



BACK TO BASICS:

*GETTING THE MOST OUT OF ORDER
RECORDS AND FUND CODES*

Rhonda Glazier

WHICH CATEGORY DO YOU FALL IN TO?

- ❖ Set up order records & funds during migration – and haven't touched them since!
- ❖ Set up order records & funds at time of migration – and have made small "tweaks" over the years.
- ❖ Acquisitions was already set up when I got to the library – and I have no idea how or why.

WHY CHANGE THINGS NOW?

SOME THINGS TO CONSIDER!

- Defining fixed length and variable length fields allows for more accurate reporting.
- Fund codes and fund reports work in conjunction with order records.
- Libraries change all the time – what worked when you first got the system, may not work now.
- Be sure and determine what information you want from your system before changing anything.
- Only change what you need to – don't make unnecessary changes.

REVIEW YOUR TEMPLATES

- Don't forget to review your templates when reviewing settings.
- Templates are a handy way to bring in fixed-field codes based on order type – serials, monograph, eBook, etc....
- May need more than one template to handle every type of order.
- You can always insert special fields into a template at the time of order creation.
 - If you are always adding a field during ordering – consider adding it to your template.

OTHER THINGS TO CONSIDER!

- When you change a definition of a field, you no longer have consistent data.
 - For example, if you changed ACQ TYPE from P for Purchase Order to P for prepaid, older order records will be redefined as prepaid instead of purchase order.
- Be sure and make the changes at a logical time.
 - Right after fiscal close or at the end of the calendar year for example.
- Run any reports you think you will need before you make the changes.
- Remember – change isn't bad, you just need to plan for it!



ORDER RECORDS



#IUG2022

SAMPLE ORDER RECORD

Summary

Recordo11448696

Selection ...o11448696

Paymentso11448696

Bib-Level Holds0

Record

☐ Queue P.O.

View Finances

o11448696

Last Updated: 08-19-2021

Created: 08-10-2021

Revisions: 2

ACQ TYPEp PURCHASE

E PRICE\$19.95

RLOCa ACQUISITIONS

LOCATIONmainc Main Collection - 3rd Floor

FORMb BOOK

BLOCa ACQUISITIONS

CDATE- -

FUNDenglb English Books

STATUSa FULLY PAID

CLAIM- ---

ODATE08-10-2021

TLOC- ---

COPIES1

ORD NOTE- ---

VENDORgulls GULL'S NEST BOOKS

CODE1b BOOKS

ORD TYPEf FIRM ORDER

LANGeng English

CODE2- ---

RACTION- ---

COUNTRY

CODE3- ---

RDATE08-19-2021

VOLUMES1

CODE4I CONT PRO/DIS L

SELECTORle

PAID	DATE	INVD	INV#	AMT	VOUCHER	COPIES	FOR CURR	NOTE
	08-19-2021	08-13-2021	60533	\$14.56	31230	001		

SETTING UP ORDER RECORDS – Fixed Length Fields

- Data Entered by Library
 - 001 ACQ TYPE
 - 019 BLOC (Billing Location)
 - 003 CDATE (Cataloging Date)
 - 004 CLAIM*
 - CODE1, CODE2, CODE3, CODE4
 - *Locally Defined*
 - 100 COUNTRY*
 - 011 FORM
- 012 FUND
- 023 LANG (Language)*
- 002 LOCATION
- 014 ORD NOTE*
- 015 ORD TYPE (Order Type)
- 016 RACTION (Receiving Action)
- 018 RLOC (Receiving Location)
- 021 TLOC (Transit Location)
- 022 VENDOR
- 106 VOLUMES

**System defined, organization can augment*

001 ACQ TYPE

Library defined. Use for acquisition type or method of paying for the material

- Maximum code length: 1 character (lower case alphabetic or numeric)
- Maximum number of codes: 32
- Maximum length of code: 25 characters

Sample acquisition types:

- P purchase
- X exchange
- D prepaid
- G gift
- F firm order



002 LOCATION

Shelving location or branch, defined by library

- Maximum number of codes: 10,000 (lower case alphabetic or numeric)
- Maximum code length: 5
- Maximum length of code definition: 25 characters
- Maximum number of locations in an order record: 100



Sample Location Codes

- Main Main Library
- Ref Reference
- YA Young Adult
- BUS Business Library

011 FORM

The physical form of the material. Your library defines the codes.

