

Library Reports on the SirsiDynix System

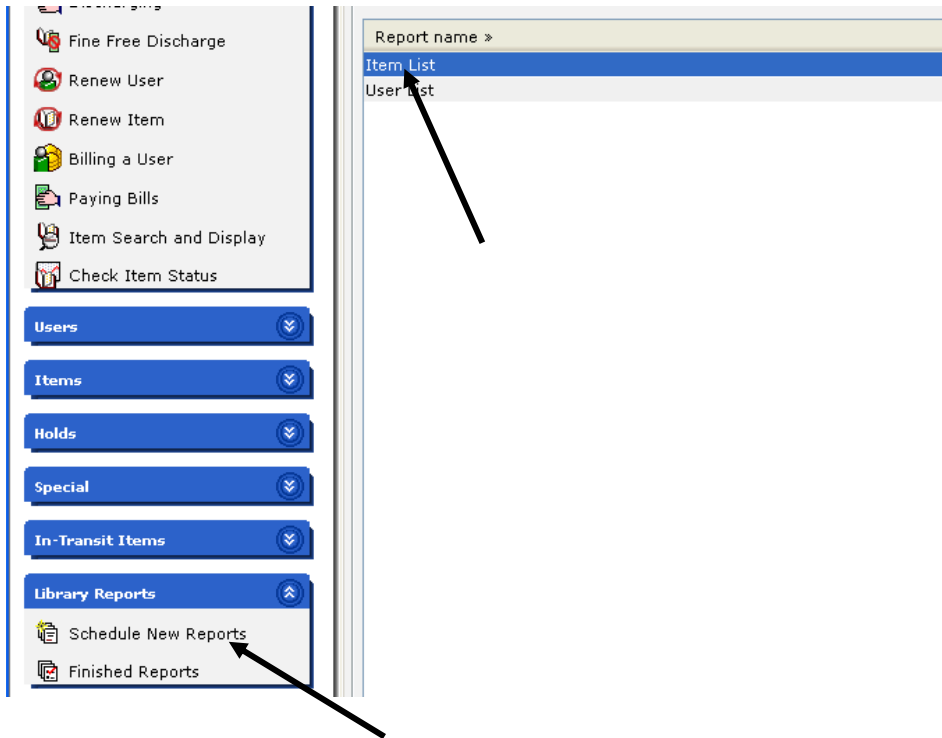
Types of Reports

- Item List
A list of items selected by certain criteria for the library and sorted by call number.
- User List
A list of users selected by certain criteria for the library and sorted by user name.

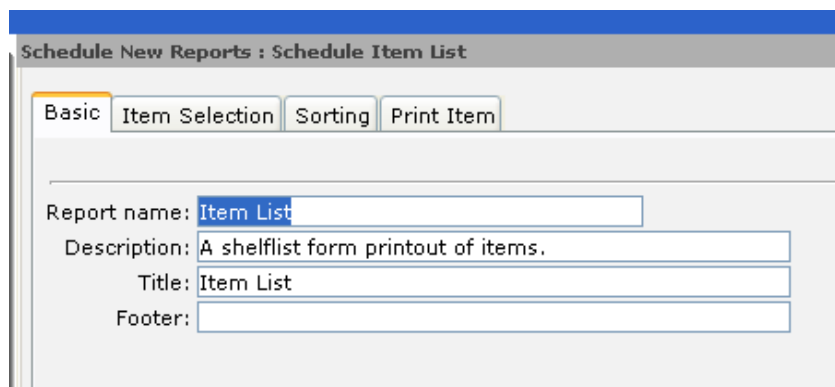
Things to know before running a report:

- Gadget – is the little box located to the right of a field. This will display the “Policy List” for that particular field. Example – User Category 2 : the gadget will display a list of counties.
- You get what you ask for – if your selection is Item Type A-FIC, you will get all items with that Item Type. If an easy book was given the Item Type A-FIC it will be included in the list. If some of the fiction is A-FIC-NEWB, they will not be included in your report.
- Please be sure to select your library from the Library Gadget.
- **DO NOT save any reports as a template and DO NOT schedule any reports. You will always select “Run Now.”**

Setting up the Item List report



1. Click on the Schedule New Reports wizard
2. Click on Item List
3. Click on the Setup & Schedule button



Basic Tab

Report name:

- This is the name for the Finished Reports list. You may leave the default report name or type in another.

Description:

- This is a description for the report. You may leave the default description or type in another.

Title:

- This is the heading on the report's pages. You may leave the default title or type in another.

Footer:

- This is the Footer on the report. You may leave it blank or type in a footer

Item Selection Tab

Basic **Item Selection** Sorting Print Item

Library:

Home location:

Current location:

Item type:

Item category 1:

Item category 2:

Extended info:

blank field matches with Not Equal qualifier

Number of pieces:

Date created:

Last activity date:

Date last charged:

Number of total charges:

Number of inhouse charges:

Library

- Use the gadget to select your library.

