Library Management System

OPENReports User Guide & Training Manual

Last Updated: 10 February 2016

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Australia: 1300 260 795 (Local call cost in Australia)
Email:
support-anz@oclc.org
Amlib Help Desk (TOPDesk):
https://oclc.topdesk.net/tas/public/login/form
OCLC Amlib Document Portal:
https://www.oclc.org/support/services/amlib.en.html

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TABLE OF CONTENTS

OVERVIEW

This manual provides a basic overview of the *OpenReports.*

- It is possible to design and run your own reports by using the **Entities** which are logical groupings of the Amlib tables and database areas and **Data Elements** which are the individual pieces of data used to create and define the reports content and display
- Reports to the **screen** or **exports as** a pdf, word or excel document
- They can be **scheduled** and sent as an email to recipient in several formats
- Charts can also be produced for some reports
- This new Reporting tool is Web based and connects directly to the database
- It enables you to quickly create and run numerous reports with ease

The Report designer presents the Amlib User with another option of presenting information from the Amlib database. It is not a replacement for the Report module or RepWin but an extra program to give you more options, in how you create and run your reports with Amlib.

There is a separate Installation Guide to assist in setting up OpenReports and is available from the OCLC Website/Amlib Documentation

Access OpenReports

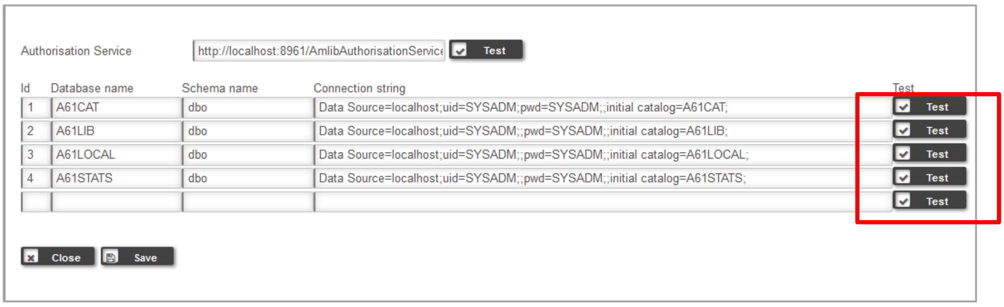
1. Open a browser and enter the following URL. Use you S*erver name* or Localhost and replace the **xx** as indicated with the port number you have assigned to OpenReports earlier:

   http://localhost:**XX**/Login.aspx OR http://servername:XX/Login.aspx

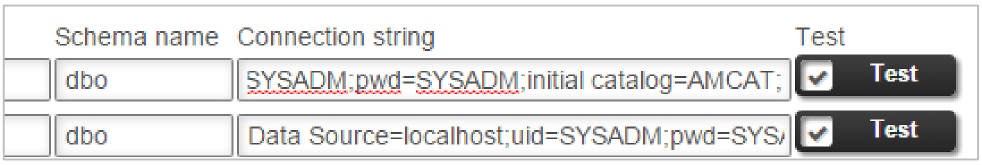
Change Connection Settings

This is required the first time you open OpenReports after it's been installed to select the database you wish to connect to. It is possible to view and alter the connections settings if required by selecting the **Change Connection** option at the top of the screen. For example change from the LIVE database to the TEST Database to run your reports from. **To view these settings**:

1. Select the **Change connection settings** and the database connection screen will display:

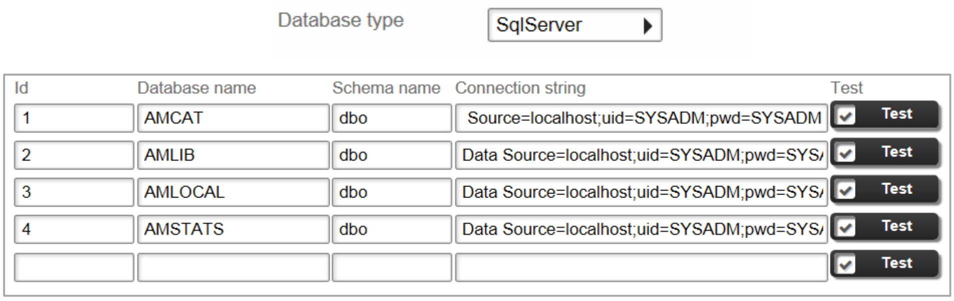


2. To the far right of the Connection string there is the **INITIAL CATALOG** which needs to be set when the program is first installed. Scroll to the right of each one, so that appropriate Database on each Database is changed – for example change the 1st line to be AMCAT, the second line to be AMLIB, the third line will be AMLOCAL and the fourth line will be AMSTATS



3. It can be tested to ensure its connecting correctly, by selecting the **Test** button

4. The Database type is selected from the Drop-down box , for example SqlServer:



5. Each Database connection string line reflects the database setup as required to connect:

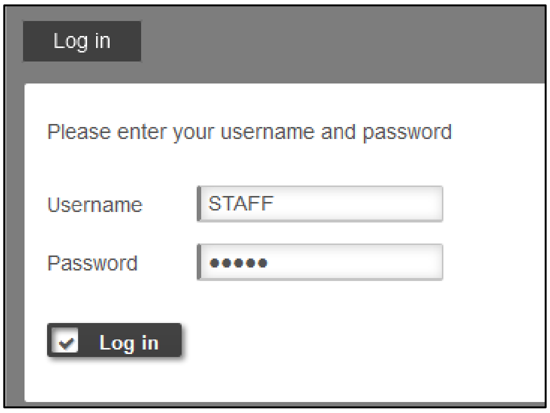
Explanation of what is required to be in the connection strings settings

Database connection column	**Information**	**Example**
ID	System ID : Leave as default	1
Database Name	The database names are entered in the fields. These can be altered to connect to the TEST databases if these are up to date	AMCAT, AMLIB, AMLOCAL, AMSTATS TECAT, TELIB, TELOCAL, TESTATS
Schema Name	Schema Name : Leave as default	dbo
Connection String	Made up of Datasource (Servername) , Database User Name and Password	Data Source=localhost;uid=SYSADM;pwd=SYSADM
	Data source is the Hostname	Localhost or Computer Name
	Uid: Username ID for the database connection	SYSADM
	Pwd: Password for the database connection	SYSADM
Test	Select **Test** to check the connection is working	*"Connected successfully to the database"* *"Error while connecting to the database: Login failed for user 'SYSADM'"*

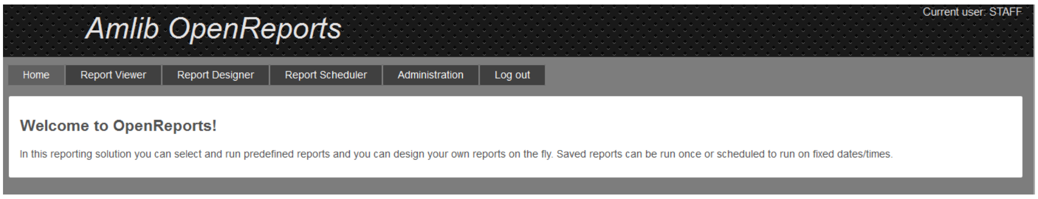
LOGIN

OpenReports uses a valid login as found in the Amlib system – check Supervisor>Installation>UserPermissions for a list of valid Users within Amlib. Once logged in it is possible to set up a range of reports which are then available to other Users within Amlib, unless the "Private" setting has been used to keep them only available to a certain login.

1. Login to OpenReports



2. Enter your **Amlib User Name**
3. Enter your **Amlib Password**
4. Click the **Log in** button
5. The Open Reports window will open with the Home and Version TABs displaying



Log out

1. Click on the [Log out] hyperlink on the Welcome page
2. You will be returned to the Log in page where a Log in can be done, or close the page to exit

Home

In this reporting solution you can select and run predefined reports and you can design your own reports on the fly. Saved reports can be run once or scheduled to run at fixed dates/times

Report Viewer

View and run existing reports to a variety of formats. Because this is not available until reports are designed, the Guide begins with the Report Designer.

Report Designer

Design reports using Amlib Tables to create reports, producing results from the Database. Allows the designer to use Data Fields within Entities to select for Display Fields, Group Fields, Filters and Order sequence to design reports on the fly. This will be the first section within the Guide

Report Scheduler

Schedule reports to run at set date and time

Administration

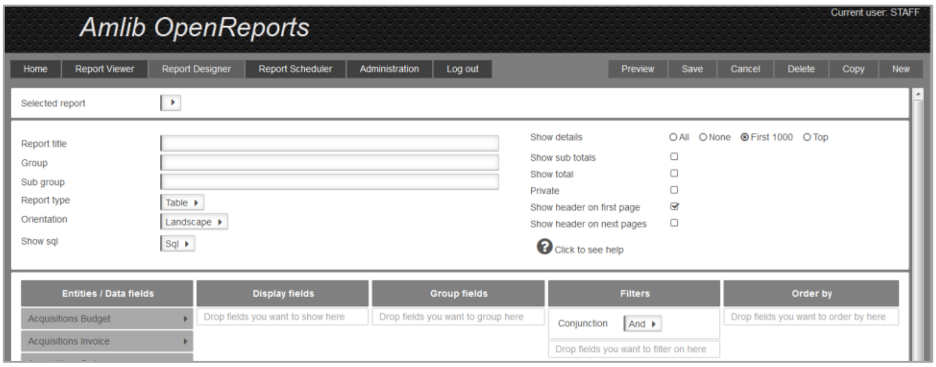
Set up defaults to apply to OpenReports

This includes:

- Header settings
- Reset of session
- Logo upload
- SMTP settings for Email
- Log Levels

See detailed information further on in the Guide

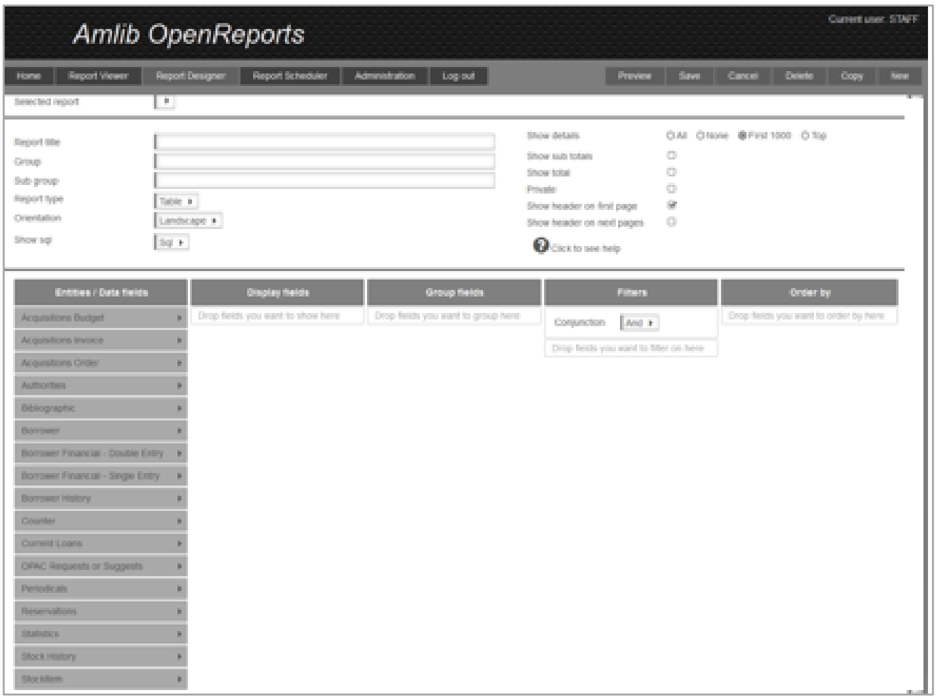
REPORT DESIGNER



Report Designer enables reports to be created and later viewed via **Report Viewer**.

Choose:

- Entity
- Data Fields
- Display Fields
- Group Fields
- Filters
- Order By

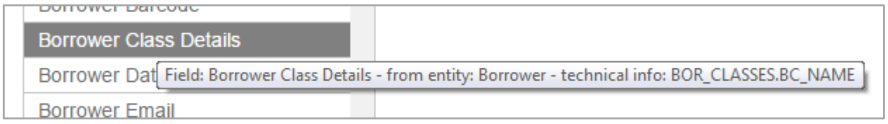


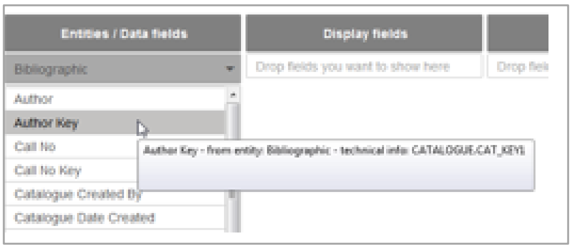
The Entities and subsequent Groups and Subgroups form a Hierarchy within the Report Viewer and Report Designer that can expand out or collapse as required, to find the report easily next time

Entities/ Data Fields

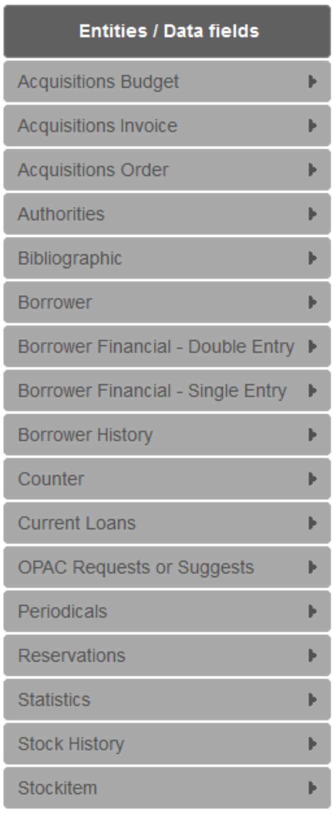
- Entities contain Data Fields/Elements
- As the Entities contain Data Fields that link to other Entities it is often possible to combine Data Fields from a variety of Entities
- For example, for an Overdue Report it is possible to Display Data Fields from the Stockitem and Data Fields from the Borrower Entity as these are linked for the loans
- In the same way, Reservation Reports often involve the Stockitem and Borrower entities as well as the Reservation entities
- As Entities are selected, other Entities either stay highlighted or fade out depending on whether it is possible to link the Data Fields or not
- Whilst it is possible to get a wide combination of Data Fields it is important to try and be logical in what is selected. Not all combinations will work together

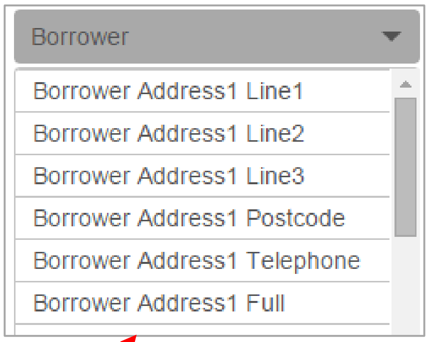
- Tool tips exist in the **Design Area** (hover over the selected **Data Fields** to see the Database name/table) to help you select the correct data fields for your report





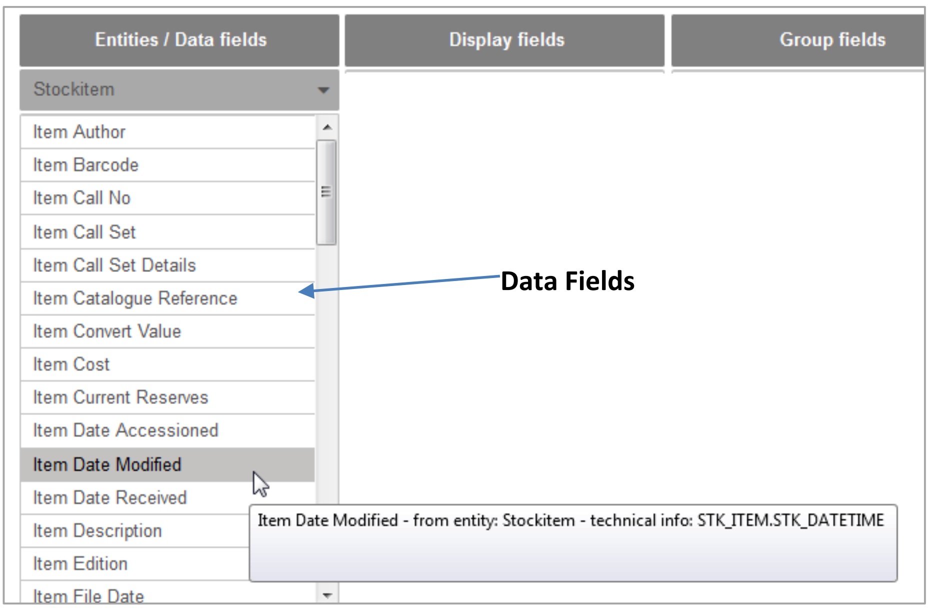
There are 17 entities available within Report Designer:





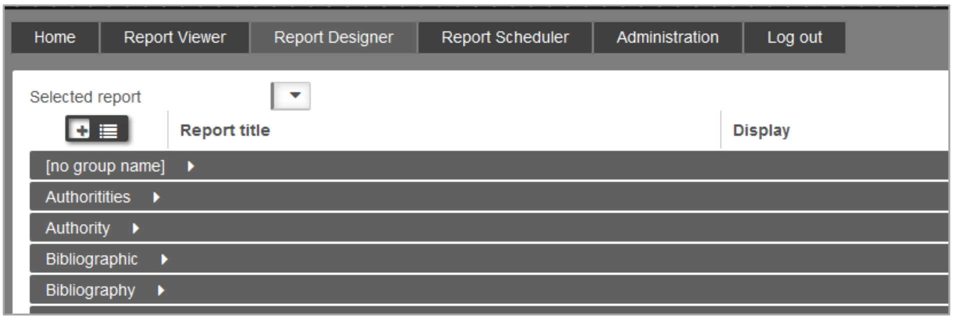
Data Fields

1. Each Entity has Data Fields used to make up the report
2. Some of these will be code entries, some will be the description
3. Tool tips exist in the design area (hover over the selected Data Fields to see the Database name)

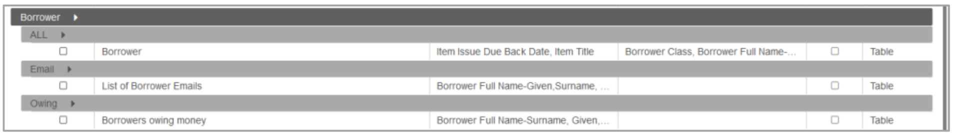


TO VIEW AN EXISTING REPORT IN REPORT DESIGNER

1. Access OpenReports
2. Select Report Designer
3. Select the Drop-down within Selected Reports



4. Drill down or Select the + Button  toggle between expand/collapse all Group names to find the report required



5. Ticking the box will display the current Display Fields and Filters so that the Report can be Previewed using the options at the top of the Window

TO CREATE A NEW REPORT

Plan the Report

Think about and plan the report

- What Data is required?
- Is it to be a Table or a chart? Start with Table reports and experiment with charts later
- What elements will be needed within the display? Is the report to be grouped – with a Page break or Continuous?
- Would Portrait or Landscape be more suitable? Start with landscape and experiment later
- Does it need scheduling?

Having some ideas of the layout will assist when using the Report Designer

Start simply and build from there

- Start with a basic, simple report to get used to the Drag and Drop approach
- Use the **Preview** to see how you are going!
- Select **Data Fields** from **Entities for Display** and **Preview** to check what you have
- You can keep coming back to refine it with **Groups**, **Filters** and **Order** options later

Building blocks to Design – essential steps

1. Select **New** from the buttons of the *Report Designer*
2. Enter the **Report Title** in the <u>Edit Report</u> Window
3. Enter a **Group** to store the report and make it easier to find
4. Open the **First Entity** to select the **Display Fields**
5. **Drag** and **drop** the **Fields** to **Display, Group, Filter and/or Order**
6. Enter a **Filter** if certain data only is required back from the database
7. **Preview** to see how it looks
8. **Save** the Report to make it available in Report Viewer, Report Scheduler or Report Designer

It can then be refined to suit if required

OPENREPORTS – OVERVIEW OF STEPS FOR A NEW REPORT

NEW REPORT

- Select **New** from the Buttons in Report Designer

⬇

EDIT REPORT

- Enter the **Title** of the Report
- Enter a **Group** to categorize the report within the Index
- Other options as required

⬇

ENTITIES/DATA FIELDS

- Open the required **Entity**
- Select the Data Fields as required

⬇

DISPLAY FIELDS

- **Drag** and **drop** the **Fields** to **Display**
- Alter the Headings or Format by right clicking on the Field

⬇

GROUP FIELDS

- **Drag** and **drop** the relevant Fields to Group.
- Often avoids having repeating values within the Display

⬇

FILTERS

- Can be left blank to deliver **All** in relation to display fields
    - **Drag** and **drop** the relevant Field/s to Filter
- Select the Operation as required to pinpoint the Data

⬇

ORDER BY

- **Drag** and **drop** the relevant Field/s as an Order to sequence the report if required. It is logical to only Sort by a Data field already used as a Display Field OR a Group Field

⬇

PREVIEW

- Select the **Preview** button at any time to see how the report looks
- Click the **Back** button to return to the Designer

⬇

SAVE

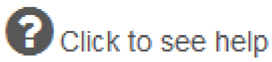
- **Save** if it is complete or refine further
- The Report will then be available from the **Report viewer**

ELEMENTS TO CREATING A REPORT

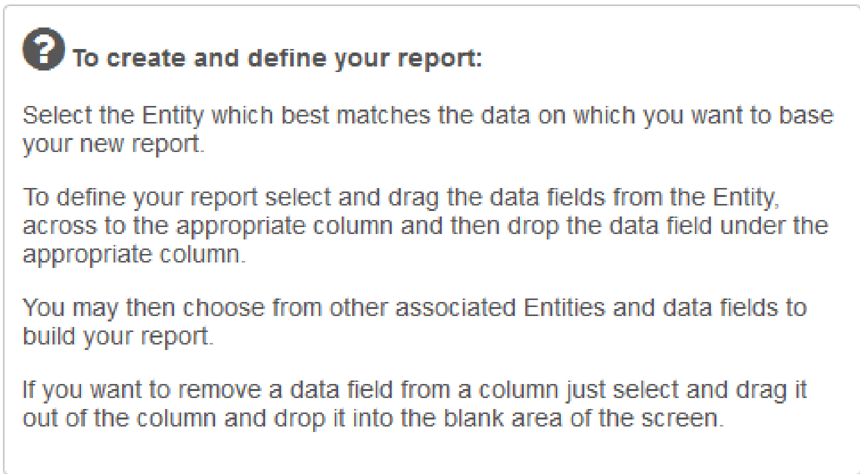
In the samples that lay ahead to try out there are some basic tips and rules to follow for success

Help

On each Edit section there is some Text to assist with the basic procedure for creating a report



Once Selected the Help Text appears


To create and define your report:

Select the Entity which best matches the data on which you want to base your new report.

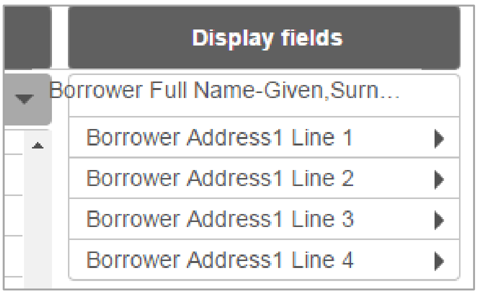
To define your report select and drag the data fields from the Entity, across to the appropriate column and then drop the data field under the appropriate column.

You may then choose from other associated Entities and data fields to build your report.

If you want to remove a data field from a column just select and drag it out of the column and drop it into the blank area of the screen.

Drag and Drop

1. Open an Entity to view the Data Fields
2. Select a Data Field by Selecting and **dragging** to the required column
3. Drop it in. If other Data Field/s are already present, it can be dropped in at a certain level



Delete a Data Field

If the wrong **Data Field** is brought across, simply drag the Field into white space and "let it go" to delete it from any Column where it is no longer required

It is not possible to **drag *across*** Columns. If a Data Field is to be taken from one column and added to another, drop that Data Field out and reselect it from the Entities/Data Fields Column to bring it into the correct column

EDIT REPORT

Buttons

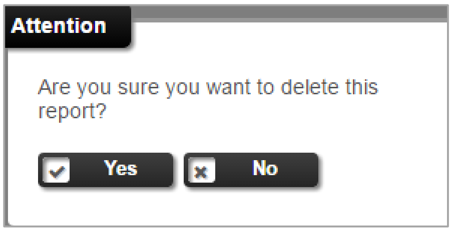
The buttons at the top right hand corner are used within the Edit Report window

Preview: View a new or a saved report

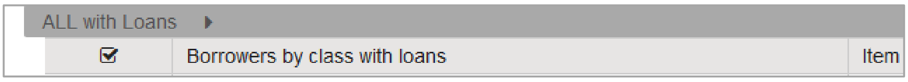
Save: Save a new or changes to a previously saved report. This allows the report to be viewed via Report Viewer. A confirmation message will display when the Report is saved

Cancel: Undo any changes made and revert back to the previous saved version

Delete: Delete a previously saved report. A confirmation message will display. Answer Yes if the report is to be deleted



Copy: Tick the report to Copy.



Select the Button Copy and the report will be copied within the Report main group with the word “COPY” added to the Title. All the existing Edit, Display and Group Fields, Filters and Order by will be from the original report will be displayed

The Title can then be changed and the other elements of the report altered as required. When complete, save the changes

New: As soon as New is selected a blank Report window will display ready for the details to be entered

Enter Details in Report Window

Report Title: Every Report must have a Title. It is used to store the report and becomes the Heading for the report when it is displayed, either just on the first page or for every page as set, as part of the Header

Group: Enables the Reports to be grouped logically together so that the report can be found easier in Report Viewer and Designer. Every Report must have a Group. Eventually there will be many Categories or Groups that contain subsets of Reports

Sub Group: Enables the report to be grouped by a secondary classification

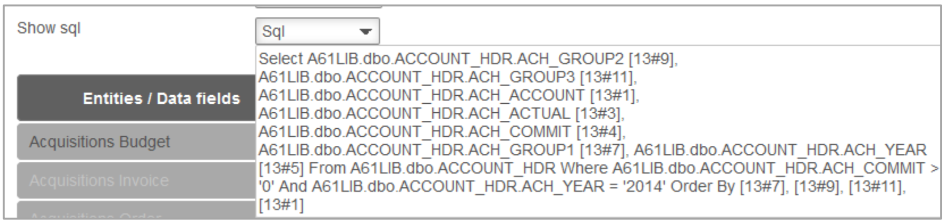
Report Type: Selected from the Drop-down options (Table is default):

- Table – set out in rows and columns (select for the sample)
- Chart – if set to chart there are many options in relation to what sort of chart is preferred

Orientation: Selected from the Drop-down options

- Landscape (Default)
- Portrait

Show SQL: Enables a view of the SQL written behind the scenes to generate the report. This would not often be viewed, but could become useful in trouble-shooting situations

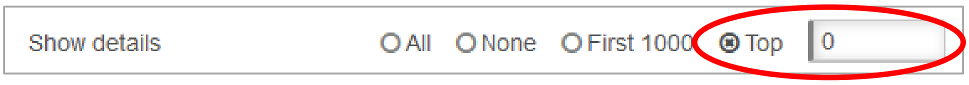


Show details: Default is first 1000

- **All**: Shows the break-down of details within the Fields

- **None**: Shows the numbers for the results but not the details within the Report. Fields will be hidden. It could be useful when only the Counts and Totals are required. This will be discussed later in the Guide in respect to getting Totals for Statistics reports etc.

- **First 1000**: Shows the first 1000 records only (Default)



- **Top**: Once Top is selected, a box will display where the top number required can be entered. For example the Top 5. The Guide will give more information and samples for getting Top read items or Top Borrowers etc.. Set the Top value of detail records (for example: if you group by a field, and want to restrict the details to the best/highest 5) use the Counter Entity and Group Details Count.

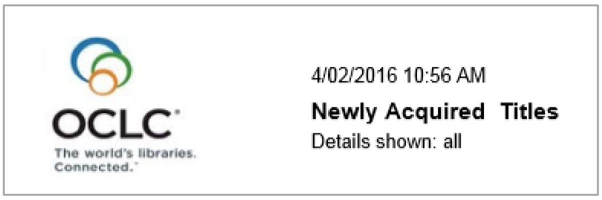
  For example, the **Top** Borrowers of the Year Group:

Show Sub totals: For simple counts or if a calculation based on Groups is required (Default is unticked).

Show total: For a Total calculation of the Sub totals is required (Default is unticked).

Private: To enable the report to be only to be available under your Login (Default is unticked).

Show header on first page: Header, Date and Time, Details selected (and *your* Logo if using) are viewed on the first page only



Show header on next pages: Header, Date and Time, Details selected (and *your* Logo if using) are viewed on all pages of the report

DISPLAY FIELDS

Drag and drop the required Data Fields to the Display Column. Order of the Columns of the Report

The Order in which the Fields are listed, give the order in which the Fields are displayed. They can be manipulated up and down the Table under Display Fields until you get the order correctly placed

Once the Field is in the list, it is possible to alter the display by Selecting once on the Data Field Heading it can be altered for:

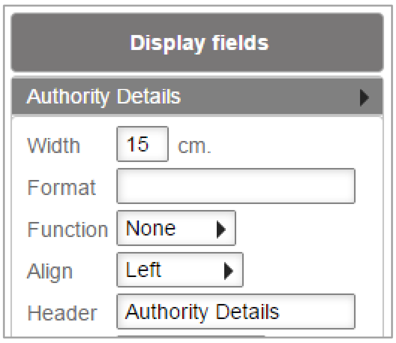
- Width
- Format
- Function
- Align
- Header

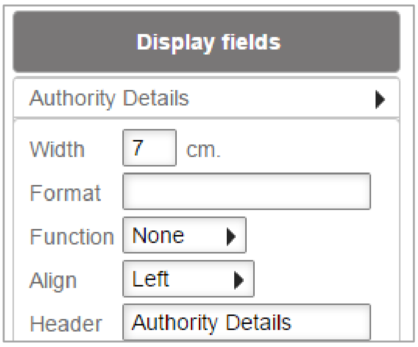
Select the Display Field and the Display Fields options will display

Width

Alter the Width to make the display smaller or larger for any particular Field. This is particularly useful when the columns are too wide in the original report or there is unnecessary wrapping because the columns are too narrow

For example alter the Width or the Authority Details from 15cms to just 7cms





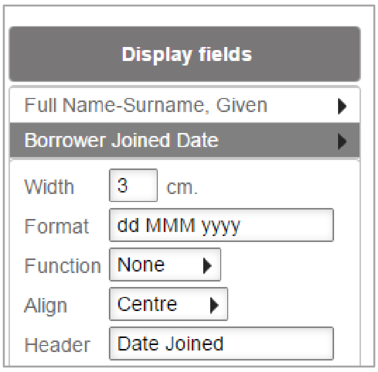
Authority Details	Tag No
Stoner, Casey.	600
Sauces.	650
Science.	650
Spiders	650
Spain - Civilization - 20th century.	651
Spain - Description and travel.	651

Format

This is usually altered to change the Standard format of a Date or Currency Field. Most Default to a standard.

Date and Time Fields

Usually have the default set as dd MM yyyy, but is possible to alter to a different standard format. For example, change the Date format from the default to be dd MMM yyyy.



Full Name-Surname, Given	Date Joined	Borrower Type
Amato, Steve	14 Jan 2014	Y07
Dimovski, Denziell	14 Jan 2014	Y08

Note: If the Format is changed, it may be necessary to alter the Width to display the new format correctly

In the sample below, the Format was altered, but the width was kept to 2cms and this eventuated in the wrapping of the date, which looks much better at 3cms as above

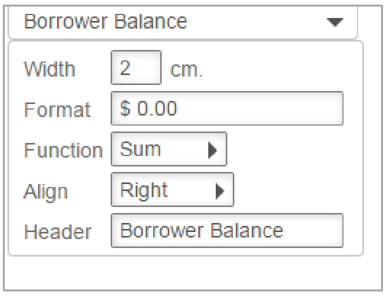
Class	Surname	Given Name	Joined Date	Bor Type
2A	Arnold	Hannah	11 Feb 2013	J

Note: Many of the Format possibilities are in the Appendix 1

Currency

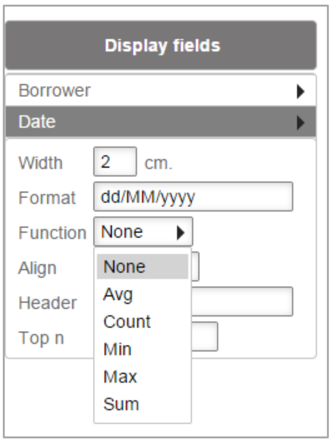
The standard is set as 0.00

If the $ symbol is to be added it can be entered as $ <space> 0.00 to enable the listing to include the dollar sign. However if calculations are needed within the Filter, the Data Field should remain as 0.00



Functions

It is possible to change the Function of a Number Field:



None

Default Function which usually applies to all Text Data Fields

Average

Useful when getting the Average calculation on Data Fields. Only applicable for numeric fields

Count

Useful for getting simple counts where the Subtotals and Totals apply

Minimum

Calculates the Minimum value of numeric fields. For example Minimum Cost of an Item to find the lowest value

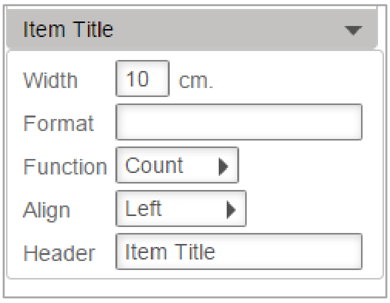
Maximum

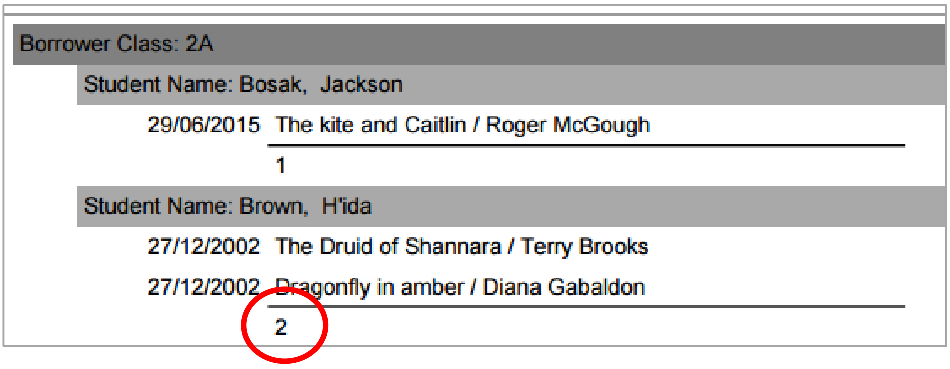
Calculates the Maximum value of numeric fields. For example Maximum Cost of an item to find the highest value

Sum

Default Value for numeric fields so that when the Subtotals and Total are added, it calculates correctly. However, it may sometimes may need to be substituted for a Count. For example if you wish to add the number of items a count of Items with Barcodes can be done. If a sum applied to this Function then all the values of the Barcodes will be added rather than a simple calculation to count how many.

For example: Count on a number of Titles Overdue grouped by Borrower Class and Borrower Name





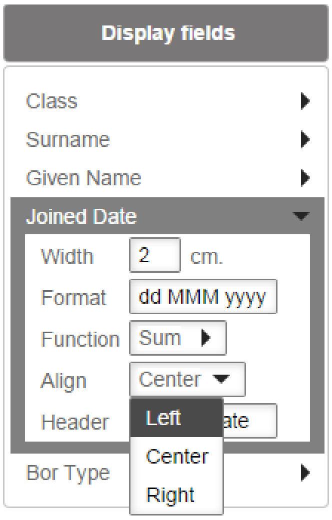
Align

There is a default alignment for most Fields

- Text: Left aligned
- Dates: Centre aligned
- Numbers including Money: Right aligned

The alignment can be altered to alter the Display

For example: Make a date **Left** aligned

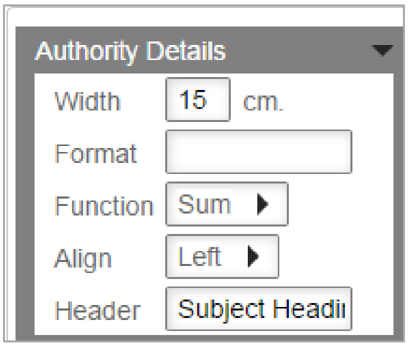


Class	Surname	Given Name	Joined Date	Bor Type
2A	Arnold	Hannah	11 Feb 2013	J
2A	Arthur	Brooke	11 Feb 2013	J
2B	Attrill	Sarah	11 Feb 2013	J
3A	Kenshole	Megan	11 Feb 2013	J
3B	Alberts	Nick	11 Feb 2013	J
5A	Ansell	Nick	11 Feb 2013	J
7A	Gabbe	Jade	11 Feb 2013	SE
7B	Ashworth	Tate	11 Feb 2013	SE
8B	Smith	John	03 May 2011	J
HB01	Aggett	Rachelle	11 Feb 2013	SE

Header

It is possible to alter the Report Header to a Heading that makes the report easier to understand or to shorten it to prevent it wrapping. The Heading saves for this report and will keep the new heading when being viewed within the Report Viewer and when it is sent via the Report Scheduler

For example – If in the Report Designer only the Subject Heading are selected, it is possible to alter the heading from Authority Details to Subject Headings for just this report



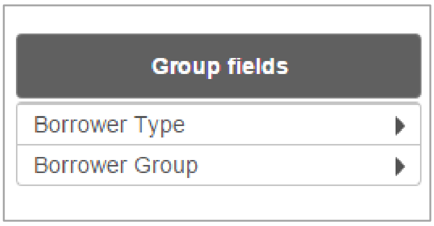
The Heading is customised to suit the layout of the Report

Tag No	Subject Heading	Tag No
600		
	Stoner, Casey.	600
650		
	Science.	650
	Sauces.	650
	Arts.	650
	Western Australia, Pictorial works.	650
	Australia-Kimberley	650
	Western Australia	650

GROUP FIELDS

Group fields are used to split the display up by a chosen Field. It also can be used to prevent Duplicate Data field entries to be repeated. The Groups are highlighted by using a shade of colour over the Text.

For example, new Borrowers for a time period, grouped by Borrower Type and then by Borrower Group



It displays with the Students categorised and highlighted by the first grouping in a dark colour, then with the second grouping in a slightly lighter shade

Borrower Full Name-Given,Surname	Borrower Date Of Birth
Borrower Type: Y09	
Borrower Group: AUDIT	
Judea Anset	04/12/1999
Borrower Group: CHI	
Haylee Gardner	30/05/2000
Ebony Wong	13/12/1999
Laura Walsh	04/04/2000
Kazi La-Rue	01/10/2000
Borrower Group: CRO	
Callum Inkster	14/08/1999
Dylan Ball	11/06/2000

If the students are listed without splitting them into Group Fields, the Borrower Type and Group repeat which may be fine and takes up less space. It is a matter of choice how to display the names and whether to Group or not…

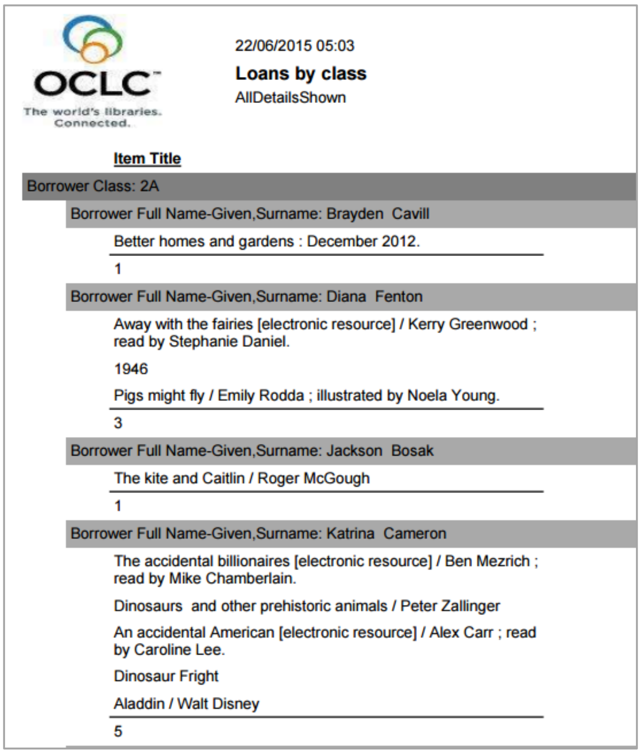
Judea Anset	04/12/1999	Y09	AUDIT
Haylee Gardner	30/05/2000	Y09	CHI
Ebony Wong	13/12/1999	Y09	CHI
Laura Walsh	04/04/2000	Y09	CHI
Kazi La-Rue	01/10/2000	Y09	CHI
Callum Inkster	14/08/1999	Y09	CRO
Dylan Ball	11/06/2000	Y09	CRO
Alyssa Henderson	10/11/1999	Y09	DUT

Grouping and Subtotals

Groups should be used when the report needs Subtotals and Totals so that the correct maths is done.

For example: Loans by Group or Class to get totals for each individual and a Total for each Class for the current loans

Note: when the box for **Show Sub Totals** and **Show Totals** are ticked, it's because the report is using a **Filter** for the Totals:


22/06/2015 05:03
Loans by class
AllDetailsShown

Item Title

Borrower Class: 2A

Borrower Full Name-Given,Surname: Brayden Cavill

Better homes and gardens : December 2012.

1

Borrower Full Name-Given,Surname: Diana Fenton

Away with the fairies [electronic resource] / Kerry Greenwood ; read by Stephanie Daniel.

1946

Pigs might fly / Emily Rodda ; illustrated by Noela Young.

3

Borrower Full Name-Given,Surname: Jackson Bosak

The kite and Caitlin / Roger McGough

1

Borrower Full Name-Given,Surname: Katrina Cameron

The accidental billionaires [electronic resource] / Ben Mezrich ; read by Mike Chamberlain.

Dinosaurs and other prehistoric animals / Peter Zallinger

An accidental American [electronic resource] / Alex Carr ; read by Caroline Lee.

