

2021 State Survey: VERSO Reporting

Updated 01/12/2022

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 2020
- 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: 2021 State Report.

How to View Reports:

- Staff Dashboard – Circ Reports – View Reports.
 - 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.
 - If you cannot locate the report once it is complete, check your computer’s “downloads” folder.
 - 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.

Question	VERSO
Check the calendar	Staff Dashboard – Circ Admin – Circulation Parameters – Circulation Options: <ul style="list-style-type: none">✓ 2nd line from the top = First Month of Fiscal Year for Reports.✓ Current Value = 1, January Academic libraries have a different fiscal year than public libraries.
Rows in gray:	These rows contain auto-filled information based upon your answers from the 2020 State Report.
1.1 – 1.15	General information particular to your library.
C-1 – C-10 2.5c – 2.6	Information regarding special procedures during COVID.
2.2a – Number of Registered Users	Staff Dashboard – Circ Reports – Run Reports – Patron Reports – Patron Listing: <ul style="list-style-type: none">• Patron category: all.• Limit by Group: patron.• Select creation date.• Limit by: (leave these dates blank).• Order by: patron category.• Include password column: (leave box empty).• Click submit twice, and the report will run now. Hint: When the Excel spreadsheet opens, the patron list begins in row seven. Scroll all the way down to find the last row. Subtract seven to calculate a total number of patrons.

9.1a – Books Owned at the Beginning of 2021	This answer is prefilled with information from last year’s State Report question 9.1d.
9.1b – (Print) Books Added During the Calendar Year	<p>Staff Dashboard – Circ Reports – Run Reports – Item Reports – New Item Activity:</p> <ul style="list-style-type: none"> Choose the location to calculate the number of books purchased. If your books are spread out in different locations, you will have to run this report for each location, and add all of the subtotals together to calculate a total. This includes regular print and large print in all age groups. Sort by: Choose the option you prefer. Enter Start Date: 01/01/2021. Enter Stop Date: 12/31/2021. Click submit twice, and the report will run now. <p>Hint: When the Excel spreadsheet opens, note that titles begin after row two. Scroll all the way down to find the last row. Take this subtotal and subtract two to calculate a total.</p>
9.1c – (Print) Books Withdrawn During the Calendar Year “Withdrawn” = weeded, lost, and damaged items removed from the catalog.	<p>Staff Dashboard – Statistics – Circulation Statistics – Item Activity:</p> <ul style="list-style-type: none"> Ensure your library is selected. Run Statistics: By Year Report Format – View Report: PDF. Select a Date: 2021 <p>Hint: When the .pdf opens, you will notice results for the whole system are included. Scroll to your library, and find the section labeled “regular bib items” and the “deleted” column. Copy these totals. Do <u>not</u> count “brief bib items”, “ILL items”, or “acquisitions-bib items”.</p>
9.2 – Audio—Physical Units	<p>Staff Dashboard – Circ Reports – Run Reports – Item Reports – Location Holdings:</p> <ul style="list-style-type: none"> Select Location: Choose your (entire) library. Location: Permanent. 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 the totals added together. Sort By: Your choice. Start Title or Call Number: (leave blank). End Title or Call Number: (leave blank). Click Submit twice, and the report will run now. <p>Hint: When the Excel spreadsheet opens, it will display all of the items for the audio material type. Scroll down and look through the report, taking note of column L; 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 audio material type, and add all of the totals together.</p>
9.3 – Video—Physical Units “Video” = VHS, DVD, Blu-ray, etc.	<p>Staff Dashboard – Circ Reports – Run Reports – Item Reports – Location Holdings:</p> <ul style="list-style-type: none"> Select Location: Choose your (entire) library. Location: Permanent. Material Type: Select the first video material type in the drop-down menu. Sort By: Your choice.

	<ul style="list-style-type: none"> • Start Title or Call Number: (leave blank). • End Title or Call Number: (leave blank). • Click Submit twice, and the report will run now. <p>Hint: When the Excel spreadsheet opens, it will display all of the items for the video material type. Scroll down and look through the report, taking note of column L; 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.</p>
9.4 – Number of all Other Materials	Using the same report procedure in 9.2, count number of other material types in your library, such as cake pans, book club kits, video games, fishing rods, etc. Refer to the report you ran for answer 8.6. Run reports for each of these material types, and add all subtotals together to calculate a total.
9.10 – Current Print Subscriptions	<p>Unlike the reports in 9.1 - 9.4, you do <u>not</u> need to calculate a total number of items. Instead, count only the number of <u>subscriptions</u>.</p> <p>Staff Dashboard – Circ Reports – Run Reports – Item Reports – Location Holdings:</p> <ul style="list-style-type: none"> • Select Location: Choose your (entire) library. • Location: Permanent. • Material Type: Magazine or periodical, depending on the library. If your library also has newspapers, yearbooks, etc., those reports will have to be run separately. • Sort By: Title. • Start Title or Call Number: (leave blank). • End Title or Call Number: (leave blank). • Click Submit twice, and the report will run now. <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 subscription title to obtain a total. Do <u>not</u> count the total number of items.</p>
11.1 – Circulation of Adult Materials	<p>Count only “checkout” and “renewal” numbers. Do <u>not</u> count “checkin” or “shelved”.</p> <p>Staff Dashboard – Statistics – Circulation Statistics – Item Location Detail:</p> <p><u>Option 1: Count by hand</u></p> <ul style="list-style-type: none"> • Select your library. • Run Statistics: By Year • View Report: PDF • Select a Date: 2021 <ul style="list-style-type: none"> ▪ Hint: When the .pdf opens, all of your locations and circ activity will appear. Count all of your adult items in the first two columns: “checkout” and “renewal”. <p><u>Option 2: Count using Microsoft Excel</u></p> <ul style="list-style-type: none"> • Select your library. • Run Statistics: By Year • View Report: Excel • Select a Date: 2021 • If you are a proficient Excel user, you can customize this spreadsheet a great deal. Ask Kelly or Jody for assistance.
11.2 – Circulation of Children’s Materials	Calculate the circulation of materials <u>intended for</u> patrons 18 or younger. Count only “checkout” and “renewal” numbers. Do <u>not</u> count “checkin” or “shelved”. Use the same report as in 11.1.