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Unit 1: Overview of Staff-Generated Reports

Reports may be generated by library staff as needed by using the Services menu within the Circulation, Acquisitions/Serials and Cataloging modules. These ad hoc reports and services allow library staff to enter a variety of parameters and retrieve reports from the Task Manager.

Staff permissions are required to run all LINCC reports; supervisors should already have the required permissions. If necessary, changes can be made by submitting a LINCC Staff Privileges Request Form, available from FLVC’s Library Staff Resources web page.

LINCC reports are also automatically system generated on a daily, weekly, monthly, and annual basis. These system-generated reports may be delivered to library staff through the web-based LINCC Reports Service (LRS) or through the Task Manager, depending on the nature of the report.

Lesson 1: Acquisitions Reports Overview

The LINCC Acquisitions/Serials module provides access to several categories of reports. Acquisitions reports can be accessed from the Services menu by pointing to any of the following categories: Orders and Claims, Retrieve and Print Acquisitions Records, Budget Management, Other, and Statistics. Reports within the Retrieve and Print Acquisitions Records category require that the Print Acquisitions service is also run as a second step.

In addition to reports, the Services menu also provides access to processes used in the acquisitions workflow. These processes are described in the LINCC Acquisitions manual.

This lesson describes acquisitions reports and categories available in the Acquisitions/Serials module. Unit 2 provides examples of selected reports and descriptions of report parameters.

History

The History menu option displays a list of services that were previously submitted.

Only services with the Add to History check box selected will be included. To display the parameters, select a line and click Open.

Parameters can be changed and the service can be resubmitted. The History feature is available in the Cataloging and Circulation modules as well.
Orders and Claims

- **Order-Log Report**: Generates a report of information manually entered in the order log.
- **Claim Report and Letters for Monograph Orders**: Generates a report of monograph orders that have not yet arrived. Printing claim letters is optional.
- **Claim Report for Standing Orders**: Generates a report of standing orders that have not arrived within the time period designated on the order form.
- **Claim Report for Serials Orders**: Generates a report of serial orders that have not arrived.

Retrieve and Print Acquisitions Records

- **Partially-Filled Monograph Orders**: Generates a list of monograph orders that have either not been received or have been partially received.
- **Monograph Orders – Status “NEW”**: Generates a list of monograph orders with an order status of NEW.
- **No Invoice**: Generates a list of monograph orders that have not been invoiced or have been partially invoiced.
- **Order Status**: Generates a list of orders with a given order status selected by library staff.
- **Order Cancelled by Vendor**: Generates a list of monograph orders with an order status of VC.
- **General Retrieval Form**: Produces a variety of customizable reports.

The reports listed in the Retrieve and Print Acquisitions Records category above work in conjunction with the Print Acquisitions Records service, used to select the column headings that will appear on each report. This feature is described in Unit 2.
Budget Management

- **Budget Summary**: Provides summaries of all budgets including allocations, transfers, encumbrances, and expenditures.

- **List of Orders per Budget**: Generates a list of all budgets and their associated encumbered orders.

Other

- **Invoice Report**: Produces a report of all invoices.

Statistics

- **Statistics by Dates – Material/Month**: Produces statistics for a specified date range. Includes material type and month of purchase.

EDI, General

No reports are contained in the EDI or General menu options.
Lesson 2: Serials Reports Overview

This lesson describes serials reports and categories available in the Acquisitions/Serials module. All serials reports are available from the Services menu by pointing to the Serials menu option. Unit 2 provides examples of selected reports and descriptions of report parameters.

Claims
- **Print Claim Letters/Reports**: Produces a claim list of all serial items that have not arrived within a defined period after their Issue Date. That period (delay) is defined in the second tab of the Subscription Information Form for the title. System generated monthly as S009.

Routing
- **Report of Routing List Members**: Produces a report listing the serial titles that are routed to library users. It shows the users both in their role as Routing Group Leaders and as Routing Group Members.
- **Letters to Routing List Members**: Produces a letter for each member of every Routing Group, listing the titles being circulated in all the Routing Groups to which they belong.

Check-In
- **List of Serial Titles + Number of Arrived Issues**: Retrieves serial titles for issues that have arrived in the specified time frame. Produces a statistical report that includes the serial titles and the number of issues that have arrived. The report can be generated for all libraries or limited to a particular sublibrary.
- **Print Arrived Issues Report**: Creates a report listing the serial items that have arrived within the defined period.
- **Issues Arrival Statistics by Sublibrary – Dates**: Produces a statistical report of the number of issues that have arrived within a specified range of dates. Grouped by sublibrary and then by collection. The total of arrivals is provided for each sublibrary. A grand total of arrivals is also included.
- **List of Expected Issues**: Retrieves a list of issues that are expected to arrive in a given time frame. Produces a report with scannable barcodes that can be used during check-in.

Binding
- **Bind Alert Report**: Produces a report indicating the volumes and issues that are ready for binding or discard, according to parameters set by the library.
Lesson 3: Items Reports Overview

This lesson describes items reports and categories available from the Services menu in the Cataloging and Circulation modules. Unit 2 provides examples of selected reports and descriptions of report parameters.

**Items**

- **General Retrieval Form**: Retrieves a list of items by a variety of criteria. Staff may choose from several different report formats and sort options. The General Retrieval Form is very flexible and will produce a variety of reports, including a Missing Items report, a Withdrawn Items list, and a New Items report.

- **Update Item Records**: Performs a batch update of item record fields, such as item status or item process status. Available upon request to the FLVC Help Desk.

- **Report of Missing Items**: Generates a list of all items with an item processing status of MI (Missing).

- **Inventory Definition**: Identifies the range of items that will be inventoried.

- **Print Items Labels**: Not used.

- **Shelf Reading Report**: Not used.

- **Shelf List**: Supports a manual collection inventory as well as other collection maintenance activities. If used for inventory, it should be run for the intended shelf range immediately prior to reading the shelves in order to lessen the likelihood that items have been checked out since the report was run.

- **Rebuild Call Number Index**: Used as needed by FLVC staff.

- **Inventory List**: Not used.
• **Inventory Marking**: Used to compare barcodes that have been scanned in, saved to a file, and uploaded to the LINCC server.

• **Inventory Summary**: Compiles a list of items that were not scanned, but that appear as on the shelf.

• **Inventory Report**: Not used.

• **Smart Barcode Export**: Not used.

• **Delete Item Records**: Restricted use. Performs batch deletion of items records. Does not delete associated holdings or bibliographic records.

**Lesson 4: Circulation Reports Overview**

This lesson describes circulation reports and categories available in the Circulation module. Reports under some of these categories are automatically system generated but may also be generated manually by library staff with different parameters. Unit 2 provides examples of selected reports and descriptions of report parameters.

**Reports**

- ** Patron List**: Generates a list of patrons according to criteria such as expiration date or blocks.

- **Requests Report**: Generates a report of hold or booking requests by various criteria, such as patron status, item status, date, and available or waiting in queue.

- **Outstanding Hold Requests Report**: Generates a report of unfilled hold requests by various criteria, such as patron status, item status, and date. System generated daily as D012.

- **Booking Risk Analysis Report**: Determines if upcoming booking requests are at risk of not being filled because the requested items are overdue, lost, claimed returned, or unavailable due to maintenance. The process can reallocate booking requests by checking for like items, and move the request from the item at risk to a like item that is available. Requests that cannot be reallocated are canceled and a delete letter is sent to the patron.
• **Hold Shelf Report:** Generates a list of items currently on the Hold Shelf that have expired. System generated weekly as D009, D010, and D011.

• **Loan report:** Generates a list of loans according to various criteria, such as due date, item status, and loan status (Active, Lost, Claimed Returned).

• **Report of Items in High Demand:** Generates a list of items that have at least the number of hold requests specified.

• **Report/Delete Expired Hold Requests:** Generates a list of unfilled hold requests that have expired and have been deleted. System generated daily as D004.

• **Report/Delete Expired Booking Requests:** Reports and/or deletes records whose booking_end_date is earlier than a date calculated as follows: today’s date minus the number of days defined in the "Number of days to include in the report" field.

• **Claimed Returned Items Report:** Generates a list of items that have been marked Claimed Returned. Can be retrieved by various criteria, such as date, patron status, and item status.

• **Report of In Transit Items:** Reports items that have been placed in transit to other campuses. Also lists items that have been loaned on ILL to other LINCC libraries.

**Cash Transactions**

<table>
<thead>
<tr>
<th>History</th>
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</thead>
<tbody>
<tr>
<td>Notices to Patrons</td>
</tr>
<tr>
<td>Maintenance</td>
</tr>
<tr>
<td>Renew</td>
</tr>
<tr>
<td>Requests</td>
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<tr>
<td>Reports</td>
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<tr>
<td>Patron Records</td>
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<tr>
<td>Cash Transactions</td>
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<tr>
<td>Statistics</td>
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<tr>
<td>General</td>
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<tr>
<td>Manage Database Tables</td>
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<tr>
<td>Items</td>
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<tr>
<td>Staff</td>
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<tr>
<td>Cash Transaction Report (cash-02)</td>
</tr>
<tr>
<td>Payments Received Report (cash-03)</td>
</tr>
<tr>
<td>Unpaid Transactions Letter / Update Transactions to &quot;Paid&quot; (cash-05)</td>
</tr>
<tr>
<td>Notices to Patrons Owing Money (cash-06)</td>
</tr>
<tr>
<td>Cash Export Report (cash-09)</td>
</tr>
<tr>
<td>Export Cash Transactions (cash-10)</td>
</tr>
<tr>
<td>Import Cash Transactions (cash-11)</td>
</tr>
</tbody>
</table>

• **Cash Transaction Report:** Not used.

• **Payments Received Report:** Generates a report of payments received by selected criteria, such as staff account, workstation, patron status, or date. System generated daily as C003. Staff may run this report manually if different criteria or time periods are needed.

• **Unpaid Transactions Letter / Update Transactions to “Paid”:** Reports or changes the payment status from Unpaid to Paid for all cash transactions that occur between the dates entered. Also prints a letter for each user, listing each transaction and the total amount of cash owed. A library might use this service, for example, if it transfers the responsibility for cash collection to another agency.
• **Notices to Patrons Owing Money:** Enables you to print out notices to patrons who have debts exceeding the amount defined in the form.

• **Cash Export Report:** Not currently used.

• **Export Cash Transactions:** Not currently used.

• **Import Cash Transactions:** Not currently used.

**Statistics**

<table>
<thead>
<tr>
<th>Statistics</th>
<th>General Circulation Statistics (cir-30)</th>
<th>Circulation Statistics by Activity Type (cir-31)</th>
</tr>
</thead>
<tbody>
<tr>
<td>History</td>
<td>General</td>
<td></td>
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<tr>
<td>Notices to Patrons</td>
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<tr>
<td>Maintenance</td>
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<tr>
<td>Renew / Recall Loans</td>
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<td>Requests</td>
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<td>Reports</td>
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<tr>
<td>Patron Records</td>
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<tr>
<td>Cash Transactions</td>
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</table>

• **General Circulation Statistics:** Generates a report that includes Loans, Renewals, Holds, and Returns, grouped by selected criteria such as patron status, item status, or material type. System-generated monthly statistical reports such as C007 are based on this report.

• **Circulation Statistics by Activity Type:** Generates a report by selected criteria, such as Loans, Renewals, Holds, and Returns. Some system-generated monthly statistical reports are based on this report.
Unit 2: Creating Staff-Generated Reports

Many reports in LINCC can be generated by library staff as needed. This unit describes how to run a variety of reports and includes detailed information about selecting report parameters. On-screen help is also available in the LINCC client for all reports and is updated as new report formats are released.

Lesson 1: Using the ALEPHADM Module for Technical Services

Before running a report, it is important to know what information is needed for retrieval and printing, and how it is stored in the database. Data must be entered on report submittal forms exactly as entered on the relevant record (e.g., item, order, patron), unless there is a drop-down menu on the retrieval form from which to make selections.

Data is usually retrieved by the code for the data element, not the name translation, so it is important to know what the codes and their corresponding name translations are. Some codes apply to all colleges and some codes are customizable by college. The codes used throughout LINCC can be found by looking at the record or by looking in the appropriate configuration table. For example, the table pc_tab_exp_field.eng contains the codes and name translations that appear on most drop-down menus in the LINCC client.

Task 1.1: Navigating the ALEPHADM Module

The ALEPHADM module contains files (also called tables or tabs) that configure the behavior of LINCC. Some settings in these tables apply to all LINCC colleges, some can be customized by college, and some can be customized by sublibrary (campus). Library policies are reflected in these tables (e.g., the loan period for items defined in the tab16 configuration table, and the lost item replacement charges defined in the tab34 configuration table). Knowing how to find the tables and codes that are relevant to reports will make running the reports a much easier process.

To retrieve a table in the ALEPHADM module:

1. Click the table icon in the lower right corner of the module window.
2. On the Tables menu, click Tables Navigator, or click the signpost icon.
3. Select the college name from the menu on the left, then select the Tab directory. The configuration tables will appear on the right.
4. Double-click the table containing the data needed.
5. When prompted to check out the table, click No. The table will appear as read-only and any changes will not be saved.

6. On the File menu, click View Source. The file will appear in Notepad. This contains the same information that is viewed in the ALEPHADM module, but is produced in a format that is easier to print. The top of the text file describes each column of data and what is allowed/not allowed. The table data is listed under the column numbers/exclamation marks, as shown below.

<table>
<thead>
<tr>
<th>1</th>
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</tbody>
</table>

| MJC15 | SU | L | Suppressed | Y | Y | N | N | N | N | Y | Y | O | O | N | A |
| MJC15 | OI | L | Order Initiated | N | N | N | N | N | N | N | N | N | O | O | N | A |
| MJC15 | OR | L | On Order | N | N | N | Y | N | N | N | N | O | O | N | A |
| MJC15 | IP | L | In process | N | N | N | Y | N | N | N | N | O | O | N | A |

**Task 1.2: Using Configuration Tables for Technical Services**

The following configuration tables may be useful to review for reports:

- **Pc_tab_exp_field.eng**: Includes codes and translations that are useful in a variety of reports, such as Item Processing Statuses and Patron Statuses. This information is useful when running a variety of reports, including the General Retrieval Form.
- **Tab15**: Defines the item statuses and various parameters connected to these statuses.
- **Tab25**: Defines Material Type codes and translations.
- **Tab40**: Defines Collection codes and translations.
- **Tab48**: Defines Invoice Payment statuses.

**Task 1.3: Understanding Bibliographic Information on Reports**

Bibliographic Information for reports typically comes from brief bibliographic records comprised of selected fields or from pre-defined formats in LINCC.

**Brief Bibliographic Records**

Bibliographic information on reports is not pulled from the bibliographic record in the FCC01 database each time a report is run. Instead, the reports pull the bibliographic information from a database table where various bibliographic fields have been defined and the data stored. The content of the fields for the brief bibliographic records is set by FLVC. The tab22 configuration table, which contains these definitions, can be viewed from the ALEPHADM module.

Examples of reports that include brief bibliographic information are those run using the Acquisitions General Retrieval Form and some fields on the Items General Retrieval Form. Typically, for a column heading labeled Title, Imprint, Author, etc., the corresponding bibliographic information comes from a brief record.
The following definitions are used for fields in the brief bibliographic records:

- **Year**: Date 1 from the 008 field; typically the publication date.

- **Call Number**: Call numbers are stored in the following order: 050, 090, 082. Local call numbers are not stored with the brief bibliographic records.

- **Author**: Any 100 field, all subfields. This definition includes personal names, corporate names, meeting names, or uniform title. Only the first 100 field found in the bibliographic record is stored for use with reports.

- **Title**: The 245 subfield a (title proper).

- **Imprint**: The 260 field, all subfields (place of publication, publisher, date, etc.).

- **ISBN/ISSN**: Data is stored from MARC fields in the following order: 020 subfield a, 022 subfield a.

- **USER-DEF-1**: Includes a concatenation of sublibrary code, collection code, and item process status.

- **USER-DEF-2**: Includes a concatenation of data from various fields such as author, title, place of publication, description, and system number.

- **USER-DEF-3**: The 035 subfield a; usually the OCLC number.

- **USER-DEF-4**: The LDR field, which contains codes representing such data as record status, type of record, and encoding level.

- **USER-DEF-5**: The 245 subfield b (subtitle).

- **USER-6**: The 520 field (notes).

- **USER-7**: The DEL field.

- **USER-8**: The 260 subfield c (date of publication).

- **USER-9**: The STA field, containing ACQ-CREATED and CIRC-CREATED information.

- **USER-10**: The 910 subfield a (eBook number).

- **USER-11**: A concatenation of subject headings found in MARC records for use running reports by subject.

- **USER-12**: The 008 position 23 (coding for an online resource or eBook).

- **USER-13**: TIFIL subfield a (special field containing titles; does not include leading articles in the title).

- **USER-14 and USER-15**: Not used.
Pre-Defined Bibliographic Formats

In cases where bibliographic information appears, such as on-order letters and claim letters, the data comes from pre-defined bibliographic formats. Typically, for a column heading or other indication of “Bib Info,” the bibliographic information follows one of these formats. FLVC has some control over the formats. Some examples are shown below.

- **Format 002**: Default; used when no other format is specified.
  
  Thompson, Sue Ellen. Holiday symbols / Sue Ellen Thompson, editor.[000784561]

- **Format 012**: Used in the Acquisitions Cancel Slip.
  

- **Format 111**: Used in Arrival Slips and Serial Claim Letters.
  
  Luttrell, Clifton B.
  The high cost of farm welfare / Clifton B. Luttrell.
  0932790712 (pbk.)

- **Format 400**: Used in Claim Report for Monographs.
  
  Kupferman, Joel. : Classic Asian philosophy : a guide to the essential texts / Joel J. Kupferman. [000928547]
Lesson 2: Using LINCC Report Submittal Forms

Each report is created by completing a submittal form to specify desired retrieval criteria and select an appropriate report format. Many submittal forms can be used for multiple purposes and/or reports. The criteria used to create specific reports are described in the corresponding lesson.

The following options appear on all reports:

- **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.

- **Submit**: Click Submit to start the report process. The report will be delivered to the Task Manager. If there is a problem with the report criteria, the report may find no data and finish in a few minutes. If the report successfully retrieves data, the process may take up to thirty minutes, depending on other system activity at the time.

- **View History**: Click View History to view and modify previously created reports. This can be used to refine a report without needing to reenter information in all fields. The first time a submittal form is used, the completed form is saved to the history, but if a submittal form is retrieved from the history, the Add to History check box is cleared. The Add to History check box must be selected to save changes to a previously run report.

- **Cancel**: Click Cancel to end the process.

- **Help**: Click Help to view online information regarding the report and retrieval parameters. It may be helpful to print the online help and use it in conjunction with this manual to complete the form and submit the report.

- **Add to History**: Select the Add to History check box to save a record of the report. The report history can be viewed by selecting History from the Services menu or by clicking View History on the report.

- **Run Time/At**: Not used. The report will be run as soon as it is submitted.

- **Print ID**: An optional ID, such as staff initials, may be entered. The ID will be appended as an extension to the report file name and may be useful to distinguish reports created by different individuals.

Once a report has been submitted, it will be placed in a queue and will be run as soon as system resources become available. The report will be delivered to the Task Manager and can be identified by the name entered in the Output File field on the report submittal form.
Lesson 3: Retrieving Reports from the Task Manager

The Task Manager is located in the Administration activity tab in each module. The Task Manager has four nodes: File List, Batch Log, Batch Queue, and Print Daemon. Print Daemon is not used. The File List enables staff to view or print reports and letters and the Batch log enables staff to monitor the progress of various jobs that have been run or are running.

To retrieve a report from the File List:

1. Click the Administration activity tab in any module.
2. Select the File List node.
3. Locate the desired report or letter in the lower pane.
4. Click Print to display a print preview, or double-click the file to transfer it to the upper pane and then click print.
If a report that has been submitted does not appear in the File List, contact the FLVC Help Desk. The submittal form’s parameters may be causing it to retrieve too large a set of records to enable it to finish in a reasonable amount of time. For example, the date range may be too large or a sublibrary may not have been selected causing the report to run for the entire college. FLVC can end any job that is taking too long to run. The submittal form can be reviewed, changes made to narrow the report, and the report can be resubmitted.

To use the Batch Log:

1. Click the Administration activity tab in any module.
2. Select the Batch Log node.
3. Locate the report that was run by its process name. In the Services menu, this is the name in parentheses after the report name (e.g., acq-12, ret-adm-01, cir-04).
To use the Service Form button:

1. Select a job in the upper pane.
2. Click **Service Form** to retrieve the submittal form corresponding to the job selected in the upper pane.
3. Review the form and make any necessary changes. Click **Submit**.
4. Select the **File List** node and click **Refresh** in the upper pane. The new report should be listed in the lower pane.

If the report does not appear immediately, it may still be running. Click Refresh again until the file appears in the lower pane of the File List.

To use the View Printouts feature:

1. From the upper pane of the **Batch Log**, select the job for which a printout is desired.
2. Click **View Printouts**. The focus will shift to the File List. The only file displayed in the lower pane will be that corresponding to the result of the selected job.
3. Click **Print** to display a print preview, or double click the file to transfer it to the upper pane and then click print.
4. Click **Clear Filter** in the File List's upper pane to remove the filter. All files will be displayed in the lower pane.
Lesson 4: Creating Acquisitions Reports

This lesson provides descriptions and examples of commonly used acquisitions reports generated from the Acquisitions/Serials module.

