

## State Survey: VERSO Reporting

*This document only addresses questions that require information from our online catalog (SWiftnet) for questions 2, 9, 11.1, and 11.2. Interlibrary loan questions 11.10 – 11.17 are addressed on a different document.*

### You will need:

- State Report from last year.
- Any handwritten or digital records you have been keeping (i.e. patron reference questions, patron computer usage, etc.).
- A folder on your computer to save the Excel reports, entitled: [This Year] State Report.

### How to View Reports:

- Staff Dashboard > Circ Reports > View Reports.
  - o When the report is complete, it will appear under the “File Name” column underlined in **BLUE**. Click on the report, and it will open in Excel.
  - o If you cannot locate the report once it is complete, check your computer’s “downloads” folder.
  - o To refresh the screen, click the black arrow on the far-right side and click the refresh button in the middle.
- Hints: Some reports will take longer to run than others. Speed is based on the amount of simultaneous VERSO traffic.



*Note: If you are unable to calculate a total (i.e. patron reference questions), you can provide an estimate.*

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| Check the calendar                                  | Staff Dashboard – Circ Admin – Circulation Parameters – Circulation Options: <ul style="list-style-type: none"><li>✓ 2<sup>nd</sup> line from the top = First Month of Fiscal Year for Reports.</li><li>✓ Current Value = 1, January</li></ul>   |
| Rows in gray on the State Survey:                   | These rows contain auto-filled information based upon your answers from the previous year’s State Report.  |
| 2.2a – Number of Registered Users                   | Go to Staff Dashboard > Statistics > Patron Statistics > Patron Categories <ul style="list-style-type: none"><li>● Choose the format you would like to view the report as. We recommend .pdf as it’s most printer-friendly, if you choose to print this information. Click the blue link that says “Run Statistics.”</li><li>● A downloaded document will appear at the bottom of the pop-up screen. Click that to view the document.</li><li>● The number you will need will be the bold number that says <b>Totals</b> at the end of the very last column.</li></ul> |
| 9.1b – (Print) Books Added During the Calendar Year | Staff Dashboard – Statistics – Circulation Statistics – Item Activity: <ul style="list-style-type: none"><li>● Run Statistics: By Year</li><li>● Report Format – View Report: PDF.</li><li>● Select last year.</li><li>● This report shows all of your material types and age groups. You will need to count the <b>books</b> only for this question.</li></ul>  |

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|   | Do <b>not</b> count brief bibs at the bottom of the page.   |
| 9.1c – (Print) Books Withdrawn During the Calendar Year             | Use the same report as in 9.1b above. “Withdrawn” = weeded, lost, and damaged items removed from the catalog.<br>Do <b>not</b> count brief bibs at the bottom of the page.  |
| 9.2 – Audio—Physical Units  | Staff Dashboard > Circ Reports > Run Reports > Item Reports > Location Holdings: <ul style="list-style-type: none"> <li>● Select Location: Choose your (entire) library.</li> <li>● Location: Permanent.</li> <li>● Material Type: Select the first audio material type in the drop-down menu. If you have multiple audio material types, such as audiobook player, cd audiobook, PlayAway, WonderBook, etc., these will also need to be counted. Reports for each material type will have to be run separately, and then add the total together.</li> <li>● Sort By: Your choice.</li> <li>● Start Title or Call Number: (leave blank).</li> <li>● End Title or Call Number: (leave blank).</li> <li>● Go to “view reports” and open the Excel spreadsheet. Scroll down and look through the report, taking note of column <b>L</b>; the material type will be the same in each row. Scroll all the way to find the last row, and subtract two. Reports for each material type will have to be run separately, and then add the total together.</li> </ul> |
| 9.3 – Video—Physical Units<br><br>“Video” = VHS, DVD, Blu-ray, etc. | Staff Dashboard > Circ Reports > Run Reports > Item Reports > Location Holdings: <ul style="list-style-type: none"> <li>● Select Location: Choose your (entire) library.</li> <li>● Location: Permanent.</li> <li>● Material Type: Select the first video material type in the drop-down menu.</li> <li>● Sort By: Your choice.</li> <li>● Start Title or Call Number: (leave blank).</li> <li>● End Title or Call Number: (leave blank).</li> <li>● Click Submit twice, and the report will run now.</li> <li>● Go to “view reports” and open the Excel spreadsheet. Scroll down and look through the report, taking note of column <b>L</b>; the material type will be the same in each row. Scroll all the way to find the last row, and subtract two. Repeat this report for each video material type, and add all of the totals together.</li> </ul>   |
| 9.4 – Number of all Other Materials                                 | <ul style="list-style-type: none"> <li>● Using the same report procedure as in 9.2, count the number of other material types in your library, such as cake pans, book club kits, video games, fishing rods, etc.</li> <li>● Reports for each material type will have to be run separately, and then add the total together.</li> </ul>  |
| 9.10 – Current Print Subscriptions                                  | Unlike the reports in 9.1 - 9.4, you do <b>not</b> need to calculate a total number of items. Instead, count only the number of <b>subscriptions</b> . If you keep paper records of your periodical circulation, refer to these.<br>Staff Dashboard > Circ Reports > Run Reports > Item Reports > Location Holdings: <ul style="list-style-type: none"> <li>● Select Location: Choose your (entire) library.</li> <li>● Location: Permanent.</li> </ul>   |

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|  | <ul style="list-style-type: none"> <li>● Material Type: Magazine or periodical, depending on the library. Reports for each material type will have to be run separately, and then add the total together.</li> <li>● Sort By: Title.</li> <li>● Start Title or Call Number: (leave blank).</li> <li>● End Title or Call Number: (leave blank).</li> <li>● Click Submit twice, and the report will run now.</li> </ul> <p>Hint: When the Excel spreadsheet opens, it will display all of the items with subscriptions (i.e. <i>Time</i>, <i>Pioneer Woman</i>, <i>National Geographic</i>, etc.). Each different subscription title will be grouped together. Count each <b><u>subscription</u></b> title to obtain a total. Do <b>not</b> count the total number of items.</p>   |
| 11.1 – Circulation of Adult Materials      | <p>Count <b><u>only</u></b> “checkout” and “renewal” numbers.<br/> Staff Dashboard &gt; Statistics &gt; Circulation Statistics &gt; Item Location Detail:</p> <p>*You only need to be concerned with the columns that say “Check-out and Renewal” and <b><i>if applicable</i></b>, “In-House Total.” Add all of the circulation numbers of materials <b><u>intended for</u></b> patrons 18+.</p> <p><u>Option 1: Count by hand</u></p> <ul style="list-style-type: none"> <li>● Select your library.</li> <li>● Run Statistics: By Year</li> <li>● View Report: PDF</li> <li>● Select a Date: Last Year</li> </ul> <p><u>Option 2: Count using Microsoft Excel</u></p> <ul style="list-style-type: none"> <li>● Select your library.</li> <li>● Run Statistics: By Year</li> <li>● View Report: Excel</li> <li>● Select a Date: Last Year</li> <li>● If you are a proficient Excel user, you can customize this spreadsheet a great deal. Ask Sara or Chris for assistance.</li> </ul> |
| 11.2 – Circulation of Children’s Materials | <p>Calculate the circulation of materials <b><u>intended for</u></b> patrons 18 or younger. Use the same report as in 11.1, counting only “checkout and renewal” numbers.</p>  |