

Generate a Title & Copy List (Library Manager)

The Title & Copy List lets you create collection reports based on title, circulation type (not available for district media centers), copy category, date added/updated, or a Resource List. You can show titles with copies in a specific status, such as available, checked out, lost, on hold, or on order.

The reported information can be as broad or as narrow as you want it to be. It can include just a list of titles, or all the titles and copies you have.

Create a New Report

1. Select **Reports > Library Reports**.
2. Under **Catalog -- Titles & Copies**, click **Title & Copy List**.
3. (Optional) If you log in to the district, select either the district or an individual library from the **For** drop-down.

Notes:

- Only a [district-level user](#) with *Manage Library Materials for the District* or *Create Reports for the District* permissions can create a district-level report.
- If you select the district, the report is limited to the first 10,000 qualifying titles and copies.


4. Click the **Select By** drop-down, and select a method for identifying the titles to include in the list.
 - If you select **Title**, enter a range in the **from** and **to** fields and next to the **Select By** drop-down.

Notes:

- If you leave both **from** and **to** fields blank, the report includes all titles.
- If you leave the **from** field blank and enter a name in the **to** field, the report includes all those up to and including the title entered.
- If you enter a name in the **from** field and leave the **to** field blank, the report includes that name and all those after it.
- If you enter the same name in both fields, the report is limited to that one name.
- You cannot use wild cards (?, *) in ranges.
- If you are running a report on a specific title in Textbook Manager, make sure to enter the name of the primary textbook, not the supplement.

- If you select **Circulation Type** or **Category**, select one or all from the **Include** list.
 - For one **Circulation Type**, the report includes copy information for only those copies of that Circulation Type.
 - For **Categories**, the report includes copy information for only those copies assigned to those categories.

Note: If you are running the report by category for the district, note that the **Include** list is limited to district-only categories. For a school report, the list is limited to categories specific to the school.

- If you select **Date Title Added**, **Date Title Updated** or **Date Copies Added**, select the date range:
 - a. Select the **After the Date**, **On the Date** or **Before the date** from the drop-down next to your date type selection.
 - b. Enter a date in the next field, or click the calendar icon, , to select from the calendar.
 - If you select **List**, select the [Library Materials Resource List](#) you want to use for the report. To review the contents of a list, click **View List**.
5. To include itemized copy information in the list, select one of the options with copies in the **Show Titles** drop-down.

Notes:

- If you select to include any copies, you can also select to include the category names, circulation statistics, or both, in the itemized copy information.
- A [district-level user](#) with *Manage Library Materials for the District* permissions can include both the district and school categories for each copy.

Example: A user selects **With "lost" copies** in the **Show Titles** field to see the **Include** options.

The screenshot shows a web interface for configuring a report. At the top right, there are two tabs: 'Create New Report' (highlighted in orange) and 'Saved Reports'. Below the tabs is the title 'List library titles & copies....'. The interface is divided into several sections by horizontal lines. The first section is 'Select By', with a dropdown menu set to 'Title', followed by 'from' and 'to' text boxes. The second section is 'Show Titles', with a dropdown menu set to 'With "lost" copies'. Below this is an 'Include' section with two checkboxes: 'Categories' and 'Circulation statistics', both of which are currently unchecked. The third section is 'Output as', with a dropdown menu set to 'PDF'. At the bottom of the form are two blue buttons: 'Save Setup' and 'Run Report'.

6. (Optional) If you included circulation statistics, you can then limit the report to copies that circulated a certain number of times:
- a. Select the **Only show copies that circulated** checkbox.
 - b. Select **More than**, **Equal to** or **Less than** from the drop-down.
 - c. Enter the number of circulations required for the copy to appear in the report.
 - d. Select the time period: **This month**, **This [statistical] year** or **Total** (since you installed Destiny).

Create New Report | Saved Reports

List library titles & copies....

Select By Title ▼ from to

Show Titles With "lost" copies ▼

Include Categories
 Circulation statistics
 Only show copies that circulated

More than ▼ This month ▼

Output as PDF ▼

Save Setup Run Report

7. Select a report format from the **Output as** drop-down:

- To generate the report in Adobe® PDF format, select **PDF**.
- To generate the report in Microsoft® Excel® format, select **Microsoft Excel**.

8. To run the report now, click **Run Report**.

To save the setup, click **Save Setup**. A Save Report page appears:

- Enter a name that is unique for the report at your library.
- Click either **Save**, to save the report, or **Save and Run**, to save the report and run it now.

▣ Work With Saved Reports

Additional Details

After setting up your report, you can save it. When you save a report setup, it appears on the **Saved Reports** tab. From there, you can run it later, edit it, duplicate it or delete it. Each time you run the report, the results reflect the current contents of your collection. The report includes the following:

- ▣ **Title Information**
- ▣ **Copy Information**
- ▣ **Copy Details**
- ▣ **List Totals**
- ▣ **Sort Order**
- ▣ **Report Uses**

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