



ARC User's Guide

Version 3.0

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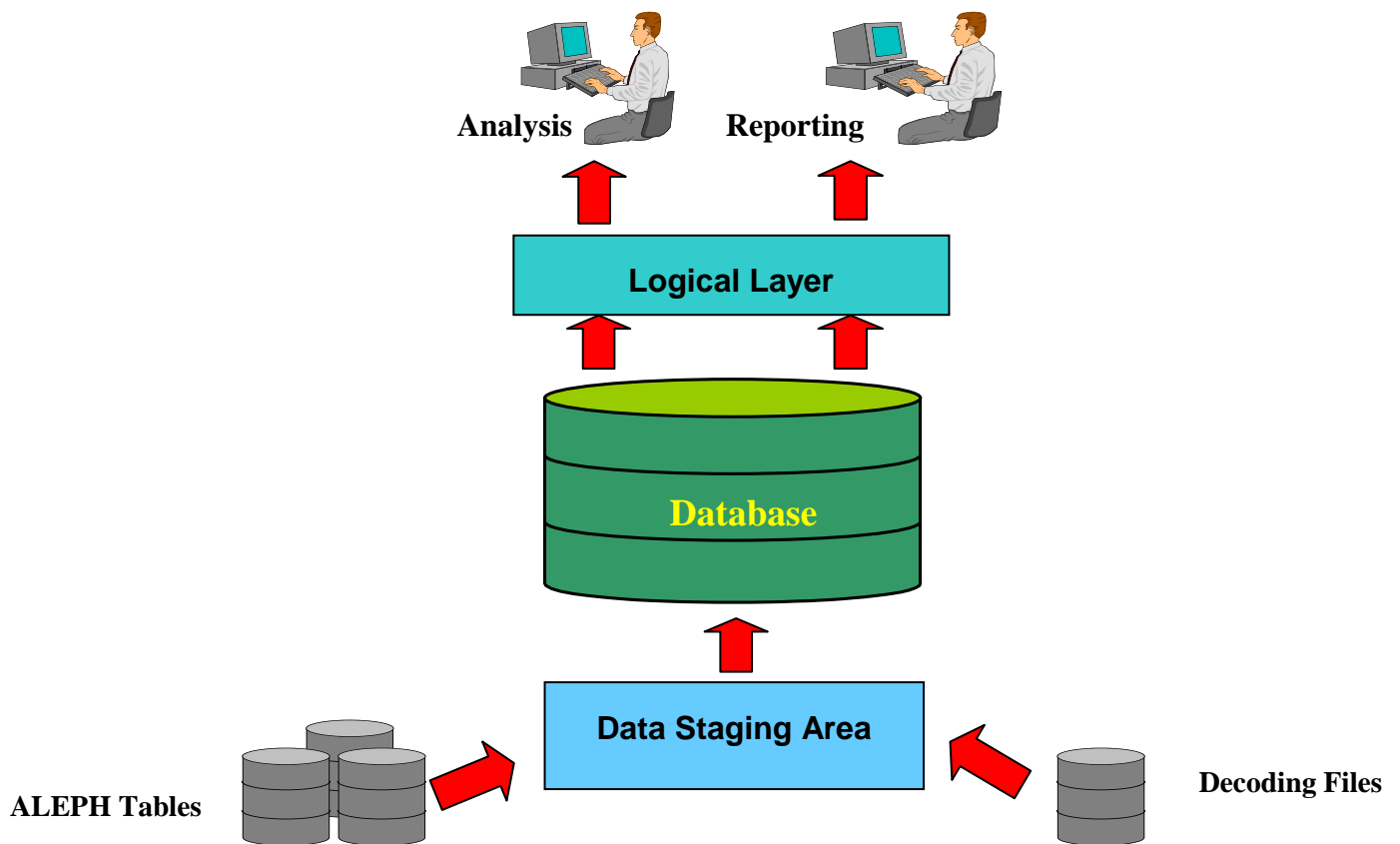
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Contents

Chapter 1. Introduction to ARC	1
About This Document	1
What is ARC?	1
ARC Reports	3
Packages	4
Which Package Do I choose?	5
Online Help	11
Chapter 2. Using ARC for the First Time	13
Log On	13
Accessing ARC from ALEPH GUIs	13
Log Off	14
Looking at the Initial Screen	14
Chapter 3. Working with Reports	15
Accessing Pre-authored Reports	15
Report Options	17
Creating a New Report	17
Showing/Hiding Sections	23
Naming Reports	24
Changing Captions of Column Headers	24
Saving Reports	24
Scheduling Reports	26
Chapter 4. Summaries of Pre-Authored Reports	26
Acquisitions	26
General	26
Orders	27
Expenditure	30
Budgets	32
Vendors and Claims	33
Circulation Based on Events	34
Circulation and Cash	37
Loans	37
Returns	38
Renewals	39
Patrons	39
Cash	42
ILL	43
Requests	45
Booking	45
Patrons	47
Collection Management	48
Collection Management	48
Serials	51
Course Reading	52
OPAC	53
Bibliographic Data	55
ETL	56
Loans	56
Cash	57
Requests	58
Booking	58
Hold Requests	59
Photocopy Requests	60

Events _____	61
Loans _____	61
Miscellaneous _____	61
Patrons _____	63
Renewals _____	64
Returns _____	64
Acquisition Orders _____	65
Budgets _____	65
Expenditure _____	65
Miscellaneous _____	66
Orders _____	67
Vendors & Claims _____	69
Course Reading _____	70
Acquisition Budgets _____	71
Budgets _____	71
Expenditure _____	72
Inventory _____	73
Circulation _____	73
Collection Management _____	75
ILL _____	78
Serials _____	79
Circulation Logger _____	80
Chapter 5. List of Important Terms _____	82

Conceptual Overview of the ARC System

ARC combines designated, integrated data collections, organized by library activities, including history depth, and updated on different levels according to the topic.

ARC uses DWH (Data Warehouse) methodologies to allow fast and efficient information retrieval. The Data Warehouse is a completely separate database, which retrieves its information from the existing operational systems on a fixed basis and is designed in a designated architecture suitable for direct access by users. The architecture allows full analysis on different levels, retrieving data exceptions, filtering necessary data, and activating different functions on the data in an independent, friendly, and very fast manner for decision supporting throughout the organization.

CHAPTER 1

Introduction to ARC

About This Document

This guide assumes that you are a librarian, staff user, or library manager familiar with the ALEPH 500™ ILS. You do not need to have knowledge of the ALEPH database table structure, nor of SQL programming.

This guide shows you how to get started with the ARC (ALEPH 500 Reporting Center). It explains:

- Important concepts.
- Basic procedures.
- Pre-authored reports available in the ARC

This guide is intended to complement the comprehensive Online Help authored by Cognos with specific reference to ARC. Full details about advanced tasks and the interface are available in the Online Help.

What is ARC?

ARC is a Web-based reporting, querying, and statistical generation environment derived from information contained within the ALEPH system. It allows you to access ad-hoc statistics regarding virtually any aspect of your library instantly.

ARC is integrated with the IBM Cognos ReportNet™ software, which is simple to manage and which can be integrated with any application or environment your library uses.

Operational data within the Reporting Center is collected from various ALEPH data sources and presented in a logical structure that enables cross-referencing from multiple areas within the system. This provides all branches of your organization with a single view of system data. You can manipulate the operational data to generate reports and statistics needed to make daily workflows and future library procedures more efficient.

ARC comes complete with a selection of standard pre-defined reports and statistics that draw on information from data sources within the following ALEPH system modules: Web OPAC, Cataloging, Circulation, Acquisitions/Serials, ILL, and Course Reading (see **Error! Reference source not found.** on page **Error! Bookmark not defined.**). You can use your desktop Web client to customize these pre-authored ALEPH reports and save them for future library use. ARC also includes a set of tools that provide you with the environment required to create and generate library-specific reports and statistics. All saved reports can be shared across the library, consortium, or with other institutions running ALEPH 500.

Cognos Viewer - Monthly Order Statistics by Order Date Budget and Sub Library
ARC Administrator USMRO Log Off

Report Studio

Monthly Order Statistics by Order Date Budget and Sub Library

From Date: Jan 1, 2001 To Date: Mar 11, 2007

Sub Library Desc	Order Year and Month	Budget Number	Number of Orders	Total Local Sum
East Asian Library	2001/01	215.17040.436400..533013.0000.00000-2003	1	-50
	2001/01		1	-50
	2001/10	215.17630.000001..533013.0000.00000-2004	1	-50
	2001/10		1	-50
	2002/01	215.17630.000001..533013.0000.00000-2004	1	-100
	2002/01		1	-100
	2007/02	GIFT-DEFAULT	3	-130
	2007/02		3	-130
	2007/03	1234567	1	-10
	2007/03		1	-10
East Asian Library				
			7	-340
Humanities Library	2007/01	1234567	1	-10
	2007/01		1	-10
	2007/02	GIFT-DEFAULT	1	-100
	2007/02		1	-100
	2007/03	1234567	1	-60

Top Page up Page down Bottom

ARC comes complete with a selection of standard pre-defined reports and statistics that draw on information from data sources within the ALEPH system modules.

Menu

- Insert Data
- Edit Data
- Change Layout
- Run Report
- Manage File

Font Size B I U

Title

Select and insert items from the tree to fill in the report.
You can also drag and drop items into the report.

Use Ctrl+click to select multiple items in the tree or report.
Right-click report item headings to access commonly-used actions.

Insert

Information

An intuitive set of tools provides you with the environment required to create and generate ad-hoc, library-specific reports and statistics.

Based on an adaptable set of library-defined rules and definitions, the Reporting Center is based on three main components:

- **Extract, Transfer and Load (ETL)** – This component extracts and integrates data from all the ALEPH Oracle tables and transforms it into a clear library-defined reporting structure and language.
 - **Extract stage** – Captures data from ALEPH sources.
 - **Transformation stage** – Eliminates operational data anomalies by rationalizing data, adding required elements, integrating data from different sources within the system, and transforming it prior to loading.
 - **Loading stage** – Places the data into the ARC database.



- **Storage** – This component maintains and manages the integrated and transformed data received from the ETL component.
- **Access** – This is the component utilized by library staff to query and analyze the stored data, resulting in the generation of customized reports and statistics.

The ETL process takes place at library-defined intervals, by means of a batch program. It includes:

- Extraction and integration of data from ALEPH source modules
- Transformation of data into star schema and other library-defined data structures
- Load/transport of data into the Reporting Center repository.

Your library can define the extraction time so that it coincides with library closing hours, even though ETL does not necessarily lock the library. You can access and query the data stored in this newly-created repository.

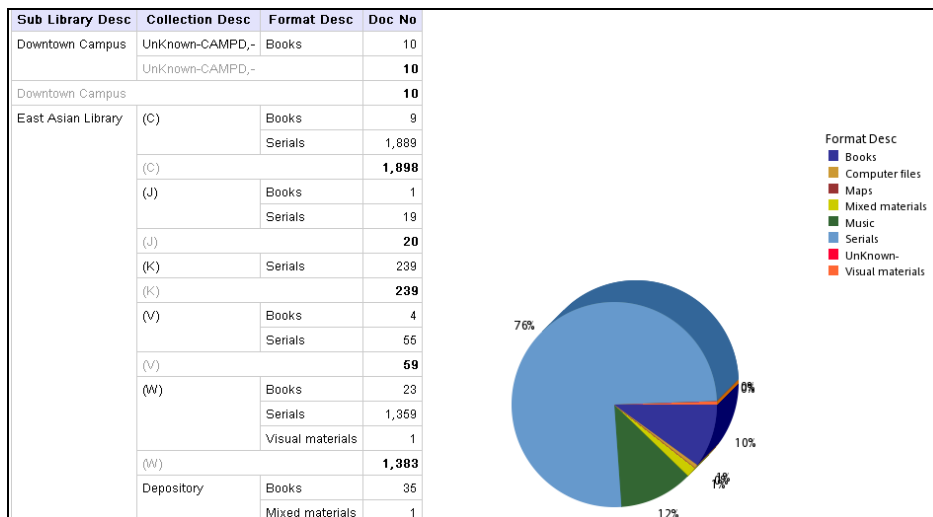
The ALEPH Reporting Center runs on Linux and Sun Solaris.

ARC Reports

ARC comes complete with a wide range of standard reports (see *Summaries of Pre-Authored Reports* on page 26).

You can create reports containing any number of objects – charts, cross tabs, and lists – as well as images, logos, and live embedded applications that can be linked to the information. Queries can draw data from all ALEPH modules.

You can arrange report objects by simply dragging and dropping them into the report authoring window. The adaptive report authoring environment automatically arranges report objects in the window each time one is added or removed.



Dynamic, multi-object reports can contain objects (charts, cross tabs, and lists) as well as images, logos, and live embedded applications.

Vendor Name	Item Material Type Desc	Order Number	Order Year and Month	Local Price
Order Report by Order Status				
Order Status Desc: Cancelled - no budget, Delayed - no budget, Library cancelled, Need budget confirmation, New, Order closed, Processing started, Query before vendor				
Order Date: Greater than or equal to Jan 1, 2002 12:00 AM				
Order Status Desc: Delayed, no budget				
Elasca Subscription Services	unknown -	1520-1	286	0
WILLIAM S HEIN AND CO Hein Building	Issue	196	304	0
Order Status Desc: Order closed				
Walter Kaefer	unknown -	336-14	2004	10
American Anthropological Association, AAA	unknown -	51477	501	0
American Anthropological Association, AAA	Book	51478	401	1
American Library Association	Issue	615-11	2002	20
Association of American Colleges and Unive	unknown -	51508	401	108
Blackwell's Book Services Ltd	unknown -	51479	501	100
Cambridge University Press	Issue	2138-2	501	20
China Books and Periodicals, Inc	Issue	4388-1	202	0

ARC delivers all report formats (PDF, Excel, CSV, XML etc) including lists, cross tabs, charts, and multi-page statement layout.

Packages

Before you can start creating tables, you have to select a package :

- [Name](#)
- [Acquisitions](#)
- [Circulation Based on Events](#)
- [Circulation and Cash](#)
- [Patrons](#)
- [Collection Management](#)
- [OPAC](#)
- [Bibliographic Data](#)
- [ETL](#)
- [Loans](#)
- [Cash](#)
- [Requests](#)
- [Events](#)
- [Acquisition Orders](#)
- [Course Reading](#)
- [Acquisition Budgets](#)
- [Inventory](#)
- [Audit](#)
- [Circulation Logger](#)
- [Customized Reports](#)

A package is a combination of tables that create a content environment. In the Entity Relationship Diagrams, packages contain one or more main subjects that correspond to fact tables.

Which Package Do I choose?

