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Learning Outcomes

WestPac participants will:
- Be able to access and navigate the ALLStAR portal, enter and submit local data to fulfill survey requests, and find data from a variety of sources including the ABA;
- Create basic and complex reports using ALLStAR’s built-in functions, (e.g., using multiple performance indicators from the ALLStAR data collections, applying filters, running and refining reports, creating graphs and tables, and downloading data into Excel) that will aid in the discussion of local personnel and financial resources with stakeholders;
- Create relevant, complex benchmarking reports from ALLStAR illustratng peer and aspirant institutions’ allocation of personnel and financial resources which will aid in explaining these resource allocation comparisons to local stakeholders;
- Identify best practices established by other libraries for possible local application to contribute to institutional effectiveness; and
- Learn best practices in data collection and analysis, including which data points can be valuable tools when combined.
Why Use ALLStAR?

- Organizing selective library data
- Reporting and analyzing data
- Illustrating peer and aspirant institutions' allocation of personnel and financial resources which will aid in explaining these resource allocation comparisons to local stakeholders through numbers and visualizations; also known as benchmarking
- Identifying best practices established by other libraries for possible local application to contribute to institutional effectiveness

END WHY USE ALLStAR?
ALLStAR Web Site

- ALLStAR is administrated through NELLCO
  https://www.nellco.org/

- use the dropdown menu at “Projects” and click on ALLStAR

- there is a dedicated help page within the ALLStAR section of the NELLCO website
  https://www.nellco.org/page/help

- it includes links to:
  + basic video tutorials mounted on YouTube; the videos are in high-definition and are caption-enable (you may turn captions on and off)
  + videos created by Counting Opinions which manages the ALLStAR portal
  + instructional documents used for past workshops in 2017 and 2018
ALLStAR Help

ALLStAR Benchmarking Help: Videos, Documents, Email, and Links to AALL Workshops

We have videos and workshop materials to help to learn and use ALLStAR Benchmarking.

VIDEOS

Please note that the videos in the table below are currently available through YouTube. Additionally, the videos are closed-captioned; click the "CC" button on the video to toggle the captions on or off.

<table>
<thead>
<tr>
<th>Video Title</th>
<th>YouTube URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing and Navigating the ALLStAR Portal</td>
<td><a href="https://youtu.be/2G6nYYRgFw">https://youtu.be/2G6nYYRgFw</a></td>
</tr>
<tr>
<td>Start a NEW Report</td>
<td><a href="https://youtu.be/BEIF55x-nw4">https://youtu.be/BEIF55x-nw4</a></td>
</tr>
<tr>
<td>Basic Report Settings</td>
<td><a href="https://youtu.be/hWoqbyTGwo">https://youtu.be/hWoqbyTGwo</a></td>
</tr>
<tr>
<td>Selecting Indicators</td>
<td><a href="https://youtu.be/6MtBHRJm/hzg">https://youtu.be/6MtBHRJm/hzg</a></td>
</tr>
<tr>
<td>Running a Basic Report</td>
<td><a href="https://youtu.be/6D2q6VFOZQE">https://youtu.be/6D2q6VFOZQE</a></td>
</tr>
<tr>
<td>Downloading Report Data to Spreadsheets</td>
<td><a href="https://youtu.be/LVCoNEWALVE">https://youtu.be/LVCoNEWALVE</a></td>
</tr>
<tr>
<td>Modifying an Existing Report</td>
<td><a href="https://youtu.be/53oi1gHcMw3I">https://youtu.be/53oi1gHcMw3I</a></td>
</tr>
<tr>
<td>Options Tab</td>
<td><a href="https://youtu.be/k_EGFXidSio">https://youtu.be/k_EGFXidSio</a></td>
</tr>
<tr>
<td>Filters</td>
<td><a href="https://youtu.be/s9Mx2IUSeAJA">https://youtu.be/s9Mx2IUSeAJA</a></td>
</tr>
<tr>
<td>Benchmarking Using the Locations Filter</td>
<td><a href="https://youtu.be/uZ0rMJXcvZg">https://youtu.be/uZ0rMJXcvZg</a></td>
</tr>
<tr>
<td>Using Two Surveys Simultaneously</td>
<td><a href="https://youtu.be/Co2wWfIYsw">https://youtu.be/Co2wWfIYsw</a></td>
</tr>
<tr>
<td>Report Types - Tables, and Options</td>
<td><a href="https://youtu.be/eKn9XnCI74">https://youtu.be/eKn9XnCI74</a></td>
</tr>
<tr>
<td>Report Types - Reports for a Single Year</td>
<td><a href="https://youtu.be/SqT8xFNVmmJk">https://youtu.be/SqT8xFNVmmJk</a></td>
</tr>
<tr>
<td>Report Types - Reports for Multiple Years</td>
<td><a href="https://youtu.be/hwQNnQdn0U3s">https://youtu.be/hwQNnQdn0U3s</a></td>
</tr>
<tr>
<td>Report Types - Comparing Two Indicators</td>
<td><a href="https://youtu.be/gW5-sJ65Jyk">https://youtu.be/gW5-sJ65Jyk</a></td>
</tr>
<tr>
<td>Report Types - Cross Tabs and Custom Formats</td>
<td><a href="https://youtu.be/FvCWLueP0jU">https://youtu.be/FvCWLueP0jU</a></td>
</tr>
</tbody>
</table>

Videos by Karen Kupiec of Counting Opinions:
- Introduction to ALLStAR (mp4)
- Creating Reports in ALLStAR (mp4)
- Create Your First Report in ALLStAR (mp4)

DOCUMENTS
- ALLStAR: Creating Reports (in pdf) by Counting Opinions
- the instructor's document (in pdf) from the ALLStAR workshop at Austin, 2017
- the instructor's document (in pdf) from the ALLStAR workshop at Baltimore, 2018

END ALLStAR WEB SITE
Accessing and Navigating the Portal

Starting Steps
- Log into ALLStAR
- Report and Data Inputs

Thank you for participating in ALLStAR Benchmarking!

END ACCESSING AND NAVIGATING THE PORTAL
Data Inputs

ALLStAR Official Survey
- ALLStAR has created a survey collection which incorporates all of the questions from ARL and ACRL (each library responds to the survey that aligns with their institution’s status), US News, and the "best of ABA."
  + this survey is currently being tested
- A couple of ABA questions were dropped because they were not as relevant as once thought. For example, ABA Q7a asked for the number of interlibrary loans requests sent from your library. Question ABA Q7b asked for the number of those requests which were filled. The ratio of 7a to 7b is a local “fill rate” which oftentimes is captured solely by the library as an internal metric.

ALLStAR is based upon four tiers.
- Survey collections for data input, and subsequent data reporting, are available based upon the tier to which the library is a subscriber.
- Therefore, you will see survey collections based upon your subscription.
  + the contents for Tiers 1 through 4 are detailed on the ALLStAR web site.

Click on Data Input
- Use for local input into the various surveys within ALLStAR
- Click on down arrow to choose the survey

Data Input

<table>
<thead>
<tr>
<th>SURVEY</th>
<th>-- Select --</th>
</tr>
</thead>
</table>

- Select a survey
- Select ABA

<table>
<thead>
<tr>
<th>Survey</th>
<th>ABA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Data Input

- Select USNWR
Data Input

<table>
<thead>
<tr>
<th>SURVEY</th>
<th>USNWR</th>
<th>PERIOD</th>
<th>FY 16-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>Yale University Lillian Goldman Law Library</td>
<td>Library Data</td>
<td></td>
</tr>
<tr>
<td>Library</td>
<td>USNWR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRINT TITLES (USNEWS 107)</td>
<td></td>
<td>388,361.00</td>
<td></td>
</tr>
<tr>
<td>MICROFORM TITLES (USNEWS 108)</td>
<td></td>
<td>40,880.00</td>
<td></td>
</tr>
<tr>
<td>ELECTRONIC TITLES OWNED (USNEWS 109)</td>
<td></td>
<td>370,758.00</td>
<td></td>
</tr>
<tr>
<td>OTHER NON-BOOK TITLES (USNEWS 110)</td>
<td></td>
<td>2,796.00</td>
<td></td>
</tr>
<tr>
<td>TOTAL TITLES (USNEWS 111)</td>
<td></td>
<td>802,995.00</td>
<td></td>
</tr>
<tr>
<td>VOLUMES (EXCLUDING MICROFORMS) (USNEWS 112)</td>
<td></td>
<td>1,046,876.00</td>
<td></td>
</tr>
<tr>
<td>VOLUMES EQUIVALENT MICROFORMS (USNEWS 113)</td>
<td></td>
<td>290,505.00</td>
<td></td>
</tr>
<tr>
<td>TOTAL VOLUMES AND VOLUME EQUIVALENTS AT END OF FY (USNEWS 114)</td>
<td></td>
<td>1,337,381</td>
<td></td>
</tr>
</tbody>
</table>

END DATA INPUTS
ALLStAR Employee Questionnaire

A major data entry form is ALLStAR’s Employee Questionnaire. Responses to this questionnaire “rolls up” from individual staff and can be summed for a library-wide perspective. Groups of indicators include:

+ Demographic Information about the employees
+ Librarian Load
+ Committee Work
+ Professional Development and Training
+ Independent Work
+ Administrative load
+ For-Credit Instruction
+ Not-for-Credit Instruction
+ Research
+ Training
+ Student Support
+ Alumni Support
+ Attorney, Pro Se Support
+ Other Patrons
+ Outreach
+ Outreach Participation
+ Outreach II
+ Outreach III
+ Acquisitions
+ Collections
+ Digital Projects
+ Website

This very comprehensive data collection will make it possible for ALLStAR participants to compare employee workloads and functions with other ALLStAR libraries.

Data Input
- Staff enter data to populate the questionnaire.

As a Report
- Add a new report, and select the Employee Questionnaire survey
  + Period = FY 15-16
  + gave the Report a name and a description
- I selected a few of the many interesting indicators in this survey
  + SAVE
- Look at the values
- RUN
- The more libraries that contribute to the EQ, the more data available to sort and review.
  + one can analyze FTE efforts based upon these values
  + also, calculate derived ratios such as how many consultations with students per student headcount
  + as additional libraries complete the EQ, the responses could be used for benchmarking studies and for best practices.
END ALLStAR EMPLOYEE QUESTIONNAIRE
Portal Tabs

- Tabs: Local and ALLStAR
- Please note: your screens may appear to be different based upon your ALLStAR subscription.

Under ALLStAR Tab

+ Documentation
  * Creating Reports
  * Excel spreadsheets with the Performance Indicators
- There are also recorded webinars on the ALLStAR Help page at https://www.nellco.org/page/help.

- Under Local Tab
  + Report
  + Report Templates (create report templates to reuse; don’t reinvent the wheel)
  + Published Reports (have an embedded URL to share the reports with others)
Start a New Report

- Click on Reports

Thank you for participating in ALLStAR Benchmarking!

You can create new folder tabs by clicking on the + tab

- Click the “+” and a create a tab window opens
- Enter a folder name
- Click update

Result is a new tab (AKA, folder)
- Click on the new folder’s tab
- Click the Add button under on the Report Tab

- Brings you to a new Report Settings page
- Make sure you are in the right folder.
END START A NEW REPORT
Basic Report Settings

- Open a new report (Add)
- Survey (click the down arrow)
  + select a survey

+ selected ABA
+ page refreshes
+ note the Period

- Period
  + look at the date automatically populated by ABA
  + use it or choose another period by clicking on the down arrow
  + the survey selected influences the time period available for selection and use
- Report Name
  + editable block
  + what you type here shows up in the Reports Tab
  + helps you find a report or template

- Description
  + editable block
  + I use this block to describe the report
    * I usually include the survey name, period and filters which also shows up when reviewing a tab.
- SAVE (use this button all the time)

- Click on “Reports” in portal header

  + note that it has been added to the list under Report Name
  + see how helpful it is to have a Report Name, Survey title, and Description
  + the portal also tells you when it was Updated (SAVED), and when it was last executed
<table>
<thead>
<tr>
<th>Report Name</th>
<th>Report Type</th>
<th>Survey</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a New Report</td>
<td>Table</td>
<td>Demo for WestPac</td>
<td></td>
</tr>
</tbody>
</table>

END BASIC REPORT SETTINGS
In-class Activity #01: After Basic Report Settings

1. Create a tab
2. Add a report (suggest ABA)
3. Select a survey (suggest FY 15-16 because it is populated)
4. Select a period
5. Report name = select something you will remember
6. Provide a description
7. SAVE
8. Check your folder to make sure it is there

YOU WILL USE THIS REPORT A COUPLE OF TIMES
Selecting Indicators

- Reopen the report we have been working on
- Choose Indicators above Group

<table>
<thead>
<tr>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROUP</td>
</tr>
<tr>
<td>-- All groups --</td>
</tr>
</tbody>
</table>

