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.

![Report Builder interface](image)

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 Run.

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

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.
2. 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.

1. Select the primary sorting option from the Sort by drop-down.
2. In the drop-down next to Sort by, 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 →.

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:

1. Select the appropriate checkboxes from the following options:

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

2. Click →.
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 .

![Image of Patron General Information Report with limiters set up]

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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, the report opens in Report Manager. You can see your report In Progress at the top of the list. Click Refresh List until the status changes to Completed, and then click View.
5. When the Job Summary appears, do one of the following:
   - To view your report online, select Report.
   - To download the report as an XML file, which can be exported into Excel, select XML file.
   - To open a spreadsheet file in Microsoft Excel, select XLS File.