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Bookmark's Reports module is very powerful and flexible. A wide range reports about items and borrowers can be generated.

The Reports Menu presents four main areas:
Catalogue Reports

A variety of reports can be generated based on cataloguing data. These range from a simple list of items found by a comprehensive search to specific reports.

Bookmark allows making up your own reports and queries, too.
Catalogue Reports Process

1. Define your Query – what to find
2. Select the Report – how to see what is found
3. View, print, export or save the report

Defining a Query

Queries are the path that leads to a report, like the Yellow Brick Road to Emerald City. A query defines what is being examined but the report tells how it is presented.

Catalogue Reports offers three types of queries:
- Standard Query
- Easy Query
- Quick Search
- Download from a memory barcode scanner

Standard queries are a very thorough search. All fields can be examined in a variety of ways. Up to six different fields can be searched at the same time.
A Query search operates by comparing what is being looked for against what is in the database.

Each query line requires:

1. Select the field to be searched (where to search)
2. Choose a condition (how to search)
3. Enter the value being compared in the search (what to search)
4. Select a link (between rows) to include another field if required.

Click on the optional Order by button to pre-set the sort order of the items found. (Many reports allow the results to be sorted afterwards, too.)

There are many ways to do the comparison.

Example 1: locate all items about whales. This same search can be done in Search as a Keyword, Title or Subject search. The following is how it is done as a Query.

Step 1 -- Select the Field to search

Use the droplist beneath Field to select the area to search. Use the scrollbar to move up and down through this large list.

Search for "whales" is best done via Subjects and possibly Title or Keyword. Click on Subjects.
Note the "Keyword" entry near the end. This searches several major fields at the same time for the term(s) entered.

Note the special "Find everything" at the end of the list. Selecting this returns all items in the catalogue.

**Step 2 -- Choose the Condition**

After selecting a field, the type of condition needs to be selected. Condition is sometimes called an Operator.

When searching, Bookmark compares the text, number or date entered against data found in the selected field for every item. Where the condition is TRUE, the item is considered found, otherwise it is not.

The evaluation can be any one of sixteen types:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains</td>
<td>The data in this field is contained anywhere the text value entered</td>
<td>Contains AGO (for Dragon)</td>
</tr>
<tr>
<td>Begins with</td>
<td>The data in this field starts with the text entered</td>
<td>Begins with DRA (for Dragon)</td>
</tr>
<tr>
<td>is equal to =</td>
<td>The text, number or date entered is exactly equal to the data required.</td>
<td>= Y06 (borrowers with a class of Y06)</td>
</tr>
<tr>
<td>is less than or equal to &lt;</td>
<td>The text, number or date entered is equal or less than the data required</td>
<td>&lt; 17/02/14 (less than or equal to 17 Feb 2014)</td>
</tr>
<tr>
<td>is greater than or equal to &gt;</td>
<td>Equal or greater than the text, number or date entered</td>
<td>&gt; Giraffes (finds Marmasets, Lemurs, Pigs and Zebras but not Elephants or Dogs)</td>
</tr>
<tr>
<td>is between</td>
<td>The data in the field is within the beginning and end of two numbers, text or dates. The word and appears between the two values</td>
<td>is between 34 and 49 is between 17/02/2014 and 28/02/2014</td>
</tr>
<tr>
<td>is not equal to ≠ or &lt;&gt;</td>
<td>The text entered is not equal to the data required.</td>
<td>≠ Y06 (all borrowers who do not have a class of Y06)</td>
</tr>
<tr>
<td>Does not contain</td>
<td>The data in the text value entered is not found anywhere within the item field</td>
<td>Not Contains AGO (everything but...)</td>
</tr>
<tr>
<td>Does not begin with</td>
<td>The data in the item field does not start with the text value entered</td>
<td>Not Begins with DRA</td>
</tr>
<tr>
<td>Is any of</td>
<td>The data in the item field can be any of the values listed. Values are separated by commas</td>
<td>Is any of Ant, Donkey, Hawk Is any of 3, 16, 28, 67</td>
</tr>
<tr>
<td>is empty</td>
<td>All items in which the selected field has no data (value ignored)</td>
<td>Same as = Null</td>
</tr>
<tr>
<td>is not empty</td>
<td>All items have something in the field, it does not matter what it is (value ignored)</td>
<td>Same as &lt;&gt; Null</td>
</tr>
<tr>
<td>is less than but not equal to &lt;</td>
<td>The data in the item fields is less than the value entered but not equal to it</td>
<td>&lt;= 16 (finds 1 to 15)</td>
</tr>
<tr>
<td>is greater than but not equal to &gt;</td>
<td>The data in the field is greater than the value entered but not equal to it</td>
<td>&gt; 350 (350.01 upwards)</td>
</tr>
</tbody>
</table>
The data in the field is not contained within the listed entries is not any of 3,4,6 (finds 1 or 2 or 5 and anything => 7)

The data in the field ends with the text value entered ends with GON (Dragon, Paragon...)