To create a report about...	Choose Package	Main Subjects for Analysis	Limitations	Notes
Loans	Loans	Information about Loans and Loans History		
Cash	Cash	Summary of Fines information and Patrons Cash Payments, based on Fines data		Cash is related to loans. Accordingly, if you choose data from both tables, only loans that are connected to a cash transaction are presented in the report.
Requests	Requests	Information about Hold Requests, Booking Requests, and Photocopy Requests		
Circulation Activities	Events	Circulation information and statistics about circulation activities, such as: Loans, Returns, Renewals, Lost and Claimed Returned Items - Based on circulation transactions and circulation events	<p>Events and orders – All the order measures in this package (except for "No of Orders" which is not displayed) are not used as measures, but rather as text fields that give additional information on the Event.</p> <p>(Fields are: Unit Price, No of Units, No of Units Received, Listed Price, Term Sign, Term Percent, Price, Local Price Claim Days for Standing Orders, Delivery Time, No of Claims, Actual Local Price, and Actual Original Price).</p> <p>Aggregation and summary should not be done on these fields.</p>	<p>Using this package you can analyze all transactions in the Circulation module.</p> <p>Choose the "Loans" package for deeper analysis of loans and the "Requests" package for deeper request analysis.</p> <p>Circulation transactions (events) are related to items. Therefore, only items connected to an event are presented in the report. You can also see events that are not connected to an item. Similarly, as events are related to orders, only orders that are connected to an event are presented in the report.</p>

To create a report about...	Choose Package	Main Subjects for Analysis	Limitations	Notes
Orders	Acquisition Orders	Information about Order Budgets, Expenditures, Vendors, and Claim and Acquisition statistics in general, based on Order data.	Orders are related to budgets. Therefore, if you choose data from both tables it should not include measures from Orders at all. Otherwise, there might be duplicates in the report, which would be misleading. (Each order can have many budgets and many budget transactions.)	If you need measure information from both Orders and Budgets, it is recommended to create a father-son report. In a father and son report, ("Drill Through") the father report includes only information from orders including measures, and the son report only includes information from budgets including budget measures (only budgets that are connected to orders).
Patron information	Patrons	Local and global patron information		

To create a report about...	Choose Package	Main Subjects for Analysis	Limitations	Notes
Items	Inventory	Information about Items and Items history and Circulation activities based on Item data.	<p>1) All the order measures in this package (except for "No of Orders" which is not displayed) are not used as measures, but rather as text fields that give additional information on the Item.</p> <p>(Fields are: Unit Price, No of Units, No of Units Received, Listed Price, Term Sign, Term Percent, Price, Local Price Claim Days for Standing Orders, Delivery Time, No of Claims, Actual Local Price, and Actual Original Price).</p> <p>Aggregation and summary should not be done on these fields.</p> <p>2) Items are related to Events. Therefore, if you choose data from both tables it should not include any measures from Items. Otherwise, there might be duplicates in the report, which would be misleading.</p> <p>3) Items are related to Items History. Therefore, if you choose data from both tables it should not include any measures from Items. Otherwise, there might be duplicates in the report, which would be misleading.</p>	<p>Items are related to Orders. Therefore, if you choose data from both tables, only Orders that are connected to an ADM document with Items are presented in the report.</p> <p>Items are related to Circulation Events.</p> <p>Therefore, if you choose data from both tables, only events that are connected to Items are presented in the report.</p> <p>If you need measure information from both Items and Events, it is recommended to create a father-son report.</p> <p>In a father and son report ("Drill Through"), the father report only includes information from Items, including measures, and the son report only include information from Events, including Event measures (only Events that are connected to Items).</p>

To create a report about...	Choose Package	Main Subjects for Analysis	Limitations	Notes
Course Reading	Course Reading	Information from course reading data and its related Items.	<p>Course Reading are related to Items. Therefore, if you choose data from both tables (Items and Course reading) it should not include any measures.</p> <p>Otherwise, there might be duplicates in the report, which would be misleading.</p>	<p>Course Reading are related to Items. Therefore, if you choose data from both tables, only Items that are connected to a course are presented in the report.</p> <p>If you need measure information and have both Course Reading and Items tables in the report, it is recommended to create a father-son report ("Drill Through").</p> <p>In a father-son report the father report only includes information from Course Readings, including measures, and the son report only includes information from Items, including Item measures (only Items that are connected to Course Readings).</p>

To create a report about...	Choose Package	Main Subjects for Analysis	Limitations	Notes
Budgets	Acquisition Budgets	Information about Budget transactions, Orders, and Invoice Header based on Budget Transaction data.	<p>1) All the Orders measures in this package (except for "No of Orders" which are not displayed) are not used as measures but as text fields that give additional information on the Budget Transaction. (Fields are: Unit Price, No of Units, No of Units Received, Listed Price, Term Sign, Term Percent, Price, Local Price Claim Days for Standing Orders, Delivery Time, No of Claims, Actual Local Price, and Actual Original Price). Aggregation and summary should not be done on these fields.</p> <p>2) The Invoice measures in this package are not used as measures, but rather as text fields that give additional information on the Budget Transaction (Fields are: Net Amount, Total Amount, VAT Amount, and Payment Amount). Aggregation and summary should not be done on these fields.</p>	<p>Budget Transactions are related to Orders. Therefore, if you choose data from both tables, only Orders that are connected to a Budget Transaction are presented in the report.</p> <p>Budget Transactions are related to Invoice Headers. Therefore, if you choose data from both tables, only Invoice Headers that are connected to a Budget Transaction are presented in the report.</p>
Web OPAC	OPAC			OPAC is a stand-alone subject.
Cataloging Information	Bibliographic Data	Bibliographic and Catalogers Information		This is a stand-alone subject.

To create a report about...	Choose Package	Main Subjects for Analysis	Limitations	Notes
ETL Process	ETL	ETL process		ETL is a stand-alone subject
ARC Usage	Audit	User Activities within ARC		
Circulation Logger	Circulation Logger	Information about Circulation activities based on Circulation Logger		

The following remarks relate to all packages:

- In the process of creating the data warehouse, if a characteristic appears as a fact and not as a dimension, it is automatically generated and includes the caption *Unknown*. This process is called Referential Integrity. This process gives you an added value because it floats the irregulars in your database. If you add the missing characteristics to the ALEPH database, they no longer appear with the caption *Unknown*.
- The perspective of the ALEPH Reporting Center is an administrative point-of-view. Therefore, the information that is presented in the Data warehouse depends on whether or not an ADM record exists. For example, a bibliographic record which does not have an item does not appear in the ALEPH Reporting Center.

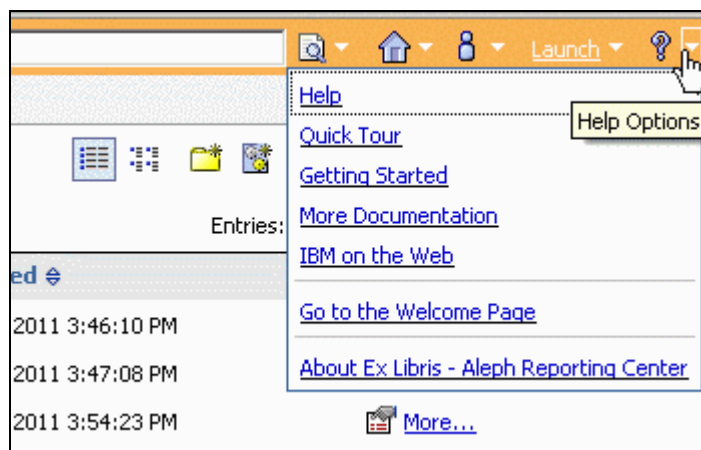
Online Help

Context-sensitive Online Help is available from the **Help** button or link in a Web browser. The information in each online help system is also available in online book format (PDF). However, the information from a given help system may be divided into more than one online book. Use online books when you want to print a document or when you want to search the whole document. The Query Studio-related documentation is the most relevant for your needs as an ARC user.

You can print selected pages, a section, or the whole book.

Online books are available from the introduction to the online help for each component.

The **Public Folders** screen contains several options for learning more about Cognos ReportNet:



- Help Link
- Quick Tour
- Getting Started
- More Documentation
- IBM on the Web

Quick Tour – This option contains three relevant tours that teach basic skills:

- Navigate the Portal
- Work with Reports
- Distribute and Schedule Reports
- Manage Pages
- Personalize the Portal

Help Link– This is your gateway to IBM Cognos 8 documentation.

IBM Cognos documentation includes user guides, tutorial guides, reference books, and other materials.

Getting Started – This option introduces the Cognos 8 Business Intelligence architecture and provides examples to illustrate key functionality.

More Documentation – This option contains references to IBM Cognos Product Documentation such as: Readme, New Features, Architecture, Installation, Configuration, and Administration

IBM on the Web – This option redirects to the IBM - Cognos Business Intelligence and Performance Management Software Web site.

CHAPTER 2

Using ARC for the First Time

Log On

ARC supports authenticated user access. To use ARC as an authenticated user, you must successfully log on.

The URL syntax for accessing ARC is `http://<server_name>:<port>/cognos8`.

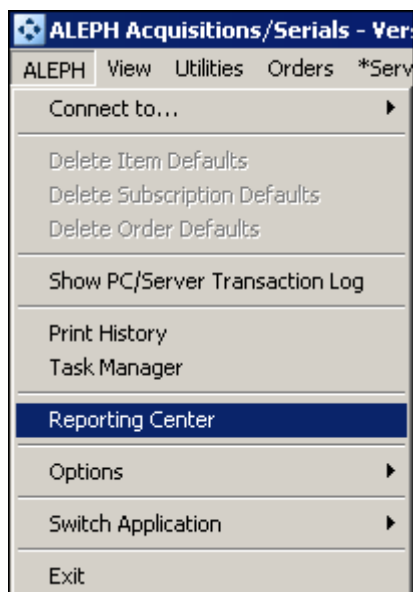
Steps

- 1 In ARC, click **Log On**.
- 2 Click **OK** and type your user ID and password.
- 3 Click **OK**. Your session starts.

Tip: If you want to see a summary of your logon information for the current session, in ARC, click **My area -> My Preferences** and then click the **Personal** tab.

Accessing ARC from ALEPH GUIs

You can access the ARC logon screen via the **Reporting Center** command in the ALEPH menu in the **Acquisitions/Serials**, **Cataloging**, and **Circulation** GUIs (providing this option has been enabled by your system librarian):



Log Off

You log off to end your session. If you close your Web browser without logging off, your session ends.

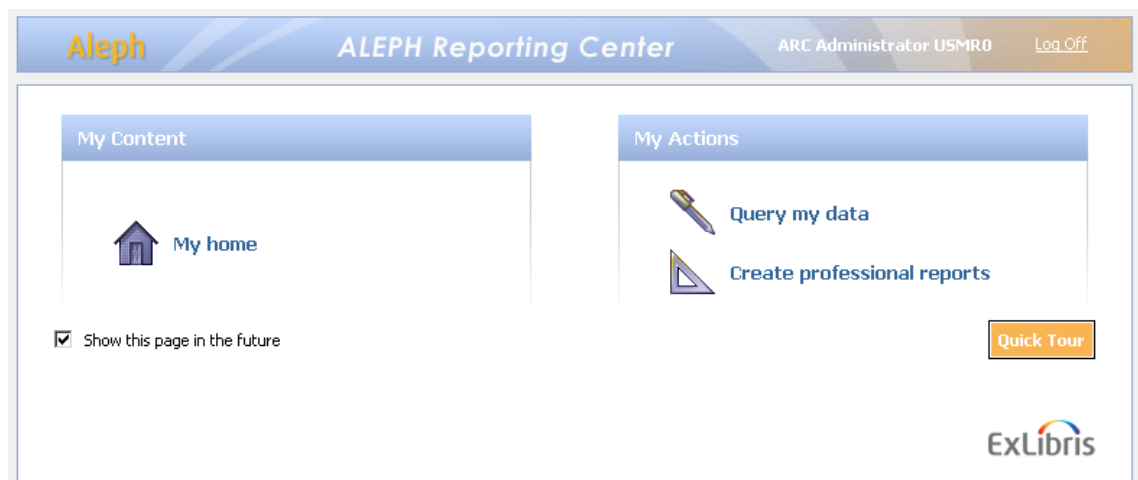
Steps

- 1 In ARC, click **Log Off**. You are now logged off from the current session.
- 2 Choose whether or not you want to log on again.
 - If you do not want to log on again, close your Web browser.
 - If you want to log on again as an authenticated user, click **Log on again...**

Looking at the Initial Screen

Note

If your institution has chosen to customize the ARC Web interface, the screens are different from those shown here.



The ARC Welcome screen contains the following areas:

Click **My Home** to access packages from Public Folders containing reports that have been pre-authored by Ex Libris.

Click **Query Studio** or **Report Studio** to create reports in the selected studio.

You must have write permissions for a folder in order to create entries in it.

Click **Log Off** to log off.

Working with Reports

You use reports to analyze data to help you manage your library's activities, to identify problems, and to improve efficiency. In ARC, reports can be either be designed for personal use only, or made accessible for other staff users.

Your ARC installation contains a number of predefined models that have been created from subsets of library data. These models have been published as packages and are used to create reports.

You can create ad hoc, simplified reports using Query Studio, or you can use Report Studio to design more complex forms. After you have published your report in ARC, you can then run the report or view the report's output. You can also view the report in various formats, schedule the report, and distribute the report.

As Report Studio is probably more suitable for systems librarians, in this chapter we focus on Query Studio.

Accessing Pre-authored Reports

Steps

- 1 From the **Welcome** screen, click **My Home** and then **Public Folders**. A list of folders appears, organized into subjects related to areas of library management:

<input type="checkbox"/>	Name ↕
<input type="checkbox"/>	Acquisitions
<input type="checkbox"/>	Circulation Based on Events
<input type="checkbox"/>	Circulation and Cash
<input type="checkbox"/>	Patrons
<input type="checkbox"/>	Collection Management
<input type="checkbox"/>	OPAC
<input type="checkbox"/>	Bibliographic Data
<input type="checkbox"/>	ETL
<input type="checkbox"/>	Loans
<input type="checkbox"/>	Cash
<input type="checkbox"/>	Requests
<input type="checkbox"/>	Events
<input type="checkbox"/>	Acquisition Orders
<input type="checkbox"/>	Course Reading
<input type="checkbox"/>	Acquisition Budgets
<input type="checkbox"/>	Inventory
<input type="checkbox"/>	Audit
<input type="checkbox"/>	Circulation Logqer

2 Click on a folder, for example, **Acquisitions**. A list of subfolders related to the subject matter is displayed:








<input type="checkbox"/>	Name ↕	Modified ↕	Actions
<input type="checkbox"/>	General	October 25, 2006 12:07:10 PM	More...
<input type="checkbox"/>	Orders	February 13, 2007 10:29:38 AM	More...
<input type="checkbox"/>	Expenditure	February 10, 2008 2:49:08 PM	More...
<input type="checkbox"/>	Budgets	February 10, 2008 2:49:46 PM	More...
<input type="checkbox"/>	Vendors & Claims	November 2, 2006 2:25:57 PM	More...
<input type="checkbox"/>	Drill Through	June 19, 2008 10:50:50 AM	More...

