

## Reports Overdue

### Create new List or Notice

The new report is selected from the reports tab, the tabs are subject headings, under the tabs (headings) are reports. The reports can be modified and saved under the templates tab.

**Note:** If a tab in the report is not discussed, the tab is untouched and the default settings are acceptable.

**Open Scheduled New reports wizard, List Charges/Items report is under tab, Circulation.**

**NOTE:** Best practice is to run List reports by home room.

**Basic tab** gives the report name, do not change the report name – add unique identifier

Screenshot of the 'Schedule New Reports : Schedule List Users with Charges' wizard, Basic tab. The form contains the following fields:

- Report name: List Users with Charges Room ...
- Description: A list of users with charges.
- Title: List of Users with Charges
- Footer:

### Charge selection tab

- Overdue radio buttons identifies items to print that are:
- Overdue (Yes)
- Items charged but NOT Overdue (No)
- All items checked out and or Overdue (Both)

Screenshot of the 'Schedule New Reports : Schedule List Users with Charges' wizard, Charge Selection tab. The form contains the following fields:

- Library: [Dropdown]
- Current location: [Dropdown]
- Date charged: [Dropdown]
- Date due: [Dropdown]
- Overdue:  Yes  No  Both
- Accrued fine: [Dropdown]
- Date renewed: [Dropdown]
- Number of renewals: [Dropdown]
- Date claims returned: [Dropdown]
- Date recalled: [Dropdown]
- Date notice sent: [Dropdown]
- Number of overdue notices: [Dropdown]
- Number of recall notices: [Dropdown]
- Circulation rule: [Dropdown]

### User Selection tab

- Enter **exactly** how the room field is on the patron record.

The screenshot shows the 'User Selection' tab in a software interface. It contains various input fields for filtering users, including Library, User profile, five User category fields, Department, Birth date, three Address entry fields, Date created, Privilege granted date, Privilege exp. date, Last activity date, Title, and Extended info. Each field has a dropdown arrow icon. A checkbox labeled 'blank field matches with Not Equal qualifier' is checked. Below these fields are several numerical input fields: Number of charges, Number of reserve charges, Number of total charges, Number of holds, Number of bookings, Number of reserves, and Number of open orders.

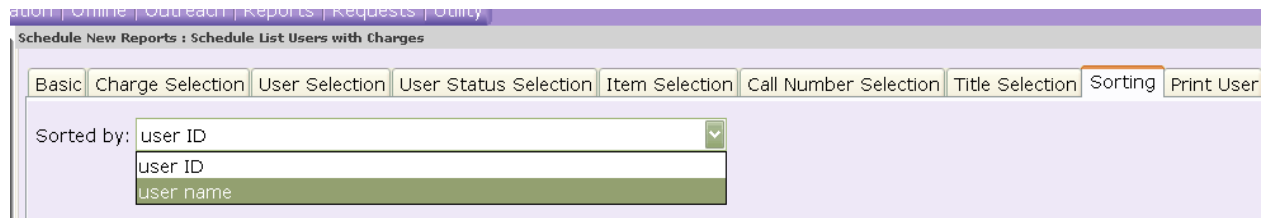
### Call Number Selection tab

- Number of copies field, enter greater than 0, this avoids error 111 in the report.

The screenshot shows the 'Call Number Selection' tab in the same software interface. It features input fields for Library, Call number range, Class scheme, Number of copies (with '>0' entered), Number of call holds, Number of copies on reserve, and Bound-with. The 'Shaded' field has radio buttons for 'Yes', 'No', and 'Both', with 'Both' selected. A 'Common Tasks' sidebar is visible on the left, listing actions like CheckOut, Discharge/Checkin, Renew Single Item, Item Search, Modify Due Dates, Check Item Status, Ephemeral, Mark Item Used, Pay Bill, Display User, Schedule New Reports, and Finished Reports.

