**LIT Annual Statistics – Fiscal Year End**

Each year, in early July we will refresh the training server with the full back up done at end of day, June 30th. This allows us to get numbers for the correct full fiscal year and not impact the production server. After the refresh, we

1. merge Lists to create a list to hold the items added that year
2. notify staff to NOT load records to the training server until we have completed running the item counts by location and format type.

Note: current fiscal year refers to the current fiscal year we are producing statistics for, not the fiscal year we are presently in.

**Prep**

**Before running any statistics, make the “personal manuscript” change (Dave).**

After refresh of the Training server implement a new item type so that annual stats can distinguish between Theses/dissertations and (other) Personal Manuscripts as required by CDL.

- Add new item type 30, "Personal Manuscript"

- Change name of item type 27 from "Personal Manuscript" to "Print thesis/dissertation"

- Run a create list and gather all items with iType 27.

-Change items with biblevel not = "t" from itype 27 to itype 30.

- Retain itype 27 in items with biblevel = "t".

**UCB Record Work**

**Print Records**

**Item counts by Location and Format Type (Jackie):**

Compare the tool tips table (/batchLoads/stats/scripts/tooltips.txt) to the Millennium location table and update if needed.

There is an additional sheet that has instructions for running the crosstab queries in Millennium, http://digitalassets.lib.berkeley.edu/annual\_statistics/documentation/Running\_crosstab\_queries\_for\_annual\_statistics.docx.

1. Run an Item Record crosstab report in Millennium Statistics against the full database by location and type (IType). Export the results as “Sheet1.xls”. Delete item type 23 (usually this is column “R” in the spreadsheet). Transfer this file over to vm161: /batchLoads/stats/data but first make sure the file from last year has been removed.
2. Run a create list of items suppressed or withdrawn (icode2 not equal to -) and not item type 23 (online resources) in the entire database. Run a crosstab report in Millennium Statistics by location and type (IType) against this new list. Export the results as “Sheet2.xls”. Transfer this file over to vm161: /batchLoads/stats/data but first make sure the file from last year has been removed.
3. Run a create list gathering item records with an item created date of the current fiscal year (e.g., July 1, 2015 – June 30, 2016) and not item type 23 (online resources). Run a crosstab report in Millennium Statistics against this set of records by location and type (IType). Export the results as “Sheet3.xls”. Transfer this file over to vm161: /batchLoads/stats/data but first make sure the file from last year has been removed.
4. Run a create list gathering item records that are suppressed or withdrawn (icode2 not equal to -) with an item created date of the current fiscal year and not item type 23 (online resources). Run a crosstab report in Millennium Statistics against this set of records by location and type (IType). Export the results as “Sheet4.xls”. Transfer this file over to vm161: /batchLoads/stats/data but first make sure the file from last year has been removed.
5. Run script to subtract the # 2 counts from the #1 counts. This will be the number we use total items. [vm161:/batchLoads/stats/scripts/allmillstats.pl]
6. Run script to subtract the #4 counts from #3 counts. This will be the number we use for items added this fiscal year. [vm161:/batchLoads/stats/scripts/fymillstats.pl]. The following line needs to be updated with the current fiscal year:

my $spreadsheet\_title = 'FY\_16\_17\_Items';

1. Run script to subtract #6 counts from #5 counts to give us two final crosstab reports to process as described below:
   1. Item totals for everything before the current fiscal year
   2. Item totals for everything added the current fiscal year

The script is vm161:/batchLoads/stats/scripts/before\_fy\_millstats.pl. The following lines need to be updated with the current year:

my $spreadsheet\_title = 'output\_before\_fy2017millstats';

my $allxlsfile = "/batchLoads/stats/out/All\_Items\_6-30-16\_20170718.xls";

my $fy\_file = "/batchLoads/stats/out/FY\_16\_17\_Items\_20170718.xls";

The output for each of these will be a crosstab report by Millennium locations and types which is not a one-to-one match with what has been requested (see <http://www.lib.berkeley.edu/Staff/CS/xls/ARL_UCOP_formulas_Under_Millennium.xls>)

For types, counts will be rolled up as shown in Appendix A: Type Mapping. Display the type in the left hand column with the counts.

