How to use QuickDOC to prepare MAHSLIN ILL Reports

You can use the QuickDOC Reports (Version 2.1.1 and later) to prepare the annual MAHSLIN ILL Reports. The steps to accomplish this are as follows, using the Borrow side as an example (the examples are from 2002 and the numbers are fictional but the steps for reporting in the current year are the same):

1. Check that your Library records have appropriate Library Groups assigned.

    First print out the **Summary Borrow Report (by Library)**, and the **Summary Lend Report (by Library)** for the year to be reported. This step is to ensure that the proper Library Groups are assigned to the proper Libraries. Here is a typical first print:

A number of these Libraries haven't yet had Groups assigned. Although it's perfectly acceptable to leave some Libraries without a Group, if you want to track activity by Group then you should assign one Group to each Library. In the case above, for MAHSLIN Libraries, the unassigned libraries above should be either OUT (for outside of Region 8, no charge) or OUT$ (for outside of Region 8, charging).

For MAHSLIN Reports, all Libraries should have one of the following **Major Library Groups** (and only **one** Major Library Group, although any number of non-major groups can be added) assigned:

MA	- Mass Library, non-charging
MA$	- Mass Library, charging
R8	- Region 8 Library, outside Mass., non-charging
R8$	- Region 8 Library, outside Mass., charging
OUT	- Outside Region 8 Library, non-charging
OUT$	- Outside Region 8 Library, charging
COMML	- Commercial Vendors

As an acknowledgment to earlier record-keeping requirements, you might also continue assigning Major Library Groups R1 (Region 1 Library, non-charging, counted with the OUT Group); R1$ (Region 1 Library, charging, counted with the OUT$ Group); and NLM (NLM transactions, counted with OUT$). But for MAHSLIN ILL Reporting, these can just as easily go with the appropriate OUT Library Group.

Groups other than the MAHSLIN Major Groups. There are also any number of special groups that can be assigned to any library to indicate membership in a variety of mutual relationships and activities. But these should be additional to the Major Groups, not assigned on their own. Any number of special Library Groups can be added to any one Library, but you should add only one Major Library Group (a Group you wish to be discriminative in Group Reports) to any Library Record.

2. Check your Library Groups List for errors or duplication.

The third page of **Compute Totals** (in Borrow; it's the second page in Loan) shows the distribution of items by Library Group, by Delivery Method:

Library Group Report - By Del Method (Borrowing)

Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: Mail	PkUp	Other	(Mono/ A/V)	Web	Electronic Delivery: Ariel	Email	Fax	% Elect	Item Sent To: Library	Patron	Turnaround Avg # Days
OUT$	28	16.37%	18			(2)			7	3	36%	28		5.8
③ OUT														
CELLS	32	18.71%	23					1	3	5	28%	32		4.9
MA	59	34.50%	30						12	17	49%	59		2.3
R8$	24	14.04%	18						4	2	25%	24		6.3
R1$	19	11.11%	17			(1)			2		11%	19		7.9
R8	8	4.68%	7					1			13%	8		9.9
MA$	8	4.68%	8									8		8.8
BBLC	21	12.28%	8						9	4	62%	21		2.2
BBLFAX	15	8.77%	7							8	53%	15		.9
NLM														
R1	2	1.17%	2									2		9.5
MASSFAX	4	2.34%	1						2	1	75%	4		.3
Total in Groups:	220		139					2	39	40		220		
% of Groups Totals:			63.18%					0.91%	17.73%	18.18%				

Here's the Library Group Report - By Del Meth - before cleanup

Annotations in figure: "③ Bad group, can be deleted." / "Subgroup, can be ignored." / "These can be added to the OUT or OUT$ totals, to keep them separate."

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]
[The Group % Total column = that Group's share of the 171 items received during this period. Total percent may be > or < 100%]
[There were 170 Items not filled in-house (i.e., not by MAUBET). 22 of these were filled by Lenders with no assigned Library Group.]

