KOHA: Reports

More > Report

Top lists
- Patrons checking out the most
- Most-circulated items

Inactive
- Patrons who haven't checked out
- Items with no checkouts

Other
- Items lost
- Catalog by item type
- Average loan time
- Koha database schema
- Koha reports library
KOHA: Reports

- **Reports in Koha are a way to gather data**

- **Reports are used to generate statistics, member lists, shelving lists, or any list of data in your database**
KOHA: Reports

- Custom Reports
- Circulation Reports
- Statistics Reports
- Reports Dictionary
KOHA: Reports
Add Custom Report

- Koha’s data is stored in a MySQL database which means that librarians can generate nearly any report they would like by either using the Guided Reports Wizard or writing their own SQL query

- The guided report wizard will walk you through a six step process to generate a report
KOHA: Reports
Add Custom Report

- Step 1: Choose the module you want to report on. This will determine what tables and fields are available for you to query.
KOHA: Reports
Add Custom Report

Step 2: Choose a report type. For now, Tabular is the only option available
KOHA: Reports
Add Custom Report

Step 3: Choose the fields you want in your report. You can select multiple fields and add them all at once by using CTRL+Click on each item you want to add before clicking.
KOHA: Reports
Add Custom Report

- **Step 4:** Choose any limits you might want to apply to your report (such as item types or branches)
- If you don’t want to apply any limits, simply click Next instead of making an option.
Step 5: Perform math functions. If you don’t want to do any calculations, simply click Next instead of making an option.
KOHA: Reports
Add Custom Report

Step 6: Choose data order. If you want the data to print out in the order it’s found in the database, simply click Finish.
KOHA: Reports

Add Custom Report- Finished

- When you are finished you will be presented with the SQL generated by the report wizard
- From here you can choose to save the report by clicking ‘Save’ or copy the SQL and make edits to it by hand.

Confirm custom report

Your report will be generated with the following SQL statement.
SELECT borrowers.surname,borrowers.firstname FROM borrowers
You will need to save the report before you can execute it
If you choose to save the report you will be asked to name your report and enter any notes regarding it.
KOHA: Reports

Add Custom Report - Finished

- Once your report is saved it will appear on the ’Use Saved’ page with all other saved reports.
Every report can be edited from the reports lists. To see the list of reports already stored in Koha, click ‘Use Saved’.

You can sort the reports by clicking on the column header. You can also filter your results using the filter menu on the left.
From this list you can edit any custom report by clicking 'Edit SQL'.
KOHA: Reports

Running Custom Report

- Once custom reports are saved to Koha, you can run them by going to the Saved Reports page and clicking the Run link to the right of the report.

- When you report runs you will either be asked for some values.

Enter parameters for report New Patrons:

- Month enrolled (mm):
- Year enrolled (yyyy):

Run the report
KOHA: Reports

Running Custom Report

- **or you will see the results right away**

**New Patrons**

Will ask for month and year

Total number of rows matching the (unlimited) query is 3.

SELECT branchcode, categorycode, COUNT(*)
FROM borrowers WHERE MONTH(dateenrolled) = '02' AND YEAR(dateenrolled) = '2011'
GROUP BY branchcode, categorycode
ORDER BY branchcode

<table>
<thead>
<tr>
<th>branchcode</th>
<th>categorycode</th>
<th>COUNT(*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FFL</td>
<td>J</td>
<td>2</td>
</tr>
<tr>
<td>NIC</td>
<td>PT</td>
<td>1</td>
</tr>
<tr>
<td>NIC</td>
<td>S</td>
<td>1</td>
</tr>
</tbody>
</table>

**Note:** A Comma separated text (CSV) file can be opened by any spreadsheet application.
KOHA: Reports
Some Examples of SQL for Custom Reports

- Books added in the past 30 days, not including any with a Not for Loan status of On Order (helpful for creating a New Books List)

```
SELECT items.dateaccessioned, items.itemcallnumber, biblio.title, biblio.author
FROM items
LEFT JOIN biblio
ON (items.biblionumber = biblio.biblionumber)
WHERE items.itype = 'BOOK' AND DATE_SUB(CURDATE(), INTERVAL 30 DAY) <= items.dateaccessioned
AND items.location = "NEW" AND items.notforloan != -1
ORDER BY biblio.title asc
```
Books On Order

```
SELECT items.dateaccessioned, items.itemcallnumber, biblio.title, biblio.author FROM items LEFT JOIN biblio on (items.biblionumber=biblio.biblionumber) WHERE items.itype='BOOK' and items.notforloan = -1 ORDER BY biblio.title asc
```
KOHA: Reports
Some Examples of SQL for Custom Reports