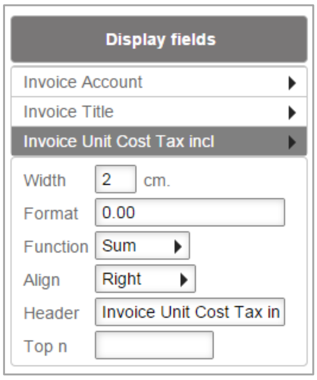
Dinosaur Fright

Aladdin / Walt Disney

5

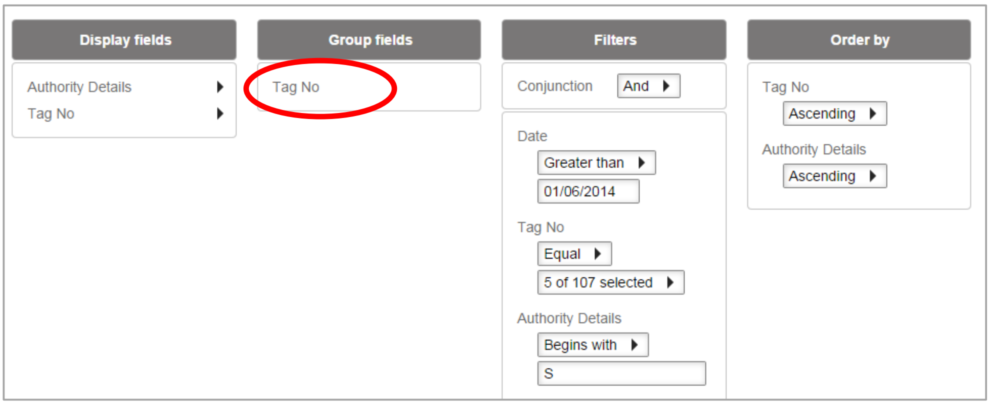
For Numeric **Totals** it is usually important to have the **Function** set to **Sum,** so that the Subtotals and Totals create the Math for the Totals and Subtotals.

Ensure the **Sum** is selected for the Display



To split the display up by a chosen Field.

For example, new Subject Headings for a time period, split up by Marc Tags



This results in the report having the Subjects split by Marc Tags. With the **Group** defined as Marc Tag, you could leave out the Tag No in the display.

Tag No	Authority Details	Tag No
600		
	Stoner, Casey.	600
650		
	Sauces.	650
	Science.	650
	Spiders	650
651		
	Spain - Civilization - 20th century.	651
	Spain - Description and travel.	651

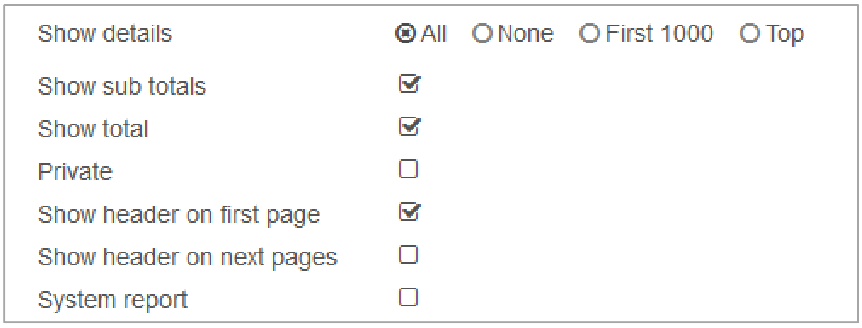
Without the Group of Marc Tags set, the Report displays as follows:

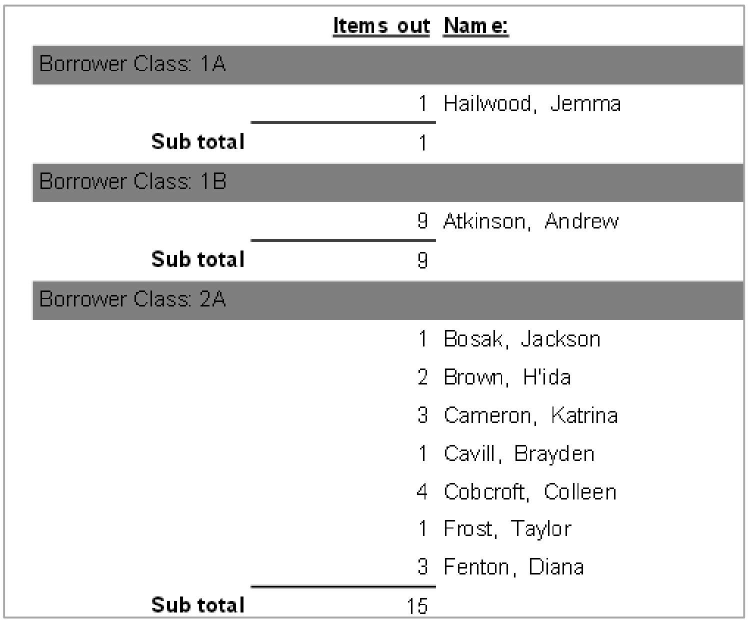
Authority Details	Tag No
Stoner, Casey.	600
Sauces.	650
Science.	650
Spiders	650
Spain - Civilization - 20th century.	651
Spain - Description and travel.	651

Group Fields should be used when the report needs Subtotals and Totals so that the correct maths is done.

For example: **Loans by Class** to get totals for each Class of the loans over a certain period:

Note that the Box for Show Sub Totals and Show Totals is ticked. Because the report has a Filter this is used for the Totals:

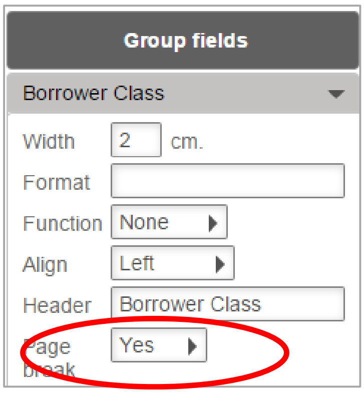




Page Break

Allows the inclusion of a Page Break for each Group if required. Select on the Group Field to view the Format options. Page Break will be an option when selected as a Group Field

For example the overdues of a Class on each page



FILTERS

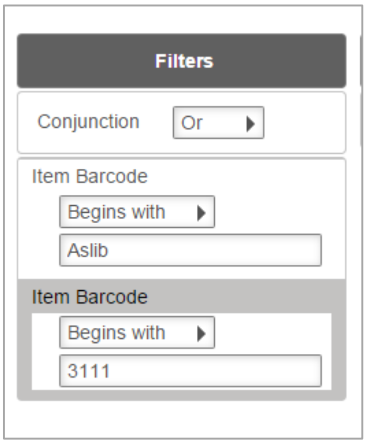
It is not necessary to define a Filter for all reports. If there is No filter the report will return ALL data depending on the Display Fields and Entities chosen.

For example report on **ALL** circulation data for the Display Fields of Borrower Barcode and Item Title

Report on the Cost of **ALL** items

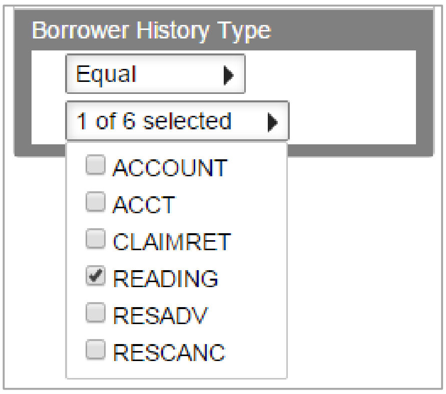
However it can be very useful to define Filters to narrow down the Search – for example, only report on those Loans overdue for more than 3 months, within a Date Range, only Students etc.

1. From the **Entities / Data Fields** selection list the Entity – for example Borrower
2. Highlight the Field from the Table and Drag and drop into the Filter Table to show how the data will be filtered for display
3. Set the Conjunction to Or if necessary (it defaults to And)



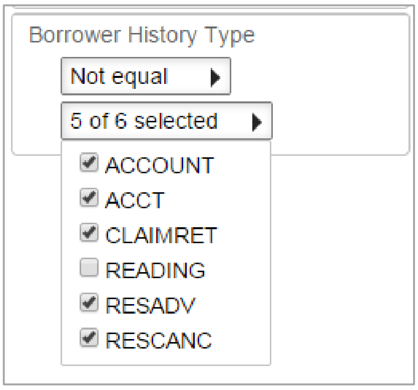
Depending on the Filter choice and whether it is a String, Text, Code List or Date Field, the Operation can be one of the following:

EQUAL: should only be chosen if it's against coded fields when you know EXACTLY what you want. Often the codes chosen for the Filter display as a Checkbox. For example Borrower History Type EQUAL to READING

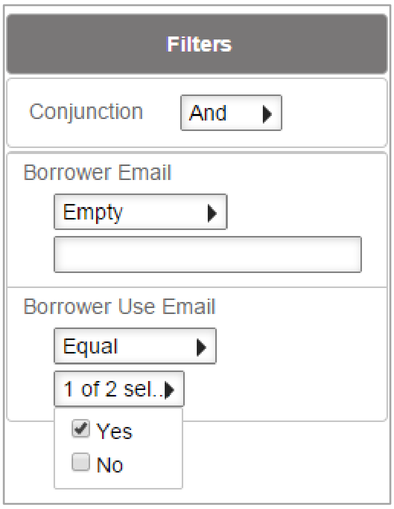


Equal is not often used for dates or free text fields as no results will be returned if it does not find an *EXACT* match with the whole field or date (there may be time stamps included in the Date field)

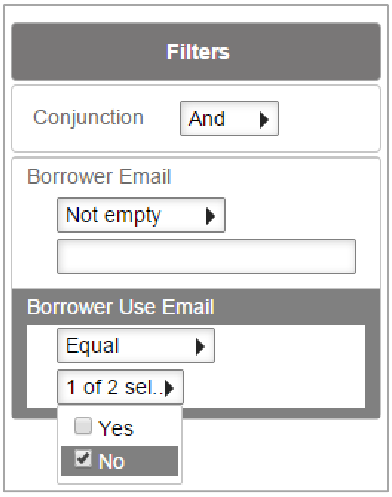
NOT EQUAL TO: should only be chosen if it's against coded fields when you know EXACTLY which codes you do not want. Often the codes chosen for the Filter display as a Checkbox. For example Borrower History Type EQUAL to READING



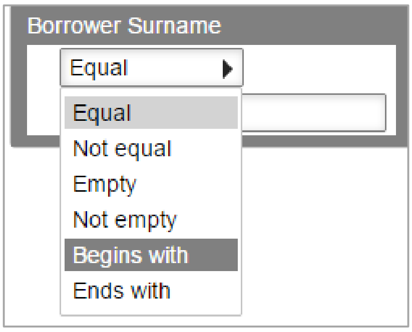
EMPTY: To report on situations where a field or code is null. For example finding all Borrowers that have not been allocated an Email Address but have the Borrower Use Email set to Y



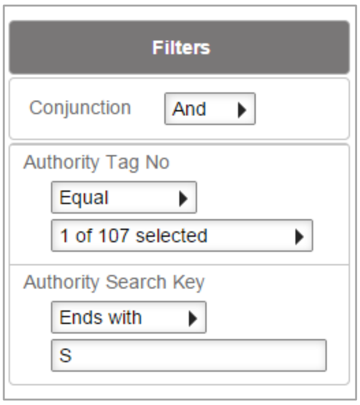
NOT EMPTY: To report on situations where a field or code is NOT null. For example finding all Borrowers who have an Email account and the Borrower Use Email is set to N



BEGINS WITH: Used when choosing free text into a field as a filter. For example, Surname begins with A



ENDS WITH: Used when choosing free text into a field as a filter. For example, Search Key ends with S



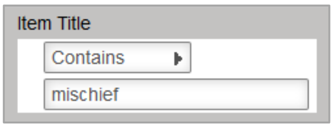
GREATER THAN: Useful for Number or Letter fields, Money Values and Dates. Filter by more than the number, date or letter entered

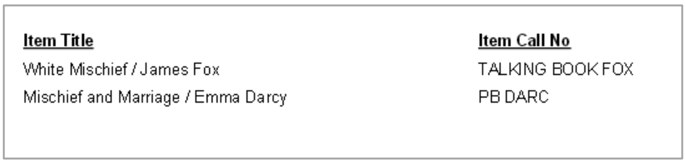
GREATER THAN OR EQUAL TO: Useful for Number of Letter fields, Money Values and Dates. Filter by more as well as equal to the number, date or letter entered

LESS THAN: Useful for Number fields and Dates. Filter by less than the number, date or letter entered

LESS THAN OR EQUAL TO: Useful for Number fields and Dates. Filter by less as well as equal to the number, date or letter entered

CONTAINS: The term entered is found anywhere within the Data Field. For example Title *contains* mischief to find that term anywhere in the Title

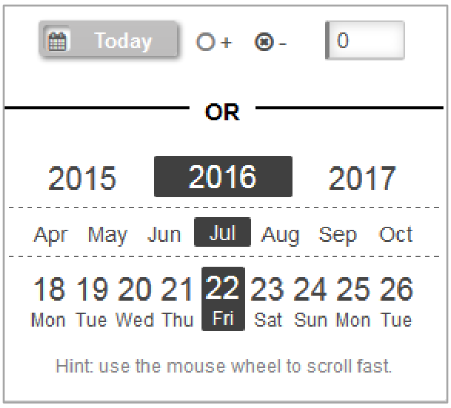




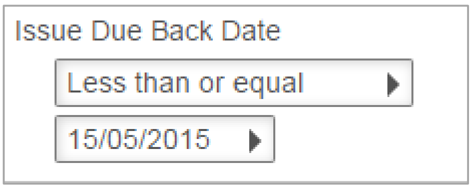
USING THE CALENDAR TO SPECIFY A DATE

To select a specific date:

1. Select the **Year** – Default is the current year but use either:
    a. Select once to the left (decreasing) or right (increasing) to get the next Year as appropriate for example, Select left once of 2014 to display 2013 and again to display 2012 etc.
    b. Use the Mouse Wheel to scroll to an earlier Year by winding down or winding up to get years in the future
2. Select the **Month** – Default is the current Month but use either:
    a. Select once to the left (decreasing) or right (increasing) to get the next Month for example, Select to the left of June to display May and again to display April etc.
    b. Use the Mouse Wheel to scroll to an earlier Month by winding down or winding up to get years in the future
3. Select the **Day** - Default is the current day but use either:
    a. Select once to the left (decreasing) or right (increasing) to get the next Day as appropriate for example, if displaying 15, Select to the left once to display 14 and again to display 13 etc.
    b. Use the Mouse Wheel to scroll to earlier days by winding down or winding up to get years in the future
4. Once the Date is correct, *Select out* of the box into the blank space



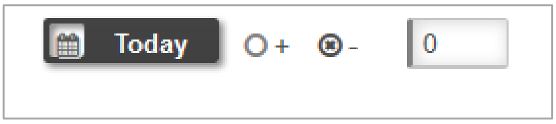
5. The actual Date selected will appear in the relevant Date Field and used within the Filter



Using the Today Function

The Today Function is very useful when setting an overdue report when you wish each week to find all those items overdue by a number of days for example, 14 days overdue. A date does not have to be entered each time!

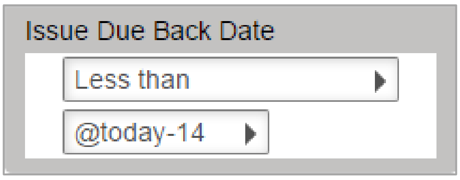
1. Select either minus or plus (Default is minus)



2. Enter the relevant **days** as a number (Default is 0)

   For example, enter 14 for 2 weeks prior

3. Select **Today**
4. The Date calculation will display in the Date Field and used in the Filter

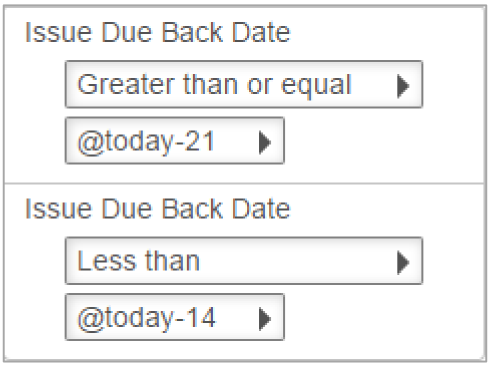


Note: If the Date calculation does not appear in the field, the Today button has not been selected. Ensure the calculation appears before Selecting outside of the box

Range of Dates

It is possible to get a range of dates using the actual Dates or the Today function

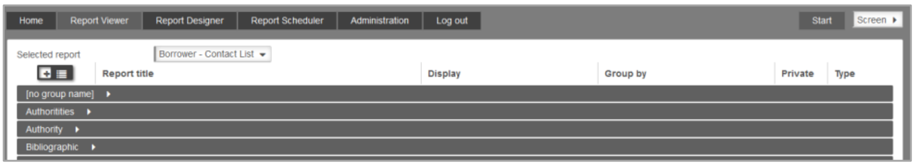
For example, to calculate the Issue Due Back within the date range for 14 and 21 days overdue, based on the current dates calculation enter the following:



REPORT VIEWER

The Report Viewer enables the selection and viewing of reports. These are available to run and get immediate results without having to set up any further configuration within the Filters etc.

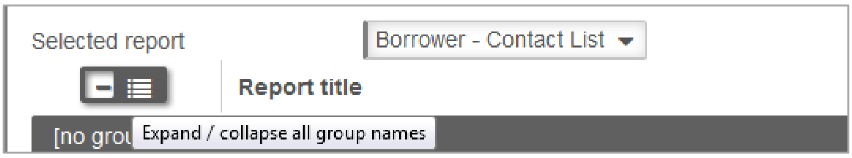
There may need to be some setup on the Browser as to what path to find for the Excel, Word applications.

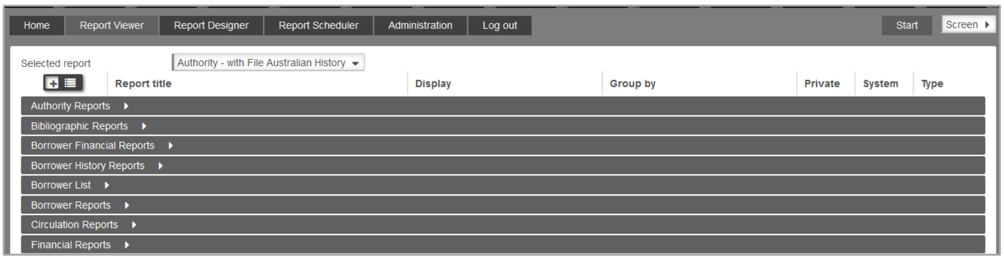


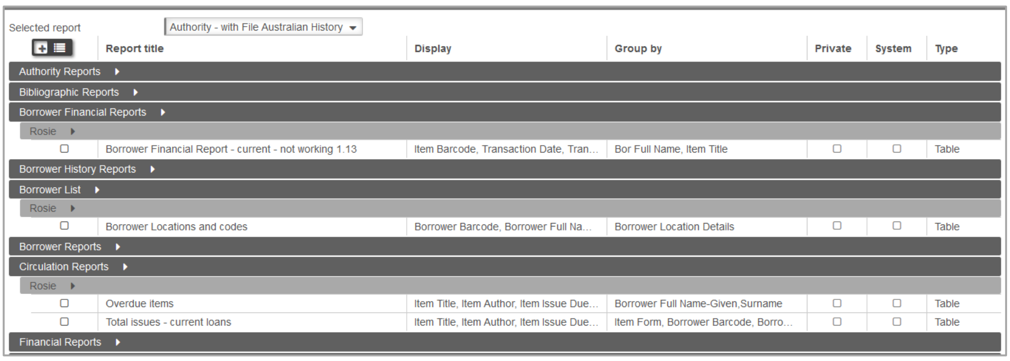
This screen lists all the Reports split by Category. It has a Start and View options to the top right:

Selected Reports

1. The Reports can be grouped. In order to see all the Groups and relevant reports for each group, select the **+ button** in the top left hand corner of the screen. This button toggles between viewing just the Groups or viewing the contents for each Group



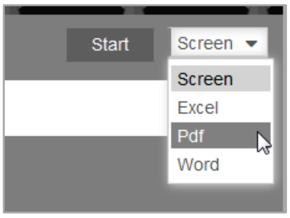




2. In order to see just the **Groups** Select the button again

3. With the Report hierarchy displayed, highlight the **Report line** to select the Report. The **Checkbox** will be ticked once selected.

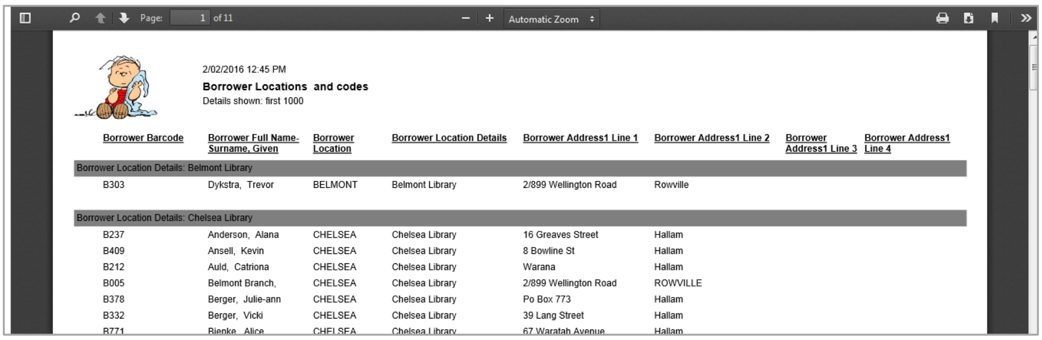
Select Report – Report Viewer



1. Select the Output. The options currently are:
    - Screen
    - Excel
    - Pdf
    - Word
2. Select the **Start** button
3. The report will display depending on the Output. If on the Screen, the display will show within the **View** report section
4. The display will show automatically in either:

Screen

PDF



Excel

	A	B	C	D	E
1	**Item Form**	**Item Barcode**	**Item Title**	**Item Author**	**Item Cost**
2	BK	980103463	Cricket / [by] Barry Richards.	Richards, Barry, 1945-	20.00
3	BK	980113901	Cricket : the men and the game / [by] Tony Greig as told to David Lord ; photographs by Ken Kelly an	Greig, Tony, 1946-	30.00
4	BK	980114031	The art of fast bowling / [by] Dennis Lillee.	Lillee, Dennis, 1949-	30.00
5	BK	980103412	Greg Chappell's Cricket clinic / edited by Jim Main ; photographs by Roger Gould.	Chappell, Greg, 1948-	20.00
6	BK	980170746	The gloves of irony / Rod Marsh.	Marsh, Rod, 1947-	30.00
7	BK	980114154	The ABC of cricket : the history, the laws, a glossary of terms / Ian Brayshaw.	Brayshaw, Ian, 1942-	30.00
8	BK	980160097	Cricket my way / Ian Botham with Jack Bannister.	Botham, Ian, 1955-	30.00
9	BK	980114200	Farewell to cricket / Don Bradman ; introduction by David Frith.	Bradman, Donald, Sir, 1908	30.00
10	BK	980163079	The name of the game is- cricket / David Emerson ; illustrated by Christine Burke.	Emerson, David.	20.00
11	BK	980114082	Cricket alive : World Series Cricket, the first exciting year / photography by Vivian Jenkins; intro	Jenkins, Vivian,	30.00
12	BK	980172469	Ball by ball : the story of cricket broadcasting / Christopher Martin-Jenkins.	Martin-Jenkins, Christopher,	30.00
13	BK	980201194	McGilvray, the game goes on- / as told to Norman Tasker.	McGilvray, Alan, 1910-	30.00
14	BK	980385958	Kids' sport : A survival guide for grown-ups / Denis Baker	Baker, Denis	9.95
15	BK	I442	Ball by ball : the story of cricket broadcasting / Christopher Martin-Jenkins.	Martin-Jenkins, Christopher,	35.00
16	BK	STOCK0036048	Quidditch through the ages / Kennilworthy Whisp [i.e. J.K. Rowling].	Rowling, J.K. 1965-	16.00
17	BK	STOCK0036049	Quidditch through the ages / Kennilworthy Whisp [i.e. J.K. Rowling].	Rowling, J.K. 1965-	16.00
18	BK	STOCK0036195	After stumps were drawn : the best of Ray Robinson's cricket writing / selected by Jack Pollard ; foreword by Sir Donald Bradman.	Robinson, Ray, 1905-1982.	22.00
19	BK	STOCK0036196	After stumps were drawn : the best of Ray Robinson's cricket writing / selected by Jack Pollard ; foreword by Sir Donald Bradman.	Robinson, Ray, 1905-1982.	22.00
20	BK	STOCK0036197	Cricket : how to become a champion / [by] John Snow ; edited by Martin Tyler.	Snow, John A., 1941-	25.00
21	BK	STOCK0037016	Hover car racer [electronic resource] / Matthew Reilly ; read by Sean Mangan.	Reilly, Matthew.	0.00
22	BK	980473288	Fine glances : A connoisseur's cricket anthology / edited by Tom Graveney and Mike Seabrook		20.00
23	BK	95783	Testing 1		0.00
24	BK	STOCK0038862	Darkest fear / Harlan Coben.	Coben, Harlan, 1962-	25.00
25	BK	STOCK0038864	Drop Shot / Harlan Coben	Coben, Harlan, 1962-	15.00
26	CI	C7894	Boronia Cricket Club	Secretary - Mr Andrew Skill	0.00
27	CI	C6835	Rowville Football Club	Secretary - Mr Russell Wall	0.00
28	CI	C6793	Wantirna South Football Club	Secretary - Mr Phil Downey	0.00
29	CI	C5768	Johnson Park Cricket Club	President - Mr Craig Wilkins	0.00
30	CI	C8763	Hoddles Creek Cricket Club		0.00
31	CI	C8724	Lilydale & Yarra Valley Netball Association Inc		0.00
32	RE	980007965	The Oxford companion to Australian Sport / edited by Wray Vamplew [et.al]		50.00
33	RE	STOCK0036204	The Oxford companion to Australian Sport / edited by Wray Vamplew [et.al]		50.00
34	VI	980259708	The world's greatest cricketers : Part 1		30.00

Word / WordPad

10/02/2016 17:34

Titles

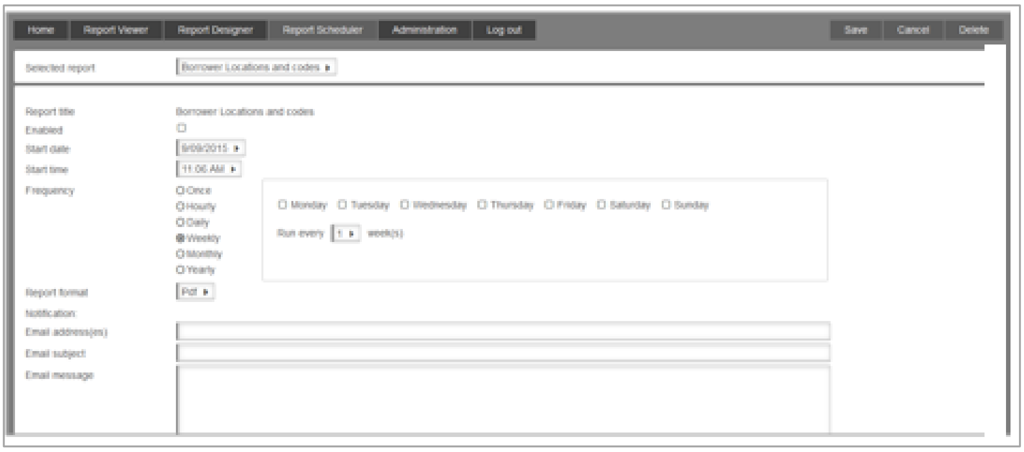
Details shown: all

Catalogue Ref Number	Title
31870	The original Olympics / Ross Stewart
40384	Berlin Olympics / Vince Cross.
41456	The winter Olympics / Nick Hunter.

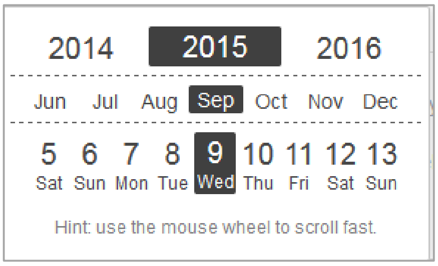
PRINT SCHEDULER

Schedule the reports to be run in the future or on a regular basis

1. Select the Report Scheduler Button from the top
2. Tick the Report that is to be scheduled
3. The Edit schedule window will display at the base of the reports
4. The selected Report Name will display at the top of the schedule

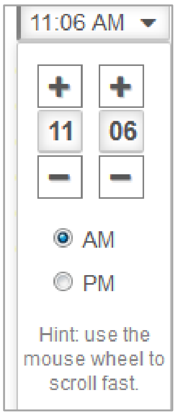


5. The **Enabled** button will display a tick by default
6. Enter the **Start date**
7. A **calendar** box will display with the Current Date selected

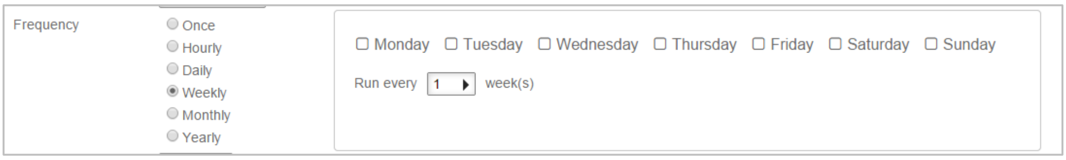


8. Alter this to the start date as required

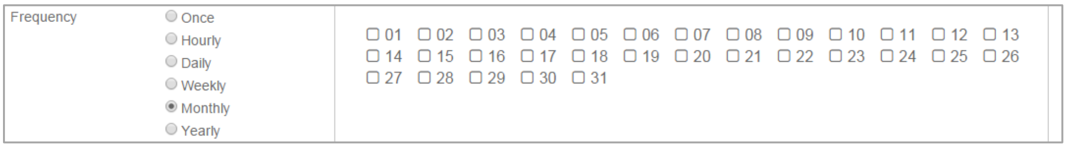
Note: Use the mouse wheel to scroll fast through the Years, Months and Days as appropriate
Enter the **Start time**. A Time pick box displays where the + and – options can be used to set the correct time in 24 hour format



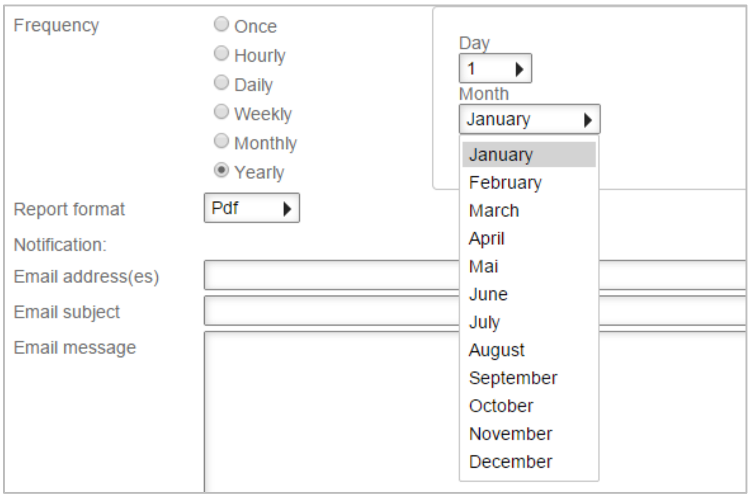
9. Add the Frequency: the format will change depending on the Frequency
   a. Once
   b. Hourly
   c. Daily
   d. Weekly: Select the Day and Weekly frequency (Run every xx weeks)



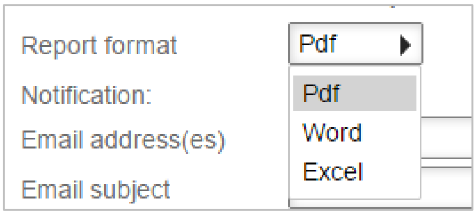
   e. Monthly: Select the Day of the Month on which to run the Report



   f. Yearly: Enter the Day and Year on which the report is to run



10. Enter the Report format
    - Pdf
    - Word
    - Excel

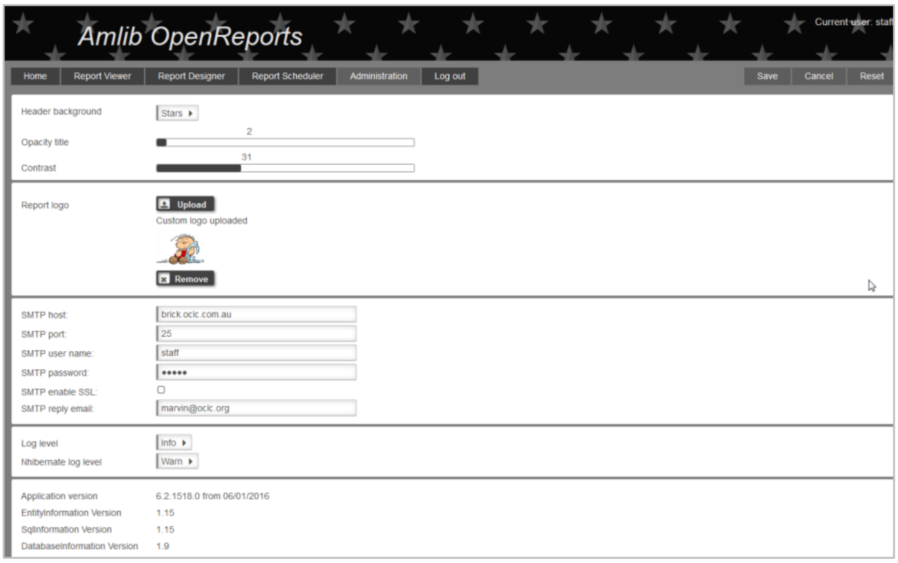


11. Enter details for Email notification if required:
    a. Email Address (es)
    b. Email Subject
    c. Email message

12. Select Save to update the scheduler from the top of the window

ADMINISTRATION

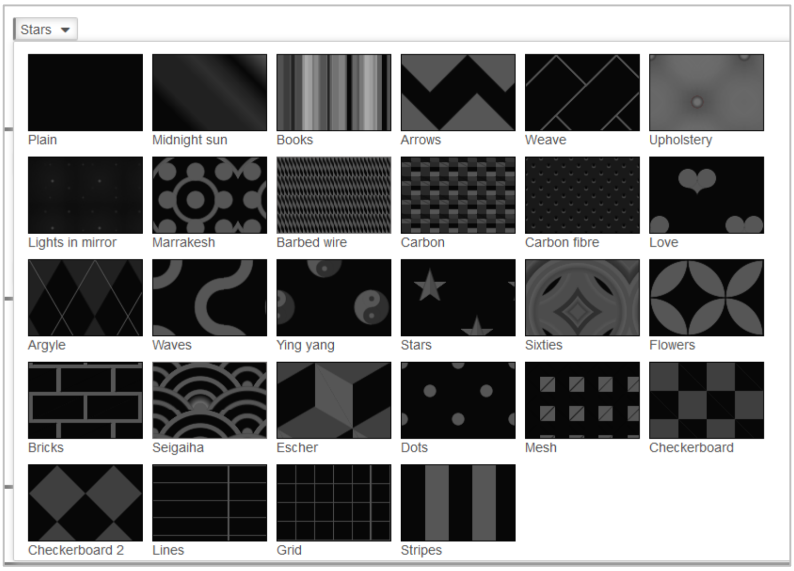
Global Settings



Header Background

It is possible to set the top Header banner with a particular pattern

1. Select the **Arrow** to the right of the Header Background field
2. The patterns will display
3. Select the required pattern by selecting on it
4. The **Pattern Name** will display in the Header Background Field
5. Continue with the other settings
6. Selection **Save** at the bottom of the window will save all the settings



Opacity

Select the transparency level of the Title. The opacity-level describes the transparency-level from 0-100

1. *Slide* the **value** along the bar to the transparency level required where**:**
   - 100 is not transparent at all
   - 50 is 50% transparent
   - 0 is completely transparent
2. Continue with the other settings
3. Selection **Save** at the bottom of the window will save all the settings

Opacity: 100

Opacity: 50

Opacity: 0

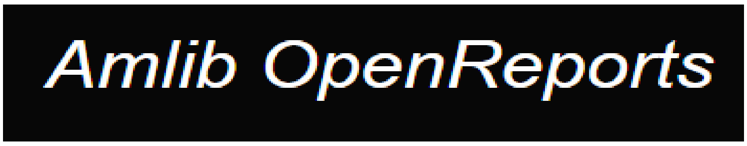
Contrast

Select the Contrast level of the 2 colours of the Header. The contrast can be set at a level from 0-100

1. *Slide* the **value** along the bar to the contrast level required where**:**
   - 100 is full contrast
   - 50 is mid contrast
   - 0 is completely transparent
2. Continue with the other settings
3. Selection **Save** at the bottom of the window will save all the settings

Contrast: 50

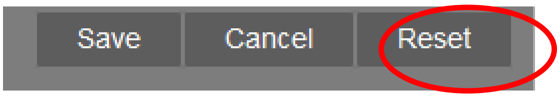
Contrast: 25



Contrast: 0

Reset Session

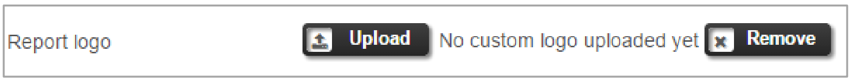
Use the **Reset session** to stop the current web session and restart. You may want to reset a session in situations in which the session is not functioning correctly or if the session has stopped responding.



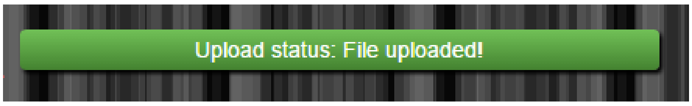
Selecting the Reset Session button will return you to the Login Window

Report Logo

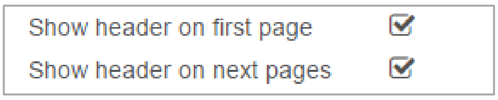
If required a logo can be chosen to be used for the heading for Reports.



1. Select **Upload**
2. A Windows Dialogue box will display where you can navigate/browse to the correct Logo image file
3. Once chosen, select **Open** to load it into Memory
4. Once selected the banner will display showing it was uploaded



5. The **Logo** will then display at the top left of each report printed



OCLC
The world's libraries. Connected.

8/02/2016 2:54 PM

Borrower Locations and codes

Details shown: first 1000

Borrower Barcode	Borrower Full Name-Surname, Given	Borrower Location	Borrower Location Details
Borrower Location Details: Belmont Library			
ALL0007	Allely, Paul	BELMONT	Belmont Library
ALT0008	Altmann, Zara	BELMONT	Belmont Library
B237	Anderson, Alana	BELMONT	Belmont Library
AND0008	Anderson, Deanna	BELMONT	Belmont Library
AND0014	Andersson, Emily	BELMONT	Belmont Library
B409	Ansell, Kevin	BELMONT	Belmont Library
B7013	Ansell, Nick	BELMONT	Belmont Library
ARC0002	Archbold, Amber	BELMONT	Belmont Library
B1232	Arnold, Grace	BELMONT	Belmont Library
B7001	Arnold, Hannah	BELMONT	Belmont Library
ARN0010	Arnold, Jemma	BELMONT	Belmont Library
ARN0008	Arnott, Liam	BELMONT	Belmont Library
B7002	Arthur, Brooke	BELMONT	Belmont Library
B7024	Ashworth, Tate	BELMONT	Belmont Library
ASK0001	Askew, Jacqui	BELMONT	Belmont Library

2/5/2015 5:59:10 PM

Borrower List

Borrower Barcode	Borrower Surname	Borrower Given Name
ATTHOWEAI	Atthowe	Aiden
B237	Anderson	Alana
ABRAHAMAN	Abraham	Andrew
ALANIZAN	Alaniz	Antonia
ALEXANDEAS	Alexander	Asher
ARNOTTBR	Arnott	Bradley
ADEYBR	Adey	Brayden
ADDISONEBR	Addison-Edgar	Brodie

To Remove the Logo

1. Click **Remove**
2. A message will display at the top of the Window to show it is deleted

Custom logo deleted

3. It will show that no custom Logo has been uploaded

Report logo | Upload | No custom logo uploaded yet | Remove

4. The Logo will no longer display at the top of each report printed

SMTP Details: If patrons will be able to email their reports results, the SMPT and Email Options - this will need to be completed

SMTP Host: Enter the SMTP Host name of the Server or IP address

SMTP Port: Enter the SMTP Port Number

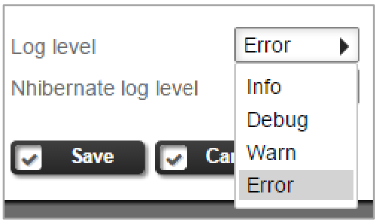
SMTP user name: Enter the SMTP User name if required for access

SMTP password: Enter the SMTP User name if required for access

SMTP enable SSL: Tick if **SMTP Enable SSL** is to be enabled**:** This allows for the SMTP Client using a *Secure Sockets Layer* (*SSL*) to encrypt the connection for your email. If you want an unencrypted connection **DO NOT** tick the **SMPT ENABLE SSL**

SMTP reply email: Enter the email address you wish to use if patrons reply to the email, so that it does not get lost going to the SMTP email address which will likely not be received correctly by the library

Log level



Logs all normal application events when you call the web site, go back to Amlib etc. Select the Log Level from the drop-down choices, as appropriate:

Generally we recommend setting it to **WARN** unless there is a reason why it is necessary to capture more complex information

1. **Debug**: Highest level of logging, should only be used if OCLC suggests to set it to this level
2. **Info**: Information Presents information helpful in resolving the issues, but slows down the application
3. **Warn**: Warning of harmful situation. This should be the default
4. **Error:** Lowest level of detailing: only serious errors are logged

Nhibernate Log Level

NHibernate log level is the database access layer (all the SQL statements etc, which will result in very long complex logs if set to INFO or DEBUG, and will slow the application. The default should be **WARN** or **ERROR**. We suggest do not change this level unless OCLC Support suggests a different Level.

