

cloudLibrary Monthly Rollups

cloudLibrary can now offer Libraries 2 monthly rollup reports that will give them a wealth of knowledge about their cloudLibrary activity. Customers interested in receiving the Monthly Rollup reports should email cloudsupport@bibliotheca.com and request the Monthly Rollup Reports be enabled. In the request libraries **MUST** indicate whether they would like their patron barcodes hidden or unhidden.

Monthly Rollups Process

- 1) Reports will be generated at the end of each month and will be in the Library Generated Report area of cloudLibrary Reports on the 3rd of the month.

Two reports are generated with the following naming convention.
 YYYYMM_PatronActivitySummary.txt
 YYYYMM_ContentSummary.txt

- 2) To access the reports the user will navigate to Library Generated Reports and click on the report. This will open it and display the contents of the report in the browser.



Patron Barcode	Patron Library	Activity	Activity Date	Title	Authors	ISBN	Content provider	Publisher	Format	Audience	Language	PublicationDate	Category group	Primary
Is PPU Transaction	Owning library		Expiration model type	Offered as PPU	Current PPU price	Current perpetual price	Number of copies	First purchased date	Last purchase date					
00009t	bibliotheca Test Library	Borrow	2017-01-12	100 Cupboards (100 Cupboards Book 1)	Wilson, N. D.	9780375849862	randomhouseus	randomhouse	Random House Children's Books	Ebooks	Juvenile	en		
2007-12-26	JUVENILE FICTION	Action & Adventure		Fairy Tales & Folklore	JUVENILE FICTION/Action & Adventure; JUVENILE FICTION/Fairy Tales & Folklore; JUVENILE FICTION/Fantasy & Magic									No
0.00	25.97	3	2012-04-25	2012-08-24	No	Cloud Library Demo								
nhfutht	bibliotheca Test Library	Borrow	2017-01-12	Basketball Belles	Macy, Sue	9780823424399	holidayhouse	Holiday House	Ebooks	Children	en	2012-06-14	JUVENILE	
NONFICTION	Sports & Recreation	JUVENILE NONFICTION/Sports & Recreation/Basketball					No	0.00	16.95	0	No	Cloud Library Demo		
kg9r6st	bibliotheca Test Library	Borrow	2017-01-12	Alexander Hamilton	Chernow, Ron	9781101206858	penquinus	Penquin Publishing Group	Ebooks	N/A	en	2005-03-29		
NONFICTION	BIOGRAPHY & AUTOBIOGRAPHY	HISTORY NONFICTION/BIOGRAPHY & AUTOBIOGRAPHY/Historical; NONFICTION/BIOGRAPHY & AUTOBIOGRAPHY/Political; NONFICTION/HISTORY/United States/Revolutionary Period (1775-1800)												
nk3sdt	bibliotheca Test Library	Borrow	2017-01-12	Rise to Globalism	Ambrose, Stephen E.	9781101501290	penquinus	Penquin Publishing Group	Ebooks	N/A	en	2010-12-22		
NONFICTION	HISTORY POLITICAL SCIENCE	NONFICTION/POLITICAL SCIENCE/Globalization; NONFICTION/HISTORY/United States/20th Century; NONFICTION/HISTORY/United States/21st Century												
\$7.00	1	2016-05-24	2016-05-24	No	bibliotheca Test Library									0.00
nhfutht	bibliotheca Test Library	Borrow	2017-01-12	¿Cuál es la diferencia? Una historia con restas sobre los animales en peligro de extinción.	Slade, Suzanne	9781607181064	inscribe	JUVENILE FICTION/Animals; JUVENILE FICTION/Nature & the Natural World; JUVENILE						
Arbordale Publishing	Ebooks	Children	es	2010-03-09	JUVENILE FICTION	Animals Concepts								

- 3) To save the report, right click the page and save the .txt document to your desired location.

Patron Barcode	Patron Library Activity Category1	Patron Library Activity Category2	Activity Date	Title	Authors	ISBN	Content provider	Offered as PPU	Current PPU price	Publisher	Format	Audience	Language	PublicationDate	Category group	Primary
00009t	bibliotheca Test Library	Borrow	2017-01-12	100 Cupboards (100 Cupboards Book 1)	Wilson, N. D.	9780375849862	randomhouseus	0.00	16.95	0	0	0	en	2012-06-14	JUVENILE	en
2007-12-26	JUVENILE FICTION	Action & Adventure	2012-08-24	Fairy Tales & Folklore			Cloud Library Demo								JUVENILE FICTION/Fairy Tales & Folklore; JUVENILE FICTION/Fantasy & Magic	No
0.00	23.97	3	2012-04-25													
nhfutht	bibliotheca Test Library	Borrow	2017-01-12	Basketball Belles	Macy, Sue	9780823424399	holidayhouse	0.00	16.95	0	0	en	2012-06-14	JUVENILE	en	
kg9r6st	bibliotheca Test Library	Borrow	2017-01-12	JUVENILE NONFICTION/Sports & Recreation/Basketball	Chernow, Ron	9781101200858	penguinus	0.00	16.95	0	0	en	2005-03-29	JUVENILE	en	
n3ksbt	bibliotheca Test Library	Borrow	2017-01-12	Rise to Globalism	Ambrose, Stephen E.	9781101501290	penguinus	0.00	16.95	0	0	en	2010-12-22	JUVENILE	en	
57.00	1	2016-05-24	2016-05-24													

4) This file can be uploaded to an excel document or 3rd party data tool (DOMO, orangeboj, Power BI etc.)

