LibStats

User Manual

Contents

1 Introduction

LibStats is an open source online tool for collecting and reporting on statistics in an academic library. LibStats is licensed under GNU-GPL

The LibStats software files can be found at
http://www.library.uq.edu.au/software/
The User Manual and Technical manual are available as Word documents on the University of Queensland Library website at
http://www.library.uq.edu.au/about/qm.html

There are four modules in LibStats

- Enter Statistics
- Manage Users
- Configure LibStats
- Reports

The user logging in at the University of Queensland sees this screen:

Figure 1: Main Screen

The **Configure LibStats** module allows the System Manager to set up the tables for statistics to be collected. Statistical categories (Loans, Enquiries) can be grouped, and subsets of the category set into columns. Notes and instructions can be included.

The **Manage Users** module allows for the enrolment of staff members with varying levels of access and rights to work with the system.

The **Enter Statistics** module allows for the entry of figures into the various categories, and the importation of values from Excel, and from the Integrated Library Management System.

The **Reports Module** produces various reports:

- Totals, (for years, months, quarters, semester) for whole-of library or individual branches/sections
- Branch comparison reports
- Time Series reports
- Percentage change reports
- Cumulative reports
- CAUL report (Australia, for reporting to the Council of Australian University Librarians)

2 Users

In this manual, the following roles are considered:

- **Reporter** - Enters stats into the application.
- **Viewer** - Views reports on stats.
- **Manager** - Controls who can access which stats including editing and viewing of stats.
- **Administrator** - Configures the software, and is concerned with installation and maintenance of the software.

Reporter Tasks

2.1 Logging In

The login screen appears when your LibStats link is accessed. Use your username and password. Before you can be allowed access, a Manager or Administrator must have previously added your username to the system.

Figure 2: Login screen

2.2 The Welcome Screen

The first screen you see is the welcome screen.

Figure 3 - Main / Welcome Screen

On this page, you can see the menu of LibStats modules, and any important messages on the right hand side.

Along the top, under the Library Banner, there are two horizontal strips which are common to every page of the application.

The top strip is a navigation menu.

The second strip shows, on the left, your name as the current login, and provides a logout link. On the right, there is a dropdown box for selecting which branch you are currently entering stats for. Most users will only have one option but some may be able to enter stats on a number of branches. The current branch you are acting in is set here.

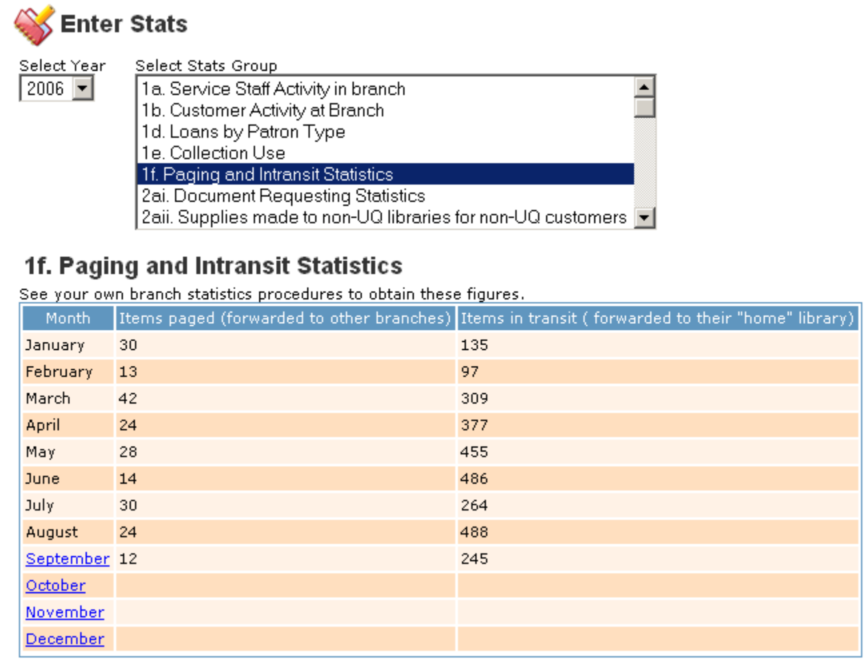
The centre of the second strip is used for displaying feedback messages when changes are made. These messages will display in green. (eg Stats Recorded when you have entered new figures.

2.3 Recording Stats

Click on the “Enter Statistics” link. The display will show a Select Year option, a Select Branch option (this will automatically show the Branch for which you are authorised), and a Select Stats Group option. Click on the stats group you wish to record figures for.

Figure 4 - Select Stats Group

When you click on a Stats Group, an overview of the year for that group appears (there may be a short delay, and during this time a red ‘Loading…’ label appears).

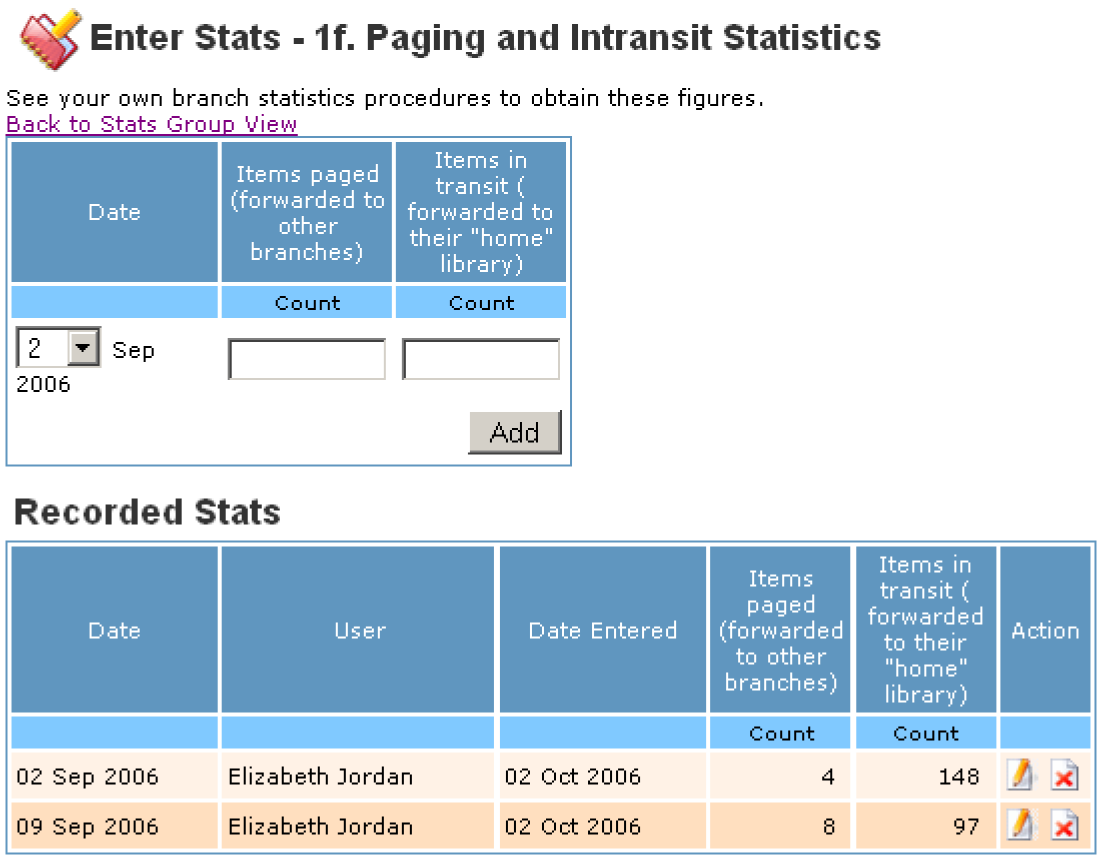


Month	Items paged (forwarded to other branches)	Items in transit (forwarded to their "home" library)
January	30	135
February	13	97
March	42	309
April	24	377
May	28	455
June	14	486
July	30	264
August	24	488
September	12	245
October		
November		
December		

Figure 5 - Stats Group Overview.

The Stats Group Overview shows values already entered and has links on the names of the months which lead to the stats entry screen. Some of the months may not have links (they are black instead of underlined blue). This is because stats entry has been closed for those months – the stats are closed to a schedule by the stats administrator. If none of the months show links, then you may not have authorisation to enter stats on this group or branch. A Manager or Administrator must authorise you to be able to enter stats in the system.

When you click on the month for which you want to enter figures, the stats entry screen shows a form for entering stats and displays a log of stats already entered for the month. The top form is where that statistics should be entered. The form will check that numbers or times have been entered correctly. Commas are not accepted in numbers. Click ‘Add’ to save the statistics you have entered.



Enter Stats - 1f. Paging and Intransit Statistics

See your own branch statistics procedures to obtain these figures.
Back to Stats Group View

Date	Items paged (forwarded to other branches)	Items in transit (forwarded to their "home" library)
	Count	Count
2 Sep 2006		

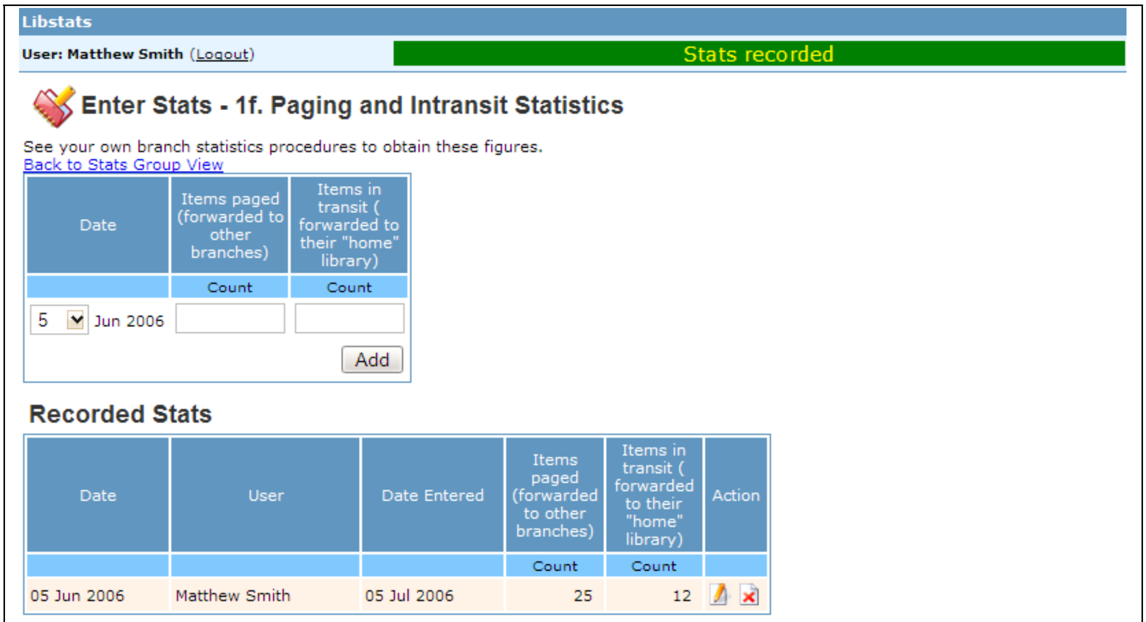
Add

Recorded Stats

Date	User	Date Entered	Items paged (forwarded to other branches)	Items in transit (forwarded to their "home" library)	Action
			Count	Count	
02 Sep 2006	Elizabeth Jordan	02 Oct 2006	4	148	
09 Sep 2006	Elizabeth Jordan	02 Oct 2006	8	97	

Figure 6 - Stats Entry Form

Once the statistics have been submitted, a green message will appear at the top of the screen to confirm that the values were recorded. The log in the second half of the screen will show details of the statistics you recorded.