3 Click on a subfolder, for example, **Orders**. A list of related reports is displayed:

<input type="checkbox"/>	Name ↕	Modified ↕	Actions
<input type="checkbox"/>	Canceled Orders by Order Status Date and Sub Library	February 2, 2009 10:41:29 AM	
<input type="checkbox"/>	Closed Orders by Order Status Date and Sub Library	February 2, 2009 10:41:29 AM	
<input type="checkbox"/>	General Orders by Sub Library	February 2, 2009 10:41:26 AM	
<input type="checkbox"/>	Monthly Order Statistics by Order Date Budget and Sub Library	February 2, 2009 10:41:29 AM	
<input type="checkbox"/>	Order Numbers by Vendor Name	February 2, 2009 10:41:26 AM	
<input type="checkbox"/>	Orders by Budgets	February 2, 2009 10:41:26 AM	
<input type="checkbox"/>	Orders by Order Date, Sub library And Order Status	February 2, 2009 10:41:26 AM	
<input type="checkbox"/>	Orders By Sub library and Order Status	February 2, 2009 10:41:29 AM	
<input type="checkbox"/>	Orders For Serials Purchased	February 2, 2009 10:41:27 AM	

Using the tools available, you can run, edit, and distribute the reports shown.

Report Options

To	Do this
Run a report.	Click on the report's name, or Click the adjacent  icon
Set the report's properties.	Click the  icon in the line of the report. In the screen that opens you can change the ownership of the report, change the report name and language, and write a description for the report.
Open the report with Report Studio to change it or to see the underlying SQL query. <u>Note:</u> Users logged on with the Author/Consumer role can open reports in the report studio, but cannot save changes.	Click the  icon in the line of the report.
Keep a report's specifications with the possibility of changing the report format, language, delivery method, or run option.	Click the  icon in the line of the report to create a report view. After you save the report view, the icon looks like this:  If the source report was deleted or moved to another location, the report view icon changes to  to indicate a broken link, and the properties link to the source report is removed.
Schedule a run for a report.	Click the  icon in the line of the report to open the Schedule Manager. Define the frequency, format, delivery method, prompt values, and languages.

More general options are available on this screen:



For information about them, click Help on this screen.

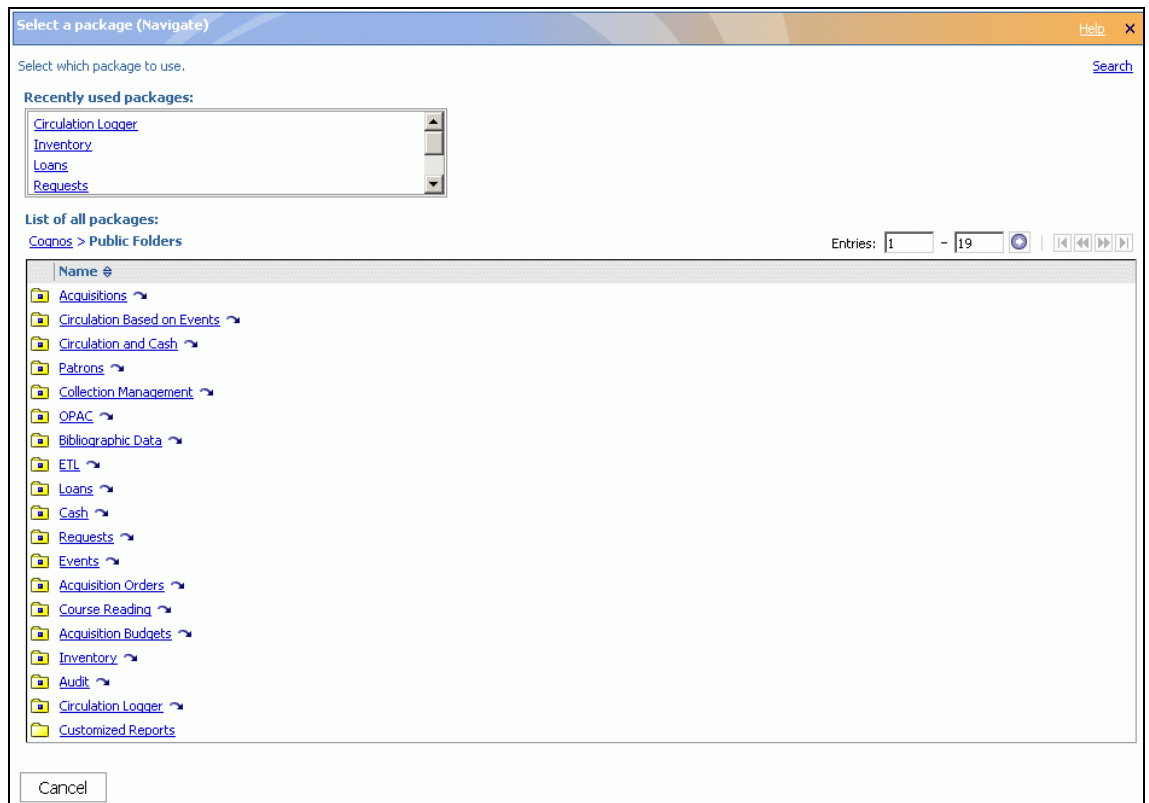
Creating a New Report

Steps

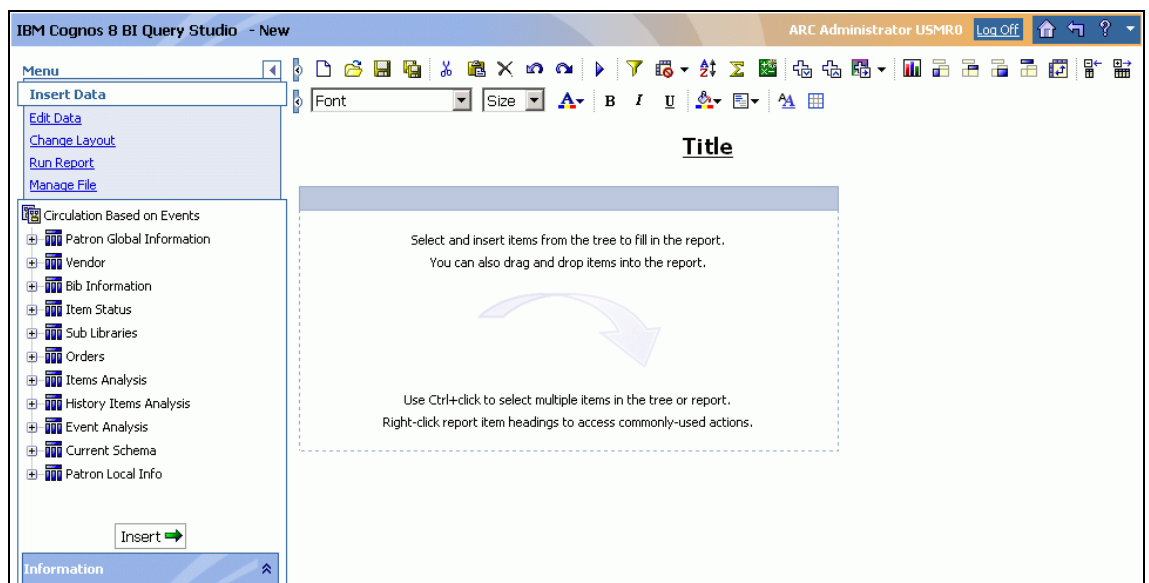
- 1 Click **Query Studio** from the Welcome screen or select it from the **Launch** dropdown menu in the Public Folders screen.

2

The following screen appears:



3 Click one of the underlined package names, for example, **Circulation Based on Events**. A blank report screen opens:



- 4 You can start creating your report, provided the menu is in **Insert Data** mode, as shown above. The left pane contains a tree with available parameters. Choose which parameters you would like to put in your report and move them to the middle of the screen.

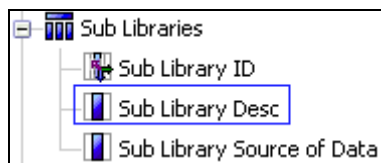
You can move the parameters in two ways:

- Drag-and-drop a parameter from the left pane to the middle of the screen.
- Double-click a parameter. This moves it automatically to the middle of the screen.

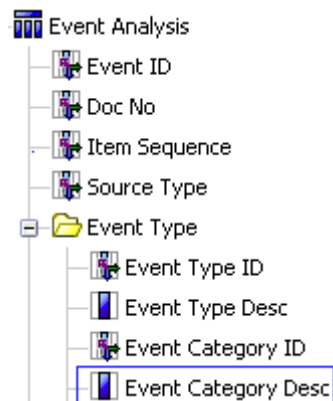
For example, a report entitled *Number of Circulation Transactions* would need the following parameters:

- Sublibrary Description
- Event Category Description
- Event Date
- Number of Events

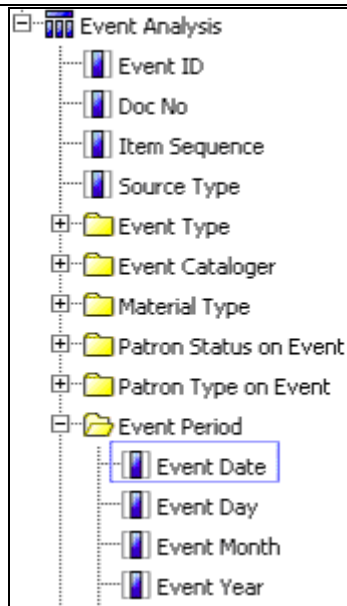
These parameters can be found under the **General** package. Take **Sublibrary Desc** from **Sub Libraries**:



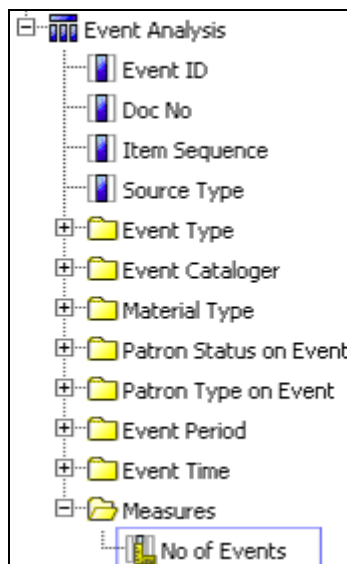
Take **Event Category Desc** from **Event Type** under the **Event Analysis** tree:



Take **Event Date** from **Event Period** under the **Event Analysis** tree:



Take **No of Events** from **Measures** under the **Event Analysis** tree:




After all the parameters have been inserted, the following is created:

<u>Title</u>			
Sub Library Desc	Event Category Desc	Event Date	No of Events
East Asian Library	Hold Requests	Feb 21, 2007 12:00:00 AM	1
East Asian Library	ILL Requests	Mar 7, 2007 12:00:00 AM	1
East Asian Library	Loans	Mar 1, 2007 12:00:00 AM	3
East Asian Library	Renewals	Feb 22, 2007 12:00:00 AM	1
East Asian Library	Renewals	Mar 5, 2007 12:00:00 AM	8
East Asian Library	Returns	Feb 21, 2007 12:00:00 AM	5
East Asian Library	Returns	Feb 28, 2007 12:00:00 AM	1
East Asian Library	Returns	Mar 1, 2007 12:00:00 AM	2
Entricot Steak	Hold Requests	Feb 22, 2007 12:00:00 AM	2
Entricot Steak	Hold Requests	Mar 7, 2007 12:00:00 AM	12
Entricot Steak	Loans	Feb 22, 2007 12:00:00 AM	2
Entricot Steak	Loans	Mar 6, 2007 12:00:00 AM	1
Entricot Steak	Loans	Mar 7, 2007 12:00:00 AM	3
Entricot Steak	Unknow	Mar 7, 2007 12:00:00 AM	9
Humanities Library	Hold Requests	Feb 28, 2006 12:00:00 AM	1
Humanities Library	Hold Requests	Feb 28, 2007 12:00:00 AM	3
Humanities Library	Hold Requests	Mar 5, 2007 12:00:00 AM	1
Humanities Library	Loans	Feb 21, 2007 12:00:00 AM	3
Humanities Library	Loans	Feb 28, 2007 12:00:00 AM	3
Humanities Library	Loans	Mar 5, 2007 12:00:00 AM	3

To group the report by Sublibrary, click the **Sub-Library Desc** column header. The column appears in yellow:

Sub Library Desc
East Asian Library
East Asian Library
East Asian Library
East Asian Library
East Asian Library
East Asian Library
East Asian Library
East Asian Library
East Asian Library
Entricot Steak
Entricot Steak

Now, click on  to group the report by Sub-Library Desc:

Sub Library Desc	Event Category Desc	Event Date	No of Events
East Asian Library	Hold Requests	Feb 21, 2007 12:00:00 AM	1
	ILL Requests	Mar 7, 2007 12:00:00 AM	1
	Loans	Mar 1, 2007 12:00:00 AM	3
	Renewals	Feb 22, 2007 12:00:00 AM	1
	Renewals	Mar 5, 2007 12:00:00 AM	8
	Returns	Feb 21, 2007 12:00:00 AM	5
	Returns	Feb 28, 2007 12:00:00 AM	1
	Returns	Mar 1, 2007 12:00:00 AM	2
East Asian Library			22
Entricot Steak	Hold Requests	Feb 22, 2007 12:00:00 AM	2
	Hold Requests	Mar 7, 2007 12:00:00 AM	12
	Loans	Feb 22, 2007 12:00:00 AM	2
	Loans	Mar 6, 2007 12:00:00 AM	1
	Loans	Mar 7, 2007 12:00:00 AM	3
	Unknow	Mar 7, 2007 12:00:00 AM	9
	Entricot Steak		

You can do the same for Event Category Desc too:

Sub Library Desc	Event Category Desc	Event Date	No of Events	
East Asian Library	Hold Requests	Feb 21, 2007 12:00:00 AM	1	
	Hold Requests		1	
	ILL Requests	Mar 7, 2007 12:00:00 AM	1	
	ILL Requests		1	
	Loans	Mar 1, 2007 12:00:00 AM	3	
	Loans		3	
	Renewals	Feb 22, 2007 12:00:00 AM	1	
		Mar 5, 2007 12:00:00 AM	8	
	Renewals		9	
	Returns	Feb 21, 2007 12:00:00 AM	5	
		Feb 28, 2007 12:00:00 AM	1	
		Mar 1, 2007 12:00:00 AM	2	
	Returns		8	
	East Asian Library			22
	Entricot Steak	Hold Requests	Feb 22, 2007 12:00:00 AM	2
Mar 7, 2007 12:00:00 AM			12	
Hold Requests		14		
Loans		Feb 22, 2007 12:00:00 AM	2	
		Mar 6, 2007 12:00:00 AM	1	

You now have a report grouped by Sublibrary and event category.

