Report Components

Reports may consist of the following components: Basic Information, Selection Criteria, Sorting Criteria or Output Options.

Basic Information Tab

Basic Information is common to all reports. The following fields may have default values, but they can be edited.

Report Name	This name displays in the finished or scheduled report lists. It is also the name displaying in the template list, if left unchanged.
Description	This field describes the report results. The default value describes the report if it is run without making any changes to the Selection Criteria or Output Options tabs.
Title	This title displays on the first line of each formatted page of the printed report. The date and time that the report was produced follows the title.
Footer	When used, this field displays on the last line of each formatted page of the printed report. It can be used to record a date or range of dates that a report covers. Footers are optional.

Selection Criteria Tabs

Selection Criteria allows you to pinpoint subsets of users, copies, call numbers, titles, or a number of other data types, depending on the report. In other words, it limits the amount of data that is selected to modify your output. If selection options are available and you do not make any, and/or there are no defaults, all of the data in the selection tab phase is included.

In some reports, you may determine very specific data to select, such as individual users or item IDs. You can specify the primary information you wish to select by using the selection criteria verify list, a gadget, or typing the desired information in that field in the appropriate format.

Depending on the report and its goals, these additional types of selection criteria may be available. Reports that include a particular selection group, such as bills or holds, may or may not include each of the selection items listed. When making selections, you may have the option to use a gadget to make selections based on lists or ranges, or a verify list to make a single selection.

Checkout Selection

Reports that include a Checkout selection may or may not include all of the following selection criteria:

Library	All items in the report are either owned by the specified library or libraries, or were checked out from the specified library or libraries. The Library selection uses the configuration to base policies on owning library or checkout library. Use the Policy List gadget to select libraries. If no value is selected, all libraries are included.
Current Status	All items in the report are currently in this location. Often, this location is CHECKEDOUT for checked out items. Special status users such as LOST or MISSING may have corresponding user locations as well. Use the Policy List gadget to select locations. If no value is selected, all locations are included. **NOTE**: Items that are an INTRANSIT location type are not checked out to a special transit user, so they cannot be part of a checkout selection. If you want to select an item which is in transit, you must specify INTRANSIT, or your library's transit type of location, at the copy level selection for current status.
Date Checked Out	All items in the report were checked out on this specified date, and have not yet been returned. If no date is entered, all checked out items are included. To select a range of dates, use the Date Range gadget.
Date Due	All items in the report are due back in the library on this specified date. If no date is entered, all checked out items are included. To select a range of dates, use the Date Range gadget.
Overdue	If Yes, the report will include overdue items only. If no, all checked out items that are not overdue are included. Items are marked overdue by the Update User Delinquency Status report, which is scheduled to run nightly.
Accrued Fine	All checkouts in the report have accumulated fines of the amount specified for the current user. Fines are calculated by the Update User Delinquency Status report. To select a range of amounts, use the Amount Range gadget.
Date Renewed	All checkouts in the report were most recently renewed to the current user on the date specified. To select a range of dates, use the Date Range gadget.
Number of Renewals	All checkouts in the report were renewed this number of times by the current user. To select a range of numbers use the Number Range gadget
Date Claims Returned	All items in the report have a "claims returned" date specified. This claims returned date is the date that the user to whom the item is checked out claimed the item was returned to the library. To select a range of dates, use the Date Range gadget.
Date Notice Sent	All items in the report most recently had a notice sent to the user on the date specified. This date is updated by overdue notices that were generated using the Count as Notice Sent option. To select a range of dates, use the Date Range gadget.
Number of Overdue Notices	Each item in the report has had this number overdue notices sent to the user who has the item checked out. For this number to increment automatically, you must select "Count as notice sent" in the Checkout Notice output options. To select a

	range of numbers use the Number Range gadget. **NOTE:** If the Individual Overdue Notices report is run, the date the notice is sent is automatically updated and the number of notices sent is automatically incremented.
Circulation Rule	All checkouts in the report are associated with an item that was circulated according to this specified Circulation Rule policy. The users who can circulate the materials and the time period of circulation are contained in the Circulation Rule. If an alternate circulation rule was used, as in Academic Reserves, the alternate circulation rule is selected. Use the Policy List gadget to select circulation rules. If no value is selected, all circulation rules are included.

