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WMS Connect: IPEDS and ACRL Reporting

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**ACRL/IPEDS
&
WMS**

imgflip.com

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Eastern Kentucky University Libraries
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he atacc



but most importantly

he cry at his snacc



"Trying to explain what we do to derive numbers for ACRL/IPEDS in 20 minutes is kind of like trying to write a one paragraph summary for War and Peace". In other words, I have struggled with this presentation. I settled on a quick discussion of the confounding factors at play, a couple of "case studies" of how to answer different questions, and a resource list - because I am far from being the expert on this topic!

Confounding Factors

The volatility of the report definitions and metrics

New This Year

IPEDS has provided new instructions for the following questions:

- Question 43 Column B: Digital/Electronic Serials
- Question 60 Column B: Total Digital/Electronic Circulation or Usage
- Questions 61 and 62: COUNTER Release 4 Circulation or Usage
- Question 63: E-series Usage
- Question 68: Number of Branch and Independent Libraries (note about parent/child relationships)

Additionally, these questions are new this year:

- Questions 72 and 73: Number of and Attendance at Asynchronous Presentations
- Questions 74 and 75: Number of and Attendance at All Presentations to Groups (Include Synchronous and Asynchronous)
- Question 77: Number of Weeks the Main Library Was Closed Due to COVID-19
- Question 78: Number of Weeks the Main Library Had Limited Occupancy Practices Due to COVID-19

60 Column B. Total Digital/Electronic Circulation or Usage

FY2019

Please note: These definitions will be updated next year for COUNTER 5 changes. If you are reporting with COUNTER 5 data, please indicate in your notes which data you chose to collect.

Report usage of digital/electronic titles whether viewed, downloaded, or streamed. **Include usage for e-books and e-media titles only.** Include titles even if they were purchased as part of a collection or database. Do not include e-series and institutional repository documents, which are reported separately.

FY2020

60 Column B. Total Digital/Electronic Circulation or Usage [with New IPEDS Instructions]** Report usage of digital/electronic titles whether viewed, downloaded, or streamed. **Include usage for e-books, e-series, and e-media titles even if they were purchased as part of a collection or database.**

We find out changes *after* we track.

Confounding Factors

The complexity of the instructions

40 Column B. Digital/Electronic Books (Include Government Documents)

E-books are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). Report the number at the administrative entity level. **do not duplicate unit count for each branch.**

Include:

- E-book titles owned or leased by the library if individual titles are cataloged and/or searchable through the library catalog or discovery system.
- E-book titles in aggregated sets in which the library selected the aggregator even if not each individual e-book title.
- Government documents, **locally digitized electronic books and electronic theses and dissertations.**
- Digital music scores if searchable by title through the library catalog or discovery system.
- Open access titles if the individual titles are searchable through the library's catalog or discovery system.

Exclude:

- E-book titles from HathiTrust, Center for Research Libraries, Internet Archive, and similar collections unless the library owns the digitized item and it is accessible under current copyright law.
- E-book titles in demand-driven acquisition (DDA) or patron-driven acquisition (PDA) collections until they have been purchased by the library.

Additional guidance:

- Count each e-book title as a single title, regardless of its number of user seats.
- If possible, **do not report duplicate titles even if the titles are in two or more databases or services.** Report the titles based upon the cataloged bibliographic record rather than holdings records attached to the bibliographic record.
- E-book titles may be found through the library's link resolver knowledge base in addition to the catalog or discovery system.
- **A dissertation database such as ProQuest Dissertation & Theses Database is reported as a database.**

40a. Books [Volume Count]

IPEDS discontinued the reporting of physical volume counts in 2016. ACRL understands that there is trend analysis value for this long-standing measure. Therefore, if available:

Report the number of volumes using the ANSI/NISO Z39.7-2013 (section 4) definition for volume, which is as follows:

"A single physical unit of any printed, typewritten, handwritten, mimeographed, or processed work, distinguished from other units by a separate binding, encasement, portfolio, or other clear distinction, which has been cataloged, classified, and made ready for use, and which is typically the unit used to charge circulation transactions. Either a serial volume is bound, or it comprises the issues that would be bound together if the library bound all serials."

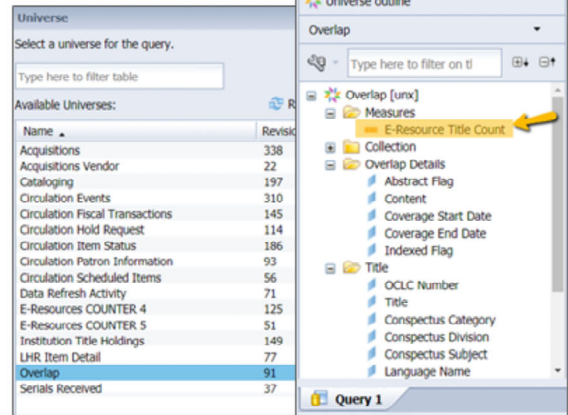
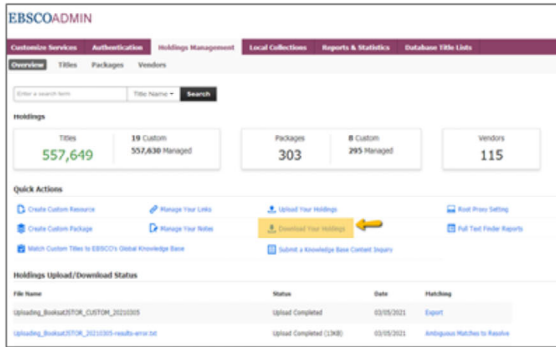
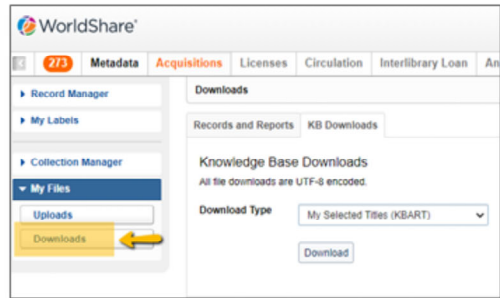
Additional guidance:

- **Include duplicate copies, bound**

Our data gathering has to be so granular that we can not only adjust to changing definitions, but also meet the very complex inclusions/exclusions.

Confounding Factors

The location(s) and structure of the data



The data lives in Collection Manager, Report Writer, and our EDS link resolver

Confounding Factors

The file size challenge

| Name | Size |
|---|--------------|
| COLLECTIONS_KBART WMS 7.21.20.txt | 1,451,733 KB |
| COLLECTIONS_GOVDOCS WMS KBART.txt | 19,245 KB |
| COLLECTIONS_KB Selected Collections 7.21.20.txt | 34 KB |

- COLLECTIONS_KBART_Journal_de-duped.xlsx
- COLLECTIONS_OA EDS.csv
- COLLECTIONS_KBART_Book_de-duped.xlsx
- COLLECTIONS_KBART_Streaming Video_de-duped.csv
- COLLECTIONS_KBART_Thesis_de-duped.csv
- COLLECTIONS_KBART_Unspecified_de-duped.csv
- COLLECTIONS_KBART_Web site_de-duped.csv
- COLLECTIONS_KBART_Database_de-duped.csv
- COLLECTIONS_KBART_Journal_de-duped.csv
- COLLECTIONS_KBART_Newsletter_de-duped.csv
- COLLECTIONS_KBART_Newspaper_de-duped.csv
- COLLECTIONS_KBART_Proceedings_de-duped.csv
- COLLECTIONS_KBART_Streaming Audio_de-duped.csv
- COLLECTIONS_KBART_Book Series_de-duped.csv

Case #1: Collections Expenditures

| Expenses (Exclude Staff) | | |
|-------------------------------|---|---------------------------------------|
| # | Question | Amount |
| Materials / Services Expenses | | |
| 20 | One-time purchase of books, serial backfiles, and other materials | \$ |
| 20a | > E-books (if available) | \$ |
| 21 | Ongoing commitments to subscriptions | \$ |
| 21a | > E-books (if available) | \$ |
| 21b | > E-journals (if available) | \$ |
| 22 | All other materials/services cost | \$ |
| 23 | Total materials/services expenses | <i>calculated sum of 20 + 21 + 22</i> |

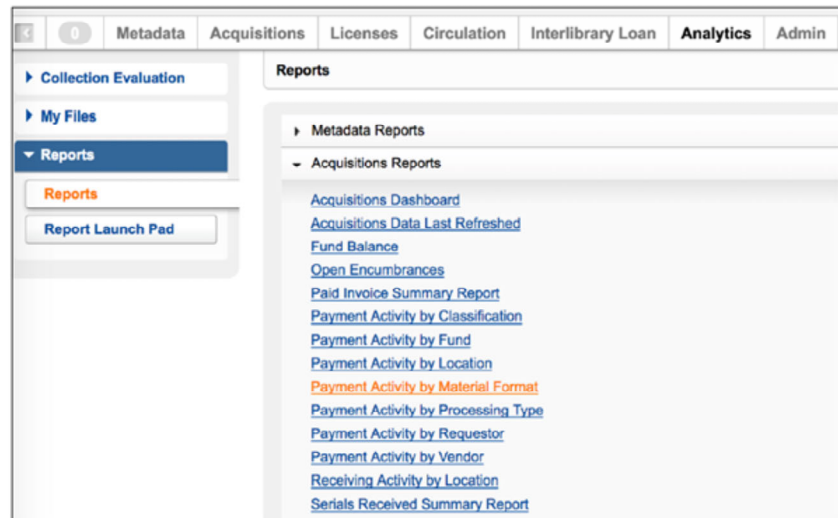
Factors

1. One-time or Ongoing

Subsets:

1. eBooks
2. eJournals

Standard reports are an option if you consistently input data based on the output you need.



So, how do you tease out the factors?

