Ad Hoc Report Procedures for Annual Report

There are 2 Ad Hoc Reports you should run for your annual report. The Ad Hoc reports can be run at any time, but they are very slow and can tie up your computer while they run. Leave plenty of time for these reports. (Note – if you use Remote Desktop, the reports will not save to your computer. Please call the CEFLS Automation Department.)

1. Monthly Report - Collection Snapshot – this report gives total number of items in your collection and total **number of patrons registered as of a certain date**. It breaks down the patrons down by borrower type and borrower stat code (such as resident/nonresident). If you are consistent in entering resident OR nonresident for each registered patron, it will give you the answer to the questions in that section.

2. Monthly Report - Circulation Details – this report gives circulation for a given month and includes a "year-to-date" column. Choose your location, and the last day of the previous year, and choose save to file. Give the file name an extension of ".txt", so that the report will open in Notepad. This report is EXTREMELY LONG – don't print unless you really need to. We recommend using the Circ:Itype section to find how many of each category your library circulated. It's the sixth section. The sixth column from the left gives year to date numbers.

To run these reports for the Annual Report, do the following:

In Horizon:

1. Find the icon on the navigation bar that is labeled "Ad Hoc Reports." It should be in the Circulation or Administration folder

2. Double click on the icon to start Ad Hoc Reports.

3. Choose one report type from the left column, for example "Monthly Report - Collection Snapshot."

4. Choose your location from the right column. Be sure to deselect any locations you don't want reporting on.

The first location on the list is preselected, so you will need to click on it to deselect it.

5. Choose the date as of which you want statistics. Since you are interested in the statistics for last year as a whole choose the **last day of the year** – the monthly report gives year to date figures. If you have only been on Horizon part of the year, you can add your manual data to the totals for the partial year.

6. Click the button that says "Save to File." You could print the report instead, but you may probably want to edit it first, or just save it and look at it to extract data.

7. When you choose "Save to File" a Windows dialog box appears, allowing you to choose a destination and name for your report. When you name your report, try to give it a descriptive name such as 2010CircStats.txt. For this example, save it to your "My Documents" folder.

8. When the progress bar shows that the report has finished generating, you can close the Ad Hoc Reports window.

9. Minimize Horizon and find the file you just created by going to My Documents. Double Click on the file.

10.   The file should open in Windows Notepad. Or, you could open Word first and open the file in Word. If the columns don't line up well, select all the text (Control-A) and change the font to Courier New.

11.   In the Circulation Details report, you will notice many line of zeros, since the report includes all the collection codes and statistical categories in all CEF libraries – that's over 1000 collection codes alone! But there will be numbers in some of these lines for when you checked out items from other libraries.