Home Location

- If you want only items from certain locations in your report, use the gadget to select locations. If no value is selected, all locations are included.

Current Location

- All items have a current location (checkedout, missing, stacks etc.). The current location is typically the same as the home location, unless the item is CHECKEDOUT, or charged to a special status user with a location such as LOST or MISSING. If you want to limit your report results to certain current locations, use the Policy List gadget to select locations. If no value is selected, all locations are included. (If you want to include all locations EXCEPT Discard, missing, lost and/or Checkedout, use the gadget, select Exclude selected policies and choose those locations you do NOT want in your report.)

Item Type

- To limit your report results to certain item types, use the gadget to select those item types. If no value is selected, all item types are included.

Item Category 1

- To limit your report results to a certain Item Category 1, use the gadget to select categories. If no value is selected, all Item Category 1 policy names are included.

Item Category 2

- To limit your report results to certain Item Category 2, use the gadget to select categories. If no value is selected, all Item Category 2 policy names are included.

Extended Info

- Items selected will have a specified text in a specific field of the Extended Info section. To select a specific entry ID and text, use the gadget.

The screenshot shows a dialog box titled "Gadget : VED List". It contains the following elements:

- Entry ID:** A dropdown menu.
- Occurrences:** Radio buttons for "Any", "1", "2", "3", "4", and "5".
- Operator:** Radio buttons for "Contains", "Equals", and "Not equals".
- Search strings:** A text input field with a search icon.
- Table:** A table with four columns: "Entry ID >", "Occurrences", "Operator", and "Search string". The table is currently empty.
- Buttons:** "Add", "OK", "Remove", and "Cancel" buttons at the bottom.

1. In the **Entry ID** box, select the field that will contain the specified text in the format that you selected.
2. Under **Occurrences:**
 - Click Any to search for any occurrence of the text in that particular entry ID within that particular field.
 - If the Entry ID is a repeated field in the format that you selected, such as Extended Info, click which occurrence (the first through fifth) of the field the selected text should display. Click Any to search for any occurrence of the text in that particular entry ID within that particular address field.
3. Under Operator, click one of the following options.
 - **Contains** – Includes the text phrase anywhere in the specified field type.
 - **Equals** – This text will be the only text in the specified field type.
 - **Not Equals** – All records that have text typed into the specified field type will be selected, records which have only this text in the field will be eliminated.
4. In the **Search Strings** box, use the [String List](#) gadget to create a text string, or lists of text strings that the report results should contain, be equal to, or not equal to.
Click **Add** to add this entry to the list.
5. To remove an entry in the list, select the entry and click **Remove**.
6. When finished building your list, click **OK**.

Number of pieces

- To limit your report to items containing a number of pieces, use the gadget to set the number desired.

Date Created

- To limit your report results to a certain date in which the item was imported or created in Workflows, use the gadget to select a date, or date range. If no date is entered, all records are included regardless of their creation date.

Last Activity Date

- To select items by the last activity date, use the gadget to pinpoint a date or range of dates. If no date is entered, all records are included.
- The following actions will change the latest activity date...
 - Inventory Item
 - Mark Item Missing
 - Mark Item Lost
 - Mark Item Used
 - Checkout
 - Renew User Charges
 - Renew Single Item
 - Discharge/Checkin
 - Checkin Bookdrop Items
 - Place Hold-Copy Level only
 - Remove User Holds
 - Remove Item Hold

Date Last Charged

- Use the gadget to limit your report results to a certain date or range of dates an item was last charged to a user. If no date is entered, all records are included.

Number of Total Charges

- To limit your report results to a certain number of charges since the item was created, select a number or range of numbers by using the gadget.

Number of inhouse charges

- To limit your report results to just the number of inhouse charges, select a number or range of numbers by using the gadget.

Sorting Tab

- The default for the sort is by call number. The sort may be changed to title/author by clicking on the dropdown menu.

Print Item Tab

The screenshot shows a software window titled "Schedule New Reports : Schedule Item List". It has four tabs: "Basic", "Item Selection", "Sorting", and "Print Item", with "Print Item" being the active tab. The window contains three main sections of options:

- Top Section:** Four radio buttons for selection: "First Call number, Publication year, Entry list", "Publication year, then entry list", "Entry list only" (which is selected), and "None". Below these is a text field labeled "Entry list:" containing the value "245". Underneath are three radio buttons for "Entry labeling options": "Descriptive labels", "Entry IDs as labels", and "Data only" (which is selected). A checkbox labeled "Show indicators and subfields" is also present.
- Call Number Information Section:** Four radio buttons: "All call number information", "Call number only" (selected), "No call number information", and a checkbox "Call number bound-with links".
- Item Information Section:** Five radio buttons: "All copy information", "Brief copy information" (selected), "Abbreviated copy and circulation information", "No copy information", and a checkbox "Circulation summary". A checkbox "Bills" is also present.