Standard Reports

PALNI Libguide:

ACRL, IPEDS, and National Surveys

<https://libguides.palni.edu/ipeds>

Payment Activity by Material Format Report
DePaul University Libraries
Currency: USD

Report Criteria: From Payment Date: 2016-07-01 To Payment Date: 2017-06-30
Budget Status: CURRENT/CLOSED Budget Period: All
Order Type: All Acquisitions Type: All
Processing Type: All Invoice Item Type: All
Branch Name: All
Shelving Location (Restrictions): All
Material Format: All
Vendor Name: All

| Material Format | Copies Expended | Amount Expended | Average Expenditure (Per Copy) |
|-------------------|-----------------|-----------------|--------------------------------|
| Subscription | 4,330 | 129.90 | 30.45 |
| Book_CD | 9,830 | 30,359.85 | 3,088.58 |
| Book_Continuing | 19,830 | 61,883.85 | 3,119.27 |
| Book_Digital | 1,830 | 19.53 | 10.65 |
| Book_LargePrint | 2,389,830 | 113,201.37 | 47.21 |
| Book | 2,830 | 1,179.86 | 418.33 |
| CommaFile_Digital | 1,830 | 309.83 | 169.30 |
| CommaFile | 4,830 | 133.45 | 27.63 |
| Int_Digital | 229,830 | 336,954.79 | 1,466.84 |
| All | 117,830 | 513,649.97 | 435.78 |
| Material Format | 0.000 | 724,887.24 | 0.00 |
| Audio | 188,000 | 14,381.85 | 76.50 |
| Book_CD | 28,000 | 729.79 | 27.72 |
| Book_Continuing | 3,000 | 8,884.75 | 2,961.58 |
| Book_Digital | 1,000 | 8.81 | 8.81 |
| Book_LargePrint | 3,000 | 27,684.39 | 9,228.13 |
| Book | 8,000 | 3,051.23 | 381.40 |
| CommaFile | 3,000 | 207.87 | 69.29 |
| Video_DVD | 170,000 | 2,293.85 | 13.49 |
| Video_Digital | 118,000 | 102,217.42 | 866.20 |
| Grand Total | 5,624,880 | 3,381,863.79 | 599.67 |

In this example, provided by PALNI, you can see that they use the **Payment Activity by Material Format Report** to get totals for one time and ongoing expenditures.

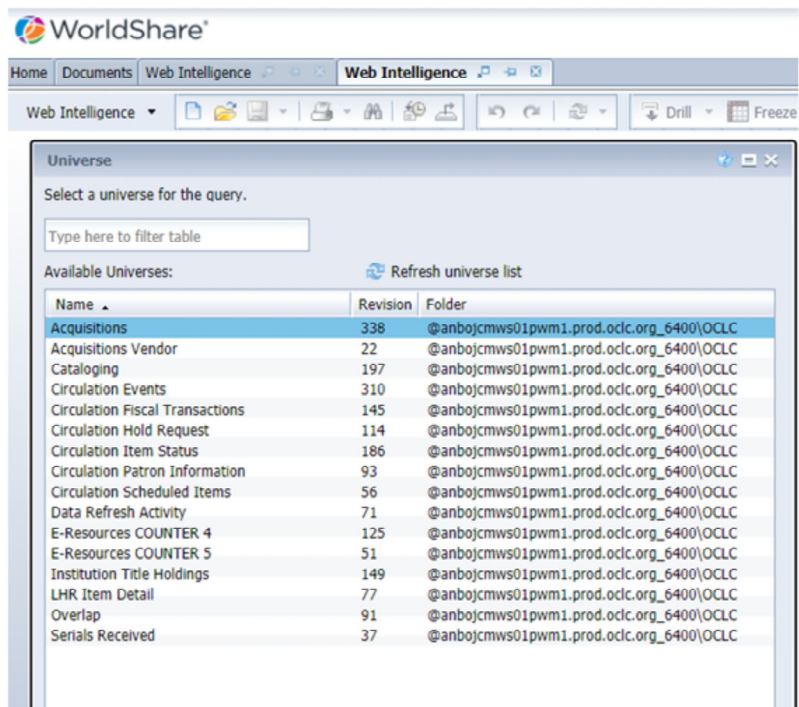
To get an accurate figure with this report, look through the variables and make sure your acquisitions staff are coding consistently

