

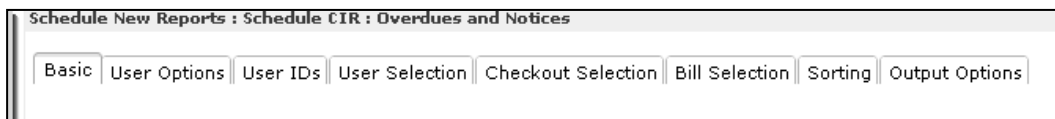
## Overdues and Notices – Brief and Long Formats, Notices, and Spreadsheet Option

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** CIR: Overdues and Notices.
4. **Click** Setup & Schedule.

### Selections / Options




#### 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 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)

Report name: KAHS Overdue Notices  
 Description: Overdue Notices 2 per page  
 Title: Overdue Notice  
 Footer: KAHS

#### User Options, User ID's, User Selection, Checkout Selection, Bill Selection Tabs

1. **User Options** – specific homerooms, programs, or homeschools can be selected. They must be entered exactly as they appear in patron records. You may select Active, Inactive or Both for Students.
2. **User Ids** – You can enter specific ID numbers to run for select patrons.
3. **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported. Leave a check in the box for: blank field matches with Not Equal qualifier.
4. **Checkout Selection** – limits output to a specific library, date or date range. You may select only Overdues, No overdues or Both.
5. **Bill Selection** – limits output to a specific library, date, or amount of bill.
6. **Use** gadgets  to ensure correct formatting of data.

Homeroom: 7C-HUBER  
 Homeschool:  
 Program:  
 User Status:  Active  Inactive  Both

Library: KAHS  
 User profile:  
 Grade:  
 Teacher:  
 Extended info:  
 blank field matches with Not Equal qualifier

Library:  
 Date checked out:  
 Date due:  
 Overdue:  Yes  No  Both

**NOTE:** Consult user record to verify where and how data is entered.

### Sorting Tab

1. **Select** sort from drop-down menu and select your sorting preference. (Example: Library/room/name will sort by homeroom, last name.) Sorting by call number has also been added.

### Output Options Tab

**Select** Brief, Long or Notices. Options vary for each type. Unavailable options are grayed out. Choose as many options as you wish.

### Brief Report

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.
2. Select either the full 14 digit user ID or the Alt-ID to display.
3. You may check just Overdues, just Unpaid bills (fines), or both.
4. Start New Page on Sort Key allows you to print one page per homeroom, program, etc.
5. Print Options for PC or MAC will be grayed out if this report format is preset to work with either type of computer.

### Sample Brief Reports

Overdues and Unpaid Bills checked.

```

INFOhio :: CIR - Overdues List (ciroverlist.pl) - Brief                               11/10/2005
=====
Name      Room Title                                     Amount
-----
SMITH, MEGAN MARIE  A114- Taking care of your cat / Joyc  1.00 Bill
           A114- Hound Heaven / Linda Oatman Hi  1.00 Bill
PEPIOT, DUSTIN LEE  A114- Deliver us from Evie / M.E. Ke  5.00 Due 10/20/04
           A114- World's Greatest Inventors      4.65 Due 05/19/05
SCHLEETER, ALICIA MA  A114- Black unicorn / Tanith Lee ; i  5.00 Due 03/07/05
    
```

Overdues, Unpaid Bills, and Total Bills and Charges checked.

```

KANS, SC-MOFFSINGER:
-----
SELHORST, ERIK      8C-MO One more July... a football di Bill  0.80
                   8C-MO Heroes of the Heisman Trophy... Due 05/01/07 0.80
                   8C-MO John Madden's heroes of footb Due...05/01/07 0.80
                                Total Estimated Fines: 1.60
                                Total Amount Billed: 0.80
-----
SIEFER, NICHOLAS    8C-MO The incredible journey / by S Bill  0.80
                   8C-MO The cat ate my gymsuit... a no Due 05/01/07 0.80
                   8C-MO Second heaven / Judith Guest... Due 05/14/07 0.35
                   8C-MO The catcher in the rye / J.D. Due...05/14/07 0.35
                   8C-MO One-eyed cat... a novel / by P Due 05/14/07 0.35
                                Total Estimated Fines: 1.85
                                Total Amount Billed: 0.80
    
```

**Long Report**

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.
2. User ID Selection - Select either the full 14 digit user ID or the Alt-ID to display on the finished report.
3. Start New Page on Sort Key allows you to print one page per homeroom, program, etc.
4. You can enter a message to be included for each student if desired (mini-notice), or leave message area blank for a list.
5. Select as many Field Selection Options as you wish to display on the finished report.

