OPENReports
User Guide & Training Manual

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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 your Server name or Localhost and replace the xx as indicated with the port number you have assigned to OpenReports earlier:


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 1\textsuperscript{st} line to be AMCAT, the second line to be AMLIB, the third line will be AMLOCAL and the fourth line will be AMSTATS.

![Database Connection String Table]

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:

![Database Type Selection]

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

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

Report successfully 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

Attention

Are you sure you want to delete this report?

Yes No

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 Window Screenshot]

**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

![SQL Screenshot]
### Show details

- **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)

  ![Show details](image)

- **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
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.

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

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
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.
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

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...

<table>
<thead>
<tr>
<th>Borrower Full Name-Given, Surname</th>
<th>Borrower Type: Y09</th>
<th>Borrower Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Judea Anset</td>
<td>AUDIT</td>
<td>04/12/1999</td>
</tr>
<tr>
<td>Haylee Gardner</td>
<td>30/05/2000</td>
<td>CHI</td>
</tr>
<tr>
<td>Ebony Wong</td>
<td>13/12/1999</td>
<td>CHI</td>
</tr>
<tr>
<td>Laura Walsh</td>
<td>04/04/2000</td>
<td>CHI</td>
</tr>
<tr>
<td>Kazi La-Rue</td>
<td>01/10/2000</td>
<td>CHI</td>
</tr>
<tr>
<td>Callum Inkster</td>
<td>14/08/1999</td>
<td>CRO</td>
</tr>
<tr>
<td>Dylan Ball</td>
<td>11/06/2000</td>
<td>CRO</td>
</tr>
<tr>
<td>Alyssa Henderson</td>
<td>10/11/1999</td>
<td>DUT</td>
</tr>
</tbody>
</table>
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:

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.

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

<table>
<thead>
<tr>
<th>Authority Details</th>
<th>Tag No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stoner, Casey.</td>
<td>600</td>
</tr>
<tr>
<td>Sauces</td>
<td>650</td>
</tr>
<tr>
<td>Science</td>
<td>650</td>
</tr>
<tr>
<td>Spiders</td>
<td>650</td>
</tr>
<tr>
<td>Spain - Civilization - 20th century.</td>
<td>651</td>
</tr>
<tr>
<td>Spain - Description and travel</td>
<td>651</td>
</tr>
</tbody>
</table>

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

![Borrower History Type Filter]

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

![Filters]

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

![Filters]

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

   ![Calendar Image]

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

   ![Filter Image]

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**

![Screen display](image)

**PDF**

![PDF display](image)
Excel

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Name</th>
<th>Item Title</th>
<th>Item Author</th>
<th>Item Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BK</td>
<td>Cricket: the men and the game</td>
<td>Tony Greig</td>
<td>Rogers, Barry</td>
</tr>
<tr>
<td>2</td>
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<td>Rogers, Barry</td>
</tr>
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<td>Tony Greig</td>
<td>Rogers, Barry</td>
</tr>
</tbody>
</table>

Word / WordPad

**Tides**

<table>
<thead>
<tr>
<th>Catalogue</th>
<th>Title</th>
<th>Ref Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>31870</td>
<td>The original Olympics</td>
<td>40384</td>
</tr>
<tr>
<td></td>
<td>Berlin Olympics</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The winter Olympics</td>
<td>41456</td>
</tr>
<tr>
<td></td>
<td>Nick Hunter</td>
<td></td>
</tr>
</tbody>
</table>

Last Updated: 10 February 2016
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

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
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
To Remove the Logo

1. Click **Remove**
2. A message will display at the top of the Window to show it is deleted
3. It will show that no custom Logo has been uploaded
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 SMTP 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

<table>
<thead>
<tr>
<th>Log level</th>
<th>Error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Info</td>
</tr>
<tr>
<td></td>
<td>Debug</td>
</tr>
<tr>
<td></td>
<td>Warn</td>
</tr>
<tr>
<td></td>
<td>Error</td>
</tr>
</tbody>
</table>

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**

![Chart Options](image)

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

![Chart Type](image)

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

![Chart Palette](image)

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

![Preview button]

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

![Back button]

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.

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.

**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 **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. **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**

2. Highlight the first Field for the Borrower. This could be **Full Name - Surname, Given**

3. Drag and drop into the Display Field Table. Alter the heading again if required, for example to **Borrower**

4. 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.

   ![Display Fields Diagram](image)

5. 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

   ![Display Fields Diagram](image)

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
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 Item
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 **Sql** 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 Group 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 Bor 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

![Borrower History Date](image)

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

![Borrower History Type](image)

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
1. Select Preview to view the Report

<table>
<thead>
<tr>
<th>Borrower History Type</th>
<th>Reading Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Borrower History Type A</strong></td>
<td>10. Frost, Taylor</td>
</tr>
<tr>
<td>READING</td>
<td>7. Husain, Marvne</td>
</tr>
<tr>
<td>READING</td>
<td>6. Cameron, Katrina</td>
</tr>
<tr>
<td>READING</td>
<td>5. Liu, Angela</td>
</tr>
<tr>
<td>READING</td>
<td>2. Humfrink, Sarah</td>
</tr>
<tr>
<td><strong>Borrower History Type B</strong></td>
<td>1. Connolly, Lee</td>
</tr>
<tr>
<td>READING</td>
<td>1. Ho,</td>
</tr>
<tr>
<td><strong>Borrower History Type C</strong></td>
<td>3. Hurst, John</td>
</tr>
<tr>
<td>READING</td>
<td>3. Hone, Alison</td>
</tr>
<tr>
<td>READING</td>
<td>3. Patchett, Sarah</td>
</tr>
<tr>
<td>READING</td>
<td>1. Daniels, John</td>
</tr>
</tbody>
</table>

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
### Save

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

#### Top 10 Borrowers

<table>
<thead>
<tr>
<th>Borrower History Type</th>
<th>Group detail count</th>
<th>Borrower Full Name - Surname, Given</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Borrower Type A</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>READING</td>
<td>10</td>
<td>Frost, Taylor</td>
</tr>
<tr>
<td>READING</td>
<td>7</td>
<td>Hussein, Mamie</td>
</tr>
<tr>
<td>READING</td>
<td>5</td>
<td>Cameron, Katrina</td>
</tr>
<tr>
<td><strong>Borrower Type B</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>READING</td>
<td>1</td>
<td>Conroy, Lee</td>
</tr>
<tr>
<td>READING</td>
<td>1</td>
<td>Hb,</td>
</tr>
<tr>
<td><strong>Borrower Type C</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>READING</td>
<td>3</td>
<td>Hurt, John</td>
</tr>
<tr>
<td>READING</td>
<td>3</td>
<td>Heine, Alison</td>
</tr>
<tr>
<td>READING</td>
<td>3</td>
<td>Patchett, Sarah</td>
</tr>
</tbody>
</table>
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

![Edit Report Window](image)

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)
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

<table>
<thead>
<tr>
<th>Budget Group Level 3</th>
<th>Budget Group Level 2</th>
<th>Budget Account</th>
<th>Budget Actual Amount</th>
<th>Budget Commit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBK</td>
<td>BV</td>
<td>10010</td>
<td>$32.81</td>
<td>$19.01</td>
</tr>
<tr>
<td>BBK</td>
<td>BV</td>
<td>10020</td>
<td>$32.12</td>
<td>$60.45</td>
</tr>
<tr>
<td>BBK</td>
<td>BV</td>
<td>10040</td>
<td>$0.00</td>
<td>$114.00</td>
</tr>
<tr>
<td>OOF</td>
<td>CE</td>
<td>19220</td>
<td>$0.00</td>
<td>$92.57</td>
</tr>
<tr>
<td><strong>Sub total</strong></td>
<td></td>
<td></td>
<td><strong>$64.90</strong></td>
<td><strong>$263.45</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Group Level 2</th>
<th>Budget Account</th>
<th>Budget Actual Amount</th>
<th>Budget Commit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBK</td>
<td>BV</td>
<td>40000</td>
<td>$0.00</td>
</tr>
<tr>
<td>BBK</td>
<td>BV</td>
<td>40050</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Sub total</strong></td>
<td></td>
<td></td>
<td><strong>$0.00</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$64.90</strong></td>
</tr>
</tbody>
</table>

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
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 Calendar 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

<table>
<thead>
<tr>
<th>Invoice No.</th>
<th>Invoice Date</th>
<th>Invoice Title</th>
<th>Invoice Account</th>
<th>Invoice Unit Cost Printed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1195</td>
<td>12/05/2015</td>
<td>The Chronicles of Narnia - The Lion, the Witch and the Wardrobe (Full Screen Edition) (2005)</td>
<td>48200</td>
<td>$5800</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td>1196</td>
<td>12/05/2015</td>
<td>Charging hearts - making good decisions about relationships and separating / JH Burett</td>
<td>10000</td>
<td>$3888</td>
</tr>
<tr>
<td></td>
<td>12/05/2015</td>
<td>Come Away with Me (sound recording) / Norma Jones</td>
<td>18210</td>
<td>$2700</td>
</tr>
<tr>
<td></td>
<td>12/05/2015</td>
<td>Dark in the East / Avan Kostetz</td>
<td>18010</td>
<td>$2505</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Subtotal</td>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$14353</td>
<td></td>
</tr>
</tbody>
</table>

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
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.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Order Details</th>
<th>Order Status</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>518</td>
<td>Nanner Syna Replacement Title</td>
<td>ORDERED</td>
<td>$20.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sub-total</td>
<td>$20.00</td>
</tr>
<tr>
<td>529</td>
<td>Blank 20 page</td>
<td>PIV/VICED</td>
<td>$10.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sub-total</td>
<td>$10.00</td>
</tr>
<tr>
<td>530</td>
<td>The Chronicles of Narnia 2 (The)</td>
<td>PIV/VICED</td>
<td>$50.00</td>
</tr>
<tr>
<td>521</td>
<td>Harry Potter and the Deathly Hallows (Book 7)</td>
<td>ORDERED</td>
<td>$30.00</td>
</tr>
<tr>
<td>532</td>
<td>All The World's A Stage</td>
<td>ORDERED</td>
<td>$100.00</td>
</tr>
<tr>
<td>536</td>
<td>Aprendia</td>
<td>PENDING</td>
<td>$0.00</td>
</tr>
<tr>
<td>527</td>
<td>Blandwek</td>
<td>PIV/VICED</td>
<td>$100.00</td>
</tr>
<tr>
<td>539</td>
<td>Best</td>
<td>PIV/VICED</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sub-total</td>
<td>$300.00</td>
</tr>
</tbody>
</table>

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 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
11. Show Sub totals: leave this unticked.
12. Show total: 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 **Filter** Column. **Note** that the Drop-down list includes the Tag Number as well as the Description together in the display.

