

Oops, I accidentally deleted something (and other small problems): bite-sized reports to help you find and fix problems in your ILS

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Andrea Buntz Neiman, Kent County Public Library

# Reports

Cataloging Review -- Forest Doyle

Deleted Items; Bibs Without Items; Item Full Circ History; Patron Full Circ History;  
Patron Finder and Item Finder; Checkin Check -- Andrea Buntz Neiman

Hopeless Holds -- Lise Keppler

Large Print Records -- April Durrence

# General Recommendations

- Use the source closest to your data “question”
- Know what you’re looking for
- Pull a larger dataset and refine it in Excel
- Save barcodes to \*.txt file for Item Status import
- Use \*.csv output for certain data types
- Filter on delete flag

# Report: Cataloging Review

- Displays information on items added within a specified time period
- Remotely check for problems with call number structure, item attributes, and (with a little work) bibliographic record edits of newly added items.
- Errors are caught and corrected before item has a chance to circulate.
- Identify recurring problems with specific staff members.

# Cataloging Review

- Source: Item

Template Configuration

Name:

Description:

Documentation URL:

Displayed Fields |  |

Display Name	Data Type	Field Transform
Barcode	text	Raw Data
Creation Date/Time	timestamp	Date
OPAC/Staff Client User Name	text	Raw Data
Call Number Label	text	Raw Data
Shelving Location	text	Raw Data
Circulation Modifier	text	Raw Data
Owning Library	text	Raw Data

Source Specification 29

Item  
Item :: Creating User  
Item -> ILS User :: Main (Profile) Permission Group  
Item :: Shelving Location  
Item :: Call Number/Volume  
Item :: Circulation Modifier  
Item -> Call Number/Volume :: Owning Library

# Cataloging Review: Display Fields

<b>Display Name</b>	<b>Data Type</b>	<b>Field Transform</b>	<b>Source</b>
Barcode	Text	Raw data	Item
Creation Date/Time	Timestamp	Date	Item
OPAC/Staff Client User Name	Text	Raw data	Item::Creating User
Call Number Label	Text	Raw data	Item::Call number/Volume
Shelving Location	Text	Raw data	Item::Shelving Location
Circulation Modifier	Text	Raw data	Item::Circulation Modifier
Owning Library	Text	Raw data	Item-->Call Number/Volume:: Owning Library

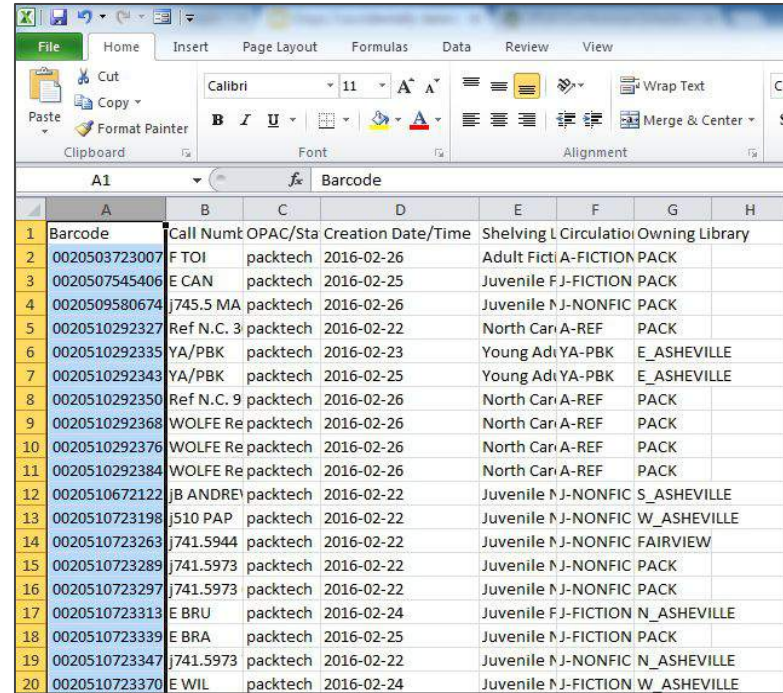
# Cataloging Review: Filters

- This report only uses base filters

<b>Filter Field</b>	<b>Transform</b>	<b>Operator</b>	<b>Source</b>
Creation Date/Time	Age	Less than	Item
Home Library	Raw data	In list	Item::Creating User
Group ID	Raw data	In list	Item-->ILS User::Main (Profile) Permission Group

# Cataloging Review: Output

- Designed to produce a large data set
- Export to Excel to further refine results through filtering.
- Filter by circulation modifier to check for consistent application of item attributes and call number structures