Report Type  
 Brief  Long  Notices  Spreadsheet

Report Format **1**  
 Plain Text  RTF  
 Portrait  Landscape  
 Normal  Condensed

User ID Selection **2**  
 ID  Alt-ID

General Options  
 Overdues  Unpaid Bills  
 HIDE Inactive Transactions  Total Bills and Charges  
 HIDE Active Transactions  Total Book Values **3**  
 HIDE Historical Transactions  Start New Page on Sort Key  
 Two Notices per Page  Show default Late Fee/Fine Message

Message (Notices and Long Report)  
**4**

Field Selection **5**  
 Item: Title  Date: Checkout  Patron: Room  
 Item: Barcode Number  Date: Returned  Patron: Teacher  
 Item: Callnum  Date: Due  Patron: Program  
 Item: Author  Date: Notice Date  Patron: Grade  
 Item: Estimated Fines  Patron: Name  Patron: Address  
 Item: Price  Patron: ID/Alt-ID  Patron: Homeschoo

**Sample Long Report**

```

INFOHIO - DLFN LONG overdue list - students - (circoverlist.pl)                                07/06/2009
-----
Name | Title Information | Dates | Status | Due
-----
Altman, GAIGE (LOGAN) Gr: 04 | I love you, Mary Jane | Out: --/--/-- | PROCESSF | 1.00
ID/Alt: 32612001506605 | Call: E BAL Val: $ 12.95 | Due: --/--/-- | Bill |
Room: 4A-SWICK | Bar: 32612010045494 | Ret: 06/30/09 |
| I love you, Mary Jane | Out: 01/19/09 | LOST | 12.95
| Call: E BAL Val: $ 12.95 | Due: | Bill |
| Bar: 32612010045494 | Ret: LOST |
| Leprechauns never lie | Out: 01/19/09 | OVERDUE | 1.00
| Call: E BAL Val: $ 7.61 | Due: 01/26/09 | 0.00 |
| Bar: 32612010005910 | Ret: --/--/-- | 0.00 |
    
```

**Sample Long Report with Message**

```

Name | Title Information | Dates | Status | Due
-----
Bard, TAYLOR (MARIE) Gr: 03 | Please take care of these obligations as soon as possible.
Room: 3A-DIENSTBERGE | Thank you!
| The adventures of Super Diaper Baby : the fi | Out: 11/07/06 | OVERDUE | 1.00
| Call: F FIL RC 270 Val: $ 9.16 | Due: 11/14/06 | 0.00 |
| Bar: 32612015002748 | Ret: --/--/-- | 0.00 |
-----
Barnes, BRAXTON Gr: 00 | Please take care of these obligations as soon as possible.
Room: KA-MARK | Thank you!
| Keep running Allen! | Out: --/--/-- | PROCESSF | 0.50
| Call: E BUL Val: $ 6.79 | Due: --/--/-- | Bill |
| Bar: 32612010006843 | Ret: 06/30/09 |
| Keep running Allen! | Out: 10/04/07 | LOST | 6.79
| Call: E BUL Val: $ 6.79 | Due: | Bill |
| Bar: 32612010006843 | Ret: LOST |
    
```

**Notices**

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.
2. User ID Selection - Select either the full 14 digit user ID or the Alt-ID to display on the finished report.
3. You may print 2 notices per page.
4. Select PC or Mac for this report.
5. You may enter a message to be included for each student if desired.
6. Select as many Field Selection Options as you wish to display on the finished report.
7. a. If you select *Item: Estimated Fines*, you may also select for the following message to appear (7b):

**NOTE:** *The fine amount displayed with OVERDUE items, is as of mm/dd/yyyy. Overdue fines will increase each day until the item has been returned.*