- Maximum code length: 1 (lowercase alphabetic or numeric)
- Maximum number of codes: 32
- Maximum length of code definitions: 25 characters

Sample Forms

- B book
- P periodical
- S series
- D DVD
- E eBook



015 ORDTYPE

E PRICE	\$19.95
FORM	b BOOK
FUND	englb English Books
ODATE	08-10-2021
ORD NOTE	- ---
ORD TYPE	f FIRM ORD
RACTION	- ---
RDATE	08-19-2021

Select

APPROVAL PLAN
a

BLANKET ORDER
b

COMES WITH
c

DEPOSIT ACCT
d

E-resource
e

FIRM ORDER
f

GIFT
g

ITEM S.O.
i

MEMBERSHIP
m

PACKAGE PLAN
p

STAND ORDER
o

SUBSCRIPTION
s

OK

Cancel

Data in Field entered by Library

Defines the way the material is acquired.

- Code: 1 character (lowercase alphabetic or numeric)
- Maximum #: 32
- Maximum Length: 25 characters



ORDTYPE can be mapped to the sub fund field in the fund code.

016 REACTION

Library defined: receiving action usually indicating special handling, can be used in conjunction with the variable length field INT NOTE.

- Maximum code length: 1 character (lowercase alphabetic or numeric)
- Maximum number of codes: 32
- Maximum length of code definition: 25 characters

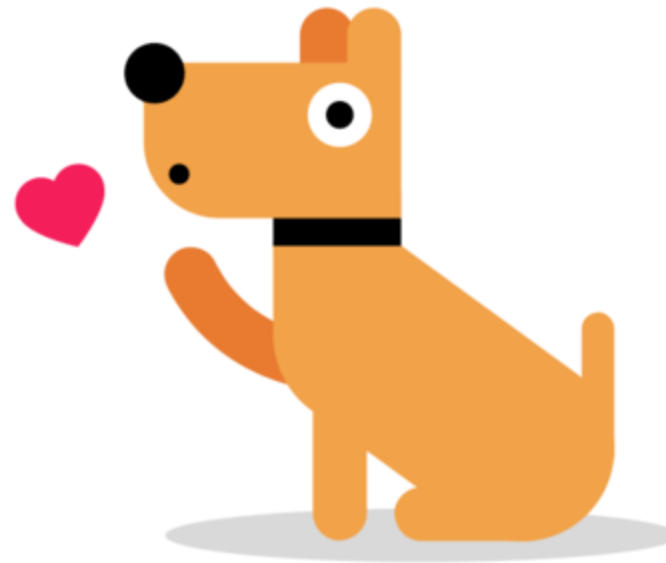
Sample REACTION definitions:

- - NO REACTION (default)
- A Attention
- N Notify
- R Rush



SETTING UP ORDER RECORDS – Fixed Length Fields

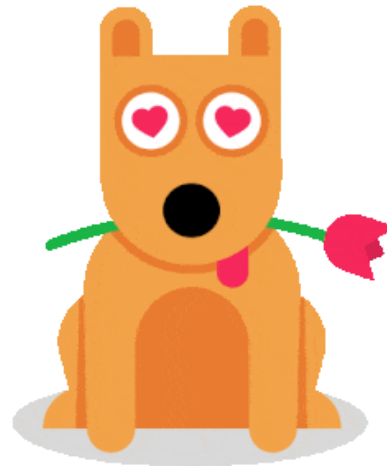
- Data entered by system
 - 005 Copies
 - 010 E_Price
 - 013 ODATE
 - 017 RDATE
 - 020 STATUS



005 COPIES

- The number of copies ordered – affects the \$ amount that will be encumbered

- Maximum number of copies:
- 1,000 for bibliographic records
 - 255 for check-in records
 - 1,000 for order records



010 E_PRICE

Estimated price for one copy of the ordered item. This amount is used for encumbering purposes.



If the estimated price is in a foreign currency, as you enter the new order you can have the system convert it so that the E-PRICE Will be in your currency. (See the variable length field FOR_CURR

\$ \$ \$

Maximum dollar amount: \$1,000,000.00!

013 – ODATE

- The date the material was ordered.



Month-day-year (mm-dd-yy OR mm-dd-yyyy) or day-month-year (dd-mm-yy or dd-mm-yyyy)

For example: 07-16-22 or 16-7-2022



017 - RDATE

- The date of receipt. The date in this field indicates when, and if, an order has been COMPLETELY received.
 - If there is neither an RDATE nor an ODATE, the item will be selected for claiming.