- Overdues -- 2 weeks

```sql
SELECT borrowers.surname, borrowers.firstname, borrowers.email, borrowers.phone,
borrowers.guarantorid, issues.date_due, (TO_DAYS(cur
date())-TO_DAYS(date_due)) AS 'days_overdue',
items.itemcallnumber, items.barcode, biblio.title, biblio.
author
FROM borrowers JOIN issues ON (borrowers.borroweru
umber=issues.borrowernumber)
JOIN items ON (issues.itemnumber=items.itemnumber)
JOIN biblio ON (items.biblionumber=biblio.biblionumber)
HAVING days_overdue between 14 and 20 ORDER BY
borrowers.surname, issues.date_due
```
KOHA: Reports
Some Examples of SQL for Custom Reports

- **Overdues -- 6 weeks**

```sql
SELECT borrowers.surname, borrowers.firstname, borrowers.cardnumber, borrowers.email, borrowers.phone, borrowers.guarantorid, issues.date_due, (TO_DAYS(curdate())-TO_DAYS(date_due)) AS 'days overdue', items.itemcallnumber, items.barcode, biblio.title, biblio.author
FROM borrowers JOIN issues ON (borrowers.borrowernumber=issues.borrowernumber) JOIN items ON (issues.itemnumber=items.itemnumber) JOIN biblio ON (items.biblionumber=biblio.biblionumber)
WHERE (TO_DAYS(curdate())-TO_DAYS(date_due)) between 42 and 48 ORDER BY borrowers.surname, issues.date_due
```
KOHA: Reports

Some Examples of SQL for Custom Reports

- **Overdues with holds**

```sql
SELECT borrowers.surname, borrowers.firstname, borrowers.phone, borrowers.phonepro, issues.date_due, items.itemcallnumber, items.barcode, biblio.title, CONCAT('<a href="/cgi-bin/koha/circ/circulation.pl?borrowernumber=', reserves.borrowernumber, '">', reserves.borrowernumber, '</a>') AS 'On hold for' FROM issues LEFT JOIN borrowers ON (borrowers.borrowernumber=issues.borrowernumber) LEFT JOIN items ON (issues.itemnumber=items.itemnumber) LEFT JOIN biblio ON (items.biblionumber=biblio.biblionumber) LEFT JOIN reserves ON (items.biblionumber=reserves.biblionumber) WHERE items.biblionumber=reserves.biblionumber AND (TO_DAYS(curdate())-TO_DAYS(date_due)) >= '1' ORDER BY issues.date_due asc, borrowers.surname ASC
```
KOHA: Reports

- Custom Reports
- **Circulation Reports**
- Statistics Reports
- Reports Dictionary
Most reports can be found via the Reports module, but some of the more common circulation reports are available right from the Circulation module:

- Circulation > Circulation reports
- Holds Queue
- Holds to pull
- Holds awaiting pickup
- Hold ratios
- Overdues
KOHA: Reports
Holds Queue

- This report will show you all of the holds at your library
- To generate this report, you must have the Build Holds Queue cron job running. This cron job is a script that should be run periodically if your library system allows borrowers to place on-shelf holds
- This script decides which library should be responsible for fulfilling a given hold request
# KOHA: Reports

## Holds Queue

<table>
<thead>
<tr>
<th>Title</th>
<th>Collection</th>
<th>Call Number</th>
<th>Barcode</th>
<th>Patron</th>
<th>Send To</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Sepulchre</em></td>
<td>AUDIobook COM FIC MOSSE</td>
<td>Any available copy</td>
<td>Sutton, Robin (22373000072368)</td>
<td>802-253-5104</td>
<td>SFL</td>
<td>09/24/2009</td>
</tr>
<tr>
<td><em>Uncrowned king:</em></td>
<td>BIO B ALBERT</td>
<td>Any available copy</td>
<td>Testfamily, Kid (2345)</td>
<td></td>
<td>SFL</td>
<td>10/19/2009</td>
</tr>
<tr>
<td><em>The lost:</em></td>
<td>BIO B MENDELSON</td>
<td>Any available copy</td>
<td>Malator, Ilse (22373000012042)</td>
<td>(802)253-4801</td>
<td>SFL</td>
<td>09/22/2009</td>
</tr>
<tr>
<td><em>Red and me:</em></td>
<td>BIO B RUSSELL</td>
<td>Any available copy</td>
<td>FIX, CATALOG (22373000130018)</td>
<td></td>
<td>SFL</td>
<td>09/24/2009</td>
</tr>
<tr>
<td><em>Mosse, Kate,</em> Penguin Audio, , 2008 : 16 sound discs (20 hr., 30 min.): 4 3/4 in. ISBN: 9780143143178</td>
<td>0143143174 :</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This report will show you all of the items that have holds on them that are available at the library for pulling.

