	0	0	0	2
10	Athenaeum of Oh	0	0	0	0	0	0	0	0	0	0
11	Baldwin Wallace	0	0	0	0	0	0	0	0	0	11
12	Belmont Tech Co	0	0	0	0	0	0	0	0	0	0
13	Bluffton University	0	0	0	0	0	0	0	0	0	5
14	Bowling Green	0	0	0	0	0	0	0	0	5	53
15	CAS A-V Coll	0	0	0	0	0	0	0	0	9	0
16	CAS Faculty Res	0	0	0	0	0	0	0	0	104	0
17	CAS Job Resourc	0	0	0	0	0	0	0	0	2	0
18	CAS Journals	0	0	0	0	0	0	0	0	4	0
19	CAS Perm Res	0	0	0	0	0	0	0	0	73	0
20	CAS Ref Histor	0	0	0	0	0	0	0	0	0	0
21	CAS Reference	0	0	0	0	0	0	0	0	14	0
22	CAS Reserves	0	0	0	0	0	0	0	0	895	0
23	CAS Software	0	0	0	0	0	0	0	0	1	0
24	CAS Stacks	0	1	0	0	0	0	0	2	177	3
25	CCM Journals	0	0	0	0	0	0	0	0	0	6
26	CCM LCTR Hphon	0	0	0	0	0	0	0	0	2	275
27	CCM LSTN CTR	0	0	0	0	0	0	0	0	0	0
28	CCM Listening Cl	0	0	0	0	0	0	0	0	26	1172
29	CCM Microforms	0	0	0	0	0	0	0	1	0	0
30	CCM Office	0	0	0	0	0	0	0	0	0	0
31	CCM Oversize	0	0	0	0	0	0	0	1	0	11

Results as seen in the newer Excel version.

How to Use Web Management Reports

To further utilize the cross-tab, users can narrow the search parameters down to a terminal login location and analyze what was checked out at a specific service point by users as designated by their local home library.

Other useful reports:

- in the INN-Reach section, where users can discover their data for Visiting OhioLINK checkouts
- in the CIRC STATS section, tracking various part of the collection by PTYPE

How to Use Web Management Reports

Questions?

Closing remarks

klinedb@ucmail.uc.edu