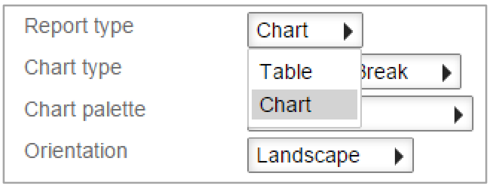
Generally we recommend setting it to **WARN** unless there is a reason why it is necessary to capture more complex information

The logs are written to a folder in the folder in **inetpub\wwwroot\OCLC OpenReports\OclcLogFiles**

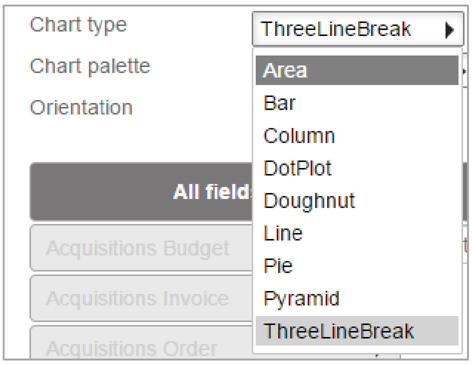
Version Displays the Version Number and Date/Time. For example: You are currently running Version 1.0.0.0 from 13/08/2014 9:36:00 am

CHART OPTIONS

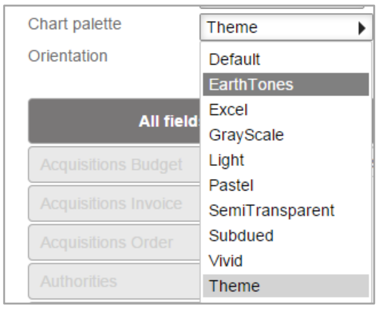
1. Select the **Report Type** of **Chart**



2. Select the **Chart Type**
    - Area
    - Bar
    - Column
    - DotPlot
    - Doughnut
    - Line
    - Pie
    - Pyramid
    - ThreeLineBreak



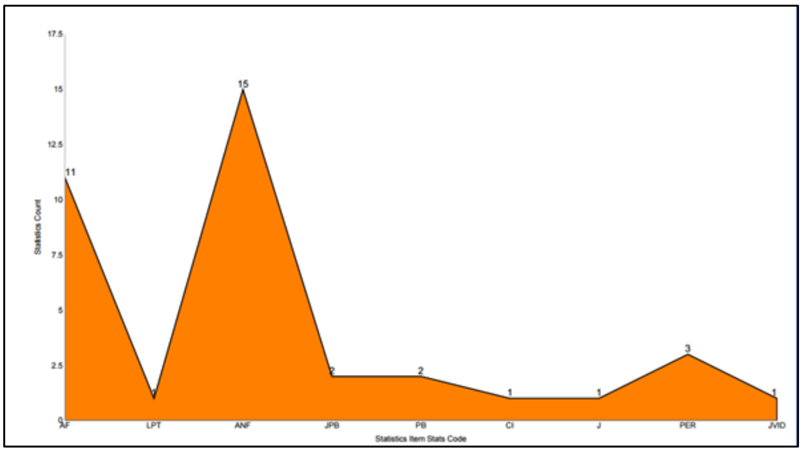
3. Select the **Chart Palette**
    - Default
    - Earth Tones
    - Excel
    - GrayScale
    - Light
    - Pastel
    - SemiTransparent
    - Subdued
    - Vivid
    - Theme



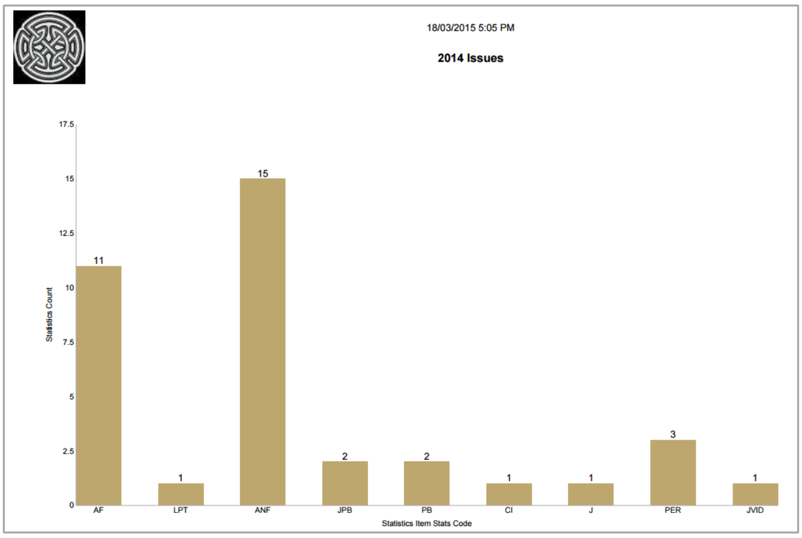
4. Select the **Orientation**
5. **Preview** the Report
6. **Save** if required

EXAMPLES OF CHARTS

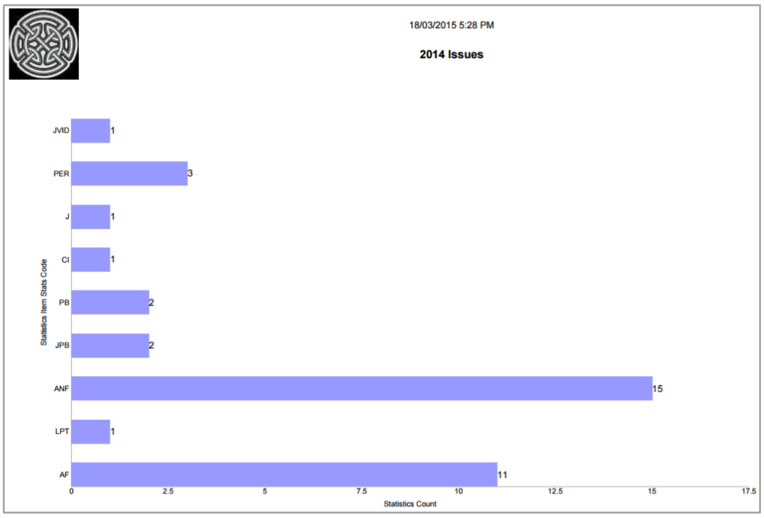
1. Area
    - Earth Tones



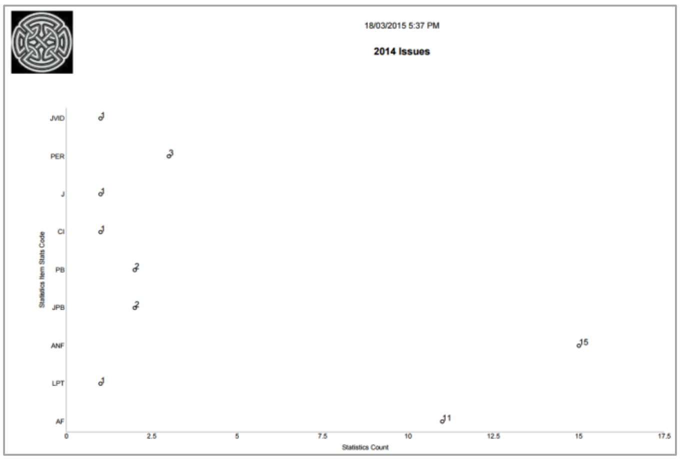
2. Column
    - Default



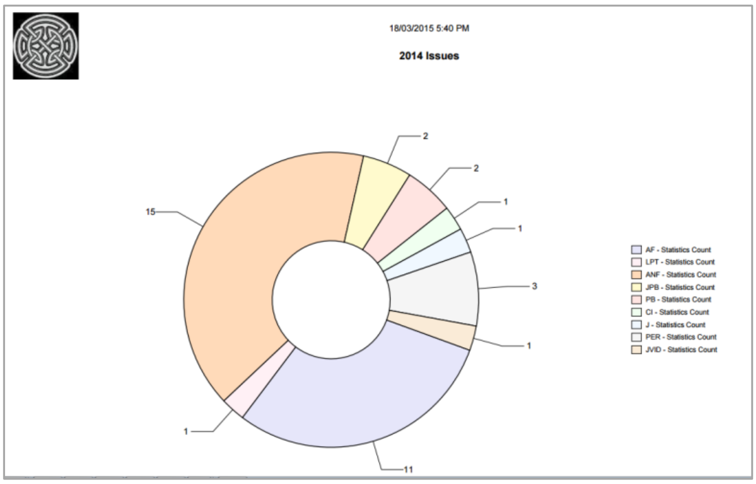
3. Bar
    - Excel



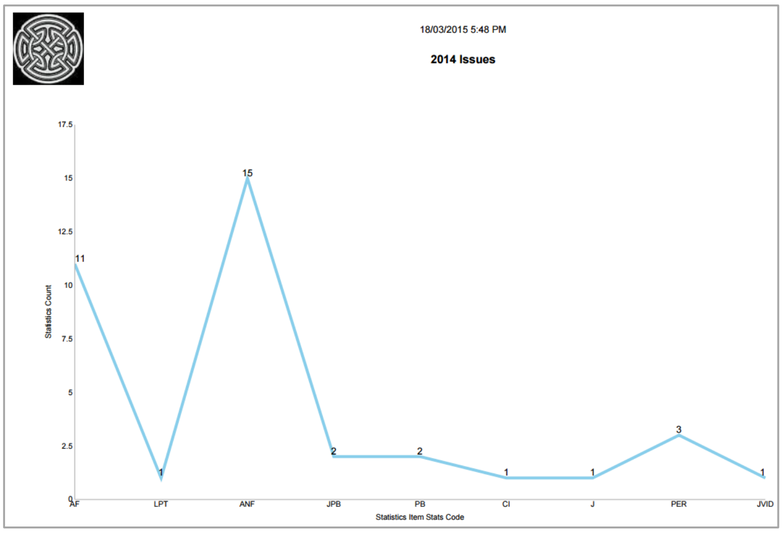
4. DotPlot
    - GreyScale



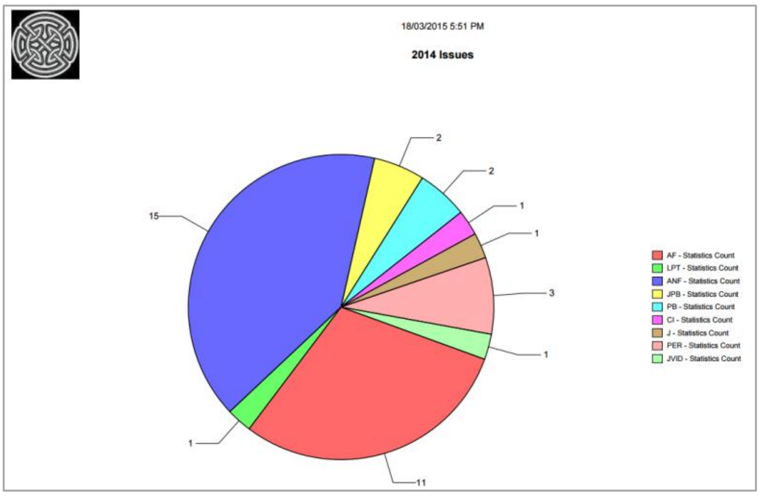
5. Doughnut
    - Light



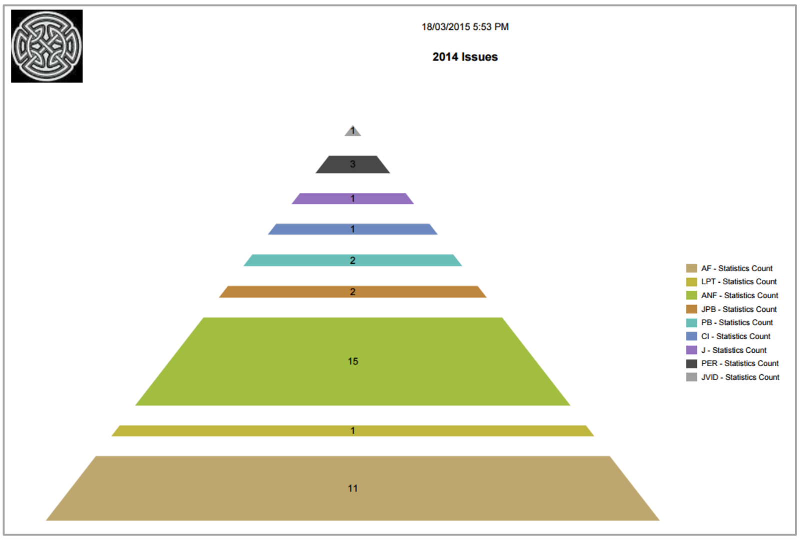
6. Line
    - Pastel



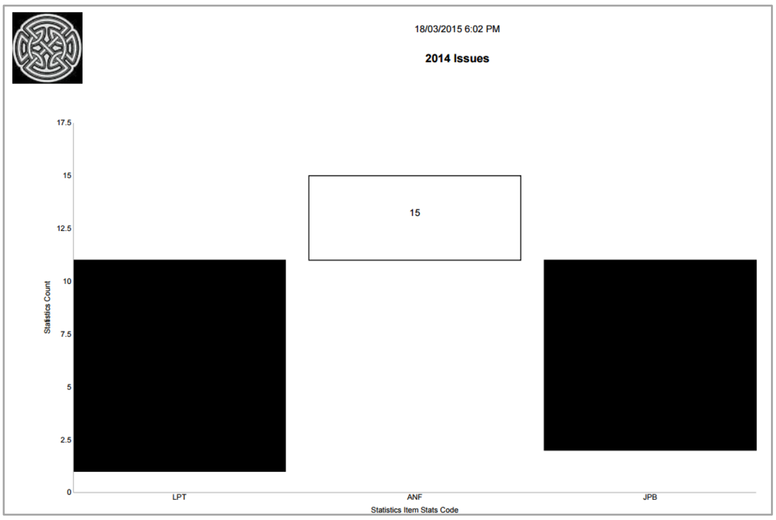
7. Pie
    - Semi Transparent



8. Pyramid
    - Subdued



9. ThreeLineBreak
    - Vivid



STEP BY STEP SAMPLE - BORROWER CONTACT LIST

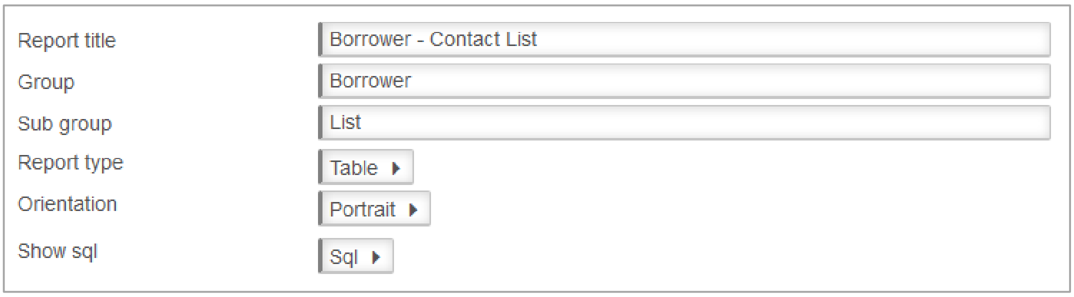
This is a quick guide to creating our first report. Start simply and refine later and have an idea what your layout should include!

Skills outlined in this Sample:

a. Creating a giving a Title to a New Report
b. Choosing Orientation
c. Creating a Group and Sub Group for indexing
d. Choosing Display Fields
e. Previewing, Saving Ordering of results
f. What to do if a wrong Field is selected, Editing a Format
g. Changing the Column Name and the Width of the Field

1. Select **New** from the buttons of the *Report Designer*

2. The Edit Report Window will display



3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Borrower – Contact List**".
4. Enter a **Group** if the Reports are to be grouped logically together so they can be found easier in Report Viewer and Designer, for example **Borrower**
5. Enter a **Sub Group** if the Reports are going to be grouped further together by a secondary classification - for example **List**
6. Choose **Report Type** from the Drop-down options (Table is default):
7. **Table** – set out in rows and columns (select for the sample)
8. Chart – if set to chart there are many options in relation to what
9. Select **Orientation** – this will depend on the amount of detail required
   - Landscape
   - **Portrait** (select for the sample)

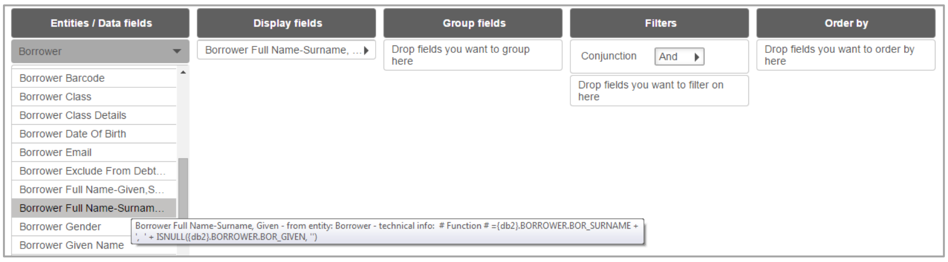
10. **Show details:** For this sample Report we can set to **All**
11. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample leave this **unticked**.
12. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample leave this **unticked**.
13. **Private.** If you wish the report **only** to be available under your Login (Default is unticked). For our sample leave this **unticked**.
14. Show header on first page. For our sample leave this **ticked**
15. Show header on next pages. For our sample leave this **unticked**

Display Fields

1. Highlight the **Entity** from the **Entities / Data Fields**
2. For our sample, select the entity of **Borrower**
3. The Entity opens up to display all of the Data Fields for Borrower
4. The Data Fields are listed in Alphabetical Order

Note: The Order in which the Fields are listed, give the order in which the Fields are displayed. They can be manipulated up and down the Table under Display Fields until you get the order correctly placed

5. Highlight the required Field for the Borrower. This could be:
   - **Full Name - Surname, Given** which is a useful Function that gives the Surname, Given name in one field. Alternatively it is possible to select Surname and Given Name separately or Full Name – Given, Surname if preferred
6. **Drag and drop** into the Display Field Table

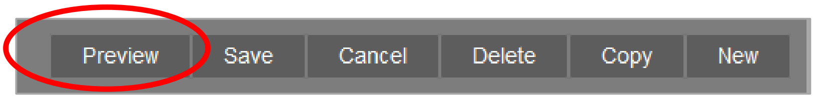


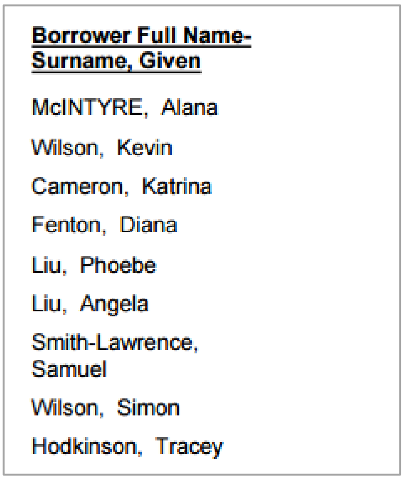
Note: If *the wrong data element* is brought across, simply drag the Field into white space and "let it go" to delete it from the Display Fields Table

7. At this point it is possible to Select **Preview** from the top of the window, just to check how the Name will display. The Borrowers names will display

Preview

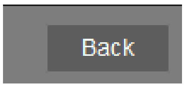
1. Select Preview to view the report





Notice how the **Name** *wraps*. It is possible to adjust the **size** of the Data Field to prevent this wrapping. Also the Header could be simplified to just name

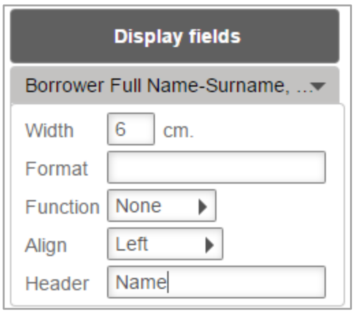
2. Select **Back** to return to the Report Designer



3. To change the Header and the Width of the Data Field

For the sample change the Full Name-Surname, Given Header to simply Borrower

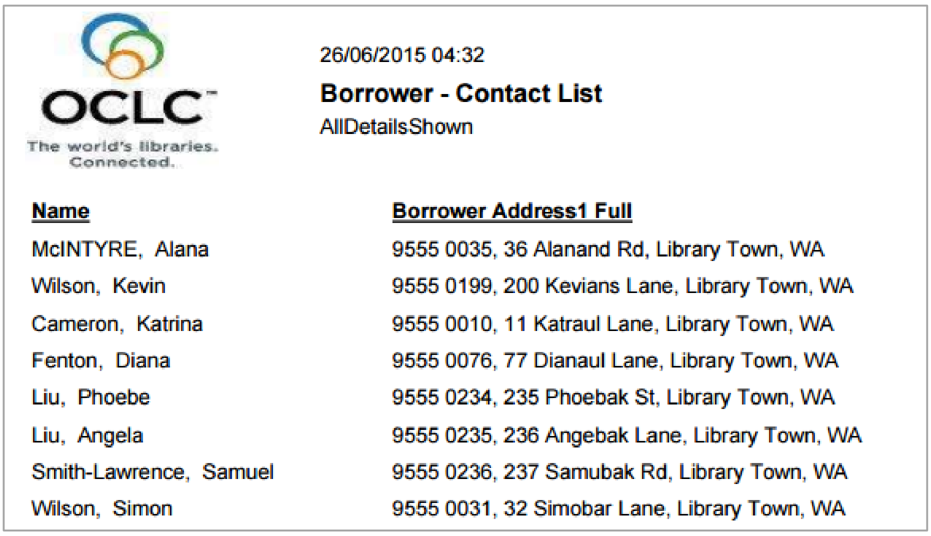
   a. Select on the **Full Name-Surname, Given Display** Field
   b. Options will display
   c. Change the Width from 4cm to 6cm



   d. Overtype the Header with **Name**
   e. Select out of the box

4. Continue to drag other **Data Fields** as required

For the Sample we would like to list the Full Address 1 as well. Select Borrower Full Address 1 and drag it across. Preview to check the list. The name no longer wraps. The Name Header is simplified. It is also possible to alter the Header for the Borrower Address1 Full to be just Residential Address or what is relevant


26/06/2015 04:32

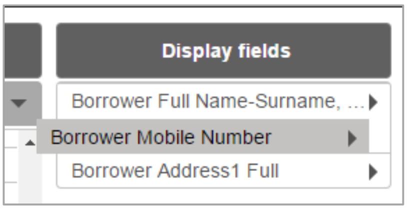
Borrower - Contact List

AllDetailsShown

Name	Borrower Address1 Full
McINTYRE, Alana	9555 0035, 36 Alanand Rd, Library Town, WA
Wilson, Kevin	9555 0199, 200 Kevians Lane, Library Town, WA
Cameron, Katrina	9555 0010, 11 Katraul Lane, Library Town, WA
Fenton, Diana	9555 0076, 77 Dianaul Lane, Library Town, WA
Liu, Phoebe	9555 0234, 235 Phoebak St, Library Town, WA
Liu, Angela	9555 0235, 236 Angebak Lane, Library Town, WA
Smith-Lawrence, Samuel	9555 0236, 237 Samubak Rd, Library Town, WA
Wilson, Simon	9555 0031, 32 Simobar Lane, Library Town, WA

5. Select **Back** to return to the Report Designer
6. Continue to select any other Data Fields required into the Display fields Table by dragging and dropping. It is possible to determine where it will drop by Selecting between existing Display Fields until a **Box** is formed, into which the Field can drop

   For example if Borrower Mobile Number is to be included after the Name then a box can be created and the Data element dropped into the space between the other Fields



7. At this point it is possible to recheck the **Preview** from the top of the window, to check how the report now looks and whether it needs to be refined
8. As the report is being created, the system maybe busy as it compiles the report

Filter

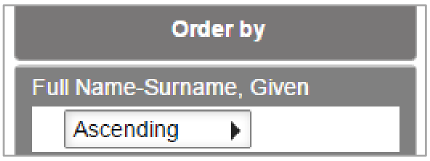
If you want **ALL** Borrowers no filter is necessary. Filters will be discussed later

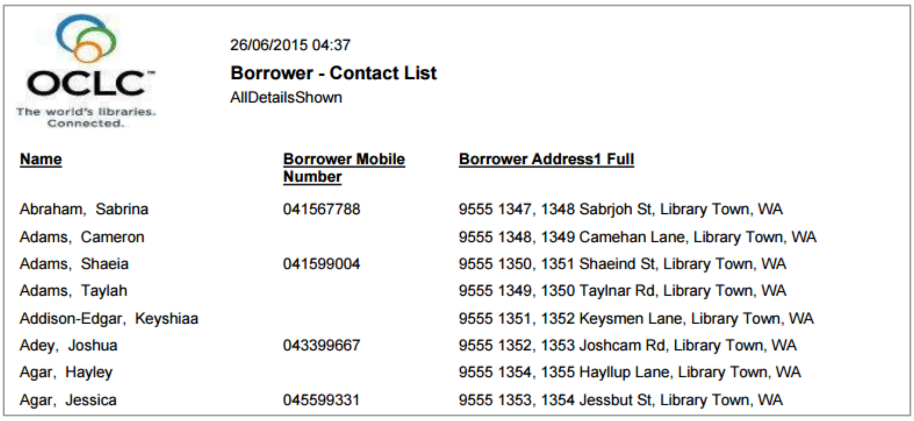
Order by

It is useful in this report to have an Order sequence to ensure it orders correctly so that the Contact List is by Surname alphabetically

Note: Make sure the Order is one of the Data Fields within the Display or Group Columns. If a Group column exists, it is logical to have it ordered by that Data Field first

1. Drag and drop **Data Fields** over to the **Order by** section
2. Select either **Ascending** or **Descending** from the drop-down box
3. In the sample report it is useful to Order it by **Full name – Surname, Given** in **Ascending** Order




26/06/2015 04:37
Borrower - Contact List
AllDetailsShown

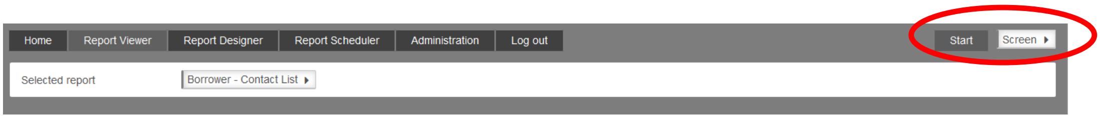
Name	Borrower Mobile Number	Borrower Address1 Full
Abraham, Sabrina	041567788	9555 1347, 1348 Sabrjoh St, Library Town, WA
Adams, Cameron		9555 1348, 1349 Camehan Lane, Library Town, WA
Adams, Shaeia	041599004	9555 1350, 1351 Shaeind St, Library Town, WA
Adams, Taylah		9555 1349, 1350 Taylnar Rd, Library Town, WA
Addison-Edgar, Keyshiaa		9555 1351, 1352 Keysmen Lane, Library Town, WA
Adey, Joshua	043399667	9555 1352, 1353 Joshcam Rd, Library Town, WA
Agar, Hayley		9555 1354, 1355 Hayllup Lane, Library Town, WA
Agar, Jessica	045599331	9555 1353, 1354 Jessbut St, Library Town, WA

Save

Once the Report is successful it is useful to **Save** it to be available in the Report Viewer, so that the report can be used in the future

Report Viewer

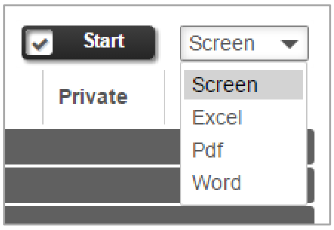
The same report now displays in Report Viewer



Select the required format from the Drop-down options at the top of the Window

- Screen
- Excel
- Pdf
- Word

Once the choice is highlighted Select **Start**



STEP BY STEP - ITEMS ON LOAN - CURRENT LOANS ENTITY

Skills outlined in this Sample – Selecting the Title to show on the first page

1. Introducing a Group Column in the body of the Report
2. Select fields from different entities
3. Move the Data Field up or down the Column to set the Display order
4. Alter the width in the Format,
5. Add a Page Break
6. Filter using a Drop-down option
7. Use the Current Loans entity

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section.. For the sample we can give a Title of “**Items on Loan**”.
5. Enter a **Group** since we want to find it later easily – for example **Loans**
6. Enter a **Sub Group** – for example **Current**

Note: Eventually there could be many Sub groups of Loans including Overdues, Students, Staff, Very Overdue Items etc.

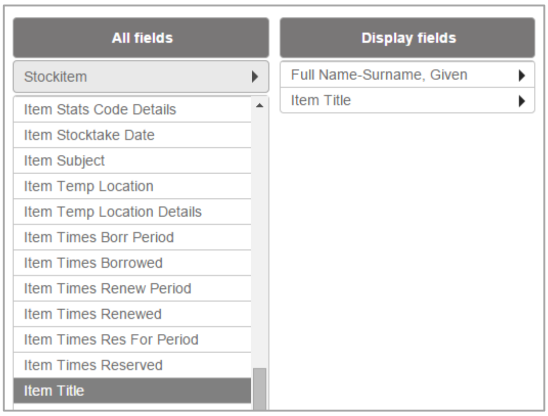
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave S**how Sql**
10. **Show details:** For this sample Report we will leave as the Defaults
    - **All**: Shows the break-down of details within the Fields (Default)
11. **Show Sub totals:** leave this **unticked**.
12. **Show total**: leave this **unticked**.
13. Tick **Private:** leave this **unticked**.
14. **Show header on first page**: For our sample **tick** this one!

15. **Show header on next pages:** This is your choice. But for now leave this **unticked**

Display Fields

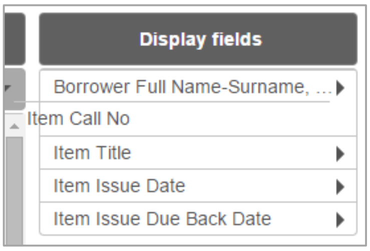
1. Highlight the required **Entity** from the **Entities / Data Fields**_ - For our sample, select the Entity of **Borrower**
1. Highlight the first Field for the Borrower. This could be **Full Name - Surname, Given**
2. **Drag and drop** into the Display Field Table. Alter the heading again if required, for example to **Borrower**
3. Continue to drag other **Data Fields** as required

For the Sample we would like to see the **Item Title** as well. From the Stockitem Entity select Item Title.

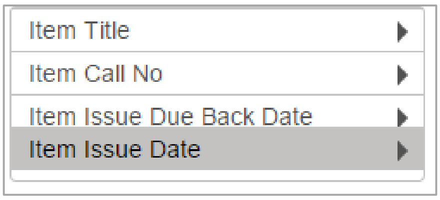


4. Continue to select any other Data Fields required into the Display fields Table by dragging and dropping. For example Item Issue Due Back Date and Issue Date from the **Current Loans Entity**. It is possible to determine where it will drop by Selecting between existing Display Fields until a **Box** is formed, into which the Field can drop

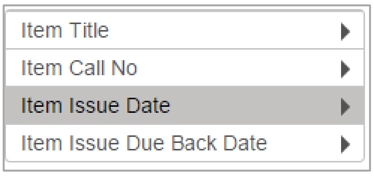
For example if **Item Call No** is to be included after the Item Title then a box can be created and the Data element dropped into the space between the other Fields



5. Once the Display Fields are selected, it is possible to set the Display hierarchy by moving the Display Fields up or down the Table
   - **Highlight** the **Field** to move



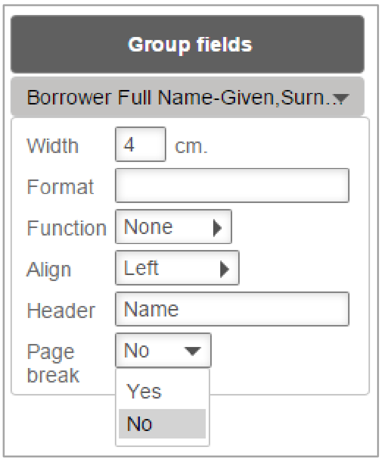
- **Drag** it up the list to where it will display and **drop** it into the **Box** formed



Group Fields

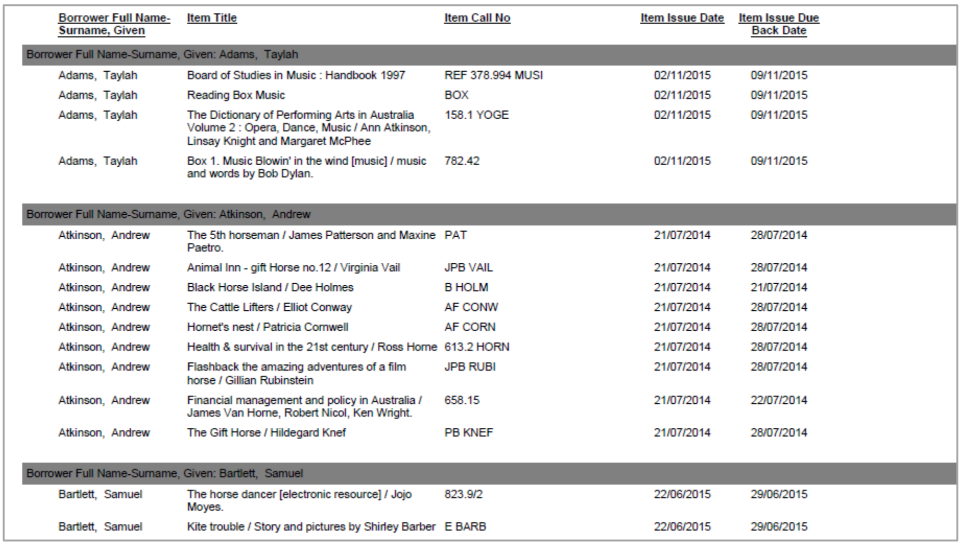
It could be useful to Group the Borrower's name so that it only shows once for each Borrower

1. Add the **Full Name-Surname, Given Field** to the **Group Fields** table
2. Remove the Field from the Display Fields Table by dragging it and dropping it into the white space
3. It may be necessary to alter the Header again. It is possible to decide if you want a Page break for the Group field. For our Sample select **No**



4. **Preview** the report again to see the changes. The Borrower's name no longer repeats

Note: The Grouped Fields display as shadowed Text on the report, making it stand out



Borrower Full Name-Surname, Given	Item Title	Item Call No	Item Issue Date	Item Issue Due Back Date
Borrower Full Name-Surname, Given: Adams, Taylah				
Adams, Taylah	Board of Studies in Music : Handbook 1997	REF 378.994 MUSI	02/11/2015	09/11/2015
Adams, Taylah	Reading Box Music	BOX	02/11/2015	09/11/2015
Adams, Taylah	The Dictionary of Performing Arts in Australia Volume 2 : Opera, Dance, Music / Ann Atkinson, Linsay Knight and Margaret McPhee	158.1 YOGE	02/11/2015	09/11/2015
Adams, Taylah	Box 1. Music Blowin' in the wind [music] / music and words by Bob Dylan.	782.42	02/11/2015	09/11/2015
Borrower Full Name-Surname, Given: Atkinson, Andrew				
Atkinson, Andrew	The 5th horseman / James Patterson and Maxine Paetro.	PAT	21/07/2014	28/07/2014
Atkinson, Andrew	Animal Inn - gift Horse no.12 / Virginia Vail	JPB VAIL	21/07/2014	28/07/2014
Atkinson, Andrew	Black Horse Island / Dee Holmes	B HOLM	21/07/2014	21/07/2014
Atkinson, Andrew	The Cattle Lifters / Elliot Conway	AF CONW	21/07/2014	28/07/2014
Atkinson, Andrew	Hornet's nest / Patricia Cornwell	AF CORN	21/07/2014	28/07/2014
Atkinson, Andrew	Health & survival in the 21st century / Ross Horne	613.2 HORN	21/07/2014	28/07/2014
Atkinson, Andrew	Flashback the amazing adventures of a film horse / Gillian Rubinstein	JPB RUBI	21/07/2014	28/07/2014
Atkinson, Andrew	Financial management and policy in Australia / James Van Horne, Robert Nicol, Ken Wright.	658.15	21/07/2014	22/07/2014
Atkinson, Andrew	The Gift Horse / Hildegard Knef	PB KNEF	21/07/2014	28/07/2014
Borrower Full Name-Surname, Given: Bartlett, Samuel				
Bartlett, Samuel	The horse dancer [electronic resource] / Jojo Moyes.	823.9/2	22/06/2015	29/06/2015
Bartlett, Samuel	Kite trouble / Story and pictures by Shirley Barber	E BARB	22/06/2015	29/06/2015

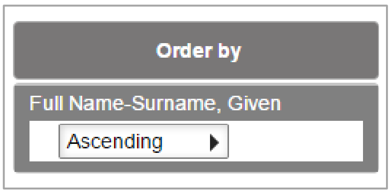
Filter

1. Select **Current Loans** Entity
2. Select **Item Issue Date**
3. Choose **Not Empty** from the Drop down options
4. Other Filters may include **Issue Dates** to target exactly the data required. For example: filter the results to get only those loans issued in the last week, only those overdue, only those out to Students, only those out to Housebound borrowers etc.

Order by

It is useful to have an Order sequence to ensure it orders correctly

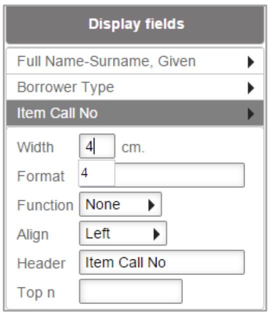
1. Drag and drop Data Fields over to the Order by section
2. Select either Ascending or Descending from the drop-down box
3. In the sample report it is useful to Order it by **Full name – Surname, Given** in **Ascending** Order



Width

For the sample, notice the Call No had lots of space but the Title was sometimes a bit cramped. It is possible to change the width of the Call No Field and Title

1. Return to **Report Designer**
2. Select on the **Item Call No** Field
3. Options will display



4. Change the **Width** from 6cms to 4cms
5. Select out of the box
6. Change the **Title width** too, to make it from 10cms to 15cms in the same way
7. **Preview** the report again to see the changes. There is now less space taken up by the Item Call No and the Item Title does not wrap so much

If the Report is successful it is useful to **save it**, to be available in the Report Viewer

COUNTS

There are numerous methods of getting Counts and Sum within OpenReports, from very basic Counts to Subtotals and Totals, and more complex displays of Top borrowers per Borrower Type and Top items per Form or Stats code etc.

STEP BY STEP - SIMPLE COUNT OF ITEMS

Skills outlined in this Sample:

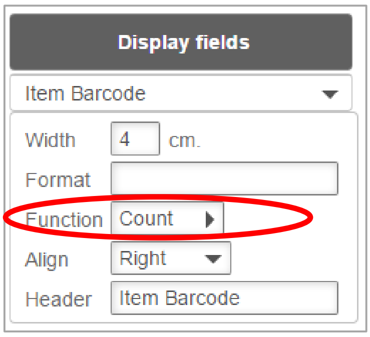
- Getting Item Totals only
- Getting Totals and Subtotals
- Using a Display Field and a Group Field
- Changing the format to be a Count

1. Select **New** from the buttons of the **Report Designer**
2. The **Edit** Report_Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**All Items**"
4. Enter a **Group** if the Reports for example **Stockitem**
5. Enter a **Sub Group** for example **Counts**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (does not matter as it will just show a simple Count)
8. **Show Sql** Leave **Sql** as is
9. **Show details**: For this sample Report we will leave as the Defaults
   - **None**: Shows the numbers for the results but not the details within the Report. Fields will be hidden
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **untick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
12. Tick **Private** For our sample leave this **unticked**.
13. **Show header on first page**. For our sample leave this **unticked**
14. **Show header on next pages**. For our sample leave this **unticked**

Display Fields

1. Highlight the **Entity** from the **Entities / Data Fields**
2. For this sample, select the entity of **Stockitem**
3. Drag and drop **Item Barcode** into the Display Field Table, which will Count the Nos of Barcodes
4. Select on the **Item Barcode** to make the Function Count



Group

Unless the Count is to be grouped in some way leave this blank

Filter

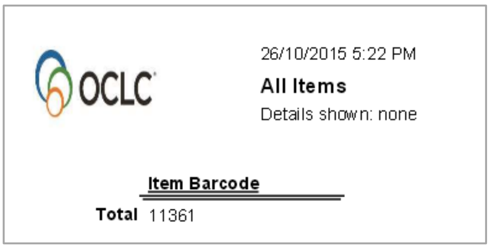
Unless the Count is to be filtered in some way leave this blank

Order by

An Order is not necessary as it is just a count

Preview

1. *Select* **Preview** to view the Report

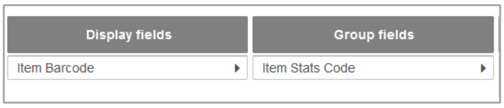


Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

- Try breaking down this report by simply **grouping** by **Stats code** or **Form Code**

Tip: Ensure that you have **Subtotals** AND **Totals** ticked in the **Show Details** section to get the break-down totals



- Try filtering by an element to get more targeted results – for example use the Calendar to get only new items, or filtering it be only local Stock (Item Barcode begins with AL or what may be appropriate), or filtering it to get only a certain Item Process like Missing

- There are countless possibilities…..start Saving a list that can be used again and again

STEP BY STEP - COUNT BY GENDER

Skills outlined in this Sample are revising those used last time

- Use of the **Count Function** within a **Data Field** for a simple count
- No Filter
- Right aligning figures
- Gaining Subtotals and Totals

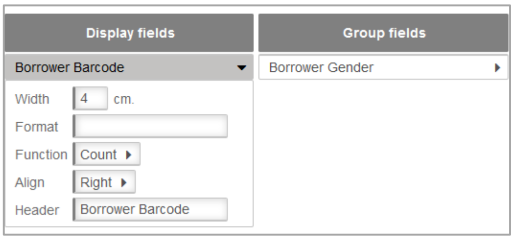
A site may wish to get a break-down of counts of Males and Females and those Patrons where the Field is still empty. This could be shown as Counts in a Table or as a Graph

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section. For the sample "**Gender of Patrons**"
5. Enter a **Group** since we want to find it later easily – for example **Borrower**
6. Enter a **Sub Group** – for example **Count**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Portrait** (Landscape would work too
9. Leave <u>Sql</u> as is
10. **Show details**: For this sample Report enter
    - **None**: As a straight Count is required
11. **Show Sub totals: Tick** this to get the Subtotals
12. **Show total**: **Tick** this to get the Grand Total
13. Tick **Private**: leave this **unticked** but is your choice
14. **Show header on first page**: For our sample **tick** this one if required
15. **Show header on next pages:** This is your choice. But for now leave this **unticked**

Display Fields

1. Select the Borrower **Entity**
2. Select **Borrower Barcode** Data Field from the **Entity** as every borrower will have a Barcode so it will ensure a Count of every borrower. Drag and drop to **Display** – as this is an uncomplicated report we can set the Count directly for this Field
3. Select the **Borrower Barcode Data Field**



4. Change the **Function** to **Count** (this will ensure the number of Barcodes are counted rather than the sum of the Barcodes)
5. Change the **Align** to **Right** (this will ensure the numbers align right so they sit correctly in the listing
6. Change the Header if required. For example **No of Borrowers** so it makes sense of the Count when it is displayed

Group Fields

Drag and drop **Borrower Gender** to the <u>G</u>**roup** fields to split the report into the Gender codes used by your Library

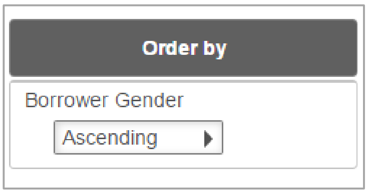
Filter

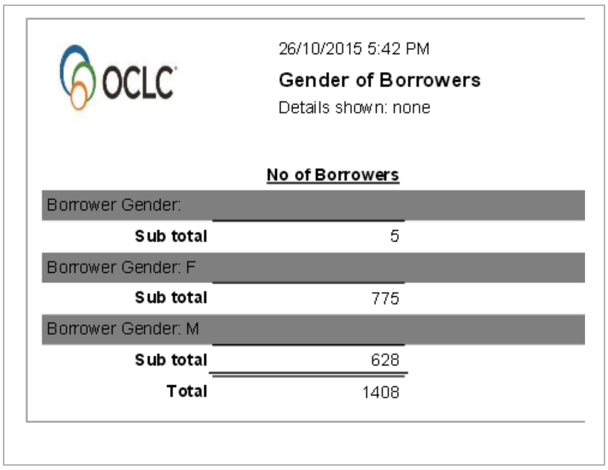
If ALL borrowers are to be counted, split by Gender, there is no need to set a Filter!

