

# Editing Another Institution's Report to Work in Your Environment

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# Hey, this report isn't working!

The screenshot shows a web application interface for a report titled "Wilson Lost Item Processing Fees Report". The browser's address bar shows the user is signed in as "maalvi". The application has a navigation menu on the left with categories like "Fines and Fees", "Transaction Date", "Owning Library", etc. The main content area is titled "Compound Layout" and displays a "No Results" message. Below the message, a list of filters is shown, including "Fine Fee Type", "User Group", "Return Date", "Fine FeeTransaction Type", and "Owning Library Name". A "Refresh" button is located at the bottom left of the main content area.

**Wilson Lost Item Processing Fees Report** Home Catalog Favorites Dashboards New Open Signed In As maalvi

Criteria **Results** Prompts Advanced

Subject Ar...

**Compound Layout**

**No Results**

The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

Fine Fee Type is equal to / is in **Lost item process fee**  
**and** User Group is equal to **UM employee, UMC employee, UMD employee, UMD processing, UMM employee, UMTC employee, minitex 6, processing**  
**and** Return Date is greater than **11/20/2013**  
**and** Fine FeeTransaction Type is null  
**and** Owning Library Name is not equal to / is not in **TC Bio-Med Vet Med, TC Bio-Med Wangensteen, TC Bio-Medical Lib Periodicals, TC Bio-Medical Library, TC Bio-Medical Library Acq, TC Bio-Medical Library Reserve, TC Law Library, TC Law Library Acquisitions, UM CROOKSTON Internet Resource, UM CROOKSTON Library, UM CROOKSTON Library Reserve, UM DULUTH - CED, UM DULUTH - NRRI, UM DULUTH American Indian, UM DULUTH GLBT Services, UM DULUTH Internet Resource, UM DULUTH Library Reserve, UM DULUTH Library Tech Serv, UM DULUTH Martin Library, UM DULUTH Multimedia Hub, UM DULUTH Tweed Museum of Art, UM MORRIS Briggs Library, UM MORRIS Briggs Library(MORDU), UM MORRIS Briggs Reserve, UM MORRIS Internet Resource, UM Rochester Library**

[Refresh](#)

# Check the Criteria and Filters

**Wilson Lost Item Processing Fees Report** Home | Catalog | Favorites | Dashboards | New | Open | Signed In As mgalvin

**Criteria** Results Prompts Advanced

**Subject Ar...**

- Fines and Fees
  - Fines and Fees Transactions
  - Transaction Date
  - Owning Library
  - Executed by Unit
  - User Details
  - Preferred Contact Info
  - Loan Details
  - Loan Policy
  - Staff Operator Details
  - Institution

**Selected Columns**

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Loan Details	Fines and Fees Transactions	User Details	Owning Library	Loan Details	Fines and Fees Transactions		
Barcode	Fine Fee Type	Primary Identifier	User Group	Owning Library Name	Return Date	Title	Fine FeeTransaction Type

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

- Fine Fee Type is equal to / is in Lost item process fee
- AND** User Group is equal to / is in UM employee; UMC employee; UMD employee; UMD processing; UMM employee; UMTC employee; minitex 6; processing
- AND** Return Date is greater than 11/20/2013
- AND** Fine FeeTransaction Type is null
- AND** Owning Library Name is not equal to / is not in TC Bio-Med Vet Med; TC Bio-Med Wangenstein; TC Bio-Medical Lib Periodicals; TC Bio-Medical Library; TC Bio-Medical Library Acq; TC Bio-Medical Library Reserve; TC Law Library; TC Law Library Acquisitions; UM CROOKSTON Internet Resource; UM CROOKSTON Library; UM CROOKSTON Library Reserve; UM DULUTH - CED; UM DULUTH - NRRI; UM DULUTH American Indian; UM DULUTH GLBT Services; UM DULUTH Internet Resource; UM DULUTH Library Reserve; UM DULUTH Library Tech Serv; UM DULUTH Martin Library; UM DULUTH Multimedia Hub; UM DULUTH Tweed Museum of Art; UM MORRIS Briggs Library; UM MORRIS Briggs Library(MORDU); UM MORRIS Briggs Reserve; UM MORRIS Internet Resource; UM Rochester Library

Catalog

# Top Five Pitfalls, the report won't work

- Names – user groups specific to institutions, specific ID numbers, modified by, creator - ANYTHING where names or numbers are specific
- Locations – library names, campus codes, library codes - SPECIFIC
- Fund Codes – if these are filtered on, often they are unique to the institution
- Vendor Codes – vendor account codes or vendor codes tend to be unique
- Your institution does have data in that field.

