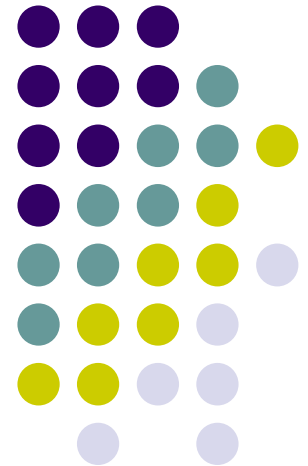
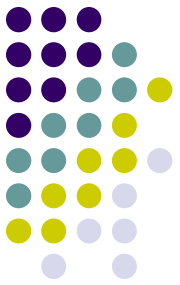


Reports in Horizon

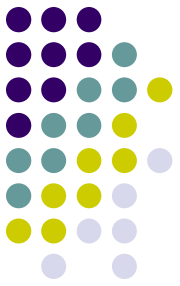
The Easy, the Difficult, and the
Nearly Impossible



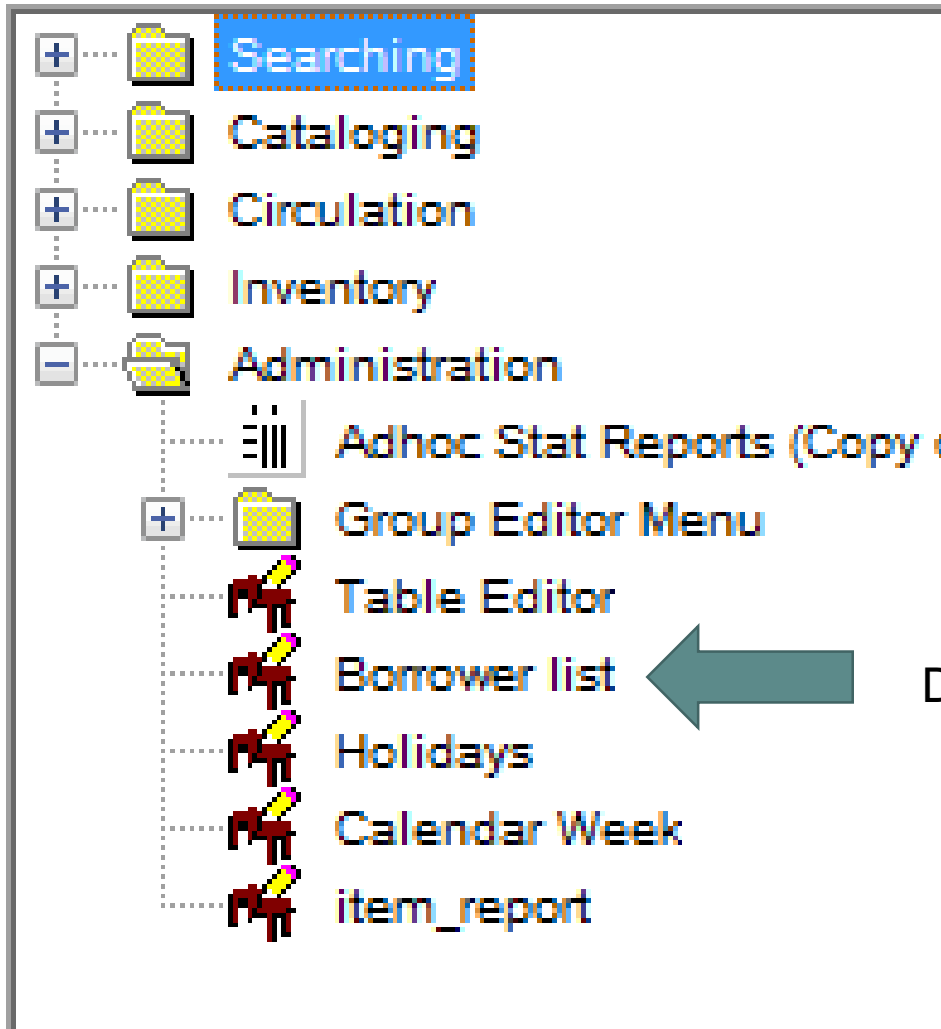
Easy Reports



- Item Report and Table Editor can answer many quick questions.
- For example: How many borrowers do I have?

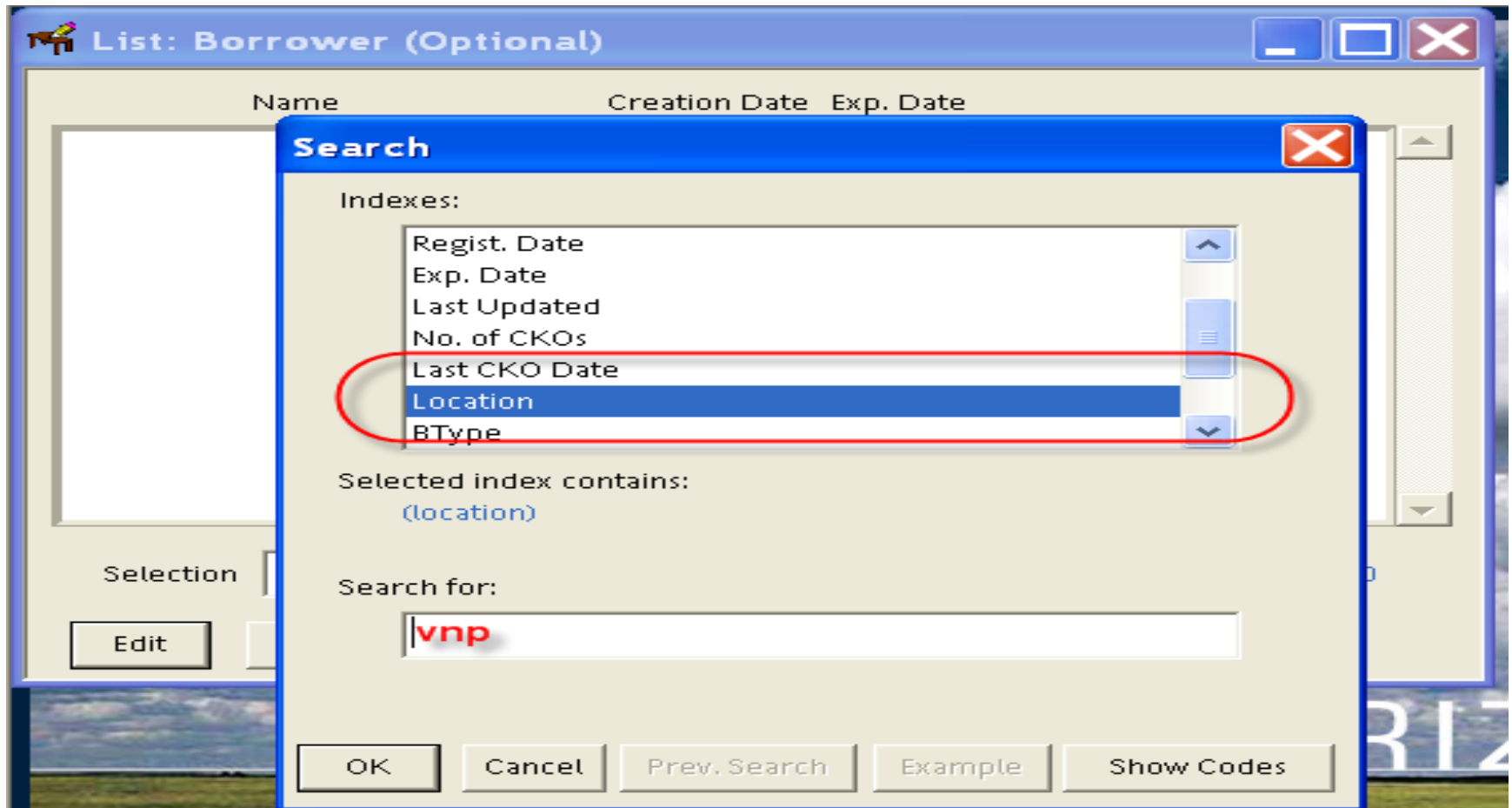
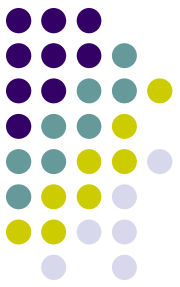


How many borrowers?

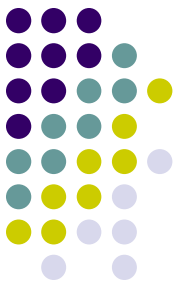


Double click on Borrower List

Highlight Location. Type in your location Code. Click OK.



Result is a list of borrowers at Malone. The total is given.