Order by

Sometimes it is useful to have an Order sequence if the way it orders the report by Default is not how it should display. For example,

1. Drag and drop **Borrower Gender** to the **Order by** section
2. Leave as Default (Ascending)





Preview

Select **Preview** to view the Report

Save

Once the Report is successful, select **Save** to be available in the Report Viewer

STEP BY STEP - TOP 10 BORROWERS BY BORROWER TYPE

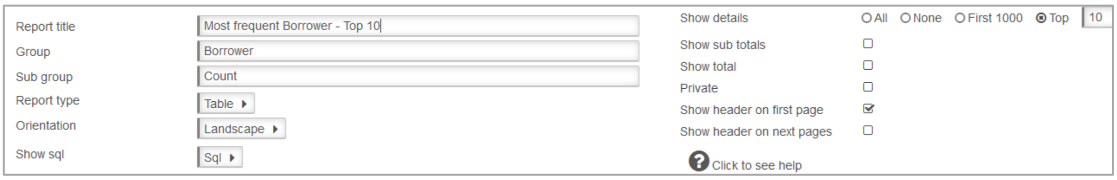
We have had many requests to categorise the groupings by Borrower Type – for instance “Who are the top 10 readers by Borrower Type or Borrower Class etc.”

Some sites have the Reading monitored by Borrower type (Keep Housebound Borr History) set to Y. If that is the case it is possible to use the Borrower History Type of READING. If set to N, then it is possible to set up a similar report using Stockitem History shown in the next Sample

Skills outlined in this Sample are revising those used as last time as well as:

- Use of the Top 10
- Order by Descending
- Use of the Group Detail Field from the Counter Entity
- Selecting dates from the calendar
- Simplifying Headers to improve layout and display

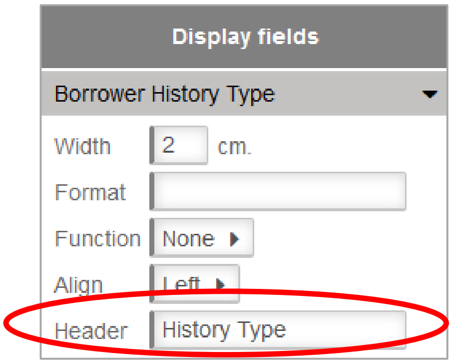
1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display



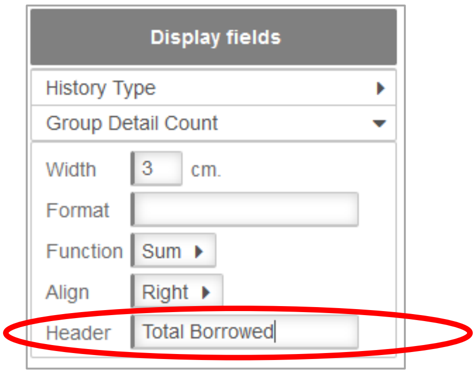
4. Enter a **Report Title** in the Report Title section. For the sample “**Most frequent Borrower – Top 10**”
5. Enter a **Group** since we want to find it later easily – for example **Borrower**
6. Enter a **Sub Group** – for example **Top 10**
7. Choose **Report Type** from the Drop-down options (Table is default):
    - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
    - **Portrait** (select for the sample)
9. **Show details**: For this sample Report enter
    - **Top**: Enter the Top value required – for example 10
10. **Show Sub totals:** leave this **unticked**.
11. **Show total:** leave this **unticked**.
12. Tick **Private**: leave this **unticked**.
13. **Show header on first page:** For our sample **tick** this one if required
14. **Show header on next pages:** This is your choice. If there is a Page Break for Borrower Type, **tick** this

Display Fields

1. Select the **Borrower History** Entity
2. Select **Borrower History Type** from the Entity and drag and drop to Display – this will set the Counter correctly so it knows to count from the History Table. Simplify to History Type by Selecting on the Data Field and changing the Header



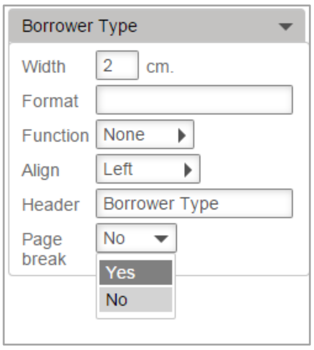
3. Select the Entity of **Counter**
4. Drag and drop **Group detail count** to the Display Fields.
5. Select **Group detail count** to expand the display options.



6. Ensure the **Function** is **Sum** so it adds the counts together
7. Change the **Header** if required. For example, simplify to Total Borrowed

Group Fields

1. Drag and drop **Borrower Type** to the **Group** fields. It is possible if required to have a Page Break between Borrower Type Selecting on the Data Field and selecting Page Break

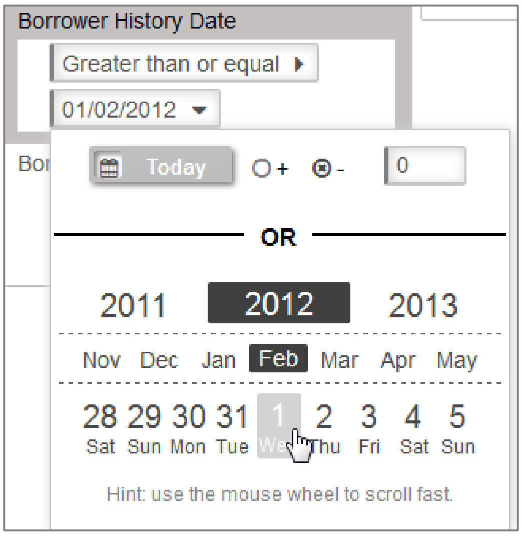


2. Drag and drop the **Data Fields** that describe the **Borrower** to the **Group fields**. This can vary. For the sample we have chosen **Borrower Full Name – Given, Surname**. We have simplified this to **Name**

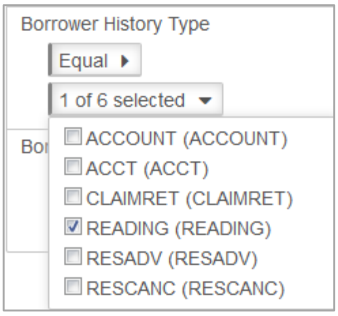
Filter

The Filter can be selected to target exactly the data required. For example: filter the results to get ALL current Loans

1. Select the **Borrower History Entity**
2. Drag and drop **Borrower History Date** over to the **Filter By** Section
3. Select **Greater than** from the Drop-down Options
4. Enter a **Date** as appropriate using the **calendar**. **Note**: A Date range could be set if required



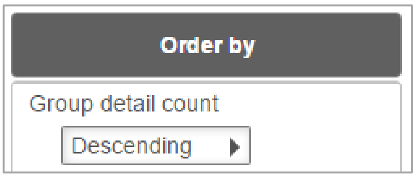
5. Drag and drop **Borrower History Type** over to the **Filter** By Section
6. Select the **History Type** to report on (likely to **READING**)



Order by

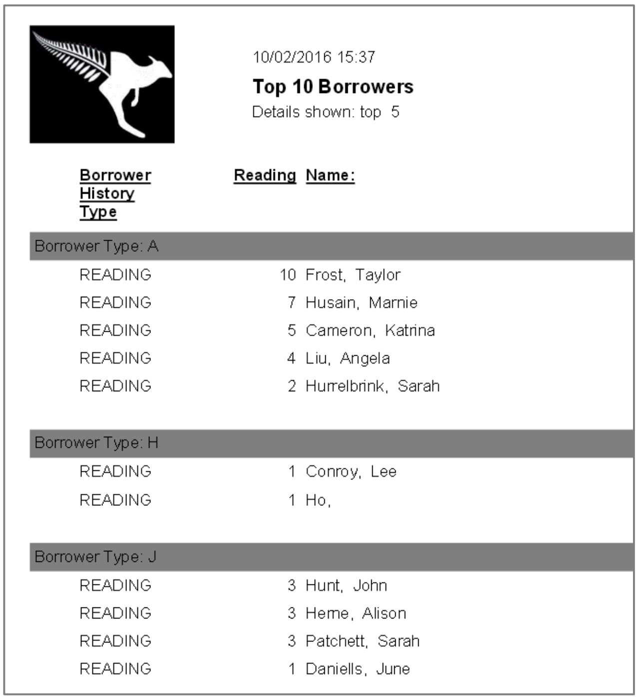
It is useful to have an Order sequence of Group detail count to be *Descending* so it shows correctly

1. Select **Group detail count** from the Counter Entity and drag and drop to the **Order by** section
2. Select **Descending** from the drop-down box



Preview

1. Select **Preview** to view the Report



10/02/2016 15:37
Top 10 Borrowers
Details shown: top 5

Borrower History Type	Reading	Name:
Borrower Type: A		
READING	10	Frost, Taylor
READING	7	Husain, Marnie
READING	5	Cameron, Katrina
READING	4	Liu, Angela
READING	2	Hurrelbrink, Sarah
Borrower Type: H		
READING	1	Conroy, Lee
READING	1	Ho,
Borrower Type: J		
READING	3	Hunt, John
READING	3	Herne, Alison
READING	3	Patchett, Sarah
READING	1	Daniells, June

Save

Once the Report is successful, select **Save** to be available in the Report Viewer

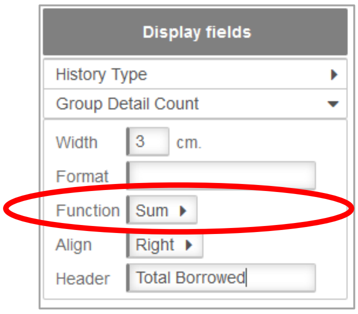
Note: Try the same approach to get the Top 10 by Borrower Class or Group

If you do not keep the **Borrower History** for each type, adjust the above report in the following way.

If you do not keep Borrower Reading History try using the Stockitem History instead…as shown below..

Display Fields
Select the Stockitem History Entity

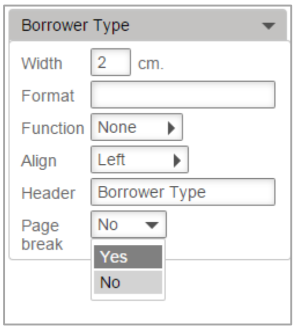
1. Select **Stockitem History Type** from the Entity and drag and drop to Display – this will set the Counter correctly so it knows to count from the History Table. Simplify to History Type by Selecting on the Data Field and changing the Header
2. Select the Entity of **Counter**
3. Drag and drop **Group detail count** to the Display Fields.
4. Select **Group detail count** to Format



5. Ensure the **Function** is **Sum** so it adds the counts together
6. Change the **Header** if required. For example, simplify to Total Borrowed

Group Fields

3. *Drag and drop* **Borrower Type** to the **Group** fields. It is possible if required to have a Page Break between Borrower Type Selecting on the Data Field and selecting Page Break

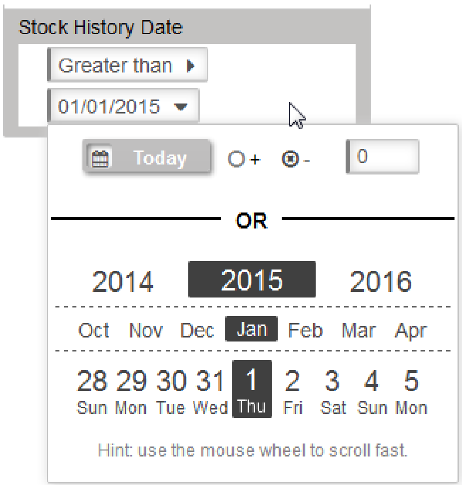


4. Drag and drop the Data Fields that describe the Borrower to the Group fields. This can vary. For the sample we have chosen **Borrower Full Name – Given, Surname**. We have simplified this to Name

Filter

The Filter can be selected to target exactly the data required. For example: filter the results to get ALL current Loans

7. Select the **Stock History Entity**
8. Drag and drop **Stock History Date** over to the **Filter By** Section
9. Select **Greater than** from the Drop-down Options
10. Enter a **Date** as appropriate using the **Calendar. Note**: A Date range could be set if required

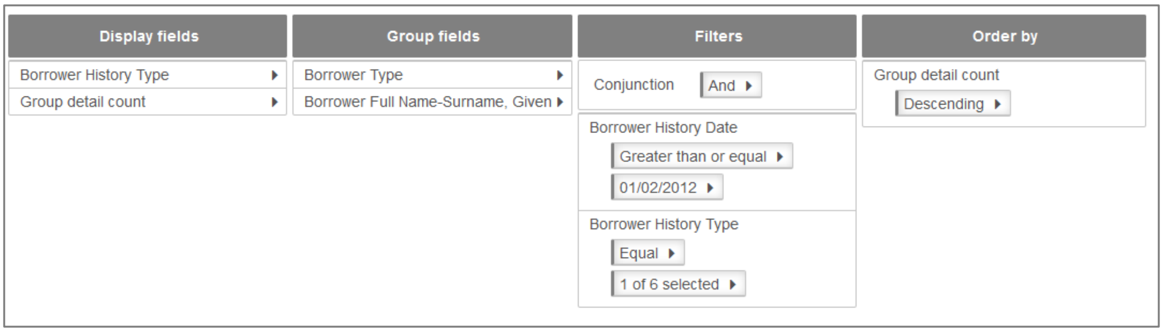


11. Drag and drop **Stock History Type** over to the **Filter By** Section
12. Select the History Type to report on (likely to ISSUE or RETURN)

Order by

It is useful to have an Order sequence of Group detail count to be *Descending* so it shows correctly

3. Select Group detail count from the Counter Entity and drag and drop to the **Order by** section
4. Select **Descending** from the drop-down box



Preview

2. Select **Preview** to view the Report

10/02/2016 12:37

Top 10 Borrowers

Details shown: top 3

Borrower History Type	Group detail count	Borrower Full Name-Surname, Given
Borrower Type: A		
READING	10	Frost, Taylor
READING	7	Husain, Marnie
READING	5	Cameron, Katrina
Borrower Type: H		
READING	1	Conroy, Lee
READING	1	Ho,
Borrower Type: J		
READING	3	Hunt, John
READING	3	Herne, Alison
READING	3	Patchett, Sarah

Save

1. Once the Report is successful, select **Save** to be available in the Report Viewer

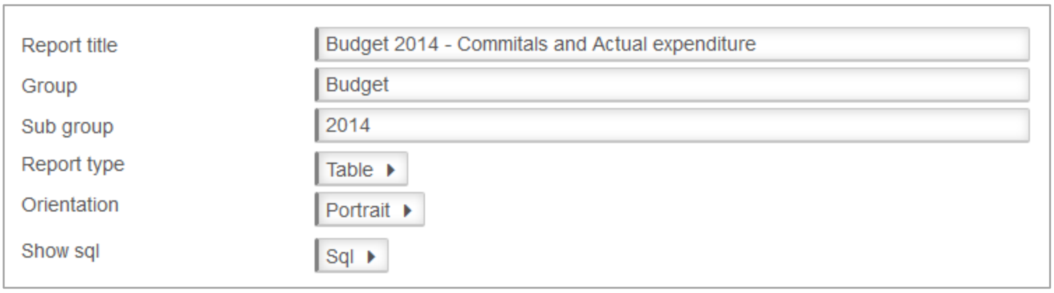
SAMPLE REPORTS FROM MAIN ENTITIES

ACQUISITIONS BUDGET ENTITY – BUDGET COMMITTALS

Skills outlined in this Sample are revising those used as last time as well as:

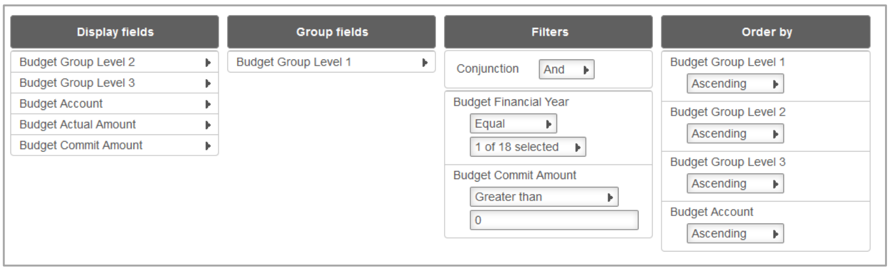
- Setting the currency Format
- Setting a Sum Function

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display



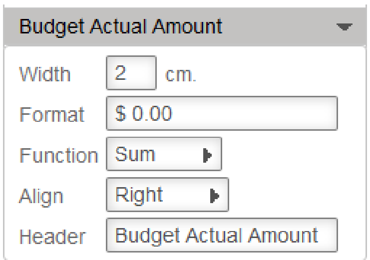
4. Enter a **Report Title** in the Report Title section. For the sample "**Budget 2014 – Committals and Actual expenditure**"
5. Enter a **Group** since we want to find it later easily – for example **Budget**
6. Enter a **Sub Group** – for example **2014**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Portrait** (select for the sample but depends on how many Display fields are selected)
8. Ignore **Show sql**

9. **Show details:** For this sample Report enter
   - **All**: Enter the Top value required – for example 10
10. **Show Sub totals**: Have this **ticked** if a Group exists, where subtotals are required
11. **Show total:** Have this **ticked** if main totals are required
12. Tick **Private:** Optional - leave this **unticked**.
13. **Show header on first page:** For our sample **tick** this one if required
14. **Show header on next pages:** This is your choice. But for now leave this **unticked**



Display Fields

1. *Select* the **Acquisitions Budget** Entity
2. *Select* **required** Data Field/s from the Entity and *drag and drop* to Display – in our sample, we included Budget Group Level 2, Budget Group Level 3, Budget Account, Budget Actual Amount and Budget Commit Amount. It depends on which Data Fields are to be displayed
3. It is possible to change the Money fields for *Actual and Committed Amounts* to show as Dollars, by changing the Format to $ <space>0.00 ($ 0.00). Ensure that the Function is set to Sum if using Subtotals and Totals

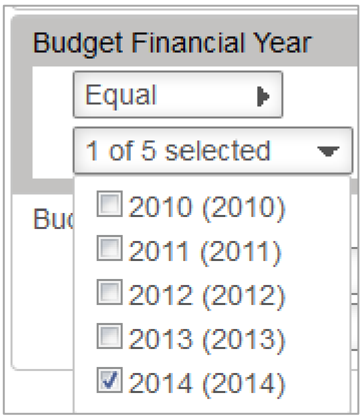


Group Fields

We selected Budget Group Level 1 as the Group Fields as each Location is a different Level 1. If your Budget has only 1 Level 1 then it maybe more interesting to Group by Budget Level 2 for example

Filter

1. Drag and drop **Budget Financial Year** to the **Filter** Column. Select Equal and use the Drop-down options to select the correct year



2. If only wanting Committals outstanding for example, it is possible to Drag and drop **Acquisitions Budget Commit Account** to the **Filter** column. Select **Greater than (>)** and enter 0.00

Order

It is useful to have an Order and often depends what the Group is to make it a logical sequence

Preview

Select **Preview** to view the Report

OCLC

30/10/2015 6:10 PM

Budget 2014 - Commitals and Actual expenditure

Details shown: all

Budget Group Level 3	Budget Group Level 2	Budget Account		Budget Actual Amount	Budget Commit Amount
Budget Group Level 1 Details: Chelsea Branch					
BBK	BV	10010		$ 32.81	$ 19.01
BBK	BV	10020		$ 32.12	$ 60.45
BBK	BV	10040		$ 0.00	$ 114.00
OOF	OE	19220		$ 0.00	$ 99.97
			Sub total	$ 64.93	$ 293.43
Budget Group Level 1 Details: Hastings Branch					
BBK	BV	40020		$ 0.00	$ 114.40
BBK	BV	40040		$ 0.00	$ 11.00
BBK	BV	40050		$ 0.00	$ 13.64
			Sub total	$ 0.00	$ 139.04
			Total	$ 64.93	$ 432.47

Save

Once the Report is successful, select **Save** to be available in the Report Viewer

Note: Try adapting this Report by using sequences or combination of Accounts

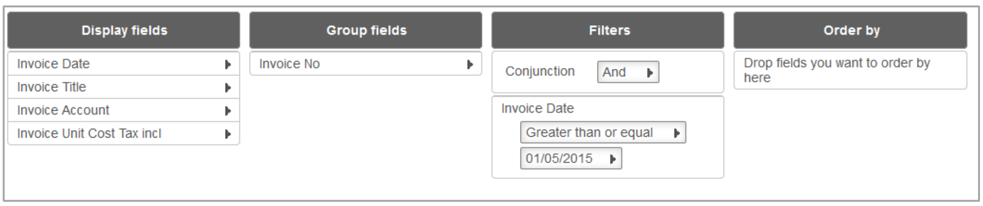
Report on the most recent Account expenditure for example

Try using a Chart to display the Budget allocations for the year!

ACQUISITIONS INVOICE ENTITY - INVOICES SINCE MAY 2015

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section. For the sample "**Invoices this Month – May 2015**"
5. Enter a **Group** since we want to find it later easily – for example **Invoices**
6. Enter a **Sub Group** – for example **List**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Ignore Show sql
10. **Show details**: For this sample Report enter
    - **All**: Select ALL
11. **Show Sub totals:** Have this **ticked** if subtotals are required
12. **Show total:** Have this **ticked** if main totals are required
13. Tick **Private**: leave this **unticked**.
14. **Show header on first page**: For our sample **tick** this one if required
15. **Show header on next pages:** This is your choice. But for now leave this **unticked**



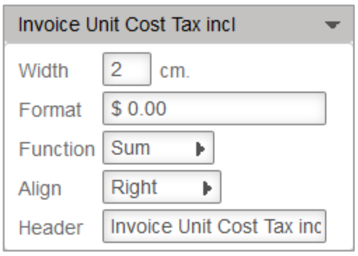
Display Fields

4. Select the **Acquisitions Invoice** Entity

5. Select **required** Data Field/s from the Entity and *drag and drop* to Display – in our sample, we included Invoice Date, Invoice Title, Invoice Account and Invoice Unit Cost Tax incl. It depends on which Data Fields are to be displayed

6. It is possible to change the Money fields for **Invoice Unit Cost Tax incl**. to show as Dollars

By changing the Format to $ <space>0.00 ($ 0.00). Ensure that the Function is set to Sum if using Subtotals and Totals

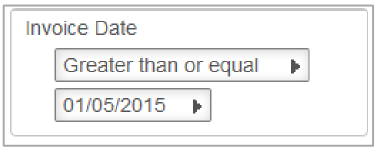


Group Fields

We selected Invoice No as the Group Field to add the Totals for each Invoice number separately and to prevent repetition of the Invoice No

Filter

Drag and drop **Invoice Date** to the **Filters** Column. Select **Greater than or equal to** and use the **Calenda**r to set the Date. It is possible to also set a date range by having another Date being Less than a certain date

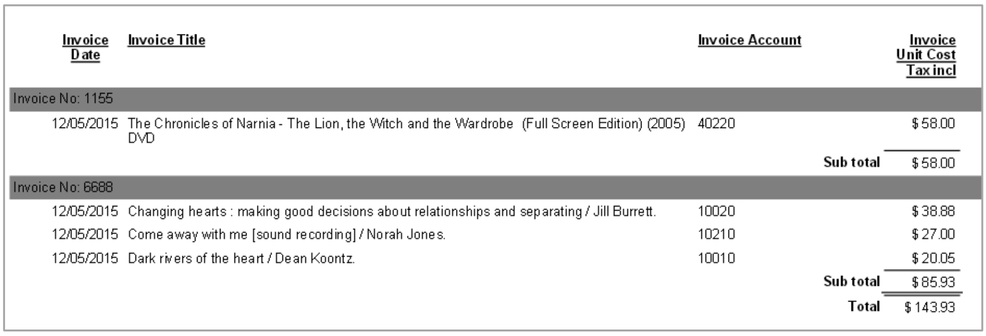


Order

It is useful to have an Order and often depends what the **Group** – for example Invoice Number.

Preview

1. Select **Preview** to view the Report



Invoice Date	Invoice Title	Invoice Account	Invoice Unit Cost Tax incl
Invoice No: 1155			
12/05/2015	The Chronicles of Narnia - The Lion, the Witch and the Wardrobe (Full Screen Edition) (2005) DVD	40220	$ 58.00
		Sub total	$ 58.00
Invoice No: 6688			
12/05/2015	Changing hearts : making good decisions about relationships and separating / Jill Burrett.	10020	$ 38.88
12/05/2015	Come away with me [sound recording] / Norah Jones.	10210	$ 27.00
12/05/2015	Dark rivers of the heart / Dean Koontz.	10010	$ 20.05
		Sub total	$ 85.93
		Total	$ 143.93

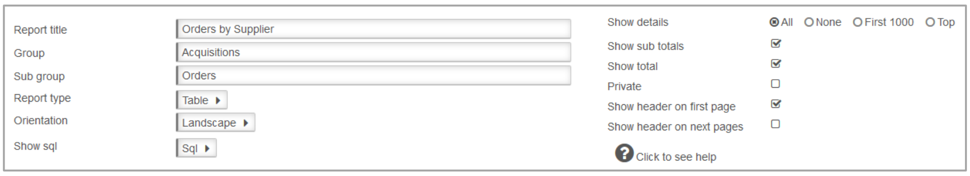
Save

Once the Report is successful, select **Save** to be available in the Report Viewer

Note: Try adapting this Report by using different Display choices

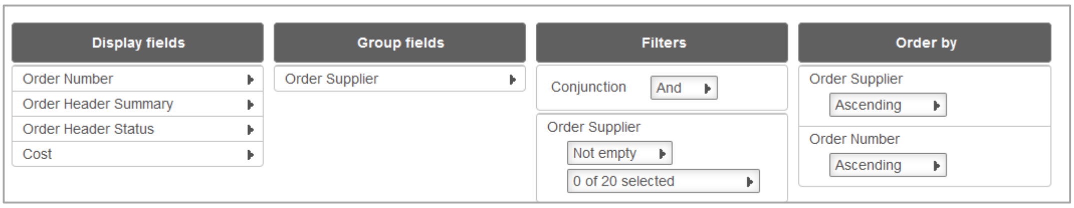
ACQUISITIONS ORDER ENTITY - ORDERS BY SUPPLIER

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display



4. Enter a **Report Title** in the Report Title section. For the sample "**Orders by Supplier**"
5. Enter a **Group** since we want to find it later easily – for example **Acquisitions**
6. Enter a **Sub Group** – for example **Orders**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Ignore Show sql
10. **Show details:** For this sample Report enter
    - **All**: Enter the Top value required – for example 10
11. **Show Sub totals**: Have this **ticked** if subtotals are required
12. Show total: Have this ticked if main totals are required
13. Tick **Private:** leave this **unticked**.
14. **Show header on first page**: For our sample **tick** this one if required
15. **Show header on next pages:** This is your choice. But for now leave this **unticked**

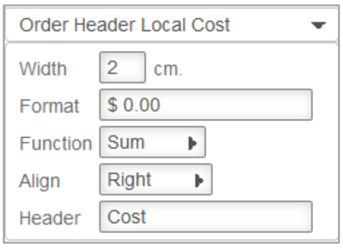
Display Fields



1. *Select* the **Acquisitions Orders** Entity

2. *Select* **required** Data Field/s from the Entity and *drag and drop* to Display – in our sample, we included Order Number, Order Header Summary, Order Header Status and Order Header Local Cost. It depends on which Data Fields are to be displayed

3. It is possible to change the Money fields for *Order Header Local Cost.* to show as Dollars By changing the Format to $ <space>0.00 ($ 0.00). Ensure that the Function is set to Sum if using Subtotals and Totals. We also changed the Header to just Cost



Group Fields

We selected Supplier as the Group Field to add the Totals for each Order Header by Supplier

Filter

Drag and drop **Supplier** to the **Filters** Column. To get All Suppliers it is possible to leave the Filter blank or Choose Supplier not empty. It is also possible to add an Order Date Placed to get Orders placed in a Date range or just the most recent Orders

Order

It is useful to have an Order and often depends what the Group – for example Supplier, Order Number

Preview

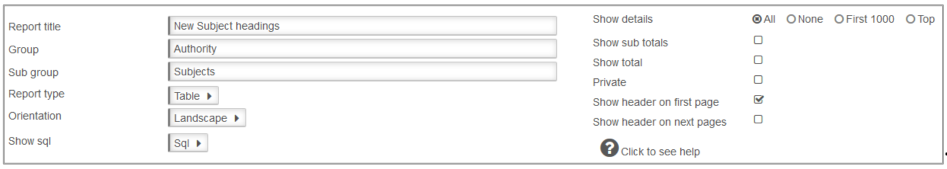
Select **Preview** to view the Report

Order Number	Order Header Summary	Order Header Status	Cost
Order Supplier: AUSLIB			
508	Narnia Series Replacement Titles	ORDERED	$ 35.00
		Sub total	$ 35.00
Order Supplier: BT			
529	Book week books	INVOICED	$ 83.86
		Sub total	$ 83.86
Order Supplier: DYM			
520	The Chronicles of Narnia DVD	INVOICED	$ 58.00
521	Harry Potter and the Deathly Hallows (Book 7)	ORDERED	$ 33.00
522	Officeworks - May Order	ORDERED	$ 109.98
525	dymocks	PENDING	$ 0.00
527	Bookweek	INVOICED	$ 128.00
528	test	INVOICED	$ 30.00
		Sub total	$ 358.98

It is also possible to get Order Line details for several or one Order Number

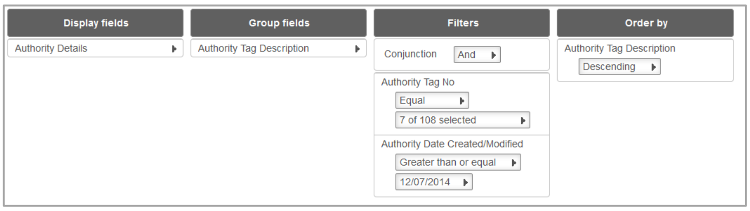
AUTHORITY ENTITY - NEW SUBJECT HEADINGS

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Repor**



t Window will display

4. Enter a **Report Title** in the Report Title section. For the sample "**New Subject Headings**"
5. Enter a **Group** since we want to find it later easily – for example **Authorities**
6. Enter a **Sub Group** – for example **Subjects**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details**: For this sample Report enter
    - **All**: Enter the Top value required – for example 10
11. **Show Sub totals:** leave this **unticked**.
12. **Show total:** leave this **unticked**.
13. Tick **Private**: leave this **unticked**.
14. **Show header on first page:** For our sample **tick** this one if required
15. **Show header on next pages**: This is your choice. But for now leave this **unticked**



Display Fields

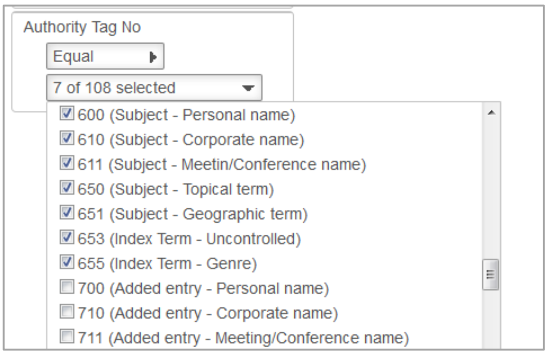
1. Select the **Authority** Entity
2. Select **required** Data Field/s from the Entity and drag and drop to Display – Authority Details to include the Data in each Subject Heading

Group Fields

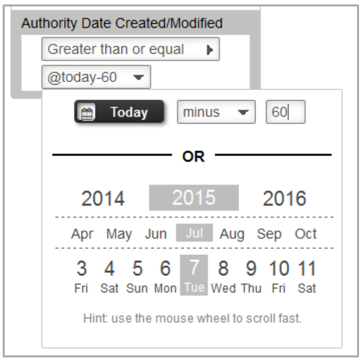
It could be useful to have **Authority Tag Number or Authority Tag Description** as a Group Field to prevent repeating values

Filter

1. Drag and drop **Authority Tag No** to the <u>Filter</u> Column. **Note** that the Drop-down list includes the Tag Number as well as the Description together in the display



2. Drag and drop **Authority Date created/modified** to the **Filters** column. Enter a date using the **Calendar** OR use the **Today minus xx days** (in the sample 60 is entered to show the last 60 days



Order

It is useful to have an Order sequence to order on the Authority Tag No OR Authority Tag Description. We selected Descending for the Authority Tag Description to get the 600s first

Preview

1. *Select* **Preview** to view the Report

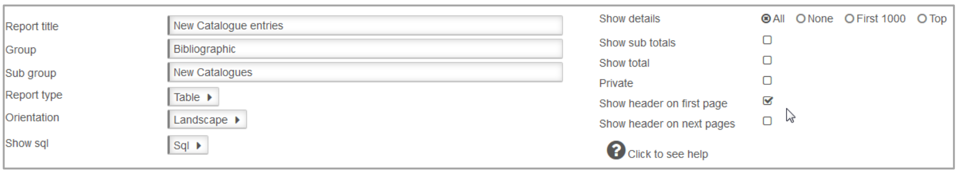
Save

Once the Report is successful, select **Save** to be available in the Report Viewer

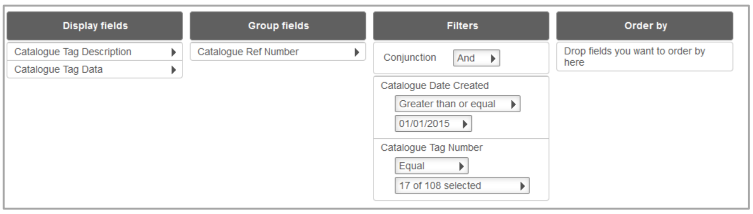
Note: Try adapting this Report by using other Tag Numbers or a combination of Tags

BIBLIOGRAPHIC ENTITY – NEW CATALOGUES ENTRIES

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display



4. Enter a **Report Title** in the Report Title section. For the sample "**New Subject Headings**"
5. Enter a **Group** since we want to find it later easily – for example **Authorities**
6. Enter a **Sub Group** – for example **Subjects**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details**: For this sample Report enter
    - **All**: Enter the Top value required – for example 10**Show Sub totals:** leave this **unticked**.
11. **Show total**: leave this **unticked**.
12. **Private.** Leave this **unticked**.
13. **Show header on first page**: For our sample **tick** this one if required
14. **Show header on next pages:** This is your choice. But for now leave this **unticked**



Display Fields

1. Select the **Bibliographic** Entity
2. Select **required** Data Field/s from the Entity and drag and drop to Display – Catalogue Tag Description and Catalogue Tag Data to include the Data in each Marc Tag. If preferred the Catalogue Tag Number could be used instead of Description

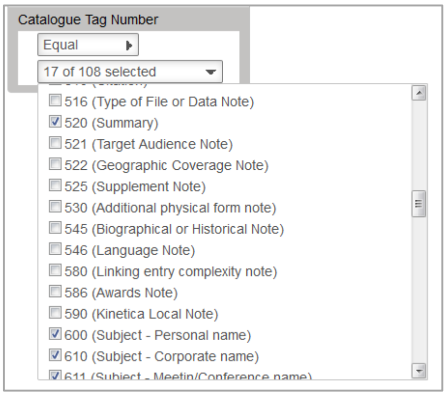
Group Fields

We have chosen to Group by **Catalogue Ref Number** so that each Catalogue is displayed separately

Filter

1. Drag and drop **Catalogue Tag No** to the **Filters** Column.
2. Select the Marc Tags required for the display.

Note that the Drop-down list includes the Tag Number as well as the Description together in the display



3. Drag and drop **Catalogue Date created** to the **Filters** column. Enter a date using the Calendar OR use the Today minus xx days (in the sample a date has been specified

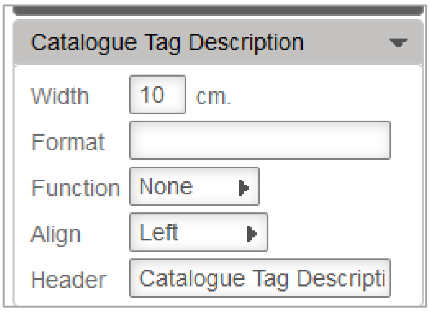
Order

It is useful to have an Order sequence to order on the Catalogue Tag No OR Catalogue Tag Description.

Preview

Select **Preview** to view the Report

When the Preview was viewed it was too much width on the Tag Descriptions so that was made from 15 to 10 cms.



Save

Once the Report is successful, select **Save** to be available in the Report Viewer

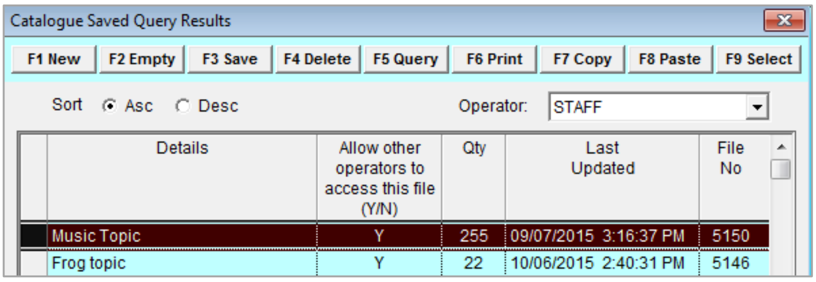
Note: Try adapting this Report by using other Tag Numbers or a combination of Tags

BIBLIOGRAPHIC ENTITY - REPORT FOR A TOPIC FROM A FILE

Skills outlined in this Sample – *Getting Data from a File*

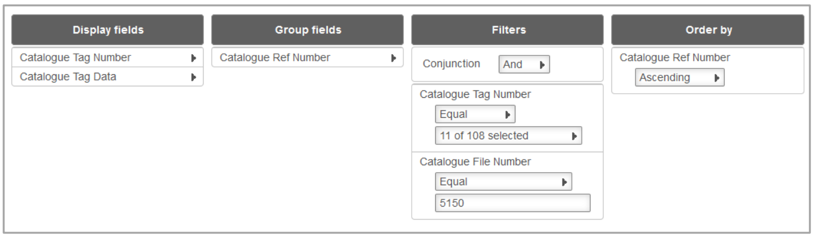
First create a File within Amlib on a Topic. This could be done via a Keyword search within Stockitem and then Xreference to Catalogue and save as a File

Take note of the File No. This could be used within the Filter of OpenReports



1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section. For the sample for example "**Topic of Music**"
5. Enter a **Group** since we want to find it later easily – for example **Bibliographic**
6. Enter a **Sub Group** – for example **Topic**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample) We will test it as a Table and then change it to graph when we are happy with the results
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details**: For this sample Report we will set to ALL
11. **Show Sub totals:** leave this **unticked**.
12. **Show total**: leave this **unticked**.
13. **Private.** Leave this **unticked**.
14. **Show header on first page:** This is your choice. We can have this **ticked**
15. **Show header on next pages:** This is your choice. But for now leave this **unticked**



Display Fields

1. Select the Bibliographic **Entity**
2. Drag and drop Catalogue Tag Number and Catalogue Tag Data into the Display Fields Column

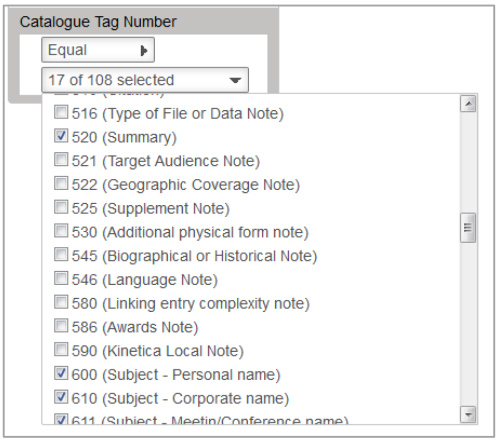
Group Fields

1. Drag and drop the **Cat Ref Number** to the **Group Fields** table

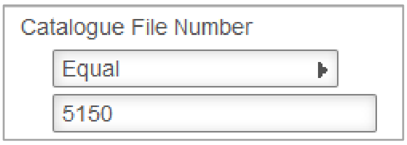
Filter

The Filter can be selected to target a File previously saved into Amlib. The File Number is the best Filter to choose as it is Unique

1. Drag and drop **Catalogue Tag Number** to the **Filter Column**
2. Select **Equal to**
3. Select the Tag Number that will display in the Display from the drop-down option. This is up to you but may include 082 (Call No), 100 (Main Author), 245 (Title), 520 (Notes), any 600 Subject headings



4. Drag and drop **Catalogue File Number** to the **Filter** column
5. Select **Equal to**
6. Enter the **File Number**



Order By

Drag and drop Catalogue Ref Number to the Order by Column. Leave as Ascending

Preview

Select **Preview** to view the Report

Catalogue Ref Number: 35695

082 791.43/72

245 The lord of the rings. The fellowship of the ring [videorecording] / New Line Cinema presents a Wingnut Films production ; producers, Barrie M. Osborne ... [et al.] ; screenplay writers, Fran Walsh ... [et al.] ; director, Peter Jackson.

