

CARL-X Reports

Circulation Reference Guide

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Introduction

CARL-X reports offer canned reports that staff can access for their designated data needs. This will cover the reports available through Circulation and hopefully give staff a better understanding of what each report does along with what the criteria for each is pulling. Included is also a few suggestions as to when you would want to use the designated report. There is one report, Claims Returned, that is technically a Utility and functions a little differently than the rest, which will be explained within the report summary.

There are two different ways a report will open when the “View” button is clicked: Crystal Report and a formatted Excel file. A crystal report is similar to a PDF in which it cannot be edited. A formatted Excel file can be filtered and/or sorted as needed. PLEASE Save As before you make any changes to a report.

If you are needing to format the data your own way OR a report doesn’t open when you click “View,” then you can open Excel and open the file by navigating through the C drive. The path is: C > Program Files > CarlX > Live > DSS > Data. If you don’t see any files, then in the bottom right corner of the window, choose “All Files” from the drop-down. Your reports should appear. Doing it this way will give you all the data the report ran with no formatting.

Report 1 – Patron List

Default Template: Crystal Report

Uses: Patrons registered with address (use date range for registration); anytime you need a list of patrons start here.

This report displays information about patrons based on their patron type and their status. There are options to limit the list of patrons returned by patron type and patron status in combination with branch and branch type (default branch, registration branch, last activity branch, last self-service activity branch, or last edited branch) as well as date range for patron registration, expiration, last activity, last self-service activity, or last account edit. The report groups patrons by their status and lists them alphabetically by patron name for the selected branches in the selected date range. Included in the output is the patron name, patron status, patron ID, and patron type. A count of patrons for each status is included as well as a grand total at the end of the report.

Report 3 – Problem Patron List

Default Template: Excel

Uses: Patrons who owe money; waiving fines; who owes on Lost items

Tips: OWLS suggests putting the money owed to “\$0.01” and overdues to 0 for generic lists. More specific lists, enter in the amount and overdues as you’d like. Overdues is looking at current overdues.

This report displays patrons where their accounts meet defined parameters for fine and/or overdue activity. First, the patrons listed can be limited by their default branch and patron type. Then, the output can be further narrowed by limiting the outstanding transactions to be considered by a date range. Users can enter in a dollar amount, where patrons who owe equal to or more than will be listed. The options selected in the Transaction Type parameter – Fines, Lost, and Overdue – are used to calculate the dollar amount. Also, users can enter in a number of overdues, where patrons who have equal to or more than the number entered will be listed. The template has two tabs, the first tab consists of patron information with the total amount owed and includes the five oldest patron notes. The second tab

shows the individual items including the patron name and id, the call number, title, and item number, as well as transaction type and amount.

Report 8 – Registration by Branch

Default Template: Crystal Report

Tips: This is only a total number per patron type. This does not give specific patron information.

This report displays the number of active and expired patrons by their default branch and patron type. The count can be limited by the default branch, patron type and a date range, which is based on the patron's registration date. Information is grouped by branch and then patron type. For each patron type, a count of active patrons and expired patrons will display, with row and column totals for each. A grand total of active, expired and total patrons is at the end of the report.

Report 9 – New Patrons Registration

Default Template: Excel

Tips: This is only a total number of patrons by date and then patron type. If you are only looking for brand NEW registrations, you will need to filter out "Patron ID change" and "Patron Re-registration" from the transaction type column.

This report displays patron registration activity counts based on the date and branch where the registration activity occurred. Counts are grouped by date, branch, patron type and the type of registration activity. Registration activities include new patron registration, patron ID change, and a patron re-registration (i.e. patron expiration date is changed).

Report 13 – Circulation by Patron Type

Default Template: Crystal Report

Uses: You could use this to see how many circs you have on certain days by patron type. Ex: Maybe you have story time Mondays and you want to see if circs for Juvenile cards is higher on Mondays.

This report displays circulation counts grouped by the transaction branch and patron type from the selected date range. Circulation counts included are Charge, Renew, Discharge (Return), and On Shelf Return. Subtotals are displayed for each patron type and branch, and a grand total for all is displayed at the end of the report.

Report 14 – Circulation by Branch

Default Template: Crystal Report

Uses: You could use this to determine weekly and monthly circs. Ex: You could use this to see if a certain event held at your branch increased circulations during that time.

This report displays circulation counts grouped by the transaction branch from the selected date range. Circulation counts included are Charge, Renew, Discharge (Return), and On Shelf Return. Subtotals are displayed for branch, and a grand total for all is displayed at the end of the report.