   ![Filter Column](image)

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).

   ![Date Filter](image)

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.

   ![Preview](image)

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

![Report Designer Window](image)

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**

![Report Details](image)

#### 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

![Catalogue Saved Query Results](image)

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

<table>
<thead>
<tr>
<th>Catalogue Ref Number: 95668</th>
<th>082</th>
<th>791.43R2</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td><em>The Lord of the Rings: The Fellowship of the Ring</em> (video recording) / New Line Cinema presents a WingNut Films production; produced by Barrie M. Osborne... [et al.]; screenplay by Fran Walsh... [et al.]; director, Peter Jackson.</td>
<td></td>
</tr>
<tr>
<td>550</td>
<td><em>The Lord of the Rings: The Fellowship of the Ring,</em> directed by Peter Jackson, screenplay by Fran Walsh, Philippa Boyens, Stephen Stockman. Peter Jackson, producers, Barrie M. Osborne, Fran Walsh. 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</td>
<td></td>
</tr>
<tr>
<td>660</td>
<td><em>Films</em></td>
<td></td>
</tr>
<tr>
<td>660</td>
<td><em>Baggins, Frodo (Fictional character)</em></td>
<td></td>
</tr>
<tr>
<td>660</td>
<td><em>Middle Earth (Imaginary place)</em></td>
<td></td>
</tr>
</tbody>
</table>

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 Fields Column
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

<table>
<thead>
<tr>
<th>Catalogue Ref Number: 95996</th>
</tr>
</thead>
<tbody>
<tr>
<td>245 The lord of the rings, The fellowship of the ring (Kubrick) / New Line Cinema presents a WingNut Films production; producers, Barrie M. Osborne; [et al.]; screenplay: Fran Walsh, [et al.]; director, Peter Jackson.</td>
</tr>
<tr>
<td>520 An elderly hobbit named 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 task across Middle-earth.</td>
</tr>
<tr>
<td>650 Baggins, Frodo (Fictional character)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Catalogue Ref Number: 95996</th>
</tr>
</thead>
<tbody>
<tr>
<td>342 The lord of the rings, The two towers (Extended Edition) / New Line Cinema presents a WingNut Films production, directed by Peter Jackson; screenplay by Fran Walsh, Philippa Boyens, Stephen Skiller, Peter Jackson, [et al.]; producers, Barrie M. Osborne, Fran</td>
</tr>
<tr>
<td>520 The Fellowship has broken, but the quest to destroy the One Ring continues. Frodo and Sam must trust their lives to Gollum if they are to find their way to Mordor. As Saruman's army approaches, the surviving members of the Fellowship...</td>
</tr>
</tbody>
</table>

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
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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Borrower Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abraham, Sabrina</td>
<td><a href="mailto:sabrina.johnston@librarytown.net">sabrina.johnston@librarytown.net</a></td>
</tr>
<tr>
<td>Adams, Cameron</td>
<td><a href="mailto:cameron.hend@librarytown.net">cameron.hend@librarytown.net</a></td>
</tr>
<tr>
<td>Adams, Shaela</td>
<td><a href="mailto:shaela.adams@librarytown.net">shaela.adams@librarytown.net</a></td>
</tr>
<tr>
<td>Adams, Taylah</td>
<td><a href="mailto:taylah.adams@librarytown.net">taylah.adams@librarytown.net</a></td>
</tr>
<tr>
<td>Addison-Edgar, Keyshiaa</td>
<td><a href="mailto:keyshiaa.ae@librarytown.net">keyshiaa.ae@librarytown.net</a></td>
</tr>
<tr>
<td>Adey, Joshua</td>
<td><a href="mailto:joshua.adey@librarytown.net">joshua.adey@librarytown.net</a></td>
</tr>
</tbody>
</table>
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

**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

![Report Designer](image)

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**

![Display Fields](image)