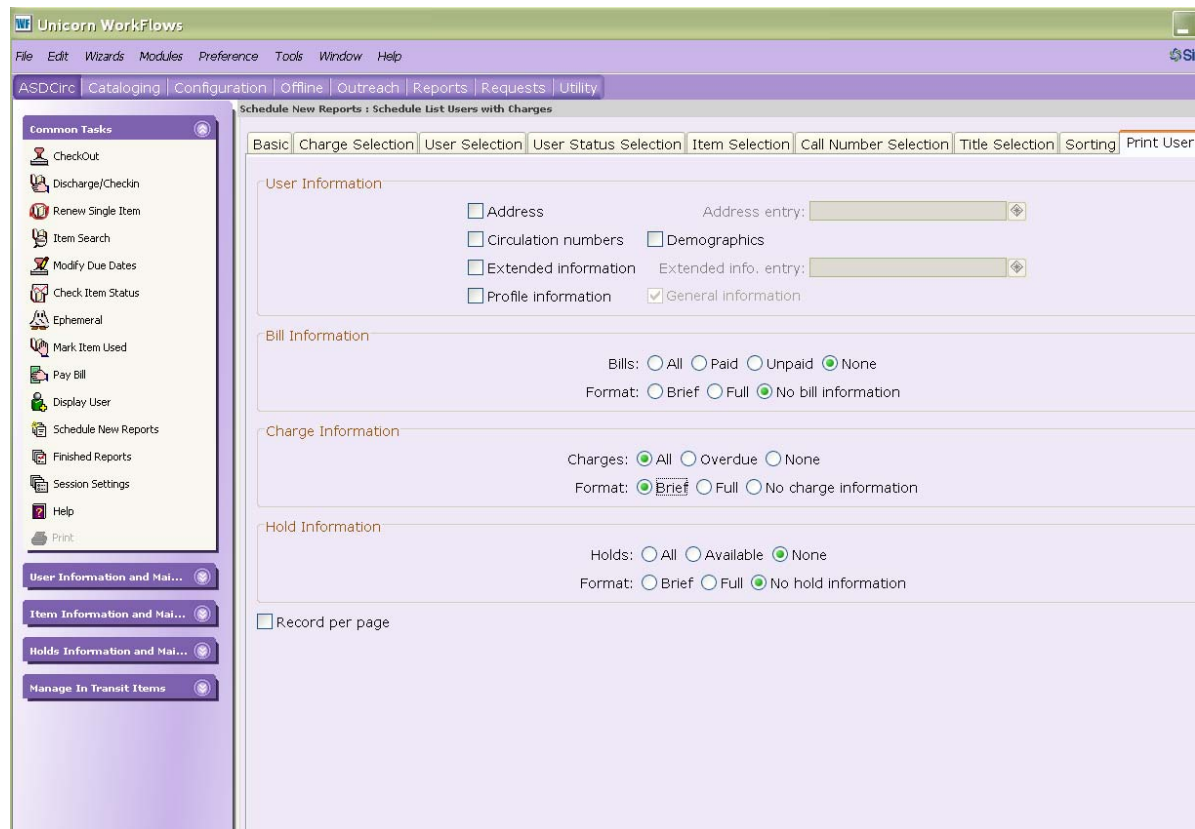
### Sorting tab

- Common selection is User Name



### Print User tab

- Common selections in screen – selections are print display options

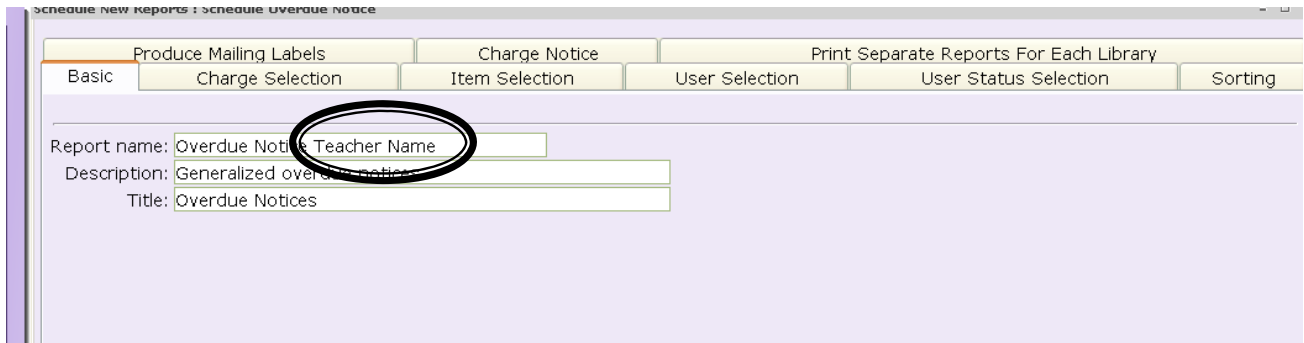


**Open Scheduled New reports wizard, an Overdue Notice report is under tab, Circulation.**

**NOTE:** The finished report does not page break cleanly after every patrons list of items, it is best practice to run the report by home room teacher.