At the bottom of the window, there are four buttons: "Schedule", "Run Now (b)", "Save As Template", and "Cancel".

Title Information

- Shows title level information, including the information to be included in the bibliographic display. Typically the defaults selected here should remain unchanged.

Call Number Information

- Shows call number level information, including bound-with information. These settings are rarely changed.

Item Information

- Displays circulation and inventory statistics, bills, charges, and holds information. The Item Information selections determine what item information will print in the report output.

All copy information: Prints item information, including the copy number, item ID, the item library, the price as listed in the item record, item categories one and two (these may have more descriptive labels in your library), home and current locations, the date the item was created, the Item Type and whether the item is permanent.

The following is a sample report output using the all copy information option.

```
copy: 1   id: 33-1001       library: MAIN   price: $10.00
cat1:           cat2:           home: STACKS   current: CHECKEDOUT
created: 12/9/1996       type: BOOK     permanent
```

Brief copy information: Prints the most item information available. This option prints the copy number, item ID, the item library, and the item's current location.

The following is a sample output using the brief copy information option.

```
copy:1   id:33-1001   library:MAIN   location:CHECKEDOUT
```

Abbreviated copy and circulation information: Prints brief item and circulation information in a concise table format. In a single library system or a multilibrary system, selecting this option will print the abbreviated copy and circulation information includes the copy number, the item ID, the item type, the home location, the price as listed in the item record, the date the item was created, and the number of times the item has been circulated in the report output.

The following is a sample output using the abbreviated copy and circulation information option.

CPY	ITEM ID	Item Type	LOCATION	PRICE	CREATED	#CIRC
1	33-1001	BOOK	STACKS	\$15.00	12/9/1996	270

No copy Information : Suppresses the printing of any item information in the report output.

Circulation summary : Select the Circulation Summary check box to include the number of total charges, number of current charges, number of outstanding bills, number of holds, number of in-house charges (indicating the item had been "used"), circulate flag which indicates whether the item can be charged (Y/N) and last used, which indicates when the item was last used or charged.

The following is a sample report output using the circulation information option.

```
total charges:27   charges:1   bills:2   holds:1
in-house charges:0   circulate flag:N   last used:11/13/2003
```

Bills: Select the Bills check box to print all of the item's current bills, both paid and unpaid, in the report output. The Bills lists the number of bills not yet paid in full. For each bill, the user ID, the user name, the amount, the bill reason, the remaining balance, and the library that sent the bill appears in the report output.

The following is a sample report output using the bills option.

```
*Bills:2
  user id:EMILY
  name:Emmet, Emily
  amount billed:$7.00   bill reason:OVERDUE   balance:$4.00   MAIN
  user id:EMILY
  name:Emmet, Emily
  amount billed:$3.00   bill reason:OVERDUE   balance:$3.00   MAIN
```

Charges: Select the Charges check box to print all of the item's current charges, with the first field reflecting the number of current charges (usually zero for not charged, or one for charged, unless the item has recirculated or the circulation override has been used). For each charge, the user ID and user name, the dates charged, due, renewed, and recalled, the number of renewals, the number of overdue and recall notices, the current location, and the library that holds the item are displayed.

The following is a sample report output using the charges option.

```
*Charges:1
  user id:EMILY
  name:Emmet, Emily
  charged:11/13/2003,17:44   due:11/15/2003,1:55   renewed:11/14/2003,11:55
  recalled:                 renewals:7   overdue notices:11   recall notices:0
  location:CHECKEDOUT      MAIN
```

Hold: Select the Holds check box to print all of the item's current holds in the report output, with the first field reflecting the number of current holds. For each hold, the user ID and user name, the user's hold priority, the date the hold was placed, the date the hold expires and/or is no longer needed by the user, the date that the user was last notified for pickup, the number of pickup notices sent, any hold comment, whether the hold is a reserve item, if the item on hold is available, and whether it is a call number, copy, title, or system level hold are displayed. The library that holds the item as well as the library where the item will be picked up displays. The pickup library is defined by the staff or user who places the hold.

The following is a sample report output using the holds option.

```
*Holds:1
  user id:OCHET
  name:Wright, Chet
  priority:310   placed:12/3/2003   expires:7/1/2004   notified:1/30/2004
  notices:1   comment:reserve:NO   available   type:TITLE
  MAIN item from library:GREENFORD
```

Copy Comments: Select the Copy Comments check box to print all the Comments entry IDs in the Extended Information section of the item's bibliographic record in the report output.

The following is a sample report output using the copy comments option.

```
*Comments:
This title is available from the EPA upon request.
```

Inventory Information: Select the Inventory Information check box to list the number of times the item was inventoried and the last date of inventory in the report output.