These need to be checked in the Summary Borrow Report

This report can be used to determine which Groups might be deleted or amalgamated before assigning Groups and printing reports. Note also the note at the bottom that there were 22 items that were filled by Libraries with no Library Groups attached. These will need to be checked. Here is the same report, by Source, which appears at the bottom of the same page in Compute Totals:
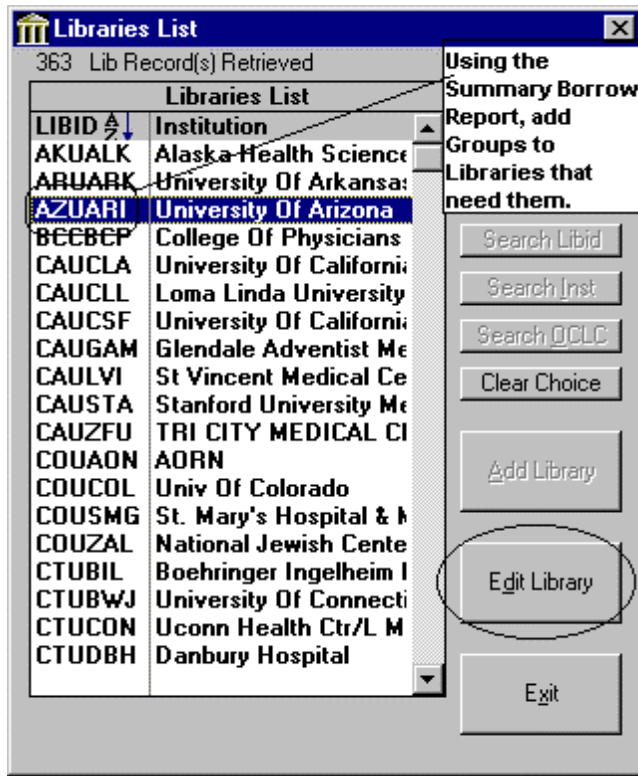
Library Group Report - By Source (Borrowing)

Library Group	TOTAL ITEMS	Source: DOCLINE	LDOC	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS	IFM	Other
OUT$	28	23	5							6		17
3												
OUT												
CELLS	32	30	2									
MA	59	56	3									
R8$	24	20	4							15		
R1$	19	19								16		
R8	8	8										
MA$	8	8								4		
BBLC	21	20	1									
BBLFAX	15	15										
NLM												
R1	2	2										
MASSFAX	4	3	1									
Total in Groups:	220	204	16							41		17
% of Groups Totals:		92.73%	7.27%							18.64%		7.73%

These groups, plus the 22 items with no Lib Group, add up to 170. Editing the Libraries with no Groups attached will even this out

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

3. <u>Edit Libraries to attach the appropriate Library Group(s)</u>.

Using the Summary Borrow Report printout, add Library Groups to Library Records that need them. From the Libraries List:

Libraries List

363 Lib Record(s) Retrieved

Using the Summary Borrow Report, add Groups to Libraries that need them.

Libraries List

LIBID	Institution
AKUALK	Alaska Health Science
ARUARK	University Of Arkansas
AZUARI	University Of Arizona
BCCBCP	College Of Physicians
CAUCLA	University Of California
CAUCLL	Loma Linda University
CAUCSF	University Of California
CAUGAM	Glendale Adventist Me
CAULVI	St Vincent Medical Ce
CAUSTA	Stanford University Me
CAUZFU	TRI CITY MEDICAL CI
COUAON	AORN
COUCOL	Univ Of Colorado
COUSMG	St. Mary's Hospital & F
COUZAL	National Jewish Cente
CTUBIL	Boehringer Ingelheim I
CTUBWJ	University Of Connecti
CTUCON	Uconn Health Ctr/L M
CTUDBH	Danbury Hospital