Used with Keyword to see if the search words are in the field match green dragon

Checks multiple entries to see if any of them are contained in the field. Values are separated by commas. contains any of red,green,blue

Checks multiple values to see if they are not contained in the field. Values are separated by commas. does not contain any of red,green,blue,yellow

Some of the above conditions only work on text while others work on text, numbers or dates.

In the case of “whales”, a Contains search would find everything with the word WHALES shown anywhere within the subject. Note that the word “whale” and “whales” are two different words. “Whale” is a subword of “whales” and one could argue that searching for “whale” without the final ‘s’ might be better. Bookmark’s Search module, however, uses a stemming algorithm to equate plurals and singulars. Query does not.

For the whale example search, choose CONTAINS as the comparison Condition.

**Step 3 -- Enter the value**

The third piece of information is the actual value being used for the comparison. Depending on the field, this can be text, a number or a date. In our example, it is whale.

The case of letters is ignored during searches. 'S' and 's' are identical so it does not matter in which case the letters are typed.

Correct punctuation is important as it is not ignored. Babysitter’s Club is not the same as Babysitters Club.

**Alphabetic vs. Numeric**

Numbers and dates are treated differently to text. Bookmark determines which is being used based on the field and the condition. Contains, Begins with, Does not contain, Does not begin with and Ends with can only operate on text, so the value entered is treated as text even if it is a number.

A List button appears from which data can be selected, or the number typed. A Calendar button appears for any date field.

**Between**

The condition Between is special in that additional information must be entered as the Value. The Value box, the lowest value is typed followed by a space then the word And or the symbol & or a dash (-) or three dots (...) followed by another space then the highest value.

- 500.001 and 600.0001
- Elephants and Giraffes
- 23 & 35
Spaces and Symbols
With the exception of the above, blank spaces in text are treated as if they are symbols so they do matter. Punctuation and other symbols are not ignored. The * and ? symbols are ignored as they are used for special purposes.

Length
It is also possible to search for text which is a certain length – e.g. number of characters long. Type a ^ symbol (Shift 6) and then the length value. Do not place a space between. For example, ISBN is equal to ^10 will find all the items having ISBNs which are exactly 10 characters long regardless of the actual characters themselves.

Is Any of, Contains any of, Does not contain any of
These three conditions can check for multiple entries in the value field. Values are listed with commas between each.

- Is Any of – if any of the listed values are equal to the contents of the search field, the record is found
- Contains any of – if any of the listed values are contained within the search field, the record is found. This includes partial matches.
- Does not contain any of – if any of the listed values are contained within the search field, the record is not found.

Step 4 -- Choose a link
Links allow you to construct more complex searches or indicate you have finished defining the search and are ready to start. Links do the same job as AND and OR in the public Search.

Selecting AND will search for something that is Something AND Something ELSE where both things must be present in the item’s record at the same time. OR means Something OR Something ELSE. In this case either thing can be present, just one of ‘em, but they both don’t have to be there as in an AND link.

- AND means “both”, “as well as”, “at the same time as”. And narrows searches.
- OR means “either/or”, “either one” and widens a search.
- NOT means the first condition is true but not the second

It is important to understand the differences as computers treat these terms very literally. In common speech, ‘And’ may mean ‘Or’ but not to a computer. Example human speech: 'I'd like everything you have about dogs and cats.' In this case, And really means Or.

Mixing links in queries can produce unpredictable results.

In the case of the Whales search, it would be an idea to check the title as well. An Or link would be used and the next line would be Title Contains Whale.

Brackets
Advanced queries can also make use of brackets to set order-of-precedence in multi-row queries.

Click on the left rectangle on a row to create a left bracket.
Click on the right rectangle on a row to create a right bracket.

There must be an equal number of left and right brackets and they must be ordered correctly.

**Ready**

When the query has been filled out Click on **OK**.

