

Library Reports

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

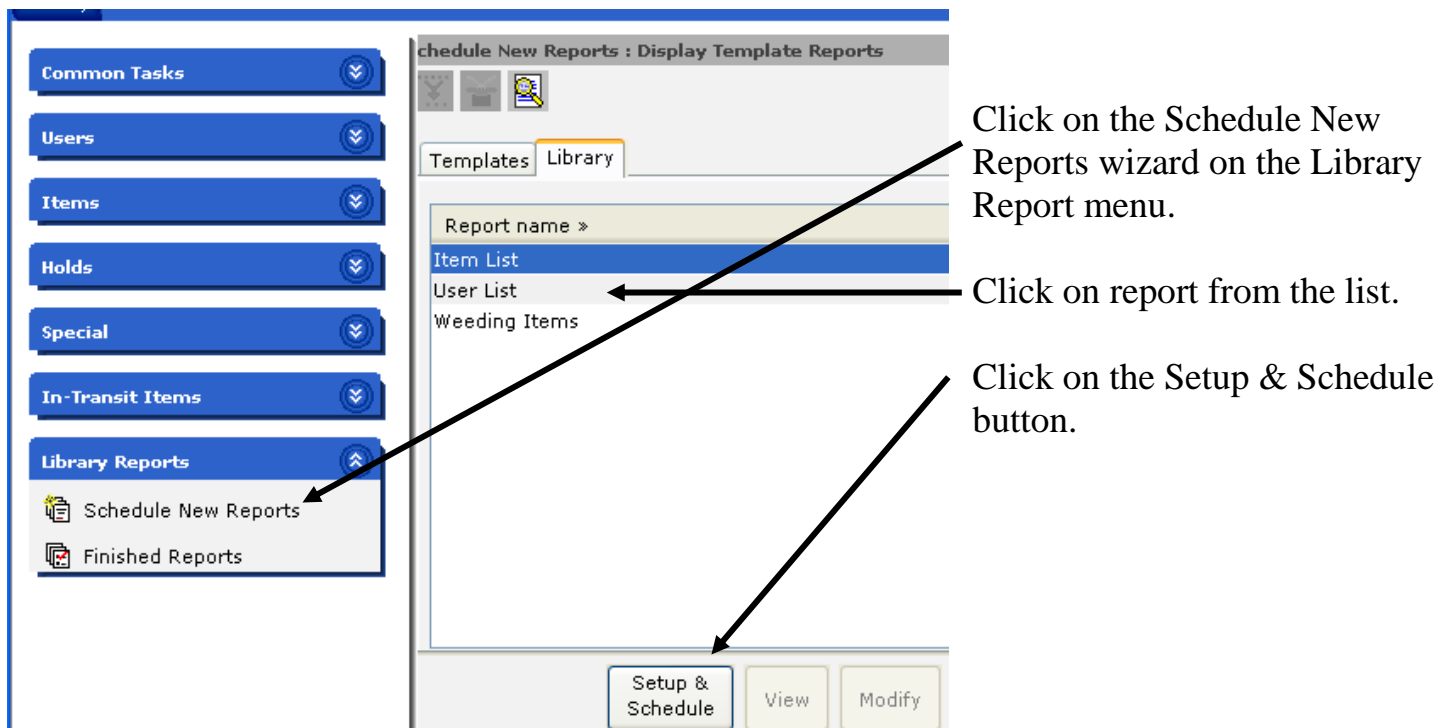
User List - A list of users selected by certain criteria for the library and sorted by user name.

Weeding Items List - A list of items selected by certain criteria for the library for potential weeding.

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 or schedule reports. You will always select “Run Now.”**

Setting up a Report



The screenshot shows the 'Schedule New Reports : Display Template Reports' wizard. On the left is a navigation menu with categories: Common Tasks, Users, Items, Holds, Special, In-Transit Items, and Library Reports. Under Library Reports, 'Schedule New Reports' and 'Finished Reports' are listed. The main area shows 'Templates' and 'Library' tabs. Below, a list of report names is displayed: 'Report name >', 'Item List', 'User List', and 'Weeding Items'. At the bottom are three buttons: 'Setup & Schedule', 'View', and 'Modify'. Three arrows point from text annotations to the 'Schedule New Reports' menu item, the 'User List' report, and the 'Setup & Schedule' button.

Click on the Schedule New Reports wizard on the Library Report menu.

Click on report from the list.

Click on the Setup & Schedule button.

Item List Report

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

Screenshot of the 'Schedule New Reports : Schedule Item List' window. The 'Basic' tab is selected. The 'Report name' field contains 'Item List', 'Description' contains 'A shelflist form printout of items.', 'Title' contains 'Item List', and 'Footer' is blank.

