CARL Conversations: May 27, 2021

Topic: Excel Basics and CARLX Reports

<u>Question and Answer Session</u>

1. Can you only Filter within the Home Ribbon, or is there somewhere else you can do this?

   Yes, you can use the Data Ribbon to Filter as well. The Data Ribbon will have a few more accessible options, too. It's a matter of preference as to how you'd like to filter your documents.

2. How is the Unfilled Holds report in CARL useful? Is it similar to the View Holds function in Sierra?

   Yes, this is a way for libraries to see a list of holds to be picked up at their branch that have not been filled yet. It is Report 46 – Unfilled Holds in CARLX and staff only need to enter in a date and select their branch to run it. The report itself won't show if the hold will never be filled due to items no longer being attached. Staff would need to grab the BID from the report and search for it in CARLX to see if there are no longer items attached. This could also be used for collection development.

3. Why do I seem to have issues with loading the Unfilled Holds report on the staff computers? Why can some days we can open a report and other days we can't?

   It could be there are reports already open that are stopping the new report from opening. It could also be the bit version you have of Office. If you are seeing the "[Microsoft][ODBC Driver Manager]" error message you need to contact OWLSnet Help and Julie should be able to assist you with this. You can also try going out of the CARL report you just ran, go into another report, close and then going back into the one you want to run. Also, if a report doesn't open for you that normally would, you can try going through the C: drive to open it instead. If none of this helps, please take screen shots and send to OWLSnetHelp along with the steps you took that prompted the error.

4. What other reports are there in CARLX that staff should be doing in addition to the ones sent out by OWLS?

   Staff can look at running the following reports as frequently as they'd like to help clear up some data, keep patron and item records clean, and just keep items moving:

   Patron List - Report 1: Can be used for many purposes one being to pull up online registrations to see which ones are older than 30 days or have holds on them.

   Items by Status – Report 17: Good for weeding lists and collection development, etc...

Lost Items – Report 20: shows what has been Lost and Paid or Lost and Missing for a given date range. Great for running to check on if an item is brought back after being paid for or for staff to search the library for Lost and Missing items.

Holds Purchase – Report 26 and 27: These reports are great for seeing what items at your branch and system wide have holds on them. This is great for collection development to see the ratios of holds to items.

Unfilled Holds – Report 46: Shows holds with your branch as the pickup location that haven't been filled yet. Could be used for collection development.

Claims Returned/ Claims Never Had– Report 60 and 62: Items that have been set to Claims Returned or Claims Never Had. These reports should only be run ONCE a day so not to disrupt the backend process. This report, however, is not comprehensive and only shows what has currently been Claimed. If you don't see your branch as an option, please let OWLSnetHelp know.

Holds Expired/Cancelled Holds – Report 80 and 81: Report 80 shows holds that patrons never came to pick up off the hold shelf. Report 81 shows holds that have expired, were cancelled by staff, and/or cancelled by the patron.

In Transit – Report 11001: Shows items that have a status of In Transit. When running this report, use the number of days as 14 to mirror how it was run in Sierra. Also, when running this report please don't choose BOTH as an option. Until the summer release, staff will need to choose 'In Transit To' **OR '**In Transit From' so that the number of days sticks.

5. What is the "back way" of getting to the reports we run through CARLX?

   When reports in CARLX don't load after clicking the "View" icon, staff can try going through the C drive to open them. This will happen for a handful of the reports since it seems half of the CARL reports are crystal reports and half are Excel. Our system seems to have issues with the crystal reports. When this happens staff can navigate this path: C: > Program Files > CarlX > Live > DSS > Data > "RptXXXX". Staff can also create a shortcut to this folder on their desktop. To do this, once in the "DSS" folder, right click on the "Data" folder and either click on "Create Shortcut" and then drag your shortcut to the desktop, OR, you can right click on click on "Desktop (create shortcut)." That way, staff won't need to go through the C: drive to access this folder anymore.

6. If I want to see who our online registration cards are, would I need to use the original data from the report? (Accessing from the C: drive)

   Yes. This report (Report 1 – Patron List) doesn't open when clicking on "View", it is a crystal report, so staff will need to use the C: drive to open it. Once open, staff can filter the Patron Type column and select only Online Registration to see those accounts. Staff can also use Report 33 – Patron Count by Branch and make sure to select Online Registration in the parameters. However, this report will only give you a count and not each individual account. If more information is what you're looking for then I suggest using the Patron List report.

7. Do the reports overwrite themselves if you don't rename them?

   The reports will rename themselves with the date/time it was run if there are multiple files in there for the same report. Example: "Rpt0009" and "Rpt0009_2021_05_27_10_30". It is always best practice to rename your reports the first time you open them using "Save As" instead of just "Save." I suggest using the report name and the current date. But whatever is most helpful to you works. And if staff would like to go through and remove old reports they no longer need, they can do so. **DO NOT** remove or rename files from the "Reports" folder. These are the actual templates Excel is using when opening up the reports.

8. Could a more in-depth webinar be done on Pivot Tables?

   We can investigate doing a more specific CARL Conversation on Pivot Tables or a Webinar. All the information Molly gained on Pivot Tables was from Gale courses and watching YouTube videos. But we can certainly consider it since pivot tables are a very helpful tool to have under your belt in Excel.