| Branch Name | Title | Vendor Name | Expended Amount | Shelving Location | Fund Code - Subject | Fund Code - Format | Material Format | Format - Coded | Banner Code | Book / Media | Print / Online | Onetime/ Ongoing | Acquisitions Type | Processing Type | Staff Order Item Notes | Invoice Last Paid Date | Budget Period |
|---------------|------------------|--------------|-----------------|----------------------|---------------------|--------------------|-----------------|----------------|-------------|--------------|----------------|------------------|-------------------|--------------------|------------------------|------------------------|---------------|
| Music Library | Sept episode | Steve Weis | 24.31 | Scores | MUS | MS | MsScr | Score | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLUME_WORK | | 2/19/2020 | 2019 Jul |
| Main | Serials Direct | Library Dis | 800.00 | Online databases | MUL | DB | Book_Co | Database | 760620 | - Media | Online | Ongoing | SUBSCRIPTION | E_PRODUCT | | 7/29/2019 | 2019 Jul |
| Main | Serials Review | EBSCO | 615.00 | Online eJournals | LIS | SE | Jrnl_Digit | eJournal | 760630 | - Book | Online | Ongoing | -- | | I0559183 | 2/26/2020 | 2019 Jul |
| Main | Service charge | EBSCO | 64.67 | | SER | DB | Other | Service Ch | 760600 | - Book | Online | Ongoing | -- | | I0559007 | 4/14/2020 | 2019 Jul |
| | Victorian Popu | Adam Matfr | 149.76 | Online databases | JUS | DB | Book_Co | Database | 760620 | - Media | Online | Ongoing | -- | | Not in WMS | ? | |
| Special Colle | Virginia Gene | EBSCO | 75.00 | Online eJournals | SPC | SP | Journal | Journal | 760630 | - Book | Print | Ongoing | SUBSCRIPTION | SERIAL | Not in WMS | ? | 2019 Jul |
| Main | West's south | Thomson F | 1,242.01 | 3rd Floor - Law Lib | LAW | SP | Jrnl | eJournal | 760630 | - Book | Print | Ongoing | SUBSCRIPTION | SERIAL | | 12/13/2019 | 2019 Jul |
| Main | Wiley Tokens | Library Dis | 18,900.00 | | LP | | Other | Tokens / P | 740270 | - Book | Online | Onetime | -- | | | 10/9/2019 | 2019 Jul |
| Main | WMS Catalog | OCLC, Inc. | 9,349.74 | | CC | | Other | Cataloging | 736100 | - Media | Online | Ongoing | -- | | | 5/14/2020 | 2019 Jul |
| Main | Woman suffra | Amazon.co | 9.99 | | WOM | MS | Other | Book | 760610 | - Book | Print | Onetime | -- | | | 9/4/2019 | 2019 Jul |
| LRC | Yes No Maybe | Follett Libr | 17.19 | Youth Collection - E | LRC | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLL | Banner = PC00 | 5/21/2020 | 2019 Jul |
| Main | Yoga, meditati | Amazon.co | 66.44 | 4th Floor - Books | PHI | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLL | send to ILL | 8/23/2019 | 2019 Jul |
| Main | You : a novel | Amazon.co | 9.59 | 4th Floor - Books | ENG | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLL | send to ILL | 1/27/2020 | 2019 Jul |
| LRC | You be you! : If | Follett Libr | 17.16 | Youth Collection - E | LRC | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLL | Banner PC101 | 9/13/2019 | 2019 Jul |
| LRC | You loves Ewe | Follett Libr | 15.49 | Youth Collection - E | LRC | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLL | Banner PC020 | 1/14/2020 | 2019 Jul |
| LRC | Your students | Amazon.co | 30.95 | Professional Colle | EDU | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLL | Send to LRC | 11/13/2019 | 2019 Jul |
| LRC | YOU'RE MISSI | Follett Libr | 15.49 | Youth Collection - E | LRC | MS | Book | Book | 760610 | - Book | Print | Onetime | FRM_ORDER | SINGLE_VOLUME_WORK | | 7/29/2019 | 2019 Jul |
| Main | Youth Violenc | EBSCO | 535.00 | Online eJournals | JUS | SE | Jrnl_Digit | eJournal | 760630 | - Book | Online | Ongoing | SUBSCRIPTION | SERIAL | P0039573 I055 | 2/25/2020 | 2019 Jul |
| Main | Zero to three. | EBSCO | 274.00 | Reference Room - | OCC | SP | Jrnl | Journal | 760630 | - Book | Print | Ongoing | SUBSCRIPTION | E_PRODUCT | I0559157 | 2/26/2020 | 2019 Jul |

Unfortunately when I ran this Custom report based on the Acquisitions Universe, I found that about 30% of our expenditures had not been marked as firm or subscription. I have asked Acquisitions to mark everything as firm or subscription moving forward - so the onetime/ongoing factor will be taken care of.

Custom Reports

https://help.oclc.org/Library_Management/WorldShare_Reports/Report_objects/Report_objects_by_Universe



So I decided to revisit report writer and see if changing the variables would require less manual manipulation on my part.

| Invoice Item | Invoice Amount | Resource Measure | Acquisitions | Order Type | Processing Type | Branch Name | Shelving Location | Fund Code | Fund Name Level 2 | Fund Name Level 3 |
|------------------|----------------|------------------|--------------|--------------|-----------------|--------------|-------------------|-----------|-------------------|--------------------------------------|
| 13 stories abc | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Learning Res | Youth Collecti | LRC-BOP | **Monographs | book/one time/print |
| 44 poems for | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Main Library | 4th Floor - Bo | ENG-BOP | **Monographs | book/one time/print |
| AAPG bulletin | | KBWC_ENTR | SUBSCRIPTI | PURCHASE_ORD | E_PRODUCT | Main Library | Online eJourn | GLY-SE | *Serials | Serial Electronic |
| A Ben of all tr | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Learning Res | Youth Collecti | LRC-BOP | **Monographs | book/one time/print |
| A book for Es | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Learning Res | Youth Collecti | LRC-BOP | **Monographs | book/one time/print |
| Above the rim | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Learning Res | Youth Collecti | LRC-BOP | **Monographs | book/one time/print |
| A bowl full of j | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Learning Res | Youth Collecti | LRC-BOP | **Monographs | book/one time/print |
| Academic Sei | | KBWC_COLL | SUBSCRIPTI | PURCHASE_ORD | E_PRODUCT | Main Library | Online eJourn | MUL-SB | *Serials | Serial Bundle |
| Academic Vid | | KBWC_COLL | SUBSCRIPTI | PURCHASE_ORD | E_PRODUCT | Main Library | Online stream | MUL-MAE | **Monographs | media/annual subscription/electronic |
| Academy of N | | KBWC_ENTR | SUBSCRIPTI | PURCHASE_ORD | E_PRODUCT | Main Library | Online eJourn | BUS-SE | *Serials | Serial Electronic |
| A Charlie Bro | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Learning Res | Youth Collecti | LRC-BOP | **Monographs | book/one time/print |
| A Companion | | KBWC_ENTR | FIRM_ORDEI | PURCHASE_ORD | E_PRODUCT | Main Library | Online eBook | ENG-BOE | **Monographs | book/one time/electronic |
| A Companion | | KBWC_ENTR | FIRM_ORDEI | PURCHASE_ORD | E_PRODUCT | Main Library | Online eBook | ENG-BOE | **Monographs | book/one time/electronic |
| ACRLmetrics | | WORLDCAT | SUBSCRIPTI | PURCHASE_ORD | SERIAL | Main Library | Online databa | STF-DB | *Databases | Staff-DB |
| Addicted to pe | | WORLDCAT | FIRM_ORDEI | PURCHASE_ORD | SINGLE_VOLUME | Main Library | 4th Floor - Bo | MUL-BOP | **Monographs | book/one time/print |