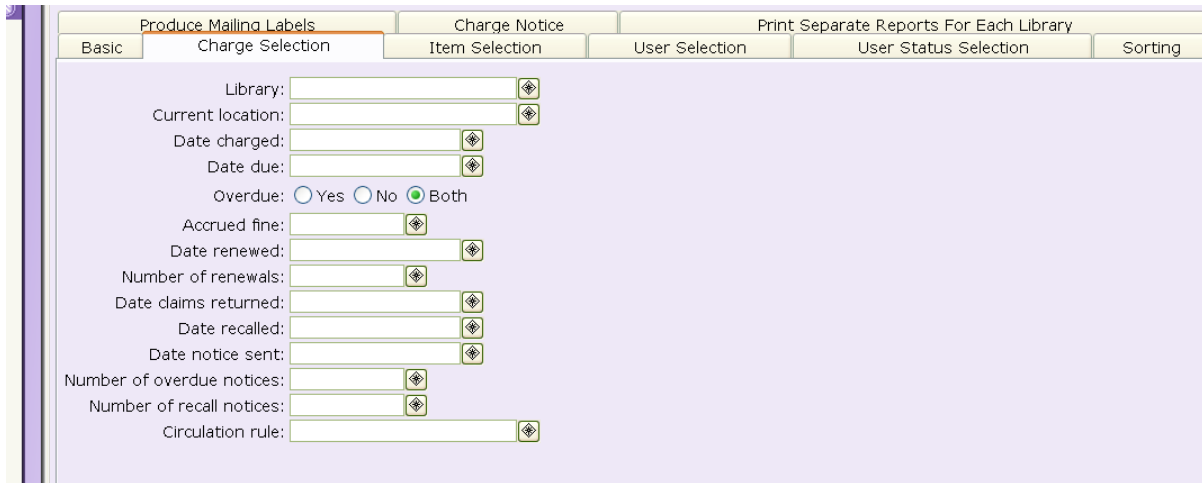
**Note:** If a tab in the report is not discussed, the tab is untouched and the default settings are acceptable.

**Basic tab** gives the report name, do not change the report name – add unique identifier



### Charge selection tab

- Overdue radio buttons identifies items to print that are:
- Overdue (Yes)
- Items charged but NOT Overdue (No)
- All items checked out and or Overdue (Both)



### User Selection tab

- Enter **exactly** how the room field is on the patron record.

The screenshot shows a web-based interface for configuring a report. At the top, there are several tabs: 'Produce Mailing Labels', 'Charge Notice', 'Print Separate Reports For Each Library', 'Basic', 'Charge Selection', 'Item Selection', 'User Selection', 'User Status Selection', and 'Sorting'. The 'User Selection' tab is currently active. Below the tabs, there is a list of fields for user selection, each with a dropdown arrow icon:

- Library:
- User profile:
- User category 1:
- User category 2:
- User category 3:
- User category 4:
- User category 5:
- Department:
- Birth date:
- Address1 entry: **2009/2010 ROOM**
- Address2 entry:
- Address3 entry:
- Date created:
- Privilege granted date:
- Privilege exp. date:
- Last activity date:
- Title:

### Sorting tab

- See screen shot for options

The screenshot shows the same interface as above, but with the 'Sorting' tab selected. The 'Sorted by:' dropdown menu is open, displaying the following options:

- user ID
- group ID
- user ID
- user name
- zip code

**Charge Notice tab**

- Review the selections made in the screen shot.
- Best practice is the count notice sent radio button is off, as multiple notices are sent the message language to return gets very stern.
- The option to have the defaulted item price display on the notice is on the bottom of the tab.