Month-day-year (mm-dd-yy OR mm-dd-yyyy) or day-month-year (dd-mm-yy or dd-mm-yyyy)

For example: 07-16-22 or 16-7-2022



RDATE can affect the display of order records in the Web PAC

020 STATUS

REVIEW OF CODES

CODE	DEFINITION
o	On order – encumbered monograph
a	Fully paid – fully disencumbered monograph
q	Partially paid – partially disencumbered monograph
z	Cancelled – fully disencumbered
1	On hold – not yet encumbered
2	Approval rejection – not encumbered
c	Serial on order – encumbered new serial
d	Serial paid – fully paid and disencumbered serial
e	Serial partially paid – partially paid, partially disencumbered serial
f	Serial – no encumbering, but can make payments for continuation orders
g	Serial – encumbered (re-encumber fund for renewal)

SETTING UP ORDER RECORDS – Variable Length Fields

- Date Entered by Library
 - BLANKET PO
 - IDENTITY
 - INT NOTE (Internal Note)*
 - MESSAGE
 - NOTE
 - OLDORD# (Old Order Record #)*
 - PO INFO*
 - REQUESTOR
- SELECTOR
- SHIP TO
- TICKLER
- VEN ADDR (Vendor Address)
- VEN TITLE# (Vendor Title No.)
- VEN NOTE (Vendor Note)

**Indicates that this field
can be used by both the
system & organization*

SETTING UP ORDER RECORDS – Variable Length Fields

- Data Defined by System

- EBOOK ID
 - ERM LINK
 - FOR CURR
 - FUNDS
 - LISTPRICE
 - LOCATIONS
 - ORD STATUS
 - ORDER INFO
- PAID
 - REC COPIES
 - REOPEN DAT
 - TICKLERLOG



EBOOK ID

- E-book identification number used during EDIFACT ordering to distinguish between items which have the same ISBN, but are from different suppliers.



The system only uses this field if your library has enabled the E-book identification feature.



Maximum 10,000 characters; however only the first 18 characters are included in the outgoing EDIFACT order.

FOR CURR

- Optional feature allows entering orders or invoices in a foreign currency.
- Linked to the fixed-length field EPRICE.
- Used when you receive and enter invoices in other currencies.



Do not edit this field directly; it is changed as invoices and orders in foreign currencies are entered.



FUNDS

- If there are multiple copies being encumbered and paid from multiple funds for an order, and the code in the fixed-length field FUND in the order record is MULTI, funds displays those funds and the number of copies (if there is more than one) from each.
- If there is ONE COPY being encumbered and paid from multiple funds, and the code in the fixed-length field FUND in the ORDER record is MULTI, FUNDS displays those fund codes and the percentage of the EPRICE that will be encumbered to each fund.



This field cannot be edited; changes are made by editing the FUND field (or the LOCATIONS field if both LOCATION and FUND are multi).



LIST PRICE



- This option must be enabled.

Once you have it enabled, the system offers the "Are you going to be keying list prices? Setting on the INVOICE tab. By selecting this setting, you can enter the list prices during invoice processing and view list prices in EDIFACT invoices.

LOCATIONS

Appears if fixed-length field LOCATION is **MULTI**. If multiple copies are being sent to multiple branches or locations, and the fixed-length field LOCATION is therefore MULTI, the variable-length LOCATIONS field is created and displays the locations and number of copies.



- This field cannot be edited; it can be changed by editing the fixed-length field LOCATION.

FUND CODES



#IUG2022

FIELDS YOU MAY NOT BE USING IN YOUR FUND CODES

- Discount %
- Code 1 – 3 Library Defined
- Note 1 & 2
- Subfunds 1 - 7



Discount %

- Percentage by which you want the system to discount the E_PRICE (when computing the encumbrance), of all items purchased using this fun.
- FOR EXAMPLE: childb – Children's book fund
 - If the vendor gives you an automatic 30% discount on all children's books, you can enter that discount amount here – and have the system calculate the discount for you.



This percentage will impact your encumbrance amount, not the paid amount.

CODE 1 - 3

- Library defines the use of these fields
 - Cannot use in create list
 - Only shown in the fund code view
 - Only 1 character code displays

HELP!!! I don't have any examples of how you would use code 1 - 3. If you do – please let me know!!!



NOTE 1 & 2

Free-text note fields. These notes display in the Reports tab in the Funds function.

Each note can have up to 25 characters each.

Notes are entered directly into the fund code record.

Some examples:

English books

Do Not Use

Single titles only

Notify selector



Notes should pertain to all orders attached to that fund.

