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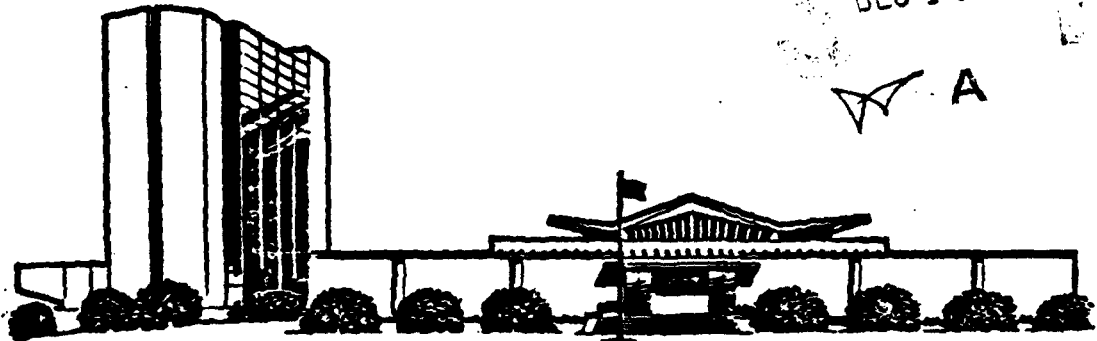
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Lister Hill Technical Report CR 81-12

# REPORTING REQUIREMENTS FOR THE ARMY LIBRARY

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## 1.0 INTRODUCTION

The Lister Hill National Center for Biomedical Communications as the R&D arm of the National Library of Medicine is developing an integrated minicomputer based library system (ILS). The circulation module of the system is currently being implemented at the Army Library, Pentagon. As part of the design of the circulation module a series of reports has been developed. These reports include library correspondence generated by the circulation department (overdue, reserve, and recall notices), bibliographies, and management reports for better control of the collection and evaluation of library services. The reports requirements described in this document reflect the needs of the Army Library, Pentagon. They are a subset of the general reporting requirements developed for the ILS circulation module. The generic requirements will be discussed in a separate paper.

The primary purpose of this task was to identify the needed reports and to design their format. Also, the data elements in each report were to be matched against the record design. Thus the assignment involved frequent interaction with the design team.

The bulk of this paper contains report formats and descriptions. A summary chapter gives a table showing report name, frequency, and use. The column, "Report Elements Missing", requires some explanation. As reports were developed, elements were required that were not present in the original design of the records. These have now been added;

however, the chart and the text - as interim documentation - contain references to these missing data elements. As the system now stands there are no missing data elements.

This chapter will discuss further the current reporting system and the advantages of automating reports. It will note the various report categories, each of which comprises a separate chapter. It will also discuss in general terms how reports have been described.

#### 1.1 The Army Library's Current Reporting System

Like many libraries with manual circulation systems, the Army Library's reporting system was time-consuming, tedious, and yielded minimal information. The number of books checked out daily was estimated; no attempt was made to determine the number of circulating items by classification. The number of returns was estimated at 99% of the items checked out and scheduled for return. Individual librarians kept tallies of the number of interlibrary loans processed, reserves placed, telephone calls for overdue or reserved books for the weekly summary and monthly manpower report. There was no information available on patrons or patron usage of the library.

#### 1.2 Opportunities Afforded by Automation

Although the primary function of an automated circulation system is better control over the collection, a secondary purpose is to collect better statistical data with less effort. The automated circulation system would generate most of the library's correspondence - overdue notices, reserve notices and interlibrary loan status reports.

It would give not only total circulation figures, but also a breakdown by classification or type. It could also give information on how individual items were used (that is, within the library, for regular borrowing periods, or on extended loan). More importantly the system would enable the library to identify classes of library patrons and to determine how each class used the collection and reference services available. This information, in turn, could be used to determine how effective the library was in meeting its patrons' needs.

### 1.3 Report Categories

The reports described in this document have been organized into several broad categories.

- o Circulation Unit Correspondence
- o Reports For Patrons
- o Management Reports - Day-to-Day Activities
- o Management Reports - Yearly
- o Miscellaneous

The Circulation Unit Correspondence includes overdue and reserve notices, receipts for return of items, inventory reports to patrons who have items on extended loan and other similar notices.

Reports For Patrons include subject bibliographics and a current awareness service. At a later date a Selective Dissemination of Information System which will provide patrons with updated literature based on a profile of user interests, may be implemented and requirements for these reports are included as well.

Management Reports include statistical information on the use of the collection. This includes a breakdown of registered borrowers. It also includes information on the system itself and the Monthly Activity Report which is required by the Army. This report has been separated into two chapters. The first deals with day-to-day operations and the second discusses year-end or other infrequent reports such as a users survey.

A report for the Federal Library Survey is included under Miscellaneous Reports, as is a report on use of the patron file required by the Privacy Act.

#### 1.4 Report Descriptions

For each report identified the following information is given: The content of the report is described; its purpose, distribution and frequency of generation is noted. The suggested format for the report is depicted. Whenever applicable, data elements for the reports are matched against the data elements for the record. Activities for the transaction log are noted in the summary chapter.

## 2.0 METHODOLOGY

Because the primary aim of this task was to meet the Army Library's reporting needs, considerable time was spent examining the current reports and talking to library staff about the type of information needed to make decisions or to justify decisions that would be made. For example, concern for funding was the impetus for the User Survey, which is a study of patron use of library services. At present the Army Library services a wide clientele although it is funded exclusively by the Army.

Not only was the type of report considered, but particular attention was given to wording and format. Each report documented here has been matched against current reporting and checked with the Army Library people who will be using it.

As far as the design team was concerned the objective of this report was to define the data elements. If the report requirements indicated additional elements were needed, this was a consideration for the design of the data base. To provide this information, a series of matrices were developed which are described below.

### 2.1 Description of the Matrices

There are three separate matrices, one for each type of record. Figure 1 illustrates the matrix for the Item Activity Record, which contains the information on a book's status and its use or "activity." The data elements that comprise the record are shown on the horizontal axis (identified as file elements), each data element in a given re-

FILE ELEMENT		ITEM ACTIVITY RECORD
REPORT ELEMENT		
ITEM ID		
INTERNAL ID		
VOL. #		
ISSUE - PART #		
TYPE OF ITEM		
COPY #		
REF. CIRC DIS.		
CALL #		
PUB. DATE		
MAXIMUM LOAN PERIOD		
STATUS CODE		
DUE DATE		
PATRON ID		
DATE ITEM LAST USED		
TOTAL # OF USES		
TOTAL RESERVES		
RESERVED FOR		
ASSOCIATED MESSAGES		

FIGURE 1  
ITEM ACTIVITY RECORD MATRIX



port is listed in the column titled "report element" and is then matched against the record. Figure 2 and Figure 3 shows the Patron Record Matrix and the Circulation Item Main Record Matrix respectively. Each report in this document utilizes elements from one or more of these records. For example, the List of Patrons uses information contained solely in the file of patron records. The Reserve Notice uses elements from all three.

## 2.2 Definition of the Data Elements

For most of the data elements the meaning is obvious. Patron name refers to the name of the patron as it appears in his patron record. However, the meaning of all data elements is not equally apparent. This section will define those elements in each record which might be confusing. The purpose of this definition is to ensure that the definition of the element for the report coincides with the definition of the element by the data base design group.

### 2.2.1 Item Activity Record

The following are data elements and definitions for the Item Activity Record:

Item ID - the bar code number that uniquely identifies the item being circulated

Internal ID - any other identification number

Volume # - applicable only to multi-volume works or serials

Issue Part # - applicable only to multi-volume works or serials

Type of Item - may be designated as a monograph, serial or law item, slide, record, etc

FILE ELEMENT	PATRON RECORD
NAME	
TYPE	
NAME OR TITLE	
SERVICE	
AGENCY SYMBOL	
WORK ADDRESS	
WORK PHONE	
ROOM NUMBER	
DATE OF RECORD ENTRY	
SBI PROFILE	
EXPIRATION DATE	
SUBJECT IN SBI	
DATE LAST USED	
HOME ADDRESS	
HOME PHONE	
CONTRACT	
DATE CONTRACT EXPIRES	
SCHOOL AFFILIATION	
DATE SCHOOL EXPIRES	
POINT OF CONTACT	
BAR CODE I.D. #	
MESSAGES	
LOAN PERIOD	
TOTAL USES	

FIGURE 2  
PATRON RECORD MATRIX

FILE ELEMENT	LC CARD #	CIRCULATION ITEM MAIN RECORD	
	ISBN		
ISSN			
LOCAL CALL #			
(AUTHOR) MAIN ENTRY			
TITLE STATEMENT			
DATE OF PUBLICATION			
SERIES STATEMENT, CONF			
SUBJECT HEADING			
REPORT ELEMENT			

FIGURE 3  
CIRCULATION MAIN ITEM RECORD MATRIX

Copy # - applicable wherever there are multiple copies of the same work

Ref. Circ. Dis. - indicates whether a copy is for reference or for circulation

Call # - classification number

Publication date - date of publication

Maximum loan period - two weeks for monographs, one week for serials, overnight for reference works (as an example)

Status code - whether an item is checked out, or on reserve, at the bindery or on the shelf

Due date - when an item currently checked out is due in the library

Patron ID - if an item is checked out, the ID number of the person to whom it is checked out

Date item last used - the date when an item is checked out

Total # of uses - within a year's period, the number of times an item circulated

Total reserves - the number of patrons who have requested a reserve on a specific item

Reserved for - the list of patron ID numbers for whom the item is reserved in order of their reservations

Associated messages - this is available for notes of a transient nature; for example, the circulation personnel might note that an item was damaged or needed repair

### 2.2.2 Patron Record

The following is a list of data elements and definitions for the patron record:

Name - name of the patron

Type - may be regular, retired, student, contractor or a library (for Army Library)

Rank or title - refers to either military rank or preferred form of address, (Mr., Mrs., Ms.).

Service - indicates branch of the service for both retired and active duty military personnel.

Agency symbol - identifies offices for within DoD personnel such as DCA, JCS.

Work address - self-explanatory, used for Pentagon personnel, contractors.

Work phone - self-explanatory.

Room number - self-explanatory.

Date of record entry - date the patron record was made.

SDI profile - that the patron is entitled to have special bibliographics (SDI report) prepared for him. It will state the desired frequency of updates and predefined format of his report.

Expiration - the date after which the SDI profile will not be run.

Subject in SDI - self-explanatory.

Date last used - the date the patron last checked out an item.

Home address - self-explanatory - used for retired military personnel.

Home phone - self-explanatory - personnel.

Contract - contract number for contractor libraries.

Date contract expires - self-explanatory.

School affiliation - for patrons who are students.

Date school expires - self-explanatory.

Point of contact - the librarian to whom interlibrary loans are made.

Bar code ID # - the patron's unique bar coded identification number.

Messages - free text.

Loan period - used for VIPs or offices with extended borrowing privileges.

Total uses - a register of how many times the patron has used the library; cleared once a year.

### 2.2.3 The Circulation Item Main Record

The following is a list of data elements and definitions for the Circulation Item Main Record, or bibliographic record:

LC Card # - Library of Congress card number

ISBN - International Standard Book Number

ISSN - International Standard Serial Number

Local Call # - the classification number used by the Army Library

(Author) Main Entry - usually the author of a book, but may be a corporate author

Title Statement - the title of the book

Series Statement Corp. - if a work is one in a series, there will be a statement with the title of the series. May also be used for corporate author.

Subject heading - refers to Library of Congress subject headings.

### 2.3 Organization of Report Matrices

The report matrices match the data elements in the reports against the data elements in the original design of the records. Since the matrices are of interest only to the design team, they have been collected and placed in a separate appendix. They are organized in Appendix A by report type (correspondence, patron, management) and follow the arrangement of reports contained in the body of the text.

### 3.0 CIRCULATION UNIT CORRESPONDENCE

One of the major advantages of the new circulation system is that correspondence relating to overdue or reserved books can be generated automatically. This will not only free staff members from time-consuming telephone calls, but once implemented, should result in more books being returned on time. Circulation Unit Correspondence falls into four categories: overdue notices, inventory reports, reserve notices and receipts. Each of these will be described in this section.