Search Libid
Search Inst
Search OCLC
Clear Choice
Add Library
Edit Library
Exit

Choose each Library in turn and click Edit Library to get to the Library Information Form. On the Library Information Form, click on the Misc Tab to make Library Group changes:
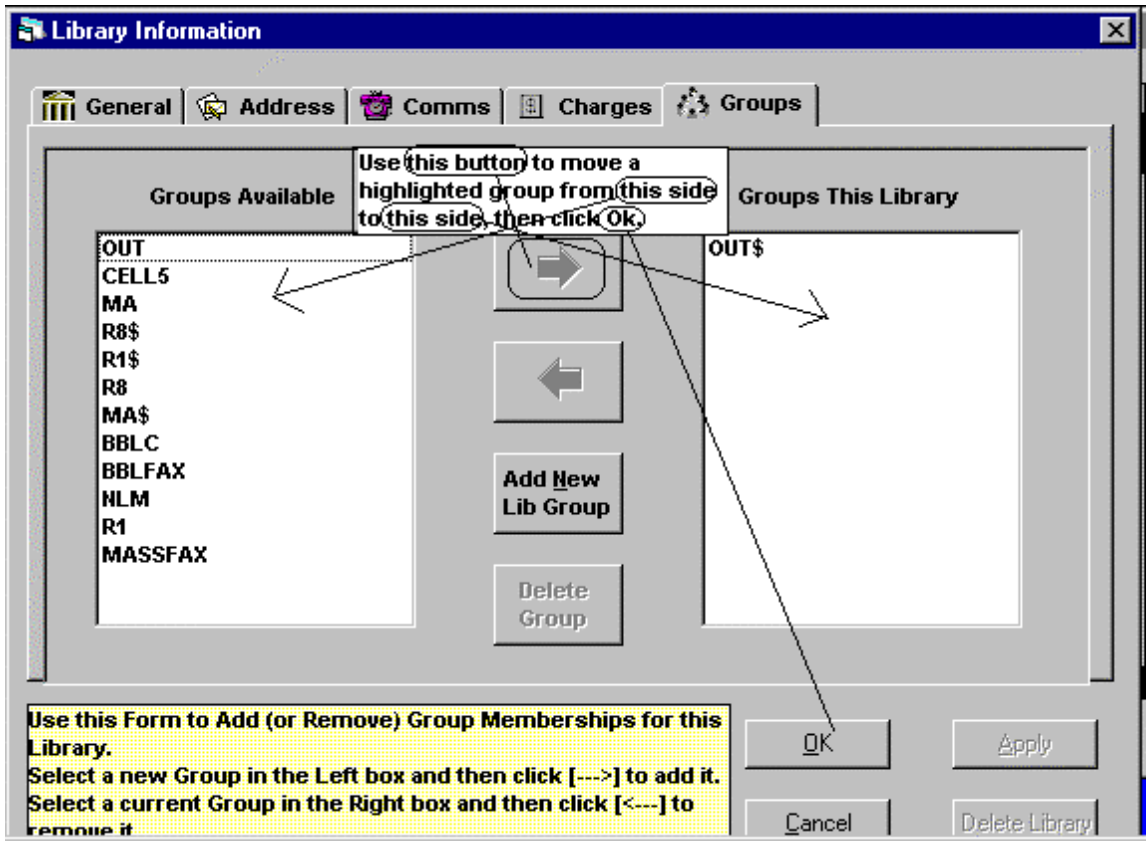
In the above example, the Library Group OUT$ has been moved from the Groups Available list to the Groups This Library list. Click Ok to save the change and return to the Libraries List, moving to the next Library that needs editing.

4. Reprint the Summary Report, if necessary, to double-check Groups.

   After using the Summary Borrow Report printout to add Groups to Libraries that need them, all libraries should have at least a Major Library Group.

Summary Borrow Report (by Library)
01-Jan-02 to 31-Dec-02

After revision, all the Libs have a Group assigned.

5-Mar-2003		Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)			Page 1
Library No.	Lender's LIBID		Items Borrowed	Charge	Lib #
1	AZUARI	University Of Arizona (OUT$)	1	$11.00	1
2	CAUCLA	University Of California, Los Angeles (OUT$)	1	$11.00	2
3	CAUCSF	University Of California San Francisco (OUT$)	1	$11.00	3
4	CAULVI	St Vincent Medical Center (OUT$)	1	$8.00	4
5	CTUCON	Uconn Health Ctr/L M Stowe Library (R8$)	9	$110.00	5
6	CTUHHH	Hartford Hospital (R8)	1	$0.00	6
7	CTUYAL	Yale University (R8$)	3	$33.00	7
8	FLUMIA	University Of Miami School Of Medicine (OUT$)	1	$11.00	8

4

Once we're sure that all libraries have at least one Major Group assigned, we can now print the Compute Totals Reports, for Lending and Borrowing, and use these to fill in the MAHSLIN ILL Report.

5. <u>Print Compute Totals for Lending and Borrowing</u>.

These printouts hold the information to be transferred to the MAHSLIN Form:

Compute Totals (Borrowing)
01-Jan-02 to 31-Dec-02

| 5-Mar-2003 | | | Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02) | | | | | | | | | | Page 1 |
Item Source	TOTAL ITEMS	Source % Total	Physical Delivery: (Mono/ Mail	PkUp	Other	A/V)	Web	Electronic Delivery: Ariel	Email	Fax	% Elect	Item Sent To: Library Patron	Turnaround Avg # Days
DOCLINE	154	90.06%	113			(3)		1	15	25	27%	154	5.7
LOANSOME DOC	16	9.36%	1						15		94%	16	1.9
DOCLINE & LD	170	99.42%	114			(3)		1	30	25		170	5.4
OCLC													
RLIN													
Mail													
Telephone													
Fax													
Other													
Copy Service	1	0.58%								1	100%	1	.

Monographs Borrowed are in this column, by Source.

[Totals below do not include Copy Service items.]

| TOTAL REC'D: | 170 | | 114 | | | | | 1 | 30 | 25 | | 170 | 5.4 |
| % of Totals: | | | 67.06% | | | | | 0.59% | 17.65% | 14.71% | | | |

This is the first page of the Compute Totals Report.