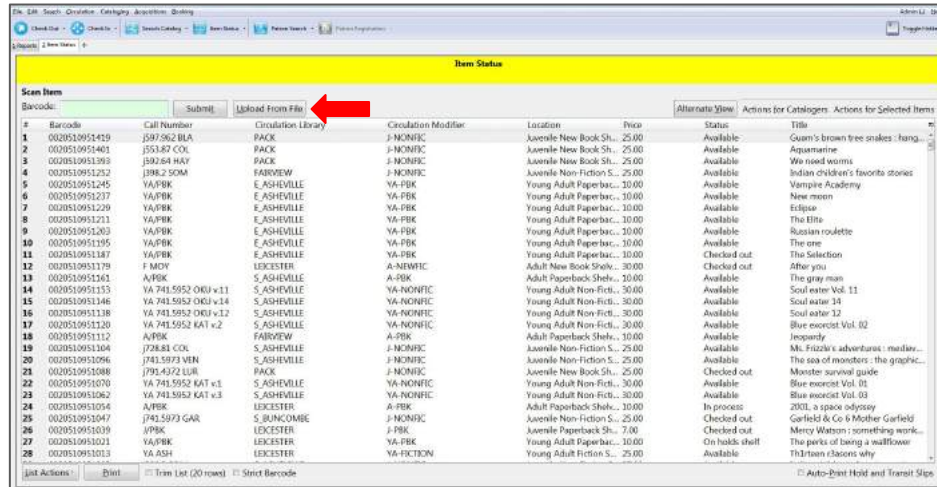


	A	B	C	D	E	F	G	H
1	Barcode	Call Num	OPAC/Sta	Creation Date/Time	Shelving L	Circulation	Owning Library	
2	0020503723007	F TOI	packtech	2016-02-26	Adult Ficti	A-FICTION	PACK	
3	0020507545406	E CAN	packtech	2016-02-25	Juvenile F	J-FICTION	PACK	
4	0020509580674	j745.5 MA	packtech	2016-02-26	Juvenile M	J-NONFIC	PACK	
5	0020510292327	Ref N.C. 3	packtech	2016-02-22	North Cari	A-REF	PACK	
6	0020510292335	YA/PBK	packtech	2016-02-23	Young Ad	YA-PBK	E_ASHEVILLE	
7	0020510292343	YA/PBK	packtech	2016-02-25	Young Ad	YA-PBK	E_ASHEVILLE	
8	0020510292350	Ref N.C. 9	packtech	2016-02-26	North Cari	A-REF	PACK	
9	0020510292368	WOLFE Re	packtech	2016-02-26	North Cari	A-REF	PACK	
10	0020510292376	WOLFE Re	packtech	2016-02-26	North Cari	A-REF	PACK	
11	0020510292384	WOLFE Re	packtech	2016-02-26	North Cari	A-REF	PACK	
12	0020510672122	jB ANDRE	packtech	2016-02-22	Juvenile M	J-NONFIC	S_ASHEVILLE	
13	0020510723198	j510 PAP	packtech	2016-02-22	Juvenile M	J-NONFIC	W_ASHEVILLE	
14	0020510723263	j741.5944	packtech	2016-02-22	Juvenile M	J-NONFIC	FAIRVIEW	
15	0020510723289	j741.5973	packtech	2016-02-22	Juvenile M	J-NONFIC	PACK	
16	0020510723297	j741.5973	packtech	2016-02-22	Juvenile M	J-NONFIC	PACK	
17	0020510723313	E BRU	packtech	2016-02-24	Juvenile F	J-FICTION	N_ASHEVILLE	
18	0020510723339	E BRA	packtech	2016-02-25	Juvenile M	J-FICTION	PACK	
19	0020510723347	j741.5973	packtech	2016-02-22	Juvenile M	J-NONFIC	N_ASHEVILLE	
20	0020510723370	E WIL	packtech	2016-02-24	Juvenile M	J-FICTION	W_ASHEVILLE	



# Cataloging Review: Output

- Saving item barcodes as a .txt file allows for batch import in Item Status screen
- Review bibliographic records



The screenshot shows the 'Item Status' screen in a library cataloging system. The interface includes a menu bar at the top with options like 'Check Out', 'Check In', 'Search Catalog', 'Item Status', and 'Patron Search'. Below the menu is a toolbar with buttons for 'Submitt', 'Upload From File', and 'Patron Search'. The main area is a table with columns for 'Barcode', 'Call Number', 'Circulation Library', 'Circulation Modifier', 'Location', 'Price', 'Status', and 'Title'. A red arrow points to the 'Upload From File' button. The table contains 28 rows of data, each representing a cataloged item with its respective barcode, call number, and title.

#	Barcode	Call Number	Circulation Library	Circulation Modifier	Location	Price	Status	Title
1	0020951095419	J97.562 BIA	PACK	J-NONFIC	Juvenile New Book Sh.	25.00	Available	Guam's brown tree snakes : hana...
2	0020951095401	J51.87 COL	PACK	J-NONFIC	Juvenile New Book Sh.	25.00	Available	Aquarium
3	0020951095393	J92.64 MOY	PACK	J-NONFIC	Juvenile New Book Sh.	25.00	Available	We read worms
4	0020951095252	J98.2 SOM	FARVIEW	J-NONFIC	Juvenile Non-Fiction S.	25.00	Available	Indian children's favorite stories
5	00209510951245	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Available	Vampire Academy
6	0020951095227	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Available	New moon
7	00209510951229	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Available	Eclipse
8	00209510951211	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Available	The Elite
9	00209510951203	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Available	Russian roulette
10	00209510951195	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Available	The one
11	00209510951187	YA/PBK	E_ASHVILLE	YA-PBK	Young Adult Paperbac...	10.00	Checked out	The Selection
12	00209510951179	F MOY	LECESTER	A-NONFIC	Adult New Book Sh.	30.00	Checked out	After you
13	00209510951161	A/PBK	S_ASHVILLE	A-PBK	Adult Paperback Shek...	10.00	Available	The gray man
14	00209510951153	YA 741.5952 OKJ v11	S_ASHVILLE	YA-NONFIC	Young Adult Non-Fict...	30.00	Available	Soul eater Vol. 11
15	00209510951146	YA 741.5952 OKJ v14	S_ASHVILLE	YA-NONFIC	Young Adult Non-Fict...	30.00	Available	Soul eater 14
16	00209510951138	YA 741.5952 OKJ v12	S_ASHVILLE	YA-NONFIC	Young Adult Non-Fict...	30.00	Available	Soul eater 12
17	00209510951120	YA 741.5952 KAT v2	S_ASHVILLE	YA-NONFIC	Young Adult Non-Fict...	30.00	Available	Blue exorcist Vol. 02
18	00209510951112	A/PBK	FARVIEW	A-PBK	Adult Paperback Shek...	10.00	Available	Inesperly
19	00209510951104	J728.81 COL	S_ASHVILLE	J-NONFIC	Juvenile Non-Fiction S.	25.00	Available	Mt. Fizzler's adventures : madley...
20	00209510951096	J741.5973 VEN	S_ASHVILLE	J-NONFIC	Juvenile Non-Fiction S.	25.00	Available	The sea of monsters : the graphic...
21	00209510951088	J795.4272 LUR	PACK	J-NONFIC	Juvenile New Book Sh.	25.00	Checked out	Monster survival guide
22	00209510951070	YA 741.5952 KAT v1	S_ASHVILLE	YA-NONFIC	Young Adult Non-Fict...	30.00	Available	Blue exorcist Vol. 01
23	00209510951062	YA 741.5952 KAT v3	S_ASHVILLE	YA-NONFIC	Young Adult Non-Fict...	30.00	Available	Blue exorcist Vol. 03
24	00209510951054	A/PBK	LECESTER	A-PBK	Adult Paperback Shek...	10.00	In process	2001, a space odyssey
25	00209510951047	J741.5973 GARR	S_BUNCOMBE	J-NONFIC	Juvenile Non-Fiction S.	25.00	Checked out	Garfield & Co.'s Mother Garfield
26	00209510951039	VPBK	LECESTER	J-PBK	Juvenile Paperback Sh...	7.00	Checked out	Mercy Watson : something work...
27	00209510951021	YA/PBK	LECESTER	YA-PBK	Young Adult Paperbac...	10.00	On hold: shelf	The parks of being a wallflower
28	00209510951013	YA ASH	LECESTER	YA-FICTION	Young Adult Fiction S.	25.00	Available	Thirteen classes why