Libstats
User: Matthew Smith (Logout) Stats recorded

Enter Stats - 1f. Paging and Intransit Statistics

See your own branch statistics procedures to obtain these figures.
Back to Stats Group View

Date	Items paged (forwarded to other branches)	Items in transit (forwarded to their "home" library)
	Count	Count
5 Jun 2006		

Add

Recorded Stats

Date	User	Date Entered	Items paged (forwarded to other branches)	Items in transit (forwarded to their "home" library)	Action
			Count	Count	
05 Jun 2006	Matthew Smith	05 Jul 2006	25	12	

Figure 7 - Stats Entry Screen. The message bar at the top shows that stats were successfully entered

Check the log to make sure the values you entered have been recorded correctly. If there is a mistake, you can change the values by clicking the pencil and paper icon on the right hand side of the row. This will load the values back into the top form where you can change them. There will be an 'Update' button instead of an 'Add' button, click it to save the values.

You can delete stats that you have entered by clicking on the red X. (You can only update or delete statistics that you have yourself entered, unless you are an administrator on this group).

For some tables, the stats may be collected weekly. The statistics recorded for each week will be listed in the rows on the second half of the screen. All of the rows are automatically added together for the monthly report.

3 Importing Statistics

On the ‘Enter Stats’ page, there is a menu showing all of the importing options.

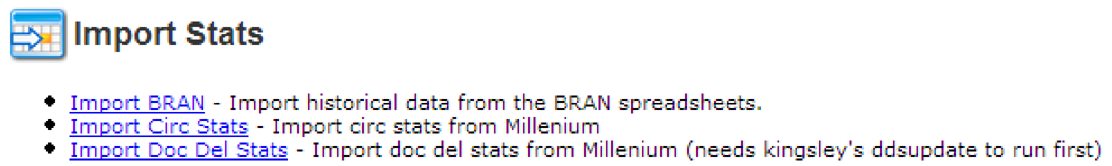


Figure 1 - Import Stats Options

3.1 Import from Excel

This should only be needed for importing historical data and will be a one-off exercise, performed by the System manager or designee.

NOTE: This only works on the newer webserver (new1 (needs PHP 5+)) access to this server will be arranged for users who are importing historical data.
Before uploading, the spreadsheet must be saved in XML Spreadsheet format. Do this by opening the spreadsheet in Excel and choosing ‘Save As’ from the ‘File’ menu. In the ‘Save As’ dialog box there is an option for saving XML Spreadsheet.

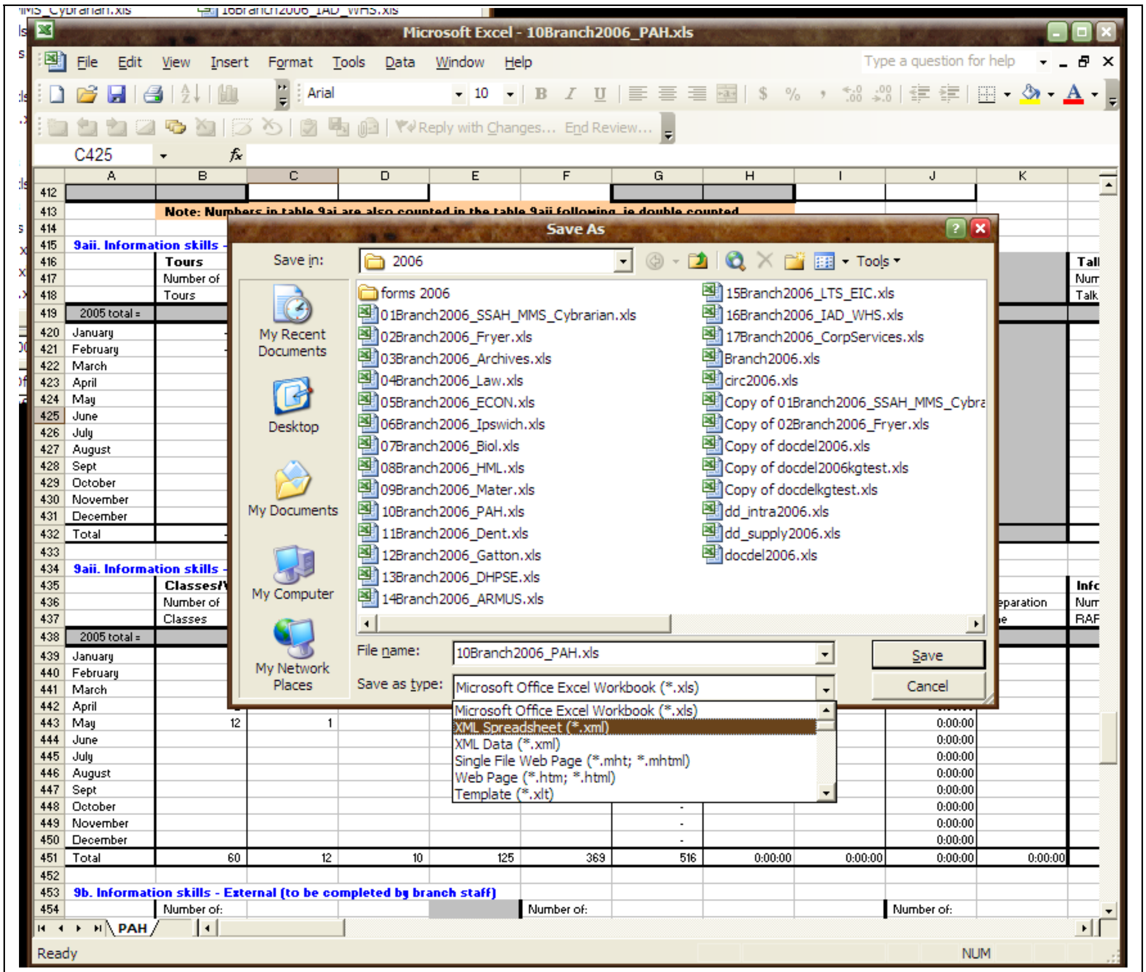


Figure 8 - Saving as XML Spreadsheet

To import stats from a BRAN spreadsheet, click the ‘Import BRAN’ link. A form appears prompting to upload the BRAN spreadsheet.

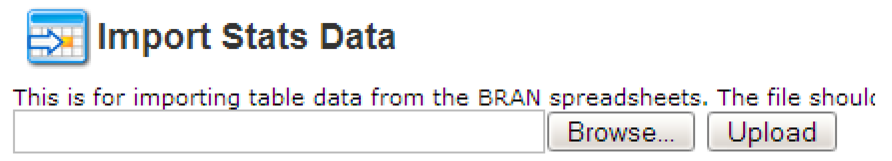


Figure 92 - Form for uploading BRAN spreadsheet

The Import Stats Data form appears. This form has a selection box at the top for selecting the year and Stats Group which you will be importing from the spreadsheet. The Spreadsheet appears in a table on the bottom half of the page.

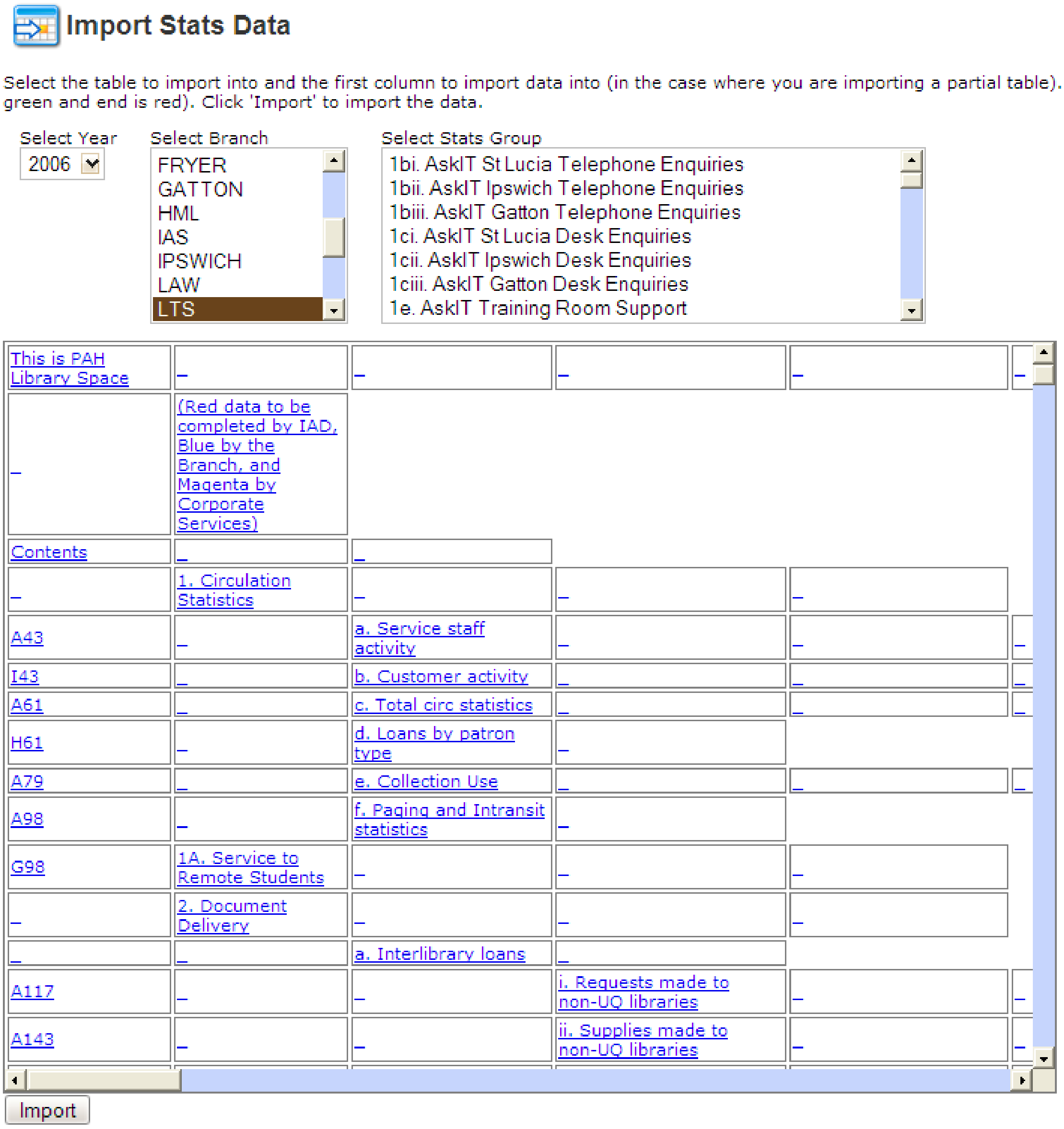


Figure 10 - Import Stats Data

Select the Year and Stats Group to Import. Two more select lists appear which have the column and row names for the stats group. You should select the column and row of the table where you intend the import to start at.