Name	Creation Date	Exp. Date
1. Aar	06/25/03	07/16/05
2. Aba	03/23/04	03/23/07
3. Aba	10/02/02	10/02/05
4. Aba	12/31/03	12/31/06
5. Aba	04/24/04	04/24/07
6. Abt	03/09/04	03/09/07
7. Ada	07/24/03	07/24/06
8. Adi	01/22/03	01/22/06
9. Afz	09/14/04	09/14/07
10. Agu	04/05/04	04/05/07
11. Agu	04/06/04	04/06/07
12. Agu	02/18/03	02/18/06

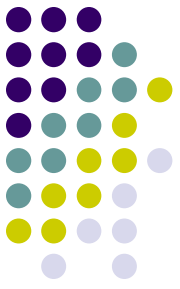
Selection

Total: 4895

Edit New Sort... Display...

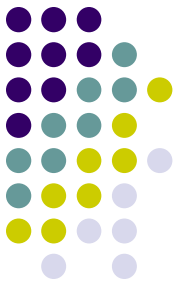
You can also display more columns with “Display” and sort the borrowers in a variety of ways with “Sort.”

More easy reports: To find out how many times an item has circulated...



- Search for the item (use f2 or “New Search” and drill down to the copy level.
- Click on “Detail Status” to see the # CKOs and other details
 - or
- Send it to the copy/item list
- Click Edit and page down to see the number of checkouts.

Example



The screenshot displays a library catalog interface with several overlapping windows:

- All Titles: topic of cancer**: The top-most window, showing search results.
- Bibliographic Detail**: A window showing the book's metadata, including the author (Miller, Henry, 1891-1980) and title (Tropic of Cancer / by Henry Miller).
- Copies**: A window showing a table of available copies. The first copy is highlighted in blue.
- Item Detail Status**: A pop-up window providing detailed information for the selected copy.

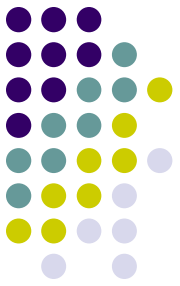
Copies Table:

Collection/Call No./Copy/Item Type/Status/Barcode	Owner/Location/Due Date
1. Fiction F/M Fiction	Malone Wead Library Checked In 38787101830394 VNP

Item Detail Status:

- Title: Tropic of Cancer /
- Location: vnp Malone Wead Library
- Collection: vnf VNP Fiction
- Call No.: F/M Copy No.:
- Barcode: 38787101830394
- IType: f Fiction
- Status: i Checked In
- Status Updated: 03/28/2014 No. of Checkouts: 9
- CKI Note:

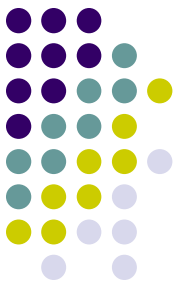
Buttons at the bottom: Close, Save, Page Up, Page Down, Page 1 of 7



Item_Report is Very Versatile

- + ... Searching
- + ... Cataloging
- + ... Circulation
- ... Administration
 - Adhoc Stat Reports (Co
 - Data Load Error Log
 - + ... Group Editor Menu
 - Table Editor
 - item_report**

The Compound Search Window

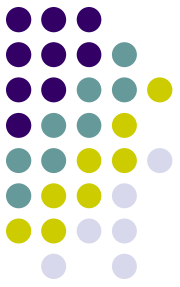


The screenshot shows a 'Compound Search' dialog box with the following elements:

- Indexes:** A list box containing 'Collection', 'Call No.', 'Copy', 'Barcode', 'Loc.', 'Owning Note', and 'Funding Note'. 'Collection' is selected.
- Selected index contains:** '(collection)'
- Search for:** An empty text input field.
- Logic:** Radio buttons for 'AND' and 'OR', with 'AND' selected.
- Buttons:** 'Clear Search String' and 'Append List' (with an unchecked checkbox).
- Search String:** An empty text input field.
- Action Buttons:** 'Search', 'Cancel', 'Prev. Search', 'Example', and 'Show Codes'.

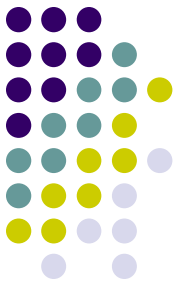
If it looks familiar, you probably remember it from the Item Group Editor.

Some good questions for Item_Report



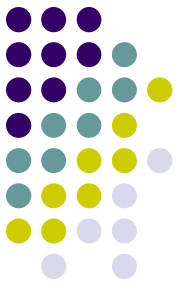
- Give me all the items in the CEF Large Print collection that were created before April 2004 and have not circulated at all.
- Show me all the items with status “missing” at my location and I’ll sort them by “last status update” to see the older ones.

More questions for Item_report

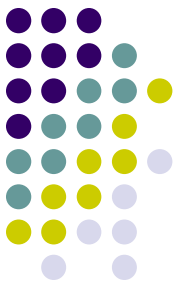


- Show me all the items at my location that are due today.
- Show me all the items that were due before last week and have not been returned, and who borrowed them.
- Show me all the items at my location with item type f7d that haven't circulated since May.
- I bet you can come up with some I haven't thought of that you can use.

Use Item_Report for a New Items List



Choose your location

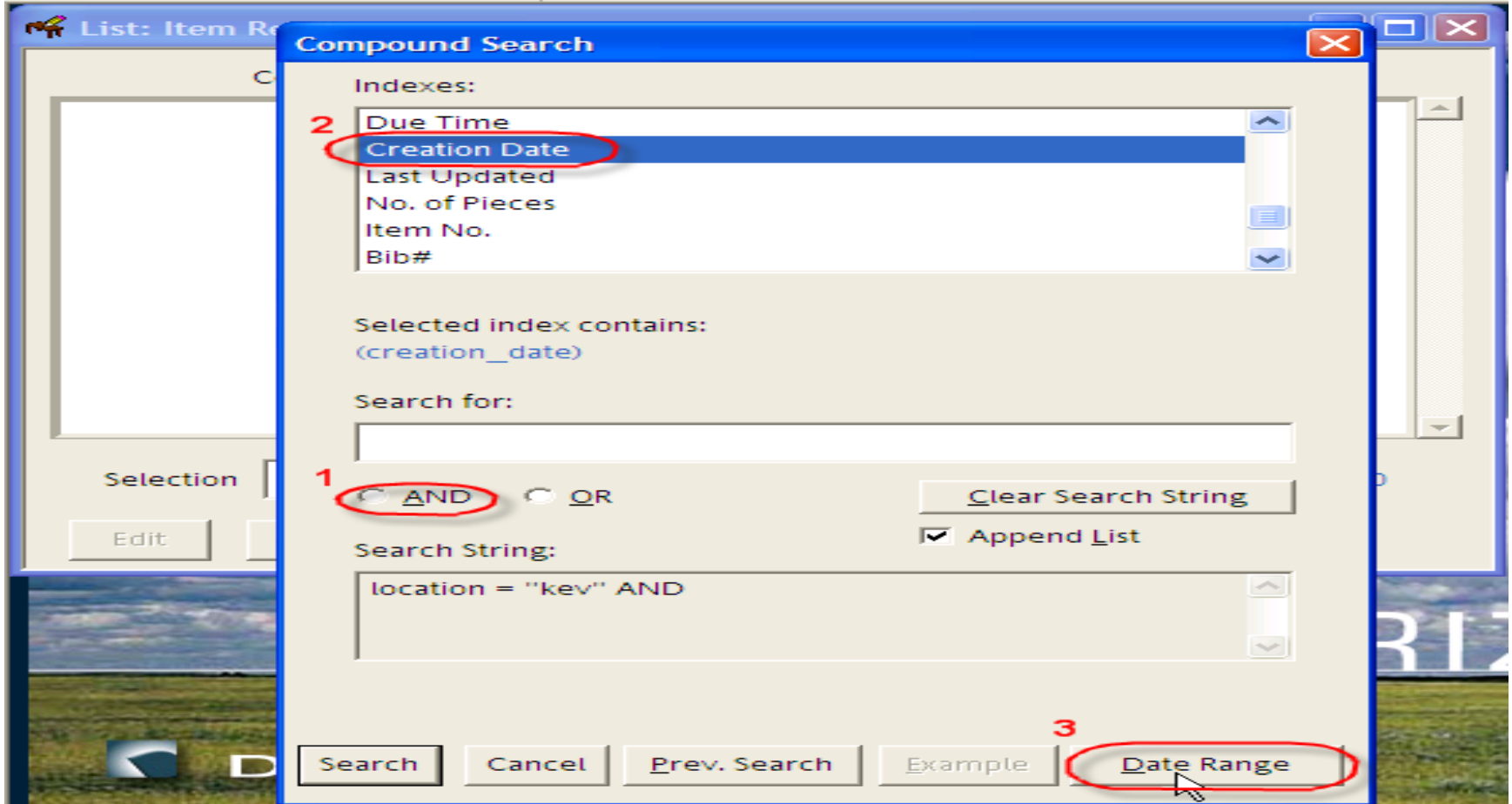
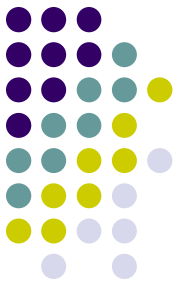


The image shows a screenshot of a software interface with a 'Compound Search' dialog box open over a 'List: Item Re...' window. The dialog box has a blue title bar and contains the following elements:

- Indexes:** A list box containing 'Collection', 'Call No.', 'Copy', 'Barcode', 'Loc.', and 'Owning Note'. The 'Loc.' item is highlighted with a blue background and circled in red.
- Selected index contains:** The text '(location)' is displayed below the list box.
- Search for:** A text input field containing the text 'kev', which is circled in red.
- Logic:** Two radio buttons labeled 'AND' and 'OR' are present, with 'AND' selected.
- Buttons:** A 'Clear Search String' button is located to the right of the search field.
- Search String:** A text area at the bottom of the dialog, currently empty.
- Checkboxes:** A checkbox labeled 'Append List' is checked.