# Whoops, I Just Deleted... : Display & Filter Fields

<b>Display Name</b>	<b>Data Type</b>	<b>Field Transform</b>	<b>Source</b>
TCN Value	Text	Raw data	Bibliographic Record
Title Proper (normalized)	Text	Raw data	Bibliographic Record :: Simple Record Extracts

<b>Filter Field</b>	<b>Field Transform</b>	<b>Operator</b>	<b>Source</b>
Title Proper (normalized)	Raw data	Contains Matching Substring (ignore case)	Bibliographic Record :: Simple Record Extracts

# Whoops, I Just Deleted... : Build & Output

You are logged in as abn

Template Name:	whoops, I just deleted ....
Template Creator:	abn
Template Description:	title (searchable) and TCN
Report Name:	<input type="text" value="cecil burial ground"/>
Report Description:	<input type="text"/>
Report Columns:	TCN Value Title Proper (normalized)
Choose a folder to store this report definition:	Selected Folder: Whip <a href="#">Report Folders</a> <a href="#">Karen's Reports</a> <a href="#">Scheduled Reports</a> <a href="#">Whip</a>

Column	Transform	Action	User Params
Bibliographic Record -> Simple Record Extracts -> Title Proper (normalized)	Raw Data	Contains Matching substring (ignore case)	<input type="text" value="cecil burial"/>

	A	B
1	TCN Value	Title Proper (normalized)
2	54505	the cecil burial ground handbook
3	s11672	the cecil burial ground handbook
4		

# Bibs without items (Empty Volumes): Display & Filter Fields

Display Name	Data Type	Field Transform	Source
Record ID	id	Raw Data	Last Copy Delete Time
Delete Date/Time	timestamp	Date	Last Copy Delete Time

Filter Field	Field Transform	Operator	Value	Source
Is Deleted?	Raw Data	Equals	False	Last Copy Delete Time :: Record ID

# Bibs without items (Empty Volumes): Output & Example

	A	B
1	Record ID	Delete Date/Time
2	8442	2015-12-07
3	34988	2016-01-05
4	40394	2015-12-07
5	71956	2015-12-07
6	91039	2016-01-05
7	94184	2015-09-15
8	107835	2016-01-05
9	109556	2015-10-08
10	109767	2016-02-11
11	112950	2016-02-11
12	118110	2016-02-11
13	118145	2016-01-14
14	121073	2016-02-11
15	122840	2015-08-13
16	123613	2015-10-08
17	125247	2016-01-25
18	128971	2016-02-27
19	129017	2016-01-05
20	132446	2016-02-27

**Holdings Maintenance**

KCPL Kent County Public Library Limit:

Show Volumes  Show Items  Hide Empty Libs Refresh

Location/Barcode	Volumes	Copies	Owning
▲ KCPL : Kent County Public Library			
CHES : Chestertown Branch	0	<0>	
▲ NCO : North County Branch	1	<0>	
BIO HEPBURN		0	NCO
RH : Rock Hall Branch	0	<0>	

# Item Full Circ History: Display & Filter Fields

Display Name	Data Type	Field Transform	Source
Circulating Library	text	Raw Data	Circulation :: Circulating Library
Check Out Date/Time	timestamp	Raw Data	Circulation
Check In Date/Time	timestamp	Raw Data	Circulation
Item Barcode	text	Raw Data	Circulation :: Circulating Item
Patron Barcode	text	Raw Data	Circulation -> ILS User :: All Library Cards

Filter Field	Field Transform	Operator	Value	Source
Barcode	Raw Data	Equals		Circulation :: Circulating Item
IsActive?	Raw Data	Equals	True	Circulation -> ILS User :: All Library Cards

# Item Full Circ History: Build & Output

Template Name:	Item Circulation History By Barcode (Single Item)
Template Creator:	abn
Template Description:	Circ Library, CKO date, CKI date, item barcode, patron barcode. Filters includes all items regardless of delete status.
Report Name:	33859001003938
Report Description:	
Report Columns:	<p><b>Circulating Library</b>  <b>Check Out Date/Time</b>  <b>Check In Date/Time</b>  <b>Item Barcode</b>  <b>Patron Barcode</b></p>
Choose a folder to store this report definition:	<p>Selected Folder:</p> <ul style="list-style-type: none"> <li> <a href="#">Report Folders</a></li> <li> <a href="#">Karen's Reports</a></li> <li> <a href="#">Scheduled Reports</a></li> <li> <a href="#">Whip</a></li> </ul>
<b>Column</b>	<b>Transform</b> <b>Action</b>
Circulation -> Circulating Item -> Barcode	Raw Data   Equals
Circulation -> Patron -> All Library Cards -> IsActive?	Raw Data   Equals

	A	B	C	D	E
1	<b>Circulating Library</b>	Check Out Date/Time	Check In Date/Time	Item Barcode	Patron Barcode
2	CHES	2008-04-09 17:10:00-04	2008-04-29 17:08:00-04	33859001003938	2385900003
3	CHES	2008-08-16 13:10:26-04	2008-09-02 11:44:57.9609-04	33859001003938	2385900001
4	CHES	2008-10-28 11:42:02-04	2008-11-18 14:19:24.570514-05	33859001003938	2385900002
5	CHES	2009-01-09 11:39:01-05	2009-01-30 09:49:57.747862-05	33859001003938	2385900002
6	CHES	2009-01-30 09:49:57-05	2009-02-20 11:21:35.174229-05	33859001003938	2385900002
7	CHES	2009-02-20 11:21:35-05	2009-03-13 11:21:45.425197-04	33859001003938	2385900002
8	CHES	2010-01-05 10:49:44-05	2010-01-26 15:25:16.841786-05	33859001003938	2385900002
9	CHES	2010-04-17 11:49:29-04	2010-05-13 10:07:39.989118-04	33859001003938	2385900003
10	CHES	2010-05-13 10:08:31-04	2010-06-18 12:26:59.014963-04	33859001003938	2385900003
11	CHES	2010-06-18 12:26:59-04	2010-07-10 00:00:00-04	33859001003938	2385900003
12	CHES	2010-07-14 09:24:49-04	2010-08-17 14:00:12.63502-04	33859001003938	2385900002
13	CHES	2010-12-09 16:55:50-05	2010-12-16 12:58:47.307549-05	33859001003938	2385900003
14	CHES	2011-08-10 14:02:07-04	2011-08-31 13:54:23.051423-04	33859001003938	2385900002
15	CHES	2011-09-21 15:58:50-04	2011-10-04 23:59:59-04	33859001003938	2385900004
16	CHES	2011-12-02 12:37:09-05	2011-12-16 13:40:46.470283-05	33859001003938	2385900003
17	CHES	2012-01-04 10:03:39-05	2012-01-25 13:51:40.699723-05	33859001003938	2385900004
18	CHES	2012-02-22 09:18:31-05	2012-03-08 15:30:04.673327-05	33859001003938	2385900002
19	CHES	2012-03-08 15:30:04-05	2012-03-27 10:13:45.179792-04	33859001003938	2385900002
20	CHES	2012-06-14 15:30:33-04	2012-06-25 14:57:43.068161-04	33859001003938	2385900004
21	CHES	2012-06-26 12:52:22-04	2012-07-02 13:59:39.616416-04	33859001003938	2385900002
22	CHES	2013-04-26 16:48:28-04	2013-05-16 16:15:22.978034-04	33859001003938	2385900003
23	CHES	2013-09-19 14:54:05-04	2013-10-02 14:18:07.205648-04	33859001003938	2385900003
24	CHES	2014-05-20 11:58:29-04	2014-05-27 11:42:09.288563-04	33859001003938	2385900003