Item Selection

Reports that include a Item selection may or may not include all of the following selections.

Library	All items in the report are held by the specified library or libraries. Use the Policy List gadget to select libraries. If no value is selected, all libraries are included.
Shelf Location	All items in the report are cataloged to be in this location. Use the Policy List gadget to select locations. If no value is selected, all locations are included.
Current Status	All items in the report are currently in, or checked out to this location. The current status is typically the same as the shelf location, unless the item is CHECKEDOUT, or checked out to a special status user with a location such as LOST or MISSING. Use the Policy List gadget to select locations. If no value is selected, all locations are included. **NOTE**: Items that have a location type of INTRANSIT are not checked out to a special transit user, so they cannot be part of a checkout selection. If you want to select an item which is in transit, you must specify INTRANSIT, or your library's transit type of location, here at the copy level selection for current status.
Item Group	All items in the report are of this item group. Use the Policy List gadget to select item group. If no value is selected, all item groups are included.
Material Type	All items in the report have been designated to be of this category. Use the Policy List gadget to select a material type or types. If no value is selected, all Material Type policy names are included. **NOTE:** This field is not required and is used for statistical purposes only. If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to also run a report that limits by Item Group and include material type information in the formatting stage, to compare the accuracy of your results.

Funding Source	All items in the report have been designated to be of this category. Use the Policy List gadget to select a funding source. If no value is selected, all Funding Source policy names are included. **NOTE:** If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to also run a report that limits by Item Group and includes funding source information in the formatting stage, to compare the accuracy of your results.
Permanent	If Yes, the items in the report are part of the cataloged collection. If no, the items in the report will include only the temporary items in your collection, such as ILL or reserve materials on loan. **NOTE:** Use of this field must be consistent to properly maintain temporary and permanent collections.
Circulate	Copy selection based on this circulate value depends on two factors. The Circulate field must be enabled in the item. If an item is checked out, then the Recirculate field in the User Profile to whom the item is checked out must be enabled for the item to be selected. The items selected on this flag will vary, depending upon the outstanding checkouts at any given time. If Yes, the items in the report are items that will circulate based on both the item and user characteristics. If No, the items do not circulate, based on both factors. If neither are selected, both are included.
Extended Information	If Yes, items will be selected for the report only if text is entered into the Extended Information field in the bibliographic record. If no, items with text in the Extended Information field will be rejected. If neither are selected, both are included.
In the Shadow Catalog	If Yes, the items in the report will include only those items that are "shadowed," or coded by library staff to not display publicly to student users. If no, the shadowed items will be excluded from the report results. By default, both shadowed and non-shadowed materials are selected by the report. However, both does not display as the default selection. Its function is merely to allow the restoration of the initially empty value.
Number of Pieces	This field contains the number of pieces as stated in the copy record, which reflects the number of pieces associated with a single barcode. For example, a book on tape may have four cassettes but only one barcode on the case, so it might have one, four or five, in this field, depending whether your library counts the whole thing as a unit, counts the case as an individual piece or only each of the cassettes individually. The default in this field is one. To select a range of numbers, use the Number Range gadget. **NOTE:** This field is not required and is used for statistical purposes only. If your library does not enter the number of pieces consistently, you may get incorrect results.
Date Created	All items in the report were imported or created 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	All items in the report indicates the date the record was last used for any one of a wide range of activities. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.
Date Last Checked Out	All items in the report were last checked out to a user on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.
Date Last Checked In	All items in the report were last checked in from a user on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.
Date Inventoried	All items in the report were inventoried on this specified date. Inventories are conducted using the Inventory Report Group or by entering the Inventory Item wizard at the workstation. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.
Number of Times Inventoried	All items in the report were inventoried this number of times. Inventories are conducted using the Inventory Report Group or by entering the Inventory Item wizard at the workstation. If no number is entered, all records are included. To select a range of numbers use the Number Range gadget.
Number of Checkouts	All items in the report currently have this number of checkouts. For most items, this number will be either zero, indicating that the item is not checked out, or one, indicating that the item is checked out. If the item recirculates, or the circulation override has been used, however, there may be more than one checkout. To select a range of numbers, use the Number Range gadget.
Number of Total Checkouts	Each item in the report has been checked out this number of times since it was created, as recorded in the system. If the item circulated prior to cataloging, the number of checkouts may be entered manually. To select a range of numbers, use the Number Range gadget.
Number of Inhouse Checkouts	Inhouse charges imply that an item was taken from the shelf and scanned with the Mark Item Used wizard prior to being reshelved, but the item was never actually charged to a user. Each item in the report has been used inhouse this number of times since it was created in Unicorn. To select a range of numbers, use the Number Range gadget
Number of Copy Holds	All items in the report currently have this number of ACTIVE copy level holds, which means that the hold is placed on the specific copy, and not on the "first available" copy. To select a range of numbers, use the Number Range gadget.
Available on Hold	If Yes, the items in the report are currently available for pickup. If No, the report includes only those holds that are still checked out to other users or still on the shelf in libraries that cannot place holds on items on-shelf. If neither are selected, both are included.

