ACRL/IPEDS Title, Volume, and Circulation Counts in Alma Analytics

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Overview

- This presentation will focus on
  - IPEDS Data Collection System Survey Materials Instructions: Section I
  - ACRL Annual Survey Instructions and Definitions: Library Collections, lines 40-43
- We will discuss physical title counts, physical volume counts, physical circulation counts, and electronic title counts

Survey Timeline

- ACRL
  - Opens in October; closes in February
- IPEDS
  - Opens in December; closes in April
- Analytics reports for ACRL statistics can also be used for IPEDS unless otherwise noted
- Report the totals held at the **end** of the previous fiscal year

PHYSICAL REPORTS

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Caveats

- Your reports may differ from those shown here depending on your local cataloging practices
- Ex Libris-defined resource types and bib material types are subject to updates; any changes will be noted in the release schedule
- If you use item material type in your reports:
  - Make sure they are accurate
    - During migration, some records may have gotten mapped to "Material Type (not listed)" - see instructions here to fix
  - Be prepared for the possibility of more complicated filtering
   - Alma uses many more item material types than bib material types

General Tips

- Use the Physical Items subject area rather than the Titles subject area
  - Physical Items is updated daily, whereas Titles is updated monthly
  - You can use location filters in Physical Items, but not in Titles
    - These filters will give you more choices in excluding brief bibs from your title count (e.g., ILL, Reserves, etc.)
- Run all title count reports on July 1, and export/save the spreadsheets in a safe location
  - We cannot use bibliographic creation date as a filter in these reports, since in most cases GIL institutions attach their holdings to an existing NZ record rather than creating a new one

A Note About Material Type

There are two fields called 'Material Type' in the Physical Items subject area:

- The field for bib records is stored in the 'Bibliographic Details' folder
- The field for item records is stored in the 'Physical Item Details' folder
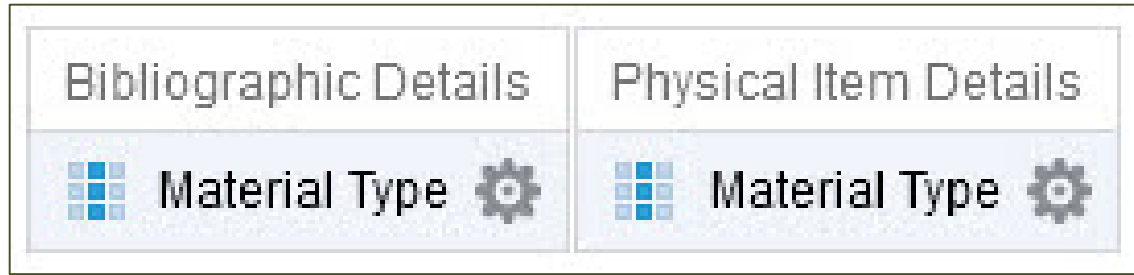
To distinguish between them, this presentation will refer to "bib material type" and "item material type."

THE BASIS OF ACRL/IPEDS REPORTING: DATA ELEMENTS IN ANALYTICS

Commonly Used Fields in ACRL/IPEDS Reports

	Material Type (Bibliographic)	Resource Type (Bibliographic)	Material Type (Item)	Item Policy (Item)
Defined by	Ex Libris, based on bib LDR/06, LDR/07, and 007/00	Ex Libris, based on bib LDR and 008	Ex Libris	Your institution
Institution control	None	None	Enable/disable	Add/delete; enable/disable
Suggested use	Primary filter	Secondary filter	As a filter to exclude resources	As a filter to exclude resources

Bibliographic Material Type

- 7 options: Books, Journals, Computer files, Maps, Music Records, Visual materials, and Mixed materials
- Defined by Ex Libris based on MARC21 codes used in these fields:
  - LDR position 6 (Type of record)
  - LDR position 7 (Bibliographic level)
  - 007 position 00 (Category of material)
- Roughly correspond to the types of resources specified in ACRL instructions

Sources for Bibliographic Material Type

LDR/06 (Type of Record)	LDR/07 (Bibliographic Level)	007/00 (Category of Material)
• language material • notated music • cartographic material • projected medium • nonmusical sound recording • musical sound recording • 2D nonprojectable graphic • computer file • kit • mixed materials • 3D artifact • manuscript language material	• monographic component part • serial component part • collection • subunit • integrating resource • monograph/item • serial	• map • electronic resource • globe • tactile material • projected graphic • microform • nonprojected graphic • motion picture • kit • notated music • remote-sensing image • sound recording • text • videorecording • unspecified

Resource Type

- 58 options, including 18 electronic and 23 physical
- Like bib material type this field is defined by Ex Libris based on [MARC21 codes](#) used in the Leader, but it also incorporates the 008, which contains data elements positionally defined by type of material
- More detailed than bib material type; use when you need more granularity
- In some cases resource types are defined by content rather than form; therefore:
  - An atlas is defined as a map, not a book
  - Atlas microforms are defined as maps, not microforms
  - A Braille book is a book, and Braille music is music
  - A cartographic manuscript is a map, and a music manuscript is music (only a text manuscript is defined as a book)

Bib Material Type vs. Resource Type

- A bib record can have only one bib material type and one resource type assigned to it
  - Most bib material types are associated with more than one resource type
  - Only a few resource types (Manuscripts - Physical, Undefined, and Microforms) are associated with more than one bib material type
  - If a bib meets conditions of more than one resource type, only the first one in the resource type mapping table is applied
- UWG's reports specify both the bib material type and resource type for a given ACRL category