#### 3.1 Overdue Notices

At the present time the Army Library does not send out overdue notices. To accustom patrons to the new policy, two forms of overdue notices have been developed.

##### 3.1.1 Courtesy Notices

The first format is called a Courtesy Notice and is shown in Figure 4. This notice lists all items checked out to the patron; overdue items are marked with an asterisk. If the item is not returned, the notice is generated again with two asterisks after the item. This will be incremented up to five asterisks. The notice is formatted so that the patron address, which includes rank, name, and work address including room number (if applicable), is printed on the lower third of the page. This should facilitate mailing. This feature will be true for all Circulation Unit Correspondence.

The Army Library, Pentagon  
Room 1A518  
Washington, D. C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(day's date)

This is a complete listing of all material charged to you.

Overdue items are marked with an asterisk and should be returned  
as soon as possible.

<u>Call Number</u>	<u>Author</u>	<u>Title</u>	<u>Date Charged</u>	<u>Date Due</u>
--------------------	---------------	--------------	---------------------	-----------------

To: (patron rank) (patron name)

(address) \_\_\_\_\_

\_\_\_\_\_

FIGURE 4

OVERDUE OR COURTESY NOTICE



The Army Library, Pentagon  
Room 1A518  
Washington, D. C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(day's date)

The following materials charged to you to date are overdue. Please  
return them immediately.

<u>Call Number</u>	<u>Author</u>	<u>Title</u>	<u>Date Due</u>
--------------------	---------------	--------------	-----------------

To: (patron rank) (patron name)

(address) \_\_\_\_\_

\_\_\_\_\_

Figure 5

ALTERNATE OVERDUE NOTICE

### 3.1.2 Alternate Overdue Notices

Although the library does not intend to use this notice immediately, as the patrons become accustomed to overdue notices this format (Figure 5) may be adopted.

This notice would be generated one week after an item fell due, and would include all items that were overdue on that date. Subsequent notices would add an asterisk to outstanding overdues. The data elements are shown in Appendix A, Figure A-1.

### 3.1.3 Delinquent Borrower's Letter

The delinquent borrower's letter (Figure 6) is sent after several months have passed. The key to this report is the date the item was checked out. For example, in May the library might send such letters to patrons holding books which fell due in January. These notices would be generated once a month. The data elements are shown in Figure A-2.

## 3.2 Inventory Reports

Inventory reports are statements to patrons listing the items checked out to them. Both VIP patrons and libraries participating in interlibrary loan receive such reports.

### 3.2.1 Inventory Notice for Items on Extended Loan (VIPs)

VIPs are regular military with General/Flag rank (brigadier general or above) and civilian employees with the rank of GS-16 or above. These patrons are granted extended loan privileges, which means that the patron is not required to return the book to the library at a set date, therefore, no item can be considered overdue.

The Army Library, Pentagon  
Room LA518  
Washington, D.C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(Day's Date)

The following item(s) has been reported overdue since  
(date checked out) \_\_\_\_\_. If you require the material for an  
additional period, please notify the library so that the item(s)  
can be renewed for two more weeks. If it is lost, please notify  
the library. Thank you for your cooperation.

CALL  
NUMBER

AUTHOR/TITLE

DATE  
DUE

TO: (Patron rank), (Patron Name)

(Address) \_\_\_\_\_  
\_\_\_\_\_

FIGURE 6

DELINQUENT BORROWER'S LETTER

However, the Army Library would like to control items on extended loan and retrieve those that are no longer being used by the patron. Therefore, VIP patrons will be issued a statement detailing which items have been checked out to them. The format for this statement is shown in Figure 7, and the data elements in Figure A-3.

These reports will be generated monthly.

### 3.2.2 Interlibrary Loan Status Reports

The Interlibrary Loan Status Report is generated monthly and is sent to any library (patron) that has borrowed items from the Army Library during that month that are still outstanding.

The format (Figure 8) includes a column "Date Returned" which is marked with an asterisk. This column may be filled in by the recipient to indicate items returned, (but perhaps not yet received by the Army Library).

It should be noted that the address includes the name of the contact person at the borrowing library.

Data elements are shown in Figure A-4.

### 3.3 Reserve Notices

Reserve Notices are generated daily and sent to patrons who have requested an item which has now been returned to the library. The privilege of placing reserves is limited to specific classes of borrowers, which will be indicated in the patron record. At present this is an optional report for the Army Library; notification of items

The Army Library, Pentagon  
Room 1A518  
Washington, D. C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(day's date)

The following items have been checked out to you. If this is not  
in agreement with your records please notify the Army Library,  
Circulation Desk.

<u>Date Borrowed</u>	<u>Call Number</u>	<u>Author/Title</u>	<u>Date Due</u>
			(extended date)

To: (patron rank) (patron name)  
(address) \_\_\_\_\_  
\_\_\_\_\_

FIGURE 7

INVENTORY REPORT FOR ITEMS ON EXTENDED LOAN (VIPs)

The Army Library, Pentagon  
Room 1A518  
Washington, D. C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(day's date)

The following items have been borrowed from the Army Library. If this agrees with your records please sign and return one copy. If there are discrepancies, please note and return.

Date Borrowed   Call Number   Author/Title   Date Due   Date Returned\*

Total Items

(Name of Library) \_\_\_\_\_

(Address) \_\_\_\_\_

Attn: Contact Person \_\_\_\_\_

FIGURE 8

INTERLIBRARY LOAN STATUS REPORT

being held on reserve will continue to be made by telephone. The format for the notice is depicted in Figure 9 and the matrix of data elements in Figure A-5.

#### 3.4 Receipt for Check-in

The receipt for an item check-in is an optional report generated whenever a receipt is requested by a patron. Since the item may be a piece of equipment rather than a book, the work "description" rather than "author/title" is used. Figure 10 gives the format and Figure A-6, the data elements.

The Army Library, Pentagon  
Room 1A518  
Washington, D. C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(day's date)

The following item(s) which you requested are being held at the  
Circulation Desk. Please pick it (them) up at your earliest  
convenience. Items will be held for three days only.

<u>Call Number</u>	<u>Author</u>	<u>Title</u>
--------------------	---------------	--------------

To: (patron rank) (patron name)

(address) \_\_\_\_\_

\_\_\_\_\_

FIGURE 9

RESERVE NOTICE



The Army Library, Pentagon  
Room 1A518  
Washington, D.C. 20310  
Tel: 202-695-5413  
Autovon 225-5413

(day's date)

The following item(s) has been returned to the Army Library.

<u>Item ID</u>	<u>Description</u>	<u>Patron to whom Checked Out</u>
	(may be author/title)	

FIGURE 10

OPTIONAL RECEIPT FOR CHECK-IN

#### 4.0 REPORTS FOR PATRONS

The Readers' Services Branch currently prepares a number of bibliographies each year for general distribution. The library also issues a monthly listing of new acquisitions which usually includes the monthly supplement to the Air University's Index to Military Periodicals. When the automated circulation system is fully operational with all items bar-coded and having complete records, it will be possible to generate some of these reports automatically. Additionally the system offers the capability of an SDI system (Selective Dissemination of Information) to tailor bibliographies for individuals and to provide updates at pre-established intervals.

This chapter then considers the following types of reports - bibliographies, current awareness notices, and SDI reports.

##### 4.1 Bibliographies

Bibliographies currently prepared by the Army Library include separate sections for monographs, periodical articles and newspapers, and law monographs and articles. The subjects are fairly narrow topics - volunteer army, cruise missile and race relations are examples. Although some bibliographies might be prepared using one or more Library of Congress subject headings, others would need the more complicated search strategies described under SDI reports.

There are serious shortfalls on this report. Only monographs and law monographs could be included. For monographs, publishers and pagination is lacking. Individual periodical articles are not included in the data base, nor are newspaper articles.

The data elements for this report are shown in Figure A-8.

The search strategies for these bibliographies should be recorded (like SDI profiles) because they are frequently updated. Also, these could be the beginnings of the SDI system.

#### 4.2 Current Awareness Reports

The Army Library currently issues a publication listing all new acquisitions by subject categories. These subjects reflect Library of Congress subject headings. The entry for a monographic includes pagination along with a full bibliographic citation. The second part of the report is a reprint of the month's Index to Military Periodicals (also arranged by subject) with asterisks designating periodicals held by the Army Library.

The automated circulation system can help in the preparation of this report by identifying newly catalogued items. The elements for the new acquisitions section of this report are shown in Figure A-9.

#### 4.3 SDI Reports

The capability to produce SDI (Selective Dissemination of Information) Reports is desired by the Army Library; however, the full SDI service will be deferred.

Selective Dissemination of Information reports tailor a bibliography to a user's needs and periodically provide him with updated information. The search strategy may be confined to an author/researcher, to a topic or to whatever a particular author has written on a specific topic. Normally the search strategy "belongs" to the individual user;

that is, no one else requires the same combination of descriptors so that bibliographies for two individuals, even in the same subject area, will differ. This may not be true for the Army Library's service.

The SDI service will be implemented in stages, the first will involve more frequent updating of current bibliographies. Although the details of implementation are beyond the scope of this paper, the impact of the service for system design is not. Therefore, the requirements for the various stages are listed below.

1. In the beginning it must be possible to develop search strategies for "canned reports" which will be subscribed to by several users. There must be a way to establish a SDI profile with a list of patrons to whom the report is to be sent.
2. For monographs the SDI format requires publisher information and pagination.
3. When periodical articles are included it will require author, article title, periodical title, volume, date of issue, and pagination.
4. It will be necessary to develop and maintain an authority file of descriptors. These descriptors should be separate from any subject headings assigned.
5. If descriptors are not to be used, keyword searching of titles and abstract (uncontrolled vocabulary) should be considered.

The format of the report may vary depending on user preference.

The possible formats could include the following.

1. Author, title, call number (for monographs)  
Author, title, journal, issue, pages (for periodicals)
2. Full bibliographic citations for both monographs and periodicals. The citation for monographs could include pagination.
3. Full citation plus abstracts.

The report itself should include a number or title for the search strategy and a list of the subject headings, descriptors or keywords used (along with the logic).

## 5.0 MANAGEMENT REPORTS: DAY-TO-DAY OPERATIONS

This chapter describes reports required for the day-to-day operations of the library. These may be generated daily, weekly or monthly. Yearly reports that reflect overall usage of the library are discussed in Section 6.0.

For ease in reviewing by the Army Library this chapter is divided according to the section generating or using the report. These sections include the following:

- o Circulation Unit (including the periodicals section)
- o Reference Section
- o Law
- o Administrative

### 5.1 Circulation Unit Reports

These reports fall into two categories - statistical information that is generated about use of the collection and status reports on patrons and items.

#### 5.1.1 Status Reports

The status reports include the daily List of Short-Term Loans, the Weekly Patron List, and the List of Missing Books.

5.1.1.1 List of Short-Term Loans to be Recalled. There are three lists of short-term loans, for monographs, periodicals and law items. These loans are usually for overnight use of reference copies; however,

this period may be extended to a few days to include weekend or holiday periods.

The report, generated daily, asks for items due that have irregular loan periods. The information needed for each item varies according to the type of material. A monograph or reference book would need author and title; a periodical would require issue number.

The patron's name and telephone number would be required.

Although the three reports are grouped on Figure 11 and their data elements are shown on the same matrix (Figure A-11), these are three separate reports.

5.1.1.2 List of Patrons. The List of Patrons is generated weekly to serve as a backup to a massive system failure. It is divided into two sections: Valid Patrons and Delinquent Patrons (Figure 12). Each section is arranged alphabetically by the patron's last name. At present there is no automatic threshold whereby a patron is declared delinquent; it can be set at the direction of the administration.

Note that the section on delinquent borrowers should show the reason for denial of service under associated messages. The data elements are shown in Figure A-12.

