PAT List Users – Brief, Long, and Spreadsheet Formats

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* PAT: List Users.
4. *Click* Setup & Schedule.

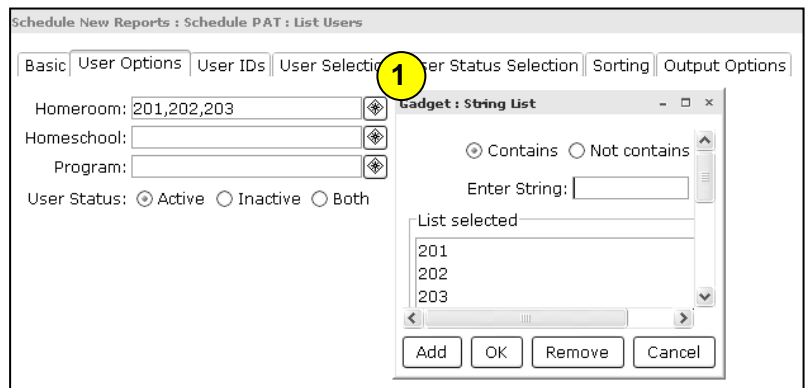| Basic | User Options | User IDs | User Selection | User Status Selection | Sorting | Output Options |

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. 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)

Basic | User Options | User IDs | User Selection | Use

Report name: KAHS students spreadsheet
Description: Open in Excel
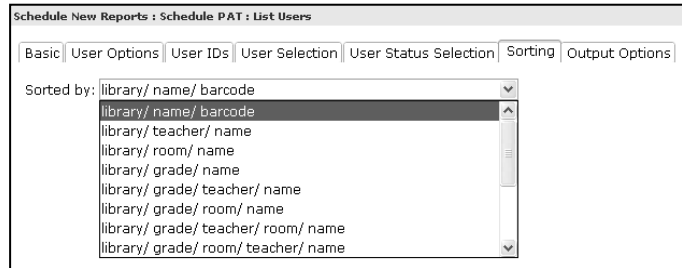Title: List of Patrons 06-07
Footer:

Selection Options

1. **User Options** – specific homerooms, homeschools, or programs can be selected. They must be entered exactly as they appear in patron records. Use the gadget to Enter String.

2. **User IDs –** enter ID numbers to limit output to a specific users.

3. **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported.

4. **User Status Selection –** allows you to limit by user status and/or amount of fines owed.

5. *Use* the gadgets 🔷 to ensure correct formatting of data entry.

Schedule New Reports : Schedule PAT : List Users

Basic | User Options | User IDs | User Selection | User Status Selection | Sorting | Output Options

Homeroom: 201,202,203
Homeschool:
Program:
User Status: ● Active ○ Inactive ○ Both

Gadget : String List

● Contains ○ Not contains

Enter String:

List selected
201
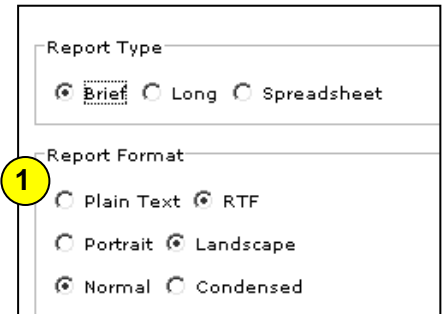202
203

Add | OK | Remove | Cancel

Sorting

1. Use the drop down menu to select the type of sorting.

Output Options Tab – For Brief, Long, or Spreadsheet Formats

Brief Report

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.
2. Only preset information is available for the Brief report.

Sample Brief Report

```
Barcode           Name                    Libr    Created    Room     Teacher    Grade
===================================================================================

21234000070195   HARRIS, DONALD L        ELMHS   20050603   RM 201   DENTON      09
21234000175671   JOHNSTON, STAN L        ELMHS   20050603   RM 201   DENTON      09
21234000153025   LARSON, CHERYL N        ELMHS   20050603   RM 201   DENTON      09
```