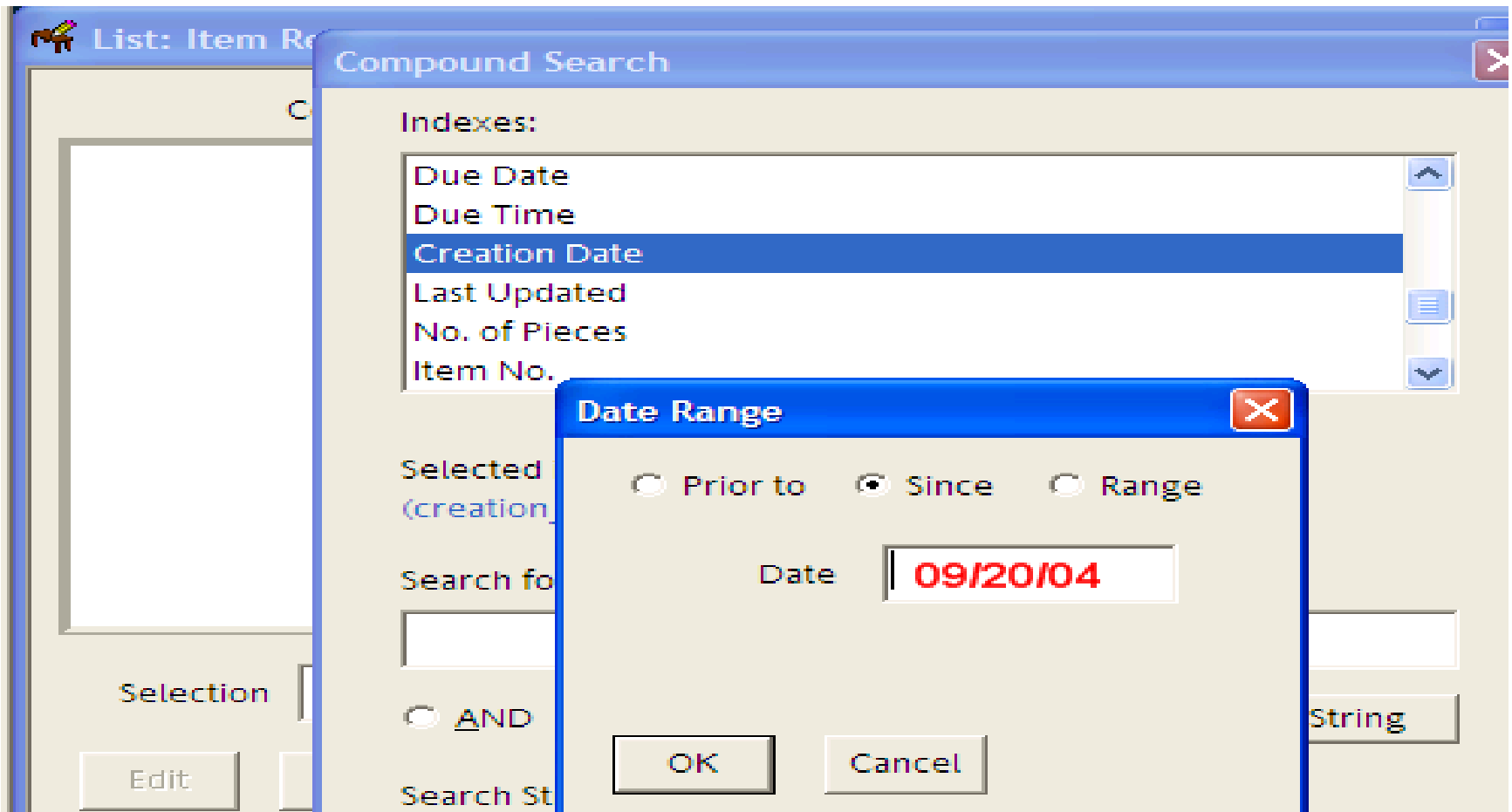
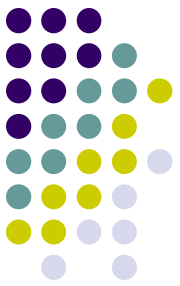
In the background window, a 'Selection' area is visible with an 'Edit' button.

Click “AND”, Highlight “Creation Date” and

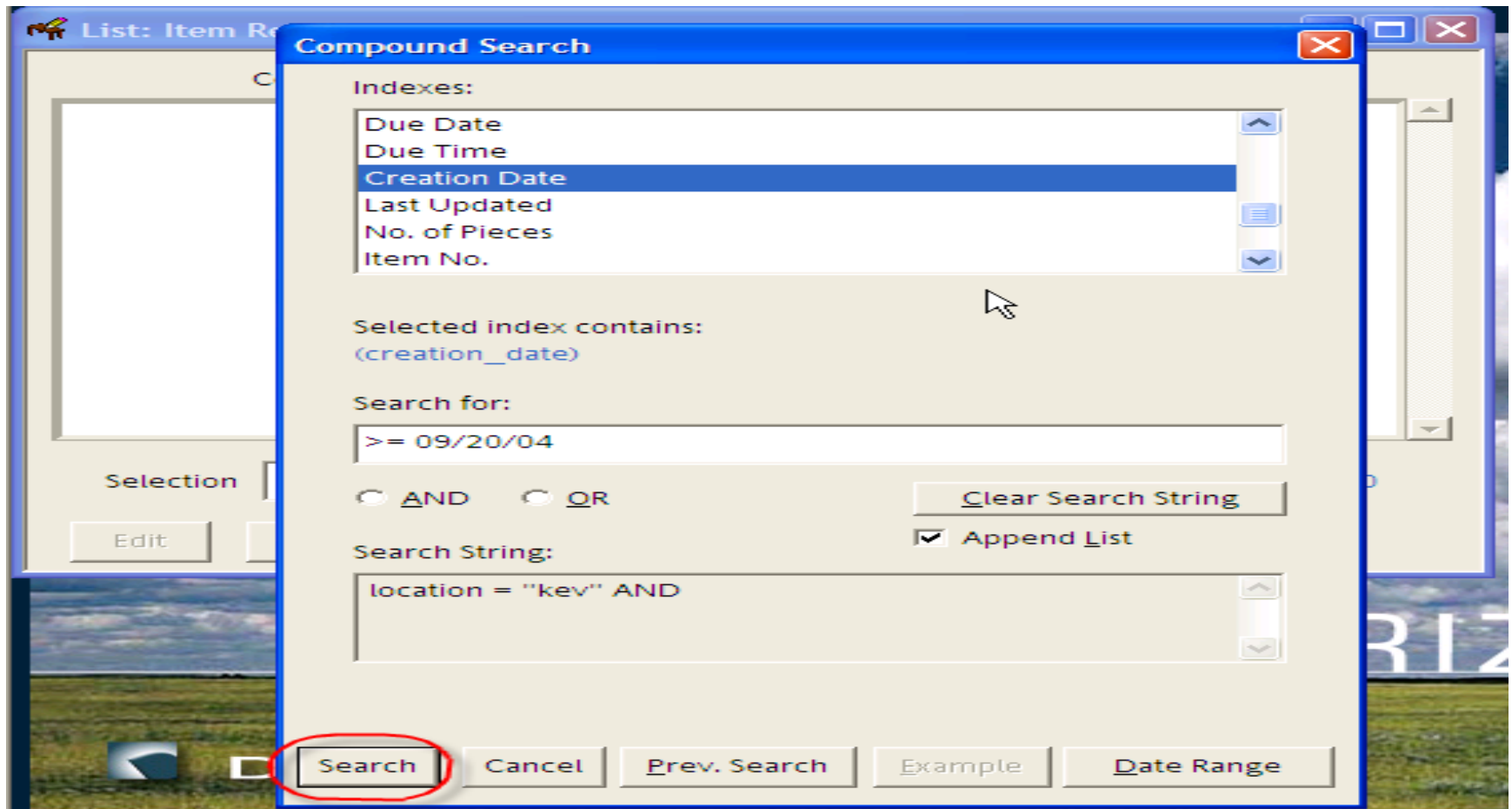
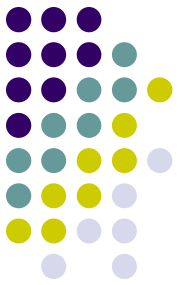


Click Date Range.