SHORT-TERM LOANS TO BE RECALLED					
<u>MONOGRAPHS</u>					
<u>ITEM</u> <u>ID</u>	<u>DATE</u> <u>CHECKED</u> <u>OUT</u>	<u>AUTHOR/TITLE</u>	<u>PATRON</u> <u>NAME</u>	<u>TELEPHONE</u> <u>NUMBER</u>	
SHORT-TERM LOANS TO BE RECALLED					
<u>PERIODICALS</u>					
<u>ITEM</u> <u>ID</u>	<u>DATE</u> <u>CHECKED</u> <u>OUT</u>	<u>TITLE/ISSUE</u>	<u>PATRON</u> <u>NAME</u>	<u>TELEPHONE</u> <u>NUMBER</u>	
SHORT-TERM LOANS TO BE RECALLED					
<u>LAW ITEMS</u>					
<u>ITEM</u> <u>ID</u>	<u>DATE</u> <u>CHECKED</u> <u>OUT</u>	<u>AUTHOR/TITLE</u>	<u>VOLUME</u> <u>NUMBER</u>	<u>PATRON</u> <u>NAME</u>	<u>TELEPHONE</u> <u>NUMBER</u>

FIGURE 11

SHORT-TERM LOANS TO BE RECALLED  
(3 Reports)



PATRON LIST					
(ARRANGED ALPHABETICALLY BY LAST NAME)					
(DATE)					
<u>Patron Name</u>	<u>Rank</u>	<u>ID Number</u>	<u>Work Telephone Number</u>	<u>Borrowing Privileges</u>	<u>Associated Messages</u>
A. Valid Patrons					
o					
o					
o					
o					
o					
B. Delinquent Patrons					
o					(should give reason for denial of service)
o					
o					
o					
o					

FIGURE 12

PATRON LIST

5.1.1.3 List of Missing Items. The List of Missing Items is a monthly report of items whose status is reported as missing. The report is used by staff in the Circulation Unit to search for these items.

The list is divided into two sections, each of which could be considered a separate report. The monograph section is arranged by call number to facilitate searching the shelves. The periodicals section is arranged alphabetically by title. The format is shown in Figure 13 and the data elements are identified in Figure A-13.

The library staff should record the dates on which the item was searched. Three unsuccessful searches usually result in a change of status from "missing" to "lost," however, these searches may not be concluded within a one month period. It would be desirable if the date of search could be recorded on the item's activity record.

#### 5.1.2 Circulation Statistics

Circulation Statistics are collected daily, weekly and monthly. The daily and weekly summaries are for the internal use of the Circulation Unit; the Monthly Report is required for the library's Activity Report to Army administration.

5.1.2.1 Daily Summary of Circulation Activities. The Daily Summary of Circulation Activities is not a printed report, but rather appears on the screen at the beginning of the following day and should be able to be retrieved at any time during the day. A similar report is available for reference and is described in Section 5.2.2 of this paper.

LIST OF MISSING MONOGRAPHS

(DAY'S DATE)

<u>CALL NUMBER</u>	<u>AUTHOR/TITLE</u>	<u>DATES SEARCHED</u>	<u>NOTES</u>
------------------------	---------------------	---------------------------	--------------

(ARRANGED BY CALL NUMBER)

---

LIST OF MISSING SERIALS

(DAY'S DATE)

<u>TITLE</u>	<u>ISSUE/PART</u>	<u>R/C COPY NUMBER</u>	<u>DATES SEARCHED</u>	<u>NOTES</u>
--------------	-------------------	----------------------------	---------------------------	--------------

(ARRANGED ALPHABETICALLY BY TITLE)

FIGURE 13

LIST OF MISSING ITEMS

The format of the report is shown in Figure 14. It calls for a breakdown of circulation by type - monographs, periodical and law - as well as for total circulation.

Several categories of information (for this report) are currently unavailable. These items are defined and their importance is discussed below.

Internal Circulation - refers to items used in the library by patrons, but not checked out. Both the Periodicals Section and the Law Section have heavy use of items within the library.

Number of Overdue Items Returned - The Circulation Section would like a breakdown on how many of the check-ins are overdue items. This figure would be studied over a period of time to gauge the effectiveness of the overdue notices.

Interlibrary Loans Borrowed from Other Libraries - This information is available through the manual system of interlibrary loans, primarily because request forms must be filled out for most libraries and it is easy and efficient to maintain the file. However, a register of the number of items borrowed by the Army from individual libraries would be a desirable feature.

Total of Photocopies made for other Libraries - At present this figure is included in the total of items loaned to other libraries. In view of copyright regulations; it may become necessary to break out this particular category of items. The Periodicals Section would like this capability.

DAILY SUMMARY OF CIRCULATION ACTIVITIES

DATE ( Previous day)

NUMBER  
OF ITEMS

MONOGRAPHS

CHECK-INS  
CHECK-OUTS  
RENEWALS  
RESERVES  
INTERNAL CIRCULATION

SERIALS (Periodicals)

CHECK-INS  
CHECK-OUTS  
RENEWALS  
RESERVES TAKEN  
NON-RETURNABLE ITEMS  
INTERNAL CIRCULATION

LAW

CHECK-INS  
CHECK-OUTS  
RENEWALS  
RESERVES TAKEN  
INTERNAL CIRCULATION

INTERLIBRARY LOANS

LOANED TO OTHER LIBRARIES  
NON-RETURNABLE ITEMS  
TOTAL BORROWED FROM OTHER LIBRARIES

TOTAL CIRCULATION

CHECK-INS (TOTAL INC. OVERDUES)  
CHECK-OUTS  
RENEWALS  
RESERVES  
IN-HOUSE CIRCULATION

OVERDUE NOTICES DISPATCHED  
OVERDUE BOOKS RETURNED

FIGURE 14

DAILY SUMMARY OF CIRCULATION ACTIVITIES

5.1.2.2 Weekly Summary of Circulation Activity. Like the daily report, the Weekly Summary is a screen rather than a piece of paper. It is available on call and shows the previous week's activities. (This information is needed for the Monthly Activity Report, which requires daily, weekly and monthly breakdowns. See Figure 24.)

The format of the screen is shown in Figure 15. The data elements are identical to those in Figure 14 with the additional requirement of a total for the week in each category.

5.1.2.3 Weekly Circulation Report. The Weekly Circulation Report is a breakdown of the circulation figures. Monographs are broken down by classification number as shown in Figure 16. Notice that some categories are broken down into narrow spans of numbers. This reflects areas of the collection that are heavily used. The descriptions of the categories must be included in the reports. Serials are divided into military, English: military, foreign; non-military, English; and non-military, foreign.

5.1.2.4 Monthly Circulation Report. The Monthly Report on the collection uses the same classification breakdown and description phrasing. Figure 17 shows the format; the totals for each week are given along with the total for the month for each category. The final column calls for the percentage of total circulation for each class.

WEEKLY CIRCULATION SUMMARY							
FOR WEEK ENDING CIRCULATION ACTION	(DATE)	MON.	TUES.	WED.	THURS.	FRI.	TOTAL
MONOGRAPHS							
CHECK-INS							
CHECK-OUTS							
RENEWALS							
RESERVES TAKEN							
INTERNAL CIRCULATION							
SERIALS (Periodicals)							
CHECK-INS							
CHECK-OUTS							
RENEWALS							
RESERVES TAKEN							
NON-RETURNABLE ITEMS							
INTERNAL CIRCULATION							
<u>LAH</u>							
CHECK-INS							
CHECK-OUTS							
RENEWALS							
RESERVES TAKEN							
INTERNAL CIRCULATION							

FIGURE 15  
WEEKLY SUMMARY OF CIRCULATION ACTIVITY

<u>WEEKLY CIRCULATION SUMMARY</u>							
FOR WEEK ENDING	(DATE)	MON.	TUES.	WED.	THURS.	FRI.	TOTAL
CIRCULATION ACTION							
<u>INTERLIBRARY LOANS</u>							
LOANED TO OTHER LIBRARIES							
NON-RETURNABLE ITEMS							
BORROWED FROM OTHER LIBRARIES							
<u>TOTAL CIRCULATION</u>							
CHECK-INS (INC. OVERDUES)							
CHECK-OUTS							
RENEWALS							
RESERVES							
IN-HOUSE CIRCULATION							
OVERDUE NOTICES DISPATCHED							
OVERDUE BOOK RETURNED							

FIGURE 15 (Continued)



WEEKLY CIRCULATION REPORT

TOTAL CIRCULATION		DESCRIPTION	NUMBER OF ITEMS							NUMBER OF ITEMS CIRCULATING	PERCENT OF TOTAL CIR.
CLASSIFICATION NUMBER			M	T	W	TH	F				
<u>MONOGRAPHS</u>											
A		GENERAL WORKS									
B		RELIGION AND PHILOSOPHY									
C		AUXILIARY SCIENCES OF HISTORY									
CR		HERALDRY									
CT		BIOGRAPHY									
D		GENERAL & OLD WORLD HISTORY									
D501-680		WORLD WAR I									
D731-838		WORLD WAR II									
D901-1075		EUROPE (GENERAL)									
DK		RUSSIA									
DS918-924		KOREAN WAR									
DS557-559		VIET NAM WAR									
DT		AFRICA									
E-F		AMERICAN HISTORY									
E201-298		REVOLUTION									
E301-453		REVOLUTION TO CIVIL WAR									
E351-364		WAR OF 1812									
E456-655		CIVIL WAR									
E714-735		SPANISH-AMERICAN WAR									
E740		TWENTIETH CENTURY									
F1401-1419		LATIN AMERICA									
F2201-2239		SOUTH AMERICA									

FIGURE 16

WEEKLY CIRCULATION REPORT

WEEKLY CIRCULATION REPORT

TOTAL CIRCULATION		WEEKLY CIRCULATION REPORT							PERCENT OF TOTAL CIR.
CLASSIFICATION NUMBER	DESCRIPTION	NUMBER OF ITEMS							
		M	T	W	TH	F	NUMBER OF ITEMS CIRCULATING		
G	GEOGRAPHY, AUTOHOPOLOGY, FOLKLORE								
GC	OCEANOGRAPHY								
H	SOCIAL SCIENCE								
HB	ECONOMIC THEORY								
HC	ECONOMIC HISTORY & CONDITION								
HD4801-8942	NATIONAL PRODUCTION								
HE	LABOR								
HF	TRANSPORTATION & COMMUNICATION								
HG	COMMERCE								
HM	FINANCE								
HN	SOCIOLOGY (GENERAL & THEORETICAL)								
HV	SOCIAL HISTORY, SOCIAL PROBLEMS, SOCIAL REFORMS								
HY	SOCIAL PATHOLOGY, SOCIAL & PUBLIC WELFARE, CRIMINOLOGY								
	SOCIALISM, COMMUNISM,								

FIGURE 16 (Continued)

WEEKLY CIRCULATION REPORT

WEEKLY CIRCULATION REPORT

CLASSIFICATION NUMBER	DESCRIPTION	NUMBER OF ITEMS							PERCENT OF TOTAL CIR.
		R	T	W	TH	F	S	S	
J	POLITICAL SCIENCE -OFFICIAL DOCUMENTS								
JC	POLITICAL THEORY, THEORY OF THE STATE								
JX	INTERNATIONAL LAW, INTERNATIONAL RELATIONS								
K	LAW - SEE SEPARATE REPORT ENTITLED "LAW CIRCULATION"								
L	EDUCATION								
M	MUSIC								
N	FINE ARTS								
P	LANGUAGE & LITERATURE								
PC	ROMANCE LANGUAGES								
PF	GERMANIC LANGUAGES								
PG	SLAVIC LANGUAGES								
PJ	6001-8517 ARABIAN								
PL	501-889 JAPANESE								
PL	901-998 KOREAN								
PL	1001 - 3207 CHINESE								
PL	8000 - 8844 AFRICAN								
Q	SCIENCE								
QA	MATHEMATICS								
QA 76	COMPUTER SCIENCE, ELECTRONIC DATA PROCESSING								

TABLE 16 (Continued)

WEEKLY CIRCULATION REPORT

Reproduced from  
best available copy.

WEEKLY CIRCULATION REPORT

TOTAL CIRCULATION

CLASSIFICATION NUMBER	DESCRIPTION	NUMBER OF ITEMS					PERCENT OF TOTAL CIR.
		Q	T	W	TH	F	
QB	ASTRONOMY						
QC	PHYSICS						
QD	CHEMISTRY						
QE	GEOLOGY						
QH	NATURAL HISTORY						
R	MEDICINE						
T	TECHNOLOGY						
TA	ENGINEERING						
U	MILITARY SCIENCE						
U21.5	MILITARY UNIONS						
UA	ARMIES, ORGANIZATION, DESCRIPTION, FACILITIES, ETC.						
UB	MILITARY ADMINISTRATION						
UC	MAINTENANCE & TRANSPORTATION						
UD	INFANTRY						
UE	CALVARY: ARMORED & MECHANIZED						
UF	ARTILLERY						
UG	MILITARY ENGINEERING						
UG 622-1425	AIR FORCES, AIR WARFARE						
UG	OTHER SERVICES						
V	NAVAL SCIENCE						
VA	NAVIES, ORGANIZATION, DESCRIPTION, FACILITIES, ETC.						

