Pre-Populated Data and Instructions for Manual Calculation

This document contains information about the Koha ILS annual circulation and item report data that SCLS uses to pre-populate answers in:

- Section II Library Collection
- Section III Library Services and
- Section XI Public Library Loans of Material to Nonresidents

of your DPI Annual report. It provides instructions on how to calculate the answers for those fields you must manually calculate (and enter). And it also provides instructions for manually calculating the numbers that we pre-populate for you.

The codes used to provide the pre-populated data in Sections II and III are available in Appendix A of these instructions. The codes used to pre-populate Section XI are available from the **SCLS website** (Microsoft Excel spreadsheet).

Appendix B of these instructions provides information about libraries that have PSTAT codes in more than one county and SCLS communities that are in more than one county.

SECTION II: LIBRARY COLLECTION

1a. Books in Print: Number Owned/Leased: *data is pre-populated* (codes used are listed in Appendix A).
For manual calculation:
- Use the report **Items Owned by Collection Code 2016.** Add up the numbers in the **Items** column for your library's book Collection Codes.

1b. Books in Print: Number Added: *data is pre-populated* (codes used are listed in Appendix A).
For manual calculation:
- Use the report **Items Added by Collection Code 2016**. Add up the numbers in the **Items Added 2016** column for your library's book Collection Codes.

3a. Audio Materials: Number Owned/Leased: *data is pre-populated* (codes used are listed in Appendix A).
For manual calculation:
- Use the report **Items Owned by Collection Code 2016**. Add up the numbers in the **Items** column for your library's audio Collection Codes (audiocassettes CDs PlayAways etc.).

3b. Audio Materials: Number *data is pre-populated* (codes used are listed in Appendix A).
For manual calculation:
- Use the report **Items Added by Collection Code 2016**. Add up the numbers in the **Items Added 2016** column for your library's audio Collection Codes (audiocassettes CDs PlayAways etc.).

5a. Video Materials: Number Owned/Leased *data is pre-populated* (codes used are listed in Appendix A).
For manual calculation:
- Use the report **Items Owned by Collection Code 2016**. Add up the numbers in the **Items** column for your library's video Collection Codes (DVD Blu-ray VHS etc.).

5b. Video Materials: Number Added: *data is pre-populated* (codes used are listed in Appendix A).
For manual calculation:
- Use the report **Items Added by Collection Code 2016**. Add up the numbers in the **Items Added 2016** column for <u>your library's</u> video Collection Codes. (DVD Blu-ray VHS etc.).

7. Other Materials Owned: *This field **is not pre-populated***.
Manual calculation: 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 2016**. Add up the numbers in the **Items column for the appropriate Collection codes for your library**. (**Note:** Items cataloged in generic records in LINKcat may be counted for this question. <u>Do not count materials if they are not cataloged in LINKcat</u>.)

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: *This field **is not pre-populated***.
Manual calculation:
- Use the report **Total Serial Titles 2016**.
    - **Use the number from the Titles column.** The Titles number <u>does not include duplicate subscriptions for the same title</u>, and it <u>counts the annual and mid-year cloned titles only once</u>, so you do not need to subtract cloned titles.
        - NOTE: <u>Do not use the number from the Bibs column</u>. The Bibs number includes all annual and mid-year clones.
    - If you added new subscriptions in 2016 <u>for titles that will not be received until 2017</u>, **subtract them from the total**.
    - If your <u>library receives any duplicate subscriptions for the same title</u>, **add the additional subscriptions to the total.**

- *Alternatively* you can use the **List of Serial Titles 2016** report, which lists all bib records for the serials subscriptions that your library receives using Periodicals. This report includes each annual and mid-year cloned title for each year the title is cloned.

    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 uncatalogued 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: *This field **is not pre-populated***.
Manual calculation:
- Use the **Total CKO by Collection Code 2016** report. **To tally your library's numbers <u>only count data rows 2 through 174</u>**. *Rows after 175 are subtotals of the same numbers grouped in different ways: Dewey Decimal Classification (rows 176-185) and Generic collection categories (rows 187-204).*

THESE ARE REQUIRED STEPS
1. Total your library's numbers using the **Total CKO by Collection Code 2016**.
2. Subtract ILL circulations:
     o Use the **Total CKO by PSTAT 2016** report.
     o Find the column for your library and locate 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).
     o Add these three interlibrary loan PSTAT amounts together and save to use in Question 2a.
     o Subtract this interlibrary loan number from your **report** total.
3. Subtract Internal circulations:
     o Use the **Total CKO by PSTAT 2016** report.
     o Find the column for your library and locate the value for the X-INT PSTAT.
     o Subtract this number from the remainder amount and
4. Enter the result in 1a.