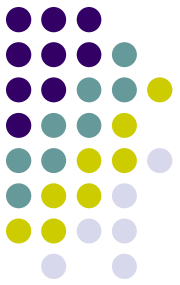
Enter a date, click OK.



Now click Search.



Close the search window



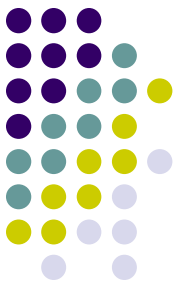
Collection	Title	Call No.	Item Status	Copy	Note	Barcode
1. kee	E SEU					38787021580723
	Did I ever tell you how lucky you are?				In Cataloging	
2. kee	E POT		undersize			38787021580624
	The tale of Tom Kitten,				In Cataloging	
3. kee	E POT		undersize			38787021580848
	The tale of Tuppenny.				In Cataloging	

Selection Total: 63

Edit New Sort... Display...

Use the Cancel button or the “X” to close it, then maximize the results window.

Click Display to choose columns to show.



5. kemys	MF LAN pa	38787021580939	In Cataloging
	Blind bloodhound justice /		
6. keunk	BOOK CD	38787050701703	Checked In
	I'm a stranger here myself [notes on returning to America after 20		
7. kemys	MF JOH	38787021580764	Checked out
	Blind alley /		
8. keacf	L3 BOOK AND book	38787021580426	In Cataloging
	The Titanic, lost-- and found /		

Selection

Total: 63

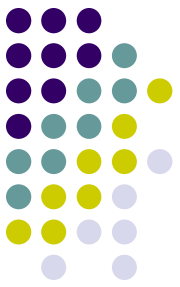
Edit

New

Sort...

Display...

Choose Call Number, Title, Item Type and Author



The screenshot shows a 'Display Options' dialog box with a blue title bar and a close button. It is divided into two main sections: 'Choose columns to display' and 'Display properties'.

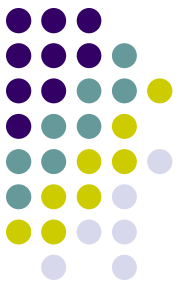
Choose columns to display: A list box containing the following items: Last Updated, No. of Pieces, Item No., Bib#, Call Type, Last Status Update, Used In-house, In-house Uses, and Author. The 'Author' item is currently selected and highlighted in blue. A mouse cursor is pointing at the 'Author' item.

Display properties: A sub-dialog box containing the following settings:

- Collection:** A dropdown menu with 'Collection' selected.
- Position:** A text box containing an empty field, with the text *not displayed* to its right.
- Width:** A text box containing the number '7', with the text *characters* to its right.
- Label:** A text box containing the text 'Collection'.
- Right justify:** An unchecked checkbox.
- Code:** Two radio buttons; the first is selected and labeled 'code', the second is labeled 'description'.
- Value:** Two radio buttons; the first is labeled 'short' and the second is labeled 'long'.

At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

Deselect others that may be highlighted. Then Click OK.



Now click Sort.

Vinton, John.			
8. MUSIC CD E	Earned these lines		cdm
Eyres, Peggy			
9. MUSIC CD B	Cloudsplitter		cdm
Eyres, Peggy and Berggren, Dan			
10. F FLA pa	Fried green tomatoes at the Whistle Stop Cafe /		f
Flagg, Fannie.			
11. CASS E	Close to the sun		acm
Eyres, Peggy			
12. VIDEO D	Dead Poets Society		v
13. VIDEO S	The silence of the lambs		v
Demme, Jonathan, 1944-			

Selection

Total: 63

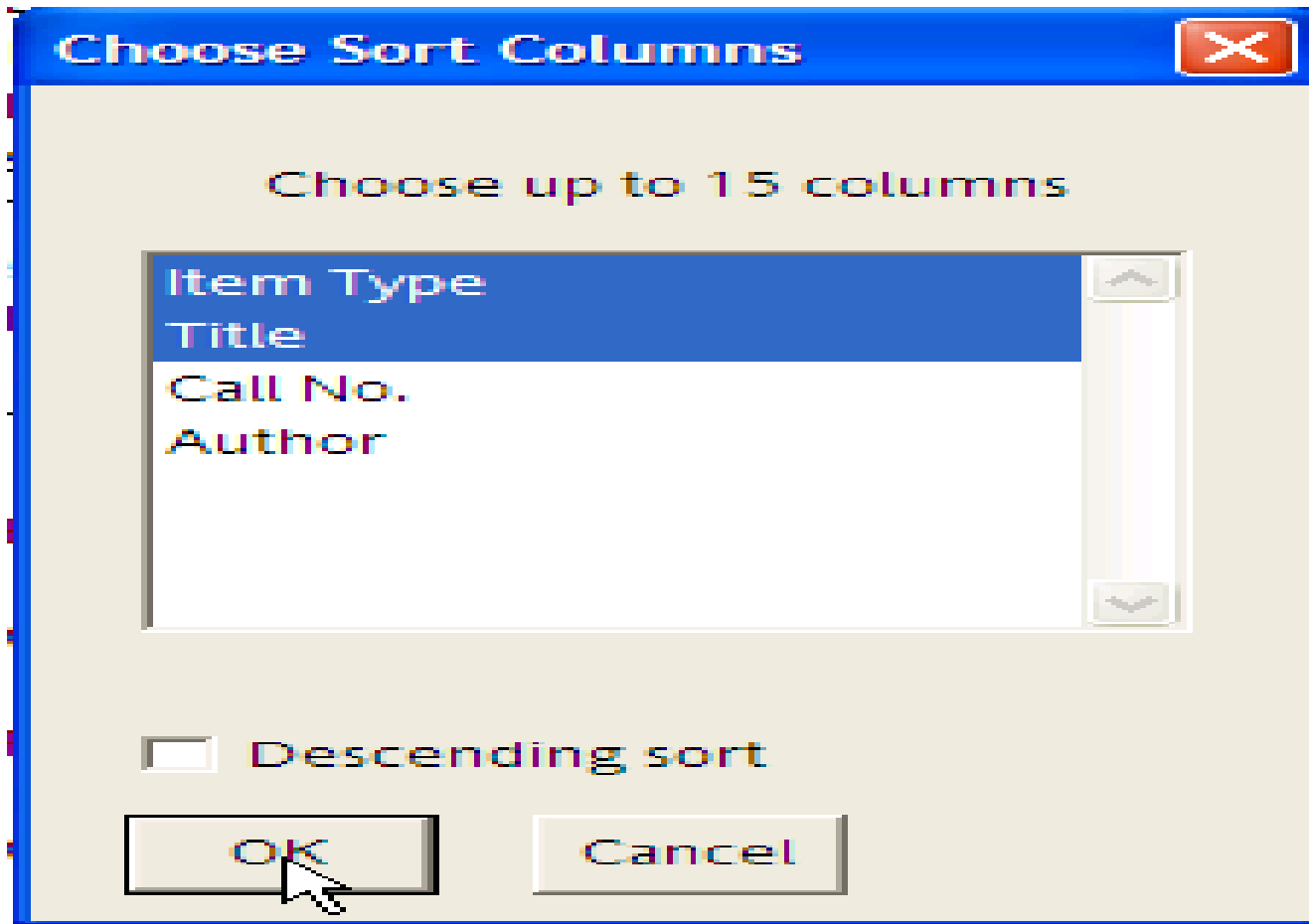
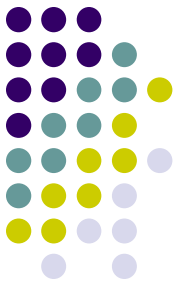
Edit

New

Sort...

Display...

Sort by Item Type, then Title



Click Ok.