FIGURE 16 (Continued)

WEEKLY CIRCULATION REPORT

TOTAL CIRCULATION		WEEKLY CIRCULATION REPORT							PERCENT OF TOTAL CIR.	
CLASSIFICATION NUMBER	DESCRIPTION	NUMBER OF ITEMS								
		W	T	U	TH	F	S	S	NUMBER OF ITEMS CIRCULATING	
VE VG Z Z 662-1000	MARINES MINOR SERVICES OF NAVIES BIBLIOGRAPHY & LIBRARY SCIENCE LIBRARIES & LIBRARY SCIENCE									

FIGURE 16 (Concluded)

WEEKLY CIRCULATION REPORT

MONTHLY CIRCULATION BREAKDOWN							
TOTAL MONTHLY CIRCULATION _____							
Class. #	Description	Number of Items Per Week				Number of Items Per Class.	Percentage of Total Circulation
		Week 1	Week 2	Week 3	Week 4		
Same as Weekly	Same as Weekly						

FIGURE 17  
MONTHLY CIRCULATION REPORT

This report will be used by the Circulation Unit and Periodicals Section to determine use of the collection. The staff anticipated using the report for public relations purposes.

#### 5.2 Readers' Services Branch Reports

Reports for the Readers' Services Branch will require additional information to that available in the files. This information is needed for the manpower report from Readers' Services to the Army Library Administration. The data is currently being tallied by individual librarians and cumulated by the section head for the monthly report. The following screens and printed reports represent an effort to meet reporting requirements easily. They should also yield useful information on the services provided by the Readers' Services Branch to various categories of users.

##### 5.2.1 Reference Librarian's Summary of Days Activity

This is a work screen for the reference librarian. It requires her to input her name or ID, and the number of man hours she worked that day. The various types of reference activities are shown in the first column. Of these, only on-line searches are currently accounted for automatically. The proposed circulation system should provide information on bibliographies prepared from its data base, SDI profiles established and SDI reports sent. (Figure 18)

The screen calls for a breakdown according to patron class. This is considered critical for a picture both of service to other libraries and of usage by the various services.

LIBRARIAN'S NAME OR ID) HOURS IN REFERENCE SECTION		SUMMARY OF DAY'S ACTIVITY					TOTAL
		NUMBER OF ACTIONS BY SERVING					
TYPE OF REFERENCE ACTIVITY		ARMY	AIR FORCE	MARINES	NAVY	CIVILIAN DoD	Other Libraries
Short Questions Answered In-Person By Phone							
Lenthy (over 30 min.) Questions Answered in Person By Phone							
On-Line Searches							
Bibliographies prepared from Data Base(s) From other than Data Base(s)							
SDI Profiles Established SDI Reports Sent							
Interlibrary Loan Requests Taken							

FIGURE 18

REFERENCE LIBRARIAN'S SUMMARY OF DAY'S ACTIVITY  
(SCREEN)



This screen's input will generate the daily and weekly summaries that follow.

#### 5.2.2 Daily Summary of Readers' Services Branch Activity

This is a summary of the Readers' Services Branch Activities for the previous day. It should be available on a screen throughout the day. The format of this report is shown in Figure 19. Its elements are all derived from data input by the individual reference librarians.

#### 5.2.3 Weekly Summary of Readers' Services Branch Activity

Like the Weekly Summary of Circulation Activity, this report is available on the screen giving statistical information for the preceding week. It tabulates the number of reference actions per day and sums them for the week. The format for this screen is shown in Figure 20. The elements are derived from the daily input of the reference librarians.

### 5.3 Law Section Reports

The Law Section of the library currently is separated from the general collection; it maintains its own circulation system and tabulates its reference actions. Under the automated system law circulation will no longer be separate.

The reports that follow are those used by the Law Section.

#### 5.3.1 Short-Term Loans to be Recalled

The format of this report and the data elements were shown in Figures 11 and A-11 respectively. Its purpose is to enable the law librarian to recall items loaned overnight (or for short periods).

DAILY SUMMARY OF READERS' SERVICES BRANCH ACTIVITY

(DATE - PREVIOUS DAY)

TOTAL MANHOURS EXPENDED \_\_\_\_\_

TYPE OF ACTIVITY

NUMBER OF ACTIONS

Short Questions Answered

In Person  
By Phone

Lengthy Questions Answered  
(Over 30 minutes)

In Person  
By Phone

On-Line Searches

Bibliographies Prepared

From Data Base  
From Other Than Data Base

SDI Profiles Established

SDI Reports Sent

Inter-Library Loan Requests  
Taken

FIGURE 19

DAILY SUMMARY OF READERS' SERVICES BRANCH ACTIVITY

WEEKLY SUMMARY OF REFERENCE ACTIVITY						
TYPE OF REFERENCE ACTIVITY	M	T	W	TH	F	TOTAL
Short Questions Answered in person by name						
Lengthy Questions (over 30 minutes) answered in person by phone						
On-Line Searches						
Bibliographies Prepared from data base(s) from other than data base(s)						
SDI Profiles Established						
SDI Reports Sent						
Interlibrary Loan Requests Taken						

### 5.3.2 Breakdown of Law Circulation

Figure 21 shows the breakdown by classification of law circulation. This is a monthly report this is analogous to the monthly breakdown of circulation. The categories represented by the classification numbers and the verbal descriptions represent the schedule for law developed by the Army Library.

The report contains a column for "in-house use." This information refers to items used in the Law Section and left on tables or carts. This is an optional category. The data elements are shown in Figure A-15.

### 5.4 Administrative Reports

Administrative Reports are those relating to the operation of the circulation system, that is the number and type of records added or deleted. This information is required not only to track conversion and retrospective cataloging, but also for the Monthly Activity Report.

The second type of report is the Monthly Manpower Report that contains information on the activities of all sections of the Readers' Services Branch.

These reports are detailed below.

#### 5.4.1 Daily Report on System Activities

The Report on System Activities is a log of records added and deleted and is shown in Figure 22. It is to be available on the screen and may be printed if needed.

**BREAKDOWN OF LAW CIRCULATION  
(DAY'S DATE)**

<u>CLASSIFICATION NUMBER</u>	<u>DESCRIPTION</u>	<u>NUMBER OF ITEMS CHECKED OUT</u>	<u>IN-HOUSE USE*</u>	<u>TOTAL CIRCULATION</u>
K	General			
KA 1 - 34.9	Const., Executive			
KA 35 - 43.9	Cong.-General, Debates			
KA 44 - 51.9	Bills, Digests, Calendars			
KA 52 - 54.9	Hearings			
KA 55 - 61.9	Reports, Docs., Comm. Prints			
KA 62 - 67.9	Cong. Misc.			
KA 70 - 89.9	Statutes and Codes			
KA 90 - 91.9	Special Laws by Subj.			
KA 92 - 99.9	Courts			
KA 100 - 104.9	Admin. Rules			
KA 110 - 116.9	U.S. Supreme Court Reports/Decision			
KA 120 - 138.9	Lower Court Reports/Decision			
KA 139 - 154.9	National Reporter System & Citators			
KA 155 - 162.9	Annotated Reports			

\* NOT ALWAYS TAKEN

FIGURE 21

MONTHLY REPORT ON LAW CIRCULATION

**BREAKDOWN OF LAW CIRCULATION  
(DAY'S DATE)**

<u>CLASSIFICATION NUMBER</u>	<u>DESCRIPTION</u>	<u>NUMBER OF ITEMS CHECKED OUT</u>	<u>IN-HOUSE USE*</u>	<u>TOTAL CIRCULATION</u>
KA 164 - 164.9	Digests			
KA 170 - 174.9	Adm. Law			
KA 175	State Material			
KC 1 - 4.9	General Treatise			
KC 5 - 9.9	Admin. of Justice			
KC 10 - 14.9	Administrative Law			
KC 15 - 19.9	Agency Law			
KC 20 - 24.9	Air Law			
KC 25 - 29.9	Arbitration and Award			
KC 30 - 34.9	Atomic Energy			
KC 35 - 39.9	Bailments			
KC 40 - 44.9	Bankruptcy			
KC 45 - 49.9	Banks and Banking			
KC 50 - 53.9	Bills and Notes			
KC 54 - 54.9	Business Law			

\* NOT ALWAYS TAKEN

**FIGURE 21 (Continued)  
MONTHLY REPORT ON LAW CIRCULATION**

BREAKDOWN OF LAW CIRCULATION  
(DAY'S DATE)

CLASSIFICATION NUMBER	DESCRIPTION	NUMBER OF ITEMS CHECKED OUT	IN-HOUSE USE*	TOTAL CIRCULATION
KC 55 - 59.9	Business and Professions			
KC 60 - 64.9	Carriers, Common			
KC 65 - 69.9	Communications			
KC 70 - 74.9	Comparative Law			
KC 75 - 79.9	Conflict of Law			
KC 80 - 84.9	Constitutional Law			
KC 85 - 94.9	Contracts			
KC 95 - 104.9	Criminal Law			
KC 105 - 106.9	Damages			
KC 107 - 107.9	Data Processing			
KC 110 - 114.9	Domestic Relations			
KC 115 - 119.9	Election Law			
KC 120 - 124.9	Equity			
KC 125 - 129.9	Evidence			
KC 130 - 134.9	Food, Drug and Cosmetics			

\* NOT ALWAYS TAKEN

FIGURE 21 (Continued)  
MONTHLY REPORT ON LAW CIRCULATION

**BREAKDOWN OF LAW CIRCULATION**  
(DAY'S DATE)

<u>CLASSIFICATION NUMBER</u>	<u>DESCRIPTION</u>	<u>NUMBER OF ITEMS CHECKED OUT</u>	<u>IN-HOUSE USE*</u>	<u>TOTAL CIRCULATION</u>
KC 135 - 139.9	Health, Ed. & Welfare, Private			
KC 140 - 144.9	Health, Ed. & Welfare, Pub.			
KC 145 - 149.9	Immigration and Nat.			
KC 150 - 151.9	Indians			
KC 152 - 154.9	Insurance			
KC 155 - 159.9	Jurisprudence			
KC 160 - 164.9	Labor			
KC 165 - 169.9	Law, History of			
KC 170 - 174.9	Liquor Laws			
KC 175 - 179.9	Maritime Law			
KC 180 - 184.9	Medical Jurisprudence			
KC 185 - 189.9	Mines and Mining			
KC 190 - 194.9	Mortuary Law			
KC 195 - 199.9	Motor Vehicle			
KC 200 - 204.9	Municipal Corp.			