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

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

```
<table>
<thead>
<tr>
<th>Group detail</th>
<th>Borrower Full Name</th>
<th>Borrower Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fabrice Eby</td>
<td>41067</td>
</tr>
<tr>
<td>1</td>
<td>Brayden Cavill</td>
<td>ADEYBBR</td>
</tr>
<tr>
<td>9</td>
<td>Huang</td>
<td>E002</td>
</tr>
<tr>
<td>2</td>
<td>Simon Wilson</td>
<td>E033</td>
</tr>
<tr>
<td>1</td>
<td>AF Reeves</td>
<td>E040</td>
</tr>
<tr>
<td>1</td>
<td>Greg Brown</td>
<td>E044</td>
</tr>
<tr>
<td>3</td>
<td>Alexander Schrock</td>
<td>E051</td>
</tr>
<tr>
<td>1</td>
<td>Leanne Harris</td>
<td>E054</td>
</tr>
<tr>
<td>6</td>
<td>Osama Fenton</td>
<td>E0791234678</td>
</tr>
<tr>
<td>1</td>
<td>Gail Kirk</td>
<td>E081</td>
</tr>
<tr>
<td>1</td>
<td>Melissa Frost</td>
<td>E082</td>
</tr>
<tr>
<td>3</td>
<td>Jerome Halwood</td>
<td>E004</td>
</tr>
<tr>
<td>1</td>
<td>Kirsty Weir</td>
<td>E051</td>
</tr>
<tr>
<td>2</td>
<td>Robyn Miller</td>
<td>E052</td>
</tr>
<tr>
<td>1</td>
<td>Nickola Smith</td>
<td>E088</td>
</tr>
<tr>
<td>1</td>
<td>Hannah Rowcroft</td>
<td>E0031</td>
</tr>
<tr>
<td>1</td>
<td>Marne Hussein</td>
<td>E084</td>
</tr>
<tr>
<td>7</td>
<td>John Hunt</td>
<td>E0909</td>
</tr>
<tr>
<td></td>
<td>Megan Patchett</td>
<td>KENSHEOLMEGAN</td>
</tr>
</tbody>
</table>

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.

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

![Order by](image)

**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

![Display fields](image)

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

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

![Report Designer](image)

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
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 this 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

![Display Fields](image)

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

<table>
<thead>
<tr>
<th>Periodical Subs Supplier</th>
<th>Periodical Main Title</th>
<th>Periodical Subs Start Date</th>
<th>Periodical Subs End Date</th>
<th>Periodical Subs Supplier Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>BT</td>
<td>Centre for Strategic Education: Seminar Series [magazine]</td>
<td>10/06/2016</td>
<td></td>
<td>350.00</td>
</tr>
<tr>
<td>DYM</td>
<td>Better homes and gardens.</td>
<td>01/06/2016</td>
<td></td>
<td>144.00</td>
</tr>
<tr>
<td>DYM</td>
<td>Gardening Australia magazine</td>
<td>05/10/2010</td>
<td></td>
<td>48.00</td>
</tr>
<tr>
<td>JABEN</td>
<td>Waves.</td>
<td>01/11/2010</td>
<td></td>
<td>144.00</td>
</tr>
<tr>
<td>MARS</td>
<td>Great walks</td>
<td>20/11/2015</td>
<td></td>
<td>150.00</td>
</tr>
<tr>
<td>WALS</td>
<td>Wheels</td>
<td>01/11/2015</td>
<td></td>
<td>144.00</td>
</tr>
</tbody>
</table>

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):
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 Main Title | Periodical Copy Title | Periodical Copy Barcode | Periodical Date Recevied | Periodical Date Recd | Periodical Date Recd
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Better homes and gardens</td>
<td>June 2015</td>
<td>STOCK204044104B</td>
<td>04/05/2015</td>
<td>$ 6.00</td>
<td></td>
</tr>
<tr>
<td>May 2015</td>
<td>STOCK2040404172B</td>
<td>04/05/2015</td>
<td>$ 6.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gardening Australia magazine</td>
<td>Sep 2015</td>
<td>STOCK2040441217B</td>
<td>05/10/2015</td>
<td>$ 4.00</td>
<td></td>
</tr>
<tr>
<td>Aug 2015</td>
<td>STOCK2040404120B</td>
<td>05/10/2015</td>
<td>$ 4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul 2015</td>
<td>STOCK2040404115B</td>
<td>05/10/2015</td>
<td>$ 4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great walks</td>
<td>Vol. 15 No. 5, Sep-Oct 2015</td>
<td>STOCK204040832B</td>
<td>28/08/2015</td>
<td>$ 12.50</td>
<td></td>
</tr>
<tr>
<td>Vol. 15 No. 4, Jul-Aug 2015</td>
<td>STOCK204040844B</td>
<td>24/08/2015</td>
<td>$ 12.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vol. 15 No. 3, May-Jun 2015</td>
<td>STOCK204040846B</td>
<td>24/08/2015</td>
<td>$ 12.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vol. 15 No. 2, Mar-Apr 2015</td>
<td>STOCK204040832B</td>
<td>24/08/2015</td>
<td>$ 12.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vol. 15 No. 1, Jan-Feb 2015</td>
<td>STOCK204040844B</td>
<td>24/08/2015</td>
<td>$ 12.50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Better homes and gardens</td>
<td>Item Perm Location: CHELSEA</td>
<td>M</td>
<td>1</td>
<td>144.00</td>
<td>01/05/2016</td>
<td>30/04/2017</td>
<td>ISSUE</td>
</tr>
<tr>
<td>Great walking</td>
<td>Item Perm Location: CHELSEA</td>
<td>3</td>
<td>150.00</td>
<td>01/01/2016</td>
<td>31/12/2016</td>
<td>ISSUE</td>
<td></td>
</tr>
<tr>
<td>Waves</td>
<td>Item Perm Location: CHELSEA</td>
<td>O</td>
<td>2</td>
<td>144.00</td>
<td>01/01/2016</td>
<td>31/12/2016</td>
<td>ISSUE</td>
</tr>
<tr>
<td></td>
<td>Item Perm Location: HASTINGS</td>
<td>O</td>
<td>3</td>
<td>144.00</td>
<td>01/01/2016</td>
<td>31/12/2016</td>
<td>ISSUE</td>
</tr>
</tbody>
</table>
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

**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:

<table>
<thead>
<tr>
<th>No. of Issues</th>
<th>Periodical Main Title: Australian Geographic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Item Perm Location: CHELSEA</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Periodical Main Title: The design and decoration</td>
</tr>
<tr>
<td></td>
<td>Item Perm Location: CHELSEA</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Periodical Main Title: Better homes and gardens</td>
</tr>
<tr>
<td></td>
<td>Item Perm Location: CHELSEA</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Periodical Main Title: Great walks</td>
</tr>
<tr>
<td></td>
<td>Item Perm Location: CHELSEA</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Item Perm Location: HASTINGS</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Sub total</td>
</tr>
<tr>
<td></td>
<td>6</td>
</tr>
</tbody>
</table>

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.
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

![Image]

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**

![Reservation Date Placed](image)

**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!

<table>
<thead>
<tr>
<th>Borrower Full Name: Given, Surname</th>
<th>Reservation Item Title</th>
<th>Reservation Location</th>
<th>Reservation Date Placed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cavill, Bryden</td>
<td>Dogs can sign, too - a breakthrough method for teaching your dog to communicate to you / Sean Beringer</td>
<td>CHELSEA</td>
<td>19/01/2015</td>
</tr>
<tr>
<td>Fenton, Diana</td>
<td>Ageing Well</td>
<td>CHELSEA</td>
<td>18/06/2014</td>
</tr>
<tr>
<td>Fenton, Diana</td>
<td>Age of enigma - the secret of the sixth ghost</td>
<td>CHELSEA</td>
<td>18/06/2014</td>
</tr>
</tbody>
</table>

Or include a Group of Borrower Full name – Given, Surname... so that the name does not repeat!
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 into 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 Statistics Location to the Filter column

10. Select Equal

11. Select the required Location – for example Chelsea

**Preview**

Select Preview to view the Report
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

   ![Chart options]

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

![Graph showing data fields and group fields]

**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
Another Example

Issues for 2014 grouped by Stats codes
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 Entity 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
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

![Display Fields](image)

**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 Filter By 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

<table>
<thead>
<tr>
<th>Item Title</th>
<th>Stock History Type</th>
<th>Group detail count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower Type: A</td>
<td>ISSUE</td>
<td>21</td>
</tr>
<tr>
<td>Item Catalogue Reference: World Steam Locomotives</td>
<td>ISSUE</td>
<td>8</td>
</tr>
<tr>
<td>Item Catalogue Reference: 35066 Chemistry one: materials, chemistry in everyday life.</td>
<td>ISSUE</td>
<td>5</td>
</tr>
<tr>
<td>Item Catalogue Reference: 26634 Belle Sep 1997</td>
<td>ISSUE</td>
<td>4</td>
</tr>
<tr>
<td>Item Catalogue Reference: 25055 The Druid of Shannara / Terry Brooks</td>
<td>ISSUE</td>
<td>4</td>
</tr>
</tbody>
</table>

**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
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
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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Account</td>
<td>Account code which is used for the expenditure within a budget</td>
<td>AF</td>
<td>ACH_ACCOUNT_HDR</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>unless specified</td>
</tr>
<tr>
<td>Budget Account Details</td>
<td>Account description rather than the code</td>
<td></td>
<td>ACH_DESC</td>
</tr>
<tr>
<td>Budget Actual Amount</td>
<td>Actual Amount Spent within the Budget and on longer committed</td>
<td>2000.00</td>
<td>ACH_ACTUAL</td>
</tr>
<tr>
<td>Budget Commit Amount</td>
<td>Actual Amount Ordered and Committed within the Budget</td>