FUND CODE RECORD

Fund

Pie Chart

Bar Chart

Activity

Report

Funds

Fund English Books (englb)

CODE	englb	SUBFUND3	\$0.00	CODE 1	-
WARNING PERCENTAGE	0	SUBFUND4	\$0.00	CODE 2	-
APPROPRIATION	\$10,806.00	SUBFUND5	\$4,941.57	CODE 3	-
EXPENDITURE	\$10,387.59	SUBFUND6	\$0.00	#ORDERS YTD	235
ENCUMBRANCE	\$227.86	SUBFUND7	\$0.00	#PAYMENTS YTD	228
SUBFUND1	\$5,446.02	EXTERNAL FUND	0	DISCOUNT %	0
SUBFUND2	\$0.00				

NOTE 1

Single title books

FUND NAME

English Books



*Use note 1 & 2 by inserting a note field

Library defined

REPORT ON SINGLE FUND

Fund	Report	
Pie Chart	FINANCIAL STATUS	
Bar Chart	FUND NAME	English Books
	CODE	englb
Activity	NOTE 1	Single title books
Report	APPROPRIATION	\$10,806.00
	EXPENDITURE	\$10,387.59
	ENCUMBRANCE	\$227.86
	Free Balance	\$190.55

Expenditure by Subfund					
BOOKS	\$5,446.02	52%	NON-BOOK	\$0.00	0%
PERIODICALS	\$0.00	0%	STO'S	\$0.00	0%
ELECTRONIC	\$4,941.57	47%	MEMBERSHIPS	\$0.00	0%
OTHER	\$0.00	0%			
External fund# 0 Codes 1,2,3: "-", "-", "-"					

ACTIVITY ON A SINGLE FUND

Fund	Activity						
Pie Chart							
Bar Chart							
Activity							
Report							

musb Music Books FUND ACTIVITY REPORT						
			Appropriation	Expenditure	Encumbrance	
PREVIOUS BALANCE:			\$6,381.32	\$7,000.00	\$545.69	\$72.99
22980	apphist	FY17 Appropriation		\$2,500.00		
24940	apphist	FY18 appropriation		\$2,500.00		
26721	apphist	FY19 Appropriation	sjkc	\$2,500.00		
28852	apphist	FY20 Budget	sjkc	\$3,000.00		
30330	apphist	FY21 Appropriation	sjkc	\$2,392.00		
31231	apphist	FY22 Appropriation	sjkc	\$7,000.00		
CURRENT ACTIVITY						
	PONUM	TITLE	LOGIN			
31835	11466091	Melodic rhythms for guitar / William Lea	sjkc	\$16.99		-\$16.99
140218	11468683	Introduction to the music industry : an	sjkc			\$62.95
31889	11468683	Introduction to the music industry : an	sjkc	\$62.95		-\$62.95
140468	11471189	Self-portrait of a jazz artist : musical	sjkc			\$25.95
140469	11471190	Exploring jazz guitar / Jim Hall.	sjkc			\$19.99
			-----	-----		
SUBTOTAL					\$79.94	\$28.95
			-----	-----		
CURRENT BALANCE:			\$6,272.43	\$7,000.00	\$625.63	\$101.94
3 new encumbrances listed above total \$108.89 and average\$36.29						
2 payments listed above, average \$39.97						
9 payments made year-to-date average \$69.51						
Expenditures by subfunds						
BOOKS	\$625.63	100%	NON-BOOK	\$0.00	0%	
PERIODICALS	\$0.00	0%	STO'S	\$0.00	0%	
ELECTRONIC	\$0.00	0%	MEMBERSHIPS	\$0.00	0%	
OTHER	\$0.00	0%				

ORDER RECORDS/FUND CODES WORKING TOGETHER



#IUG2022

CODE1, CODE2, CODE3, CODE4

- Library defined. Library determines the name and purpose of these fields, their codes, and the codes' definitions.
 - Maximum code length: 1 (lowercase alphabetic or numeric)
 - Maximum number of codes: 32 for each field
 - Maximum length of code definitions: 25 characters



HOW THEY WORK WITH FUND CODES

Use one of the following:

CODE1	b BOOKS
CODE2	- - -
CODE3	- - -
CODE4	I CONT PRO/DIS L

Code4: contribute to Prospector/display in catalog

Advantage:

- Library can determine values
- Can be linked to sub funds

Disadvantage:

- Only one code field can be linked to one sub fund.

CODES CAN BE MAPPED TO SUB FUNDS

Select ✕

BOOKS	b
ELECTRONIC	e
MEMBERSHIPS	m
NON-BOOK	n
OTHER	o
PERIODICALS	p
STO'S	s

OK Cancel

Map codes to sub fund 1 – 7 in the fund record



Lumps the sum of the first sub fund and all sub funds above seven together



ORDTYPE can also be mapped to sub funds. Contact Innovative about options.