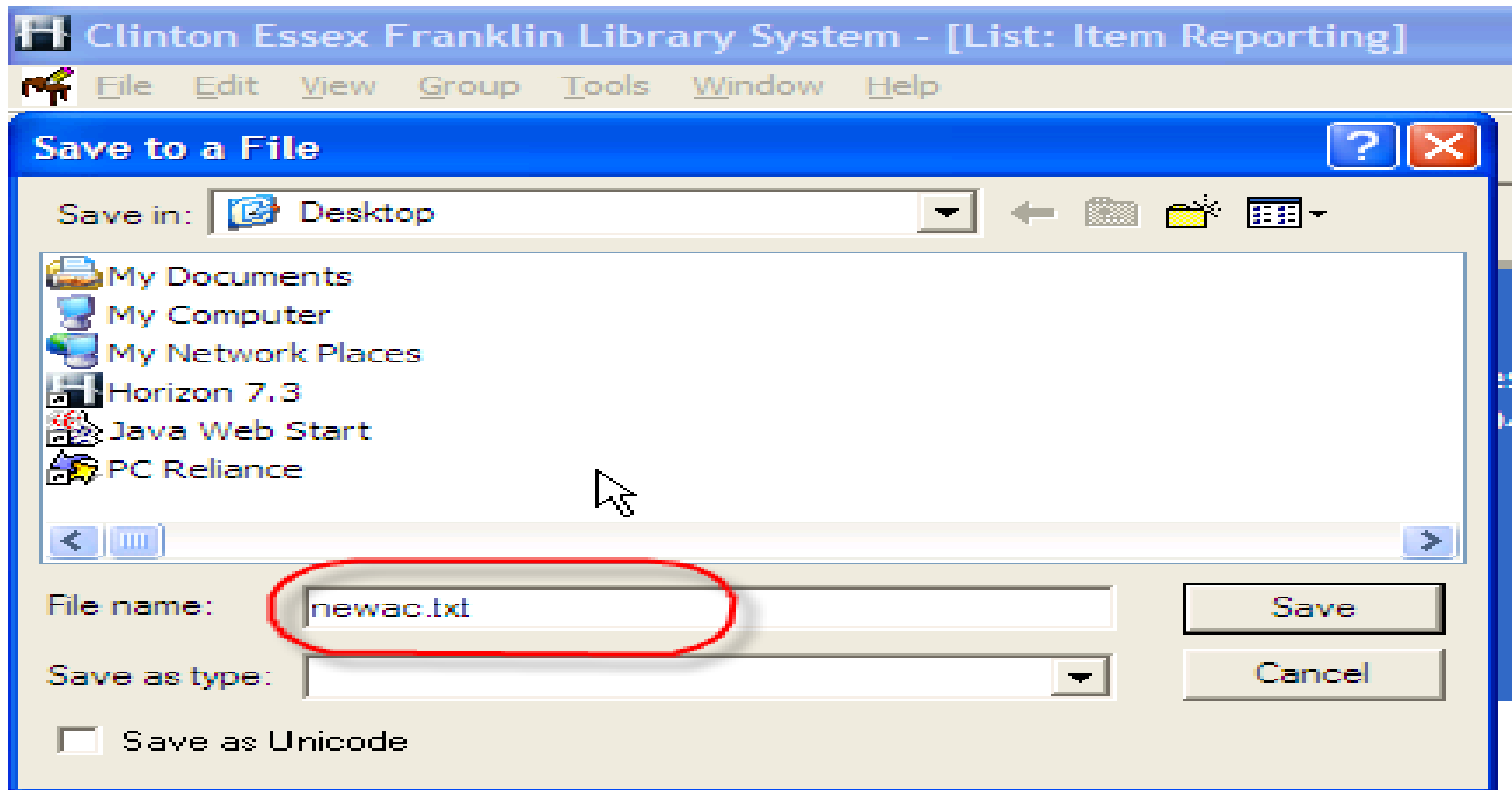
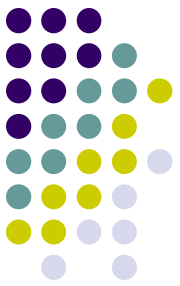
Select all the Audio Cassettes, then Click File, Export Records



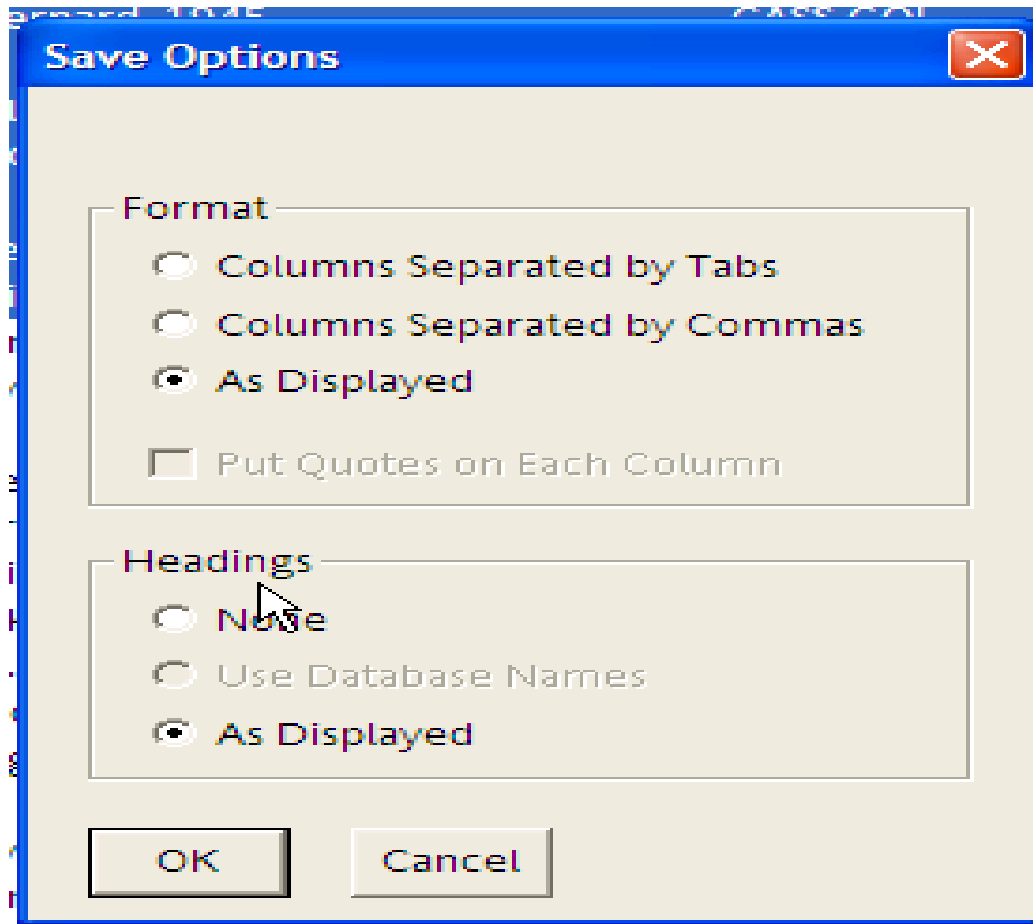
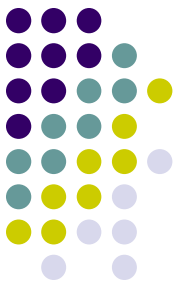
Title/Author	Call No.	Item Type
1. The edge Coulter, Catherine.	CASS COU	ac
2. Bias a CBS insider exposes how the media distorts the news / Goldberg, Bernard, 1945-	CASS GOL	ac
3. Killjoy Garwood, Julie.	CASS GAR	ac
4. On dangerous Ground Jack Higgins	CASS HIG	ac
5. Passing strange Ard, Catherine.	CASS HEY	ac
6. Close to the sun Eyres, Peggy	CASS E	acm
7. Bad business Parker, Robert B., 1932-	BOOK CD PAR	cd
8. Self matters [creating your life from the inside out] / McGraw, Phillin C. 1950-	BOOK CD MCG	cd

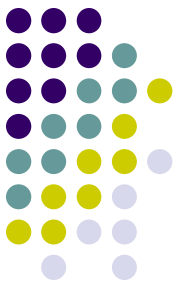
You can find the “Export Records” option in the File menu at top left in the menu bar of Horizon.

Choose a name and location for your file, and end it with .txt



Choose the default option, click OK





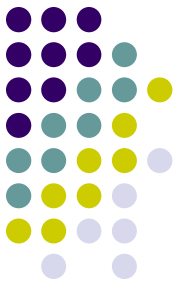
Find your file, double click

```
newac.txt - Notepad
File Edit Format View Help
where location = "kev" AND creation_date >= 12681

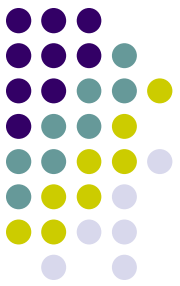
Title/Author                                Call No.                                Item Type
-----
The edge                                     CASS COU                                ac
  Coulter, Catherine.
Bias a CBS insider exposes how the media distorts the  ac
  Goldberg, Bernard, 1945-
Killjoy                                       CASS GOL                                ac
  Garwood, Julie.
On dangerous Ground                          CASS GAR                                ac
  Jack Higgins
Passing strange                              CASS HIG                                ac
  Aird, Catherine.
```

Here's a text file you can edit to show the new audiobooks at the library.

