2021 State Survey: ILL Reporting

Updated 01/12/2022

This document only addresses interlibrary loan questions 11.10 – 11.17. VERSO questions are addressed on a different document.

You will need:

→ State Report from 2020
→ Any handwritten or digital records you have been keeping (i.e. ILL Tracker document).
→ A folder on your computer to save the Excel reports, entitled: 2021 State Report.

Notes:

- Note: If you are unable to calculate a total (i.e. patron reference questions), you can provide an estimate.
- If you need help with Excel, feel free to contact Kelly or Jody.
- Bulk loans will **not** be reported. However, you can mention bulk loan activity in the "Public Note" pop-up window. That is, you can click the little notepad icon next to the question, and type in the space provided.
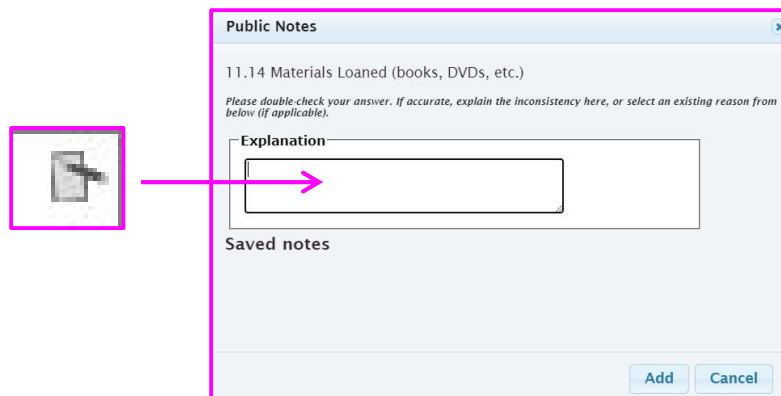
- "Returnables" = Loans which must be returned to the lender (i.e. books, kits, magazines, etc.).
- "Non-returnables" = Scans or copies which are not returned to the lender (i.e. journal articles).
- "Borrowing unfilled" = Requests your library placed that could not be fulfilled by SHAREit lenders **and** OCLC lenders.
- "Lending unfilled" = Requests your library labeled "will not supply" in SHAREit.
- Requests for multiple copies of a single title for book clubs should be counted per request, **not** per item. If you order a multi-copy set from a single library, this is considered a single transaction.

Using the directions below, complete this table:

Borrowing Totals = SHAREit + OCLC				Lending = SHAREit	
11.10	SHAREit	OCLC		11.14	
11.11	SHAREit	OCLC		11.15	
11.13	SHAREit	OCLC		11.17	

Calculations

11.10 - 11.13: Borrowing Requests

1. Log in to the library's SHAREit account.
2. Staff Dashboard – Statistics Tab – Activity and Request Reports.
3. Customize the report:
   a. Date range = 01/01/2021, 12/31/2021. The dates can be manually typed, or you can select them by clicking on the blue button with the white triangle.
   b. Select Format: Excel
   c. Select Report Type:
      ✓ Borrowing Activity
      ✓ Lender Activity
   d. Select Libraries: A blue circle will appear next to the top line, which will auto-populate with your library's name.
   e. Display each site even if statistics are zero? YES
   f. Submit. There will be a short lag while the report runs.
4. The report will download. If you do not see the report, check your computer's "downloads" folder for an Excel worksheet entitled "MultiReport". You will use this report to complete questions 11.10 – 11.17.
   a. Open the spreadsheet; it will contain one tab for borrowing, and another for lending.
   b. Click "enable editing" in the top highlighted bar.
5. Borrowing Activity Tab:
   a. Delete rows 1-3. A blue row is at the top, followed by your library's statistics, as well as other libraries stats. Highlight and delete these to avoid confusion. Now, you should only see your library's activity.
   b. Copy these numbers onto the blue section of the table above:
      i. Filled (column D, row 2) = 11.10
      ii. 11.11 will most likely be zero, unless you have made a request for a journal article through OCLC. Refer to your records to obtain this number, or ask Kelly for help.
      iii. 11.12 is automatically calculated by the survey.
      iv. Unfilled (column E, row 2) = 11.13
7. Locate your library's OCLC ILL records and add these numbers to the blue table above, add them to the SHAREit numbers, and calculate your totals, which are transferred to the corresponding questions on the survey.

11.14– 11.17: Lending Requests

1. SWKLS members are not OCLC lenders; we only borrow.
2. Using the same spreadsheet as in Step 4a above, click on the Lending Activity Tab, and:
   c. Delete rows 1-3. A blue row is at the top, followed by your library's statistics, as well as other libraries stats. Highlight and delete these to avoid confusion. Now, you should only see your library's activity.
   d. Copy these numbers onto the blue section of the table above:
      i. Filled (column D, row 2) = 11.14
      ii. 11.15 will most likely be zero, unless you have sent a journal article to another library. Refer to your records to obtain this number, or ask Kelly for help.
      iii. 11.16 is automatically calculated by the survey.
      iv. Unfilled (column G, row 2) = 11.17
   e. Transfer these numbers to the corresponding questions on the survey.