WHERE IT SHOWS UP IN THE FUNDS

Summary

Record **o11448696**

Receive **o11448696**

Selection ... **o11448696**

Payments **o11448696**

Bib-Level Holds **0**

Record

o11448696

Last Updated: 08-19-2021

Created: 08-10-2021

Revisions: 2

ACQ TYPE

p PURCHASE

E PRICE

\$19.95

LOCATION

mainc Main Collection - 3rd Floor

FORM

b BOOK

CDATE

- -

FUND

englb English Books

CLAIM

- ---

ODATE

08-10-2021

COPIES

1

ORD NOTE

- ---

CODE1

b BOOKS

ORD TYPE

f FIRM ORDER

CODE2

- ---

CODE3

- ---

CODE4

I CONT PRO/DIS L

SELECTOR

le

PAID

DATE	INVD	INV#	AMT	VOUCHE
08-19-2021	08-13-2021	60533	\$14.56	31230

Queue P.O.

Fund

Pie Chart

Bar Chart

Activity

Report

Funds

Fund English Books (englb)

CODE	englb	SUBFUND3
WARNING PERCENTAGE	0	SUBFUND4
APPROPRIATION	\$10,806.00	SUBFUND5
EXPENDITURE	\$10,387.59	SUBFUND6
ENCUMBRANCE	\$227.86	SUBFUND7
SUBFUND1	\$5,446.02	EXTERNAL FUND
SUBFUND2	\$0.00	0

FUND NAME English Books

FUND REPORT

Funds			
<div><div>Funds</div><div><div>Current Funds (209)</div><div>Hierarchies</div><div>Book Accounts</div><div>Serials Accounts</div><div>Microforms Acco</div><div>ICR (F&A) Accou</div><div>Extended Studie</div><div>Moore Humanitie</div><div>Kraemer Main</div><div>Kraemer Related</div><div>Materials Budget</div><div>All Accounts</div><div>electronic</div><div>Rhonda's Funds</div><div>Old Funds (209)</div><div>Old Hierarchies</div></div></div>	Funds		
	Funds		
		Appropriation	Expenditure
	Book Accounts	\$184,735.77	\$99,154.60
	Serials Accounts	\$90,000.00	\$87,139.54
	Microforms Accounts	\$0.00	\$0.00
	ICR (F&A) Accounts	\$74,017.00	\$92,662.92
	Extended Studies	\$0.00	\$0.00
	Moore Humanities	\$0.00	\$0.00
	Kraemer Main	\$79,708.00	\$70,282.88
	Kraemer Related	\$25,557.00	\$17,167.62
	Materials Budget	\$1,590,529.00	\$1,061,138.01
	All Accounts	\$2,017,443.00	\$1,453,042.62
	electronic	\$0.00	\$0.00
	Rhonda's Funds	\$18,750.00	\$5,796.02

ADD SUB FUND OPTION

Report

☐ Subfund expenditures in 2 groups

Subfund header1 Subfund header2

Pick group1

	Name
<input type="checkbox"/>	BOOKS
<input type="checkbox"/>	NON-BOOK
<input type="checkbox"/>	PERIODICALS

Pick group2

	Name
<input type="checkbox"/>	BOOKS
<input type="checkbox"/>	NON-BOOK
<input type="checkbox"/>	PERIODICALS

☒ Detail report

Report Header

Graemer Family Library 04-17-2019

Number of Levels 1

Start

✓ If you want to run a report using sub funds

Column Heading



You can choose one sub fund, or group of sub funds

FUND REPORT WITH SUB FUNDS

Kraemer Family Library 04-17-2019

Book Accounts : ACCOUNTING REPORT --

Book Accounts	Appropriation	Books	NonBook	Encumbrance	Free Balance	%
Anthropology Books	\$5,200.00	\$2,505.38	\$303.97	\$80.00	\$2,310.65	56%
Art Books	\$7,500.00	\$4,100.17	\$579.00	\$564.90	\$2,255.93	70%
Biology Books	\$10,396.00	\$6,137.84	\$0.00	\$3,025.70	\$1,232.46	88%
Business Books	\$23,500.00	\$22,985.95	\$265.00	\$0.00	\$249.05	99%
Chemistry Books	\$6,000.00	\$4,593.97	\$0.00	\$937.98	\$468.05	92%
Communications Book	\$9,100.00	\$6,746.39	\$195.95	\$2,032.56	\$578.90	106%
Comp Sci Books	\$11,162.00	\$8,118.25	\$0.00	\$830.22	\$2,213.53	80%
Criminal Just Books	\$6,000.00	\$4,002.35	\$0.00	\$175.89	\$1,743.26	71%
Education Books	\$16,700.00	\$11,575.07	\$440.00	\$2,470.73	\$1,897.40	89%