Item Material Type vs. Item Policy

- Unlike item material types, item policies are defined by your library and can be added or deleted as needed
- Run a report to see which field would be more useful for your institution's volume and circ count reports
- Tip: Use item material type if possible, as these are fixed codes in Alma

Item Material Type vs. Item Policy

Loans (Not In House)	Location Name	Material Type	Item Policy
11	Reserves	Book	.Book
89			2 Hour Course Reserve
5			3 Hour Course Reserve
27			Key
93		Calculator	Calculator
3		DVD	1 Day Course Reserve
1			3 Hour Course Reserve
12			Videorecording
2		Equipment	DVD players for student laptops
1		Issue	4 Hour Course Reserve
0		Key-Study Room	None
296		Laptop	Laptop Computer
3			Library Staff Laptop
151		None	Key

REPORT PREPARATION

Report Strategy Step 1: Collect

- Use the bib material type [definitions](#) to map the resources specified in the ACRL instructions to Analytics
  - Example: in the ACRL Physical Books title count, you only need to include the Book and Music bib material types.
- Run the report with the resource type field to see which resource types are associated with those bib material types

Report Strategy Step 2: Refine & Exclude

- Use the resource type [definitions](#) to map in a more granular way, further refining your report according to the ACRL instructions
  - Example: ACRL counts sound recordings under "Physical Media" and music scores under "Physical Books." Since both use the Music bib material type, the only way to separate them in reports is to filter on resource type.
- For circ count: Use item material type (or item policy) to exclude equipment and other resources not required in the ACRL count

Report Strategy Step 3: Final Check

- For all reports, use location to exclude broad classes of items (these codes will vary at your institution)

Category of item in ACRL/IPEDS instructions	UWG Example: "Location"."Location Name" is not equal to / is not in
uncataloged items	Acquisitions; reserves; short loan
owned or leased	ILL; ILL non-circulating; lending resource sharing requests; borrowing resource sharing requests
physical book titles	Boundwith; membership; serials department

Basic Report Fields: Physical Titles

Physical Items subject area (export this report on July 1)

- Count on MMS ID:
  - Add "Bibliographic Details"."MMS Id" and edit formula: COUNT(DISTINCT "Bibliographic Details"."MMS Id")
- Add these filters:
  - "Bibliographic Details"."Bibliographic Lifecycle" is equal to / is in **In Repository**
  - "Bibliographic Details"."Suppressed From Discovery" is equal to / is in **No**

Basic Report Fields: Physical Volumes

Physical Items subject area (run this report any time)

- "Physical Item Details"."Num of Items (In Repository)"
- Add these filters:
  - "Bibliographic Details"."Suppressed From Discovery" is equal to / is in **No**
  - "Physical Item Details"."Lifecycle" is equal to / is in **Active**
  - "Item Creation Date"."Item Creation Date" is less than **[first day of fiscal year, e.g., 07/01/2021]**

Basic Report Fields: Total Physical Circulation

Fulfillment subject area (run this report any time)

- "Loan"."Loans (Not In House)"
- "Item Location at time of loan"."Location Name"
- "Loan Date"."Loan Fiscal Year"
  - If your library's Alma-defined fiscal year doesn't match up with ACRL's specified date range, use this filter instead: "Loan"."Loan Date" between [date 1] and [date 2]

To ensure the most accurate circulation count for your report, do not use the Lifecycle filter.

REPORT EXAMPLES

Physical Books

ACRL Line 40, column A; IPEDS Section I [A]

- Report physical book titles owned or leased by the library if individual titles are cataloged and/or searchable through the library catalog or discovery system.
- Exclude serials, microforms, maps, nonprint materials, and uncatalogued items.
- Include music scores if searchable by title through the library catalog or discovery system.
- Include government documents that are accessible through the library's catalogs regardless of whether they are separately classified and/or shelved.
  - *Cataloged* includes documents for which records are provided by the library or downloaded from other sources into the library's card or online catalogs or discovery system.

Additional guidance from ACRL:

- Government documents include local, state, regional, federal, and international.
- Include open access titles if the individual titles are searchable through the library's catalog or discovery system.

Physical Books: Analytics Mapping

ACRL/IPEDS instructions	Bibliographic Details.Material Type	Bibliographic Details.Resource Type
Books	Book	Book – Physical, Braille Book – Physical, Collection, Manuscripts – Physical
Music scores	Music	Notated music – Physical, Manuscripts – Physical
Government documents	Book	Book – Physical, Braille Book – Physical, Collection, Manuscripts – Physical

Physical Books: Final Report

Bibliographic Details

Number of Titles ⚙

Subject area: Physical Items

⊿ **Filters**

Bibliographic Lifecycle is equal to / is in In Repository

AND Material Type is equal to / is in Book; Music

AND Resource Type is equal to / is in Book - Physical; Braille Book - Physical; Collection; Manuscripts - Physical; Notated music - Physical

AND Location Name is not equal to / is not in 3 Days Course Reserves; 3 Hour Course Reserves; 7 Days Course Reserves; Storage; Withdrawn; 10 Hour Keys; 2 Hour Course Reserves; 4 Hour Course Reserves; Acquisitions; Borrowing Resource Sharing Requests; Boundwith; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; Newnan; None; Reserves; Self Check; Serials Department; Short Loan; UWGOnline Reserves

AND Suppressed From Discovery is equal to / is in No

Number of Titles
355,120

Physical Books (Volumes)

ACRL Line 40a, column A (not required for IPEDS)

- If available, report the number of volumes using the ANSI/NISO Z39.7-2013 (section 4) definition for volume: "A single physical unit in any printed, typewritten, handwritten, mimeographed, or processed work, distinguished from other units by a separate binding, encasement, portfolio, or other clear distinction, which has been cataloged, classified, and made ready for use, and which is typically the unit used to charge circulation transactions. Either a serial volume is bound, or it comprises the issues that would be bound together If the library bound all serials."