The following is a sample report output using the inventory information option.

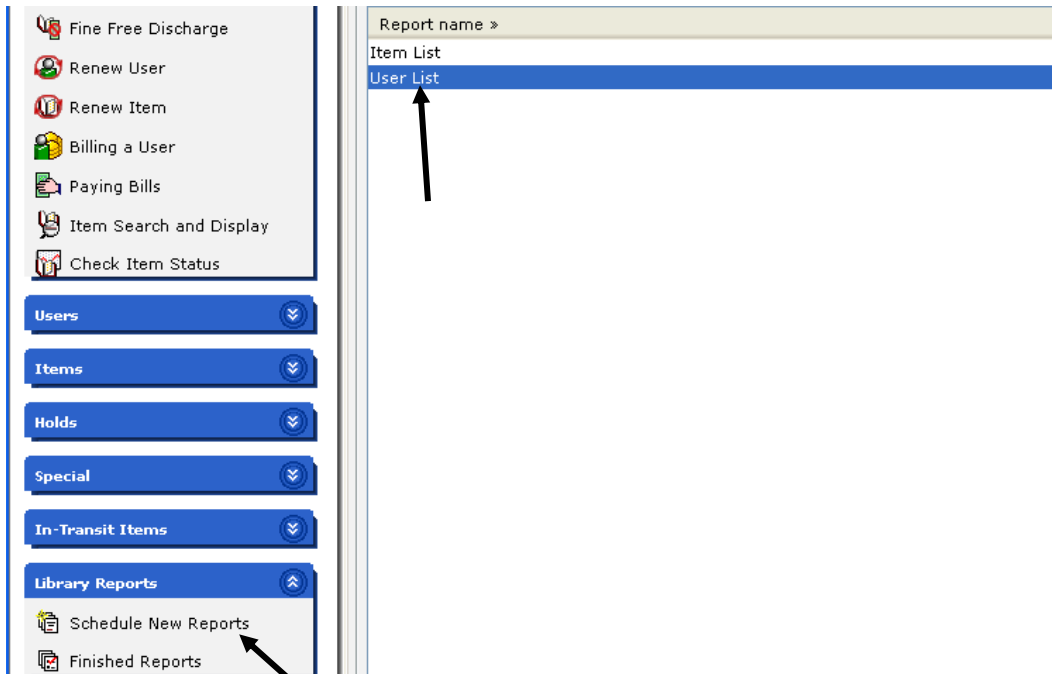
```
times inventoried:1   date inventoried:6/1/2004
```

Click RUN NOW

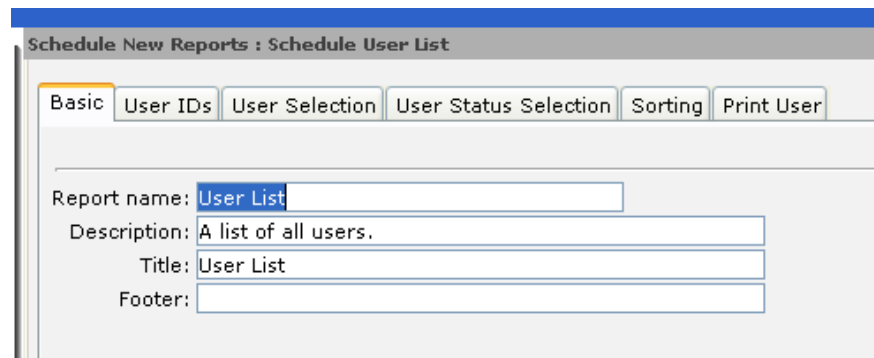
*****Do not click Schedule**

*****Do not click Save as Template**

Setting up the User List Report



1. Click on the Schedule New Reports wizard
2. Click on User List
3. Click on the Setup & Schedule button



Basic Tab

Report name:

- This is the name for the Finished Reports list. You may leave the default report name or type in another.

Description:

- This is a description for the report. You may leave the default description or type in another.

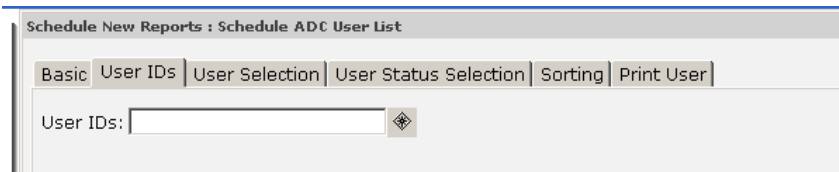
Title:

- This is the heading on the report's pages. You may leave the default title or type in another.