520 Elderly hobbit Bilbo Baggins relinquishes possession of a golden ring possessing magical powers, to his youthful heir, Frodo. Charged with casting the ring into the fires from which it was forged, the young hobbit begins an arduous trek across Middle

650 Baggins, Frodo (Fictitious character)

Catalogue Ref Number: 35696

082 Video

245 The lord of the rings. The two towers [videorecording] / New Line Cinema presents a WingNut Films production ; directed by Peter Jackson ; screenplay by Fran Walsh, Philippa Boyens, Stephen Sinclair, Peter Jackson ; producers, Barrie M. Osborne, Fran

520 "The fellowship has broken, but the quest to destroy the One Ring continues. Frodo and Sam must entrust their lives to Gollum if they are to find their way to Mordor. As Saruman's army approaches, the surviving members of the Fellowship, along with p

650 Films.

650 Baggins, Frodo (Fictitious character)

650 Middle Earth (Imaginary place)

Save

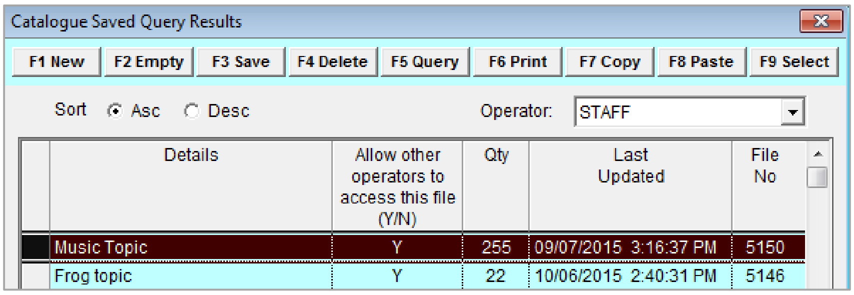
Once the Report is successful, select **Save** to be available in the Report Viewer as a graph

BIBLIOGRAPHIC REPORTS - FROM FILE

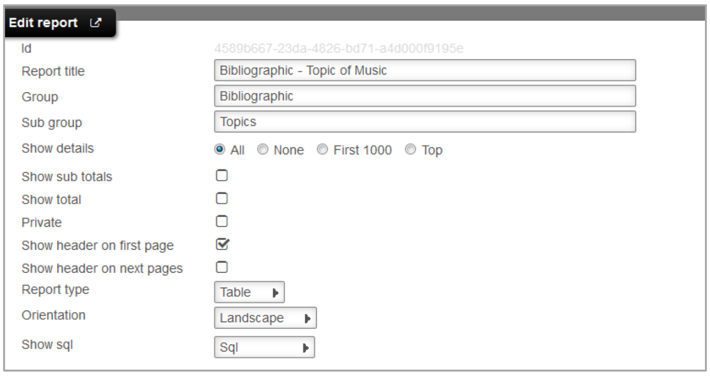
Skills outlined in this Sample – *Getting Data from a File*

First create a File within Amlib on a Topic. This could be done via a Keyword search within Stockitem and then Xreference to Catalogue and save as a File

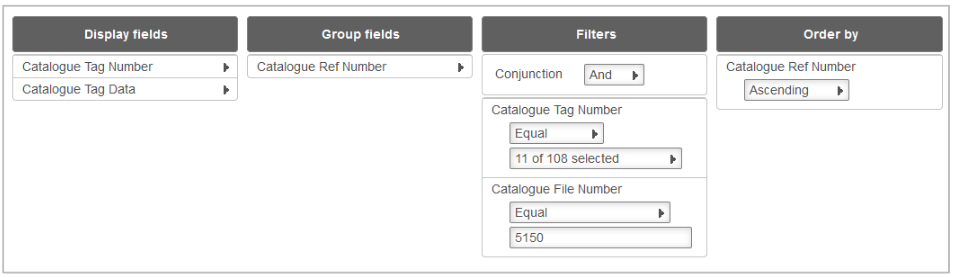
Take note of the File No. This could be used within the Filter of OpenReports



1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display



4. Enter a **Report Title** in the Report Title section. For the sample for example "**Topic of Music**"
5. Enter a **Group** since we want to find it later easily – for example **Bibliographic**
6. Enter a **Sub Group** – for example **Topic**
7. **Show details:** For this sample Report we will set to ALL
8. **Show Sub totals**: leave this **unticked**.
9. **Show total:** leave this **unticked**.
10. **Tick Private**: leave this **unticked**.
11. **Show header on first page**: This is your choice. We can have this **ticked**
12. **Show header on next pages**: This is your choice. But for now leave this **unticked**
13. Choose **Report Type** from the Drop-down options (Table is default):
    - **Table** – set out in rows and columns (select for the sample) We will test it as a Table and then change it to graph when we are happy with the results
14. Select **Orientation**
    - **Landscape** (select for the sample)
15. Leave **Show sql**



Display Fields

1. *Select* the Bibliographic **Entity**
2. *Drag and drop* Catalogue Tag Number and Catalogue Tag Data into the Display
3. Fields Column

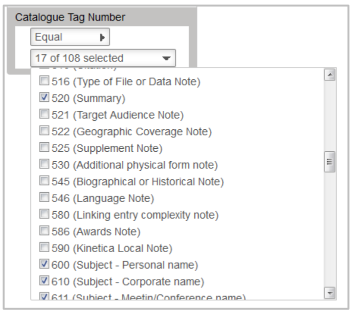
Group Fields

1. *Drag and drop* the **Cat Ref Number** to the Group Fields table

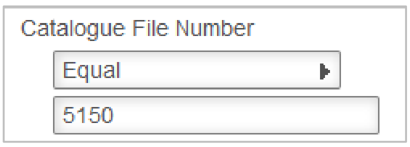
Filter

The Filter can be selected to target a File previously saved into Amlib. The File Number is the best Filter to choose as it is Unique

1. Drag and drop **Catalogue Tag Number** to the **Filters** Column
2. Select **Equal to**
3. Select the **Tag Number** that will display in the Display from the drop-down option. This is up to you but may include 082 (Call No), 100 (Main Author), 245 (Title), 520 (Notes), any 600 Subject headings



4. Drag and drop **Catalogue File Number** to the Filter column
5. Select **Equal to**
6. Enter the **File Number**

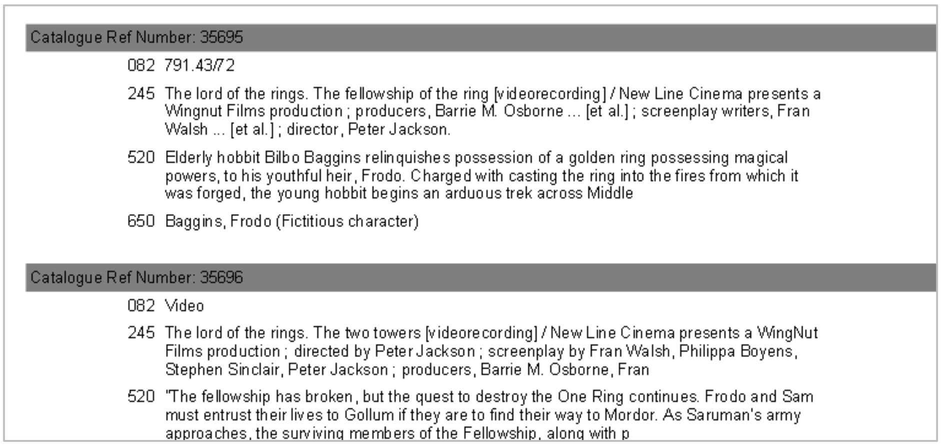


Order By

Drag and drop Catalogue Ref Number to the Order by Column. Leave as Ascending

Preview

Select **Preview** to view the Report



Catalogue Ref Number: 35695

082 791.43/72

245 The lord of the rings. The fellowship of the ring [videorecording] / New Line Cinema presents a Wingnut Films production ; producers, Barrie M. Osborne ... [et al.] ; screenplay writers, Fran Walsh ... [et al.] ; director, Peter Jackson.

520 Elderly hobbit Bilbo Baggins relinquishes possession of a golden ring possessing magical powers, to his youthful heir, Frodo. Charged with casting the ring into the fires from which it was forged, the young hobbit begins an arduous trek across Middle

650 Baggins, Frodo (Fictitious character)

Catalogue Ref Number: 35696

082 Video

245 The lord of the rings. The two towers [videorecording] / New Line Cinema presents a WingNut Films production ; directed by Peter Jackson ; screenplay by Fran Walsh, Philippa Boyens, Stephen Sinclair, Peter Jackson ; producers, Barrie M. Osborne, Fran

520 "The fellowship has broken, but the quest to destroy the One Ring continues. Frodo and Sam must entrust their lives to Gollum if they are to find their way to Mordor. As Saruman's army approaches, the surviving members of the Fellowship, along with p

Save

Once the Report is successful, select **Save** to be available in the Report Viewer as a graph

BORROWER ENTITY – BORROWER LIST WITH EMAIL ADDRESSES

Skills outlined in this Sample –*Filtering, Group Fields*

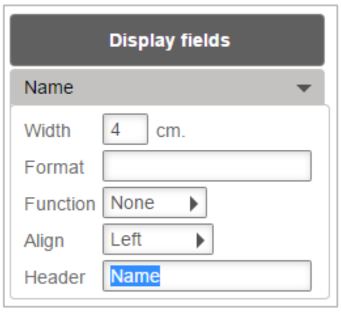
1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

3. Enter a **Report Title** in the Report Title section. For the sample we can give a Title of "**Borrower List - Emails**"
4. Enter a **Group** if the Reports are to be grouped logically together so they can be found easier in Report Viewer and Designer. For example **Borrower**
5. Enter a **Sub Group** if the Reports are going to be grouped further together by a secondary classification. For example **List**
6. **Show details**: For this sample Report we will leave as the Defaults
   - **All**: Shows the break-down of details within the Fields
7. **Show Sub totals**: For the sample leave this **unticked**.
8. **Show total:** For the sample leave this **unticked**.
9. **Private**: For our sample leave this **unticked**.
10. **Show header on first page.** For our sample leave this **ticked**
11. **Show header on next pages.** For our sample leave this **unticked**
12. Choose **Report Type** from the Drop-down options (Table is default):
    - **Table** – set out in rows and columns (select for the sample)
13. Chart – if set to chart there are many options in relation to what
14. Select **Orientation**
    - **Landscape** (select for the sample)
    - Portrait

Display Fields

1. Highlight the **Borrower Entity** from the **Entities / Data Fields**
2. Drag and drop **Full Name - Surname, Given**
3. Drag and drop **Borrower Email** into the **Display Fields** Table
4. Changing the Header could be useful to simplify the Report layout

   For the sample change the Full Name-Surname, Given Header to simply Name Borrower



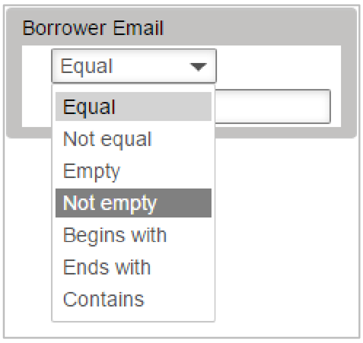
1. Continue to drag other **Data Fields** as required
2. Select **Back** to return to the Report Designer

Filter

It may be necessary to filter the Report to target certain Borrowers and their Email

In the Sample we will list only those Borrowers with Emails

1. Return to **Report Designer**
2. Select the **Borrower Entity**
3. Select **Borrower Email** Data Field
4. Drag this Field over to the Filter By Section
5. Select **Not empty** from the Drop-down Options

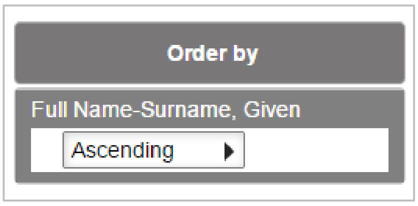


Order by

It is useful to have an Order sequence to ensure it orders correctly

Note: Make sure the Order is one of the Data Fields within the Display or Group Columns. If a Group column exists, it is logical to have it ordered by that Data Field first

1. Drag and drop **Data Fields** over to the **Order by** section
2. Select either **Ascending** or **Descending** from the drop-down box
3. In the sample report it is useful to Order it by **Full name – Surname, Given** in **Ascending** Order



Name	Borrower Email
Abraham, Sabrina	sabrina.johnston@librarytown.net
Adams, Cameron	cameron.hand@librarytown.net
Adams, Shaeia	shaeia.adams@librarytown.net
Adams, Taylah	taylah.adams@librarytown.net
Addison-Edgar, Keyshiaa	keyshiaa.ae@librarytown.net
Adey, Joshua	joshua.adey@librarytown.net

Save

Once the Report is successful it is useful to **Save** it to be available in the Report Viewer, so that the report can be used in the future

Report Viewer

The same report now displays in **Report Viewer**

BORROWER ENTITY - COUNT OF NEW BORROWERS WITHIN A TIME FRAME

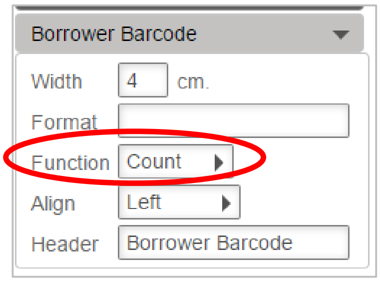
Skills outlined in this Sample – Getting **Subtotals** and **Totals,** Choosing not to Display the details, Change the alignment to be Right rather than Left, selecting a date from the Calendar

1. Select **New** from the buttons of the Report Designer
2. The **Edit Report** Window will display

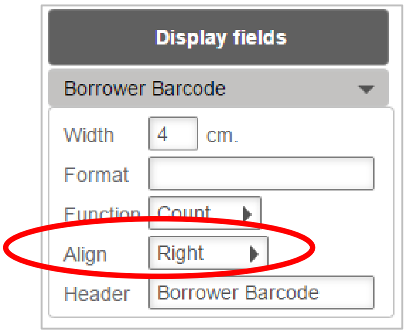
3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of “**New borrowers joined this year**”
4. Enter a **Group** if the Reports for example **Borrower**
5. Enter a **Sub Group** for example **Count**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show Sql**
9. **Show details**: For this sample Report we will leave as the Defaults
   - **None**: Shows the numbers for the results but not the details within the Report. Fields will be hidden
10. Show Sub totals if a calculation based on Groups is required (Default is unticked). For the sample **tick** this
11. Show total if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
12. Tick Private For our sample leave this **unticked**.
13. Show header on first page. For our sample leave this **ticked**
14. Show header on next pages. For our sample leave this **unticked**

Display Fields

1. Highlight the **Entity** from the **Entities / Data Fields**
2. For this sample, select the entity of **Borrower**
3. Drag and drop **Borrower Barcode** into the **Display Field Table**, which will Count the Nos of Barcodes entered since the Date in the Filter
4. Select on the **Borrower Barcode** to make the Function Count



5. Also since the Function will be **Count** it is good to have the figures aligned to the Right to display better

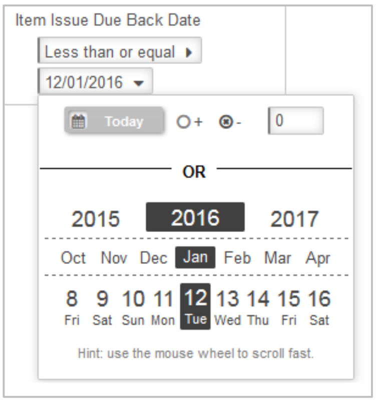


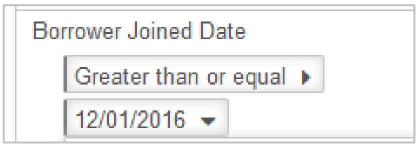
Group

1. Highlight the **Borrower Entity** from the **Entities/Data fields** column
2. Drag and drop **Borrower Type** to the **Group fields** column which will base the Count on Borrower Type

Filter

1. Return to **Report Designer**
2. Select the **Borrower Entity**
3. Drag and drop **Borrower Joined Date** to the Filter
4. Select **Greater than or equal to** from the Drop-down Options
5. Select the **Date** from the Calendar. See information on using the Calendar later in the Guide

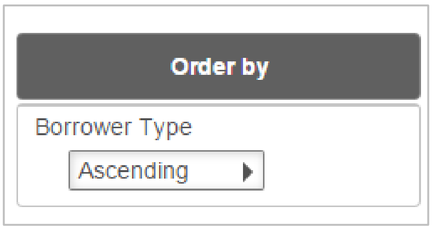




Order by

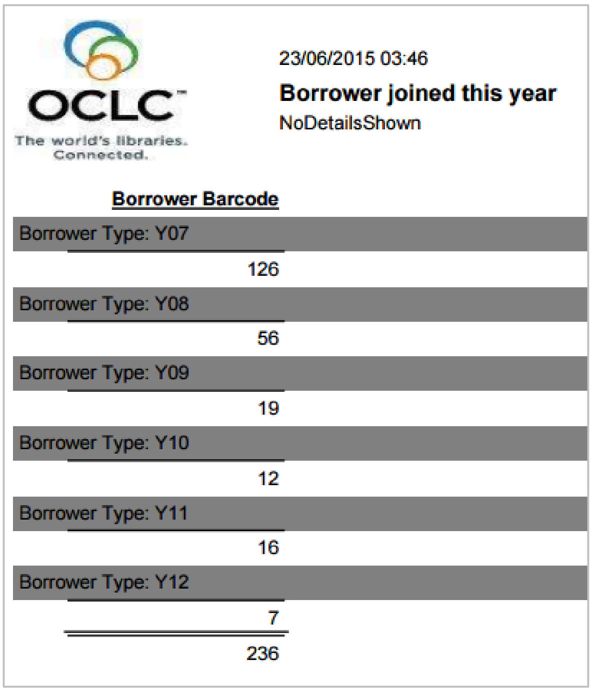
It is useful to have an Order sequence to ensure it orders correctly

1. Drag and drop **Borrower Type** over to the **Order by** section
2. Select **Ascending** from the drop-down box



Preview

1. *Select* **Preview** to view the Report



Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

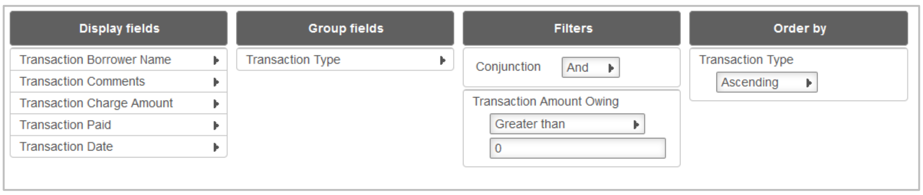
BORROWER FINANCIAL ENTITY – OWING MONEY BY FINANCIAL TYPE

The Entity to select will depend on whether Double Line Accounting is being used or not. The Database Fields will be different depending on which mode is being run. To find out which mode is being run, see Appendix 1 under Borrower Financials

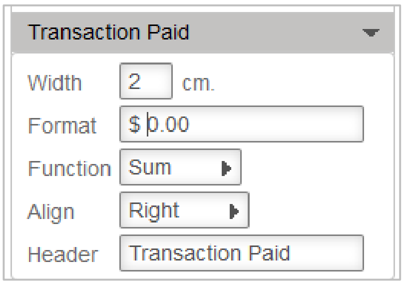
1. Select **New** from the buttons of the Report Designer
2. The **Edit Report** Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Owing money**"
4. Enter a **Group** if the Reports for example **Financials**
5. Enter a **Sub Group** for example **Borrowers**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details:** For this sample Report we will leave as the Defaults
   - **All**: To display all the details
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **tick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
12. Tick **Private** For our sample leave this **unticked**.
13. Show header on first page. For our sample leave this **ticked**
14. Show header on next pages. For our sample leave this **unticked**

Display Fields



1. Highlight the **Entity** from the **Entities / Data Fields**
2. For this sample, select the entity of **Borrower Financial – Single Entry**
3. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have **Transaction Borrower Name**, **Transaction comments**, **Charge amount, paid and date**
4. Change the **Function** to **$** amounts if required



Group

1. Highlight the **Borrower Financial Entity** from the **Entities/Data fields** column
2. Drag and drop **Transaction Type** to the **Group fields** column which will base the Report by Transaction Type

Filter

1. Return to **Report Designer**
2. Select the **Borrower Financial Entity**
3. Drag and drop **Transaction Amount Owing** to the Filter
4. Select **Greater than** from the Drop-down Options
5. Enter **0.00** or the relevant amount for the report

Order by

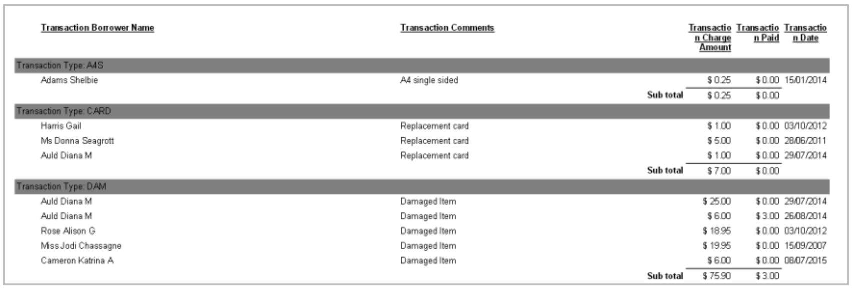
It is useful to have an Order sequence to ensure it orders correctly

1. *Drag and drop* **Transaction Type** over to the Order by section
2. Select **Ascending** from the drop-down box

Preview

Select **Preview** to view the Report

Note: It would be a good idea to alter the Headings as they are wrapping and making them hard to read



Transaction Borrower Name	Transaction Comments		Transactio n Charge Amount	Transactio n Paid	Transactio n Date
Transaction Type: A4S					
Adams Shelbie	A4 single sided		$ 0.25	$ 0.00	15/01/2014
		Sub total	$ 0.25	$ 0.00	
Transaction Type: CARD					
Harris Gail	Replacement card		$ 1.00	$ 0.00	03/10/2012
Ms Donna Seagrott	Replacement card		$ 5.00	$ 0.00	28/06/2011
Auld Diana M	Replacement card		$ 1.00	$ 0.00	29/07/2014
		Sub total	$ 7.00	$ 0.00	
Transaction Type: DAM					
Auld Diana M	Damaged Item		$ 25.00	$ 0.00	29/07/2014
Auld Diana M	Damaged Item		$ 6.00	$ 3.00	26/08/2014
Rose Alison G	Damaged Item		$ 18.95	$ 0.00	03/10/2012
Miss Jodi Chassagne	Damaged Item		$ 19.95	$ 0.00	15/09/2007
Cameron Katrina A	Damaged Item		$ 6.00	$ 0.00	08/07/2015
		Sub total	$ 75.90	$ 3.00	

Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

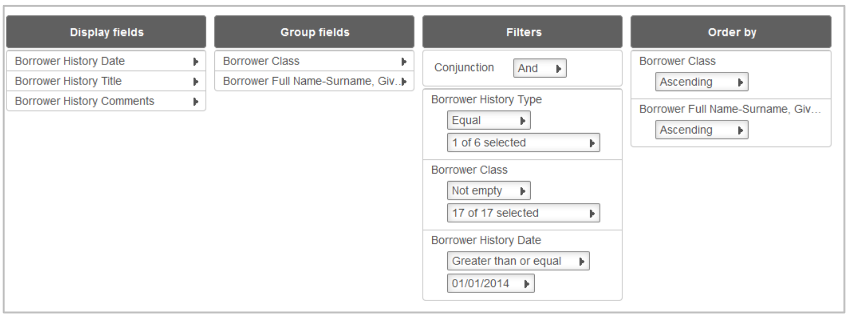
BORROWER HISTORY ENTITY - HISTORY BY CLASS

The Entity to select will depend on whether the Borrower Type keeps Borrower Reading History. It may be better to run the report from the Stock History to view the Item Return history for each Borrower or Borrower Class.

1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Borrower History by Class**"
4. Enter a **Group** if the Reports for example **Borrower History**
5. Enter a **Sub Group** for example **Class**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details:** For this sample Report we will leave as the Defaults
   - **All**: To display all the details
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **tick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
12. Tick **Private** For our sample leave this **unticked**.
13. **Show header on first page.** For our sample leave this **ticked**
14. **Show header on next pages.** For our sample leave this **unticked**

Display Fields



1. Highlight *the* **Borrower History Entity** from the **Entities / Data Fields**

2. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have Borrower History Date and Borrower History Title

Group

1. Highlight the **Borrower History Entity** from the **Entities/Data fields** column
2. Drag and drop **Borrower Class** to the **Group** field's column which will base the Report by Class. Also drag and drop **Borrower Full Name – Surname, Given** to the **Group** fields column

Filter

1. Select the **Borrower History Entity**
2. Drag and drop **Borrower History Type** to the Filter
3. Select **Equal** and select the **History type** (e.g. READING) from the Drop-down Options
4. Drag and drop **Borrower Class** to the Filter. Select the Classes from the Drop-down list
5. Drag and drop **Borrower History Date** to the Filter.
6. Select **Greater than or Equal** and select a date from the Calendar (or choose Today – xx days)

Order by

It is useful to have an Order sequence to ensure it orders correctly

1. Drag and drop **Borrower Class** over to the **Order by** section
2. Select **Ascending** from the drop-down box

Preview

Select **Preview** to view the Report

Borrower Full Name-Surname, Given	Borrower History Date	Borrower History Title	Borrower History Comments
Borrower Class: 1B			
Atkinson, Andrew	12/02/2015	FIFTH HORSEMAN NATHAN M ADAMS ADAMS NATHAN M	
Borrower Class: 2A			
Frost, Taylor	10/01/2014	DARK MOON DAVID GEMMELL GEMMELL DAVID A	
Cameron, Katrina	20/08/2014	BETTER HOMES AND GARDENS DECEMBER 2012	
Cameron, Katrina	21/07/2014	LITTLE COFFEE SHOP OF KABUL DEBORAH RODRIGUE RODRIGUEZ DEBORAH	
Fenton, Diana	21/07/2014	HARRY POTTER AND THE CHAMBER OF SECRETS J K ROW ROWLING J K 1965	
Frost, Taylor	15/06/2015	READING BOX MUSIC	
Bosak, Jackson	18/06/2015	KITE AND CAITLIN ROGER MCGOUGH MCGOUGH ROGER 1937	
Cameron, Katrina	08/07/2015	ACCIDENTAL BILLIONAIRES ELECTRONIC RESOURCE MEZRICH BEN	
Frost, Taylor	15/06/2015	READING BOX MUSIC	
Frost, Taylor	15/06/2015	READING BOX MUSIC	
Borrower Class: 2B			
Curran, Kaitlin	25/08/2014	CULINARIA EUROPEAN SPECIALTIES JOACHIM ROMER ET AL CHIEF EDITORS	
Curran, Kaitlin	25/08/2014	CULINARIA EUROPEAN SPECIALTIES JOACHIM ROMER ET AL CHIEF EDITORS	
Curran, Kaitlin	25/08/2014	CULINARIA EUROPEAN SPECIALTIES JOACHIM ROMER ET AL CHIEF EDITORS	
Hardy, Maureen	08/07/2015	AUSTRALIAS WAR 1939 1945 EDITED BY JOHN BEAUMONT	
Frost, Melissa	11/06/2015	HARRY POTTER AND THE CHAMBER OF SECRETS J K ROW ROWLING J K 1965	
Patchett, Sarah	08/07/2015	DOGS CAN SIGN TOO A BREAKTHROUGH METHOD FOR TEA SENECHAL SEAN	
Curran, Kaitlin	21/08/2014	LIFE IN ANCIENT EGYPT	
Curran, Kaitlin	21/08/2014	LIFE IN ANCIENT EGYPT	
Curran, Kaitlin	21/08/2014	RIVER GOD WILBUR SMITH SMITH WILBUR 1933	

Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

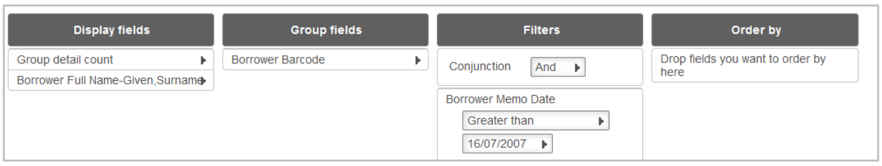
COUNTER ENTITY – BORROWER MEMOS BY BARCODE

The Counter can be used for any Entity to include a Count on the Group Field. In this sample, it will count the Number of Memos for each Barcode giving the name of the Borrower and the Number of Memos

1. Select **New** from the buttons of the *Report Designer*
2. The Edit Report Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Borrower Memos"**
4. Enter a **Group** if the Reports for example **Borrower**
5. Enter a **Sub Group** for example **Memos Count**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details:** For this sample Report we will leave as the Defaults
   - **All**: To display all the details
15. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **tick** this
16. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
17. Tick **Private** For our sample leave this **unticked**.
18. **Show header on first page**. For our sample leave this **ticked**
19. **Show header on next pages**. For our sample leave this **unticked**

Display Fields



1. Highlight the **Counter Entity** from the **Entities / Data Fields**
2. Drag and drop **Group Details Count** into the Display Field Column
3. Highlight the Borrower **Entity** from the **Entities / Data Fields**
4. In this sample we have **Borrower Full Name - Given, Surname**

Group

1. Highlight the **Borrower Entity** from the **Entities/Data fields** column
2. Drag and drop **Borrower Barcode** to the **Group fields** column which will base the Count on Memos per Barcode

Filter

1. Select the **Borrower Entity**
2. Drag and drop **Borrower Memo Date** to the Filter
3. Select **Greater than** from the Drop-down Options
4. Enter the required date from the Calendar

Order by

It is useful to have an Order sequence if required

Preview

1. *Select* **Preview** to view the Report

	Group detail count	Borrower Full Name-Given,Surname	Borrower Barcode
	1	Fabrice Eby	41057
	1	Brayden Cavill	ADEYBR
	9	Huang	B002
	2	Simon Wilson	B233
	1	Alf Reeves	B240
	1	Greg Brown	B244
	3	Alexander Schreck	B251
	1	Leeanne Harris	B264
	6	Diana Fenton	B27912345678
	1	Gail Kirk	B281
	1	Melissa Frost	B302
	3	Jemma Hailwood	B304
	1	Kirsty Weir	B351
	2	Robyn Miller	B352
	1	Nikkea Smith	B388
	1	Hannah Rowcroft	B7001
	1	Marnie Husain	B864
	7	John Hunt	B9999
	1	Megan Patchett	KENSHOLMEGAN
Total	19		

Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

CURRENT LOANS ENTITY – OVERDUES

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section. For the sample we can give a Title of "**Overdues**".
5. Enter a **Group** since we want to find it later easily – for example **Current Loans**
6. Enter a **Sub Group** – for example **Overdues**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show Sql**
10. **Show details**: For this sample Report we will leave as the Defaults
    - **All**: Shows the break-down of details within the Fields (Default)
11. **Show Sub totals:** Can be **ticked** if required
12. **Show total:** leave this **unticked**
13. Tick **Private**: leave this **unticked**
14. **Show header on first page:** For our sample **tick** this one!
15. **Show header on next pages**: This is your choice. But for now leave this **unticked**

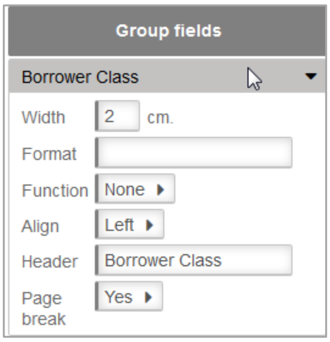
Display Fields

1. Highlight the required **Entity** from the **Entities / Data Fields**
2. **Drag and drop** into the Display Field Table Item Fields from the **Stockitem** Entity – Item Title, Item Call No etc.
3. **Drag and drop** into the **Display Field** Table required Fields from the **Current Loans** Entity – Issue Due Back Date etc.

Group Fields

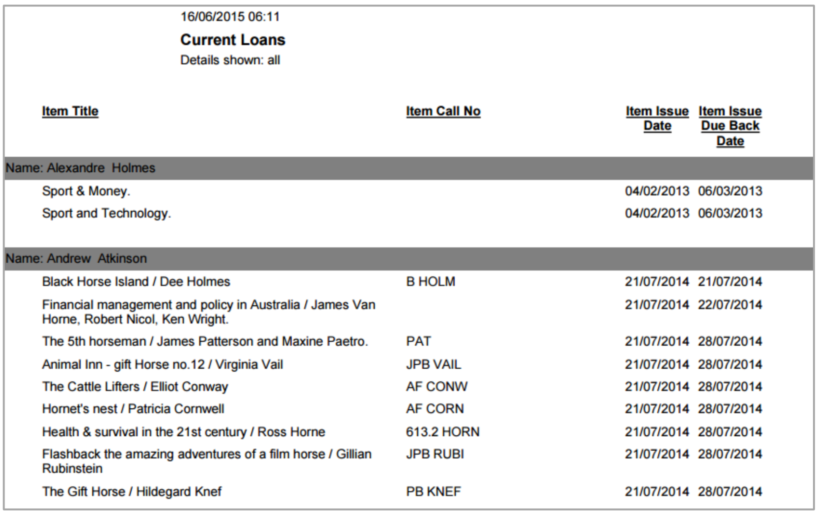
It is possible to Group the Report by Borrower Class or Type, as well as the Borrower name etc.

1. Add **Borrower Class** or **Type** to the Group fields
2. Add the **Full Name-Surname, Given Field** to the **Group Fields** table
3. It is possible to decide if you want a Page break for the Group field. For our Sample select **Yes**



4. **Preview** the report again to see the changes. The Borrower's name no longer repeats

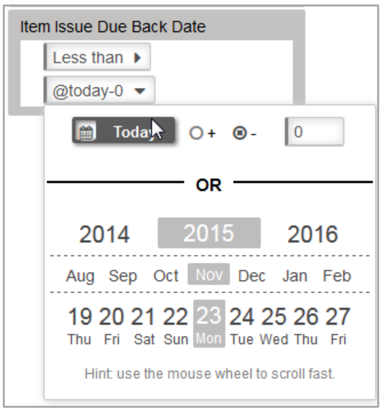
Note: The Grouped Fields display as shadowed Text on the report, making it stand out


16/06/2015 06:11
Current Loans
Details shown: all

Item Title	Item Call No	Item Issue Date	Item Issue Due Back Date
Name: Alexandre Holmes			
Sport & Money.		04/02/2013	06/03/2013
Sport and Technology.		04/02/2013	06/03/2013
Name: Andrew Atkinson			
Black Horse Island / Dee Holmes	B HOLM	21/07/2014	21/07/2014
Financial management and policy in Australia / James Van Horne, Robert Nicol, Ken Wright.		21/07/2014	22/07/2014
The 5th horseman / James Patterson and Maxine Paetro.	PAT	21/07/2014	28/07/2014
Animal Inn - gift Horse no.12 / Virginia Vail	JPB VAIL	21/07/2014	28/07/2014
The Cattle Lifters / Elliot Conway	AF CONW	21/07/2014	28/07/2014
Hornet's nest / Patricia Cornwell	AF CORN	21/07/2014	28/07/2014
Health & survival in the 21st century / Ross Horne	613.2 HORN	21/07/2014	28/07/2014
Flashback the amazing adventures of a film horse / Gillian Rubinstein	JPB RUBI	21/07/2014	28/07/2014
The Gift Horse / Hildegard Knef	PB KNEF	21/07/2014	28/07/2014

Filter

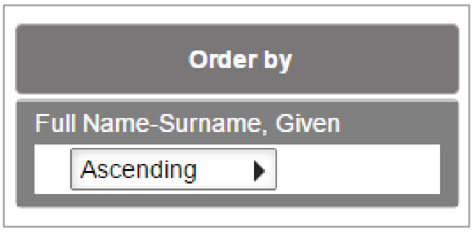
1. To **filter** by All overdues select **Item Issue Due Back Date** from the **Current Loans Entity**
2. Select **Less than**
3. Select **Today** for the date to get all Overdues



Order by

It is not essential to have an Order because the Groups are already filtering the Data and will automatically display in **ascending** order. However it may be useful to have an Order sequence if the Order is to be descending or not as presented automatically

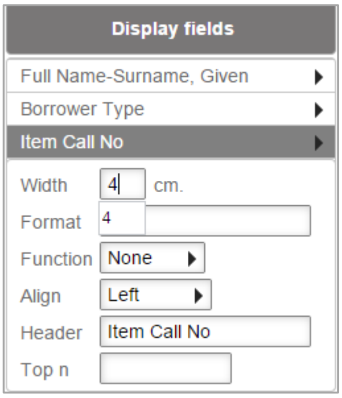
1. Drag and drop **Data Fields** over to the Order by section
2. Select either **Ascending** or **Descending** from the drop-down box
3. In the sample report it is useful to Order it by Class and then **Full name – Surname, Given** in Ascending Order



Width

For the sample, notice the Call No had lots of space but the Title was sometimes a bit cramped. It is possible to change the width of the **Call No Field** and Title

1. Return to **Report Designer**
2. Select on the **Item Call No** Field
3. Options will display



4. Change the **Width** from 6cms to 4cms
5. Select out of the box
6. Change the **Title width** too, to make it from 8cms to 15cms in the same way
7. **Preview** the report again to see the changes. There is now less space taken up by the Item Call No and the Item Title does not wrap so much

Save

Once the Report is successful it is useful to **Save** it to be available in the Report Viewer

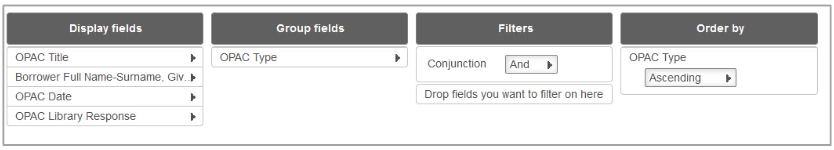
OPAC REQUEST & SUGGEST ENTITY - NEW REQUESTS

The Entity is showing which Items have been requested via NetOpacs or OpenOPAC for requests to purchase or to receive via Inter Library Loan and queries what have been entered within the Supervisor/Opac/Opac Suggests

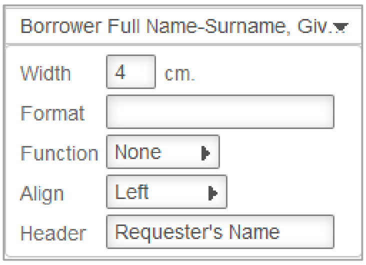
1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Opac Requests**"
4. Enter a **Group** if the Reports for example **Opac**
5. Enter a **Sub Group** for example **Requests**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. Show details: For this sample Report we will leave as the Defaults
   - **All**: To display all the details
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **untick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **untick** this
12. **Private** For our sample leave this **unticked**.
13. **Show header on first page**. For our sample leave this **ticked**
14. **Show header on next pages**. For our sample leave this **unticked**

Display Fields



1. Highlight the **Opac Requests or Suggests** Entity from the **Entities / Data Fields**
2. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have OPAC Title, Opac Date and Opac Library Response
3. Highlight the **Borrower** Entity from the **Entities / Data Fields**
4. Drag and drop **Borrower Full Name – Surname, Given** (or required name field/s) into the Display Field Column at the required level for display
5. Change the **Header** to **Requester's Name** (or what is required) by Selecting on this Field once



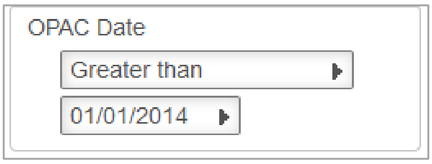
Note: The Format Field will be different depending if the Data Field comes from Netopacs or OpenOPAC

Group

There will be no Group for this report

Filter

1. Return to **Report Designer**
2. Select the **Opac Requests or Suggests** Entity
3. Drag and drop **OPAC Date** to the Filter
4. Select **Greater than** from the Drop-down Options
5. Select **a date** from the **Calendar** or use the **Current Date – x days**



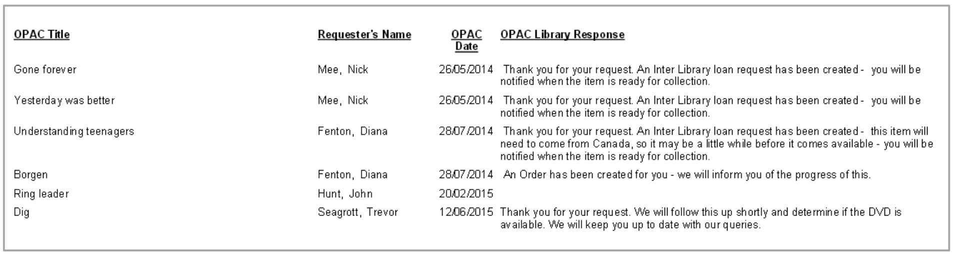
Order by

There can be an order if required. In this sample there is no Order selected

Preview

Select **Preview** to view the Report

Note: The OPAC Title could be made narrower and the OPAC Library Response wider so that it fits better on the page



OPAC Title	Requester's Name	OPAC Date	OPAC Library Response
Gone forever	Mee, Nick	26/05/2014	Thank you for your request. An Inter Library loan request has been created - you will be notified when the item is ready for collection.
Yesterday was better	Mee, Nick	26/05/2014	Thank you for your request. An Inter Library loan request has been created - you will be notified when the item is ready for collection.
Understanding teenagers	Fenton, Diana	28/07/2014	Thank you for your request. An Inter Library loan request has been created - this item will need to come from Canada, so it may be a little while before it comes available - you will be notified when the item is ready for collection.
Borgen	Fenton, Diana	28/07/2014	An Order has been created for you - we will inform you of the progress of this.
Ring leader	Hunt, John	20/02/2015	
Dig	Seagrott, Trevor	12/06/2015	Thank you for your request. We will follow this up shortly and determine if the DVD is available. We will keep you up to date with our queries.

Save

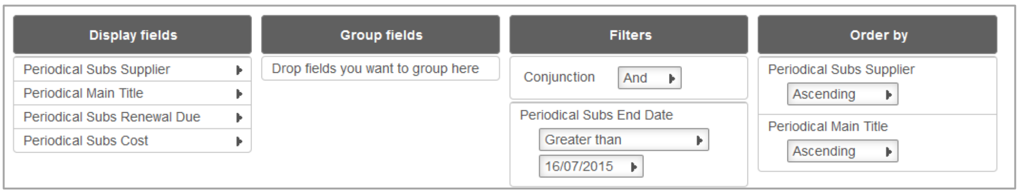
Once the Report is successful, save so it can be used again in the Viewer or Designer

PERIODICAL ENTITY - MAGAZINES CURRENTLY SUBSCRIBED

1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Current Main Entries with Cost**"
4. Enter a **Group** if the Reports for example **Periodicals**
5. Enter a **Sub Group** for example **Current subscriptions**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave Show sql
9. **Show details:** For this sample Report we will leave as the Defaults
   - **All**: To display all the details or leave as First 1000 if it will list all Main entries at first 1000
16. Show **Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **untick** this
17. Show **total** if a Total calculation of the Sub totals is required (Default is unticked). For this sample **untick** this
18. **Private:** For our sample leave this **unticked**.
19. **Show header on first page.** For our sample leave this **ticked**
20. **Show header on next pages**. For our sample leave this **unticked**

Display Fields



1. Highlight the **Periodicals** Entity from the **Entities / Data Fields**
2. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have Periodical Subs Supplier, Periodical Main Title, Periodicals Renewal Due, Periodical Subs Cost

Group

There will be **no Group** for this report. However it could be useful to Group by Supplier instead of having it in the Display fields

Filter

1. Select the **Periodicals** Entity
2. Drag and drop **Periodical Subs End Date** to the Filter
3. Select **Greater than** from the Drop-down Options
4. Select **Today** from the **Calendar**

Order by

There can be an order if required. In this sample the Order is Periodical Subs Supplier and Periodical Main Title

Preview

Select **Preview** to view the Report

Periodical Subs Supplier	Periodical Main Title	Periodical Subs Renewal Due	Periodical Subs Cost
BT	Centre for Strategic Education : Seminar Series [magazine]	10/09/2016	390.00
DYM	Better homes and gardens.	01/06/2016	144.00
DYM	Gardening Australia magazine	05/10/2016	48.00
JAMBEN	Waves.	01/11/2016	144.00
MARS	Great walks	20/11/2015	150.00
WALS	Wheels	01/11/2015	144.00

Save

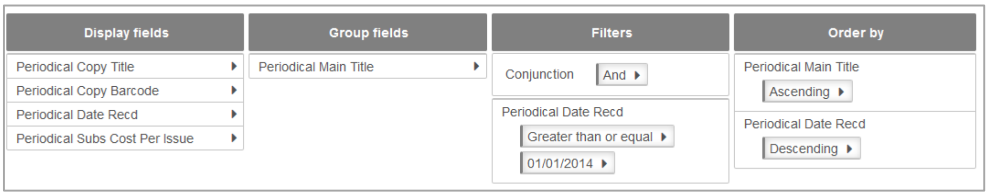
Once the Report is successful, save so it can be used again in the Viewer or Designer

PERIODICAL ENTITY – COPIES RECEIVED SINCE A CERTAIN DATE

1. Select **New from the buttons of the *Report Designer***
2. **The Edit Report** Window will display

3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**List of Copies received"**
4. Enter a **Group** if the Reports for example **Periodicals**
5. Enter a **Sub Group** for example **Copies Received**
6. Choose **Report Type** from the Drop-down options (Table is default):
15. **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details**: For this sample Report we will leave as the Defaults
   - **All**: To display all the details
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **untick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **untick** this
12. **Private**. For our sample leave this **unticked**.
13. **Show header on first page.** For our sample leave this **ticked**
14. **Show header on next pages.** For our sample leave this **unticked**

Display Fields



1. Highlight the **Periodicals** Entity from the **Entities / Data Fields**
2. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have Periodical Copy Title, Periodical Copy Barcode, Periodicals Date Recd, Periodical Subs Cost per Issue

Group

Drag and drop **Periodical Main Title** to the **Group fields** column

Filter

1. Select the **Periodicals** Entity
2. Drag and drop **Periodical Date Received** to the Filter
3. Select **Greater than or Equal** from the Drop-down Options
4. Select the required **Date** from the **Calendar.** It is also possible to add a Less than or equal to date to make it a range of dates

Order by

There can be an order if required.

