

Reports Overdue  
 Print display of Overdue reports List and Notice  
 Create new List or Notice

Depending on how and what information you want in print, there are 3 list charges reports.

❖ List Charges

Displays User name and ID number, Item title copy number and barcode number, owning library

| Charge List  |                       |                |         |                  |          |  |
|--|-----------------------|----------------|---------|------------------|----------|--|
| Produced Thursday, July 24, 2008 at 2:36 PM                                      |                       |                |         |                  |          |  |
| USER NAME  | USER ID               | CHARGED        |         |                  |          |  |
| DUE  | RENEWED               | RENEWALS       | OVERDUE | RECALL           | RECALLED |  |
| LOCATION   | LIBRARY               |                |         |                  |          |  |
| 821 A  | copy:1 31418000135159 |                |         |                  |          |  |
| An Arkful of animals / selected by William Cole ; illustrated by Lynn Munsinger. |                       |                |         |                  |          |  |
| Cole, William, 1919-   |                       |                |         |                  |          |  |
|  | COTTON, HAILEY        | 21002004038197 |         | 11/28/2006,10:04 |          |  |
| 12/12/2006,23:59   |                       | 0              | 0       | 0                |          |  |
| CHECKEDOUT   | GLADYS_WD             |                |         |                  |          |  |
| BAL  | copy:1 31100000252107 |                |         |                  |          |  |
| Chasing Vermeer / by Blue Balliett ; with artwork by Brett Helquist.             |                       |                |         |                  |          |  |
| Balliett, Blue, 1955-  |                       |                |         |                  |          |  |
|  | SALANGUIT, ALLIANA    | 21002001077164 |         | 4/15/2008,14:35  |          |  |
| 5/6/2008,23:59   |                       | 0              | 0       | 0                |          |  |
| CHECKEDOUT   | ABBOTT_LP             |                |         |                  |          |  |

❖ List Items with charges

Displays only item information, no patron information

| Charge Item                                 |   |                   |                                       |
|---|---|-------------------|---------------------------------------|
| Produced Thursday, July 24, 2008 at 3:25 PM |   |                   |                                       |
| 1978  | Title: An Arkful of animals / selected by William Cole ; illustrated by Lynn Munsinger. |                   |                                       |
| 821 A                                       | copy:1  | id:31418000135159 | library:GLADYS_WD location:CHECKEDOUT |
| 2003  | Title: Chasing Vermeer / by Blue Balliett ; with artwork by Brett Helquist.             |                   |                                       |
| BAL   | copy:1  | id:31100000252107 | library:ABBOTT_LP location:CHECKEDOUT |

❖ List Users with Charges

Displays Username and ID number, title of item date charged, date due, copy number and owning library name, NO item barcode

List of Users with Charges

Produced Thursday, July 24, 2008 at 3:33 PM

CLARK, DA'JAH M  
id:21002001032128 library:ABBOTT\_LP

\*Charges:2

LEW copy:3 ABBOTT\_LP  
The voyage of the Dawn Treader / C.S. Lewis ; illustrated by Pauline Baynes.  
Lewis, C. S. (Clive Staples), 1898-1963.  
charged:8/29/2007,10:20 due:9/19/2007,23:59 price:\$6.99

BRU copy:5 ABBOTT\_LP  
Skeleton man / Joseph Bruchac.  
Bruchac, Joseph, 1942-  
charged:9/19/2007,10:16 due:10/10/2007,23:59 price:\$19.00

COCKERHAM, CHYMIRA  
id:21002001043760 library:ABBOTT\_LP

\*Charges:1

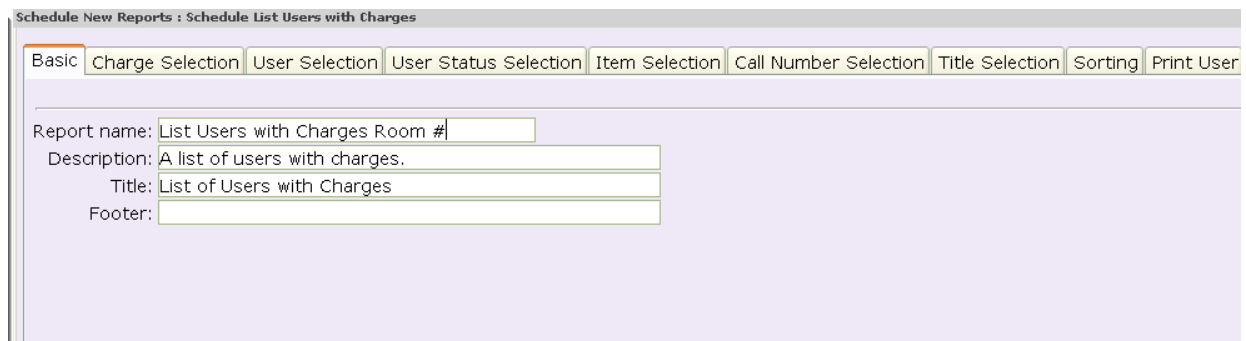
SAC copy:2 ABBOTT\_LP  
Sideways stories from Wayside School / Louis Sachar ; illustrated by Julie Brinckloe.  
Sachar, Louis, 1954-  
charged:1/14/2005,11:24 due:1/28/2005,23:59 price:\$0.02