These numbers
represent
expenditures

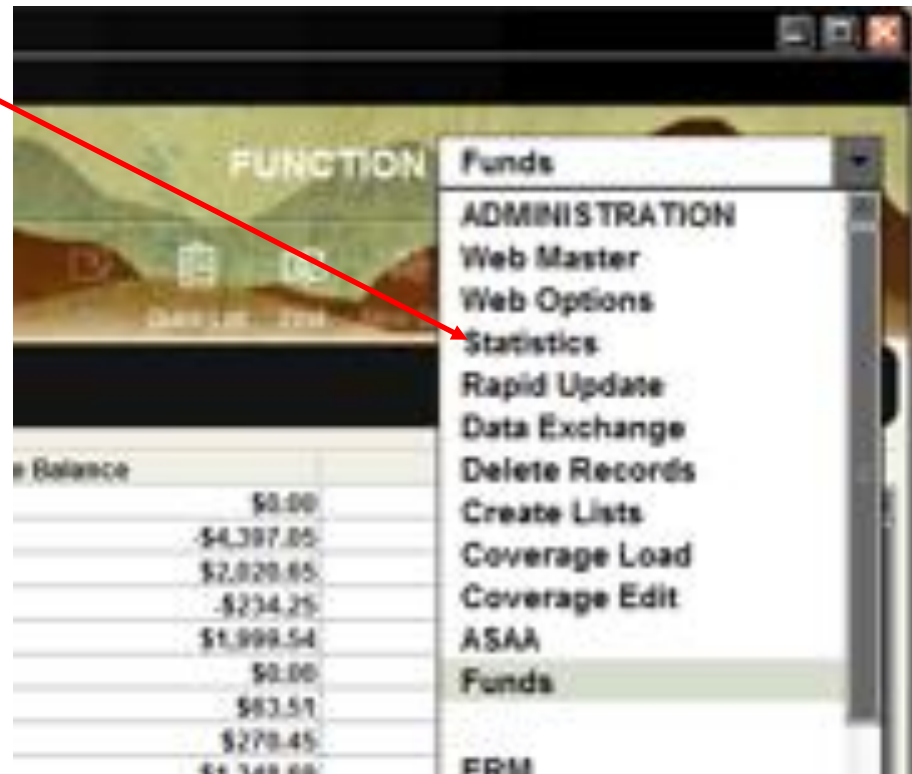
STATISTICAL REPORTS



#IUG2022

CREATE REVIEW FILE

- Determine what you want to gather statistics on:
 - Create review file
- Go to Statistics Option under Administration



USING STATISTICS

You can do a lot in statistics, including creating & saving queries to run later. We are going to create a new query.



If you save a query to run later, it stores the create list file number, not the actual contents.

CREATE QUERY

Choose saved query name, if saving
Add title you want for the results file name

The screenshot shows the 'CREATE QUERY' form. At the top, there are two text input fields: 'Saved Query Name' (containing 'Unnamed') and 'Results File Name' (containing 'Unnamed'). Below these is a 'Review' dropdown menu with a red arrow pointing to the 'Review' option. The 'Review file' dropdown is set to '2. Daily Summon Export (JDT) (116) (BIBLIOGRAPHIC)'. The 'Query Type' section has three radio buttons: 'Field Statistics' (selected), 'Periodic Report', and 'Cross Tab'. There are checkboxes for 'Limit the results by a time range' (checked), 'Fastest accumulation', and a 'Split multi' dropdown set to 'by copies'. The 'Base the orders report on' section has two radio buttons: 'Paid dates' (selected) and 'Invoice dates'. The 'Time Resolution' section has four radio buttons: 'Yearly' (selected), 'Quarterly', 'Monthly', and 'Day Range'. The 'Date Range' section has three radio buttons: 'Last Year vs. the Year Before' (selected), 'Select One Year' (with a year selector set to 2021), and 'Select Two Years' (with year selectors set to 2020 and 2021). The 'Year' section has two radio buttons: 'Use Fiscal Year' (selected) and 'Use Calendar Year'. At the bottom are four buttons: 'Save the Query', 'Save as', 'Schedule the Query', and 'Run the Query!'.

Choose Review for review file

The screenshot shows the 'CREATE QUERY' form. At the top, there are two text input fields: 'Saved Query Name' (containing 'Unnamed') and 'Results File Name' (containing 'Unnamed'). Below these is a 'Review' dropdown menu. The 'Review file' dropdown is set to '2. Daily Summon Export (JDT) (116) (BIBLIOGRAPHIC)'. The 'Report On' dropdown menu has a red arrow pointing to the 'Order' option. The 'Query Type' section has three radio buttons: 'Field Statistics' (selected), 'Periodic Report', and 'Cross Tab'. There are checkboxes for 'Limit the results by a time range' (checked), 'Fastest accumulation', and a 'Split multi' dropdown set to 'by copies'. The 'Base the orders report on' section has two radio buttons: 'Paid dates' (selected) and 'Invoice dates'. The 'Time Resolution' section has four radio buttons: 'Yearly' (selected), 'Quarterly', 'Monthly', and 'Day Range'. The 'Date Range' section has three radio buttons: 'Last Year vs. the Year Before' (selected), 'Select One Year' (with a year selector set to 2021), and 'Select Two Years' (with year selectors set to 2020 and 2021). The 'Year' section has two radio buttons: 'Use Fiscal Year' (selected) and 'Use Calendar Year'. At the bottom are four buttons: 'Save the Query', 'Save as', 'Schedule the Query', and 'Run the Query!'.