+ the measures available are based upon the Survey chosen
+ you can leave the default at “All groups” which lists every measure
+ OR, you can click the down arrow on “All groups” and select an available group

<table>
<thead>
<tr>
<th>GROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td>-- All groups --</td>
</tr>
</tbody>
</table>

ABA
Section 1 Personnel
Section 2 Hours of Library Operation & Library Services
Section 3 Library Facilities
Section 4 Library Operations
Section 5 Information Technology
  Which departments are responsible for Law School IT? (ABA Q24)
Section 6 Comments
Faculty & Administrators (Current Calendar Year)
Student Enrollment (Current Academic Year)
Curriculum (Prior Academic Year)
  Curriculum (Prior Academic Year) Questions Retired in 15-16
Librarians (ABA Q4)
Key Ratios and Percentages

- Pick an indicator by highlighting it and clicking the “Add” button (right bottom)
You can additional indicators by selecting and clicking Add, or by holding the Control key while you click on the mouse to select the measure.
- **SAVE**

<table>
<thead>
<tr>
<th>Locations</th>
<th>Indicators</th>
<th>Value</th>
<th>% Filter Low &gt;=</th>
<th>&lt;= Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section 2 Hours of Library Operation &amp; Library Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HOURS PER WEEK PROFESSIONAL STAFF ON DUTY - REGULAR SCHEDULE (ABA Q5a) (USNEWS Q6a)</td>
<td>72.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NUMBER OF HOURS PER WEEK LIBRARY IS OPEN - REGULAR SCHEDULE (ABA Q6a) (USNEWS 6a)</td>
<td>104.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**GROUP**

-- All groups --

Sort: A to Z

Hide and Remove Indicators -- the portal has the capability to remove (delete) or to “hide” indicators.
- Open the report with the two indicators
- SAVE as a NEW REPORT
- Change the period to FY 15-16
- Select additional indicators: under Section 1 Personnel, select all four indicators.
- Add
Clicking on the red X removes an indicator from the report.

Another option is to hide an indicator by “unchecking” the box to the left of the title of the indicator.
- RUN the report.
- Note that the column for the indicator unchecked, “Number (in FTEs) of Part-Time Librarians (ABA Q1)” does not appear in the results. Only 5 columns are reported.

### Table: Indicators and Values

<table>
<thead>
<tr>
<th>Library (205)</th>
<th>Hours per week professional staff on duty - regular schedule (ABA Q6a) (USNews Q62)</th>
<th>Number of hours per week library is open - regular schedule (ABA Q9) (USNews 63)</th>
<th>Number (in FTEs) of full-time and part-time library support staff (ABA Q2)</th>
<th>Number (in FTEs) of other full or part-time professional staff (ABA Q6b) (excluding librarians) in the library (ABA Q3)</th>
<th>Number (in FTEs) of full-time librarians including the Director.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>53.00</td>
<td>154.00</td>
<td>4.50</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>80.00</td>
<td>168.00</td>
<td>7.00</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>40.00</td>
<td>72.00</td>
<td>3.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>42.00</td>
<td>122.00</td>
<td>9.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>40.00</td>
<td>71.00</td>
<td>3.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>59.00</td>
<td>124.00</td>
<td>7.00</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>40.00</td>
<td>168.00</td>
<td>2.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Barry University Law School - Italiano Law Library</td>
<td>56.00</td>
<td>116.00</td>
<td>8.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Bentley University Law Library</td>
<td>50.00</td>
<td>106.00</td>
<td>3.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>70.00</td>
<td>116.00</td>
<td>3.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

END SELECTING INDICATORS
In-class Activity #02: After Selecting Indicators

1. Open your saved report
2. Select and add two indicators
3. SAVE
4. RUN
   + how many libraries are in the report?
Report Types: Tables

- Let's look at a Report Settings function
- Report Type

- Defaults to Table
- Click the down arrow for Report Type
  + Table
  + PI (Performance Indicator) Report
  + Trend / PI
  + Graph / PI
  + Summary
  + Summary Graphs
  + Trend
  + Period comparison
  + PI Gap
  + Cross Tab
  + Custom Format

- Make sure Report Type is Table
- RUN (do not SAVE)

END REPORT TYPES: TABLES
Basic Report Example #1

- What I have for the report
  + Survey = ABA
  + Period = FY 15-16
  + Report Name = Library Expenditures
  + Description = ABA, FY 15-16
  + Indicators Selected =
    * Serial Subscription Subtotal;
    * Monographs Subtotal;
    * Electronic Resources Subtotal;
    * Other Expenses (ABA Q22) under Section 4 Library Operations
  + click ADD
- SAVE
- Click the “RUN” button

- Look at the resulting report
  + informs you of the number of libraries (Library) in the report
  + you may select the down arrow in each column to change the sorting order
  + click on the bar chart at the bottom of each column to see a graph
  + you can download the data to an .XLS (Excel) spreadsheet
- Look at the Library location = 218
- But you only see a handful
- Look under the spreadsheet graphic and you will see the default display per page.
  + change from 10 to 30
### Library expenditures

**ABA**  |  **Period:** FY 15-16, (Start 2016-07)  |  **Months:** 12

<table>
<thead>
<tr>
<th>Library (218)</th>
<th>Serial Subscriptions Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>473,142.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>309,946.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>179,115.00</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>291,217.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>46,125.00</td>
</tr>
<tr>
<td>Atlanta’s John Marshall Law School Library</td>
<td>246,726.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>264,115.00</td>
</tr>
<tr>
<td>Barry University Law School - Euliano Law Library</td>
<td>511,108.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>1,213,398.00</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>361,115.00</td>
</tr>
</tbody>
</table>

- Return to the Report Settings by clicking on the “Report Settings” link in the header on the right.
## Library Expenditures

<table>
<thead>
<tr>
<th>Library (218)</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic Resources Subtotal</th>
<th>Other Expenditure (ABA Q22)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>473,142.00</td>
<td>71,747.00</td>
<td>173,299.00</td>
<td>0.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>389,360.00</td>
<td>423,880.00</td>
<td>752,923.00</td>
<td>1,077,271.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>179,115.00</td>
<td>80,885.00</td>
<td>160,343.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>291,217.00</td>
<td>91,757.00</td>
<td>671,027.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>81,520.00</td>
<td>26,012.00</td>
<td>136,837.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>345,735.00</td>
<td>21,012.00</td>
<td>163,622.00</td>
<td>760.99</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>245,112.00</td>
<td>72,067.00</td>
<td>216,028.00</td>
<td>5,717.00</td>
</tr>
<tr>
<td>Barry University Law School - Dalles Law Library</td>
<td>511,380.00</td>
<td>56,395.00</td>
<td>609,965.00</td>
<td>109,570.00</td>
</tr>
<tr>
<td>Baylor University Law School</td>
<td>1,213,108.00</td>
<td>31,695.00</td>
<td>255,108.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Belmore University College of Law Library</td>
<td>561,186.00</td>
<td>37,615.00</td>
<td>548,544.00</td>
<td>30,592.00</td>
</tr>
</tbody>
</table>

---

**END BASIC REPORT EXAMPLE #1**
## Downloading to Excel

- **ALLSTAR** enables users to download reports into Excel, or most any other spreadsheet program such as Google sheets.
- **RUN** the report using Table as the default report type.

### Library expenditures

**ABA** Period: **FY 15-16, (Start 2016-07)**  |  **Library (218)** |  **Serial Subscriptions Subtotal** |  **Monographs Subtotal** |  **Electronic Resources Subtotal** |  **Other Expenses (ABA Q23)**
--- | --- | --- | --- | --- | ---
Albany Law School | 473,142.00 | 71,187.00 | 173,233.00 | 0.00
American University - Pence Law Library | 369,340.00 | 623,820.00 | 752,929.00 | 1,677,271.00
Appalachian School of Law | 179,115.00 | 80,810.00 | 165,312.00 | 0.00
Arizona State University College of Law Library | 201,217.00 | 64,769.00 | 571,322.00 | 0.00
Arizona Summit Law School Library | 86,126.00 | 26,914.00 | 189,837.00 | 0.00
Atlanta’s John Marshall Law School Library | 240,173.00 | 20,102.00 | 182,412.00 | 788.00
Avila Maria School of Law Library | 262,142.00 | 72,867.00 | 215,458.00 | 3,977.00
Barnes University Law School - Intraco Law Library | 311,198.00 | 56,109.00 | 605,969.00 | 163,679.00
Baylor Law Library | 1,213,308.00 | 31,580.00 | 26,308.00 | 0.00
Belmont University College of Law Library | 361,132.00 | 37,615.00 | 348,564.00 | 20,552.00

- **Click on the Spreadsheet icon**

### Library expenditures

**ABA** Period: **FY 15-16, (Start 2016-07)**  |  **Library (218)** |  **Serial Subscriptions Subtotal** |  **Monographs Subtotal** |  **Electronic Resources Subtotal** |  **Other Expenses (ABA Q23)**
--- | --- | --- | --- | --- | ---
Albany Law School | 473,142.00 | 71,187.00 | 173,233.00 | 0.00
American University - Pence Law Library | 369,340.00 | 623,820.00 | 752,929.00 | 1,677,271.00
Appalachian School of Law | 179,115.00 | 80,810.00 | 165,312.00 | 0.00
Arizona State University College of Law Library | 201,217.00 | 64,769.00 | 571,322.00 | 0.00
Arizona Summit Law School Library | 86,126.00 | 26,914.00 | 189,837.00 | 0.00
Atlanta’s John Marshall Law School Library | 240,173.00 | 20,102.00 | 182,412.00 | 788.00
Avila Maria School of Law Library | 262,142.00 | 72,867.00 | 215,458.00 | 3,977.00
Barnes University Law School - Intraco Law Library | 311,198.00 | 56,109.00 | 605,969.00 | 163,679.00
Baylor Law Library | 1,213,308.00 | 31,580.00 | 26,308.00 | 0.00
Belmont University College of Law Library | 361,132.00 | 37,615.00 | 348,564.00 | 20,552.00

- **Depending upon the browser you are using, a dialog box will open**
- Click to “OPEN” or “SAVE” or “SAVE AS” depending upon your needs.
- I chose to open the file, and the spreadsheet loads.
- The spreadsheet's columns and rows are organized just as they appeared on the table when the report was run.
- You may save this file to a local drive to work on later, such as change a column's order or sort the data results in one or more columns.

END DOWNLOADING TO EXCEL
Modify an Existing Report

- ALLStAR enables subscribers to modify an existing report.
  - to improve data retrieval and report outcomes
- Let’s modify an existing report from the WestPac-2018 folder

- RUN
- Review the columns
  - seems out of order, moving left to right.
  - the staff pointed out that there was not a sum for collection expenditures. One would have to add the three library materials rows to create a sum.

- Let’s modify the existing report to improve it.
- Return to Report Settings
### Outline for WestPac Preconference: September 27, 2018

- Add indicators to improve the report
  + **SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)**
  + Other Expenses (ABA Q22)

---

**Library (103)**

<table>
<thead>
<tr>
<th>Library</th>
<th>Total</th>
<th>Monographs Subtotal</th>
<th>Electronic resources Subtotal</th>
<th>Serial Subscriptions Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona State University College of Law Library</td>
<td>797,280</td>
<td>18,140.95</td>
<td>344,161.13</td>
<td>344,161.13</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>822,008</td>
<td>15,910.50</td>
<td>240,066.90</td>
<td>240,066.90</td>
</tr>
<tr>
<td>Boston College Law Library</td>
<td>2,344,026</td>
<td>141,331.99</td>
<td>359,430.90</td>
<td>359,430.90</td>
</tr>
<tr>
<td>Boston University Law Library</td>
<td>2,530,287</td>
<td>193,570.50</td>
<td>1,490,070.90</td>
<td>1,490,070.90</td>
</tr>
<tr>
<td>Brigham Young University - Howard W. Hunter Law Library</td>
<td>1,881,261</td>
<td>13,710.50</td>
<td>528,260.90</td>
<td>528,260.90</td>
</tr>
<tr>
<td>Brooklyn Law School</td>
<td>1,214,902</td>
<td>49,480.50</td>
<td>544,270.90</td>
<td>544,270.90</td>
</tr>
<tr>
<td>Case Western Reserve Law School</td>
<td>1,456,909</td>
<td>16,910.50</td>
<td>547,290.90</td>
<td>547,290.90</td>
</tr>
<tr>
<td>Catholic University of America - Judge Kathryn J. Da Fouk Law Library</td>
<td>895,820</td>
<td>78,711.00</td>
<td>294,020.90</td>
<td>294,020.90</td>
</tr>
<tr>
<td>Chapman University - Fowler School of Law Library</td>
<td>995,356</td>
<td>12,840.50</td>
<td>546,240.90</td>
<td>546,240.90</td>
</tr>
</tbody>
</table>