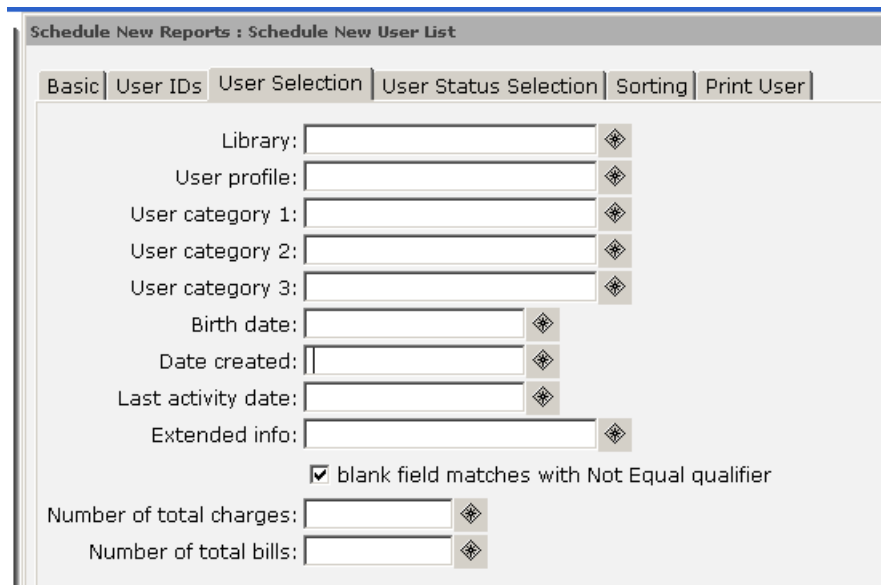
Footer:

- This is the Footer on the report. You may leave it blank or type in a footer

User ID Tab



- To select one user, type in the user ID of a specific User. If no value is selected, all users are included.



User Selection Tab

Library

- Use the gadget to select your library

User Profile

- To limit your results to certain profiles, use the gadget to include or exclude profiles. If no value is selected, all user profiles are included.

User Category1 - User Category2 –User Category3

- To limit your results to certain categories, use the gadget to add or remove a User Category. If no value is selected, all values for that User Category policy are included.
User CAT1 – Town/Village User CAT2 – County UserCAT3 – Library District

Birth date

- All users in the report have the specified birth date. To select a single date or range of dates, use the gadget. If no value is selected, all birth date are included.

Date Created

- To limit your results to users whose records were created on a specified date or range of dates, use the gadget. If no value is selected all records are included regardless of creation date.

Last Activity Date

- To limit your results to users who have been active during a particular period, use the gadget to set your date information. If no value is selected, all records will be included.
- Activity dates are modified in a user's record when items are charged, discharged, renewed, a user is billed, bills are paid, a user is registered (the last activity date is updated to the date created) or a hold is placed.

Extended Info

- Users selected by this report will have the specified text in a specific field of the Extended Info section. To select a specific entry ID and text, use the VED List gadget.

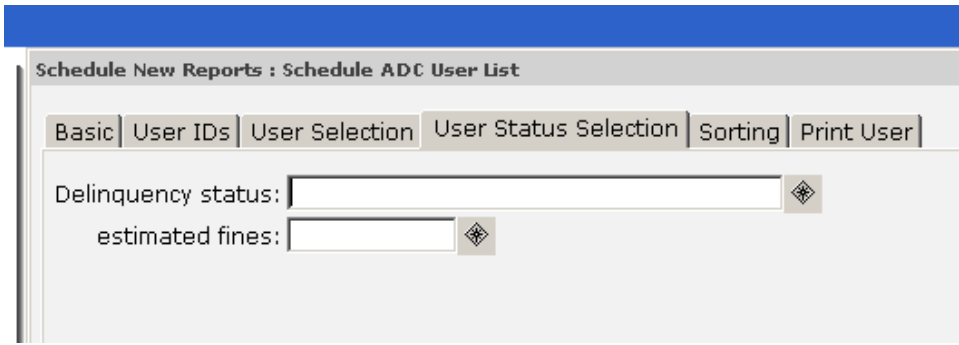
Entry ID »	Occurrences	Operator	Search string
------------	-------------	----------	---------------

1. In the **Entry ID** box, select the field that will contain the specified text in the format that you selected.
2. Under **Occurrences**:
 - Click Any to search for any occurrence of the text in that particular entry ID within that particular field.
 - If the Entry ID is a repeated field in the format that you selected, such as Extended Info, click which occurrence (the first through fifth) of the field the selected text should display. Click Any to search for any occurrence of the text in that particular entry ID within that particular address field.
3. Under Operator, click one of the following options.
 - **Contains** – Includes the text phrase anywhere in the specified field type.
 - **Equals** – This text will be the only text in the specified field type.
 - **Not Equals** – All records that have text typed into the specified field type will be selected, records which have only this text in the field will be eliminated.
4. In the **Search Strings** box, use the [String List](#) gadget to create a text string, or lists of text strings that the report results should contain, be equal to, or not equal to.
Click **Add** to add this entry to the list.
5. To remove an entry in the list, select the entry and click **Remove**.
6. When finished building your list, click **OK**.