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

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

**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)

Screenshot of the 'Charge Selection' tab in the 'Schedule New Reports : Schedule List Users with Charges' interface. The interface shows various filter fields for charges, including Library, Current location, Date charged, Date due, Overdue (radio buttons for Yes, No, Both), Accrued fine, Date renewed, Number of renewals, Date claims returned, Date recalled, Date notice sent, Number of overdue notices, Number of recall notices, and Circulation rule.

### User Selection tab

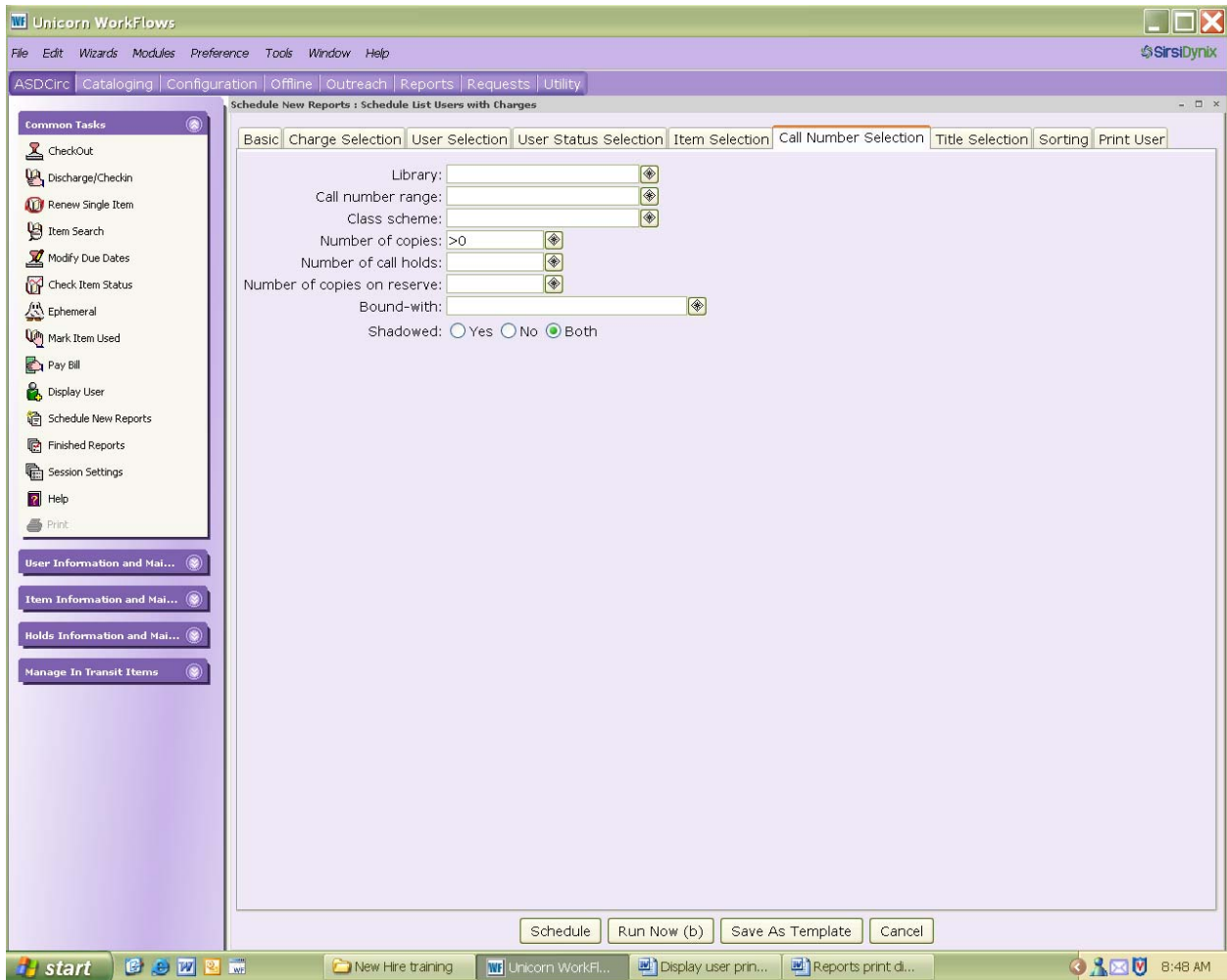
- Enter **exactly** how the zip code field is on the patron record.

