

Quick report for monthly cataloging review

Jenn Durham 5/12/2016

Note: Added 2 permissions to Cat1 profile: CREATE_REPORT_TEMPLATE & RUN_REPORTS with Depth =System .

At Main Screen, click on **PINES Quick Reports** and login

Create the Report

Click **Quick Report Templates** or **New Quick Report**

Click **+Items** to expand for selection

Scroll down to "List Items of Added" and click **Create a Report**

Suggested settings for a monthly report: Complete fields and click **Run Report**.

The screenshot displays the APINES Quick Reports interface. At the top, the APINES logo is on the left, and the user's name "Welcome, Jennifer Durham" with a "Log Out" link is on the right. Below the header is a navigation bar with links for "Home", "Quick Report Templates", "My Quick Reports", and "My Draft Reports".

The main content area is divided into several sections:

- Template Information:** Shows the template name "List of Items Added" with a "Description" link. Below it, a list of report columns is provided: Owning Library, Create Date, Shelving Location, Call Number, Title, Author, Barcode, TCN, Circ Modifier, Price, Legacy Stat Cat 1 Value, and Legacy Stat Cat 2 Value.
- Report Title:** Includes a "Report Name" field containing "Cataloging Maintenance Report" and a "Report Description" field with a text area containing: "Monthly report that covers from 32 Days ago to 1 Day ago for all SRPL libraries. Used by Cataloger to spot processing errors and to get count of items added per month. Note - includes 31 days of data. For shorter months, don't forget to delete repeat data for your monthly count."
- Choose Report Filters:** A table with columns "Column", "Condition", and "Value".

Column	Condition	Value
Classic Item List -> Create Date	Between	Relative Date 32 Days ago And Relative Date 1 Day ago
Classic Item List -> Owning Lib -> Organizational Unit ID	In List	Dropdown menu with selected items: STRL-METT, STRL-PEMB, STRL-RHILL, STRL-SBORO, STRL-SWAIN, ARCPPLS, ARCPPLS-APPV. A "Selected:" list on the right shows: STRL-CLAX, STRL-METT, STRL-PEMB, STRL-RHILL, STRL-SBORO, STRL-SWAIN.
- Choose Report Output Options:** Includes "Recurrence Interval" (Run one time only or Recur every 1 Month(s)), "Run Time" (As soon as possible or At a scheduled time on 06/01/2016 at Midnight AM), "Email Notification" (jennd@strl.info), and "Output Options" (Excel Output, CSV Output, HTML Output, Bar Charts, Line Charts).

At the bottom of the form are two buttons: "Run Report" and "Save as Draft".

Notes:

- Each report must have a unique name
- Use Shift+Click or Ctrl+Click to select multiple owning libraries from list
- Setting the first **Run Time** to be the first day of the month will yield the prior 31 days. E.g.: If report above runs on 06/01/2016 the dates yielded will include 05/01/2016–05/31/2016. Months with fewer than 31 days will have a day or two from the earlier month. Sort by Date to delete those.
- Click **+Show All Options** to select Output Options.
- Excel will truncate barcodes. Instructions to correct display included below.

TIP: You can backdate the scheduled time. If today is 05/13/2016 and the first scheduled run time is 02/01/2016, the system will run reports as though it were Feb 1, Mar 1, Apr 1 and May 1.

View output

Select **My Quick Reports**

Click **+Items** to expand for selection

Look for completed reports below the pale green line. Any report that has not finished or has a future run date will be above the green line.

Locate the report and click the report’s name.

Enter login credentials if required

Choose **Excel Output**

Open your downloaded content

- Items					
Run Date	Report Name	Description	Template Name	Recurs	Actions
06/01/2016	Cataloging Maintenance Report	Monthly report that covers from 32 Days ago to 1 Day ago for all SRPL libraries. Initial run date June 1, 2016 Used by Cataloger to spot processing errors and to get count of items added per month. Note - includes 31 days of data. For shorter months, don't forget to delete repeat data for your monthly count.	List of Items Added	1 mon	Cancel Report Edit Report
Completed Reports					
05/01/2016	Cataloging Maintenance Report	Monthly report that covers from 32 Days ago to 1 Day ago for all SRPL libraries. Initial run date June 1, 2016 Used by Cataloger to spot processing errors and to get count of items added per month. Note - includes 31 days of data. For shorter months, don't forget to delete repeat data for your monthly count.	List of Items Added	1 mon	Run Again Delete Report
04/21/2016	List of Claims returned	list of items marked claims returned	List of Items Marked Claims Returned		Run Again Delete Report