# Patron Full Circ History: Display & Filter Fields

Display Name	Data Type	Field Transform	Source
Patron Barcode	text	Raw Data	Circulation -> ILS User :: All Library Cards
Check Out Date/Time	timestamp	Raw Data	Circulation
Check In Date/Time	timestamp	Raw Data	Circulation
Item Barcode	text	Raw Data	Circulation :: Circulating Item
Author (normalized)	text	Raw Data	Circulation -> Item -> Call Number/Volume -> Bibliographic Record :: Simple Record Extracts
Title Proper (normalized)	text	Raw Data	Circulation -> Item -> Call Number/Volume -> Bibliographic Record :: Simple Record Extracts

Filter Field	Field Transform	Operator	Source
Barcode	Raw Data	Equals	Circulation -> ILS User :: All Library Cards



# Patron Full Circ History: Build & Output

Template Name:	Patron circ history (clone) -- with checkin date added
Template Creator:	abn
Template Description:	
Report Name:	23859000312894

	A	B	C	D	E	F
Report	Patron Barcode	Check Out Date/Time	Check In Date/Time	Item Barcode	Author (normalized)	Title Proper (normalized)
2	23859000312894	2015-05-04 11:08:34-04	2015-05-04 11:29:44.382111-04	33859000690149	brand, max	tales of the wild west
3	23859000312894	2015-05-04 11:08:37-04	2015-05-04 11:29:46.564728-04	33859001094267	brunstetter, wanda e	the bishops daughter
4						

Report Columns:	Check In Date/Time Barcode Author (normalized) Title Proper (normalized)
Choose a folder to store this report definition:	Selected Folder: <ul style="list-style-type: none"> <li> <a href="#">Report Folders</a></li> <li> <a href="#">Karen's Reports</a></li> <li> <a href="#">Scheduled Reports</a></li> <li> <a href="#">Whip</a></li> </ul>

Column	Transform	Action	User Params
Circulation -> Patron -> All Library Cards -> Barcode	Raw Data	Equals	3859000312894

# Patron Finder & Item Finder: Display & Filter Fields

## Patron

Display Name		Data Type	Field Transform	Source
Patron Barcode		text	Raw Data	ILS User :: All Library Cards
Filter Field	Field Transform	Operator		Source
Barcode	Raw data	Contains Matching Substring		ILS User :: All Library Cards

## Item

Display Name		Data Type	Field Transform	Source
Item Barcode		text	Raw Data	Item
Filter Field	Field Transform	Operator		Source
Barcode	Raw data	Contains Matching Substring		Item

# Patron Finder & Item Finder: Output

Patron Barcode

Parameter = 208

	A
1	Patron Barcode
2	2152600220
3	2199700420
4	2353600070
5	2385900000
6	2385900000
7	2385900000
8	2385900000
9	2385900000
10	2385900010
11	2385900010
12	2385900010
13	2385900010
14	2385900010
15	2385900010
16	2385900010
17	2385900020
18	2385900020
19	2385900020

Item Barcode

Parameter = 6135

	A
1	Item Barcode
2	30036000861359
3	31267501061350
4	31885002661350
5	31885006135203
6	33859000061358
7	33859000661355
8	33859000861351
9	33859000886135
10	33859000961359
11	33859000966135
12	33859001161355
13	33859001206135
14	33859001361351
15	33859001386135
16	33859001461359
17	33859001466135
18	33859001536135
19	33859002456135

# Checkin Check : Display & Filter Fields

<b>Display Name</b>	<b>Data Type</b>	<b>Field Transform</b>	<b>Source</b>
Checkin Scan Date/Time	timestamp	Raw Data	Circulation
Check In Date/Time	timestamp	Date	Circulation
Item Barcode	text	Raw Data	Circulation :: Circulating Item
Patron Barcode	text	Raw Data	Circulation -> ILS User :: Current Library Card

<b>Filter Field</b>	<b>Field Transform</b>	<b>Operator</b>	<b>Source</b>
Checkin Scan Date/Time	Date	Equals	Circulation

# Checkin Check: Output

	A	B	C	D
1	Checkin Scan Date/Time	Check In Date/Time	Item Barcode	Patron Barcode
2	2016-04-07 15:11:45.909161-04	2016-04-07	33859001537372	23859000312944
3	2016-04-07 15:11:47.931546-04	2016-04-07	33859001537257	23859000312944
4	2016-04-07 15:11:53.966805-04	2016-04-07	33859001538628	23859000312944
5	2016-04-07 15:11:57.224324-04	2016-04-07	33859001540129	23859000312944
6	2016-04-07 15:12:04.616953-04	2016-04-06	33859001541093	23859000312944
7	2016-04-07 15:12:06.692386-04	2016-04-06	33859001541515	23859000312944
8	2016-04-07 15:12:09.690315-04	2016-04-06	33859001530039	23859000312944
9	2016-04-07 15:12:12.202078-04	2016-04-06	33859001539576	23859000312944
10				

# Report: Hopeless Holds

- To generate a list of holds on bibliographic records that no longer have any viable copies, built using two Evergreen reports combined in MS Excel with the VLOOKUP function.
- Multi-type holds are ignored since they may be filled by items in more than one bibliographic record.
- Holds that can be transferred to other bibliographic records with viable copies will be filled.
- Patrons with holds that remain unfillable will be notified.