Report 15 – Circulation by Location

Default Template: Crystal Report

Uses: For looking at circ counts in a given time frame for a specific collection, based on the Location code.

This report displays circulation counts grouped by the transaction branch and location code from the selected date range. Circulation counts included are Charge, Renew, Discharge (Return), and On Shelf Return. Subtotals are displayed for each location code and branch, and a grand total for all is displayed at the end of the report.

Report 16 – Circulation by Media

Default Template: Crystal Report

Uses: For looking at circ counts in a given time frame for a specific format, based on the Media code.

This report displays circulation counts grouped by the transaction branch and media code from the selected date range. Circulation counts included are Charge, Renew, Discharge (Return), and On Shelf Return. Subtotals are displayed for each media code and branch, and a grand total for all is displayed at the end of the report.

Report 17 – Items by Status

Default Template: Crystal Report

Uses: Weeding reports, Missing items, Lost items, items with the wrong media code, etc. Anything that would require you to pull a list of all items of a certain collection or status, you can use this. I suggest opening this file through the C drive to be able to filter and narrow down your results to exactly what you need.

Tips: If you select all statuses, this will include statuses Hold Shelf and Hold Shelf Temporary, you will see items from other libraries on your list. This is showing items by statuses by branch and items on your holdshelf are seen as 'at your branch.'

This report displays a list of item records and details about those items. The items displayed can be limited by the item's status, branch, location, and media code, as well as the item status date. Items with a status date including the date selected and earlier will be displayed. The report output includes a summary view, where basic information about the item such as prefix, item call number, CARL BID, item ID, title, last circulation date, and status are displayed. The detailed view includes the summary information plus author, branch, location, media, last circulation date, circulation history, cumulative circulation, last circulation date, creation date, ISBN, publication date, and price.

Report 19 – Heavily Circulating Titles

Default Template: Crystal Report

Uses: Creating promotional documents for the library; statistical documents for library boards; collection management, etc.

This report displays information on heavily circulating titles based on circulation statistics stored in the item record for the current year. The titles returned can be limited by the combined number of item circulations and any titles where there are more than the entered value. Information about the branch, location, call number, title, author and CARL BID is displayed. Also for each title, there is information

about total circulation of the items associated with that CARL BID, as well as, the number of items. A Circs/Copy statistic is also calculated.

Report 20 – Lost Items Report

Default Template: Crystal Report

Tips: I would also run Items by Status and choose the “Lost” status to compare reports to make sure you’re not missing anything.

This report lists items whose status became Lost within a specific date range. The display of Lost items can be further limited by the item’s branch and the type of lost transaction, i.e. A9/LOSTNPAID, A9/LOSTNMISS, and other, not LOSTNPAID or LOSTNMISS. The report provides a summary view of items grouped by branch, including information such as the location, prefix, item call number, author, title, and item ID. The report also includes a detailed view for each item, where additional information such as media, CARL BID, ISBN, publication date, price, circulation history, last circulation date, and the associated patron ID are shown

Report 26 – High Demand Holds

Default Template: Excel

Uses: Collection development.

Tips: There is a video on the OWLS Circulation website showing how to run this report.

This report displays information for qualifying titles when compared to a specified target ratio of the number of title and/or issue holds to the number of copies (i.e. items) for the whole system, as well as for branch groups, if defined. Libraries may use this report to review those titles where more copies may need to be ordered to meet patron demand. The report output is limited by defining a target ratio of title holds to the number of copies, e.g. 3:1. There is the option to exclude or include Missing or Lost items in the calculation of the target ratio. The report output displays the date the report was run, the target ratio, CARL BID, the title’s ratio, title, author, call number, ISBN, publication date and format. There is also a value showing the number of Acquisitions Dummy Items that are associated with the CARL BID, allowing libraries to discriminate between existing and on order items for that title’s ratio.

Using a 3:1 target ratio as an example, a title will be displayed if:

- Its ratio equals the target ratio, e.g. 3:1
- Its ratio is greater than the target ratio, even in simplified form, e.g. 8:2 simplifies to 4:1. The report will display the non-simplified form so libraries can view actual title holds to copies.
- The number of holds matches that defined in the ratio, but the number of copies is zero, e.g. 3:0.

Note: This report also reacts to Branch Grouping features. If Branch Grouping is enabled for Reports, a title’s ratio will qualify for display when compared to the target ratio as calculated for that branch group. If there is an outstanding title hold for pickup at a branch within that branch group, it will be included in that branch group’s count for the number of title holds. This value will then be paired with the number of copies, which is based on the number of items whose current branch is within that branch group.