1	Owning Library	Create Date	Shelving Location	Call Num	Title	Author	Barcode	TCN	Circ Modif	Price	Legacy Sta	Legacy Stat	Cat 2	Value
2	STRL-CLAY	2016-03-31	AV	DVD FIC A	american wedding		3.11E+13	ocm53085	dvd	20	GIFT	ADULT		
3	STRL-CLAY	2016-03-31	AV	DVD FIC B	breach		3.11E+13	ocm86237	dvd	20	GIFT	ADULT		
4	STRL-CLAY	2016-03-31	AV	DVD FIC B	the break up		3.11E+13	ocm70723	dvd	20	GIFT	ADULT		
5	STRL-CLAY	2016-03-31	AV	DVD FIC C	catch me if you can		3.11E+13	ocm51854	dvd	20	GIFT	ADULT		
6	STRL-CLAY	2016-03-31	AV	DVD FIC G	gone in sixty second		3.11E+13	ocm52884	dvd	20	GIFT	ADULT		
7	STRL-CLAY	2016-03-31	AV	DVD FIC K	killers		3.11E+13	ocn65035	dvd	20	GIFT	ADULT		
8	STRL-CLAY	2016-03-31	AV	DVD FIC M	made of honor		3.11E+13	ocn22945	dvd	20	GIFT	ADULT		
9	STRL-CLAY	2016-03-31	AV	DVD FIC I	i do but i dont		3.11E+13	ocm57681	dvd	20	GIFT	ADULT		
10	STRL-CLAY	2016-03-31	AV	DVD FIC J	john tucker must die		3.11E+13	ocm71794	dvd	20	GIFT	ADULT		
11	STRL-CLAY	2016-03-31	AV	DVD FIC L	loves unending lega		3.11E+13	ocn18258	dvd	20	GIFT	ADULT		
12	STRL-CLAY	2016-03-31	AV	DVD FIC M	the mexican		3.11E+13	ocm47961	dvd	20	GIFT	ADULT		
13	STRL-CLAY	2016-03-31	AV	DVD FIC N	national treasure, br		3.11E+13	ocn19175	dvd	20	GIFT	ADULT		

Notes:

- You may need to click **Enable Editing** or save the report locally before making any changes
- If you are looking at the bottom row number to get a count of items cataloged, don't forget to subtract one for the Header Row.
- Use File → Save As to save a copy locally.
- The original version of the report will remain in your Completed Reports section

Format barcode column if desired:

Right click on column letter to select

Choose **Format Column**

On Number tab, under Category, click **Number**

Change Decimal places to **zero**

Click **OK**

Formatting columns to wrap text:

Right click on column's letter to select

Choose **Format Column**

On Alignment tab, under Text control, check **Wrap Text**

Click **OK**

TIP: To select multiple columns - use Shift+ left click to select columns. Right click on any selected column to choose Format Column

TIP: To format all columns, Right Click top left corner of sheet (grey arrow between 1 and A)