**Saving and Retrieving Queries**

The Query can be saved so it can be reused in future without having to be re-entered. Before clicking on OK, click on **Save** and enter a name you make up for the Query.

A saved query be retrieved and re-used.
Order by

The *Order by* button opens a dialog that sorts results during the search rather than after.

![Define sort order window](image)

Specify how you want the results sorted. Up to four fields can be used to sort. Click Clear to leave unsorted.

- **Sort by:** Author, **Ascending**
- **Then by:** Title, **Ascending**
- **Then by:**
- **Then by:**

Up to four "sort levels" are available.

By default (sort fields are blank), items are retrieved in item-number order.

Sorting can be either lowest-to-highest (ascending) or highest-to-lowest (descending).

Results can be further sorted when viewing lists in column format.

In the example above, the results are listed alphabetically by author, and within each author by title.
Examples of Queries

All the items about SPACE
This is best done as a two part search: TITLE contains SPACE or SUBJECT contains SPACE.

The Illustrator Quentin Blake
Sometimes author names have been entered as BLAKE, Quentin or as Quentin BLAKE. You could have a mixture. Searching for AUTHOR contains BLAKE results in items by authors including and in addition to Quentin Blake, such as Roj Blake. If you search for BLAKE, Quentin, you might miss entries without the comma, the space, too many spaces, etc. The best way to do this search is to break it into two parts: AUTHOR contains BLAKE and AUTHOR contains QUENTIN. Doing each word as a separate part eliminates the possible order and punctuation problem. Alternately use the Match condition. The order of the words in the value does not matter. Author MATCH Quentin Blake finds the same as Author MATCH Blake Quentin.

All items in location Big Books
If Big Books have been entered as location “Big Books”, the search is Location EQUALS big books. If you did Location contains big books, you would also find items having locations big books fiction, big books non-fiction, etc. Equals means an exact match so only those in location “big books” would be found. Not case sensitive. B=b.

All items in the 300 call number range
CALL NUMBER between 300 and 399.999.

All lost cassette tapes
Assuming the Status for lost is 5 and the Item Type for tapes is CAS, then the search is STATUS equals 5 and Item Type EQUALS CAS. This means the items found must have both a status equal to 5 as well as an item type of CAS. Items of status 5 but not type CAS will not be found.

Items still on loan but due for return during May only
Items on loan all have a status value of 2. Search for Status equals 2 and the range of dates. STATUS equals 2 and DUE DATE between 1/5/16 and 31/5/16.

Items with non-alphabetic titles
A bit of a silly search, really. TITLE less than A or TITLE greater than or equal to {.

Find the number of items currently overdue
While this can be done in the Overdues module, here is how to do it as a Query:

STATUS equals 2 and DUE DATE less than today’s date

The number of items overdue will be the same as how many are found by this search.
Easy Query

An Easy Query is a simple, pre-set query. It can be much simpler to use Easy Query than setting up a regular query.

It can be used to quickly and easily generate a query for several item types, locations, status types or quick entry items.

Selecting three different item types produces the Query:

*Item type is any of BB,FIC,JF*
Quick Search

The Quick Search is more like the easy-to-use search system found in the regular Search module. It is a word-based search that does not depend on the word order.

Type in the search terms then click on an icon to define the search area. Pressing Enter is the same as clicking on Keyword.

Import and Download

These options allow item numbers to be used rather than queries. They work the same way in Stocktaking / Scan Item. Import reads a file of barcodes. Download brings in barcodes from a memory reader. Reports are then based on the barcodes read rather than a query.
Choose the Report

When the query has been defined or retrieved, choose a Report.

*Step 2 - Choose report*

<table>
<thead>
<tr>
<th>Standard list of items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose fields for list of items</td>
</tr>
<tr>
<td>Export items</td>
</tr>
<tr>
<td>Total cost</td>
</tr>
<tr>
<td>Titles based on number of copies</td>
</tr>
<tr>
<td>Weeding report</td>
</tr>
<tr>
<td>Items not borrowed since a date</td>
</tr>
<tr>
<td>Items never borrowed</td>
</tr>
<tr>
<td>Export items for Scholastic Literacy Pro (Lexile)</td>
</tr>
<tr>
<td>Export items for Accelerated Reader</td>
</tr>
<tr>
<td>Items on loan to a class</td>
</tr>
<tr>
<td>List of authors or series of items found</td>
</tr>
<tr>
<td>Cost of items</td>
</tr>
<tr>
<td>Loans per item</td>
</tr>
<tr>
<td>Titles with multiple copies</td>
</tr>
<tr>
<td>Purchase date report</td>
</tr>
<tr>
<td>Australian authors</td>
</tr>
<tr>
<td>Age analysis</td>
</tr>
<tr>
<td>Printout with covers</td>
</tr>
<tr>
<td>List items with cover images</td>
</tr>
<tr>
<td>List items without covers</td>
</tr>
</tbody>
</table>
Standard list of items

Selecting the Standard List of Items displays all items found by the query and showing their number, title, call number, status number, item type number and item type description.

