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 add your library to the Library field when on the selection tab. Use the Library Gadget to place your library in the field.

- DO NOT save any reports as a template or schedule reports. You will always select ‘Run Now.’

Setting up a Report

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

Click on a 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.

**Style Sheet Tab**

Use this if you want to create the report as an Excel spreadsheet. Click the down arrow and Select the xsl file listed.

**Item Selection Tab**

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

**Home Location**
- If you want only items from a certain location in your report, use the gadget to select a location. 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.

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.
Date Modified
- All items in the report were last modified on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.

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.

Date Inventoried
- All items in the report were inventoried in on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.

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.

Price
- This is the price listed in the item record. To select a range of prices, use the Amount Range 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

Printed arrangement

- The **catalog shelflist** option prints a single bibliographic record and lists all call numbers and copies attached to the selected title.

- The **call number shelflist** option prints a bibliographic record for each call number, and lists all copies attached to the selected title and call number.

- The **record by record** option prints a bibliographic record for each copy or Item ID selected. In a Record by Record list, it is not possible to also use the Shadow Filtering options.

Output format

- Select XML if you are creating an Excel report. For all other reports select Standard.

Title Information

- The Title Information selections determine what title information will print in the report. The following Title Information selections may or may not be available, depending on the report. Typically the defaults selected here should remain unchanged.

Call Number Information

- The Call Number Information selections determine what call number information will print in the report. The following Call Number Information selections may or may not be available, depending on the report.

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
  recalled:  renewal:7  overdue notices:11  recall notices:0
  location:CHECKEDOUT  MAIN
```
**Holds:** 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
  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

When you made the selections on each tab, click the **Run Now** button and the report will be submitted. Reports normally take 1-5 minutes to run.

Click the Cancel button if you don’t want the report to run.
**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.

**Style Sheet Tab**

Use this if you want to create the report as an Excel spreadsheet. Click the down arrow and Select the xsl file listed.

**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.

**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.

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, Number of claims returned & 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**

**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 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

<table>
<thead>
<tr>
<th>General Information</th>
<th>Mr. Moore, David Phillip</th>
<th>id:DAVID</th>
<th>library:MAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mailing address:1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address1:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daytime Phone:</td>
<td>205-922-4321</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Street:</td>
<td>3456 University Drive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City, State:</td>
<td>Huntsville, AL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip:</td>
<td>35811</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Extended Information</th>
<th>Extended Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Comment:David loses a lot of library cards.</td>
</tr>
</tbody>
</table>
Circulation Numbers
profile:PUBLIC status:DELINQUENT total charges:27 total bills:7
  charges:3 bills:1 holds:1
  unanswered requests:0 distributions:0

Demographics

Profile Information
profile:PUBLIC user access:STUDENT environment:GENERIC
dep: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 W1 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, number of overdue notices that have been sent, fine that has accrued, date that the charge was last renewed, number of times the charge was renewed, 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 W1 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.

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, user's hold priority, date the hold was placed, date the hold expires and is no longer required by the user, date the user was notified to pick up the hold item, number of pick-up notices sent, any hold comments, whether the particular hold is available, 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.
If you are creating a report for Excel, select the XML output box

When you made the selections on each tab, click the **Run Now** button and the report will be submitted. Reports normally take 1-5 minutes to run.

Click the **Cancel** button if you don’t want the report to run.
Finished Reports

To View
Highlight the report and click View OR double click on the report. 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
The report will either open in WORD or EXCEL. (When opening a report in Excel there will be a couple of windows popping up, click 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