1b. Children's Materials: *data is pre-populated using **Item Types*** (codes used are listed in Appendix A).
For manual calculation:
- Use the **Total CKO by Item Type 2016** report.
  - Find the column for your library.
  - Add up the circulation numbers for Children's (and YA) materials.
  - Enter the total in 1b.

2. Interlibrary Loans
2a. Items Loaned (Provided to): *This field **is not pre-populated***.
Manual calculation:
- Use the **Total Loaned and Borrowed 2016** (Stat Summary Annual) spreadsheet.
- Find the column headed "LIB LOAN TO" where LIB equals your library's code.
  - o Scroll down the report to the row labeled SUBTOTAL in column A.
  - o 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 these "Other ILLs" to your TOTAL LOANED amount; enter the total in 2a.

2b. Items Received (Received from): *This field **is not pre-populated***.
Manual calculation:
- Use the **Total Loaned and Borrowed 2016** (Stat Summary Annual) spreadsheet.

- Find the column headed "LIB BORR FROM" where LIB equals your library's code
  - Scroll down the report to the row labeled SUBTOTAL in column A.
  - This is the number of items you borrowed from other LINKcat libraries.
- Many libraries also borrowed items from other non- LINKcat libraries.
  - If you circulated them to your patrons by creating records in LINKcat they will be found in your **Total CKO by Collection Code 2016** report (IL code).
  - If you don't use LINKcat to circulate these interlibrary loan items you should have kept track of this number manually on paper.
  - Add the total of manually tracked Items received from non-LINKcat libraries to the number of your "LIB BORR FROM" total (from other LINKcat libraries); enter the total in 2b.

3. Number of Registered Borrowers: Do not use the numbers listed for the X-INT or X-ILL to answer this question. X-UND numbers are counted as non-resident.

3a. Resident: data is pre-populated by counting patron records containing 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.
For manual calculation:
- Use the report **Registered borrowers by PSTAT 2016**.
- Go to the row(s) 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: data is pre-populated by counting patron records listing your Library as their "home" library (default pickup location) and subtracting the patron records that also have the PSTAT(s) 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.
For manual calculation:
- Use the report **Registered borrowers by PSTAT 2016**.
- 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. This number <u>will</u> include the X-UND numbers **do not use the numbers listed for the X-INT or X-ILL to answer this question.**

SECTION XI: PUBLIC LIBRARY LOANS OF MATERIAL TO NONRESIDENTS

Pre-populated data available for questions 2 through 6: Circulation statistics are pre-populated based on the parameters listed below for Manual calculation.

Manual calculation:
- Use your library's **Total CKO by PSTAT 2016** 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.

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 all residents of these libraries are considered to be with 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.

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.]

5. Circulation to all other State 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". <u>Do not include circulations for the "O-OS-I" PSTAT</u> those circulations are counted as ILL transactions.

9. Circulation to non-residents in an adjacent county who do not have a local public library:
*Manual calculation and 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 that were recorded in questions 3b and 4b of this section).

Section II Codes

Questions 1a and 1b. Books in Print.

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

Questions 3a and 3b. Audio materials.

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

Questions 5a and 5b. Video materials.

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

Question 7. Other materials.

AR	KTA	MPA	SOAWL	TY	SEEDS
EQ	KTJ	SOA	SOJ	VF	

Section III Codes

Question 1b. Circulation of children's materials

BKJ14	BKWIJ28	CAJMS	DVDJ	MAJ	VRJ
BKJ28	CAJBK	CDJMS	DVDWIJ	SOJ	
BKWIJ14	CDJBK	DAPJ	KIT	TOY	

APPENDIX B

Libraries and communities that have PSTAT codes in multiple counties.

- Belleville Public Library (Dane and Green Counties): D-BEL-VD; G-BEL-VG
- Brodhead Memorial Library (Green and Rock Counties): G-BROD-C; O-ALS-BRD-C
- Kilbourn Public Library Wisconsin Dells (Columbia Adams and Sauk Counties): A-WID-C; C-WD-CC; S-WD-CS
- Randolph Village (Columbia and Dodge Counties): C-RAN-VC; O-MWFLS-RANV
- Brooklyn Village (Dane and Green Counties): D-BRO-VD; G-BRO-VG
- Cambridge Village (Dane and Jefferson Counties): D-CAM-VD; O-MWFLS-CV
- City of Columbus: (Columbia and Dodge Counties): C-COL-C; O-MWFLS-COLC