# Hopeless Holds - Report 1: Display Fields

- Source: Hold Request

The screenshot shows a report configuration interface. At the top, there are navigation buttons: 'Go Back', 'Reload', and 'Go Forward'. Below these is the 'Database Source Browser' section, which includes a 'Sources' list with 'Hold Request' selected. To the right of the sources list is a 'Source Specifier' field and a table for defining field mappings. The table has columns for 'Field Name', 'Data Type', 'Field Transform', and 'Output Type'. Below the table is an 'Add Selected Fields' button.

The 'Template Configuration' section includes fields for 'Name' (set to 'Holds after specified date, ignore meta-holds'), 'Description' (set to 'All holds for patrons placed after specified date.'), and 'Documentation URL'. A 'Save' button is located to the right of the 'Documentation URL' field.

The 'Displayed Fields' section is active, showing a table of fields to be displayed in the report. The table has columns for 'Display Name', 'Field Name', 'Data Type', and 'Field Transform'. Below the table are several control buttons: 'Alter Display Header', 'Change Transform', 'Move Up', 'Move Down', 'Remove Selected Field', and 'Change Field Hint'.

On the right side of the interface, there is a 'Source Specifier' field containing a list of source specifications:

- Hold Request
- Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extr...
- Hold Request -> Hold Request Record :: Target Bib Record
- Hold Request :: Hold User
- Hold Request -> ILS User :: Current Library Card
- Hold Request :: Pickup Library

# Hopeless Holds - Report 1: Display Fields

Display Name	Data Type	Field Transform	Source
Last Name	Text	Raw Data	Hold Request :: Hold User
First Name	Text	Raw Data	Hold Request :: Hold User
Barcode	Text	Raw Data	Hold Request -> ILS User :: Current Library Card
TCN	Text	Raw Data	Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extracts
Author	Text	Raw Data	Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extracts
Title	Text	Raw Data	Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extracts
Requested	Timestamp	Date	Hold Request



# Hopeless Holds - Report 1: Filters

- When submitting the report to run, you must select the number of months of holds and the pick-up libraries you wish to include.

The image shows two screenshots of a report configuration interface. The top screenshot displays the 'Base Filters' tab with a table of filter settings. The bottom screenshot displays the 'Aggregate Filters' tab with a single filter setting.

**Base Filters**

Filter Field	Field Name	Field Transform	Operator	Value
Capture Date/Time	capture_time	Raw Data	Is NULL	
Hold Cancel Date/Time	cancel_time	Raw Data	Is NULL	
Request Date/Time	request_time	Months ago	Less than	
Hold Type	hold_type	Raw Data	Not in list	"M"
Is Active?	active	Raw Data	Equals	True
Organizational Unit ID	id	Raw Data	In list	

Buttons: Change Transform, Change Operator, Change value, Remove value, Remove Selected Fields, Change Field Hint

**Aggregate Filters**

Filter Field	Field Name	Field Transform	Operator	Value
Hold ID	id	Count	Greater than or equal to	"1"

Buttons: Change Transform, Change Operator, Change value, Remove value, Remove Selected Fields, Change Field Hint

# Hopeless Holds - Report 1: Base Filters

<b>Filter Field</b>	<b>Field Transform</b>	<b>Operator</b>	<b>Value</b>	<b>Source</b>
Capture Date/Time	Raw Data	Is NULL		Hold Request
Hold Cancel Date/Time	Raw Data	Is NULL		Hold Request
Request Date/Time	Months ago	Less than		Hold Request
Hold Type	Raw Data	Not in list	"M"	Hold Request
Is Active?	Raw Data	Equals	True	Hold Request -> Hold Request Record :: Target Bib Record
Organizational Unit ID	Raw Data	In list		Hold Request :: Pickup Library

# Hopeless Holds - Report 1: Aggregate Filters

<b>Filter Field</b>	<b>Field Transform</b>	<b>Operator</b>	<b>Value</b>	<b>Source</b>
Hold ID	Count	Greater than or equal to	"1"	Hold Request

# Hopeless Holds - Report 2: Display Fields

- Source: Hold/Copy Ratio per Bib

The screenshot shows a software interface for configuring a report. At the top, there are navigation buttons: "Go Back", "Reload", "Go Forward", and "Debug".

**Database Source Browser**

Sources: ▾  
Nullible Source Name: ▾  
    Hold/Copy Ratio per Bib

Source Specifier: Hold/Copy Ratio per Bib

Field Name	Data Type	Field Transform	Output Type
Active Holds	int		
Hold/Copy Ratio	float		
Holdable Copy Count	int		
Record ID	id		

Enable nullability selection

**Template Configuration**

Name: Bibliographic records with no viable copies  
Description: Bibliographic records that have no copies usable for filling holds.  
Documentation URL:

Displayed Fields:

Display Name	Data Type	Field Transform
TCN Value	text	Raw Data
Author	text	Raw Data
Title	text	Raw Data
Active Holds	int	Raw Data
Volume owning lib	text	Raw Data

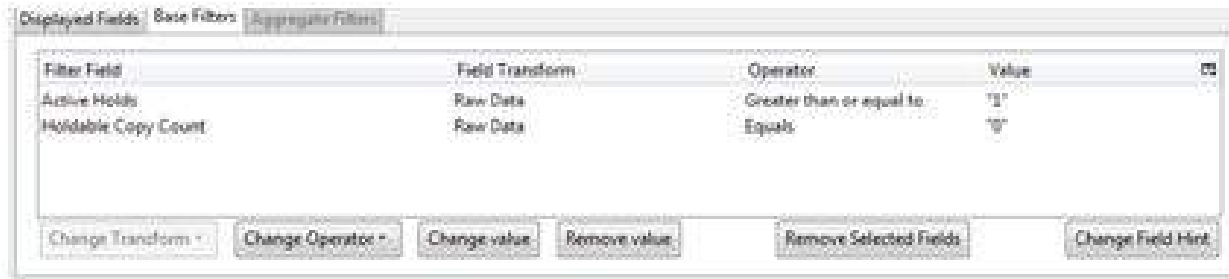
Source Specifier: ▾  
Hold/Copy Ratio per Bib:  
Hold/Copy Ratio per Bib -> Bibliographic Record -> Call Num...  
Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Rec...