To run Acquisitions reports:

1. Open the Acquisitions/Serials module.
2. On the Services menu, point to a report category, and then click the desired report.
3. A report submittal form will appear. Complete the fields to define report parameters (these parameters are described in the following tasks). Fields marked with an asterisk (*) on the form are mandatory.

   Note: Reports in the Retrieve and Print Acquisitions Records menu must be submitted in conjunction with the Print Acquisitions Records service.

4. Click Submit to run the report.
5. Retrieve the report in the Task Manager.

Overview of the Acquisitions General Retrieval Form

The Acquisitions/Serials module’s General Retrieval Form (GRF) is a versatile service that can be used to create a number of different reports. This service retrieves order records matching a number of different filters chosen on the submittal form. There are up to seven filters – five choices can be made for each filter. Information must be entered on the submittal form exactly as it appears on the order forms, whether it is a code from one of the drop-down menus, or if it is typed directly in the order forms.

The retrieval fields fall into five categories of data, but can be used in any combination. Information is retrieved by entering codes in the submittal form. Some codes are customizable by college and can be found in one of the configuration tables identified at the beginning of this unit. Additionally, the on-screen help available in the LINCC client contains examples of codes that are common to all the colleges.

Retrieval fields and categories within each field are listed below. Not all of the retrieval fields can be printed on the report.

- **Order Information:** ADM number, Order Number, Order Number 2, Order Number 3, Order Group, Date Order Opened, Order Log Update Date, Order Date, Order Type, Order Status, Order Status Change Date, Invoice Status, Material Type, Sublibrary, Order Unit, Method of Acquisition, Initiator ID, Initiator Name, Action, Subscription Start Date, Subscription End Date, Subscription Renewal Date, Budget Cycle Period, and Maximum Arrival Days.

- **Vendor and Shipment Information:** Vendor Code, Vendor Reference, Order Delivery Type, Material Delivery Type, Rush Order, Estimated Date of Arrival, Original Estimated Date of Arrival, Shipment Date, Arrival Date, and Arrival Status.
• **Invoice, Quantity, and Price Information:** Invoice Type, Invoice Number, Invoice Status, Number of Units Ordered, Unit Price, Quantity Note, Invoice Date, Local Price, Invoice Currency, List Price, Final Price, Line Item Invoice Total Amount, Payment Status, Payment Date, Check Number, and Line Item Debit/Credit.

• **Budget Information:** Budget Code, Original Encumbrance, Transaction Active Amount, Transaction Local Amount, Transaction Type, Transaction Credit/Debit, Budget Group 1, Budget Group 2, Budget Group 3, Budget Group 4, and Budget Group 5.

• **Claim Information:** Date Claim Sent and Vendor Reply Date.

Codes entered within one retrieval area are joined by a Boolean “OR” statement. Only five entries can be joined by “OR.” For example, if retrieving by Order Status, listing up to five statuses would retrieve each status listed.

Codes entered between retrieval fields are joined by a Boolean “AND” statement. For example, if retrieving by Order Status and Vendor Code, it would be possible to retrieve “(LC or VC) AND B&T” to retrieve all orders either cancelled by the library or cancelled by the vendor where the vendor code is B&T.

### Overview of the Print Acquisitions Records Service
The Print Acquisitions Records service takes the data retrieved by the Acquisitions GRF and displays it in table format using the column headings selected in the Report Fields menu. Each column heading represents data on the order records (e.g., Sublibrary, Order Type, Order Group) or data that is associated with the order records through links to other records (e.g., Title, Author, Call No.). Not all retrieval fields are available as printable fields. Column headings are listed below.

<table>
<thead>
<tr>
<th>ADM doc. No</th>
<th>Order Date</th>
<th>Total Invoice Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sublibrary</td>
<td>Quantity Note</td>
<td>Invoice Note</td>
</tr>
<tr>
<td>Date Order Opened</td>
<td>Unit Price Note</td>
<td>Invoice Payment Status</td>
</tr>
<tr>
<td>Open date</td>
<td>Estimated List Price</td>
<td>Claim Date</td>
</tr>
<tr>
<td>Order logger date</td>
<td>Order Group</td>
<td>Vendor Reply Date</td>
</tr>
<tr>
<td>Order type</td>
<td>ISBN</td>
<td>Vendor Reply</td>
</tr>
<tr>
<td>Number of Units ordered</td>
<td>Auto Claim Order</td>
<td>Invoice Date</td>
</tr>
<tr>
<td>Library Note</td>
<td>Order’s Local Price</td>
<td>Budget Group 1</td>
</tr>
<tr>
<td>Order Number</td>
<td>Terms Sign</td>
<td>Budget Group 2</td>
</tr>
<tr>
<td>----------------</td>
<td>------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Order Number 2</td>
<td>Terms Percent</td>
<td>Budget Group 3</td>
</tr>
<tr>
<td>Order Number 3</td>
<td>Order’s Final Price</td>
<td>Budget Group 4</td>
</tr>
<tr>
<td>Material Type</td>
<td>Estimated Price Currency</td>
<td>Budget Group 5</td>
</tr>
<tr>
<td>Original Order Expected Arrival Date</td>
<td>Order Status</td>
<td>Author</td>
</tr>
<tr>
<td></td>
<td>Order Status Change Date</td>
<td>Call-No</td>
</tr>
<tr>
<td>Order Delivery Type</td>
<td>Acquisition Method</td>
<td>Imprint</td>
</tr>
<tr>
<td>Rush</td>
<td>Subscription Start Date</td>
<td>ISSN ISBN</td>
</tr>
<tr>
<td>Vendor Code</td>
<td>Subscription End Date</td>
<td>Invoice Number</td>
</tr>
<tr>
<td>Vendor Note</td>
<td>Subscription Renewal Date</td>
<td>Invoice Status</td>
</tr>
<tr>
<td>Total of Units Arrived</td>
<td>Budget Code</td>
<td>Initiator ID</td>
</tr>
<tr>
<td>Arrival Note</td>
<td>Arrival Status</td>
<td>Initiator Name</td>
</tr>
</tbody>
</table>

The title on reports using the Print Acquisitions Records service will always be “Order Info Report.” Therefore, it is generally a good idea to include at least one report field that indicates what the report is about, such as Arrival Status, Invoice Status, or Order Status, or to copy the report into word processing or spreadsheet software to add a unique title and make further adjustments.
Task 4.1: Creating a New Acquisitions Report for Specific Formats or Collections

Report Used: Acquisitions GRF

Creating a report of new acquisitions for specific formats or collections can be accomplished in several ways, depending on whether the college uses the Acquisitions/Serials module, and if so, whether item records are created at the time an order record is created. If item records are created at the same time, their open date could be months before the item is received and available.

Although the items automatically receive item process statuses of OI (Order Initiated), OR (On Order), and IP (In Process), it is impossible to run an Items GRF for instances where the item process status changed to blank. Similarly, the update date of the item record is unreliable since this date will change regardless of the update. It could be that the item process status changed from IP to blank, or it could be that another change was made to the item record.

Two reports can be used to determine new acquisitions, depending on how the college uses LINCC. The Acquisitions GRF can be used for colleges using acquisitions and creating items. The Items GRF can be used for colleges not using acquisitions, or using acquisitions but not creating items. The items report created with the Items GRF can be run from the LINCC client or retrieved monthly from the LRS as I007.

Creating a New Acquisitions report for specific formats using the Acquisitions GRF:

Step 1: Complete the Acquisitions GRF. This step determines the order records that will be retrieved.

To complete Step 1 of this task:

1. On the Services menu, point to Retrieve and Print Acquisitions Records.
2. Select General Retrieval Form; the submittal form will appear.
3. Complete the following fields:

- **Input File**: Leave blank.
- **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
- **Use Hierarchy Budget**: Select Yes.
- **Retrieve By**: Select a retrieval field and enter up to five filters in the spaces provided. Up to seven retrieval fields may be used.
  - For this report, select Order’s Arrival Status and enter C (for Complete). Select Material Type and enter the appropriate code for the material type (e.g., M, V, A). Since these codes are customizable by college, the codes entered may differ. If the report is desired for a single sublibrary, select Sublibrary as the next filter and enter the appropriate code in the space provided.

4. When finished, click **Submit** and complete **Step 2**.
Unit 2  LINCC Reports

Step 2: Run the Print Acquisitions Records service. This step defines column headings that will appear in the printed report, such as title, order number, and number of units ordered.

To complete Step 2 of this task:

1. On the Services menu, point to Retrieve and Print Acquisitions Records.
2. Click Print Acquisitions Records; a submittal form will appear.

3. Complete the following fields:

   - **Input File**: Enter the name of the Output File used in Step 1. If you previously copied the file name using CTRL+C, use CTRL+V to paste the name in this field.

   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. This is the file/report name that will appear in the Task Manager.

   - **Report Format**: Choose one of two report formats.
     - **Order-info-report-00**: Lists orders in ADM record number order.
     - **Order-info-report-01**: Lists orders sorted first by Sublibrary and then alphabetically by Title, if these fields are selected. It will also provide a total dollar amount for all orders on the list when Estimated List Price, Order’s Final Price, Order’s Local Price, or Total Invoice Amount are selected.

   - **Report Fields**: Select fields from the list to be displayed as column headings on the report.

4. When finished, click Submit.
An example of the report is shown below. These orders are completely arrived. Since Material Type was selected in Step 2, the code for this data is displayed on the report.

<table>
<thead>
<tr>
<th>Subtitle</th>
<th>Order Number</th>
<th>Title</th>
<th>Author</th>
<th>Call No</th>
<th>Imprint</th>
<th>Material Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCUCV</td>
<td>5105</td>
<td>America learns to dance.</td>
<td>Marks, Joseph E.</td>
<td></td>
<td>New York: Dance Horizons, c.1957</td>
<td>Y</td>
</tr>
<tr>
<td>NCUCV</td>
<td>5119</td>
<td>Billie Holiday</td>
<td>Ingham, Chris</td>
<td>ML.C22.M58</td>
<td>London : Unmeasured, 1938</td>
<td>M</td>
</tr>
<tr>
<td>NCUCV</td>
<td>5120</td>
<td>Children and others</td>
<td>Czezowski, Julian 1963</td>
<td>P23505.096.65</td>
<td>New York : Harcourt, Brace &amp; World</td>
<td>M</td>
</tr>
<tr>
<td>NCUCV</td>
<td>5121</td>
<td>Chinese New Year!</td>
<td>Walsh, Helen</td>
<td>Juvenile</td>
<td>Vero Beach, Fla. : Random Pub, LLC, 1993</td>
<td>M</td>
</tr>
</tbody>
</table>

**Task 4.2: Running a Report Identifying Department or Requestor Purchases**

**Report Used: Acquisitions GRF**

If the Initiator ID field on the order form is used, the Acquisitions GRF can be used to run a report by initiator. This report is also available on the LRS as A025 (described in Unit 4).

**Step 1: Complete the Acquisitions GRF.** This step determines the order records that will be retrieved.

**To complete Step 1 of this task:**

1. On the Services menu, point to Retrieve and Print Acquisitions Records.
2. Select **General Retrieval Form**; the submittal form will appear.

3. Complete the following fields:
   - **Input File**: Leave blank.
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Use Hierarchy Budget**: Select Yes.
- **Retrieve By:** Retrieving by Initiator ID is preferable, but either Initiator name or Initiator ID can be used. The data must be entered in the space provided exactly as it appears in LINCC. Certain characters (`?` `{' ` `^` `>` `,`) are not allowed.

4. When finished, click **Submit** and complete **Step 2**.

**Step 2: Run the Print Acquisitions Records service.** This step defines column headings that will be displayed in the printed report, such as title, order number, and number of units ordered.

**To complete Step 2 of this task:**

1. On the **Services** menu, point to **Retrieve and Print Acquisitions Records**.
2. Click **Print Acquisitions Records**; the submittal form will appear.
3. Complete the following fields:
   - **Input File:** Enter the name of the Output File used in Step 1. If you previously copied the name using CTRL+C, use CTRL+V to paste the name in this field.
   - **Output File:** Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. This is the file/report name that will appear in the Task Manager.
   - **Report Format:** Choose one of two report formats.
     - **Order-info-report-00:** Lists orders in ADM record number order.
     - **Order-info-report-01:** Lists orders sorted first by Sublibrary and then alphabetically by Title, if these fields are selected. It will also provide a total dollar amount for all orders on the list when Estimated List Price, Order’s Final Price, Order’s Local Price, or Total Invoice Amount are selected.
   - **Report Fields:** Select fields to be displayed as column headings on the report. LINCC cannot be configured to print the Initiator ID or the name on this report.
4. When finished, click **Submit**.
An example of the report is shown below.

<table>
<thead>
<tr>
<th>Sublibrary</th>
<th>Order Number</th>
<th>Title</th>
<th>Author</th>
<th>Call-No</th>
<th>Imprint</th>
</tr>
</thead>
<tbody>
<tr>
<td>MUCBR</td>
<td>5105</td>
<td>America learns to dance :</td>
<td>Marks, Joseph E.</td>
<td>NY: New York. Dance Horizons, c1997</td>
<td></td>
</tr>
<tr>
<td>MUCBR</td>
<td>5102</td>
<td>A girl's guide to cruising/Cruising guide to Florida's Yacht Coast</td>
<td>Landis, Tom</td>
<td>St. Petersburg, FL: Great Outdoors Pub. Co., c1981</td>
<td></td>
</tr>
<tr>
<td>MUCVE</td>
<td>5212</td>
<td>100 singing games and dances for elementary schools</td>
<td>Chockey, Lula</td>
<td>Englewood Cliffs, NJ: Prentice-Hall, c1957</td>
<td></td>
</tr>
<tr>
<td>MUCVE</td>
<td>5513</td>
<td>African-American poets</td>
<td>Phillip, Jan</td>
<td>Philadelphia: Chelsea House Publishers, c2003</td>
<td></td>
</tr>
<tr>
<td>MUCVE</td>
<td>5000</td>
<td>-- and I thought I knew how to communicate!</td>
<td>Olkens, Lyman G.</td>
<td>Minneapolis, MN: Educational Media, c1985</td>
<td></td>
</tr>
</tbody>
</table>

**Task 4.3: Determining the Balance on POs, Including Blanket POs**

**Reports Used: Budget Summary, Acquisitions GRF**

If purchase orders (POs) are entered in LINCC as Budgets, the Budget Summary report can be used to determine the balance. When using the Budget Summary report, it may also be necessary to run additional reports to clarify information contained in it, such as which invoices are not yet paid and which orders are still outstanding.

If POs, including blanket POs, are entered in LINCC using Order Number 2 or 3 fields rather than Budgets, the Acquisitions GRF can be used.

**Using the Budget Summary Report to Determine the Balance on POs if the PO is Entered as a Single Budget**

Budgets can be created in the Acquisitions/Serials module such that they reflect a blanket PO. The Budget Summary report summarizes the budgets that meet selected criteria. The report includes the allocations, transfers, encumbrances, invoices not paid, payments, estimated and actual balance, and the maximum over-commitments and over-expenditures set for the budget.
To complete this task:

1. On the Services menu, point to Budget Management, and then click Budget Summary.

2. Complete the following fields:

   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. This is the file/report name that will appear in the Task Manager.

   - **Sublibrary**: Choose the sublibrary or sublibraries to include in the report. Select All to include orders for all sublibraries.

   - **Budget Code**: Enter or select the budget code of a specific budget, or use a wildcard to identify all budgets that begin with a particular string. For example, enter MATH* for all budgets that begin with MATH. The wildcard may be used only at the end of the budget string.

     Leave this field blank to include all budgets on the report. If this field is used, the system will ignore any entries made in the Budget Description fields, except for Balance by Hierarchy and Expand Budgets in Hierarchy fields.

   - **Balance by Hierarchy**: Select Yes. Or, select No if there is no parent budget.

   - **Expand Budgets in Hierarchy**: Select No if parent-child budgets were not used.

   - **Budget Type**: Select a budget type from the drop-down menu. Select All to include all budget types.

   - **Budget Year**: This is the year that is part of the annual budget code that appears on the Budget Information form (e.g., BIOLOGY-2003). Leave this field blank to include all budgets (annual and non-annual). To include only non-annual budgets, enter ZZZZ.

   - **Budget Department**: Select a department from the drop-down menu if the field has been customized. Leave blank if this field is not used.

   - **Budget Group**: Select a budget group from the drop-down menu if this field has been customized. Leave blank if this field is not used.

   - **Budget Status**: Select Active, Non-Active, or All from the drop-down menu.

   - **Report Format**: Select the desired report format.

3. When finished, click Submit.
An example of the report for a single budget representing a blanket PO is shown below.

<table>
<thead>
<tr>
<th>Budget Code:</th>
<th>FLVC2-2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund:</td>
<td>FLVC Budget 2-2014</td>
</tr>
<tr>
<td>Status:</td>
<td>Active</td>
</tr>
<tr>
<td>Valid Date From:</td>
<td>07/01/2013</td>
</tr>
<tr>
<td>Valid Date To:</td>
<td>06/30/2014</td>
</tr>
<tr>
<td>Initial Allocation:</td>
<td>0.00</td>
</tr>
<tr>
<td>Allocation:</td>
<td>0.00</td>
</tr>
<tr>
<td>Carried Over:</td>
<td>0.00</td>
</tr>
<tr>
<td>Transferred:</td>
<td>0.00</td>
</tr>
<tr>
<td>Encumbrances:</td>
<td>0.00</td>
</tr>
<tr>
<td>Invoices (Not yet Paid):</td>
<td>0.00</td>
</tr>
<tr>
<td>Invoices (Paid):</td>
<td>0.00</td>
</tr>
<tr>
<td>Actual Balance:</td>
<td>0.00</td>
</tr>
<tr>
<td>Free Balance:</td>
<td>0.00</td>
</tr>
<tr>
<td>Max Over Expenditure:</td>
<td>0.00</td>
</tr>
<tr>
<td>Max Over Commitment:</td>
<td>0.00</td>
</tr>
<tr>
<td>Sublibraries:</td>
<td>ALL</td>
</tr>
<tr>
<td>Includes Budgets:</td>
<td>FLVC2-2014</td>
</tr>
</tbody>
</table>

Total Budgets: 1
Initial Allocation: 0.00
Allocation: 0.00
Carried Over: 0.00

Using the Budget Summary Report to Determine the Balance on POs if the PO is Entered as Parent-Child Budgets

Budgets can be created in the Acquisitions/Serials module such that a blanket PO covering purchases in several areas or for different purposes can be linked using a parent-child relationship.

The Budget Summary report summarizes the budgets that meet selected criteria. The report reflects the budget hierarchical structure by selecting the Balance by Hierarchy and Expand Budgets in Hierarchy fields.
To complete this task:

1. On the Services menu, point to Budget Management, and then click Budget Summary.

2. Complete the following fields:
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. This is the file/report name that will appear in the Task Manager.
   - **Sublibrary**: Select the sublibrary or sublibraries to include in the report. Select All to include orders of all sublibraries.
   - **Budget Code**: Enter or select the budget code of a specific budget, or use a wildcard to identify all budgets that begin with a particular string. For example, enter MATH* for all budgets that begin with MATH. The wildcard may only be used at the end of the budget string.
     Leave this field blank to include all budgets on the report. If this field is used, the system will ignore any entries made in the Budget description fields, except for Balance by Hierarchy and Expand Budgets in Hierarchy fields.
   - **Balance by Hierarchy**: Select Yes so that all budget sums are calculated on the parent budget and all its descendants. A list of all descendants is displayed at the end of the report.
   - **Expand Budgets in Hierarchy**: Select Yes so that all descendants are displayed after the parent budget. The descendants' budgets are displayed with leading plus signs (+).
   - **Budget Type**: Select a budget type from the drop-down menu. Select All to include all budget types.
   - **Budget Year**: This is the year that is part of the annual budget code which appears on the Budget Information form (e.g., BIOLOGY-2003). Leave this field blank to include all budgets (annual and non-annual). To include only non-annual budgets, enter ZZZZ.
   - **Budget Department**: Select a budget department if this field has been customized. Leave blank if this field is not used.
   - **Budget Group**: Select a budget group if this field has been customized. Leave blank if this field is not used.
   - **Budget Status**: Select Active, Non-Active, or All from the drop-down menu.
   - **Report Format**: Choose from a list of formats. If Yes is selected, all descendants are displayed after the parent budgets. The descendants' budgets are displayed with leading plus signs (hierarchy is based on depth of indentation). If hierarchical budgets are not used, select No.

3. When finished, click Submit.
An example of the report is shown below. The blanket PO is spread across multiple budgets.