Number of Bills	All items in the report currently have this number of outstanding bills, which have not been paid, or only partially paid. To select a range of numbers, use the Number Range gadget.
Price	All items in the report have this price listed in the item record. This amount is not necessarily the actual price paid. Usually, this amount is the price reported by the publisher along with the ISBN when the title was cataloged, if the record came from a bibliographic utility such as OCLC, or the default item price if the record was not imported or updated to reflect the actual price. To select a range of prices, use the Amount Range gadget.
Reserve Status	This selection is only useful to libraries that have the Academic Reserves module. All items in the report have this reserve status. Only one reserve status may be selected per report. Use the verify list to select a specific reserve status. If no value is selected, all reserve statuses are included.

Call Number Selection

The following Call Number selections may be available.

> **NOTE:** *All call numbers are printed for selected titles, even if specific call number selections were made.*

Library	All call numbers in the report are held by the specified library or libraries. Use the Policy List gadget to select libraries. If no value is selected, all libraries are included.
Call Number Range	All call numbers in the report fall within the specified call number range. Use the Call Number Range gadget to select your range. *(Remember, Call Number* ***includes*** *the Prefix used in your database).* For all 500 call numbers, enter this range: **500 - 599.99** For all Fiction call numbers, enter this range(depending on the prefix used in your database): **F A – F ZZZ** or **FIC A – FIC ZZZ** For all Easy B call numbers, enter this range (depending on the prefix used in your database): **E B – E BZZ** or **EASY B – EASY BZZ** **Etc. (Information about your call numbers/prefixes should be in Section 1.6a – Local Item Groups)**

Class Scheme	All call numbers in the report have been assigned the specified class scheme. One reason to specify a Class Scheme is to exclude call numbers that would fall within a specified range, but are not actually a part of the shelf listing that you require. For instance, the alphanumeric PERIODICAL will show up between the PE and PF titles in the Library of Congress scheme, unless only call numbers in the class scheme LC are selected. Use the gadget to select Class Schemes. If no value is selected, all Class Schemes are included. *NOTE:* If your library has not been consistent when creating and loading catalog records to distinguish between alphanumeric and other class schemes, this option will not return the desired results.
Number of Copies	All call numbers in the report have the specified number of copies. This is based on the actual number of copies, not the copy numbers, which may or may not reflect the actual number of copies. To select a range of numbers, use the Number Range gadget.
Number of Call Holds	All call numbers in the report have the specified number of holds at the call number level. To select a range of numbers, use the Number Range gadget.
Number of Copies on Reserve	This selection is only useful to libraries with the Academic Reserves module. All call numbers in the report have the specified number of copies at the reserve desk. To select a range of numbers, use the Number Range gadget.
Shadowed	If Yes, all call numbers selected by the report are in the shadow catalog, which is searchable by staff only. If No, none of the call numbers selected by the report will be in the shadow catalog. By default, both shadowed and non-shadowed materials are selected by the report. However, both does not display as the default selection. Its function is merely to allow the restoration of the initially empty value.