<td>1000.00</td>
<td>ACH_COMMIT</td>
</tr>
<tr>
<td>Budget Financial Year</td>
<td>Current Financial Year – generally the one to use as is available as a Drop-down and references the Financial Years in use</td>
<td>2014</td>
<td>ACH_YEAR</td>
</tr>
<tr>
<td>Budget Group Level 1</td>
<td>GL Code 1 from the Budget hierarchy</td>
<td>LIB</td>
<td>ACH_GROUP1</td>
</tr>
<tr>
<td>Budget Group Level 1 Details</td>
<td>GL Code 1 Description from the Budget hierarchy</td>
<td>Library</td>
<td>ACCNO_GROUP.ACCNO_CODE_DESC</td>
</tr>
<tr>
<td>Budget Group Level 2</td>
<td>GL Code 2 from the Budget hierarchy</td>
<td>BK</td>
<td>ACH_GROUP2</td>
</tr>
<tr>
<td>Budget Group Level 2 Details</td>
<td>GL Code 2 Description from the Budget hierarchy</td>
<td>Books</td>
<td>ACCNO_GROUP.ACCNO_CODE_DESC</td>
</tr>
<tr>
<td>Budget Group Level 3</td>
<td>GL Code 3 from the Budget hierarchy</td>
<td>AF</td>
<td>ACH_GROUP3</td>
</tr>
<tr>
<td>Budget Group Level 3 Details</td>
<td>GL Code 3 Description from the Budget hierarchy</td>
<td>Adult Fiction</td>
<td>ACCNO_GROUP.ACCNO_CODE_DESC</td>
</tr>
<tr>
<td>Budget Group Level 4</td>
<td>GL Code 4 from the Budget hierarchy</td>
<td>NOV</td>
<td>ACH_GROUP4</td>
</tr>
<tr>
<td>Budget Group Level 4 Details</td>
<td>GL Code 4 Description from the Budget hierarchy</td>
<td>Novels</td>
<td>ACCNO_GROUP.ACCNO_CODE_DESC</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------</td>
<td>--------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Budget Library Group</td>
<td>Library Group for current Budget</td>
<td>PRIM</td>
<td>ACH.LIB.GROUP</td>
</tr>
<tr>
<td>Budget Total Amount</td>
<td>Budgeted Amount allowed to spend within the Budget</td>
<td>5000.00</td>
<td>ACH.BUDGET</td>
</tr>
</tbody>
</table>
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

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

<table>
<thead>
<tr>
<th>Invoice Line Tax Rate</th>
<th>Rate calculated for the Tax code chosen</th>
<th>1.1%</th>
<th>AC_COMPONENT.AC_TAX_RATE</th>
</tr>
</thead>
</table>

## Invoice Local Cost
Invoice Total before Tax – Forex amount minus the tax component  

<table>
<thead>
<tr>
<th>Invoice Local Cost</th>
<th>Invoice Total before Tax – Forex amount minus the tax component</th>
<th>60.00</th>
<th>AH_TOTAL</th>
</tr>
</thead>
</table>

## Invoice No
Invoice Number allocated to the Invoice  

<table>
<thead>
<tr>
<th>Invoice No</th>
<th>Invoice Number allocated to the Invoice</th>
<th>008899</th>
<th>AH_INVOICE_NO</th>
</tr>
</thead>
</table>

## Invoice Notes
Invoice Note  

<table>
<thead>
<tr>
<th>Invoice Notes</th>
<th>Invoice Note</th>
<th>Cash purchase at Conference</th>
<th>AH_NOTES</th>
</tr>
</thead>
</table>

## Invoice Order Line No
Order Line No for processing  

<table>
<thead>
<tr>
<th>Invoice Order Line No</th>
<th>Order Line No for processing</th>
<th>2</th>
<th>AC_COMPONENT.AC_ORDER_LNO</th>
</tr>
</thead>
</table>

## Invoice Order No
Order No included in the Order Invoice  

<table>
<thead>
<tr>
<th>Invoice Order No</th>
<th>Order No included in the Order Invoice</th>
<th>516</th>
<th>AC_COMPONENT.AC_ORDER_NO</th>
</tr>
</thead>
</table>

## Invoice Report Date
Date of an Invoice report where the Update mode was set to Y  

<table>
<thead>
<tr>
<th>Invoice Report Date</th>
<th>Date of an Invoice report where the Update mode was set to Y</th>
<th>23/04/2015</th>
<th>AH_REPORT_DATE</th>
</tr>
</thead>
</table>

## Invoice Status
Status of the Invoice – either Pending or Invoiced  

<table>
<thead>
<tr>
<th>Invoice Status</th>
<th>Status of the Invoice – either Pending or Invoiced</th>
<th>INVOICED</th>
<th>AH_STATUS</th>
</tr>
</thead>
</table>

## Invoice Supplier
Code of the Supplier for the Invoice  

<table>
<thead>
<tr>
<th>Invoice Supplier</th>
<th>Code of the Supplier for the Invoice</th>
<th>DYM</th>
<th>AH_SUPP_NO</th>
</tr>
</thead>
</table>

## Invoice Supplier Details
Description of the Supplier of the Invoice  

<table>
<thead>
<tr>
<th>Invoice Supplier Details</th>
<th>Description of the Supplier of the Invoice</th>
<th>Dymocks</th>
<th>PER_SUPPLIER.PS_COMPANY</th>
</tr>
</thead>
</table>

## Invoice Title
Invoice Line 1, usually the Title  

<table>
<thead>
<tr>
<th>Invoice Title</th>
<th>Invoice Line 1, usually the Title</th>
<th>Easy Reader Book 2</th>
<th>AC_COMPONENT.AC_LINE1</th>
</tr>
</thead>
</table>

## Invoice Total Tax excl
Invoice Total excluding Tax  

<table>
<thead>
<tr>
<th>Invoice Total Tax excl</th>
<th>Invoice Total excluding Tax</th>
<th>66.00</th>
<th>AH_COST</th>
</tr>
</thead>
</table>

## Invoice Unit Cost exc Tax
Cost excluding the Tax component of the Invoice Line  

<table>
<thead>
<tr>
<th>Invoice Unit Cost exc Tax</th>
<th>Cost excluding the Tax component of the Invoice Line</th>
<th>40.00</th>
<th>ACCOUNT_COMPONENT.AC_COST</th>
</tr>
</thead>
</table>

## Invoice Unit Cost inc Tax
Cost including the Tax component of the Invoice Line  

<table>
<thead>
<tr>
<th>Invoice Unit Cost inc Tax</th>
<th>Cost including the Tax component of the Invoice Line</th>
<th>44.00</th>
<th>ACCOUNT_COMPONENT.AC_TOTAL</th>
</tr>
</thead>
</table>

## Invoice User Created
User who created the Invoice. Depends on login to the system  

<table>
<thead>
<tr>
<th>Invoice User Created</th>
<th>User who created the Invoice. Depends on login to the system</th>
<th>STAFF</th>
<th>AH_OPER</th>
</tr>
</thead>
</table>

## Invoiced Qty
No of items within the Invoice Line that have been invoiced  

<table>
<thead>
<tr>
<th>Invoiced Qty</th>
<th>No of items within the Invoice Line that have been invoiced</th>
<th>1</th>
<th>ACCOUNT_COMPONENT.AC_QTY_INVOICED</th>
</tr>
</thead>
</table>

### 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

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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name – from AUTHORITY unless shown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authority Created/Modified by</td>
<td>User who created or modified the Authority last</td>
<td>STAFF</td>
<td>AUTH_OPER</td>
</tr>
<tr>
<td>Authority Date Modified</td>
<td>Authority Date created or Date modified. Only one date Field in the Authority</td>
<td>22/06/2015</td>
<td>AUTH_DATETIME</td>
</tr>
<tr>
<td>Authority Details</td>
<td>Data contained within the Marc Tag</td>
<td>Animals - Fiction</td>
<td>AUTH_MARC</td>
</tr>
<tr>
<td>Authority File Date</td>
<td>File Date created or Date modified.</td>
<td>22/06/2015</td>
<td>FILE_DATE</td>
</tr>
<tr>
<td>Authority File Description</td>
<td>Description used to Name the File</td>
<td>SCIS 22/06</td>
<td>FILE_DESC</td>
</tr>
<tr>
<td>Authority File Entries</td>
<td>The number of entries within the File</td>
<td>121</td>
<td>FILE_QTY</td>
</tr>
<tr>
<td>Authority File Number</td>
<td>The unique File Number. This is recommended to pinpoint a particular File</td>
<td>3554</td>
<td>FILE_NUMBER</td>
</tr>
<tr>
<td>Authority File Operator</td>
<td>File Operator (User name)</td>
<td>STAFF</td>
<td>FILE_OPER</td>
</tr>
<tr>
<td>Authority File Operator Access</td>
<td>Whether other Users are allowed to access the File Y/N</td>
<td>Y</td>
<td>FILE_OPER_ACCESS</td>
</tr>
<tr>
<td>Authority Has See Also?</td>
<td>The Authority has See Also references Y/N</td>
<td>Y</td>
<td>AUTH_HAS_SA</td>
</tr>
<tr>
<td>Authority Lib Group</td>
<td>Library Group Code associated with the Marc Tag</td>
<td>LIBRARY</td>
<td>AUTH_LIB_GROUP</td>
</tr>
<tr>
<td>Authority Note Text</td>
<td>Authority Note that guides the Cataloguer on to when to use the Authority</td>
<td>“Use for descriptive works on houses”</td>
<td>AUTH_NOTE.AUTH_NOTE_DATA</td>
</tr>
<tr>
<td>Authority Note?</td>
<td>Whether the Tag has an Authority Note Y/N</td>
<td>Y</td>
<td>AUTH_NOTE</td>
</tr>
<tr>
<td>Authority Search Key</td>
<td>Search term as held in the database table</td>
<td>MOLLYS REVENGE</td>
<td>AUTH_KEY</td>
</tr>
<tr>
<td>Authority Tag Description</td>
<td>Authority Description of the Authority Tag</td>
<td>Subject – Topical Term</td>
<td>TAG_TAGDEF.TT_TAG_DESC</td>
</tr>
<tr>
<td>Authority Tag Indicator 1</td>
<td>First Indicator for the Tag</td>
<td>4</td>
<td>AUTH_IND1</td>
</tr>
<tr>
<td>Authority Tag Indicator 2</td>
<td>Second indicator for the Tag</td>
<td>1</td>
<td>AUTH_IND2</td>
</tr>
<tr>
<td>Authority Tag No</td>
<td>Authority Tag Number</td>
<td>650</td>
<td>AUTH_TAG_NO</td>
</tr>
</tbody>
</table>

---

**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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name - from CATALOGUE unless shown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Author as shown in the 1st line of the Catalogue Display – usually Author</td>
<td>Winton, Tim, 1960-</td>
<td>CAT_STR1</td>
</tr>
<tr>
<td>Author Key</td>
<td>Author as stored by the Database, without punctuation, stopwords and all capitalized</td>
<td>WINTON TIM</td>
<td>CAT_KEY1</td>
</tr>
<tr>
<td>Call No</td>
<td>Call No as shown in the Catalogue</td>
<td>B/WIN</td>
<td>CAT_STR4</td>
</tr>
<tr>
<td>Call No Key</td>
<td>Call No as stored by the Database without punctuation and all capitalized</td>
<td>B WIN</td>
<td>CAT_KEY4</td>
</tr>
<tr>
<td>Catalogue Created By</td>
<td>Amlib Operator who created the Catalogue record</td>
<td>SSTAFF</td>
<td>CAT_CREATE_OPERATOR</td>
</tr>
<tr>
<td>Catalogue Date Created</td>
<td>Date the Catalogue record was created</td>
<td>19/01/2015</td>
<td>CAT_CREATE_DATETIME</td>
