

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 <u>cloudsupport@bibliotheca.com</u> 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.

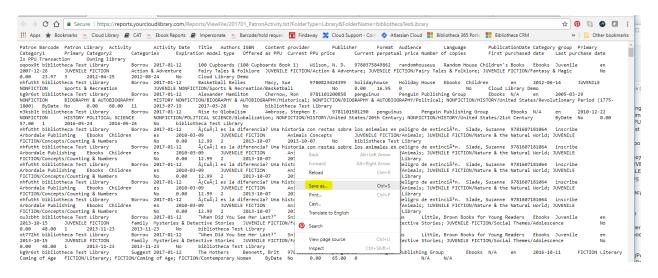
Two reports are generated with the following naming convention. YYYYMM_PatronActivitySummary.txt YYYYMM_ContentSummary.txt

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.



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

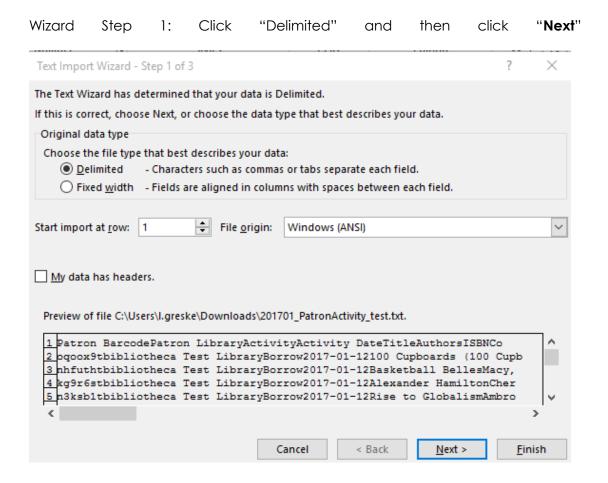




4) This file can be uploaded to an excel document or 3rd party data tool (DOMO, orangeboy, Power BI etc.)

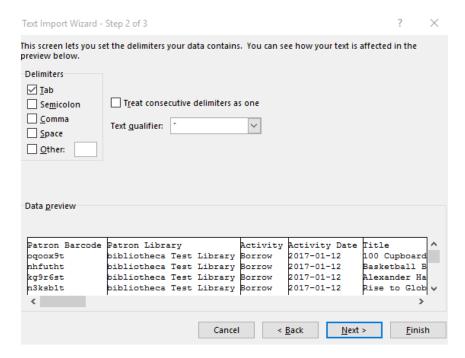
Opening in Excel:

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

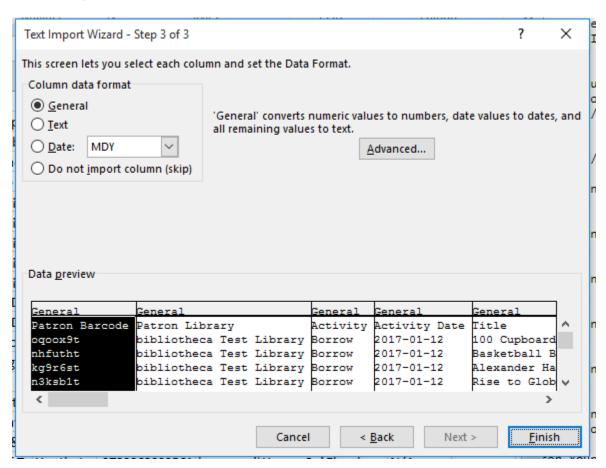




Wizard Step 2 - Leave "tab" checked and click "Next"



Wizard Step 3 - Click "General" and then click "Finish"





Report Details

<u>Patron Activity Report:</u> 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 <u>FIRST</u> purchase of this content by the OWNING library
- **Last Purchased date:** Date of the <u>LAST</u> 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?

<u>Content Summary Report:</u> 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 <u>FIRST</u> purchase of this content by the OWNING library
- Last Purchased date: Date of the <u>LAST</u> 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.