# Hopeless Holds - Report 2: Display Fields

<b>Display Name</b>	<b>Data Type</b>	<b>Field Transform</b>	<b>Source</b>
TCN Value	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Record Extracts
Author	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Record Extracts
Title	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Record Extracts
Active Holds	Int	Raw Data	Hold/Copy Ratio per Bib
Volume Owning Lib	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record -> Call Number/Volume :: Owning Library

# Hopeless Holds - Report 2: Filters

- This report only uses base filters



Filter Field	Field Transform	Operator	Value	Source
Active Holds	Raw Data	Greater than or equal to	"1"	Hold/Copy Ratio per Bib
Holdable Copy Count	Raw Data	Equals	"0"	Hold/Copy Ratio per Bib

# Hopeless Holds: Outputs


## Report 1

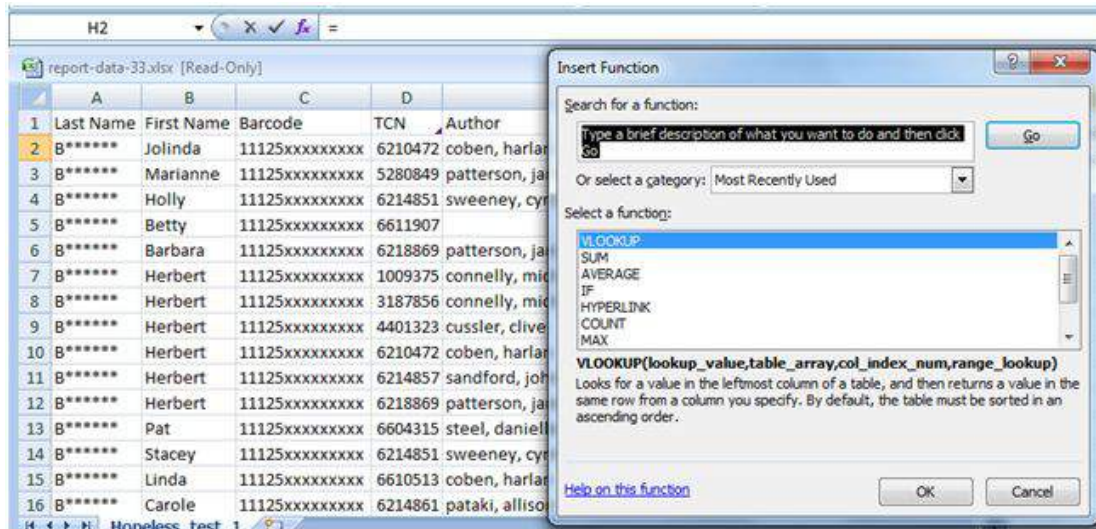
	A	B	C	D	E	F	G
1	Last Name	First Name	Barcode	TCN	Author	Title	Requested
2	B*****	Jolinda	11125xxxxxxxxx	6210472	coben, harlan	fool me once	2016-04-04
3	B*****	Marianne	11125xxxxxxxxx	5280849	patterson, james	private paris	2016-03-22
4	B*****	Holly	11125xxxxxxxxx	6214851	sweeney, cynthia daprix	the nest	2016-04-09
5	B*****	Betty	11125xxxxxxxxx	6611907		concussion	2016-04-01
6	B*****	Barbara	11125xxxxxxxxx	6218869	patterson, james	15th affair	2016-03-18
7	B*****	Herbert	11125xxxxxxxxx	1009375	connelly, michael	the last coyote	2016-03-20

## Report 2

	A	B	C	D	E
1	TCN Value	Author	Title	Active Holds	Volume owning lib
2	1001865	le carre, john	the looking glass war		1 Louisburg - Main Branch
3	1006159	de kunffy, charles	dressage questions answered		1 Louisburg - Main Branch
4	1009557	wurtman, judith j	managing your mind and mood through food		1 Mauney Memorial Library
5	1011868	ea montreal	army of two the 40th day		3 Louisburg - Main Branch
6	1013567	smith, deborah	miracle		1 Louisburg - Main Branch
7	1017650	rodgers, jimmie	recordings 1927 1933		1 West Asheville Library
8	1019606	u2 musical group	achtung baby		1 Swannanoa Library
9	1021202		express italian		1 Watauga County Public Library
10	1021625	davis, nancy	wake up wake up		1 Harnett County Main Library
11	1021625	davis, nancy	wake up wake up		1 Mauney Memorial Library
12	1024999	archer, jeffrey	the sins of the father, no 2 clifton chronicles		1 Watauga County Public Library
13	105149	wiesel, elie	night		1 Cleveland County Main Library

# Hopeless Holds - Combining Reports via VLOOKUP

- Open both files in Excel.
- In Report 1, place the cursor in cell H1 (the first empty cell on a data line) and click on the  Function icon, then select VLOOKUP



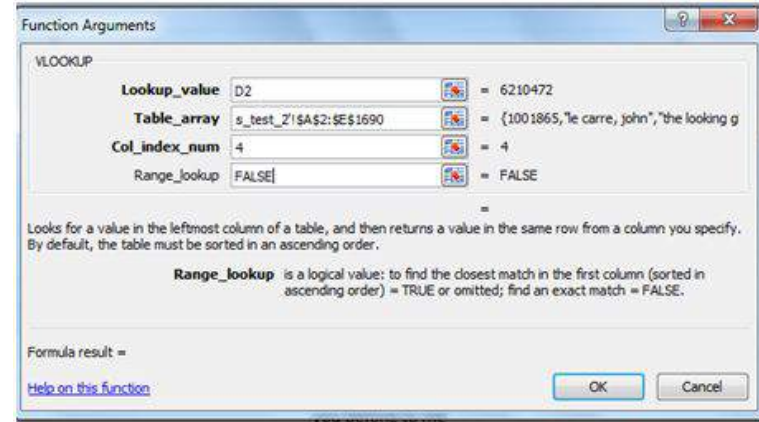
The screenshot shows an Excel spreadsheet with a table of data. The table has columns for Last Name, First Name, Barcode, TCN, and Author. The data rows are numbered 1 through 16. The 'Insert Function' dialog box is open, showing a search for a function. The 'VLOOKUP' function is selected in the list. The dialog box also provides a brief description of the VLOOKUP function: 'Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.'