For locations, counts will be rolled up based on the first 2 letters of the location code for UCB locations and the first 4 letters for NRLF locations, that is all locations starting with n. Display the 2 or 4 letter code with the counts.

8. Finally, the following files produced by the scripts will be posted to <http://digitalassets.lib.berkeley.edu/annual_statistics/July2017> (using 2016-7 as example):

All\_FY\_Items\_in\_Mill\_16-17.xls

All\_Items\_in\_Millennium\_as\_of\_06-30-17.xls

All\_Items\_in\_Millennium\_before\_fy\_6-30-17.xls

All three need to be ftp’d to vm137.lib.berkeley.edu/nfsDirs/data2/da/annual\_statistics/JulyYYYY (if the appropriate “JulyYYYY” has not yet been created, create a JulyYYYY” directory for this year’s stats.)

**Withdrawn counts (Dave)**

A number of create lists will be run to determine the withdrawn counts. See Appendix B: Withdrawn Create Lists. Millennium Statistics will be run against these lists to create crosstab by location and type.

Withdrawn in lieu of, and contributed to DSP will also get crosstab reports.

Blank label locs; output the INT NOTE only.

If possible, output will be processed by script written to roll up counts (see above).

**Circulation Statistics (Dave)**

Checkouts, Renewals, and Reserves counts will be created by running Millennium Web Management Reports. Patrons will be as what shows in Appendix D: Patron Types.

Original output from Millennium will be saved as original input in the directory.

Additional crosstab reports requiring post processing. Create two Excel sheets reporting circulations by patron type and location, one excluding reserves (circ\_rollup\_onlyres.pl), the other only reserves (circ\_rollup\_nores.pl). Millennium cannot mix record types in the statistics module. So in order to get patron type/location as the axis for the crosstab, a web management report needs to be generated using user specified date, patron type and location (See appendix E). The two scripts require location codes, web reports only provides the location “meaning.” The location codes are added by importing the report into an Access database (annual\_circ.accdb) and running a query joining a location table with the report table on the “meaning” (location description). The table then needs to be de-duped. That table is output as an Excel spreadsheet and the two scripts are run against it for the final crosstab reports. (**Note**: the “Loc\_Code” and “Location” field need to have their names changed to “Code” and “Meaning” for the scripts.)

Please see Appendix F for how patrons are rolled up for final report and Appendix G for location report.

**In House Statistics (Dave)**

Gather raw stats from Web Management Reports. Roll up the sub locations into the base locations using queries in the Access database located in O:\My Documents\ILS\Statistics\AnnualStats\_FY1\_FY2\InHouse directory.

**Total number of bib records, by location.**

Run statistics against the bib file and export a report based on location. Save file in directory..

**Electronic Records**

**Online Resources--E-Resources (Eileen)**

A number of create lists will be run to determine the online resources counts. See Appendix C: Online Resources Counts. These numbers are not grouped by location.

**Digital Collections statistics (Giulia)**

Not part of Millennium stats, mentioned because we don’t what it forgotten.

**Patron Records**

**Percentage of UCB patrons no-circ (Dave)**

Gather two lists, one of all current UCB patrons. Run the second list against the first gathering all records for patrons that have never checked out a book.

1st list-- all patrons with Patron Code1 = “0” (UC Berkeley) and an expiration date greater than or equal to today.

2nd list-- run against first list, and gather all the records for those patrons that had Total Checkouts = 0. Calculate percentage between two.

Put result in: https://preservationassets.berkeley.edu/annual\_statistics/percent\_circ/

**NRLF Record Work (Dave)**

**NRLF cumulative deposit statistics**

Using the largest of the reconfigured review files available on the training server, gather all unsuppressed items that have a location that begin with “n”. Depending on the size of the review file, this process will have to be repeated several times, it will take at least 2 queries; each new query will need to start with the item number following the last item number in the current list.

As each query ends, it should be exported to a local directory using the saved export, “LSO\_NRLF\_monthly\_deposit\_export\_sydr”.

Further processing of the exports will be done after the FY deposits are gathered and output.

**NRLF FY deposit statistics**

Using a large file on the training server, gather all unsuppressed records with locations that start with “n” and have MARC Tag 989|a between "[*beginning date of the fiscal year*]"and "[*end date of the fiscal year*]" (example: MARC Tag 989|a between "20170701"and "20180630").