---

- Save as a New Report
- Rename the report
- RUN
- Review the columns
  + the columns still do not align left to right
Let’s download to Excel to review

- the column sequence is still not what we want; we will need to resort the columns in Excel

Or, use ALLSTAR to resort the columns

Return to Report Settings
To revise the order of columns, revise the Sequence

- Revise the sequence as follows:
  + Monographs Subtotal from 2 to 1
  + Serials Subscriptions Subtotal from 4 to 2
  + Electronic Resources Subtotal leave at 3
  + SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL) from 5 to 4
  + Other Expenses (ABA Q22) from 6 to 5
  + Library Operations Grand Total from 1 to 6

- When you Save, the Sequence is revised

- RUN
- Now, review the columns; looks easier to read left to right
### Modify existing report – six indicators from four indicators

**ABAl Period: FY 16-17, (start 2017-07) Months: 12**

<table>
<thead>
<tr>
<th>Library (103)</th>
<th>Monographs Subtotal</th>
<th>Serial Subscriptions Subtotal</th>
<th>Electronic resources Subtotal</th>
<th>SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)</th>
<th>Other Expenses (ABA OEE)</th>
<th>Library Operations Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona State University College of Law Library</td>
<td>15,345.89</td>
<td>314,625.89</td>
<td>564,051.13</td>
<td>947,546</td>
<td>757,395</td>
<td>1,704,941</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>10,706.00</td>
<td>157,573.00</td>
<td>230,996.66</td>
<td>453,186</td>
<td>735.00</td>
<td>535,921</td>
</tr>
<tr>
<td>Boston College Law Library</td>
<td>611,895.00</td>
<td>955,156.00</td>
<td>899,540.66</td>
<td>2,606,591</td>
<td>1,933,025.00</td>
<td>3,539,526</td>
</tr>
<tr>
<td>Boston University Law Library</td>
<td>53,325.07</td>
<td>689,908.79</td>
<td>1,644,537.28</td>
<td>2,316,962</td>
<td>20,735.84</td>
<td>2,537,707</td>
</tr>
<tr>
<td>Brigham Young University - Howard W. Hunter Law Library</td>
<td>63,744.00</td>
<td>852,108.00</td>
<td>628,083.66</td>
<td>1,422,939</td>
<td>0.00</td>
<td>1,422,939</td>
</tr>
<tr>
<td>Brooklyn Law School</td>
<td>40,148.00</td>
<td>398,807.00</td>
<td>544,070.66</td>
<td>992,225</td>
<td>64,399.69</td>
<td>956,624</td>
</tr>
<tr>
<td>Capital University Law School Library</td>
<td>5,040.00</td>
<td>832,868.66</td>
<td>116,363.66</td>
<td>955,472</td>
<td>0.00</td>
<td>955,472</td>
</tr>
<tr>
<td>Case Western Reserve Law School Library</td>
<td>16,805.00</td>
<td>577,920.00</td>
<td>576,790.66</td>
<td>1,224,510</td>
<td>643,081.00</td>
<td>1,867,591</td>
</tr>
<tr>
<td>Catholic University of America - Judge Kathryn J. DeFerrari Law Library</td>
<td>30,701.00</td>
<td>356,356.00</td>
<td>255,025.66</td>
<td>855,182</td>
<td>20,419.64</td>
<td>875,601</td>
</tr>
<tr>
<td>Chapman University - Fowler School of Law Library</td>
<td>13,345.00</td>
<td>496,428.66</td>
<td>390,348.66</td>
<td>887,213</td>
<td>0.00</td>
<td>887,213</td>
</tr>
</tbody>
</table>

- You can sort the columns ascending to descending
- Click on the Spreadsheet icon and download to Excel
  + the columns are sorted as they were on the Table report
- Modifying an existing report by adding/removing performance indicators, and revising the column sequence, will save you time later when you download the report into a spreadsheet.

END MODIFY AN EXISTING REPORT
After Modifying an Existing Report

In-class Activity #03: Create a New Report
1. Click on an existing report or create a new report
2. Select a survey (suggest ABA)
3. Select a period (FY 15-16 or 16-17 which has fewer participants)
4. Report name = select something you will remember
5. Provide a description
6. SAVE
7. Check your folder to make sure it is there

In-class Activity #04: Add Indicators
1. Select and add three or four indicators
2. SAVE as a new report
3. RUN

In-class Activity #05: Work with the Results
1. Look at the columns of your report
2. Click on a column graph icon to see what it looks like
3. Sort a column (arrow)
4. Download the report to Excel
   + Review the columns
5. Return to Report settings
6. Reorder sequence if they are not suitable for you
7. SAVE
8. RUN
9. Review the columns order
10. Download to Excel
    + note the difference -- you do not have to move columns around
Options Tab

- Return to the Report Settings by clicking on the “Report Settings” link in the header on the right
- Click on the Options tab

+ review all the Options

- Check
  + Average
  + Median
- SAVE
- RUN
- Review the differences
  + At the bottom, you will see the Average and Median for each column

### Library Expenditures with Options


<table>
<thead>
<tr>
<th>Library (218)</th>
<th>Monographs</th>
<th>Serial Subscriptions</th>
<th>Electronic resources</th>
<th>SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)</th>
<th>Other Expenses (ABA G3)</th>
<th>Library Operations Gross Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>71,747.00</td>
<td>470,140.00</td>
<td>17,305.00</td>
<td>723,215.00</td>
<td>0.00</td>
<td>795,025.00</td>
</tr>
<tr>
<td>American University - Fowler Law Library</td>
<td>420,000.00</td>
<td>280,000.00</td>
<td>75,020.00</td>
<td>1,481,080.00</td>
<td>0.00</td>
<td>1,577,291.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>10,000.00</td>
<td>75,000.00</td>
<td>105,000.00</td>
<td>288,000.00</td>
<td>0.00</td>
<td>308,000.00</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>14,000.00</td>
<td>280,000.00</td>
<td>67,350.00</td>
<td>307,350.00</td>
<td>0.00</td>
<td>902,645.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>20,940.00</td>
<td>13,000.00</td>
<td>181,000.00</td>
<td>211,940.00</td>
<td>0.00</td>
<td>213,940.00</td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>25,000.00</td>
<td>245,000.00</td>
<td>183,000.00</td>
<td>553,000.00</td>
<td>0.00</td>
<td>553,000.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>72,000.00</td>
<td>280,000.00</td>
<td>239,000.00</td>
<td>580,000.00</td>
<td>0.00</td>
<td>580,000.00</td>
</tr>
<tr>
<td>Barry University Law School - Eben Law Library</td>
<td>56,000.00</td>
<td>510,000.00</td>
<td>489,000.00</td>
<td>1,039,000.00</td>
<td>0.00</td>
<td>1,039,000.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>30,000.00</td>
<td>320,000.00</td>
<td>1,551,000.00</td>
<td>2,000,000.00</td>
<td>0.00</td>
<td>2,000,000.00</td>
</tr>
<tr>
<td>Boston University College of Law Library</td>
<td>27,000.00</td>
<td>268,000.00</td>
<td>348,000.00</td>
<td>741,000.00</td>
<td>0.00</td>
<td>741,000.00</td>
</tr>
</tbody>
</table>

### Statistics

<table>
<thead>
<tr>
<th></th>
<th>Avg</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg</td>
<td>52,074.00</td>
<td>471,271.00</td>
</tr>
<tr>
<td>Median</td>
<td>62,000.00</td>
<td>392,000.00</td>
</tr>
</tbody>
</table>

- This comes in handy when if you download the file with the six columns of data for the 218 libraries, and then want to have the average and median (or other values from the Option Tab) available for local sorting
- Download to Excel
  + review the added rows in Excel: Average and Median at the bottom of the spreadsheet
+ this data can be sorted

- Do you see a problem?
  + some libraries have zero values.
  - If you do not want to include those with zero values, return to the Options Tab.
    + check to exclude 0 values

- SAVE
- RUN
- Review the table. It shows:
  + that the number of libraries declined from 218 to 205
  + that all of the averages were changed
  + that all of the medians were changed
### Library Expenditures with Options

**ABE Period:** FY 15-16, (Year 2016-07)  **Month:** 12

#### Library (205)

<table>
<thead>
<tr>
<th>Library Name</th>
<th>Monographs Subtotal</th>
<th>Serial Subscriptions Subtotal</th>
<th>Electronic Resources Subtotal</th>
<th>Other Expenses (ABE G22)</th>
<th>Library Operations Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>71,747.00</td>
<td>475,142.00</td>
<td>171,266.00</td>
<td>720,153</td>
<td>763,835</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>403,009.00</td>
<td>309,840.00</td>
<td>762,929.00</td>
<td>1,490,544</td>
<td>1,677,217.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>19,000.00</td>
<td>179,113.00</td>
<td>194,222.00</td>
<td>336,035</td>
<td>359,255</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>51,787.00</td>
<td>291,217.00</td>
<td>571,027.00</td>
<td>877,111</td>
<td>852,447</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>26,914.00</td>
<td>46,825.00</td>
<td>191,457.00</td>
<td>173,536</td>
<td>219,206</td>
</tr>
<tr>
<td>Atlanta’s John Marshall Law School Library</td>
<td>25,122.00</td>
<td>246,725.00</td>
<td>182,632.00</td>
<td>406,463</td>
<td>759.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>72,887.00</td>
<td>268,113.00</td>
<td>216,690.00</td>
<td>552,633</td>
<td>5,717.00</td>
</tr>
<tr>
<td>Barry University Law School - Infante Law Library</td>
<td>51,925.00</td>
<td>511,103.00</td>
<td>485,860.00</td>
<td>1,057,365</td>
<td>103,276.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>31,546.00</td>
<td>1,210,386.00</td>
<td>284,308.00</td>
<td>1,911,312</td>
<td>25,292.00</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>37,615.00</td>
<td>361,158.00</td>
<td>345,564.00</td>
<td>747,297</td>
<td>22,512.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Avg</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg 80,529.84</td>
<td>601,451.44</td>
<td>573,322.92</td>
</tr>
<tr>
<td>Median 45,586.00</td>
<td>435,629.00</td>
<td>355,155.00</td>
</tr>
</tbody>
</table>

- Download to Excel
- Review the bottom of the spreadsheet
  + vastly different

### Morals of the story
- review the data to make you understand the data outcomes
- understand this data before you use it

**END OPTIONS TAB**
In-class Activity #06: After the Options Tab
1. Open your report
2. Go to the Options Tab
3. Add some Options such as Average and Median
4. SAVE
5. RUN a table report and see what it looks like
6. Sort some columns
7. Download to Excel
   + find the options you identified
Basic Report Example #2

ALLStAR has non-library data to help put data into context.

- What I have for the report
  + Survey = ABA
  + Period = FY 15-16
  + Report Name = Law Faculty and Students
  + Description = ABA, FY 15-16
  + Indicators Selected = all indicators under Faculty & Administrators (Current Calendar year
  + click ADD
- SAVE
- Click the “RUN” button

<table>
<thead>
<tr>
<th>GROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td>-- All groups --</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments (ABA Q26)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Faculty &amp; Administrators (Current Calendar Year)</strong></td>
</tr>
<tr>
<td>Full-Time Fall Total Faculty</td>
</tr>
<tr>
<td>Full-Time Spring Total Faculty</td>
</tr>
<tr>
<td>Deans, librarians &amp; others who teach Fall Total</td>
</tr>
<tr>
<td>Deans, librarians &amp; others who teach Spring Total</td>
</tr>
<tr>
<td>Part-Time Fall Total</td>
</tr>
<tr>
<td>Part-Time Spring Total</td>
</tr>
<tr>
<td>Total Fall Faculty</td>
</tr>
<tr>
<td>Total Spring Faculty</td>
</tr>
</tbody>
</table>

- Look at the resulting report
  + fall and spring are interspersed
  + want to group fall with fall and spring with spring
  + could export to a spreadsheet and rearrange the columns
  OR
  + renumber the columns in Report Settings
### Law Faculty and Students