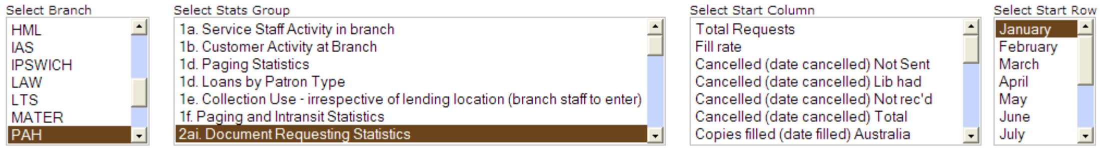
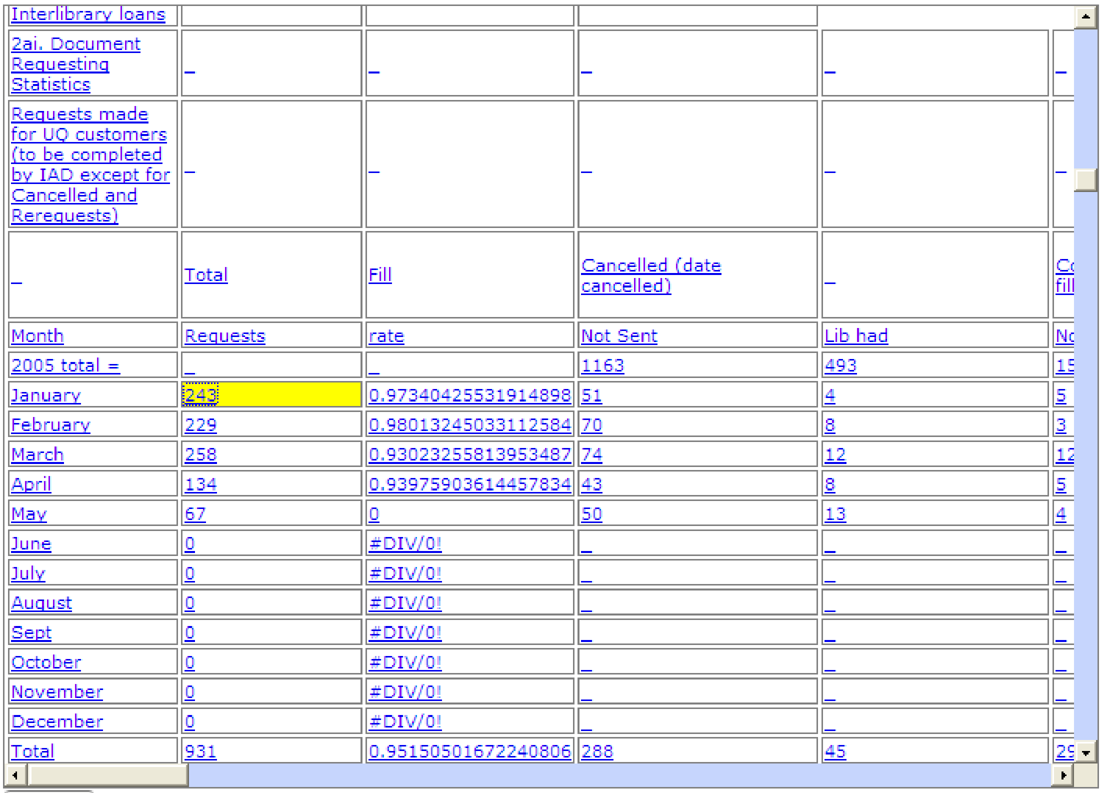


Figure 11 - Selecting the start column and row

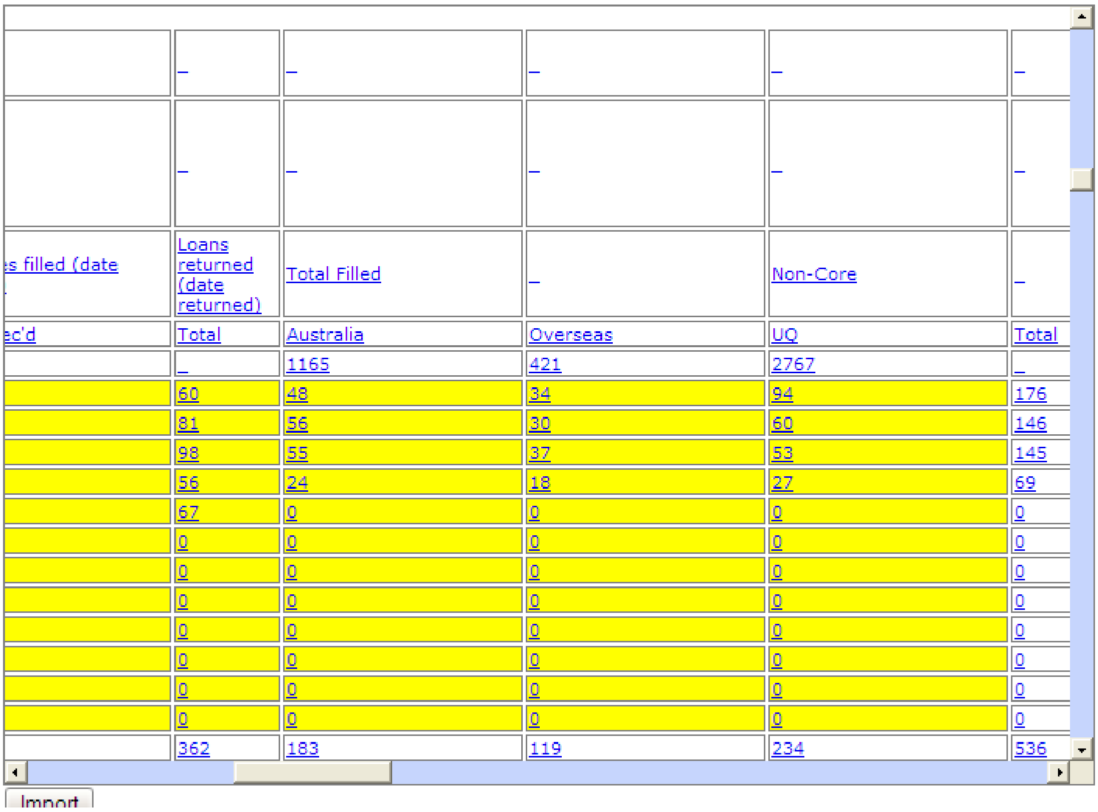
Find the place in the spreadsheet which corresponds to the start column and row selected above. Click on the cell that corresponds to the start column and row.



Interlibrary loans					
2ai. Document Requesting Statistics	_	_	_	_	_
Requests made for UQ customers (to be completed by IAD except for Cancelled and Rerequests)	_	_	_	_	_
_	Total	Fill	Cancelled (date cancelled)	_	Co fill
Month	Requests	rate	Not Sent	Lib had	No
2005 total =	_	_	1163	493	15
January	243	0.97340425531914898	51	4	5
February	229	0.98013245033112584	70	8	3
March	258	0.93023255813953487	74	12	12
April	134	0.93975903614457834	43	8	5
May	67	0	50	13	4
June	0	#DIV/0!	_	_	_
July	0	#DIV/0!	_	_	_
August	0	#DIV/0!	_	_	_
Sept	0	#DIV/0!	_	_	_
October	0	#DIV/0!	_	_	_
November	0	#DIV/0!	_	_	_
December	0	#DIV/0!	_	_	_
Total	931	0.95150501672240806	288	45	29

Figure 12 - Selecting the Start Row and Column

Select the end row and column that will be imported. The area to be imported will be highlighted. If there are columns missing from the table, you may have to import it in two parts.



	_	_	_	_	_
	_	_	_	_	_
s filled (date	Loans returned (date returned)	Total Filled	_	Non-Core	_
ec'd	Total	Australia	Overseas	UQ	Total
	_	1165	421	2767	_
	60	48	34	94	176
	81	56	30	60	146
	98	55	37	53	145
	56	24	18	27	69
	67	0	0	0	0
	0	0	0	0	0
	0	0	0	0	0
	0	0	0	0	0
	0	0	0	0	0
	0	0	0	0	0
	0	0	0	0	0
	0	0	0	0	0
	362	183	119	234	536

Import

Figure 13 - Selecting the End Row and Column

To import the data, click ‘Import’. The form is reloaded and a message appears at the top of the screen to confirm the action.

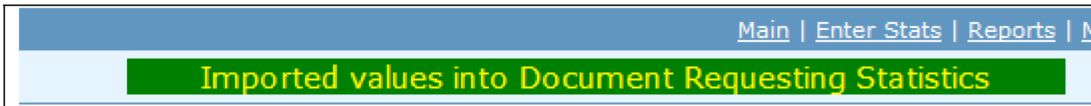


Figure 14 - Importing Success

More tables can be imported from the same form as it keeps the spreadsheet in memory as long as the browser window is open on the import stats form. You can open another browser window to check imported values in the reports as well.

3.2 Import Circ Stats

These stats are obtained from Millenium by staff in IAS. To enter them into LibStats, click the ‘Import Circ Stats’ link. This will load a form to locate the export file from millennium.

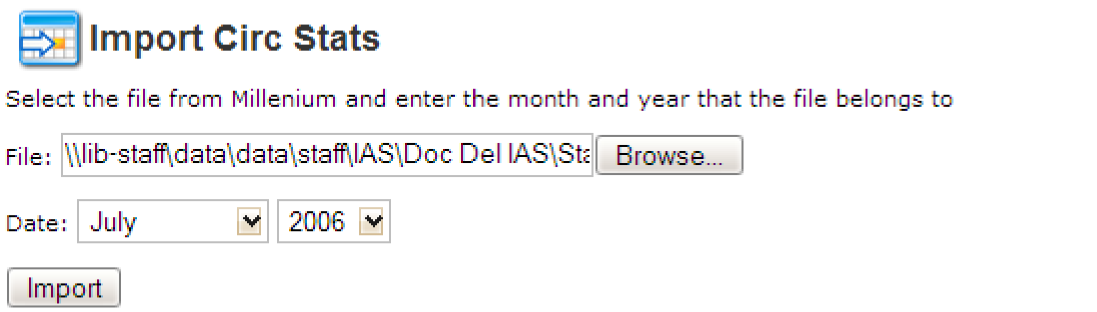


Figure 15 - Circ Stats Import

Click ‘Browse’ to load the file to be imported. Don’t use the excel version of the file, use the raw file from millennium. These files are usually located at: ‘\\lib-staff\data\staff\IAS\Doc Del IAS\Statistics\Circ Weekly Statistics\Monthly Branch 2006’.