<table>
<thead>
<tr>
<th>Budget Code</th>
<th>Fund</th>
<th>Initial Allocation</th>
<th>Allocation</th>
<th>Carryover</th>
<th>Transferred</th>
<th>Encumbrances</th>
<th>Invoices (Not yet Paid)</th>
<th>Invoices (Paid)</th>
<th>Actual Balance</th>
<th>Free Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLVC-</td>
<td>Budget 1</td>
<td>0.00</td>
<td>1000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>(552.76)</td>
<td>0.00</td>
<td>0.00</td>
<td>1000.00</td>
<td>447.22</td>
</tr>
<tr>
<td>PARENT-</td>
<td>Budget 2</td>
<td>0.00</td>
<td>500.00</td>
<td>0.00</td>
<td>0.00</td>
<td>(495.44)</td>
<td>0.00</td>
<td>0.00</td>
<td>500.00</td>
<td>4.56</td>
</tr>
<tr>
<td>2014</td>
<td>Budget 3</td>
<td>0.00</td>
<td>500.00</td>
<td>0.00</td>
<td>0.00</td>
<td>(57.34)</td>
<td>0.00</td>
<td>0.00</td>
<td>500.00</td>
<td>442.05</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Budgets:</td>
<td>1</td>
<td>Additional Expanded Budgets:</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Allocation:</td>
<td>0.00</td>
<td>Allocation:</td>
<td>1000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carry Over:</td>
<td>0.00</td>
<td>Transferred:</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encumbrances:</td>
<td>(552.76)</td>
<td>Invoices (Not yet Paid):</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoices (Paid):</td>
<td>0.00</td>
<td>Actual Balance:</td>
<td>1000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free Balance:</td>
<td>447.22</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In this type of report, the line for the parent budget reflects the activity of all the child budgets and can be used to assess the amount remaining in the blanket PO. Each subordinate (child) budget is listed in order by budget code. The report will provide summary information about the budget, including initial allocations, allocations, carryovers, transfers, encumbrances, invoices, payments, the actual balance, and free balance. If object codes have been used, this information will be summarized.
Using the Acquisitions GRF to Determine the Balance on POs if the PO is Entered as Order Number 2

Blanket PO numbers can be entered in LINCC using Order Number 2 or 3 rather than being entered as budgets. If so, the Acquisitions GRF can be used to retrieve orders sent and received during the year.

Step 1: Complete the General Retrieval Form. This step determines the order records that will be retrieved.

To complete Step 1 of this task:
1. On the Services menu, point to Retrieve and Print Acquisitions Records.
2. Click General Retrieval Form; the submittal form will appear.
3. Complete the following fields:
   - **Input File**: Leave blank.
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. This is the file/report name that will appear in the Task Manager.
   - **Retrieve By**: Select Order Number 2 and enter the PO number in the space provided exactly as it appears on the order records. The Sublibrary and Order Date fields are also useful retrieval fields. If entering an Order Date, enter it as a range, with the beginning date on line 1 and the ending date on line 2. Enter the format as YYYYMMDD.

4. When finished, click **Submit** and complete **Step 2**.

**Step 2: Run the Print Acquisitions Records service.** This step defines column headings that will be displayed in the printed report.

To complete Step 2 of this task:

1. On the Services menu, point to Retrieve and Print Acquisitions Records, and then click **Print Acquisitions Records**.

2. Complete the appropriate fields. Useful column headings include Sublibrary, Order Number, Date Order Opened, Order Date, Order Status, Final Price, Order’s Invoice Status, Total Invoice Amount, and Invoice Payment Status.

3. When finished, click **Submit**.
An example of the report is shown below. The column totals for Final Price and Total Invoice Amount are shown on the report.

<table>
<thead>
<tr>
<th>Sublibrary</th>
<th>Order Number 2</th>
<th>Order Number 3</th>
<th>Title</th>
<th>Order Date</th>
<th>Order Status</th>
<th>Budget Code</th>
<th>Final Price</th>
<th>Order’s Invoice Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>MUCBR</td>
<td>PO123</td>
<td></td>
<td>Journey to Justice</td>
<td>07/09/2014</td>
<td>SV</td>
<td>FLVC2-2014</td>
<td>10.44</td>
<td>None</td>
</tr>
<tr>
<td>MUCBR</td>
<td>PO123</td>
<td></td>
<td>Stock cars</td>
<td>07/09/2014</td>
<td>SV</td>
<td>FLVC3-2014</td>
<td>14.95</td>
<td>None</td>
</tr>
<tr>
<td>MUCBR</td>
<td>PO123</td>
<td></td>
<td>Who’s afraid of</td>
<td>07/09/2014</td>
<td>SV</td>
<td>FLVC3-2014</td>
<td>42.39</td>
<td>None</td>
</tr>
</tbody>
</table>

**Task 4.4: Determining Order Receipt/Non-Receipt**

**Report Used: Claim Report for Monograph Orders**

The Claim Report and Letters for Monograph Orders service provides a report of monographs that have not yet arrived. The service may be run so that only the report is produced and the database is not updated. The Batch Claiming feature does not have to be used to obtain a claim report.

The report retrieves order records that have a claim date equal to or earlier than the date on which the report is run. LINCC calculates the claim date by adding the date on which the order was sent plus the delay period specified in the vendor record. If no delay period is specified, the claim date is the same day as the date the order status became SV (Sent to Vendor).

The report produces two printouts: one printout will list all orders for which the Batch Claiming check box in the Order Form was selected, while the other printout will list all orders for which the Batch Claiming check box was not selected (identified in the Task Manager with a .x extension after the output filename).
To complete this task:

1. On the Services menu, point to Orders and Claims, and then click **Claim Report and Letters for Monograph Orders**.

2. Complete the following fields:
   - **Report Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Print Letters**: Select No.
   - **Claim Letters Output Type**: Choose either “Separate Claim Letters to Vendor” or “List of Claims per Vendor”. The first option will have one letter or email per order. The second option will include all titles sent to a particular vendor.
   - **Letter Output File**: Leave blank.
   - **Update Database**: Select No.
   - **Vendor Code**: Enter a vendor code to see orders that have not arrived for a specific vendor. Leave this field blank to retrieve orders that have not been received from any vendor.
   - **Number of Claims Already Sent**: Leave blank.
- **Number of Days Until Next Claim**: Leave blank.
- **Letter Format**: Select Standard.
- **Report Format**: Use the default setting.

3. When finished, click **Submit**.

An example of the report is shown below. These orders have not been received as of the running of the report. As indicated by the Auto Claim column, the Batch Claiming option was selected for the orders listed in this report.

![Claim Report for Monograph Orders](image1)

A second example of the report is shown below. These orders have not been received as of the running of the report. As indicated by the Auto Claim column, the Batch Claiming option was *not* selected for orders listed in this report.

![Claim Report for Monograph Orders](image2)
Task 4.5: Determining Open/Closed Orders per Budget

Report Used: Sent to Vendor Orders per Budget

The Sent to Vendor Orders per Budget service will list all orders with an order status of SV (Sent to Vendor) for the selected budget. Before running this report to see the outstanding orders, run the Invoice Report to create a list of invoices that are marked Not Ready to be Paid so that those invoices can be marked Paid in LINCC. Marking invoices Paid will cause order statuses to change to CLS (Closed). The Invoice Report is described in Task 4.7.
To complete this task:

1. On the Services menu, point to Budget Management, and then click List of Orders per Budget.

2. Complete the following fields:

   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. Select and copy this name by using the CTRL+C on the keyboard. It will be used in the Print Acquisitions Records service to produce the report.

   - **Budget Code**: Click the list icon to select the budget from a list, or use a wildcard to identify all budgets that begin with a particular string (e.g., 01*). The wildcard may be entered only at the end of the string. If left blank, all budgets will be retrieved. If a budget or budget string is specified, no other fields should be completed.

   - **Report Format**: Select SV Orders per Budget 01. This format will list only orders with an order status of SV that are linked to the budget selected. Format 00 will list all orders of all statuses linked to the selected budget.

3. When finished, click Submit.

An example of the report is shown below. These orders for budget CCLA1 are marked Sent to Vendor as of the date the report was run.

<table>
<thead>
<tr>
<th>Budget</th>
<th>Order Number</th>
<th>Title</th>
<th>Order Date</th>
<th>Final Price</th>
<th>Order Status</th>
<th>Vendor Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCLA1-2007</td>
<td>0148</td>
<td>Determining the future of gerontological nursing education.</td>
<td>04/25/2007</td>
<td>56.33</td>
<td>Sent to vendor</td>
<td>UF PRESS</td>
</tr>
<tr>
<td>CCLA1-2007</td>
<td>0150</td>
<td>Geriatric mental health training series 1</td>
<td>04/25/2007</td>
<td>21.76</td>
<td>Sent to vendor</td>
<td>UF PRESS</td>
</tr>
<tr>
<td>CCLA1-2007</td>
<td>0151</td>
<td>Gerontological nursing</td>
<td>04/25/2007</td>
<td>22.00</td>
<td>Sent to vendor</td>
<td>UF PRESS</td>
</tr>
<tr>
<td>CCLA1-2007</td>
<td>0152</td>
<td>Gerontological nursing needs</td>
<td>04/25/2007</td>
<td>32.99</td>
<td>Sent to vendor</td>
<td>UF PRESS</td>
</tr>
</tbody>
</table>
Task 4.6: Determining Whether Orders Have Been Invoiced

Report Used: No Invoice Report

The No Invoice report retrieves Acquisitions orders for which an invoice has either not been received, or has been partially received. To produce a report from this file, use the Print Acquisitions Records service.

Step 1: Run the No Invoice report

To complete Step 1 of this task:

1. On the Services menu, point to Retrieve and Print Acquisitions Records.
2. Click No Invoice; the submittal form will appear.

3. Complete the following fields:
   - **Input File**: Leave blank.
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. Select and copy this name by using the CTRL+C on the keyboard. It will be used in the Print Acquisitions Records service to produce the report.
   - **Order Date (From)**: Enter the dates between which the orders were sent to the vendor and their order status changed to SV (Sent to Vendor). Select the range using the calendar feature or by typing directly in the date field.

4. When finished, click Submit and complete Step 2.

Step 2: Complete the Print Acquisitions Records service

To complete Step 2 of this task:

1. On the Services menu, point to Retrieve and Print Acquisitions Records, and then click Print Acquisitions Records.
2. Select the report fields that should appear on the printed report. Use the Output File name from the No Invoice report submittal form as the Input File name in the Print Acquisitions Records form.
3. Complete the fields described below:

- **Input File**: Use CTRL+V to paste the Output File name used in the No Invoice report submittal form.

- **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.

- **Report Format**: Select one of two report formats:
  - Order-info-report-00: Lists orders in ADM record number order.
  - Order-info-report-01: Lists orders sorted first by Sublibrary and then alphabetically by Title, if these fields are selected. The title sort ignores initial “a,” “an,” and “the,” if present in the title. The report will also provide a total dollar amount for all orders on the list when Estimated List Price, Order’s Final Price, Order’s Local Price, or Total Invoice Amount is selected.

- **Report Fields**: Select the desired report fields, such as Sublibrary, Order Number, Title, Order Date, Budget Code, Number of Units Ordered, Final Price, and Vendor Code.

4. When finished, click Submit.

An example of the report is shown below. The orders listed have not been recorded on an invoice.
Task 4.7: Determining Which Invoices Have Not Been Paid

Report Used: Invoice Report

The Invoice Report can be used to perform global actions on a group of invoices or it can be used to run a report. If used to perform global actions, it can assign approval numbers to all general invoices retrieved by the service, or it can change the payment status of a retrieved group of general invoices. If used to run a report, it produces two reports of invoices in a particular status: the Invoice Report and the Invoice Report Summary. The steps necessary to produce a report without changing data are outlined in this section.

The Invoice Report can be run either per invoice or per group of invoices organized by vendor and currency, depending on selections made on the report submittal form. The following parameters will produce a report per group of invoices organized by vendor.
To complete this task:

1. On the Services menu, point to Other, and then click Invoice Report.
2. Complete the following fields:
   - **Report File:** Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. This must be a different file name than that entered for the Summary Report File field.
   - **Summary Report File:** Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Report Per Single Invoice:** Select No to produce a report with invoices grouped by vendor and currency. When selecting No, use the Standard Format in the Report Format drop-down list.
   - **Update Database:** Select No.
   - **Retrieve Using Approval Number:** Select No.
   - **Approval Number:** Leave blank.
   - **Retrieve by Approval Department:** Leave blank.
   - **Retrieve by Invoice Type:** Select an invoice type from the drop-down menu or select All to include all types.
   - **Retrieve by Payment Status:** Select Not Ready to be Paid.
   - **Change Payment Status To:** Select Not Ready to be Paid.
   - **Report Format:** Select Standard if you have selected No for the Report per Single Invoice field; select Per Invoice if you have selected Yes.
3. When finished, click **Submit**.

---

**Note:** Be sure the Retrieve by Payment Status and Change Payment Status To fields contain the same information to avoid accidentally changing the payment status of the invoices.
An example of section 1 of the Invoice Report is shown below. These invoices for Baker & Taylor are marked “Not Ready to be Paid” in LINCC. Additional printouts are available for other vendors. Section 1 lists all general invoices that are not ready to be paid, indicating whether the invoice is balanced and providing the invoice number, invoice date, and total amount.

<table>
<thead>
<tr>
<th>Vendor Code</th>
<th>Invoice Report</th>
<th>MUC50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>125</td>
<td>12.00</td>
</tr>
<tr>
<td>Yes</td>
<td>25121</td>
<td>25.00</td>
</tr>
<tr>
<td>Yes</td>
<td>51119</td>
<td>25.00</td>
</tr>
<tr>
<td>Yes</td>
<td>5131</td>
<td>59.00</td>
</tr>
<tr>
<td>Yes</td>
<td>5140</td>
<td>25.00</td>
</tr>
<tr>
<td>Yes</td>
<td>6148</td>
<td>25.00</td>
</tr>
</tbody>
</table>

Total sum due to vendor:
- Total Sum: +182.00
- Total Sum Net: +182.00

An example of sections 2 and 3 of the Invoice Report is shown below. Section 2 identifies the budgets used per vendor and provides a breakout by object code, if applicable. Section 3 identifies the budgets used per invoice and provides a breakout by object code, if applicable.

<table>
<thead>
<tr>
<th>Division of budgets per vendor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Code</td>
</tr>
<tr>
<td>TEST-2066</td>
</tr>
<tr>
<td>TEST-2067</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Division of budgets per each invoice:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Number</td>
</tr>
<tr>
<td>125</td>
</tr>
<tr>
<td>25121</td>
</tr>
<tr>
<td>51119</td>
</tr>
<tr>
<td>5131</td>
</tr>
<tr>
<td>5140</td>
</tr>
<tr>
<td>6148</td>
</tr>
</tbody>
</table>

An example of the Invoice Report Summary, produced with the Invoice Report, is shown below. These invoices are marked Not Ready to be Paid.

<table>
<thead>
<tr>
<th>Division of budgets per each invoice:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Number</td>
</tr>
<tr>
<td>125</td>
</tr>
<tr>
<td>25121</td>
</tr>
<tr>
<td>51119</td>
</tr>
<tr>
<td>5131</td>
</tr>
<tr>
<td>5140</td>
</tr>
<tr>
<td>6148</td>
</tr>
<tr>
<td>113</td>
</tr>
<tr>
<td>12345</td>
</tr>
<tr>
<td>34</td>
</tr>
<tr>
<td>5422</td>
</tr>
<tr>
<td>555558</td>
</tr>
</tbody>
</table>

Total Sum: (1597.00)
Lesson 5: Creating Reports for Collection Development and Maintenance

This lesson provides descriptions and examples of reports that can be used for collection development purposes. Item- and/or holdings-level reports are used for this purpose. This lesson describes item-level reports; Lesson 6 describes holdings-level reports.

To run Items reports:

1. Open the Circulation or Cataloging module. On the Services menu, point to Items and then select the report needed.
2. A report submittal form will appear. Complete the fields to define report parameters (parameters are described in the following tasks). Fields marked with an asterisk (*) on the form are mandatory.
3. Click Submit to run the report.
4. Retrieve the report from the Task Manager.

Overview of the Items General Retrieval Form

The Items General Retrieval Form (GRF) is the most commonly used report for items records. The Items GRF can be used to create a wide variety of reports, depending on criteria used to retrieve records and the report format chosen. Several data selections and report formats are available.
The Items GRF includes the following options:

- **Input File**: Use this field only if it is necessary to narrow a report already run. Enter the name of the report.

- **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.

- **Retrieve By**: Parameters can be used alone or in combination to create a report of items that meet specific criteria.
Codes entered in one retrieval area are joined by a Boolean “OR” statement. Only five entries can be joined by “OR.” For example, if retrieving by item process status, listing up to five statuses would retrieve each status listed.

Codes entered between retrieval fields are joined by a Boolean “AND” statement. For example, if retrieving by item process status and material type, it would be possible to retrieve (WD, IP, or OR) and BOOK.

- **ADM doc. Number:** Enter a range of values. Enter the starting number in field 1 and the ending number in field 2. When retrieving according to ADM number code, the number must be nine characters long (include leading zeroes).

- **Sublibrary:** Enter the sublibrary code(s) to retrieve item records that belong to particular sublibraries. Enter up to five sublibrary codes in fields 1-5.

- **Item Status:** Enables retrieval of item records with specific item statuses. The item status code must be entered, not the words indicating the item status. Enter up to five different item status codes (e.g., 01, 04) in fields 1-5. Item statuses are customizable per college. Enter a valid Item Status code, as indicated in the tab15 configuration table. Some statuses common among the colleges, with their corresponding codes, are: Book Loan (01), Reference Books (03), and Periodicals (04).

- **Item Process Status:** Enables retrieval of item records with specific item process statuses. Enter up to five item process status codes (e.g., WD, IP) in fields 1-5. Item Process Statuses are customizable per college. Enter a valid Item Process Status code, as indicated in the tab15 configuration table. Some statuses common among the colleges, with their corresponding codes, are: Order Initiated (OI), On Order (OR), Missing (MI), Withdrawn (WD), and Cancelled (CA). Enter ZZ to signify a blank item process status.

- **Item Collection:** Enables retrieval of item records according to collection. Enter up to five different collection codes (e.g., CIRC, REF) in fields 1-5. Collections are customizable per college. Enter a valid Collection Code as indicated in the tab40 configuration table. Some process statuses common among the colleges, with their corresponding codes, are: Circulation (CIRC), Reference (REF), Audio-Visual (AV), and Reserves (RESER).

- **Depository ID:** Enables retrieval of item records according to the Depository ID. Enter up to five Depository ID codes in fields 1-5. Depository IDs are customizable per college. Enter 1-5 valid depository IDs.

- **Item Year:** This filter will retrieve item records according to the year entered in the Chron. Level 1(I)(Yr.) field on the 5. Serial Levels tab. Enter the desired year(s) in fields 1-5, placing only one year in each field. Enter year in the format YYYY, for example, 2002.

- **Item Description:** Enables retrieval of items records according to the text in the Description field. Enter the retrieval text in fields 1-5. The fields are case sensitive and limited to 20 characters.
- **Item Call number**: To retrieve records by their first or second call number, enter the desired call numbers in fields 1-5. Note the following:
  - Entering two call numbers, one above the other, does not signify a call number range, unlike some other submittal forms where entering two values indicates a range. The Items GRF will retrieve only the call numbers entered.
  - Entering a partial string is the equivalent of conducting a keyword search. The system will retrieve all records whose call numbers contain the string entered. For example, entering T as the call number will retrieve any call number containing the letter T, and not all call numbers in the T’s.
  - The fields are case sensitive.

- **Inventory Date**: To retrieve records by inventory date, enter the date range. Enter the “from” date in the field 1 and the “to” date in the field 2.

- **Inventory Number**: To retrieve records by inventory number, enter the number(s) in fields 1-5. Include any alphabetic prefix. The fields are case sensitive.

- **Open Date**: To retrieve records by their open date, enter the “from” date in field 1 and the “to” date in field 2. Use the format YYYYMMDD.

- **Update Date**: To retrieve records by update date, enter the “from” date in field 1 and the “to” date in field 2. Use the format YYYYMMDD.

- **Number of Loans**: This filter enables retrieval according to the number of times an item was loaned. The filter checks for a range between the value entered in the first field and the value entered in the second field. If no value is entered in the first field, the default is 0 (zero). If no value is entered in the second field, the default is 999.

- **Material Type**: To retrieve records according to material type, enter a valid material type in uppercase, as indicated in the tab25 configuration table. Material types are customizable per college. Some material types common among the colleges are: BOOK, VIDEO, AUDIO, and ISSUE.

- **Cataloger**: To retrieve records by the user who created the item, enter the LINCC username in the first field. Enter the username exactly as used to log in to LINCC.

- **Statistics**: This four-part field in the item record can be used to designate items that are similar for retrieval. Enter the codes exactly as seen in the item statistic field of the item record.
- **Arrival Date:** To retrieve records by arrival date, enter a range of dates between which the items were arrived. Enter the “from” date in field 1 and the “to” date in field 2. Use the format YYYYMMDD.

- **Report Format:** The selection of an appropriate report format is a very important step when running the Items GRF. Report formats determine the data fields that are displayed in the report. Reports including a column heading for barcodes exist in two formats: barcodes printed as numbers (listed first) and scannable barcodes (listed second). The number in parentheses next to the report with scannable barcodes is the unique identifier which appears in the upper left corner of the report. Special instructions for setting printing margins are included in the Help available on the report submittal form. The on-screen Help also includes a list of report formats and definitions.

- **Sort Report By:** Select a sort preference for GRF-00 and GRF-02 formats. The sort value for other reports is preset and cannot be changed.

If report format GRF-00 or GRF-02 are chosen and sorted by call number, the reports will be organized as follows:

- Records with no holdings record (e.g., records that may be IP, OR, OI, etc.), no call number type in either the holdings or item record, or with a call number type in the Item record but not the holdings record will be listed in order first.

- Items grouped by call number type recorded in the record, in order by call number type (e.g., 0, 1, 2, 3, 4, 5, 6, 7, and 8) first, then in order by call number within each type.

- The sort in GRF-00 and GRF-02 correctly ignores subfield k (containing REF, AV, etc.), when subfields are alphabetized.