\* NOT ALWAYS TAKEN

FIGURE 21 (Continued)  
MONTHLY REPORT ON LAW CIRCULATION



**BREAKDOWN OF LAW CIRCULATION  
(DAY'S DATE)**

CLASSIFICATION NUMBER	DESCRIPTION	NUMBER OF ITEMS CHECKED OUT	IN-HOUSE USE*	TOTAL CIRCULATION
KC 205 - 206.9	National Defense			
KC 207 - 209.9	Natural Resources			
KC 210 - 214.9	Oil and Gas Law			
KC 215 - 219.9	Partnership Law			
KC 220 - 224.9	Patents and Copyrt.			
KC 225 - 229.9	Practice and Procedure			
KC 230 - 234.9	Property, Personal			
KC 235 - 239.9	Property, Real			
KC 240 - 244.9	Public Lands			
KC 245 - 249.9	Public Officers			
KC 250 - 254.9	Public Utilities			
KC 255 - 259.9	Sales			
KC 260 - 264.9	Securities and Bonds			
KC 265 - 269.9	Statutory Construction			
KC 270 - 274.9	Streets and Highways			

\* NOT ALWAYS TAKEN

FIGURE 21 (Continued)  
MONTHLY REPORT ON LAW CIRCULATION

**BREAKDOWN OF LAW CIRCULATION  
(DAY'S DATE)**

<u>CLASSIFICATION NUMBER</u>	<u>DESCRIPTION</u>	<u>NUMBER OF ITEMS CHECKED OUT</u>	<u>IN-HOUSE USE*</u>	<u>TOTAL CIRCULATION</u>
KC 275 - 279.9	Surety and Guaranty			
KC 280 - 284.9	Tariff			
KC 285 - 289.9	Taxation			
KC 290 - 294.9	Torts			
KC 295 - 299.9	Trade Regulation			
KC 300 - 304.9	Trusts			
KC 305 - 309.9	Veterans			
KC 310 - 314.9	Waters and Water Rights			
KC 315 - 319.9	Wills and Estates			
KC 320 - 324.9	Workmen's Compensation			
KC 325 - 329.9	Zoning and Planning			
KM -	Military Law			

TOTAL MONTHLY CIRCULATION

\* NOT ALWAYS TAKEN

FIGURE 21 (Concluded)  
MONTHLY REPORT ON LAW CIRCULATION

DAILY REPORT ON SYSTEM ACTIVITIES

(DAY'S DATE)

RECORDS ADDED

NUMBER  
OF ITEMS

PATRON RECORDS  
CIRCULATION RECORDS

MONOGRAPHS  
SERIALS  
LAW ITEMS

RECORDS DELETED

BIBLIOGRAPHIC  
PATRON

OTHER ACTIVITIES

BY CATALOGING  
DEPARTMENT

BY SYSTEM  
MONITOR

TOTAL

OCLC RECORDS BARCODED  
RETROSPECTIVE CATALOGING  
NEW BOOK CATALOGING

FIGURE 22

DAILY REPORT ON SYSTEM ACTIVITIES

The report also asks for information on which records represent new books, which are retrospective cataloging and what OCLC records have generated bar code labels.

#### 5.4.2 Weekly Summary of System Activities

Figure 23 shows the Weekly Summary of System Activities. It follows the same format as the Daily Report. The preceding week's activity is available on a screen on demand. The daily and weekly information will be printed in the Monthly Activity Report.

#### 5.4.3 The Monthly Activity Report

The report furnished by Readers' Services Branch states the activities daily with weekly cumulations for a given month. It combines the activities of the Circulation, Periodicals, Law and Reference Sections. The format for this report is shown in Figure 24.

WEEKLY REPORT ON SYSTEM ACTIVITIES

(DAY'S DATE)

RECORDS ADDED

NUMBER  
OF ITEMS

PATRON RECORDS  
CIRCULATION RECORDS

MONOGRAPHS  
SERIALS  
LAW ITEMS

RECORDS DELETED

BIBLIOGRAPHIC  
PATRON

OTHER ACTIVITIES

BY CATALOGING  
DEPARTMENT

BY SYSTEM  
MONITOR

TOTAL

OC LC RECORDS BARCODED  
RETROSPECTIVE CATALOGING  
NEW BOOK CATALOGING

FIGURE 23

WEEKLY REPORT ON SYSTEM ACTIVITIES

ACTIVITY	FIRST WEEK				SECOND WEEK				THIRD WEEK				FOURTH WEEK				FIFTH WEEK				TOTAL											
	M	T	W	TH	F	TOTAL	M	T	W	TH	F	TOTAL	M	T	W	TH	F	TOTAL	M	T		W	TH	F	TOTAL							
CIRCULATION:																																
Check-ins																																
Check-outs																																
Renewals																																
Reserves Placed																																
Overdue Notices Sent																																
Delinquent Borrower Letters Sent																																
Books Shelved																																
Shelves Read																																
INTERLIBRARY LOAN:																																
Loans to Other Libraries																																
Non-returnable Items																																

FIGURE 24  
MONTHLY ACTIVITY REPORT

ACTIVITY	FIRST WEEK				SECOND WEEK				THIRD WEEK				FOURTH WEEK				FIFTH WEEK				TOTAL
	M	T	W	F	M	T	W	F	M	T	W	F	M	T	W	F	M	T	W	F	
TOTAL																					
Items Borrowed																					
REFERENCE:																					
Short Questions Answered																					
Lengthy Questions Answered																					
On-line Searches																					
Bibliographies Prepared																					
(a) From data bases																					
(b) Manually																					
SDI Profiles Established																					
SDI Reports Sent																					

FIGURE 24 (Continued)  
MONTHLY ACTIVITY REPORT

ACTIVITY	FIRST WEEK					SECOND WEEK					THIRD WEEK					FOURTH WEEK					FIFTH WEEK					TOTAL										
	M	T	W	TH	F	TOTAL	M	T	W	TH	F	TOTAL	M	T	W	TH	F	TOTAL	M	T	W	TH	F	TOTAL	M		T	W	TH	F	TOTAL					
Inter-Library Loan Requests Taken																																				
SYSTEM ACTIVITIES:																																				
Records Added																																				
Records Deleted																																				
OCIC Records Barcoded																																				
Retrospective Cataloging (By System Monitor)																																				

FIGURE 24 (Concluded)

MONTHLY ACTIVITY REPORT



## 6.0 MANAGEMENT REPORTS: YEARLY

In addition to reports for the day-to-day operation of the library there are yearly status reports, yearly cumulations of statistics and a yearly report on library usage.

### 6.1 Status Reports

The end of the year requires an accounting of patrons and items. There are patrons whose privileges have expired during the year and have not been renewed; other patrons will be put on inactive status if their privileges are not exercised for two years. The library would also like a yearly account of lost books and a report of items on extended loan. Formats and matrices for these reports are given below.

#### 6.1.1 List of Patrons Whose Privileges Have Expired

Students and contractors have borrowing privileges limited by the end of the school term and the expiration date of their contractor, respectively. Many of these patrons are eligible for renewal, but they must supply the necessary paperwork. (Currently contractors are required to submit a letter every year supplying the contract number, its expiration date and the point of contact.) This list will help the library identify patrons whose privileges have expired and where there is a long-standing contractual relationship, the Army Library will be able to notify the contact person to renew the borrowing privileges. The format for the report is shown in Figure 25. Data elements are matched in Figure A-16. The patron ID will

LIST OF BORROWERS WHOSE PRIVILEGES HAVE EXPIRED

<u>PATRON ID</u>	<u>NAME</u>	<u>TELEPHONE NUMBER</u>	<u>CONTACT PERSON*</u>	<u>DATE PRIVILEGES EXPIRED</u>
----------------------	-------------	-----------------------------	----------------------------	------------------------------------

\* For Contractor's Library

FIGURE 25

LIST OF BORROWERS WHOSE PRIVILEGES HAVE EXPIRED

indicate whether the patron is a student or a contractor. Since most of the contractors order through the company library, this report calls for the name of the contact person or librarian for interlibrary loan.

#### 6.1.2 List of Inactive Patrons

It is library policy to purge the system of patrons who have not exercised their borrowing privileges in over two years. This report gives the names of patrons purged at the end of a given year. It is kept primarily for back-up. (See Figure 26).

#### 6.1.3 List of Lost Items

The List of Lost Items is generated at the end of the year or as needed. It is concerned primarily with monographs because there are always multiple copies of periodicals. Monographs are arranged by call number. The date of publication, the number of recorded uses, and the existence (or non-existence) of multiple copies are all factors in determining whether a replacement copy should be purchased. Periodicals are arranged alphabetically by title. The volume number is included for bound periodicals.

The existence of multiple copies is not available in the data base.

The report also gives a summary of the number of lost books reported each month and a total for the year. (See Figure 27).

LIST OF INACTIVE PATRONS

(DATE)	PATRON RANK	PATRON NAME	DATE OF RECORD ENTRY	DATE LAST USED
--------	----------------	----------------	----------------------------	----------------------

Total Inactive Patrons

FIGURE 26

LIST OF INACTIVE PATRONS

<u>LIST OF LOST ITEMS</u>																		
<u>(DATE)</u>																		
<u>MONOGRAPHS</u>																		
<u>CALL NUMBER</u>	<u>AUTHOR/TITLE</u>	<u>DATE OF PUBLICATION</u>	<u>DATE REPORTED LOST</u>	<u>NUMBER OF USES RECORDED</u>	<u>NUMBER OF MULTIPLE COPIES</u>													
<u>SERIALS</u>																		
<u>TITLE</u>	<u>VOLUME/ISSUE/PART</u>	<u>DATE REPORTED LOST</u>	<u>NUMBER OF USES RECORDED</u>	<u>NUMBER OF MULTIPLE COPIES</u>														
<u>SUMMARY:</u>																		
<u>NUMBER OF LOST BOOKS REPORTED</u>																		
						JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL

FIGURE 27

LIST OF LOST ITEMS

#### 6.1.4 List of Items on Extended Loan

This report is essentially for inventory. It lists those items (usually monographs) that have been checked out to VIPs. It is arranged by call number. A critical piece of information is the number of additional copies; if the item checked out is of current publication and the library's sole copy, it may need to be recalled. Therefore, the patron's name (including rank) and telephone numbers are required for the report. (See Figure 28).

#### 6.2 Summary of Readers' Services Activities For The Year

The Summary of Readers' Services Activities is a year-end compilation of the monthly inputs to the Army Library's Activity Report. It shows activities broken down by section for each month and a cumulation for the year. The format is shown in Figure 29; the activities listed are identical to those in Figure 24.

#### 6.3 Usage Reports

These reports enable the staff to determine how the collection is being used and by whom. The following reports are included in this section.

- o Yearly Breakdown of Circulation by Classification.
- o Ranking of Periodicals by Usage.
- o List of Monographs Not Circulating.
- o Users' Survey.

LIST OF ITEMS ON EXTENDED LOAN

(DATE)

<u>CALL NUMBER</u>	<u>AUTHOR/TITLE</u>	<u>DATE OF PUBLICATION</u>	<u>DATE CHECKED OUT</u>	<u>NUMBER OF ADDITIONAL COPIES</u>	<u>PATRON (NAME &amp; RANK)</u>	<u>TELEPHONE NUMBER</u>
--------------------	---------------------	----------------------------	-------------------------	------------------------------------	---------------------------------	-------------------------

NUMBER OF ITEMS ON EXTENDED LOAN \_\_\_\_\_

FIGURE 28

LIST OF ITEMS ON EXTENDED LOAN

<u>SUMMARY OF READERS' SERVICES ACTIVITIES FOR THE YEAR</u>													
(DATE)													
ACTIVITY	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL
SAME AS													

FIGURE 29  
SUMMARY OF READERS' SERVICES FOR THE YEAR



#### 6.3.1 Yearly Breakdown of Circulation by Classification

This report shown in Figure 30, gives monthly and yearly figures for circulation of items in the classification categories established by the Army Library. It also gives a yearly figure for internal circulation, check-outs, and a combined total of both.

#### 6.3.2 Report on Non-Circulating Material

The purpose of this report is to identify items of low demand that might be weeded from the collection. However, failure to circulate is not the only criterion for removal. Military items are always retained for historical value.

The report is organized according to call number. For each item the author, title, publication date, and date last used are required. The report also calls for the number of items in a classification category that are non-circulating. For the purposes of this report Library of Congress letters A-Z will be used without further subdivision. The format of the report is shown in Figure 31, the data elements in Figure A-20.

#### 6.3.3 Ranking of Periodicals by Use

This report requires information about titles rather than items. Periodicals are divided into four classes.

- o Military, English language
- o Military, Foreign language
- o Non-military, English language
- o Non-military, Foreign language

and ranked within each category in descending order of use.