**NOTE:** Zip field is a true number field, best practice is to enter numerical data only.

Screenshot of the 'User Selection' tab in the 'Schedule New Reports : Schedule List Users with Charges' interface. The interface shows various filter fields for user selection, including Library, User profile, User category 1-5, Department, Birth date, Address1 entry (with a sample '\*ZIP\*0\*@\*Jackson'), Address2 entry, Address3 entry, Date created, Privilege granted date, Privilege exp. date, Last activity date, Title, Extended info, and a checked checkbox for 'blank field matches with Not Equal qualifier'. It also includes fields for 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.

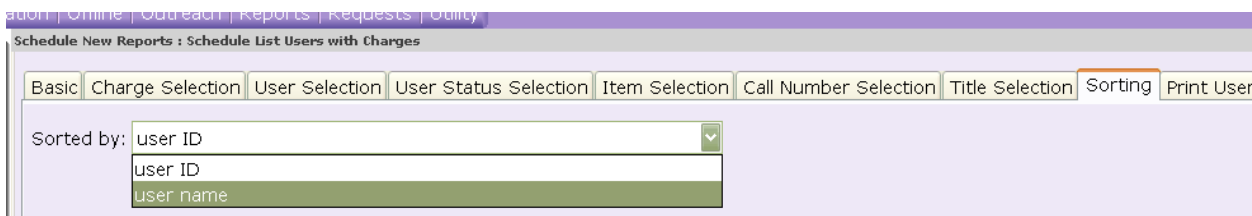
### Call Number Selection tab

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



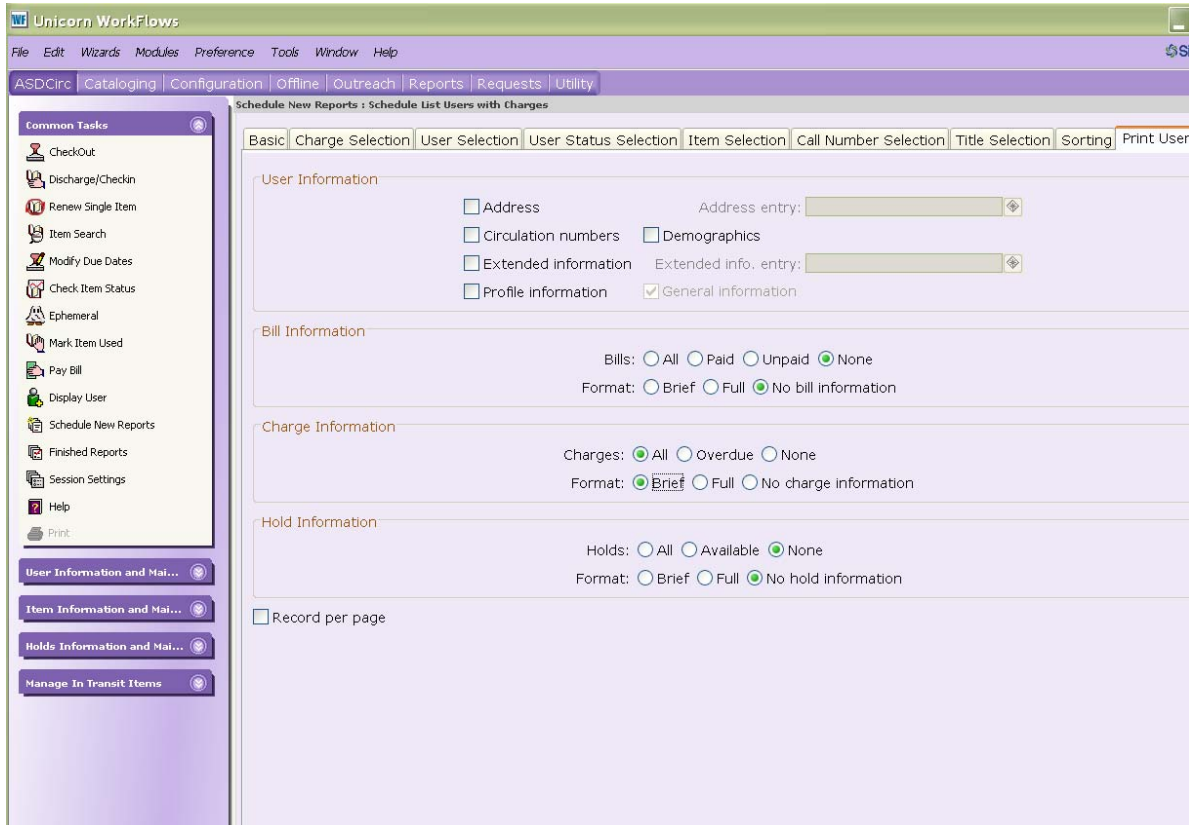
### Sorting tab

- Common selection is User Name



## Print User tab

- Common selections in screen – selections are print display options



## Overdue Notice print display

Monday, July 28, 2008

DA'JAH M CLARK (Patron Name)  
Jackson (Teacher)

### "OVERDUE NOTICE"

The following Library materials are overdue. Please return them to the library as soon as possible. Thank you.

- 1 call number:BRU ID:31100000262387  
Skeleton man / Joseph Bruchac.  
Bruchac, Joseph, 1942-  
due:10/10/2007,23:59 price:\$19.00
- 2 call number:LEW ID:31100000254111  
The voyage of the Dawn Treader / C.S. Lewis ; illustrated by Pauline Baynes.  
Lewis, C. S. (Clive Staples), 1898-1963.  
due:9/19/2007,23:59 price:\$6.99

### Create new report

**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

The screenshot shows the 'Schedule New Reports' wizard with the 'Basic' tab selected. The report name is 'Overdue Notice Teacher Name', the description is 'Generalized overdue notices', and the title is 'Overdue Notices'. The 'Charge Selection' tab is circled in black.

### 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)

The screenshot shows the 'Charge Selection' tab with various selection options. The 'Overdue' radio buttons are set to 'Both'. Other options include Library, Current location, Date charged, Date due, Accrued fine, Date renewed, Number of renewals, Date claims returned, Date recalled, Date notice sent, Number of overdue notices, Number of recall notices, and Circulation rule.