You can limit the results you see by using the Refine box on the left side of the page.
# KOHA: Reports

## Holds to Pull

### Pending holds placed between 12/01/2008 and 12/16/2009

Reported on 12/16/2009

The following holds have not been filled. Please retrieve them and check them in.

<table>
<thead>
<tr>
<th>Pull This Many Items</th>
<th>Items Available</th>
<th>Patrons with Holds</th>
<th>Title</th>
<th>Libraries</th>
<th>Available Call Numbers</th>
<th>Available Types</th>
<th>Available Locations</th>
<th>Earliest Hold Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>2</td>
<td>The Hunger Games /</td>
<td>SFL</td>
<td>TEE COL</td>
<td>BOOK</td>
<td>TEEN</td>
<td>09/22/2009 in SFL</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>2</td>
<td>Eclipse /</td>
<td>SFL</td>
<td>TEE MEY</td>
<td>BOOK</td>
<td>TEEN</td>
<td>09/22/2009 in SFL</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Mad men, Season 1, disc 3</td>
<td>SFL</td>
<td>DVD MAD</td>
<td>FILM</td>
<td>DVD</td>
<td>09/24/2009 in SFL</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Monarch of the Glen, Season 5, disc 1</td>
<td>SFL</td>
<td>DVD MONARCH</td>
<td>FILM</td>
<td>DVD</td>
<td>09/28/2009 in SFL</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Monarch of the Glen, Season 5, disc 2</td>
<td>SFL</td>
<td>DVD MONARCH</td>
<td>FILM</td>
<td>DVD</td>
<td>09/28/2009 in SFL</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Monarch of the Glen, Season 5, disc 3</td>
<td>SFL</td>
<td>DVD MONARCH</td>
<td>FILM</td>
<td>DVD</td>
<td>09/28/2009 in SFL</td>
</tr>
</tbody>
</table>

### Refine Results

Start date: 12/14/2009

End date: 12/16/2009

(Inclusive, default is two days ago to today, set other date ranges as needed.)

Submit
This report will show all of the holds that are waiting for patrons to pick them up.

<table>
<thead>
<tr>
<th>Available since</th>
<th>Title</th>
<th>Patron</th>
<th>Location</th>
<th>Copy number</th>
<th>Enumeration</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/23/2012</td>
<td>About a boy / (Books)</td>
<td>Acevedo, Henry</td>
<td>NIC</td>
<td>PR6058.O689</td>
<td>A64 1998</td>
<td>Cancel hold</td>
</tr>
</tbody>
</table>
KOHA: Reports

Holds ratios

- Hold ratios help with collection development
- Using this report you will be able to see how many of your patrons have holds on items and whether you should buy more. (By default it will be set to the library needing 3 items per hold that has been placed)
- The report will tell you how many additional items need to be purchased to meet this quota
## Hold Ratios to Calculate Items Needed

**Calculated on 12/16/2009. From 12/16/2008 to 12/16/2009**

These items have a hold ratio ≥ 3.