For the Sample, Periodical Main Title (Ascending) and Periodical Date Recd (Descending) so the copies most current show first

Preview

Select **Preview** to view the Report

Note: The Headings can be made wider so that they look better

Periodical Copy Title	Periodical Copy Barcode	Periodical Date Recd	Periodical Subs Cost Per Issue
Periodical Main Title: Better homes and gardens.			
June 2015	STOCK00484164B	04/05/2015	$ 6.00
May 2015	STOCK00484172B	04/05/2015	$ 6.00
Periodical Main Title: Gardening Australia magazine			
Sep 2015	STOCK00491217B	05/10/2015	$ 4.00
Aug 2015	STOCK00491209B	05/10/2015	$ 4.00
Jul 2015	STOCK00491195B	05/10/2015	$ 4.00
Periodical Main Title: Great walks			
Vol. 15 No. 5, Sep-Oct 2015	STOCK00490822B	26/08/2015	$ 12.50
Vol. 15 No. 4, Jul-Aug 2015	STOCK00490814B	24/08/2015	$ 12.50
Vol. 15 No. 3, May-Jun 2015	STOCK00490806B	24/08/2015	$ 12.50
Vol. 15 No. 2, Mar-Apr 2015	STOCK00490792B	24/08/2015	$ 12.50
Vol. 15 No. 1, Jan-Feb 2015	STOCK00490784B	24/08/2015	$ 12.50

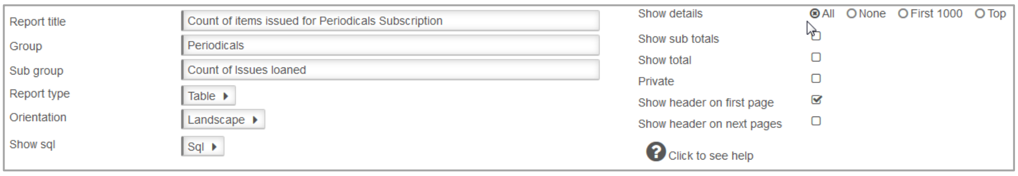
Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

PERIODICAL ENTITY - ITEMS BORROWED

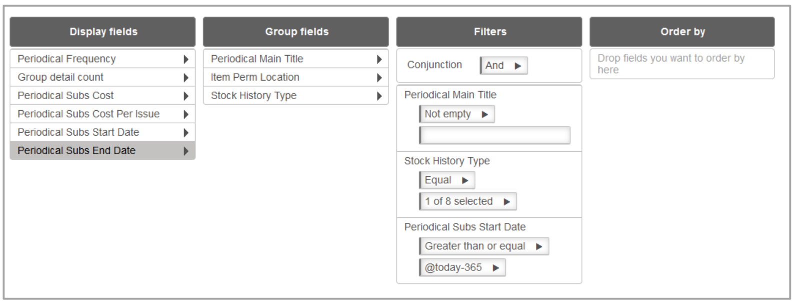
SINCE THEY HAVE BEEN RECEIVED FOR CURRENT SUBSCRIPTION

1. Select **New** from the buttons of the Report Designer
2. The **Edit Report** Window will display



3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Count of Items issued for Periodicals – Most recent Subscription**"
4. Enter a **Group** if the Reports for example **Periodicals**
5. Enter a **Sub Group** for example **Count of Issues per Main Periodical**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select ***Orientation***
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details:** For this sample Report we will leave as the Defaults
   - **All**: To display all the details
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample leave as **unticked**
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample leave as **unticked**
12. **Private.** For our sample leave this **unticked**.
13. **Show header on first page.** For our sample leave this **ticked**
14. **Show header on next pages**. For our sample leave this **unticked**

Display Fields



1. Highlight the **Periodicals** Entity from the **Entities / Data Fields**
2. Drag and drop **the required Data Fields** into the **Display Field** Column. In this sample we have Periodical Frequency, Periodical Subs Cost, Per Subs Cost Per Issue, Periodical Subs Start Date and Periodical End Date and/or other details required
3. Highlight the **Counter** Entity

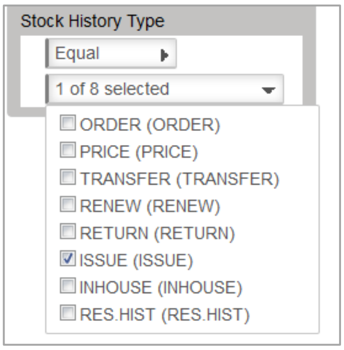
4. Drag and drop the **Group detail** Count to the **Display Fields**
5. It is possible at this stage to alter Headings or Formats of the Display field as required

Group

1. From the Periodicals Entity, drag and drop **Periodical Main Title** to the **Group fields** column
2. From the Stockitem Entity, drag and drop **Item Perm Location** to the **Group fields** column
3. From the Stock History Entity, drag and drop **Stock History Type** to the **Group fields** column
4. It will be the last one of the Group fields that the Counter will add

Filter

1. Select the **Periodical** Entity
2. Drag and drop **Periodical Main Title** to the Filter
3. Make the Filter **Not Empty** to ensure that you report on just those records
4. Select the **Stock History** Entity
5. Drag and drop **Stock History Type** to the Filter
6. Select Equal and ensure **ISSUE (or RETURN)** is selected, depending on what is required



7. Select the **Periodical** Entity
8. Drag and drop **Subs Start Date** to the **Filter**
9. Select **Greater than or Equal** from the Drop-down Options
10. Select the required **Date** from the **Calendar**. In this sample we have chosen **Today – 365** to get the Subscriptions started a year ago to report on. It is also possible to select a range of dates

Order by

There can be an order if required

Save

The Report can be saved so it can be used again in the Viewer or Designer

Preview

Select **Preview** to view the Report

26/08/2015 05:26

Count of Items Issued for Periodicals - Most recent Subscription

Details shown: all

Periodical Frequency	Group detail count	Periodical Subs Cost	Periodical Subs Cost Per Issue	Periodical Subs Start Date	Periodical Subs End Date	Stock History Type
Periodical Main Title: Better homes and gardens.						
Item Perm Location: CHELSEA						
M	1	144.00	6.00	01/05/2015	30/04/2017	ISSUE
Periodical Main Title: Great walks						
Item Perm Location: CHELSEA						
BM	3	150.00	12.50	01/01/2015	31/12/2016	ISSUE
Periodical Main Title: Waves.						
Item Perm Location: CHELSEA						
Q	2	144.00	9.00	01/01/2015	31/12/2016	ISSUE
Item Perm Location: HASTINGS						
Q	3	144.00	9.00	01/01/2015	31/12/2016	ISSUE

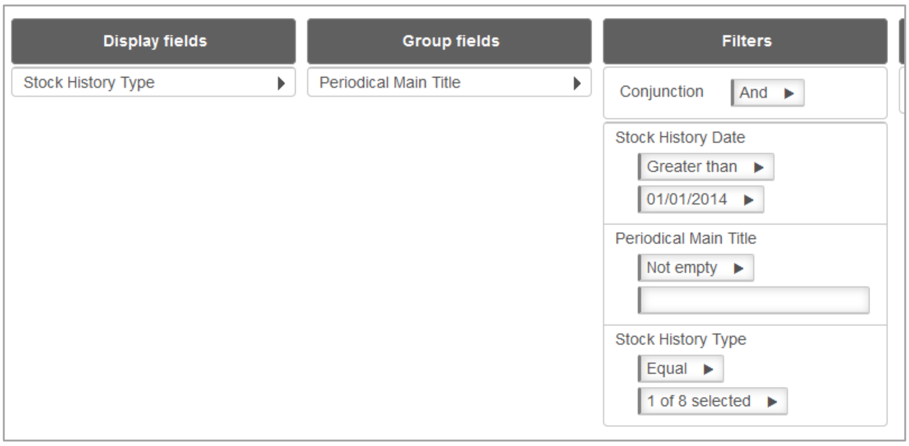
PERIODICAL ENTITY – ITEMS BORROWED

ALL SUBSCRIPTIONS – COUNT ONLY

1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

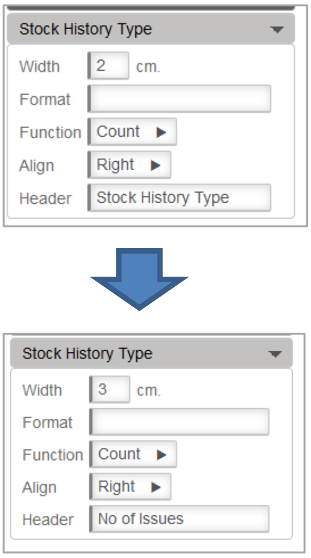
3. Enter a **Report Title in** the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Periodicals – Loans**"
4. Enter a **Group** if the Reports for example **Periodicals**
5. Enter a **Sub Group** for example **No of Loans per Issue**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details:** For this sample Report we will leave as the Defaults
   - **None**: To display all the details
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **tick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
12. **Private.** For our sample leave this **unticked**.
13. **Show header on first page.** For our sample leave this **ticked**
14. **Show header on next pages**. For our sample leave this **unticked**

Display Fields



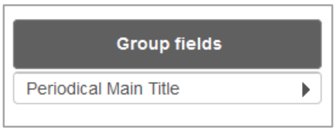
6. Highlight the **Periodicals** Entity from the **Entities / Data Fields**

7. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have Periodical Copy Barcode, **StockHistoryType**
8. As we wish to **COUNT** the No of Issues:
    - Select **StockHistory** Type
    - Ensure that the Function is set to **COUNT**
    - It is a good idea to alter the alignment to **right** so that the Number of the Count line up correctly
    - Change the **Header** if required – for example No of Issues
    - We also altered the **width** to 3 cms

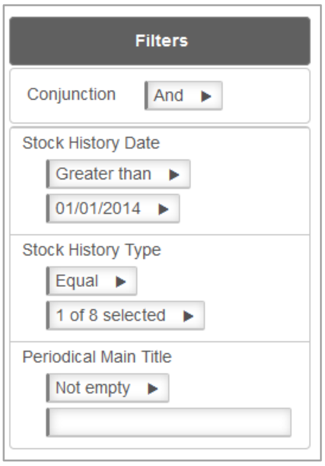


Group

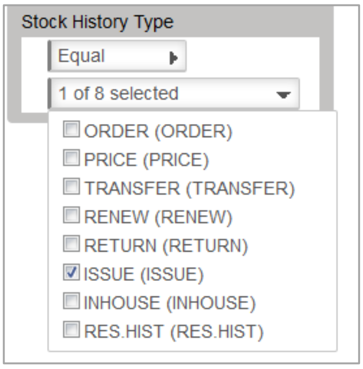
Drag and drop **Periodical Main Title** to the **Group fields** column



Filter



11. Select the **Stock History** Entity
12. Drag and drop **Stock History Date** to the Filter
13. Select **Greater than or Equal** from the Drop-down Options
14. Select the required **Date** from the **Calendar.** It is also possible to add a Less than or equal to date to make it a range of dates
15. Select **Stock History Type** and Drag and drop to the **Filter**
16. Ensure **ISSUE (or RETURN)** is selected



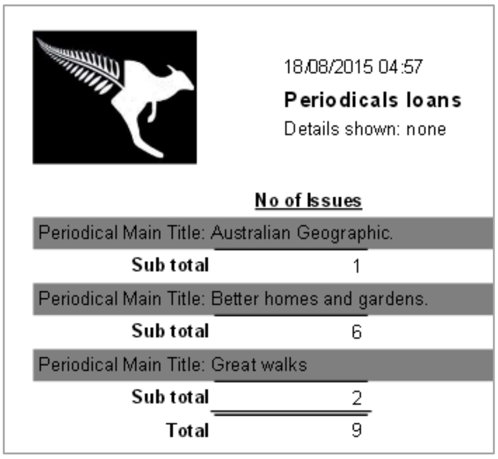
17. Select **Periodical Main Title** and make it **Not Empty** to ensure that you report on just those records

Order by

There can be an order if required.

Preview

Select **Preview** to view the Report


18/08/2015 04:57
Periodicals loans
Details shown: none

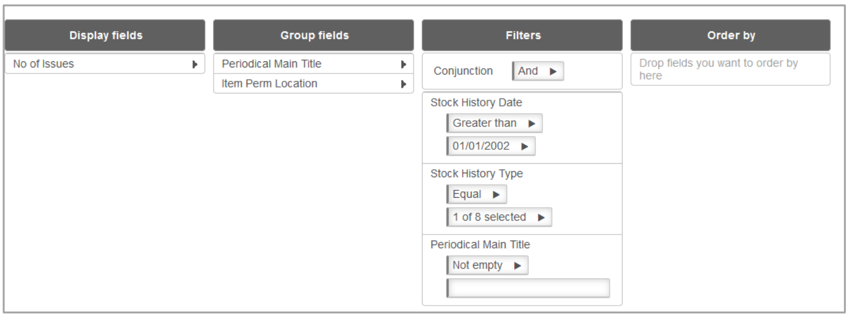
	No of Issues
Periodical Main Title: Australian Geographic.	
Sub total	1
Periodical Main Title: Better homes and gardens.	
Sub total	6
Periodical Main Title: Great walks	
Sub total	2
Total	9

Save

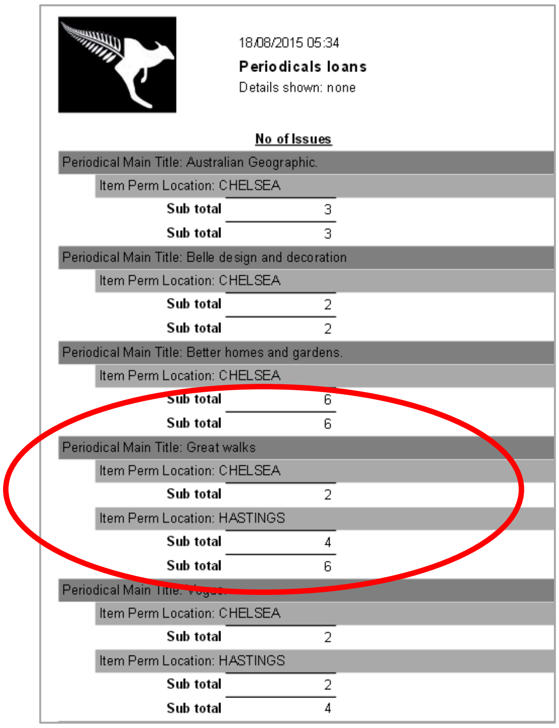
Once the Report is successful, save so it can be used again in the Viewer or Designer

Filter on Location

It is possible to also Filter on Location (Note: It is better to use Item Perm Location as Subscription Location is no longer relevant – Subscriptions are based on Library Groups)



Resulting in the following report:



Select the required **Date** from the **Calendar.** It is also possible to add a Less than or equal to date to make it a range of dates

Order by

There can be an order if required.

For the Sample, Periodical Main Title (Ascending) and Periodical Date Recd (Descending) so the copies most current show first

Preview

Select **Preview** to view the Report

Note: The Headings can be made wider so that they look better

Periodical Copy Title	Periodical Copy Barcode	Periodical Date Recd	Periodical Subs Cost Per Issue
Periodical Main Title: Better homes and gardens.			
June 2015	STOCK00484164B	04/05/2015	$ 6.00
May 2015	STOCK00484172B	04/05/2015	$ 6.00
Periodical Main Title: Gardening Australia magazine			
Sep 2015	STOCK00491217B	05/10/2015	$ 4.00
Aug 2015	STOCK00491209B	05/10/2015	$ 4.00
Jul 2015	STOCK00491195B	05/10/2015	$ 4.00
Periodical Main Title: Great walks			
Vol. 15 No. 5, Sep-Oct 2015	STOCK00490822B	26/08/2015	$ 12.50
Vol. 15 No. 4, Jul-Aug 2015	STOCK00490814B	24/08/2015	$ 12.50
Vol. 15 No. 3, May-Jun 2015	STOCK00490806B	24/08/2015	$ 12.50
Vol. 15 No. 2, Mar-Apr 2015	STOCK00490792B	24/08/2015	$ 12.50
Vol. 15 No. 1, Jan-Feb 2015	STOCK00490784B	24/08/2015	$ 12.50

Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

RESERVATION ENTITY – RESERVATIONS READY

1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

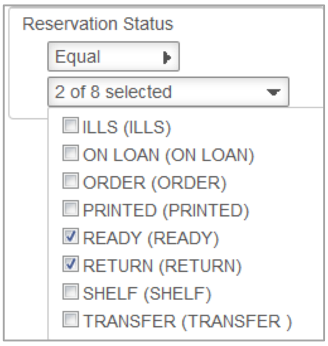
3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of "**Reservations ready**"
4. Enter a **Group** if the Reports for example **Reservations**
5. Enter a **Sub Group** for example **Ready for collection**
6. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
   - **Landscape** (select for the sample)
8. Leave **Show sql**
9. **Show details:** For this sample Report we will leave as the Defaults
   - **All**: To display all the details
10. **Show Sub totals if** a calculation based on Groups is required (Default is unticked). For the sample **untick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **untick** this
12. **Private.** For our sample leave this **unticked**.
13. **Show header on first page.** For our sample leave this **ticked**
14. **Show header on next pages.** For our sample leave this **unticked**

Display Fields

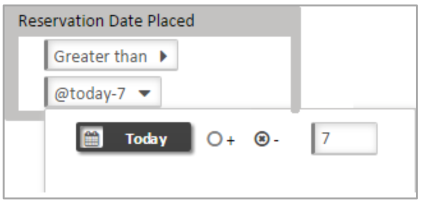
1. Highlight the **Reservations** Entity from the **Entities / Data Fields**
2. Drag and drop **the required Data Fields** into the Display Field Column. In this sample we have Borrower Full Name – Surname, Given, Reservation Item Title, Reservation Date Placed, Reservation Collection Location

Filter

1. Select the **Reservations** Entity
2. Drag and drop **Reservation Status** to the Filter
3. Select **Equal** from the Drop-down Options
4. Select the required **Statuses** from the **Options.** In this sample we have included **Ready** and **Return**



5. It is also useful to choose a **Date range** – for example **Greater and Equal to Today – xx** days or select a specific date from the **Calendar**



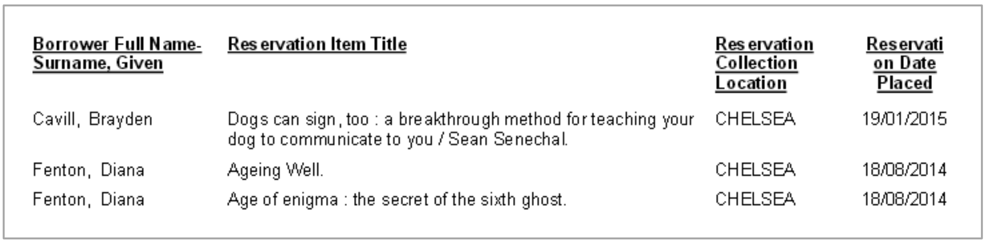
Order by

There can be an order if required.

Preview

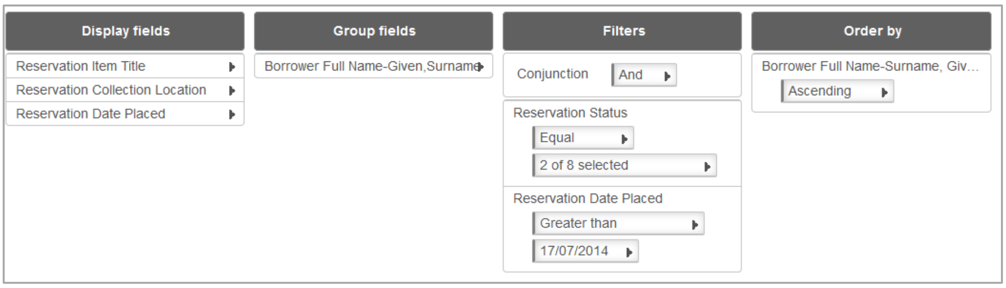
Select **Preview** to view the Report

Note: The Headings can be changed to make them neater!



Borrower Full Name-Surname, Given	Reservation Item Title	Reservation Collection Location	Reservation Date Placed
Cavill, Brayden	Dogs can sign, too : a breakthrough method for teaching your dog to communicate to you / Sean Senechal.	CHELSEA	19/01/2015
Fenton, Diana	Ageing Well.	CHELSEA	18/08/2014
Fenton, Diana	Age of enigma : the secret of the sixth ghost.	CHELSEA	18/08/2014

Or include a Group of Borrower Full name – Given, Surname… so that the name does not repeat!



17/07/2015 05:23

Reservations are ready

Details shown: all

Reservation Item Title	Reservation Collection Location	Reservation Date Placed
Borrower Full Name-Surname, Given: Cavill, Brayden		
Dogs can sign, too : a breakthrough method for teaching your dog to communicate to you / Sean Senechal.	CHELSEA	19/01/2015
Borrower Full Name-Surname, Given: Fenton, Diana		
Ageing Well.	CHELSEA	18/08/2014
Age of enigma : the secret of the sixth ghost.	CHELSEA	18/08/2014

Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

STATISTICS ENTITY - ISSUES BY LOCATION AND BORROWER TYPE WITH GRAPH

Skills outlined in this Sample – Test using Table and then display a Graph using an x and y axis, using Statistics Count from the database, setting Financial Year from the Calendar,

When choosing Statistics Reports:

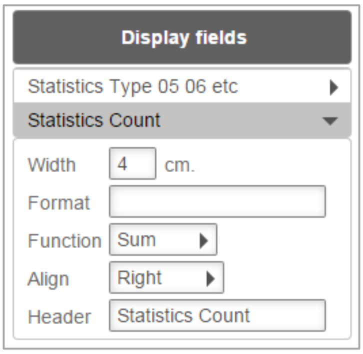
2. It is best to take away the **Show details** option so that just the relevant Counts show
3. It is also possible to select one Location to pinpoint statistics at each Location
4. Group the report in a logical fashion
5. Order the report in a logical fashion
6. Use the special Statistics Count to count the figures based on the Filters used
7. Graphs can be used effectively within the Statistics area
8. The Statistics Type is an important element of the Report as it will determine which Statistics to report on. The listing of Statistics Type can be found in Amlib under Supervisor/Stats Params

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section.. For the sample for example "**Issues by Location and Borrower Type**".
5. Enter a **Group** since we want to find it later easily – for example **Statistics**
6. Enter a **Sub Group** – for example **Issues by Borrower Type**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample) We will test it as a Table and then change it to graph when we are happy with the results
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details:** For this sample Report we will set to None because we only want the figures
    - **None**: We want only the raw figures which we will later plot on a graph
11. **Show Sub totals:** Tick to get **Subtotals**.
12. **Show total: Tick to get Totals.**
13. **Private**. Leave this **unticked**.
14. **Show header on first page**: This is your choice. But for now leave this **unticked**
15. **Show header on next pages:** This is your choice. But for now leave this **unticked**

Display Fields

1. Select the Statistics **Entity**
2. Drag and drop **Statistics Count i**nto the Display Fields Table. This is a special count from the Statistics Database. Ensure the Format shows **Sum**



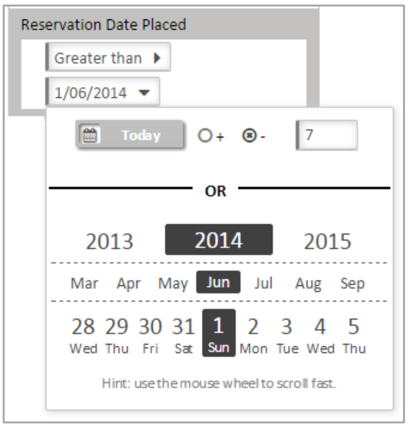
Group Fields

1. *Drag and drop* the **Statistics Borrower Type** to the **Group Fields** table

Filter

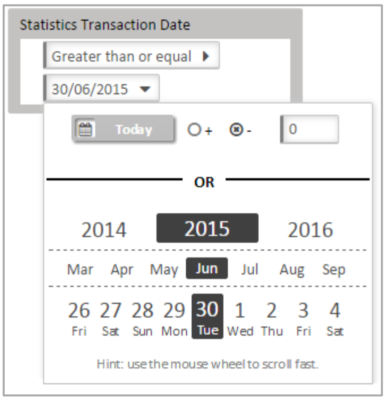
The Filter can be selected to target exactly the data required. For example: Filter the Statistics by Financial Year

1. Drag and drop **Statistics Transaction Date** to the **Filter** column
2. *Select* Greater than or equal
3. *Select* the beginning of the Financial Year using the **Calendar**
    - Highlight the correct **Year –** for example **2014.** Select the dates by using the wheel on the mouse – scroll down to select Months in the past, and scroll up to get dates in the future
    - Highlight the correct **Month** for example June.
    - Highlight the correct **Day** for example 1. Select the dates by using the wheel on the mouse – scroll down to select Months in the past, and scroll up to get dates in the future

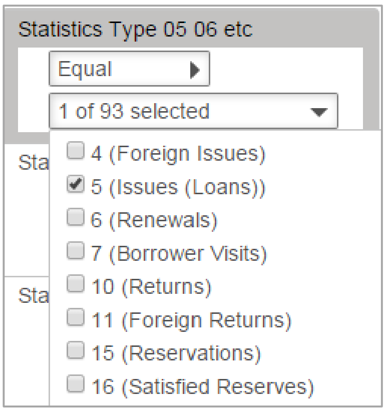


4. Drag and drop **Statistics Transaction Date** once again to the Filter column
5. Select Less than

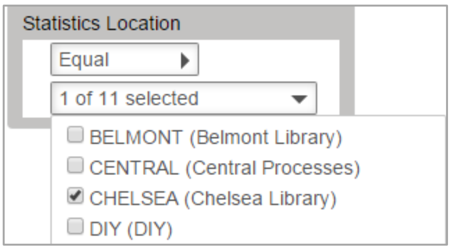
6. Select the end of the Financial Year using the Calendar
    a. Highlight the correct Year 2015
    b. Highlight the correct month **June**
    c. Highlight the correct day **30**



    d. Select out of the Calendar and the correct date will be set in the Field
7. Drag and drop **Statistics Transaction Type** to the **Filter** column
8. Select the required Statistics Type codes – for example, **Issues**



9. Drag and drop **Statistic Location** to the **Filter** column
10. Select **Equal**
11. Select the required **Location** – for example Chelsea



Preview

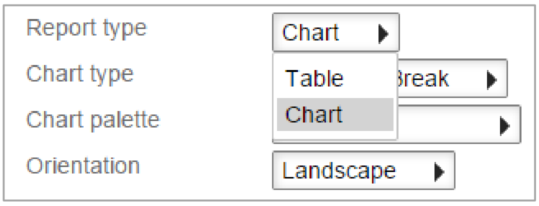
Select **Preview** to view the Report

Statistics Type 05 06 etc	Statistics Count
Statistics Borrower Type: A	
Sub total	18
Statistics Borrower Type: J	
Sub total	4
Statistics Borrower Type: M	
Sub total	11
Statistics Borrower Type: S	
Sub total	2
Statistics Borrower Type: T	
Sub total	6
Statistics Borrower Type: Y07	
Sub total	10
Statistics Borrower Type: Y11	
Sub total	19
Total	70

12. If the Table report is fine, it is possible to change the **Report Type** from the Drop-down options to Chart

Chart

1. Select the **Report Type** of **Chart**

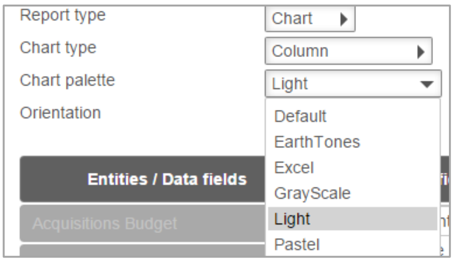


2. Select the **Chart Type**

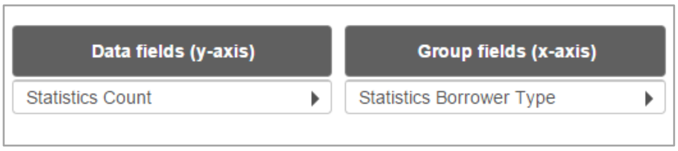
For example **Column**

3. Select the **Chart Palette**

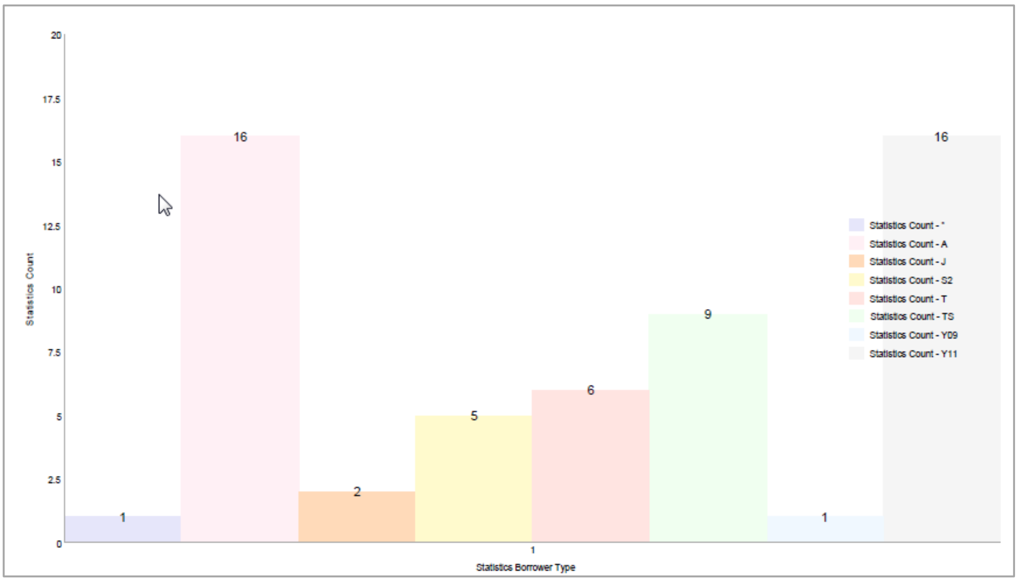
For example **Light**



4. Select the **Orientation –** for example **Landscape**
5. Once **Chart** is selected the *Data Fields* become the **y-axis** and the *Group* becomes the **x-axis**



6. **Preview** the Report



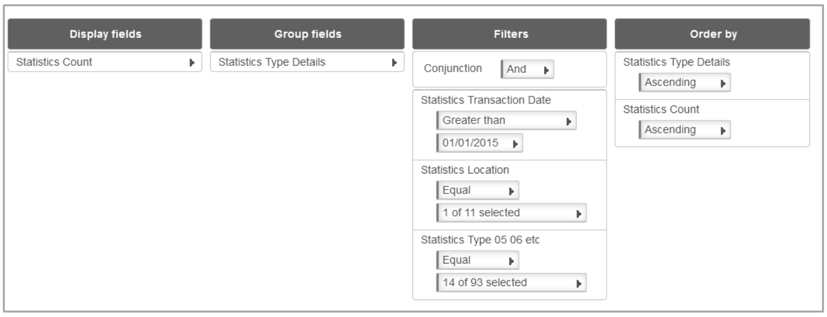
Save

Once the Report is successful, select **Save** to be available in the Report Viewer as a graph

STATISTICS ENTITY - SUMMARY OF ACTIVITY 2015

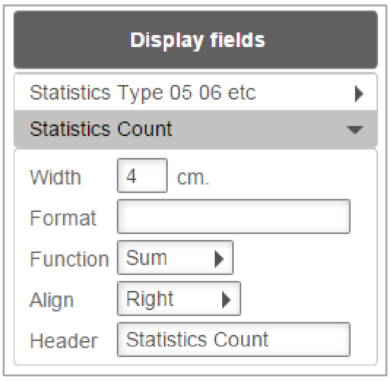
1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section.. For the sample for example **Summary of Statistics 2015**
5. Enter a **Group** since we want to find it later easily – for example **Statistics**
6. Enter a **Sub Group** – for example **Summary**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample) We will test it as a Table and then change it to graph when we are happy with the results
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details**: For this sample Report we will set to None because we only want the figures
    - **None**: We want only the raw figures to give us a summary
11. **Show Sub totals**: could be **ticked**.
12. **Show total:** could be **ticked**.
13. **Private:** leave this **unticked**.
14. **Show header on first page:** This is your choice. But for now leave this **unticked**
15. **Show header on next pages**: This is your choice. But for now leave this **unticked**



Display Fields

1. Select the Statistics **Entity**
   1. Drag and drop **Statistics Count** into the Display Fields Table. This is a special count from the Statistics Database. Ensure the Format shows **Sum**



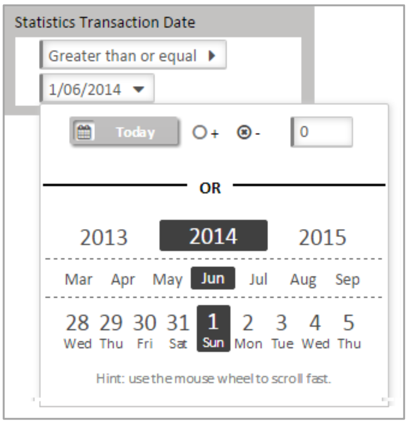
Group Fields

Drag and drop the **Statistics Type Details** to the **Group Fields** table

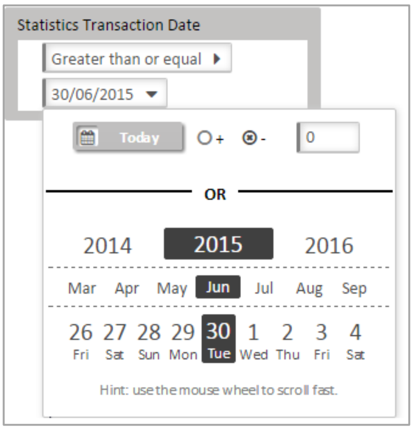
Filter

The Filter can be selected to target exactly the data required. For example: Filter the Statistics by Financial Year

1. Drag and drop **Statistics Transaction Date** to the **Filter** column
2. Select **Greater than or equal**
3. Select the beginning of the Financial Year using the **Calendar**
    a. Highlight the correct **Year –** for example **2014.** Select the dates by using the wheel on the mouse – scroll down to select Months in the past, and scroll up to get dates in the future
    b. Highlight the correct **Month** for example June.
    c. Highlight the correct **Day** for example 1. Select the dates by using the wheel on the mouse – scroll down to select Months in the past, and scroll up to get dates in the future

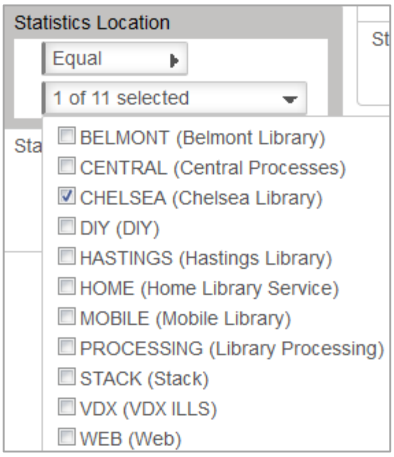


4. Drag and drop **Statistics Transaction Date** once again to the **Filter** column
5. Select **Less than**
6. Select the end of the Financial Year using the Calendar
    a. Highlight the correct Year 2015
    b. Highlight the correct month **June**
    c. Highlight the correct day **30**

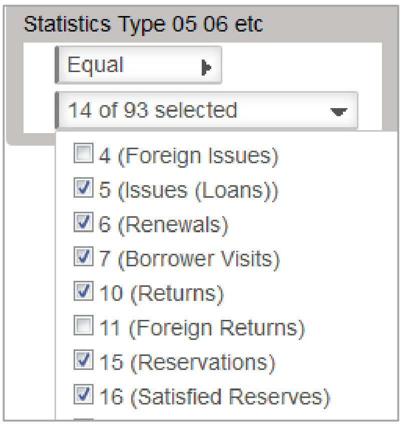


d. Select out of the Calendar and the correct date will be set in the Field

7. Drag and drop **Statistics Location** to the **Filter** column
8. Select the required Statistics Location code/s. For example, Chelsea Library only

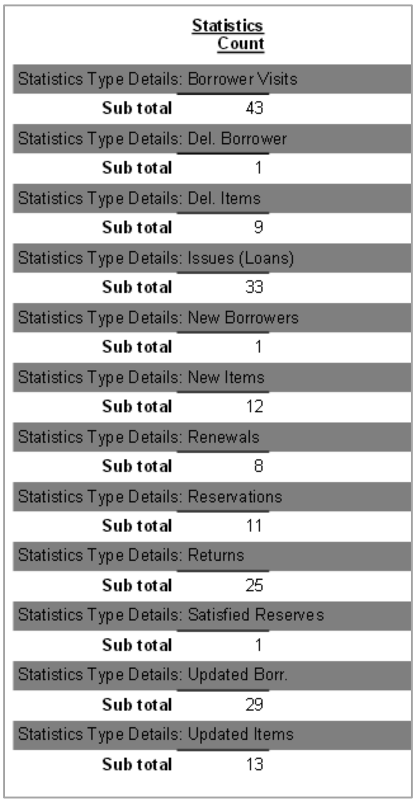


9. Drag and drop **Statistics Transaction Type** to the **Filter** column
10. Select the required Statistics Type codes – for example, **05 Issues, 06 Returns, 07 Borrower Visits, 10 Returns, 16 Satisfied Reserves, 80 New Borrowers, 90 New Items,** etc.