**Survey:** ABA  **Period:** FY 15-16, (start: 2016-07)  **Months:** 12

<table>
<thead>
<tr>
<th>Library (205)</th>
<th>Full-Time Fall Total Faculty</th>
<th>Full-Time Spring Total Faculty</th>
<th>Deans, Librarians &amp; others who teach Fall Total</th>
<th>Deans, Librarians &amp; others who teach Spring Total</th>
<th>Part-Time Fall Total</th>
<th>Part-Time Spring Total</th>
<th>Total Fall Faculty</th>
<th>Total Spring Faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>30</td>
<td>27</td>
<td>5</td>
<td>6</td>
<td>20</td>
<td>28</td>
<td>60</td>
<td>63</td>
</tr>
<tr>
<td>American University - Perdue Law Library</td>
<td>72</td>
<td>49</td>
<td>26</td>
<td>3</td>
<td>47</td>
<td>48</td>
<td>225</td>
<td>246</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>7</td>
<td>8</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>38</td>
<td>51</td>
<td>8</td>
<td>8</td>
<td>52</td>
<td>78</td>
<td>110</td>
<td>137</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>17</td>
<td>17</td>
<td>6</td>
<td>6</td>
<td>12</td>
<td>15</td>
<td>35</td>
<td>50</td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>19</td>
<td>17</td>
<td>7</td>
<td>5</td>
<td>8</td>
<td>19</td>
<td>34</td>
<td>41</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>16</td>
<td>16</td>
<td>6</td>
<td>9</td>
<td>9</td>
<td>20</td>
<td>30</td>
<td>45</td>
</tr>
<tr>
<td>Barry University Law School - Columbus Law Library</td>
<td>29</td>
<td>34</td>
<td>12</td>
<td>12</td>
<td>26</td>
<td>44</td>
<td>77</td>
<td>90</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>28</td>
<td>28</td>
<td>8</td>
<td>6</td>
<td>26</td>
<td>30</td>
<td>83</td>
<td>64</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>13</td>
<td>13</td>
<td>7</td>
<td>7</td>
<td>10</td>
<td>14</td>
<td>30</td>
<td>34</td>
</tr>
</tbody>
</table>

- Report Settings
  - Look at the Sequence order

- Reorder the sequence, grouping fall with fall and spring with spring
  - SAVE
- After being saved, indicators are realigned on Report Settings
- Now, RUN

- The report is better organized for readability.
- Let’s add some Options
  + Total (sum of the values)
  + Average
  + Median
- SAVE
- And, let’s add another indicator
  + Group = Student Enrollment (Current Academic year)
    * Total Number of JD Students (FT and PT combined)
  + Add
- SAVE
### ABA

**Faculty & Administrators (Current Calendar Year)**

- **FULL-TIME FALL TOTAL FACULTY**
  - Value: 90
- **PART-TIME FALL TOTAL**
  - Value: 103
- **DEANS, LIBRARYANRS & OTHERS WHO TEACH FALL TOTAL**
  - Value: 47
- **TOTAL FALL FACULTY**
  - Value: 200
- **FULL-TIME SPRING TOTAL FACULTY**
  - Value: 70
- **PART-TIME SPRING TOTAL**
  - Value: 101
- **DEANS, LIBRARYANRS & OTHERS WHO TEACH SPRING TOTAL**
  - Value: 47
- **TOTAL SPRING FACULTY**
  - Value: 168

### GROUP

**Student Enrollment (Current Academic Year)**

- **Total Number of JD Students (F1 and PT Combined)**
- **Percent Total Students**
- **Total Number of JD Degrees Awarded in reporting year**
- **Total Full Time Non JD Enrollment**
- **Total Part Time Non JD Enrollment**

---

- **RUN**
Law Faculty and Students


<table>
<thead>
<tr>
<th>Library</th>
<th>Full-Time Fall Total</th>
<th>Full-Time Spring Total</th>
<th>Part-Time Fall Total</th>
<th>Part-Time Spring Total</th>
<th>Deans, librarians &amp; others who teach Fall Total</th>
<th>Deans, librarians &amp; others who teach Spring Total</th>
<th>Total Fall Faculty</th>
<th>Total Spring Faculty</th>
<th>Total Total (FT and PT Combined)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>30</td>
<td>30</td>
<td>28</td>
<td>28</td>
<td>5</td>
<td>6</td>
<td>63</td>
<td>63</td>
<td>460</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>22</td>
<td>22</td>
<td>22</td>
<td>22</td>
<td>3</td>
<td>3</td>
<td>46</td>
<td>46</td>
<td>1,288</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>7</td>
<td>7</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>10</td>
<td>10</td>
<td>110</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>50</td>
<td>50</td>
<td>52</td>
<td>52</td>
<td>8</td>
<td>8</td>
<td>63</td>
<td>63</td>
<td>623</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>17</td>
<td>17</td>
<td>16</td>
<td>16</td>
<td>6</td>
<td>6</td>
<td>33</td>
<td>33</td>
<td>567</td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>34</td>
<td>34</td>
<td>41</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>16</td>
<td>16</td>
<td>9</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>34</td>
<td>34</td>
<td>268</td>
</tr>
<tr>
<td>Barry University Law School - Bingham Law Library</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>34</td>
<td>34</td>
<td>268</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>20</td>
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<td>20</td>
<td>20</td>
<td>5</td>
<td>5</td>
<td>37</td>
<td>37</td>
<td>306</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>7</td>
<td>7</td>
<td>17</td>
<td>17</td>
<td>230</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>7,752</td>
<td>7,752</td>
<td>2,210</td>
<td>2,210</td>
<td>17,303</td>
<td>17,303</td>
<td>19,355</td>
<td>19,355</td>
<td>183,962</td>
</tr>
<tr>
<td><strong>Avg</strong></td>
<td>38</td>
<td>38</td>
<td>11</td>
<td>11</td>
<td>87</td>
<td>87</td>
<td>111</td>
<td>111</td>
<td>505</td>
</tr>
<tr>
<td><strong>Median</strong></td>
<td>32</td>
<td>32</td>
<td>31</td>
<td>31</td>
<td>71</td>
<td>71</td>
<td>80</td>
<td>80</td>
<td>457</td>
</tr>
</tbody>
</table>

END BASIC REPORT EXAMPLE #2
Filters

- Return to the Report Settings by clicking on the “Report Settings” link in the header on the right
- Filters are used to create ranges to narrow results
  - one of the most powerful limiters available in ALLStAR
  - two filters:
    * Locations (use to choose libraries) (we will return to Locations later)
    * Value (greater than, less than, etc.)

- Use Value to reduce the number of results
  - let’s use Serial Subscriptions Subtotal to limit the results
  - set the filter low value to $800,000.
  - set the filter high value to $2,000,000.
  - This “logic” states -- “show me the results when the expenditures reported for Serial Subscriptions are more than or equal to $800,000 and less than or equal to $2,000,000”
- Report type = table
- RUN (do not SAVE)
- We have reduced our results to 28.

**Library Expenditures**

<table>
<thead>
<tr>
<th>Library (28)</th>
<th>Serial Subscriptions Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baylor University Law Library</td>
<td>1,213,398.00</td>
</tr>
<tr>
<td>Boston University Law Library</td>
<td>994,616.00</td>
</tr>
<tr>
<td>Brigham Young University - Howard W. Hunter Law Library</td>
<td>859,377.00</td>
</tr>
<tr>
<td>Duke University - Goodson Law Library</td>
<td>802,485.00</td>
</tr>
<tr>
<td>Fordham University School of Law Library</td>
<td>1,065,861.00</td>
</tr>
<tr>
<td>Georgetown University - Edward Bennett Williams Law Library</td>
<td>821,326.00</td>
</tr>
<tr>
<td>Harvard University School of Law Library</td>
<td>1,906,347.00</td>
</tr>
<tr>
<td>Indiana University Bloomington School of Law Library</td>
<td>1,110,733.00</td>
</tr>
<tr>
<td>Marquette University Law School Library</td>
<td>847,697.00</td>
</tr>
<tr>
<td>New York University School of Law Library</td>
<td>1,145,620.00</td>
</tr>
</tbody>
</table>

**End Note**

- In addition to numeric values, you may also apply a percentage filter.
  + A percentage filter identifies libraries with the value filters within the percentage range of the numeric value entered into the filter.
- Percentage filters require a numeric **AND** the percentage sign
  + Let’s use Serial Subscriptions Subtotal to limit the results
  + In the “%Filter Low >+” box, type in 5 and then the percentage sign - %
+ This “logic” states — “show me the results when the expenditures reported for Serial Subscriptions Subtotal is within the range of 5% above and 5% below my library’s value
- Report type = table

- RUN (do not SAVE)

Library expenditures

<table>
<thead>
<tr>
<th>Library (B)</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic resources Subtotal</th>
<th>Other Expenses (ABA Q2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boston University Law Library</td>
<td>$94,315.00</td>
<td>$101,264.00</td>
<td>$515,448.00</td>
<td>$11,844.00</td>
</tr>
<tr>
<td>Fordham University School of Law Library</td>
<td>$1,002,861.00</td>
<td>$936,051.00</td>
<td>$494,621.00</td>
<td>$39,157.00</td>
</tr>
<tr>
<td>UCLA - Hugh &amp; Hazel Darling Law Library</td>
<td>$1,005,004.00</td>
<td>$485,371.00</td>
<td>$551,407.00</td>
<td>$225,164.00</td>
</tr>
<tr>
<td>University of Chicago - O’Angelo Law Library</td>
<td>$387,335.00</td>
<td>$409,223.00</td>
<td>$203,770.00</td>
<td>$294,950.00</td>
</tr>
<tr>
<td>University of Louisville Law Library</td>
<td>$1,004,800.00</td>
<td>$26,421.00</td>
<td>$225,372.00</td>
<td></td>
</tr>
<tr>
<td>University of North Carolina - Katherine R. Everett Law Library</td>
<td>$965,627.00</td>
<td>$69,967.00</td>
<td>$360,000.00</td>
<td>$23,502.00</td>
</tr>
<tr>
<td>Yale University - Lillian Goldman Law Library</td>
<td>$1,015,468.00</td>
<td>$1,156,468.00</td>
<td>$555,000.00</td>
<td>$116,762.00</td>
</tr>
<tr>
<td>Yeshiva Univ Benjamin N Cardozo School of Law</td>
<td>$95,919.00</td>
<td>$102,757.00</td>
<td>$263,617.00</td>
<td>$751.00</td>
</tr>
</tbody>
</table>

End Note

<table>
<thead>
<tr>
<th>Filters</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serial Subscriptions Subtotal</td>
<td>5%</td>
</tr>
</tbody>
</table>

- Hint: changing the filters can yield very different results

END FILTERS
In-class Activity #07: After Filters
1. Open your report
2. RUN
   a. how many libraries?
3. Return to Report settings
4. Filter one indicator
   + write down the argument -- what are you filtering?
5. SAVE
6. RUN
7. Now, how many libraries are reported?
   + did your filters work as you thought they would?
Two Survey Collections

- The ALLStAR master collection can be used with any of the indicators available
- AND, the ALLStAR portal enables the creation of reports combining indicators from two surveys, such as ABA and ARL.

Please note that in late September 2018, many of the data collections had little reported data. The capability of combining two survey collections will improve as more data collections are populated by the law school libraries.

- Click on the Survey down arrow in Report Settings, and choose ARL as the 2nd survey

- Note that the period will align to that of the first survey; FY 15-16
It is recommended that you edit the Report Name block and the Description
Click SAVE as NEW REPORT

- Choose the indicators you want to add from the Survey
  + select Total library expenditures (automatic sum of 7 + 8 + 9) (ARL Q6) in the Expenditures Subgroup
  + click Add
- Note that the ARL indicator has been added
- SAVE
- RUN
- Notice the 5th column appears on the table

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Value</th>
<th>&lt;= Filter Low</th>
<th>&lt;= Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL LIBRARY EXPENDITURES (AUTOMATIC SUM OF 7 + 8 + 9) (ARL Q6)</td>
<td>8,600,111.00</td>
<td></td>
<td></td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

Section 4 Library Operations

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Value</th>
<th>&lt;= Filter Low</th>
<th>&lt;= Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>SERIAL SUBSCRIPTIONS SUBTOTAL</td>
<td>1,615,400.00</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>MONOGRAPHS SUBTOTAL</td>
<td>1,199,469.00</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>ELECTRONIC RESOURCES SUBTOTAL</td>
<td>858,800.00</td>
<td></td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>OTHER EXPENSES (ABA Q22)</td>
<td>111,752.00</td>
<td></td>
<td></td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
## Two Surveys - Library expenditures

<table>
<thead>
<tr>
<th>Library (215)</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic resources Subtotal</th>
<th>Other Expenses (ASA Q22)</th>
<th>Total library expenditures (automatic exam of T = S + B) (ARL 36)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>475,142.00</td>
<td>71,742.00</td>
<td>175,266.00</td>
<td>0.00</td>
<td>3,054.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>369,546.00</td>
<td>420,565.00</td>
<td>752,005.00</td>
<td>1,077,271.00</td>
<td>2,550.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>179,115.00</td>
<td>19,888.00</td>
<td>160,242.00</td>
<td>0.00</td>
<td>1,734,200.00</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>261,272.00</td>
<td>14,747.00</td>
<td>571,027.00</td>
<td>0.00</td>
<td>1,734,200.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>46,195.00</td>
<td>30,516.00</td>
<td>109,857.00</td>
<td>0.00</td>
<td>750.00</td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>265,728.00</td>
<td>26,122.00</td>
<td>162,632.00</td>
<td>750.00</td>
<td>5,712.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>365,513.00</td>
<td>22,902.00</td>
<td>216,000.00</td>
<td>5,712.00</td>
<td>1,734,200.00</td>
</tr>
<tr>
<td>Barry University Law School - Columbo Law Library</td>
<td>311,100.00</td>
<td>30,120.00</td>
<td>409,380.00</td>
<td>1,513,931.00</td>
<td>3,895.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>2,212,200.00</td>
<td>21,045.00</td>
<td>295,205.00</td>
<td>0.00</td>
<td>2,550.00</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>381,154.00</td>
<td>37,019.00</td>
<td>548,564.00</td>
<td>30,002.00</td>
<td>1,734,200.00</td>
</tr>
</tbody>
</table>