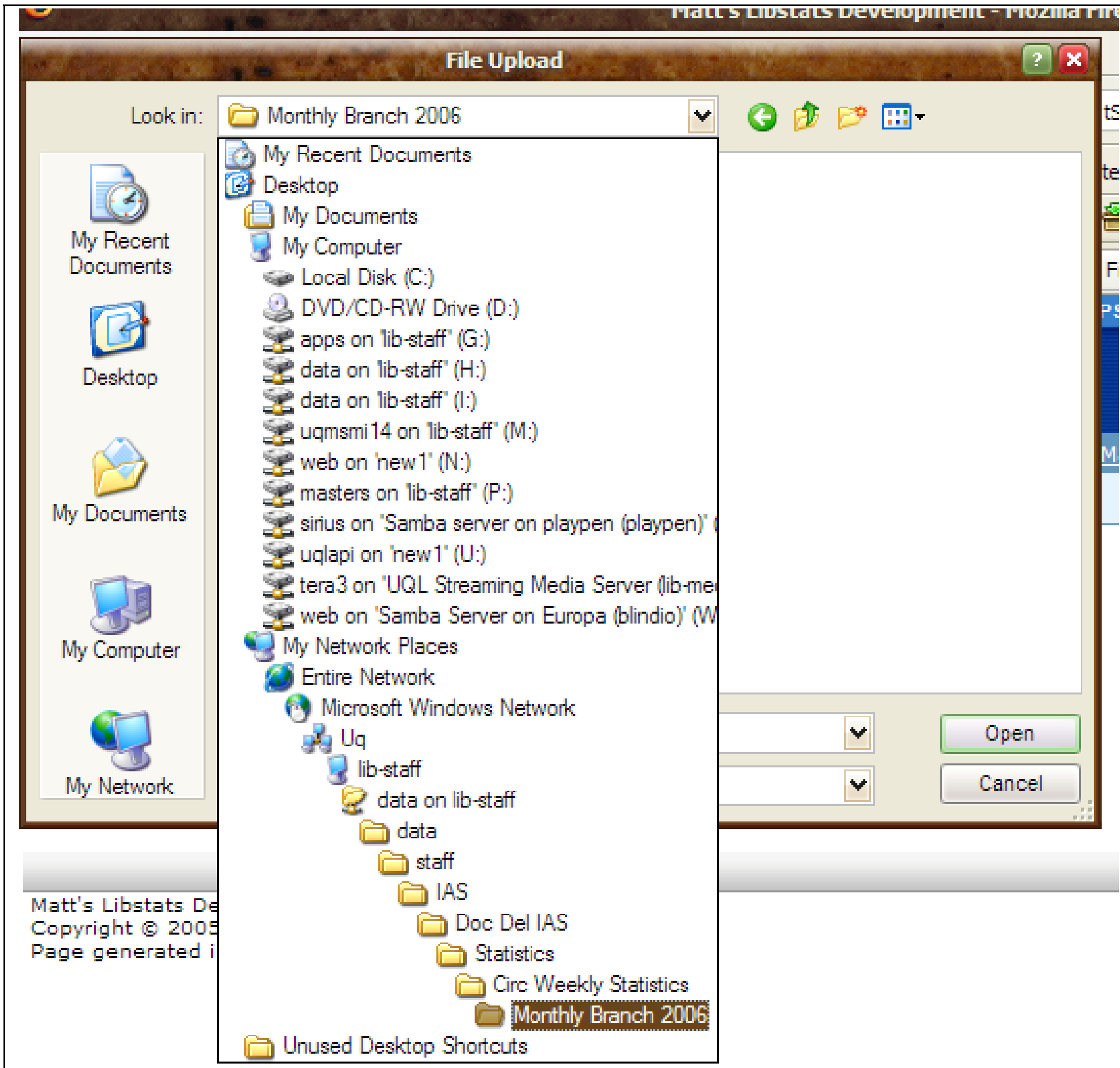


Figure 16 - Location of millenium circ stats export files

Once the file is located, select the month and year that this file has data for. Then click ‘Import’. The values will be loaded into Stats Groups 1a and 1b.

3.3 Import Doc Del Stats

This procedure is similar to the Circ Stats Import. These statistics are exported from Millenium in IAS. In this case, the exported data is stored in a database already and just needs to be copied across to LibStats. This is a manual process at the moment but can be fully automated in future.

On the Enter Stats page, click ‘Import Doc Del Stats’. A form appears prompting for the month and year to import. Select the month and year that needs to be updated and click ‘Import’.

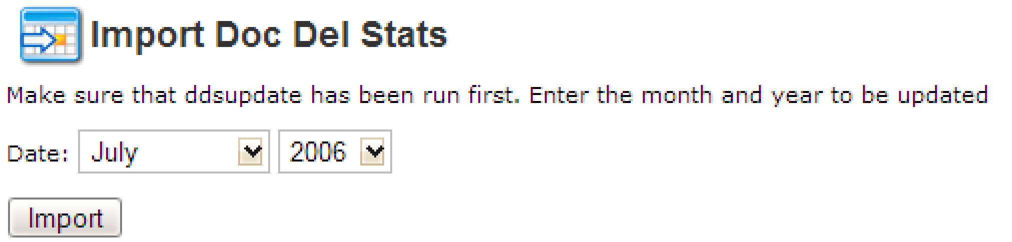


Figure 3 - Import Document Delivery Statistics

4 Manager Tasks

The manager controls which users can have access to which Stats Groups. When the manager logs in, there is an extra menu item called 'Manage User Access'. Click on the 'Manage User Access' item to view the management pages.

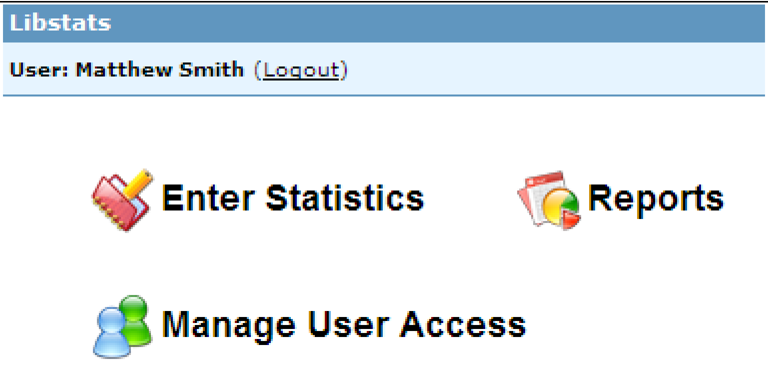


Figure 18 - Welcome Screen Extra Menu item for Manager

The Manage User Access page has an extra menu on the left for choosing the different levels of access management – individual users, branches, and an authorisation page.

Figure19 - Extra menu on left of management pages

4.1 Users

Clicking on the ‘Users’ link on the left accesses the page for enrolling users. This page is used to give users access to the software. All Library Staff can log in but they will not be able to enter stats unless they are enrolled on this page. (They will only be able to see **Reports**)

Each user must be allocated a role in the system. A ‘Standard User’, has access to the **Enter Statistics** and **Reports** pages. Managers have access to the **Manage User Access** pages and Administrators can access the **Configure LibStats** pages. Only an Administrator can make someone else into an Administrator. Managers can assign the management role to other users.

The Primary Branch controls which branch will be selected for stats entry when the user logs in.

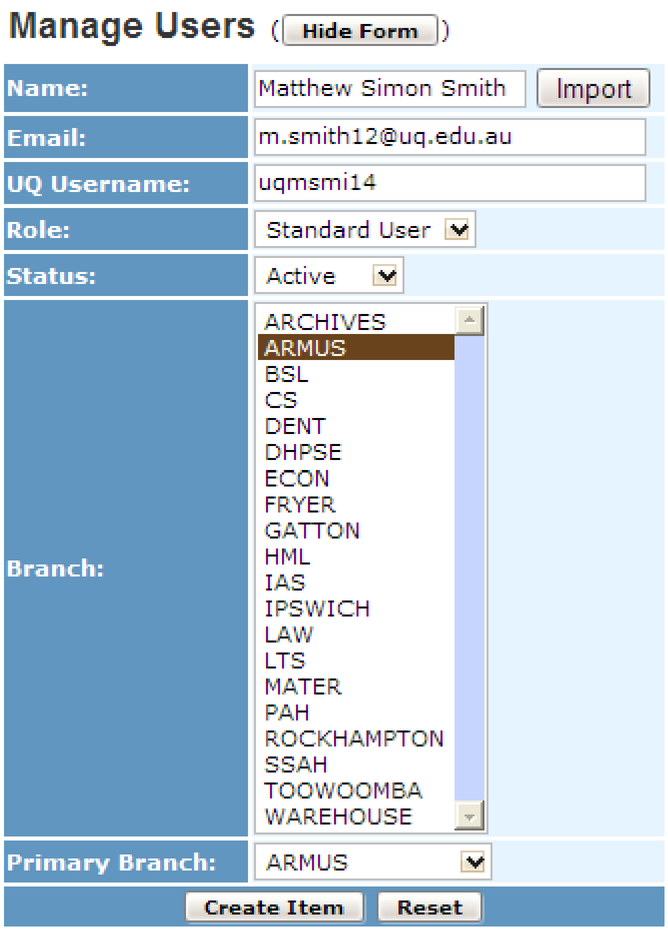


Figure 4 - Manage Users Page

When the name of a user is typed, the system searches the library staff database as you type. Clicking the ‘Import’ button loads the details from the database into the form as a convenience. You must then click ‘Create Item’ to save the user in the system.

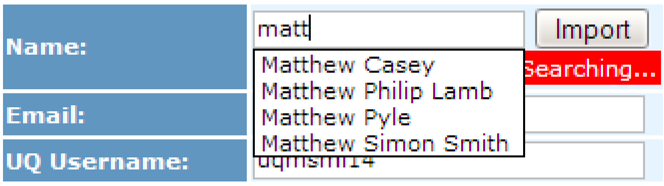


Figure 21 - The form shows matches in the UQ user database in a dropdown list as you type.

NOTE: before adding a user to the system, check that they are not already in the system but shown in another branch. The Manage Branches page can be used to do this.

4.2 Manage Branches

The manager can add and remove users from their branch. Some managers can access multiple branches but most will see just their own branch.

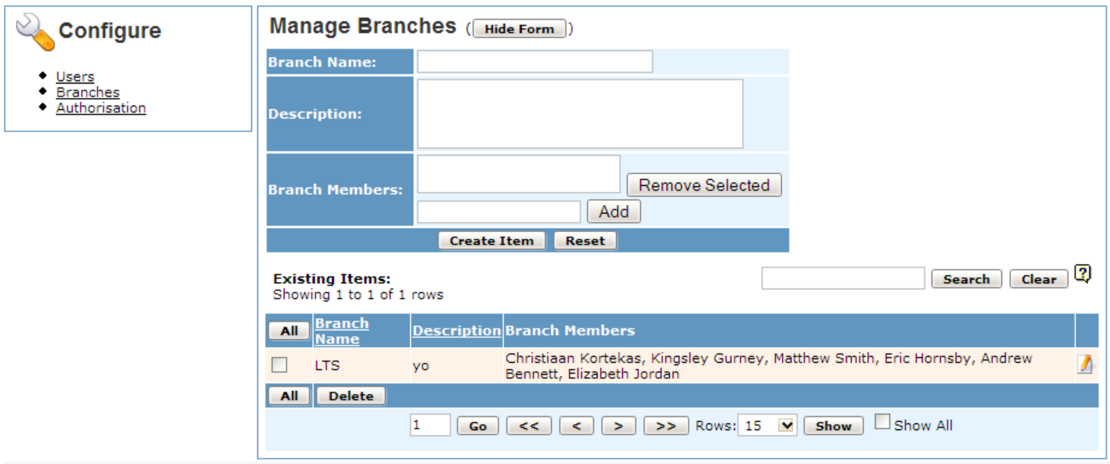


Figure 22 - Manage Branch

The screen consists of a form at the top and a list of branches that can be accessed at the bottom. To edit a branch, click the pencil and paper icon on the right hand side of the list.

Members can be added to the branch by typing their name in the text box next to the ‘Add’ button. As you type, users with similar names appear in a dropdown box.

If the user is not already in the system, their name will not appear in the drop down box. When you click ‘Add’, they will be added to the users’ table for your branch. When you click ‘Add’ the user’s name appears in the list above the ‘Add’ button. Each of the users has a red X next to their name. Clicking on the X will remove users from the list.

Finally, click on Create Item, and the user’s name will be added to the branch in the table below the form.