</tr>
<tr>
<td>Catalogue File Date</td>
<td>File Date created or Date modified.</td>
<td>22/06/2015</td>
<td>FILE_DATE</td>
</tr>
<tr>
<td>Catalogue File Description</td>
<td>Description used to Name the File</td>
<td>SCIS 22/06</td>
<td>FILE_DESC</td>
</tr>
<tr>
<td>Catalogue File Entries</td>
<td>The number of entries within the File</td>
<td>121</td>
<td>FILE_QTY</td>
</tr>
<tr>
<td>Catalogue File Number</td>
<td>The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)</td>
<td>3554</td>
<td>FILE_NUMBER</td>
</tr>
<tr>
<td>Catalogue File Operator</td>
<td>File Operator (User name)</td>
<td>STAFF</td>
<td>FILE_OPER</td>
</tr>
<tr>
<td>Catalogue File Operator Access</td>
<td>Whether other Users are allowed to access the File Y/N</td>
<td>Y</td>
<td>FILE_OPER_ACCESS</td>
</tr>
<tr>
<td>Catalogue Indicator 1</td>
<td>Indicator 1 as shown within the Catalogue Data Tag</td>
<td>4</td>
<td>BIBVIEW.INDICATOR1</td>
</tr>
<tr>
<td>Catalogue Indicator 2</td>
<td>Indicator 2 as shown within the Catalogue Data Tag</td>
<td>5</td>
<td>BIBVIEW.INDICATOR1</td>
</tr>
<tr>
<td>Catalogue Lib Group</td>
<td>Lib Group for the Catalogue record</td>
<td>LIB</td>
<td>CAT_LIB_GROUP</td>
</tr>
<tr>
<td>Catalogue Modified By</td>
<td>Catalogue last modified by this Amlib User</td>
<td>JSTAFF</td>
<td>CAT_OPERATOR</td>
</tr>
<tr>
<td>Catalogue Ref Number</td>
<td>Catalogue Reference ID</td>
<td>67819</td>
<td>CAT_NO</td>
</tr>
<tr>
<td>Catalogue Tag Data</td>
<td>Data associated with that Marc Tag</td>
<td>978-1-567-24526-8</td>
<td>BIBVIEW.TAG_DATA</td>
</tr>
<tr>
<td>Catalogue Tag Description</td>
<td>Description of the Catalogue Tag</td>
<td>Subject – Topical Term</td>
<td>TT.TAG_DESCRIPTION</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------------------------</td>
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</tr>
<tr>
<td>Catalogue Tag Number</td>
<td>Catalogue Tag Number</td>
<td>020</td>
<td>BIBVIEW.TAGNO</td>
</tr>
<tr>
<td>Catalogue Tag Seq</td>
<td>Catalogue Tag Sequence</td>
<td>24500</td>
<td>BIBVIEW.CATSEQUENCE</td>
</tr>
<tr>
<td>Catalogue Updated</td>
<td>Date/Time that the Catalogue was last updated. Default is to show the Date but Time can be formatted to display</td>
<td>29/09/2010</td>
<td>CAT_DATETIME</td>
</tr>
<tr>
<td>Publisher</td>
<td>Publisher as shown in the 3rd line of the Catalogue Display – usually Publisher</td>
<td>London, Puffin : 2015</td>
<td>CAT_STR3</td>
</tr>
<tr>
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<td>Publisher as shown as stored in the Database, without punctuation and capitalized</td>
<td>London Puffin 2016</td>
<td>CAT_KEY3</td>
</tr>
<tr>
<td>Title</td>
<td>Title as shown in the 2nd line of the Catalogue Display – usually Title</td>
<td>Molly’s revenge</td>
<td>CAT_STR2</td>
</tr>
<tr>
<td>Title Key</td>
<td>Title as shown as stored in the Database, without punctuation, stopwords and capitalized</td>
<td>MOLLYS REVENGE</td>
<td>CAT_KEY2</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name - from BORROWER unless shown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower Address1 Full</td>
<td>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.</td>
<td>0345677654 Unit 3, 15 Haddin Way, Bedford, WA, 6115</td>
<td>BOR_ADDR1_TXT</td>
</tr>
<tr>
<td>Borrower Address1 Line1</td>
<td>Borrower Address as shown in the First Address Field of the Borrower – first line.</td>
<td>Unit 4</td>
<td>BORADDR.BA_ADDR1</td>
</tr>
<tr>
<td>Borrower Address1 Line2</td>
<td>Borrower Address as shown in the First Address Field of the Borrower – second line</td>
<td>Tiger Lane</td>
<td>BORADDR.BA_ADDR2</td>
</tr>
<tr>
<td>Borrower Address1 Line3</td>
<td>Borrower Address as shown in the First Address Field of the Borrower – third line</td>
<td>Chelsea</td>
<td>BORADDR.BA_ADDR3</td>
</tr>
<tr>
<td>Borrower Address1 Line4</td>
<td>Borrower Address as shown in the First Address Field of the Borrower – fourth line</td>
<td>Australia</td>
<td>BORADDR.BA_ADDR4</td>
</tr>
<tr>
<td>Borrower Address1 Postcode</td>
<td>Postcode as shown in the Postcode Field of the Borrower Address 1</td>
<td>3145</td>
<td>BORADDR.BA_ADDR1_POSTCODE</td>
</tr>
<tr>
<td>Borrower Address1 Telephone</td>
<td>Telephone as shown in the Telephone Field of the Borrower Address 1</td>
<td>0345677654</td>
<td>BORADDR.BA_TELEPHONE</td>
</tr>
<tr>
<td>Borrower Address2 Full</td>
<td>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.</td>
<td>0345677654 Unit 1, 15 Haddin Way, Bedford, WA, 6115</td>
<td>BOR_ADDR2_TXT</td>
</tr>
<tr>
<td>Borrower Address2, Line 1</td>
<td>Address 2, Line 1</td>
<td>13 Station St</td>
<td>BORADDR2.BA_ADDR1</td>
</tr>
<tr>
<td>Borrower Address2, Line 2</td>
<td>Address 2, Line 2</td>
<td>Bedford</td>
<td>BORADDR2.BA_ADDR2</td>
</tr>
<tr>
<td>Borrower Address2, Line 3</td>
<td>Address 2, Line 3</td>
<td>WA 6115</td>
<td>BORADDR2.BA_ADDR3</td>
</tr>
<tr>
<td>Borrower Address2, Line 4</td>
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<td>Australia</td>
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</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Value</td>
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</tr>
<tr>
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<td>------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Borrower Address2 Postcode</td>
<td>Postcode as shown in the Postcode Field of the Borrower Address 2</td>
<td>BORADDR2.BA_PCODE</td>
<td></td>
</tr>
<tr>
<td>Borrower Address2 Telephone</td>
<td>Telephone as shown in the Telephone Field of the Borrower Address 2</td>
<td>BORADDR2.BA_TELEPHONE</td>
<td></td>
</tr>
<tr>
<td>Borrower Address3 Full</td>
<td>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.</td>
<td>0345677654 Unit 1, 15 Haddin Way, Bedford, WA, 6115 BOR_ADDR3_TXT</td>
<td></td>
</tr>
<tr>
<td>Borrower Address3, Line 1</td>
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<td>13 Station St BORADDR3.BA_ADDR1</td>
<td></td>
</tr>
<tr>
<td>Borrower Address3, Line 2</td>
<td>Address 3, Line 2</td>
<td>Bedford BORADDR3.BA_ADDR2</td>
<td></td>
</tr>
<tr>
<td>Borrower Address3, Line 3</td>
<td>Address 3, Line 3</td>
<td>WA 6115 BORADDR3.BA_ADDR3</td>
<td></td>
</tr>
<tr>
<td>Borrower Address3, Line 4</td>
<td>Address 3, Line 4</td>
<td>Australia BORADDR3.BA_ADDR4</td>
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</tr>
<tr>
<td>Borrower Address3 Postcode</td>
<td>Postcode as shown in the Postcode Field of the Borrower Address 3</td>
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</tr>
<tr>
<td>Borrower Address3 Telephone</td>
<td>Telephone as shown in the Telephone Field of the Borrower Address 3</td>
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<tr>
<td>Borrower Area Code</td>
<td>Borrower Area code</td>
<td>NW BORADDR.BA_AREA_CD</td>
<td></td>
</tr>
<tr>
<td>Borrower Area Code Details</td>
<td>Borrower Area Description of Code</td>
<td>North West AREA.AREA_NAME</td>
<td></td>
</tr>
<tr>
<td>Borrower Balance</td>
<td>Balance of money owing</td>
<td>24.00 BOR_OWING</td>
<td></td>
</tr>
<tr>
<td>Borrower Barcode</td>
<td>Barcode or ID of Borrower</td>
<td>B24256 BOR_BAR_NO</td>
<td></td>
</tr>
<tr>
<td>Borrower Class</td>
<td>Borrower Class Code</td>
<td>RM9 BOR_CLASS</td>
<td></td>
</tr>
<tr>
<td>Borrower Class Details</td>
<td>Class Code description</td>
<td>Room 9 – Mr Evans BORCLASSES.BC_NAME</td>
<td></td>
</tr>
<tr>
<td>Borrower Count</td>
<td>Count of Borrower depending on the Filter used</td>
<td>25 #Function#</td>
<td></td>
</tr>
<tr>
<td>Borrower Date of Birth</td>
<td>Borrower Date of Birth (Format can be altered for the report)</td>
<td>21/03/1981 BOR_DOB</td>
<td></td>
</tr>
<tr>
<td>Borrower Email</td>
<td>Borrower Email address</td>
<td><a href="mailto:Steven.evans@iinet.net.au">Steven.evans@iinet.net.au</a>                           BOR_EMAIL</td>
<td></td>
</tr>
<tr>
<td>Borrower Exclude from Debt Collection</td>
<td>Borrower exclude from Debt Collection setting Y/N</td>
<td>N BOR_DC_EXCLUDE</td>
<td></td>
</tr>
<tr>
<td>Borrower File Date</td>
<td>File Date created or Date modified.</td>
<td>22/06/2015 FILE_SET_NAMES.FILE_DATE</td>
<td></td>
</tr>
<tr>
<td>Borrower File Description</td>
<td>Description used to Name the File</td>
<td>Admin Load 22/06 FILE_SET_NAMES.FILE_DESC</td>
<td></td>
</tr>
<tr>
<td>Borrower File Entries</td>
<td>The number of entries within the File</td>
<td>121 FILE_SET_NAMES.FILE_QTY</td>
<td></td>
</tr>
<tr>
<td>Borrower File Number</td>
<td>The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)</td>
<td>3554</td>
<td>FILE_SET_NAMES.FILE_NUMBER</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------</td>
<td>------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Borrower File Operator</td>
<td>File Operator (User name)</td>
<td>STAFF</td>
<td>FILE_SET_NAMES.FILE_OPER</td>
</tr>
<tr>
<td>Borrower File Operator Access</td>
<td>Whether other Users are allowed to access the File Y/N</td>
<td>Y</td>
<td>FILE_SET_NAMES.FILE_OPER_ACCESS</td>
</tr>
<tr>
<td>Borrower File Date</td>
<td>File Date created or Date modified.</td>
<td>22/06/2015</td>
<td>FILE_SET_NAMES.FILE_DATE</td>
</tr>
<tr>
<td>Borrower Full Name- Given, Surname</td>
<td>Concatenated Borrower Given and Surnames in one string</td>
<td>Tom Strange</td>
<td>#Function#</td>
</tr>
<tr>
<td>Borrower Full Name- Surname, Given</td>
<td>Concatenated Borrower Surname and Given Name</td>