END TWO SURVEY COLLECTIONS
In-class Activity #08: After Two Survey Collections

1. Open your report
2. Report settings
3. Pick a second survey
   + look at the period
   + change Report Name
   + change Description
4. SAVE as a NEW REPORT
5. Select a new indicator
6. SAVE
7. RUN
8. Review the resulting report
Presenting Data

- Viewing Data within the Portal
- Open Library Expenditures ABA and ARL report
  + SAVE as a NEW REPORT
  + change report name to Presenting Data - Library expenditures
  + change description to ABA, FY 15-16
  + SAVE
  + Then, delete the ARL indicator
  + SAVE
- RUN the report

### Presenting Data - Library expenditures

<table>
<thead>
<tr>
<th>Library (218)</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic Resources Subtotal</th>
<th>Other Expenses (ABA Q22)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>475,143.60</td>
<td>74,747.60</td>
<td>115,265.60</td>
<td>0.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>309,845.60</td>
<td>433,849.60</td>
<td>702,929.60</td>
<td>1,877,274.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>175,130.00</td>
<td>30,800.00</td>
<td>108,242.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona State University College of Law</td>
<td>254,247.00</td>
<td>61,757.00</td>
<td>371,237.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>45,929.00</td>
<td>20,984.00</td>
<td>110,457.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Attila's John Marshall Law School Library</td>
<td>285,720.00</td>
<td>25,122.00</td>
<td>312,833.00</td>
<td>750.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>254,163.00</td>
<td>72,807.00</td>
<td>316,000.00</td>
<td>5,717.00</td>
</tr>
<tr>
<td>Barry University Law School - Estevan Law Library</td>
<td>691,150.00</td>
<td>56,120.00</td>
<td>406,968.00</td>
<td>169,070.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>1,213,229.00</td>
<td>21,865.00</td>
<td>206,200.00</td>
<td>0.00</td>
</tr>
<tr>
<td>DePaul University College of Law Library</td>
<td>201,134.00</td>
<td>37,600.00</td>
<td>248,944.00</td>
<td>20,032.00</td>
</tr>
</tbody>
</table>

- Sort column by clicking on the arrows in the headers.

### Presenting Data - Library expenditures

<table>
<thead>
<tr>
<th>Library (218)</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic Resources Subtotal</th>
<th>Other Expenses (ABA Q22)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>475,143.60</td>
<td>74,747.60</td>
<td>115,265.60</td>
<td>0.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>309,845.60</td>
<td>433,849.60</td>
<td>702,929.60</td>
<td>1,877,274.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>175,130.00</td>
<td>30,800.00</td>
<td>108,242.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona State University College of Law</td>
<td>254,247.00</td>
<td>61,757.00</td>
<td>371,237.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>45,929.00</td>
<td>20,984.00</td>
<td>110,457.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Attila's John Marshall Law School Library</td>
<td>285,720.00</td>
<td>25,122.00</td>
<td>312,833.00</td>
<td>750.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>254,163.00</td>
<td>72,807.00</td>
<td>316,000.00</td>
<td>5,717.00</td>
</tr>
<tr>
<td>Barry University Law School - Estevan Law Library</td>
<td>691,150.00</td>
<td>56,120.00</td>
<td>406,968.00</td>
<td>169,070.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>1,213,229.00</td>
<td>21,865.00</td>
<td>206,200.00</td>
<td>0.00</td>
</tr>
<tr>
<td>DePaul University College of Law Library</td>
<td>201,134.00</td>
<td>37,600.00</td>
<td>248,944.00</td>
<td>20,032.00</td>
</tr>
</tbody>
</table>

- Sort multiple columns by holding down the shift key and clicking another column header.

### Presenting Data - Library expenditures

<table>
<thead>
<tr>
<th>Library (218)</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic Resources Subtotal</th>
<th>Other Expenses (ABA Q22)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>475,143.60</td>
<td>74,747.60</td>
<td>115,265.60</td>
<td>0.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>309,845.60</td>
<td>433,849.60</td>
<td>702,929.60</td>
<td>1,877,274.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>175,130.00</td>
<td>30,800.00</td>
<td>108,242.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona State University College of Law</td>
<td>254,247.00</td>
<td>61,757.00</td>
<td>371,237.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>45,929.00</td>
<td>20,984.00</td>
<td>110,457.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Attila's John Marshall Law School Library</td>
<td>285,720.00</td>
<td>25,122.00</td>
<td>312,833.00</td>
<td>750.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>254,163.00</td>
<td>72,807.00</td>
<td>316,000.00</td>
<td>5,717.00</td>
</tr>
<tr>
<td>Barry University Law School - Estevan Law Library</td>
<td>691,150.00</td>
<td>56,120.00</td>
<td>406,968.00</td>
<td>169,070.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>1,213,229.00</td>
<td>21,865.00</td>
<td>206,200.00</td>
<td>0.00</td>
</tr>
<tr>
<td>DePaul University College of Law Library</td>
<td>201,134.00</td>
<td>37,600.00</td>
<td>248,944.00</td>
<td>20,032.00</td>
</tr>
</tbody>
</table>

- Sort multiple columns by holding down the shift key and clicking another column header.
- Click the arrow on Monographs Subtotal and sort low to high

- Why the zero values? Remember, this is because we did not exclude 0 values from the Options tab. If you have values greater than 0 in monographs when sorted from low to high, then you have 0 values checked in Options.

- Click the arrow on Monographs Subtotal again and sort high to low

- To view a graph for the column, click on the graph button at the bottom of the Electronic resources subtotal column
- The image is unreadable. This is a problem when you have this number of results.

- However, you can download the data to a spreadsheet.
- Click on the spreadsheet icon.
This spreadsheet can be customized to needs by reformatting and sorting.

END PRESENTING DATA
In-class Activity #09: After Presenting Data

1. Open your report
2. Change the Report Name
3. Change the Description
4. SAVE as a NEW REPORT
5. RUN
6. Sort on a column
7. View a column graph
Advanced Report Types

Visual Presentations
- There is a multiplicity of report types available through ALLStAR: the presentation you make is based upon what you want to show
- The Options Tab also comes into play with most of the report types.
- Return to Report Settings
- Change Report Type by clicking on the arrow

- We have already talked about Table reports -- this section reviews the other report types
What are the most helpful report types?

- **Table**
  + this is the default report type

- **PI Report**
After selecting PI report, note the blue arrows to the left of the library’s performance indicators’ values.
Advanced Report Types - Library expenditures

Survey:   ABA   Period   FY 16-17

<table>
<thead>
<tr>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Temple University Beasley School of Law</td>
<td>1. Capital University Law School Library</td>
</tr>
<tr>
<td>4. Oklahoma City University – Law Library</td>
<td>4. Valparaiso University – Law Library</td>
</tr>
<tr>
<td>5. Villanova Law Library</td>
<td>5. University of Memphis School of Law Library</td>
</tr>
<tr>
<td>7. University of St Thomas (MN) School of Law</td>
<td>7. Cleveland Marshall College of Law Library</td>
</tr>
</tbody>
</table>

+ may be easier to read since the indicators are side by side.
+ the gray areas represent the 26th to 74th percentiles.
<table>
<thead>
<tr>
<th>Institution</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Syracuse University Law Library</td>
<td>72,285.00</td>
</tr>
<tr>
<td>Seattle University School of Law Library</td>
<td>74,613.00</td>
</tr>
<tr>
<td>Stetson University - Dolly &amp; Homer Hand Law Library</td>
<td>75,468.00</td>
</tr>
<tr>
<td>University of Notre Dame - Kresge Law Library</td>
<td>77,195.38</td>
</tr>
<tr>
<td>University of Utah-S.J. Quinney College of Law - James E. Faust Library</td>
<td>79,173.08</td>
</tr>
<tr>
<td>Thomas Jefferson School of Law - Library</td>
<td>80,711.00</td>
</tr>
<tr>
<td>Boston University Law Library</td>
<td>83,325.57</td>
</tr>
<tr>
<td>Southwestern Law School</td>
<td>88,273.00</td>
</tr>
<tr>
<td>Louisiana State University - Paul M. Hebert Law Library</td>
<td>95,698.00</td>
</tr>
<tr>
<td>Georgia State University Law Library</td>
<td>97,273.00</td>
</tr>
<tr>
<td>New England School of Law</td>
<td>100,998.00</td>
</tr>
<tr>
<td>Vanderbilt University Law School Library</td>
<td>103,266.00</td>
</tr>
<tr>
<td>University of Colorado Law School - William A. Wise Law Library</td>
<td>104,167.00</td>
</tr>
<tr>
<td>Southern Methodist University Law Library</td>
<td>112,984.00</td>
</tr>
<tr>
<td>Texas A&amp;M University Dee J Kelly Law Library</td>
<td>115,264.00</td>
</tr>
<tr>
<td>University of California Irvine - Law Library</td>
<td>125,337.00</td>
</tr>
<tr>
<td>Northwestern University Law School</td>
<td>128,772.00</td>
</tr>
</tbody>
</table>

* The PI Report is improved by selecting Options from the Options Tab, such as:
  * Total
  * Average
  * Minimum
  * Maximum

+ The options are found at the bottom of each chart
- **Trend/PI Report**
  + provides data for selected years
  + because it measures a period of time, you need to select the start year at the Period block

+ the report displays data for the years of the start period, and the period. This could include multiple years.
+ Selecting the graph icon

+ displays a chart in which
  * blue line is your library.
  * Box charts: center line is the median. The top and bottom of the box are approximately the upper and lower quartiles, and the end points is the range.
- **Trend Report**
  + looks like Trend/PI except that it can graph each location.

<table>
<thead>
<tr>
<th>Serial Subscriptions Subtotal</th>
<th>FY 14-15</th>
<th>FY 15-16</th>
<th>FY 16-17</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trend</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Section 4 Library Operations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Albany Law School</td>
<td>473,999.00</td>
<td>473,142.00</td>
<td></td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>382,567.00</td>
<td>309,948.00</td>
<td></td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>280,655.00</td>
<td>175,115.00</td>
<td></td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>330,873.00</td>
<td>261,217.00</td>
<td>314,621.69</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>96,079.00</td>
<td>45,129.00</td>
<td></td>
</tr>
<tr>
<td>Atlanta’s John Marshall Law School Library</td>
<td>284,712.00</td>
<td>246,726.00</td>
<td></td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>285,004.00</td>
<td>264,413.00</td>
<td>107,572.00</td>
</tr>
<tr>
<td>Barry University Law School - Euliano Law Library</td>
<td>461,873.00</td>
<td>511,108.00</td>
<td></td>
</tr>
</tbody>
</table>

+ click on the graph icon for a library, and a bar chart is generated
selective Options (Percentage Change, Total, Responses (N), Average, Minimum and Maximum) improve the presentation.
### Period Comparison Report

<table>
<thead>
<tr>
<th>Serial Subscriptions Subtotal</th>
<th>FY 14-15</th>
<th>Diff(%)</th>
<th>FY 15-16</th>
<th>Diff(%)</th>
<th>FY 16-17</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Albany Law School</strong></td>
<td>478,969.00</td>
<td>-1.22%</td>
<td>473,142.00</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td><strong>American University - Pence Law Library</strong></td>
<td>352,587.00</td>
<td>-18.00%</td>
<td>300,946.00</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td><strong>Appalachian School of Law</strong></td>
<td>296,855.00</td>
<td>-37.52%</td>
<td>178,115.00</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td><strong>Arizona State University College of Law Library</strong></td>
<td>330,879.00</td>
<td>-11.99%</td>
<td>291,217.00</td>
<td>0.04%</td>
<td></td>
</tr>
<tr>
<td><strong>Arizona Summit Law School Library</strong></td>
<td>95,079.00</td>
<td>-51.48%</td>
<td>46,125.00</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td><strong>Atlanta’s John Marshall Law School Library</strong></td>
<td>265,712.00</td>
<td>-13.34%</td>
<td>246,728.00</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td><strong>Ave Maria School of Law Library</strong></td>
<td>286,000.00</td>
<td>-7.33%</td>
<td>261,113.00</td>
<td>-25.10%</td>
<td></td>
</tr>
</tbody>
</table>

| Yale University Lillian Goldman Law Library | 1,113,978.00 | -8.65%  | 1,015,400.00 | -3.85% | 576,261.44 |
| Yeshiva Univ Benjamin N Cardozo School of Law | 1,247,900.00 | -20.35% | 954,603.00 | 0%     |
| York University Osgoode Hall Law School Library | 0% | 0% | 0% |

| Total | 113,550,364.00 | -5.62% | 102,737,213.00 | -55.23% | 45,996,037.66 |
| N | 206 | -0.49% | 205 | -50.24% | 102 |
| Avg | 551,215.36 | -9.08% | 501,157.14 | -10.01% | 450,970.06 |
| Max | 2,590,324.00 | 6.94% | 2,776,472.00 | -10.05% | 2,467,465.00 |
| Min | 2,241.00 | -96.18% | 108.00 | 3046.3% | 3,398.00 |

- **Outline for WestPac Preconference: September 27, 2018**
+ unlike the Trend reports, this report only provides data from two years.
+ the indicators are now vertical columns rather than horizontal.
+ shows percentage change, so no need to add that from the Options Tab.