Number of Total Charges and Number of total bills

- Use the gadget to select a number equal to or greater than/less than for charges or bills. If no value is selected, all records will be included.

User Status Selection Tab



Delinquency Status

- All users in the report are either OK, DELINQUENT, BLOCKED, or BARRED statuses. Use the gadget to add or remove a delinquency status. If no value is selected, all statuses are included.

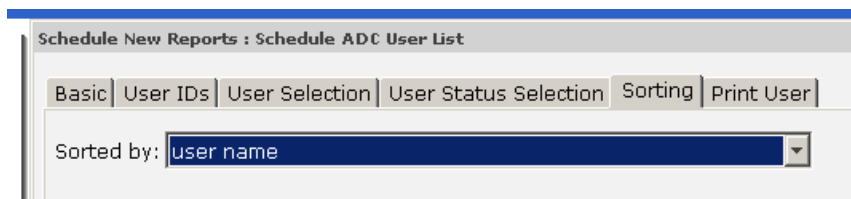
Delinquency type

- All users in the report are either OK, DELINQUENT, BLOCKED, or BARRED types. Use the gadget to add or remove a delinquency types. If no value is selected, all statuses are included

Estimated Fines

- Users selected by the report will have a total amount of estimated fines meeting the amount selected. Estimated fines are the total of the fine amount for individual current overdue charges. In the Checkouts tab when a user is displayed, the glossary from the due date for each charge displays the individual Fine amount. The estimated fines amount is displayed at the top of the tab, in parenthesis next to the number of checkouts for that user. Use the gadget to select the estimated fines amount. If no value is selected, all records will be included.

Sorting Tab



- You may choose to have your report sort differently by selecting another option from the drop down menu.

Print User Tab

Schedule New Reports : Schedule ADC User List

Basic | User IDs | User Selection | User Status Selection | Sorting | Print User

User Information

Address Address entry:

Circulation numbers Demographics

Extended information Extended info. entry:

Profile information General information

Bill Information

Bills: All Paid Unpaid None

Format: Brief Full No bill information

Charge Information

Charges: All Overdue None

Format: Brief Full No charge information

Hold Information

Holds: All Available None

Format: Brief Full No hold information

Record per page

Schedule Run Now Save As Template Cancel

User Information

- Prints basic user information from the user record and circulation statistics. Bill Information prints bills; both paid and unpaid, including associated bibliographic items. Charge Information prints charges, including bibliographic information. Holds Information prints all holds or only available holds, including bibliographic information.

Address

- Select this check box to print the user's address information. All three User Addresses will be printed. Determine information to print by making selections in the in the Address entry gadget.

Address Entry

- Use the entry ID gadget to select either specific entries, or all entries that display in a specific format of User address. Empty entries do not print.

Circulation Numbers

- Select this check box to include the user's profile, a delinquency status of either OK, DELINQUENT, BLOCKED, or BARRED, the total number of charges since the user has had library privileges, the total number of current bills, both paid and unpaid, the number of current charges, the number of bills not paid in full, the number of holds, both available and not available.

Demographics

- Select this check box to include the date the user record was created, the last charge activity, the date library privileges were granted and the date the privilege will expire, if defined, user categories one and two, and birth date.

Extended Information

- Select this check box to print the user's extended information. Determine information to print by making selections in the Extended Info entry.

Extended Info Entry

- Use the entry ID gadget to select either specific entries, or all entries that display in a specific format of Extended Info. Empty entries do not print.

Profile Information

- Select this check box to include the user's profile. If you also select Circulation Numbers, the user's profile will print twice in the output.

General Information

- This check box must always be selected and prints the following basic user information: title, user name, user ID, and library.

Example User with all User Information Selected

General Information

Mr. Moore, David Phillip id:DAVID library:MAIN

Address

mailing address:1

Address1:

Daytime Phone:205-922-4321

Street:3456 University Drive

City, State:Huntsville, AL

Zip:35811

Extended Information

Extended Information:

Comment:David loses a lot of library cards.

Circulation Numbers

profile:PUBLIC status:DELINQUENT total charges:27 total bills:7

charges:3 bills:1 holds:1

unanswered requests:0 distributions:0

Demographics

created:11/24/1997 last use:1/13/1998 priv granted:12/22/1997

priv expires:1/1/2000 cat1:INACTIVE cat2:ACADEMIC birth:1969

Profile Information

profile:PUBLIC user access:STUDENT environment:GENERIC

dept:PUBS group id:MOORES outreach user:YES

Bill Information Output

Bills

- Select All to print all of a user's billing information, select Paid to print only completed billing information, or select Unpaid to select the user's bills that are not yet resolved.