- Include duplicate copies, bound serial volumes, and music scores.

- For the purposes of the ACRL survey, unclassified bound serials arranged in alphabetical order are considered classified.

- Include all government document volumes if individual titles are searchable through the library's catalog or discovery system regardless of what they are shelved separately. The term "classified" includes documents arranged by SuDoc, CODOC, or similar numbers.

- Exclude microfilms, maps, nonprint materials, and uncataloged items.

Physical Books (Volumes): Analytics Mapping

ACRL/IPEDS instructions	Bibliographic Details. Material Type	Bibliographic Details.Resource Type
Books	Book	N/A, as the bib material types are sufficient. In this report, rather than filtering to include each corresponding resource type, it is easier to exclude the few resource types that are not required by the ACRL instructions.
Music scores	Music	
Government documents	Book	
Serials	Journal	
Exclude microfilms, maps, nonprint materials, and uncataloged items		**Exclude:** Audio musical - Physical, Audio nonmusical - Physical, Audio nonmusical – Component Part, Microforms

Physical Books (Volumes): Final Report

Physical Item Details	Bibliographic Details	
Num of Items (In Repository) ⚙	Material Type ⚙	Resource Type ⚙

Subject area: Physical Items

▵ **Filters**

▼ Bibliographic Lifecycle is equal to / is in In Repository
AND ▼ Lifecycle is equal to / is in Active
AND ▼ Material Type is equal to / is in Book; Journal; Music
AND ▼ Location Name is not equal to / is not in 3 Days Course Reserves; 3 Hour Course Reserves; 7 Days Course Reserves; Storage; Withdrawn; 10 Hour Keys; 2 Hour Course Reserves; 4 Hour Course Reserves; Acquisitions; Borrowing Resource Sharing Requests; Boundwith; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; Newnan; None; Reserves; Self Check; Serials Department; Short Loan; UWGOnline Reserves
AND ▼ Suppressed From Discovery is equal to / is in No
AND ▼ Resource Type is not equal to / is not in Audio musical - Physical; Audio nonmusical - Physical; Audio nonmusical — Component Part; Microforms
AND ▼ Item Creation Date is less than 07/01/2021

Num of Items (In Repository)
452,365

Physical Serials

ACRL Line 43, column A; IPEDS Section I [C]

- Report the number of physical serial titles that are accessible through the library's catalog or discovery system. A serial is a publication in any medium issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This definition includes, in any physical format, periodicals, serial titles on microform, newspapers, and annuals (reports, yearbooks, etc.); the journals, memoirs, proceedings, transactions, etc. of societies; and numbered monographic series.

- Report serial titles, not subscriptions.

- If possible, report the count of only those de-duplicated or otherwise unique serial titles searchable through the library's catalog or discovery system.

- If possible, do not include earlier title changes; however, do not worry about removing them if it is not possible/feasible.

Physical Serials: Analytics Mapping

ACRL/IPEDS instructions	Material Type (bib)	Resource Type
Periodicals	Journal	Braille serial – Physical, Journal – Physical, Serial component part - Physical
Serial titles on microform	Journal	Microforms
Newspapers	Journal	Newspaper (Ceased publication) – Physical, Newspaper – Physical
Annuals	Journal	Other serial (Ceased publication) – Physical, Other serial – Physical
Numbered monographic series	Journal	Other serial (Ceased publication) – Physical, Other serial – Physical

Physical Serials: Final Report

Bibliographic Details

Number of Titles ⚙

Filters

Bibliographic Lifecycle is equal to / is in In Repository

AND Suppressed From Discovery is equal to / is in No

AND Material Type is equal to / is in Journal

AND Resource Type is equal to / is in Braille Serial - Physical; Journal (Ceased publication) - Physical; Journal - Physical; Microforms; Newspaper (Ceased publication) - Physical; Newspaper - Physical; Other Serial (Ceased publication) - Physical; Other Serial - Physical; Serial component part - Physical

AND Location Name is not equal to / is not in 3 Days Course Reserves; 3 Hour Course Reserves; 7 Days Course Reserves; Storage; Withdrawn; 10 Hour Keys; 2 Hour Course Reserves; 4 Hour Course Reserves; Acquisitions; Borrowing Resource Sharing Requests; Boundwith; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; Newnan; None; Reserves; Self Check; Serials Department; Short Loan; UWGOnline Reserves

Number of Titles
6,781

Physical Media

ACRL Line 42, column A; IPEDS Section I [B]

- Report the number of titles of media materials.
- Include microforms, audiovisual materials, cartographic, graphic materials, and three-dimensional artifacts and realia.

Exclude microform serials from this count, as they are counted under Physical Serials.