I also changed the fund structure to build in more certainty about what type of resource is reflected.

WorldShare

Welcome: Kelly Smith | Applications | Preferences | Help menu | Log off

Home | Documents | **KS_Expenses**

Query Panel

Add Query

Universe outline

Acquisitions

Type here to filter on the

- Institution Name
- Institution Symbol
- Title
 - Author
 - Editor
 - ISBN
 - ISSN
 - KB Collection Name
 - KB Collection Identifier
 - KB Title Identifier
 - Material Format
 - OCLC Number
 - Provider Name
 - Publication Date
 - Publisher Name
 - Resource Metadata Type
 - Title
- Copy
 - Arrival Date
 - Copy Cancellation Date
 - Copy Cancellation Day
 - Copy Cancellation Day Name
 - Copy Cancellation Month
 - Copy Cancellation Month Name
 - Copy Cancellation Year
 - Last Claimed Date
 - Last Claimed Day
 - Last Claimed Day Name
 - Last Claimed Month
 - Last Claimed Month Name
 - Last Claimed Year
 - Order Date
 - Copy Created Date
 - Copy Created Day
 - Copy Created Day Name
 - Copy Created Month

Result Objects

Invoice Date | Title | Invoice Amount (Institution Currency) | Resource Metadata Type | Invoice Item Expenditure Type | Invoice Item Product Type | Acquisitions Type | Order Type | Processing Type | Branch Name | Shelving Location

Fund Code | Fund Name Level 2 | Fund Name Level 3 | Fund Name Level 4 | Call Number | Staff Order Item Notes | ISBN | ISSN

Query Filters

Budget Period Start Date Equal to 7/1/2019

Data Preview

| Invoice Date | Title | Invoice Amount | Resource Metadata Type | Invoice Itm | Invoice Item Product Type | Acquisitions Type | Order Ty |
|---------------------|--------------------------------|----------------|------------------------|-------------|---------------------------|-------------------|----------|
| 2019/01/01 00:00:00 | American Mission: Norton | 99.95 | KBWC_ENTRY | DEBIT | BIBLIOGRAPHIC_INVOICE... | PSRM_ORDER | PURCHAS |
| 0001/01/01 00:00:00 | American Society for Microb... | 4,380.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/11/08 00:00:00 | American Society for Microb... | 4,380.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 0001/01/01 00:00:00 | Ancestry Library Edition | 5,941.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/07/01 00:00:00 | Ancestry Library Edition | 5,941.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 0001/01/01 00:00:00 | Applied Science & Technolo... | 0.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/01/01 00:00:00 | Applied Science & Technolo... | 0.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 0001/01/01 00:00:00 | As American as Public Scho... | 169.95 | KBWC_ENTRY | DEBIT | BIBLIOGRAPHIC_INVOICE... | PSRM_ORDER | PURCHAS |
| 2019/06/20 00:00:00 | As American as Public Scho... | 169.95 | KBWC_ENTRY | DEBIT | BIBLIOGRAPHIC_INVOICE... | PSRM_ORDER | PURCHAS |
| 2020/01/13 00:00:00 | Assessing Alcohol Problems | 350.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 2019/11/13 00:00:00 | Assessing Alcohol Problems | 350.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 0001/01/01 00:00:00 | Baker Visual Guide | 9,820.62 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/07/01 00:00:00 | Baker Visual Guide | 9,820.62 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2020/01/17 00:00:00 | Baker Visual Guide | 9,820.62 | LOCAL | CREDIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 2019/08/02 00:00:00 | Baker Visual Guide | 9,820.62 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 0001/01/01 00:00:00 | Binder services | 913.51 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 2019/07/01 00:00:00 | Binder services | 913.51 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 0001/01/01 00:00:00 | Book Complete | 20,030.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/07/01 00:00:00 | Book Complete | 20,030.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 0001/01/01 00:00:00 | Book covers | 742.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 2019/07/01 00:00:00 | Book covers | 742.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 0001/01/01 00:00:00 | Books at 25TOR Evidence B | 11,240.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/04/17 00:00:00 | Books at 25TOR Evidence B | 11,240.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2020/03/01 00:00:00 | Books@25TOR DGA | 1,800.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 2020/03/01 00:00:00 | Books@25TOR DGA | 1,800.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 0001/01/01 00:00:00 | Bottom Line in Education: 1 | 8,120.00 | KBWC_ENTRY | DEBIT | BIBLIOGRAPHIC_INVOICE... | PSRM_ORDER | PURCHAS |
| 2019/06/29 00:00:00 | Bottom Line in Education: 1 | 8,120.00 | KBWC_ENTRY | DEBIT | BIBLIOGRAPHIC_INVOICE... | PSRM_ORDER | PURCHAS |
| 2019/07/01 00:00:00 | Bottom Line in Education: 1 | 8,120.00 | LOCAL | DEBIT | NON_BIBLIOGRAPHIC_INV... | | PURCHAS |
| 0001/01/01 00:00:00 | Business Expert Press 2020 | 6,000.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/11/20 00:00:00 | Business Expert Press 2020 | 6,000.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 0001/01/01 00:00:00 | Business Source Complete | 12,330.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 2019/07/01 00:00:00 | Business Source Complete | 12,330.00 | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |
| 0001/01/01 00:00:00 | CCH Internet Employment S | ... | KBWC_COLLECTION | DEBIT | BIBLIOGRAPHIC_INVOICE... | SUBSCRPTION | PURCHAS |