In Bookmark this type of report form is called a "Column Format" report. Data is arranged in columns and rows. The form has its own range of special functions.

The Font can be changed and the size of the font.

Print (F7 or CTRL P) prints the list exactly the way it looks on the form.

The widths of the columns can be changed by placing the mouse pointer on the gap between a column heading, holding down the left button and dragging left or right. It is possible to run columns off the right edge, in which case a horizontal scrollbar appears.

The entire list can be sorted. Click on the heading of a column to order the whole list based on data in that column (field). Clicking a second time sorts the list in reverse order.

The list can be saved. Click on the Save button.
Three common formats are offered. All of these are understood by Microsoft Excel.

Note: Comma format forces quote marks around text fields but Tab and Bar formats do not.

Double click on a row to open a pop-up Add/Edit cataloguing window. Details of the item can be viewed and altered.

Multiple rows can be highlighted and then either the Edit – Remove row(s) option on the top menubar used or the Delete shortcut key pressed. The items are removed from the list. They are not deleted from the catalogue.

The Menubar at the top of the form contains additional functions.

Edit allows changing the fields being displayed.

A page break (new page) can be inserted causing the printer to begin a new page at that line. Highlight the line, then hold down the CTRL key and press B at the same time. <PAGE> will be inserted at a line.
When the list is re-displayed the columns are those chosen but they are all of equal width. Slide the headings to adjust the column widths.

Under Format, the display and printout can be switched between Landscape and Portrait modes. Landscape is wider. The Column Widths option displays the widths of columns in tens of millimetres.

Use the Report option at the top to save the format. The columns and their widths and the font and size are saved using a name you specify. Saved reports are listed beneath the built-in Reports on the Cataloguing Reports window.
Remove Report can be used to delete a previously saved report format.
Choose Fields for List of Items

This report can also be produced from the standard list. It allows you to choose the fields (columns) you wish to see.

Once chosen, the width of the fields is the same. Slide them to the desired place and use the Save Report format if you want to re-use the combination.
Export Items

The Export Items report is used to save data. Several formats are available:

- Tab-delimited text
- Comma-delimited text
- Print text (as viewed)
- Merge format (all cataloguing fields for transfer to another Bookmark system)
- CPAC format (format used to upload data to the CPAC Internet database)
- USMARC format (standard library interchange format)

After selecting Tab, Comma or Print formats, choose the fields to be included with each record exported.
The other USMARC format exports all catalogue fields with each record.

**Total Cost Report**

This shows the sum of the costs of all items found in the Query.

![Total Cost Report](image)

**Titles Based on Number of Copies**

This report produces a list of titles based on not only the Query but also a specified number of copies.

![Titles Based on Number of Copies](image)
Choose a condition: equal to, less than or equal to, greater than or equal to. Then specify a value to indicate the number of copies.

<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
<th>Call number</th>
<th>Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>23062</td>
<td>Rainforest, Bunya Mountains, Queensland</td>
<td>KIT 300.7 New</td>
<td>17</td>
</tr>
<tr>
<td>23054</td>
<td>Hyde Park, Sydney, from Chancery Square</td>
<td>KIT 300.7 New</td>
<td>17</td>
</tr>
<tr>
<td>23055</td>
<td>Hyde Park, Sydney, from Chancery Square (2nd Copy)</td>
<td>KIT 300.7 New</td>
<td>17</td>
</tr>
<tr>
<td>27602</td>
<td>English K-6 Teaching Kit, Stage 2 - Questions, Statements, Com...</td>
<td>KIT 428.007 Eng</td>
<td>9</td>
</tr>
<tr>
<td>30260</td>
<td>Science Discussion Pictures - No. 24 - Equilibrium</td>
<td>PNK1F 538 Sau</td>
<td>24</td>
</tr>
</tbody>
</table>

**Items Not Borrowed Since a Date**

This allows listing items which have not been borrowed since a specified date based on the Query. Useful for weeding.