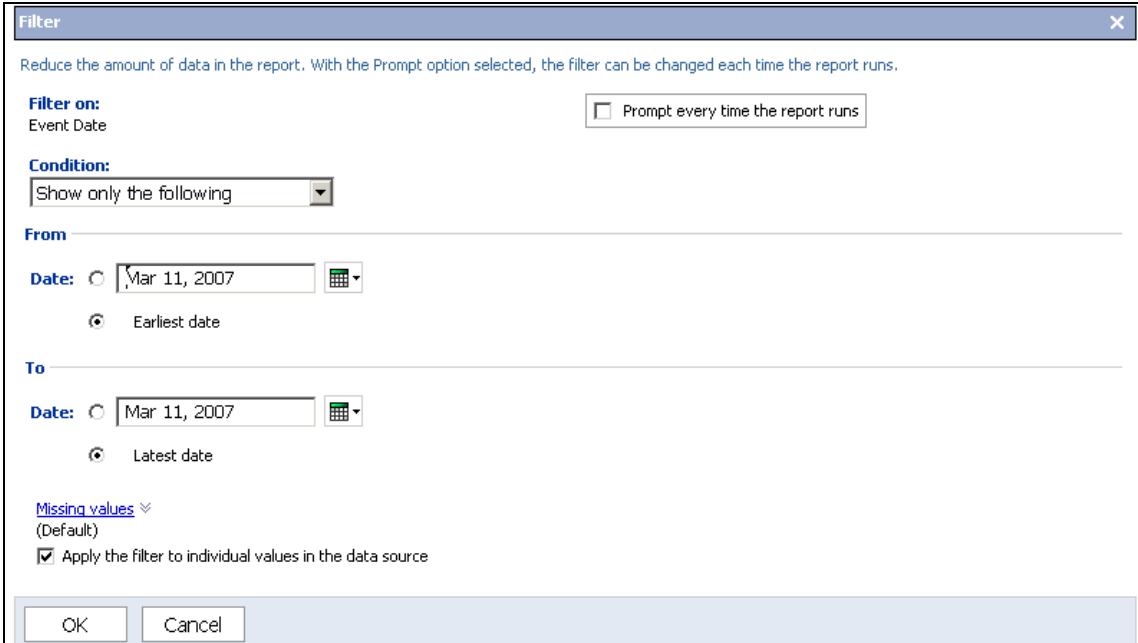
Showing/Hiding Sections

You can make filters for the report in order to show only selected sections.

To make a filter

1 Click on a column header, for example, **Event Date**. The column appears in yellow.

2 Click . The following screen is displayed:



Filter

Reduce the amount of data in the report. With the Prompt option selected, the filter can be changed each time the report runs.

Filter on:
Event Date Prompt every time the report runs

Condition:
Show only the following

From

Date: Mar 11, 2007 Earliest date

To

Date: Mar 11, 2007 Latest date

Missing values (Default)
 Apply the filter to individual values in the data source

OK Cancel

You can now choose specific dates or choose that a prompt always appears when running this report.

3 Make your changes and click **OK** to return to the **Report** screen.

You can choose to make a filter for sublibraries and for event categories too.

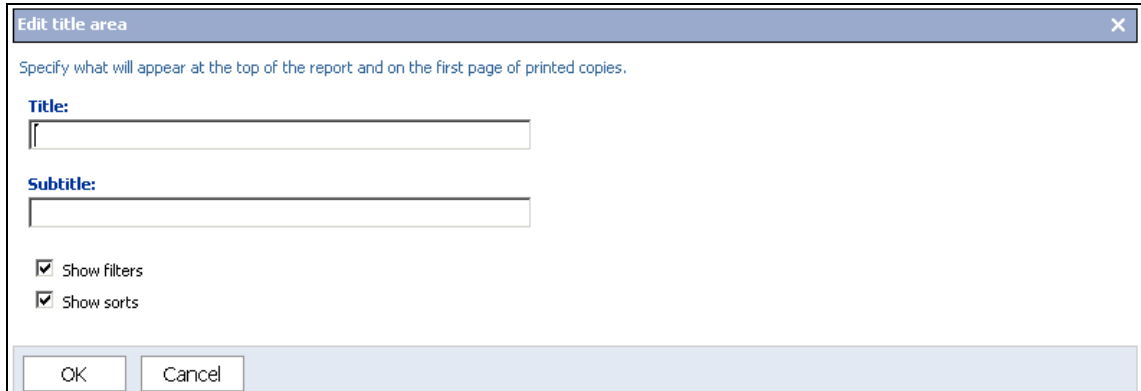
Filters created for a report are shown in the upper left corner of the screen:

-  [Sub Library Desc:](#)
-  [Event Category Desc:](#)
-  [Event Date:](#)

Naming Reports

Steps

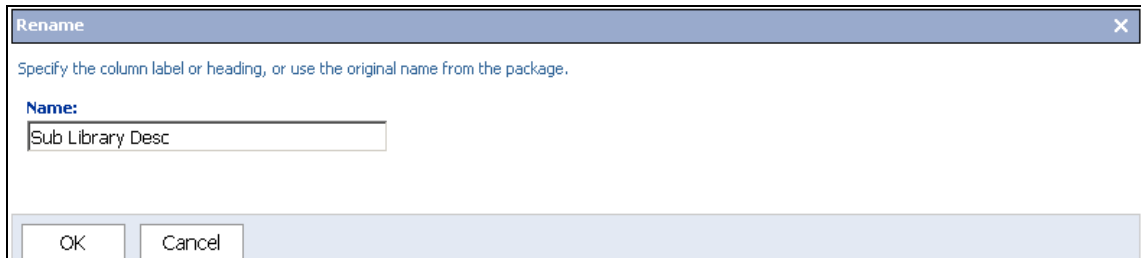
- 1 Click on the title. The following screen is displayed:





- 2 Now you can fill in the title and to add a subtitle. After you finish, click **OK**.

Changing Captions of Column Headers

You can also double click on the columns headers to change their captions. For example you can double-click the column header of **Sub-Library Desc** and change it to **Sublibrary**.



Saving Reports

The last stage in creating a report is saving it by clicking  **Save**, or  **Save as**. You are asked to give a name for the report, a description (optional), and a location. Remember that if you save a report in **My Folders**, only you are able to see it.

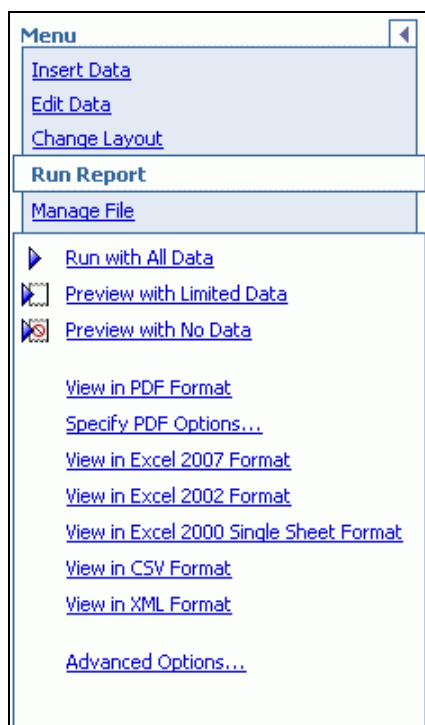
Here is a report filtered by sublibrary and dates:

Report's Title

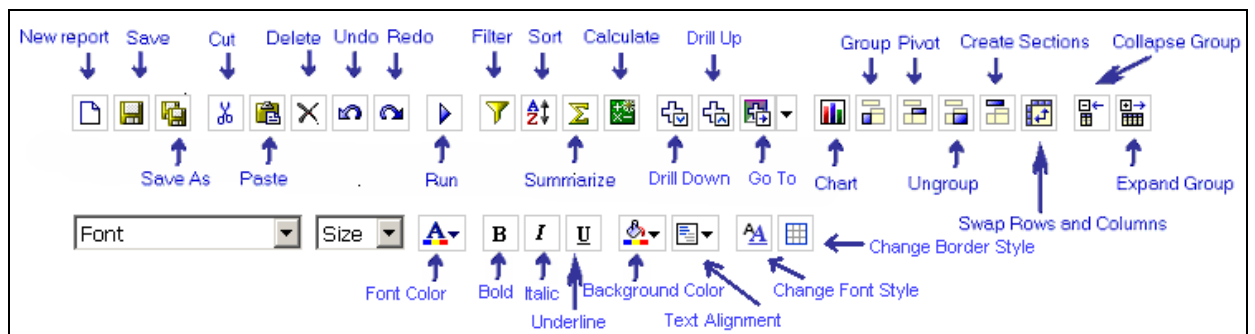
📌 [Event Date: On or after Mar 11, 2006](#) AND [Sub Library: East Asian Library, Economics Library, Entricot Steak](#)

Sub Library	Event Category	Event Date	No of Events
East Asian Library	Hold Requests	Feb 21, 2007 12:00:00 AM	1
	Hold Requests		1
	ILL Requests	Mar 7, 2007 12:00:00 AM	1
	ILL Requests		1
	Loans	Mar 1, 2007 12:00:00 AM	3
	Loans		3
	Renewals	Feb 22, 2007 12:00:00 AM	1
		Mar 5, 2007 12:00:00 AM	8
	Renewals		9
	Returns	Feb 21, 2007 12:00:00 AM	5
Feb 28, 2007 12:00:00 AM		1	
Mar 1, 2007 12:00:00 AM		2	
Returns		8	
East Asian Library			22
Entricot Steak	Hold Requests	Feb 22, 2007 12:00:00 AM	2
		Mar 7, 2007 12:00:00 AM	12
	Hold Requests		14
	Loans	Feb 22, 2007 12:00:00 AM	2
		Mar 6, 2007 12:00:00 AM	1
		Mar 7, 2007 12:00:00 AM	3

You can also run the report in one of the formats specified under **Run Format**:




More options are available on this screen:



For more information about these options, click **Help**.

Scheduling Reports

Reports can be scheduled to run on a specific time and day. To see the various options, choose a report and click the  icon next to it.

Follow up on the scheduled reports can be done from the **Schedules** Management options in the **IBM Cognos Administration** screens – accessed from the **Launch** dropdown menu. You can see the reports that run in a specific time frame in the **Activity** tab. You can see all the scheduled reports and manage them in the **Schedule** tab.

CHAPTER 4

Summaries of Pre-Authored Reports

Your ARC installation contains a large number of pre-authored reports that have been set up to meet common library needs for reporting. These reports have been arranged in a simple hierarchy according to subject and reporting perspective (see *Accessing pre-authored Reports* on page 15).

This chapter contains summaries of the pre-authored reports currently available, arranged according to category, in table format.

Acquisitions

General

Public Folders > Acquisitions > General

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
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General Acquisitions By Sub-Library	This report presents Acquisition information. It is grouped by Sub-Library and Title.	Which titles were bought for each Sub-Library? Which acquisition method was used?	Sub-Library, Acquisition Method	Sub-Library, Title, Order Number, Budget Number, Order Status, Acquisitions Method, Arrival Status	Query Studio
General Acquisitions Statistics By Sub-Library	This report presents statistics and detailed order information per Sub-Library, Order Type, Status, and Acquisition Method.	How many orders were made per each Sub-Library, Order type, and Status?	Sub-Library	Sub-Library, Order Type, Order Status, Acquisition Method, Number of Orders, Percent of Total Number of Orders	Query Studio

Orders

Public Folders > Acquisitions > Orders

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Canceled Orders by Order Status, Date, and Sub-Library	This is a report of orders that have been cancelled. It is grouped by Sub-Library (Ordering Unit) and Order Status.	How many orders were cancelled per each Sub-Library? Was it the library who canceled the orders or was it the vendor?	Order Status Date, Sub-Library, Ordering Unit	Sub-Library, Order Status, Date, Vendor Name, Number of Orders	Report Studio
Closed Orders by Order Status Date and Sub-Library	List of closed orders by Sub-Library (Ordering Unit) and Vendor.	How many orders are closed per each Sub-Library?	Order Status Date, Sub-Library, Ordering Unit	Sub-Library, Vendor Name, Order Number, Title	Report Studio
General Orders by Sub-Library	Report on orders grouped by Sub-Library and Vendor. It also contains Budget Number.	What titles were ordered? By which vendors? On which budgets?	Sub-Library, Acquisition Method	Sub-Library, Vendor Name, Budget Number, Order Number, Title	Query Studio
Monthly Order Statistics by Order Date, Budget, and Sub-Library	This is a payments report per Budget grouped by Sub-Library (Ordering Unit) and Order Year and Month.	How much was spent per month/year per each Sub-Library?	Order Date, Sub-Library, Budget Number, Ordering Unit	Sub-Library, Order Year and Month, Budget Number, Number of Orders, Total Local Sum	Report Studio
Order Numbers by Vendor Name	Report on Order Numbers grouped by Vendor Name.	Which Orders were made per each vendor?	No filters	Vendor Name, Order Number, Title	Query Studio
Orders by Budgets	This is an order report grouped by Budget Number.	Which Orders were purchased by which budget?	No filters	Budget Number, Order Number, Title	Query Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Orders by Order Date, Sub-Library, and Order Status	This is an order report grouped by (Ordering unit), Sub-Library, Order Status, Vendor Name, Budget Number, and Order Year and Month. It contains order information and title.	How much was spent?	Order Date, Sub-Library, Order Status, Budget Number, Ordering Unit	Sub-Library, Order status, Vendor Name, Budget Number, Order Year and Month, Order Number, Title, Local Sum, VAT Sum, Total Sum	Report Studio
Orders by Sub-Library, and Order Status	Report on Order Information (Order No., Order Year, Order Material type, Local Price) sectioned by Order Status and grouped by Vendor, Sub-Library (Ordering Unit), and Order Material Type.	How much do orders in a certain status cost?	Order Date, Sub-Library, Order Status, Ordering Unit	Order Status, Vendor Name, Sub-Library, Order Material Type, Order Year and Month, Local Price	Report Studio
Orders for Serials Purchased	Serial Order Report with Order No., Title, Publisher, ISBN and Original Sum grouped by Vendor Name.	Which serial orders were purchased by each vendor?	No filters	Vendor Name, Order Number, Title, Publisher, ISBN, Original Sum	Query Studio