After all the titles have been displayed for each branch group, a list of the system-wide, or institutional, ratios and qualifying titles will display.

Report 27 – High Demand Holds by Branch

Default Template: Excel

Uses: Collection development.

Tips: There is a video on the OWLS Circulation website showing how to run this report.

This report displays information for qualifying titles when compared to a specified target ratio of the number of title and/or issue holds to the number of copies (i.e. items) for a specific branch or set of branches. Libraries may use this report to review those titles where additional copies may need to be ordered to meet patron demand. The report output is limited by defining a target ratio of title holds to the number of copies, (e.g. 3:1), and to select the branch(es), which refers to the pickup branch(es) for the outstanding holds. The number of outstanding holds for pickup at the selected branch is then compared to how many items this particular branch owns. There is also the option to exclude or include Missing or Lost items in the calculation of the target ratio. The report output displays the date the report was run, the target ratio, CARL BID, the title's branch ratio, title, author, call number, ISBN, publication date, and format.

Report 28 – High Demand Holds by Location Code

Default Template: Excel

Uses: Collection development.

This report displays information for qualifying titles when compared to a specified target ratio of the number of title and/or issue holds to the number of copies (i.e. items) for a specific location code. Libraries may use this report to review those titles where additional copies may need to be ordered to meet patron demand. The report output is limited by defining a target ratio of holds to the number of copies (e.g. 3:1) and selecting the location code with which to limit qualifying items. The number of outstanding holds is then compared to how many items have the selected location code, and whether this value qualifies to be output based on the defined target ratio (e.g. meets or exceeds). There is also the option to either exclude or include Missing and Lost items in the calculation of the target ratio. The report output displays the date the report was run, the target ratio, CARL BID, title, author, call number, ISBN, format, location, publication date and the location ratio.

Note: To ensure meaningful data is reported, TLC has intentionally omitted titles from being reported where there are outstanding holds against a title whose items do not match the selected location code. These would always be reported out with a target ratio of n:0 and not necessarily apply to the report parameters selected. This report also only allows the selection of one location code per parameter set.

Report 30 – Circulation Statistics

Default Template: Excel

Uses: Gaining more insight into who (patron type) is checking out what (location/media) on any given day.

Tips: In order to read the data better, a pivot table will most likely be needed in Excel. Contact OWLSnetHelp if you'd like help on pivot tables.

This report displays counts of circulation activity for charge, renew, discharge (return), and on shelf returns limited by the branch where and the date when the transaction occurred. A count is displayed for each combination of date, branch, location, media, transaction type, and patron type.

Report 31 – Transaction Totals by Patron Stats

Default Template: Excel

Uses: Mainly seeing how many transactions patrons from a given municipality or other selected field (User Defined Field) had in a given timeframe. OWLS staff use this report for annual report data and the posted monthly reports.

This report displays circulation activity counts based on the selected patron statistic(s) (a.k.a. User Defined Field). The report output can be further limited by a date range, which applies to when the circulation transaction occurred, as well by the branch where the circulation transaction occurred. An Excel Pivot Table detailed view is available that displays a count for combination of the transaction type (e.g. Charge), the transaction branch, the patron statistic label, the patron statistic value. Additional information about the borrower use and card use are provided for each transaction combination. The borrower use count refers to the distinct number of patron IDs associated with that transaction combination and date range. For example, if there were five charge transactions, but they were completed by only two distinct patron IDs, then only a value of two would display for the borrower use count. The card use count refers to the cumulative number of days associated with that transaction combination and date range. For example, if a distinct patron ID charges five items on one day in the morning and then another five items later that same day, it will only count as one card use statistic for that day.

Report 32 – Patron Count by Patron Stats

Default Template: Excel

Uses: To see how many patrons there are for your branch for a given municipality or other selected field (User Defined Field).

Tips: In order to read the output better, staff may want to use a pivot table to compile the date into a report format. Please contact OWLSnetHelp if you would like more help with pivot tables in Excel.

This report displays a count of patrons grouped by the selected patron statistic(s) (a.k.a. User Defined Field) and available values for each patron statistic. The report output can be limited by an "as of" date, which refers to the date the patron registered his/her library card, and any dates earlier. Additional limiters are branch, which corresponds to the default branch in the patron account, and the patron statistic(s) you are interested in viewing counts for. The report will display counts based on the combination of branch, patron statistic label, and patron statistic value as of the selected date.