Export the results to a local directory using the saved export, “LSO\_NRLF\_monthly\_deposit\_export\_sydr”.

**Post-processing of NRLF statistics**

An Access database does the bulk of the post-processing of the NRLF exports from Millennium. The database contains stored queries and lookup tables for NRLF location translation and FFPK conversion. Detailed documentation can be found at: http://digitalassets.someurl.doc

**FFPK Keying errors**

We should probably ask Jutta if she wants this included in the annual stats for NRLF. And if so, what form. The program is set up to create a report and output a barcode list in the form needed to import back into Millennium.

Appendix A: Type Mapping

|  |  |
| --- | --- |
| **Types to report** | **Which ones to count** |
| 1. Volumes | 1 Monograph - regular loan + 2 Monograph - short-term loan + 20 Atlas + 87 Reserves 1 Week + 88 Reserves 1-day + 89 Reserves 1-day no renewal + 90 Reserves 2-hour + 91 Reserves 2-hour no renewal + 92 Reserves 2-hour no overnight + 93 Reserves 2-hr no renew/overnight + 35 Score + 36 Score (other load) |
| 2a.Serials received currently - purchased/2b.Serials received currently - not purchased | 10 Serial-Periodical (regular loan) + 11 Serial - Periodical (other loan) + 15 Newspaper |
| 3a. Personal manuscripts | 27 Personal Manuscript |
| 3b. UC archival manuscripts | 28 UC Archival Manuscript |
| 3c. Other archival materials | 29 Other Archival Material |
| 4. Maps | 19 Map + 70 Aerial Photograph |
| 5a. Microfilm reels | 44 Microfilm |
| 5b. Microcards | 43 Microcard |
| 5c. Microfiche | 42 Microfiche |
| 5d. Microprints | 45 Microprint |
| 6. Pamphlets | 26 Pamphlet |
| 7. Government documents | n/a |
| 8a. Audiodiscs | 51 Phonograph Record/Audio disc LP |
| 8b. Audiocasettes | 53 Audio Cassette |
| 8c. Audioreels | 54 Audio Reel |
| 8d. Compact discs, digital audio | 52 Compact Disc + 55 Sound Recording, MP3, Undefined |
| 9a. Videotapes | 63 Videotape |
| 9b. Videodiscs | 62 Videodisc |
| 9c. Mult-media kits | 82 Multi-Media Kit |
| 9d. Motion pictures | 64 Film |
| 10a. Filmstrips | 65 Filmstrip |
| 10b. Pictorial items | 67 Visual Material: pictorial |
| 10c. 35mm slides | 66 Slide |
| 11a. Computer tapes | 75 Computer File |
| 11b. Monographic CD-ROM discs | 4 Monograph CD-ROM disc |
| 11c. Serial CD-ROM discs | 14 Serial CD-ROM disc |
| 11d. Floppy disks | n/a |
|  |  |
| **We will provide counts for the following even though they are not on the official list:** | |
| 23 Online Resources |  |
| 68 Visual Material: non-pictorial |  |
| 69 Visual Format Undefined |  |
| 76 Computer Hardware |  |
| 77 Media Equipment (audio/visual) |  |
| 78 iPad |  |
| 79 MacBook |  |
| 81 Kit |  |

Appendix B: Withdrawn Create Lists

**[Change fiscal year as appropriate]**

CUMULATIVE WITHDRAWALS

Save item records

item status = "w", OR

item location starts with "zw"

Fiscal Year WITHDRAWALS TOTAL

Search CUMULATIVE file

Save item records

item internal note starts with "201507", OR

item internal note starts with "201508", OR

item internal note starts with "201509", OR

item internal note starts with "20151", OR

item internal note starts with "2016"

A crosstab spreadsheet using Label Location and iType will be generated for items withdrawn during the fiscal year being counted.

WITHDRAWALS (IN LIEU of STORAGE)

Search Fiscal Year TOTAL

Save item records

item internal note contains "in lieu of storage"

A crosstab spreadsheet using Label Location and iType will be generated for items that were withdrawn in lieu of storage.

WITHDRAWALS (CONTRIBUTED TO DSP)

Search Fiscal Year TOTAL

Save item records

item internal note contains "contributed to DSP"

WITHDRAWALS (EXISTS IN DSP)

Search Fiscal Year TOTAL

Save item records

item internal note contains "exists in DSP"

The Label Locations and iType for items counted in “contributed to DSP” and “exists in DSP” will be exported and included in an email to Gail (or that person in charge of annual statistics).

