Shelflist – Brief, Long, and Spreadsheet Formats

These reports are formatted to work with any RTF program. (Ex: Microsoft Word, Open Office (Free) AppleWorks).   If using TextEdit for the MAC, you may not obtain the best results.

Setting up the report

1. *Click* Schedule New Reports wizard.
2. *Select* the INFOhio tab.
3. *Select* CAT: Shelflist
4. *Click* Setup & Schedule.

Basic Information Tab

1. *Change* the Report name and/or Title if you wish.   It should reflect the content of the report.
2. *Description* is a good place to note any special print setup or margins needed. If you save the report as a template, you will see this screen each time you run it.
3. *Title* appears on each page.
4. *Footer* appears at the bottom of each page (optional)

Search String, Item IDs, Title Selection, Call Number Selection, Item Selection Tabs

These determine which items are **included** in the results.

1. *Select* options as needed – the fewer the better. You do not need to answer questions on every tab. *Always use* gadgets to ensure correct formatting of data entry.
2. *Search String* – this limits results to specific words in a record. Could be used for a bibliography.
3. *Item IDs* – this allows you to select specific items to appear in the report.
4. *Title Selection* – allows you to limit results by creation date, cataloger, cataloging date, publication year, number of holds, shadowed status.
5. *Call Number Selection* – allows you to limit results to a call number range rather than an item group.
   - *Leave* the default Number of copies: >0 in place.
6. *Item Selection* - Be sure to indicate your library unless you want all buildings. Other limiters include item group, status, material type, funding source, last activity date, number of checkouts, grade level, curricular area, and more.

Sorting Criteria Tab

1. *Sort* as desired for brief or long formats.

Output Options Tab – For Brief, Long, or Spreadsheet Formats

This determines what information is **displayed** in the report.

Basic | Search String | Shadow | Title Selection | Call Number Selection | Item Selection | Sorting | Output Options

Report Type
⊙ Brief ○ Long ○ Spreadsheet

Report Type
◉ Brief ○ Long ○ Spreadsheet

Report Format
(1) ○ Plain Text ◉ RTF
○ Portrait ◉ Landscape
◉ Normal ○ Condensed

Brief Options
(2) ○ No Date
○ Bib date created
○ Bib date modified
○ Item date created
○ Activity date
◉ Checkout Date
○ Inventoried
○ Publication Year

Brief Report Type

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

2. Brief only allows you to select a date type. Other information is fixed – barcode, call number, status, title.

Brief format sample (indicates Checkout Date option):

```
Chkd. Out    Barcode        Call Number Status       Title
=================================================================================

00/00/0000   31234567898755  HOL 394.261 AVAILABLE    MERRY CHRISTMAS BABY A CHRISTMAS
12/10/2004   31234567898765  HOL 394.266 CHECKEDOUT    CHRISTMAS FAVORITE LATINO AUTHORS
```

Long or Spreadsheet Report Type

Report Type
○ Brief ◉ Long ○ Spreadsheet

Report Format
(1) ○ Plain Text ◉ RTF
○ Portrait ◉ Landscape
◉ Normal ○ Condensed

1. Long - Report Type Format recommended settings are shown. You may try additional combinations to meet your needs. Spreadsheet – should be Plain Text only.

2. Scroll down and check any options you wish to display in your finished report.

3. Advantage of spreadsheet option is ability to open in Excel and sort data as desired.

4. If selecting spreadsheet, be sure to leave the Spreadsheet delimiter Selection on Tab.

Spreadsheet Delimiter Selection:
○ Comma ◉ Tab ○ Pipe ○ Other: [ ]
(4)

Bibliographic Field Selections:
☐ ISBN ☐ Publisher ☐ Creation Date ☐ Modification Date

Other Field Selections:
(2)

☑ Barcode	☑ Call Number	☑ Status
☑ Title	☐ Item Group	☐ Material Type
☐ Funding Source	☐ Creation Date	☐ Inventory date
☐ Circ Notes	☐ Public Notes	☐ Staff Notes
☐ Last Activity Date	☐ Last Checkout Date	☐ Total Number of Checkouts
☑ Author	☐ Price	☑ Library
☐ Shelf Location	☐ Inhouse Checkouts	☑ Pub. Year
☐ Curricular Area	☐ Grade	☐ Genre
☐ Lexile Data (Report will take longer to create)	☐ Checkouts To Date	
☐ Acc. Reader Data (Report will take longer to create)		
☐ Patron Name/ID (Report will take longer to create)		

Long format sample:

```
====================================================================================
Call Number Title
====================================================================================

001.942 NOB Aliens and UFOs / Marc Tyler Nobleman
            Bar:  30800140003929    Grp:  NONFICTION       Type: BOOK          Lex:  IG 750 Lexile.
            Lex:  IG 750 Lexile.    Auth: Nobleman, Marc T  Lib:  LNES          Year: 2007

004.67 OXLA My first Internet guide / Chris Oxlade
            Bar:  30800020004377    Grp:  NONFICTION       Type: BOOK          Lex:  n/a
            Lex:  n/a               Auth: Oxlade, Chris     Lib:  LNES          Year: 2007
```

Running and saving the report

Brief or Long format

Save as a Template (optional, but helpful if you want to tweak results).