Physical Media: Analytics Mapping

ACRL/IPEDS instructions	Bibliographic Details.Material Type	Bibliographic Details.Resource Type
Microforms	Book, Computer File, Mixed material, Music, Visual material	Microforms
Graphic materials	Visual Material	2D non-projectable graphic – Physical, 2D non-projectable graphic – Component part
Audiovisual materials	Music, Visual Material	Audio musical – Physical, Audio nonmusical – Physical, Audio nonmusical – Component part, Braille Music – Physical, Manuscripts – Physical, Music – Component part, Projected media – Component part, Projected medium – Component part

Physical Media: Analytics Mapping (continued)

ACRL/IPEDS instructions	Bibliographic Details. Material Type	Bibliographic Details.Resource Type
3D artifacts/ realia	Visual Material	3D artifact – Physical, 3D artifact – Component part, Kit – Physical, Kit – Component part
Cartographic materials	Map	Atlas – Physical, Atlas – Microfilm*, Atlas – Microfiche*, Atlas – Microopaque*, Braille Map – Physical, Map – Physical, Map – Component part, Map – Microfiche, Map – Microfilm, Map – Microopaque, Manuscript – Component part**, Manuscripts – Physical

*These resource types were previously not supported for serials and monograph records (LDR/007=s,m), but the issue was fixed in the March 2022 release. These resources types for existing records will be recalculated during the May 2022 semi-annual indexing.

**This resource type is defined only for cartographical manuscripts–as opposed to the 'Manuscripts - Physical' resource type, which is defined for music, text, and cartographic resources.

Physical Media: Final Report

Bibliographic Details

▤ Number of Titles ⚙

Subject area: Physical Items

◢ **Filters**

▼ Bibliographic Lifecycle is equal to / is in In Repository

AND ▼ Suppressed From Discovery is equal to / is in No

AND ▼ Material Type is equal to / is in Book; Computer file; Map; Mixed material; Music; Visual material

AND ▼ Resource Type is equal to / is in Digital File - Data; Digital File - Text; Digital File - Video; 2D non-projectable graphic - Physical; 2D non-projectable graphic – Component Part; 3D artifact - Physical; 3D artifact – Component Part; Atlas - Physical; Audio musical - Physical; Audio nonmusical - Physical; Audio nonmusical – Component Part; Braille Map - Physical; Braille Music - Physical; Digital File - Audio; Digital File - Image; Kit - Physical; Kit – Component Part; Manuscript – Component Part; Map - Microfiche; Map - Microfilm; Map - Microopaque; Map - Physical; Map – Component Part; Microforms; Music – Component Part; Projected media – Component Part; Projected medium - Physical; Manuscripts - Physical

AND ▼ Location Name is not equal to / is not in 3 Days Course Reserves; 3 Hour Course Reserves; 7 Days Course Reserves; Storage; Withdrawn; 10 Hour Keys; 2 Hour Course Reserves; 4 Hour Course Reserves; Acquisitions; Borrowing Resource Sharing Requests; Boundwith; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; Newnan; None; Reserves; Self Check; Serials Department; Short Loan; UWGOnline Reserves

Number of Titles
15,184

Total Physical Circulation

ACRL Line 60, Column A; IPEDS Section I [E]

- Report the total number of times physical items are checked out from the general and reserve collections. Include only initial checkouts (circulations), not renewals. Exclude interlibrary loan lending and borrowing.
- Include transactions of books, media, and serials. Do not include transactions of equipment or computers. However, circulation of electronic reading devices (e.g., Kindles) can be included if the device is pre-loaded with e-books.
  - For example, if a customer checks out a Kindle that is pre-loaded with 20 e-books, then that transaction counts as 1 physical circulation, not 20 electronic/digital circulations.
- Do not include in-house circulation (items that library personnel pick up from tables and carrels and then scan to track in-house use) with circulation.

Total Physical Circulation: Analytics Mapping

ACRL/IPEDS instructions	Recommended Analytics field/filter (Fulfillment subject area)
Exclude in-house circulations	"Loan"."Loans (Not In House)"
Exclude ILL lending and borrowing	"Item Location at time of loan"."Location Name" is not equal to / is not in **[your library's ILL locations]**
Exclude transactions of equipment or computers	● "Physical Item Details"."Material Type" ● "Physical Item Details"."Item Policy" ● "Location"."Location Name"

Total Physical Circulation:
A Note About Item Material Type

- If you prefer to uses item material type to exclude circulations of equipment and computers, there are two fields with this name in the Fulfillment subject area:
  - "Physical Item Details"."Material Type" uses the item material type description **(recommended)**
  - "Loan Details"."Material Type" uses the item material type code

Loan Details	Physical Item Details
▦ Material Type ⚙	▦ Material Type ⚙
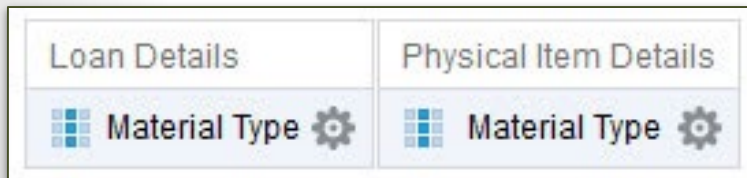
Title	Material Type	Material Type
Canon PowerShot Digital Camera		None
Coby Headphones no. 5	OTHER	Headphones
USB-C Wall Charger	EQUIP	Equipment

Total Physical Circulation: Final Report

Loan

| Loans (Not In House) ⚙ |

Subject area: Fulfillment

▲ **Filters**

🔻 Loan Fiscal Year is equal to / is in FY-2021

AND 🔻 Location Name is not equal to / is not in ILL; ILL Non-Circulating

AND 🔻 Item Policy is not equal to / is not in Calculator; DVD Player; DVD players for student laptops; Dry Erase Markers; Fellowes Space Heater; Headphones; Headphones Splitter; ILL Box Loan; ILL Home Loan; ILL Internal loan; ILL Loan - Post graduates; ILL Non-Circulating; ILL Pickup; ILL Reading Room; Interlibrary Loan Item; Key; Key-Study Room; Laptop Computer; Library Staff Laptop; Markers; Scanner

