



## South Central Library System

Helping Libraries Serve the Public

4610 South Biltmore Lane, Suite 101, Madison, WI 53718

TO: SCLS ILS Libraries

FROM: Heidi Oliverson, Amy Gannaway, Joanna Messer Jordan, Vicki Teal Lovely

RE: 2013 State Annual Report

DATE: 1/27/2014

This memo contains guidelines on how to use your annual Koha ILS reports to answer some of the questions in four portions of the State Annual Report:

- Section II Library Collection,
- Section III Library Services,
- Section XI Public Library Loans of Material to Nonresidents, and
- Section XII Technology.

We were able to pre-populate data/answers for some of the questions in the above Sections in your 2013 Public Library Annual Report. If the Section contains pre-populated data, the related section of this memo will indicate that Pre-Populated data is available. The codes used to provide data to pre-populate these answers are provided in the Appendix at the end of this memo **except** for the codes used to pre-populate Section XI. That information was sent out to each library in a separate spreadsheet. You can choose to use the pre-populated data or use the reports to tally your numbers and enter them yourself.

All of the Koha reports are posted on the [ILS Reports](#) web page; hyperlinks to individual reports are provided in this memo.

Definitions for most of the terms used in this memo are found in the DPI's Instructions for the Annual Report. (<http://pld.dpi.wi.gov/files/pld/pdf/annrptin.pdf>).

Additional assistance is also available on the SCLS 2013 Annual Report Information web page (<http://www.scls.info/management/annual/index.html>). If you need assistance or have any questions, please contact Denise Anton Wright at [dawright@scls.lib.wi.us](mailto:dawright@scls.lib.wi.us) or 608-246-7973.

## SECTION II: LIBRARY COLLECTION

### 1a. Books in Print: Number Owned/Leased

*Pre-populated data available.* Please see the codes used to pre-populate this field in the appendix at the end of this memo.

*Manual entry:*

- Use the report [Items Owned by Collection Code 2013](#). Add up the numbers in the **Items** column for your library's book Collection Codes.

### 1b. Books in Print: Number Added

*Pre-populated data available.* Please see the codes used to pre-populate this field in the appendix at the end of this memo. These numbers are based on a snapshot taken 1/1/2014, not based on monthly data.

*Manual entry:*

- Use the report [Items Added by Collection Code 2013](#). Add up the numbers in the **Items Added 2013** column for your library's book Collection Codes. These numbers are based on monthly data, adding together the twelve monthly reports posted on the ILS Reports Website. Some totals are slightly different from the pre-populated numbers.

### 3a. Audio Materials: Number Owned/Leased

*Pre-populated data available.* Please see the codes used to pre-populate this field in the appendix at the end of this memo.

*Manual entry:*

- Use the report [Items Owned by Collection Code 2013](#). Add up the numbers in the **Items** column for your library's audio Collection Codes (audiocassettes, CDs, PlayAways, etc.).

### 3b. Audio Materials: Number Added

*Pre-populated data available.* Please see the codes used to pre-populate this field in the appendix at the end of this memo. These numbers are based on a snapshot taken 1/1/2014, not based on monthly data.

*Manual entry:*

- Use the report [Items Added by Collection Code 2013](#). Add up the numbers in the **Items Added 2013** column for your library's audio Collection Codes (audiocassettes, CDs, PlayAways, etc.). These numbers are based on monthly data, adding together the twelve monthly reports posted on the ILS Reports Website. Some totals are slightly different from the pre-populated numbers.

### 5a. Video Materials: Number Owned/Leased

*Pre-populated data available.* Please see the codes used to pre-populate this field in the appendix at the end of this memo.

*Manual entry:*

- Use the report [Items Owned by Collection Code 2013](#). Add up the numbers in the **Items** column for your library's video Collection Codes (DVD, Blu-ray, VHS, etc.). These numbers are based on monthly data, adding together the twelve monthly reports posted on the ILS Reports Website. Some totals are slightly different from the pre-populated numbers.

### 5b. Video Materials: Number Added

*Pre-populated data available.* Please see the codes used to pre-populate this field in the appendix at the end of this memo. These numbers are based on a snapshot taken 1/1/2014, not based on monthly data.

*Manual entry:*

- Use the report [Items Added by Collection Code 2013](#). Add up the numbers in the **Items Added 2013** column for your library's video Collection Codes. (DVD, Blu-ray, VHS, etc.).