Type a text to filter the values

Query 1

Refresh

Level 2

in & Access

in & Access

Support

Day, March 11, 2021

New Document

- Acquisitions Type
- Branch Name
- Call Number
- Fund Code
- Fund Name Level 1
- Fund Name Level 2
- Fund Name Level 3
- Invoice Date
- Invoice Item Description
- Invoice Item Expenditure Type
- Invoice Item Product Type
- ISBN
- ISSN
- Order Type
- Processing Type
- Resource Metadata Type
- Shelving Location
- Staff Order Item Notes
- Title
- Invoice Amount (Institution Currency)

| Sum of Invoice Amount (Institution Currency) ** | | | |
|---|-----------------------|---------------------|-----------------------|
| categories | ongoing | one time | Grand Total |
| Serials | \$569,914.00 | | \$569,914.00 |
| Serial Bundle | \$348,020.52 | | \$348,020.52 |
| Serial Electronic | \$161,227.94 | | \$161,227.94 |
| Serial Print | \$58,857.32 | | \$58,857.32 |
| Serial Combo | \$1,808.22 | | \$1,808.22 |
| Databases | \$508,478.09 | | \$508,478.09 |
| Databases | \$508,478.09 | | \$508,478.09 |
| Collection Support | \$157,142.42 | | \$157,142.42 |
| Cataloging Services | \$146,739.42 | | \$146,739.42 |
| Digital Collections Support | \$8,678.00 | | \$8,678.00 |
| Consortial Fees | \$1,725.00 | | \$1,725.00 |
| Monographs | \$70,334.56 | \$76,247.00 | \$146,581.56 |
| book | \$35,894.56 | \$44,745.22 | \$80,639.78 |
| media | \$34,440.00 | \$31,501.78 | \$65,941.78 |
| Library Express | | \$58,590.52 | \$58,590.52 |
| Pay per view | | \$55,072.00 | \$55,072.00 |
| ILL Copyright | | \$3,180.19 | \$3,180.19 |
| Borrowing Fees | | \$338.33 | \$338.33 |
| Preservation & Access | | \$2,403.10 | \$2,403.10 |
| Binding | | \$784.60 | \$784.60 |
| Library Supplies | | \$703.51 | \$703.51 |
| (blank) | | \$697.00 | \$697.00 |
| Processing Services (Shelf-ready) | | \$217.99 | \$217.99 |
| Shipping | | \$529.19 | \$529.19 |
| Shipping | | \$529.19 | \$529.19 |
| Gift Revenue | | -\$7,523.00 | -\$7,523.00 |
| Gift Revenue | | -\$7,523.00 | -\$7,523.00 |
| Grand Total | \$1,305,869.07 | \$130,246.81 | \$1,436,115.88 |

Fund Name Level... ☰ 🔍

- electronic
- n/a
- print


Factors

- One-time or Ongoing

Subsets:

- eBooks
- eJournals

| Sum of Invoice Amount (Institution Currency) ** | | | |
|---|-----------------------|--------------------|-----------------------|
| categories | ongoing | one time | Grand Total |
| Serials | \$511,056.68 | | \$511,056.68 |
| Serial Bundle | \$348,020.52 | | \$348,020.52 |
| Serial Electronic | \$161,227.94 | | \$161,227.94 |
| Serial Combo | \$1,808.22 | | \$1,808.22 |
| Databases | \$508,478.09 | | \$508,478.09 |
| Databases | \$508,478.09 | | \$508,478.09 |
| Monographs | \$63,005.56 | \$65,167.99 | \$128,173.55 |
| media | \$34,440.00 | \$31,283.25 | \$65,723.25 |
| book | \$28,565.56 | \$33,884.74 | \$62,450.30 |
| Grand Total | \$1,082,540.33 | \$65,167.99 | \$1,147,708.32 |