Loans (Not In House) 🔻
3,685

Summary and Tips: Physical Title Reports

- If possible, ensure accuracy of your item material types to give you more control in reporting
- Prepare your reports as early as possible so you're not rushed and have time to ask questions
- Use the Physical Items subject area rather than Titles
- Use resource type filters to supplement and refine your material type filters
- Export and save your title reports on July 1

ELECTRONIC REPORTS

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Electronic/Digital Items

- 40, 42, 43 Column B
- Numbers will vary day-to-day because collection content fluctuates
- Use NZ Analytics to retrieve IZ- *and* NZ-managed electronic titles
  - Your institutional Analytics will only report IZ-managed collections
    - If you need NZ Analytics login credentials, ask your supervisor or submit a GIL ticket
    - You will see the GIL logo in the top left-hand corner instead of your institution's logo

Electronic/Digital Items
40, 42, 43 Column B

Three options for electronic books, media, serials:
- An advanced search in Alma
  - Not covered in this presentation
  - Double-check that your set excludes inaccessible titles belonging to other GIL institutions.
- An Analytics report run in the network zone (not in your institution's instance)
  - Title subject area
    - Updated every 30 days rather than nightly
    - End-of-fiscal-year data available sometime in July
  - If you need to exclude an electronic collection, then you will have to use the E-Inventory subject area
    - It's more complicated to count titles (directions below)
    - End-of-fiscal-year data available July 1

Electronic/Digital Items

- Be sure to *refresh your Alma tab* while working in Analytics. If at any time you receive obviously strange results, close out and log back in again.
- Reports may take longer to run in the Network Zone.
- FYI: Cannot use folder titled "Portfolio Details for Consortia Members" because the needed qualifiers are unavailable.
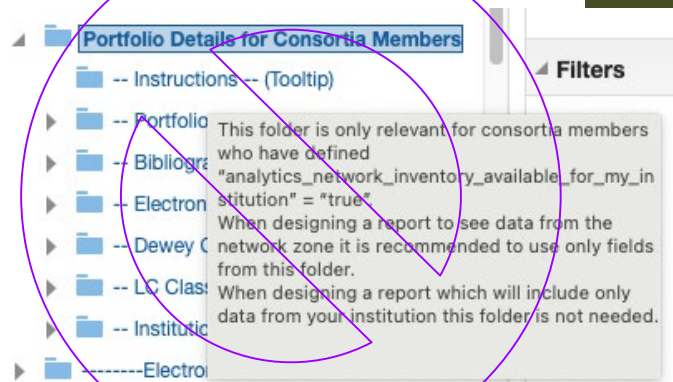
Digital/Electronic Books 40.B

ACRL/IPEDS instructions	Bibliographic Details.Material Type	Bibliographic Details.Resource Type
Ebook titles	Book	Book – Electronic; Braille Book – Physical; Manuscripts – Electronic; Manuscript - Component Part; Monographic component part - Physical; Monographic component part - Electronic; Book – Physical; Braille Book – Physical; Manuscripts – Physical
Music score titles	Music	Notated music – Physical; Notated music - Electronic; Manuscripts – Physical; Braille Music - Physical

Digital/Electronic Books

ACRL Line 40, column B; IPEDS Section I [F]

- Include
  - Cataloged e-books
  - E-books in aggregated sets, as long as the library selected the aggregator (even if not each individual ebook title)
  - Government documents, locally digitized e-books, e-theses, and dissertations
  - Digital music scores if searchable by title through the library catalog or discovery system
  - Open access titles if the individual titles are searchable through the library's catalog or discovery system
- Exclude
  - E-book titles from HathiTrust, Center for Research Libraries, Internet Archive, and similar collections, unless the library owns the digitized title and it is accessible under current copyright law
  - E-book titles from DDA or PDA collections, unless they have been purchased by the library

Additional guidance from ACRL:

- Count each e-book title as a single title, regardless of the number of users associated with it
- If possible, do not report duplicate titles even if the titles are in two or more databases or services (i.e., report titles at the bib level, not at the service or portfolio level)
- A dissertation database (such as ProQuest Dissertations & Theses Database) is reported as a database, not here

Run report in NZ to include GALILEO e-resources

Digital/Electronic Books Report 40.B
Sample Criteria & Results
Titles Subject Area

▲ **Selected Columns**

Title Measures	Title Details	Institution
Num of Titles with Electronic Portfolios (Active) ⚙	Data updated as of (Titles Subject Area) ⚙	⊞ Institution Code ⚙

▲ **Filters**

▼ Suppressed From Discovery is equal to / is in No
AND ▼ Material Type is equal to / is in Book; Music
AND ▼ Resource Type is equal to / is in Book - Electronic; Book - Digital; Book - Physical; Book chapter - Electronic; Book chapter - Physical; Braille Book - Physical; Manuscript – Component Part; Manuscripts - Electronic; Manuscripts - Physical; Monographic component part - Electronic; Monographic component part - Physical; Braille Music - Physical; Notated music - Electronic; Notated music - Physical
AND ▼ Institution Code is equal to / is in 01GALI_KENNESAW; 01GALI_NETWORK

Your institution here ↗

An alternative to Material Type and Resource Type is BIB LDR position—see documentation.

Digital/Electronic Books Report 40.B
Sample Results
Titles Subject Area

Directions on how to add info at the top from the criteria.

(Don't need to add a count in this case.) Nice-to-have, but unnecessary as long as you know you have data from the last fiscal year.