Report Type  
 Brief  Long  Notices  Spreadsheet

Report Format  
 Plain Text  RTF  Portrait  Landscape  
 Normal  Condensed

User ID Selection  
 ID  Alt-ID

General Options  
 Overdues  Unpaid Bills  
 HIDE Inactive Transactions  Total Bills and Charges  
 HIDE Active Transactions  Total Book Values  
 HIDE Historical Transactions  Start New Page on Sort Key  
 Two Notices per Page  Show default Late Fee/Fine Message

Print Options  
 PC  Mac

Message (Notices and Long Report)  
 Library staff can enter notice message here.  
 If left blank, no message will appear.

Field Selection  
 Item: Title  Date: Checkout  Patron: Room  
 Item: Barcode Number  Date: Returned  Patron: Teacher  
 Item: Callnum  Date: Due  Patron: Program  
 Item: Author  Date: Notice Date  Patron: Grade  
 Item: Estimated Fines  Patron: Name  Patron: Address  
 Item: Price  Patron: ID/Alt-ID  Patron: Homescho

Alington, JORDAN EDWARD  
 Mom and Dad  
 123 Any Street  
 Anytown, OH 40000  
 555-1234

Teacher : GALLMEIER  
 Grade : KC  
 Room : KC-GALLMEIER  
 Date : 07/09/2009

555-1234

NOTIFICATION OF OVERDUE ITEMS / FINES / FEES

Please take care of these obligations as soon as possible.  
 Thank you!

NOTE: The fine amount displayed with OVERDUE items is as of 07/09/2009.  
 Overdue fines will increase each day until the item has been returned.

* MISC *	Miscellaneous Charge or Bill by	Amount: 3.00
	Out: --/--/-- Rat: 06/26/08	
* OVERDUE *	Josephina the great collector by Engel, Diana Est. Fines: 1.00	
	32612010011322 - E ENG (Replacement Cost: \$15.07)	
	Out: 10/04/07 Due: 10/11/07	
* OVERDUE *	The field of the dogs / Katherine Paterson, Est. Fines: 1.00	
	32612015003142 - FIC PAT (Replacement Cost: \$9.36)	
	Out: 06/25/08 Due: 08/27/08	
	Total Estimated Fines: 2.00	
	Total Bill Amount: 3.00	

8. EMAIL CONSIDERATIONS:

a. If an email address is in the student’s record, fill out the email options on the Output Options tab. The individual notice will be emailed to each student (with a valid email address) that you selected for this report.

b. You can add an email address to a student’s record in Modify User on the Address tab.

**NOTE:** Before making manual changes, check with your ITC provider to be sure the Patron update process does not overwrite your manual entries.

c. To verify the email was sent – View the finished report, check View Log and Format Report. You will see a message if any of the email addresses are invalid.

```

*****
*                               Sent Notices                               *
*****
20450003447342 - lin528@gmail.com
*****
*                               Invalid/Missing Email                       *
*****
    
```

**Running the Report**

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

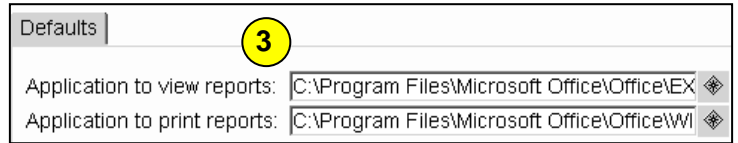
1. **Run** the report.
2. **Click** Finished Reports wizard.
3. **Select** report name and **click** View.
4. **Uncheck** View log.
5. **Uncheck** Format report.
6. **Click** OK. Your report will open in your pre-selected word processing program.
7. **Customize** the report and/or **save** it if you wish

**Spreadsheet Option**

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

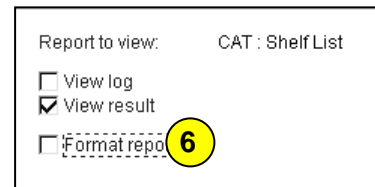
2. Under the Reports Wizard, **click** on Report Session.

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



4. **Click** Finished Reports wizard.