Item Selection Tab

Library

- Use the gadget to select your library. This is never left **BLANK**

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.

Screenshot of the 'Schedule New Reports : Schedule Item List' window, Item Selection tab. The 'Library' field is selected. Other fields include 'Home location', 'Current location', 'Item type', 'Item category 1', 'Item category 2', 'Extended info', 'Number of pieces', 'Date created', 'Last activity date', 'Date last charged', 'Number of total charges', and 'Number of inhouse charges'. A checkbox labeled 'blank field matches with Not Equal qualifier' is checked.

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.

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**.

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 an "Add" button to its right.
- 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.

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

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,

Schedule New Reports : Schedule Item List

Basic | Item Selection | Sorting | **Print Item**

First Call number, Publication year, Entry list

Publication year, then entry list

Entry list only

None

Entry list: 245

Entry labeling options: Descriptive labels Entry IDs as labels Data only

Show indicators and subfields

Call Number Information

All call number information

Call number only

No call number information

Call number bound-with links

Item Information

All copy information

Brief copy information

Abbreviated copy and circulation information

No copy information

Circulation summary

Bills

Schedule Run Now (b) Save As Template Cancel

Item Information

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, home and current locations, the date the item was created, the Item Type and whether the item is permanent.

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.

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. 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.

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, circulate flag which indicates whether the item can be charged (Y/N) and last used.

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. 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.

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.

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, 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.

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.

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.

sample report output using the inventory information option.

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

Click RUN NOW

******Do not click "Schedule" or "Save as Template"******

User List Report

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

Screenshot of the 'Schedule New Reports : Schedule User List' window, Basic Tab. The 'Report name' field contains 'User List', 'Description' contains 'A list of all users.', 'Title' contains 'User List', and 'Footer' is empty.

User ID Tab

Screenshot of the 'Schedule New Reports : Schedule ADC User List' window, User IDs Tab. The 'User IDs' field is empty.

- 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. This is never left **BLANK**.

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.

Screenshot of the 'Schedule New Reports : Schedule ADC User List' window, User Selection Tab. Fields include Library, User profile, User category 1-3, Birth date, Date created, Privilege exp. date, Last activity date, Extended info, and Number of total charges/bills.

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 User Categories 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.

Privilege exp. Date

- Users selected by this report are scheduled to have library privileges expire on this specified 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 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.

In the **Entry ID** box, select the field that will contain the specified text in the format that you selected.

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 .

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.

Gadget : VED List

Entry ID:

Occurrences: Any 1 2 3 4 5

Operator: Contains Equals Not equals

Search strings:

Entry ID »	Occurrences	Operator	Search string

Add OK Remove Cancel

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.

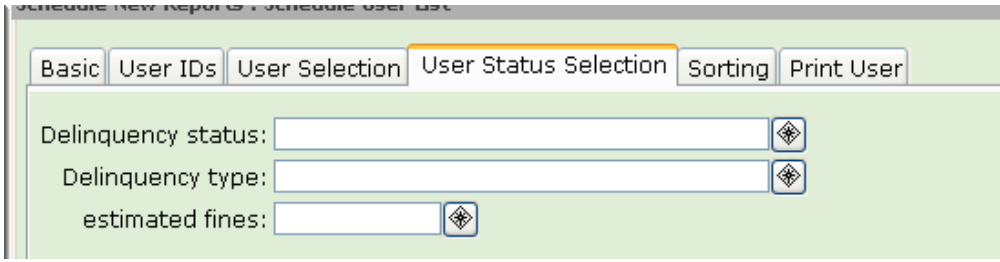
To remove an entry in the list, select the entry and click **Remove**.

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



The screenshot shows a software interface for scheduling reports. At the top, there are several tabs: 'Basic', 'User IDs', 'User Selection', 'User Status Selection' (which is highlighted), 'Sorting', and 'Print User'. Below the tabs, there are three input fields with selection icons (a diamond with a cross) to their right. The first field is labeled 'Delinquency status:', the second is 'Delinquency type:', and the third is 'estimated fines:'.

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.

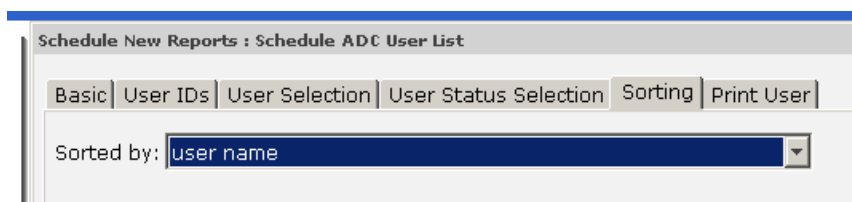
Delinquency type

- 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



The screenshot shows the 'Sorting' tab selected in the same software interface. The tabs at the top are 'Basic', 'User IDs', 'User Selection', 'User Status Selection', 'Sorting' (highlighted), and 'Print User'. Below the tabs, there is a label 'Sorted by:' followed by a dropdown menu that currently displays 'user name'.