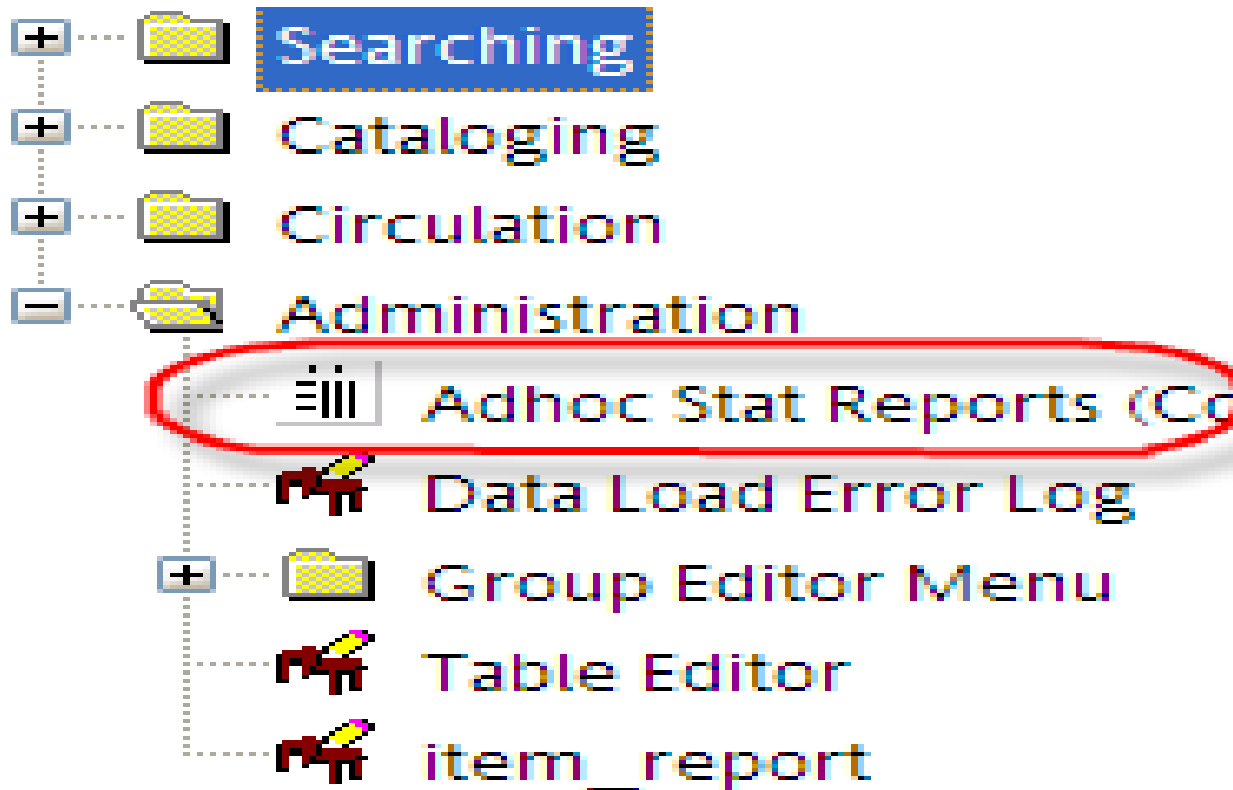
Ad Hoc Reports



- Easy to run, but slow and sometimes give you too much.
- You can save the file and give it a name with “.txt” on the end. This will let you open it in Notepad or Word, or even Excel or Access.
- After that, open it in your chosen program, and select only the data you want

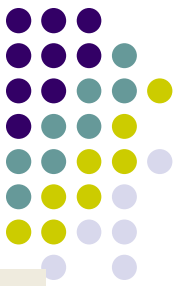


Running the Ad Hoc Reports



Double Click on the AdHoc Stat Reports Icon.

Choose Report Options



Choose a Report Type and one or more Locations

Report Type

- Daily Report - Circulation Details
- Daily Report - Cash Management
- Daily Report - Overview
- Monthly Report - Acquisitions Details
- Monthly Report - Circulation Details
- Monthly Report - Cash Management
- Monthly Activity Report - By Day-of-week

Locations

- akw - Akwesasne Library
- alt - Altona Reading Center
- aus - AuSable Forks Free Library
- bkm - CEF Bookmobile
- cef - Clinton Essex Franklin Library System
- cefm - CEF Media
- chm - Champlain Memorial Library

Date 09/24/2004

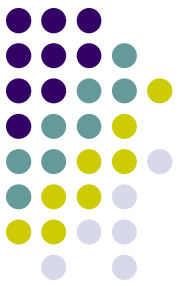
Print

Cancel

Save to File

About

Pick a report type on the left. On the right, the first location is highlighted by default, so you need to click on it to “un-highlight” it if you want just your location’s statistics. Then highlight your location. Finally, enter a date. The last day of any month is good.



Choose Output Options

Choose a Report Type and one or more Locations

Report Type

- Daily Report - Circulation Details
- Daily Report - Cash Management
- Daily Report - Overview
- Monthly Report - Acquisitions Details
- Monthly Report - Circulation Details
- Monthly Report - Cash Management
- Monthly Activity Report - By Day-of-week

Locations

- akw - Akwesasne Library
- alt - Altona Reading Center
- aus - AuSable Forks Free Library
- bkm - CEF Bookmobile
- cef - Clinton Essex Franklin Library System
- cefm - CEF Media
- chm - Champlain Memorial Library

Date

09/24/2004

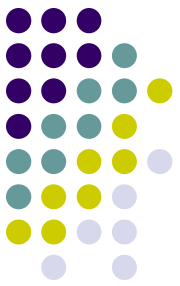
Print

Cancel

Save to File

About

I prefer to save to a file, then you can edit the report (and save paper!).



Example:

Choose a Report Type and one or more Locations

Report Type

- Monthly Report - Circulation Details
- Monthly Report - Cash Management
- Monthly Activity Report - By Day-of-week
- Monthly Activity Report - By Hour
- Monthly Report - Overview
- Monthly Report - Collection Snapshot**
- Monthly Report - Call Number Collection S

Locations

- vnp - Malone Wead Library**
- voa - Saranac Lake Free Library
- wad - Wadhams Free Library
- wch - Dodge Library West Chazy
- wlm - Wilmington E.M. Cooper Memorial L
- wpl - Waverly Public Library
- wpo - Westport Library Association

Date

08/31/2004

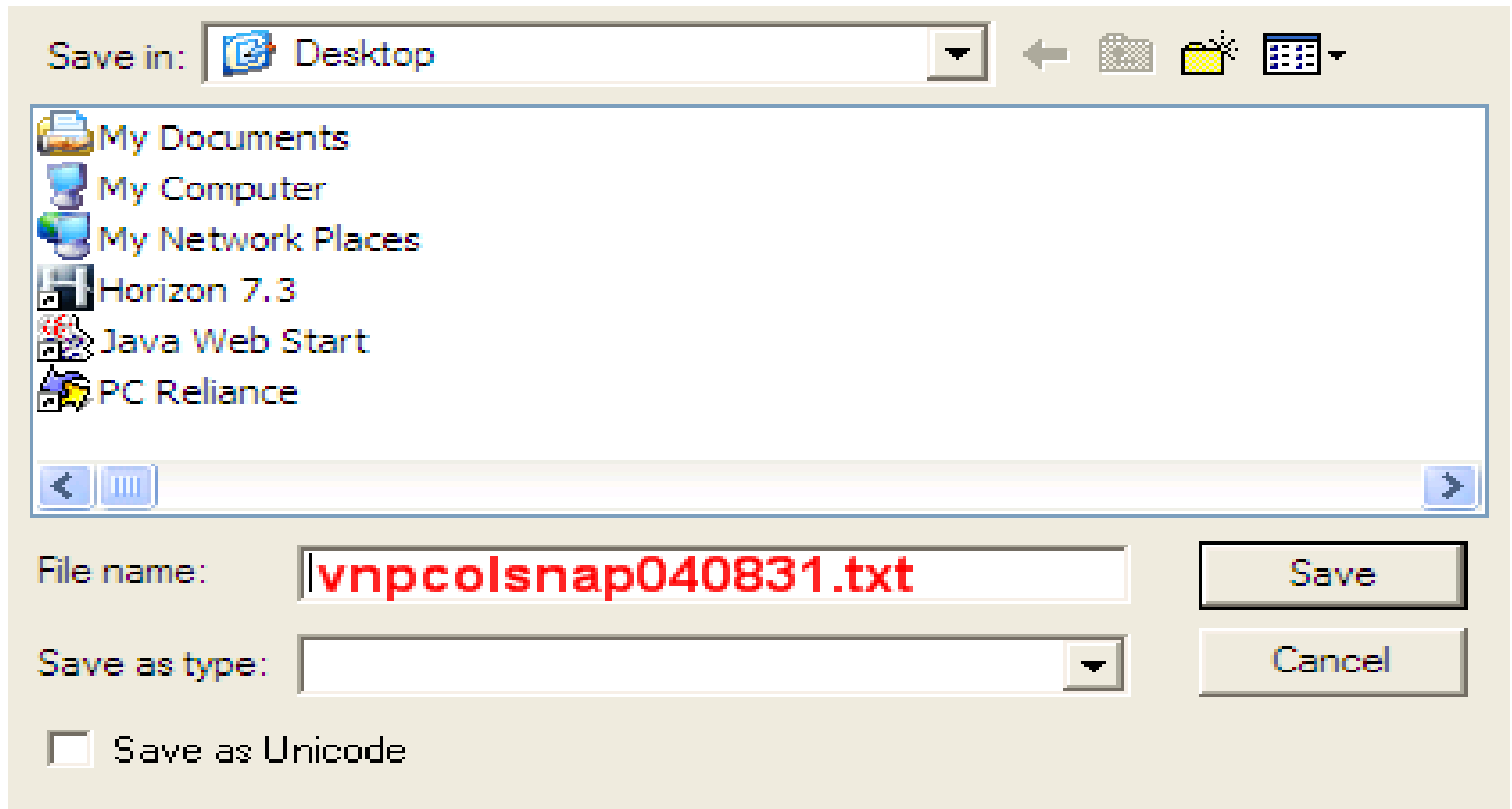
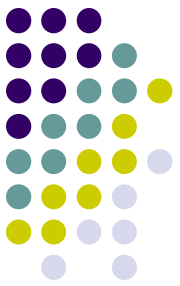
Print