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



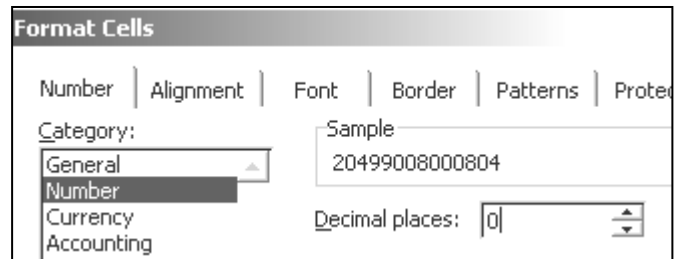
6. **Uncheck** 'View log' and 'Format report' and **click** OK.

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

8. Remember to **change** report session back to your Word Processing program (Winword, Appleworks, Text Edit, etc...) when you're done!

**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.



Sample spreadsheet:

	A	B	C	D	E	F	G	H	I	J
1	Bill/Charge	Patron Barcode	Name	Teacher	Patron Grade	Title	Item Barcc	Callnum	Author	Due Date
2	C	22612001103809	COTTERMAN, PAT	TUTTLE	7	Addy learn	3.26E+13	RC660	Porter, Co	8/29/2007
3	C	22612001119953	FRYE, PHILLIP	(FOSBURN	7	Ghosts be	3.26E+13	F JON RC	Jones, Ma	8/29/2007
4	C	22612001113006	GOODWIN, KELS	OSBURN	7	Abigail Ad	3.26E+13	RC 620	Wagoner, J	8/29/2007
5	C	22612001113006	GOODWIN, KELS	OSBURN	7	Changes fi	3.26E+13	RC 660	Tripp, Vale	8/29/2007
6	C	22612001113253	HARSHMAN, TYL	TUTTLE	7	Sing a son	3.26E+13	E SIL	Silvers, Vic	8/29/2007
7	B	MISSING	Missing Items - DO NOT DELETE--			Skin deep	3.26E+13	FIC RUB	Ruby, Lois	
8	C	22612001110002	SMITH, PAIGE	BAUMAN	7	Big Frog, L	3.26E+13	E MEN	Mendoza, J	8/29/2007
9	C	22612001119656	VANDYKE, CHRI	TUTTLE	7	Tracing ou	3.26E+13	973 SIL	Silver, Led	8/29/2007
10	C	22612001125752	ABRAM, KAITLY	HOHLBEIN	4	Ricky Ricc	3.26E+13	RC 490	Pilkey, Da	11/21/2006
11	C	22612001907704	ADAMS, BRAXT	CWARK	KG	Singing Sa	3.26E+13	E BUL RC	Bulla, Clys	10/11/2007
12	C	22612001124458	ARNOLD, JACK,	SOMMERS	5	Dragon rid	3.26E+13	RC 710	Funke, Co	11/21/2006
13	C	22612001500103	ARROYO, ASHLE	SWICK	4	Five Finger	3.26E+13	RC 640	DeClemen	11/20/2006
14	C	22612001710355	ARROYO, COLE	BOHN	2	Ten red ap	3.26E+13	RC 290	Hutchins,	11/27/2006
15	B	22612001700000	BACKUS, JARRE	GERDING	2	Captain Ur	3.26E+13	FIC PIL RC	Pilkey, Da	10/17/2007
16	B	22612001410451	BACKUS, JORE	GROCH	3	Captain Ur	3.26E+13	FIC PIL RC	Pilkey, Da	11/27/2006
17	C	22612001500202	BANKS, DAMION	SWICK	4	Harry Pott	3.26E+13	FIC ROW	Rowling, J	11/20/2006
18	C	22612001800206	BENNETT, MIKA	WIECHART	1	Rosie's W	3.26E+13	RC 100	Hutchins,	11/21/2006
19	C	22612001800354	BLAND, NATHAN	SUEVER	1	500 Hats c	3.26E+13	RC 520	Seuss, Dr	11/21/2006
20	C	22612130003367	BOHN, KIMBERL	UNKNOWN	FACULTY	Cranberry	3.26E+13	E DEV	Devlin, We	5/25/2007