### User Selection tab

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

**NOTE:** Zip field is a true number field, best practice is to enter numerical data only.

The screenshot shows the 'User Selection' tab of a report configuration window. The window has a title bar with 'Produce Mailing Labels', 'Charge Notice', and 'Print Separate Reports For Each Library'. Below the title bar are tabs for 'Basic', 'Charge Selection', 'Item Selection', 'User Selection', 'User Status Selection', and 'Sorting'. The 'User Selection' tab is active and contains a list of fields with dropdown menus for selection:

- Library:
- User profile:
- User category 1:
- User category 2:
- User category 3:
- User category 4:
- User category 5:
- Department:
- Birth date:
- Address1 entry: \*ZIP\*0\*@\*Jackson
- 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 'Sorting' tab of the same report configuration window. The 'Sorted by:' dropdown menu is open, showing 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.

Schedule New Reports : Schedule Overdue Notice

Basic Charge Selection **Item Selection** User Selection User Status Selection Sorting

Produce Mailing Labels Charge Notice Print Separate Reports For Each Library

Count as a notice sent  
 Combine Notices  
 Library address on notice  
 Use Library Address in Patron Record

Select 'Sent-From' Library: [dropdown]

Library address:  Primary  Address 1  Address 2  Address 3

Salutation on notice  
 User ID on notice  
 Group ID on notice

Message 1: [=0,1stoverdue] [dropdown]  
Message 2: [=1,2ndoverdue] [dropdown]  
Message 3: [>1,finaloverdue] [dropdown]  
Message 4: [ ] [dropdown]  
Message 5: [ ] [dropdown]

Closing text: [dropdown]

Notice type:  Overdue  Recall

Title information to print with due date and time:  Brief bibliographic information  
 Call number

Price and fine information to print:  Accrued fine  
 Item price  
 Generate pipe delimited output

Schedule Run Now (b) Save As Template Cancel

Unicorn WorkFl... 4:30 PM