Opening in Excel:

1. Open Microsoft Excel and then find your file.
2. Use the Text Import Wizard to import the data:

Wizard Step 1: Click "Delimited" and then click "Next"

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

Delimited - Characters such as commas or tabs separate each field.

Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 File origin: Windows (ANSI)

My data has headers.

Preview of file C:\Users\j.greske\Downloads\201701_PatronActivity_test.txt

```

1 Patron BarcodePatron LibraryActivityActivity DateTitleAuthorsISBNCo
2 oqoox9tbibliotheca Test LibraryBorrow2017-01-12100 Cupboards (100 Cupb
3 nhfuthtbibliotheca Test LibraryBorrow2017-01-12Basketball BellesMacy,
4 kg9r6stbibliotheca Test LibraryBorrow2017-01-12Alexander HamiltonCher
5 n3ksbtlibibliotheca Test LibraryBorrow2017-01-12Rise to GlobalismAmbro

```

Cancel < Back Next > Finish

Wizard Step 2 – Leave “tab” checked and click “Next”

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab
 Semicolon
 Comma
 Space
 Other:

Treat consecutive delimiters as one

Text qualifier:

Data preview

Patron Barcode	Patron Library	Activity	Activity Date	Title
oqoox9t	bibliotheca Test Library	Borrow	2017-01-12	100 Cupboard
nhfutht	bibliotheca Test Library	Borrow	2017-01-12	Basketball B
kg9r6st	bibliotheca Test Library	Borrow	2017-01-12	Alexander Ha
n3ksb1t	bibliotheca Test Library	Borrow	2017-01-12	Rise to Glob

Buttons: Cancel, < Back, Next >, Finish

Wizard Step 3 – Click “General” and then click “Finish”

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General
 Text
 Date:
 Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Data preview

General	General	General	General	General
Patron Barcode	Patron Library	Activity	Activity Date	Title
oqoox9t	bibliotheca Test Library	Borrow	2017-01-12	100 Cupboard
nhfutht	bibliotheca Test Library	Borrow	2017-01-12	Basketball B
kg9r6st	bibliotheca Test Library	Borrow	2017-01-12	Alexander Ha
n3ksb1t	bibliotheca Test Library	Borrow	2017-01-12	Rise to Glob

Buttons: Cancel, < Back, Next >, Finish

Report Details

Patron Activity Report: This report includes transaction-level information for transactions occurring within the month in which the report was generated. This means that there is a separate line for EACH transaction, whether it be a hold, suggest, loan or PPU transaction etc. If the customer is cloudLinked, the report will contain all transactions that THEIR patrons made regardless of which library OWNS the content.

Columns included in report:

- **Patron Barcode**
- **Patron Library:** Library the patron belongs to.
- **Activity:** Example: borrow, hold, suggest
- **Activity Date:** Date of above activity
- **Title**
- **Authors**
- **ISBN**
- **Content Provider**
- **Publisher**
- **Format:** ebook/audiobook
- **Audience:** Audience if provided by content provider.
- **Language:** Language of the book.
- **Publication Date**
- **Category Group:** This is the high-level category (Fiction/Nonfiction, YA Fiction/nonfiction, etc.)
- **Primary Category1:** Primary category the provider assigned
- **Primary Category2:** Second top level category the provider has assigned
- **Categories:** Other categories a content provider has assigned
- **Expiration Model type:** ByDate/ Bycheckouts or both
- **Offered as PPU:** Is the title in this transaction offered as a PPU title? Y/N
- **Current PPU Price:** If offered as PPU, this is the current price.
- **Current Perpetual price:** If offered as perpetual/ownership model, this is the current price. **Number of copies:** Number of copies owned by the owning library
- **First Purchased date:** Date of the FIRST purchase of this content by the OWNING library
- **Last Purchased date:** Date of the LAST purchase of this content by the OWNING library
- **Is PPU Transaction:** Denotes if the transaction is on a PPU title. N/A is for suggests
- **Owning library:** Which library owns the content being acted upon?

Content Summary Report: This report includes cumulative/summarized data by title for the owning library within the month of the generated report. This means that each title in their collection will be included in the report regardless of if there was activity on the title or not. If the customer is cloudLinked, this report will show all transactions on a title regardless of which patrons acted on them.

(continued below)

Columns included in the report:

- **Title**
- **Authors**
- **ISBN**
- **Content Provider**
- **Publisher**
- **Format:** ebook/audiobook
- **Audience:** Audience if provided by content provider.
- **Language:** Language of the book.
- **Publication Date**
- **Category Group:** This is the high-level category (Fiction/Nonfiction, YA Fiction/nonfiction, etc.)
- **Primary Category1:** Primary category the provider assigned
- **Primary Category2:** Second top level category the provider has assigned
- **Categories:** Other categories a content provider has assigned
- **Expiration Model type:** ByDate/ Bycheckouts or both
- **Offered as PPU:** Is the title in this transaction offered as a PPU title? Y/N
- **Current PPU Price:** If offered as PPU, this is the current price.
- **Current Perpetual price:** If offered as perpetual/ownership model, this is the current price. **Number of copies:** Number of copies owned by the owning library
- **First Purchased date:** Date of the FIRST purchase of this content by the OWNING library
- **Last Purchased date:** Date of the LAST purchase of this content by the OWNING library
- **Holds:** Holds that occurred on the title within the month of the report.
- **Loans:** Loans that occurred on the title within the month of the report.
- **Suggestions:** Suggestions that occurred on the title within the month of the report.
- **Owning Library:** Name of library that owns the title.