Virtual AskQC Office Hours
1, 2, 3, 4, 5: Everything you wanted to know about stats but were afraid to ask

OCLC Metadata Quality
Housekeeping

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- After the session you will be directed to a quick, optional survey
Special note
A second session on this topic will be offered on October 23 at 4 PM Eastern.
Registration is available at oc.lc/askqc
On the call today

Charlene Morrison  Database Specialist II
Patty Treboni  Database Specialist II
Cynthia Whitacre  Senior Metadata Operations Manager
Robin Six  Database Specialist II
Shanna Griffith  Database Specialist II
Laura Ramsey  Senior Metadata Operations Manager
Robert Bremer  Senior Consulting Database Specialist
Hello everyone, in this part of the discussion I will explain how to retrieve statistics for your library’s Connexion transactions or find your individual statistics.
Using the link above, adding your personal OCLC authorization and password, or any of your institution’s authorizations will give you access to all available reports for your institution. For now we will focus on Connexion.
I would like to say thanks to the University of Washington Library for kindly letting us use their statistics in the examples.

Statistics are usually viewable by the third calendar day of the following month. In this example September 2019 statistics were available to view September 2. Select the appropriate reporting period to see a list of reports available for that time. The default selection shows the history of the past 6 months, but you can choose to see the past 12 months by updating the search.
Click on the report group name (example: Institution : WAU) or the arrow before the authorization and password to expand the list of reports available under that grouping.
Select a report to view from the reports listed.
From the Institution monthly statistics choices, I have chosen to view more detailed information on WorldCat Record Actions by clicking on the hyperlink in the table.
Now each action is broken down and I can see that 3,943 WorldCat records were replaced in September.
Here we have a list of available individual monthly statistics choices for each available Authorization numbers for that institution. Selecting only one authorization by Monthly Usage, we can choose to see, for example the Authority record actions
Print reports
Select the landscape print format from your browser's Print option for best results.

Export reports
An Export button appears at the top right of each report screen once the report is open. Clicking the button pops up a File Download box with the options of Open, Save, Cancel, and More Info. Clicking Open will open the file in Microsoft® Excel. From there you can organize the data to fit your needs. To save the file, click File, Save or Save As, then select the desired directory/folder. Make sure the file type is Microsoft Excel Workbook (*.xls) before saving.
E-mail reports
An Email button appears at the top right of each report screen once the report is open. Clicking the button takes you to a screen where you can choose to send the report to one or more designated e-mail address(es). The E-mail button can also be used to set up an automatic e-mail feature that will send your designated reports on a monthly basis to the e-mail address(es) that you specify. Reports that you designate will be automatically e-mailed when the statistics for the previous timeframe become available.
You can set up an unlimited number of reports to be e-mailed.
You can specify the format of the e-mailed report: HTML or Microsoft Excel.
You can view a list of all of your designated e-mail reports by clicking List All. The list of e-mail reports is based on the authorization you used to access reports.
Help
Click the Help button on the top right of any screen to view help.
Statistics for Record Manager are accessed in a different place than the statistics for Connexion. To get to the statistics for Record Manager, one needs to log into their WorldShare account. Anyone with a cataloging subscription may get a WorldShare account to use Record Manager. If you need more information on how to do that, contact OCLC Support.
Once logged into WorldShare, go to the Analytics tab (noted by the blue arrow at the top of the screen). Then select reports over in the left column. The blue star is next to Reports. Then select Metadata (highlighted in yellow) and the list of statistical reports available appears. Then select whichever report you’d like. We’re going to look at *Monthly Record Manager Actions* (noted by the solid arrow in the middle of the screen).
On this Monthly Record Manager Actions screen you may select the period of the report. You can select one month or multiple months. The arrow shows you that only one month of September 2019 was selected in this case. Under Data Type in the middle of the screen you see the different types of data for which reports are available for the OCLC test symbol TS249. That includes bibliographic records and 2 different types of authority records. You’ll see the totals of actions over at the right of the screen. There are only 2 actions for bibliographic records in this case.
Here’s a look at that bibliographic records report with the 2 actions, one for setting holdings and another for replacing a record. While there are not many actions for this test account, the report will show you any actions like setting holdings, replacing records, exporting records, creating new records and so on. The arrow points to the download options of PDF or Excel for the report, if you wish to download the information.
Here’s a look at the Authority Records-LC report. If this were an account doing NACO work, there would be other actions like creating or editing records. But, as this TS249 account is not a NACO participant, it shows browsing and searching done in the LC authority file.

And, that’s it for Record Manager statistics.
Questions?

Please submit questions through chat
Thank you!

Send cataloging policy questions at anytime to:
askqc@oclc.org

Session links available at:
oc.lc/askqc

Next Virtual AskQC Office Hours:
Topic: Comparisons of searching in Connexion and Record Manager
Wednesday, November 13, 2019
1:00 PM Eastern
Registration available at oc.lc/askqc