- When subfield k, containing REF, AV, etc., is not alphabetized, the call numbers sort as though REF, AV, etc., is part of the call number.
Task 5.1: Listing Materials on Specific Subjects

Reports Used: GRF-00, Citation Print from the LINCC Client

Lists of materials by subject can be created from the LINCC client by conducting a search in the Search activity tab and using print features. The results will need to be properly formatted in word processing software if a bibliography is being produced.

To create a list of materials on a specific subject using the GRF-00:

1. Open the Circulation or Cataloging module. On the Services menu, point to Items.
2. Click General Retrieval Form; the submittal form will appear.

   ![General Retrieval Form](image)

3. Complete the fields described below.
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Retrieve By**: Retrieve by the Call Number representing the subject area. Use the Item Call No. 1 field. Use any other appropriate retrieval fields, such as sublibrary.
   - **Report Format**: Select report format 00.
   - **Sort Report By**: Select the call number sort.
4. When finished, click Submit.
To create a list of materials by subject using the LINCC client:

1. In any module, select the **Search** activity tab and conduct a search in the **Find** node. Refine the search as necessary.

2. If the results include five records or fewer, the set will automatically appear in “Show” view. If there are more than five results, the set will appear in the lower pane of the Find node. Click Show.

3. In the upper pane, click **Sort** to sort the records as desired. Click on the first and last record in the list to select all. Click **Print/Send**.

4. In the window that appears, select **Citation**. Click **OK**.

An example of the citation printout is shown below. These records are from the results set. Use CTRL+A to select all text and CTRL+C to copy the text. Use CTRL+V to paste the copied text into word processing software where it can be edited.
Task 5.2: Obtaining Usage Data for Books

Report Used: GRF-02

The Item's GRF format 02 can be used to obtain usage data for books. The form can be used to retrieve data based on a wide variety of parameters, including number of loans. GRF-02 produces several loan-related fields. The report can be run from the Items menu in the Cataloging or Circulation modules.

To obtain usage data for books:

1. In the Circulation or Cataloging modules, on the Services menu, point to Items.
2. Select the General Retrieval Form; a submittal form will appear.
3. Complete the following fields:

- **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.

- **Retrieve By**: Retrieve by Sublibrary, Collection, Call Number, and Number of Loans, or other appropriate retrieval fields, such as material type.

- **Report Format**: Choose report format 02.

- **Sort Report By**: Choose the call number or title sort, depending on needs.
4. When finished, click Submit.

An example of the GRF-02 for collection development is shown below.

<table>
<thead>
<tr>
<th># of Loans</th>
<th>Date Returned</th>
<th>Title</th>
<th>Material</th>
<th>Sublibrary</th>
<th>Collection</th>
<th>Call No.</th>
<th>Barcode</th>
<th>Loaned</th>
</tr>
</thead>
<tbody>
<tr>
<td>003</td>
<td></td>
<td>The Acharians</td>
<td>Book</td>
<td>SC/Feat.</td>
<td>2nd Floor/Circulation</td>
<td>PA327_A6.1861</td>
<td>3450100035515 N</td>
<td></td>
</tr>
<tr>
<td>005</td>
<td></td>
<td>The Aenoid of Vells</td>
<td>Book</td>
<td>SC/Feat.</td>
<td>2nd Floor/Circulation</td>
<td>PA4507_A5.223</td>
<td>345010002096506 N</td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>06/13/2002</td>
<td>Eschylean drama</td>
<td>Book</td>
<td>SC/Feat.</td>
<td>2nd Floor/Circulation</td>
<td>PA3829.G3</td>
<td>345010004106509 N</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>06/13/2003</td>
<td>Aeschylus</td>
<td>Book</td>
<td>SC/Feat.</td>
<td>2nd Floor/Circulation</td>
<td>PA3829.H45.1965</td>
<td>34501000142296 N</td>
<td></td>
</tr>
<tr>
<td>009</td>
<td></td>
<td>Aeschylus</td>
<td>Book</td>
<td>SC/Feat.</td>
<td>2nd Floor/Circulation</td>
<td>PA3227_A47</td>
<td>345010002893562 N</td>
<td></td>
</tr>
</tbody>
</table>

Task 5.3: Creating a List of Materials by Item Process Status

Report Used: GRF-01 with Scannable Barcodes

Reports can be run by item process status. Since item process status is customizable by college, `pc_tab_exp_field` or the tab15 configuration table should be consulted to determine the codes to be entered on the report submittal form. Once the code(s) are determined, staff should determine which report format to use. For example, if the report will be given to other staff members to change data in the item records, delete records, or research records in the client, a report with scannable barcodes, as shown in this example, may be helpful.
To complete this task:

1. In the Circulation or Cataloging modules, on the Services menu, point to Items. Select the General Retrieval Form.

2. Complete the following fields:
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Retrieve By**: Select Item Process Status in the first retrieval field, and then enter the Item Process Status code desired. Use additional retrieval fields to narrow the retrieval, such as Material Type and Sublibrary.
• **Report Format:** Select the appropriate report format. In this example, GRF-01 with scannable barcodes was selected to make the process of withdrawing records from the LINCCWeb catalog (OPAC) and OCLC flow more smoothly.

3. When finished, click **Submit**.

The LINCC client no longer includes the Carolina Bar font used for scannable barcodes. When viewing the reports in Aleph, the barcode column will be blank. However, when copy/pasted into Excel, which does come with the Carolina Bar font, the scannable barcodes will appear. To enable the client to display and print scannable barcodes, contact the college’s local IT department to have the font copied into each local computer’s windows font directory.

An example of the report showing all withdrawn books at the Bradenton campus is shown below.

![An example of the report showing all withdrawn books at the Bradenton campus is shown below.](image-url)
Task 5.4: Listing Items by Material Type, Showing Count

Report Used: GRF-07

Staff may want to run a report of items of a particular material type to use for collection development, to share with faculty, or for special projects. Since material type is customizable per college, the tab25 configuration table should be consulted for allowable codes.

To complete this task:

1. In the **Circulation** or **Cataloging** modules, on the **Services** menu, point to **Items**.

2. Select the **General Retrieval Form**.

3. Complete the following fields:
   - **Input File**: Leave blank
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Retrieve By**: Enter up to six retrieval fields.
   - **Report Format**: Choose format GRF-07 from the drop-down menu. This report must be printed in landscape format. It is sorted by Sublibrary, Collection, and Call No. This report format summarizes the listed items at the top of the report by sublibrary, collection, and material type, if more than one material type is chosen. The report totals the price and number of items. Output fields are Sublibrary, Collection, Call No., Description, Title, Barcode, Material, Price, Item Process Status, and Update Date. The price is that found on the item record, not the default price.

4. When finished, click **Submit**.
An example of the report showing items in MJCBR and MJCVE with material type of MUMED is shown below.

### Overview of the Shelf List Report

The Shelf List report, intended to support a manual collection inventory, can also be used when printed shelf lists are needed for other collection maintenance activities, including weeding of the collection based on number of loans and last returned date. The report is available in real-time and can be produced manually by library staff.

If used for inventory purposes, the report should be run for the intended shelf range immediately prior to physically examining the shelves. This will lessen the likelihood that items have been checked out since the report was run.

The report is limited to 5000 items. If a shelf list of more than 5000 items is required, it will be necessary to break the request into multiple reports. The simplest shelf list would begin with “A1” and end with “Z999.” Because of the report limitation of 5000 items, this would only be practical for relatively small collections, but should be considered if inventorying a collection that uses a non-LC or non-DDC numbering.

Two factors significantly affect the Shelf List report: correct notation of the Call Number Type in the holdings record and the order of call number subfields in the holdings record.
To run the Shelf List report:

1. In the Circulation or Cataloging module, on the Services menu, point to Items, and then click Shelf List.

2. Complete the following fields:

   - **From Call No., To Call No.:** Enter the call numbers in the range to be retrieved. Enter the beginning and ending call numbers exactly as they appear in the item record. These fields are case sensitive.

Examples of beginning/ending LC number searches:

From DF77 To DF759 .L385
From B To BL

Examples of beginning/ending DDC number searches:

From 613 To 613.28
From 613.28 G45t To 613.28 SMITH

A report will begin with the number entered in the From Call No. field. The second call number will fall just outside the range on the report.

Collections that utilize non-LC or non-DDC schemes can be accommodated by the Shelf List report, but due to variances in local college cataloging practices, may require some experimentation to produce a successful report.

   - **Call No. Type:** Defines the call number types that will be retrieved in the report. Select the appropriate call number type; LC or DDC should be selected in most cases.

Sometimes a Shelf List report will not appear to have run correctly. It is important to check the data to ensure it is recorded correctly. The call number type is located in the Item record on Tab 2. General Information.

```
Call No. Type/Call No.: 0 $$$AC1 .857
```

For example, LC call numbers are represented by a 0 in the Call No. Type field in the item record. If another numeric value is in this field, the item will not appear on the Shelf List report even though the call number itself is an LC call number. The call number type in the item record is controlled by the holdings record. All corrections must be made in the holdings record. FLVC can run cleanup reports listing records with incorrect call number types upon request.
- **Call No./2nd Call No.:** Select 1st Call No.
- **Sublibrary:** Select a sublibrary from the list.
- **Collection:** Enter the collection code, such as CIRC or AV. This field is case sensitive.
- **Item Status:** The default report will include all item statuses. Select Include or Exclude and then select specific statuses to include or exclude from the report.
- **Item Process Status:** Select the appropriate option.
  - To include all statuses, choose Include the Following Item Process Statuses and select All.
  - To include or exclude a particular status, choose the appropriate option and select the relevant item process status.
  - To exclude all statuses, chose Include the Following Item Process Statuses and select ZZ (space as value).

---

Lost is a circulation status. Lost items appear on the Shelf List report as though they were on the shelf.

---

- **Output File:** Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
- **Update Database:** Select Yes to update the Last Shelf Report Date field with the date. If running the report for inventory purposes, it may be useful to know that the item was on the shelf on that date. Select No if running the report for weeding or collection development.
- **Report Format:** The selection of an appropriate report format is a very important step when running the Shelf List report. Report formats determine the data fields that will be displayed in the report. Click Help on the report submittal form to view a list of report formats and definitions. Shelf List format 08 includes the most loan data and may be useful in making weeding decisions.

<table>
<thead>
<tr>
<th>Format</th>
<th>Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>02 - Barcode</td>
<td>Call No.</td>
</tr>
<tr>
<td>03 - Barcode-scannable</td>
<td>Call No.</td>
</tr>
<tr>
<td>04 - Barcode</td>
<td>Call No.</td>
</tr>
<tr>
<td>05 - Barcode</td>
<td>Call No.</td>
</tr>
<tr>
<td>06 - Barcode</td>
<td>Call No.</td>
</tr>
<tr>
<td>07 - PlainText for 3M - Barcode</td>
<td>Year</td>
</tr>
<tr>
<td>08 - Cal No.</td>
<td>Description</td>
</tr>
<tr>
<td>09 - Barcode</td>
<td>Call No.</td>
</tr>
</tbody>
</table>

3. When finished, click **Submit**.
An example of the report with loan data is shown below.

<table>
<thead>
<tr>
<th>Call No</th>
<th>Description</th>
<th>Title</th>
<th>Pub Date</th>
<th>Item Status</th>
<th>Barcode</th>
<th>Due Date</th>
<th>Loans</th>
<th>Last Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>FS613 .A4 2000 v.1 c.1</td>
<td>American poetry</td>
<td>2000</td>
<td>Book</td>
<td>FS501 010333939</td>
<td>014</td>
<td>02/10/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Task 5.5: Running Inventory Reports for Collection Maintenance

Report Used: Shelf List Report

Currently, a manual inventory can be conducted by running a Shelf List report and comparing the report to items on the shelf. The report currently shows lost items as being on the shelf, so it is important to first run a lost report in order to mark lost items on the shelf list. Refer to the LINCC Inventory help sheet, available from FLVC’s Library Staff Resources web page, for details on conducting an inventory, including using inventory reports.
To complete this task:

1. In the Circulation or Cataloging module, on the Services menu, point to Items, and then click Shelf List.

2. Complete the following fields:

   - From Call No., To Call No.: Enter the call numbers in the range to be retrieved. Enter the beginning and ending call numbers exactly as they appear in the item record. These fields are case sensitive. Examples are shown below.
     
     LC: From DF77 -- To DF759 .L385 and From B -- To BL
     
     DDC: From 613 -- To 613.28 and From 613.28 G45t -- To 613.28 SMITH
     
     A report will begin with the number entered in the From Call No. field and will end with the number entered in the To Call No. field.

     Collections that utilize non-LC or non-DDC schemes can be accommodated by the Shelf List report, but because of variances in local college cataloging practices over time, may require some experimentation in order to produce a successful report.

   - Call No. Type: This field defines the call number types that will be retrieved in the report. Select the appropriate call number type; LC or DDC should be selected in most cases.

   - Call No./2nd Call No.: Select 1st Call No.

   - Sublibrary: Select a sublibrary from the list.

   - Collection: Enter the collection code (e.g., CIRC). The field is case sensitive.

   - Item Status: The default report will include all item statuses. Click Include or Exclude and then select the appropriate statuses to include or exclude for the report.

   - Item Process Status: Select the appropriate option.
     
     - To include all statuses, choose Include the Following Item Process Statuses and select All.
     
     - To include or exclude a particular status, choose the appropriate option and select the relevant item process status.
     
     - To exclude all statuses, chose Include the Following Item Process Statuses and select ZZ (space as value).

   - Output File: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
• **Update Database:** Selecting Yes will cause the Last Shelf Report Date field to be updated with the date. If running the report for inventory purposes, it may be useful to know that the item was on the shelf on that date. In this case, click Yes; otherwise, click No.

• **Report Format:** The selection of an appropriate report format is a very important step when running the Shelf List report. The report format determines the data fields that will be displayed in the report. Click Help on the submittal form to view a list of report formats and definitions.

3. When finished, click **Submit**.

Lost is a circulation status. Lost items appear on the Shelf List report as though they were on the shelf. Report format GRF-09 includes a column for the loan status.
Task 5.6: Creating a Shelf List Report for Reference Materials

Report Used: Shelf List Report

The alphabetization of call number subfields in the holdings records is critically important when running a shelf list for call numbers with REF, AV, etc., preceding the call number. The order varies locally. In some colleges, a call number might be represented as $$kREF$$hAI3.E752, while the same call number might be entered as $$hAI3.E752$$kREF at another college. If a college has call numbers constructed both ways, all the items cannot appear on a single report until the construction of the call numbers is corrected in the holdings records.
To complete this task:

1. In the Circulation or Cataloging module, on the Services menu, point to Items, and then click Shelf List.

2. Complete the following fields:

   - **From Call No., To Call No.**:
     - Enter the call numbers in the range to be retrieved. Enter the beginning and ending call numbers exactly as they appear in the item record. These fields are case sensitive.
     - If the subfields are in alphabetical order, a Shelf List report for reference must be run this way:
       
       From AG6 .N495  To  B
       
     - If the subfields are not in alphabetical order, a Shelf List for reference must be run this way, including REF before the actual call number:
       
       From  REF AG6 .N495  To  REF B

   - **Call Number Type**:
     - This field defines the call number types that will be retrieved in the report. Select the appropriate call number type; LC or DDC should be selected in most cases.

Sometimes a shelf list will appear to not run correctly. It is important to check the data to be sure it is recorded correctly. The call number type is located in the Item record on Tab 2, General Information.

For example, LC call numbers are represented by a 0 in the Call No. Type field in the item record. If another numeric value is in this field, the item will not appear on the Shelf List report even though the call number is an LC call number. The call number type appearing in the item record is controlled by the holdings record. All corrections must be made in the holdings record. FLVC can run cleanup reports listing records with incorrect call number types upon request.

- **Call No./2nd Call No.**:
  - Select 1st Call No.

- **Sublibrary**:
  - Select a sublibrary from the drop-down menu.

- **Collection**:
  - Enter the collection code, such as REF or AV. This field is case sensitive.

- **Item Status**:
  - The default report will include all item statuses. Click Include or Exclude and then select appropriate statuses to include or exclude for the report.
- **Item Process Status**: Select the appropriate option.
  - To include all item process statuses, choose Include the Following Item Process Statuses and select All.
  - To include or exclude a particular item process status, choose the appropriate option and select the relevant item process status.
  - To exclude all item process statuses, choose Include the Following Item Process Statuses and select ZZ (space as value).

Lost is a circulation status. Lost items appear on the Shelf List report as though they were on the shelf. Report format GRF-09 includes a column for the loan status.

- **Update Database**: Selecting Yes will cause the Last Shelf Report Date field to be updated with the date. If running the report for inventory purposes, it may be useful to know that the item was on the shelf on that date. In this case, click Yes; otherwise, click No.

- **Report Format**: The selection of an appropriate report format is a very important step when running the Shelf List. Report formats determine the data fields that will be displayed in the report. Click Help on the report submittal form to view a list of report formats and definitions.

3. When finished, click **Submit**.

An example of the report is shown below. These items are on the shelf for the range entered on the form.
Lesson 6: Creating Cataloging/Holdings Reports

This lesson provides descriptions and examples of commonly used reports generated for cataloging and holdings purposes.

Task 6.1: Listing Holdings for Centers

Report Used: Items GRF

The Items GRF retrieves item records based on a variety of criteria. All centers have been set up in LINCC as sublibraries. Depending on local practices, the Items GRF can be used to retrieve all items located at a given center. If item records are not created for centers, a cleanup report request can be submitted for a report based on holdings records.

To complete this task:

1. In the Circulation or Cataloging module, on the Services menu, point to General Retrieval Form.
2. Complete the following fields:
   - Output File: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - Retrieve by: Select a sublibrary. Enter the five-letter center code in uppercase.
- **Report Format**: Select a report format. Format GRF-03, shown below, is sorted by sublibrary, collection, call number, and description.

3. When finished, click **Submit**.

An example of the report is shown below. These items are held by the center.

<table>
<thead>
<tr>
<th>Doc Number</th>
<th>Title</th>
<th>Item/Proc Status</th>
<th>Sublibrary</th>
<th>Collection</th>
<th>Call No.</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>863420</td>
<td>Both's medical dictionary</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC R131 B598 1969</td>
<td>34001010472380</td>
</tr>
<tr>
<td>17711</td>
<td>Essay and general literature index</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF A3 ET52</td>
<td>34001010281823</td>
</tr>
<tr>
<td>0</td>
<td>Essay and general literature index</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF A3 ET52</td>
<td>34001010281871</td>
</tr>
<tr>
<td>0</td>
<td>Essay and general literature index</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF A3 ET52</td>
<td>34001010281849</td>
</tr>
<tr>
<td>0</td>
<td>Essay and general literature index</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF A3 ET52</td>
<td>34001010281895</td>
</tr>
<tr>
<td>0</td>
<td>Essay and general literature index</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF A3 ET52</td>
<td>34001010346689</td>
</tr>
<tr>
<td>40711</td>
<td>Dictionary of symbolism</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF AZ 10B B537 1952</td>
<td>34001010347953</td>
</tr>
<tr>
<td>255252</td>
<td>Dictionary of philosophy</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF B 41 R62 1962</td>
<td>34001010241999</td>
</tr>
<tr>
<td>500420</td>
<td>Encyclopedia of psychology</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF BF31 E52 1984</td>
<td>34001010212477</td>
</tr>
<tr>
<td>0</td>
<td>Encyclopedia of psychology</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF BF31 E52 1984</td>
<td>34001010212485</td>
</tr>
<tr>
<td>0</td>
<td>Encyclopedia of psychology</td>
<td></td>
<td>Manatee Classroom Center</td>
<td>Reference</td>
<td>MJC REF BF31 E52 1984</td>
<td>34001010212489</td>
</tr>
</tbody>
</table>

**Lesson 7: Creating Serials Reports**

This lesson provides descriptions and examples of commonly used reports generated from the Acquisitions/Serials module.

**To run Serials reports:**

1. Open the **Acquisitions/Serials** module. On the **Services** menu, point to **Serials**, and then select the desired report.

2. A report submittal form will appear. Complete the fields to define report parameters (**parameters are described in the following tasks**). Fields marked with an asterisk (*) on the form are mandatory.

3. Click **Submit** to run the report.

4. Retrieve the report from the **Task Manager**.
Task 7.1: Obtaining Statistics on the Number of Issues Arrived


This service produces a statistical report of the number of issues that have arrived within a specified date range. The results are grouped by sublibrary, and by collection within a sublibrary. For each sublibrary, the total of arrivals is listed. A grand total of arrivals for all sublibraries is also listed.

To complete this task:

1. On the Services menu, point to Serials and then click Issues Arrival Statistics by Sublibrary - Dates.
2. Complete the following fields:
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Sublibrary**: Select any or all sublibraries to be included in the report.
   - **From Date/To Date**: Enter the dates between which the serial items were arrived. Select the range using the calendar feature or by typing directly in the date field. Leave 00/00/0000 in one or both fields to expand the search date range. For example, leaving 00/00/0000 in the From Date field and entering 30/06/03 in the To Date field will create a date range of all dates up to 30/06/03.
3. When finished, click Submit.

