“You Could Look it Up!”
Using Millennium Statistics

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Problem with Stats

- “When I negotiated Bob Stanley’s contract with the Red Sox, we had statistics demonstrating he was the third-best pitcher in the league. They had a chart showing he was the sixty-sixth-best pitcher on the Red Sox!” - Agent Bob Woolf

- Create a stable and sustainable framework for keeping statistics.

Program Overview

- Statistics and Millennium
- Using Milstats
  - For Collection Totals
  - For Collection Assessment
  - For Future Expenses

Learning Outcomes or Takeaways

- No Record - No Data
- Stats are the Bread and Butter of III, but see above
- Trust your gut, see above
- Fastest Accumulation - What’s up with that (it does not repaint the screen)!

Statistics and Millennium

Four Major Types of Library Statistics
- Collection Assessment
- Materials Budget & Finance
- Productivity by Library Personnel
- Resource Use by Patrons
- Milstats can help with each…but differently!

Statistics and Millennium

- Statistics and Millennium
- Types of Reports
- Your Codes, Your Reports
- Accurate Stats – Recreate (records in the system)
Milstat Hints

- Use Fixed Fields for Stats when possible – Provides excellent consistency between reports
- Keep records clean -- remove blank or redundant codes (space or – for base value)
- Make sure the records are in the system?
- Consolidate the ‘silos’
- Include all resources you have or have access to (free internet journals)
- See what reports are easily available.
- See what reports are needed (they might be in conflict!)
- Rely on the system to serve as a central repository. Try to avoid spreadsheets on someone’s PC or hash marks.

Statistics and the ILS (Innovative)

- Problems? You are soaking in them!
- Our records are not tagged that way.
- What is a serial and what is a database?
- If the E-book is not in our catalog, do we just add 5000 in that column?

Statistics and Millennium

- Statistics are the bread and butter of INNOPAC/Millennium Systems.
- Milstats are available in all Millennium logins. Access is controlled by Login Manager & Authorizations.
- Milstats is an important element of system statistics, but not the only element.

Innovative System – Types of Reports

- What is driving the Statistics – Different Packages
  - Driven by Records (Milstats)
    - Can be rerun to reflect changes & new codes.
    - Also Vendor Stats work the same way.
    - No records…no stats! (Current Records ONLY)
  - Driven by Account Balances (Fund Reports)
    - Acquisition Financial Reports
    - Records are very important, but you can also adjust fund balances (cannot replicate between financial reports and Milstats)
    - Typically - two years of data (more if Method 3)

- Driven by Order Records (Milstats and Vendor Reports)
  - Ability to track vendor productivity
  - Ability to track payments by records*
  - Again…no records, no stats

- Driven by actual Circ Transactions
  - Items can be deleted, but stats still count
  - Circ Transactions kept for 37 months

- Driven by searches
  - OPAC Searching Report (10 days)

Statistics – Your Codes, Your Reports

- Stats are like ingredients…good ingredients lead to good dishes!
- Stats are only as useful/good as the coding.
- If the codes are bad, they are universally bad!
- INNOPAC/Millennium stats are driven by call numbers and fixed fields.
- You can rename and reuse most fixed fields to your needs.
- Statistics (from Milstats) are driven by records in the system. They can be run and run again and again and again....
Accurate Stats
Value of having the records in the system for generating stats:
1. Print Collection is still relevant!
2. That you can recreate the statistics if needed.
3. You can have consistent statistics for the following month, year, etc (compare apples to apples) – these can be scheduled
4. Allows greater confidence of your statistics.
5. Allows the generation of new reports more quickly.