Title			
40 Column B | eBooks	[A]	✏	✖

Narrative			
Data Updated as of 5/6/2022	[A]	✏	✖

Table	[A]	xyz	✏	✖

Num of Titles with Electronic Portfolios (Active)	Institution Code
696,468	01GALI_KENNESAW
744,248	01GALI_NETWORK
1,440,716	**Grand Total**

Digital/Electronic Books Report 40.B
Sample Criteria
E-Inventory Subject Area

You can customize the column heading

Bibliographic Details	Institution	Electronic Collection
📙 Number of titles ⚙	⊞ Institution Code ⚙	⊞ Electronic Collection Public Name ⚙

◢ **Filters**

Your institution here

These names may change to numbers after you save the file.

▼ Suppressed From Discovery is equal to / is in No
AND ▼ Institution Code is equal to / is in 01GALI_KENNESAW; 01GALI_NETWORK
AND ▼ Material Type is equal to / is in Book; Music
AND ▼ Resource Type is equal to / is in Book - Electronic; Book - Digital; Book - Physical; Book chapter - Electronic; Book chapter - Physical; Braille Book - Physical; Manuscript – Component Part; Manuscripts - Electronic; Manuscripts - Physical; Monographic component part - Electronic; Monographic component part - Physical; Braille Music - Physical; Notated music - Electronic; Notated music - Physical
AND ▼ Lifecycle is equal to / is in In Repository
AND ▼ Availability is equal to / is in Available
AND ▼ Electronic Collection Lifecycle is equal to / is in In Repository
AND ▼ Electronic Collection Public Name is not equal to / is not in YBP DDA

Whichever one(s) you need to exclude

Digital/Electronic Books Report 40.B
Sample Criteria
E-Inventory Subject Area

Edit the filter to count titles

Bibliographic Details	Institution	Electronic Collection
COUNT(DISTINCT MMS Id) ⚙	⬛ Institution Code ⚙	⬛ Electronic Collection Public Name ⚙

◢ **Filters**

▼ Suppressed From Discovery is equal to / is in No

AND▼ Institution Code is equal to / is in 01GALI_KENNESAW; 01GALI_NETWORK

AND▼ Material Type is equal to / is in Book; Music

AND▼ Resource Type is equal to / is in Book - Electronic; Book - Digital; Book - Physical; Book chapter - Electronic; Book chapter - Physical; Braille Book - Physical; Manuscript – Component Part; Manuscripts - Electronic; Manuscripts - Physical; Monographic component part - Electronic; Monographic component part - Physical; Braille Music - Physical; Notated music - Electronic; Notated music - Physical

AND▼ Lifecycle is equal to / is in In Repository

AND▼ Availability is equal to / is in Available

AND▼ Electronic Collection Lifecycle is equal to / is in In Repository

AND▼ Electronic Collection Public Name is not equal to / is not in YBP DDA

Edit the Filter to Count Titles [1]

The expression is automatically selected; leave it that way.