An example of the report showing the number of issues arrived by collection for MJCBR is shown below.

```
Arrivals of issues, period: 20140701 - 20140731; SBL - MJCBR
Sub- Collection No. Arrivals
library  ------- -----------
MJCBR PER  17
sum       17
TOTAL Arrivals Stats for sublibraries MJCBR 20140701 - 20140731
```
Task 7.2: Obtaining Statistics on the Number of Issues Arrived, By Title

Report Used: Number of Arrived Issues

The Number of Arrived Issues report retrieves serial titles for which issues have arrived within a specified date range. If issues have not been arrived for the title, it will not be listed on the report. The report can be generated for all sublibraries or limited to a particular sublibrary.

To complete this task:

1. On the Services menu, point to Serials and then click List of Serial Titles + Number of Arrived Issues.
2. Complete the following fields:
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Sublibrary**: Select one or more sublibraries to be included in the report. Choose All to include order log details of all sublibraries.
   - **Arrival Date (From/To)**: Enter the dates between which the serial items were arrived. Select the range using the calendar feature or by typing directly in the date field. Leave 00/00/0000 in one or both fields to expand the search date range. For example, leaving 00/00/0000 in the Arrival Date From field and entering 12/31/2006 in the Arrival Date To field will create a date range of all dates up to 12/31/2006.
   - **Report Format**: Select one of two report formats.
     - **Number-of-issues-00**: Sorts by title in ASCII order.
     - **Number-of-issues-01**: Sorts by title in ASCII order, ignoring the words “a,” “an,” and “the” when they occur at the beginning of a title. Non-filing indicators are not available for this report.
3. When finished, click Submit.
An example of the report with the number of issues arrived by title is shown below.

| Arrival Date From: | 07/01/2014 |
| Arrival Date To:   | 07/31/2014 |
| **TOTAL**          | 17          |
| **Title**          | **Arrivals** |
| Advertising age    | 5           |
| Sky and telescope  | 12          |

**Task 7.3: Listing Claims**

**Report Used: Serials Claim Report**

The Serials Claim report can be run manually and can be used to print letters, reports, or both. It can be used whether or not batch claiming has been used. The steps outlined below are those required to produce a report only, ignoring whether or not batch claiming has been selected in the subscription record and without changing the next claim date. The Serials Claim Report is published monthly on the LRS as S009 using criteria outlined in these steps.
To complete this task:

1. On the **Services** menu, point to **Serials** and then click **Print Claim Letters/Report**.

2. Complete the following fields:
   - **Input File**: Leave blank.
   - **Input File Type**: Do not change the default setting, BIB Record Numbers.
   - **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Output Type**: Select Report (Subscription “Send Claim” is ignored) to produce a report whether or not batch claiming has been selected on Tab 3 of the Subscription Record.
   - **Letter Format**: Do not change the default setting as it is not relevant for the report. Letters will only be produced if an Output Type specifying letters has been selected.
   - **Report Format**: Choose Report (Subscription “Send Claim” is ignored).
   - **Sort Report Output By**: Select Title or Vendor.
   - **Sublibrary**: Select the relevant sublibrary
   - **Vendor Code**: Select the vendor code. If left blank, the report will include all vendors.
   - **No. of Claims Filter**: Select the records to be included in the report. Select Any Claim to report on all possible items.
   - **Update Database**: Select No to produce only the report. (Selecting Yes will update the next claim date in records for which the batch claiming feature has been selected.)
   - **Item Status**: Do not change the default setting, All.
   - **Item Process Status**: Leave at the default of All, or include relevant statuses, such as Not Arrived and Claimed.
   - **Create Triggers**: Not used.
   - **Expected Arrival Date**: Enter a date to create claims on items which have not arrived up to that date. The default is the current date.

3. When finished, click **Submit**.
An example of a report, listing all issues which have not arrived as of July 7, 2014 is shown below.

<table>
<thead>
<tr>
<th>Bib Info</th>
<th>System No.</th>
<th>ISSN</th>
<th>Vendor</th>
<th>Issue Description</th>
<th>Library</th>
<th>Issue Date</th>
<th>Exp. Arrival Date</th>
<th>Batch Claim</th>
<th>No. of Claims</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator (Madison, Wis.), Administrator, Madison, Wis. : Magna Publications (1982-).</td>
<td>477725</td>
<td>9744-7078</td>
<td>EBSCO</td>
<td>v. 28 no. 1 (2009 : Jan.)</td>
<td>SCP/Bradenton</td>
<td>01/01/2009</td>
<td>01/15/2009</td>
<td>Yes</td>
<td>000000000</td>
</tr>
<tr>
<td>Administrator (Madison, Wis.), Administrator, Madison, Wis. : Magna Publications (1982-).</td>
<td>477725</td>
<td>9744-7078</td>
<td>EBSCO</td>
<td>v. 28 no. 3 (2009 : Feb.)</td>
<td>SCP/Bradenton</td>
<td>02/01/2009</td>
<td>02/15/2009</td>
<td>Yes</td>
<td>000000000</td>
</tr>
<tr>
<td>Administrator (Madison, Wis.), Administrator, Madison, Wis. : Magna Publications (1982-).</td>
<td>477725</td>
<td>9744-7078</td>
<td>EBSCO</td>
<td>v. 28 no. 4 (2009 : Mar.)</td>
<td>SCP/Bradenton</td>
<td>03/01/2009</td>
<td>03/15/2009</td>
<td>Yes</td>
<td>000000000</td>
</tr>
<tr>
<td>Administrator (Madison, Wis.), Administrator, Madison, Wis. : Magna Publications (1982-).</td>
<td>477725</td>
<td>9744-7078</td>
<td>EBSCO</td>
<td>v. 28 no. 6 (2009 : Apr.)</td>
<td>SCP/Bradenton</td>
<td>04/01/2009</td>
<td>04/15/2009</td>
<td>Yes</td>
<td>000000000</td>
</tr>
</tbody>
</table>

An example of the report, run monthly as a campus-level report on the LRS (S009), is shown below.

<table>
<thead>
<tr>
<th>Bib Info</th>
<th>System No.</th>
<th>ISSN</th>
<th>Vendor</th>
<th>Issue Description</th>
<th>Issue Date</th>
<th>Arrival Date</th>
<th>Batch Claim</th>
</tr>
</thead>
</table>
Lesson 8: Using the ALEPHADM Module for Circulation Services

Before running a report, it is important to know what information is needed for retrieval and printing, and how it is stored in the database. Data must be entered on report submittal forms exactly as entered on the relevant record (e.g., item, order, patron), unless there is a drop-down menu on the retrieval form from which to make selections.

Data is usually retrieved by the code for the data element, not the name translation, so it is important to know what the codes and their corresponding name translations are. Some codes apply to all colleges and some codes are customizable by college. The codes used throughout LINCC can be found by looking at the record or by looking in the appropriate configuration table. For example, the table `pc_tab_exp_field.eng` contains the codes and name translations that appear on most drop-down menus in the LINCC client.

Task 8.1: Navigating the ALEPHADM Module

The ALEPHADM module contains files (also called tables or tabs) that configure the behavior of LINCC. Some settings in these tables apply to all LINCC colleges, some can be customized by college, and some can be customized by sublibrary (campus). Library policies are reflected in these tables (e.g., the loan period for items defined in the tab16 configuration table, and the lost item replacement charges defined in the tab34 configuration table). Knowing how to find the tables and codes that are relevant to reports will make running the reports a much easier process.

To retrieve a table in the ALEPHADM module:

1. Click the table icon in the lower right corner of the module window.
2. On the Tables menu, click Tables Navigator, or click the signpost icon.
3. Select the college name from the menu on the left, then select the Tab directory. The configuration tables will appear on the right.
4. Double-click the table containing the data needed.
5. When prompted to check out the table, click No. The table will appear as read-only and any changes will not be saved.
6. On the File menu, click View Source. The file will appear in Notepad with column explanations. Print the file if needed.
Task 8.2: Using Configuration Tables for Circulation Services

The following tables may be useful to review for reports:

- **Tab_delinq.eng**: Defines the manual blocks that can be selected in Global Patron Information form. The blocks can be selected from a drop-down menu when running the Patron List report.
- **Pc_tab_exp_field.eng**: Lists codes and translations that are useful when running a variety of reports including the Acquisitions and Items General Retrieval Forms.
- **Pc_tab_exp_field_extended.eng**: Lists borrower statuses and borrower types.
- **Tab15**: Defines the item statuses and various parameters connected to these statuses.
- **Tab25**: Defines Material Type codes and translations.
- **Tab32**: Defines the number of days until a loan changes to Lost status. This information is useful when running a loan report for lost items.
- **Tab40**: Defines collection codes and translations.

Lesson 9: Creating Circulation Reports

This lesson provides descriptions and examples of commonly used reports generated from the Circulation module.

To run Circulation reports:

1. Open the Circulation module. On the Services menu, point to a report category, and then select a report.
2. A report submittal form will appear. Complete the fields to define report parameters (*these parameters are described in the following tasks*). Fields marked with an asterisk (*) on the form are mandatory.
3. Click Submit to run the report.
4. Retrieve the report from the Task Manager.

Task 9.1: Running a Report of Lost Items

Report Used: Loan Report

The Loan report retrieves loan records based on a variety of criteria. A loan record is created when an item is checked out to a patron. When the item is returned, the loan record is deleted.

The loan record has a field for a loan status. This is separate from the item status and item processing status, which are stored in the item record. The loan status can be Active (checked out and may or may not be overdue, but not yet changed to Lost status), Lost (checked out and changed to Lost status), or Claimed Returned (checked out and marked Claimed Returned by library staff).
When running a Loan report to determine all items that have changed to Lost status in a given month, it is useful to know the library’s policy on number of days past the due date that an item will change to Lost (consult the tab34 configuration table). Date parameters on the report are by Due Date. If the policy is to have items change to Lost status when 30 days overdue, enter a due date range from 30 days before the beginning of the month to 30 days before the end of the month.

In the following example, the Loan report is used to retrieve a list of MJC Bradenton items that have been checked out to two-year students and have changed to Lost status in the month of January.

The selected format includes Call Number to facilitate searching for items on the shelf and is sorted is by due date, with oldest first.
To complete this task:

1. On the **Services** menu, point to **Reports** and click **Loan Report**.

2. Complete the following fields:
   - **Output File**: Enter the name for the saved loan report. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - **Sublibrary**: Choose the sublibrary or sublibraries for which loans will be retrieved. Select All to include all sublibraries.
   - **Loan Status**: Select the loan status to be included in the report. Statuses are described below.
     - **Active Loan**: Items that are currently checked out but have not yet changed to Lost status.
     - **Claimed Returned**: Items that are checked out but the patron claims they have been returned, and library staff have manually marked the item Claimed Returned in the patron record.
     - **Lost**: Items that are checked out and have changed to Lost status, either because they have been overdue longer than the policy file allows, or because they have been manually declared lost in the patron record.
     - **All**: All loan statuses.
   - **Patron Status**: To include all patron statuses, select Include the Following Patron Statuses and then select All in the Patron Statuses list. To include or exclude particular patron statuses, select the appropriate option and then select the relevant patron statuses in the Patron Statuses list.
   - **Due Date (From/To)**: The report will include items that are due between the dates entered. For all Lost items, regardless of due date, enter 00/00/000 in the Due Date From field.
   - **Sort Level 1, Sort Level 2**: The report may be sorted by borrower ID number, borrower name, due date, title, author, item location, item barcode, patron note 1, 2, 3 (from local user information), or ISBN-ISSN. Two levels of sorting are possible.
   - **Item Status**: To include all item statuses, select All. Or, select a specific item status from the list.
   - **Report Format**: Select a report format from the drop-down menu.

3. When finished, click **Submit**.
An example of the report is shown below. These items changed to Lost status in January 2007.

<table>
<thead>
<tr>
<th>Patron ID</th>
<th>Patron Name</th>
<th>Item Barcode</th>
<th>Item Status</th>
<th>Bib Info</th>
<th>Call Number</th>
<th>Loan Date</th>
<th>Due Date</th>
<th>Loan Status</th>
</tr>
</thead>
</table>

**Task 9.2: Creating a List of Delinquent Patrons**

**Report Used: Loan Report**

In the following example, the Loan report is used to retrieve a list of all two-year patrons who have any overdue books at the MJC Bradenton campus, whether or not the items are Lost. To enter the correct parameters, you must know the number of days until the item becomes overdue, as specified in the tab32 configuration table.

According to the information in the tab32 configuration table (shown below), all item statuses for all sublibraries and all patron statuses become overdue at seven days past the due date. They become Lost at 23 days past the date they became overdue (i.e., 30 days past the due date).

To open the Loan Report:
- On the Services menu, point to Reports and then click Loan Report.

To generate a list of delinquent two-year patrons at MJCBR, for example, enter the due date of today minus seven days in Due Date To field.
An example of the report is shown below. All of these patrons have overdue materials.

<table>
<thead>
<tr>
<th>Date</th>
<th>Report ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/17/2007</td>
<td>report0102</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Loan Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron ID</strong></td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>ID185</td>
</tr>
<tr>
<td>ID185</td>
</tr>
<tr>
<td>ID185</td>
</tr>
<tr>
<td>ID187</td>
</tr>
</tbody>
</table>

**Task 9.3: Determining Payments Received or Refunded at the Circulation Desk**

**Reports Used: Payments Received Report, Payments Report**

The Payments Received report and Payments report are available in the Circulation module.

The Payments Received report, accessed from the Services menu, contains more criteria for selection and provides greater flexibility in generating a payments report. The completed report is sent to the Task Manager.

The Payments report, accessed from the Reports menu, is a quick report for libraries that handle cash at the circulation desk. It may be used to balance the cash drawer at the end of each day. The report is generated within the Circulation module; it does not go to the Task Manager.

**To run a Payments Received report:**

1. Open the **Circulation** module. On the **Services** menu, point to **Cash Transactions**.
2. Click **Payments Received Report**; a submittal form will appear.
3. Complete the following fields:

- **Output File**: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen. The file can be retrieved later from the Task Manager.

- **Include Payments Filtered By**: Select the appropriate option.
  - **Workstation ID**: If selecting this option, enter the sublibrary code used in the workstations at the circulation desk.
  - **Library Staff Member**: If selecting this option, enter the user account name of the staff member.
  - **Credit or Debit**: Select Credit to include only cash transactions that have a status of Credit, such as money paid as a refund to a patron. Select Debit to include only cash transactions that the patron owes the library. Enter C (for Credit) or D (for Debit) in the lower field.
- **Patron Name**: If selecting this option, enter the patron name, without punctuation, in the order it appears in the Patron Information Name field.
- **Patron ID**: If selecting this option, enter a patron ID to find cash transactions related to a specific patron.
- **Item Barcode**: If selecting this option, enter a barcode to find cash transactions related to a specific item.
- **All**: Select All to generate a report of all payments received and refunded at all sublibraries of the institution.

- **Sublibrary**: Select the sublibrary or sublibraries for which a report of payments received should be run. Select All to include all sublibraries for which payments were received at the workstation, including payments received for items that are owned by another campus.

- **Payment Date (From/To)**: Enter the date or select the date from the calendar. The report will include all payments made between the dates entered.

- **Payment Hour (From/To)**: The report will include payments made between the hours entered. Include all hours that the library is open in 24-hour format.

- **Sort Report By**: The report may be sorted by Sublibrary or Date. If Sublibrary is selected, the system will automatically provide a secondary sort by date and hour. If Date is selected, there will be a summary line for all the transactions of each sublibrary or target, as well as the total.

- **Report Format**: Select a report format.

4. When finished, click **Submit**.

An example of the report is shown below. These cash transactions were Paid for the week of April 1 through April 7, 2007.

<table>
<thead>
<tr>
<th>Payments Received Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron Payments</strong></td>
</tr>
<tr>
<td>Cash</td>
</tr>
<tr>
<td>Cancelled/Waived</td>
</tr>
<tr>
<td><strong>Library Credits</strong></td>
</tr>
<tr>
<td>Cash</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Date</th>
<th>Hour</th>
<th>Receipt No.</th>
<th>Type of Transaction</th>
<th>Item Owning Sublibrary</th>
<th>Library Credit</th>
<th>Payment Paid</th>
<th>Status</th>
<th>Payment Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>01047</td>
<td>CCLA</td>
<td>04/09/2007</td>
<td>0124 PM</td>
<td>No.904</td>
<td>Lost Item-Processing Fee</td>
<td>Manatee/Bradenton</td>
<td>0.00</td>
<td>Paid</td>
<td>Cash</td>
<td></td>
</tr>
<tr>
<td>01047</td>
<td>CCLA</td>
<td>04/09/2007</td>
<td>0124 PM</td>
<td>No.904</td>
<td>Lost Item-Replacement Charge</td>
<td>Manatee/Bradenton</td>
<td>25.00</td>
<td>Paid</td>
<td>Cash</td>
<td></td>
</tr>
<tr>
<td>01047</td>
<td>CCLA</td>
<td>04/09/2007</td>
<td>0124 PM</td>
<td>No.904</td>
<td>Lost Item-Replacement Charge</td>
<td>Manatee/Bradenton</td>
<td>25.00</td>
<td>Paid</td>
<td>Cash</td>
<td></td>
</tr>
<tr>
<td>01047</td>
<td>CCLA</td>
<td>04/09/2007</td>
<td>0124 PM</td>
<td>No.904</td>
<td>Lost Item-Replacement Charge</td>
<td>Manatee/Bradenton</td>
<td>25.00</td>
<td>Paid</td>
<td>Cash</td>
<td></td>
</tr>
<tr>
<td>01047</td>
<td>CCLA</td>
<td>04/09/2007</td>
<td>0124 PM</td>
<td>No.904</td>
<td>Lost Item-Replacement Charge</td>
<td>Manatee/Bradenton</td>
<td>25.00</td>
<td>Paid</td>
<td>Cash</td>
<td></td>
</tr>
</tbody>
</table>
To run a Payment report:

2. In the window that appears, enter report parameters as described below.

- **From Date, And Hour**: Enter the date and time to begin the report, such as the library opening time.
- **To Date, And Hour**: Enter the ending date and time, such as the library’s closing time.
- **Create Report Using**: Select Staff Name to run the report for the currently logged-on staff account (for all workstations using that account). Select Workstation ID to run the report for all workstations using the workstation ID.
- **Sort Report By**: Select Sublibrary to sort by the campus owning the item. Payment Target is not used.

An example of the report is shown below. These cash transactions were Paid on April 6, 2007.

When the report is closed, you will be prompted to update the default time. Select Yes to automatically reset the From Date and Time to begin the next report at the ending time of the last report.
Task 9.4: Viewing a List of Blocked Patrons

Report Used: Patron List Report

The Patron List report can be used to create lists of patrons by various criteria, such as sublibrary, privileges expiration date, patron status and blocks.

In the following example, the Patron List report is used to produce a list of patrons who have had a manual block placed on their library record. The list can be used to retrieve the patron records and verify that the patron should still be blocked as he has not paid fines or returned overdue items.

Often, overdue items will be returned and the patron will be cleared at the business office, but library staff do not know to retrieve the patron record and remove the manual block. The patron will be blocked from all circulation activities until the block is removed.

To complete this task:

1. On the Services menu, point to Reports and click Patron List.
2. Complete the following fields:
   - Output File: Enter the name of the file as it will be saved on the server. The file name must be entered in lowercase with no spaces or special characters other than underscore and hyphen.
   - Sublibrary: Choose the appropriate sublibrary or sublibraries. Select the specific campus to run the report for patrons of only that campus. Or, select LINCC User to run the report for all campuses. If All is selected, patrons on the patron list will be duplicated, as most patrons have both a LINCC user record and a sublibrary record.
- **Patron Status**: Choose the patron status to be included in the list.

- **Privileges Expire After, Privileges Expire Before**: Limit the list of patrons to those whose privileges expire within a specific period of time. For example, to find patrons whose privileges expire in December 2005, enter 11/30/2005 for Privileges Expire After and 01/01/2006 for Privileges Expire Before. If you do not want to limit the list of patrons, leave 00/00/0000 in the Privileges Expire After field and enter 99/99/9999 in the Privileges Expire Before field.

- **Local Block Code**: Limit the list to patrons whose local record has a particular block code. If All is selected, the report will include all patrons regardless of Local Blocks.

- **Global Block Code**: Limit the list to patrons whose global record has a particular block code. If All is selected, the report will include all patrons regardless of Global Blocks.

- **Report Format**: Select a report format.

- **Sort Report By**: Use this field to sort the list of patrons by patron ID, patron barcode, or patron name.

3. When finished, click **Submit**.

An example of the report is shown below. These patrons have a manually placed global block.

<table>
<thead>
<tr>
<th>Patron ID</th>
<th>Patron Name</th>
<th>Address</th>
<th>Phone No.</th>
<th>Sublibrary</th>
<th>Patron Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID174</td>
<td>Smith, Joy</td>
<td>Joy Smith 100 Rainbow Lane, Bradenton, FL 38405</td>
<td>904-562-4567</td>
<td>Manatee/Bradenton</td>
<td>2 YEAR</td>
</tr>
<tr>
<td>ID189</td>
<td>Hopper, Margaret</td>
<td>Margaret Hopper 228 E Apple Way, Bradenton, FL 38101</td>
<td>904-456-7894</td>
<td>Manatee/Bradenton</td>
<td>2 YEAR</td>
</tr>
<tr>
<td>ID514</td>
<td>Smith, Janie</td>
<td>Janie Smith 25225 SW 258 St, San Antonio, Texas 78254</td>
<td></td>
<td>Manatee/Bradenton</td>
<td>CAMPUS STAFF</td>
</tr>
<tr>
<td>ID948</td>
<td>Lime, Joey</td>
<td>Joey Lime 100 Fruitree Lane, Bradenton, FL 32111</td>
<td>850-562-5383</td>
<td>Manatee/Bradenton</td>
<td>2 YEAR</td>
</tr>
</tbody>
</table>
Lesson 10: Using Custom Services

Custom services are available from the LINCC client and include reports written by FLVC staff to provide college staff a convenient way to run reports that are not routinely needed from the LRS. Custom reports require additional user permissions which can be obtained by submitting the form LINCC015: LINCC Staff Privileges Request (available from http://staff.lincc.net/forms.asp).

