Evergreen's Information for the State Report

(As of 2019)

If you are a public library, you fill out a report for the state library every year.[1] Here is a list of the information that Evergreen can provide:

Section 5 - Collection
- 5.1 Number of Children's/YA Print Materials
- 5.2 Number of Adult Print Materials
- 5.5 Audio Physical Units
- 5.7 Video Physical Units
- 5.9 Current Print Serial Subscriptions

Section 6 - Circulation
- 6.1 Children's/YA Circulation: (Print, Audio and video Phisical units)
- 6.4 Ault Circulation: Physical Materials (Print, Audio and video Physical units)

Section 7: Registered Users
- 7.1 Number of Registered Users:
- 7.2 Number of Registered Non-Resident Users

Here is how to get that information.

1. Run three reports

Run these three reports (all from "Reports/Shared Folders/Templates")	

1. From "Circulation" run "List of Circulations by Library and Patron"

	List of Circulations by Library and Patron	Displays checkout dates, circulating library, shelving location, Call Number and counts, patron, title, author. Filters on check out date (range), circulating library.	XUL	2018-07-17 19:13	balsamcentral

2. From "Collections" run "All Active Items"

	All Active Items	List of titles and items filtered by library. Displays Title, Author, Status, Bar Code, Call Number, Location, type, Audn, Is Deleted, Library, Record ID, Date 1, Form, Last Circ/Creation Date, Total Circ., Price	XUL	2018-07-13 13:54

3. From "Patron" run "Patron Information (with Unique Name Address)

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[1] https://www.maine.gov/msl/libs/statistics/annual/

☐	List Patrons with Outstanding Balances	Displays patron information with total of balance owed. Filtered by patrons home library.	XUL	2017-12-15 11:20
☑	Patron Information (with Unique Name Address)	Displays patron name, mailing information, creation, expiration date and Permission group. Filters by home library and only includes library cards that are currently active in the system.	XUL	2018-08-05 19:31

2. Get Information for "Section 5 – Collection"

You will need to answer these questions:

Section 5 - Collection

5.1 Number of Children's/YA Print Materials
5.2 Number of Adult Print Materials
5.5 Audio Physical Units
5.7 Video Physical Units
5.9 Current Print Serial Subscriptions

1. Run a pivot table on the collection report. (Rows = "Location"; Values="Count of Location").

2. Then break down each location into the appropriate category (e.g. Children's print, etc.)

		5.1	5.2	5.5	5.7	5.9
Row Labels	Count of Location	Children Print	Adult Print	Audio Physica	Video Physical	Print Serial Subscriptions
Adult Classics	207		207			
Adult DVD's	2129				2129	
Adult FANFIC	294		294			
Adult Fiction	4491		4491			
Adult Graphic Novelsl	20		20			
Adult Large Print	527		527			
Adult Non-Fiction	3734		3734			
Adult SCI FIC	107		107			
Audio	586			586		
Downstairs	399		399			
Info File	134					
Juvenile	5398	5398				
Juvenile DVD's	392				392	
Large Print	1		1			
Maine	1484		1484			
Music CD's	165		165			
New	55		55			
Periodicals	275					
Picture Books	2	2				
Reference	158		158			
VHS	193				193	
Young Adult	1000					
Grand Total	21826	5400	11715	586	2714	

Note: The Pivot table gave you the information on the left (in the blue box). You then entered information to the right – one column for each of the questions on the State Form. You then totaled each column to get the answers for each of the questions.

Note: In this example the 134 items in the "Info File", while cataloged, are not counted as materials for the state report.

3. Next, get the Number for question 5.9 Subscriptions.

3A. "Drill Down" on the line for Magazines/Periodicals (in this example, they are shown as Periodicals" (In this example, double-click on the number 275 next to Periodicals"

3.B. This results in a list of **every issue** of every periodical.

3.C Since we just want a count of the periodicals, run a pivot table on this table. Then set "Rows=Title"

3D. Then simply check the row number on the left. (subtracting for blank rows at the top)

3E. In this example, there are 48 rows, less 2 blank rows and one label row at the top. So there are 45 total subscriptions

3. Get Circulation Information

You need to answer these questions:

1. Run a pivot table on the circulation report

2. Then break down each row into either Children's or Adult

	6.1 Childrens	6.2 Adult
Row Labels ▾ Count of Location		
Adult Classics	53		53
Adult DVD's	5709		5,709
Adult Fiction	3276		3,276
Adult Large Print	186		186
Adult Non-Fiction	567		567
Audio	175		175
Juvenile	2676	2,676	
Juvenile DVD's	510	510	
Maine	624		624
Music CD's	16		16
New	158		158
Periodicals	446		446
VHS	11		11
Young Adult	312	312	
Grand Total	14811	3,498	11,221

As above, the pivot table generated the first two columns (in blue), and you made the entries in the two right columns. And you totaled.

4. Get Patron Information

Here you need to answer two questions:

Section 7: Registered Users

7.1 Number of Registered Users:

7.2 Number of Registered Non-Resident Users

1. Run a pivot table on the patron report.

2. Then break out the Non-Residents

Row Labels ▾	Count of Group Name	7.2 Non-Resident
Faculty\Teacher	1	
Institution	2	
Interlibrary Loan	1	
Local System Administrator	3	
Non-resident, Adult	131	131
Non-resident, Juvenile	10	10
Resident, Adult	2126	
Resident, Juvenile	269	
Student	6	
Grand Total	2553	141

Note: Since question 7.1 appears to only ask for the total of registered users, the total count (2,553) is all we need for question 7.1. We only had to calculate for question 7.2.