Create a report on Order
Leave Query type as Field Statistics

CREATE QUERY

In this example, we are going to compare last year's cost with the year before cost.

Determine if you want to use invoice date or paid date

Choose whether you want to split funds in the report.

Select report breakdown

Select date range

The screenshot shows a web-based form for creating a query. At the top, there are fields for 'Saved Query Name' (FY20 and FY 21 Orders) and 'Results File Name' (FY20 and FY21 Orders). Below these is a 'Review' dropdown and a 'Review file' dropdown (8. FY20 and FY21 Orders (8439) (BIBLIOGRAPHIC)). The 'Report On' dropdown is set to 'Order'. The 'Query Type' section has three radio buttons: 'Field Statistics' (selected), 'Periodic Report', and 'Cross Tab'. There are checkboxes for 'Limit the results by a time range' (checked) and 'Fastest accumulation' (unchecked). A dropdown menu for 'Split multi by copies' is open, showing options: 'Do not split multi', 'Split multi by copies' (highlighted), and 'Split multi by volumes'. The 'Base the orders report on' section has two radio buttons: 'Paid dates' (selected) and 'Invoice dates'. The 'Time Resolution' section has four radio buttons: 'Yearly' (selected), 'Quarterly', 'Monthly', and 'Day Range'. The 'Date Range' section has three radio buttons: 'Last Year vs. the Year Before', 'Select One Year' (with year 2021), and 'Select Two Years' (with years 2020 and 2021). The 'Year' section has two radio buttons: 'Use Fiscal Year' (selected) and 'Use Calendar Year'. At the bottom are four buttons: 'Save the Query', 'Save as', 'Schedule the Query', and 'Run the Query!'.

Saved Query Name: FY20 and FY 21 Orders
Results File Name: FY20 and FY21 Orders

Review Review file: 8. FY20 and FY21 Orders (8439) (BIBLIOGRAPHIC)

Report On: Order

Query Type: ☒ Field Statistics ☐ Periodic Report ☐ Cross Tab

☒ Limit the results by a time range ☐ Fastest accumulation

Split multi by copies:
Do not split multi
Split multi by copies
Split multi by volumes

Base the orders report on: ☒ Paid dates ☐ Invoice dates

Time Resolution: ☒ Yearly ☐ Quarterly ☐ Monthly ☐ Day Range

Date Range: ☐ Last Year vs. the Year Before ☐ Select One Year 2021 ☒ Select Two Years 2020 2021

Year: ☒ Use Fiscal Year ☐ Use Calendar Year

Save the Query Save as Schedule the Query Run the Query!

SPLIT FUNDS IN ORDER STATISTICS

- Do not split multi
 - Counts each record once – no matter how many funds it contains
- Split multi by copies
 - Payment amount is divided by the number of paid copies
 - (if paid amount is \$100 and two copies are purchased, each fund would have \$50 applied)
- Split multi by volumes
 - Payment amount is divided by the number of volumes
 - (if paid amount is \$100 against two funds and each set has 2 volumes; \$25 would be applied to each fund.)

SAMPLE REPORT

Once your report runs, you can determine what data is displayed. I chose to display by fund.

Select Report

ACQ TYPE

LOCATION

CLAIM

CODE1

CODE2

CODE3

CODE4

FORM

FUND

ORD NOTE

ORD TYPE

REACTION

STATUS

TLOC

VENDOR

LANG

COUNTRY

VOLUMES

All Fields

LC call #

Kraemer Family Library

Report for the FY20 and FY21 Orders

Review File: 8. FY20 and FY21 Orders (8439) (BIBLIOGRAPHIC)

8871 records were processed. (0 records had been deleted.)