### Advanced Report Types - Library expenditures

**ABA**

<table>
<thead>
<tr>
<th>Locations - 218</th>
<th>Serial Subscriptions Subtotal (Section 4 Library Operations)</th>
<th>Monographs Subtotal (Section 4 Library Operations)</th>
<th>Electronic resources Subtotal (Section 4 Library Operations)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Period</strong>: FY 16-17</td>
<td><strong>FY 16-17</strong></td>
<td><strong>FY 14-15</strong></td>
</tr>
<tr>
<td>Columbia University Arthur W. Diamond Law Library</td>
<td>2,437,465.00</td>
<td>2,427,132.00</td>
<td>378,929.00</td>
</tr>
<tr>
<td>University of Michigan Law School Library</td>
<td>1,194,753.00</td>
<td>1,229,573.00</td>
<td>347,352.00</td>
</tr>
<tr>
<td>University of Chicago – D Angelo Law Library</td>
<td>1,069,070.00</td>
<td>1,062,300.00</td>
<td>430,760.00</td>
</tr>
<tr>
<td>Fordham University School of Law Library</td>
<td>988,012.00</td>
<td>1,018,453.00</td>
<td>161,649.00</td>
</tr>
</tbody>
</table>

+ selecting any of the graphs available yield different data visualizations. Experimenting is encouraged.

- **PI Gap Report**
  + this report uses a paired ordering, so you must be aware of your Sequence on the Report Settings screen.
+ RUN

Advanced Report Types - Library expenditures

Survey: ABA  Period: Start 2017-07  Month: 12

<table>
<thead>
<tr>
<th>Locations - 210</th>
<th>Serial Subscriptions Subtotal</th>
<th>Monographs Subtotal</th>
<th>Electronic resources Subtotal</th>
<th>SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)</th>
<th>Library Operations Expenses Total (ABA Q1 - ABA Q2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columbia University Arthur W. Diamond Law Library</td>
<td>2,437,456.00</td>
<td>56.2%</td>
<td>978,326.00</td>
<td>631,824.00</td>
<td>-25.3%</td>
</tr>
<tr>
<td>University of Michigan Law School Library</td>
<td>1,194,753.00</td>
<td>243.9%</td>
<td>347,382.00</td>
<td>641,938.00</td>
<td>-12.4%</td>
</tr>
<tr>
<td>University of Chicago – D Angelo Law Library</td>
<td>1,828,670.00</td>
<td>49.0%</td>
<td>436,760.00</td>
<td>853,038.00</td>
<td>-20.4%</td>
</tr>
<tr>
<td>Fordham University School of Law Library</td>
<td>650,012.00</td>
<td>643.9%</td>
<td>191,689.00</td>
<td>469,268.00</td>
<td>-12.4%</td>
</tr>
<tr>
<td>Yale University Lillian Goldman Law Library</td>
<td>872,291.44</td>
<td>11.5%</td>
<td>1,013,643.78</td>
<td>1,504,704.00</td>
<td>-47.6%</td>
</tr>
<tr>
<td>University of Colorado Law School – William A. Wise Law Library</td>
<td>521,031.00</td>
<td>784.8%</td>
<td>194,167.00</td>
<td>538,158.00</td>
<td>-25.6%</td>
</tr>
<tr>
<td>Syracuse University Law Library</td>
<td>869,316.00</td>
<td>1136.3%</td>
<td>72,256.00</td>
<td>747,562.00</td>
<td>-76.2%</td>
</tr>
</tbody>
</table>

+ to affect the report’s results, you can delete indicators to remove them from the report
OR
+ you can hide indicators so that they will not appear on the PI Gap report, but are not removed from Report Settings

+ Re-RUN and view the difference.
+ expenditures may not be as useful for PI Gap reports, but think what you could do with staff and staffing levels.

- **Summary Graphs**
  + are useful for visual presentations since they visualize the minimum, maximum and average on a chart.
the small red vertical lines denote the range for the value; your library’s value is the taller vertical line. The red vertical line in the red box is the average.

+ adding Options -- Average, Maximum, Minimum, and Median -- provides the chart with needed visual context.
What are the least helpful report types?

- **Summary Reports**
  + Summary reports do not give you much detail.
  + RUN
To get any useful data, you need to select from the Options Tab.

- **Graph/PI Report**
  + is great for comparing two indicators using an overlay. Need to identify an indicator for the overlay and place it in the overlay filter.

  + determine which performance indicator you want to pair, and then click in the Overlay box.
  * a new window opens
* select an indicator

+ the selected overlay appears in the window; then, click on “Update Overlay” to save the indicator
+ you are returned to the Report Settings Screen; note that the Overlay box I populated

+ RUN the report.
+ the overlay selected, in this example “Number of hours per week the library is open - regular schedule” appears as a line on the bar chart.
+ the Graph/PI report is good for an analysis but not so much for quickly identifying data.

- Cross Tab Report
  + the ALLStAR portal has a very good Cross Tab report.
  + however, Cross tabs are useful ONLY IF you understand their purpose and applicability.
  + I will not demonstrate Cross Tabs in this workshop but encourage you to experiment with this report.

- Custom Formats
  + allows for interactivity with documents
  + a library can create a custom report that will update a Word or Excel each time the report is updated (such as annually) and the custom report is run.
  + again, I will not demonstrate Custom Formats in this workshop but encourage you to experiment with this report.

END ADVANCED REPORT TYPES
After Advanced Report Types

In-class Activity #10: Use a Different Report Type
1. Create or modify an existing report.
2. RUN a table report
3. Return to Report Settings
4. Add one or more Options
5. SAVE
6. RUN as a different report type
7. Review
8. Are the results usable? If not, return to Report Settings and change the Report Type

In-class Activity #11: Case Study for Report Type
"Today a claim was made that the budget cuts suffered by my library in the past year(s) is typical and, that the cuts are actually less than others.

I'm hoping to discover the percentage change year each year for the past three years:
- Per FTE
- By Collection budget
- By Personnel budget
- By Law Library budget"

1. What indicators could you use?
2. What report type would you use?

Dugan’s Approach:
1. Create a new report
2. ABA
3. Period = FY16-17
4. Select indicators
   - collections (SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)
   - Library Operations Expenses Total (ABA14 - ABA Q22)
   - Library Operations Grand Total
5. What’s missing?
   - personnel expenses.
   - how would I get that?
   + collected for ARL, but not ABA
6. If we cannot get personnel expenses, then let’s look at the number of FTEs personnel
   - Number (in FTEs) of part-time librarians (ABA Q1)
   - Number (in FTEs) of full-time and part-time library support staff (excluding hourly students and other temporary support staff) (ABA Q2)
   - Number (of FTES) of full time librarians including the director
7. Expenditures per FTE student
- Add indicator for Total number of JD students (FT and PT combined);
  + could be problematic since this is actually headcount rather than FTE
- We will need to calculate a derived ratio in Excel as we reviewed earlier
- Add a key ratio:
  + Collections $ per student

8. SAVE and RUN to see what happened.
9. Then, reorder the sequence.
10. Add Options:
   - Total
   - Responses (N)
   - Average
11. SAVE
### ABA

#### Section 1 Personnel

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
<th>% Filter Low</th>
<th>% Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number (in FTEs) of full-time and part-time library support staff (ABA Q4)</td>
<td>16.00</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Number (in FTEs) of part-time librarians (ABA Q1)</td>
<td>0.80</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Number (in FTEs) of full-time librarians including the director.</td>
<td>21.00</td>
<td></td>
<td></td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

#### Section 4 Library Operations

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
<th>% Filter Low</th>
<th>% Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sum of library resources (serials subtotal + monographs subtotal + electronic resources subtotal)</td>
<td>3,102,082</td>
<td></td>
<td></td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Library operations expenses total (ABA - ABA Q22)</td>
<td>685,984</td>
<td></td>
<td></td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Library operations grand total</td>
<td>3,781,067</td>
<td></td>
<td></td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

#### Student Enrollment (Current Academic Year)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
<th>% Filter Low</th>
<th>% Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of JD students (FT and PT combined)</td>
<td>453</td>
<td></td>
<td></td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

#### Key Ratios and Percentages

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
<th>% Filter Low</th>
<th>% Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections $ per student</td>
<td>4,522</td>
<td></td>
<td></td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>

12. **RUN and Review**
2. What report type would you use?

**Dugan’s Approach:**

- **Table:** YES, it would suffice; download to Excel.
- **PI report:** no, lacks period comparison requested.
- **Trend/PI:** YES, especially with percentage change added (Options).
- **Graph PI:** no, lacks period comparison; paired indicators.
- **Summary:** no, lacks location details.
- **Summary Graphs:** no, lacks period comparisons.
- **Trend:** OK, but only looks at average for your institution and therefore not useful for comparison.
- **Period comparison:** YES
- **PI Gap:** no, looks at paired indicators.
Derived Ratios

A developing strength of ALLStAR will be the availability of derived ratios (also known as Key Metrics) through the portal. A derived ratio is the result of one indicator divided into another. Frequently-used ratios involve expenditures, staff, and students. The ratios are often used for benchmarking studies and to identify best practices.

Counting Opinions is adding Key Metrics (derived ratios) to the ABA data collection.

Using the Portal’s Derived Ratios

- What I have for the report
  + Survey = ABA
  + Period = FY 15-16
  + Report Name = Derived Ratios Example #1
  + Description = ABA, FY 15-16

- Let’s look at the new group for Key Ratios
  + under Group, click the down arrow, highlight Key Ratios and Percentages, and select

<table>
<thead>
<tr>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROUP</td>
</tr>
<tr>
<td>-- All groups --</td>
</tr>
<tr>
<td>-- All groups --</td>
</tr>
<tr>
<td>ABA</td>
</tr>
<tr>
<td>Section 1 Personnel</td>
</tr>
<tr>
<td>Section 2 Hours of Library Operation &amp; Library Services</td>
</tr>
<tr>
<td>Section 3 Library Facilities</td>
</tr>
<tr>
<td>Section 4 Library Operations</td>
</tr>
<tr>
<td>Section 5 Information Technology</td>
</tr>
<tr>
<td>Which departments are responsible for Law School IT? (ABA Q24)</td>
</tr>
<tr>
<td>Section 6 Comments</td>
</tr>
<tr>
<td>Faculty &amp; Administrators (Current Calendar Year)</td>
</tr>
<tr>
<td>Student Enrollment (Current Academic Year)</td>
</tr>
<tr>
<td>Curriculum (Prior Academic Year)</td>
</tr>
<tr>
<td>Curriculum (Prior Academic Year) Questions Retired in 15-16</td>
</tr>
<tr>
<td>Librarians (ABA Q4)</td>
</tr>
<tr>
<td><strong>Key Ratios and Percentages</strong></td>
</tr>
<tr>
<td>+ then, select Collections $ Per Student, and click Add</td>
</tr>
</tbody>
</table>
What indicators are in this key ratio? Click on the indicator to see the definition.