YEARLY BREAKDOWN OF CIRCULATION BY CLASSIFICATION																
(DATE)																
TOTAL CIRCULATION CLASSIFICATION NUMBER	DESCRIPTION	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	YEARLY CIRCULATION		PERCENT OF TOTAL CIRCULATION
														INTERNAL	CHECKED OUT	
														TOTAL		
SAME AS WEEKLY BREAKDOWN FIGURE 14																

FIGURE 30

YEARLY BREAKDOWN OF CIRCULATION BY CLASSIFICATION

<u>REPORT ON NON-CIRCULATING MATERIAL</u>					
(Arranged according to classification number)					
<u>CALL NUMBER</u>	<u>AUTHOR/TITLE</u>	<u>(DATE)</u>		<u>NUMBER OF ITEMS PER CLASSIFICATION CATEGORY</u>	<u>TOTAL</u>
		<u>PUBLICATION DATE</u>	<u>DATE LAST USED</u>		
<u>MONOGRAPHS</u>					
A					
0					
0					
0					
SUBTOTAL FOR A CLASSIFICATION					
B					
0					
0					
F					
0					
0					
Z					
TOTAL MONOGRAPHS NOT CIRCULATING					

FIGURE 31

REPORT ON NON-CIRCULATING MATERIAL

"Use" is defined as total circulation, that is, the number of times an item was checked out of the library and the number of times it was used within the library. This internal use requires a separate register not presently planned for. "Use" also refers to the total usage for all issues and copies of issues for that title.

The format is shown in Figure 32 and the data elements (for the item, not the title) are matched in Figure A-21.

#### 6.3.4 The Users Survey

This survey focuses on the various types of patrons served by the Army Library and examines how they use library services. Patrons or borrowers are classed as regular active duty military, retired military, libraries and other. Military borrowers include Army, Air Force, Marine, Navy and DoD civilian personnel. Military and civilian employees of the Office of the Secretary of Defense (OSD) and the Joint Chiefs of Staff (JCS) are treated separately. Libraries include Army, other military, Federal (excluding military), contractor, and other. These "other libraries" could be college or university, or special libraries that do not have a contractor relationship to the military. These categories are constant across the reports that make up the User Survey. These reports are as follows:

- o Report on Registered Borrowers.
- o Report on Non-Users.
- o Report on Usage-Circulation.
- o Report on Usage - Reference.

RANKING OF PERIODICALS BY USE (Arranged in descending order)					
TYPE	RANK	TITLE	AMOUNT OF INTERNAL CIRCULATION	NUMBER OF TIMES CHECKED OUT	TOTAL USAGE
MILITARY, ENGLISH LANGUAGE:	1				
	.				
	.				
MILITARY, FOREIGN LANGUAGE:	1				
NON-MILITARY, ENGLISH LANGUAGE:	1				
NON-MILITARY, FOREIGN LANGUAGE:					

FIGURE 32

RANKING OF PERIODICALS BY USE

6.3.4.1 Report on Registered Borrowers. This section of the Users Survey breaks down the number of registered borrowers by service and rank. (See Figure 33). The ranks, which are represented by I through VI, represent flag officers, field grade officers to enlisted men, and the corresponding GS ranks. The ranks will have to be aggregated since Major, Lt. Col. and Colonel, for example, are all Rank III. This rank assignment is to be reflected in the design of the patron's bar coded ID number.

6.3.4.2 Report on Non-Users. This report groups the non-users by service and rank. The format is shown in Figure 34.

6.3.4.3 Report on Usage - Circulation Breakdown. The Circulation Breakdown requires information on what a patron uses - monographs, serials or law items. At present the patron record contains only the total uses and does not distinguish the type of material. The format is shown in Figure 35.

6.3.4.4 Report on Usage - Reference. The information for this report is gleaned from the individual reference librarian's Summary of Reference Activity. The categories of reference actions are taken from that report. For the format see Figure 36.

USERS SURVEY REPORT ON REGISTERED BORROWERS										
PATRON RECORDS AT BEGINNING OF THE YEAR					NUMBER					
PATRON RECORDS ADDED										
PATRON RECORDS DELETED										
CURRENT NUMBER OF REGISTERED BORROWERS										
TYPE OF BORROWER	TOTAL FOR EACH CATEGORY	% OF REGISTERED BORROWERS	ACCORDING TO RANK							
			I	II	III	IV	V	VI		
REGULAR MILITARY										
ARMY										
AIR FORCE										
MARINE										
NAVY										
DoD CIVILIAN										
OSD										
JCS										
RETIRED MILITARY										
ARMY										
AIR FORCE										
MARINE										
NAVY										
OTHER BORROWERS										
STUDENTS										
TEMPORARY										
LETTARIES (TOTAL ILL)										
ARMY										
OTHER MILITARY										
FEDERAL (EXCLUDING MILITARY)										
CONTRACTOR										
MISC.										

FIGURE 33  
USERS SURVEY: REPORT ON REGISTERED BORROWERS

USERS SURVEY REPORT ON NON-USERS		NUMBER							
NUMBER OF REGISTERED BORROWERS		# OF NON-USER FOR EACH CATEGORY	% OF NON-USERS	ACCORDING TO RANK					
NUMBER OF NON-USERS (Registered borrowers who have not checked items out of the library during the year)				I	II	III	IV	V	VI
NON-USERS AS A PERCENT OF REGISTERED BORROWERS									
TYPE OF BORROWER									
REGULAR MILITARY									
ARMY									
AIR FORCE									
MARINE									
NAVY									
DoD CIVILIAN									
OSD									
JCS									
RETIRED MILITARY									
ARMY									
AIR FORCE									
MARINE									
NAVY									
OTHER BORROWERS									
STUDENTS									
TEMPORARY									
LIBRARIES (TOTAL ILL)									
ARMY									
OTHER MILITARY									
FEDERAL (EXCLUDING MILITARY)									
CONTRACTOR									
MISCELLANEOUS									

FIGURE 34  
USERS SURVEY: REPORT ON NON-USERS



**USERS SURVEY  
REPORT ON USAGE - CIRCULATION BREAKDOWN**

NUMBER  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

NUMBER OF ITEMS CIRCULATING  
NUMBER OF MONOGRAPHS CIRCULATING  
NUMBER OF SERIALS CIRCULATING  
NUMBER OF LAW ITEMS CIRCULATING

TYPE OF BORROWER	TOTAL FOR EACH CATEGORY	M S L	M S L	M S L	ACCORDING TO RANK														
					I	II	III	IV	V	VI									
					M S L	M S L	M S L	M S L	M S L	M S L									
REGULAR MILITARY ARMY AIR FORCE MARINE NAVY DoD CIVILIAN OSD JCS RETIRED MILITARY ARMY AIR FORCE MARINE NAVY																			
OTHER BORROWERS STUDENTS TEMPORARY LIBRARIES ARMY OTHER MILITARY FEDERAL (EXCLUDING MILITARY) CONTRACTOR MISCELLANEOUS																			

FIGURE 35  
USERS SURVEY: REPORT ON USAGE - CIRCULATION BREAKDOWN

USERS SURVEY

REPORT ON USAGE - REFERENCE

TYPE OF BORROWER	NUMBER OF REFERENCE ACTIONS	SHORT QUESTIONS	LENGTHY QUESTIONS	BIBLIO-GRAPHIES	ON-LINE SEARCHES	SDJ PROFILES	SDI REPORTS
<u>REGULAR MILITARY</u> ARMY AIR FORCE MARINE NAVY <u>DoD CIVILIAN</u> OSD JCS <u>RETIRED MILITARY</u> ARMY AIR FORCE MARINE NAVY							
<u>OTHER BORROWERS</u> STUDENTS TEMPORARY <u>LIBRARIES</u> ARMY OTHER MILITARY FEDERAL (Ex- cluding military) CONTRACTOR MISCELLANEOUS TOTAL FOR EACH CATEGORY							

FIGURE 36  
USERS SURVEY: REPORT ON USAGE - REFERENCE

## 7.0 MISCELLANEOUS REPORTS

There are two yearly reports that must be prepared by the Army Library that either relate to the use of the circulation system or for which circulation statistics are required. These reports are the Survey of Federal Libraries, and the Yearly Report in Compliance with the Privacy Act.

### 7.1 The Survey of Federal Libraries

This survey is an extensive form which requests information on holdings, staffing, extent of automation, etc. Its format is not fixed. The following elements could be obtained from the circulation and management statistics.

- Number of volumes (excluding bound periodicals). This will be available only when conversion is complete.
- Number of bound periodicals.
- Total circulation of all materials to library users.
- Interlibrary loans provided to other libraries.
- Interlibrary loans received.
- Reference transactions per typical week (from Manpower Reports).
- On-line reference transactions per typical week.

If title information is available, it is requested for the number of monograph titles, periodical titles and technical reports.

## 7.2 Privacy Act Requirements

The Army Libraries as a group have filed a request to collect information for patron cards and patron records. Presumably the reporting requirements (how many people required access to these records other than usual staff) will be waived.

## 8.0 SUMMARY

Table I is a summary of the reports required by the Army Library. It is arranged by category (correspondence, patron or management reports), and indicates the frequency, format and use of each report. Missing data elements and explanatory notes have been included. The matrices which match report elements against record data elements follow in Appendix A.

This chapter specifically discusses data elements missing from the preliminary record design and their importance for the library; it also summarizes the transactions the library wishes to monitor. And finally, the question of flexibility and change in reporting needs is addressed.

## 8.1 Data Elements

In general, required data for reports can be extracted from the records as currently designed. A list of missing elements follows:

- o language,
- o designation as military or non-military,
- o key word descriptors (optional),
- o publisher and place of publication
- o pagination, and
- o date of record entry.

Designation of a periodical as military or non-military, and of language may be added to the main record. Language is an important item characteristics for libraries other than the Army Library. Use

TABLE I  
SUMMARY TABLE OF REPORTS FOR ARMY LIBRARY

NAME OF REPORT	FREQUENCY	WHEN GENERATED	FORMAT	DISTRIBUTED TO	USE	REPORT ELEMENTS MISSING	NOTES
CORRESPONDENCE; COURTESY NOTICE	each week alphabetically by patron last name	3/4 patrons each week if items are overdue	Letter with Army Library Heading	Patrons with overdue books	To remind patrons to re- turn books		Overdue items to be noted with asterisk
ALTERNATE OVERDUE NOTICE	Daily	One week after item falls overdue	Letter with Army Library Heading	Patrons with overdue books	Same as above	Number of times a partic- ular item is reported overdue	All items due and a date should appear in one notice. OPTIONAL
DELINQUENT BORROWERS LETTER	Monthly	After an item is several months over- due	Letter with Army Library Heading	Patrons with overdue books	Same as above		
INTERLIBRARY LOAN STATUS REPORT	Monthly		Printout with Army Library Heading	Libraries who have borrowed books on inter- library loan			
RESERVE NOTICES		Whenever an item re- turned has a reserve posted	Letter with Army Library Heading	Patrons	To notify them of items on reserve		Optional for Army Library
INVENTORY REPORT FOR ITEMS ON EXTENDED LOAN	Monthly		Letter with Army Library Heading	VIP Patrons	Inventory control and to retrieve items no longer needed		Date due may read "extended loan"

TABLE 1 (Continued)

NAME OF REPORT	FREQUENCY	WHEN GENERATED	FORMAT	DISTRIBUTED TO	USE	REPORT ELEMENTS TO BE REPORTED	NOTE:
RECEIPT FOR CHECK- IN MANAGEMENT REPORTS LIST OF SHORT-TERM LOANS	Daily	At patron request Early morning	3 separate sections	Patrons Serials Law Circulation Sections	To retrieve items loaned overnight or for short notices		Optional for Army Library Date checked out for date last used
PATRON LIST	Weekly		Printed, alphabetical by patron last name	Circulation desk	Backup for system failure	Reason for denial of service	Associated message Give reason for denial of service
LIST OF MISSING ITEMS	Monthly		Printed, arr by call #	Circulation section	For searching shelves for missing items	Dates on which item is searched	
DAILY CIRCULATION SUMMARY	Daily	On demand	Screen	N/A	Input to monthly manpower report	(1) Internal circulation (2) Identification of non- returnable items	
WEEKLY CIRCULATION SUMMARY	Weekly	On demand	Screen	N/A	Input to monthly manpower report		
WEEKLY BREAKDOWN OF CIRCULATION	Weekly	End of the week/ beginning of follow- ing week	Printed		(1) To determine usage of the collection by classification (2) Input to yearly study	(1) Description of classi- fication categories (2) Identification of serials as military, English language mili- tary, foreign language non-military, English non-military, foreign (Same as above)	
MONTHLY BREAKDOWN ON CIRCULATION	Monthly	End of the calendar month	Printed		Same as above		

TABLE 1 (Continued)