	A	B	C	D	
1	Last Name	First Name	Barcode	TCN	Author
2	B*****	Jolinda	11125xxxxxxxxx	6210472	coben, harla
3	B*****	Marianne	11125xxxxxxxxx	5280849	patterson, ja
4	B*****	Holly	11125xxxxxxxxx	6214851	sweeney, cyr
5	B*****	Betty	11125xxxxxxxxx	6611907	
6	B*****	Barbara	11125xxxxxxxxx	6218869	patterson, ja
7	B*****	Herbert	11125xxxxxxxxx	1009375	connelly, mi
8	B*****	Herbert	11125xxxxxxxxx	3187856	connelly, mi
9	B*****	Herbert	11125xxxxxxxxx	4401323	cussler, clive
10	B*****	Herbert	11125xxxxxxxxx	6210472	coben, harla
11	B*****	Herbert	11125xxxxxxxxx	6214857	sandford, joh
12	B*****	Herbert	11125xxxxxxxxx	6218869	patterson, ja
13	B*****	Pat	11125xxxxxxxxx	6604315	steel, daniel
14	B*****	Stacey	11125xxxxxxxxx	6214851	sweeney, cyr
15	B*****	Linda	11125xxxxxxxxx	6610513	coben, harla
16	B*****	Carole	11125xxxxxxxxx	6214861	pataki, alliso



# Hopeless Holds - Combining Reports via VLOOKUP

- In the VLOOKUP Function Arguments box, enter **D2** in the “Lookup\_value” field to select the first TCN value in Report 1.
- Place the cursor in the “Table\_array” field of the Function Arguments box, then go to Report 2 and select all data cells; do not select the headers.
- Return to the Function Arguments box and enter **4** in the “Col\_index\_num” field to select the “Active Holds” column of Report 2.
- Enter **FALSE** in the “Range\_lookup” field and click on OK.



# Hopeless Holds - Combining Reports via VLOOKUP

- Copy the VLOOKUP function to all cells in column H of Report 1 using Fill-Down (Ctrl-d) or other method of your choice and sort the entire report on column H.
- Delete all rows with “#N/A” in column H.

	A	B	C	D	E	F	G	H
1	Last Name	First Name	Barcode	TCN	Author	Title	Requested	
2	B*****	Ronald	11125xxxxxxxxx	6060377	ehрман, professor bart d	the historical jesus,	2016-04-10	1
3	B*****	Jeffrey	11125xxxxxxxxx	6419100		25 unforgettable songs	2016-04-11	1
4	D*****	Steven	11125xxxxxxxxx	3646328	dickey, eric jerome	milk in my coffee	2016-04-04	1
5	G*****	Maria	11125xxxxxxxxx	3106635		charlies angels	2016-04-11	1
6	K*****	Daniel	11125xxxxxxxxx	5104931	pink	im not dead	2016-04-08	1
7	B*****	Jolinda	11125xxxxxxxxx	6210472	coben, harlan	fool me once	2016-04-04	#N/A
8	B*****	Marianne	11125xxxxxxxxx	5280849	patterson, james	private paris	2016-03-22	#N/A
9	B*****	Holly	11125xxxxxxxxx	6214851	sweeney, cynthia daprix	the nest	2016-04-09	#N/A
10	B*****	Betty	11125xxxxxxxxx	6611907		concussion	2016-04-01	#N/A
11	B*****	Barbara	11125xxxxxxxxx	6218869	patterson, james	15th affair	2016-03-18	#N/A
12	B*****	Herbert	11125xxxxxxxxx	1009375	connelly, michael	the last coyote	2016-03-20	#N/A

# Hopeless Holds - Processing the Results

- Search by author and title for other bibliographic records that may have holdable items that would satisfy the patron. Make sure they're the same format!
- Abiding by your system's protocols, merge any bibliographic records that would be considered duplicates. All holds will be combined on the resulting merged record. You may want to re-target the holds.
- If merging is not appropriate but another bib record would do, transfer the hold to that record. You may want to re-target the hold.
- If no viable copies are available in your system, alert the patron using whatever communication method you prefer.

# Hopeless Holds - Sample Notice to Patrons

Dear *patron name*,

The material you have requested, *title* by *author*, is no longer available through Forsyth County Public Library or the NC Cardinal consortium. If you still need this material, please call 703-BOOK (703-2665) or visit the Library location of your choice to learn about other options for obtaining this material. You may ignore this message if you no longer need the material. We apologize for any inconvenience.

Sincerely,

*your name*

# Cataloging: Large Type, Empty Form

- No Form in Fixed Fields may mean no returns using Item Filter in Advanced Search
- Catalogers may overlook existing record if using Search Filters
- Patrons and staff cannot find all available Large Print titles

# Large Type, Empty Form: Display Fields

TCNs matching Large type within MARC 650 tag with empty Form field

- Source: Bibliographic Record

Template Configuration

Name:

Description:

Documentation URL:

Displayed Fields **Base Filters** Aggregate Filters

Display Name	Data Type	Field Transform
TCN Value	text	Raw Data
Title	text	Raw Data
Author	text	Raw Data

Source Specifier:

- Bibliographic Record
- Bibliographic Record :: Simple Record Extracts
- Bibliographic Record :: Flattened MARC Fields
- Bibliographic Record -> Call Number/Volume :: Owning Library
- Bibliographic Record :: Fixed Field Entry

# Large Type, Empty Form: Display Fields

<b>Display Name</b>	<b>Data Type</b>	<b>Field Transform</b>	<b>Source</b>
TCN	Text	Raw Data	Bibliographic Record
Title	Text	Raw Data	Bibliographic Record :: Simple Record Extracts
Author	Text	Raw Data	Bibliographic Record :: Simple Record Extracts

# Large Type, Empty Form: Base Filters

TCNs matching Large type within MARC 650 tag with empty Form field

- Source: Bibliographic Record

Template Configuration

Name: TCNs matching Large Type within MARC 650 tag with empty Form

Description: Displays:TCN, Title, Author; Filters: matching substring "large" in the bib 650 MARC tags with no Form listed in Fixed Fields. Source: Bib Record

Documentation URL:

Save

Displayed Fields Base Filters Aggregate Filters

Filter Field	Field Transform	Operator	Value
Is Deleted?	Raw Data	Equals	False
Tag	Raw Data	Contains Matching substr...	"650"
Normalized Value	Raw Data	Contains Matching substr...	"large"
Organizational Unit ID	Raw Data	In list	
Form	Raw Data	Is NULL or Blank	

Source Specifier:

- Bibliographic Record
- Bibliographic Record :: Simple Record Extracts
- Bibliographic Record :: Flattened MARC Fields
- Bibliographic Record -> Call Number/Volume :: Owning Library
- Bibliographic Record :: Fixed Field Entry



# Large Type, Empty Form: Base Filters

<b>Filter Field</b>	<b>Field Transform</b>	<b>Operator</b>	<b>Value</b>	<b>Source</b>
Is Deleted?	Raw Data	Equals	False	Bibliographic Record
Tag	Raw Data	Contains matching substring (ignore case)	650	Bibliographic Record :: Flattened MARC Fields
Normalized Value	Raw Data	Contains matching substring (ignore case)	large	Bibliographic Record :: Flattened MARC Fields
Organizational Unit ID	Raw Data	In list		Bibliographic Record -> Call Number/Volume :: Owning Library
Form	Raw Data	Is NULL or blank		Bibliographic Record :: Fixed Field Entry