+ a window open and the Derivation is defined.
- SAVE, and RUN the report
  + the output comes from 218 libraries, and the right column shows the Collection $ per student in whole dollars

- Add other indicators to put this derived ratio into context
  + let’s add the collections costs reported
  + under Group, click the down arrow, and select Section 4 Library Operations
  + select SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)
Using Excel to Create Derived Ratios

- Click Add and then SAVE

- **RUN**
  - Note the two columns:

### Derived Ratios - demo for WestPac

<table>
<thead>
<tr>
<th>Library (219)</th>
<th>Collections $ per student</th>
<th>SUM OF LIBRARY RESOURCES (SERIALS SUBTOTAL + MONOGRAPHS SUBTOTAL + ELECTRONIC RESOURCES SUBTOTAL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>1,740</td>
<td>726,190</td>
</tr>
<tr>
<td>American University - Phoenix Law Library</td>
<td>1,017</td>
<td>1,448,624</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>1,150</td>
<td>300,265</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>2,150</td>
<td>817,041</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>289</td>
<td>173,536</td>
</tr>
<tr>
<td>Atlanta's John Marshall Law School Library</td>
<td>277</td>
<td>454,483</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>2,086</td>
<td>500,650</td>
</tr>
<tr>
<td>Barry University Law School - Colman Law Library</td>
<td>1,387</td>
<td>1,851,200</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>5,016</td>
<td>1,531,372</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>5,116</td>
<td>747,097</td>
</tr>
</tbody>
</table>

**N = 219**

**Avg = 1,793**

503,227

Sort multiple columns by holding down the shift key and clicking another column header
+ if a derived ratio is not part of the ALLStAR portal, you can use Excel to create one or more
+ I have already selected some performance indicators
+ RUN the report, and download the table into Excel
+ Use this spreadsheet to create three derived ratios:
  * collection per head count
  * expenses per head count
  * total expend per head count

END DERIVED RATIOS
Publish Reports

- You can also publish or share a report
  + You have created a report you want to share with others
- Click on “Publish Report” on the Reporting Settings Page
  + this create a “QR” and a URL for embedding the data into a report for one or more stakeholder audiences

- These shared reports are found under the “Published Reports” Tab under the Local Tab

- Copy the URL to embed in a document or as a link on a web page.
Click on the QR code.

END PUBLISH REPORTS
Best Practices

- Use best practices to discover which libraries are doing what yours would like to be doing -- which libraries are meeting or exceeding your objective?
- You want to improve a process or function, OR you have an objective from your strategic plan you would like to reach.
- best practices can take a couple of approaches related to libraries: look at a larger target group -- maybe all of the libraries in ALLStAR -- or just your identified institutional peers.
- best practices is dependent upon developing a logic statement and the application of filters.

Best Practices Example

- We are going to do a best practice study: Number of hours of reference service provided each week on a regular academic schedule.
  - survey = ABA
  - period = FY 16-17 (has the most libraries for this example)
  - report name = Best Practices: Library Reference Hours
  - description = ABA FY 16-17; demo for WestPac

- Logic to use: who provides more reference hours than my library with similar staffing levels and hours open?
  - I have selected the four FTEs I have in ABA (ABA Q1, ABA Q2, ABA Q3 and Number (In FTEs) of Full-Time Librarians Including the Director.
  - I selected hours open per week on the regular schedule (ABA Q5) and number of hours reference of reference services provide per week during the academic session (ABA Q6). These are also required by US News.
  - I have checked Response (N) and Average under Options to give me some context.
  - REMINDER: your library’s reported data is found under Values
- RUN to see the results as a table report
+ there are 119 libraries in this report
- Apply Filters
  + use high filters for each of the staff indicators. These are the personnel resources I have and that is not going to change.
  + for reference hours, use 43 as the low filter because I am not looking for any library offering fewer hours.

+ SAVE and RUN
+ report results show 63 libraries
revise the logic: I am not looking or any libraries open fewer hours than we are. So, put in low of 104 for hours open.
+ report results show 27 libraries

- Anything I can do to further decrease this?
  + Move hours open per week from low to high. Those become maximum hours open rather than minimum hours open.

<table>
<thead>
<tr>
<th>Locations</th>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Value</td>
</tr>
<tr>
<td>LOCATIONS</td>
<td></td>
</tr>
<tr>
<td>ABA</td>
<td></td>
</tr>
<tr>
<td>Section 1 Personnel</td>
<td></td>
</tr>
<tr>
<td>NUMBER OF HOURS PER WEEK LIBRARY IS OPEN - REGULAR SCHEDULE (ABA Q2) (USNEWS 6g)</td>
<td>104.00</td>
</tr>
<tr>
<td>NUMBER OF HOURS OF REFERENCE SERVICE PROVIDED PER WEEK - REGULAR SCHEDULE (ABA Q6) (USNEWS Q6g)</td>
<td>43.00</td>
</tr>
</tbody>
</table>

+ SAVE and RUN

- report results show 40 libraries. I’m regressing. Now what?
  + use a range. For hours open, a minimum of what we are at 104 and a maximum of a shift of 8 hours, so 112 as high.

<table>
<thead>
<tr>
<th>Locations</th>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Value</td>
</tr>
<tr>
<td>LOCATIONS</td>
<td></td>
</tr>
<tr>
<td>ABA</td>
<td></td>
</tr>
<tr>
<td>Section 1 Personnel</td>
<td></td>
</tr>
<tr>
<td>NUMBER OF HOURS PER WEEK LIBRARY IS OPEN - REGULAR SCHEDULE (ABA Q2) (USNEWS 6g)</td>
<td>104.00</td>
</tr>
<tr>
<td>NUMBER OF HOURS OF REFERENCE SERVICE PROVIDED PER WEEK - REGULAR SCHEDULE (ABA Q6) (USNEWS Q6g)</td>
<td>43.00</td>
</tr>
</tbody>
</table>

+ SAVE and RUN
- report results show 17 libraries.
  + change hours open range from 104 to 108.

<table>
<thead>
<tr>
<th>LOCATIONS</th>
<th>Indicators</th>
<th>Value</th>
<th>% Filter Low &gt;=</th>
<th>&lt;= Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ABA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Section 1 Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NUMBER (IN FTES) OF PART-TIME LIBRARIANS (ABA Q4)</td>
<td>0.00</td>
<td></td>
<td></td>
<td>8</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>NUMBER (IN FTES) OF FULL-TIME AND PART-TIME LIBRARY SUPPORT STAFF</td>
<td>15.00</td>
<td></td>
<td></td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>(EXCLUDING HOURLY STUDENTS AND OTHER TEMPORARY SUPPORT STAFF) (ABA Q5)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NUMBER (IN FTES) OF OTHER FULL OR PART-TIME PROFESSIONAL STAFF (ABA Q6)</td>
<td>1.00</td>
<td></td>
<td></td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>NUMBER (IN FTES) OF FULL-TIME LIBRARIANS INCLUDING THE DIRECTOR</td>
<td>21.00</td>
<td></td>
<td></td>
<td>21</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Section 2 Hours of Library Operation &amp; Library Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NUMBER OF HOURS PER WEEK LIBRARY IS OPEN - REGULAR SCHEDULE (ABA Q5)</td>
<td>104.00</td>
<td></td>
<td></td>
<td>104</td>
<td>108</td>
</tr>
<tr>
<td></td>
<td>NUMBER OF HOURS OF REFERENCE SERVICE PROVIDED PER WEEK - REGULAR SCHEDULE</td>
<td>43.00</td>
<td></td>
<td></td>
<td>43</td>
<td>6</td>
</tr>
</tbody>
</table>

+ SAVE and RUN

- report results show 14 libraries
  + this is an adequate number on which to follow up and ask these libraries how they are providing more reference hours with similar staffing levels.
### End Note

**Filters**

<table>
<thead>
<tr>
<th>Filters</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number (in FTEs) of full-time and part-time library support staff (excluding hourly students and other temporary support staff) (ABA Q2)</td>
<td>15</td>
</tr>
<tr>
<td>Number (in FTEs) of full-time librarians (ABA Q1)</td>
<td>1</td>
</tr>
<tr>
<td>Number (in FTEs) of full-time librarians including the Director</td>
<td>21</td>
</tr>
<tr>
<td>Number of hours per week library is open - regular schedule (ABA Q5) (USNews 63)</td>
<td>104 160</td>
</tr>
<tr>
<td>Number of hours of reference service provided per week - regular schedule (ABA Q6) (USNews Q63)</td>
<td>43</td>
</tr>
</tbody>
</table>

### END BEST PRACTICES
After Best Practices

In-class Activity #12: Conceptualize Your Own Best Practices Search, and Implement
1. Open a new report
   + choose a survey collection (recommend ABA, 15-16)
2. Change the Report Name
3. Change the Description
4. SAVE
5. Select one or more indicators to do a best practices study
6. SAVE
7. RUN to make sure there is data
8. Return to Report Settings
9. Based upon your library’s values, set low or high filters
10. write down your logic for this specific search
11. SAVE
12. RUN
13. Review the report
    + did you identify libraries with best practices you may want to contact for more information?

Suggestions for Best Practices Indicators
1. staff and expenditures
2. staff and hours open
3. students and seats available
4. students and hours open
5. expenditures on specifics of the collection (serials-monographs-electronic resources)
6. number of faculty and students, and library expenditures
Benchmarking

Benchmarks and Benchmarking Studies
- Libraries often use benchmarking, such as performance benchmarking, to determine how the library’s operations compares to:
  + similar libraries, such as libraries in peer or aspirant institutions.
  + other law libraries which are not peers or aspirants
- It’s a comparative technique and not intended to be construed as a competitive activity among libraries.
- Something to think about -- how are peers chosen? By the institution? By the law school?
  + if selected by the institution, is the law school involved or included in the choices?

Setting up a Benchmarking Study
- What indicators do you want to compare?
- With whom do you want to compare these indicators?
- Select the appropriate survey
- Ensure the reporting period is correct
- Ensure that the indicators have data available

Benchmark Example

- Survey = ABA
- Period = FY 16-17 ABA
- Report name = Benchmark Example
- Description = ABA, FY 16-17; staff
- Select
  + Number (in FTEs) of part-time librarians (ABA Q1);
  + Number (in FTEs) of full-time and part-time library support staff (excluding hourly students ….) (ABA Q2);
  + Number (in FTEs) of other full or part-time professional staff (excluding librarians) in the library (ABA Q3)
  + Number (in FTEs) of full-time Librarians including Director
- Add
- SAVE
- RUN to make sure the data is there (have data from 113 locations)

**Benchmarking Example #1 - demo for WestPac**

<table>
<thead>
<tr>
<th>Library (113)</th>
<th>Number (in FTEs) of part-time librarians (ABA Q1)</th>
<th>Number (in FTEs) of full-time and part-time library support staff (excluding hourly students and other temporary support staff) (ABA Q2)</th>
<th>Number (in FTEs) of other full or part-time professional staff (excluding librarians) in the library (ABA Q3)</th>
<th>Number (in FTEs) of full-time Librarians including the Director</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona State University College of Law Library</td>
<td>0.00</td>
<td>6.00</td>
<td>1.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>0.00</td>
<td>5.50</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Boston College Law Library</td>
<td>0.00</td>
<td>6.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Boston University Law Library</td>
<td>0.00</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Brigham Young University - Howard W. Hunter Law Library</td>
<td>0.00</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Brooklyn Law School</td>
<td>0.00</td>
<td>10.00</td>
<td>0.00</td>
<td>10.00</td>
</tr>
<tr>
<td>Capital University Law School Library</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Case Western Reserve Law School Library</td>
<td>0.00</td>
<td>9.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Catholic University of America - Judge Kathryn J. Dufour Law Library</td>
<td>0.00</td>
<td>4.00</td>
<td>0.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Chapman University - Fowler School of Law Library</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

- We will benchmark on peer institutions
- Return to Report Settings
- SAVE as New Report
  + change Report Name = Benchmarking Example - Location Filter
- Set up institutional peers by using the Location filter
- Click Locations

- Up pops a new window with a list of the law schools
- Yale is my base library; find Yale in the list.
- And, then I am looking at Ivy League law schools and a couple of others as an example for peers:
  + Columbia University
  + Cornell University
  + Harvard University
  + University of Pennsylvania
  + University of Virginia
  + Stanford
  + and Yale
- Then, Apply
- Look at the Filters box on the Report Settings; you now see the law schools listed

- To make sure that I have the right peers, click on Locations again
- Click on View Selection
- The law schools I checkmark appear

- I don’t want to have to do this every time I want to benchmark with this group
- At the bottom of the Locations windows, you can type in a Filter Name
- Type one in and hit SAVE.
That filter is now available when you need it. Just look for the named filter whenever you use the Locations filter.
- SAVE
- Then, RUN and see what happens
- There are the four indicators for just the schools filtered

Benchmarking Example #1 - demo for WestPac - Location Filter Revised 2018-09-03

ABA Period: FY 16-17, (Start 2017-07) Months: 12

<table>
<thead>
<tr>
<th>Library [5]</th>
<th>Number (in FTEs) of part-time librarians (ABA Q1)</th>
<th>Number (in FTEs) of full-time and part-time library support staff (excluding hourly students and other temporary support staff) (ABA Q2)</th>
<th>Number (in FTEs) of other full or part-time professional staff (excluding librarians) in the library (ABA Q3)</th>
<th>Number (in FTEs) of full-time librarians including the Director,</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columbia University Arthur W. Diamond Law Library</td>
<td>0.00</td>
<td>13.00</td>
<td>5.00</td>
<td>15.00</td>
</tr>
<tr>
<td>Cornell University Law School Library</td>
<td>0.00</td>
<td>9.25</td>
<td>-</td>
<td>7.80</td>
</tr>
<tr>
<td>Stanford University Robert Crown Law Library</td>
<td>0.00</td>
<td>12.75</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>University of Pennsylvania Biddle Law Library</td>
<td>0.00</td>
<td>14.00</td>
<td>1.00</td>
<td>14.00</td>
</tr>
<tr>
<td>Yale University Lillian Goldman Law Library</td>
<td>0.00</td>
<td>15.00</td>
<td>1.00</td>
<td>21.00</td>
</tr>
</tbody>
</table>

End Note

Locations:
- Yale University Lillian Goldman Law Library
- Columbia University Arthur W. Diamond Law Library
- Cornell University Law School Library
- Harvard University School of Law Library
- Stanford University Robert Crown Law Library
- University of Pennsylvania Biddle Law Library
- University of Virginia - Arthur J. Morris Law Library

Benchmark Case Study #1

“My dean wants to know the number of librarian FTEs in the top 10 law schools, and then compare raw figures, by faculty size and by student size.”