### 7. Other Materials Owned:

*Field not pre-populated.*

*Manual entry:* You may\* include any materials not already reported above. This might include toys, art prints, kits, computer software, video games, etc.

- Use the report [Items Owned by Collection Code 2013](#). Add up the numbers in the **Items Added 2013** column for the appropriate Collection Codes for your library. (**Note:** Items cataloged in generic records in LINKcat may be counted for this question. Do not count materials if they are not cataloged in LINKcat.)

\*You are not required to report **Other Materials Owned**, but if you do, you must also include a brief description of the types of material reported.

### 10. Subscriptions:

*Field not pre-populated.*

*Manual entry:*

Use the report [Total Serial Subscriptions 2013](#). Use the number from the **Bibs** column. This is the total number of print subscriptions currently received by your library that are entered in LINKcat using Periodicals, *including duplicates and clones*. If you added subscription records in 2013 for new subscriptions that will not be received until 2014, you need to subtract them from the number of subscriptions. This number also includes cloned serial records for 2014, as well as 2011, 2012, and 2013. **Subtract the number of these clones that your library receives, as well as new subscriptions for 2014 that were added in 2013, from your total.**

**Alternatively**, you can use the [List of Serial Titles report](#), which lists all current subscription *titles* that your library receives using Periodicals. This report lists out all of the cloned titles individually and includes the year. You may find it easier to total your subscription number by using this spreadsheet instead of the base number in Total Serial Subscriptions, especially if your library does not have duplicate subscriptions.

Clarification from DPI: “The federal definitions of “library collection” and “current print serial subscriptions” has no requirement that “items the library has acquired as part of the collection, whether purchased, leased, licensed, or donated as gifts” must be cataloged. The library wouldn’t count personal or staff subscriptions, but I’d say they can otherwise count uncataloged print serial subscriptions that are in their collection. (Don’t count electronic serial subscriptions, though.)”

### **SECTION III: LIBRARY SERVICES**

#### **1. Circulation Transactions:**

**1a. Total circulation** – Use the **Total CKO by ITYPE** or **Total CKO by Collection Code** report to answer 1a and 1b.

*Field not pre-populated.*

*Manual entry:* **REQUIRED STEPS**

1. Total your library’s numbers using one of the reports listed above.
2. Subtract ILL circulations:
  - Use your library’s [Total CKO by PSTAT 2013](#) report and find the values for the following PSTATs (one or more may be zero): X-ILL, O-OS-I and Other System ILL TOTAL (for example O-WVLS-I). **revised 2/6/14.**
  - Add these three interlibrary loan PSTAT amounts together and save to use in Question 2a.
  - Subtract this interlibrary loan number from your **report** total.
3. Subtract Internals circulations:
  - Use your library’s [Total CKO by PSTAT 2013](#) report and find the value for the X-INT PSTAT.
  - Subtract this number from the remainder amount and
4. Enter the result in 1a.

#### **1b. Children’s Materials:**

*Pre-populated data available.* **Collection codes** were used to pre-populate this field; see the codes in the appendix at the end of this memo.

*Manual entry:*

- Using the [Total CKO by ITYPE 2013](#) or the [Total CKO by Collection Code 2013](#) report, add up the circulation numbers for Children’s (and YA) materials.
- Enter the total in 1b.

## **2. Interlibrary Loans**

### **2a. Items Loaned (Provided to):**

*Field not pre-populated.*

*Manual entry:*

Use the [Total Loaned and Borrowed 2013](#) (Stat Summary Annual) spreadsheet and find the SUBTOTAL in the "TOTAL LOANED" column for your library. This is the number of items you loaned to other LINKcat libraries.

The number of interlibrary loans you calculated by adding your X-ILL, O-OS-I, and OTHER-ILLs for Question 1a are the items you loaned to other (not LINKcat) libraries. Add this number to your TOTAL LOANED number to get the total for 2a.

### **2b. Items Received (Received from):**

*Field not pre-populated.*

*Manual entry:*

Use the [Total Loaned and Borrowed 2013](#) (Stat Summary Annual) spreadsheet and find the SUBTOTAL in the TOTAL BORROWED column for your library. This is the number of items you borrowed from other LINKcat libraries.