Report 33 – Patron Count by Branch/Patron Type

Default Template: Excel

This report displays a count of patrons grouped by the selected branch and patron type. The report output can be limited by an “as of” date, which refers to the date the patron registered his/her library card, and any dates earlier. Additional limiters are branch, which corresponds to the default branch in the patron account, as well as the patron type. The report will display counts based on the combination of branch and patron type as of the selected date.

Report 34 – Patron Count by User Defined Field

Default Template: Excel

This report displays a count of patrons grouped by the selected patron statistic(s) (a.k.a. User Defined Field) and available values for each patron statistic. The report output can be limited by a date range, which refers to the date the patron registered his/her library card. Additional limiters are branch, which corresponds to the default branch in the patron account, and the patron statistic(s) for which you are interested in viewing counts. The report will display counts based on the combination of branch, patron statistic label, and patron statistic values for patrons whose registration fell in between the selected dates. This report is similar to Report 32, but offers an additional date parameter so the library may see counts based on a date range, such as for fiscal year reporting, versus an “as of” date.

Report 42 – Daily Statistics

Default Template: Excel

This report displays counts of various transaction activities, such as holds filled, fine payments, and patron registration. The report output can be limited by the type of transaction, the branch where the transaction occurred and the date range in which the transaction occurred. Counts are determined by each combination of date, branch and transaction type

Report 46 – Unfilled Holds

Default Template: Excel

This report displays information on outstanding Title, Issue, and Item holds. These are holds yet to be filled for patrons. The report output is limited by a Transaction Date, where holds placed on or before that date will be displayed, and Branch, which corresponds to the transaction branch where the hold was placed. Information about the outstanding hold is displayed, such as the hold type, CARL BID, Item ID for Item holds, title, author, run date, hold placed date, call number, ISID, pickup branch. and the requesting Patron ID and name. An initial report summary is provided that shows the count of Title, Issue, and Item holds for each branch selected.

The .csv file has additional columns such as institution name, placed at branch, patron type, item price, and media.

Report 55 – Audit Trail

Default Template: Excel

Tips: It is advised to include the ONLINE branch in addition to your branch(es) when using this report in order to get online payments. If you’re only looking for in library payments, then you don’t need to include this, but it is recommended to do so to get a bigger picture of payments.

This report displays activity for paid, cancelled, waived, and/or refunded fines and fees. The report output can be limited by a date range for when the fine/fee activity occurred, by the transaction branch(es), and the specific type of fine/fee activity. Additional limiters may be entered such as the computer terminal name and the user alias who completed the fine/fee activity. An initial report summary is provided, which shows each branch selected a total for payment codes separated by the owning branches for the items. The second tab includes the individual transactions for each fine/fee activity detail, information such as the date, time, Patron ID, Item ID, amount paid, fine/fee type, fine/fee activity and any fine/fee notes are shown. The final tab is for totals by payment methods. I.e. Cash, Credit.

Report 60 – Claims Returned List

Default Template: Crystal Report

Alternate Template: Excel

Uses: As a “Search Shelves Before Billing – Claimed, Missing, and Lost” report to locate items before billing a patron.

This report displays information on those transactions for items that were identified as Claims Returned. The report output can be limited by the branch, which is associated with both Claims Returned branches and item branches. For example, if you select to limit the report by Branch A, then the report will display all items Claims Returned at Branch A as well as items that belong to Branch A that are associated with a Claims Returned transaction. The report output will include both the Claims Returned branch and the Item branch. If an item was identified as Claims Returned for multiple branches, it will display for each Claim Branch as selected. Information about the transaction and Claims Returned item is displayed, such as the item branch, location, media, and call number, and Claims Returned date, as well as the patron ID associated with the Claims Returned transaction. Each transaction will also include information about where the item is within the library’s configured Claims Intervals, for example C1 is a New Claims Returned. This is relative to when the report was last run and when the Claims Returned was placed.

IMPORTANT NOTE: This report is an exception to the general rule about Reports versus Utilities, where the latter update data. When run, this report updates a value that indicates how many times a Claims Returned transaction has appeared on this report. For example, if you place a Claims Returned on Monday and the next time you run the report is on Tuesday morning, this Claims Returned transaction will display as a New Claim. If you were to run the report again immediately after, this transaction would not display as it already displayed once on the report. It will not display again until it ages past the next defined Claims Interval.

Report 62 – Claims Never Had List

Default Template: Crystal Report

Uses: Could be used to help locate items that could have been misplaced in the library or Missing.

This report displays information on those transactions for items that were identified as Claims Never Had. The report output may be limited by a date range, which applies to when the Claims Never Had was placed, and the associated item branch. Information displayed includes: both the item branch and claim branch, item location and media, item ID, item call number, title, author, and the claim date.