NAME OF REPORT	FREQUENCY	WHEN GENERATED	FORMAT	DISTRIBUTED TO	USE	REPORT ELEMENTS MISSING	NOTES
REFERENCE LIBRARIAN'S SUMMARY OF DAY'S ACTIVITY	Daily	End of day	Screen for inputting information	N/A	Input to manpower report		
DAILY SUMMARY OF REFERENCE ACTIVITY	Daily	On demand	Screen	N/A	(Same as above)		
MONTHLY REPORT ON LAW CIRCULATION	Monthly	End of calendar month	Printed	Law Section	To determine	Description of classification category	
DAILY REPORT ON SYSTEM ACTIVITY	Daily	On demand	Screen	N/A	Input to monthly manpower report	Need to distinguish between new items being catalogued and retrospective cataloging	
WEEKLY REPORT ON SYSTEM ACTIVITY	Weekly	On demand	Screen	N/A	Input to monthly manpower report		
MONTHLY MANPOWER REPORT	Monthly	End of the month	Printed list	Library Supervisor	Required for Army		
LIST OF PATRONS WHOSE PRIVILEGES HAVE EXPIRED	Every year for those		Printed list	ILL desk	Will be used to remind patrons to renew privileges and update information		For ILL contractor librarian only
LIST OF INACTIVE PATRONS	Every 2 years	End of the year	Printed list	Archives	For records only - once file is purged		



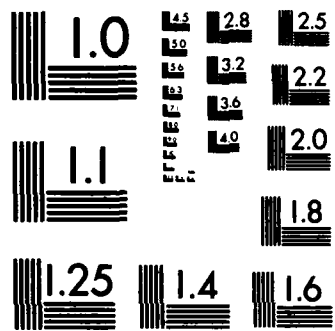
TABLE I (Continued)

NAME OF REPORT	FREQUENCY	WHEN GENERATED	FORMAT	DISTRIBUTED TO	USE	REPORT ELEMENTS MISSING	NOTES
LIST OF LOST BOOKS	Every year	End of the year	Printed list	Section group	May be used to purchase replacements	(1) Number of multiple copies (2) Date reported lost	
LIST OF ITEMS ON EXTENDED LOAN	Every year	End of the year	Printed list	Library supervisor	For inventory	Number of multiple copies	
YEARLY SUMMARY OF READERS SERVICES	Every year	End of the year	Printed list	Library supervisor		ALL - Generated from reference librarian's daily input	
YEARLY BREAKDOWN OF CIRCULATION BY CLASSIFICATION (INCLUDE LAW)	Yearly	End of the year	Print		Help determine usage of collection	(1) Internal circulation (2) Classification descriptions	
REPORT ON NON-CIRCULATING MATERIAL	Yearly	End of the year	Print		For weeding and review of selection procedures		
RANKING OF PERIODICALS BY USE	Yearly	End of the year	Print		For review of subscriptions	(1) Type of periodical (bar-code may carry title) (2) Really need title information	
USERS SURVEY REGISTERED BORROWERS	Yearly	End of the year	Print	Library supervisor	Funding Public relations	(1) Rank Groupings I-VI (may be in bar-code)	

TABLE 1 (Concluded)

NAME OF REPORT	FREQUENCY	WHEN GENERATED	FORMAT	DISTRIBUTED TO	USE	REPORT ELEMENTS MISSING	NOTE
USERS SURVEY NON-USERS		(SAME AS ABOVE)					
USERS SURVEY USAGE-CIRCULATION BREAKDOWN							
USERS SURVEY USAGE-REFERENCE							
REPORTS FOR PATRONS: BIBLIO. RAPIDS	Monthly	At intervals	Uses biblio- graphic citations	Patrons	(1) To encourage use of collection (2) Provide a users service	From daily Reference screen  (1) Publishing information or city of publication and publisher. (2) For serials-author, article title (3) Pagination	
CURRENT AWARENESS- NEW ACQUISITIONS	Monthly	Beginning of month	Uses biblio- graphic citations	Patrons		(1) Must identify MEM items catalogued (2) Bibliographic - city, publisher (3) Pagination	
REF. REPORTS	Depends on profile		Uses biblio- graphic citations	Patrons		(1) Bibliographic (name as above) (2) Pagination (3) Possibly a category for added descriptors.	





MICROCOPY RESOLUTION TEST CHART  
NATIONAL BUREAU OF STANDARDS-1963-A

grammars, dictionaries, as well as foreign language material interspersed throughout the general collection, is frequently unknown or not evaluated.

The number of multiple copies of a title is useful both for weeding and for determining if lost items should be replaced. This information may be available if the main record for the title contains a list of the codes for the individual item activity records. However, such a system would not distinguish volumes in a set from multiple copies.

The most serious deficiencies are in the bibliographic reports. The main record currently lacks such standard bibliographic information as publisher and place of publication but these are easily supplied. The Army Library now supplies pagination for bibliographic entries and would like to continue to do so. The length of an item is an important criterion for some patrons. An enhancement would be the assignment of controlled descriptors; this would be valuable for SDI reports where topics are more narrowly defined than are Library of Congress subject headings. The current awareness reports might require a date for record entry to identify new acquisitions. (This would also be useful for tracking an item's usage over a period of years.)

## 8.2 The Transaction Log

Three reports - the Summary of Circulation Activity (Figure 15), the Report on System Activity (Figure 23), and the Monthly Activity

Report (Figure 24) - define the types of activities the library administration wishes to monitor. Most of these activities are self-explanatory and will be monitored by the system as designed. A few require some explanation; these are as follows:

- o internal circulation,
- o circulation of non-returnable items,
- o number of overdue books returned, and
- o reference activities.

Internal circulation involves tracking materials used within the library, for example, reference books or periodicals in a reading room. Any library that restricted circulation, particularly if the staff accessed items for the patrons, would like a measure of this service separate from the general circulation statistics.

Circulation of non-returnable materials may become more important as copyright legislation is revised. Most, but not all, of the non-returnable items are photocopies of articles. The remainder is ephemeral material not controlled by the library.

The Army Library would like a count of how many items returned each day are overdue. At present, overdue books are a problem and the library administration wishes to evaluate the policy of sending out overdue and courtesy notices. This need, however, is not restricted to that particular use. The borrowing period for books should be evaluated not only in general, but also for specific items.

Some item or classes of items may require a longer borrowing period and since this system is flexible enough to permit variable loans, there should be a way of tracking overdues.

The reference activities, as noted previously require a daily input from the reference librarians. The daily screen and the weekly report derived from it reflect services currently provided. As services are added it will become necessary to modify this part of the reporting system.

### 8.3 Other Considerations

As recorded here, the requirements reflect a static set of reports. As the library administration begins to collect and evaluate these statistics, it may recognize additional reports are needed both for control and for evaluation of library services. Even within current reports, changes in format should be anticipated; for example, the breakdown of circulation by classification reflects current subject areas of interest. After the system is in operation it may be discovered that some of these categories have such low circulation that they could be combined. Similarly a section of the collection may expand and need to be tracked separately.

There is a need, therefore, to make the reporting capabilities more flexible, both in terms of content and format. One way to do this would be to provide the capability to set up (and change) its own descriptions for both the collection and its patrons. This could be evaluated and, if necessary, changed over time.

There is a similar concern with report formats. It is probable that only a piece of a current report might be required; for example, services to other libraries could be extracted from the users' report. Also, the arrangement of data could be changed; the circulation report could be structured to rank classification categories according to their circulation.

A reports generator has been discussed as part of the Integrated Library System. Because reporting needs can be expected to change it is an option that should be explored further.



APPENDIX A  
REPORT MATRICES









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		NAME	
		LAST	
		FIRST	
		MIDDLE	
		SUFFIX	
		NICKNAME	
		ALIAS	
		CALLENDAR	
		TELEPHONE	
		ADDRESS	
		CITY	
		STATE	
		COUNTRY	
		ZIP	
		DATE	
		TIME	
		ITEM ID	
		INTERNAL ID	
		NO. 1	
		ISSUE - PART 1	
		TYPE OF ITEM	
		ISSUE 1	
		REF. CIRC. SER.	
		CALL 1	
		PUB DATE	
		ISSUES	
		LAST PUBLISHED	
		STATUS CODE	
		ISS DATE	
		PATRON ID	
		DATE ITEM LAST	
		USED	
		TOTAL # OF ISSUES	
		TOTAL RECEIVED	
		RECEIVED FOR	
		ASSOCIATED	
		RECORDS	
		NAME	
		TYPE	
		NAME OR TITLE	
		SERVICE	
		AGENCY SYMBOL	
		HOME ADDRESS	
		HOME PHONE	
		ROOM NUMBER	
		DATE OF RECORD	
		ISSUE	
		ISS PROFILE	
		EXPIRATION DATE	
		SUBJECT OR KEY	
		DATE LAST USED	
		HOME ADDRESS	
		HOME PHONE	
		CONTACT	
		DATE CONTRACT	
		EXPIRES	
		SCHOOL	
		AFFILIATED*	
		DATE SCHOOL	
		EXPIRES	
		POINT OF	
		CONTACT	
		BAR CODE	
		1, 2, 3	
		RELATIVES	
		ISSUE PROFILE	
		TOTAL ISSUES	
		ISSUE 1	
		ISSUE 2	
		ISSUE 3	
		ISSUE 4	
		ISSUE 5	
		ISSUE 6	
		ISSUE 7	
		ISSUE 8	
		ISSUE 9	
		ISSUE 10	
		ISSUE 11	
		ISSUE 12	
		ISSUE 13	
		ISSUE 14	
		ISSUE 15	
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		ISSUE 92	
		ISSUE 93	
		ISSUE 94	
		ISSUE 95	
		ISSUE 96	
		ISSUE 97	
		ISSUE 98	
		ISSUE 99	
		ISSUE 100	

ITEM NO.	DESCRIPTION	QTY	UNIT	AMOUNT	DATE
1	...				
2	...				
3	...				
4	...				
5	...				
6	...				
7	...				
8	...				
9	...				
10	...				
11	...				
12	...				
13	...				
14	...				
15	...				
16	...				
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37	...				
38	...				
39	...				
40	...				
41	...				
42	...				
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45	...				
46	...				
47	...				
48	...				
49	...				
50	...				

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FILE ELEMENT REPORT ELEMENT	CIRCULATION ITEM MAIN RECORD												ITEM ACTIVITY RECORD												CONTRIBUTIONS						
	LC CARD #	ISSN	ISSN	LOCAL CALL #	(AUTHOR MAIN ENTRY)	TITLE STATEMENT	DATE OF PUBLICATION	SERIES STATEMENT, CODE	SUBJECT HEADINGS	ITEM ID	INTERNAL ID	VOL. #	ISSUE - PART #	TYPE OF ITEM	COPIES	REF. CONC DIS.	CALL #	PUB. DATE	MAXIMUM LOAN PERIOD	STATUS CODE	DEL DATE	PATRON ID	DATE ITEM LAST USED	TOTAL # OF USES	TOTAL RESERVES	RESERVED FOR	ASSOCIATED MESSAGE	TOTAL	SUBTOTAL	PERCENT	
SUBJECT HEADINGS																															
EXTENSIONS IN TITLE*																															
<u>MONOGRAPHS</u>																															
AUTHOR																															
TITLE																															
PUBLISHER*																															
DATE OF PUBLICATION																															
PAGINATION*																															
CALL NUMBER																															
<u>PERIODICAL ARTICLES</u>																															
AUTHOR*																															
TITLE*																															
PERIODICAL TITLE																															
VOLUME																															
DATE*																															
PAGINATION*																															

FIGURE A-8  
BIBLIOGRAPHICS MATRIX

REPORT ELEMENT \ FILE ELEMENT	LC CARD #	ISBN	ISSN	LOCAL CALL. #	(AUTHOR) MAIN ENTRY	TITLE STATEMENT	DATE OF PUBLICATION	SERIES STATEMENT, CORP	SUBJECT HEADING
CIRCULATION ITEM MAIN RECORD									
IDENTIFICATION AS NEW ITEM*									
SUBJECT									✓
AUTHOR					✓				
PUBLISHER*									
PUBLICATION DATE							✓		
PAGINATION*									
CALL NUMBER					✓				