Format

- Included with all billing information is the number of bills. The number of bills reflects only those bills that are not paid in full. If the bill is associated with an item, bibliographic information including the call number, copy, library, title, and author is included. Bill information includes the total amount billed, the reason for the bill, and the unpaid balance.

Select Brief to print the preceding bill information only.

Select Full to print the preceding bill information plus the date the bill was issued, the library issuing the bill, and the date of the most recent payment.

Note: If you decide to print bill information, you must make a choice in both the Bills and Format sections.

Example User with All Bills and Brief Format

```
Mr. Moore, David Phillip id:DAVID alt id:DPM library:MAIN
*Bills:1
E78 .A7 G72 copy:1
Canyon de Chelly, its people and rock art / Campbell Grant.
Grant, Campbell, 1909-
amount billed:$2.00 reason:OVERDUE balance:$0.00

PZ7 .R62 WI 1991 copy:1
Con mi hermano / por Eileen Roe ; ilustraciones por Robert Casilla ; [Spanish translation by Jo Mintzer] = With my brother / by
Eileen Roe ; illustrated by Robert Casilla.
Roe, Eileen.
amount billed:$10.00 reason:LOST balance:$0.00
amount billed:$15.00 reason:PROCESSFEE balance:$0.00

Q175.2 .K73 1987 copy:1
How to think like a scientist : answering questions by the scientific method / Stephen P. Kramer ; illustrated by Felicia Bond.
Kramer, Stephen P.
amount billed:$7.00 reason:DAMAGE balance:$7.00
```

Example User with Unpaid Bills Only and Full Format

```
Mr. Moore, David Phillip id:DAVID alt id:DPM library:MAIN
*Bills:1
call number:Q175.2 .K73 1987 copy:1 MAIN
How to think like a scientist : answering questions by the scientific method / Stephen P. Kramer ; illustrated by Felicia Bond.
Kramer, Stephen P.
amount billed:$7.00 reason for bill:DAMAGE date billed:1/13/1998
balance:$7.00 billed by:MAIN date paid:NEVER
```

Charge Information Output

Charges

- Select All to print all current charges, or Overdue to print only the charges that are overdue.

Format

- Included with all charge information is the number of charges and bibliographic information which includes the call number, copy, library, title, and author. Charge information includes the date the item was charged and the date that it is due.

Select Brief to print the preceding charge information, plus the price as it displays in the Copy Info section of the item record.

Select Full to print the preceding charge information, plus the number of overdue notices that have been sent, the fine that has accrued for this particular charge, the date that the charge was last renewed, the number of times the charge was renewed, the date the item was recalled from the user, the number of recall notices that were sent, the current location of the item, which is usually CHECKEDOUT, and the library that charged the item to the user.

Note: If you decide to print charge information, you must make a choice in both the Charges and Format sections.

Example User with All Charges and Brief Format:

```
Mr. Moore, David Phillip id:DAVID alt id:DPM library:MAIN
*Charges:3
PZ7 .R62 WI 1991 copy:1 MAIN
Con mi hermano / por Eileen Roe ; ilustraciones por Robert Casilla ; [Spanish translation by Jo Mintzer] = With my brother / by
Eileen Roe ; illustrated by Robert Casilla.
Roe, Eileen.
charged:12/26/1997,14:13 due:1/12/1998,16:59 price:$.00

XX(678.1) copy:1 MAIN
Guns for women : the complete handgun buying guide for women / by George Flynn and Alan Gottlieb.
Flynn, George.
charged:12/31/1997,13:04 due:NEVER price:$9.95

HV6431 .T487 1990 copy:1 MAIN
Terrorism, protest, and power / edited by Martin Warner, Roger Crisp.
Warner, Martin.
charged:1/7/1998,16:10 due:NEVER price:$.00
```

Example User with Overdue Charges Only and Full Format

```
Lt Wright, Chet id:CHET alt id:206.154.245.139 library:GREENFORD
*Charges:4
call number:KF9630 .B87 1987 copy:1 MAIN
Search warrant law deskbook / John M. Burkoff.
Burkoff, John M.
charged:12/29/1997,11:00 due:1/12/1998,23:59 overdue notices:1
fine:$2.20
renewed:12/29/1997,11:03 renewals:1 recalled: recall notices:0
location:CHECKEDOUT charged by:MAIN
```

Holds Information

Holds

- Select All to print all of a user's holds, or select Available to print only the holds that are available for the user to pick up. Only active holds are printed.

Format

- Included with all holds information is the number of holds and bibliographic information which includes the call number, library, title, and author.

Select Brief to print the preceding holds information only.