Cancel

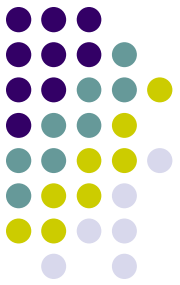
Save to File

About

Saving to a file:



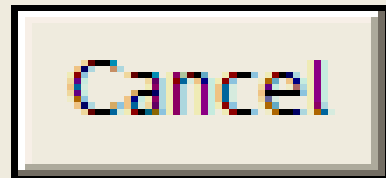
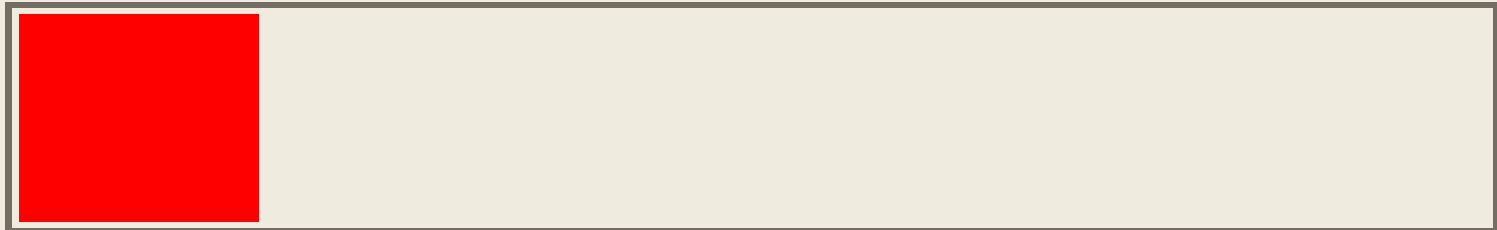
Click Save and the report will start to run. Remember where You saved it and its name!



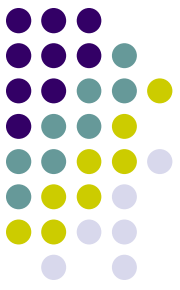
Report Generating

Report Generation in Progress

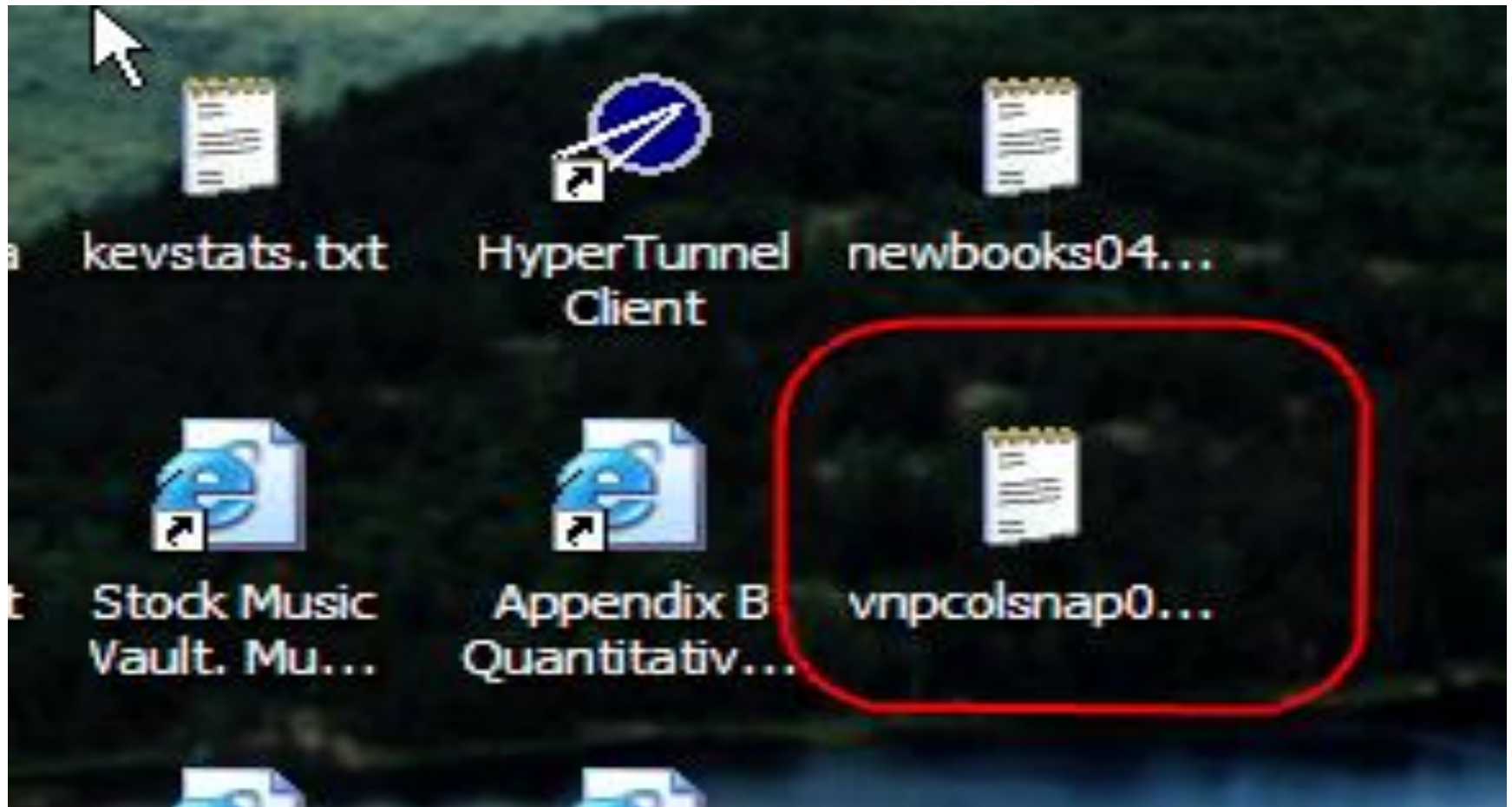
(Report for: Aug 2004)



This might take awhile. Time to get some coffee.

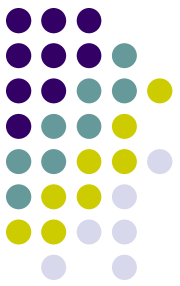


Find the report



There it is on my desktop.

If you double click....



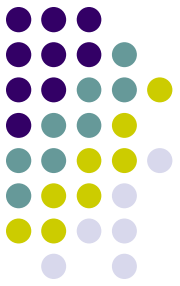
```
vnpcolsnap040831.txt - Notepad
File Edit Format View Help

Monthly Report - Collection snapshot for
-----
Locations on this report: Malone wead Library

Items: Coll. Istat
Description Aug 2004 Jul 2004 %chg Aug 2003 %chg
-----
AKW Audio Cassett 0 0 0 0 0
AKW Audio Cassett 0 0 0 0 0
AKW Bookmobile Ea 0 0 0 0 0
AKW Bookmobile Ea 0 0 0 0 0
AKW Biography 0 0 0 0 0
AKW Bookmobile Ju 0 0 0 0 0
AKW Bookmobile Ju 0 0 0 0 0
AKW Bookmobile Ju 0 0 0 0 0
AKW CD Fiction 0 0 0 0 0
AKW CD Non-Fictio 0 0 0 0 0
AKW Easy Picture 0 0 0 0 0
AKW Easy Non-Fict 0 0 0 0 0
AKW Fiction 0 0 0 0 0
AKW Juvenile Audi 0 0 0 0 0
AKW Juvenile Biog 0 0 0 0 0
-----
```

It will open in Notepad. That's why I put the ".txt" on the end.