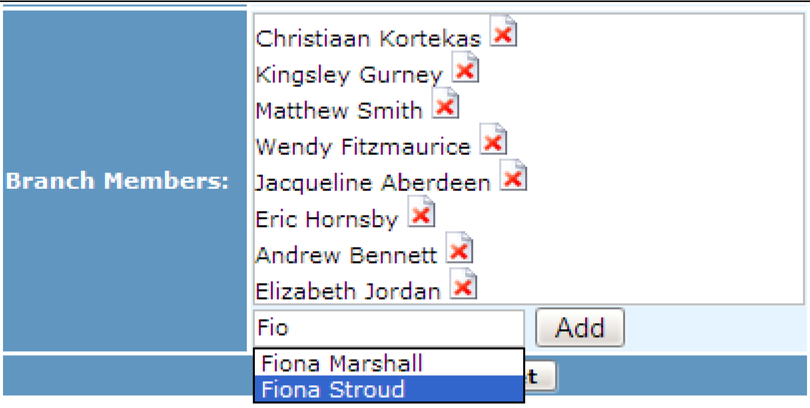


Figure 23 - Adding a User to a Branch

4.3 Manage Authorisation

The Authorisation page controls the rules for who can enter which statistics. There are a number of rules in the system governing access the system. A user must match one of the rules to be able to enter statistics.

To allow a user to enter stats, you first enter the name of the user that you are granting this access for.

Next choose their role. This can be Editor, Viewer or Admin. An Editor can enter stats and a Viewer can only view reports. An Admin is able to update and delete stats of other users in their branch. This might be used if a person is on leave.

Next select whether the user will access all of the stats groups in a branch or just a specific stats group. Leave this field blank, if you want them to be able to access all of the stats groups for a branch.

Select the Branch that you want to give the user access to.

Click on Create Item. The newly authorised user's name will appear in the table below the form.

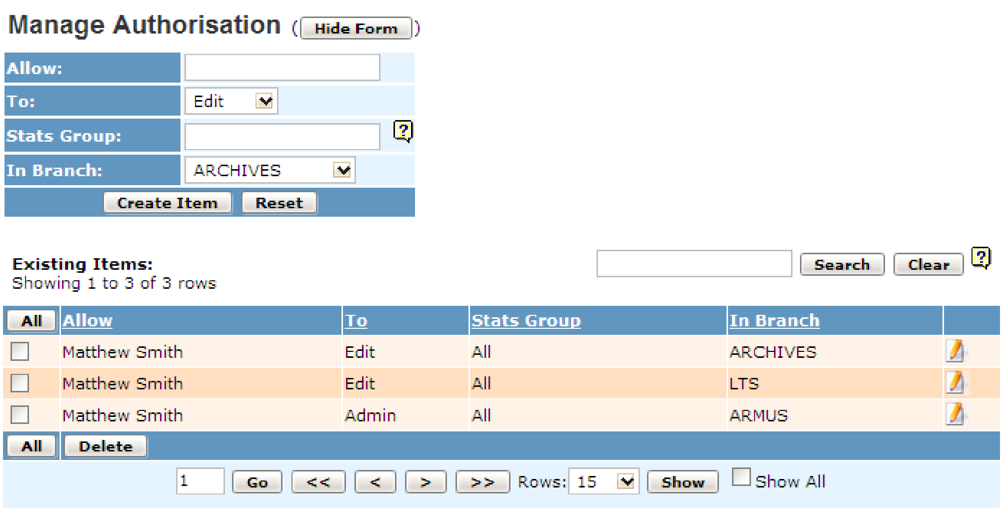


Figure 24 - Authorisation Page

5 Administrator Tasks

When an administrator logs in, the Welcome page shows the‘Configure LibStats’ link.

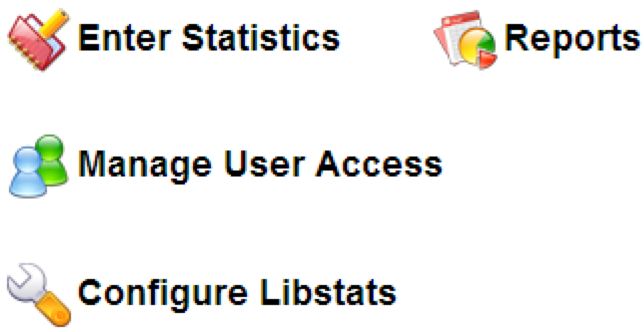


Figure 25 - Welcome Page with Administration item

Click the ‘Configure LibStats’ option.

5.1 Stats Groups

As in the Management pages, the function is selected from the menu on the left. The default opening page is “Stats Groups”.

The Stats Group form is used to create a Stats Group or edit an existing group.

The Group number and subgroup code letter are entered first, then the name of the Group. The ‘Notes’ field controls the explanatory text that will appear on the stats entry form under the title of the Group.

‘Branches’ controls which branches this group is available in. Names of columns are entered into the lower box in this section. The Add button must then be clicked.

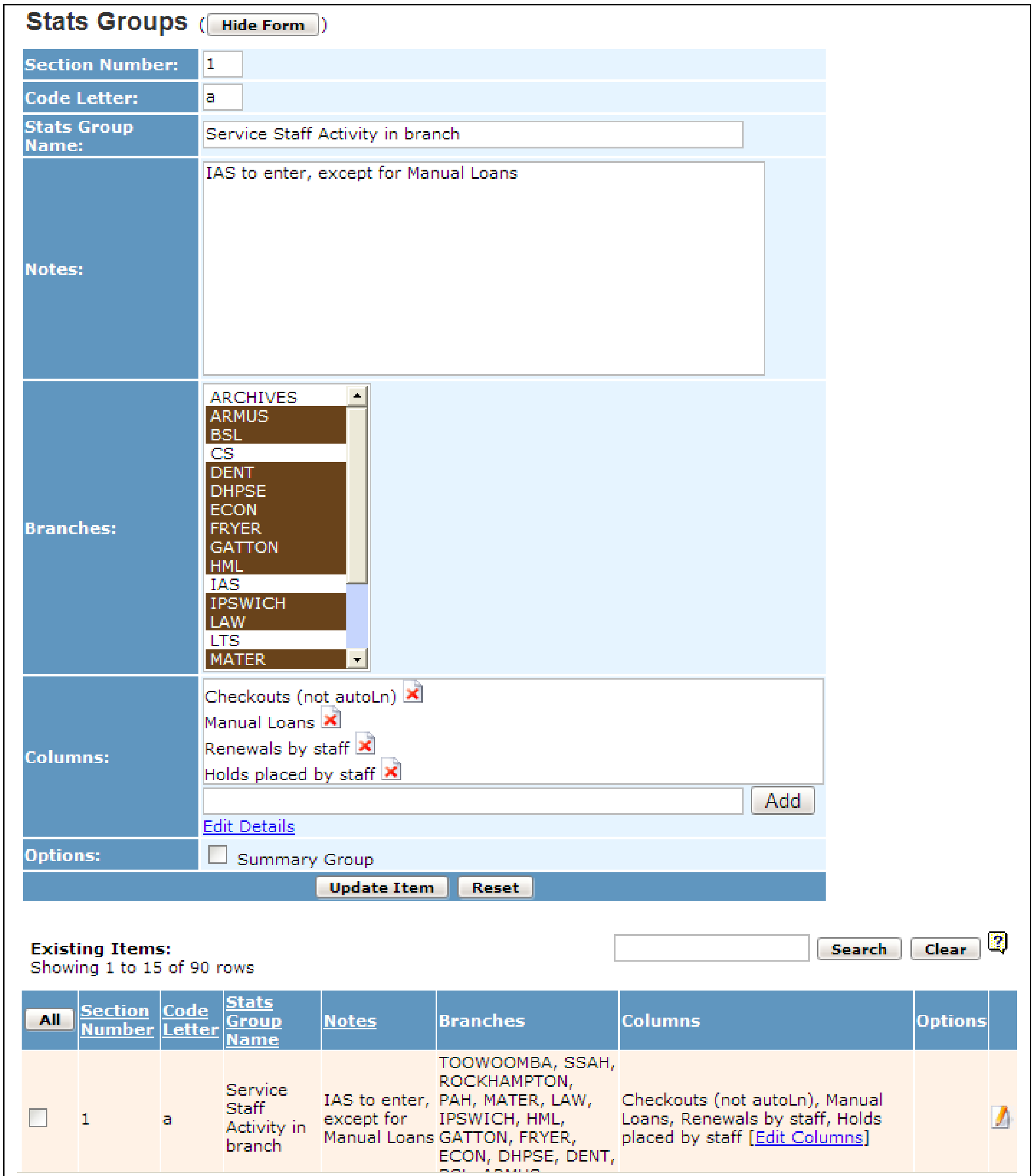


Figure 26 - Manage Stats Groups

Some of the tables for entering stats are not collected monthly but are entered once for the year. These stats groups are called ‘Summary Groups’. Summary Groups have custom row names (as opposed to being months of the year). Tick the ‘Summary Group’ box if your stats group is not monthly. An extra entry box appears to allow row names to be entered.

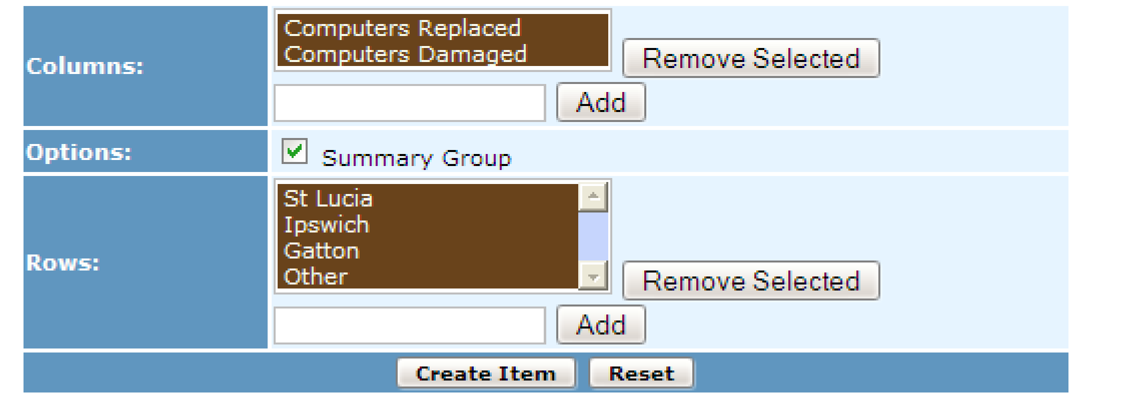


Figure 27 - Entering a Summary Group

5.2 Edit Rows/Columns

From the Stats Group page, the columns can be edited by clicking the 'Edit Columns' link in each Group. When editing a Stats Group record, there are 'Edit Details' links on the form which access the columns (or row details on summary tables). This form allows you to change the Column name, control the text in the 'mouseover' for the column (that the user will see when they are entering the stats) and set the type of the column.

The 'Type' can be a count of items or a 'time spent' which allows entry of h:mm values.

The order of the columns can be changed by dragging and dropping the rows in the list or using the up/down buttons on the right. The reordering is not saved until the 'Save Order' button is clicked.