Expenditure

Public Folders > Acquisitions > Expenditure

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Expenditure by Budget	This is an expenditure report grouped by Budget Number with Sub-Report by Vendors.	How much was paid for vendors? By which budget?	Budget Number	Budget Number, Vendor Name, Invoice	Report Studio
Expenditure by Sub-Library and Budget Open Date	This is a report showing local expenditure sum sorted by Sub-Library.	What were the global expenses in local sum per each Sub-Library?	Budget Open Date, Transaction Type: Invoice	Sub-Library, Local Sum	Query Studio
Expenditure by Vendor	This is an expenditure report using Vendor, Budget and Invoice Information sorted by Vendor with Sub-Reports per Budget.	Which vendor was paid by which budget?	Budget Open Date	Vendor Name, Budget Number, Invoice	Report Studio
Expenditure Report by Order Date, Sub-Library, and Item Material Type	This is an expenditure report grouped by Sub-Library (and Ordering Unit) and Item Material Type with sub reports by Item Material Type (showing Order Number, local and actual local prices).	How much was spent per Item Material Type and Sub-Library? By which order?	Order Date, Item Material Type, Sub-Library, Ordering Unit	Sub-Library, Item Material Type, Local Price, Actual Local Price	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Expenditure Report by Order Date, Sub-Library and Order Type	This is an expenditure report sorted by Sub-Library (and Ordering Unit) and Order Type with Sub-Report by Order Type (showing order Number, Local and Invoice Local Prices).	How much was spent per Order Type and Sub-Library? By which order?	Order Date, Order Type, Sub-Library, Ordering Unit	Sub-Library, Order Type, Local Price, Invoice Local Price	Report Studio
Expenditure Statistics by Budget	This is an expenditure statistics report sorted by year and open month presenting budget with expenditure details (sum and percentage).	How much was spent this year? On which budgets?	Budget Number	Year, Budget Open Month, Budget Number, Expenditure, Percentage of Local Sum	Report Studio

Budgets

Public Folders > Acquisitions > Budgets

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Budgets Transactions Report	This is a budget transaction report grouped by Budget Number and Transaction Type with Sub-Reports by Transaction Type (including Budget No., Transaction Type, Order No., Local Sum, VAT Sum, Total Local Sum, and information on whether it was paid).	Which transactions were made on a budget? What was the expense?	Budget Number, Transaction Type	Budget Number, Transaction Type, Local Sum, VAT Sum, Total Local Sum	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Transactions by Order Date and Budget	This report shows the number of events made on items purchased by a specific budget. The report is grouped by Order Number and Title. Dynamic filter on Item Status exists on the report itself.	How many events were made on items purchased by a specific budget?	Order Date Range, Budget Type, and later Budget Number	Order Number, Title, Barcode, Item Status, Number of Events	Report Studio
Number of Orders per Budget	This report generates number of orders per budget filtered by Budget Activity Status.	How many orders were fulfilled by each budget	Order Date Range, Budget Number Dynamic Filter: Budget Status	Budget Status, Budget Number, Number of Orders	Report Studio

Vendors and Claims

Public Folders > Acquisitions > Vendors & Claims

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Claims per Vendor	This is a report on Claims per Order which belong to a Vendor grouped by Sub-Library (and Ordering Unit) with a pie chart of claims per vendor per each Sub-Library.	How many claims were made?	Order Date, Sub-Library, Ordering Unit	Sub-Library, Vendor Name, Number of Orders, Number of Claims	Report Studio
Vendor Cancelled Orders By Sub-Library	This is a report on orders canceled by Vendors. It includes Vendor Name, Sub-Library (Ordering Unit), Order No., and Item Title.	Which orders were canceled? Which vendors canceled which orders?	Order Date, Sub-Library, Ordering Unit	Vendor, Sub-Library, Order Number, Title	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Vendor Performance Report	Report with charts on vendors with Highest No. of Orders, Vendors with Greatest Variance Between Listed and Actual Price, Vendors with Highest Number of Claims, Vendors with Highest Number of Cancellations, and Vendors with Highest Number of Items Not Supplied. The table elaborates the information relevant to the described charts. There is a dynamic filter of Minimum/Maximum Number of Orders'.	Which are the most problematic vendors? With which vendors should the library continue to work?	Order Date, Sub-Library	Vendor Name, Number of Orders, Number of Claims, Average Number of Claims per Order, Number of Cancellations by Vendor, Max Delivery Time, Number of Units Not Supplied, Listed Price, Actual Price, Price Variance per Order, Total Price Variance	Report Studio

Circulation Based on Events

Public Folders > Circulation Based on Events

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Activity On Items That Cost More Than... By Event Date, Minimum Cost, and Sub-Library	This is a circulation activity report containing information on Sub-Library, Collection Desc, Event Category, and Number of Events filtered by Item Price.	How many circulation events were made on items that cost more than a certain price? Was the purchase worthwhile?	Event Date, Minimum Cost, Sub-Library	Sub-Library, Collection, Event Description, Number of Events	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Desk, Transactions by Hour, and Event Category	This is a Circulation Desk Transactions Report sorted by Sub-Library, Week Day, Hour and Event Type Desc. Dynamic filter on the Time of Transaction exists.	Which are the main transactions held in a certain hour? How many actions are made per hour?	Event Date, Sub-Library, Event Category	Sub-Library, Event Day, Event Hour, Event Type, Number of Events	Report Studio
Circulation Desk, Transactions by Hour, and Event Type	This is a Circulation Transactions Report by Day of the Week and Hour sorted by Sub-Library. There is an Hour filter in the report itself.		Event Date, Sub-Library, Event Type	Sub-Library, Event Day, Event Hour, Event Category, Number of Events	Report Studio
Circulation Transactions by Event Category and Sub-Library	This is a Circulation Statistics Report sorted by Circulation Transaction Type, Sub-Library, Patron, and Item Statuses.		Event Date, Event Category	Event Category, Sub-Library, Patron Status, Item Status, Number of Events	Report Studio
Circulation Statistics by Patron Category	This is a Circulation Statistics Report with Patron Status, Patron Type and Circulation Transaction type (Event Category) that can be filtered by Patron Status Desc, Patron Type Desc, and Event Category Desc.		Event Date, Event Category, Patron Status, Patron Type	Patron Status, Patron Type, Event Category, Number of Events	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Transactions Count By Event Category	This is a Circulation Transaction Statistical Report sorted by Sub-Library and Transaction Type.		Event Date and Time, Event Category	Sub-Library, Event Category, Number of Events	Report Studio
Items Circulated by Publication Year	This report shows a list of titles organized by ascending year that were circulated in a defined date range.	Are the circulation transactions in the library made on up to date material?	Event Date Selection, Sub-Library, Event Type, Call Number	Bibliographic Publication Date (year), Title, Barcode, Call Number, Number of Events	Report Studio
Items Without Circulation Events	The report shows circulation activities grouped by Sub-Library and Collection. The report also includes items without events. Dynamic filter of Number of Events exists.	Which are the items that were less circulated? Which items were not circulated at all?	Event Date, Event Type, Item Status, Material Type, Sub-Library, Call number	Sub-Library, Collection, Title and Call Number. The report is grouped by Sub-Library, Collection, Title	Report Studio
Items without Circulation Events for Call Numbers Range	The report shows circulation activities grouped by Sub-Library, Call Numbers and Collection. The report also includes items without events. Dynamic filter of Number of Events exists.	Which are the items that were less circulated? Which items were not circulated at all?	Event Date, Event Type, Item Status, Material Type, Sub-Library, Call number	Sub-Library, Collection, Title and Call Number. The report is grouped by Sub-Library, Collection, Title	Report Studio
Number of Circulation Transactions per Cataloger	This is a Circulation Transaction Report grouped by Cataloger name/IP.	How many Circulation Events were handled by each cataloger?	Event Date and Hour, Event Cataloger, Sub-Library, Event Type, Cataloger Name or IP Station	Cataloger/IP station, Event Type, Number of Events	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Ratio between Circulation Events and Corresponding Items	This is a Circulation Report grouped by Sub-Library, Collection and Title. It shows the Ratio of Circulation Transactions and Number of Items.	Which items need weeding? Which items are in high demand?	Event Date, Event Type, Item Status, Material Type, Sub-Library, Call number, Ratio	Sub-Library, Collection, Title, Number of Items, Number of Events, Ratio of Circulation Transactions/ Number of Items	Report Studio
Report of Loans, Returns and Renewals	This is a Circulation Transactions Report on Loans, Returns and Renewals by Sub-Library with Sub Report by Sub-Library.	How many events were made per each Sub-Library?	Event Date, Sub-Library, Three Event Type filters for Loans, Returns and Renewals, Call Number	Sub-Library, Number of Loans, Numbers of Returns, Number of Renewals, Number of Other Events, Total Number of Events	Report Studio
Threshold of Item Circulation Usage between dates	This is a report that shows the threshold of Item Circulation Usage between dates set in the filter. It is sorted by Sub-Library and Collection, includes Item Title and Barcode.		Event Date	Sub-Library, Collection, Title, Barcode, Number of Events, Last Loan Date	Report Studio

Circulation and Cash

Loans

Public Folders > Circulation and Cash > Loans

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
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Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Loan Statistics	Loan Statistics Report sorted by Sub-Library and Patron Status. Grouped by Sub-Library.	How many loans were made by Patron Statuses per each Sub-Library?	Loan Date, Sub-Library, Patron Status	Sub-Library, Patron Status, Number of Loans	Report Studio
Loans per Sub-Library	This is a Loans Report per Sub-Library with pie charts.	How many loans were made per each Sub-Library?	No filters	Sub-Library, Number of Loans, Percent of Total Number of Loans	Query Studio
Number of Loans	This is a report of the number of loan events by Sub-Library by percentage with a chart.	How many loans were made per each Sub-Library?	Loan Date, Item Material Type	Sub-Library, Number of Events, Percent of Total number of Loans	Report Studio
Number of Loans per Title	This is a statistical report of loans per item (with Title and Barcode information) sorted and grouped by Sub-Library.	How many loans were made per each title between chosen dates?	Loan Date, Sub-Library, Title	Sub-Library, Title, Barcode, Number of Loans	Report Studio

Returns

Public Folders > Circulation and Cash > Returns

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Returns	This report shows Number of Returns by Sub-Library. This report contains a chart.	How many returns were made per each Sub-Library?	Return Date	Sub-Library, Number of Returns	Report Studio

Renewals

Public Folders > Circulation and Cash > Renewals

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Renewals	This report shows Number of Renewals by Sub-Library. This report contains a chart.	How many renewals were made per each Sub-Library?	Renewal Date and Hour	Sub-Library, Number of Renewals	Report Studio
Renewals by Renewal Type	This report shows Number of Renewals by Sub-Library, Event Type, Patron Status, and Item Status.	How many renewals were made by Patron Status per library? How many renewals were made per Items Status?	Renewal Date, Sub-Library, Renewal Type, Patron Status, Item Status	Sub-Library, event Type (renewal), Patron Status, Item Status, Number of Events	Report Studio

Patrons

Public Folders > Circulation and Cash > Patrons

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Percentage Report by Sub-library and Patron Category	This is a Circulation Report with Patron Status and Patron Type sectioned by Sub-Library with Count and Percentage of Events by Sub-Library.	How many Circulation Events were made by Patron Status? How many Circulation Events were made by Patron Type?	Event Date	Sub-Library, Patron Status, Patron Type, Event Category, Number of Events, Percent of Total Number of Events.	Query Studio
Circulation Percentage Report by Sub-Library and Patron Status	This is a Circulation Percentage Report with Patron Status and Transaction Category sorted by Sub-Library and Patron Status with Percentage of Events by Sub-Library.	How many Event Transactions were made per each Patron Status per Sub-Library?	Event Date	Sub-Library, Patron Status, Transaction Category, Number of Events, Percent of Total Number of Events.	Query Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Detailed Patron Statistics	The report columns are: 1.Patron Status Description (in cases where Patron Status field is empty in the z305 record, the system adds an indication that no translation for the status is found ("unknown", for example) and adds Patron Sub-Library Code); 2.No. of Local Patrons (total count of records in z305); 3.Distinct No of Local Patrons (distinct count of records in z305 that also have record in z303); 4.No. of Active Valid Patrons (total count of records in z305 that also have valid (not expired) record in z303); 5.Distinct No of Valid Global Patrons (distinct count of records in z305 that also have valid (not expired) record in z303); 6.No of Active Local Patrons in the Last 12 Months (total count of records in z305 that also have valid (not expired) record in z303, and performed any activity in the last 12 month); 7.Distinct No of Active Local Patrons in the Last 12 Months (distinct count of records in z305 that also have valid (not expired) record in z303, and performed any activity in the last 12 month).	How many patrons actually made transactions in the library? Are my patrons active? How many patrons are registered in the library?	No filters	Patron Status, Number of Local Patrons, Distinct Number of Local Patrons, Number of Active Valid Patrons, Distinct Number of Valid Global Patrons, Number of Active Local Patrons in the Last 12 Months, Distinct Number of Active Local Patrons in the Last 12 Months	Report Studio
Number of Lost and Claimed Returned Items by Patron Status	This is a report of Lost and Claimed items with Patron Status and Event Category sectioned by Sub-Library.	Which are the statuses that lose items the most?	Event Date, Sub-Library, Patron Status	Sub-Library, Patron status, Event Category, Number of events (Lost and Claimed Returned Items)	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of New Patrons	This report contains a list of new patrons sorted by Sub-Library and by Patron Status.	How many new local patrons per status and by type are in a Sub-Library?	Patron's Open Date, Sub-Library, Patron Status, Patron Type	Sub-Library, Patron Status, Number of Local Patrons	Report Studio

Cash

Public Folders > Circulation and Cash > Cash

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Cash Payment Report	This is a cash payment report with Cataloger, Payment Receipt, Barcode, Patron ID, No. of Cash Transactions, and Sums sectioned by Sub-Library.	How many cash transactions were made per each type? How much money was paid?	Payment Date, Sub-Library, Cash Type, Cataloger	Sub-Library, Cash Type, Payment Cataloger, Payment Receipt Number, Barcode, Patron ID, Number of Cash Transactions, Sum, VAT Sum, Net Sum	Report Studio
Open Fines Report	This is an open fines report with Patron Status, Item Status, VAT Sum, Sum, and Net Sum by Patron Status.	What cash transactions are still open?	Cash Transaction Date, Sub-Library	Patron Status, Item Status, Sum, VAT Sum, Net Sum	Report Studio
Paid Fines Report	This is a paid fines report with Patron Status, Item Status, VAT Sum, Sum, and Net Sum by Patron Status.	What cash transactions were already paid?	Cash Transaction Date, Sub-Library	Patron Status, Item Status, Sum, VAT Sum, Net Sum	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Patrons with High Fines	This is a report of high fines by Patron with sub-report including Patron's Name, Type and Status. Note that this report includes only the following cash transaction types: 0003, 0014, 0050 and 0051.	How much money do patrons with high fines owe? This report deals only with fines and does not include other charges.	Cash Transaction Date, Sub-Library, Owing More than	Patron Name, Sum, VAT Sum, Net Sum	Report Studio
Total Fines Report	This is a total fines report by Cash Type with pie charts.	What are the figures per each Cash Type?	Cash Transaction Date, Sub-Library	Cash Type, Paid Fines, Open Fines, Total Fines	Report Studio

ILL

Public Folders > Circulation and Cash > ILL

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
List of Items Provided to Other Libraries	This report contains a list of items provided to other libraries grouped by ILL partner name. There is a Sub Report which includes bibliographic and item information.	What titles are requested the most by other libraries?	ILL Partner ID, Material Type, Title	Partner Name, Title, Publisher, Author, Language, Number of Items	Report Studio