FIGURE A-9

CURRENT AWARENESS REPORTS MATRIX



DESCRIPTION	DATE	AMOUNT	ACCOUNT NO.	INITIALS
DEPOSIT				
ADVERTISING				
TREASURY				
PROPERTY				
REVENUE				
EXPENSES				
CONSTRUCTION				
REPAIRS				
MAINTENANCE				
OPERATING				
SALES				
COMMISSIONS				
TAXES				
INTEREST				
CHARGES				
DISCOUNTS				
UNRECORDED				
RECEIPTS				
PAYMENTS				
BALANCE				
OPENING				
CLOSING				
TOTAL				

FILE ELEMENT	REPORT ELEMENT	NAME	TYPE	RANK OR TITLE	SERVICE	AGENCY SYMBOL	WORK ADDRESS	WORK PHONE	ROOM NUMBER	DATE OF RECORD	SDI PROFILE	EXPIRATION	SUBJECT IN SDI	DATE LAST USED	HOME ADDRESS	HOME PHONE	CONTACT	DATE CONTACT EXPIRES	SCHOOL AFFILIATION	DATE SCHOOL EXPIRES	POINT OF CONTACT	BAR CODE	I.D. #	MESSAGES	LOAN PERIOD	TOTAL USES		
LIST OF PATRONS  A. VALID PATRONS  PATRON NAME  PATRON RANK  PATRON ID NUMBER  WORK TEL. NUMBER  BORROWING PRIVILEGES (TO BE REFLECTED IN THE CODE)  ASSOCIATE MESSAGES  B. DELINQUENT PATRONS  PATRON NAME  PATRON RANK  PATRON ID NUMBER  WORK TEL. NUMBER  ASSOCIATED MESSAGES (TO GIVE REASON FOR DELINQUENCY OF SERVICE)	(DATE)																						>					
			>					>															>					

FIGURE A-12  
WEEKLY PATRON LIST MATRIX

FILE ELEMENT	REPORT ELEMENT	ITEM ID	INTERNAL ID	VOL. #	ISSUE - PART #	TYPE OF ITEM	COPY #	REF. CIRC DIS.	CALL #	PUB. DATE	PLANNED LOAN PERIOD	STATUS CODE	DOI DATE	PATRON ID	DATE ITEM LAST USED	TOTAL # OF USES	TOTAL RESERVES	RESERVED FOR	ASSOCIATED MESSAGES	LC CARD #	ISSN	ISSN	LOCAL CALL #	(AUTHOR) NAME	EDITOR	TITLE STATEMENT	DATE OF PUBLICATION	SERIES STATEMENT, CONT.	SUBJECT READING	TOTAL	SUBTOTAL	PERCENT				
		ITEM ID	INTERNAL ID	VOL. #	ISSUE - PART #	TYPE OF ITEM	COPY #	REF. CIRC DIS.	CALL #	PUB. DATE	PLANNED LOAN PERIOD	STATUS CODE	DOI DATE	PATRON ID	DATE ITEM LAST USED	TOTAL # OF USES	TOTAL RESERVES	RESERVED FOR	ASSOCIATED MESSAGES	LC CARD #	ISSN	ISSN	LOCAL CALL #	(AUTHOR) NAME	EDITOR	TITLE STATEMENT	DATE OF PUBLICATION	SERIES STATEMENT, CONT.	SUBJECT READING	TOTAL	SUBTOTAL	PERCENT				

FORM A-13  
LIST OF MISSING ITEMS MATRIX

FILE ELEMENT		ITEM ACTIVITY RECORD															COMPUTATIONS						
REPORT ELEMENT	FILE ELEMENT	ITEM ID	INTERNAL ID	VOL. #	ISSUE - PART #	TYPE OF ITEM	COPY #	REF. CIRC DIS.	CALL #	PUB. DATE	HAWKING	LOAN PERIOD	STATUS CODE	DOE DATE	PATRON ID	DATE ITEM LAST USED	TOTAL # OF USES	TOTAL RESERVES	RESERVED FOR ASSOCIATED MESSAGES	TOTAL	SUBTOTAL	PERCENT	
	MONOGRAPHS					>			>													>	
	CLASSIFICATION CATEGORY																					>	
	NUMBER OF USES PER ITEM DURING TIME PERIOD																						>
	DAY																						
	WEEKLY																						
	TOTAL																						>
	DESCRIPTION																						>
	SERIALS																						>
	MILITARY, English																						>
	MILITARY, Foreign																						>
	NON-MILITARY, English																						>
	NON-MILITARY, Foreign																						>

FIGURE A-14  
WEEKLY CIRCULATION REPORT MATRIX





FILE ELEMENT	PATRON RECORD
NAME	>
TYPE	
NAME OR TITLE	
SERVICE	
AGENCY SYMBOL	
WORK ADDRESS	
WORK PHONE	>
ROOM NUMBER	
DATE OF RECORD ENTRY	
SPI PROFILE	
EXPIRATION FILE	
SUBJECT IN SPI	
DATE LAST USED	
HOME ADDRESS	
HOME PHONE	
CONTACT	
DATE CONTACT EXPIRES	>
SCHOOL AFFILIATION	
DATE SCHOOL EXPIRES	>
POINT OF CONTACT	>
BAR CODE I.D. #	>
MESSAGES	
LOAN PERIOD	
TOTAL USIS	

FILE ELEMENT  
REPORT ELEMENT

DATE  
PATRON ID  
NAME  
TELEPHONE NUMBER  
CONTACT PERSON  
DATE PRIVILEGES EXPIRED

FIGURE A-16  
LIST OF PATRON'S WHOSE PRIVILEGES HAVE EXPIRED MATRIX

FILE ELEMENT	COMPUTATIONS	
	TOTAL	PERCENT
NAME	>	
TITLE		
RANK OR TITLE	>	
SERVICE		
AGENCY SYMBOL		
HOME ADDRESS		
HOME PHONE		
ROOM NUMBER		
DATE OF RECORD ENTRY	>	
SEC PROFILE		
EXPIRATION DATE		
SUBJECT IN SEC		
DATE LAST USED	>	
HOME ADDRESS		
HOME PHONE		
CONTACT		
DATE CONTACT		
EXPIRES		
SCHOOL AFFILIATION		
DATE SCHOOL EXPIRES		
POINT OF CONTACT		
BAF CODE		
I.D. #		
MESSAGE		
LOAN REGION		
TOTAL US\$		

DATE  
PATTERN NAME  
PATTERN NAME  
DATE OF RECORD ENTRY  
DATE LAST USED  
TOTAL

FIGURE A-17  
LIST OF INACTIVE PATRONS MATRIX

FILE ELEMENT REPORT ELEMENT	ITEM ACTIVITY RECORD													CIRCULATION ITEM MAIN RECORD														
	ITEM ID	INTERNAL ID	VOL. #	ISSUE - PART #	TYPE OF ITEM	COPY #	REF. CLAS DIS.	CALL #	PUB. DATE	MARKING	LOAN PERIOD	STATUS CODE	DUPLICATE	DATE ITEM LAST USED	TOTAL # OF USES	TOTAL RESERVES	RESERVED FOR	ASSOCIATED MESSAGES	LC CARD #	ISSN	ISSN	LOCAL CALL #	(AUTHOR) MAIN ENTRY	TITLE STATEMENT	DATE OF PUBLICATION	SERIES STATEMENT, COPY	SUBJECT READING	
DATE																												
MONOGRAPHS																												
STATUS																												
CALL NUMBER																												
AUTHOR																												
TITLE																												
DATE OF PUBLICATION																												
DATE REPORTED LOST*																												
NUMBER OF USES RECORDED																												
NUMBER OF MULTIPLE COPIES																												
SERIALS																												
STATUS																												
TITLE																												
VOL																												
ISSUE/PART																												
DATE REPORTED LOST*																												

FIGURE A-18  
LIST OF LOST ITEMS MATRIX



REPORT ELEMENT	TITLE ELEMENT	ITEM ID	INTERNAL ID	VOL. #	ISSUE - PART #	TYPE OF ITEM	COPY #	REF. CIRC. DIS.	CALL #	PUB. DATE	PLACING	LOAN PERIOD	STATUS CODE	DOB DATE	PATRON ID	DATE ITEM LAST USED	TOTAL # OF USES	TOTAL RESERVES	RESERVED FOR	ASSOCIATED MESSAGES	LC CARD #	ISSN	ISSN	LOCAL CALL #	(AUTHOR) MAIN ENTRY	TITLE STATEMENT	DATE OF PUBLICATION	PERIODICITY	SERIES STATEMENT, CONT.	SUBJECT READING	TOTAL	SERIAL	PERCENT						
DATE	(NUMBER OF USES)																																						
CALL NUMBER	AUTHOR																																						
TITLE	DATE OF PUBLICATION																																						
DATE LAST USED	SUBTOTAL																																						
TOTAL																																							

FIGURE A-20  
REPORT ON NON-CIRCULATING MATERIALS MATRIX



FILE ELEMENT	REPORT ELEMENT	COMPUTATIONS	
	NAME		
	TYPE	✓	
	RANK OR TITLE	✓	
	SERVICE	✓	
	AGENCY SYMBOL		
	WORK ADDRESS		
	WORK PHONE		
	ROOM NUMBER		
	DATE OF RECORD ENTRY		
	SPI PROFILE		
	EXPIRATION TIME		
	SUBJECT IN SPI		
	DATE LAST USED		
	HOME ADDRESS		
	HOME PHONE		
	CONTACT		
	DATE CONTRACT EXPIRES		
	SCHOOL AFFILIATION		
	DATE SCHOOL EXPIRES		
	POINT OF CONTACT		
	DAN CODE		
	I.D. #		
	REFERENCES		
	LOAN PERIOD		
	TOTAL USES	✓	
	TOTAL		✓
	SERIAL		✓
	PERCENT		

PAYMON TYPE  
 SERVICE  
 BANKS  
 TOTAL USES  
 SERIAL  
 MONOGRAPH  
 LAN  
 TOTAL  
 PERCENT

BANK MUST BE AGGREGATED INTO GROUPS I- VI

USE IS NOT BROKEN DOWN BY THE TYPE OF MATERIAL USED

FIGURE A-22  
USERS STUDY MATRIX

FULL ELEMENT		PARTIAL ELEMENT	
NAME			
TYPE	✓		
RANK OR TITLE	✓		
SERVICE	✓		
AGENCY SYMBOL			
WORK ADDRESS			
WORK PHONE			
ROOM NUMBER			
DATE OF RECORD ENTRY			
SBI PROFILE			
EXPIRATION DATE			
SUBJECT IN SBI			
DATE LAST USED			
HOME ADDRESS			
HOME PHONE			
CONTRACT			
DATE CONTRACT EXPIRES			
SCHOOL AFFILIATION			
DATE SCHOOL EXPIRES			
POINT OF CONTACT			
BAR CODE			
I.D. #			
MESSAGES			
LOW PERIOD			
TOTAL USES	✓		
TOTAL		✓	
SUBTOTAL			✓
PERCENT			✓

PAYROLL RECORD

CONTRIBUTIONS

MARK MUST BE ALLOCATED INTO GROUPS - VI

MEM-USE  
TYPE  
SERVICE  
RANK  
TOTAL  
PERCENT

FIGURE A-72 (Cont. from J)



FILE ELEMENT	PATRON RECORD	COMPUTATIONS
NAME		
TYPE		✓
NAME OR TITLE		✓
SERVICE	✓	
AGENCY SYMBOL		
WORK ADDRESS		
WORK PHONE		
ROOM NUMBER		
DATE OF RECORD		
DATE OF ENTRY		
SBI PROFILE		
EXPIRATION FILE		
SUBJECT IN SBI		
DATE LAST USED		
HOME ADDRESS		
HOME PHONE		
CONTACT		
DATE CONTACT		
EXPIRES		
SCHOOL AFFILIATION		
DATE SCHOOL		
EXPIRES		
POINT OF CONTACT		
RAF CODE		
I.D. #		
MESSAGES		
LAST PERIOD		
TOTAL USIS		
TOTAL		✓
SUBTOTAL		✓
PERCENT		✓

PATRON TYPE  
SERVICE  
NAME  
SUBTOTAL  
TOTAL  
PERCENT

✓

✓

✓

BANK MUST BE ALLOCATED INTO GROUPS - VI

FIGURE A-22 (Cont'd)

**END**

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**DTIC**