# Large Type, Empty Form: Output

TCN Value	Title	Author
1000025	ghost moon	robards, karen
1001081	the purrfect murder	brown, rita mae
100171	simple courage	delaney, frank
1001848	what the night knows	koontz, dean r
100186	proof positive	margolin, phillip
1002699	where shadows go	price, eugenia
1004031	the bodies left behind	deaver, jeffery
1004875	vanished	robards, karen
1004927	up island	siddons, anne rivers
1005875	the ranch	steel, danielle
1006506	the cat who dropped a bombshell	braun, lilian jackson
1006519	queen of the underworld	godwin, gail
1007039	fleeced	clark, carol higgins
1007048	the kiss	steel, danielle
1007061	true detectives	kellerman, jonathan

# No Form in Fixed Fields

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Ghost moon                      Edition:                      TCN: 1000025  
Author: Robards, Karen.                      Pub Date: 2000                      Database ID: 1000025  
Bib Call #: 813/.54                      Record Owner:

**Options**

Stack subfields    Flat-Text Editor    Fast Item Add        

**MARC Record**

Fixed Fields -- Record type: BKS

Type	a	ELvl		Srce		Audn		Ctrl		Lang	eng
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	nyu
		Cont		GPub		LitF	1	Indx	0		
Desc	a	Ills		Fest	0	DtSt	s	Date1	2000	Date2	

Biblioc

## “Large type” in 650 field

MARC Record		
650	0	#a Children of the rich #v Fiction.
650	0	#a Mothers #x Death #v Fiction.
650	0	#a Single mothers #v Fiction.
650	0	#a Stepfamilies #v Fiction.
651	0	#a Louisiana #v Fiction.
655	7	#a Romantic suspense fiction. #2 gsafd
650	0	#a Domestic fiction.
650	4	#a Mother daughters, Louisiana, romantic suspense.
655	7	#a Romantic suspense fiction.
650	0	#a Large type books.
655	7	#a Romantic suspense novels.
650	0	#a Children of the rich #x Fiction.
650	0	#a Mothers #x Death #x Fiction.
650	0	#a Single mothers #x Fiction.
650	0	#a Stepfamilies #x Fiction.
651	0	#a Louisiana #x Fiction.
650		#a Large type books.
655	7	#a Romantic suspense novels. #2 gsafd

# Advanced Search: Large print

Advanced Search   Numeric Search   Expert Search

### Search Input

	Keyword	Contains		X
And	Title	Contains	ghost moon	X
And	Author	Contains	robards	X

[Add Search Row](#)

**Search**   **Clear Form**

### Search Filters

Item Type	Item Form	Language
Audiobook	Braille	Chinese
Book	Direct electronic	English
Music	Electronic	French
Video	<b>Large print</b>	German

# Result: different TCN with Form “d” in Fixed Field

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Ghost moon  
Author: Robards, Karen.  
Bib Call #: 813/.54

Edition:  
Pub Date: 2000

TCN: 311252  
Database ID: 311252  
Record Owner:

Record 2 of 2   [Start](#)   [Previous](#)   [Next](#)   [End](#)   [Search Results](#)

Options

Stack subfields    Flat-Text Editor    Fast Item Add   [Validate](#)   [Save Record](#)   [Help](#)

MARC Record

Fixed Fields -- Record type: BKS

Type	a	ELvl		Srce		Audn		Ctrl		Lang	eng
BLvl	m	Form d		Conf	0	Biog		MRec		Ctry	meu
		Cont		GPub		LitF	1	Indx	0		
Desc	a	Ills		Fest	0	DtSt	r	Date1	2000	Date2	2000

Bibliographic source

[Update source](#)

# Centralized Report Templates

-  Centralized Report Templates (CARDINAL)
  -  Billing/Payment Templates (CARDINAL)
  -  Cataloging Templates (CARDINAL)
  -  Circulation Templates (CARDINAL)
  -  Do NOT use
  -  Hold & Transit Templates (CARDINAL)
  -  Item Templates (CARDINAL)
  -  Patron Templates (CARDINAL)
  -  Weeding Templates (CARDINAL)

# Centralized Report Templates

Cataloging Templates: created by admin					
Create a new report from selected template <input type="button" value="Submit"/>					
Limit output to <input type="text" value="10"/>		<a href="#">Create a new Template for this folder</a>			
Select <a href="#">All</a> <a href="#">None</a>	name	description	docs	create_time	owner
<input type="checkbox"/>	Items lingering in process	Lists items still in process after selected period of time. Display: create date, item barcode, copy status, circ mod, call number, and TCN. Filter: own lib, circ mod, copy status=inprocess, isdeleted=false, and create date>x.		2016-03-16 16:09	<a href="#">admin</a>
<input type="checkbox"/>	List Items Deleted while Checked Out	Finds items deleted while still checked out to patrons (not recommended). Displays last edit date, last editing user, item barcode, due date, patron barcode & name. Filters on owning library and is deleted=true.		2016-03-16 13:34	<a href="#">admin</a>
<input type="checkbox"/>	List Items with No Circulation Type	Displays Branch, Call Number, Barcode, and Title. Filters on Active Copy=true, Circulation Type=null or blank, is deleted=false, Shelving Location, and Owning Library		2016-01-06 11:05	<a href="#">admin</a>
<input type="checkbox"/>	Shelf & Circ Mod mismatch	Displays barcode, call number, owning branch, circ mod and shelving location. Filters on owning library, Circ mod (in list), shelving location (not in list) and is deleted=false. (Can be used to determine if items with a particular circ mod need to have shelving location changed.)		2015-09-09 09:59	<a href="#">admin</a>
<input type="checkbox"/>	TCNs matching Large type within MARC 650 tag with empty Form	Displays:TCN, Title, Author; Filters: matching substring "large" in the bib 650 MARC tags with no Form listed in Fixed Fields. Source: Bib Record		2016-04-20 12:07	<a href="#">admin</a>
<input type="checkbox"/>	TCNs matching some value within a MARC LDR tag	This report lists TCN, Title, Call Number, Shelving Location, Copy Status fields for all items which match some substring in one of the bib MARC tags. Based upon Bib Record		2012-03-01 14:42	<a href="#">admin</a>
<input type="checkbox"/>	TCNs matching some value within a MARC tag - SUBFIELD LEVEL V3	This report lists TCN, Title, Call Number, Shelving Location, Copy Status fields for all items which match A MARC tag. Based upon Bib Record		2014-10-24 15:52	<a href="#">admin</a>



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