Click here and choose Aggregate/Count Distinct

Edit the Filter to Count Titles [2]
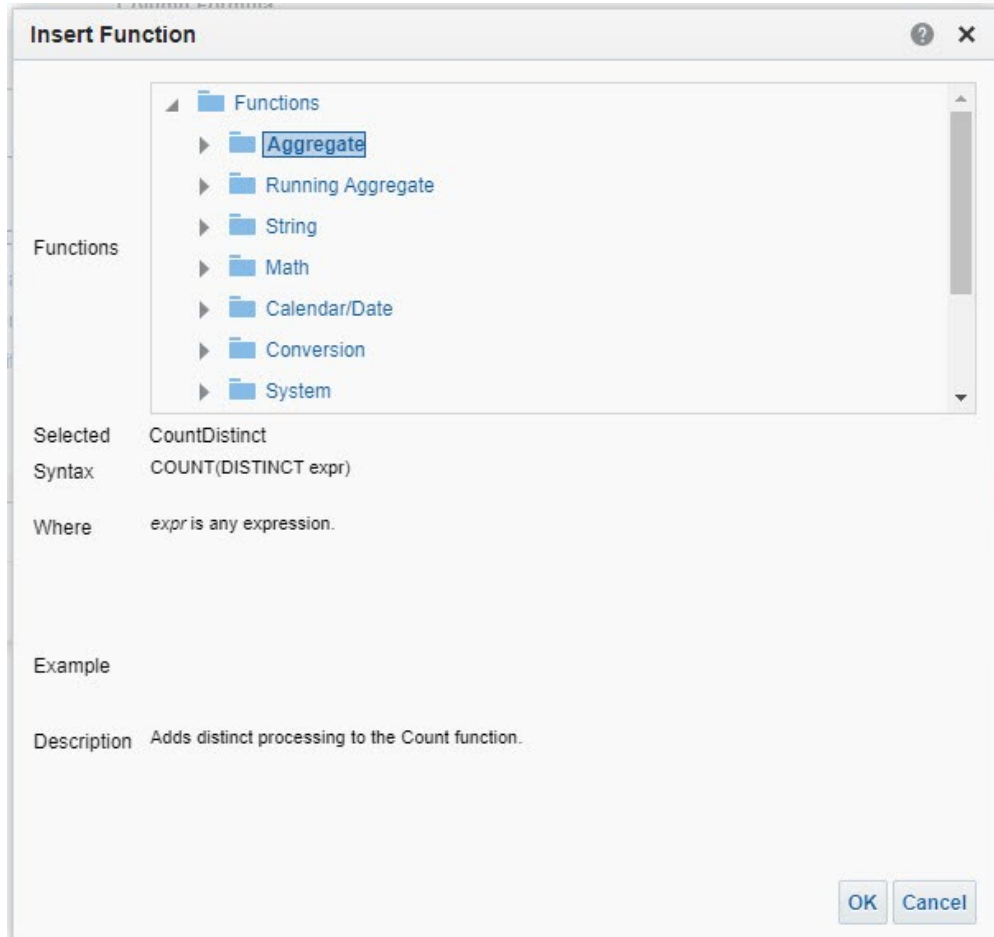
Edit the Filter to Count Titles [3]
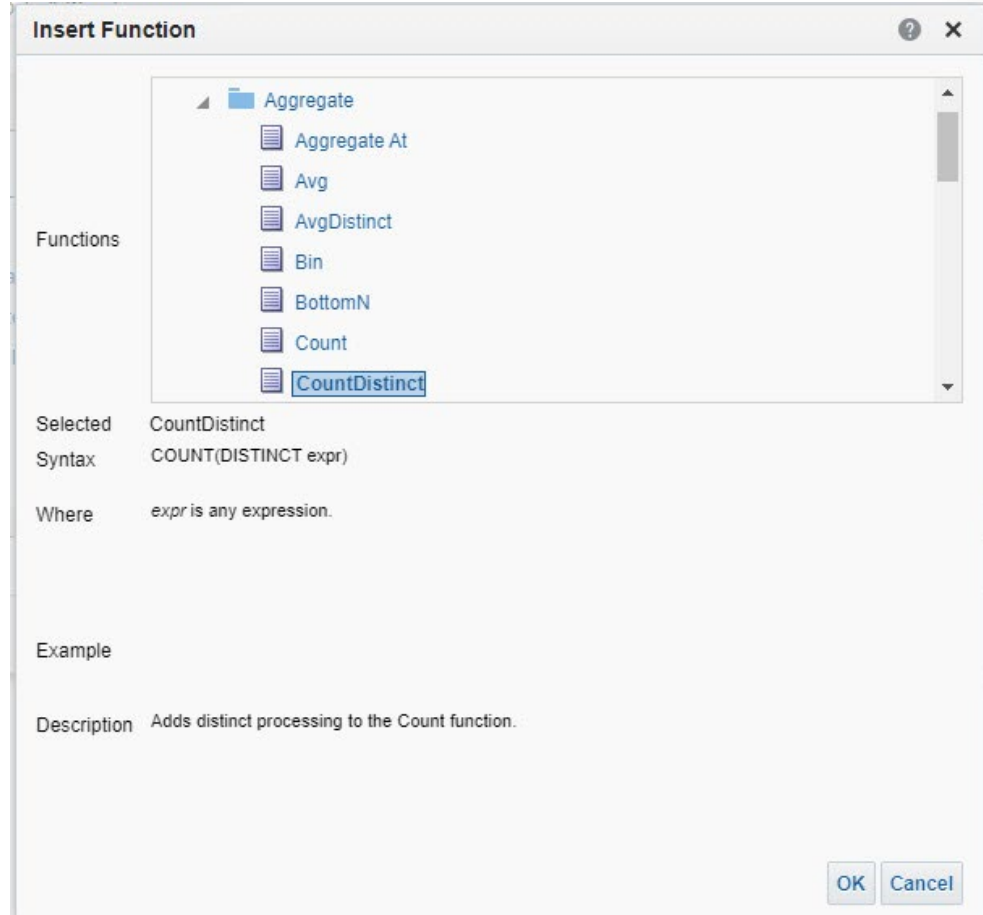
Digital/Electronic Books Report 40.B
Sample Results
E-Inventory Subject Area

COUNT(DISTINCT MMS Id)	Institution Code	Electronic Collection Public Name
4,612	01GALI_KENNESAW	ACLS Humanities eBook
116		APA PsycBooks
2,778		Accessible Archives Complete

19		Science Database
4		Social Science Database
205,238		U.S. Government Publishing Office (GPO) Electronic Collection
768		WestlawNext Campus Research Law
1,421,873	Grand Total	

Grand Total (1)

Table

COUNT(DISTINCT MMS Id)	Institution Code	Electronic Collection Public Name
4,612	01GALI_KENNESAW	ACLS Humanities eBook
116		APA PsycBooks
2,778		Accessible Archives Complete
22		American Periodicals Series
12		Bloomsbury Collections Education 2019
243		Bloomsbury Drama Online: L.A. Theatre Works: Audio Plays
1		Bloomsbury Encyclopedia of Philosophers
121		Bloomsbury Fairchild Library
153		Bloomsbury Fashion Business Cases

Grand Total (2)

Click sigma

Grand Total (3)

Digital/Electronic Media 42 Col. B

ACRL/IPEDS instructions	Bibliographic Details.Material Type	Bibliographic Details.Resource Type
E-Media	Computer file	Audio musical - Electronic, Physical; Audio nonmusical - Electronic, Physical; Projected medium - Electronic, Physical
Cartographic	Map	Atlas - Electronic, Physical; Map - Electronic, Microfiche, Microfilm, Physical
	Music	Music - Component Part
Digital Graphic	Visual material	2D non-projectable graphic - Electronic, Physical; Kit - Physical; Microforms
Exclude serials.	~~Journal~~	

Digital/Electronic Media

ACRL Line 42, column B; IPEDS Section I [H]

- Report titles of e-media materials owned or leased by the library if the individual tiles are cataloged and/or searchable through the library catalog or discovery system. E-media materials are media materials that are in digital format and are available for download or streaming (e.g., report titles from Films on Demand or Alexander Street Press). (ACRL)
- Include digital graphic materials and cartographic materials. Include e-media titles in aggregated sets in which the library selected the aggregator even if not each individual title.
- Report the number at the administrative entity level; do not duplicate unit count for each branch.
- Do not count image databases (Artstor, AP Photo Archive) in this category as these resources should be counted as databases. Do not include titles generated by demand-driven acquisition (DDA) or patron-driven acquisition (PDA) collections unless they have been purchased or leased by the library.