<td>Strange, Tom</td>
<td>#Function#</td>
</tr>
<tr>
<td>Borrower Gender</td>
<td>Borrower Sex/Gender</td>
<td>F</td>
<td>BOR_SEX</td>
</tr>
<tr>
<td>Borrower Given Name</td>
<td>Borrower Given Name</td>
<td>Steven</td>
<td>BOR_GIVEN</td>
</tr>
<tr>
<td>Borrower Group</td>
<td>Borrower Group Code</td>
<td>GOLD</td>
<td>BOR_GROUP</td>
</tr>
<tr>
<td>Borrower Group Details</td>
<td>Description of Borrower Group Code</td>
<td>GOLD FACTION</td>
<td>BORGROUPS.BG_NAME</td>
</tr>
<tr>
<td>Borrower Guardian address</td>
<td>Borrower Guardian address as shown in Address 3</td>
<td>Mr Taylor, 19 The Crescent, Maylands WA 2522.</td>
<td>BOR_ADDR3_TXT</td>
</tr>
<tr>
<td>Borrower Initial</td>
<td>Initial for Middle Name</td>
<td>T</td>
<td>BOR_INIT</td>
</tr>
<tr>
<td>Borrower Joined Date</td>
<td>Date that Borrower joined the Library (format can be altered within the report)</td>
<td>24/05/2013</td>
<td>BOR_START_MSHIP</td>
</tr>
<tr>
<td>Borrower Joined Location</td>
<td>Location Code - where Borrower joined the Library</td>
<td>CHEL</td>
<td>BOR_START_LOCATION</td>
</tr>
<tr>
<td>Borrower Joined Location Details</td>
<td>Location Description of the Code - where Borrower joined the Library</td>
<td>Chelsea</td>
<td>LIB_LOCATIONS31.LL_NAME</td>
</tr>
<tr>
<td>Borrower Last Active</td>
<td>Date that Borrower last entered barcode for Circulation / Visit (Barcode was entered)</td>
<td>21/05/2015</td>
<td>BOR_LASTACTIVE</td>
</tr>
<tr>
<td>Borrower Last Status Update</td>
<td>Status last modified</td>
<td>21/11/2014</td>
<td>BOR_STATUS_DATE</td>
</tr>
<tr>
<td>Borrower Last Updated</td>
<td>Last time the Borrower Details were saved. Default is to show the date but time can be used to format differently</td>
<td>21/11/2014</td>
<td>BOR_DATETIME</td>
</tr>
<tr>
<td>Borrower Lib Group</td>
<td>Library Group for Location</td>
<td>LIB</td>
<td>BOR_LIB_GROUP</td>
</tr>
<tr>
<td>Borrower Loans Count</td>
<td>Borrower Total Loans as shown in the Borrower History</td>
<td>5</td>
<td>BOR_NO_LOANS</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Value</td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------</td>
<td></td>
</tr>
<tr>
<td>Borrower Location</td>
<td>Current Location of Borrower</td>
<td>CHEL</td>
<td></td>
</tr>
<tr>
<td>Borrower Location Details</td>
<td>Description of Current Borrower Location</td>
<td>Chelsea Public Library</td>
<td></td>
</tr>
<tr>
<td>Borrower Memo Date</td>
<td>Memo Date of Borrower’s Memo. Format can be altered within report</td>
<td>22/04/2014</td>
<td></td>
</tr>
<tr>
<td>Borrower Memo Details</td>
<td>Memo Text of Borrower’s Memo</td>
<td>Left umbrella</td>
<td></td>
</tr>
<tr>
<td>Borrower Memo Type</td>
<td>Memo Type for Borrower’s Memo</td>
<td>ADDRESS</td>
<td></td>
</tr>
<tr>
<td>Borrower Memo Type Details</td>
<td>Description for Borrower Memo Type</td>
<td>Change of Address</td>
<td></td>
</tr>
<tr>
<td>Borrower Mobile Number</td>
<td>Mobile Telephone Number of Borrower</td>
<td>0411889933</td>
<td></td>
</tr>
<tr>
<td>Borrower PIN</td>
<td>Personal Identifier Number for Borrower</td>
<td>9999</td>
<td></td>
</tr>
<tr>
<td>Borrower Ref1</td>
<td>Data entered in Reference1 Field of Borrower. Free Text field and label can</td>
<td>Page 264 Registration Book</td>
<td></td>
</tr>
<tr>
<td></td>
<td>be altered through Supervisor, Installation Parameters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borrower Ref2</td>
<td>Data entered in Reference2 of Borrower. Free Text field and label can be</td>
<td>HILTOM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>altered through Supervisor, Installation Parameters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borrower Registration Date</td>
<td>Date set for Borrower Registration</td>
<td>22/09/2017</td>
<td></td>
</tr>
<tr>
<td>Borrower Status</td>
<td>Borrower Status as currently shown within Borrower</td>
<td>OK</td>
<td></td>
</tr>
<tr>
<td>Borrower Suburb Code</td>
<td>Suburb Code</td>
<td>BED</td>
<td></td>
</tr>
<tr>
<td>Borrower Suburb Code Details</td>
<td>Description of Suburb Code</td>
<td>Bedford</td>
<td></td>
</tr>
<tr>
<td>Borrower Surname</td>
<td>Borrower Surname or Family name</td>
<td>SMITH</td>
<td></td>
</tr>
<tr>
<td>Borrower Title</td>
<td>Title if given within Borrower Details</td>
<td>MR</td>
<td></td>
</tr>
<tr>
<td>Borrower Total Renews</td>
<td>Number in total of Renewal as shown in Borrower History</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Borrower Total Reserves</td>
<td>Number in total of Reserves as shown in Borrower History</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>Borrower Total Loans</td>
<td>Number in total of Loans as shown in Borrower History</td>
<td>1919</td>
<td></td>
</tr>
<tr>
<td>Borrower Total Visits</td>
<td>Number in total of Visits (Barcode used within Circulation tasks) as shown</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>in Borrower History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borrower Type</td>
<td>Borrower Type Code</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>Borrower Type Details</td>
<td>Description given to Borrower type Code</td>
<td>Adult</td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Details Count</td>
<td>Include this field in your Display Fields and the report will contain a count of items per field(s) in the Group Fields</td>
<td>22</td>
<td>#Function#</td>
</tr>
</tbody>
</table>

![Diagram of Entities/Data fields and Display fields showing the selection of Group Details Count and the related description text. The text in the diagram reads: Group detail count - from entity: Counter - technical info: # Function # :=Count(). Include this field in your Display Fields and the report will contain a count of items per field(s) in the Group Fields.}
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

![Image of Installation screen](image.png)
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

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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name - from FIN_TRANS unless shown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Amount Owing</td>
<td>Amount owing from the transaction</td>
<td>20.00</td>
<td>#Function#</td>
</tr>
</tbody>
</table>
| Transaction Borrower Name    | Borrower Name as shown in the Transaction        | Smith, Julian | FIN_NAME
<p>| 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                                   |</p>
<table>
<thead>
<tr>
<th>Transaction Invoice Date</th>
<th>Date for the Invoice</th>
<th>13/04/2015</th>
<th>FIN_INV_DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Invoice Number</td>
<td>Invoice Number included in the Transaction</td>
<td>13667</td>
<td>FIN_INV_NO</td>
</tr>
<tr>
<td>Transaction Item Barcode</td>
<td>Associated Stockitem barcode for transaction</td>
<td>I89321</td>
<td>FIN_ITEM</td>
</tr>
<tr>
<td>Transaction Item Title</td>
<td>Associated Stockitem Title for transaction</td>
<td>The high tide</td>
<td>FIN_TITLE</td>
</tr>
<tr>
<td>Transaction Last Modified</td>
<td>Date the Transaction was modified</td>
<td>13/04/2015</td>
<td>FIN_DATE_MOD</td>
</tr>
<tr>
<td>Transaction Location</td>
<td>Location Code at which Transaction occurred</td>
<td>Chelsea</td>
<td>FIN_LOC</td>
</tr>
<tr>
<td>Transaction Location Details</td>
<td>Description of Transaction Location Code</td>
<td>Chelsea Public Library</td>
<td>LIBLOCATIONS4.LLNAME</td>
</tr>
<tr>
<td>Transaction Paid</td>
<td>Paid amount</td>
<td>10.00</td>
<td>FIN_PAID</td>
</tr>
<tr>
<td>Transaction Quantity</td>
<td>Quantity of items/days</td>
<td>30</td>
<td>FIN_QTY</td>
</tr>
<tr>
<td>Transaction Receipt No</td>
<td>Receipt Number of payment</td>
<td>76544</td>
<td>FIN_RECEIPT</td>
</tr>
<tr>
<td>Transaction Type</td>
<td>Transaction Type Code</td>
<td>FINE</td>
<td>FIN_TYPE</td>
</tr>
<tr>
<td>Transaction Type Details</td>
<td>Description of Transaction Type Code</td>
<td>OVERDUE FINE</td>
<td>FIN_TYPES.FIN_DESC</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower History</td>
<td>Comment recorded within History</td>
<td>“980393755  Mindpower : set your sights on success”</td>
<td>BH_COMMENTS</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borrower History Date</td>
<td>Date as displayed in History Table. <strong>Note: Date and time element</strong></td>
<td>6 March 2015 9:00AM</td>
<td>BH_DATE</td>
</tr>
<tr>
<td>Borrower History Title</td>
<td>Item Title</td>
<td>The Gift Horse</td>
<td>STK_TITLE</td>
</tr>
<tr>
<td>Borrower History Type</td>
<td>There are choices of Borrower history types</td>
<td>ACCOUNT,ACCT, CLAIMRET, READING, RESADV, RESCANC</td>
<td>BH_TYPE</td>
</tr>
</tbody>
</table>

**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.

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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPAC Accept Cost</td>
<td>Whether patron will accept cost Y?N</td>
<td>N</td>
<td>OUC_COSTACCEPT</td>
</tr>
<tr>
<td>OPAC Author</td>
<td>Details entered on Line 2 of the form – usually Author</td>
<td></td>
<td>OUC_LINE2</td>
</tr>
<tr>
<td>OPAC Call No</td>
<td>Details entered on Line 6 of the form – usually Call No</td>
<td></td>
<td>OUC_LINE6</td>
</tr>
<tr>
<td>OPAC Comments</td>
<td>Comments entered for the request</td>
<td></td>
<td>OUC_COMMENTS</td>
</tr>
<tr>
<td>OPAC Date</td>
<td>Date of the request</td>
<td></td>
<td>OUC_DATE</td>
</tr>
<tr>
