

Generate a Title and Copy List

The *Title and 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.

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.

You can determine which copies have been checked out, examine lists of lost copies, or print title lists based on circulation type, copy category, or circulation statistics. You can discover the titles that have no copies or those that have new copies.

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.

How do I create the list I need?

To generate the list

1. Open *Library* or *Media* in *Reports* and select **Title & Copy List**.
2. If you are a district materials manager or reports creator, select either the district or an individual library from the *For* list.

Note If you select the district, the report is limited to the first 10,000 qualifying titles and copies.

3. In the *Select by* list, select a method for identifying the titles to include in the list.
 - If you select **Title**, you will have two boxes in which to specify the title range:
 - You can leave both boxes blank to include all titles.
 - If you leave the *from* box blank and enter a title in the *to* box, the report includes all those up to and including the title in the *to* box.
 - If you enter a title in the *from* box and leave the *to* box blank, the report includes that title and all those after it.
 - If you enter the same title in both boxes, the report is limited to that one title.
 - Please note that Destiny® does not support the use of wildcards (?, *) in ranges.
 - 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 one or all Categories, the report includes copy information for only those copies assigned to that category or those categories. If you are running the report by category for the district, please 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**, you will need to specify the date range:
 - Select the phrase from the list.
 - Enter a date. Click the calendar icon for a calendar.
 - If you select **List**, select the Resource List you want to use for the report. To review the contents of the List, click **View List**.
4. To include itemized copy information in the list, select one of the options with copies in the *Show Titles* list.
5. If you select to include any copies, you can select one or more check boxes to include the category names, circulation statistics, or both, in the itemized copy information. As a district cataloger, you can include both the district and school categories for each copy.
6. If you select to include 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** check box.
 - b. Select More than, Equal to, or Less than.
 - 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 since you installed Destiny.
7. Select a report format from the *Output as* list.
 - 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** and enter a name for the report. You must select a name that is unique for the report at your library. Then, click either **Save**, to save the report, or **Save and Run**, to save the report and run it now.

How do I work with saved title and copy lists?

When saving your Title & Copy List report setup, you may need to pay special attention to some of the settings. These depend on the option you selected in *Select by*:

- **Resource List:** When you create and save a report setup based on a Resource List:
 - While editing the report setup, other users can view your Resource List.
 - If you delete the Resource List, you cannot run the report again until you select another Resource List.
- **Date:** When you run a saved report with a date limiter, Destiny again displays the saved date and reminds you to change it.
- **Circulation Type:** If you save a report based on a Circulation Type and then delete the Circulation Type, you cannot run the report again until you select another Circulation Type.
- **Category:** If you save a report based on a Category and then delete the Category, you cannot run the report again until you select another Category.

Once you save the report setup, it appears on the *Saved Reports* tab, where you have more options for working with it:

- **Add to Favorites:** Click the Add to Favorites icon to add a Saved Report to your My Favorites list. Saved Reports already in your My Favorites list are designated with a Favorite icon.
- **Run:** Click **Run** to run the report. Each time you run the report, the results reflect the current contents of your collection. Other users with permission to run reports can also run your Saved Reports.
- **Edit:** Click the edit icon to edit the report. When you edit a saved report setup and re-save it (even with a different name), the original report setup is overwritten.
- **Duplicate:** Click the duplicate icon to duplicate an existing Saved Report. This is a quick way to create one or more additional Saved Reports based on the configuration of the original Saved Reports.
- **Delete:** Click the delete icon to delete the report. Destiny notifies you if the report is a favorite of any other users. When you delete a Saved Report, previous reports from the Saved Report are not deleted from the Report Manager.

What information does the list include?

For each included title, the list includes the following title information:

- Call number of the copy

NOTE If a title has copies with different call numbers, the title is listed under each call number.

- Title
- Material type
- Author
- ISBN
- LCCN

and summary copy information:

- Total number of copies with that call number
- Number of copies available
- Number of copies checked out
- Number of copies on hold
- Number of copies loaned out
- Number of copies on order
- Number of copies out for repairs
- Number of copies in transit
- Number of copies lost

If you select one of the *Show Titles* options that includes copies, the report includes information on each copy meeting the criteria, grouped by Status:

- Its barcode number
- Its price
- If a copy is checked out, it lists the borrower's name, patron type, barcode number, and the due date.
- If the copy is lost, it includes the date it was lost.
- Its categories (if you selected the *Include categories* check box)
- The number of circulations for this month, this [statistical] year, and the total (if you selected the **Circulation statistics** check box)

The *List Totals* at the bottom include the following information:

- Number of titles listed
- Total number of copies
- Total number of copies available
- Total number of copies checked out
- Total number of copies on hold
- Total number of copies loaned out

- Total number of copies on order
- Total number of copies out for repairs
- Total number of copies in transit
- Total number of copies lost

NOTES

If you selected **Category** at the top, the list does not include any totals.

If a title has copies that have different call numbers, the title appears on the list more than once; there is an entry at each call number. Each entry contains copy information for only those copies with *that* call number.

How is the list sorted?

The sort order depends on the criterion you chose in the *Select by* list.

If you selected **Title**, **Date Title Added**, **Date Title Updated**, **Date Copies Added**, or **List**, the list is in call number/author/title order.

If you selected **Circulation Type** or **Category**, the list is first sorted by the circulation type or category, then by call number/author/title.

If you selected **Titles only**, titles without any copies (and thus, call numbers) are listed at the top of the report. The titles with copies follow those.

If you included copy information, copies are grouped by Status (Available, Checked Out, Loaned Out, On Order, Out for Repairs, Lost, and On Hold).

How can I use this list?

Select by Circulation Type to identify copies that have a particular circulation type assigned to them. Use this report when removing or changing circulation types or loan periods.

Select by Category to view all the titles and copies associated with a specific copy category. By producing reading lists based on the categories, you can support curricula and promote neglected areas of your collection.

Select by Title and choose **Titles and all copies** to discover copies with mistyped or obsolete call number prefixes. Update the call number prefixes on the *Global Update* tab of *Update Copies* in the *Catalog*.

Generate this list by each copy status to examine a selected portion of your collection based on a specific copy status. You can use this list as a reference tool when analyzing your collection. For example, create a list of lost copies when ordering new books or before running the Individual or Batch Delete in *Update Copies*. Create a list of titles with copies on hold to discover your in-demand items.

To find the copies that are not circulating, select one of the *Show Titles* options that include copies, select the **Circulation statistics** and **Only show copies that circulated** check boxes, and limit it to **Less than 1 time This year**.