**Functional area standard reports to be delivered prior to demo day**

[I would like to review these against RFP responses to see what will have already been supplied or answered. Md11/18]

**Standard reports to be provided to all attendees on the day of demonstration.  Deliverable must include the following for each report:**

* + Search strategy and functional module(s) used to generate the report
  + Screen capture or similar illustration of data or report as displayed in the system’s reporting interface
  + Raw data as exported (e.g. plain text, CSV, or TSV file; XML)
  + Example of final report (spreadsheet, document, or PDF; tables or charts derived from the data)
  + It should be clear how the report can be run by service point, individual library or systemwide

**Circulation/Resource Sharing Reports**

Checkouts and Renewals

* + Patrons x Items
  + Patrons x Call Number
  + Patrons x Locations
  + Trends by hours, locations, other
* In House Use Statistics
* Request Statistics  - number of requests
* Resource Sharing Statistics – Requests, Fulfillments, Cancellation, Fill rate
* Patron stats – number of patrons, number of items checked out, number of billed items
* Activity by patron type, major, year
* Item stats - snapshot of number of items checked out
* Filled Hold – number of filled holds
* Booking Statistics
* Fine reports separated by patron type
* Capabilities to track in-house use at the item level and what statistical reports can be generated from this data.
* What item information is retained at the item level such as total checkouts, total renewals, in house use, year-to-date checkouts and last-year-to-date checkouts. How are year-to-date and last year to date updated?
* Historical circulation statistics
* Infographic showing circulation counts by item type and location. Interested in seeing circulation of materials on reserve as a percentage of overall circulation.

**Acquisitions**

* Vendor performance—time between order and receipt
* ERM problem tracking and resolution
* Create an annual collection development report that includes the number of items added and their formats (e.g., digital / print), number of orders received and paid, number of gifts added, number of titles/volumes withdrawn
* Annual and prior year budget reports
* multi-fund orders and payments made
* fund activity history report
* fiscal close (annual financial reporting)
* monthly payment reports to reconcile with campus accounting
* annual subscription price increases
* monthly summaries of activity (# items cataloged, processed, repaired, etc.;
* detailed spend for monographic firm orders over a 3 year period. The report should be grouped by fund code and list individual titles purchased
* infographic demonstrating spend by monographic fund code as a percentage of overall spend for a one-year period
* infographic demonstrating circulation of monographs purchased by fund code

**Cataloging**

* annual counts of gifts, purchases and govt docs added,
* Headings and data duplication
* sample .mrc file of MARC21 bibliographic records including holdings data (either embedded in the bibliographic record or as separate MARC21 holdings)

**ERM**

* Usage reports for all electronic resources, including digital objects. Reports should cover use of content as well as searches of content
* SUSHI status reports for data collection – MIGHT BE COVERED BY RFP responses
* Missing COUNTER data - MIGHT BE COVERED BY RFP responses
* Link resolver activity, including failures
* Report of licensing terms for ILL/Resource Sharing
* Link resolver usage data is important to show us how patrons discover and access our full text resources.
  + Demonstrate how to generate a report containing link resolver usage data, by title, for at least one full academic term.

**Reserves**

* E Reserves Usage statistics
* Print reserves usage
* Reserves pull reports

**Collection Development**

* expenditures by fund, by call#/subject,
* overlap analysis for packages,
* overlap analysis of packages to current physical holdings,
* usage comparison by subject area for ebooks vs print monographs, etc.;

**Collection Management**

* age of collection reports,
* usage stats for all item types,
* items withdrawn by format and call number/subject area
* Inventory reports (items with wrong locations, status)

**Discovery**

* search trends,
* facet and tag trends,
* unique visits,
* referring pages,

**Other**

* Accreditation reports,
* Program Review Reports