- Most of you also borrowed items from other (not LINKcat) libraries. If you circulated them to your patrons by creating records in LINKcat, they will be found in your [Total CKO by Coll Code 2013](#) report (IL code), or [Total CKO by ITYPE 2013](#) report (ILL7 or ILL14 codes). Which report you use (Collection code or ITYPE) will depend on how you circulate these interlibrary loan items at your library. If you don't use LINKcat to circulate these interlibrary loan items, you should have kept track of this number manually on paper. Once you have a total of these items from other libraries, add it to the number of your TOTAL BORROWED (from other LINKcat libraries) items. Record this total in 2b.

## **3. Number of Registered Borrowers**

### **3a. Resident.**

*Pre-populated data available.* Counted patrons using the PSTAT(s) associated with your municipality. If you count the population of another municipality as residents, you will have to add them manually to the pre-populated number.

*Manual entry:*

- Use the report [Registered-Borrowers-by-PSTAT-2014](#).
- Go to the row for your municipality's PSTAT.
- The number in the LINKcat column is your total of registered Resident borrowers.
  - Libraries that count multiple municipalities or PSTATs will have to add the numbers together for their total.

### 3b. Nonresident.

*Pre-populated data available.* Counted patrons by (home) Library and broke that number down by PSTAT. This total includes every PSTAT **except** the PSTAT associated with your municipality. If you count another municipality as resident, you will have to subtract them manually from the pre-populated number to get an accurate count.

*Manual entry:*

- Use the report [Registered-Borrowers-by-PSTAT-2014](#).
- Go to the Column for your library and write down the Total for that column.
- Using the same column, write down the number in the row for your municipality's PSTAT.
- Subtract the number for the PSTAT from the Total – this is your count of registered Nonresident borrowers.

**3c. Add 3a and 3b for this Total. Do not use the numbers listed for the X-INT or X-ILL to answer this question.**

### 9. Number of public use computers:

*Field not pre-populated*

*Manual entry:*

In both 9a (total) and 9b (internet access) be sure to include all types of LINKcat workstations used by the general public in your library. Do NOT include LINKcat staff workstations.

## SECTION XI: PUBLIC LIBRARY LOANS OF MATERIAL TO NONRESIDENTS

*Pre-populated data available:* Counted circulation statistics based on the parameters list below for Manual entry. Each library

*Manual entry:*

- Use your library's [Total CKO by PSTAT 2013](#) report to answer the following questions. This report is divided into sections for each SCLS county, Out-of-System walk-in circulations and Outer Library loans (preceded by an O-) and Interlibrary Loan, Internal or Undetermined circulations (preceded by an X-). To find the numbers you need, access your library's report in the PSTAT folder and look for the appropriate subtotals and totals.

**1. Total Nonresident Circulation:** After you have answered questions 2-6, add the subtotals for each of these to arrive at the total for #1.

### 2. Circulation to nonresidents living in your county:

**2a. Those with a library:** Total the circulations for your county labeled "LIB" (for example, "SAUK-LIB"). From this number, subtract the number of circs for the PSTAT(s) assigned to YOUR municipality(s) (because those are circulations to Residents, not Nonresidents). Use the result for 2a.

**2b. Those without a library:** Locate the total for your county labeled "NO LIB," for example, "SAUK-NO LIB." Enter this number for 2b.

**2c. Home County Total:** add 2a and 2b.

**3. Circulation to nonresidents living in another county in your system:**

**3a. Those with a library:** Locate and add together the PSTAT totals that end in "LIB" for the 6 SCLS counties other than your own; for example, "Columbia County with LIB" plus the other "with LIB" county totals. *Because Adams and Portage are consolidated county libraries, everyone in those counties has a library.* Enter this total for 3a.

**3b. Those without a library:** Locate and add together the "NO LIB" totals for the other 4 SCLS counties (not including your county). Enter this total for 3b.

**3c. Other System Counties Total:** add 3a and 3b.

**4. Circulation to nonresidents in an adjacent county not in your system:** Locate the codes starting with "O-". These are circulations to patrons that live outside of our systems. For this question, **ONLY count the circulations in counties adjacent to your county but not in SCLS.** For example, Green County libraries would ONLY count the circulation transactions for patrons that lived in Iowa, Lafayette and Rock counties.

**4a. Those with a library:** Locate and add together the "LIB" subtotals in this section for ONLY the counties adjacent to your own county. Enter this total for 4a.