Custom reports are available from the Services menu of the Acquisitions, Cataloging, Circulation, and Interlibrary Loan modules; each module offers different custom services. After they are run, reports are available from the Task Manager. The output filename of the reports always begins with “CUSTOM.” Reports are purged from the system after one day. If the report is copied to the top part of the Task Manager, it remains there until it is deleted.

Custom reports will automatically place an entry in the Task Manager with a file size of zero. When the report is finished running, the entry in the Task Manager will be replaced with a file that has a size other than zero in the size column.

<table>
<thead>
<tr>
<th>Remote Name</th>
<th>Date</th>
<th>Time</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUSTOM-ITEM-01.lst</td>
<td>07/10/2014</td>
<td>0413 PM</td>
<td>4041522</td>
</tr>
</tbody>
</table>

To access custom services:

1. Open the Acquisitions, Cataloging, Circulation, or Interlibrary Loan module to access the relevant custom service. On the Services menu, point to Custom Services and then select the report.

2. A report submittal form will appear. Complete the fields to define the report parameters if there are fields to complete.

3. Click Submit.

4. Retrieve the report from the Task Manager.

To access documentation for custom services:

1. Open the Acquisitions, Cataloging, Circulation, or Interlibrary Loan module. On the Services menu, point to Custom Services – Documentation and then select Click HELP for documentation for all custom services.

2. A submittal form will appear.

3. Click Help to access online help. The file lists all custom reports and descriptions of each report.
Items with Blank Price

The Items with Blank Price custom service lists items with no price in the item field. The report excludes items in the EB (eBook) and PER collections. Information on the report includes sublibrary, item barcode and item title. This report is useful for cleaning up price fields in item records. The output filename is CUSTOM-ITEM-01.

To run the Items with Blank Price custom service:

1. Open the Cataloging module.
2. On the ALEPH menu, point to Connect to and then select the xxx50 library.
3. On the Services menu, point to Custom Services and then click Items with Blank Price (p-custom-item-01).
4. There are no parameters to complete on the submittal form. Click Submit to run the report.
5. Retrieve the report in the Task Manager.
The Items with Blank Price reports can be very large and can take a long time to run (from 45 minutes to several hours, depending on the data being retrieved). To determine whether the report is finished, select the Batch Log entry for the custom report. The status column should read “Success.” While the report is running, no other jobs started in the xxx50 can run. This includes other client run reports and jobs such as EDI submissions processed through the Task Manager. The other jobs will accumulate in the Batch Queue and will start immediately after custom-item-01 finishes.

New Community Patrons Added

The New Community Patrons Added custom service provides information on borrowers with borrower status “40” by default, although it can be changed to a different status. The borrower information includes the date the record was added, the ILL library, the home library and the limits for ILL. The report covers a time period specified at the time the report is run and can be used to make sure community patrons have the appropriate ILL limits. A total of the number of patrons reported is included at the end of the report. The output file name is CUSTOM-CIRC-01.

To run the New Community Patrons Added custom service:

1. Open the Circulation module. On the Services menu, point to Custom Services, and then click Custom Service – New Community Patrons Added.
2. Enter the date range when the patrons were added in the Date (From) and Date (To) fields.
3. Edit the Status field, if necessary.
4. Click Submit.
5. Retrieve the report in the Task Manager.

<table>
<thead>
<tr>
<th>Patron ID</th>
<th>Open Date</th>
<th>Lib.</th>
<th>Lib.</th>
<th>ILL Limit</th>
<th>ILL Limit</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>BECP133853</td>
<td>20130731</td>
<td>BELCO</td>
<td>BECO</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
<tr>
<td>BECP133827</td>
<td>20130730</td>
<td>BELCO</td>
<td>BECO</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
<tr>
<td>BECP134114</td>
<td>20130806</td>
<td>BELCO</td>
<td>BECO</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
<tr>
<td>BECP133396</td>
<td>20130716</td>
<td>BELCO</td>
<td>BECO</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
<tr>
<td>BECP133755</td>
<td>20130729</td>
<td>BELME</td>
<td>BEFME</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
<tr>
<td>BECP133409</td>
<td>20130717</td>
<td>BELCO</td>
<td>BECO</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
<tr>
<td>BECP133914</td>
<td>20130802</td>
<td>BELCO</td>
<td>BECO</td>
<td>100</td>
<td>9999</td>
<td>40</td>
</tr>
</tbody>
</table>

**Items Not Circulated in 5 Years**

The Items Not Circulated in 5 Years custom service lists all items within the requested call number range that have not circulated in the last five years, excluding items with a process status of OI, OR, WD, MI, or IP, and is beneficial for collection development. The report may be limited to a specific campus and collection. The report is produced in HTML format to allow for easier manipulation of the data in Microsoft Excel. The output filename is CUSTOM-CIRC-03.html.

**To run the Items Not Circulated in 5 Years custom service:**

1. Open the Circulation module. On the Services menu, point to Custom Services, and then click Custom Service – Items Not Circulated in 5 Years.
2. Complete the Beginning Call Number and Ending Call Number fields.
3. In the Collection field, enter the collection code.
4. Select a Sublibrary from the drop-down menu.
5. Click Submit.
6. Retrieve the report in the Task Manager.

<table>
<thead>
<tr>
<th>Sublibrary</th>
<th>Collection</th>
<th>Call Nbr</th>
<th>Barcode</th>
<th>Title</th>
<th>Author</th>
<th>Open Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>GCCPA</td>
<td>CIRC</td>
<td>AC1_A4</td>
<td>34001010013835</td>
<td>The Harvard classics, /</td>
<td>159960522</td>
<td></td>
</tr>
</tbody>
</table>
List of Items in Collection by Material Type with # of Loans

The List of Items in Collection by Material Type with # of Loans custom service enables libraries to create a list of items in a collection by specific material type with the number of loans during a specific time frame. The report includes the item barcode, title, and the number of loans during the period specified. The report is produced in HTML format to allow for easier manipulation of the data in Microsoft Excel. The output filename is CUSTOM-CIRC-04.html.

To run the List of Items in Collection by Material Type with # of Loans custom service:

1. Open the Circulation module. On the Services menu, point to Custom Services, and then click Custom Service – List of Items in Collection by Material Type with # of Loans.

2. Complete the Date From and Date To fields.

3. Enter a Sublibrary.

4. In the Collection field, enter the collection code.

5. Click Submit.

6. Retrieve the report in the Task Manager.

If no items have circulated based on the criteria entered in the fields on the form, the report will be blank even though it may have a file size other than zero in the Task Manager.
List of Items in Collection by Call Number Range

The List of Items in Collection by Call Number Range custom service retrieves a list of all items in the specified collection using a call number range. The list includes barcode, year of publication, call number, and title.

The output is intended to be used with the DLA device for RFID inventory, which requires the “LF” at the end of each line. The output filename is CUSTOM-CIRC-05-{call number range}.lst (e.g., CUSTOM-CIRC-05-AAZ.lst).

To run the List of Items in Collection by Call Number Range:

1. Open the Circulation module. On the Services menu, point to Custom Services, and then click Custom Service – List of Items in Collection by Call Number Range.

2. In the Campus field, enter the sublibrary code.
3. In the Collection field, enter the collection code.
4. Complete the Beginning Call Number and Ending Call Number fields.
5. Click Submit.
6. Retrieve the report in the Task Manager.

<table>
<thead>
<tr>
<th>Items in collection by call number (custom-circ-05) - MIJ50</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Campus</td>
</tr>
<tr>
<td>*Collection</td>
</tr>
<tr>
<td>*Beginning call number</td>
</tr>
<tr>
<td>*Ending call number</td>
</tr>
</tbody>
</table>

33201011753733|2000|AC1 .A67 2000|How to think about the great ideas :LF  
33201000251244|1933|AC1 .E8 no. 133|Guy Mannering :LF  
33201000251228|1940|AC1 .E8 no. 24|Emma /LF  
33201000251227|1964|AC1 .E8 no. 539-40 1964|Daniel Deronda. LF  
33201010196264|1964|AC1 .E8 no. 539-40 1964|Daniel Deronda. LF  
332010000251295|1959|AC1 .E8 no. 653|A century of English essays :LF  
332010000251293|1950|AC1 .E8 no. 854|Middlemarch,LF  
33201010191257|1930|AC1 .E8 no. 855|Middlemarch,LF  
332010000251301|1931|AC1 .E8 no. 863|Trilby /LF  
332010000251319|1937|AC1 .E8 no. 941|Plays and stories /LF  
332010000251327|1960|AC1 .E8 no. 986|Portuguese voyages, 1498-1665. LF  
332010000251269|1930|AC1 .E8 no. 225|Critical & historical essays,LF  
33201010191240|1930|AC1 .E8 no. 226|Critical & historical essays,LF  
332010000251236|1960|AC1 .E8 no. 66|The autocrat of the breakfast-table /LF  
332010000251335|1953|AC1 .E8 no. 993|The Tatler. /LF
Reasons for Unfilled ILL Requests

The Reasons for Unfilled ILL Requests custom service is available from the ILL module. The report provides information on unfilled requests, including the reason the request was unfilled, the document number, the ILL unit, and the date of the request. The output filename is CUSTOM-ILL-01.

To run the Reasons for Unfilled ILL Requests custom service:

1. Open the ILL module. On the Services menu, point to Custom Services and click Reasons for Unfilled ILL requests.

2. Complete the Date From and Date To fields.

3. Click Submit.

4. Retrieve the report in the Task Manager.

<table>
<thead>
<tr>
<th>July 11, 2014</th>
<th>Reasons for ILL Unfilled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom-ILL-01</td>
<td>From 20140710 to 20140710</td>
</tr>
<tr>
<td>Reason</td>
<td>Doc #</td>
</tr>
<tr>
<td>Answer (Type Unfilled - In use on loan) message to BELCO Note: &lt;&gt;</td>
<td>000001277100000000000003 BELEM</td>
</tr>
<tr>
<td>Answer (Type Unfilled - Other) message to BELCO Note: &lt;&gt;</td>
<td>000001276760000000000003 BELEM</td>
</tr>
<tr>
<td>Answer (Type Unfilled - Other) message to BELCO Note: &lt;&gt;</td>
<td>000001276760000000000003 BELEM</td>
</tr>
</tbody>
</table>
This page intentionally left blank.
Unit 3: Overview of Scheduled Reports

Scheduled reports are available from the LINCC Reports Service (LRS) online, or from the Task Manager in the LINCC client, depending on the nature of the report. The LRS is available from FLVC’s Library Staff Resources web page.

Reports are organized by their frequency: daily, weekly, monthly, and annual. The Report Descriptions link provides descriptions of reports available on the LRS.

Lesson 1: Retrieving Reports in the LINCC Reports Service

Use the following instructions to retrieve reports from the web-based LRS.

To retrieve a report from the LRS:

1. Go to FLVC’s State College Library Services Staff Resources web site at: http://staff.lincc.net.
2. In the Quick Links box, select LINCC Reports Service.
3. When prompted to log in, enter your LINCC username, password, and institution. Click Log In.
4. Click a report category to access a list of reports within the category. Locate and select a report.

LINCC Reports Service - LRS

Seminole State College

- Daily Reports
- Weekly Reports
- Monthly Reports
- Annual Reports
- Report Descriptions
- Reports to assist with surveys and accreditation
- Reports to assist colleges with collection development

Reports are available as PDF or HTML files. PDF files are complete, formatted reports and must be viewed and printed using Adobe’s Acrobat Reader software. HTML files are viewed in the browser and may be printed or copy/pasted into Microsoft Excel for additional manipulation of the data.
To convert a column to scannable barcode:

1. Open the Microsoft Excel document.
2. Insert a column next to the column to be converted.
3. Go to the first line of the new column where there is data to be converted (usually line 2).
4. Type the following: =concatenate("**",C2,"**")
   Note: This example assumes that column C is the column to be converted; use appropriate column and row number.)
5. Change the font in the cell to CarolinaBar-E39-2.5-22x158x720.
6. Copy the contents of this cell into the remaining cells in the column.
Unit 4: Using Scheduled Reports

Scheduled reports are produced through the LINCC Reports Service (LRS) available from FLVC’s web site or through the LINCC Task Manager, depending on the nature of the report. Some reports on the LRS are available in Adobe PDF, Microsoft Excel, and text file formats.

Lesson 1: Understanding Data in Database Usage Reports

Several scheduled reports are described in this lesson.

L009: SFX/Metalib Statistics

L009 contains statistics about the number of Requests and Clickthroughs logged by each college. The report is generated monthly and annually.

An example of the report is shown below. Requests (1) are connections to SFX. Clickthroughs (2) are the number of times menu options are selected within SFX. The percentage of Requests where a user selects a menu option (3) and the Service Types for Requests are reported (4).

<table>
<thead>
<tr>
<th>L009 - SFX/Metalib Statistics</th>
<th>Jul-13</th>
<th>Aug-13</th>
<th>Sep-13</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Seminole</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SFX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requests¹</td>
<td>5,950</td>
<td>1,071</td>
<td>6,459</td>
</tr>
<tr>
<td>Clickthroughs²</td>
<td>4,999</td>
<td>844</td>
<td>5,206</td>
</tr>
<tr>
<td>% Clickthroughs³</td>
<td>84.02%</td>
<td>78.80%</td>
<td>80.60%</td>
</tr>
<tr>
<td>Service Types⁴</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>getAbstract</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getAuthor</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getCitedJournal</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getCitedRecord</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getDocumentDelivery</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getFullText</td>
<td>4973</td>
<td>842</td>
<td>5184</td>
</tr>
<tr>
<td>getHolding</td>
<td>10</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>getSubject</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getTOC</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>getWebSearch</td>
<td>11</td>
<td>2</td>
<td>18</td>
</tr>
<tr>
<td>Total</td>
<td>4,999</td>
<td>844</td>
<td>5,206</td>
</tr>
<tr>
<td><strong>Metalib</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4,739</td>
<td>954</td>
<td>3,240</td>
</tr>
</tbody>
</table>
Project COUNTER and FLVC Database Usage Reports

Counting Online Usage of NeTworked Electronic Resources (COUNTER), launched in 2002, is an international initiative, or protocol, to create acceptable global standards for database usage statistics.

The COUNTER website states that “COUNTER’s objective is to ensure that vendor online usage reports are credible, compatible and consistent. This is achieved through the publication of Codes of Practice that specify the content, format, delivery mechanisms and data processing rules for a set of core usage reports that are easily implemented by vendors and easily understood by librarians” (http://www.projectcounter.org/faqs.html).

FLVC retrieves COUNTER usage statistics whenever they are available and uses the data, with vendor usage reports, in reports L010, L011, L012 and L013. COUNTER-compliant vendors are noted on the usage statistics reports.

Presently, two COUNTER reports are used in FLVC’s statistics worksheets, the Database Report1 (DB1, Total Searches and Sessions by Month and Database) and the Book Report 1 (BR1, Number of Successful Title Requests by Month and Title). While there are other COUNTER reports, most notably the Journal Report (JR1, Number of Successful Full-Text Article Requests by Month and Journal), only DB1 and BR1 are used at this time.

The COUNTER JR1 report has the widest adoption among vendors. It is also the initial report used in the development of the Standardized Usage Statistics Harvesting Initiative (SUSHI). FLVC has been a participant in the early stages of SUSHI and continues to monitor development of this standard. In the future, reporting will be expanded to include JR1 reports.

When COUNTER data is not available, FLVC uses the vendor usage report that most closely approximates COUNTER data.

L010: Vendor Statistics – College Searches

L010 provides the number of database searches by month and by database for each college. Databases that are part of a statewide agreement are noted with the superscript “SW.” Subtotals are reported for both searches in databases with statewide agreements and “other” databases for each vendor. Cumulative totals of both statewide and other searches are provided when appropriate.

The L010 report contains totals for each month for each vendor, a statewide total, a grand total, and a cumulative year-to-date total for each vendor. The report is generated monthly and annually. COUNTER statistics are used when available.
**L011: Vendor Statistics – Statewide Searches**

L011 provides the number of database searches, by month and by database for all colleges statewide. Databases that are part of a statewide agreement are noted with the superscript "SW." Subtotals are reported for both the searches in databases with statewide agreements and “other” databases for each vendor.

Cumulative totals of both statewide and other searches are provided when appropriate. The L011 report contains totals for each month for each vendor, a statewide total, a grand total and a cumulative year-to-date total for each vendor. The report is generated monthly and annually. COUNTER statistics are used when available.

<table>
<thead>
<tr>
<th>Vendor Statistics - Statewide Searches</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Artstor</strong></td>
</tr>
<tr>
<td><strong>Columbia University Press</strong></td>
</tr>
<tr>
<td><strong>Consumer Reports</strong></td>
</tr>
<tr>
<td><strong>CQ Press</strong></td>
</tr>
<tr>
<td><strong>Ebsco</strong></td>
</tr>
</tbody>
</table>

**L012: eBooks Usage – College Title Requests**

L012 provides the number of successful title requests for eBook collections for each college. The values are separated and subtotaled by what is available in a statewide contract and “other” searches. The report contains totals for each month for each vendor, a statewide total, a grand total, and a cumulative year-to-date total for each vendor. The report is generated monthly and annually. COUNTER statistics are used when available.

**L013: eBooks Usage – Statewide Title Requests**

L013 provides the number of successful title requests for eBook collections for all colleges statewide. The values are separated and subtotaled by what is available in a statewide contract and “other” searches. The report contains totals for each month for each vendor, a statewide total, a grand total, and a cumulative year-to-date total for each vendor. The report is generated monthly and annually. COUNTER statistics are used when available.
**L019: LINCCWeb Primo Search Statistics**

L019 counts the number of searches in Primo. It reports on searches conducted from the Library search tab. The report contains totals for the month and is generated monthly.

<table>
<thead>
<tr>
<th>Tab Searched</th>
<th># of Searches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deep Search</td>
<td>32</td>
</tr>
<tr>
<td>Library Search</td>
<td>18,983</td>
</tr>
<tr>
<td>Other</td>
<td>4,226</td>
</tr>
</tbody>
</table>

**L030: Vendor Statistics – Statewide Full-Text Accessions**

L030 provides the number of database full-text accessions, by month and by database for all colleges statewide. L029, a college-specific report is also produced. Databases that are part of a statewide agreement are noted with the superscript “SW.” Subtotals are reported for both the databases with statewide agreements and “other” databases for each vendor. Cumulative totals of both statewide and other accessions are provided when appropriate. The report contains totals for each month for each vendor, a statewide total, a grand total and a cumulative year-to-date total for each vendor. COUNTER statistics are used when available.

This report can be used in conjunction with locally-collected data from local database licenses to understand usage trends. The traditional Search statistic has always been a questionable measure of a product’s usefulness, and discovery tools have made it possible to access material without generating Search statistics. This report is necessary to gauge the usefulness of each product based on the actual number of articles viewed.
L034: Vendor Statistics – Statewide Multimedia Accessions

L034 provides the number of database multimedia accessions by month and by database for all colleges statewide. L033, a college specific report is also produced. Databases that are part of a statewide agreement are noted with the superscript “SW.” Subtotals are reported for both the databases with statewide agreements and “other” databases for each vendor. Cumulative totals of both statewide and other accessions are provided when appropriate. The report contains totals for each month for each vendor, a statewide total, a grand total, and a cumulative year-to-date total for each vendor. COUNTER statistics are used when available.

Sort options include: Vendor, Statewide DBs, and Other DBs. The report can be used in conjunction with locally-collected data from local database licenses to understand usage trends. Certain non-traditional online products such as streaming video databases report multimedia accessions as the statistic for accession. These products have been broken out into a multimedia report since they cannot be compared to accessions in a full-text database product.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Locally owned</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alexander Street</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Ambrose Digital</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ambrose</td>
<td>8</td>
<td>22</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Ambrose Digital Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>85</td>
<td>515</td>
<td>156</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>777</td>
<td></td>
</tr>
<tr>
<td>FilmsOnDemand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Films On Demand</td>
<td>122</td>
<td>100</td>
<td>100</td>
<td>50</td>
<td>182</td>
<td>143</td>
<td>116</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>835</td>
<td></td>
</tr>
<tr>
<td>FilmsOnDemand Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>695</td>
<td>14,183</td>
<td>19,683</td>
<td>10,569</td>
<td>0</td>
<td>0</td>
<td>45,121</td>
<td></td>
</tr>
<tr>
<td>Kanopy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kanopy</td>
<td>17</td>
<td>178</td>
<td>24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
<td>261</td>
<td></td>
</tr>
<tr>
<td>Locally owned Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>17</td>
<td>178</td>
<td>24</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>45,121</td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>122</td>
<td>116</td>
<td>745</td>
<td>14,438</td>
<td>29,511</td>
<td>10,565</td>
<td>0</td>
<td>45,121</td>
</tr>
</tbody>
</table>
Lesson 2: Understanding Data in Interlibrary Loan Reports

As different transactions occur for each request in the LINCC Interlibrary Loan (ILL) module (such as when an item is shipped, received, or checked-in), the transactions are recorded, along with the date and time they occurred, in an events table. G001 and G002 report against this table for the transactions that occurred during the specified time period. Because of the protracted life cycle of an ILL request, the numbers will not necessarily add up for each month. For example, a request placed at the end of May will show as a new request in May, but it might not be shipped until June.