Fund Name Level... 

electronic

n/a

print

Factors

- One-time or Ongoing

Subsets:

- eBooks
- eJournals

Add a slicer to limit to electronic

| FY20 | Frequency | Ongoing | Onetime | xLibguides | Grand Total |
|------------------------------------|---------------------|-------------------|-----------------|---------------------|-------------|
| Banner Buckets | Ongoing | | | | |
| 541010 - Gift Revenue | (500.00) | | (1,047.11) | | (500.00) |
| 560085 - Lost Item Replacement Fee | | | | | (1,047.11) |
| 736100 - Software | 125,955.96 | | | | 125,955.96 |
| 740270 - Library Express | | | 118,746.55 | | 118,746.55 |
| 742030 - Maintenance | 66,043.00 | | 295.00 | | 66,338.00 |
| 760600 - Service Charge | 4,637.46 | | | | 4,637.46 |
| 760600 - Shipping | 10.00 | | 971.31 | | 981.31 |
| 760610 - Monographs | 104,227.60 | | 56,931.98 | | 161,159.58 |
| 760620 - Databases | 616,435.37 | | | | 616,435.37 |
| 760630 - Serials | 669,180.62 | | | | 669,180.62 |
| 760640 - Preservation | | | 3,024.17 | | 3,024.17 |
| OPERATING - Libguides | | | | 7,385.00 | 7,385.00 |
| Grand Total | 1,585,990.01 | 178,921.90 | 7,385.00 | 1,772,296.91 | |

| Fund Code - Subject |
|---------------------|
| ACC |
| AFR |
| AGR |
| ANT |
| APP |
| ART |
| BIO |
| BUS |
| CC |
| CD |
| CF |
| CHE |
| COM |
| CPS |
| ECO |
| EDU |
| ENG |
| ENV |
| EXE |
| FAM |

| Print / Online | Book / Media |
|----------------|--------------|
| Online | Book |
| Print | Media |
| xLibguides | xLibguides |

| Insert Slicers |
|--|
| <input type="checkbox"/> Source |
| <input type="checkbox"/> Branch Name |
| <input type="checkbox"/> Title |
| <input type="checkbox"/> Vendor Name |
| <input type="checkbox"/> Vendor Name - Normalized |
| <input type="checkbox"/> Expended Amount |
| <input type="checkbox"/> Shelving Location |
| <input type="checkbox"/> Fund Code - Subject |
| <input type="checkbox"/> Fund Code - Format |
| <input type="checkbox"/> Material Format |
| <input type="checkbox"/> Format - Coded |
| <input type="checkbox"/> Banner Code |
| <input type="checkbox"/> Order Number |
| <input type="checkbox"/> Book / Media |
| <input type="checkbox"/> Print / Online |
| <input type="checkbox"/> Onetime / Ongoing |
| <input type="checkbox"/> ACRL Expenditure category |

| Choose fields to add to report: |
|---|
| <input type="checkbox"/> Source |
| <input type="checkbox"/> Branch Name |
| <input checked="" type="checkbox"/> Title |
| <input type="checkbox"/> Vendor Name |
| <input type="checkbox"/> Vendor Name - Normalized |
| <input checked="" type="checkbox"/> Expended Amount |
| <input type="checkbox"/> Shelving Location |
| <input type="checkbox"/> Fund Code - Subject |
| <input type="checkbox"/> Fund Code - Format |
| <input type="checkbox"/> Material Format |
| <input type="checkbox"/> Format - Coded |
| <input checked="" type="checkbox"/> Banner Code |
| <input type="checkbox"/> Order Number |

| Filters | Columns |
|---------|-------------------|
| | Onetime / Ongoing |

| Rows | Values |
|-------------|--------|
| Banner Code | FY20 |
| Title | |

Pulled report in March. Need numbers as of June 30. Can use Title Holding Added Date to remove. (Will not be completely accurate if we have withdrawn titles since then. They won't show up here.)

Case #1: Collections Title Counts

| Library Collections | | Physical (A) | Digital/Electronic (B) |
|---------------------|---------------------------------------|---|--|
| 40 | Books [title count] | | |
| 40a | Books [volume count] | | |
| 41 | Databases | | |
| 42 | Media | | |
| 43 | Serials | | |
| 44 | Total | <i>calculated sum of 40 + 42 + 43</i> | <i>calculated sum of 40 + 41 + 42 + 43</i> |
| 45 | External Contributions from Consortia | 0 | \$84,154.00 |

Factors

1. Physical | Digital
2. Book | Database | Media | Serial

Subsets:

1. Book Volume Count

| Library of Congress | Library of Congress | Library of Congress | Material Format | Material Subformat | OCLC Number | Title | Title ISBN | Title ISSN | Title Holding Added Date |
|---------------------|---------------------|---------------------|-----------------|--------------------|-------------|--|------------|------------|--------------------------|
| G | G | G1200 | MAPS | EMAPS | 79490768 | The national atlas of the United States | N/A | N/A | 3/7/2021 |
| R | RC | RC815.7 | JOURNALS/M | EJOURNALS | 54028162 | Esophagus. | N/A | N/A | 3/5/2021 |
| R | RD | RD731 | JOURNALS/M | EJOURNALS | 42787413 | Archives of orthopaedic and trauma surgery | N/A | N/A | 3/5/2021 |
| D | DL | DL65 | BOOKS | PRINTBOOK | 85822467 | The far traveler :voyages of a Viking v. 1 | 015101440X | N/A | 3/5/2021 |
| B | BR | BR1609.5 | BOOKS | PRINTBOOK | 31434395 | Christendom and its discontents :exiles, heretics, and the rise of the reformation | 0521471834 | N/A | 3/4/2021 |
| H | HQ | HQ1090.5.S6 | BOOKS | PRINTBOOK | 53144722 | Southern manhood :perspectives on race, class, and gender in the South | 082032423X | N/A | 3/4/2021 |
| U | UA | UA10.5 | JOURNALS/M | EJOURNALS | 58994717 | Democracy and security. | N/A | N/A | 2/27/2021 |
| D | D | D25.5 | JOURNALS/M | EJOURNALS | 67774934 | Journal of conflict archaeology. | N/A | N/A | 2/27/2021 |
| B | BF | BF724.3.A55 | BOOKS | EBOOKS | 227769548 | Working with anger and young people | 1846425387 | N/A | 2/23/2021 |
| T | TK | TK1 | JOURNALS/M | EJOURNALS | 233144664 | EC & M. | N/A | N/A | 2/19/2021 |
| I | IS | ISSN RECOF | JOURNALS/M | EJOURNALS | 61124197 | Journal of emerging technologies in computing and information science | N/A | N/A | 2/16/2021 |
| I | IS | ISSN RECOF | JOURNALS/M | EJOURNALS | 59807777 | Global refining & fuels report. | N/A | N/A | 2/16/2021 |
| B | BR | BR1 | JOURNALS/M | EJOURNALS | 54032275 | The Bibliotheca sacra. | N/A | N/A | 2/16/2021 |
| I | IS | ISSN RECOF | JOURNALS/M | EJOURNALS | 71292399 | Global journal of international business and economics | N/A | N/A | 2/16/2021 |
| I | IS | ISSN RECOF | JOURNALS/M | EJOURNALS | 229452214 | The international journal of the academy of business and economics | N/A | N/A | 2/16/2021 |

Standard Report Pulled report in March. Need numbers as of June 30. Can use Title Holding Added Date to remove. (Will not be completely accurate if we have withdrawn titles since then. They won't show up here.)

| Row Labels | Count of Title | | Count of Title |
|------------------------------|----------------|-----------------------------|----------------|
| ARCHIVALMATERIALS | 160 | KITS | 66 |
| N/A | 160 | N/A | 66 |
| ARTICLES | 163 | MAPS | 2767 |
| ARTICLES,NONDIGITAL | 163 | EMAPS | 282 |
| AUDIOBOOKS | 152 | N/A | 2485 |
| CASSETTE | 14 | MUSIC | 5177 |
| CD | 81 | CASSETTE | 9 |
| EAUDIOBOOK | 53 | CD | 4238 |
| N/A | 4 | EMUSIC | 865 |
| BOOKS | 461872 | LP | 64 |
| BOOKS:MICROFORM | 6415 | N/A | 1 |
| BRAILLE | 34 | MUSICAL SCORE | 8732 |
| CONTINUALLYUPDATEDRESOURCES | 65 | DOWNLOADABLEMUSICALSCORES | 7 |
| EBOOKS | 97098 | N/A | 8725 |
| LARGEPRINT | 97 | N/A | 346 |
| PRINTBOOK | 355629 | N/A | 346 |
| THESIS/DISSERTATIONS | 2534 | NEWSPAPERS | 533 |
| COMPUTERFILES | 179 | ENEWS PAPERS | 389 |
| N/A | 179 | N/A | 144 |
| GAMES(ALL) | 58 | OBJECTS | 18 |
| N/A | 58 | N/A | 18 |
| IMAGES | 143 | TOYS | 71 |
| N/A | 143 | N/A | 71 |
| INTERACTIVEMULTIMEDIA | 35 | VIDEOS | 1444 |
| N/A | 35 | BLU-RAY | 6 |
| INTERNETRESOURCES | 182 | DVDS | 1278 |
| WEBSITE | 182 | EVIDEOS | 81 |
| JOURNALS/MAGAZINES | 17893 | FILMS | 1 |
| EJOURNALS/EMAGAZINES | 13436 | N/A | 3 |
| N/A | 4457 | VHS | 75 |
| | | VISUALMATERIALS | 9 |
| | | DOWNLOADABLEVISUALMATERIALS | 8 |
| | | N/A | 1 |

PivotTable Fields

Material Format
 Material Subformat
 OCLC Number
 Title
 Title ISBN
 Title ISSN
 Title Holding Added Date

More Tables...

Drag fields between areas below:

| Filters | Columns |
|---------|---------|
| | |

| Rows | Values |
|--------------------|----------------|
| Material Format | Count of Title |
| Material Subformat | |

To determine book/media & online/print factors, you need both material format and material subformat.