

## Downloading Statistics from the Circulation Manager Software

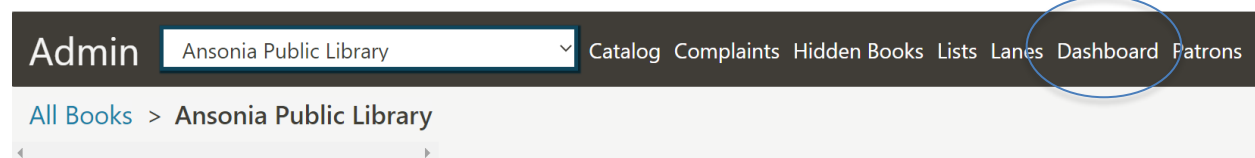
### Dashboard Link:

You can access your library dashboard at the following link:

<https://lci.lyrasistechnology.org/admin>

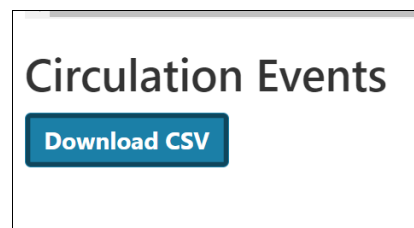
If you do not have a login, ask your library director to create an account for you or email LYRASIS technical support at [simplye@lyrasis.zendesk.com](mailto:simplye@lyrasis.zendesk.com).

To download all "events" captured by the circulation manager, login to the "Dashboard," scroll to the bottom of the page, and click "Download CSV."



### **Step #1**

Download the CSV file – Click on the “Download CSV” button, pictured below, to start the download process.



### **Step #2**

Set the date range - In the pop-up window, select your time frame and leave the Event Type as "All Events." Once completed, click “Download.”

Download CSV

**Event Type**

**Start Date**

**End Date**

**Download**

**Close**

### Step #3

Reviewing events - The circulation manager tracks every single event, or transaction, from both your library and the vendors that provide the digital files to SimplyE. You will be able to view activity from vendors (even vendor apps, like Libby), but we assume your primary focus will be on your local library activity in SimplyE.



Below are the definitions of the events originating in SimplyE related to your specific library patrons:

1. circulation\_manager\_check\_out – A patron checked out a book through SimplyE
2. circulation\_manager\_check\_in – A patron returned a book through SimplyE
3. circulation\_manager\_hold\_place – A patron placed a hold through SimplyE
4. circulation\_manager\_hold\_release – A patron cancelled a hold through SimplyE
5. circulation\_manager\_fulfill – A patron downloaded a book through SimplyE. The patron might download the same book multiple times if using multiple devices or logging in and out, and each of these downloads will be tracked as a separate event. This event includes downloads of public domain books.
6. circulation\_manager\_new\_patron – A patron logged in to SimplyE for the first time.
7. open\_book – A patron opened a book in the SimplyE app

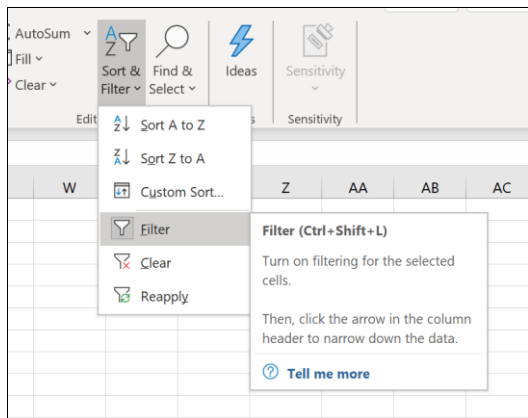
Other events you will see on the spreadsheet that are related to vendors:

1. distributor\_check\_out – A patron checked out a book through any app
2. distributor\_check\_in – A patron returned a book through any app
3. distributor\_hold\_place – A patron placed a hold through any app
4. distributor\_hold\_release – A patron released a hold through any app
5. distributor\_license\_add – The library added an additional license for a book
6. distributor\_license\_remove – The library removed a license for a book
7. distributor\_availability\_notify – A patron had a hold on a specific book, and it became available for checkout
8. distributor\_title\_add – The library added a new title to the collection
9. distributor\_title\_remove – The library removed a title from the collection

#### Step #4

Sorting the spreadsheet – To better parse the data, it is often easier to sort or filter the CSV spreadsheet. One option is to sort column b (event) from A-Z to view the circulation manager events related to your library all together.

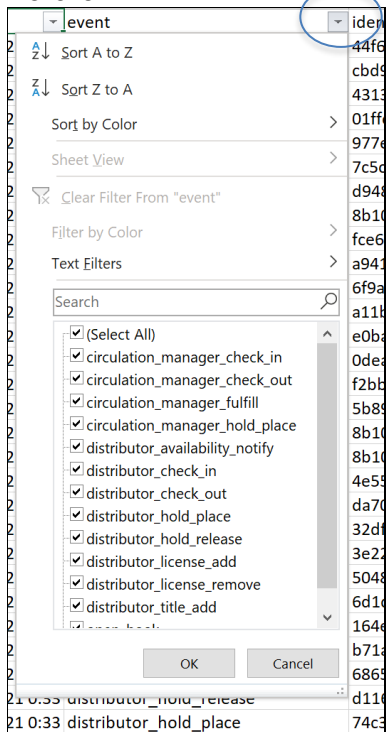
A second option is to create a filter in Excel to remove the “distributor” events. This will clean up the spreadsheet, so you only view the relevant entries. To create a filter, open the CSV file, click “Sort & Filter,” then “Filter.”