Additional guidance from ACRL:

- Include open access titles if they are searchable through the library's catalog or discovery system.
- Exclude serials.

Run report in NZ to include GALILEO e-resources

Digital/Electronic Media Report 42.B Sample Criteria

◢ **Selected Columns**

Title Measures	Title Details	Institution
▤ Num of Titles with Electronic Portfolios (Active) ⚙	▤ Data updated as of (Titles Subject Area) ⚙	▦ Institution Code ⚙

You could delete this column too.

◢ **Filters**

▼ Resource Type is equal to / is in 2D non-projectable graphic - Electronic; 2D non-projectable graphic - Physical; 2D non-projectable graphic – Component Part; Atlas - Electronic; Atlas - Physical; Audio musical - Electronic; Audio musical - Physical; Audio nonmusical - Electronic; Audio nonmusical - Physical; Audio nonmusical – Component Part; Braille Map - Physical; Braille Music - Physical; Computer file - Digital; Digital File - Audio; Digital File - Data; Digital File - Image; Digital File - Video; Map - Digital; Map - Electronic; Map - Electronic - Serial; Map - Microfiche; Map - Microfilm; Map - Microopaque; Map - Physical; Map – Component Part; Mixed material - Digital; Music - Digital; Music – Component Part; Projected media – Component Part; Projected medium - Electronic; Projected medium - Physical; Visual material - Digital

AND ▼ Material Type is not equal to / is not in Journal

AND ▼ Suppressed From Discovery is equal to / is in No

AND ▼ Institution Code is equal to / is in 2954.0; 2931.0 ← *These names change to numbers after you save the file.*

AND ▼ Lifecycle is equal to / is in In Repository

Digital/Electronic Media Report 42.B Sample Results

- Why include all those resource types? Because there are items there and because that's how the definition asks for the collection to be broken down.

Num of Titles with Electronic Portfolios (Active)	Resource Type
0	2D non-projectable graphic - Electronic
0	2D non-projectable graphic - Physical
6	Atlas - Electronic
0	Atlas - Physical
72,752	Audio musical - Electronic
0	Audio musical - Physical
199	Audio nonmusical - Electronic
0	Audio nonmusical - Physical
0	Kit - Physical
18	Map - Electronic
0	Map - Microfiche
0	Map - Microfilm
2	Map - Physical
53	Microforms
0	
0	
2	Music – Component Part
18,025	Projected medium - Electronic
3,538	Projected medium - Physical

Digital/Electronic Serials 43 Column B

ACRL/IPEDS instructions	Bibliographic Details.Material Type	Bibliographic Details.Resource Type
"Report the number of current and ceased e-serial titles that are accessible through the library's catalog, discovery system or other technical means."	Journal	Braille Serial - Physical Journal (Ceased publication) - Electronic Journal (Ceased publication) - Physical Journal - Digital Journal - Electronic Journal - Physical Newspaper - Electronic Newspaper - Physical Newspaper (Ceased publication) - Electronic Newspaper (Ceased publication) - Physical Other Serial (Ceased publication) - Electronic Other Serial (Ceased publication) - Physical Other Serial - Electronic Other Serial - Physical

Digital/Electronic Serials

ACRL Line 43, column B; IPEDS Section I [I]

- Report the number of current and ceased e-serial titles that are accessible through the library's catalog, discovery system or other technical means.
- An e-serial is a periodical publication issued in successive parts bearing numerical or chronological designations, is intended to be continued indefinitely, and is published in digital form to be displayed on a computer screen in any medium. This definition includes digital and digitized periodicals, newspapers and annuals (reports, yearbooks, etc.); the journals, memoirs, proceedings, transactions, etc. of societies; and numbered monographic series.
- If possible:
  - Report the count of only those de-duplicated or otherwise unique e-serial titles.
  - Include ceased electronic serial titles.
  - Do not count earlier title changes; however, do not worry about removing them if it is not possible/feasible. A source for counting e-serials may be a library- o vendor-developed A-Z title list of e-journals.
- Include open access titles if the individual titles are searchable through the library's catalog or discovery system, but do not count e-serial titles from Hathi Trust, Center for Research Libraries, Internet Archive, and similar collections unless the library owns the digitized item and it is accessible under current copyright law.

Additional guidance from ACRL:

- Report serial titles, not subscriptions.

E-Serials Report 43 Column B
Analytics Sample Criteria

43 Column B
Analytics Report Results

Tips for Electronic Titles

- Prepare your reports as early as possible so you have time to think things through and ask questions
- Save reports for next year to ensure consistency
- Use the *Titles* or *E-Inventory* subject area
- Check for the title subject area update with June data
- Run in the Network Zone
- Include filters 'Is Active' and 'In Repository'
- Report and search results should be reproducible. Sometimes Alma stops working. You may need to log out and start fresh.

Resources

- ACRL 2021 Survey Information libguide (ACRL)
  - Login required to access 2021 survey, but past years' instructions and definitions are freely available
- IPEDS 2021-2022 Data Collection System survey materials (NCES)
- Fields that Identify the Bibliographic Material Type (Ex Libris)
- Alma resource type definitions (Ex Libris)
- Configuring item policies (Ex Libris)
- Configuring physical item material type descriptions (Ex Libris)
- GIL Analytics wiki (GIL Assessment Committee)

QUESTIONS?