Report 80 – Hold Expired List

Default Template: Crystal Report

Tips: This list shows ONLY those holds that were expired.

This report displays information on those holds that expired from the hold shelf, i.e., the patron did not come to retrieve their hold shelf item by the expiration date. The report may be limited by the hold pick-up branch. Expired hold information is relative to when library staff execute this report, and the output is likely to change over time as expired hold shelf items are processed by library staff. Information displayed in the report output includes the patron name, patron phone number, hold expiration date, item ID, title, author, item call number, and the item's owning branch and location. Expired holds are grouped by the hold pick-up branch.

Report 81 – Cancelled Holds

Default Template: Excel

Tips: This list shows ONLY those holds that were cancelled.

This report displays information on all hold cancellations, including those holds that expired, were canceled by library staff, and/or canceled by the patron. The report output may be limited by a date range, which applies to when the hold cancellation occurred, as well as the hold pick-up branch. Information displayed in the report includes the patron ID, CARL BID and Item ID as appropriate, title, user alias that canceled the hold, pick-up branch, cancel reason as appropriate, and the cancellation date.

Report 3200 – Most Borrowed Books

Default Template: Excel

Tips: This one includes magazines and can't be removed through search criteria. Numbers may be skewed because of this.

This report was created to assist with specific reporting needs for The Library Journal and displays information for titles that meet the specified criteria for top # of charges, top # of holds (refers to holds awaiting pick up by the customer), and top # of static holds (unfilled holds). The report output can be limited by selecting a date range for when transactions occurred, and which "top" criteria should be considered. At least one of the "top" criteria must be completed with a numeric value to ensure data is returned. Information displayed in the report output includes:

- Charges/Charges Rank – the count of checkouts for the date range chosen and title's place in ranking
- Holds/Holds Rank – the count of copies that are "on the holds shelf to be picked up" and title's place in Holds ranking for hold shelf holds.
- Static Holds/Static Holds Rank – the count of the "unfilled holds" for that title and the title's place in ranking for unfilled holds.

For example, if you were to run the report with a value of 100 for the parameter "Top # of Charges," it will report the top 100 titles that were charged during the period specified to meet this criterion. Information for the other rankings for Holds and Static Holds will also appear.

Report 11001 – In Transit too Long

Default Template: Excel

Uses: To see what items have been “stuck” for more than 14 days.

Tips: Please use several days of at least 14 for a proper Sierra “In Transit Too Long” report. But also feel free to check things in transit for less time than that. This is good to run to see what has been misplaced by either library staff or WALTCO.

This report displays information on items that are in an In Transit or Hold In Transit status for more than a specified amount of days. The report output can be limited by the branch where the item is “in transit to”, “in transit from” or both, and the minimum number of days an item has been in In Transit or Hold In Transit status. For example, inputting 30 days will identify items that have been in transit for 30 days or more. Information displayed includes the item id, item call number, title, author, date item was placed in transit, the owning branch, the in transit from branch, the in transit to branch, and patron name and patron ID of the outstanding hold as appropriate. Items are grouped by branch, in this case the “in transit from” branch.

Report 11002 – All Holds List

Default Template: Crystal Report

This report displays all outstanding title holds for the whole library system. This report does not require any parameters to be selected and the outstanding title holds information is relative to when library staff run the report. Information such as where (i.e. branch) the hold was placed, patron name, title, and hold placed date is displayed. Holds are grouped by the branch where the hold was placed.

Report 11003 – Daily Notice Count

Default Template: Excel

This report displays information on the counts of notices grouped by transaction branch, zip code, notice type (e.g. lost, first overdue, hold pickup, etc.), and delivery method (e.g. email, phone, paper). This report does not require any parameters to be selected and the notices information is relative to when library staff run the report. Information displayed includes the branch, zip code, notice type, count, and delivery method.

Report 11004 – Notice Count by Patron

Default Template: Excel

This report displays information on the type and counts of notices sent to a particular patron. This report does not require any parameters to be selected and the notices information is relative to when library staff run the report. Information displayed includes the patron name, patron ID, patron type, notice type (e.g. lost, first overdue, hold pickup, etc.), the count of how many notices of that notice types, and the delivery method (e.g. email, phone, paper).

Report 11021 – Bounced Email

Default Template: Crystal Report

This report displays information for patron accounts and associated notices where notice processing has indicated a bounced email address. Report output can be limited by a date range, which applies to the date the notice was generated, as well as, by branch. Information such as the patron ID, patron email address, and notice type is included.