List of Items Received from Other Libraries	This report contains a list of items received from other libraries grouped by Supplier Name. There is a Sub Report which includes bibliographic and item information.	What titles are requested the most from other libraries? Should we buy the most requested titles?	ILL Supplier, Material Type, Title	Supplier Name, Title, Publisher, Author, Language, Number of Items	Report Studio
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Requests

Public Folders > Circulation and Cash > Requests

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Hold Request Statistics	This is a Hold Request Statistics Report with Request Status, Count and Percentage sorted by Hold Request Status. The report is on Current Hold Requests (Z37) Only. The report includes graphs.	How many current requests are per each request status?	Hold Request Date, Sub-Library, Request Status, Print Status	Hold Request Status, Number of Requests, Percentage of Total Requests.	Report Studio

Booking

Public Folders > Circulation and Cash > Booking

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Booking Requests between Dates	This report presents statistical information per Library and Booking Requests Date	How many booking requests were made per each library in given dates?	Booking Requests Date, Sub-Library	Sub-Library, number of Requests	Report Studio
Number of Booking Requests Fulfilled vs. Not Fulfilled between Dates	This report shows all booking requests that were put in action vs. those that were not per Sub-Library	How many booking requests were fulfilled? How many were not fulfilled?	Booking Requests Date, Sub-Library	Sub-Library, Fulfilled Requests, Not Fulfilled Requests	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Booking Requests that are fulfilled now	This report presents Booking Requests that are active now, which are those booking requests that have a corresponding loan record (not history record), with loan source equal to 'b'. The report is grouped by Sub-Library.	How many Booking Requests are active right now?	Sub-Library	Sub-Library, Number of Requests	Report Studio
Number of Booking Requests that start between dates.	This report presents Booking Requests that start in a range of booking request dates (Z37-BOOKING-START-DATE).	How many Booking Requests start in the given dates?	Booking Requests Date, Sub-Library	Sub-Library, Number of Requests	Report Studio
Number of Booking Requests where Owing Library Differs from Pickup Location	This report presents Booking Requests in which the Sub-Library of the item is different from the Pick Up Location.	How many Booking Requests were picked up in a location which is not the item's location?	Booking Requests Date, Owing Sub-Library	Sub-Library, Number of Requests	Report Studio

Patrons

Public Folders > Patrons

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Detailed Patron Statistics	The report columns are: 1.Patron Status Description (in cases where Patron Status field is empty in the z305 record, the system adds an indication that no translation for the status is found ("unknown", for example) and adds Patron Sub-Library Code); 2.No. of Local Patrons (total count of records in z305); 3.Distinct No of Local Patrons (distinct count of records in z305 that also have record in z303); 4.No. of Active Valid Patrons (total count of records in z305 that also have valid (not expired) record in z303); 5.Distinct No of Valid Global Patrons (distinct count of records in z305 that also have valid (not expired) record in z303); 6.No of Active Local Patrons in the Last 12 Months (total count of records in z305 that also have valid (not expired) record in z303, and performed any activity in the last 12 month); 7.Distinct No of Active Local Patrons in the Last 12 Months (distinct count of records in z305 that also have valid (not expired) record in z303, and performed any activity in the last 12 month).	How many patrons actually made transactions in the library? Are my patrons active? How many patrons are registered in the library?	No filters	Patron Status, Number of Local Patrons, Distinct Number of Local Patrons, Number of Active Valid Patrons, Distinct Number of Valid Global Patrons, Number of Active Local Patrons in the Last 12 Months, Distinct Number of Active Local Patrons in the Last 12 Months	Report Studio

Lost Items by Patron Status	This is a Lost Items Report sorted and grouped by Patron Status.	What are the titles which were lost? Which Patron Statuses lose the most items?	No filters	Patron Status, Title, Event Date, Local Price, Actual Local Price	Report Studio
Number Of New Patrons	This report contains a list of new patrons sorted by Sub-Library and by Patron Status.	How many new local patrons per status and by type are in a Sub-Library?	Patron's Open Date, Sub-Library, Patron Status, Patron Type	Sub-Library, Patron Status, Number of Local Patrons	Report Studio

Collection Management

Collection Management

Public Folders > Collection Management > Collection Management

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Items Added to Stock by Library	This is a report on items added to stock by library and sorted by Sub-Library and Item Material Type with Percentage per Material Type and Sub-Library.	How many items were added to My Collection?	No filters	Sub-Library, Item Material Type, Number of Items, Percent of Total Number of Items.	Query Studio
Items Added to Stock by Material Type and Call No. Selection	This is a report on items added to stock by Material Type sorted by Item Material Type and Sub-Library. It includes Collection Number of Events and Item Price.	How many items are there per each Material Type? How much do they cost?	Arrival Date, Sub-Library, Call number	Material Type, Sub-Library, Collection, Number of Items, total Cost	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Items Details per Title by Call Number	The report presents the Number of Items and Item Information for each title.	How many Items per Title exist in the collection? What is their information?	Call Number, Sub-Library	Title, Sub-Library, Collection, Item Status, Primary Call No, Barcode	Report Studio
Items Held, Added, Withdrawn	This is a report on Items Held, Added, and Withdrawn by Sub-Library and Collection with Sub-Reports. It includes info on Items Added, Withdrawn, Held in a Certain Period, and Held Today.	What are the changes in the collection inventory?	Item Open Date, Process Status, Material Type, Sub-Library, Collection, Item Material Type, Acquisition Method, Call Number	Sub-Library, Collection, Process Status, Acquisition Method, Material Type, Items Held at Beginning of Period, Withdrawn, Net Number of Items Added, Items Held at End of Period, Items Held Today	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Items Not Issued in Defined Date Range	This is an items report of items not loaned in defined date range. The report is sorted by call number and title. It includes Barcode, Item Status and Last Loan Date.	Are newly purchased items being used? Which items are not being used?	Loan Dates, Item Open Date/Arrival Date, Item Status, Sub-Library, Call Number	Sub-Library section under it, the following columns exist: Call Number, Title, Barcode, Item Status, Last Loan Date, Arrival Year and Month	Report Studio
Items with Call No. Selection	This is a detailed report on items containing Collection Name, Item Status, Process Status, Title, Barcode, and Primary Call Number Description sorted Sub-Library and filtered by Call Number.	What is the item's information of my collection?	Call number, Sub-Library	Sub-Library, Collection, Primary Call No, Title, Item Status, Process Status, Material Type, Barcode	Report Studio
Monographs and Series Purchased	This is an Items Report of monographs and serials purchased between defined order dates. The report is sorted by Sub-Library, Acquisition Method, Order Type, and Item Material Type. It includes Item Title, Order Number, Item Average Price, and Number of Items.	How many items exist in the collection per each Sub-Library and Acquisition Method?	Order Date, Acquisition Method, Sub-Library, Item Material Type	Sub-Library, Acquisition Method, Order Type, Item Material Type, Title, Order Number, Item Average Price, Number of Items	Report Studio
New Accessions List	This report contains a list of titles grouped by Sub-Library and Collection.	What are the new books in the collection?	Bibliographic Open Date, Sub-Library, Item Material Type, Call Number	Sub-Library, Collection, Title	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number Of Items by Item Status, Sub-Library and Collection	This is a report on Number of Items by Sub-Library and Collection with Item Percentage per Collection. This report contains a pie chart.	How many Item Statuses per Item Status are there in the collection?	No filters	Sub-Library, Collection, Item Status, Number of Items, Percent from Total Number of Items	Report Studio
Number of Items by Material Type	This is a report on items by Item Material Type with No. of Items and No. of Titles. This report contains a pie chart.	How many items are in the collection per item each material type?	Open Date/Arrival Date, Sub-Library, Call Number	Item Material Type, Number of Titles, Number of Items	Report Studio
Number of Items by Process Status per Library	This is report on Number of Items by Process Status sorted by Sub-Library with Sub-Report by Process Status containing bibliographic information.	How many items are in the collection per each Process Status?	Item Open Date, Sub-Library, Process Status	Sub-Library, Process Status, Number of Items, Percent per Sub-Library	Report Studio
Number of Owned Materials	This is a report by Item Process Status with No. of Items and No. of Titles. This report contains a pie chart.	How many items are in the collection per item each Item Process Status?	Open Date/Arrival Date, Process Status, Call Number	Process Status, Number of Titles, Number of Items	Report Studio

Serials

Public Folders > Collection Management > Serials

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Claims (Issues) per Vendor	This is a Statistical Claims Report sorted by Sub-Library and Vendor Name.	How many claims were made per each Sub-Library?	Claim Date	Sub-Library, Vendor Name, Title, Number of Claims	Query Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Current Serials by Acquisition Method	This is a Statistical Report on the currently available serials sorted by Sub-Library and Acquisition Method.	Which serials exist in my collection?	Sub-Library, Acquisition Method	Sub-Library, Acquisition Method, Title, Order Number, Number of Items	Report Studio
Serial Titles by Acquisition Method	This is a detailed serials report grouped by Sub-Library and Collection.	What is the purchase and bibliographic information per serials purchased between given dates?	Arrival Date, Acquisition Method, Sub-Library	Sub-Library, Collection, Title, Publisher, Acquisition Method, Order Number, Number of Items	Report Studio

Course Reading

Public Folders > Collection Management > Course Reading

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Report of Number of Items by Instructor	This report presents information from course reading including Instructor Name, Course Name, Doc Number, Title, and Barcode Sorted by Instructor.	What titles in my collection belong to course reading?	No filters	Instructor Name, Course Name, Document Number, Title, Barcode	Report Studio

OPAC

Public Folders > OPAC

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Help Function Usage	This report contains statistics of Help Function Usage Patron Status. The report contains a pie chart and sub report containing usage charts per hour.	Which patron statuses use 'Help' the most? When do they use it (or when do they need help the most)?	OPAC Transaction Date, Patron Status	Patron Status, Transaction Date, Number of OPAC Transactions	Report Studio
Number of Searches with Zero Results	This report contains statistics of the searches which retrieved zero results per Patron Status. There is a Sub Report containing the query itself.	Which Patron Status gets zero results the most? Why? Is the patron doing a wrong incorrectly?	OPAC Transaction Date	Patron Status, Transaction Type, Number of OPAC Transactions	Report Studio
OPAC Usage by IP Station	The report contains IP of the address from which the patron entered the Web OPAC. It contains Number of Transactions and their Percentage Out of Total.	From where do patrons enter the Web OPAC more? From home? From the university? Where is the most popular place to enter the Web OPAC within the university?	OPAC Transaction Date, Work Station IP	Work Station IP, Number of OPAC Transactions, Percentage (out of total)	Report Studio

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
OPAC Usage by Patron Status	This report presents the common actions that users with the same patron status can do.	How many OPAC transactions were made by each Patron Status?	OPAC Transaction Date Selection, Patron Status	Transaction Type, Patron Status, Number of OPAC Transaction, Percentage per OPAC Transaction	Report Studio
Report On SDI Transactions	This report contains statistics on SDI usage. It also contains a chart comparing Number of SDI Transactions to Total OPAC Transactions.	How many SDI transactions were made in defined date range?	OPAC Transaction Date, Patron Status	Patron Status, Number of OPAC Transactions, Number of SDI Transactions	Report Studio
Statistics on OPAC Access	This is a report of OPAC transactions and sessions. It contains 3 charts dealing with OPAC usage.	Which are the busiest hours? Which are the busiest days?	OPAC Transaction Date	First table: Transaction Type, Number of OPAC Transactions, Percentage out of Total Transactions. Second table: Transaction Date, Transaction Day Part, Transaction Type, Number of OPAC Transactions	Report Studio
Statistics On OPAC Usage by Time Of Day	This report contains statistics on OPAC usage by day part. This report contains dynamic filters and a chart.	Which part of the day is the busiest in terms of OPAC usage?	OPAC Transaction Date	Transaction Day Part, Transaction Type, Number of OPAC Transactions	Report Studio

Bibliographic Data

Public Folders > Bibliographic Data

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Bibliographic Records by Format	This report shows the Number Of Bibliographic Records per Format.	How many titles are there per each format?	Sub-Library and Collection	Sub-Library, Collection Format, Title	Report Studio
Number of Bibliographic Records by Language	This report shows the Number of Bibliographic Records per Language.	What are the languages in my collection and what is their relative percentage?	No filters	Language, Number of Titles	Report Studio
Statistics by Cataloger	This report presents Cataloging Statistics per Cataloger.	What is the capacity of the catalogers?	No filters	Cataloger, Number of Records, Percent of Total Number of Records	Query Studio

ETL

Public Folders > ETL

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
ETL Duration Graph	This is a graph of process codes and minutes. It shows if there was a unique ETL run	What is the average time of the ETL run?	ETL Date Range	Process codes, Minutes	Report Studio
ETL Status	This report follows the ETL process and present problems in data.	What went wrong with the last ETL process? From where do all the 'Unknown' entries come from?	ETL Date Range	Process Code, Process Status, Start, End, ETL Report, Data Quality, Duration	Report Studio

Loans

Public Folders > Loans

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Loan Statistics	Loan Statistics Report sorted by Sub-Library and Patron Status sorted by Sub-Library.	How many loans were made by Patron Statuses per each Sub-Library?	Loan Date, Sub-Library, Patron Status	Sub-Library, Patron Status, Number of Loans	Report Studio
Loans per Sub-Library	This is a Loans Report per Sub-Library with pie charts.	How many loans were made per each Sub-Library?	No filters	Sub-Library, Number of Loans, Percent of Total Number of Loans	Query Studio

Number of Loans per Title	This is a statistical report of loans per item (with Title and Barcode information) sorted and sorted by Sub-Library.	How many loans were made per each title between chosen dates?	Loan Date, Sub-Library, Title	Sub-Library, Title, Barcode, Number of Loans	Report Studio
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Cash

Public Folders > Cash

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Cash Payment Report	This is a cash payment report with Cataloger, Payment Receipt, Barcode, Patron ID, No. of Cash Transactions, and Sums sorted by Sub-Library.	How many cash transactions were made per each type? How much money was paid?	Payment Date, Sub-Library, Cash Type, Cataloger	Sub-Library, Cash Type, Payment Cataloger, Payment Receipt Number, Barcode, Patron ID, Number of Cash Transactions, Sum, VAT Sum, Net Sum	Report Studio
Open Fines Report	This is an open fines report with Patron Status, Item Status, VAT Sum, Sum, and Net Sum sorted by Patron Status.	What cash transactions are still open?	Cash Transaction Date, Sub-Library	Patron Status, Item Status, Sum, VAT Sum, Net Sum	Report Studio
Paid Fines Report	This is a paid fines report with Patron Status, Item Status, VAT Sum, Sum, and Net Sum sorted by Patron Status.	What cash transactions were already paid?	Cash Transaction Date, Sub-Library	Patron Status, Item Status, Sum, VAT Sum, Net Sum	Report Studio