WITHDRAWALS (FED DOCS)

Search Fiscal Year TOTAL

Save item records

item internal note contains "Fed Doc"

WITHDRAWALS (WEST Gold—pilot gap)

Search Fiscal Year TOTAL

Save item records

item internal note contains " contributed to RLF WEST Gold (De-Dup Pilot Gap Fill)"

WITHDRAWALS (WEST Gold—pilot dup)

Search Fiscal Year TOTAL

Save item records

item internal note contains " RLF WEST Gold (De-Dup Pilot Duplicate) "

A crosstab spreadsheet using Label Location and iType will be generated for items that were withdrawn for both Fed Docs project and WEST Gold lists.

REMAINING WITHDRAWALS

Fiscal Year TOTAL - (IN LIEU of STORAGE + CONTRIBUTED TO DSP + EXISTS IN DSP + FED DOCS) = REMAINING WITHDRAWALS

**Blank Location**

The Itype and Internal Note fields will be exported for all withdrawn items that are missing a Label Location.

Appendix C: Online Resources Counts

# Cumulative e-Resource Serials

BIBLIOGRAPHIC Bib Code 3 equal to "-" AND ITEM Location equal to "wb " AND (BIBLIOGRAPHIC Bib Level equal to "b" OR BIBLIOGRAPHIC Bib Level equal to "i" OR BIBLIOGRAPHIC Bib Level equal to "s") AND (BIBLIOGRAPHIC MARC Tag 85640 not equal to "" OR BIBLIOGRAPHIC MARC Tag 85641 not equal to "" OR BIBLIOGRAPHIC MARC Tag 85690 not equal to "" OR BIBLIOGRAPHIC MARC Tag 85691 not equal to "" OR BIBLIOGRAPHIC MARC Tag 9594 not equal to "")

# Cumulative e-Resource Serials, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 85640 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85641 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 9594 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85640 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85641 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 9594 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 8569 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 9599 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 8569 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 9599 has "Restricted to UC C"

# ARL prelim exclude from cumulative e-Resource serials, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 799 has "CRL Batch" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL Newsbank" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL LLMC"

# ARL secondary check on exclude from cumulative e-Resource serials, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 799 At Least one Field doesn't have "CRL " OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "" OR BIBLIOGRAPHIC MARC Tag 9599 not equal to ""

# ARL exclude from Cumulative e-Resource serials, paid minus above number

# Cumulative e-Resource Serials, free = (total) minus (paid)

# ARL exclude from Cumulative e-Resource serials, free

(from Cumulative e-Resource Serials file)

BIBLIOGRAPHIC MARC Tag 599 has "Hathi" OR BIBLIOGRAPHIC MARC Tag 856 has "Marcive" OR BIBLIOGRAPHIC MARC Tag 793 has "Open access resource; selected by the UC Libraries"

# FY e-Resource Serials (total)

(from Cumulatiave e-Resources Serial file, first collect items)

ITEM Created Date between "07-01-<last year>"and "06-30-<this year>"

(from the item file, then collect bibs and de-dupe)

# FY e-Resource Serials, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 85640 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85641 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 9594 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85640 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85641 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 9594 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 8569 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 9599 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 8569 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 9599 has "Restricted to UC C"

# ARL prelim exclude from FY e-Resource serials, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 799 has "CRL Batch" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL Newsbank" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL LLMC"

# ARL secondary check on exclude from FY e-Resource serials, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 799 At Least one Field doesn't have "CRL " OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "" OR BIBLIOGRAPHIC MARC Tag 9599 not equal to ""

# ARL exclude from FY e-Resource serials, paid minus above number

# FY e-Resource Serials, free = (total) minus (paid)

# ARL exclude from FY e-Resource serials, free

(from FY e-Resource Serials file)

BIBLIOGRAPHIC MARC Tag 599 has "Hathi" OR BIBLIOGRAPHIC MARC Tag 856 has "Marcive" OR BIBLIOGRAPHIC MARC Tag 793 has "Open access resource; selected by the UC Libraries"