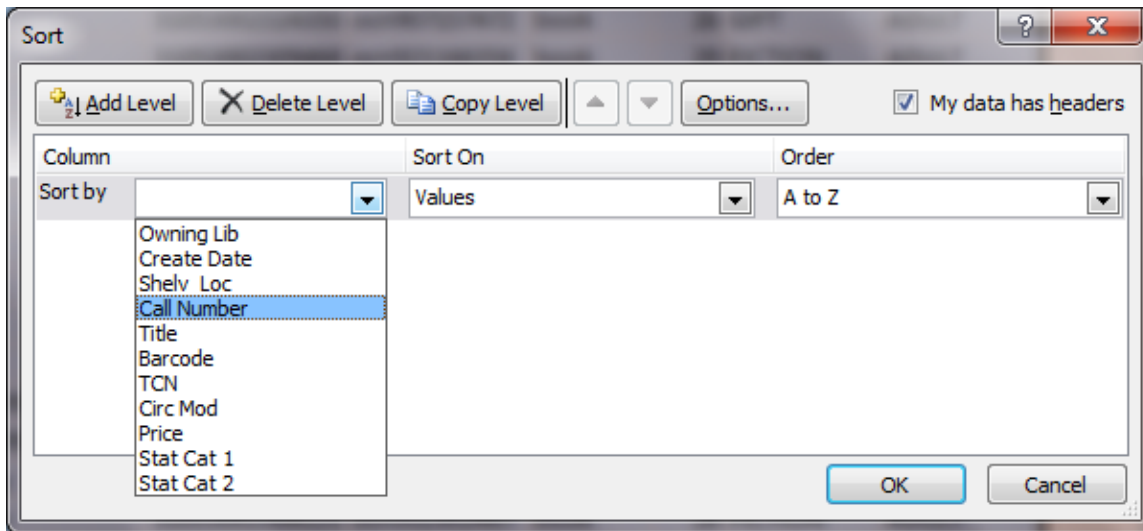
Basic Sort & Filter instructions

Click **Sort & Filter** and choose **Custom Sort**

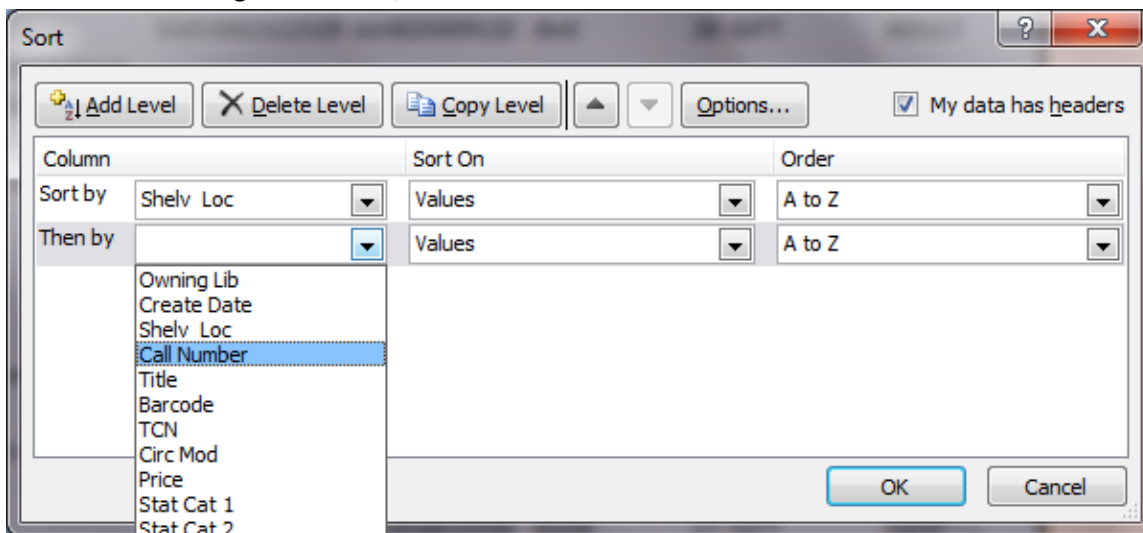


TIP: Be sure the box is checked for **My data has headers!**

Use **Sort by** drop down box to choose the first column to sort

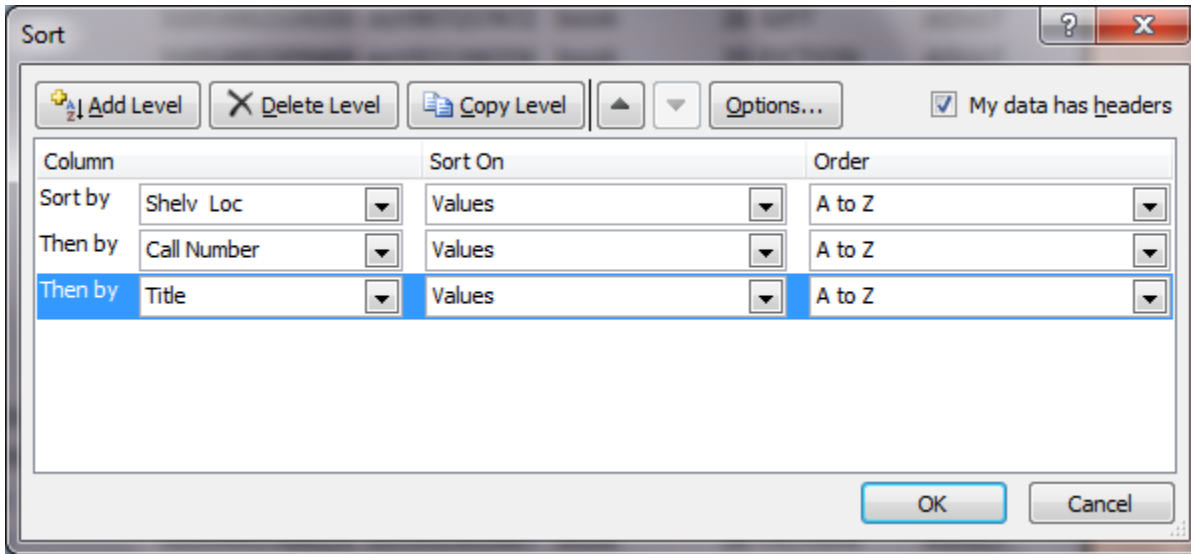


To add more sorting instructions, click the **Add Level** button



Working with sorting instructions:

Click on the white space on any line to select it. Once selected you can **Delete** the line, or use the up and down arrows to arrange the order of sorting instructions. When done, click **OK**.