<table>
<thead>
<tr>
<th>Reserves</th>
<th>Items</th>
<th>Hold Ratio</th>
<th>Title</th>
<th>Holding Libraries</th>
<th>Location</th>
<th>Itype</th>
<th>Call Numbers</th>
<th>Items Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>3.00</td>
<td>A gate at the stairs :</td>
<td>SFL</td>
<td>FIC</td>
<td>BOOK</td>
<td>FIC MOORE</td>
<td>1 to order</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>4.00</td>
<td>Alex Cross's trial /</td>
<td>SFL</td>
<td>FIC</td>
<td>BOOK</td>
<td>FIC PATTERSON</td>
<td>1 to order</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>4.00</td>
<td>The defector l</td>
<td>SFL</td>
<td>FIC</td>
<td>BOOK</td>
<td>FIC SILVA</td>
<td>1 to order</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>5.00</td>
<td>The elegance of the hedgehog / &quot;French Voices&quot;--P. 4 of cover.</td>
<td>SFL</td>
<td>FIC</td>
<td>BOOK</td>
<td>FIC BARBERY</td>
<td>1 to order</td>
</tr>
<tr>
<td>6</td>
<td>2</td>
<td>3.00</td>
<td>Catching fire l</td>
<td>SFL</td>
<td>TEEN</td>
<td>BOOK</td>
<td>TEE COL</td>
<td>1 to order</td>
</tr>
<tr>
<td>6</td>
<td>1</td>
<td>6.00</td>
<td>True compass :</td>
<td>SFL</td>
<td></td>
<td>BOOK</td>
<td>B KENNEDY</td>
<td>2 to order</td>
</tr>
</tbody>
</table>
This report will list all items that are overdue at your library.

For libraries with a large patron base, this report may take a significant amount of time to run.

Large libraries can choose to filter the report before it runs by setting the FilterBeforeOver-dueReport system preference to ’Require’.

The report can be filtered using the menu options found on the left of the report.
KOHA: Reports
Overdues

<table>
<thead>
<tr>
<th>Due date</th>
<th>Patron</th>
<th>Library</th>
<th>Title</th>
<th>Barcode</th>
<th>Call number</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/28/2011 00:00</td>
<td>Charles Lisa ((212) 555-1212)</td>
<td>MPL</td>
<td><em>Fool Moon (The Dresden Files, Book 2)</em>, by Butcher, Jim.</td>
<td>60479690</td>
<td></td>
</tr>
<tr>
<td>03/30/2012 23:59</td>
<td>Engard Coda [email] (555.111.2345)</td>
<td>FFL</td>
<td><em>My sister's keeper</em>, by Picoult, Jodi,</td>
<td>100002</td>
<td>PS3566.i372 M9 2005</td>
</tr>
<tr>
<td>06/29/2012 23:59</td>
<td>Engard Brian [email] (555.111.2345)</td>
<td>NIC</td>
<td><em>An education</em>, by Homby, Nick.</td>
<td>72387022</td>
<td></td>
</tr>
<tr>
<td>07/03/2012 23:59</td>
<td>Engard Beau [email] (555.111.2345)</td>
<td>FFL</td>
<td><em>Audiovisual librarianship</em>, by Shores, Louis,</td>
<td>31619000163907</td>
<td>Z717 .S47</td>
</tr>
<tr>
<td>07/09/2012 23:59</td>
<td>Engard Brian [email] (555.111.2345)</td>
<td>NIC</td>
<td><em>The tenth circle</em>, by Picoult, Jodi,</td>
<td>100001</td>
<td>PS3566.i372 T46 2006b</td>
</tr>
<tr>
<td>08/24/2012 23:59</td>
<td>Cherry Lillie ((212) 555-1212)</td>
<td>MPL</td>
<td><em>The tenth circle</em>, by Picoult, Jodi,</td>
<td>323212</td>
<td>PS3566.i372 T46 2006b</td>
</tr>
<tr>
<td>10/13/2012 00:00</td>
<td>Schneider Nicole ((212) 555-1212)</td>
<td>FRL</td>
<td><em>Library mashups</em></td>
<td>3160778983</td>
<td>Z674.75.W67 L52 2009</td>
</tr>
</tbody>
</table>
KOHA: Reports

- Custom Reports
- Circulation Reports
- **Statistics Reports**
- Reports Dictionary
KOHA: Reports

- Statistic reports will show you counts and sums. These reports are all about numbers and statistics, for reports that return more detailed data, use the Guided Report Wizard

- These reports are limited in what data they can look at, so it’s often recommended to use custom reports for official end of the year statistics
KOHA: Reports
Acquisitions Statistics

- Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.
KOHA: Reports

Acquisitions Statistics

- If you choose to output to the browser your results will print to the screen.