# Cumulative e-Resource monographs (part 1 of 2) (because total is more than what will fit in one 3,000,000 record review file; entire process must be done twice)

Save bib records as “CUMULATIVE E-RESOURCE MONOGRAPHS part 1”

ITEM Location equal to "wb " AND (BIBLIOGRAPHIC Bib Level equal to "a" OR BIBLIOGRAPHIC Bib Level equal to "c" OR BIBLIOGRAPHIC Bib Level equal to "d" OR BIBLIOGRAPHIC Bib Level equal to "m" OR BIBLIOGRAPHIC Bib Level equal to "t") AND (BIBLIOGRAPHIC MARC Tag 85640 not equal to "" OR BIBLIOGRAPHIC MARC Tag 85641 not equal to "" OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "")

# Cumulative e-Resource monographs (part 1 of 2), paid

(from CUMULATIVE E\_RESOURCE MONOGRAPHS, pt 1)

BIBLIOGRAPHIC MARC Tag 85640 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85641 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85640 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85641 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85690 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 85691 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 85690 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 85691 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 959 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 959 has "Restricted to UC"

# ARL prelim exclude from cumulative e-Resource monographs, part 1, paid

BIBLIOGRAPHIC MARC Tag 799 has "CRL Batch" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL LLMC" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL Newsbank"

# ARL secondary check on exclude from cumulative e-Resource monographs, part 1, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 799 At Least one Field doesn't have "CRL " OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "" OR BIBLIOGRAPHIC MARC Tag 9599 not equal to ""

# ARL exclude from Cumulative e-Resource monographs, pt 1 paid minus above number

# Cumulative e-Resource Monographs, part 1, (total) minus (paid)

# ARL exclude from Cumulative e-Resource monographs, part 1, free

(from Cumulative e-Resource Monographs part 1 file)

BIBLIOGRAPHIC MARC Tag 599 has "Hathi" OR BIBLIOGRAPHIC MARC Tag 856 has "Marcive" OR BIBLIOGRAPHIC MARC Tag 793 has "Open access resource; selected by the UC Libraries" OR BIBLIOGRAPHIC MARC Tag 799 has "US Office of Scientific and Technical Information"

# Cumulative e-Resource monographs (part 2 of 2)

Save bib records as “CUMULATIVE E-RESOURCE MONOGRAPHS part 2”

ITEM Location equal to "wb " AND (BIBLIOGRAPHIC Bib Level equal to "a" OR BIBLIOGRAPHIC Bib Level equal to "c" OR BIBLIOGRAPHIC Bib Level equal to "d" OR BIBLIOGRAPHIC Bib Level equal to "m" OR BIBLIOGRAPHIC Bib Level equal to "t") AND (BIBLIOGRAPHIC MARC Tag 85640 not equal to "" OR BIBLIOGRAPHIC MARC Tag 85641 not equal to "" OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "")

# Cumulative e-Resource monographs (part 2 of 2), paid

(from CUMULATIVE E\_RESOURCE MONOGRAPHS, part 2)

BIBLIOGRAPHIC MARC Tag 85640 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85641 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85640 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85641 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85690 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 85691 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 85690 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 85691 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 959 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 959 has "Restricted to UC"

# ARL prelim exclude from cumulative e-Resource monographs, part 2, paid

(from CUMULATIVE E\_RESOURCE MONOGRAPHS, part 2, paid)

BIBLIOGRAPHIC MARC Tag 799 has "CRL Batch" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL LLMC" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL Newsbank"

# ARL secondary check on exclude from cumulative e-Resource monographs, part 2, paid

(run query using above file)

BIBLIOGRAPHIC MARC Tag 799 At Least one Field doesn't have "CRL " OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "" OR BIBLIOGRAPHIC MARC Tag 9599 not equal to ""

# ARL exclude from Cumulative e-Resource monographs, pt 2 paid minus above number

# Cumulative e-Resource Monographs, part 2 (total) minus (paid) free

# ARL exclude from Cumulative e-Resource monographs, part 2, free

(from Cumulative e-Resource Monographs part 2 file)

BIBLIOGRAPHIC MARC Tag 599 has "Hathi" OR BIBLIOGRAPHIC MARC Tag 856 has "Marcive" OR BIBLIOGRAPHIC MARC Tag 793 has "Open access resource; selected by the UC Libraries" OR BIBLIOGRAPHIC MARC Tag 799 has "US Office of Scientific and Technical Information"