The Monograph Borrows are also shown here (3, under Mono/AV). Enter these on the appropriate line of the MAHSLIN Report Form.

MAHSLIN ILL STATISTICS 2005

Monographs filled in below

Items Borrowed	DOCLINE	OTHER	TOTAL	FILLED BY FAX	FILLED BY E-MAIL
MA - Free					
MA $					
REGION 8 (CT,RI, NH, VT, ME) - Free					
REGION 8 $					
OUTSIDE REGION 8 - Free					
OUTSIDE REGION 8 $					
COMMERCIAL VENDORS					
TOTAL BORROWED					
MONOGRAPHS BORROWED	3		3		

The third page of the Compute Totals Report has the rest of the information we need.

Library Group Report - By Del Method (Borrowing)

Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: (Mono/				Electronic Delivery:				%	Item Sent To:		Turnaround
			Mail	PkUp	Other	A/V)	Web	Ariel	Email	Fax	Elect	Library	Patron	Avg # Days
OUT$	40	23.53%	26			(2)			10	4	35%	40		6.6
OUT	6	3.53%	6										6	6.2
CELLS	32	18.82%	23				1		3	5	28%	32		4.9
MA	59	34.71%	30						12	17	49%	59		2.3
R8$	24	14.12%	18						4	2	25%	24		6.3
R1$	21	12.35%	17			(1)			3	1	19%	21		7.5
R8	8	4.71%	7					1			13%	8		9.9
MA$	8	4.71%	8										8	8.8
BBLC	21	12.35%	8						9	4	62%	21		2.2
BBLFAX	15	8.82%	7							8	53%	15		.9
NLM														
R1	4	2.35%	2						1	1	50%	4		5.
MASSFAX	4	2.35%	1						2	1	75%	4		.3
Total in Groups: 242			153					2	44	43		242		
% of Groups Totals:			63.22%					0.83%	18.18%	17.77%				

Groups-by Del Meth-after cleanup-retaining the R1 and NLM Groups, added to OUT

These major Groups add up to the 170 total, with the R1 and NLM items added to OUT for MAHSLIN purposes.

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]
[The Group % Total column = that Group's share of the 170 items received during this period. Total percent may be > or < 100%]
[There were 170 Items not filled in-house (i.e., not by MAUBET). 0 of these were filled by Lenders with no assigned Library Group.]

This is the Delivery Method breakout. I've continued to use the R1 and NLM Groups, but when entering data onto the form I'll gather these into the OUT and OUT$ totals.

To get the data necessary to fill out the rest of the form we also need the bottom of the third page, which is the breakout by source:

Library Group Report - By Source (Borrowing)

Library Group	TOTAL ITEMS	Source: DOCLINE	LDOC	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS	IFM	Other
OUT$	40	32	8							9		21
OUT	6	6										
CELLS	32	30	2									
MA	59	56	3									
R8$	24	20	4							15		
R1$	21	21								17		
R8	8	8										
MA$	8	8								4		
BBLC	21	20	1									
BBLFAX	15	15										
NLM												
R1	4	3	1									
MASSFAX	4	3	1									
Total in Groups: 242		222	20							45		21
% of Groups Totals:		91.74%	8.26%							18.60%		8.68%

These major Groups add up to the 170 total, with the R1 and NLM items added to OUT for MAHSLIN purposes.

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

Using both the Delivery Method and Source numbers, we can total up the first Group line, MA (which is Massachusetts non-Charging) as follows:

56 DOCLINE + 3 LDOC = 59 total for the DOCLINE column, with nothing for Phone or other. This comes from the Source spreadsheet. Use the Del Method

spreadsheet to get the Filled by Fax and Filled By Email columns, which are 17 and 12, respectively. For the Compute Totals shown above, then, the following MAHSLIN Report would result:

MAHSLIN ILL STATISTICS 2005

Monographs filled in below

Items Borrowed	DOCLINE	OTHER	TOTAL	FILLED BY FAX	FILLED BY E-MAIL
MA - Free	59		59	17	12
MA $	8		8		
REGION 8 (CT,RI, NH, VT, ME) - Free	8		8		
REGION 8 $	24		24	2	4
OUTSIDE REGION 8 - Free	10		10	1	1
OUTSIDE REGION 8 $	61		61	5	13
COMMERCIAL VENDORS					
TOTAL BORROWED	170		170	25	30
MONOGRAPHS BORROWED	3		3		

In this way the QuickDOC Reports can be used to fill out the MAHSLIN annual ILL report. We've just done Borrow here, but the Lend side follows a similar pattern.

2/2006