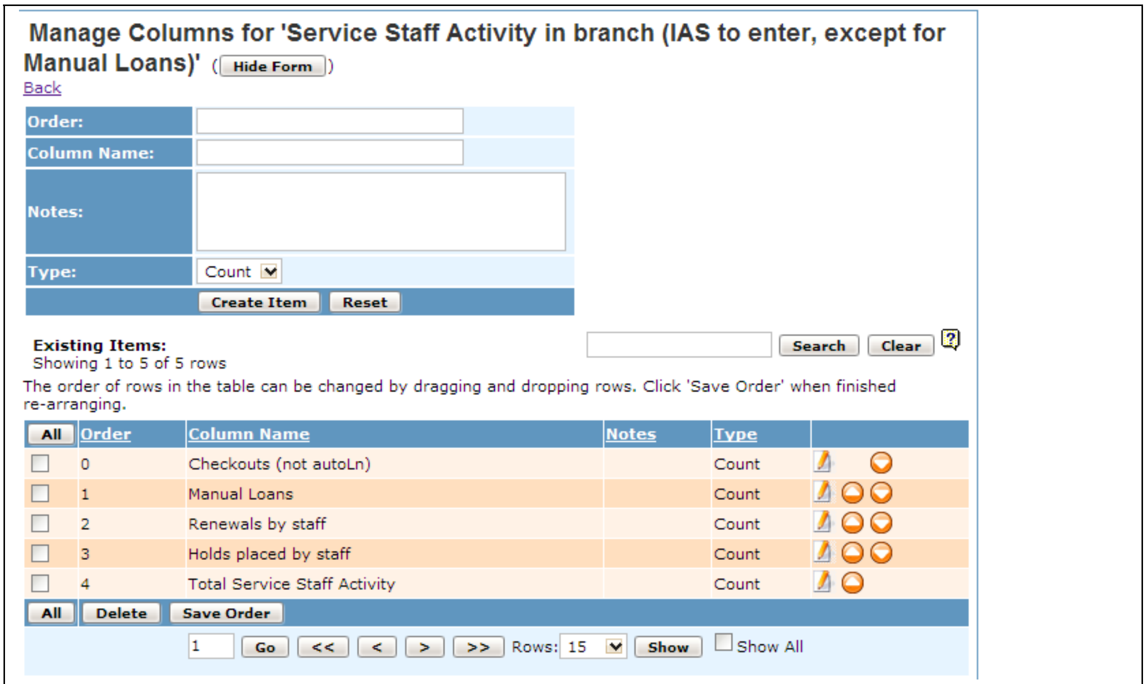
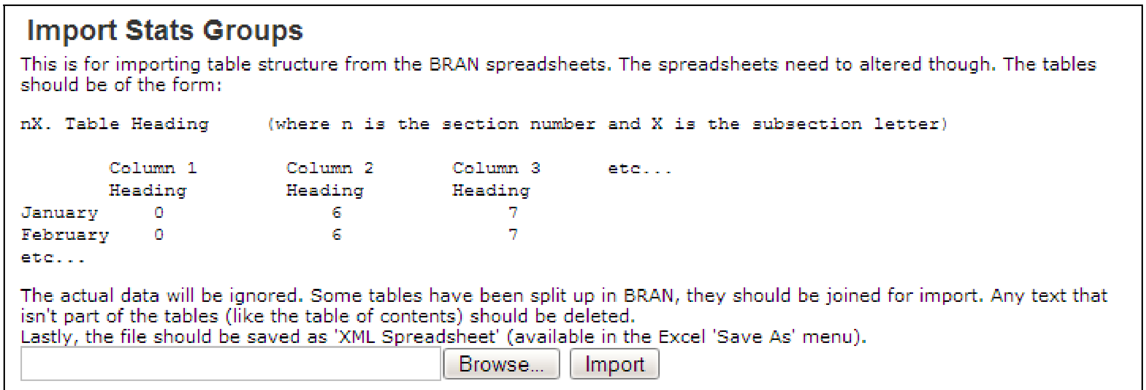


Figure 28 - Configure Columns Page

5.3 Import Stats Groups

This is an advanced function used when setting up the system. It should never have to be used again but is documented here is case something similar is needed in future.

This does not import actual statistics, it only imports the structure of the tables.



Import Stats Groups

This is for importing table structure from the BRAN spreadsheets. The spreadsheets need to altered though. The tables should be of the form:

```
nX. Table Heading     (where n is the section number and X is the subsection letter)

        Column 1        Column 2        Column 3      etc...
        Heading         Heading         Heading
January     0               6               7
February    0               6               7
etc...
```

The actual data will be ignored. Some tables have been split up in BRAN, they should be joined for import. Any text that isn't part of the tables (like the table of contents) should be deleted.
Lastly, the file should be saved as 'XML Spreadsheet' (available in the Excel 'Save As' menu).

Browse... Import

Figure 5 - Importing Stats Groups

The page gives instructions on how to save the spreadsheet and make sure the layout of the tables are as the system expects them.

The BRAN spreadsheets cannot be imported as they are – a copy should be made so that it can be edited before importing. All of the merged columns need to be split up as these confuse the importer logic. Also each of the stats groups must have a heading with the section number. Any notes must be under the Section heading but above the table. The heading row of each table must have the first column blank. The tables must have the month names in the first column. Totals rows in the first row of the tables should be deleted.

To save a BRAN spreadsheet as XML Spreadsheet, open it in excel and choose 'Save As' from the 'File' menu. Then choose the file location and press Ok.

Then on the web form (shown above) click the 'Browse' button and choose the file that was just saved from excel.

The import function is quite fragile and the tables need to be checked once they are imported. However, this can save time if a lot of groups need to be added at once. This was used to initially populate the stats groups in the system.

NOTE: This doesn't work on Sirius. To make this work, the system was installed on a server with a more recent copy of PHP (requires PHP 5+ with DOM enabled)

5.4 Close Stats

Close Stats

Branch	Closed Date
ARMUS	02 Mar 2006
BSL	02 Mar 2006
CS	02 Mar 2006
DENT	02 Mar 2006
DHPSE	02 Mar 2006
FRYER	02 Mar 2006
GATTON	02 Mar 2006
HML	02 Mar 2006
IPSWICH	02 Mar 2006
LAW	02 Mar 2006
LTS	02 Mar 2006
MATER	02 Mar 2006
PAH	02 Mar 2006
SSAH	02 Mar 2006
TOOWOOMBA	02 Mar 2006
Close All	16 May 2006

Figure 29 - Close Stats Form

This page controls the cut off date for entering stats for each branch. Stats that are dated before the date set will not be able to be entered. For example, if the closed date is set to 2 Mar 2006, the stats entry forms will not allow stats to be entered for any dates before 2 Mar 2006.

6 Reports

LibStats can produce reports in several categories and formats.

The categories are :

- Totals by month, quarter, semester, year
- Branches
- Time Series Reports
- Percentage Change
- Cumulative
- CAUL report

The formats are:

- Numerical listing by stats groups
- Graphs
- Export to Excel Spreadsheet

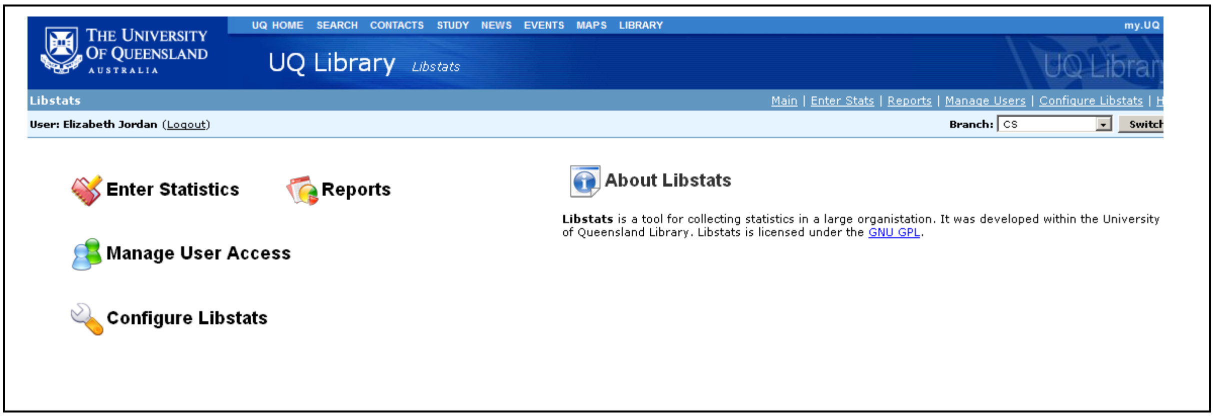


Figure 30 – Select Reports

6.1 Totals Reports

This report shows the values for each month for all statistics groups, for the whole of the library or any selected branch. It also shows totals for quarters and semesters. Once the report has been generated, it can be exported to an Excel spreadsheet, and graphs can be generated.

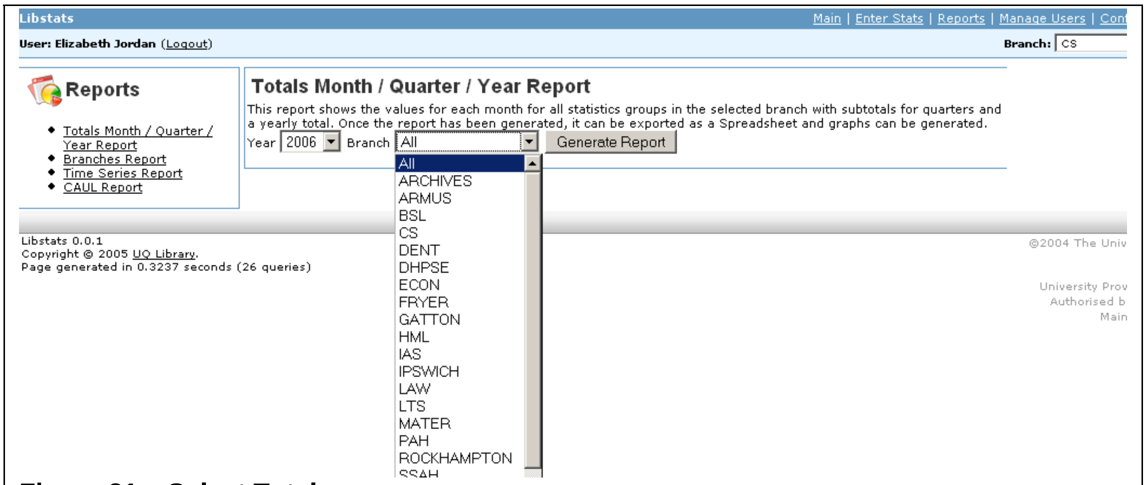


Figure 31 – Select Totals

Figure 32 – Year and One Branch selected, index shows

ual

1a. Service Staff Activity in branch top

Graph

	Checkouts (not autoLn)	Manual Loans	Renewals by staff	Holds placed by staff	Total Counts
Include in Graph:	☐	☐	☐	☐	☑
January	927	6	121	15	**1069**
February	1131	0	111	14	**1256**
March	4703	34	333	35	**5105**
1st Quarter	**6761**	**40**	**565**	**64**	**7430**
April	3949	0	263	28	**4240**
May	6167	0	360	51	**6578**
June	2770	0	312	43	**3125**
2nd Quarter	**12886**	-	**935**	**122**	**13943**
1st Semester	**19647**	**40**	**1500**	**186**	**21373**
July	1870	2	319	27	**2218**
August	4845	-	315	33	**5193**
September	-	-	-	-	-
3rd Quarter	**6715**	**2**	**634**	**60**	**7411**
October	-	-	-	-	-
November	-	-	-	-	-
December	-	-	-	-	-
4th Quarter	-	-	-	-	-
2nd Semester	**6715**	**2**	**634**	**60**	**7411**
Total	**26362**	**42**	**2134**	**246**	**28784**

1b. Customer Activity at Branch top

Graph

					Total		Percentage Autoloan

To graph this information, click on the boxes above the columns needed in the graph, and click the graph link.

Yearly Report ARMUS 2006: 1a. Service Staff Activity in branch

Note: These graphs are autogenerated and are intended as a convenience. If they do not display correctly (e.g. legend obscures part of the chart or labels run together), the data may be exported to a spreadsheet with advanced charting options [Export to Spreadsheet].