# FY e-Resource Monographs, items

ITEM Location equal to "wb " AND ITEM Created Date between "07-01-<last year>"and "06-30-<this year>" AND (BIBLIOGRAPHIC Bib Level equal to "a" OR BIBLIOGRAPHIC Bib Level equal to "c" OR BIBLIOGRAPHIC Bib Level equal to "d" OR BIBLIOGRAPHIC Bib Level equal to "m" OR BIBLIOGRAPHIC Bib Level equal to "t") AND (BIBLIOGRAPHIC MARC Tag 85640 not equal to "" OR BIBLIOGRAPHIC MARC Tag 85641 not equal to "" OR BIBLIOGRAPHIC MARC Tag 8569 not equal to

"")

# FY e-Resource Monographs, bibs

(run off above file of items)

Collect bibs; de-dupe

# FY e-Resource Monographs, paid

(run off above file of bibs)

BIBLIOGRAPHIC MARC Tag 85640 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85641 has "Restricted to UCB IP" OR BIBLIOGRAPHIC MARC Tag 85640 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85641 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 85690 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 85691 has "Restricted to UCB," OR BIBLIOGRAPHIC MARC Tag 85690 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 85691 has "Restricted to UC C" OR BIBLIOGRAPHIC MARC Tag 959 has "UCB Access" OR BIBLIOGRAPHIC MARC Tag 959 has "Restricted to UC"

# ARL to exclude FY e-Resource Monographs, paid

(run off above file)

BIBLIOGRAPHIC MARC Tag 799 has "CRL Batch" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL LLMC" OR BIBLIOGRAPHIC MARC Tag 799 has "CRL Newsbank"

# ARL to exclude FY e-Resource Monographs, paid combined

(run off above file)

BIBLIOGRAPHIC MARC Tag 799 At Least one Field doesn't have "CRL " OR BIBLIOGRAPHIC MARC Tag 8569 not equal to "" OR BIBLIOGRAPHIC MARC Tag 9599 not equal to ""

# ARL exclude from FY e-Resource monographs = paid minus above

# FY e-Resource Monographs, free = (total) minus (paid)

# ARL exclude from FY e-Resource monographs, free

(from FY e-Resource Monographs 1 file)

BIBLIOGRAPHIC MARC Tag 599 has "Hathi" OR BIBLIOGRAPHIC MARC Tag 856 has "Marcive" OR BIBLIOGRAPHIC MARC Tag 793 has "Open access resource; selected by the UC Libraries" OR BIBLIOGRAPHIC MARC Tag 799 has "US Office of Scientific and Technical Information"

# FY e-Resource total = serials + monographs

In addition to these e-RESOURCE stats, in February 2018, Mark H. asked that we add a new **print-only serials** count to the resources that we are counting:

# Cumulative print-ONLY serials

BIBLIOGRAPHIC Bib Level equal to "s" AND BIBLIOGRAPHIC Bib Code 3 equal to "-" AND BIBLIOGRAPHIC Location All Fields don't have "wb " AND BIBLIOGRAPHIC Location not equal to "none " AND BIBLIOGRAPHIC Location not equal to "zw " AND BIBLIOGRAPHIC Location not equal to "zwz " AND BIBLIOGRAPHIC Location not equal to "zwg " AND BIBLIOGRAPHIC Location not equal to "zwt " AND BIBLIOGRAPHIC Location not equal to "zzzzz"

Appendix D: Patron Types

Numbers are internal Millennium numbers, see [AskTico](http://asktico.lib.berkeley.edu/patron-type/) for more information.