Patrons with High Fines	This is a report of high fines sorted by Patron with sub-report including Patron's Name, Type and Status. Note that this report includes only the following cash transaction types: 0003, 0014, 0050 and 0051.	How much money do patrons with high fines owe? This report deals only with fines and does not include other charges.	Cash Transaction Date, Sub-Library, Owing More than	Patron Name, Sum, VAT Sum, Net Sum	Report Studio
Total Fines Report	This is a total fines report sorted by Cash Type with pie charts.	What are the figures per each Cash Type?	Cash Transaction Date, Sub-Library	Cash Type, Paid Fines, Open Fines, Total Fines	Report Studio

Requests

Booking

Public Folders > Requests > Booking

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number Of Booking Requests Between Dates	This report presents statistical information per Library and Booking Requests Date	How many booking requests were made per each library between the given dates?	Booking Requests Date, Sub-Library	Sub-Library, number of Requests	Report Studio
Number Of Booking Requests Filled Vs Not Filled Between Dates	This report shows all booking requests that were put in action vs. those that were not, per Sub-Library	How many booking requests were filled? How many were not filled?	Booking Requests Date, Sub-Library	Sub-Library, Fulfilled Requests, Not Fulfilled Requests	Report Studio

Number Of Booking Requests that are Filled Now	This report presents Booking Requests that are active now, which are those booking requests that have a corresponding loan record (not history record) with a loan source equal to 'b'. The report is sorted by Sub-Library.	How many Booking Requests are active right now?	Sub-Library	Sub-Library, Number of Requests	Report Studio
Number Of Booking Requests that Start Between the Dates	This report presents Booking Requests that start in a range of booking request dates (Z37-BOOKING-START-DATE).	How many Booking Requests start between the given dates?	Booking Requests Date, Sub-Library	Sub-Library, Number of Requests	Report Studio
Number Of Booking Requests where the Owing Library differs from the Pickup Location	This report presents Booking Requests in which the Sub-Library of the item is different from the Pick Up Location.	How many Booking Requests were picked up in a location which is not the item's location?	Booking Requests Date, Owing Sub-Library	Sub-Library, Number of Requests	Report Studio

Hold Requests

Public Folders > Requests > Hold Requests

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
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Hold Request Statistics	This is a Hold Request Statistics Report with Request Status, Count and Percentage sorted by Hold Request Status. The report is only on Current Hold Requests (Z37). The report includes graphs.	How many current requests are per each request status?	Hold Request Date, Sub-Library, Request Status, Print Status	Hold Request Status, Number of Requests, Percentage of Total Requests.	Report Studio
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Photocopy Requests

Public Folders > Requests > Photocopy Requests

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Photocopy Request Statistics	This is a Photocopy Request Statistics Report with Request Status, Count and Percentage sorted by Photocopy Request Status. The report is only on Current Photocopy Requests (Z38). The report includes graphs.	How many current Photo requests are per each request status?	Photo Request Date, Sub-Library, Request Status, Print Status	Photo Request Status, Number of Requests, Percentage of Total Requests.	Report Studio

Events

Loans

Public Folders > Events > Loans

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Loans	This is a report of the number of loan events sorted by Sub Library and by percentage, with a chart.	How many loans were made per each Sub Library?	Loan Date, Item Material Type	Sub-Library, Number of Events, Percent of Total number of Loans	Report Studio

Miscellaneous

Public Folders > Events > Miscellaneous

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Desk Transactions sorted by Hour and Event Category	This is a Circulation Desk Transactions Report sorted by Sub Library, Week Day, Hour and Event Type Desc. A dynamic filter on the Time of Transaction exists.	What are the main transactions held in a certain hour? How many actions are made per hour?	Event Date, Sub-Library, Event Category	Sub-Library, Event Day, Event Hour, Event Type, Number of Events	Report Studio
Circulation Desk Transactions sorted by Hour and Event Type	This is a Circulation Transactions Report sorted by Day of the Week and Hour, sorted by Sub-Library. There is an Hour filter in the report itself.		Event Date, Sub-Library, Event Type	Sub-Library, Event Day, Event Hour, Event Category, Number of Events	Report Studio

Circulation Statistics sorted by Patron Category	This is a Circulation Statistics Report with Patron Status, Patron Type and Circulation Transaction type (Event Category) that can be sorted by Patron Status Desc, Patron Type Desc, and Event Category Desc.	Event Date, Event Category, Patron Status, Patron Type	Patron Status, Patron Type, Event Category, Number of Events	Report Studio
Circulation Transactions sorted by Event Category and Sub Library	This is a Circulation Statistics Report sorted by Circulation Transaction Type, Sub Library, Patron, and Item Statuses.	Event Date, Event Category	Event Category, Sub-Library, Patron Status, Item Status, Number of Events	Report Studio
Circulation Transactions Count Sorted by Event Category	This is a Circulation Transaction Statistical Report sorted by Sub-Library and Transaction Type.	Event Date and Time, Event Category	Sub-Library, Event Category, Number of Events	Report Studio
Number of Circulations Transaction per Cataloger	This is a Circulation Transaction Report sorted by Cataloger name/IP.	How many Circulation Events were handled by each cataloger?	Event Date and Hour, Event Cataloger, Sub-Library, Event Type, Cataloger Name or IP Station	Report Studio

Report of Loans, Returns and Renewals	This is a Circulation Transactions Report on Loans, Returns and Renewals sorted by Sub Library with Sub Report sorted by Sub Library.	How many events were made per each Sub Library?	Event Date, Sub Library, Three Event Type filters for Loans, Returns and Renewals, Call Number	Sub Library, Number of Loans, Numbers of Returns, Number of Renewals, Number of Other Events, Total Number of Events	Report Studio
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Patrons

Public Folders > Events > Patrons

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Percentage Report sorted by Sub-Library and Patron Category	This is a Circulation Report with Patron Type sorted by Sub-Library with Count and Percentage of Events sorted by Sub-Library.	How many Circulation Events were made by Patron Status? How many Circulation Events were made by Patron Type?	Event Date	Sub-Library, Patron Status, Patron Type, Event Category, Number of Events, Percent of Total Number of Events.	Query Studio
Circulation Percentage Report sorted by Sub-Library and Patron Status	This is a Circulation Percentage Report with Patron Status and Transaction Category sorted by Sub-Library and Patron Status with Percentage of Events sorted by Sub-Library.	How many Event Transactions were made per each Patron Status per Sub-Library?	Event Date	Sub-Library, Patron Status, Transaction Category, Number of Events, Percent of Total Number of Events.	Query Studio

Number of Lost and Claimed Returned Items sorted by Patron - Status	This is a report of Lost and Claimed items with Patron Status and Event Category sorted by Sub-Library.	Which are the statuses that lose items the most?	Event Date, Sub-Library, Patron Status	Sub-Library, Patron status, Event Category, Number of events (Lost and Claimed Returned Items)	Report Studio
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Renewals

Public Folders > Events > Renewals

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Renewals	This report shows Number of Renewals sorted by Sub-Library. This report contains a chart.	How many renewals were made per each Sub-Library?	Renewal Date and Hour	Sub-Library, Number of Renewals	Report Studio
Renewals sorted by Renewal Type	This report shows Number of Renewals sorted by Sub-Library, Event Type, Patron Status, and Item Status.	How many renewals were made by Patron Status per library? How many renewals were made per Items Status?	Renewal Date, Sub-Library, Renewal Type, Patron Status, Item Status	Sub-Library, event Type (renewal), Patron Status, Item Status, Number of Events	Report Studio

Returns

Public Folders > Events > Returns

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Returns	This report shows Number of Returns sorted by Sub-Library. This report contains a chart.	How many returns were made per each Sub-Library?	Return Date	Sub-Library, Number of Returns	Report Studio

Acquisition Orders

Budgets

Public Folders > Acquisition Orders > Budgets

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Transactions sorted by Order Date and Budget	This report shows the number of events made on items purchased by a specific budget. The report is sorted by Order Number and Title. A dynamic filter on Item Status exists on the report itself.	How many events were made on items purchased by a specific budget?	Order Date Range, Budget Type, and later Budget Number	Order Number, Title, Barcode, Item Status, Number of Events	Report Studio

Expenditure

Public Folders > Acquisition Orders > Expenditure

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Expenditure sorted by Sub Library and Budget Open date	This is a report showing local expenditure sum sorted by Sub-Library.	What were the global expenses in local sum per each Sub-Library?	Budget Open Date, Transaction Type: Invoice	Sub-Library, Local Sum	Query Studio

Expenditure Report sorted by Order date, Sub library and Item Material Type	This is an expenditure report sorted by Sub-Library (and Ordering Unit) and Item Material Type with sub-reports sorted by Item Material Type (showing Order Number, local and actual local prices).	How much was spent per Item Material Type and Sub-Library? By which order?	Order Date, Item Material Type, Sub-Library, Ordering Unit	Sub-Library, Item Material Type, Local Price, Actual Local Price	Report Studio
Expenditure Report sorted by Order Date, sub library and Order Type	This is an expenditure report sorted by Sub-Library (and Ordering Unit) and Order Type with Sub-Report sorted by Order Type (showing order Number, Local and Invoice Local Prices).	How much was spent per Order Type and Sub-Library? By which order?	Order Date, Order Type, Sub-Library, Ordering Unit	Sub-Library, Order Type, Local Price, Invoice Local Price	Report Studio

Miscellaneous

Public Folders > Acquisition Orders > Miscellaneous

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
General Acquisitions sorted by Sub Library	This report presents Acquisition information. It is sorted by Sub-Library and Title.	Which titles were bought for each Sub-Library? Which acquisition method was used?	Sub-Library, Acquisition Method	Sub-Library, Title, Order Number, Budget Number, Order Status, Acquisitions Method, Arrival Status	Query Studio

General Acquisitions Statistics sorted by Sub Library	This report presents statistics and detailed order information per Sub-Library, Order Type, Status, and Acquisition Method.	How many orders were made per each Sub-Library, Order type, and Status?	Sub-Library	Sub-Library, Order Type, Order Status, Acquisition Method, Number of Orders, Percent of Total Number of Orders	Query Studio
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Orders

Public Folders > Acquisition Orders > Orders

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Canceled Orders sorted by Order Status Date and Sub Library	This is a report of orders that have been cancelled. It is sorted by Sub-Library (Ordering Unit) and Order Status.	How many orders were cancelled per each Sub-Library? Was it the library who canceled the orders or was it the vendor?	Order Status Date, Sub-Library, Ordering Unit	Sub-Library, Order Status, Date, Vendor Name, Number of Orders	Report Studio
Closed Orders sorted by Order Status Date and Sub-Library	List of closed orders sorted by Sub-Library (Ordering Unit) and Vendor.	How many orders are closed per each Sub-Library?	Order Status Date, Sub-Library, Ordering Unit	Sub-Library, Vendor Name, Order Number, Title	Report Studio
General Orders sorted by Sub-Library	Report on orders sorted by Sub-Library and Vendor. It also contains Budget Number.	What titles were ordered? By which vendors? On which budgets?	Sub-Library, Acquisition Method	Sub-Library, Vendor Name, Budget Number, Order Number, Title	Query Studio

Monthly Order Statistics sorted by Order Date Budget and Sub-Library	This is a payments report per Budget sorted by Sub-Library (Ordering Unit) and Order Year and Month.	How much was spent per month/year per each Sub-Library?	Order Date, Sub-Library, Budget Number, Ordering Unit	Sub-Library, Order Year and Month, Budget Number, Number of Orders, Total Local Sum	Report Studio
Order Numbers sorted by Vendor Name	Report on Order Numbers sorted by Vendor Name.	Which Orders were made per each vendor?	No filters	Vendor Name, Order Number, Title	Query Studio
Orders sorted by Budgets	This is an order report sorted by Budget Number.	Which Orders were purchased by which budget?	No filters	Budget Number, Order Number, Title	Query Studio
Orders sorted by Order Date, Sub-library and Order Status	This is an order report sorted by (Ordering unit), Sub-Library, Order Status, Vendor Name, Budget Number, and Order Year and Month. It contains order information and title.	How much was spent?	Order Date, Sub-Library, Order Status, Budget Number, Ordering Unit	Sub-Library, Order status, Vendor Name, Budget Number, Order Year and Month, Order Number, Title, Local Sum, VAT Sum, Total Sum	Report Studio
Orders Sorted by Sub-Library and Order Status	Report on Order Information (Order No., Order Year, Order Material type, Local Price) sorted by Order Status and grouped by Vendor, Sub-Library (Ordering Unit), and Order Material Type.	How much do orders in a certain status cost?	Order Date, Sub-Library, Order Status, Ordering Unit	Order Status, Vendor Name, Sub-Library, Order Material Type, Order Year and Month, Local Price	Report Studio

Orders for Serials Purchased	Serial Order Report with Order No., Title, Publisher, ISBN and Original Sum sorted by Vendor Name.	Which serial orders were purchased by each vendor?	No filters	Vendor Name, Order Number, Title, Publisher, ISBN, Original Sum	Query Studio
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Vendors & Claims

Public Folders > Acquisition Orders > Vendors & Claims

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Number of Claims per Vendor	This is a report on Claims per Order which belong to a Vendor sorted by Sub-Library (and Ordering Unit) with a pie chart of claims per vendor per each Sub-Library.	How many claims were made?	Order Date, Sub-Library, Ordering Unit	Sub-Library, Vendor Name, Number of Orders, Number of Claims	Report Studio
Vendor Cancelled Orders Sorted by Sub-Library	This is a report on orders canceled by Vendors. It includes Vendor Name, Sub-Library (Ordering Unit), Order No., and Item Title.	Which orders were canceled? Which vendors canceled which orders?	Order Date, Sub-Library, Ordering Unit	Vendor, Sub-Library, Order Number, Title	Report Studio

Vendor Performance Report	<p>Report with charts on vendors with Highest No. of Orders, Vendors with Greatest Variance Between Listed and Actual Price, Vendors with Highest Number of Claims, Vendors with Highest Number of Cancellations, and Vendors with Highest Number of Items Not Supplied. The table elaborates the information relevant to the described charts. There is a dynamic filter of Minimum/Maximum Number of Orders'.</p>	<p>Which are the most problematic vendors? With which vendors should the library continue to work?</p>	<p>Order Date, Sub-Library</p>	<p>Vendor Name, Number of Orders, Number of Claims, Average Number of Claims per Order, Number of Cancellations sorted by Vendor, Max Delivery Time, Number of Units Not Supplied, Listed Price, Actual Price, Price Variance per Order, Total Price Variance</p>	<p>Report Studio</p>
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Course Reading

Public Folders > Course Reading

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Report of Number of Items, sorted by Instructor	This report presents information from course reading including Instructor Name, Course Name, Doc Number, Title, and Barcode, sorted by Instructor.	What titles in my collection belong to course reading?	No filters	Instructor Name, Course Name, Document Number, Title, Barcode	Report Studio