Select Full to print the preceding holds information, plus the user's hold priority, the date the hold was placed, the date the hold expires and is no longer required by the user, the date the user was notified to pick up the hold item, the number of pick-up notices sent, any hold comments, whether the particular hold is available, the hold type of either rush, standard, or none, and the library where the hold was placed.

*If you decide to print holds information, you must make a selection in both the Holds and Format sections.

Example Users with and without Holds in Brief Format

```
Lt Wright, Chet id:CHET alt id:206.154.245.139 library:GREENFORD
*Holds:1
TR365 .B37 1991 GREENFORD
The daguerreotype : nineteenth-century technology and modern science / M. Susan Barger and
William B. White.
Barger, M. Susan, 1949-

Rabun, Johns id:JOHNS library:MAIN
*Holds:0

Miss Young, Mary Edith id:MARY library:MAIN
*Holds:1
PN771 .G27 MAIN
Twentieth-century literary criticism.
Gale Research Company.
```

Example User with Available Holds in Full Format

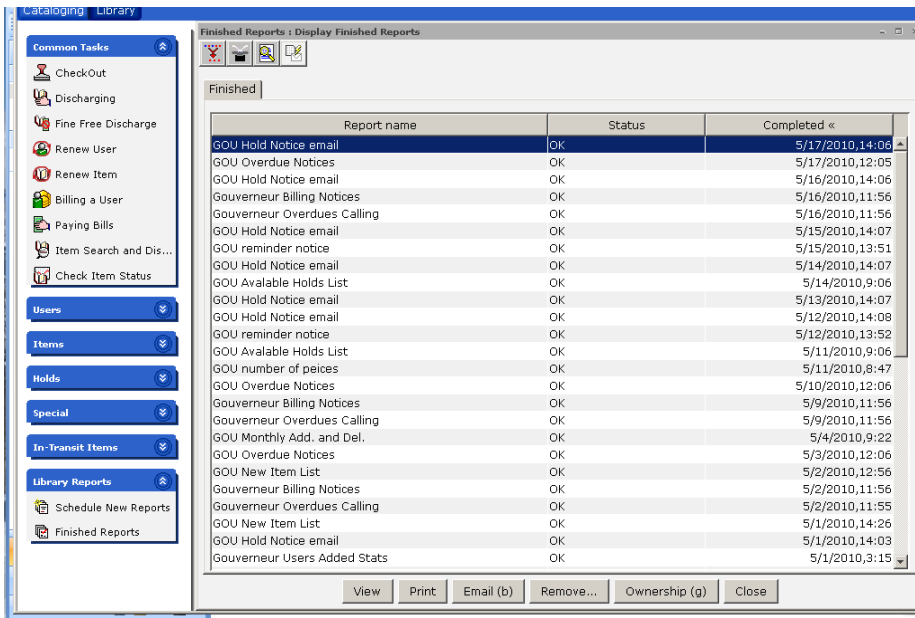
```
Lt Wright, Chet id:CHET alt id:206.154.245.139 library:GREENFORD
*Holds:1
call number:TR365 .B37 1991 GREENFORD
The daguerreotype : nineteenth-century technology and modern science / M. Susan Barger and
William B. White.
Barger, M. Susan, 1949-
priority:310 placed:12/3/1997 expires: notified:
notices:0 comment:
reserve:NO available type:CALL placed by:MAIN
```

Click RUN NOW

******Do not click Schedule a Report***

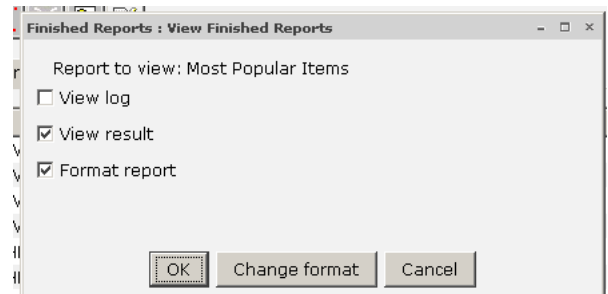
******Do not click Save as Template***

Finished Reports



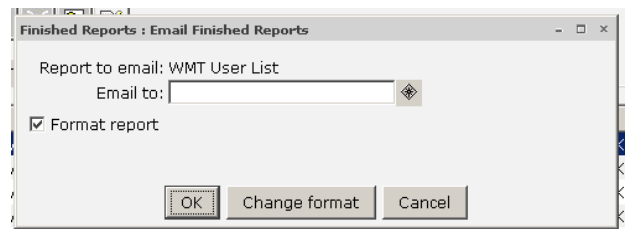
To View

Highlight the report and click View
Putting a Check mark in View Log displays the description of how the results were selected. If printing your report, you will not want to check View log.
Click on OK



To Email

Highlight the report and click Email
Type in the email address of the person
Click on OK



To Remove

There is no need to remove reports. The NCLS staff will remove reports.

To Close

Click on CLOSE to exit Finished Reports