CARL Conversations: March 18ᵗʰ, 2021

Topic: Reports in CARL-X

Question and Answer Session

1. For the Items by Status report, should we always select our own library from the Parameter Set drop-down. Or is there a time when we should select the DEFAULT?

   There shouldn't be a time to select DEFAULT if your library is an option. Whatever you save as your parameters will be saved for the next time you run the report.

2. For the Items by Status report, do you have to choose the current date for the end date? Can't this be changed to meet our needs for the report criteria?

   Yes, you can. Molly initially did it this way, and how it is in the instructions, because she wanted to make sure she caught everything so that she could manually pull what she wanted in Excel. This was also when using this report for weeding was still new and not entirely sure the report was indeed pulling everything she needed. But it seems to work how we expect it to and putting in your appropriate end date is just fine to do.

3. Was a global update done previously for those items with the Shelving Delay status?

   Yes, that was done during migration because the quarantine period was longer, but we've stopped doing that. Staff shouldn't see this status anymore but it's possible some items still have this.

4. How do we set the ratio for the High Demand Holds report (Holds Purchase Alert by Branch report 27)?

   This report shows holds that patrons have with YOUR branch as the Pickup Location. The 'Number of title holds to copies' field has the first number that represents the holds, and the second number represents the number of copies. If you want to find items that have 3 holds for every 1 copy, you will put in 3:1. If you want to see what your patrons have holds on that you don't own; you can put in the ratio 1:0.

5. If I want to see the high demand holds for the entire system, do I just select OWLS from the parameter drop-down for Report 27?

   No, you don't need to click on the OWLS parameter set to see holds for the whole system. You would want to use Report 26 Holds Purchase Alert and just choose your library from the drop-down. This will show holds for the system but with your branch's specific parameters, such as the holds ratio and whether to include the missing items.

6. Is there a way to tell how many holds a branch is receiving? It might help with the branch's collection development.

   Yes, Holds Purchase Alert report 26 can help with this. The ratio is going to tell you how many holds are attributed to that pickup branch. As an example: ALG has a 6:1 ratio where 6 is how many people want to pick it up at their location and 1 is how many items they have. So if they want to buy more copies they can or they can wait. This can absolutely be used for collection development.

7. Can the Most Borrowed Books report 3200 be helpful for seeing what is circulating systemwide and what has a ton of holds on it?

   Yes, for report 3200 you can choose to enter in criteria for each field but know that if you put a number in for each field, it will produce that total amount. Example: if you put 10 in for each field, you'll get a total of 30 results. If you just put in 10 for one of them, you'll only get 10 results. These results are system wide.

8. How can you see historical data on how many holds a certain branch has requested?

   We don't think you can see historical data on holds. OWLS can try to do something on the backend, but it's not something that can be done with the canned reports. If there is something you need in terms of this, please email OWLSnet Help and OWLS will try to get it for you.

9. How do we access the daily, weekly monthly tasks in OWLnet?

   Go to the OWLSnet Homepage, and on the main page is the 'Activities, Notices, Reports, and Statistics' you can click on OR you can go to the circulation page under instructions. These are getting updated as we work through them and add 'CARL' to the end of the report name once they've been updated.

10. Is there a report that gives you a summary of fines paid?

    Yes, you can use the Audit Trail report 55. You will want to choose your date range for when you want to see fines, the terminal name (if you really want Amanda can get this for you), select your branch and the payment code. If needing multiple payment codes, you can ctr+click on all the payment methods you need. OWLS will put together a video of this report seeing as it wouldn't open for viewing for the demo. But this report most likely is one where you would need to locate it through the backend of the C drive. OWLS will put together a video and instructions on how to navigate through the C drive.