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.

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
Item_Report is Very Versatile
The Compound Search Window

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
Click “AND”, Highlight “Creation Date” and

Click Date Range.
Enter a date, click OK.
Now click Search.
Close the search window

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
   Blind bloodhound justice /
   In Cataloging

6. keunk BOOK CD 38787050701703
   I'm a stranger here myself [notes on returning to America after 20
   Checked In

7. kemys MF JOH 38787021580764
   Blind alley /
   Checked out

8. keacf L3 BOOK AND book 38787021580426
   The Titanic, lost-- and found /
   In Cataloging

Selection

Total: 63
Choose Call Number, Title, Item Type and Author

Deselect others that may be highlighted. Then Click OK.
Now click Sort.
Sort by Item Type, then Title

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

<table>
<thead>
<tr>
<th>Title/Author</th>
<th>Call No.</th>
<th>Item Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The edge</td>
<td>CASS COU</td>
<td>ac</td>
</tr>
<tr>
<td>Coulter, Catherine.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Bias a CBS insider exposes how the media distorts the news / Goldberg, Bernard, 1945-</td>
<td>CASS GOL</td>
<td>ac</td>
</tr>
<tr>
<td>3. Killjoy</td>
<td>CASS GAR</td>
<td>ac</td>
</tr>
<tr>
<td>Garwood, Julie.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. On dangerous Ground</td>
<td>CASS HIG</td>
<td>ac</td>
</tr>
<tr>
<td>Jack Higgins</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Passing strange</td>
<td>CASS HEY</td>
<td>ac</td>
</tr>
<tr>
<td>And, Catherine.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Close to the sun</td>
<td>CASS E</td>
<td>acm</td>
</tr>
<tr>
<td>Eyres, Peggy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Bad business</td>
<td>BOOK CD PAR</td>
<td>cd</td>
</tr>
<tr>
<td>Parker, Robert B., 1932-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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
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 a Report Type and one or more Locations

Choose Report Options

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

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

Click Save and the report will start to run. Remember where You saved it and its name!
This might take awhile. Time to get some coffee.
Find the report

There it is on my desktop.
If you double click….

It will open in Notepad. That’s why I put the “.txt” on the end.
Anatomy of the Overview Ad Hoc Report

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.

<table>
<thead>
<tr>
<th>Description</th>
<th>Feb 2014</th>
<th>Jan 2014</th>
<th>%chg</th>
<th>Feb 2013</th>
<th>%chg</th>
<th>2014 YTD</th>
<th>2013 YTD</th>
<th>%chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Time</td>
<td>303</td>
<td>475</td>
<td>-37</td>
<td>484</td>
<td>-38</td>
<td>778</td>
<td>958</td>
<td>-19</td>
</tr>
<tr>
<td>Phone Renewal</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>39</td>
<td>-100</td>
<td>0</td>
<td>92</td>
<td>-100</td>
</tr>
<tr>
<td>Renewal</td>
<td>47</td>
<td>65</td>
<td>-28</td>
<td>30</td>
<td>56</td>
<td>112</td>
<td>47</td>
<td>138</td>
</tr>
<tr>
<td>Opac Renewal</td>
<td>14</td>
<td>4</td>
<td>250</td>
<td>24</td>
<td>-42</td>
<td>18</td>
<td>29</td>
<td>-38</td>
</tr>
<tr>
<td>Offline 1st Time</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>Offline Renewal</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><strong>Total</strong></td>
<td><strong>364</strong></td>
<td><strong>544</strong></td>
<td><strong>-34</strong></td>
<td><strong>577</strong></td>
<td><strong>-37</strong></td>
<td><strong>908</strong></td>
<td><strong>1126</strong></td>
<td><strong>-20</strong></td>
</tr>
</tbody>
</table>

Same month last year

Current and Previous Month

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

<table>
<thead>
<tr>
<th>name</th>
<th>location</th>
<th>btype</th>
<th>borrower#</th>
<th>address1</th>
<th>city_st</th>
<th>postal_code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad</td>
<td>AKW</td>
<td>akad</td>
<td>48</td>
<td>PO Box 1126</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>Ad</td>
<td>AKW</td>
<td>akad</td>
<td>63</td>
<td>PO Box 1126</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>Al</td>
<td>AKW</td>
<td>akad</td>
<td>222</td>
<td>1810 State Rt 11</td>
<td>nb</td>
<td>12966</td>
</tr>
<tr>
<td>An</td>
<td>AKW</td>
<td>akad</td>
<td>384</td>
<td>RR1</td>
<td>arq</td>
<td>HOM1A0</td>
</tr>
<tr>
<td>An</td>
<td>AKW</td>
<td>akad</td>
<td>385</td>
<td>380 St Regis Rd.</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>An</td>
<td>AKW</td>
<td>akad</td>
<td>388</td>
<td>9 Bull Run Rd.</td>
<td>co</td>
<td>12926</td>
</tr>
<tr>
<td>Ar</td>
<td>AKW</td>
<td>akad</td>
<td>475</td>
<td>Tarbell Rd.</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>Ar</td>
<td>AKW</td>
<td>akad</td>
<td>478</td>
<td>NULL</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>Ar</td>
<td>AKW</td>
<td>akad</td>
<td>479</td>
<td>190 Cook Road</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>Ar</td>
<td>AKW</td>
<td>akad</td>
<td>480</td>
<td>330 Rt. 37</td>
<td>NULL</td>
<td>13655</td>
</tr>
<tr>
<td>Ay</td>
<td>AKW</td>
<td>akad</td>
<td>483</td>
<td>120 Phillips</td>
<td>ho</td>
<td>13655</td>
</tr>
<tr>
<td>Ay</td>
<td>AKW</td>
<td>akad</td>
<td>624</td>
<td>75 Blair Kiln Rd.</td>
<td>c</td>
<td>12920</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>postal_code</th>
<th>borrowers</th>
<th>ckos</th>
</tr>
</thead>
<tbody>
<tr>
<td>1916</td>
<td>12992</td>
<td>425</td>
</tr>
<tr>
<td>1917</td>
<td>12937</td>
<td>213</td>
</tr>
<tr>
<td>1918</td>
<td>12972</td>
<td>465</td>
</tr>
<tr>
<td>1919</td>
<td>12943</td>
<td>344</td>
</tr>
<tr>
<td>1920</td>
<td>12962</td>
<td>760</td>
</tr>
<tr>
<td>1921</td>
<td>12870</td>
<td>386</td>
</tr>
<tr>
<td>1922</td>
<td>12996</td>
<td>980</td>
</tr>
<tr>
<td>1923</td>
<td>12953</td>
<td>2938</td>
</tr>
<tr>
<td>1924</td>
<td>NULL</td>
<td>3778</td>
</tr>
<tr>
<td>1925</td>
<td>12983</td>
<td>5012</td>
</tr>
<tr>
<td>1926</td>
<td>12901</td>
<td>6373</td>
</tr>
</tbody>
</table>
Another Example:

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

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