1. *Run* the report.

2. *Click* Finished Reports wizard.

3. *Select* report name and *click* View.

4. *Uncheck* View log.

5. *Uncheck* Format Report.

6. *Click* OK.

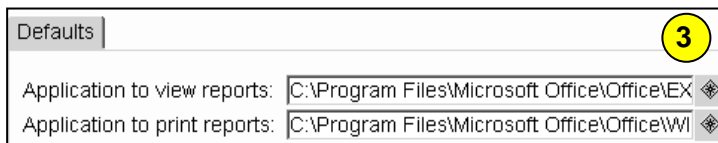   Your report will open in your pre-selected word processing program.

7. *Customize* the report and/or *save* it if you wish.

Finished Reports : View Finished Reports

Report to view: CAT : Shelf List

(4) ☐ View log

(5) ☑ View result

☐ Format report

Spreadsheet format

1. *Run* the report using the spreadsheet option.

2. Under the Reports Wizard, *click* on Report Session.

Defaults	**3**
Application to view reports:	C:\Program Files\Microsoft Office\Office\EX ◈
Application to print reports:	C:\Program Files\Microsoft Office\Office\WI ◈

3. *Use* the gadget to *set* the application to view reports in Excel.

4. *Click* Finished Reports wizard.

5. *Select* report name and *click* Print.

Report to view: CAT : Shelf List
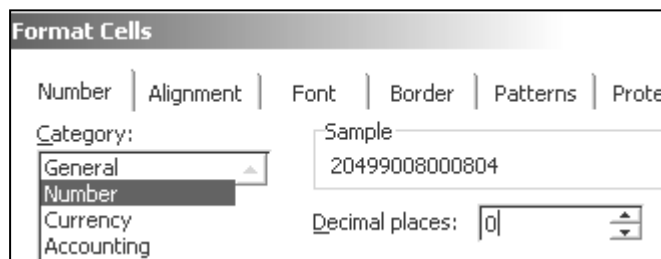☐ View log
☑ View result
☐ Format repo **7**
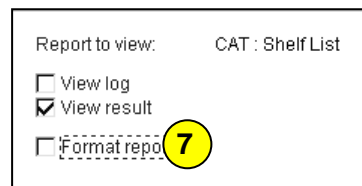
6. *Uncheck* 'View log' and 'Format report' and *click* OK.

7. When you view the report, it will be in Excel and can easily be manipulated. *Customize* the spreadsheet and/or save it if you wish.

HINT: If your barcode column looks like this: 3.0499+13 you'll need to format the cells.
- *Highlight* the barcode column.
- *Click* Format > Cells.
- On the Number Tab, *select* Number
- *Set* the decimal places to 0.

Format Cells

Number	Alignment	Font	Border	Patterns	Protec

Category:
General
Number
Currency
Accounting

Sample
20499008000804

Decimal places: 0

Sample Spreadsheet Format

	A	B	C	D	E	F
1	Item Group	Material Type	Call Number	Status	Title	Barcode
2	BIOGRAPHY	BOOK	92 AAR	CHECKEDOUT	Aaron / by Henry Aaron with Furman Bisher	32617000082761
3	BIOGRAPHY	BOOK	92 AAR	AVAILABLE	Hank Aaron / Jim Tackach ; introduction by Jim Murray ; senior consultant Earl Weaver	32617011000638
4	BIOGRAPHY	BOOK	92 ABB	AVAILABLE	Jim Abbott : All-American pitcher / by Howard Reiser	32617010021551
5	BIOGRAPHY	BOOK	92 ABB	AVAILABLE	Jim Abbott / by Mark Stewart	32617010021569
6	BIOGRAPHY	BOOK	92 ABB	AVAILABLE	Jim Abbott against all odds / Ellen Emerson White	32617010021577
7	BIOGRAPHY	BOOK	92 ABD	AVAILABLE	Giant steps / Kareem Abdul-Jabbar and Peter Knobler	32617000082787
8	BIOGRAPHY	BOOK	92 ABD	AVAILABLE	From Lew Alcindor to Kareem Abdul-Jabbar / James Haskins	32617010021585
9	BIOGRAPHY	BOOK	92 ADA	AVAILABLE	The education of Henry Adams / [Henry Adams]	32617000082795

Suggested report selections:

List of items for a specific library, cataloged on a specific date, by a specific librarian	Title tab: ***Date modified / Modified by*** Item tab: ***Library / Date created***
List of items for any library, cataloged on a specific date, by a specific librarian	Title tab: ***Date modified / Modified by*** Item tab: ***Date created***
List of items for a specific library, cataloged within a specific date range, by a specific librarian	Title tab: ***Date modified / Modified by*** Item tab: ***Library / Date created (range)***
List of items NEVER checked out	Item tab: ***Library/Date last checked out***
List of OLD science items in library	Title tab: ***Publication year (set range)*** Call Number tab: ***Call Number range*** Item tab: ***Library / Item group*** Output options: ***Publication year date***
List of textbooks by curricular area and grade, with status	Item tab: ***Library / Item group / Curricular area / Grade*** Output options: Status