TIP: Don't like the results of your sorting instructions? Use **Ctrl+z** to undo the sorting action.

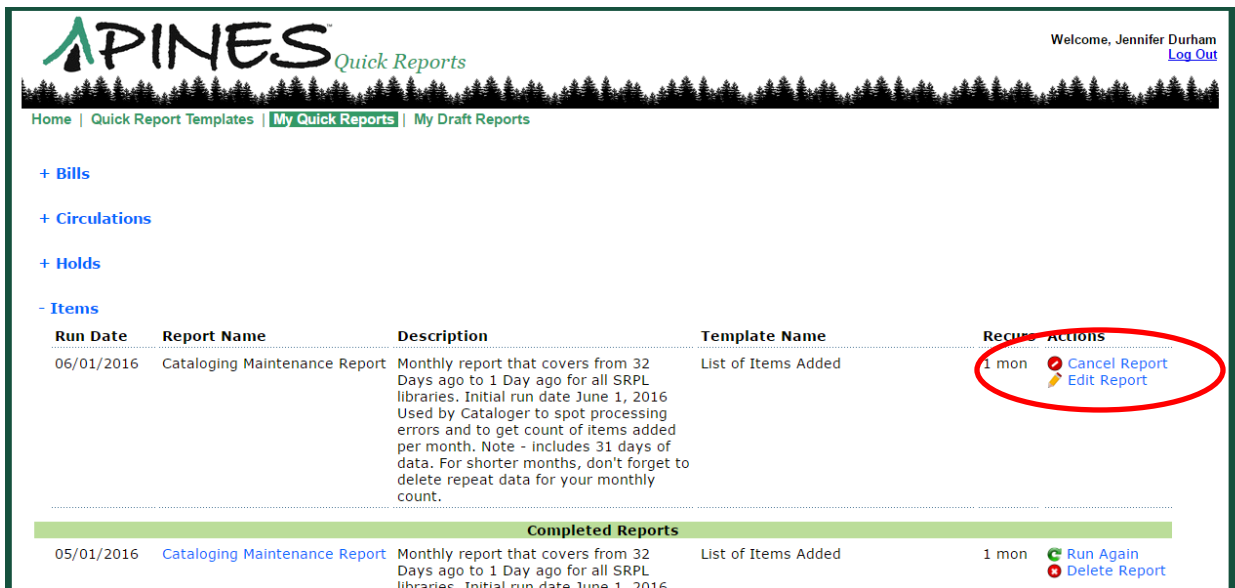
Edit a recurring or future report

Locate report in **My Quick Reports**.

Click **Edit Report**.

Make desired changes, verify other selections, and click **Update Report**.

TIP – Watch out for changes to the original data. In this case, the relative dates both went back to 1.



Sample errors that were easy to spot by alphabetizing or grouping data

Typo

0:15-	YA	YA FIC VANDE VELDE, VI	23 min
0:15-	YA	YA FIC VANDE VELDE, VI	23 min
4:31-	YA	YA FIC VIVIAN, SIOBHAN	world
4:46-	YA	YA FOC LORE, PITTACUS	the fat
1:58-	YA	YA LP PB FIC ROWLING, J	death
3:46-	YA	YA PB FIC CLARE, CASSA	city of

Shelving Locations

13:56:59-	PBK	PB FIC ELLIS, SHELLY	another w
14:12:42-	ADULT	PB FIC EVANOVICH, JAN	tricky twe
14:30:58-	PBK	PB FIC FORSTER, GWYNN	a change l
14:30:58-	PBK	PB FIC FORSTER, GWYNN	a change l
15:08:17-	PBK	PB FIC FOSTER, LORI	fighting d

Circ Modifier

3002322578	ocn820812661	statepass	50	NONFICTI
3002322537	ocn820812661	statepass	50	NONFICTI
3002322586	ocn820812661	kit	50	NONFICTI

Stat Cat 2

[GRAPHIC] JUV PB FIC H/	spacegirl	book	JUVENILE
[GRAPHIC] JUV PB FIC M/	fairy tail	book	JUVENILE
DVD FIC MAZE	maze runner	dvd	JUVENILE
DVD FIC SOME	some things gotta give	dvd	JUVENILE
DVD FIC TOY	the toy	dvd	JUVENILE
DVD FIC WE	we are marshall	dvd	JUVENILE
DVD JUV 22 955 ANIM	the new testament	dvd	JUVENILE