**Items Never Borrowed**

These are items found by the Query which have never been borrowed.
Export items for Scholastic Literacy Pro (Lexile)

This report generates a CSV format file containing data required by Scholastic Literacy Pro. The fields exported are ISBN, Title and Author.

Unless changed, the name of the file is Items.csv. This is the file to upload to the Literacy Pro website.

Export items for Accelerated Reader

This report is similar to the Lexile report. It produces a CSV file with ISBN, Title and Author, following the strict guidelines imposed by AR.

Items on loan to a class

This report produces a list of items on loan, based on the Query criteria, to selected classes.

The actual report shows the items and borrowers.
List of authors or series of items found

Choose to see just author names or series titles or just illustrators or authors without illustrators.

Illustrators are identified by the letters illus as part of the author entry – i.e. [illustrator] or illus.

This report lists just the authors or series titles or illustrators from the items found by the query. The number of items against each entry is also shown. The list can be sorted in order by clicking on a column heading.
### Author

<table>
<thead>
<tr>
<th>Author</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abagnale, Maria.</td>
<td>2</td>
</tr>
<tr>
<td>Abdelnoor, R.E. Jason</td>
<td>11</td>
</tr>
<tr>
<td>Abelá, Deborah</td>
<td>3</td>
</tr>
<tr>
<td>Aboust, Marguerite</td>
<td>3</td>
</tr>
<tr>
<td>Abrams, Douglas</td>
<td>1</td>
</tr>
<tr>
<td>Abrams, J.J.</td>
<td>1</td>
</tr>
<tr>
<td>Aburto, Jesus</td>
<td>5</td>
</tr>
<tr>
<td>Aburto, Jesus [Illustrator]</td>
<td>2</td>
</tr>
<tr>
<td>Accamando, Franco</td>
<td>1</td>
</tr>
<tr>
<td>Acey, Mark</td>
<td>2</td>
</tr>
<tr>
<td>Adam, Luisa</td>
<td>1</td>
</tr>
<tr>
<td>Adams, Colleen</td>
<td>1</td>
</tr>
<tr>
<td>Adams, Margaret</td>
<td>2</td>
</tr>
<tr>
<td>Adams, Michael</td>
<td>2</td>
</tr>
<tr>
<td>Adams, Michael Edwin</td>
<td>6</td>
</tr>
<tr>
<td>Adams, Simon</td>
<td>4</td>
</tr>
<tr>
<td>Adamson, Thomas K</td>
<td>14</td>
</tr>
<tr>
<td>Adegloke, Yomi</td>
<td>1</td>
</tr>
<tr>
<td>Adler, David A</td>
<td>1</td>
</tr>
</tbody>
</table>

