

Automating Cornell University Library's annual data collection using LibPAS

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Opportunities

- Customizable, decentralized reporting.
- Chance to review and rethink everything, involving others.
- Chance to build goodwill.



Challenges

- Large, complicated organization with changing needs.



Conceptual shifts

- Data available immediately to all users.
- More emphasis needed on usability for end users.
- A greater opportunity and need to focus on the consistency of data elements over time.



Cornell University

Key decision points

Preliminaries:

- Who is responsible?
- How should the hierarchy for reporting locations be set up?
- How often will data be collected, and at what location level?
- Which measures should be included? Which dropped?
- How many retrospective years will be input?



Measure collections:

- Is there any data that should not be available to all staff?
- Within collections, how will measures be grouped, ordered and named?
- Should all measures be summed during roll-up?
- Where should overarching data notes be recorded?

User access / Collecting data:

- Who should have access?
- How many data input forms are needed?
- How will data collected centrally from online systems be added?
- Will you make corrections in previous years' data?

Reporting / Training:

- How should staff be trained?
- How do you indicate that data is still in draft?
- Which report templates should you make available to end users?

Key recommendations

- Start well in advance of the target implementation date. Allow time for usability testing.
- Learn all key system functionality up front (on a smaller scale) to aid in set up decisions. Create a test collection.
- When creating the location hierarchy, consider how you will report data out most often. Create additional levels when units share multiple measures. Balance power with ease of use.
- Have one retrospective year input for the first data collection.

Facilities & Access	with Olin	with Olin with On
In-person visits	163	165
User seats	36,619	36,619
Net square footage		

- Keep naming and measure order conventions consistent, and as helpful as possible to users.

<input type="checkbox"/> Information transactions - non-e
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<input type="checkbox"/> Information transactions - e - chat (calc)
<input type="checkbox"/> Information transactions - e - text messaging (PI introduced 2010)
<input type="checkbox"/> Information transactions - e - email/cannot be categorized
<input type="checkbox"/> Information transactions - e - VoIP (PI introduced 2011)
<input type="checkbox"/> Information transactions - e (calc)
<input type="checkbox"/> Information transactions (calc)
<input type="checkbox"/> % information transactions reported as electronic (calc)
<input type="checkbox"/> Information transactions sampled? (PI introduced 2010)

- Exceptions will require extra measures. Make sure you need them.

Volumes	Total
Volumes added new - on campus (PI introduced 2009)	n/a
Volumes added new - at Annex (PI introduced 2009)	n/a
Volumes added new - on campus & at Annex (PI introduced 2009) (calc)	-Select-
Total volumes added new in Annex (PI introduced 2009)	4,826

- Set input access rights w/ unit heads.
- Import centrally collected data into LibPAS yourself, saving files.
- Train staff before giving them reporting rights.
- Create a supporting online portal for data providers and users.

Where we are now

- Quick, customizable reporting, from any computer, with 5 years of data.
- Data providers happier. Offering training for ad hoc reporting annually.
- Multiple reports created for different audiences: longitudinal, institutional level Excel report publicly available for external audiences; and unit-specific LibPAS trend and % change reports in portal for library staff only.



Welcome! This wiki supports CUL staff providing data for, and using data from questions or any ideas to improve this site; email Assessment & Communicator 255-7401, or Joanne Leary (JL41, 255-5936).

Annual statistics reports, unit-specific data and data notes:

- CUL's published annual statistics reports (eCommons)
- CUL's unit-specific data and data notes - CUL staff use only
- CUL's measure definitions (last updated 7/1/11)

Entering data into LibPAS for the annual data collection

Do-it-yourself: Generating Custom data from LibPAS

Unit library specific data - 2007/08 to 2010/11 (4-year comparison)

Consult data notes for context on data: 2007/08 2008/09 2009/10 2010/11 2007/08-2010/11 Excel

- CUL
- Ithaca/Geneva
- Adelson
- Africana
- Annex
- Asia Collections
- Engineering
- Entomology
- Fine Arts
- Geneva

Asia Collections - 2007/08 to 2012/12 (see Olin for shared circ & visit counts; see Olin for FY08 exp & staffing counts)

Collection	2007/08	2008/09	2009/10	2010/11	DRAFT 2011/12
Volumes held end of year - on campus	898,890	892,893	725,199	762,846	716,895
Volumes held end of year - at Annex	488,263	478,881	484,138	486,626	524,491
Volumes held end of year - on campus & at Annex (calc)	1,387,153	1,371,774	1,209,337	1,249,472	1,241,386

- Reporting cheat sheets and filterable file of data notes for staff at portal.

2010/2011 - Which locations have data reported at them (if available) for each PI group*	Locations	Collections	Services	Facilities	Staffing	Users	Books
Cornell University Library	x	x	x	x	x	x	x
Ithaca & Geneva Campuses	x	x	x	x	x	x	x
New York Campus							
Adelson Library	x	x	x	x	x	x	x
Africana Library	x	x	x	x	x	x	x
Annex	x	x	x	x	x	x	x
Asia Collections	x	x	x	x	x	x	x

CUL Annual Data Collection Data Notes in Excel

2007/08-2010/11 (and corrections for 2006/07 made in 2007/08)

see the previous worksheet for instructions

Order num	Year	Location	Measure area	Note
13	2010/11	CUL/IG	Technical notes - informat	Counts are somewhat
14	2010/11	CUL/IG	Technical notes - users	PhD fields and PhD
15	2010/11	Ithaca and Geneva	Overarching	See CUL
16	2010/11	Adelson	Overarching (expenditures)	The permanent, pi
17	2010/11	Adelson	Expenditures/staffing	General operating
18	2010/11	Adelson	Information/Instruction/ou	The 2010/11 coun
19	2010/11	Adelson	Facilities/access	The library visit co
20	2010/11	Africana	Collections use	Laptop charges pr