Missing data

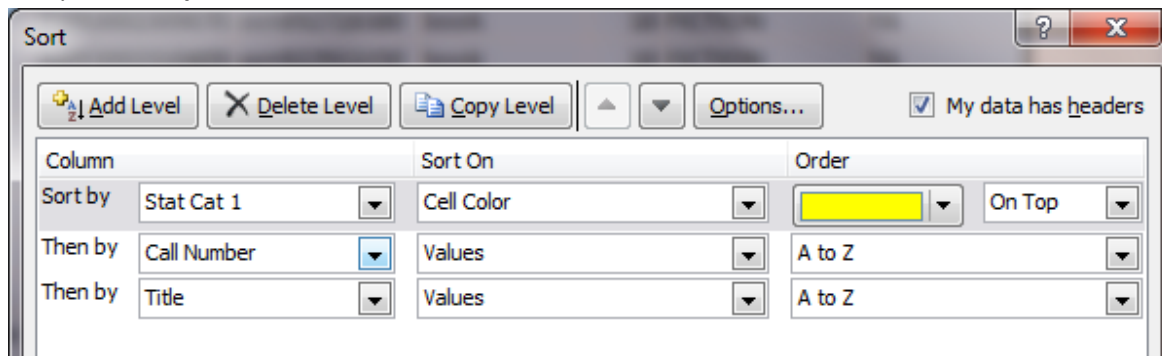
city high	31053002324483	ocn1870400310	BOOK	10	NONFICTION	TA
queen of	31053002308049	ocn945668131		0		

Use color with Sort & Filter to create your final action list

As you spot issues, right click on the Row Number and choose a highlight color to fill the row.

1278	2016-04-07 17:50:15-	YA	YA FIC VANDE VELDE, VI	23 minutes	31053002304451
127			FIC VANDE VELDE, VI	23 minutes	31053002304444
128				the last boy and girl in the	
128			FIC VIVIAN, SIOBHAN	world	31053002310441
1281	2016-04-08 16:24:46-	YA	YA FOC LORE, PITTACUS	the fate of ten	31053002306159
128				harry potter and the	
128		YA	YA LP PB FIC ROWLING, J	deathly hallows	31053002324277
128		YA	YA PB FIC CLARE, CASSA	city of ashes	31053002309690

When you are done, Use **Sort & Filter** to choose a column and **Sort On** cell color. Choose the color under **Order** and put **“on top”**.



Result – all the highlighted items are at the top and easy to copy or print. You can do the same by font color.

	B	C	D	E	F	G	H	I	J	K
	Create Date	Shelv Loc	Call Number	Title	Barcode	TCN	Circ Mod	Price	Stat Cat 1	Stat Cat 2
2	2016-04-28 09:04:43-	JUV	[GRAPHIC] JUV FIC FRIDC	secret hero society	31053002324541	ocn913304595	book	13	GIFT	JUVENILE
3	2016-03-30 16:14:12-	AV	DVD FIC MAZE	maze runner	31053002320218	ocn927781057	dvd	20	GIFT	JUVENILE
4	2016-04-07 16:40:18-	AV	DVD FIC SOME	some things gotta give	31053002322180	ocm53997078	dvd	20	GIFT	JUVENILE
5	2016-03-30 16:15:35-	AV	DVD FIC TOY	the toy	31053002320226	ocm58397244	dvd	20	GIFT	JUVENILE
6	2016-03-30 16:16:52-	AV	DVD FIC WE	we are marshall	31053002320234	ocn123981536	dvd	20	GIFT	JUVENILE
7	2016-03-30 15:27:35-	AV	DVD JUV FIC APPL	the apple dumpling gang	31053002320077	ocn261226950	dvd	20	GIFT	ADULT
8	2016-04-12 08:18:00-	Stacks	FIC YISHAI-LEVI, SARIT	jerusalem	31053002308049	ocn945668131		0		
9	2016-04-06 14:12:42-	ADULT	PB FIC EVANOVICH, JANI	tricky twenty two	31053002321984	ocn913098478	book	28	GIFT	ADULT
10	2016-04-19 13:20:27-	BHDESK	PUPPETRY PASS 2016	passport to puppetry	31053002322586	ocn820812661	kit	50	NONFICTION	ADULT/JUV
11	2016-04-08 16:24:46-	YA	YA FOC LORE, PITTACUS	the fate of ten	31053002306159	ocn913099328	book	19	FICTION	YA
12	2016-04-05 14:41:08-	GRAPHIC	[GRAPHIC] JUV FIC DAUV	hidden	31053002321695	ocn846545746	book	17	GIFT	JUVENILE