<td>OPAC Estimated Cost</td>
<td>Estimated cost of the request</td>
<td></td>
<td>OUC_ESTCOST</td>
</tr>
<tr>
<td>OPAC Form code</td>
<td>Form code of the item requested</td>
<td>DVD</td>
<td>OUC_FORM</td>
</tr>
<tr>
<td>OPAC Library Response</td>
<td>Notes given by the Library Staff as a response</td>
<td>Your request has been received. We will respond by the end of the week</td>
<td>OUCR_LIBRESPONSE</td>
</tr>
<tr>
<td>OPAC Location</td>
<td>Location Code of the Request</td>
<td>CHEL</td>
<td>OUC_LOCATION</td>
</tr>
<tr>
<td>OPAC Location Details</td>
<td>Location Description of the Code from the Request</td>
<td>Chelsea Public Library</td>
<td>LIBLOCATIONS8.LL_NAME</td>
</tr>
<tr>
<td>OPAC Notes</td>
<td>Notes from the Request</td>
<td>Urgent request</td>
<td>OUC_NOTES</td>
</tr>
<tr>
<td>OPAC Publisher</td>
<td>Details entered on Line 6 of the form – usually Call No</td>
<td>Penguin, London</td>
<td>OUC_LINE3</td>
</tr>
<tr>
<td>OPAC Reply Date</td>
<td>Reply date of the response given by Staff</td>
<td>Not used 15/06/2015</td>
<td>OUCR_DATE</td>
</tr>
<tr>
<td>OPAC Reply Type</td>
<td>Reply type of the response given by Staff</td>
<td>Not used</td>
<td>OUCR_TYPE</td>
</tr>
<tr>
<td>OPAC Series</td>
<td>Details entered on Line 4 of the form – usually Series</td>
<td>Animorphs</td>
<td>OUC_LINE4</td>
</tr>
<tr>
<td>OPAC Subject</td>
<td>Details entered on Line 5 of the form – usually Subject</td>
<td>Family - Fiction</td>
<td>OUC_LINE5</td>
</tr>
<tr>
<td>OPAC Title</td>
<td>Details entered on Line 1 of the form – usually Type</td>
<td>Breathe</td>
<td>OUC_LINE1</td>
</tr>
<tr>
<td>OPAC Type</td>
<td>Request details: All are Item now so <strong>not used</strong></td>
<td>Item, Borrower or Opac.</td>
<td>OUC_TYPE</td>
</tr>
</tbody>
</table>

Last Updated: 10 February 2016
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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Periodical Call No</td>
<td>Call No as shown on the Copies window</td>
<td>REF PER NAT</td>
<td>PER_COPY.PC_CALL_NO</td>
</tr>
<tr>
<td>Periodical Circulation List</td>
<td>Circulation List</td>
<td>1234</td>
<td>PER_SUBS.PS_CIRC_LIST</td>
</tr>
<tr>
<td>Periodical Copies Due</td>
<td>The Number of Copies of Issues Due still due, on the Subscriptions/Issues window of Amlib</td>
<td>1</td>
<td>PER_ISSUES.PI_QTY_SUB</td>
</tr>
<tr>
<td>Periodical Copies Per Issue</td>
<td>The Number Copies Issues Due in total. This can be seen on the Subscriptions window</td>
<td>2</td>
<td>PER_SUBS.PS_QTY_DUE</td>
</tr>
<tr>
<td>Periodical Copies Received</td>
<td>The Number Issues Received. This can be seen on the Subscriptions/Issues window of Amlib</td>
<td>1</td>
<td>PER_ISSUES.PI_QTY_RECD</td>
</tr>
<tr>
<td>Periodical Copy Barcode</td>
<td>Barcode of the Stockitem received from Periodical</td>
<td>I984332</td>
<td>PER_COPY.PC_STK_ITEM_NO</td>
</tr>
<tr>
<td>Periodical Copy Title</td>
<td>Copy Description as shown in the Periodical Module (Issue Details)</td>
<td>Volume 49 Index No 1-4 Supplement to</td>
<td>PER_COPY.PC_DESCRIPTION</td>
</tr>
<tr>
<td>Periodical Date Recd</td>
<td>Date that the copy was received</td>
<td>Reading Time Vol 50 No 1 2006</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------</td>
<td>-------------------------------</td>
<td></td>
</tr>
<tr>
<td>Periodical Description</td>
<td>Description of the Issue</td>
<td>PER_ISSUES.PI_DESCRIPTION</td>
<td></td>
</tr>
<tr>
<td>Periodical Form Code</td>
<td>Form Code as set in Stock Defaults</td>
<td>PERIODICAL.PER_STK_FORM</td>
<td></td>
</tr>
<tr>
<td>Periodical Frequency</td>
<td>Frequency for the Periodical Subscription</td>
<td>PERIODICAL.PER_FREQ</td>
<td></td>
</tr>
<tr>
<td>Periodical ISSN</td>
<td>ISSN as shown on the Periodical</td>
<td>PERIODICAL.PER.ISSN</td>
<td></td>
</tr>
<tr>
<td>Periodical Issue Catalogue</td>
<td>Catalogue Reference attached to a Periodical Issue</td>
<td>PER_ISSUES.PI_CAT_REF</td>
<td></td>
</tr>
<tr>
<td>Periodical Issue Claim</td>
<td>Where a Claim has been made against an Issue Y/N</td>
<td>PER_ISSUES.PI_CLAIM</td>
<td></td>
</tr>
<tr>
<td>Periodical Issues Per Subs</td>
<td>The Number of Issues for each Subscription</td>
<td>PER_SUBS.PS_QTY_ISSUES</td>
<td></td>
</tr>
<tr>
<td>Periodical Item Stats Code</td>
<td>Form Code as set in Stock Defaults</td>
<td>PERIODICAL.PER_STATS_CODE</td>
<td></td>
</tr>
<tr>
<td>Periodical Main Title</td>
<td>The Title given to the Main Periodical Details</td>
<td>PERIODICAL.PER_TITLE</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Comments</td>
<td>Comments related to the Subscription</td>
<td>PER_SUBS.PS_COMMENTS</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Cost</td>
<td>Cost for the Subscription</td>
<td>PER_SUBS.PS_COST</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Cost per Issue</td>
<td>Subscription cost per Issue as calculated by the No of Issues and Subscription cost</td>
<td>PER_SUBS.PS_COST_ISSUE</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs End Date</td>
<td>The final date for the Subscription</td>
<td>PER_SUBS.PS_END_DATE</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Lib Group</td>
<td>The Library Group for the Subscription</td>
<td>PER_SUBS.PS_LIB_GROUP</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Location</td>
<td>The Location Code for the Subscription</td>
<td>PER_SUBS.PS_LL_CODE</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Location Details</td>
<td>The Description given to the Location Code of the Subscription</td>
<td>LIB_LOCATIONS7.LL_NAME</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Renewal Date</td>
<td>The Renewal Date given to the Subscription</td>
<td>PER_SUBS.PS_RENEW_DATE</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Start Date</td>
<td>The beginning date of the Subscription</td>
<td>PER_SUBS.PS_START_DATE</td>
<td></td>
</tr>
<tr>
<td>Periodical Subs Supplier</td>
<td>The Supplier Code for the Subscription</td>
<td>PER_SUBS.PS_SUPP_NO</td>
<td></td>
</tr>
<tr>
<td>Periodical Supplier Details</td>
<td>The Description given to the Supplier Code</td>
<td>PER_SUPPLIER.PS_COMPANY</td>
<td></td>
</tr>
</tbody>
</table>
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

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

<table>
<thead>
<tr>
<th>Status of Reservation: ILLS, ON LOAN, ORDER, PRINTED, RETURN, SHELF, TRANSFER</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRINTED</td>
</tr>
</tbody>
</table>

Reservation User Placed

<table>
<thead>
<tr>
<th>Amlib Operator who placed the reserve</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAFF</td>
</tr>
</tbody>
</table>

STATISTICS

Statistics can be shown effectively as graphs

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

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

<table>
<thead>
<tr>
<th>Statistics Money Amount</th>
<th>Money amount collected</th>
<th>15.00</th>
<th>STATS_MONEY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statistics Month 0 12</td>
<td>Month of collection of statistics 1 – January to 12 December</td>
<td>IN 10,11,12</td>
<td>STATS_MONTH</td>
</tr>
<tr>
<td>Statistics Transaction Date</td>
<td>Date of collection of statistics by specific date</td>
<td>&lt; 31/12/2015</td>
<td>STATS_DATE</td>
</tr>
<tr>
<td>Statistics Type 05 06 etc.</td>
<td>Number used for collection of Statistics. See Supervisor, Stats Params (05 – Issues, 06 – Renewals etc.)</td>
<td>05</td>
<td>STATS_TYPE</td>
</tr>
<tr>
<td>Statistics Type Details</td>
<td>Description used for Stats parameters</td>
<td>Issues</td>
<td>STATS_CODES.STATS_DESCRIPTION</td>
</tr>
<tr>
<td>Statistics Year 2014 etc.</td>
<td>Year of collection of statistics</td>
<td>2015</td>
<td>STATS_YEAR</td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name – uses STK_HISTORY Table unless shown otherwise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock History Borrower Barcode</td>
<td>Borrower Barcode for the History Transaction</td>
<td>B44332</td>
<td>SH_BOR_NO</td>
</tr>
<tr>
<td>Stock History Comments</td>
<td>Comments recorded for the History transaction</td>
<td>Circ issue at VIC by IS1 to RICCI, DEANNE Due: 06/11/2007 11:59 PM</td>
<td>SH_COMMENTS</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------</td>
<td>---------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Stock History Date</td>
<td>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</td>
<td>dd/mm/yyyy 22/08/2015 dd/mm/yyyy hh:mm tt 22/08/2015 09:54 AM</td>
<td>SH_DATE</td>
</tr>
<tr>
<td>Stock History Item</td>
<td>Item Barcode for the History Transaction</td>
<td>I33442</td>
<td>SH_STK_ITEM_NO</td>
</tr>
<tr>
<td>Stock History Type</td>
<td>The History Type available includes ORDER, PRICE, TRANSFER, RENEW, RETURN, ISSUE, INHOUSE, RES.HIST</td>
<td>ISSUE</td>
<td>SH_TYPE</td>
</tr>
</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
<th>Example</th>
<th>Database Name – uses STK_ITEM Table unless shown otherwise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Author</td>
<td>Stock Line 2 of Stockitem Display – usually Author</td>
<td>Winton, Tim.</td>
<td>STK_LINE2</td>
</tr>
<tr>
<td>Item Barcode</td>
<td>Item Barcode as shown on the Stockitem window</td>
<td>I635589</td>
<td>STK_ITEM_NO</td>
</tr>
<tr>
<td>Item Call No</td>
<td>Stock Line 6 of Stockitem Display – usually Call No</td>
<td>F WIN</td>
<td>STK_LINE6</td>
</tr>
<tr>
<td>Item Call Set</td>