Milstats - Types of Reports
• Gathering Records
  – Range of Records
  – Review File
  – Index
  – Advanced
• Types of Reports
  – Field Statistics Report
  – Periodic Report
  – Cross Tab Report

Milstats - Creating Reports
• Start with a Search/Results Name
• You can have many named “Unnamed”

Milstats - Gathering Records - Range of Records
• Traditional – As with Telnet Stats
• Saved queries can go to a specific record or the current last record.
• Reports can be for the records searched or linked record (all possibilities-and some-show)

Milstats - Gathering Records – Review File
• Traditional – As with Telnet Stats
• Limited to your largest available review file
• Allows you to create reports based on specific fixed fields or non-indexed variable length fields.
Milstats - Gathering Records – Index Search
• Milstat will automatically de-dupe records in reports (all reports)
• Counts of subject headings can provide an inflated count or impression of material on a subject – May capture records that do not really fit.
• Allows you to search for large subjects bigger that your largest review file.

Milstats - Gathering Records – Advanced
• Basically, the AKS Keyword search
• Can possibly end up with more records than is really documented by using too brief a term (art) – Uses AKS tools and search controls
• Sometimes difficult to have a set of records that you can consistently review
• Benefit by being able to use record sets that are greater than your largest review file.

Milstats - Types of Reports – Field Statistics
• Shows Fixed Fields and Call Number Statistics (see later section)
• Order Records can show financial data
• Get stats for the same or any attached records

Milstats - Types of Reports – Periodic Reports
• Periodic Reports can be tricky. Remember to choose the correct number of periods & Starting point. You can end up with blank reports.
• Choose right date field
• With order records – can produce Budget and Collection Development Reports (more later)

Milstats - Types of Reports – Field Statistics
• Choose “Limit the results by a time range” for the ability to look at two years of data at once. See following information on the Fiscal Year

Milstats - Types of Reports – Periodic Reports
• For Periodic Reports - You can use any date field. Remember that many records do not have a CDATE, ODATE or RDATE. Everything has a CREATED DATE
Milstats - Types of Reports – Periodic Reports
• Fiscal year Hints
• Setup via helpdesk - default is calendar
• Only month can be set (not date)
• Trust your gut - is it setup?
• Year chosen for FY is FIRST year:
  – FY July - June

Milstats - Types of Reports – Periodic Reports
• Fiscal year Hints (added after the session)
• Since only month can be set (not date), what does that mean if you close your books July 17th?
• Here are a few limits to these reports in Milstats:
  – Since it is month by month, everything in July would go to the same fiscal year.
  – One common trick when something has to be assigned the previous or next fiscal year is to use adjust fund balances - this will not show up in Milstats reports because these only look at the records, not the fund balances.
  – These types of reports seem to be better for “ballpark figures”, but not good for the granular data that you might need.

Milstats - Types of Reports – Cross Tab
• Allows you to look at fixed fields and SCAT tables.
• Very Useful for Accreditation Reports.
• Very Useful for looking at Patron Counts

Collection Assessment
• Accreditation
• Age of Collection Reports (Web)
• # of items (gov docs/serials/etc.)
• Call Number Management

Collection Assessment
• Different Records Produce Different Reports
  – Bib Records (titles)*
  – Order Records (purchasing history)*
  – Item Records (physical or electronic items in the collection)*
  – Checkin Records (subscriptions)*
• Millennium Statistics will easily allow you to create a report on one type of records using a range of another. (Bib report where the items have circulated more than three times).
Milstats - Types of Reports – Call Number

- Single point of access for books & other library material
- Reports you can do with extra Scat Tables (great for accreditation)
- Might be missing many items of relevance.
- Not all library material has a call number (media, periodicals, etc.) - Fund codes can help differentiate these items.
- Requires mediation from Library Staff (explain what the Call Numbers Really mean - Export into Excel or Word to supplement)

SCAT FILE MAINTENANCE (Art Accd. 8-2003)