Back

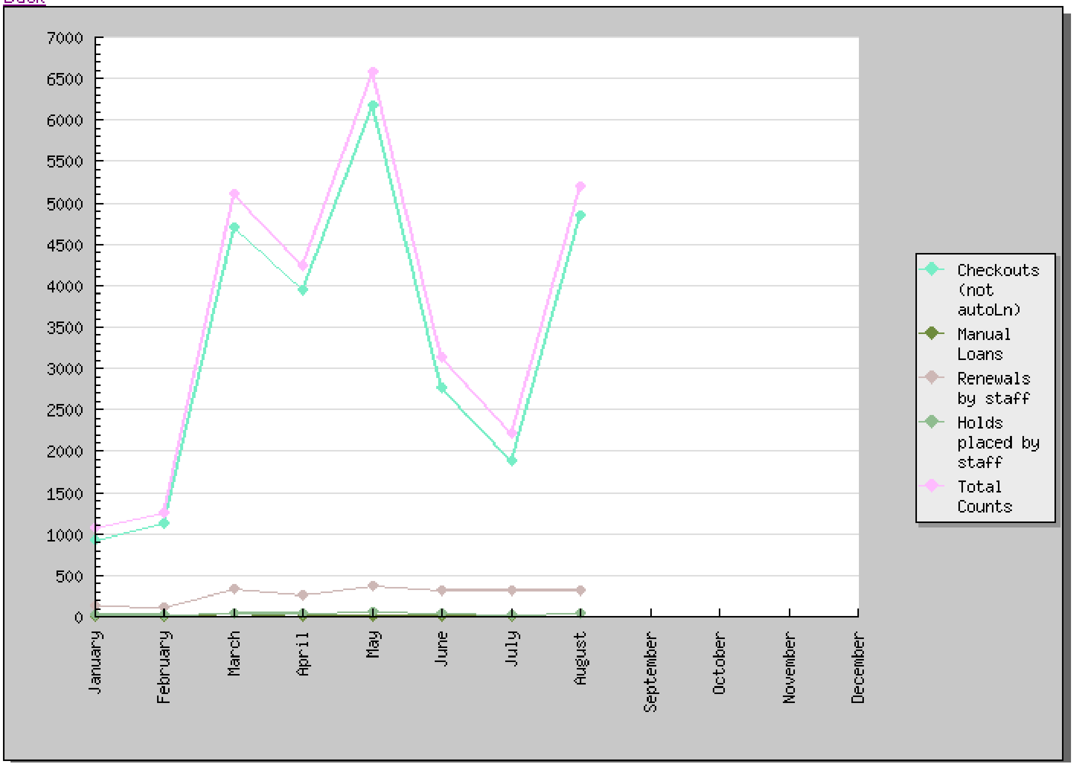


Figure 34 – Graph of Service Staff Activity in Armus Branch

6.2 Branches reports

The Branches reports produces comparative figures for requested branches for requested stats groups.

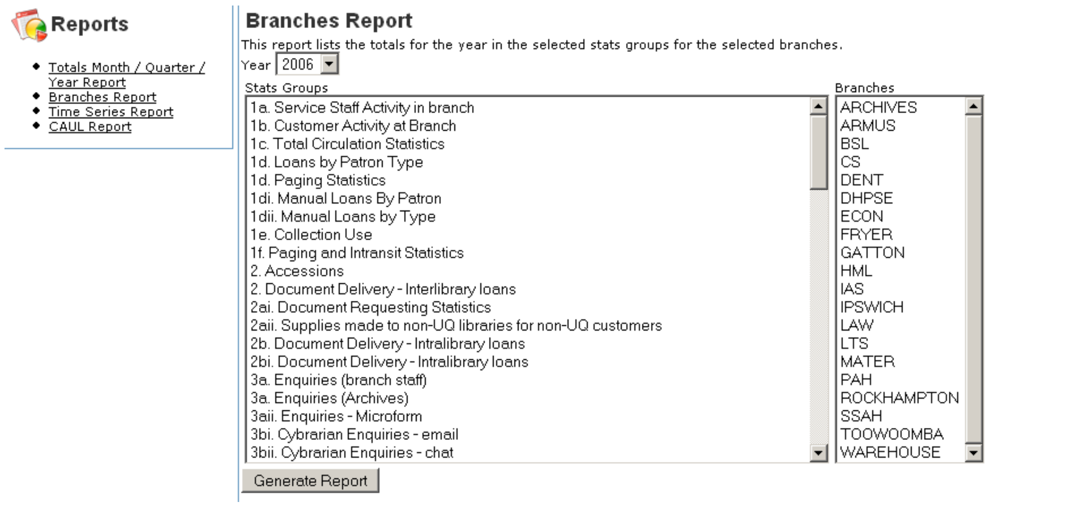


Figure 35 – Branches reports selection

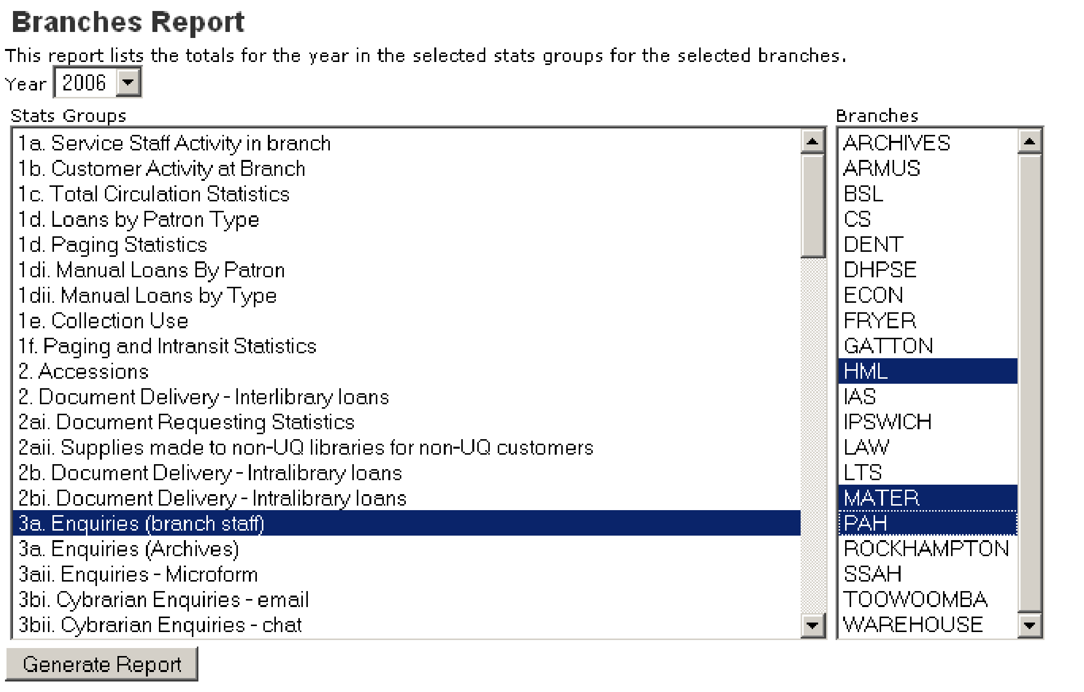


Figure 36 – Stats Group Enquiries selected, for the three hospital libraries

Branches Report: 2006

Change Report Selection

Export to Spreadsheet | Graph ☐ By Branch

	HML	MATER	PAH	Include in Graph
3a: Information Desk Long Reference	1245	222	924	☐
3a: Information Desk Short Reference	2610	2295	2121	☐
3a: Information Desk Directional	3203	1671	1959	☐
3a: Information Desk Network printing & p/c	356	26	171	☐
3a: Information Desk wkstn tech support	420	439	172	☐
3a: Total Information Desk	7834	4653	5347	☑
3a: Information Desk Special Needs (double recorded)	0	0	0	☐
3a: Lending Desk Short Reference	0	0	0	☐
3a: Lending Desk Directional	0	0	0	☐
3a: Total Lending Desk	0	0	0	☑
3a: Lending Desk wkstn tech support	0	0	0	☐
3a: Lending Desk Network printing & p/c	0	0	0	☐
3a: Lending Desk Special Needs (double recorded)	0	0	8	☐
3a: Total Shelving Staff	1112	0	0	☑
3a: Shelving Staff Directional	920	0	0	☐
3a: Total Enquiries	8946	4653	5347	☑
3a: Shelving Staff Network printing & p/c	192	0	0	☐
3a: Shelving Staff Special Needs (double recorded)	0	0	0	☐
3a: Shelving Staff Short Reference	0	0	0	☐

Figure 37 – Resultant figures for Enquiries for three hospital libraries. Note that not all categories have been selected for graphing in this example.

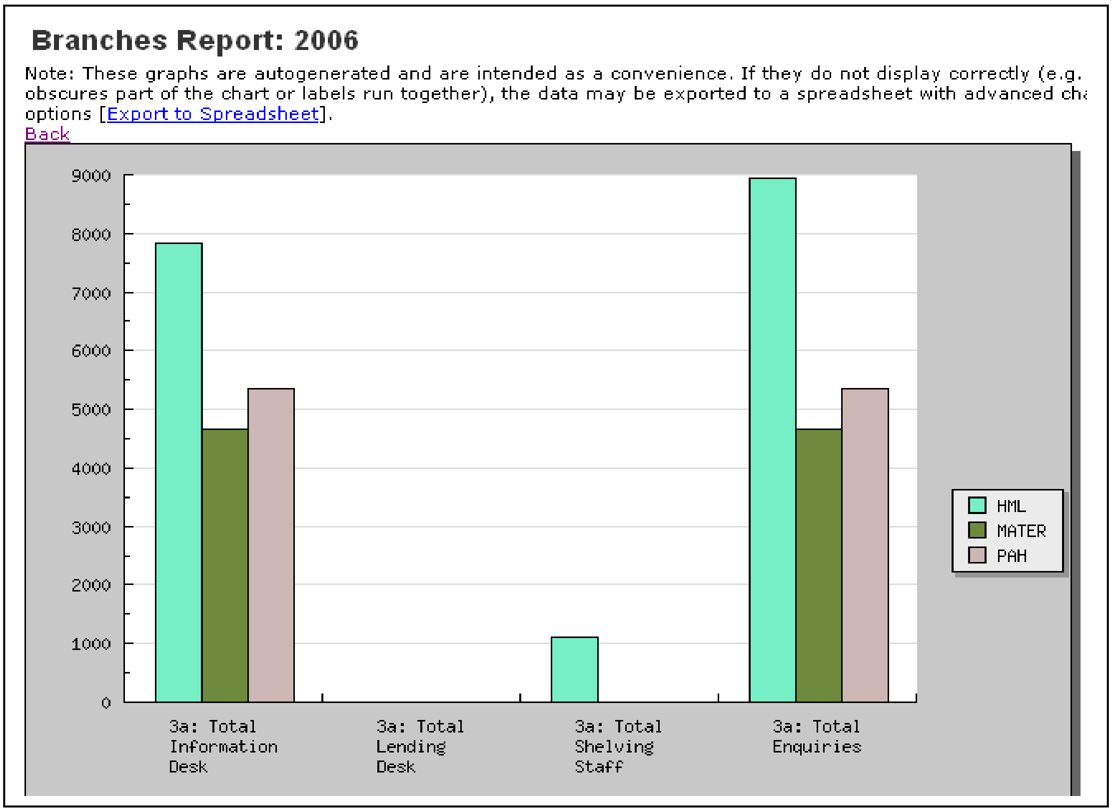


Figure 38 – Resultant graph for enquiries in the three hospital libraries

6.3 Time Series Reports

The time series reports produce tables and graphs showing, for the whole library, or for a selected branch, the variation in a stats group over a selected number of years. It is possible to select annual figures, or to compare months, quarters or semesters.