<td>Item Call Set as set via the Call Set Table</td>
<td>FOLK</td>
<td>STK_CALL_SET</td>
</tr>
<tr>
<td>Item Call Set Details</td>
<td>Description of the Call set as set on the Call Set Table</td>
<td>Folktales</td>
<td>STK_CALL_SETSETS.SC_DESC</td>
</tr>
<tr>
<td>Item Catalogue Reference</td>
<td>Catalogue reference attached to the Stockitem</td>
<td>139032</td>
<td>STK_CAT_REF</td>
</tr>
<tr>
<td>Item Convert Value</td>
<td>Item Convert Value as shown on the Stockitem Window. This Field can have a different Heading as set in Supervisor/Installation</td>
<td>Signed by Author</td>
<td>STK_CONVERT_VALUE</td>
</tr>
<tr>
<td>Item Cost</td>
<td>Item Current Cost as shown in the Stockitem Window</td>
<td>25.50</td>
<td>STK_COST</td>
</tr>
<tr>
<td>Item Date Accessed</td>
<td>Date accessioned as shown in the Stockitem Window</td>
<td>12/05/2015</td>
<td>STK_DATE_ACC</td>
</tr>
<tr>
<td>Item Date Modified</td>
<td>Date the item was last modified</td>
<td>01/01/2015</td>
<td>STK_DATETIME</td>
</tr>
<tr>
<td>Item Date Received</td>
<td>Date the item was received</td>
<td>31/12/2015</td>
<td>STK_DATE_RECD</td>
</tr>
<tr>
<td>Item Description</td>
<td>Item Description Value as shown on the Stockitem Window. This Field can have a different Heading as set in Supervisor/Installation</td>
<td>Part of a Big Book set</td>
<td>STK_DESCRIPTION</td>
</tr>
<tr>
<td>Item Edition</td>
<td>Edition Field as shown on the Stockitem window. Sometimes shows the Year of publication</td>
<td>2nd ed.</td>
<td>STK_EDITION</td>
</tr>
<tr>
<td>Item File Date</td>
<td>File Date created or Date modified.</td>
<td>22/06/2015</td>
<td>FILE_SET_NAMES1.FILE_DATE</td>
</tr>
<tr>
<td>Item File Description</td>
<td>Description used to Name the File</td>
<td>Admin Load 22/06</td>
<td>FILE_SET_NAMES1.FILE_DESC</td>
</tr>
<tr>
<td>Item File Entries</td>
<td>The number of entries within the File</td>
<td>121</td>
<td>FILE_SET_NAMES1.FILE_QTY</td>
</tr>
<tr>
<td>Item File Number</td>
<td>The unique File Number. This is recommended to pinpoint a particular File (as the description may not be unique to each File)</td>
<td>3554</td>
<td>FILE_SET_NAMES1.FILE_NUMBER</td>
</tr>
<tr>
<td>Item File Operator</td>
<td>File Operator (User name)</td>
<td>STAFF</td>
<td>FILE_SET_NAMES1.FILE_OPER</td>
</tr>
<tr>
<td>Item File Operator Access</td>
<td>Whether other Users are allowed to access the File Y/N</td>
<td>Y</td>
<td>FILE_SET_NAMES1.FILE_OPERATOR_ACCESS</td>
</tr>
<tr>
<td>Item Floor Location</td>
<td>Floor location as shown on the Stockitem window</td>
<td>Map drawer</td>
<td>STK_LOC_FLOOR</td>
</tr>
<tr>
<td>Item For Loan?</td>
<td>Whether the item is allowed to be loaned or not. Y/N</td>
<td>N</td>
<td>STK_FOR_LOAN</td>
</tr>
<tr>
<td>Item Form</td>
<td>Item Form Code as currently set. Usually the basis for the Loan parameters</td>
<td>LP</td>
<td>STK_FORM</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----</td>
<td>----------</td>
</tr>
<tr>
<td>Item Form Details</td>
<td>Description of the Item Form Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Item is on Loan?</td>
<td>Whether the item is on loan or not. Y/N</td>
<td>Y</td>
<td>STK_IS_ON_LOAN</td>
</tr>
<tr>
<td>Item is on Order?</td>
<td>Whether the item is on Order. Y/N</td>
<td>N</td>
<td>STK_IS_ON_ORDER</td>
</tr>
<tr>
<td>Item is on Reserve?</td>
<td>Whether the item is reserved. Y/N</td>
<td>Y</td>
<td>STK_IS_RESERVED</td>
</tr>
<tr>
<td>Item Last Active Date</td>
<td>Date of last active Circulation activity</td>
<td>12/05/2015</td>
<td>STK_LAST_ACTIVE</td>
</tr>
<tr>
<td>Item Last Depreciation Date</td>
<td>Date of the last depreciation process</td>
<td>30/06/2015</td>
<td>STK_LAST_DEP</td>
</tr>
<tr>
<td>Item Library Group</td>
<td>Library Group related to the permanent Location</td>
<td>LIB</td>
<td>STK_LIB_GROUP</td>
</tr>
<tr>
<td>Item Loan Type</td>
<td>Item Loan Type if this applies. This is set on the Stockitem window and overwrites normal borrowing privileges</td>
<td>OV</td>
<td>STK_LOAN_TYPE</td>
</tr>
<tr>
<td>Item Memo Date</td>
<td>Item Memo Date created</td>
<td>23/06/2015</td>
<td>STK_MEMOS.SM_EFF_DATE</td>
</tr>
<tr>
<td>Item Memo Details</td>
<td>Item Memo Details contained in the Memo</td>
<td>Item is damaged. Repair on return</td>
<td>STK_MEMOS.SM_DATA</td>
</tr>
<tr>
<td>Item Memo Type</td>
<td>Memo Type from Supervisor/Memo Types Table used by Item</td>
<td>SBARCODE</td>
<td>STK_MEMOS.SM_TYPE</td>
</tr>
<tr>
<td>Item Memo Type Details</td>
<td>Memo Type Description from Supervisor/Memo Types Table for the Memo Type</td>
<td>System change barcode rule</td>
<td>LIB_MEMOS1.LM_DESC</td>
</tr>
<tr>
<td>Item Original Cost</td>
<td>Original Cost as set in Stockitem/History</td>
<td>15.00</td>
<td>STK_ORIG_COST</td>
</tr>
<tr>
<td>Item Perm Location</td>
<td>Permanent Location Code currently assigned to the item</td>
<td>CHEL</td>
<td>STK_LOC_PERM</td>
</tr>
<tr>
<td>Item Perm Location Details</td>
<td>Description of the Permanent Location Code</td>
<td>Chelsea Public Library</td>
<td>LIB_LOCATIONS122.LL_NAME</td>
</tr>
<tr>
<td>Item Process Code</td>
<td>Process or Status Code as set on the Stockitem window</td>
<td>MISSING</td>
<td>STK_PROCESS</td>
</tr>
<tr>
<td>Item Process Date</td>
<td>Date the process was assigned to the Stockitem</td>
<td>01/01/2013</td>
<td>STK_PROCESS_DATE</td>
</tr>
<tr>
<td>Item Publisher</td>
<td>Line 5 of the Stockitem Display – usually Publisher</td>
<td>London : Penguin, 2019.</td>
<td>STK_LINES</td>
</tr>
<tr>
<td>Item Series</td>
<td>Line 4 of the Stockitem Display – usually Series</td>
<td>Animorphs v6.</td>
<td>STK_LINE4</td>
</tr>
<tr>
<td>Item Show in Opac?</td>
<td>Whether the Stockitem can be displayed in Opac Y/N</td>
<td>Y</td>
<td>STK_OPAC_SHOW</td>
</tr>
<tr>
<td>Item Source</td>
<td>The Origin Code of the Stockitem. Some sites use this to populate a Supplier or funding</td>
<td>DYM</td>
<td>STK_ITEM_ORIGIN</td>
</tr>
<tr>
<td>Item Stats Code</td>
<td>The Stats Code of the Stockitem</td>
<td>JF</td>
<td>STK_ITEM_STATS</td>
</tr>
<tr>
<td>Item Stats Code Details</td>
<td>The description of the Stockitem Stats Code</td>
<td>Junior Fiction</td>
<td>STK_CODES.STK_CODE_DESC</td>
</tr>
<tr>
<td>Item Stocktake Date</td>
<td>The date of the last Stocktake as shown in Stockitem History/Stocktake</td>
<td>01/12/2014</td>
<td>STK_LAST_TAKE</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Item Subject</td>
<td>Line 3 of the Stockitem Display – usually Subject. Note that the Stockitem only shows 1 of the Subjects from the Catalogue</td>
<td>Family - Fiction</td>
<td>STK_LINE3</td>
</tr>
<tr>
<td>Item Temp Location</td>
<td>The Temporary Location Code that is displayed on the Stockitem window</td>
<td>ARM</td>
<td>STK_LOC_TEMP</td>
</tr>
<tr>
<td>Item Temp Location Details</td>
<td>The description of the Temporary Location Code</td>
<td>Armadale Public Library</td>
<td>LIB_LOCATIONS121.LL_NAME</td>
</tr>
<tr>
<td>Item Times Borrowed Total</td>
<td>The number of times borrowed since the beginning or since Period set as displayed in the Stockitem History</td>
<td>360</td>
<td>STK_TIMES_BORROWED</td>
</tr>
<tr>
<td>Item Times Renewed Total</td>
<td>The number of times renewed since the beginning or since Period set as displayed in the Stockitem History</td>
<td>24</td>
<td>STK_TIMES_RENEWED</td>
</tr>
<tr>
<td>Item Times Reserved Total</td>
<td>The number of times reserved since the beginning or since Period set as displayed in the Stockitem History</td>
<td>29</td>
<td>STK_TIMES_RESERVED</td>
</tr>
<tr>
<td>Item Title</td>
<td>The Main Title of the item</td>
<td>Black horse island</td>
<td>STK_LINE1</td>
</tr>
<tr>
<td>Item Type</td>
<td>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</td>
<td>Normal</td>
<td>STK_ITEM_TYPE</td>
</tr>
<tr>
<td>Item Volume</td>
<td>The Volume as shown on the Stockitem. This is sometimes set to the Series No</td>
<td>V22</td>
<td>STK_VOLUME</td>
</tr>
</tbody>
</table>
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 varchar to numeric

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

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>dd</td>
<td>The day of the month, from 01 through 31</td>
<td>01</td>
</tr>
<tr>
<td>ddd</td>
<td>The abbreviated name of the day of the week</td>
<td>Mon</td>
</tr>
<tr>
<td>dddd</td>
<td>The full name of the day of the week</td>
<td>Monday</td>
</tr>
<tr>
<td>hh</td>
<td>The hour, using a 12-hour clock from 01 to 12.</td>
<td>01</td>
</tr>
<tr>
<td>HH</td>
<td>The hour, using a 24-hour clock from 0 to 23</td>
<td>13</td>
</tr>
<tr>
<td>mm</td>
<td>The minute, from 00 through 59</td>
<td>09</td>
</tr>
<tr>
<td>MM</td>
<td>The month, from 01 through 12</td>
<td>06</td>
</tr>
<tr>
<td>MMM</td>
<td>The abbreviated name of the month</td>
<td>Jun</td>
</tr>
<tr>
<td>MMMM</td>
<td>The full name of the month</td>
<td>June</td>
</tr>
<tr>
<td>ss</td>
<td>The second, from 00 through 59</td>
<td>09</td>
</tr>
<tr>
<td>tt</td>
<td>The AM/PM designator</td>
<td>PM</td>
</tr>
<tr>
<td>yy</td>
<td>The year, from 00 to 99</td>
<td>15</td>
</tr>
<tr>
<td>yyyy</td>
<td>The year as a four-digit number</td>
<td>2009</td>
</tr>
<tr>
<td>:</td>
<td>The time separator</td>
<td>hh:mm</td>
</tr>
<tr>
<td>/</td>
<td>The date separator</td>
<td>10/08/2009</td>
</tr>
</tbody>
</table>
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

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