Preview

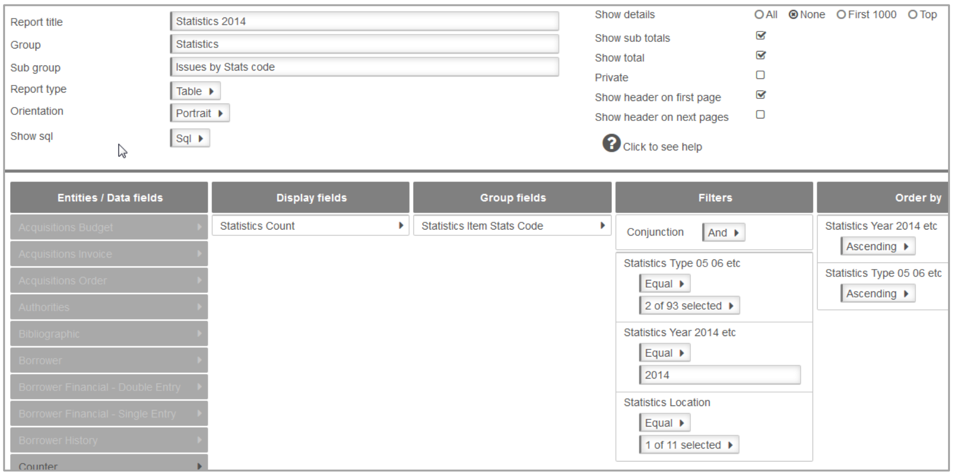
Select **Preview** to view the Report



	Statistics Count
Statistics Type Details: Borrower Visits	
Sub total	43
Statistics Type Details: Del. Borrower	
Sub total	1
Statistics Type Details: Del. Items	
Sub total	9
Statistics Type Details: Issues (Loans)	
Sub total	33
Statistics Type Details: New Borrowers	
Sub total	1
Statistics Type Details: New Items	
Sub total	12
Statistics Type Details: Renewals	
Sub total	8
Statistics Type Details: Reservations	
Sub total	11
Statistics Type Details: Returns	
Sub total	25
Statistics Type Details: Satisfied Reserves	
Sub total	1
Statistics Type Details: Updated Borr.	
Sub total	29
Statistics Type Details: Updated Items	
Sub total	13

Another Example

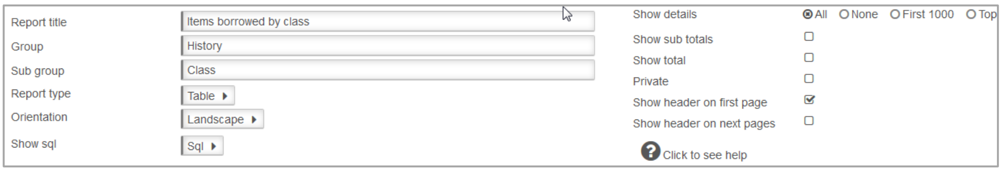
Issues for 2014 grouped by Stats codes



STOCK HISTORY ENTITY - CLASS HISTORY OF ITEMS READ

The Borrower History within the Borrower Details window usually shows a combination of the Borrower History (Has Read) if kept and the Item History (Returned) details so that if the Borrower History does not give the information required, then the Stock History may be better for this purpose

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display



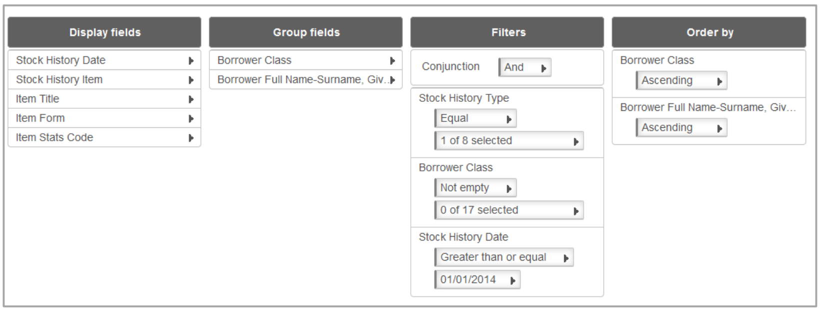
4. Enter a **Report Title** in the Report Title section. For the sample we can give a Title of **Items borrowed by Class**
5. Enter a **Group** since we want to find it later easily – for example **History**
6. Enter a **Sub Group** – for example **Class**
7. Choose **Report Type** from the Drop-down options (Table is default):
    - **Table** – set out in rows and columns (select for the sample)
8. Select Orientation
    - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details**: For this sample Report we will leave as the Defaults
    - **All**: Shows the break-down of details within the Fields (Default)
11. **Show Sub totals:** leave this **unticked**
12. **Show total:** leave this **unticked**
13. **Private**: leave this **unticked**
14. **Show header on first page:** For our sample **tick** this one
15. **Show header on next pages:** This is your choice. But for now leave this **unticked**

Display Fields

1. Highlight the required **Entity** from the **Entities / Data Fields**
2. For our sample, select the Entity of **Stock History**
3. Highlight the first Field for the History. This could be **Stock History Date**
4. Drag and drop into the Display Field Table. Continue to drag other **Data Fields** as required

For the Sample we would like to see the **Stock History Date, Stock History Item (Barcode)**

5. Select the **Entity** of **Stockitem**
6. Drag and drop **Item Title, Item Form and Item Stats Code** into the **Display Field** Column

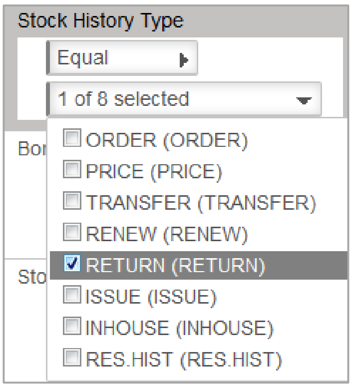


Group

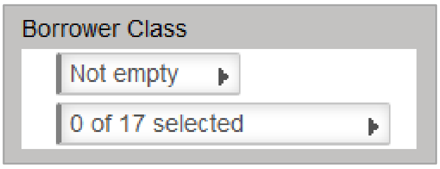
1. *Select* the <u>Entity</u> of **Borrower**
2. *Drag and drop* **Borrower Class.** We also added a **Borrower Full Name – Surname, Given** as a Group

Filter

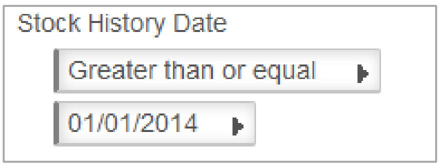
1. The **Filter** was **Stock History Type** of Return



2. It is possible to choose one or several classes. To get all the Classes, it is possible to choose Not Empty



3. We also included a **Date range** for the History. Modify as required



4. For the **Order** by we included **Stock History Item** (Ascending) and **Stock History Date** (Descending)

5. **Preview** the report. The Report is grouped by each Stock History Item

Stock History Date	Stock History Item	Item Title	Item Form	Item Stats Code
Borrower Class: 1B				
Borrower Full Name-Surname, Given: Atkinson, Andrew				
12/02/2015	980484710	The Fifth Horseman / Nathan M. Adams	BK	AF
Borrower Class: 2A				
Borrower Full Name-Surname, Given: Bosak, Jackson				
18/06/2015	STOCK00 485438B	The kite and Caitlin / Roger McGough	BK	ANF
Borrower Full Name-Surname, Given: Cameron, Katrina				
08/07/2015	STOCK00 381101B	The accidental billionaires [electronic resource] / Ben Mezrich ; read by Mike Chamberlain.	DVD	CI
20/08/2014	STOCK00 446661B	Better homes and gardens : December 2012.	PE	PER
21/07/2014	I876	The little coffee shop of Kabul / Deborah Rodriguez.	BK	ANF
Borrower Full Name-Surname, Given: Fenton, Diana				
21/07/2014	16906	Harry Potter and the chamber of secrets / J.K. Rowling.	BK	ANF
Borrower Full Name-Surname, Given: Frost, Taylor				
15/06/2015	58766	Reading Box Music	BK	ANF
10/01/2014	980473528	Dark moon / David Gemmell	BK	AF
15/06/2015	58766	Reading Box Music	BK	ANF
15/06/2015	58766	Reading Box Music	BK	ANF

Save

Once the Report is successful it is useful to **Save** it to be available in the Report Viewer

STOCK HISTORY - TOP 10 ITEMS BORROWED BY BORROWER TYPE

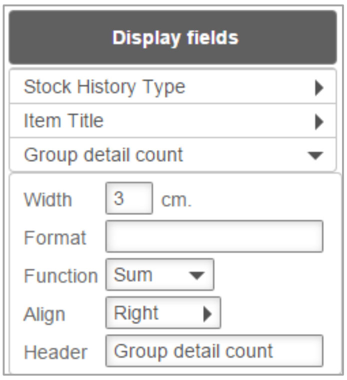
Skills outlined in this Sample include– *Use of the Top 10, Order by Descending, Using the Catalogue Reference to "combine items", use of the Count Data Field from the Counter Entity, selecting dates from the calendar*

1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

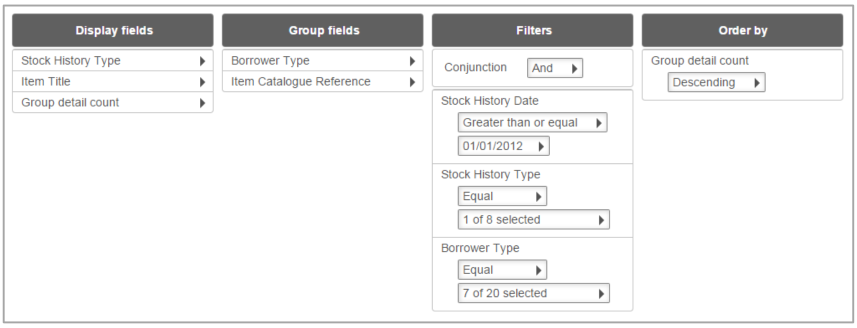
4. Enter a **Report Title** in the Report Title section. For the sample **Most Popular items by Borrower Type**
5. Enter a **Group** since we want to find it later easily – for example **Stockitem**
6. Enter a **Sub Group** – for example **Loans by History – top 10**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Portrait** (select for the sample)
9. Leave **Show sql**
10. **Show details:** For this sample Report enter
    - **Top**: Enter the Top value required – for example 10
11. **Show Sub totals:** leave this **unticked**.
12. **Show total:** leave this **unticked**.
13. **Private**. Leave this **unticked**.
14. **Show header on first page**: For our sample **tick** this one if required
15. **Show header on next pages**: This is your choice. But for now leave this **unticked**

Display Fields

1. Select the **Stock History** Entity
2. Select **any** Data Field from the Entity and drag and drop to Display – this will set the Counter correctly so it knows to count from the History Table. For our sample we chose Stock History Type
3. Select the Stockitem **Entity**
4. Drag and drop **Item Title** to Display Fields
5. Select the Entity of **Counter**
6. Drag and drop **Group detail count** to the Display Fields
7. Select **Group detail count** to Format



8. Make the **Function Sum** so it adds the counts together
9. Change the **Header** if required



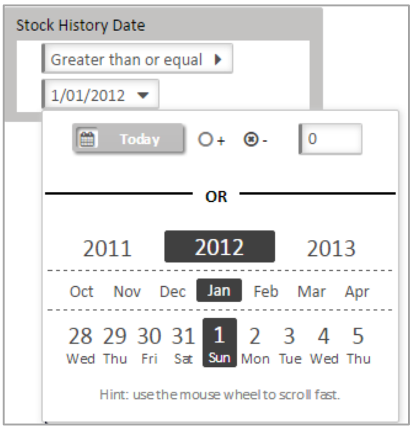
Group Fields

1. Decide how do you want the popular items displayed? We have had many requests to categorise the groupings by Borrower Type – for instance "What are the popular books of Year 11 and 12? What are the popular Titles by the Junior Readers etc.
2. Drag and drop **Borrower Type** to the Group fields
3. It is also wise to group the Items by **Catalogue Reference number** so that you get the multiple copies of a popular item combined as a Count. So to do this, drag and drop Item Catalogue Reference to the Group fields as well

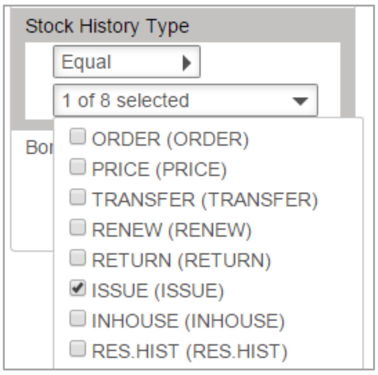
Filter

The Filter can be selected to target exactly the data required. For example: filter the results to get ALL current Loans

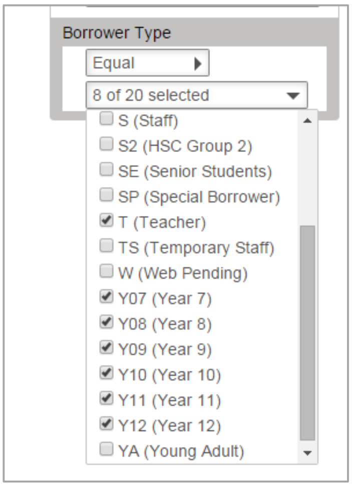
1. Select the **Stock History** Entity
2. Drag and drop **Stock History Date** over to the **Filter By** Section
3. Select **Greater than** from the Drop-down Options
4. Enter a **Date** as appropriate using the **Calendar**. **Note**: A Date range could be set if required



5. Drag and drop **Stock History Type** over to the **Filter By** Section
6. *Select* the History Type to report on (likely to be **ISSUE** or RETURN)



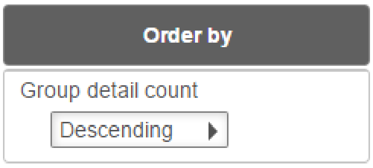
7. *Drag and drop* **Borrower Type** over to the <u>Filter By</u> Section
8. *Select* the Borrower Type/s to report on , from to the drop-down options



Order by

It is useful to have an Order sequence of Group detail count to be Descending so it shows from the **most read**

1. Select **Group detail count** from the Counter Entity and drag and drop to the **Order by** section
2. Select **Descending** from the drop-down box



Preview

Select **Preview** to view the Report

Item Title	Stock History Type	Group detail count
Borrower Type: A		
Item Catalogue Reference:		
World Stean Locomotives	ISSUE	21
Item Catalogue Reference: 35065		
Chemistry one : materials, chemistry in everyday life.	ISSUE	8
Item Catalogue Reference: 25634		
Belle Sep 1997	ISSUE	5
Item Catalogue Reference: 25055		
The Druid of Shannara / Terry Brooks	ISSUE	4

Save

Once the Report is successful, select **Save** to be available in the Report Viewer

Note: Try adapting this Report but use Stats code or Form Code instead of Borrower Type

STOCK HISTORY ENTITY - ITEM HISTORY BY DATE RANGE

Skills outlined in this Sample – *Using Stockitem History Fields, setting Time in the Date format*

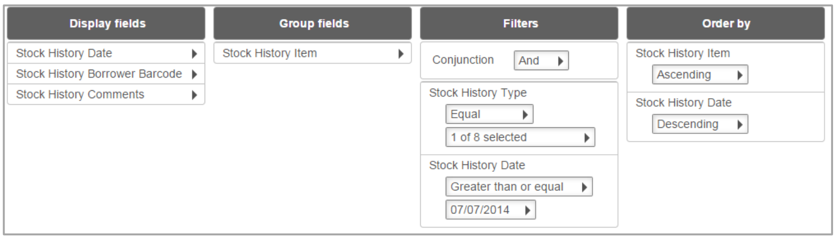
1. Access the **Report Designer** TAB
2. Select **New** from the buttons
3. The **Edit Report** Window will display

4. Enter a **Report Title** in the Report Title section.. For the sample we can give a Title of "**Item History report**"
5. Enter a **Group** since we want to find it later easily – for example **Stockitem**
6. Enter a **Sub Group** – for example **History**
7. Choose **Report Type** from the Drop-down options (Table is default):
   - **Table** – set out in rows and columns (select for the sample)
8. Select **Orientation**
   - **Landscape** (select for the sample)
9. Leave **Show sql**
10. **Show details**: For this sample Report we will leave as the Defaults
    - **All**: Shows the break-down of details within the Fields (Default)
11. **Show Sub totals:** leave this **unticked**.
12. **Show total**: leave this **unticked**.
13. **Private:** leave this **unticked.**
14. **Show header on first page**: For our sample **tick** this one
15. **Show header on next pages**: This is your choice. But for now leave this **unticked**

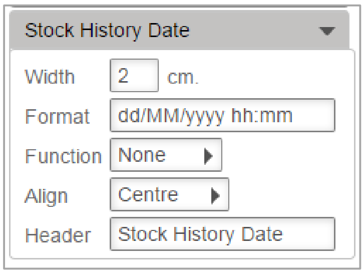
Display Fields

1. Highlight the required **Entity** from the Entities / Data Fields
2. For our sample, select the Entity of **Stockitem History**
3. Highlight the first Field for the History. This could be **Stock History Date**
4. ***Drag and drop*** into the Display Field Table. Continue to *drag* other Data Fields as required

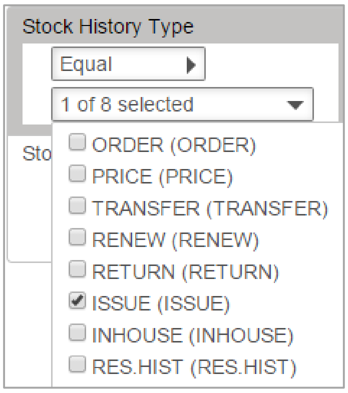
For the Sample we would like to see the **Stock History Date, Stock History Borrower Barcode, Stock History Comments**



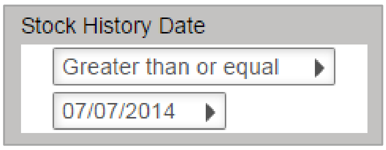
5. For the Date field we can add the time element to it as well – for example Hour and Minutes



6. We added a **Group** field of Stock History Item. You could also add
7. The **Filter** was **Stock History Type** of Issue but can be modified if required

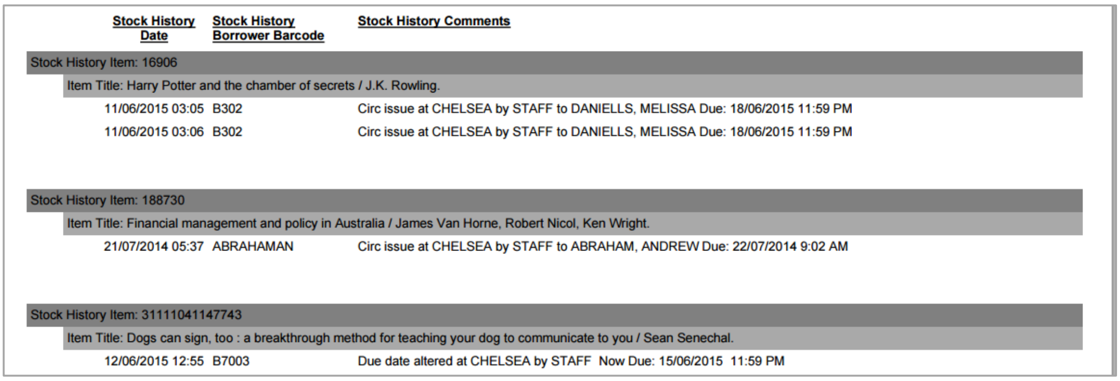


8. We also included a **Date range** for the History. Modify as required



9. For the **Order** by we included **Stock History Item** (Ascending) and **Stock History Date** (Descending)

10. **Preview** the report. The Report is grouped by each Stock History Item



Stock History Date	Stock History Borrower Barcode	Stock History Comments
Stock History Item: 16906		
Item Title: Harry Potter and the chamber of secrets / J.K. Rowling.		
11/06/2015 03:05	B302	Circ issue at CHELSEA by STAFF to DANIELLS, MELISSA Due: 18/06/2015 11:59 PM
11/06/2015 03:06	B302	Circ issue at CHELSEA by STAFF to DANIELLS, MELISSA Due: 18/06/2015 11:59 PM
Stock History Item: 188730		
Item Title: Financial management and policy in Australia / James Van Horne, Robert Nicol, Ken Wright.		
21/07/2014 05:37	ABRAHAMAN	Circ issue at CHELSEA by STAFF to ABRAHAM, ANDREW Due: 22/07/2014 9:02 AM
Stock History Item: 31111041147743		
Item Title: Dogs can sign, too : a breakthrough method for teaching your dog to communicate to you / Sean Senechal.		
12/06/2015 12:55	B7003	Due date altered at CHELSEA by STAFF Now Due: 15/06/2015 11:59 PM

Save

Once the Report is successful it is useful to **Save** it to be available in the Report Viewer

STOCKITEM ENTITY - AVERAGE COST OF ITEM BY STATS CODE

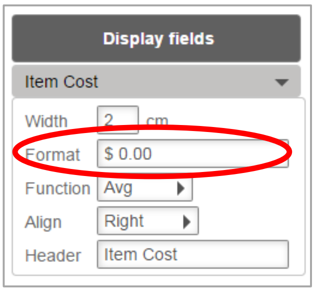
Skills outlined in this Sample – *Getting Averages, Setting format to $ 0.00*

1. Select **New** from the buttons of the *Report Designer*
2. The **Edit Report** Window will display

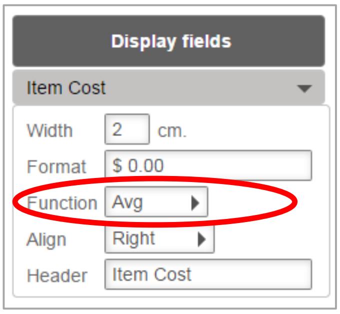
3. Enter a **Report Title** in the Report Title section. This can display at the top of the report. For the sample we can give a Title of **Average cost of item by Stats Code**
4. Enter a **Group** if the Reports for example **Stockitem**
5. Enter a **Sub Group** for example **Average Cost for items**
6. Choose Report Type from the Drop-down options (Table is default):
    - **Table** – set out in rows and columns (select for the sample)
7. Select **Orientation**
    - **Landscape** (select for the sample)
8. Leave **Show Sql**
9. **Show details**: For this sample Report we will leave as the Defaults
    - **None**: Shows the numbers for the results but not the details within the Report. Fields will be hidden
10. **Show Sub totals** if a calculation based on Groups is required (Default is unticked). For the sample **tick** this
11. **Show total** if a Total calculation of the Sub totals is required (Default is unticked). For the sample **tick** this
12. **Private** For our sample leave this **unticked**.
13. **Show header on first page.** For our sample leave this **ticked**
14. **Show header on next pages**. For our sample leave this **unticked**

Display Fields

1. Highlight the **Entity** from the **Entities / Data Fields** Column
2. For this sample, select the entity of **Stockitem**
3. Drag and drop **Item Cost** into the Display Field Table
4. Click on the Item Cost to set the Format to $ 0.00 (ensure a space is inserted after the $ symbol)



5. Change the Function to Avg.



6. Check that the **Align** is Right. Alter the Heading to Average Cost per Item to make more sense of the report and change the Width to cater for the longer Heading

Group

1. Highlight the **Stockitem Entity** from the **Entities/Data fields** column
2. Drag and drop **Item Stats Code** to the **Group fields** column which will base the Average on Item Stats Code

Filter

It is not necessary to select a **Filter** at all if you want to display the **average of All Stats codes** returned as a result

NOTE: A Filter can be defined if only certain Stats codes are required or an extra element is to be included – for example, only certain Locations, certain Form Codes, set a Date Received to get an Average of new resources, those that have a certain Process code like Missing in Stocktake etc.

Order by

It is not necessary to display an Order unless a specific Order is required

Preview

Select **Preview** to view the Report

Average Cost per item

Item Stats Code: AF	
	7.33
Item Stats Code: ANF	
	9.12
Item Stats Code: J	
	6.49
Item Stats Code: JK	
	8.31
Item Stats Code: LP	
	5.04
Item Stats Code: YA	
	6.17

Save

Once the Report is successful, save so it can be used again in the Viewer or Designer

APPENDIX 1: DATA FIELDS FROM MAIN ENTITIES EXPLAINED

ACQUISITIONS – BUDGET

Examples include:

- Budget Commitments for this Year
- Actual Expenditure for this Year
- Different Group Levels used for the current Year
- Budget Total Amount for the last 5 years

Data Element	**Description**	**Example**	**Database Name** ACCOUNT_HDR unless specified
Budget Account	Account code which is used for the expenditure within a budget	AF	ACH_ACCOUNT
Budget Account Details	Account description rather than the code	Adult Fiction	ACH_DESC
Budget Actual Amount	Actual Amount Spent within the Budget and on longer committed	2000.00	ACH_ACTUAL
Budget Commit Amount	Actual Amount Ordered and Committed within the Budget	1000.00	ACH_COMMIT
Budget Financial Year	Current Financial Year – generally the one to use as is available as a Drop-down and references the Financial Years in use	2014	ACH_YEAR
Budget Group Level 1	GL Code 1 from the Budget hierarchy	LIB	ACH_GROUP1
Budget Group Level 1 Details	GL Code 1 Description from the Budget hierarchy	Library	ACCNO_GROUP.ACCNO_CODE_DESC
Budget Group Level 2	GL Code 2 from the Budget hierarchy	BK	ACH_GROUP2
Budget Group Level 2 Details	GL Code 2 Description from the Budget hierarchy	Books	ACCNO_GROUP.ACCNO_CODE_DESC
Budget Group Level 3	GL Code 3from the Budget hierarchy	AF	ACH_GROUP3
Budget Group Level 3 Details	GL Code 3 Description from the Budget hierarchy	Adult Fiction	ACCNO_GROUP.ACCNO_CODE_DESC
Budget Group Level 4	GL Code 4 from the Budget hierarchy	NOV	ACH_GROUP4

Budget Group Level 4 Details	GL Code 4 Description from the Budget hierarchy	Novels	ACCNO_GROUP.ACCNO_CODE_DESC
Budget Library Group	Library Group for current Budget	PRIM	ACH.LIB.GROUP
Budget Total Amount	Budgeted Amount allowed to spend within the Budget	5000.00	ACH.BUDGET

ACQUISITIONS – INVOICES

This Report enables reports for the Order Invoices within the system. Ideas for reports could be:

- Recent Invoices within a Date range
- Invoice lines for a particular Invoice No
- Invoices from Supplier/s
- Total Costs of invoices created since the beginning of the month
- Pending invoices

Data Element	Description	Example	Database Name – ACCOUNT_HEADER unless shown
Invoice Account	Account Code applied to the Invoice	ANF	ACCOUNT_COMPONENT.AC_ACCNO
Invoice Account Details	Description of the Account Code, applied to the Invoice	Adult Non Fiction	ACCOUNT.ACCNO_DESC
Invoice Allocation	Allocation Code set for the Order being invoiced	PK	ACCOUNT_COMPONENT.AC_ALLOCATE
Invoice Allocation Details	Description of the Allocation Code set for the Order being Invoiced	Paul Kosch	FIN_ALLOC.FA_DESC
Invoice Author	Invoice Line 2	Winton, Tim	ACCOUNT_COMPONENT.AC_LINE2
Invoice Date	Date Invoice was created	19/08/2015	AH_INVOICE_DATE
Invoice Discount	Discount as applied to the Invoice line	10%	ACCOUNT_COMPONENT.AC_DISCOUNT
Invoice Discount Indicator % or $	Indicates whether the Discount applied to Invoice costs is shown as a percentage, or money amount	%	ACCOUNT_COMPONENT.AC_DISCOUNT_ind
Invoice Forex Code	Foreign Exchange code as applied to the Invoice Header	AUS	AH_FCCODE
Invoice Forex Cost	Cost that applies to the Invoice Header prior to Discounts	30.00	AH_FCVALUE
Invoice Forex Date	Date of the Foreign Exchange code	01/01/1995	AH_FCDATE
Invoice Forex Rate	Rate applied to the Invoice amount for Foreign exchange	1.0000	AH_FCRATE
Invoice Lib Group	Library Group owning the Invoice Header	LIBRARY	AH_LIB_GROUP
Invoice Line includes Stockitem	The invoice line reference a Stockitem. Y/N	Y	AC_COMPONENT.AC_STOCKITEMYN
Invoice Line Notes	Notes associated with the Invoice Lines	Price changed on Invoice – discounted	AC_COMPONENT.AC_NOTES
Invoice Line Tax Account	Tax Account allocated on Invoice line	TAX	AC_COMPONENT.AC_TAX_ACCNO
Invoice Line Tax Code	Tax Code allocated on the Invoice line	GST	AC_COMPONENT.AC_TAX_CODE

Invoice Line Tax Rate	Rate calculated for the Tax code chosen	1.1%	AC_COMPONENT.AC_TAX_RATE
Invoice Local Cost	Invoice Total before Tax – Forex amount minus the tax component	60.00	AH_TOTAL
Invoice No	Invoice Number allocated to the Invoice	008899	AH_INVOICE_NO
Invoice Notes	Invoice Note	Cash purchase at Conference	AH_NOTES
Invoice Order Line No	Order Line No for processing	2	AC_COMPONENT.AC_ORDER_LNO
Invoice Order No	Order No included in the Order Invoice	516	AC_COMPONENT.AC_ORDER_NO
Invoice Report Date	Date of an Invoice report where the Update mode was set to Y	23/04/2015	AH_REPORT_DATE
Invoice Status	Status of the Invoice – either Pending or Invoiced	INVOICED	AH_STATUS
Invoice Supplier	Code of the Supplier for the Invoice	DYM	AH_SUPP_NO
Invoice Supplier Details	Description of the Supplier of the Invoice	Dymocks	PER_SUPPLIER.PS_COMPANY
Invoice Title	Invoice Line 1, usually the Title	Easy Reader Book 2	AC_COMPONENT.AC_LINE1
Invoice Total Tax excl	Invoice Total excluding Tax	66.00	AH_COST
Invoice Unit Cost exc Tax	Cost excluding the Tax component of the Invoice Line	40.00	ACCOUNT_COMPONENT.AC_COST
Invoice Unit Cost inc Tax	Cost including the Tax component of the Invoice Line	44.00	ACCOUNT_COMPONENT.AC_TOTAL
Invoice User Created	User who created the Invoice. Depends on login to the system	STAFF	AH_OPER
Invoiced Qty	No of items within the Invoice Line that have been invoiced	1	ACCOUNT_COMPONENT.AC_QTY_INVOICED

ACQUISITIONS – ORDERS

This Report is a combination of Order Headers and Order Lines

Useful Reports may include:

- Orders placed during a time period
- Orders Invoiced
- Orders Received
- Orders Not Received but placed over a certain date period
- Orders placed by a certain supplier
- Order Lines from a particular Order No

- Orders where the cost of an Order line exceeds $100.00
- Order Header Totals over a certain period

Data Element	Description	Example	Database Name
Order Header Condition	Order Condition of Header	NORM, URGENT	OH_CONDITION
Order Header Date Placed	Date place of the Order	16/09/2015	OH_DATE_PLACED
Order Header Date Printed	Date Order was printed (if in update mode)	16/09/2015	OH_DATE_PRINTED
Order Header Date To Claim	Date specified to claim	16/09/2015	OH_DATE_TO_CLAIM
Order Header Description	Order Header Notes	Delayed with Supplier	OH_DESCRIPTION
Order Header Forex Total	Order Header Total excluding Discounts	$30.00	OH_COST
Order Header Local Cost	Order Header Total Cost including Discounts	$27.00	OH_TOTAL
Order Header Summary	Summary	Bookweek purchases	OH_SUMMARY
Order Header Type	Order Type	NORM	OH_TYPE
Order Line Account	Account code for Order Line	JF	OC_ACCNO
Order Line Account Details	Description for the Account Code shown	Junior Fiction Books	OC_ACCNO_DESC
Order Line Allocation	Allocation code for Order Line	ENG	OC_ALLOC
Order Line Allocation Details	Description for the Allocation Code	English Dept	OC_ALLOC_DESC
Order Line Author	Order Line 2	Winton, Tim	OC_LINE2
Order Line Call No	Order Line 6	F WIN	OC_LINE6
Order Line Catalogue Ref	Order Line Catalogue Reference	103432	OC_CAT_REF
Order Line Discount	Discount allocated to Order Line	10%	OC_DISCOUNT
Order Line Grouping	Order Header Group	37-362392	OC_GROUP-NO
Order Line has Stockitem?	Order line has a Stockitem attached	Y	OC_STOCKITEMYN
Order Line ISBN	ISBN reference	9781863733144	OC_ISBN
Order Line ISSN	ISSN reference	2113-3321	OC_ISSN
Order Line Item	Stockitem Order Barcode	I94323	OC_STOCKITEM
Order Line Form	Form Code of the Order item	DVD	OC_FORM
Order Line Stats Code	Stats Code of the Order item	JF	OC_STATS_CODE
Order Line Lib Group	Library Group for Order Line	LIBRARY	OC_LIB_GROUP
Order Line No	Number of the Order Line	4	OC_ORDER_LNO

Order Line Notes	Notes entered in the Order Line	CIP confirmed	OC_NOTES
Order Line Process	Process associated with the Order Line as set in Defaults	ON ORDER	OC_PROCESS
Order Line Publisher	Order Line 3	Penguin, UK 2014	OC_LINE3
Order Line Qty Invoiced	Quantity already invoiced	6	OC_QTY_INVOICED
Order Line Qty Ordered	Quantity already Received	6	OC_QTY_RECEIVED
Order Line Qty Received	Quantity Ordered	12	OC_QTY_ORDERED
Order Line Series	Order Line 4	Animorphs	OC_LINE4
Order Line Subject	Order Line 3	Gold	OC_LINE3
Order Line Tax Account	Tax Account for the Order Line	TAX	OC_TAX_ACCNO
Order Line Tax Code	Tax Code for the Order Line	GST	OC_TAX_CODE
Order Line Tax Rate	Tax Rate for the Order Line	10	OC_TAX_RATE
Order Line Title	Order Line 1	The journey	OC_LINE1
Order Line Total Incl Tax	Local Amount inclusive of Tax		OC_TOTAL
Order Line Unit Cost	Cost per Item of the Order Line	20.00	OC_COST
Order Number	Order Number for the Order Header and associated Order lines	4500	OH_ORDER_NO
Order Supplier	Supplier for the Order Header	DYMOCKS	OH_SUPP_NO

AUTHORITIES

These reports focus on data from the Authority module of Amlib

Example reports for this module include:

- New Subject Headings
- New Genre Headings (655) Tags for promotion
- New Series Headings from 490 or 440 Tags
- Authorities with See Also references
- Subjects with Authority Notes
- Author list – including 100 and 700 Tags (added Authors)
- Report on various Files as required

Data Element	Description	Example	Database Name – from AUTHORITY unless shown
Authority Created/Modified by	User who created or modified the Authority last	STAFF	AUTH_OPER
Authority Date Modified	Authority Date created or Date modified. Only one date Field in the Authority	22/06/2015	AUTH_DATETIME
Authority Details	Data contained within the Marc Tag	Animals - Fiction	AUTH_MARC
Authority File Date	File Date created or Date modified.	22/06/2015	FILE_DATE
Authority File Description	Description used to Name the File	SCIS 22/06	FILE_DESC
Authority File Entries	The number of entries within the File	121	FILE_QTY
Authority File Number	The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)	3554	FILE_NUMBER
Authority File Operator	File Operator (User name)	STAFF	FILE_OPER
Authority File Operator Access	Whether other Users are allowed to access the File Y/N	Y	FILE_OPER_ACCESS
Authority Has See Also?	The Authority has See Also references Y/N	Y	AUTH_HAS_SA
Authority Lib Group	Library Group Code associated with the Marc Tag	LIBRARY	AUTH_LIB_GROUP
Authority Note Text	Authority Note that guides the Cataloguer on to when to use the Authority	"Use for descriptive works on houses"	AUTH_NOTE.AUTH_NOTE_DATA
Authority Note?	Whether the Tag has an Authority Note Y/N	Y	AUTH_NOTE
Authority Search Key	Search term as held in the database table	MOLLYS REVENGE	AUTH_KEY
Authority Tag Description	Authority Description of the Authority Tag	Subject – Topical Term	TAG_TAGDEF.TT_TAG_DESC
Authority Tag Indicator 1	First Indicator for the Tag	4	AUTH_IND1
Authority Tag Indicator 2	Second indicator for the Tag	1	AUTH_IND2
Authority Tag No	Authority Tag Number	650	AUTH_TAG_NO

BIBLIOGRAPHIC

Useful for getting Bibliographic reports that gives the Catalogue Marc Tags in full. This allows for multiple Subject Headings and notes displaying.

Examples include:

- New Fiction collection along with the blurb
- New records with full catalogue display
- Subject listings for a Department – for example within the Science Department etc.
- Bibliography showing multiple Authors, including 100 (Main) and 700 (Added) Authors included
- It is possible to report on a Catalogue File if required which is useful for Subject Lists and Newly received Files through Marc Take Up

Data Element	Description	Example	Database Name - from CATALOGUE unless shown
Author	Author as shown in the 1st line of the Catalogue Display – usually Author	Winton, Tim, 1960-	CAT_STR1
Author Key	Author as stored by the Database, without punctuation,stopwords and all capitalized	WINTON TIM	CAT_KEY1
Call No	Call No as shown in the Catalogue	B/WIN	CAT_STR4
Call No Key	Call No as stored by the Database without punctuation and all capitalized	B WIN	CAT_KEY4
Catalogue Created By	Amlib Operator who created the Catalogue record	SSTAFF	CAT_CREATE_OPERATOR
Catalogue Date Created	Date the Catalogue record was created	19/01/2015	CAT_CREATE_DATETIME
Catalogue File Date	File Date created or Date modified.	22/06/2015	FILE_DATE
Catalogue File Description	Description used to Name the File	SCIS 22/06	FILE_DESC
Catalogue File Entries	The number of entries within the File	121	FILE_QTY
Catalogue File Number	The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)	3554	FILE_NUMBER
Catalogue File Operator	File Operator (User name)	STAFF	FILE_OPER
Catalogue File Operator Access	Whether other Users are allowed to access the File Y/N	Y	FILE_OPER_ACCESS
Catalogue Indicator 1	Indicator 1 as shown within the Catalogue Data Tag	4	BIBVIEW.INDICATOR1
Catalogue Indicator 2	Indicator 2 as shown within the Catalogue Data Tag	5	BIBVIEW.INDICATOR1
Catalogue Lib Group	Lib Group for the Catalogue record	LIB	CAT_LIB_GROUP
Catalogue Modified By	Catalogue last modified by this Amlib User	JSTAFF	CAT.OPERATOR
Catalogue Ref Number	Catalogue Reference ID	67819	CAT_ NO
Catalogue Tag Data	Data associated with that Marc Tag	978-1-567-24526-8	BIBVIEW.TAG_DATA

Catalogue Tag Description	Description of the Catalogue Tag	Subject – Topical Term	TT.TAG_DESCRIPTION
Catalogue Tag Number	Catalogue Tag Number	020	BIBVIEW.TAGNO
Catalogue Tag Seq	Catalogue Tag Sequence	24500	BIBVIEW.CATSEQUENCE
Catalogue Updated	Date/Time that the Catalogue was last updated. Default is to show the Date but Time can be formatted to display	29/09/2010	CAT_DATETIME
Publisher	Publisher as shown in the 3rd line of the Catalogue Display – usually Publisher	London, Puffin : 2015	CAT_STR3
Publisher Key	Publisher as shown as stored in the Database, without punctuation and capitalized	London Puffin 2016	CAT_KEY3
Title	Title as shown in the 2nd line of the Catalogue Display – usually Title	Molly's revenge	CAT_STR2
Title Key	Title as shown as stored in the Database, without punctuation, stopwords and capitalized	MOLLYS REVENGE	CAT_KEY2

BORROWER

Countless Reports can be derived from the Borrower Report Entity. Ideas may include:

- Borrower joined since a certain date
- Borrowers with a particular Type, Group or Class
- Borrowers without email addresses
- Borrowers with email addresses but Borrower Use Email is set to N
- Borrowers without email addresses but Borrower Use Email is set to Y
- Borrowers with a particular Postcode
- Borrowers with a balance greater that a certain amount
- Borrowers with Memos
- Borrowers with a certain Memo Type
- Borrower where Total Loans counts exceeds a set number (e.g. 1000)
- List of Borrowers and associated Email address

- Telephone list
- Class Lists
- Status reports – all Borrowers with Status other than OK
- Registration due to come up in the next month
- Count by Class, Type etc.

