

# Destiny®

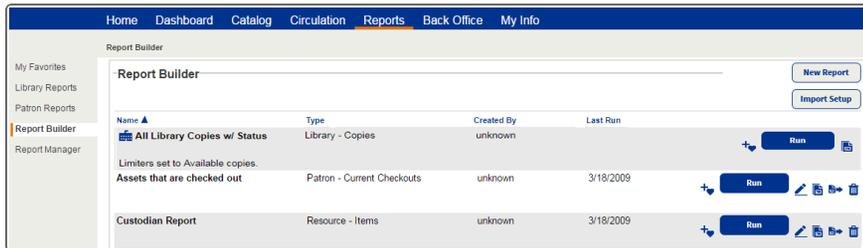
## Creating Custom Reports with Destiny's Report Builder

With Report Builder, you can create a variety of reports. Just choose the information and format you want, and Destiny builds the report for you.

### Building the Report

To access Report Builder:

1. Select **Reports > Report Builder**.
2. Click **New Report**.



3. In the first drop-down, select your report type. Depending on which Destiny product(s) you have, you can choose from the following:
  - Resource
  - General
  - Library
  - Patron



4. From the second drop-down, select a specific topic.
5. Click .

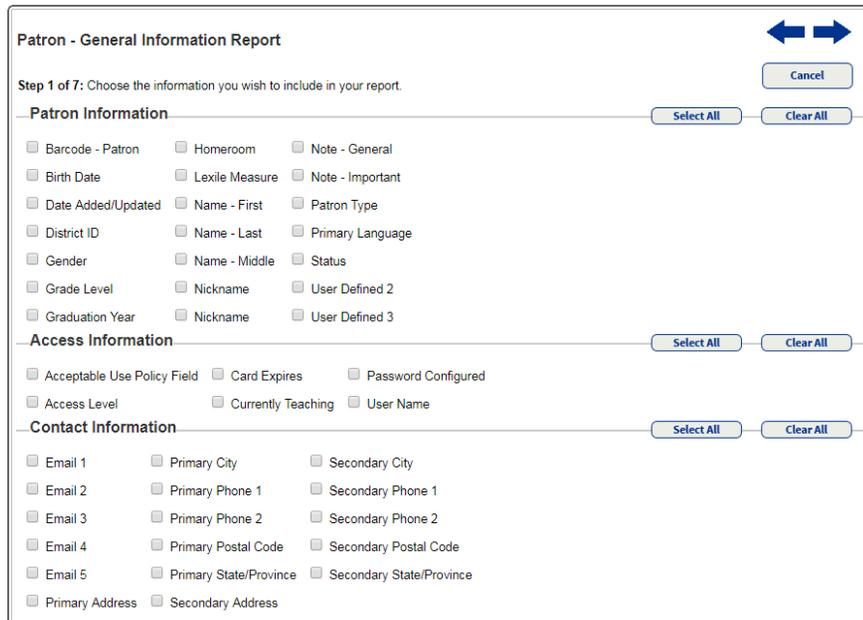
Complete the following steps to build the report. When you complete each step, click  to move to the next step. If you change your mind about any selections, you can return to the previous step by clicking .

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## Step 1: Choosing the information to include in the report

In Step 1, choose which fields to report on. You can select all fields, but you must select at least one field to proceed to the next step.

1. Select the fields you want to include in the report.
2. Click .



Patron - General Information Report

Step 1 of 7: Choose the information you wish to include in your report.

Patron Information

- Barcode - Patron
- Birth Date
- Date Added/Updated
- District ID
- Gender
- Grade Level
- Graduation Year

Access Information

- Acceptable Use Policy Field
- Access Level

Contact Information

- Email 1
- Email 2
- Email 3
- Email 4
- Email 5
- Primary Address

## Step 2: Grouping the information

In Step 2, you can arrange the information selected in Step 1 into groups. Grouping is not required, but it helps make your report easier to understand. If you just need a simple list of statistics, you might decide not to group the information.