<table>
<thead>
<tr>
<th>Acquisitions statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>aqbooksellers.name / aqbudgets.budget_code</td>
</tr>
<tr>
<td>Baker &amp; Taylor</td>
</tr>
<tr>
<td>Borders</td>
</tr>
</tbody>
</table>

| TOTAL                    | 8     | 5   | 9   | 22    |

- You can also choose to export to a file that you can manipulate to your needs.
- When generating your report, note that you get to choose between counting or summing the values.
Choosing amount will change your results to appear as the sum of the amounts spent

<table>
<thead>
<tr>
<th>aqbooksellers.name / aqbudgets.budget_code</th>
<th>CHILD</th>
<th>GEN</th>
<th>REF</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baker &amp; Taylor</td>
<td>24.98</td>
<td>365.1</td>
<td></td>
<td>390.08</td>
</tr>
<tr>
<td>Borders</td>
<td>80</td>
<td>66.99</td>
<td>365.1</td>
<td>146.99</td>
</tr>
<tr>
<td>TOTAL</td>
<td>80</td>
<td>91.97</td>
<td>365.1</td>
<td>537.07</td>
</tr>
</tbody>
</table>
Choosing amount will change your results to appear as the sum of the amounts spent.
KOHA: Reports
Patron Statistics

- If you choose to output to the browser your results will print to the screen
- Based on your selections, you may see some query information above your results table. You can also choose to export to a file that you can manipulate to your needs
KOHA: Reports
Catalog Statistics

- **Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row**

- **Based on your selections, you may see some query information above your results table. You can also choose to export to a file**
KOHA: Reports
Catalog Statistics

- If you choose to output to the browser your results will print to the screen
  - You can also choose to export to a file that you can manipulate to your needs

<table>
<thead>
<tr>
<th>Catalog statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>items.itype / items.homebranch</td>
</tr>
<tr>
<td>--------------------------</td>
</tr>
<tr>
<td>BK</td>
</tr>
<tr>
<td>CR</td>
</tr>
<tr>
<td>Donated by</td>
</tr>
<tr>
<td>MU</td>
</tr>
<tr>
<td>REF</td>
</tr>
<tr>
<td>REF-BK</td>
</tr>
<tr>
<td>VID</td>
</tr>
<tr>
<td>VM</td>
</tr>
<tr>
<td>NULL</td>
</tr>
<tr>
<td>TOTAL</td>
</tr>
</tbody>
</table>
KOHA: Reports
Serial Statistics

Using the form provided, choose how you would like to list the serials in your system

Based on your selections, you may see some query information above your results table. You can also choose to export to a file that you can manipulate to your needs.
If you choose to output to the browser your results will print to the screen.

- You can also choose to export to a file that you can manipulate to your needs.

<table>
<thead>
<tr>
<th>Serials subscriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bookseller</strong></td>
</tr>
<tr>
<td>Computers in libraries.</td>
</tr>
<tr>
<td>Computers in libraries.</td>
</tr>
<tr>
<td>Baker &amp; Taylor</td>
</tr>
</tbody>
</table>

KOHRA: Reports
Serial Statistics
KOHA: Reports

Other Statistics Reports

- As above, generate various Statistics Reports (like Acquisitions, Patron, Catalog, Serial), same way generate other Statistics Reports as Circulation Statistics, Holds Statistics, Patrons with the most checkouts, Most Circulated Items, Patrons with no checkouts, Average Loan Time etc.
KOHA: Reports

- Custom Reports
- Circulation Reports
- Statistics Reports

Reports Dictionary
KOHA: Reports Dictionary

- The report dictionary is a way to pre-define common filters you’d like to apply to your reports

- This is a good way to add in filters that the report wizard doesn’t include by default
To add a new definition, or filter, click ‘New Definition’ on the Reports Dictionary page and follow the 4 step process:

Step 1: Name the definition and provide a description if necessary.
KOHA: Reports
Add a new definition

- **Step 2:** Choose the module that the will be queried.

- **Step 3:** Choose columns to query from the tables presented.
KOHA: Reports

Add a new definition

Add New Definition

Step 3 of 5: Choose columns

- items.stocknumber
- biblioteams
  - Biblio Item Number
  - Biblio Number
  - Volume Number
  - Number
  - Biblio-level Item Type
  - ISBN
  - ISSN
  - Publication Date
- Publisher
  - Volume Date
  - biblioteams.volumedesc
  - biblioteams.collectiontitle
  - biblioteams.collectionissn
  - biblioteams.collectionvolume
  - biblioteams.editionstatement
  - biblioteams.editionresponsibility
  - Timestamp
  - Illustrator

Next
KOHA: Reports
Add a new definition

- **Step 4: Choose the value(s) from the field(s). These will be automatically populated with options available in your database**
KOHA: Reports
Add a new definition

- Confirm your selections to save the definition

- Your definitions will all appear on the Reports Dictionary
Thanks