Reports G001 through G008 are available from the LINCC Reports Service website at https://staff.lincc.net/s/lrs.asp.

G001: ILL Lending Library Statistics

G001 counts transactions for the ILL library’s lending activity during the specified time frame. Each sublibrary’s transactions are listed, followed by the transaction totals for the college. The report is generated monthly and annually.

To read the report, first look at the list of sublibraries in the leftmost column. Each row lists a specific sublibrary which has sent a request to be filled. The columns in that row list specific transactions that have occurred for requests from that sublibrary. In the example shown below, the first row indicates that one request has been marked Returned by the requesting library, CCLCI. A few lines down, for requesting sublibrary HCLYA, one New request was received and one request was Filled. Totals for the transactions are listed at the end of each column. This report is available from the LRS website.

<table>
<thead>
<tr>
<th>Requesting Sublibrary</th>
<th>New</th>
<th>Cancelled</th>
<th>Unfilled</th>
<th>Expired</th>
<th>Filled Loan</th>
<th>Filled Copy</th>
<th>Returned</th>
<th>Average Days to Fill</th>
<th>Unfill Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCLCI</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CCLLC</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
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<tr>
<td>EBLYS</td>
<td>2</td>
<td>0</td>
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<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ECLLA</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>ESTRE</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>FELSO</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FELXK</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>GCLPA</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
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<tr>
<td>HCLBR</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HCLDA</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HCLLY</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HELSO</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CCLCI</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

All transactions occur during the date range specified at the top of the report. Since activity for a request can span the indicated date range, the numbers will not necessarily add up from month to month. For example, a request placed last month may have actually been returned this month; that request will not show up as a new request this month, but the return transaction will show on this month’s report.

The report lists campus and institution level statistics. The report first lists all campus statistics, followed by the totals for the institution.
Further explanation of the column headings on G001 is provided below:

- **Requesting Sublibrary:** Lists all libraries that have sent a new request or had a request acted upon during the specified time frame. The columns to the right list each time the specific action has been taken on the request(s) from that library.

- **New:** Lists the number of new requests received from each ILL unit during the specified time frame.

- **Cancelled:** Lists requests that have been cancelled by the library or the patron during the specified time frame. Borrowing libraries or their patrons may cancel a request after it has been sent, as long as the lending library has not yet answered the request.

- **Unfilled:** Lists requests that have been answered Unfilled during the specified time frame. The request may have been declared Unfilled manually or as a result of automatic processing (if no available items were located).

- **Expired:** Lists requests that have been automatically declared Expired. The lending library has three days to answer a request from the day it was received. If the request has not been answered in three days (using any answer type), the request will automatically be declared Expired so the borrowing library can move on to other potential suppliers.

- **Filled Loan:** Lists the number of Loan requests that have been filled for the borrowing library during the specified time frame. When the lending library ships the requested item in the ILL module, the transaction is counted here. Loaned items are items that are expected to be returned to the lending library, and are defined as such in the Requested Media field on the request.

- **Filled Copy:** Lists the number of Copy requests that have been filled for the borrowing library during the specified time frame. When the lending library ships the item in the ILL module, the transaction is counted here. Copies are items that are not expected to be returned to the lending library, and are defined as such in the Requested Media field on the ILL request.

- **Returned:** Lists the number of items that were returned by the borrowing library during the specified time frame.

- **Average Days to Fill:** Lists the number of days it took for the lending library to ship the requested item from the time the request was received. If the item was shipped the same day the request was received, the number is zero. If multiple items were shipped to the borrowing library during the specified time frame, the number of days for all requests is totaled and averaged (rounding to the nearest integer).

- **Average Unfill Days:** Lists the number of days it took for the lending library to answer Unfilled from the time the request was received. If the request was answered Unfilled on the same day the request was received, the number is zero. If multiple requests were answered Unfilled for the borrowing library during the specified time frame, the number of days for all requests is totaled and averaged (rounding to the nearest integer).

The total number of Filled Loans and Filled Copies is the number generally reported as the total number of filled ILL requests.
**G002: ILL Borrowing Library Statistics**

G002 counts transactions for the ILL library's borrowing activity during the specified time frame. Totals for each transaction are listed at the end of each column. Each sublibrary's transactions are listed, followed by the transaction totals for the college. The report is generated monthly and annually.

G002, like G001, lists partner sublibraries in the leftmost column. However, the college's own ILL units are listed first, offset by a few dashes in order to list the owning sublibrary of all New borrowing requests. The New column lists requests that have been placed during the specified time frame, and this column will only have numbers for the institution's ILL units which handle the processing of all new borrowing requests. After the institution's ILL units, other partner sublibraries that have been sent requests to be filled are listed. This report is available from the LRS website.

Further explanation of the column headings on G002 is provided below:

- **Sublibrary**: Lists the libraries to which a request has been sent. The columns to the right show what action has been taken on the request(s) at the lending library.

  The first entries at the top of the Sublibrary column are local campuses, for the purpose of listing the total number of new requests generated at each campus. Sublibraries are separated by dashes, and the only relevant column for them is the New column.

- **New**: Lists the number of new requests placed. There will only be numbers for the first row(s) of the Sublibrary column, which are the local campuses of the institution. The purpose of the New column is to list the total number of new requests created for each campus. The Total field at the bottom of the column represents the total number of new requests placed at the institution during the specified time frame.

- **Sent**: Lists the number of requests sent to the borrowing library during the specified time frame. It is possible to send the same request to multiple suppliers, so the total in this column will rarely match the total number of new requests.

- **Cancelled**: Lists requests that have been cancelled after being sent to the supplier. It is possible for the patron or the borrowing library to cancel a request after it has been sent to a potential supplier, if the potential supplier has not yet answered the request.

- **Unfilled**: Lists requests that have been answered Unfilled by the supplier during the specified time frame. The request may have been declared Unfilled manually or as a result of automatic processing (if no available items were located).

- **Expired**: Lists requests that have been automatically declared Expired at the supplier. Once a request has been sent to a potential supplier, the supplier has three days to answer the request. If the request has not been answered in three days (using any answer type), the request will automatically be declared Expired so the borrowing library can move on to other potential suppliers.
- **Filled Loan**: Lists the number of Loan requests that have been filled by the lending library during the specified time frame. When the borrowing library receives the requested item in the ILL module, the transaction is counted here. Loaned items are items that are expected to be returned to the lending library, and are defined as such in the Requested Media field on the ILL request.

- **Filled Copy**: Lists the number of Copy requests that have been filled by the lending library during the specified time frame. When the borrowing library receives the item in the ILL module, the transaction is counted here. Copies are items that are not expected to be returned to the lending library, and are defined as such in the Requested Media field on the request.

- **Returned**: Lists the number of items that were returned to the lending library during the specified time frame.

- **Average Days to Fill**: Lists the number of days it took to receive the requested item from the lending library from the time the request was sent. If multiple items were received from the lending library during the specified time frame, the number of days for all requests is totaled and averaged (rounding to the nearest integer).

- **Average Unfill Days**: Lists the number of days it took for the lending library to answer Unfilled from the time the request was sent. If the request was answered Unfilled on the same day the request was sent, the number is zero. If multiple requests were answered Unfilled for the borrowing library during the specified time frame, the number of days for all requests is totaled and averaged (rounding to the nearest integer).

The total number of new requests is the number generally reported as the New Request total for the institution during the specified time frame. The total number of Filled Loans and Filled Copies is the number generally reported as the total number of filled ILL requests.

**G005: ILL Requested Titles**

G005 lists titles that were requested through ILL more than twice during the specified time timeframe. The report is generated January 1st and July 1st, and is accessed under Monthly Reports. It is sorted by count and then by title. Use this report to identify gaps in the collection and assist in collection development. This report is available from the LRS web page.
G006: Cumulative ILL Lending Library Statistics

G006 is a fiscal year-to-date accumulation of the G001 report which counts lending library ILL transactions (New, Cancelled, Unfilled, Expired, Filled Loan, Filled Copy and Returned). It is sorted by Lending ILL Unit, Borrowing ILL Unit, and is generated monthly. This report is generated monthly and may be useful for surveys and accreditation. This report is available from the LRS web page.

<table>
<thead>
<tr>
<th>July 1, 2014</th>
<th>Cumulative ILL Lending Library Statistics at VCLEA</th>
<th></th>
<th>Average</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requesting</td>
<td>Sublibrary New Cancelled Unfilled Expired Filled Filled Returned Days to Fill Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sublibrary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BELCO</td>
<td>8</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>BELMB</td>
<td>5</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>BELSB</td>
<td>20</td>
<td>0</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>BELTY</td>
<td>4</td>
<td>0</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>BOLBE</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>CCCLI</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>CCLOC</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>DELEDA</td>
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<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>ECLCH</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>ECLCO</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ECLLE</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>EULKE</td>
<td>4</td>
<td>0</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

G007: Cumulative ILL Borrowing Library Statistics

G007 is a fiscal year-to-date accumulation of the G002 report which counts borrowing library ILL transactions (New, Cancelled, Unfilled, Expired, Filled Loan, Filled Copy and Returned). It is sorted by Borrowing ILL Unit and then Lending ILL Unit. This report is generated monthly and may be useful for surveys and accreditation. This report is accessed from the LRS web page.

<table>
<thead>
<tr>
<th>July 1, 2014</th>
<th>Cumulative ILL Borrowing Library Statistics at VCLEA</th>
<th></th>
<th>Average</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requesting</td>
<td>Sublibrary New Sent Cancelled Unfilled Expired Filled Filled Returned Days to Unfill Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sublibrary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----- VCLEA</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BELCO</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BELMB</td>
<td>0</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>BELSB</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>BELTY</td>
<td>0</td>
<td>8</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>BOLBE</td>
<td>0</td>
<td>12</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CCCLI</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CCLOC</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CULMA</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>DELEDA</td>
<td>0</td>
<td>6</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>ECLCH</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ECLLE</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>EULKE</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>
**G008: ILL Reasons for No**

G008 lists the reasons ILL requests were unfilled along with a count of how many times they were unfilled for the specified time. Note that the “Other” category combines transactions that were manually given a reason for No of “Other” when unfilled by library staff, and unfilled requests which were answered automatically by the unmediated handling job that found no available item at the lending library. It is sorted by ILL Unit and then Reason and is generated monthly and annually. This report is accessed from the LRS web page.

<table>
<thead>
<tr>
<th>ILL Unit</th>
<th>Reason</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>VCLEA</td>
<td>On hold</td>
<td>2</td>
</tr>
<tr>
<td>VCLEA</td>
<td>Other</td>
<td>5</td>
</tr>
<tr>
<td>**********</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ILL unit subtotal</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>VCLLA</td>
<td>Other</td>
<td>3</td>
</tr>
<tr>
<td>**********</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ILL unit subtotal</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>VCLOS</td>
<td>Other</td>
<td>8</td>
</tr>
<tr>
<td>**********</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ILL unit subtotal</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>VCLWE</td>
<td>In use on loan</td>
<td>3</td>
</tr>
<tr>
<td>VCLWE</td>
<td>Missing</td>
<td>3</td>
</tr>
<tr>
<td>VCLWE</td>
<td>Non Circulating</td>
<td>1</td>
</tr>
<tr>
<td>VCLWE</td>
<td>Not on shelf</td>
<td>2</td>
</tr>
<tr>
<td>VCLWE</td>
<td>On hold</td>
<td>1</td>
</tr>
<tr>
<td>VCLWE</td>
<td>Other</td>
<td>7</td>
</tr>
<tr>
<td>VCLWE</td>
<td>Policy problem</td>
<td>2</td>
</tr>
<tr>
<td>**********</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reports G009 through G014 are available from the Task Manager.

**G009: ILL Lending Located Report**

G009 lists new incoming ILL requests with the status of Located. The items are available on the shelf for lending. The report provides the lending library code, the borrowing library code, the request number and status, the media type, Open Date and Need before date. Use this report to get a count of daily lending requests. See G010 for detailed pull slips used to retrieve items from shelf. This report is available from the Task Manager.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BELPB</td>
<td>MDLIN</td>
<td>22254</td>
<td>Located</td>
<td>1604190</td>
<td>Film or Video recording (loan)</td>
<td>07/05/2014</td>
<td>07/10/2014</td>
</tr>
<tr>
<td>2</td>
<td>BELPB</td>
<td>PHLNO</td>
<td>22255</td>
<td>Located</td>
<td>166860</td>
<td>Printed (loan)</td>
<td>07/07/2014</td>
<td>07/21/2014</td>
</tr>
</tbody>
</table>

**G010: ILL Lending Located Pull Slips**

G010 outputs a file of pull slips for items with a status of Located. The items are available for lending to the requesting library. The slips provide Lending and Borrowing Library information, barcodes in scannable format, and shelf location information. The OCLC symbol is also provided for quick searching in the TBLC Delivery database to retrieve shipping address information.

Use these slips to retrieve the items from the shelf. Insert this slip into the book to ship it to the borrowing library. This report is available from the Task Manager.
**G011: ILL Lending Multiple Located Report**

G011 outputs a list of requests with the status of Multiple Located. Requests with the status of Multiple Located have matched on more than one possible title. The report provides the Lending Library code, the borrowing library code, the request number and status, the media type, Open Date, and Need Before date. In the Lending tab / Review node select Multiple Located.

Use this report to search for the request and then click the Locate button. A number of matching hits appears under the Bib Column. Click Locate and then review the matching titles that appear. Select the one that appears to match and click Select. If a title matches, use the pull slips in G012 to retrieve the item from the shelf and send the slip with the item. If none of the titles match, then answer Unfilled. This report is available from the Task Manager.

**G012: ILL Lending Multiple Located Pull Slips**

G012 outputs a file of pull slips for requests with the status of Multiple Located. Requests with the status of Multiple Located have matched on more than one possible title. The slips provide Lending and Borrowing Library information, barcodes in scannable format, and shelf location information. The OCLC symbol is also provided for quick searching in the TBLC Delivery database to retrieve shipping address information.

In the Lending tab / Review node select Multiple Located. Select the request and then click the Locate button. A number of matching hits appears under Bib Column. Click Locate and then review the matching titles that appear. Select the one that appears to match and click Select. If a title matches, use these pull slips to retrieve the item from the shelf and send the slips with the item. If none of the titles match, then answer Unfilled. This report is available from the Task Manager.

**G013: ILL Lending New-Staff Review Report**

G013 outputs a report which lists requests with the Status of New-Staff Review. Items with the status of New-Staff Review may have a note or other special instructions that require a staff member to review the request before Shipping the item or marking it Unfilled. The report provides Lending and Borrowing Library information, Open and Need by dates, and a Request number.

In the Lending tab / Review node, select New-Staff Review and then the Request Details tab in the lower pane. If you can comply with the Notes or other special handling instructions, print the pull slips in G014 or print the pull slip from the request by clicking on the Item tab in the lower pane. Use the pull slip to retrieve the item from the shelf and ship it with the item. If you cannot comply, then answer Unfilled. This report is available from the Task Manager.
G014: ILL Lending New Staff Review Pull Slips

G014 outputs a file of pull slips for items with the Status of New-Staff Review. Items with the status of New-Staff Review may have a note or other special instruction that require a staff member to review the request before Shipping the item or marking it Unfilled. The slips provide Lending and Borrowing Library information, barcodes in scannable format, and shelf location information. The OCLC symbol is also provided for quick searching in the TBLC Delivery database to retrieve shipping address information.

In the Lending tab / Review node, select New-Staff Review and then the Request Details tab in the lower pane. If you can comply with the Notes or other special handling instructions, use these slips to retrieve the item from the shelf and ship the slip with the item. If you cannot comply, then answer Unfilled. This report is available from the Task Manager.

Lesson 3: Understanding Data in Course Reserves Reports

Course Reserves reports are particularly useful at the end of the semester for maintaining the reserve room. Instructors can be notified regarding the items they have on reserve so they can decide whether to retain the items for the next semester. The reports also contain loan information which makes it easier for staff to identify items that may be returned to the circulation collection or completely withdrawn.

R004: Course Reserves Course Report

R004 lists all the courses in the reserve room at one campus. The items associated with each course are listed. The Transaction Count column contains the number of times a specific item circulated for the month. The report is generated monthly.

An item can be attached to more than one course. The Transaction Count column shows the total number of times the item circulated. The item barcode may be repeated in the report if it is attached to another course, and the same transaction number will appear next to the barcode (the system can only determine that an item was checked out, not the course for which it was checked out).

Two additional reports, R006 Course Reserves Title Report, and R007 Course Reserves Instructor Report, are very similar to R004, but are sorted differently – by title or by instructor. An example of R004 is shown below.

<table>
<thead>
<tr>
<th>Course Number</th>
<th>Title</th>
<th>Author</th>
<th>Call Number</th>
<th>Instructor</th>
<th>Item ID</th>
<th>Trans Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLE1101</td>
<td>Tricks of the trade, 02</td>
<td>Robertson [RESERVE]</td>
<td>Robertson, Margery</td>
<td>345010110124545</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Winning at work</td>
<td>Robertson [RESERVE]</td>
<td>Robertson, Margery</td>
<td>345010110124545</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>SPC100</td>
<td>Effective Decision-Making I</td>
<td></td>
<td>Jett, Lynette</td>
<td>129960-10</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Looking Out, Looking In</td>
<td>*</td>
<td>Jett, Lynette</td>
<td>3450101023455</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mastering public speaking</td>
<td></td>
<td>Jett, Lynette</td>
<td>3450101023455</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>VH-C Adapter</td>
<td>*</td>
<td>Jett, Lynette</td>
<td>3450101023455</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

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R005: Course Reserves Purge Report

R005 is intended for cleanup of course reserves. It lists all courses that have passed the expiration date specified in the course record. The report is generated monthly, but is most useful at the end of the semester. If materials cannot be withdrawn or returned to the shelf, and the course deleted, library staff can update the course expiration date to make it current.

An example of the report is shown below.

<table>
<thead>
<tr>
<th>Course Number</th>
<th>Title</th>
<th>Author</th>
<th>Call Number</th>
<th>Instructor</th>
<th>Item ID</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCI2021</td>
<td></td>
<td></td>
<td></td>
<td>Dewald</td>
<td>34561010759971</td>
<td>05/27/2006</td>
</tr>
<tr>
<td>SCI2035A</td>
<td></td>
<td></td>
<td></td>
<td>Illig</td>
<td>34561010759980</td>
<td>09/30/2006</td>
</tr>
<tr>
<td>SCI2071</td>
<td></td>
<td></td>
<td></td>
<td>Illig</td>
<td>34561010759955</td>
<td>09/30/2006</td>
</tr>
<tr>
<td>AMHL010</td>
<td>Reserve</td>
<td>Kennedy</td>
<td></td>
<td></td>
<td>34561010759138</td>
<td>05/27/2006</td>
</tr>
<tr>
<td></td>
<td>Reserves</td>
<td></td>
<td></td>
<td></td>
<td>34561010759245</td>
<td></td>
</tr>
</tbody>
</table>

Lesson 4: Understanding Data in Circulation Reports

A large variety of reports related to circulation activity are generated daily, weekly, monthly, and annually. Circulation reports that are frequently used by library staff are described in this lesson.

C015: Overdue Summary Notices

C015 is run at either the institution or campus level, as specified by the institution. It produces a file of overdue notices. All levels of overdue notices are included (1st, 2nd, 3rd). The text for the notices can be customized by institution. These notices are available in either print or email formats. If email notices have been implemented, three files will be generated. These files are available from the Task Manager.

- **C015_D_XXX_date_email_overdue-summary**: This is the file containing notices for patrons with email addresses. Click Print to email Notices.
- **C015_D_XXX_date_print_overdue-summary**: This is the file containing notices for patrons with no email address. Click Print to email Notices.
- **C015_D_XXX_date_ecopy_overdue-summary**: This is the file containing a backup print copy of the email notice file. These are the same notices that are contained in the email file. They are generated in privacy mailer format as a backup in the event that you receive a returned undeliverable email or experience other technical problems sending email. Click Print to email Notices.
C015: Lost Material Summary Notices

C015 is run at either the institution or campus level, as specified by the institution. It produces a file of lost (billing) notices. The Lost notice is the final notice. It is the act of generating the Lost notice that changes the Loan Status of the item to Lost. The text for the notices can be customized by institution. These notices are available in either print or email formats. If email notices have been implemented, three files will be generated. These files are available from the Task Manager.

- **C015_D_XXX_date_email_lost-material-summary**: This is the file containing notices for patrons with email addresses. Click Print to email Notices.
- **C015_D_XXX_date_print_lost-material-summary**: This is the file containing notices for patrons with no email address. Click Print to email Notices.
- **C015_D_XXX_date_ecopy_lost-material-summary**: This is the file containing a backup print copy of the email notice file. These are the same notices that are contained in the email file. They are also generated in privacy mailer format as a backup in case of a returned undeliverable e-mail or other technical problems with e-mails. Click Print to email Notices.

C015: Courtesy Notices

C015 is run at either the institution or campus level, as specified by the institution. It produces a file of nearly due notices. Most notices are generated three days before the due date, but the number of days before the due date that the notices are generated can be specified by the institution. The text for the notices can be customized by institution. These files are available from the Task Manager.

