AspenCat Reports - Best Practices

This guide provides information about the reporting feature and how to run reports.

Finding a Report

1. When logged in to the staff side of AspenCat, click on **Reports**.

2. Under the Guided Reports section, click on **Use Saved**.

3. A list of all reports in AspenCat will appear in alphabetical order by the title of the report.

Using Tags to Find a Report

1. Reports may be tagged in one of three ways:
   a. **With a library's branch code.** These reports have been created for a specific library and only provide information for that library's patrons and items.
   b. **With "Any Library."** These reports can be run by any library and prompt the user to enter their branch code.
      IF YOU DON'T KNOW YOUR BRANCH CODE, PLEASE CONTACT ANYONE ON THE ASPENCAT TEAM AT CLiC.
   c. **With an AspenCat team member's first name.** These are created for CLiC staff to do testing.
2. To find reports for a specific tag, simply scroll down until you see the tag on the left side of the screen. Clicking on the tag will limit the report list to only those reports with that tag.
3. See the quick guide "Reports Tags" for more information.

Running a Report

1. Click the **Run** link to the right of the report. You may need to scroll your screen to the right to see the link.
2. The report may run immediately or you may be prompted to enter search parameters, such as your branch code or to/from dates.

Entering Data when Prompted

1. A report may require you to fill in search parameters. The "Any Library" reports are examples of these types of reports.
2. It is important to leave the information in the data boxes and add your search parameters **AFTER THE EQUALS SIGN**.

3. IF YOU DON'T KNOW YOUR BRANCH CODE, PLEASE CONTACT ANYONE ON THE ASPENCAT TEAM AT CLiC.
4. If you are prompted to enter a date, always use the **YYYY-MM-DD format**.
5. If you are prompted for a date range, enter **the day after the last day you want included** in your results.
   a. For example (see above): If you want data for the month of November 2014, the START date will be 2014-11-01 and the END date will be 2014-12-01.
   b. The reason for this is that the system uses midnight as the time of day.
   c. This report will pull data from midnight on November 1st through midnight on December 1st.
6. If you are prompted for other information, like items types or patron types, and are not sure what to enter PLEASE CONTACT ANYONE ON THE ASPENCAT TEAM AT CLiC.

Creating Your Own Reports

1. There are 2 ways to create your own reports:
   a. Guided Reports Wizard
   b. Create from SQL
   c. (The Build New link takes you to the Guided Reports Wizard)
2. The **Guided Reports Wizard** is available if you are not familiar with SQL. The wizard will guide you through several pages of choices.
3. The **Create from SQL** option is available if you are familiar with SQL.
4. Both options are available under the Guided Reports section of the Reports page.

Custom Reports Written for You by the AspenCat Team

1. Feel free to contact anyone on the AspenCat team at CLiC to have a custom report written for you.
2. It is helpful to include the columns you want (patron name, barcode, etc.) in your request.
3. If you have recently migrated to AspenCat, include a sample of the report from your old ILS, if possible.
4. Reports will be created and tagged with your branch code for easy access.