Long or Spreadsheet Report

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

2. Check any options you wish to display in your finished report.

3. Advantage of spreadsheet option is ability to open in Excel and sort data as desired.

4. If selecting spreadsheet, be sure to leave the Spreadsheet delimiter Selection on Tab.
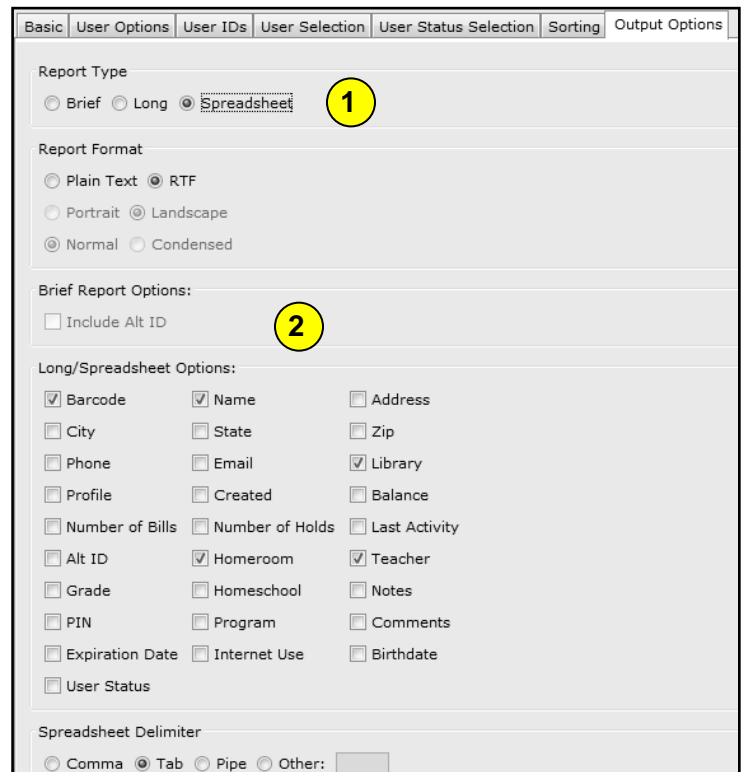
Sample Long Format

```
Barcode          Name                              Libr   Created   Room    Teacher  Grade
=============================================================================================

21234000070195  HARRIS, DONALD L                   ELMHS  20050603  RM 201  DENTON   09
       Address:  42700 BELLAIRE     City:   ELMWOOD              State:   OH
       Zip:      44129              Balance: 20.00               Bills:   2
21234000175671  JOHNSTON, STAN L                    ELMHS  20050603  RM 201  DENTON   09
       Address:  41220 ELYSEE AV    City:   ELMWOOD              State:   OH
       Zip:      44129              Balance: 0.00                Bills:   0
```

Sample Spreadsheet Format

	A	B	C	D	E
1	**Barcode**	**Name**	**Profile**	**Room**	**Teacher**
266	22617000015581	WARNIMONT, BLAINE	STUDENT1	1A-CUPP, JEAN	CUPP, JEAN
267	22617000015599	WEHRI, CASEY	STUDENT1	1A-CUPP, JEAN	CUPP, JEAN
268	22617000015649	KIMMEL, ANGELEA	STUDENT1	1A-CUPP, JEAN	CUPP, JEAN
269	22617000015722	SCHWARTZ, EMILY	STUDENT1	1A-CUPP, JEAN	CUPP, JEAN
270	22617000015755	DUNBAR, JEREMY	STUDENT1	1A-CUPP, JEAN	CUPP, JEAN
271	22617000014535	GAY, TYLER	STUDENT2	1B-KOCH, CHERY	KOCH, CHER
272	22617000015052	BRINKMAN, REBECCA	STUDENT1	1B-KOCH, CHERY	KOCH, CHER
273	22617000015078	BUSS, COURTNEY	STUDENT1	1B-KOCH, CHERY	KOCH, CHER
274	22617000015086	BUSS, KATHRYN (KATEY)	STUDENT1	1B-KOCH, CHERY	KOCH, CHER
275	22617000015094	DUNN, JACOB	STUDENT1	1B-KOCH, CHERY	KOCH, CHER
276	22617000015144	GERDING, VICTORIA (TORI)	STUDENT1	1B-KOCH, CHERY	KOCH, CHER

Running and saving the report

Brief or Long format

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.
7. Your report will open in your pre-selected word processing program.

8. *Customize* the report and/or *save* it if you wish.

Finished Reports : View Finished Reports

Report to view: PAT : List Users

4 ☐ View log

☑ View result

5 ☐ Format report

OK   Change format   Cancel

Spreadsheet format

1. *Run* the report.

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

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

4. *Click* Finished Reports wizard.

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

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

7. When you view the report, it will be in Excel and can easily be manipulated. *Customize* the spreadsheet and/or save it if you wish.
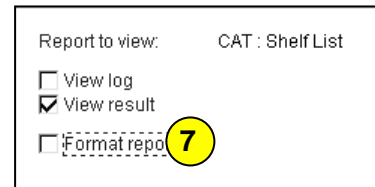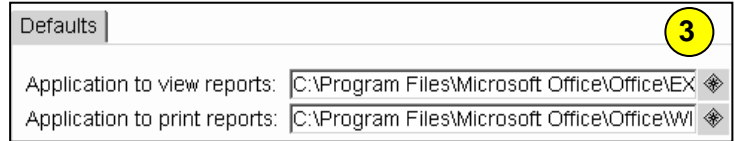
HINT: If your barcode column looks like this: 3.0499+13 you'll need to format the cells.

- *Highlight* the barcode column.
- *Click* Format > Cells.
- On the Number Tab, *select* Number
- *Set* the decimal places to 0.