000 Undefined

001 Undergraduate

002 Undergraduate – UCB SLE

003 Graduate Student

004 Faculty/Academic Staff

005 Executive/Management

006 Library Staff

007 Non-Academic Staff

008 Faculty/Academic Spouse

009 Non-Academic Staff Spouse

010 Other UC Spouse

011 Faculty/Academic Staff Children

012 UCB Post-doc

013 UC Visiting Scholar/Post-doc

014 GTU Staff/Visiting Scholar

015 UC Extension Faculty

016 UC Extension Student

017 LBNL/LLNL Academic Staff

018 LBNL/LLNL Non-Academic/Post-doc

019 LBNL/LLNL Guest/Temp/Contractor

020 LBNL/LLNL Retired Staff

021 ICSI/MSRI/Howard Hughes Inst

022 UCB Visiting Scholar

023 UC Office of the President

024 Stanford Faculty

025 Stanford Graduate Student

026 UT Austin Faculty

027 UT Austin Graduate Student

028 CA University/Colleges Faculty

029 CA Univ/Coll Sabbatical Faculty

030 CA Public School Teachers

031 CA Private School Teachers

032 CA University/Colleges Student

033 CA Private Univ/Coll Student

034 Alumni

035 UCB Alumni Association Staff

036 CA Resident

037 Reference Use Only

038 NRLF Departmental Card

039 Library Volunteer

040 Unassigned

041 Unassigned

042 Unassigned

043 Unassigned

044 NRLF/UCB Google Cart

045 Library Departmental Card

046 Unassigned

047 ILL UC

048 Unassigned

049 ILL RLCP Institutional

050 ILL Other Libraries

051 Library Development

052 Botanical Garden Docent

053 Institute for Historical Study

054 Greek House Directors

055 Dept of Health Services (DHS)

056 Far West Labs (WestEd)

057 SFMOMA Art Staff

058 USDA – West Regional Research

059 Test Patron Faculty

060 Test Patron Staff

061 Test Patron Undergraduate

062 Test Patron Graduate

063 Test Patron Other

064 Proxy – Faculty

065 Proxy – Other

066 Affiliate/Corporate Borrower

067 Bancroft Non-UC

068 NRLF Coordinator

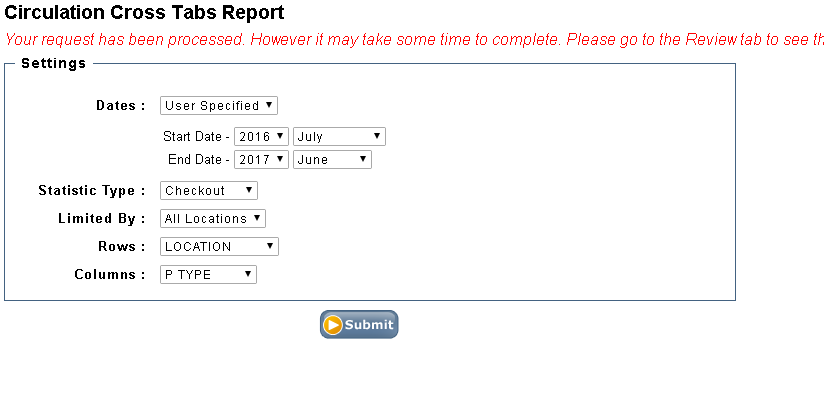
069 Unassigned

070 Unassigned

071 Unassigned

199 III training patron

Appendix E:



Appendix F: Patron type roll-up for Circ counts

Campus Undergrads

Undergraduate

Undergraduate - UCB SLE

UC Extension Student

Campus Graduate Students

Graduate Student

Stanford Graduate Student

UT Austin Graduate Student

Campus Academic

Executive/Management

Faculty/Academic Staff

Far West Labs (WestEd)

GTU Staff/Visiting Scholar

ICSI/MSRI/Howard Hughes Inst

LBNL/LLNL Academic Staff

Proxy - Faculty

Stanford Faculty

UCB Post-doc

UCB Visiting Scholar

UT Austin Faculty

UC Visiting Scholar/Post-doc

UC Extension Faculty

Campus Staff

LBNL/LLNL Guest/Temp/Contractor

LBNL/LLNL Non-Academic/Post-doc

LBNL/LLNL Retired Staff

Library Departmental Card

Library Development

Library Staff

Library Volunteer

Non-Academic Staff

UC Office of the President

All Others

Alumni

CA Private Univ/Coll Student

CA Public School Teachers

CA Resident

CA University/Colleges Faculty

CA University/Colleges Student

Dept of Health Services (DHS)

Faculty/Academic Spouse

Faculty/Academic Staff Children

Non-Academic Staff Spouse

Other UC Spouse

Reference Use Only

SFMOMA Art Staff

Appendix G: Location roll up for Circ counts

See [AskTico for a full list of location codes](http://asktico.lib.berkeley.edu/location-codes/).