Data Element	Description	Example	Database Name - from BORROWER unless shown
Borrower Address1 Full	Borrower Address shown as displayed in the Borrower Details Window for the first line of the Address. Usually displays, all the Address lines as well as the Telephone and Postcode, concatenated to one line and split by commas	0345677654 Unit 1, 15 Haddin Way, Bedford, WA, 6115	BOR_ADDR1_TXT
Borrower Address1 Line1	Borrower Address as shown in the First Address Field of the Borrower – first line.	Unit 4	BORADDR.BA_ADDR1
Borrower Address1 Line2	Borrower Address as shown in the First Address Field of the Borrower – second line	Tiger Lane	BORADDR.BA_ADDR2
Borrower Address1 Line3	Borrower Address as shown in the First Address Field of the Borrower – third line	Chelsea	BORADDR.BA_ADDR3
Borrower Address1 Line4	Borrower Address as shown in the First Address Field of the Borrower – fourth line	Australia	BORADDR.BA_ADDR4
Borrower Address1 Postcode	Postcode as shown in the Postcode Field of the Borrower Address 1	3145	BORADDR.BA_PCODE
Borrower Address1 Telephone	Telephone as shown in the Telephone Field of the Borrower Address 1	0345677654	BORADDR.BA_TELEPHONE
Borrower Address2 Full	Borrower Address shown as displayed in the Borrower Details Window for the second line of the Address. Usually displays, all the Address lines as well as the Telephone and Postcode, concatenated to one line and split by commas for this second address.	0345677654 Unit 1, 15 Haddin Way, Bedford, WA, 6115	BOR_ADDR2_TXT
Borrower Address2, Line 1	Address 2, Line 1	13 Station St	BORADDR2.BA_ADDR1
Borrower Address2, Line 2	Address 2, Line 2	Bedford	BORADDR2.BA_ADDR2
Borrower Address2, Line 3	Address 2, Line 3	WA 6115	BORADDR2.BA_ADDR3
Borrower Address2, Line 4	Address 2, Line 4	Australia	BORADDR2.BA_ADDR4

Borrower Address2 Postcode	Postcode as shown in the Postcode Field of the Borrower Address 2		BORADDR2.BA_PCODE
Borrower Address2 Telephone	Telephone as shown in the Telephone Field of the Borrower Address 2		BORADDR2.BA_TELEPHON E
Borrower Address3 Full	Borrower Address shown as displayed in the Borrower Details Window for the third line of the Address. Usually displays, all the Address lines as well as the Telephone and Postcode, concatenated to one line and split by commas for this second address.	0345677654 Unit 1, 15 Haddin Way, Bedford, WA, 6115	BOR_ADDR3_TXT
Borrower Address3, Line 1	Address 3, Line 1	13 Station St	BORADDR3.BA_ADDR1
Borrower Address3, Line 2	Address 3, Line 2	Bedford	BORADDR3.BA_ADDR2
Borrower Address3, Line 3	Address 3, Line 3	WA 6115	BORADDR3.BA_ADDR3
Borrower Address3, Line 4	Address 3, Line 4	Australia	BORADDR3.BA_ADDR4
Borrower Address3 Postcode	Postcode as shown in the Postcode Field of the Borrower Address 3		BORADDR3.BA_PCODE
Borrower Address3 Telephone	Telephone as shown in the Telephone Field of the Borrower Address 3		BORADDR3.BA_TELEPHON E
Borrower Area Code	Borrower Area code	NW	BORADDR.BA_AREA_CD
Borrower Area Code Details	Borrower Area Description of Code	North West	AREA.AREA_NAME
Borrower Balance	Balance of money owing	24.00	BOR_OWING
Borrower Barcode	Barcode or ID of Borrower	B24256	BOR_BAR_NO
Borrower Class	Borrower Class Code	RM9	BOR_CLASS
Borrower Class Details	Class Code description	Room 9 – Mr Evans	BORCLASSES.BC_NAME
Borrower Count	Count of Borrower depending on the Filter used	25	#Function#
Borrower Date of Birth	Borrower Date of Birth (Format can be altered for the report)	21/03/1981	BOR_DOB
Borrower Email	Borrower Email address	Steven.evans@iinet.net.au	BOR_EMAIL
Borrower Exclude from Debt Collection	Borrower exclude from Debt Collection setting Y/N	N	BOR_DC_EXCLUDE
Borrower File Date	File Date created or Date modified.	22/06/2015	FILE_SET_NAMES.FILE_DAT E
Borrower File Description	Description used to Name the File	Admin Load 22/06	FILE_SET_NAMES. FILE_DESC
Borrower File Entries	The number of entries within the File	121	FILE_SET_NAMES.FILE_QTY

Borrower File Number	The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)	3554	FILE_SET_NAMES. FILE_NUMBER
Borrower File Operator	File Operator (User name)	STAFF	FILE_SET_NAMES. FILE_OPER
Borrower File Operator Access	Whether other Users are allowed to access the File Y/N	Y	FILE_SET_NAMES. FILE_OPER_ACCESS
Borrower File Date	File Date created or Date modified.	22/06/2015	FILE_SET_NAMES.FILE_DAT E
Borrower Full Name- Given, Surname	Concatenated Borrower Given and Surnames in one string	Tom Strange	#Function#
Borrower Full Name- Surname, Given	Concatenated Borrower Surname and Given Name	Strange, Tom	#Function#
Borrower Gender	Borrower Sex/Gender	F	BOR_SEX
Borrower Given Name	Borrower Given Name	Steven	BOR_GIVEN
Borrower Group	Borrower Group Code	GOLD	BOR_GROUP
Borrower Group Details	Description of Borrower Group Code	GOLD FACTION	BORGROUPS.BG_NAME
Borrower Guardian address	Borrower Guardian address as shown in Address 3	Mr Taylor, 19 The Crescent, Maylands WA 2522.	BOR_ADDR3_TXT
Borrower Initial	Initial for Middle Name	T.	BOR_INIT
Borrower Joined Date	Date that Borrower joined the Library (format can be altered within the report)	24/05/2013	BOR_START_MSHIP
Borrower Joined Location	Location Code - where Borrower joined the Library	CHEL	BOR_START_LOCATION
Borrower Joined Location Details	Location Description of the Code - where Borrower joined the Library	Chelsea	LIB_LOCATIONS31.LL_NAM E
Borrower Last Active	Date that Borrower last entered barcode for Circulation / Visit (Barcode was entered)	21/05/2015	BOR_LASTACTIVE
Borrower Last Status Update	Status last modified	21/11/2014	BOR_STATUS_DATE
Borrower Last Updated	Last time the Borrower Details were saved. Default is to show the date but time can be used to format differently	21/11/2014	BOR_DATETIME
Borrower Lib Group	Library Group for Location	LIB	BOR_LIB_GROUP
Borrower Loans Count	Borrower Total Loans as shown in the Borrower History	5	BOR_NO_ LOANS

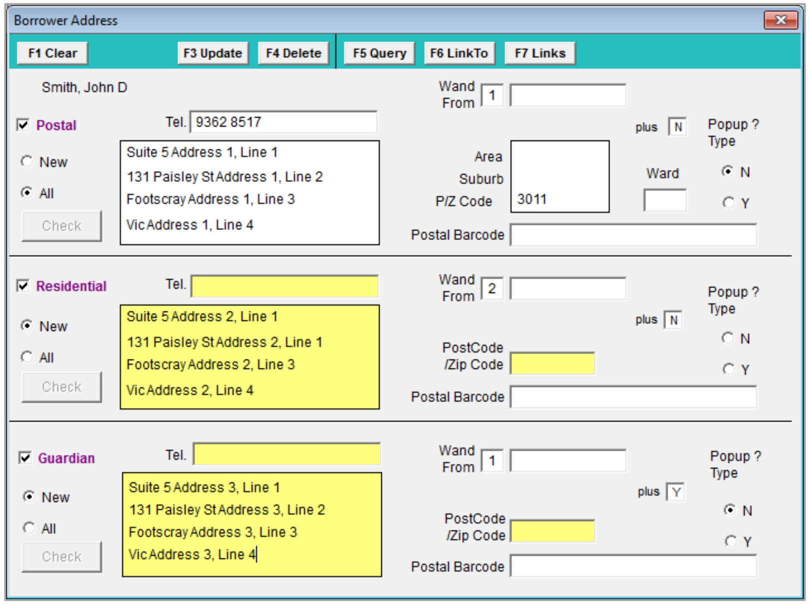
Borrower Location	Current Location of Borrower	CHEL	BOR_LOCATION
Borrower Location Details	Description of Current Borrower Location	Chelsea Public Library	LIB.LOCATIONS31.LL_NAME
Borrower Memo Date	Memo Date of Borrower's Memo. Format can be altered within report	22/04/2014	BOR_MEMOS.BM_EFF_DATE
Borrower Memo Details	Memo Text of Borrower's Memo	Left umbrella	LIB_MEMOS.LM_DESC
Borrower Memo Type	Memo Type for Borrower's Memo	ADDRESS	BOR_MEMOS.BM_TYPE
Borrower Memo Type Details	Description for Borrower Memo Type	Change of Address required	LIB_MEMOS.LM_DESC
Borrower Mobile Number	Mobile Telephone Number of Borrower	0411889933	BOR_MOBILE_TEL
Borrower PIN	Personal Identifier Number for Borrower	9999	BOR_PIN
Borrower Ref1	Data entered in Reference1 Field of Borrower. Free Text field and label can be altered through Supervisor, Installation Parameters	Page 264 Registration Book	BOR_REF1
Borrower Ref2	Data entered in Reference2 of Borrower. Free Text field and label can be altered through Supervisor, Installation Parameters	HILTOM	BOR_REF2
Borrower Registration Date	Date set for Borrower Registration	22/09/2017	BOR_REGDATE
Borrower Status	Borrower Status as currently shown within Borrower	OK	BOR_STATUS
Borrower Suburb Code	Suburb Code	BED	BA_SUBURB_CD
Borrower Suburb Code Details	Description of Suburb Code	Bedford	SUBURB.SUBURB_NAME
Borrower Surname	Borrower Surname or Family name	SMITH	BOR_SURNAME
Borrower Title	Title if given within Borrower Details	MR	BOR_TITLE
Borrower Total Renews	Number in total of Renewal as shown in Borrower History	24	BOR_NO_RENEWS
Borrower Total Reserves	Number in total of Reserves as shown in Borrower History	33	BOR_NO_RESERVES
Borrower Total Loans	Number in total of Loans as shown in Borrower History	1919	BOR_NO_LOANS
Borrower Total Visits	Number in total of Visits (Barcode used within Circulation tasks) as shown in Borrower History	50	BOR_NO_VISITS
Borrower Type	Borrower Type Code	A	BOR_TYPE
Borrower Type Details	Description given to Borrower type Code	Adult	BOR_TYPES.BT_NAME

Borrower Use Email	Borrower Use Email within Reports Y/N?	Y	BOR_USE_EMAIL
Borrower Use Mobile	Borrower Use Mobile within Reports Y/N	N	BOR_MOB_USFN
Borrower Ward Code	Ward Code of Borrower	SP	BA_WARD_CD
Borrower Ward Code Details	Description of Ward Code	South Perth	WARD.WARD_NAME

Borrower Addresses

The Headings that display in the Borrower Address Fields can be customised within Supervisor

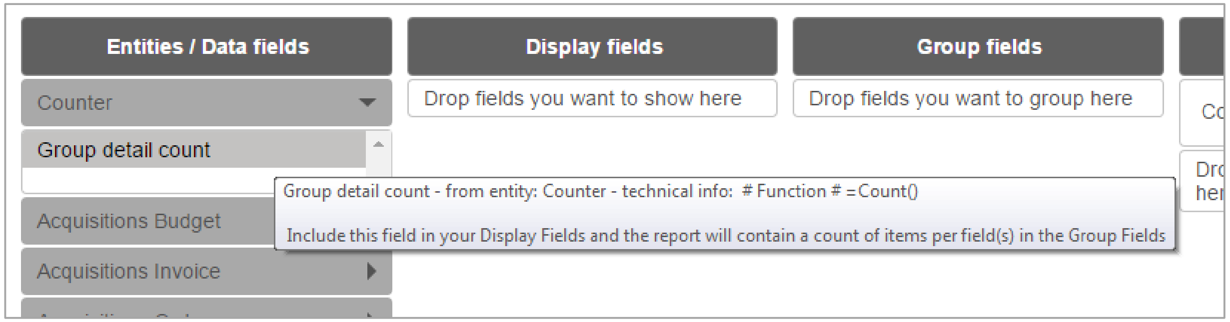
For example, first Address could be Postal



COUNTER

Enables a Count to be made of the Group Data Fields

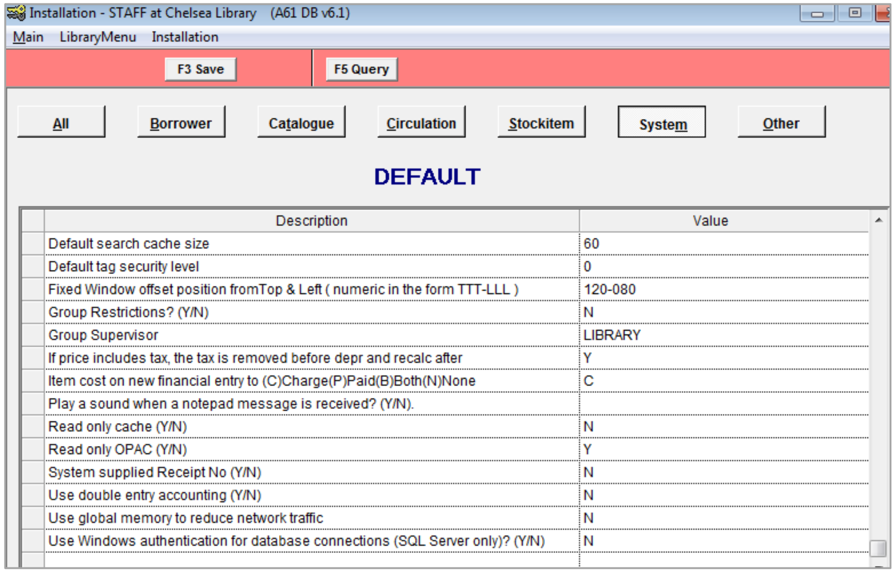
Data Element	Description	Example	Database Name
Group Details Count	Include this field in your Display Fields and the report will contain a count of items per field(s) in the Group Fields	22	#Function#



There are different Entities as associated Data Fields to use depending on whether your Database is running Single or Double Financials

To check whether you are running Single or Double entry Financials:

1. Launch the Amlib client
2. Go to **Main > Supervisor > Installation** – the Installation (DEFAULT) screen will display
3. Select the **System** tab
4. Scroll down and check the following setting: **Use Double Entry Accounting**
5. If set to **N**, then your system is set to *single-entry accounting*
6. If set to **Y**, then your system is set to *double-entry accounting*



BORROWER FINANCIAL – DOUBLE ENTRY

Field names alter depending on whether the transactions for Borrower Financials are on a Double entry or Single entry. The Fields below are for Double entry only.

This table can be combined with Borrower to get the details of Financial Transactions

A Special View (Financial Link View) of the database allows separate access to the Double and Single Financial Transactions

A Special View (Financial Link View) of the database allows separate access to the Double and Single Financial Transactions

Samples of reports

- Borrowers still owing money
- Transactions over a date period
- Receipt Nos associated with payments

Data Element	**Description**	**Example**	**Database Name From Special View created as Financial link View**
DTransaction Amount Owing	Amount owing from the transaction	20.00	FINANCIALLINKVIEW.OUTSTANDING
DTransaction Borrower Name	Borrower Name as shown in the Transaction		FINANCIALLINKVIEW.BORROWERNAME
DTransaction Charge Amount	Debit transaction amount	30.00	FINANCIALLINKVIEW.VALUE
DTransaction Comments	Comments associated with the transaction		FINANCIALLINKVIEW.COMMENTS
DTransaction Credit or Debit	Whether the transaction was a CR - Credit (payment) or DB - Debit (charge)	CR	FINANCIALLINKVIEW.CRDB
DTransaction Date	Date for the Transaction – Format can be altered within the report	15/04/2015	FINANCIALLINKVIEW.DATEENTERED
DTransaction Invoice Date	Date for the Invoice	13/04/2015	FINANCIALLINKVIEW.INVDATE
DTransaction Invoice Number	Invoice Number included in the Transaction	13667	FINANCIALLINKVIEW.INVNUMBER
DTransaction Item Barcode	Associated Stockitem barcode for transaction		FINANCIALLINKVIEW.ITEMBARCODE
DTransaction Item Title	Associated Stockitem Title for transaction	The high tide	FINANCIALLINKVIEW.ITEMTITLE

DTransaction Last Modified	Date the Transaction was modified	13/04/2015	FINANCIALLINKVIEW.DATEMODIFIED
DTransaction Location	Location Code at which Transaction occurred	Chelsea	FINANCIALLINKVIEW.LOCATION
DTransaction Location Details	Description of Transaction Location Code	Chelsea Public Library	LIBLOCATIONS16 - LLNAME
DTransaction Paid	Paid amount	10.00	FINANCIALLINKVIEW.PAID
DTransaction Paid Calculation	Paid amount Amount paid calculation	20.00	#Function#
DTransaction Quantity	Quantity of items/days	30	FINANCIALLINKVIEW.QTY
DTransaction Receipt No	Receipt Number of payment	76544	FINANCIALLINKVIEW.RECEIPTNUMBER
DTransaction Type	Transaction Type Code	FINE	FINANCIALLINKVIEW.TYPE
DTransaction Type Details	Description of Transaction Type Code	OVERDUE FINE	FINTYPES.FIN_DESC

BORROWER FINANCIAL – SINGLE ENTRY

There is a special Data element of “Transaction Amount Owing which can be useful for Filtering

Samples of reports

- Borrowers still owing money
- Transactions over a date period
- Receipt Nos associated with payments

Data Element	**Description**	**Example**	**Database Name - from FIN_TRANS unless shown**
Transaction Amount Owing	Amount owing from the transaction	20.00	#Function#
Transaction Borrower Name	Borrower Name as shown in the Transaction	Smith, Julian	FIN_NAME
Transaction Charge Amount	Debit transaction amount	30.00	FIN_VALUE
Transaction Comments	Comments associated with the transaction	Renewed item was overdue	FIN_COMMENTS
Transaction Credit or Debit	Whether the transaction was a CR - Credit (payment) or DB - Debit (charge)	CR	FIN_CR
Transaction Date	Date for the Transaction – Format can be altered within the report	15/04/2015	FIN_DATE

Transaction Invoice Date	Date for the Invoice	13/04/2015	FIN_INV_DATE
Transaction Invoice Number	Invoice Number included in the Transaction	13667	FIN_INV_NO
Transaction Item Barcode	Associated Stockitem barcode for transaction	I89321	FIN_ITEM
Transaction Item Title	Associated Stockitem Title for transaction	The high tide	FIN_TITLE
Transaction Last Modified	Date the Transaction was modified	13/04/2015	FIN_DATE_MOD
Transaction Location	Location Code at which Transaction occurred	Chelsea	FIN_LOC
Transaction Location Details	Description of Transaction Location Code	Chelsea Public Library	LIBLOCATIONS4.LLNAME
Transaction Paid	Paid amount	10.00	FIN_PAID
Transaction Quantity	Quantity of items/days	30	FIN_QTY
Transaction Receipt No	Receipt Number of payment	76544	FIN_RECEIPT
Transaction Type	Transaction Type Code	FINE	FIN_TYPE
Transaction Type Details	Description of Transaction Type Code	OVERDUE FINE	FIN_TYPES.FIN_DESC

BORROWER HISTORY

Borrower History allows the reporting of items associated with Borrowers through History. Once selected it is possible to also select from the Borrower Entity. These reports will only work if the READING history is kept. Many sites use the RETURN history instead which actually comes from the Stockitem History so it maybe preferable to use Stockitem History to get the results required

Samples may include

- List of Items issued by a Class
- Count of items issued by a Borrower Type
- Borrowers activity between a date range
- List of Accounts sent through Report History

Data Element	**Description**	**Example**	**Database Name BOR_HISTORY – unless shown**
Borrower History Comments	Comment recorded within History	"980393755 Mindpower : set your sights on success"	BH_COMMENTS
Borrower History Date	Date as displayed in History Table. **Note: Date and time element	6 March 2015 9:00AM	BH_DATE
Borrower History Title	Item Title	The Gift Horse	STK_TITLE
Borrower History Type	There are choices of Borrower history types	ACCOUNT,ACCT, CLAIMRET, READING, RESADV, RESCANC	BH_TYPE

**Note: Date and time element. When Filtering with a Date that also includes a time, it is better to use a range of DateS rather than an equal.

For example Borrower History Date >= 15/04/2015 AND Borrower History Date < 16/04/2015 rather than Borrower History Date = 15/04/2015 so that all time periods are correctly accounted

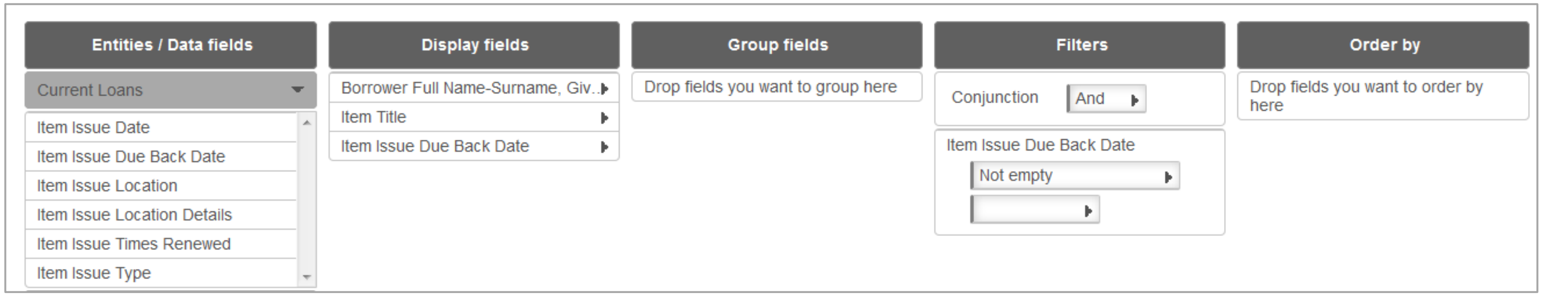
CATALOGUE

There is no separate Catalogue Entity - To get Catalogue information use the Bibliographic Entity as the Date Catalogue created is included within that Entity and this entity gives much more scope for display.

CURRENT LOANS

Loans are accessed from the Borrower Entity and Stockitem Entity to get the details required. For example Issue Date and Issue Date Due are in the Stockitem Entity

Data Element	**Description**	**Example**	**Database Name LOANS.VIEW – unless shown**
Item Issue Date	Date the item was issued	12/02/2015. Can include Time element if Format set	STK_ISS_DATE
Item Issue Due Back Date	Date the item is due for return	12/03/2015	STK_ISS_DUE
Item Issue Location	Location Code at which the Issue transaction took place	CHEL	STK_ISS_LOC
Item Issue Location Details	Description of the Location Code where the Issue took place	Chelsea Public Library	LIB_LOCATIONS.LL_NAME
Item Issue Times Renewed			STK_ISSUE_RENEWED
Item Issue Type	How the Issue was processed – Hourly, Overnight, Daily, Term, Semester, Yearly	D	STK_ISSUE_TYPE



OPAC REQUESTS OR SUGGESTS

These requests are derived from Netopacs and/or OpenOPAC. This Report Type is from the Supervisor/Opac Suggests Table and can include the Request details and the Library Response

Data Element	**Description**	**Example**	**Database Name** **OPAC_USER_COMMENTS unless shown**
OPAC Accept Cost	Whether patron will accept cost Y?N	N	OUC_COSTACCEPT
OPAC Author	Details entered on Line 2 of the form – usually Author		OUC_LINE2
OPAC Call No	Details entered on Line 6 of the form – usually Call No		OUC_ LINE6
OPAC Comments	Comments entered for the request		OUC_COMMENTS
OPAC Date	Date of the request		OUC_DATE
OPAC Estimated Cost	Estimated cost of the request		OUC_ESTCOST
OPAC Form code	Form code of the item requested	DVD	OUC_FORM
OPAC ISBN	ISBN of the item requested		OUC_ISBN
OPAC Library Response	Notes given by the Library Staff as a response	Your request has been received. We will respond by the end of the week	OUCR_LIBRESPONSE
OPAC Location	Location Code of the Request	CHEL	OUC_LOCATION
OPAC Location Details	Location Description of the Code from the Request	Chelsea Public Library	LIBLOCATIONS8.LL_NAME
OPAC Notes	Notes from the Request	Urgent request	OUC_NOTES
OPAC Publisher	Details entered on Line 6 of the form – usually Call No	Penguin, London	OUC_LINE3
OPAC Reply Date	Reply date of the response given by Staff	Not used 15/06/2015	OUCR_DATE
OPAC Reply Type	Reply type of the response given by Staff	Not used	OUCR_TYPE
OPAC Series	Details entered on Line 4 of the form – usually Series	Animorphs	OUC_LINE4
OPAC Subject	Details entered on Line 5 of the form – usually Subject	Family - Fiction	OUC_LINE5
OPAC Title	Details entered on Line 1 of the form – usually Type	Breathe	OUC_LINE1
OPAC Type	Request details: All are Item now so **not used**	Item, Borrower or Opac.	OUC_TYPE

PERIODICALS

Periodicals have 4 main levels all of which are available under the Periodical Master Headings:

- Main Periodical
- Subscription
- Issue details
- Copy details

Useful reports include:

- Current Periodicals with a current Subscription
- Issues with a Claim
- Cost of Subscription for each Periodical
- List of Main Titles
- Issues associated with a certain Periodical
- Renewals due in the next 3 months
- Items received since a certain date

Data Element	Description	Example	Database Name
Periodical Call No	Call No as shown on the Copies window	REF PER NAT	PER_COPY.PC_CALL_NO
Periodical Circulation List	Circulation List	1234	PER_SUBS.PS_CIRC_LIST
Periodical Copies Due	The Number of Copies of Issues Due still due, on the Subscriptions/Issues window of Amlib	1	PER_ISSUES.PI_QTY_SUB
Periodical Copies Per Issue	The Number Copies Issues Due in total. This can be seen on the Subscriptions window	2	PER_SUBS.PS_QTY_DUE
Periodical Copies Received	The Number Issues Received. This can be seen on the Subscriptions/Issues window of Amlib	1	PER_ISSUES.PI_QTY_RECD
Periodical Copy Barcode	Barcode of the Stockitem received from Periodical	I984332	PER_COPY.PC_STK_ITEM_NO
Periodical Copy Title	Copy Description as shown in the Periodical Module (Issue Details)	Volume 49 Index No 1-4 Supplement to	PER_COPY.PC_DESCRIPTION

		Reading Time Vol 50 No 1 2006	
Periodical Date Recd	Date that the copy was received	12/03/2015	PER_COPY.PC_DATE_RECD
Periodical Description	Description of the Issue	Vol 1. No 16, July 2015	PER_ISSUES.PI_DESCRIPTION
Periodical Form Code	Form Code as set in Stock Defaults	PER	PERIODICAL.PER_STK_FORM
Periodical Frequency	Frequency for the Periodical Subscription	M	PERIODICAL.PER_FREQ
Periodical ISSN	ISSN as shown on the Periodical	6554-1223	PERIODICAL.PER.ISSN
Periodical Issue Catalogue	Catalogue Reference attached to a Periodical Issue	389112	PER_ISSUES.PI_CAT_REF
Periodical Issue Claim	Where a Claim has been made against an Issue Y/N	N	PER_ISSUES.PI_CLAIM
Periodical Issues Per Subs	The Number of Issues for each Subscription	12	PER_SUBS.PS_QTY_ISSUES
Periodical Item Stats Code	Form Code as set in Stock Defaults	JPER	PERIODICAL.PER_STATS_CODE
Periodical Main Title	The Title given to the Main Periodical Details	Better homes and gardens	PERIODICAL.PER_TITLE
Periodical Subs Comments	Comments related to the Subscription	Trial in 2015	PER_SUBS.PS_COMMENTS
Periodical Subs Cost	Cost for the Subscription	144.00	PER_SUBS.PS_COST
Periodical Subs Cost per Issue	Subscription cost per Issue as calculated by the No of Issues and Subscription cost	12.50	PER_SUBS.PS_COST_ISSUE
Periodical Subs End Date	The final date for the Subscription	31/12/2015	PER_SUBS.PS_END_DATE
Periodical Subs Lib Group	The Library Group for the Subscription	LIB	PER_SUBS.PS_LIB_GROUP
Periodical Subs Location	The Location Code for the Subscription	CHEL	PER_SUBS.PS_LL_CODE
Periodical Subs Location Details	The Description given to the Location Code of the Subscription	Chelsea Public Library	LIB_LOCATIONS7.LL_NAME
Periodical Subs Renewal Date	The Renewal Date given to the Subscription	15/11/2015	PER_SUBS.PS_RENEW_DATE
Periodical Subs Start Date	The beginning date of the Subscription	01/01/2015	PER_SUBS.PS_START_DATE
Periodical Subs Supplier	The Supplier Code for the Subscription	CNEW	PER_SUBS.PS_SUPP_NO
Periodical Supplier Details	The Description given to the Supplier Code	Chelsea Newsagent	PER_SUPPLIER.PS_COMPANY

RESERVATIONS

Can combine with Borrower to get the current reservations and reservation statuses

- Reservations with status of Printed - Printed several days ago but not collected
- Reservations with status of Return
- Reservations placed at a location
- Reservations to be collected at a location
- Reservations by an individual
- Counts of Borrowers - No of reservations determined by the filter
- Counts of Items - No of reservations determined by the filter
- Reservation Placed in the past week/month etc.
- Reservations passed the Expiry date
- Queue No of individuals

Data Element	Description	Example	Database Name – Reservations Table unless shown otherwise
Reservation All or First	Whether Reservation was placed for all copies or the first copy only F - First/A-All	F	RES_ALL_OR_FIRST
Reservation Collection Location	Location code at which the Reservations will be collected	CHEL	RES_COLL_LOCATION
Reservation Collection Location Details	Location Description assigned to the code at which the Reservations will be collected	Chelsea Public Library	LIB_LOCATIONS91.LL_NAME
Reservation Date Placed	Date the reservations were placed	12/05/2015	RES_DATE
Reservation Expiry Date	Date the reservations expired (set by Supervisor/Installation parameters)	19/05/2015	RES_EXPIRY
Reservation Item Title	Item Title for the Reservation	Breath	RESERVATIONSTOCKITEMVIEW.STK_LINE1
Reservation Placed Location	Location code at which the Reservations were placed	CHEL	RES_PLACED_LOC
Reservation Placed Location Details	Location Description assigned to the code at which the Reservations were placed	Chelsea Public Library	LIB_LOCATIONS9.LL_NAME
Reservation Position in Queue	Queue position for the reservation. Generally in sets of 5 (5,10,15 etc)	10	RES_PRIORITY

Reservation Status	Status of Reservation: ILLS, ON LOAN, ORDER, PRINTED, RETURN, SHELF, TRANSFER	PRINTED	RES_STATUS
Reservation User Placed	Amlib Operator who placed the reserve	STAFF	RES_WHO_PLACED

STATISTICS

Statistics can be shown effectively as graphs

- Issues per month for the last year
- All activity this Financial year

Data Element	Description	Example	Database Name – STATS unless shown otherwise
Statistics Borrower Area	Borrower Area Code at the time of the Statistics collection	Metro	STATS_AREA_CD
Statistics Borrower Area Details	Description of the Area Code	Metropolitan	AREA.AREA_NAME
Statistics Borrower Class	Borrower Class Code at the time of the Statistics collection	Rm5	STATS_BOR_CLASS
Statistics Borrower Class Details	Description of the Class Code	Room 5 – Mr Davies	BORCLASSES.BC_NAME
Statistics Borrower Group	Borrower Group Code at the time of the Statistics collection	E	STATS_BOR_GROUP
Statistics Borrower Group Details	Description of the Class Code	Endeavour	BORGROUPS.BG_NAME
Statistics Borrower Suburb	Borrower Suburb Code at the time of the Statistics collection	BEL	STATS_SUBURB
Statistics Borrower Suburb Details	Description of the Suburb Code	Belmont	SUBURBS.SUBURBS_NAME
Statistics Borrower Type	Borrower Type Code at the time of the Statistics collection	A	STATS_BOR_TYPE
Statistics Borrower Type Details	Description of the Borrower Type Code	Adult	BORTYPES.BT_NAME
Statistics Borrower Ward	Borrower Ward Code at the time of the Statistics collection	NW	STATS_WARD
Statistics Borrower Ward Details	Description of the Borrower Ward Code	North West Metro	WARDS.WARD_NAME
Statistics Count	Count calculated brought back from the Database	215	STATS_COUNT
Statistics Day 0123456	Day of collection of statistics 0 Sunday, 1 Monday etc.	1	STATS_DAY
Statistics Hour 0 24	Hour of collection of statistics in 24 hour format	12	STATS_HOUR
Statistics Item Form	Item Form Code at the time of the Statistics collection	DVD	STATS_STK_FORM
Statistics Item Stats Code	Item Stats Code at the time of the Statistics collection	AF	STATS_STK_CODE
Statistics Item Stats Code Details	Description of the Item Stats Code	Adult Fiction	STK_CODES.STATS_STK_CODE00
Statistics Location	Location Code where the Statistics were collected	LIB	STATS_LL_CODE

Statistics Location Details	Description of the Location Code where statistics collected	Chelsea Public Library	LIB_LOCATIONS.LL_NAME
Statistics Money Amount	Money amount collected	15.00	STATS_MONEY
Statistics Month 0 12	Month of collection of statistics 1 – January to 12 December	IN 10,11,12	STATS_MONTH
Statistics Transaction Date	Date of collection of statistics by specific date	< 31/12/2015	STATS_DATE
Statistics Type 05 06 etc.	Number used for collection of Statistics. See Supervisor, Stats Params (05 – Issues, 06 – Renewals etc.)	05	STATS_TYPE
Statistics Type Details	Description used for Stats parameters	Issues	STATS_CODES.STATS_DESCRIPTION
Statistics Year 2014 etc.	Year of collection of statistics	2015	STATS_YEAR

STOCK HISTORY

Stock History relates to the Item History and provides information in relation to the History set in each Stockitem.

This entity can be used in relation to the Stockitem Entity to get the necessary Data Fields such as Title, Call No etc.

It can also be used in relation to Borrower to get the Name, Borrower Type, Class etc. as required.

Example of reports could include:

- History of a particular item
- History by Borrower Type
- History by Item Type
- History filtered by the History Type

Data Element	**Description**	**Example**	**Database Name – uses STK_HISTORY Table unless shown otherwise**
Stock History Borrower Barcode	Borrower Barcode for the History Transaction	B44332	SH_BOR_NO

Stock History Comments	Comments recorded for the History transaction	Circ issue at VIC by IS1 to RICCI, DEANNE Due: 06/11/2007 11:59 PM	SH_COMMENTS
Stock History Date	Date of the History transaction. It is possible to alter the Format of this to include the hour and minutes as this is kept by the History	dd/mm/yyyy 22/08/2015 dd/mm/yyyy hh:mm tt 22/08/2015 09:54 AM	SH_DATE
Stock History Item	Item Barcode for the History Transaction	I33442	SH_STK_ITEM_NO
Stock History Type	The History Type available includes ORDER, PRICE, TRANSFER, RENEW, RETURN, ISSUE, INHOUSE, RES.HIST	ISSUE	SH_TYPE

STOCKITEMS

From simple lists to complex lists there are many possibilities. For example Items with a Process code showing the cost

There are huge numbers of reports that can be gained using Stockitem on its own or in combination with other Entities – for example with Borrower, History, Reservations etc.

- New items
- Items with Call Set
- Items with Cost
- Items with a specific Process, Form, Stats Code etc.
- Items at a particular Location
- Items without a Catalogue Reference
- Items Count by Form
- Items Count by Stats Code
- Items On Loan
- Items Not on Loan
- On Order items
- Overdue List
- Overdue list of Items issued by a Class or Type
- Items on loan
- Items on loan by Class or Type
- ILL items on loan
- Overdue ILL
- Items issued from a particular Location
- Items issued on a particular Day
- Items due back on a particular Day
- Shelf list of items overdue

Data Element	Description	Example	Database Name – uses STK_ITEM Table unless shown otherwise
Item Author	Stock Line 2 of Stockitem Display – usually Author	Winton, Tim.	STK_LINE2
Item Barcode	Item Barcode as shown on the Stockitem window	I635589	STK_ITEM_NO
Item Call No	Stock Line 6 of Stockitem Display – usually Call No	F WIN	STK_LINE6
Item Call Set	Item Call Set as set via the Call Set Table	FOLK	STK_CALL_SET
Item Call Set Details	Description of the Call set as set on the Call Set Table	Folktales	STK_CALL_SETS.SC_DESC
Item Catalogue Reference	Catalogue reference attached to the Stockitem	139032	STK_CAT_REF
Item Convert Value	Item Convert Value as shown on the Stockitem Window. This Field can have a different Heading as set in Supervisor/Installation	Signed by Author	STK_CONVERT_VALUE
Item Cost	Item Current Cost as shown in the Stockitem Window	25.50	STK_COST
Item Date Accessioned	Date accessioned as shown in the Stockitem Window	12/05/2015	STK_DATE_ACC
Item Date Modified	Date the item was last modified	01/01/2015	STK_DATETIME
Item Date Received	Date the item was received	31/12/2015	STK_DATE_RECD
Item Description	Item Description Value as shown on the Stockitem Window. This Field can have a different Heading as set in Supervisor/Installation	Part of a Big Book set	STK_DESCRIPTION
Item Edition	Edition Field as shown on the Stockitem window. Sometimes shows the Year of publication	2nd ed.	STK_EDITION
Item File Date	File Date created or Date modified.	22/06/2015	FILE_SET_NAMES1.FILE_DATE
Item File Description	Description used to Name the File	Admin Load 22/06	FILE_SET_NAMES1. FILE_DESC
Item File Entries	The number of entries within the File	121	FILE_SET_NAMES1.FILE_QTY
Item File Number	The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)	3554	FILE_SET_NAMES1. FILE_NUMBER
Item File Operator	File Operator (User name)	STAFF	FILE_SET_NAMES1. FILE_OPER
Item File Operator Access	Whether other Users are allowed to access the File Y/N	Y	FILE_SET_NAMES1. FILE_OPER_ACCESS
Item Floor Location	Floor location as shown on the Stockitem window	Map drawer	STK_LOC_FLOOR
Item For Loan?	Whether the item is allowed to be loaned or not. Y/N	N	STK_FOR_LOAN

Item Form	Item Form Code as currently set. Usually the basis for the Loan parameters	LP	STK_FORM
Item Form Details	Description of the Item Form Code	Large Print Book	STK_FORMS.STK_FORM_DESC
Item is on Loan?	Whether the item is on loan or not. Y/N	Y	STK_IS_ON_LOAN
Item is on Order?	Whether the item is on Order. Y/N	N	STK_IS_ON_ORDER
Item is on Reserve?	Whether the item is reserved. Y/N	Y	STK_IS_RESERVED
Item Last Active Date	Date of last active Circulation activity	12/05/2015	STK_LAST_ACTIVE
Item Last Depreciation Date	Date of the last depreciation process	30/06/2015	STK_LAST_DEP
Item Library Group	Library Group related to the permanent Location	LIB	STK_LIB_GROUP
Item Loan Type	Item Loan Type if this applies. This is set on the Stockitem window and overwrites normal borrowing privileges	OV	STK_LOAN_TYPE
Item Memo Date	Item Memo Date created	23/06/2015	STK_MEMOS.SM_EFF_DATE
Item Memo Details	Item Memo Details contained in the Memo	Item is damaged. Repair on return	STK_MEMOS.SM_DATA
Item Memo Type	Memo Type from Supervisor/Memo Types Table used by Item	SBARCODE	STK_MEMOS.SM_TYPE
Item Memo Type Details	Memo Type Description from Supervisor/Memo Types Table for the Memo Type	System change barcode rule	LIB_MEMOS1.LM_DESC
Item Original Cost	Original Cost as set in Stockitem/History	15.00	STK_ORIG_COST
Item Perm Location	Permanent Location Code currently assigned to the item	CHEL	STK_LOC_PERM
Item Perm Location Details	Description of the Permanent Location Code	Chelsea Public Library	LIB_LOCATIONS122.LL_NAME
Item Process Code	Process or Status Code as set on the Stockitem window	MISSING	STK_PROCESS
Item Process Date	Date the process was assigned to the Stockitem	01/01/2013	STK_PROCESS_DATE
Item Publisher	Line 5 of the Stockitem Display – usually Publisher	London : Penguin, 2019.	STK_LINE5
Item Series	Line 4 of the Stockitem Display – usually Series	Animorphs v6.	STK_LINE4
Item Show in Opac?	Whether the Stockitem can be displayed in Opac Y/N	Y	STK_OPAC_SHOW
Item Source	The Origin Code of the Stockitem. Some sites use this to populate a Supplier or funding	DYM	STK_ITEM_ORIGIN
Item Stats Code	The Stats Code of the Stockitem	JF	STK_ITEM_STATS
Item Stats Code Details	The description of the Stockitem Stats Code	Junior Fiction	STK_CODES.STK_CODE_DESC

Item Stocktake Date	The date of the last Stocktake as shown in Stockitem History/Stocktake	01/12/2014	STK_LAST_TAKE
Item Subject	Line 3 of the Stockitem Display – usually Subject. Note that the Stockitem only shows 1 of the Subjects from the Catalogue	Family - Fiction	STK_LINE3
Item Temp Location	The Temporary Location Code that is displayed on the Stockitem window	ARM	STK_LOC_TEMP
Item Temp Location Details	The description of the Temporary Location Code	Armadale Public Library	LIB_LOCATIONS121.LL_NAME
Item Times Borrowed Total	The number of times borrowed since the beginning or since Period set as displayed in the Stockitem History	360	STK_TIMES_BORROWED
Item Times Renewed Total	The number of times renewed since the beginning or since Period set as displayed in the Stockitem History	24	STK_TIMES_RENEWED
Item Times Reserved Total	The number of times reserved since the beginning or since Period set as displayed in the Stockitem History	29	STK_TIMES_RESERVED
Item Title	The Main Title of the item	Black horse island	STK_LINE1
Item Type	Whether the Item is a Normal item, a Master or a Subsidiary. Note: Master and Subsidiary items are usually given to Kits and their Contents	Normal	STK_ITEM_TYPE
Item Volume	The Volume as shown on the Stockitem. This is sometimes set to the Series No	V22	STK_VOLUME

APPENDIX 2: TROUBLE SHOOTING AND TIPS

Overloading Memory

If too much data is retrieved there is a danger of overloading the Memory and receiving an error

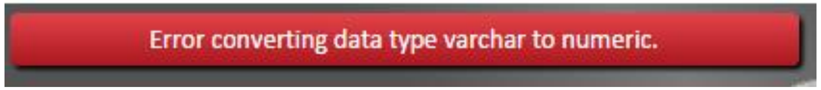
If a lot of data is to be retrieved or an out of memory message is received, work out how to overcome this by filtering the data in sections. For example, Authorities that start with an "A", Stock split up by Stats codes, Borrowers according to Borrower Types etc. Depending on what the data is, there can be advantages on receiving the data in logical sections

Getting Function errors

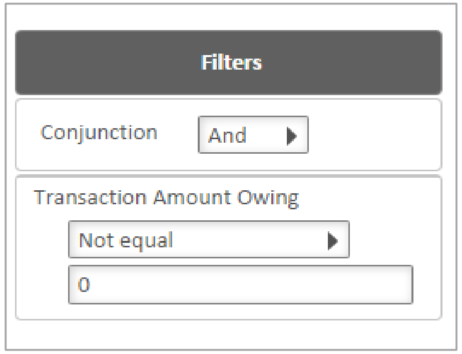
Invalid column name

Maybe the Order Data Field has not been used in the Group of Display Field. To rectify select the Order Data Field to that which has been used as a Group or Display Field

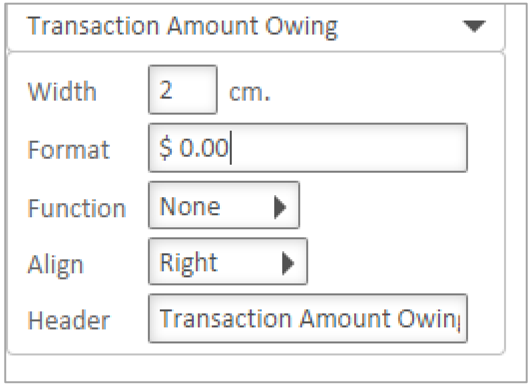
Error converting data type vachar to numberic



The format entered for the number is not able to be filtered. It is important the Format used for the Filter is entered without extra formatting



Note: You can use symbols $ 0.00 when setting the format for the Display Fields



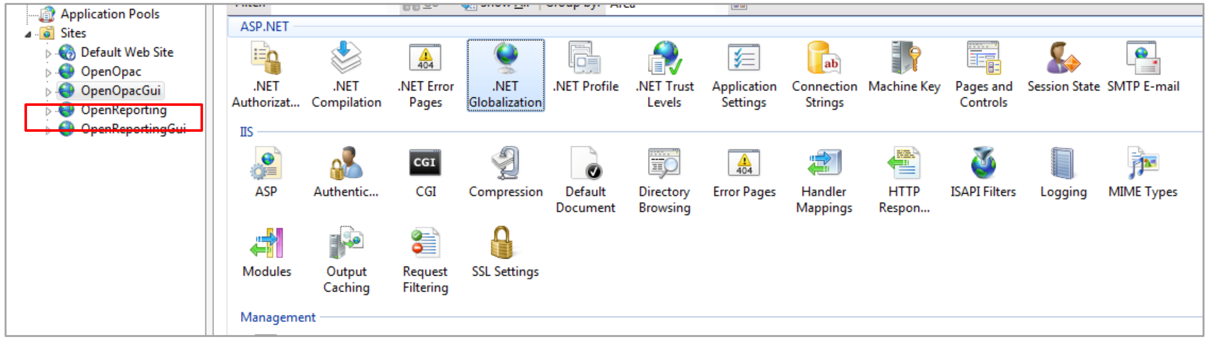
APPENDIX 3: COMMON DATE/TIME FORMATS

dd	The day of the month, from 01 through 31	01
ddd	The abbreviated name of the day of the week	Mon
dddd	The full name of the day of the week	Monday
hh	The hour, using a 12-hour clock from 01 to 12.	01
HH	The hour, using a 24-hour clock from 0 to 23	13
mm	The minute, from 00 through 59	09
MM	The month, from 01 through 12	06
MMM	The abbreviated name of the month	Jun
MMMM	The full name of the month	June
ss	The second, from 00 through 59	09
tt	The AM/PM designator	PM
yy	The year, from 00 to 99	15
yyyy	The year as a four-digit number	2009
:	The time separator	hh: mm
/	The date separator	16/08/2009

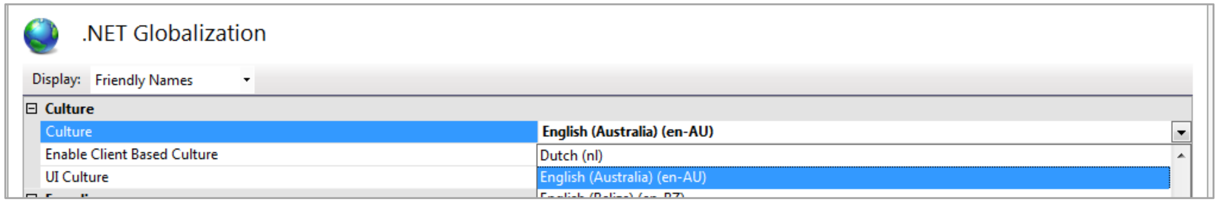
APPENDIX 4: LANGUAGE CONTROL FOR TIME SETTINGS

To control the language setting of the Browsers used for *OpenReports*, it is possible to change two settings in IIS [Internet Information Services manager]. This will ensure that the Clock in the Report Scheduler shows the correct time in AM/PM or 24 hour clock format

1. Open IIS7
2. Highlight **OpenReportGui** in the Sites folder on the left
3. Double click **Net.Globalisation** icon from the ASP.Net section of **OpenReportGui** Home

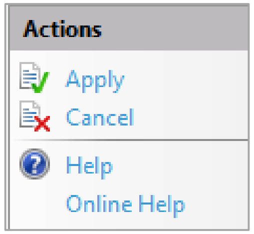


4. The **.NET Globalization** window will display
5. Use the drop-down menu for **Culture**



6. Select **English (Australia) (en-AU)** from the list
7. Use the drop-down menu for **UI Culture**

8. Select **English (Australia) (en-AU)** from the list
9. Once both are configured, select **Apply from the Actions section** in the right hand section



10. **Stop and restart IIS** before logging into OpenReports