1. In the first **Group by** drop-down, select your primary grouping option.
2. In the second **Group by** drop-down, choose whether the information should be in ascending or descending order.
3. If you selected more than one field in Step 1, you can select a second field from the **...then by** drop-down and a third in the **...and finally by** drop-down; then choose an ascending or descending order.
4. Click .



Patron - General Information Report

Step 2 of 7: Indicate how you want the information in your report to be grouped.

Report Grouping Levels

Group by -- None -- Ascending

...then by -- None -- Ascending

...and finally by -- None -- Ascending

## Step 3: Arranging the columns

Step 3 lets you set the order of the remaining fields in your report. The fields in this step display as columns from left to right. The field at the top of the list is the first column on the left. By default, the remaining fields are arranged alphabetically in columns.

1. Select a field, and then click **Move to Top**, **Move Up**, **Move Down** or **Move to Bottom**.

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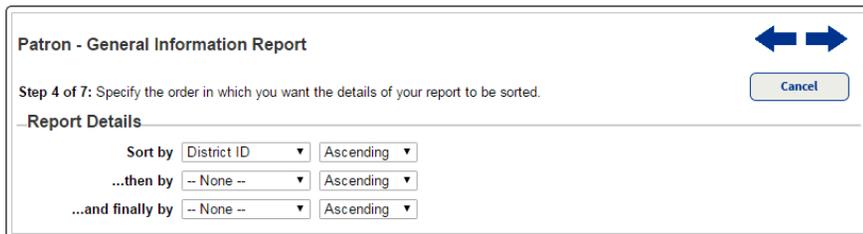
- Once you arrange the information in the way you want, click  to go to the next step.



## Step 4: Sorting the information

In Step 4, you can specify the sort order for the information in each of the report's columns. The fields available to you in this step are the fields you selected in Step 1, excluding the fields you grouped by in Step 2. By default, reports sort in ascending order.

- Select the primary sorting option from the **Sort by** drop-down.



- In the drop-down next to **Sort by**, choose whether the information should be in ascending or descending order.

- If you selected more than one field in Step 1, you can select a second field from the **...then by** drop-down and a third in the **...and finally by** drop-down; then choose an ascending or descending order.
- Click .

## Step 5: Summarizing the information

Step 5 lets you perform calculations on any numeric fields or count records in your report. The options you select appear at the end of the report and at the bottom of each primary group column.

To indicate how you want the information in the report summarized:

- Select the appropriate checkboxes from the following options:

Checkbox	Description
<b>Count</b>	Provides either an overall count of records in your report or a count of each specified field group.
<b>Total</b>	Calculates the total sum of records in the report.
<b>Average</b>	Calculates the total value of entries in a column divided by the number of entries in that column.
<b>Smallest Value</b>	Presents the lowest value of a given column.
<b>Largest Value</b>	Presents the largest value of a given column.

- Click .

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## Step 6: Limiting the information

Step 6 helps give your report more focus by limiting for selected criteria. For example, if you are running a patron report, you can limit it to patrons added/updated within a date range. You can set up to 10 limiters.

1. From the first drop-down, select a limiter. An operator list and a value option for the selected field appear. For example, when you select Date Added/Updated, the operator list for limiting the date range and a value field for choosing the date appears.
2. In the **Operator** drop-down, select an operator.
3. In the **Value** field, type a value.
4. In the drop-down next to the value field, select one of the following:
  - **AND:** Includes all records that meet every limiter
  - **OR:** Includes all records that meet at least one of the limiters
5. Repeat the previous steps to add any additional limiters. You can set up to 10.
6. Click .

## Step 7: Saving the report

In Step 7, you can run and save the report setup for later use.

1. In the **Name** field, type a name for the report.
2. In the **Description** field, you can type notes about the report.
3. There are two options for saving the report:
  - To save the report and run it immediately, click **Save & Run**.
  - To save the report setup for later use, click **Save**.

4. If you selected **Save & Run** in the previous step, Report Manager displays your report at the top of the list and automatically updates its status. When the status is **Completed**, do one of the following:
  - To view the job summary, select **View**
  - To view your report online, select **Report**.
  - To download the report as an XML file, which can be exported into Microsoft Excel, select **XML File**.
  - To open or save a spreadsheet file in Excel, select **Excel® File**.