### Series

<table>
<thead>
<tr>
<th>Series</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jolly grammar</td>
<td>99</td>
</tr>
<tr>
<td>Geronimo Stilton</td>
<td>60</td>
</tr>
<tr>
<td>Diary of a Minecraft Zombie</td>
<td>31</td>
</tr>
<tr>
<td>Goosebumps</td>
<td>26</td>
</tr>
<tr>
<td>The Baby-sitters Club</td>
<td>24</td>
</tr>
<tr>
<td>WaifCo</td>
<td>24</td>
</tr>
<tr>
<td>Dog Man</td>
<td>23</td>
</tr>
<tr>
<td>DK eyewitness</td>
<td>22</td>
</tr>
<tr>
<td>National Geographic Kids</td>
<td>19</td>
</tr>
<tr>
<td>Football superstars</td>
<td>19</td>
</tr>
<tr>
<td>Beast quest</td>
<td>19</td>
</tr>
<tr>
<td>Billie B Brown</td>
<td>19</td>
</tr>
<tr>
<td>Ultimate supercars</td>
<td>18</td>
</tr>
<tr>
<td>Tashi</td>
<td>18</td>
</tr>
<tr>
<td>Tom Gates</td>
<td>17</td>
</tr>
<tr>
<td>Diary of a wimpy kid</td>
<td>17</td>
</tr>
<tr>
<td>Animal lives</td>
<td>17</td>
</tr>
<tr>
<td>Alex Rider</td>
<td>17</td>
</tr>
<tr>
<td>Go girl!</td>
<td>17</td>
</tr>
<tr>
<td>Number</td>
<td>Title</td>
</tr>
<tr>
<td>--------</td>
<td>----------------------------------------------------</td>
</tr>
<tr>
<td>1</td>
<td>The amazing story of Adolphus Tips / Home to mother</td>
</tr>
<tr>
<td>2</td>
<td>Ringsworld</td>
</tr>
<tr>
<td>6</td>
<td>Blood fever</td>
</tr>
<tr>
<td>7</td>
<td>Dog Zombies rule (for now)</td>
</tr>
<tr>
<td>20</td>
<td>The pots you get</td>
</tr>
<tr>
<td>90</td>
<td>Tiddles: the special Tassie devil</td>
</tr>
<tr>
<td>560</td>
<td>Wolfe</td>
</tr>
<tr>
<td>562</td>
<td>maddi west and the tongue talker</td>
</tr>
<tr>
<td>563</td>
<td>The unforgotten cost</td>
</tr>
<tr>
<td>564</td>
<td>fox a dog</td>
</tr>
<tr>
<td>565</td>
<td>Mission Fox Book</td>
</tr>
<tr>
<td>1000</td>
<td>The Great Jimmie James</td>
</tr>
<tr>
<td>1001</td>
<td>The Best Pet</td>
</tr>
<tr>
<td>1002</td>
<td>Green Fingers</td>
</tr>
<tr>
<td>1007</td>
<td>Lester and Clyde (Happy 21st Birthday)</td>
</tr>
<tr>
<td>1009</td>
<td>The Prince of Egypt</td>
</tr>
<tr>
<td>1011</td>
<td>Through Heaven's Eyes</td>
</tr>
<tr>
<td>1013</td>
<td>Outline Maps of Canberra, A.C.T. and Tasmania</td>
</tr>
<tr>
<td>1016</td>
<td>Mission: Australia</td>
</tr>
<tr>
<td>1018</td>
<td>Voices In The Park</td>
</tr>
<tr>
<td>1019</td>
<td>Mark Warren's Atlas of Australian Surfing</td>
</tr>
</tbody>
</table>

This report includes a cost column. The sum of all the costs is shown above the list.
Loans per Item

This report displays a list of items found showing the number of loans issued over a specified time.
Purchase date report

The Purchase date report lists items showing their serial number, cost, location, cost centre, supplier, and purchase date. The report is intended to provide a list of assets. Use the query to restrict the items listed to specific areas and date ranges.

Australian authors

Choose report:

- List items
- List authors

[Options for choosing reports]

[OK] [Cancel]
Age Analysis

This is a statistical report that shows the number of items published or purchased per year, based on a query.
Printout with covers

This report prints a list of items showing their cover images.

Due to the size of images, only 8 entries per page are printed.
Items without Covers

This lists items that do not have book cover images.

User Reports – Make Your Own

Your own reports can be produced using the Report control on the display list window.

To create your own report, click on Report on the menubar at the top of a list style report (such as Choose Fields) then Save.

User reports are shown in red.

User reports include the fields selected and the widths to which they have been set when saved.

To change a User Report, open it, make the changes and save using the same name.

To remove a user report, highlight it and click Remove Report.
Borrower Reports

Query

Borrower Reports work in a similar manner to Catalogue Reports, except the fields are different.

Queries can be saved and retrieved.
Reports

Step 2 - Choose report

Standard list of names
Choose fields for list of names
List of items on loan to each borrower
List of items in each borrower's loan history
History statistics based on item types for each borrower
History statistics based on call number categories for each borrower
Rank order names based on number of loans
Export borrowers in merge format
Overdue notice counts
Last overdue notice items
List borrowers who have certain items on loan or not on loan

List of Names

A simple list of borrowers is generated with this report. The Report Form operates identically to the Catalogue Reports list of titles.
Select Fields to List

List of Items on Loan to Each Borrower

This report lists each borrower beneath which appears items current on loan to them.
The report form is a Notepad-like editbox. Changes can be made then printed or saved as a text file.

Arrows on the right side mark overdue items.

**List Items in Each Borrower's Loan History**

Use the Query to identify a particular class or year level.
This is a column style report. Each borrower is highlighted and previously borrowed items listed beneath.

**History Statistics Based on Item Types for Each Borrower**

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Class</th>
<th>Items in History</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WEBBER, Jane</td>
<td>STAF</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>CHINGCHEN, Di</td>
<td>STAF</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>BATTEN, Sarah</td>
<td>15B</td>
<td>109</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>BURLINGTON, Megan</td>
<td>15B</td>
<td>20</td>
</tr>
</tbody>
</table>
History Statistics Based on Call Number Categories for Each Borrower

Previous loans are broken down into Dewey categories.