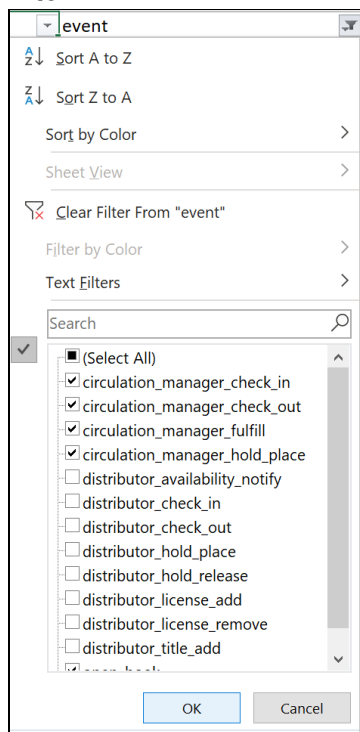
## Step #5

Once you have enabled filters, then go to the top of the event column (column b) and click the down arrow to remove the unwanted options. Check all the unwanted “distributor” events and then click “OK.” This will give you an updated spreadsheet reflecting only local library data in SimplyE.

Before:



After:





## Sample CSV file spreadsheet with the column b (event) sorted A-Z:

time	event	identifier	identifier_type	title	author	fiction	audience	publisher	imprint	language	target_age	genres	location
3/3/2021 13:37	circulation_manager_check_in	a7db6f28-a0b9-4	Overdrive ID	I Crawl Through It	King, A. S.	fiction	Young Ad	Hachette	I Little, Brov	eng	17-Dec		
3/3/2021 13:41	circulation_manager_check_in	https://www.fee URI		Ruth Bader Ginsburg	Winter, Jonah	nonfiction	Children	Abrams Books for Yc	eng		9-Sep	Biography & Memoir,Political Science,History	
3/3/2021 13:44	circulation_manager_check_in	2fa60646-a0cf-4a	Overdrive ID	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 14:08	circulation_manager_check_in	23544840	Axis 360 ID	Dissenter on the Ben	Ortiz, Victoria	nonfiction	Young Ad	Houghton Clarion	Bo eng		14-Dec	Biography & Memoir,Life Strategies,Political Science	
3/3/2021 14:39	circulation_manager_check_in	2fa60646-a0cf-4a	Overdrive ID	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 13:35	circulation_manager_check_out	2fa60646-a0cf-4a	Overdrive ID	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 13:36	circulation_manager_check_out	a7db6f28-a0b9-4	Overdrive ID	I Crawl Through It	King, A. S.	fiction	Young Ad	Hachette	I Little, Brov	eng	17-Dec		
3/3/2021 13:37	circulation_manager_check_out	https://www.fee URI		Ruth Bader Ginsburg	Winter, Jonah	nonfiction	Children	Abrams Books for Yc	eng		9-Sep	Biography & Memoir,Political Science,History	
3/3/2021 13:40	circulation_manager_check_out	23544840	Axis 360 ID	Dissenter on the Ben	Ortiz, Victoria	nonfiction	Young Ad	Houghton Clarion	Bo eng		14-Dec	Biography & Memoir,Life Strategies,Political Science	
3/3/2021 13:45	circulation_manager_check_out	2fa60646-a0cf-4a	Overdrive ID	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 20:01	circulation_manager_check_out	a426304a-a03f-4	Overdrive ID	Whiskey in a Teacup	Witherspoon, Ree	nonfiction	Adult	Atria Books	eng		18-	Biography & Memoir,Performing Arts	
3/3/2021 20:59	circulation_manager_check_out	7d707e98-533d-4	Overdrive ID	Sharp Objects	Flynn, Gillian	fiction	Young Ad	Crown	Broadway eng		18-18	Suspense/Thriller,Mystery	
3/3/2021 23:15	circulation_manager_check_out	0c76d88c-df39-4	Overdrive ID	Dear Evan Hansen	Emmich, Val ; Lev	fiction	Young Ad	Little, Brov	Poppy eng		17-Dec		
3/3/2021 13:35	circulation_manager_fulfill	2fa60646-a0cf-4a	Overdrive ID	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
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3/1/2021 17:07	circulation_manager_hold_place	10971012	Axis 360 ID	Daring Greatly	Brown, Bren A	nonfiction	Adult	Penguin U	Avery Pub eng		18-	Psychology,Self-Help	
3/1/2021 17:07	circulation_manager_hold_place	ba97df5a-9c47-4	Overdrive ID	Daring Greatly	Brown, Bren A	nonfiction	Adult	Penguin P	Avery eng		18-	Psychology,Self-Help	

## Sample CSV file spreadsheet using filter:

time	event	identifier	identifier_type	title	author	fiction	audience	publisher	imprint	language	target_age	genres	location
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3/3/2021 13:35	circulation_manager_fulfill	2fa60646-Overdrive	Overdrive	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 13:35	open_book	2fa60646-Overdrive	Overdrive	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 13:36	open_book	2fa60646-Overdrive	Overdrive	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	
3/3/2021 13:36	circulation_manager_check_out	a7db6f28-Overdrive	Overdrive	I Crawl Through It	King, A. S.	fiction	Young Ad	Hachette	I Little, Brov	eng	17-Dec		
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3/3/2021 13:41	open_book	2fa60646-Overdrive	Overdrive	Midnight Promises	Woods, Sherryl	fiction	Adult	MIRA Boo	MIRA	eng	18-	Romance	

The columns listed on the CSV include time, event, identifier, identifier type (vendor/book source), title, author, fiction/non-fiction, audience, publisher, imprint, language, target age, genres, and location. Any of these columns can also be collapsed or removed when sorting the spreadsheet.