- Open a new report
  - ABA 15-16 because of the larger number of respondents
- number of librarians
  - FTEs of part-times (ABA Q1)
  - FTEs of full-time librarians including the director (unnumbered ABA Q)
- total fall faculty (including spring may create an overlap)
- total number of JD students (FT and PT combined) - remember, this is head count not FTEs
- Click on locations
- Check off the top ten law schools (US News 2018)
  + Columbia University
  + Harvard University
  + New York University
  + Stanford University
  + University of California - Berkeley
  + University of Chicago
  + University of Michigan
  + University of Pennsylvania
  + University of Virginia
  + Yale University
- **Locations**

- University of Alabama - Bounds Law Library
- University of Alberta J.A. Weir Law Library
- University of Arizona - Daniel F. Cracchiolo Law Library
- University of Arkansas at Little Rock Law Library
- University of Arkansas Fayetteville Young Law Library
- University of Baltimore Law Library
- University of British Columbia Law Library
- University of California Davis Mabie Law Library
- University of California Hastings College of Law
- University of California Irvine - Law Library
- University of California-Berkeley School of Law Library
- University of Chicago - D Angelo Law Library
- University of Cincinnati College of Law Library
- University of Colorado Law School - William A. Wise Law Library
- University of Connecticut Law Library
- University of Dayton Zimmerman Law Library
- University of Denver - Westminster Law Library

- **Apply**
- **Click on Locations**
  - view selections to verify libraries have been added

- **Include my location**
- **View All**

**Locations**

- **ALLSTAR**
  - Columbia University Arthur W. Diamond Law Library
  - Harvard University School of Law Library
  - New York University School of Law Library
  - Stanford University Robert Crown Law Library
  - University of California-Berkeley School of Law Library
  - University of Chicago - D Angelo Law Library
  - University of Michigan Law School Library
  - University of Pennsylvania Biddle Law Library
  - University of Virginia - Arthur J. Morris Law Library
  - Yale University Lillian Goldman Law Library

- **SAVE as a filter**
  - File Name = US News Top 10
- Apply
- SAVE, and then RUN
- Only Yale completed the number if FTEs of full-time librarians
Now what? The Dean asked for the FTEs for all of the top ten schools.

- Add a second survey; this functionality is one of most useful features of ALLStAR
  + ARL (all are ARLs except Stanford)
  + add professional staff (FTE) (ARL Q13a)
### ABA

#### Section 1 Personnel

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
<th>% Filter Low</th>
<th>% Filter High</th>
<th>Sequence</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number (in FTES) of Part-time Librarians (ABA Q)</td>
<td>0.80</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Number (in FTES) of Full-time Librarians including the Director</td>
<td>20.00</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Faculty &amp; Administrators (Current Calendar Year)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Fall Faculty</td>
<td>200</td>
<td></td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Total Number of JD Students (FT and PT Combined)</td>
<td>014</td>
<td></td>
<td></td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

#### Personnel

- **Professional staff (FTE) (ARL Q13a)**
- Support staff (FTE) (ARL Q13b)
- Student assistants (FTE) (ARL Q13c)

#### Instruction

- Presentations to groups (ARL Q14v/ACRL 70 Line C)
- Is library presentations figure based on sampling? (ARL Q14a)
- Number of total participants in group presentations (ARL Q15 / ACRL 71 line C)
- Are participant figures based on sampling? (ARL Q15a)

---

SAVE
- **RUN**
- **Review the table report.**

### Table Report

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
<th>Filter Low</th>
<th>Filter High</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROFESSIONAL STAFF (FTE) (ARL Q1A)</td>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NUMBER (IN FTE) OF PART-TIME LIBRARIANS (ABA Q1)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NUMBER (IN FTE) OF FULL-TIME LIBRARIANS INCLUDING THE DIRECTOR.</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL FALL FACULTY</td>
<td>200</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL NUMBER OF JD STUDENTS (FT AND PT COMBINED)</td>
<td>614</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What kind of report type would you use?
+ Table
+ PI Report
+ I’d probably go into Excel and create a report.

**Benchmark Case Study #2**

“My Dean wants to know how our library compares to our peers in terms of their total physical space. There may be an effort to re-purpose our student-centered library space.”

- Open a new report
- Select US News, FY 15-16
- find the square footage, library (ABA Q8; USNews 59)
  + Add
- On Options Tab, select Responses (N) and Average
- SAVE

---

**End Note**

**Locations:**
- Columbia University Arthur W. Diamond Law Library
- Harvard University School of Law Library
- New York University School of Law Library
- Stanford University Robert Crown Law Library
- University of California-Berkeley School of Law Library
- University of Chicago - D'Angelo Law Library
- University of Michigan Law School Library
- University of Pennsylvania Biddle Law Library
- University of Virginia - Arthur J. Morris Law Library
- Yale University Lillian Goldman Law Library
- RUN

Benchmarking Case Study #2 – physical space

<table>
<thead>
<tr>
<th>Library (204)</th>
<th>Square footage - Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany Law School</td>
<td>42,481.00</td>
</tr>
<tr>
<td>American University - Pence Law Library</td>
<td>63,000.00</td>
</tr>
<tr>
<td>Appalachian School of Law</td>
<td>24,700.00</td>
</tr>
<tr>
<td>Arizona State University College of Law Library</td>
<td>23,299.00</td>
</tr>
<tr>
<td>Arizona Summit Law School Library</td>
<td>38,656.00</td>
</tr>
<tr>
<td>Atlanta’s John Marshall Law School Library</td>
<td>39,002.00</td>
</tr>
<tr>
<td>Ave Maria School of Law Library</td>
<td>13,100.00</td>
</tr>
<tr>
<td>Barry University Law School - Eudglas Law Library</td>
<td>30,000.00</td>
</tr>
<tr>
<td>Baylor University Law Library</td>
<td>49,310.00</td>
</tr>
<tr>
<td>Belmont University College of Law Library</td>
<td>20,000.00</td>
</tr>
</tbody>
</table>

- Return to Report Settings
- Click on locations
- Select peers or apply the filter from a previous search [selected Yale peers]
+ Apply
- SAVE

- RUN
- Review the table
Benchmarking Case Study #2 - physical space

USMWR

Period: FY 15-16, (Start 2016-07) Months: 12

<table>
<thead>
<tr>
<th>Library (?)</th>
<th>Square footage - library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columbia University Arthur W. Diamond Law Library</td>
<td>75,152.00</td>
</tr>
<tr>
<td>Cornell University Law School Library</td>
<td>62,352.00</td>
</tr>
<tr>
<td>Harvard University School of Law Library</td>
<td>141,219.00</td>
</tr>
<tr>
<td>Stanford University Robert Crown Law Library</td>
<td>46,931.00</td>
</tr>
<tr>
<td>University of Pennsylvania Biddle Law Library</td>
<td>66,602.00</td>
</tr>
<tr>
<td>University of Virginia - Arthur J. Morris Law Library</td>
<td>78,631.00</td>
</tr>
<tr>
<td>Yale University Lillian Goldman Law Library</td>
<td>74,750.00</td>
</tr>
</tbody>
</table>

End Note

Locations:
- Columbia University Arthur W. Diamond Law Library
- Cornell University Law School Library
- Harvard University School of Law Library
- Stanford University Robert Crown Law Library
- University of Pennsylvania Biddle Law Library
- University of Virginia - Arthur J. Morris Law Library
- Yale University Lillian Goldman Law Library

END BENCHMARKING
In-class Activity #13: Benchmarking

1. Open a new report
2. Change the Report Name
3. Change the Description
4. SAVE
5. Select two indicators to do a benchmark study
   + if they have a relationship, fine, but not essential
6. SAVE
7. RUN and review (make sure there is data)
8. Return to Report settings
9. Click on LOCATIONS
10. find four or five of your institutional peers and check mark them
    + make sure your library is check marked
    + Apply
    + the portal will return you to Report Settings
11. Click LOCATIONS
12. View Selection to see if all the libraries you selected are there
13. Type in a Filter Name and SAVE
14. Close and return to Reports Settings
15. SAVE
16. Click LOCATIONS
17. Select Filter name
18. View Selection to ensure the filter is applied
19. Close
20. SAVE
21. RUN and review results
ALT-Peers

- Institutions have identified peer institutions, usually required by their regional accrediting organization.
- In turn, law schools have also identified a set of peer law schools. This list may differ from the institution. This is the cohort you would use for benchmarking.
- However, some of you may want to identify other peers for benchmarking.
  + maybe as a result of competing for the same students because of LSAT scores or geopolitical area; maybe compete on reputation.
- Teresa Miguel-Sterns from Yale’s Law School refers to this activity as “ALT-Peers.”

How do you identify ALT-Peers?
- Use the various data collections in ALLStAR to add indicators, run reports, and then filter the indicators (location, numeric, text, and percentage) to identify libraries you want to benchmark.
- Use the IPEDS summary tables to identify institutions with characteristics you seek.
  + then, once narrowed down, determine if there is a law school.
  + this is a macro approach because IPEDS applies characteristics that are not included in ALLStAR.

Using ALLStAR

- Set up new report
- Go with ALLStAR Master Collection first
  + set period to 15-16
- Then, click on All Groups to see the vastness of the indicators available in this master collection
- Select:
  + Compensation Total % of Total Budget
  + Other operating expenditures (ARL Q9) % of total budget
  + Total library materials (Automatic sum of 7a + 7b + 7c) (ARL Q7) % of total budget
- Next, select ABA survey
  + ensure that the period remains at FY 15-16
  + click on All Groups and review the indicators
  + select:
    * 75th Percentile LSAT
    * 50th Percentile LSAT
    * 25th Percentile LSAT
    * # not included in LSAT calculations
    * and, Collections $ per student (Key Ratios and Percentages)
      - set a low filter of 5000
- Next, select US News survey collection
  + ensure that the period remains at FY 15 - 16
  + select:
* Number of hours per week library is open - regular schedule (ABA Q5) (USNEWS 63)
* Hours per week professional staff on duty - regular schedule (ABA Q5A) (USNEWS Q63)
- On the Options Tab, check Responses (N)
- SAVE
Note that none of the three libraries are institutional peers for Yale. The $5,000 low filter on Collections $ per student is the dependent variable in this ALT-Peer example.

Using IPEDS

- https://nces.ed.gov/ipeds/use-the-data
- Then, click on Summary Tables
- Use final release data
  + then continue
- Ensure “Select Institutions” is highlighted
- Hover over “By Groups”

- Click on “EZ Group”
- Click on the links under “Special characteristics” and select criteria
  + Bureau of Economic Analysis (BEA) Regions
    * New England and Mid East
  + notice how the box with “______ institution(s) Clear Search” changes
+ under Sector
  * Public, 4-year or above
  * Private not for Profit, 4-year or above
+ under Highest degree offered
  * Doctorate - professional practice
+ under Degree of urbanization (Locale)
  * City: Large
  * City: Midsize
- The number of institutions found is update -- the results for this example are 20.
Summary Tables

1. Select Institutions      2. Select Templates      3. Output

My Comparison Institution - None Selected

How would you like to select institutions to include in your data file/report?
- By Names or UnitIDs
- By Groups
- By Variables
- By Uploading a File

Data Collection: 2017 [change year]

- Click on Search to see the resulting list
- Not all on this list will have law schools, but this is one methodology for identifying ALT-Peers.

END ALT-PEERS
What I have learned … Hints

Some Hints
- You cannot break it!
- Explore the tool to get comfortable
- Start with one or two measures
- Experiment
- Remember to SAVE your changes
- It’s like anything else -- to get better at it, you must practice/do it.

END HINTS
Questions?

- Epiphanies?