Title Selection

Reports that include a Title selection may or may not include all of the following selection criteria.

Format	All catalog records in the report are this record format, such as SERIAL, MARC, etc. Use the gadget to select formats. If no value is selected, all formats are included.
Date Created	All catalog records in the report were created or loaded into the catalog on this specified date. To select a range of dates, use the Date Range gadget. **NOTE:** This date does not correspond to the date in the fixed field that indicates when the record was created in the bibliographic utility.
Created By	All catalog records in the report were entered into the system by the specified user access. Use the String List gadget to enter a list of user accesses.

Date Cataloged	All bibliographic records were cataloged on this specified date. The Date Cataloged field in the catalog record defaults to NEVER for newly created titles, and can be changed manually or when more complete cataloging is loaded. To select a range of dates, use the Date Range gadget.
Date Modified	All bibliographic records were modified on this specified date. A modification includes any Edit or Create Item command at the catalog, call number, or copy level. A match and load bibliographic record or any record value modification report that affects the item will also update the Date Modified. Creating an associated record, such as a checkout or bill, will not change the Date Modified. To select a range of dates, use the Date Range gadget.
Modified By	All catalog records in the report were modified by the specified user accesses.
Publication Year	All titles in the report have the specified publication year. The publication year is from the DATE1 element of the 008 field, if present. If no date is found, then each tag in the format with a data entry type of publication date is checked. The first non-empty tag with a data entry type of publication date will be used for the publication date. To select a range of dates, use the Date Range gadget.
Number of Libraries	All titles in the report have holdings (at least one call number) in the specified number of libraries (as defined in the Library policy). To select a range of numbers, use the Number Range gadget.
Number of Call Numbers	All bibliographic records in the report have the specified number of call numbers. Titles created without copies for ordering or memos will still have a minimum of one call number. Each volume of a multiple volume set is considered an additional call number. To select a range of numbers, use the Number Range gadget.
Number of Title Holds	All titles in the report have the specified number of holds at the title level. To select a range of numbers, use the Number Range gadget.
Number of Total Holds	All titles in the report have had the specified number of holds, including those placed at the copy, call, title, and system levels. This is a total number of holds over the life of the title, not current holds. To select a range of numbers, use the Number Range gadget.
Shadowed	If Yes, all titles selected by the report are in the shadow catalog, which is searchable by staff only. If No, none of the titles selected by the report will be in the shadow catalog. By default in most reports both shadowed and nonshadowed materials are selected by the report. However, both do not display as the default selection. Its function is merely to allow the restoration of the initially empty value.

User Selections

The following User selections may be available.

Library	All users in the report are registered in the specific library or libraries. Use the gadget to select libraries. If no value is selected, all libraries are included.
User Profile	All users in the report have this User Profile policy value. Use the gadget to select User Profiles. If no value is selected, all users are included.
Grade Level	All users in the report have been designated to be of this category. Use the gadget to add or remove a Grade Level. If no value is selected, all Grade Levels policies are included.