<table>
<thead>
<tr>
<th>STARTING #</th>
<th>ENDING #</th>
<th>CATEGORY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 &gt; N</td>
<td>0001 N</td>
<td>0058.9999</td>
<td>Visual Arts</td>
</tr>
<tr>
<td>02 &gt; N</td>
<td>0061 N</td>
<td>0072.9999</td>
<td>Visual Arts - Theory</td>
</tr>
<tr>
<td>03 &gt; N</td>
<td>0091 N</td>
<td>0390.9999</td>
<td>Visual Arts - Study &amp; Teaching</td>
</tr>
<tr>
<td>04 &gt; N</td>
<td>0400 N</td>
<td>3990.9999</td>
<td>Visual Arts - Gallery Publications</td>
</tr>
<tr>
<td>05 &gt; N</td>
<td>4390 N</td>
<td>5069.9999</td>
<td>Visual Arts - Exhibitions</td>
</tr>
<tr>
<td>06 &gt; N</td>
<td>5199 N</td>
<td>5299.9999</td>
<td>Visual Arts - Private Collections</td>
</tr>
<tr>
<td>07 &gt; N</td>
<td>5300 N</td>
<td>7418.9999</td>
<td>Visual Arts - History</td>
</tr>
<tr>
<td>08 &gt; N</td>
<td>7420 N</td>
<td>7525.9999</td>
<td>Visual Arts - General Works</td>
</tr>
<tr>
<td>09 &gt; N</td>
<td>7560 N</td>
<td>8266.9999</td>
<td>Visual Arts - Special Subjects</td>
</tr>
<tr>
<td>10 &gt; N</td>
<td>8350 N</td>
<td>8356.9999</td>
<td>Visual Arts - Artists</td>
</tr>
<tr>
<td>11 &gt; N</td>
<td>8510 N</td>
<td>8553.9999</td>
<td>Visual Arts - Materials &amp; Studios</td>
</tr>
<tr>
<td>12 &gt; N</td>
<td>8554 N</td>
<td>8585.9999</td>
<td>Visual Arts - Conservation</td>
</tr>
</tbody>
</table>

University of Toledo – Art Accreditation – ITEM REPORT

Hint...remember to provide context. It is not always clear what the numbers mean. Use small words in case your library director wants to see them!

University of Toledo – Pharmacy -- ITEM REPORT

Delete unnecessary or unneeded information
Working with Columns & Rows (hiding)

- You can also hide columns and rows in the reports and save them on the system. Use the icons or right-click on the column to hide.
- The settings carry forward to the Export (so it will only send the columns that are not hidden).
- Unformat button will restore the screen to show all columns and rows.
- Settings will save on closing the report.

This report has just three columns - the ones that make the most sense for item reports. If I export from here - only these three columns (along with the code and meaning) are sent.

Right clicking on a row or column will allow you to hide it without the buttons on the top. The “Unhide all” option is the same as Unformat button on the top.

If you opt to unhide or unformat all, you get this confirmation box. Remember that the data remains in the system even if it is hidden.
Reports -- Projection Forward

- If you are looking at Order Records, you have options to create Budget and Collection Development Reports.
- These are great for projecting budgets and are easy to use.

Report looking at spending over two years (2002 and 2003)

This box allows you to add a column that is calculated from the actual values in the statistical report. You can change the column name and hit “Save” to apply.

Capturing Deleted Records

Basic Assumptions:
- System retains reports
- You can schedule reports to be run
- Saved reports use the full range
- If you get snapshots every month, you can see the records created and then figure out the ones deleted.
Capturing Deleted Records

- Milstats is record driven - No record, no count
- Milstats has a memory and can remember things
- Milstats can remember how it finds things and they can be scheduled
- It actually can do more than we think!

- Get total/summation reports every month or year.
- Leave these in the system
- Create new reports. Compare with what was created Last Year (second Report)
- These are snapshots at various times of the year.
- Make sure this is information that you need/want!

- Click View Query to see what you are searching.
- If this works, extract the query, save it and run the scheduled job.

- Hit the down arrow to copy the name.
- Once it is saved, you can schedule and run the query.
Capturing Deleted Records

• You are given the option of using the full range of records - critical for these types of searches - if you are using a range (all records)
• Schedule the query. You can do one at a time.

Statistics - Resources

• Innovative Interfaces (Milstats) - Resources
  – Users Manual - Page # 105586
  – Users Manual - Page # 105588
• (Creating and Editing Queries)
• IUG Presentations (including this one)
• Open Milstat and PLAY!!!!!!!

Questions?

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