Anatomy of the Overview Ad Hoc Report



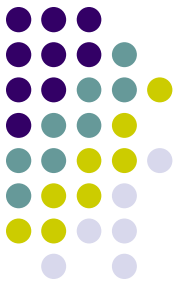
Same month last year

Current and Previous Month

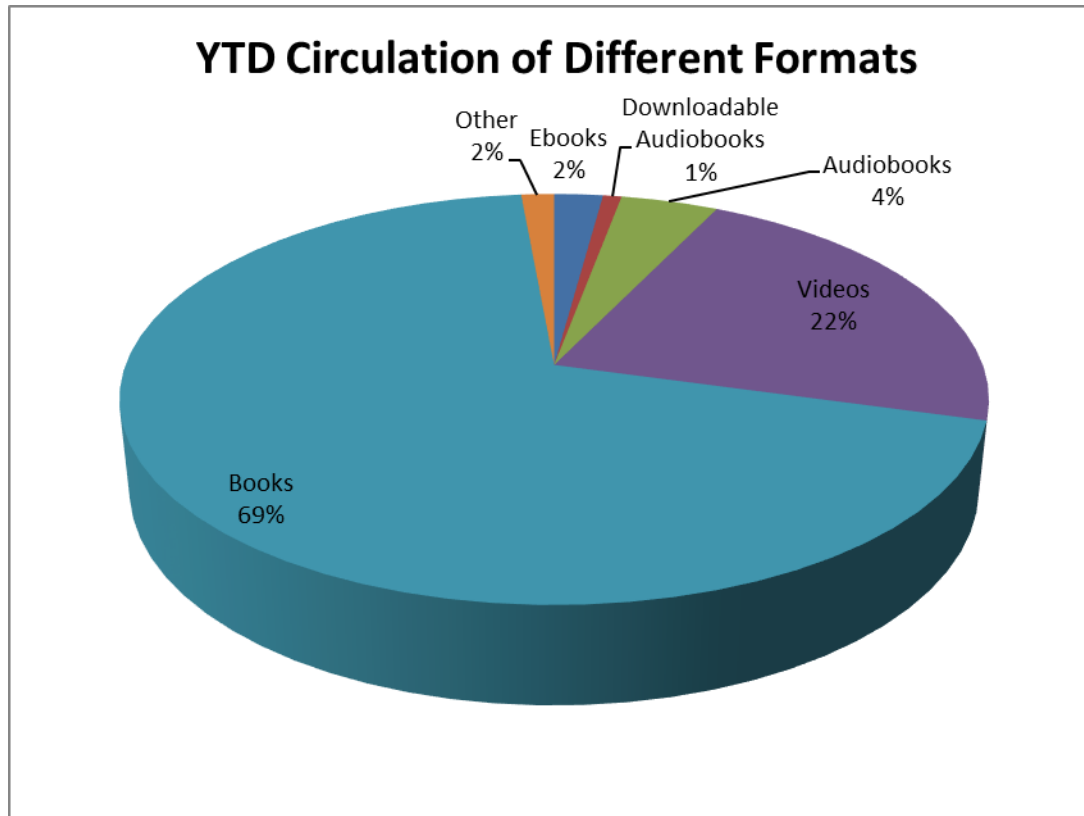
Year to Date compared to Previous Year, and % change.

Checkout Description	Current and Previous Month			Same month last year			Year to Date compared to Previous Year, and % change.		
	Feb 2014	Jan 2014	%chg	Feb 2013	%chg	2014 YTD	2013 YTD	%chg	
1st Time	303	475	-37	484	-38	778	958	-19	
Phone Renewal	0	0	0	39	-100	0	92	-100	
Renewal	47	65	-28	30	56	112	47	138	
Opac Renewal	14	4	250	24	-42	18	29	-38	
Offline 1st Time	0	0	0	0	0	0	0	0	
Offline Renewal	0	0	0	0	0	0	0	0	
Total	364	544	-34	577	-37	908	1126	-20	

Because the Circulation Reports show the current and previous month, as well as the year to date, you don't have to run them for each month. You could get all the data by running them for every other month, or just yearly data once a year. If running them for monthly board reports, consider just running the overview report, since it is the shortest one.



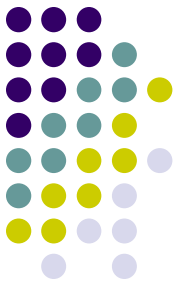
If you REALLY like data....



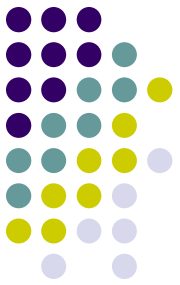
You can pick data out of the Ad Hoc Reports and put them in Excel to make graphs such as this!

This is the year to date data for the whole system as of April 2014, gleaned from the Monthly Circulation Details Report (Itype section).

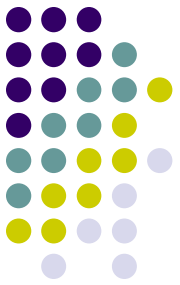
Which Ad Hoc Reports to Use?



- I find the “**Monthly Report – Overview**” good for general circulation and Horizon ILL statistics and is nice and short. I run this monthly and while I look at it, I run the other reports in the background. It’s good to wait a few days after the start of a new month before running the reports.
- The “**Monthly Report – Circulation Details**” is very long. I mainly look at the 6th section, the “itype” section. I extract numbers from this to put in my monthly statistics spreadsheet.



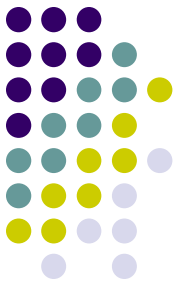
- The “**Monthly Report – Collection Snapshot**” counts how many of each type of item and borrower you have. It is also very long. You won’t usually need this report except at Annual Report time. You can use `item_report` and `borrower_list` to find out most information this report would provide.



More difficult reports

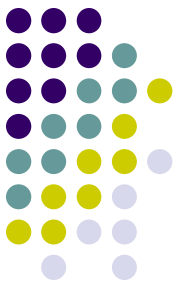
- There are some tables that are hidden from you in Horizon. Only the System Administrator can see them, because by making changes to them you could impact the database adversely.
- Some reports are hard to do from within Horizon. There's a tool called SQL Query Analyzer that I can use to do them.

Examples



```
select name, location, btype, borrower.borrower#,  
address1, city_st, postal_code  
from borrower, borrower_address  
where  
borrower.borrower#=borrower_address.borrower#  
and location='akw'  
order by btype
```

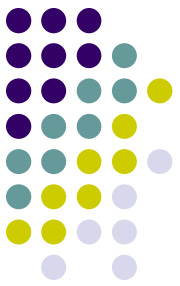
This is the SQL Query to get a list of borrowers with addresses for Akwesasne. The results are shown on the next slide.



Results of SQL Query

	name	location	btype	borrower#	address1	city_st	postal_code
1	Ad	AKW	akad	48	PO Box 1126	ho	13655
2	Ad	AKW	akad	63	PO Box 1126	ho	13655
3	Al	AKW	akad	222	1810 State Rt 11	nb	12966
4	An	AKW	akad	384	RR1	srq	HOM1A0
5	An	AKW	akad	385	380 St Regis Rd.	ho	13655
6	An	AKW	akad	388	9 Bull Run Rd.	co	12926
7	Ar	AKW	akad	475	Tarbell Rd.	ho	13655
8	Ar	AKW	akad	478	NULL	ho	13655
9	Ar	AKW	akad	479	190 Cook Road	ho	13655
10	Ar	AKW	akad	480	330 Rt. 37	NULL	13655
11	Ar	AKW	akad	483	120 Phillips	ho	13655
12	Ay	AKW	akad	624	75 Blair Kiln Rd.	c	12920

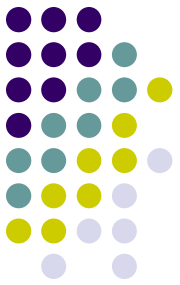
I would run the query for you and send the results as a Spreadsheet or text file. It can be formatted to be printed on labels.



Another example

	postal_code	borrowers	ckos	
1916	12992	425	2812	
1917	12937	213	2831	
1918	12972	465	3041	
1919	12943	344	3362	
1920	12962	760	5057	
1921	12870	386	6914	
1922	12996	980	8401	
1923	12953	2938	17947	
1924	NULL	3778	18229	
1925	12983	5012	22598	
1926	12901	6373	36379	

Here's a report of how many borrowers and how many checkouts by zip code.



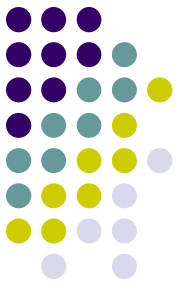
Another Example:

```
select count(distinct bib#)
from bib
where bib# not in (select bib# from item)
```

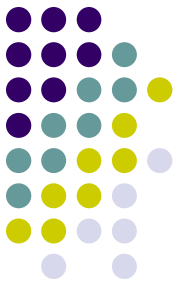
	(No column name)
1	6938

This gives the number of bibs with no items in our database.

If you can think of it....



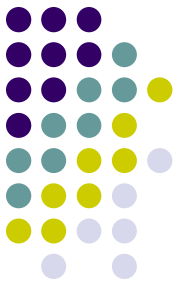
- I can ask the Horizon Users' Group listserve how to do it with SQL.
- I've seen examples of collection age studies, reports of most requested items for a "purchase alert," and shelf lists for inventory purposes.



Impossible Reports

- We can't tell you who borrowed an item in the past, unless they are the current or immediate past borrower or owe fines.
- This is a good thing for privacy of our patrons. The link is broken and the information doesn't exist in the database.
- Some statistics are collapsed over time. Circ data is preserved at the monthly level, daily stats are lost after the month changes.

That's all, but it's only the beginning



- There's a lot to learn about reports. Please don't hesitate to ask me when you wonder if the system can do something.

The End