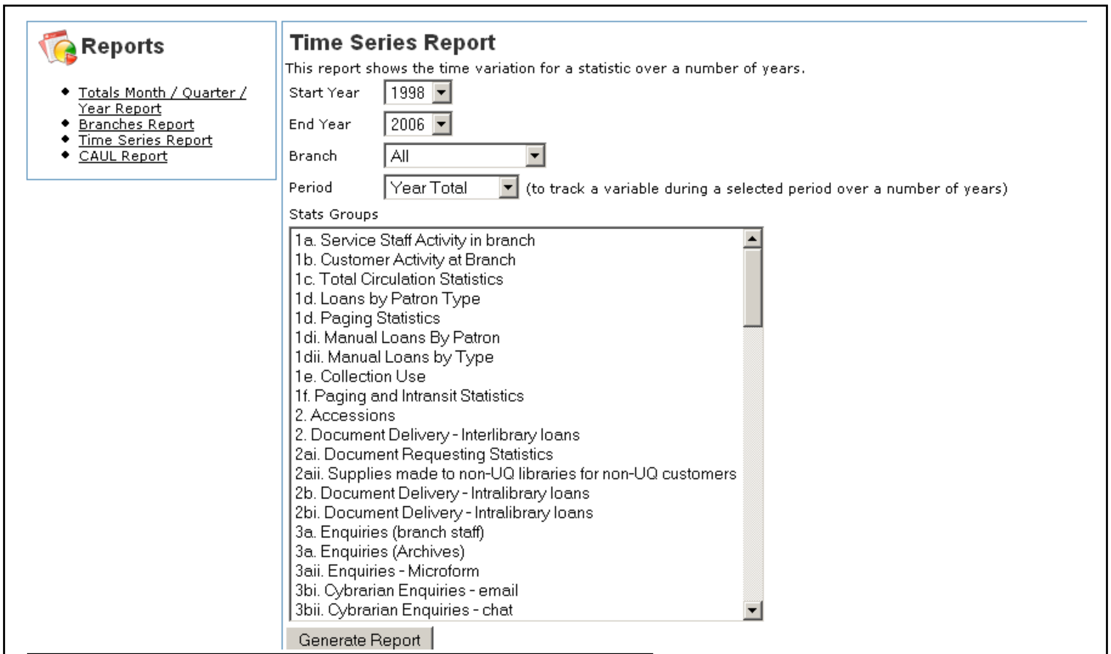


Figure 39 – Selection page for time series

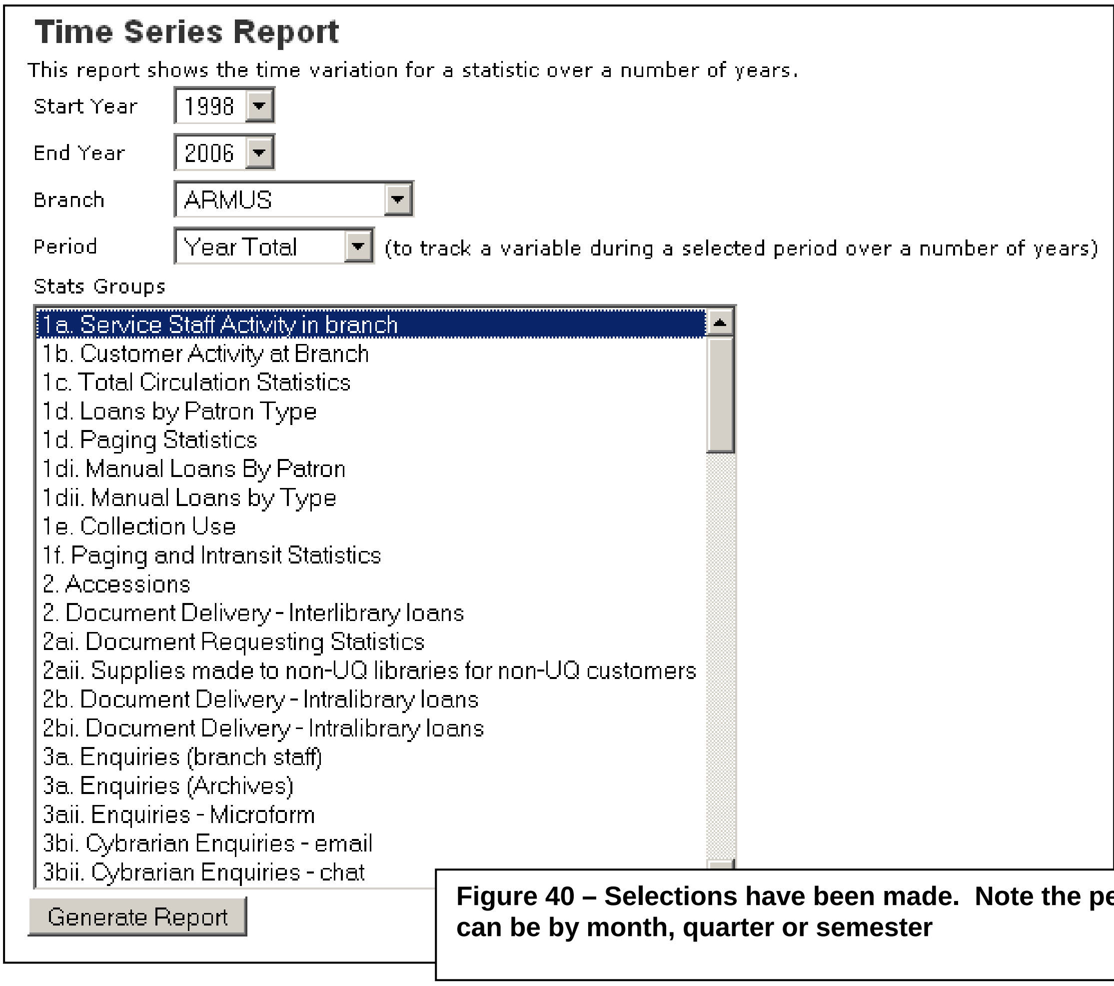


Figure 40 – Selections have been made. Note the period can be by month, quarter or semester

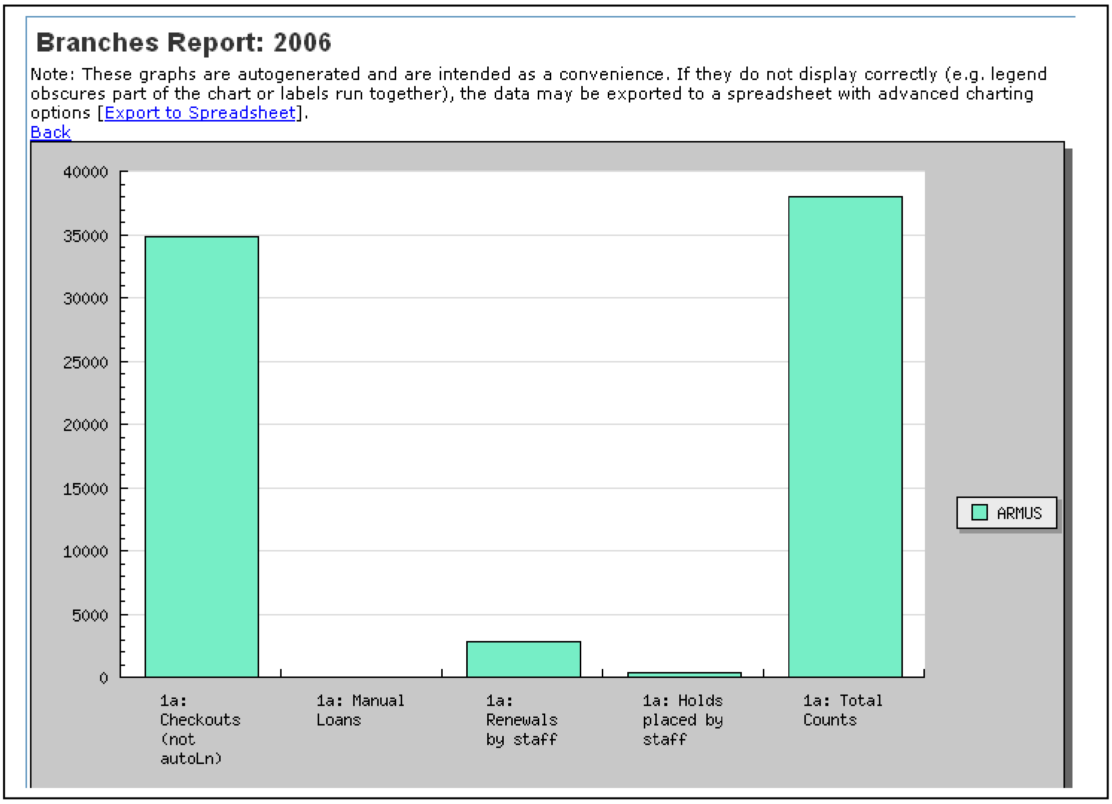


Figure 41 – Resultant graph for Armus Service staff activity 2006 to date

6.4 CAUL Reports

This report produces a listing of values that can be used to enter into the CAUL online statistics facility. The values will build progressively during the year.

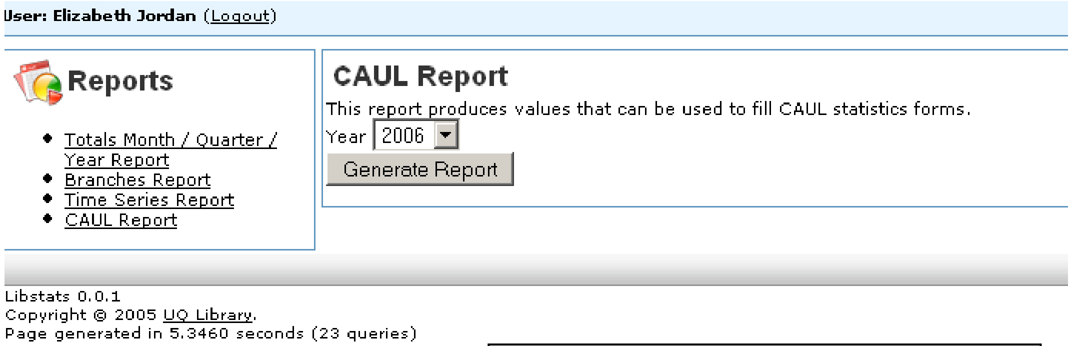


Figure 42 – CAUL report selection page

Caul Report for 2006

Change Report Selection
Export to Spreadsheet

Name	Value
Libraries: Number	13
Floor Space	-
Opening Hours	-
Seating: Total	0
Seating: Classroom	0
Shelving	na
Archives	na
Positions: Professional Library	0
Positions: Para Professional	0
Positions: Library Support	0
Positions: Other Professional	0
Positions: Other	0
Positions: Total Staff	0
Library Staff: HEW1	0
Library Staff: HEW2	0
Library Staff: HEW3	0
Library Staff: HEW4	0
Library Staff: HEW5	0
Library Staff: HEW6	0
Library Staff: HEW7	0
Library Staff: HEW8	0
Library Staff: HEW9	0
Library Staff: HEW10	0
Info Literacy: Groups	1915
Info Literacy: Persons	31519
Info Literacy: Reference Trans	38865

These figures are entered once a year, in November.

Figures which are entered through the year cumulate progressively