**Rank Order Names Based on Number of Loans**
Borrowers are listed in order from most loans to least.

Click on a name and the Items button to see the history list for the borrower.
Export Borrowers in Merge format
Borrowers can be exported in Bookmark’s special Merge format for transfer to a stand-alone system.

Overdue Notice Counts
Shows the number of overdue notices issued to borrowers, including the date of the last notice.

Last Overdue Notice Items
Lists the most recent overdues. Shows cost per item and total cost.

List Borrowers Who Have Certain Items on Loan or Not on Loan

Produces a list of borrowers that have certain items on loan or not on loan.
*Not on loan* allows searching for an item like iPads and being able to see who does not have one on loan.
Circulation Reports

Bookmark places a record of every loan and return into the Circulation Log (CircLog). The CircLog acts as a historical record of loan and return transactions. Reports here are based on the log.

Beneath this page's title appears the range of dates over which the log has records. The last date is the most recent loan or return.

A query can be used to filter the report – i.e. to a specific class and/or type of item.
Query

The CircLog's Query form is similar to but slightly different from that used by Catalogue and Borrower.

Queries are defined the same way as for Catalogue and Borrower Queries. The fields are a subset of Catalogue fields.

In addition to the fields, a date range can be specified: “from” and “to”, which restricts the query in time, such as a month or term. And the results can be based on Loans only, Returns only or both.
Circulation Reports

List Transactions Records

A simple list of all the loan and return log records found by the Query.
Rank Order Items by Number of Loans (most borrowed)

This report produces a list of entries in order from most borrowed down.

It first asks for the maximum number of entries you wish to include in the list. The default is 100.

Use the spinbox to change the value then click on OK.

The "Count" column shows the number of loans for the item. This value is the total of all loans for all copies of the title. All items with the same Link value are considered copies. As a result, items with many copies can appear high in the list even though the copies may have been borrowed only once or twice.

With an appropriate query, this report can show the "most borrowed" items for a class, year level, or other combinations.
Rank Order Borrowers by Number of Loans (most borrowed)

This report produces a list of people in order of those who have borrowed the most items and down. It works similar to the above report.
Item Type Count

This report shows the number of items found by the Query broken down by Item Type.

Borrower Class Summary

The Class Summary report lists the number of loans and returns from every class based on the Query. This is a type of library activity report.
Borrower Type Summary

Circulation activity for each borrower type based on the query is displayed.

<table>
<thead>
<tr>
<th>Type</th>
<th>Borrower type</th>
<th>Loans</th>
<th>Returns</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Years P. 1-2</td>
<td>11,167</td>
<td>26,840</td>
<td>38,007</td>
</tr>
<tr>
<td>2</td>
<td>Year 3.4</td>
<td>22,966</td>
<td>7,249</td>
<td>36,214</td>
</tr>
<tr>
<td>3</td>
<td>Year 5</td>
<td>4,451</td>
<td>1,766</td>
<td>6,217</td>
</tr>
<tr>
<td>4</td>
<td>Year 6</td>
<td>7,140</td>
<td>1,309</td>
<td>8,449</td>
</tr>
<tr>
<td>5</td>
<td>Parents</td>
<td>3,818</td>
<td>43</td>
<td>3,861</td>
</tr>
<tr>
<td>6</td>
<td>Teacher</td>
<td>6,874</td>
<td>6,064</td>
<td>12,938</td>
</tr>
<tr>
<td>7</td>
<td>Ancillary Staff</td>
<td>189</td>
<td>4,990</td>
<td>5,179</td>
</tr>
<tr>
<td>8</td>
<td>Library Staff</td>
<td>97</td>
<td>6,322</td>
<td>6,419</td>
</tr>
<tr>
<td>9</td>
<td>Ten</td>
<td>16</td>
<td>2,414</td>
<td>2,430</td>
</tr>
</tbody>
</table>