**4b. Those without a library:** Locate and add together the "NO LIB" subtotals in this section for ONLY the counties adjacent to your own county. Enter this total for 4b. [Save the breakdown of these numbers as you will use them when answering question 9.]

**4c. Nonsystem Adjacent County Total:** add 4a and 4b.

**5. Circulation to all other Wisconsin Residents:** Locate the codes starting with "O-" (except for O-OS) and add together all of the circulation transactions that were not used for questions 4a and 4b. Enter this total for #5.

**6. Circulation to persons from out of state:** Enter the number of circulations in the PSTAT labeled "O-OS". Do not include circulations for the "O-OS-I" PSTAT, those circulations are counted as ILL transactions.

**7. Method for determining circulation allocation:** Choose "Actual" from the dropdown.

**9. Circulations to non-residents in an adjacent county who do not have a local public library:**

*Manual entry only:* This is a breakdown, by county, of circulation transactions to nonresidents in ALL counties adjacent to your county that do not have a local public library (circulations you've already reported in questions 3b and 4b of this section).

## **SECTION XII: TECHNOLOGY**

**1. Internet Type:** see the **SCLS 2013 Annual Report Information, Section XII.**

**3. Use of Internet Filters:** Answer this question as appropriate for your library, but you should not choose "Yes, on all Internet workstations." The SCLS Network PCs are not filtered.

## APPENDIX

### Codes used to pre-populate the answer to Section II, Questions 1a and 1b:

BKAFI	BKANFAR	BKANFSR	BKJNFWL	PAAFI
BKAFICL	BKANFAU	BKANFTL	BKYFI	PAAFIFA
BKAFICN	BKANFBU	BKANFWL	BKYFICL	PAAFIMY
BKAFICR	BKANFBY	BKARN	BKYFICO	PAAFIRO
BKAFIFA	BKANFCK	BKJBG	BKYFICR	PAAFISF
BKAFIGN	BKANFCR	BKJFI	BKYFIFA	PAAFIWE
BKAFIHI	BKANFED	BKJFI14	BKYFIGN	PAANF
BKAFIHL	BKANFGN	BKJFIAW	BKYFIHI	PAJFI
BKAFIHO	BKANFHE	BKJFICO	BKYFIHO	PAJNF
BKAFIIN	BKANFHL	BKJFIFA	BKYFIMY	PAYFI
BKAFIMY	BKANFHM	BKJFIGN	BKYFIRO	PAYNF
BKAFIRO	BKANFHS	BKJFIMY	BKYFISF	PBJCN
BKAFISF	BKANFHT	BKJFISF	BKYNF	PBJFI
BKAFISL	BKANFJO	BKJFISP	BKYNFGN	PBJFIBB
BKAFISP	BKANFLM	BKJFIWL	BKYFICR	PBJFIWL
BKAFISU	BKANFMH	BKJHL	ERJFI	PBJHL
BKAFITH	BKANFPC	BKJNF	ERJNF	PBJNF
BKAFIWE	BKANFRE	BKJNF14	LPFI	SC
BKAFIWL	BKANFSC	BKJNFBY	LPFIMY	
BKAGE	BKANFSH	BKJNFGN	LPFIWE	
BKANF	BKANFSP	BKJNFSP	LPNF	

### Codes used to pre-populate the answers to Section II, Questions 3a and 3b:

BCDJ	CAJ	CDANF	CDJWL	DAPJ
BCJ	CAJMS	CDASP	CDY	DAPY
CAAFI	CAJWL	CDAWL	CDYMS	PH
CAAMS	CAY	CDJFI	DAPAFI	
CAANF	CDAFI	CDJMS	DAPANF	
CAAWL	CDAMS	CDJNF	DAPAWL	

### Codes used to pre-populate the answers to Section II, Questions 5a and 5b:

DBRAFE	DBRJ	DVDATV	DVDJWL	VRJ
DBRANF	DVDAFE	DVDAWL	DVDYFE	VRJWL
DBRARN	DVDANF	DVDJFE	VRA	VRY
DBRATV	DVDARN	DVDJNF	VRAWL	

### Codes used to pre-populate the answer to Section III, Questions 1b:

BKJ14	CDJBK	DVDJ	SOJ
BKJ28	CAJMS	KIT	TOY
CAJBK	CDJMS	MAJ	VRJ

IMPORTANT: Items with SCID collection codes are not counted in any library's collection count.