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

Print User Tab

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.

The screenshot shows the 'Print User' configuration window. The 'Print User' tab is selected. The 'User Information' section has checkboxes for 'Address', 'Circulation numbers', 'Extended information', and 'Profile information', and a checked checkbox for 'General information'. There are also text entry fields for 'Address entry:' and 'Extended info. entry:'. The 'Bill Information' section has radio buttons for 'Bills: All, Paid, Unpaid, None' (with 'None' selected) and 'Format: Brief, Full, No bill information' (with 'No bill information' selected). The 'Charge Information' section has radio buttons for 'Charges: All, Overdue, None' (with 'None' selected) and 'Format: Brief, Full, No charge information' (with 'No charge information' selected). The 'Hold Information' section has radio buttons for 'Holds: All, Available, None' (with 'None' selected) and 'Format: Brief, Full, No hold information' (with 'No hold information' selected). At the bottom, there are checkboxes for 'XML output' and 'Record per page'.

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

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
```

Charge Information Output

Charges

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

Format

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.

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.
Roe, Eileen.
charged:12/26/1997,14:13 due:1/12/1998,16:59 price:$0.00

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:$0.00
```

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

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, and the library where the hold was placed.

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

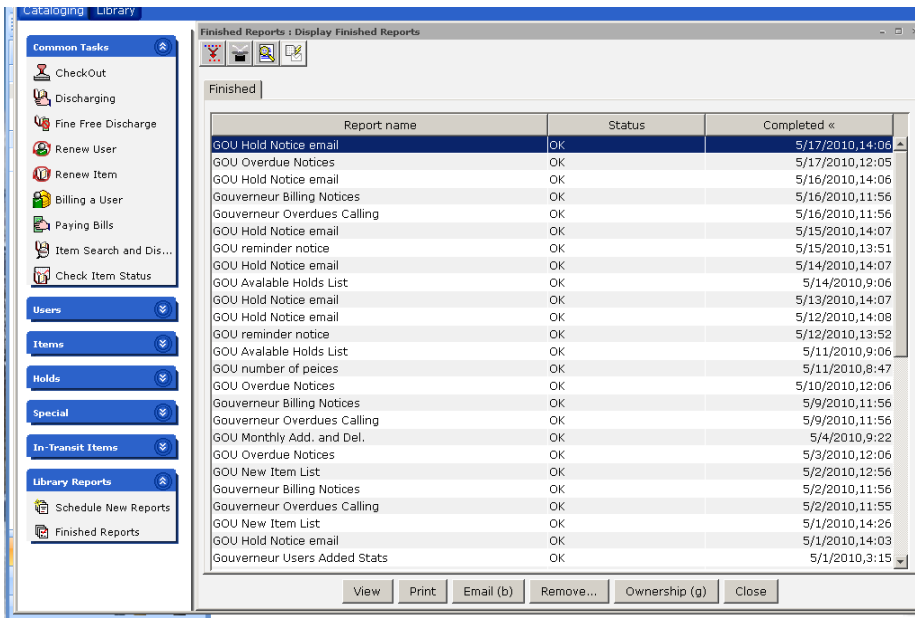
Twentieth-century literary criticism.

Gale Research Company.

Click RUN NOW

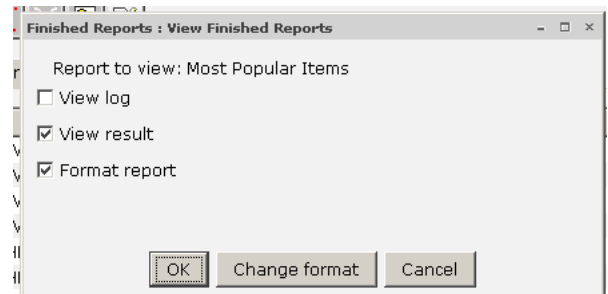
******Do not click "Schedule" or "Save as Template"******

Finished Reports



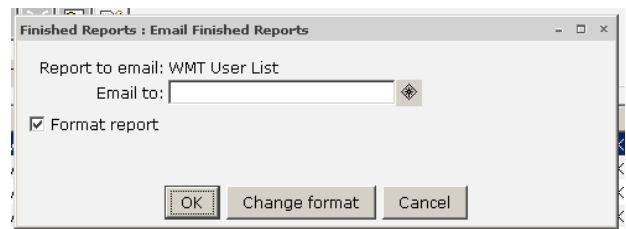
To View

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