Year Level Summary

Circulation activity based on year levels.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2,188</td>
</tr>
<tr>
<td>2</td>
<td>23,443</td>
</tr>
<tr>
<td>3</td>
<td>20,958</td>
</tr>
<tr>
<td>4</td>
<td>22,262</td>
</tr>
<tr>
<td>5</td>
<td>14,752</td>
</tr>
<tr>
<td>6</td>
<td>10,747</td>
</tr>
<tr>
<td>E</td>
<td>629</td>
</tr>
<tr>
<td>K</td>
<td>12,374</td>
</tr>
<tr>
<td>P</td>
<td>3,695</td>
</tr>
<tr>
<td>S</td>
<td>19,482</td>
</tr>
<tr>
<td>T</td>
<td>9,380</td>
</tr>
<tr>
<td>Totals</td>
<td>161,444</td>
</tr>
</tbody>
</table>
Number of Loans Per Item Type Per Borrower Type

This list shows the number of entries found by the Query broken down by item type (down) and borrower type (across). This is a very detailed breakdown of activity.

Monthly Loans Statistics

This list is a breakdown of activity per month for one year. If multiple years are searched in the query, use the Next and Back buttons to change the year.
Daily Summary Statistics

This shows the number of loans and returns for each day over the time period used in the Query.

Summary of all loans per month

This report shows the total number of loans per month over many years. It does not use the Query. It can be used as a snapshot of library usage.
Count by Authors, Series, Location, Sublocation or Collections/Genres

Click on the column heading Count to sort the list either ascending or descending.

Rank Order Only PRC Items by Number of Loans

This report lists Premier’s Reading Challenge entries only, if items are tagged and levelled.
List Only Lexiled Items

This report lists the loans and returns for items with a lexile value.

Statistics by Call Number Categories

The report is filtered by the query.
Statistics by Collection/Genre and Year Level

This report can show the number of loans per year level for every collection or genre.
Statistics Reports

This section provides useful statistics about the entire collection.
**Item Type Count**  
This is a list of the number of copies of items broken down by Item Types.
Status Types
This is the number of items broken down by each Status.

![Status count table]

Due Date Categories Count
The number of items in each due date category.

![Due Date Category count table]
**Loan Restrictions Count**

Items broken down by borrower type loan restrictions.

---

**Call Number Group Counts**

This report counts the number of copies of items in various Dewey call number categories. The counting process assumes standard Dewey call numbers as described below. If you have call numbers different from this, the counts may not be accurate.
Rules:

- A call number that begins with the letter T or TR is a “Teacher Resource”.
- Call numbers beginning with EF or PF are counted as “Easy Fiction”.
- Call numbers beginning with F counted as “Fiction”.
- Call numbers beginning with SF or AF are counted as “Senior Fiction”.
- A call number that starts with a digit between 0 and 9 in the first, second, third or fourth position is assumed numeric and counted in one of the 10 Dewey number categories listed. If the call number has one of the letter combinations above, these take precedence and the number is ignored and counted in the category with the corresponding initial letter combination.
- Anything else is considered 'unidentified'.
Count Copies

This report displays the number of titles that have a certain number of copies. In the example below, 22,120 titles have one copy, 145 have two copies, 24 have three copies, etc.

Aged Analysis

The Aged Analysis report can be used to determine the age of various parts of the library.

The report displays the Dewey categories used by the “Call number groups”. Next to each, the total number of items found is given, then the number of items with publishing or acquisition years in 5-year range categories.
An Age Analysis report can be used to assist with weeding.

![Aged Dewey Analysis](image)

**Cost Report**

This report can be used to obtain a snapshot of the total cost of various parts of the collection.

![Cost analysis report](image)
Total costs for each column are displayed at the bottom.

**Additions Count and Deletions Count**

This report displays the number of items added or deleted to the collection over specific years.
Highlight the year then click OK.

Sites, Collections, Cost centre, Lexile, PRC, Level, Loan Limit Type counts

These reports show the number of different entries in the above fields.
Count Copies per Title

Lists the number of titles that have a certain number of copies. Use the next report to view the titles.
Search Reports

Bookmark can keep track of the number of searches made each month, and also keep a list of the searches entered. This section allows examination of that data.
Search Statistics Report

This report shows the number of searches attempted every month per year. It represents overall search activity.

Search Query Report

The search query report lists all recorded searches, if this function is active.
Search Log Maintenance

The search maintenance window is used to remove old entries from the query list, or to clear the list entirely. It can also turn on and off saving each search. By default the function is off (not ticked).

The search statistics collection (bottom frame) is separate to the log. It can be continued even if the log is not used. The control here again can be used to age the statistics or clear them entirely or turn the function on or off.
Overdues Reports

See the Overdues manual for information on the Overdues Reports.