- **C015_D_XXX_date_courtesy_notices**: These notices are only available in email format. Click Print to email Notices. Patron records with no email address will not be sent a courtesy notice.

C040: Delinquent Borrowers

C040 lists all borrowers that are delinquent during the specified time frame and includes the amount of the outstanding fine, if there is one. A borrower is considered delinquent if they have any material past due during the specified time frame and/or the fine total is at least the minimum fine amount. The report is sorted by sublibrary, then borrower status, and then borrower name. This report is accessed from the LRS web page and the Task Manager.

The report can be customized to produce a list of patrons who owe over a certain amount specified by the library. (Contact the FLVC Help desk to change the minimum fine amount listed on the report.) The report is generated weekly and monthly.
C045: Fines Outstanding

C045 is generated monthly at the college level. It is sorted by sublibrary so library staff can print the section relevant to their sublibrary. The report provides a cumulative list of all patrons who have outstanding fines. The report can be used to place blocks or holds on a patron at the college business office to prevent the patron from registering or receiving transcripts, in accordance with college policy. This report is available from the LRS web page.

Many colleges place blocks on patrons only if they owe more than a specified amount. The default report lists all patrons who owe more than one cent. However, the report can be customized to produce a list of patrons who owe over an amount specified by the library. Specifying an amount will reduce the number of patrons listed on the report and will make it more relevant and easier to use. Contact the FLVC Help Desk to change the amount listed on the report.

An example of the report header is shown below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Student ID/Barcode</th>
<th>Borr.</th>
<th>Balance</th>
<th>Expiration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C066: Fines for Waiver Consideration

This report lists all borrowers who owe less than a specified amount. If no amount is specified, the report lists all borrowers who owe money. It is generated monthly and is sorted by sublibrary and then by borrower name. This report is available from the LRS web page.

It is the policy of some libraries to waive all fines under a certain amount once a year or once every few years. This report can be customized to list only fines under a certain amount so they may be considered for waiving. If the report amount is not customized, all fines will be listed. An example of the report header is shown below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Student ID/Barcode</th>
<th>Borr.</th>
<th>Balance</th>
<th>Expiration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
C068: Waived Fines

C068 lists fines waived during the specified time frame. The report, generated monthly, is sorted by date waived and includes patron ID, amount waived, and the LINCC username that performed the waive. This report is available from the LRS web page.

Occasionally, the report will list a waived fine with a Patron ID that begins with “SCR” and a Staff Account name that is either blank or belongs to someone who no longer works at the library. Information in the Reason column may include “Service Not Defined.” This generally occurs because a patron record has been deleted. The associated closed cash transaction is not deleted but the patron ID is “scrubbed,” resulting in a change to the patron ID which the system sees as an update. Thus, the cash transaction appears on the report for the month. These older waived transactions may be disregarded.

An example of a waived report which includes a scrubbed cash transaction resulting from a deleted patron record is shown below.

<table>
<thead>
<tr>
<th>August 1, 2007</th>
<th>Waived Fines at BOC50</th>
</tr>
</thead>
<tbody>
<tr>
<td>C068</td>
<td>From 07/01/2007 through 07/31/2007</td>
</tr>
<tr>
<td>PATRON ID</td>
<td>Amount Waived</td>
</tr>
<tr>
<td>SCR9DUGXBA4I</td>
<td>$4.50</td>
</tr>
</tbody>
</table>

C069: Cumulative Delinquent Borrowers

C069 lists patrons who owe money or have overdue books. The report is generated monthly but is a cumulative list of all delinquent patrons. The report can be used to follow up with the college business office to ensure that patrons who owe too much money are blocked. The report is also useful when a library requires all books to be returned at the end of the semester. This report is available from the LRS web page.

The report is generated for the college but is broken into sublibrary sections, which allows relevant sections to be printed. An example of the report header is shown below.

<table>
<thead>
<tr>
<th>April 1, 2007</th>
<th>Cumulative Delinquent Borrowers at MJCBR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>as of 03/31/2007</td>
</tr>
<tr>
<td>St at</td>
<td>Student ID</td>
</tr>
<tr>
<td>us Name</td>
<td>*Barcode</td>
</tr>
</tbody>
</table>

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Fines or overdue items may appear at the top of the report. These transactions are associated with the institution as indicated by XXX50 instead of a specific sublibrary code, such as MJCBR. These fines are not associated with a specific item. An example of the report header is shown below.

<table>
<thead>
<tr>
<th>April 1, 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>C069</td>
</tr>
<tr>
<td>Cumulative Delinquent Borrowers at MJCBR as of 03/31/2007</td>
</tr>
<tr>
<td>St at Name</td>
</tr>
<tr>
<td>Student ID</td>
</tr>
<tr>
<td>due Amount</td>
</tr>
<tr>
<td>Expired Date</td>
</tr>
<tr>
<td>*Barcode</td>
</tr>
</tbody>
</table>

When no item or title is associated, “No Bib Information” will be displayed in the 1. Active Cash tab of the Cash Transaction node. The item may have been moved to another record or withdrawn, or the fine may have been manually placed for services such as printing copying.

<table>
<thead>
<tr>
<th>1. Active Cash</th>
<th>2. Cash History</th>
<th>3. Cancelled Transactions</th>
<th>4. All Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibliographic Info</td>
<td>Description</td>
<td>Credit</td>
<td>Debit</td>
</tr>
<tr>
<td>No bib information.</td>
<td>Lost Item Processing</td>
<td>3.00</td>
<td>3.00</td>
</tr>
</tbody>
</table>

**C070: Active Loan Items Lost and Paid**

C070 lists loans that have a loan status of Lost and the associated cash transaction has either been Paid, Waived, or the associated item record could not be found. This report is generated monthly at the sublibrary level. Items that have been partially paid or waived will not be reported. This report is available from the LRS web page.

**To use C070 to withdraw items that have been lost and paid for:**

1. Retrieve the patron record using the Patron ID from the report.
2. On the Items menu, click Change Item Process Status and mark the item Withdrawn.
3. Select the loan from the patron’s Loans list and click Delete.

Items that have been lost and then paid for are not automatically removed from the patron’s list of loans when the lost bill is paid. Follow local policy regarding the length of time to leave the lost item on the patron record. If the item is found and returned, and the loan has been deleted and the item withdrawn, the system will not be able to automatically find and credit the cash transaction.

Staff may retrieve the patron record and manually create a credit to refund the payment, if it is the library’s policy to do so. An example of the report header is shown below.
Investigating Alert Entries

An “*Alert*” entry may appear under the Payment Type column on C070. An alert indicates that the system cannot determine whether the cash transaction has been paid. This may occur when the Lost item is an ILL record, or when the item record has been moved to another record or deleted and the cash record has no item information attached. Staff intervention is required to investigate the transaction.

To investigate an alert:

1. Retrieve the patron record using the Patron ID from the report.
2. Select the **Cash** node.
3. Check the amount of any transaction that has lists “No bib information” in the Bibliographic Info column to find the corresponding amount on the report.

4. Select the **Loans** node. Identify any lost items listed that have no corresponding title in the cash transactions. This is the correct title.

5. Delete the cash transaction and recreate it in the **Cash Transaction** node.

If there is a loan that corresponds to the cash transaction with no bibliographic information, the item record has been moved to another bib record and lost its link to the cash transaction.

If there is no loan that corresponds with the cash transaction, the loan may already have been deleted or it may be an older cash transaction converted from the previous library management system (i.e., DRA software-based).
D004: Request Expired on [date]
D004 is run daily for each campus and allows staff to identify expired holds that have been deleted automatically (i.e., hold requests that have passed the “last interest date”). This report provides item and patron information and is sorted by item barcode. Use this report to notify the patron that an outstanding request has expired and to determine whether the patron is still interested in the item. Use this report to evaluate the number of requests that become expired before being filled. A high number of expired requests may need investigation. This report is available from the LRS web page.

D007: Hold Request Slip
D007 is run daily for each campus and produces a file of hold request slips that detail available items for which there are outstanding requests. This report provides item information and patron information and is sorted by call number. Use this file of hold request slips each day to retrieve available items from the shelf to fill hold requests. This report is available from the Task Manager.

D008: Hold Request Not Available
D008 is run daily for each campus and produces a file of letters to inform patrons that requested items are not currently available. These hold requests are in Waiting status since the items are still on loan. When an item is returned, it will automatically be placed on hold for the requester. Use this report for troubleshooting when needed. It does not need to be accessed every day. This report is available from the Task Manager.

D009: Hold Shelf Report
D009 is generated weekly by campus and is a list of expired On Hold requests. These are items that have been on the hold shelf longer than the system allows. For most libraries, this is seven days. The number of days can be customized. Expired requests have been automatically deleted and the item has been automatically placed on hold for the next requester, if there is one. If a Next Requester is listed in the report, the patron should be notified that the item is now available. Automatic deletion and hold placement for the next requester is the default setting; this can be customized.

Use this report to identify items that can be returned to the circulating shelves. If an item does not have a next requester, but belongs to another campus, return it so it can be placed in-transit to the owning campus. If the item does have a next requester in D009, the item has automatically been placed On Hold for that patron. Do not enter the barcode in the Return activity tab. A Hold Request letter has been generated automatically by the system. If a Next Requester is listed in D009, refer to D010 for the Hold Request Letter that can be used to notify the patron. This report is available from the LRS web page and the Task Manager.

D010: Next Requester Letters
D010 is a generated weekly by campus and is a file of letters notifying the next requester that the requested item is now available for pickup. It is generated for patrons listed in Next Requester column of D009. Use the letters in this report to obtain contact information to notify a patron that an item is available. This report is available from the LRS web page and the Task Manager.
D011: Hold Delete Letters

D011 is generated weekly by campus and is a file of letters informing a patron that a hold request that was on the shelf has been deleted. This is for hold requests with On Hold status. It is generated for patrons listed in D009. Use this report to inform a patron that the item is being returned to circulation. This report is available from the LRS web page and the Task Manager.

D012: Hold Request – On Shelf

D012 is run daily for each campus and produces a list of hold requests that details available items for which there are outstanding requests. This report provides item information that includes the material requested, item barcode, call number, and collection. This report also provides patron ID and patron name. It is sorted by call number. Use this report in place of D007 Hold Request slips to retrieve requested items from the shelf. This report is available from the LRS web page and the Task Manager.

Lesson 5: Understanding Data in Items and Title Reports

This lesson provides examples of Items and Titles reports that are frequently used, as well as reports that are useful for record maintenance.

I007: New Items Added

I007 is run only for colleges not using acquisitions or not creating items with orders. It lists items added during the month based on the Open Date of the item record. It does not include items in the PER collection or items with an item process status of OI (Order Initiated) or OR (On Order). The report is sorted by sublibrary, which allows library staff to print the relevant section. The report is further sorted by material type and call number. The report is generated monthly and annually.

An example of the report is shown below.
I013: Count of Items Held

I013 is generated annually and provides a count of items held by all colleges during the fiscal year, excluding serials. The report is broken out by material, with totals for each college and a combined total for all colleges.

Material Types are listed below (not all material types apply to all libraries):

- **Paper Volumes**: BOOK, CHILD, FORGN, REFBK, PHMNB, VERTF, LESBK, NEWRE, PPRBK, NEWBK, SCORE, GOVD, SOFTC, PAMPH, ONDIS, PER
- **Cartographic**: MAP, GLOBE
- **Graphic**: MUMED, STMMF, GAME, PRINT, REALI, MODEL, SCULP, PICTR, ARTRE, TOYS, KIT, FLASH
- **Audio**: RECRD, AUDTP, CD, LP, CASS, AUDBK, LEISA, CDROM, SLTYP, TALKB, CDMUS, CDSPW, EMUS, LESAU, MP3CD
- **Video**: VIDEO, TRNSP, SLIDE, FLMST, SLFLM, EMMFM, FLMLP, PGMNM, VIDE, VIDQ, VIDDK, VHS, MEDIA, TVCS, VS, DVD, VS, VHSN, VHS, DVDLL, VIDVH, BLAR, VCD, VDRM, BD, LESDV, VIDE
- **Micro**: MICRO, MICFC, MICFM, MICCA
- **Electronic**: SFTWR, EBOOK, EAUBK, FLSCD, CDLEC, ELSUB
- **OnLine**: EGDOCC

An example of the report, listing the number of items held as of June 2006, is shown below.
I014: Count of Items Added

I014 is generated monthly and annually, and provides a count of items added during the month or the fiscal year. It excludes serial items. The report is broken out by category, with totals for each school and a combined total for all schools. The Open Date in the item record is used to determine when the item has been added.

Material Types are listed below (not all material types apply to all libraries):

- **Paper Volumes**: BOOK, CHILD, FORGN, REFBK, PHMNB, VERTF, LESBK, NEWRE, PPRBK, NEWBK, SCORE, GOVDC, SOFTC, PAMPH, ONDIS, PER
- **Cartographic**: MAP, GLOBE
- **Graphic**: MUMED, STMMF, GAME, PRINT, REALI, MODEL, SCULP, PICTR, ARTRE, TOYS, KIT, FLASH
- **Audio**: RECRD, AUDTP, CD, LP, CASS, AUDBK, LEISA, CDROM, SLDTP, TALKB, CDUS, CDSPW, EMUS, LESAU, MP3CD
- **Video**: VIDEO, TRNSP, SLIDE, FLMST, SLFLM, EMMFM, FLMLP, PGMNMA, VIDBE, VIQTQ, VIDDK, VHS, MEDIA, TVCRS, VHSCC, DVD, VHSCV, VHSDD, VHSLL, VIDVH, BLRAY, VCD, DMDRM, BD, LESD, VIDBE
- **Micro**: MICRO, MICFC, MICFM, MICCA
- **Electronic**: SFTWR, EBOOK, EAUBK, FLSCD, CDLEC, ELSUB
- **OnLine**: EGDOCC

An example of the report is shown below.
**I015: Items with Non-Numeric Price**

I015 lists items that have non-numeric characters in the Price field. The report is generated monthly and is sorted by sublibrary and then by title. Non-numeric characters appear when the record is created and incorrect data is inadvertently entered into the Price field in the item record. This occurs most often when the dollar symbol ($) is entered with the price. This is not necessary and will cause the system to be unable to read the field, resulting in errors in various reports, including the Value of Collection report.

An example of the report, displaying non-numeric characters, is shown below.

<table>
<thead>
<tr>
<th>Item Barcode</th>
<th>Title</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>33201012205360</td>
<td>Barn burning</td>
<td>264.41/11</td>
</tr>
<tr>
<td>33201012205204</td>
<td>The blue hotel</td>
<td>264.41/11</td>
</tr>
<tr>
<td>33201012157926</td>
<td>The measure of a man</td>
<td>$ 25.95</td>
</tr>
</tbody>
</table>

**I016: High Priced Items**

I016 lists items that have a price higher than the college’s threshold. The default threshold is $2,000. Libraries may want to change that default if they routinely have items, such as laptops, that are priced at $2,000 or higher. This report is generated monthly and is sorted by sublibrary and then by title.

An example of the report, displaying several high prices, is shown below. High prices will affect the Value of Collection report.

<table>
<thead>
<tr>
<th>Item Barcode</th>
<th>Title</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>34201011097585</td>
<td>Current occupational &amp; environmental medic</td>
<td>1,383,909.00</td>
</tr>
<tr>
<td>34201011071697</td>
<td>Fool me once /</td>
<td>1,334,289.00</td>
</tr>
<tr>
<td>34201010653149</td>
<td>The Catholic Church /</td>
<td>1,267,204.00</td>
</tr>
<tr>
<td>34201011031485</td>
<td>The poems of Dylan Thomas /</td>
<td>1,093,188.00</td>
</tr>
<tr>
<td>34201000295976</td>
<td>Typical Japanese cooking /</td>
<td>3,200.00</td>
</tr>
</tbody>
</table>
**T004: Title Count Summary by Campus**

T004 counts titles at the campus level. The report is generated monthly and annually. A title will be counted once for each campus that it resides in, such that a single title would be counted once for each campus in the following scenario:

- SSCOR Book
- SSCOR DVD
- SSPCA Book
- SSPCA CD

An example of the report, listing the number of titles held by each campus, is shown below.

<table>
<thead>
<tr>
<th>Library</th>
<th>Count of Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td>MJCBR</td>
<td>52,406</td>
</tr>
<tr>
<td>MJCEB</td>
<td>4,070</td>
</tr>
<tr>
<td>MJCVE</td>
<td>21,719</td>
</tr>
<tr>
<td>SPCSA</td>
<td>1</td>
</tr>
</tbody>
</table>

**Correcting Erroneous Data**

Titles not belonging to the library may appear on the T004 report, such as the one for SPCSA shown above. This usually occurs when the item record is attached to the wrong holdings record.

**To correct erroneous data:**

1. Run an **Items GRF**, retrieving by the incorrect sublibrary.

   ![General Retrieval Form](image)

2. The problem record(s) will be listed on the report. Use the barcode to retrieve the record.
3. Unlink the item from the holdings record.
4. Change data on the item record as necessary, including sublibrary.
5. Create a new holdings record and edit the holdings record as necessary.
T030: eBooks Title Report

T030 provides a listing of the eBooks in the XXXEB collection of a school. The report includes the system number, call number, title, author, and publication date of the eBook. It is sorted by call number and is produced monthly. A statewide report, T031, is also produced monthly. An example of the report is shown below.

<table>
<thead>
<tr>
<th>System Number</th>
<th>Ebook ID</th>
<th>Call Number</th>
<th>Title</th>
<th>Author</th>
<th>Pub Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>001364118</td>
<td></td>
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Lesson 6: Understanding Data in Serials Reports

This lesson provides an example of a commonly used scheduled serials report.

S016: Serials Holdings

S016 is generated monthly as a campus-level report. It lists all serial titles held by the campus, based on whether the bibliographic record is a serial record. The titles are sorted alphabetically. All data from the corresponding items records and summary holdings fields in the holdings record (866, 867, 868) are reported. Since the report is based on the bibliographic record being a serial type record, the holdings will include titles in collections other than PER, such as REF or CIRC. Saving this report as a Microsoft Excel spreadsheet allows data to be sorted to meet local needs.

An example of the report showing holdings for MJCBR as of April 2007 is shown below.
Lesson 7: Understanding Data in Acquisitions Reports
This lesson provides an example of a commonly used scheduled acquisitions report.

A025: Orders by Selector
A025 is generated monthly. It lists all orders with a status of SV (Sent to Vendor) or CLS (Closed) that have an order date within the time frame specified on the report, if the Initiator ID field has been completed. The report is sorted by sublibrary, then by Initiator Name, and then by Title under each initiator name.

An example of the report is shown below.

```
September 2, 2007
A025
orders by selector at MCEX since 08/21/2007

******************************************************************************
 *                                    *
 * List of orders by each Selector, including the library note from the order. *
 * Only orders with a status of SV or CLS and with an Initiator Name are listed. *
 *                                    *
******************************************************************************
Initiator  Title  Order #  Note
-----------------------------------------------------------------------------
```
Unit 5: Requesting a Report

Lesson 1: Requesting Cleanup Reports

FLVC has found that it is sometimes necessary for library staff to review particular ranges or sets of bibliographic or administrative data in order to improve the effectiveness of the database or the efficiency of retrieval. Cleanup reports are typically designed for and useful to only a specific campus and/or specific project and cannot be added to the LRS or the LINCC client because they are of limited usefulness statewide. Nonetheless, cleanup reports can be quite helpful in solving a number of issues, and are available to LINCC libraries upon request.

Examples of cleanup reports include:

- Obtaining a list of periodical items with numbers of fiche recorded in notes fields to construct number of microfiche and microfilm reels.
- Obtaining a list of items with subfield $k$ preceding the call number.
- Obtaining a list of items with no linked holdings record.
- Obtaining a list of items with call number types not equal to 0.

If you have a particular cleanup need, please contact FLVC to discuss your project.
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Appendix: LINCC Documentation and Help

Documentation for LINCC is extensive and almost exclusively online. The following resources are available to assist you with questions related to specific module functionality or procedures.

**LINCC Manuals:** LINCC manuals cover the basic functionality of LINCC modules and provide screen shots and simple, step-by-step instructions. Module-specific LINCC manuals are distributed during each on-site training session. Updated versions are available online from the FLVCLearn web page.

**Online Help:** FLVC has developed extensive online help to assist library staff in performing LMS-related activities that are unique to LINCC. This help is available online from FLVC’s Library Staff Resources web site.

**Module Help:** Almost every screen or window in each module contains a Help menu and a Help option that lead to a description of each field. In addition, a Help icon on the Menu bar allows users to search module-specific help.

**Aleph Documentation:** Aleph’s vendor, ExLibris, provides additional print documentation that includes general information about Aleph implementation. For more information on Aleph documentation, contact the Help Desk.

**Additional Resources:** Additional resources, in a variety of formats, are available on the FLVC State College Library Service’s web site. These resources include discussion lists, which provide additional information from FLVC and other LINCC users; *Linking to LINCCWeb*, which explains the process of developing URLs for LINCC-based products for local college web sites; equipment recommendations; the LINCC Reports Service (LRS); online help for SFX and MetaLib; and much more.

**FLVC Help Desk:** FLVC’s Help Desk is available during all hours of library operation to assist library staff with FLVC products and services. Contact the FLVC Help Desk by email at help@flvc.org or by phone at 877-506-2210 during regular business hours (8 a.m. to 5 p.m. ET), excluding holidays.