Acquisition Budgets

Budgets

Public Folders > Acquisition Budgets > Budgets

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Budgets Transactions Report	This is a budget transaction report sorted by Budget Number and Transaction Type with Sub-Reports sorted by Transaction Type (including Budget No., Transaction Type, Order No., Local Sum, VAT Sum, Total Local Sum, and information on whether it was paid).	Which transactions were made on a budget? What was the expense?	Budget Number, Transaction Type	Budget Number, Transaction Type, Local Sum, VAT Sum, Total Local Sum	Report Studio

Number of Orders per Budget	This report generates number of orders per budget sorted by Budget Activity Status.	How many orders were fulfilled by each budget	Order Date Range, Budget Number Dynamic Filter: Budget Status	Budget Status, Budget Number, Number of Orders	Report Studio
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Expenditure

Public Folders > Acquisition Budgets > Expenditure

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Expenditure sorted by Budget	This is an expenditure report sorted by Budget Number with Sub-Report sorted by Vendors.	How much was paid for vendors? By which budget?	Budget Number	Budget Number, Vendor Name, Invoice	Report Studio
Expenditure sorted by Vendor	This is an expenditure report using Vendor, Budget and Invoice Information sorted by Vendor with Sub-Reports sorted by Budget.	Which vendor was paid by which budget?	Budget Open Date	Vendor Name, Budget Number, Invoice	Report Studio
Expenditure Statistics sorted by Budget	This is an expenditure statistics report sorted by year and open month presenting budget with expenditure details (sum and percentage).	How much was spent this year? On which budgets?	Budget Number	Year, Budget Open Month, Budget Number, Expenditure, Percentage of Local Sum	Report Studio

Inventory

Circulation

Public Folders > Inventory > Circulation

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Circulation Activity On Items That Cost More Than... sorted by Event Date, Minimum Cost and Sub Library	This is a circulation activity report containing information on Sub-Library, Collection Desc, Event Category, and Number of Events sorted by Item Price.	How many circulation events were made on items that cost more than a certain price? Was the purchase worthwhile?	Event Date, Minimum Cost, Sub-Library	Sub-Library, Collection, Event Description, Number of Events	Report Studio
Items Circulated sorted by Publication Year	This report shows a list of titles sorted by ascending year that were circulated in a defined date range.	Are the circulation transactions in the library made on up to date material?	Event Date Selection, Sub-Library, Event Type, Call Number	Bibliographic Publication Date (year), Title, Barcode, Call Number, Number of Events	Report Studio
Items Without Circulation Events	The report shows circulation activities sorted by Sub-Library and Collection. The report also includes items without events. Dynamic filter of Number of Events exists.	Which are the items that were less circulated? Which items were not circulated at all?	Event Date, Event Type, Item Status, Material Type, Sub-Library, Call number	Sub-Library, Collection, Title and Call Number. The report is sorted by Sub-Library, Collection, Title	Report Studio

Items without Circulation Events for Call Numbers Range	The report shows circulation activities sorted by Sub-Library, Call Numbers and Collection. The report also includes items without events. Dynamic filter of Number of Events exists.	Which are the items that were less circulated? Which items were not circulated at all?	Event Date, Event Type, Item Status, Material Type, Sub-Library, Call number	Sub-Library, Collection, Title and Call Number. The report is sorted by Sub-Library, Collection, Title	Report Studio
Ratio between Circulation Events and Corresponding Items	This is a Circulation Report sorted by Sub-Library, Collection and Title. It shows the Ratio of Circulation Transactions and Number of Items.	Which items need weeding? Which items are in high demand?	Event Date, Event Type, Item Status, Material Type, Sub-Library, Call number, Ratio	Sub-Library, Collection, Title, Number of Items, Number of Events, Ratio of Circulation Transactions/ Number of Items	Report Studio
Threshold of Item Circulation Usage Between Dates	This is a report that shows the threshold of Item Circulation Usage between dates set in the filter. It is sorted by Sub-Library and Collection, includes Item Title and Barcode.		Event Date	Sub-Library, Collection, Title, Barcode, Number of Events, Last Loan Date	Report Studio

Collection Management

Public Folders > Inventory > Collection Management

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Items Added to Stock sorted by Material Type and Call No. Selection	This is a report on items added to stock sorted by Material Type sorted by Item Material Type and Sub-Library. It includes Collection Number of Events and Item Price.	How many items are there per each Material Type? How much do they cost?	Arrival Date, Sub-Library, Call number	Material Type, Sub-Library, Collection, Number of Items, total Cost	Report Studio
Items Added to Stock sorted by Library	This is a report on items added to stock sorted by library and by Sub-Library and Item Material Type with Percentage sorted by Material Type and Sub-Library.	How many items were added to My Collection?	No filters	Sub-Library, Item Material Type, Number of Items, Percent of Total Number of Items.	Query Studio
Items Details per Title sorted by Call Number	The report presents the Number of Items and Item Information for each title.	How many Items per Title exist in the collection? What is their information?	Call Number, Sub-Library	Title, Sub-Library, Collection, Item Status, Primary Call No, Barcode	Report Studio

Items Held, Added, Withdrawn	This is a report on Items Held, Added, and Withdrawn by Sub-Library and Collection with Sub-Reports. It includes information on Items Added, Withdrawn, Held in a Certain Period, and Held Today.	What are the changes in the collection inventory?	Item Open Date, Process Status, Material Type, Sub-Library, Collection, Item Material Type, Acquisition Method, Call Number	Sub-Library, Collection, Process Status, Acquisition Method, Material Type, Items Held at Beginning of Period, Withdrawn, Net Number of Items Added, Items Held at End of Period, Items Held Today	Report Studio
Items Not Issued in Defined Date Range	This is an items report of items not loaned in defined date range. The report is sorted by call number and title. It includes Barcode, Item Status and Last Loan Date.	Are newly purchased items being used? Which items are not being used?	Loan Dates, Item Open Date/Arrival Date, Item Status, Sub-Library, Call Number	Sub-Library section under it, the following columns exist: Call Number, Title, Barcode, Item Status, Last Loan Date, Arrival Year and Month	Report Studio
Items with Call Number Selection	This is a detailed report on items containing Collection Name, Item Status, Process Status, Title, Barcode, and Primary Call Number Description sorted Sub-Library and is sorted by Call Number.	What is the item's information of my collection?	Call number, Sub-Library	Sub-Library, Collection, Primary Call No, Title, Item Status, Process Status, Material Type, Barcode	Report Studio

Monographs and Series Purchased	This is an Items Report of monographs and serials purchased between defined order dates. The report is sorted by Sub-Library, Acquisition Method, Order Type, and Item Material Type. It includes Item Title, Order Number, Item Average Price, and Number of Items.	How many items exist in the collection per each Sub-Library and Acquisition Method?	Order Date, Acquisition Method, Sub-Library, Item Material Type	Sub-Library, Acquisition Method, Order Type, Item Material Type, Title, Order Number, Item Average Price, Number of Items	Report Studio
New Accessions List	This report contains a list of titles sorted by Sub-Library and Collection.	What are the new books in the collection?	Bibliographic Open Date, Sub-Library, Item Material Type, Call Number	Sub-Library, Collection, Title	Report Studio
Number of items sorted by Item Status Sub Library and Collection	This is a report on Number of Items sorted by Sub-Library and Collection with Item Percentage per Collection. This report contains a pie chart.	How many Item Statuses per Item Status are there in the collection?	No filters	Sub-Library, Collection, Item Status, Number of Items, Percent from Total Number of Items	Report Studio
Number of Items sorted by Material Type	This is a report on items sorted by Item Material Type with No. of Items and No. of Titles. This report contains a pie chart.	How many items are in the collection per item each material type?	Open Date/Arrival Date, Sub-Library, Call Number	Item Material Type, Number of Titles, Number of Items	Report Studio

Number of Items sorted by Process Status per Library	This is report on Number of Items sorted by Process Status sorted by Sub-Library with Sub-Report sorted by Process Status containing bibliographic information.	How many items are in the collection per each Process Status?	Item Open Date, Sub-Library, Process Status	Sub-Library, Process Status, Number of Items, Percent per Sub-Library	Report Studio
Number of Owned Materials	This is a report sorted by Item Process Status with No. of Items and No. of Titles. This report contains a pie chart.	How many items are in the collection per item each Item Process Status?	Open Date/Arrival Date, Process Status, Call Number	Process Status, Number of Titles, Number of Items	Report Studio

ILL

Public Folders > Inventory > ILL

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
List of Items Provided to Other Libraries	This report contains a list of items provided to other libraries sorted by ILL partner name. There is a Sub Report which includes bibliographic and item information.	What titles are requested the most by other libraries?	ILL Partner ID, Material Type, Title	Partner Name, Title, Publisher, Author, Language, Number of Items	Report Studio

List of Items Received From Other Libraries	List of Items Received from Other Libraries	This report contains a list of items received from other libraries sorted by Supplier Name. There is a Sub Report which includes bibliographic and item information.	What titles are requested the most from other libraries? Should we buy the most requested titles?	ILL Supplier, Material Type, Title	Supplier Name, Title, Publisher, Author, Language, Number of Items
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Serials

Public Folders > Inventory > Serials

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Claims (Issues) per Vendor	This is a Statistical Claims Report sorted by Sub-Library and Vendor Name.	How many claims were made per each Sub-Library?	Claim Date	Sub-Library, Vendor Name, Title, Number of Claims	Query Studio
Current Serials sorted by Acquisition Method	This is a Statistical Report on the currently available serials sorted by Sub-Library and Acquisition Method.	Which serials exist in my collection?	Sub-Library, Acquisition Method	Sub-Library, Acquisition Method, Title, Order Number, Number of Items	Report Studio
Serial Titles sorted by Acquisition Method	This is a detailed serials report sorted by Sub-Library and Collection.	What is the purchase and bibliographic information per serials purchased between given dates?	Arrival Date, Acquisition Method, Sub-Library	Sub-Library, Collection, Title, Publisher, Acquisition Method, Order Number, Number of Items	Report Studio

Circulation Logger

Public Folders > Circulation Logger

Name	Description	Business Question	Filters	Parameters	Report Generation Tool
Activities by Action ID	This is a Statistical Circulation Logger Report sorted Item Status and action.	How many Circulation Logger transactions were registered between given dates per each activity type?	Transaction Date	Action ID and Description, Item Status ID, and Description, Year and Month, No. of Transactions	Query Studio
Activities by Cataloger	This is a Circulation Logger report sorted by Cataloger Name and Year and Month	How many Circulation Logger transactions were made by each cataloger?	Transaction Date	Cataloger Name, Cataloger IP, Year and Month, No. of Transactions	Query Studio
Activities by Month and Material Type	This is a Circulation Logger report sorted by Material Type Year and Month	How many transactions were registered in the Circulation Logger per Material Type?	Transaction Date	Material Type Description, Year and Month, Action ID, Action Description, No. of Transactions	Query Studio
Activities by Patron Profile	This is a Circulation Logger report sorted by Patron Profile Year and Month	How many Circulation Logger transactions were registered per each Patron Profile?	Transaction Date	Patron Profile ID, Action Description, Year and Month, No. of Transactions	Query Studio
Activities by Sublibrary and Collection	This is a Circulation Logger report sorted by Sub-Library and Collection.	How many Circulation Logger transactions were registered per each Sub-Library and Collection?	Transaction Date	Sub Library, Collection, Action ID, Action Description, Year and Month, No. of Transactions	Query Studio

Summary of Transactions by Sublibrary Filter	This is a Circulation Logger report grouped by Sub Library. This report contains a chart for each Sub-Library	How many transactions were registered in the Circulation Logger per each Sub-Library?	Transaction Date, Sub-Library	Sub Library, Action Description, No. of Transactions	Query Studio
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List of Important Terms

Cognos ReportNet online books, accessed via online Help, contain a complete list of important terms. The following terms are relevant for ARC.

attribute

Additional information included with a dimension.

data warehouse

Also known as: Data warehouse or Information Warehouse. This is a database where data is collected for the purpose of being analyzed. A data warehouse collects, organizes, and makes data available for the purpose of analysis to give staff the ability to access and analyze information about library activities.

dimension

A perspective for analyzing the data, for example, Patron.

dimension table

Dimension tables contain the dimensions by which the measures can be sliced and analyzed. In a case of a hierarchy dimension (for example: Year – Quarter – Month – Date), all the hierarchy values are stored in a single dimension table, even if values came from several source tables and data collection results in multiple records in the dimension table. Any code that appears in the fact table also appears in the dimension table.

In an entity relationship diagram, the dimension table is the table that contains the data for a dimension. The dimension table has a primary key that is used to connect it to the fact table. The dimension table has as many attribute fields as possible. These fields describe individual characteristics of the dimension.

The dimension tables in an entity relationship diagram are intentionally de-normalized. The level fields and the attribute fields contain data that is duplicated in many of the records. This normally does not add significantly to the amount of storage space needed in the database, because the overall size of each dimension table is very small when compared to the size of the fact table.

drill down

A method of exploring detailed data used in child categories. The availability of drill down depends on the granularity of the data in the data warehouse.

drill through

A method of exploring detailed data used in other related reports. This lets you view the underlying transactional detail. The availability of drill through depends on the structure of the data in the data warehouse.

Entity Relationship Diagram

The representation of the logical organization of data in a database. It consists of at least one fact table and one or more dimension tables.

Each of the dimension tables has a single field primary key that has a one-to-many relationship with a foreign key in the fact table. The entity relationship diagram is an intentional simplification of the database design that would be achieved by following the standard rules of normalization.

ETL (Extract, Transform, and Load)

ETL refers to the process of getting data out of one data store (Extract), modifying it (Transform), and inserting it into a different data store (Load).

fact table

Fact tables are the main tables of modules. They contain the actual measures/occurrences performed (for example, quantities, rates, and values) and codes, which connect the fact tables to the dimension tables. In addition, the fact tables often contain different calculated fields (for example, delta values).

granularity

The level of detail of the facts stored in a data warehouse.

normalization

The process of organizing data in accordance with the rules of a relational database. In a completely de-normalized database, the patron's name and address information is stored every time a patron borrowed an item.

In a normalized database each patron's name and address is stored only once, in a separate table. Every loan record has a reference to the patron table to indicate which patron is involved.

package

A container for models, reports, and so on. Modelers create packages in Cognos Framework Manager to publish models to the ARC server. In the entity-relationship diagrams included in this guide, packages can be identified by the label FACT_<package name>, for example, FACT_ORDER.

Referential integrity

A feature provided by relational database management systems (RDBMSs) that prevents users or applications from entering inconsistent data. Most RDBMSs have various referential integrity rules that you can apply when you create a relationship between two tables.

For example, suppose Table B has a foreign key that points to a field in Table A. Referential integrity would prevent you from adding a record to Table B that cannot be linked to Table A. In addition, the referential integrity rules might also specify that whenever you delete a record from Table A, any records in Table B that are linked to the deleted record are also deleted. This is called cascading delete. Finally, the referential integrity rules could specify that whenever you modify the value of a linked field in Table A, all records in Table B that are linked to it are also modified accordingly. This is called a cascading update.