# Best Practices

- Remove or Edit Filters
- Remove Prompts or Change them to Filters
- Look for specific information and change it to something general or remove it.

# Pitfall One

## Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button and selecting its name in the catalog pane.

▼ Fine Fee Type is equal to / is in Lost item process fee

**AND** ▼ User Group is equal to / is in UM employee; UMC employee; UMD employee; UMD processing; UMM employee; UMTC employee; minitex 6; processing

**AND** ▼ Return Date is greater than 11/20/2013

**AND** ▼ ~~Fine Fee Transaction Type is null~~

**AND** ▼ Owning Library Name is not equal to / is not in TC Bio-Med Vet Med; TC Bio-Med Wangenstein; TC Bio-Medical Lib Periodicals; TC Bio-Medical Library; TC Bio-Medical Library Acq; TC Bio-Medical Library Reserve; TC Law Library; TC Law Library Acquisitions; UM CROOKSTON Internet Resource; UM CROOKSTON Library; UM CROOKSTON Library Reserve; UM DULUTH - CED; UM DULUTH - NRR; UM DULUTH American Indian; UM DULUTH GLBT Services; UM DULUTH Internet Resource; UM DULUTH Library Reserve; UM DULUTH Library Tech Serv; UM DULUTH Martin Library; UM DULUTH Multimedia Hub; UM DULUTH Tweed Museum of Art; UM MORRIS Briggs Library; UM MORRIS Briggs Library(MORDU); UM MORRIS Briggs Reserve; UM MORRIS Internet Resource; UM Rochester Library

**Solution: Remove Owning Library Filter  
or change it match local names.**

# Pitfall Two

The screenshot displays a software interface with a 'Subject Areas' pane on the left and a main workspace on the right. The 'Subject Areas' pane is expanded to show a tree structure under 'Cost Usage', including 'Usage', 'Cost Usage Details', 'PO Line', 'PO Line Type', 'Periods', 'Library Unit', and 'Institution'. The main workspace is divided into three sections: 'Selected Columns', 'Filters', and a data table.

**Selected Columns**  
Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column name to its name.

Cost Usage Details	Periods	Usage
Title	Issn	Fiscal Year Desc
		Usage
		Cost
		Cost per Use

**Filters**  
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Selected Columns pane.

▼ Fiscal Year Desc is equal to / is in FY-2012; FY-2013; FY-2014

# Fix Pitfall Two

Explanation: We didn't have data in our system for FY-2012 or FY 2013

**Mitchell - Cost per use**

Criteria Results Prompts Advanced

**Subject Areas**

- Cost Usage
  - Usage
  - Cost Usage Details
  - PO Line
  - PO Line Type
  - Periods
  - Library Unit
  - Institution

**Selected Columns**

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop to its name.

Cost Usage Details	Periods	Usage
Title	Fiscal Year Desc	Usage
Issn		Cost
		Cost per Use

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane.

Fiscal Year Desc is equal to / is in FY-2014; FY-2015



# Pitfall Three

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on the filter button in the Filter pane header, and then selecting its name in the catalog pane.

- ▼ Fine Fee Type is equal to / is in Lost item process fee
- AND** ▼ User Group is equal to / is in UM employee; UMC employee; UMD employee; UMD processing; UMM employee; UMTC employee; minitex 6; processing
- AND** ▼ Return Date is greater than 11/20/2013
- AND** ▼ Fine FeeTransaction Type is null
- AND** ▼ Owning Library Name is not equal to / is not in TC Bio-Med Vet Med; TC Bio-Med Wandensteen; TC Bio-Medical Lib Periodicals; TC Bio-Medical Librarv; TC Bio-Medical

Again, remove filter or match it to local parameters.