	NOTE: This field is not required and is used for statistical purposes only. If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to test run the report without selecting on Grade Level to compare the accuracy of your results.
Job Title (not used by INFOhio at this time)	All users in the report have been designated to be of this category. Use the gadget to add or remove a Job Title. If no value is selected, all Job Title policies are included. **NOTE:** This field is not required and is used for statistical purposes only. If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to test run the report without selecting on Job Title to compare the accuracy of your results.
Department	All users in the report belong to this Department. To enter a list of departments, use the String List gadget. **NOTE:** This field is not required and is used for statistical purposes only. If your library does not apply this field consistently, or if all of the records have not been edited to include these statistical fields, you may wish to test run the report without selecting on Department to compare the accuracy of your results.
Address1 Entry	Users selected by this report will have the specified text in a specific field of the first address. To select a specific entry ID field and text, use the gadget.
Address2 Entry	Users selected by this report will have the specific text in a specific field of the second address. To select a specific entry and text, use the gadget.
Address3 Entry	Users selected by this report will have the specific text in a specific field of the third address. To select a specific entry and text, use the gadget.
Date Created	User records selected by this report were created on this specified date. To select a range of dates, use the Date Range gadget.
Privilege Granted	Each user record selected by this report was either created or had the privilege extended on this specified date. To select a range of dates, use the Date Range gadget.
Privilege Exp. Date	Users selected by this report are scheduled to have library privileges expire on this specified date. To select a range of dates, use the Date Range gadget.
Last Activity Date	User records selected by this report last had items checked out, checked in, renewed, a user billed, bill paid, user registered (the last activity date is updated to the date created), a hold placed, bookings charged or discharged, or an outreach interest searched on this specified date. To select a range of dates, use the Date Range gadget.

Title	User records selected by this report include this exact text in the Title: field. This one to four character field contains a user's title, such as Mr, Ms, or Dr, and is used primarily for addressing notices. Ending punctuation is automatically entered in the notice text and should not be included in the title field. To enter a list of titles, use the String List gadget.
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.
Delinquency Status	All users in the report are either OK, DELINQUENT, BLOCKED, or BARRED statuses. Use the Policy List gadget to add or remove a delinquency status. If no value is selected, all statuses are included.
Number of Checkouts	All users in the report currently have this number of items checked out. To select a range of numbers, use the Number Range gadget.
Number of Reserve Checkouts	This field is only useful for libraries that have the Academic Reserves module. All users in the report currently have this number of checkouts for items at the reserve desk. To select a range of numbers, use the Number Range gadget.
Number of Total Checkouts	Each user in the report has had this number of checkouts from the time the user was originally granted privileges. To select a range of numbers, use the Number Range gadget.
Number of Holds	All users in the report currently have this number of ACTIVE holds placed on items at either the copy, call, title, or system level. To select a range of numbers, use the Number Range gadget.
Number of Reserves	This field is only useful for libraries that have the Academic Reserves module. All users in the report are instructors who currently have this number of items on reserve for students. To select a range of numbers, use the Number Range gadget.
Number of Claims Returned	All users in the report have claimed to have returned items to the library this number of times since they have had privileges to use the library. To select a range of numbers, use the Number Range gadget.
Number of Bills	All users in the report have this number of outstanding bills, which are either not paid, or partially paid. To select a range of numbers, use the Number Range gadget.
Number of Total Bills	All users in the report have been billed this number of times since they have had privileges to use the library, or since the last Remove Bills, or Remove Paid Bills report affected the user record. To select a range of numbers, use the Number Range gadget.

Sorting Criteria Tab

This option is available in some reports, particularly lists and notices, when it may be beneficial to have various options for sorting report results. When making selections, you will have the option to use a verify list.

A report may list checkouts which can be sorted by call number, title/author, user ID, or user name. Results include copy information, user name, user ID, date checked out, date due, date renewed, number of renewals, number of overdue notices sent, the item's current status and the library.

Print Item, Print User or Output Options Tab

Based on available output options, the appearance and content of reports can vary significantly. Use selections along with output options to design a report to meet your needs.

Options in this phase of the report influence what information is included in the printed report results and in what format. Most report results default to include very general information, which may be expanded by making additional selections in the Output Options screen area.

In notice reports, the Output Options allow you to select from the appropriate notice texts that can print in the reports. Output options may vary between notices, and occasionally, a single output selection will be provided, such as "Notice File Name" or "Test Mailer Message."

Depending on the report and its goals, these Output Options may be available. When selecting output options, you may have the option to use a gadget to make selections based on lists or ranges, or a verify list to make a single selection.