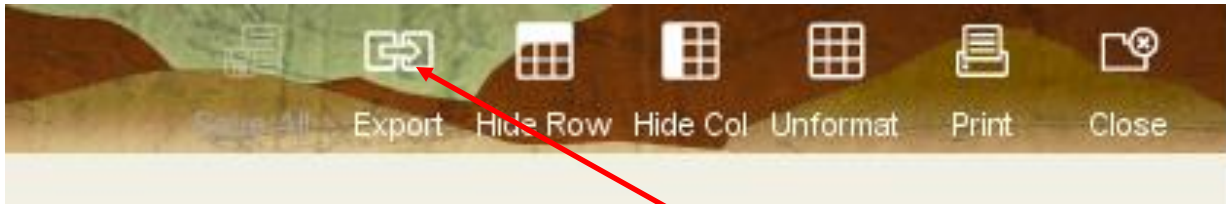
<

Code	Meanin...	Record C...	COPIES	Paid Copi...	Piece Co...	Paid Piec...	# in 2020	\$ in 2020	# in 2021	\$ in 2021	Est. Price...
anth	Anthrop	108	108	95	108	95	79	\$6,744.23	16	\$1,398.89	\$0.00
anth	Anthrop	7	7	12	7	12	6	\$1,383.81	6	\$1,369.88	\$0.00
artb	Art Book	193	193	188	193	188	92	\$7,012.75	96	\$5,908.16	\$0.00
arts	Art Ser	11	11	17	11	17	9	\$1,739.69	8	\$1,716.77	\$0.00
biob	Biology	125	125	66	125	66	43	\$4,374.91	23	\$3,153.14	\$0.00
bios	Biology	5	5	7	5	7	3	\$2,494.47	4	\$2,652.26	\$0.00
bust	Busines	540	541	368	541	368	255	\$19,131.12	113	\$18,911.31	\$0.00
busr	Busines	4	4	0	4	0	0	\$0.00	0	\$0.00	\$0.00
buss	Busines	23	23	23	23	23	11	\$5,252.14	12	\$4,635.90	\$0.00
cher	Chemis	55	55	28	55	28	17	\$3,116.89	11	\$2,861.91	\$0.00
cher	Chemis	2	2	8	2	8	4	\$6,997.61	4	\$7,615.75	\$0.00
chilb	Children	201	201	146	201	146	80	\$1,117.39	66	\$949.56	\$0.00
com	Commu	214	216	141	216	141	92	\$6,681.07	48	\$3,708.73	\$0.00
com	Comp S	135	135	83	135	83	53	\$5,641.25	30	\$2,542.23	\$0.00
com	Comp S	1	1	2	1	2	1	\$603.85	1	\$622.78	\$0.00
com	Commu	1	1	2	1	2	1	\$54.70	1	\$54.70	\$0.00
crjut	Criminal	138	138	112	138	112	53	\$4,419.38	59	\$3,782.71	\$0.00

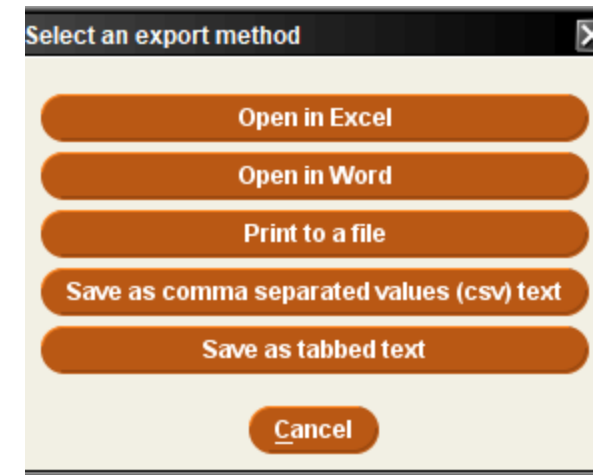
Information on records included in query

REPORT OPTIONS

Handy options:



- Export report
- Get rid or hide a row or column that you don't need
- Print



REPORT OPTIONS

You can also hide rows or columns you don't need.

Select Report

ACQ TYPE

LOCATION

CLAIM

CODE1

CODE2

CODE3

CODE4

FORM

FUND

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ORD TYPE

REACTION

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Kraemer Family Library

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biob	Biology I	125	125	66	125	66	43	\$4,374.91	23	\$3,153.14	\$0.00
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bust	Busines	540	541	368	541	368	255	\$19,131.12	113	\$18,911.31	\$0.00

Hide this row

Hide this column

Unhide all

Right click on column heading and you will get the pop-up window above. If you want to hide a row, highlight the row, right click on the row and chose hide this row.

STATISTIC REPORTS REMINDERS!

- ❖ Understand the limitations of the records you are running statistical reports against.
 - ❖ If you are using this year's order records, don't do a yearly comparison – you don't have the correct data
- ❖ If you track order record numbers by year, you can run a record number range instead of a review file report
- ❖ The effective reports are those that you have defined the fields.
 - ❖ If you aren't using CODE1,COD2, ETC... you can't get meaningful data from this field.
- ❖ Determine which reports you want regularly and clean up the corresponding order record fields so that you can get that information.

THANK YOU!

CONTACT INFORMATION

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QUESTIONS?

