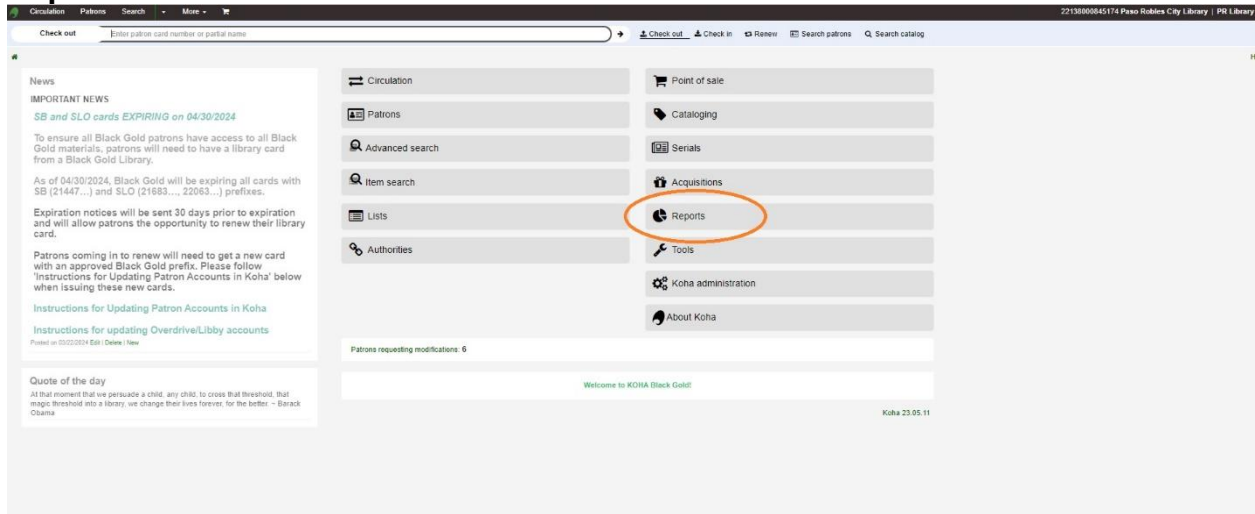


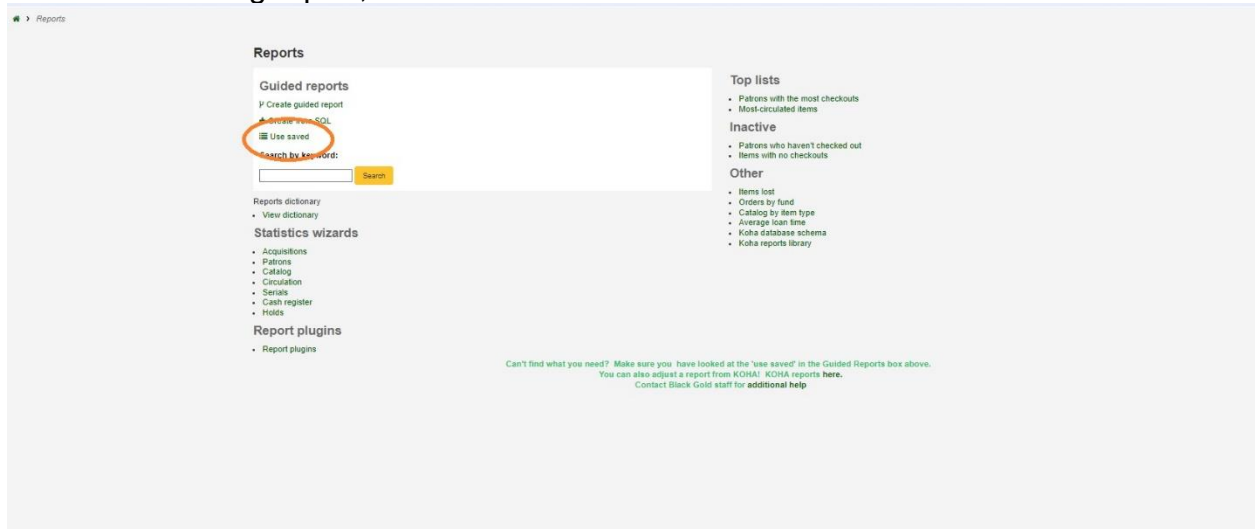
KOHA REPORTS

BEST PRACTICES

To access reports in Koha, start by navigating to the Home page and selecting **Reports**.



To use an existing report, click on **Use saved**.



This will take you to the Saved Reports page, where all available reports can be found under the **All** tab.

The screenshot shows the 'Saved reports' interface. At the top, there is a navigation bar with tabs for 'All', 'Accounts', 'Acquisitions', 'Authorities', 'Black Gold', 'Blanchard', 'Carpenteria', 'Catalog', 'Cataloging', 'Circulation', 'Goleta', 'Lompoc', 'Notices', 'Paso Robles', 'Patrons', 'Santa Maria', 'Serials', and 'test'. The 'All' tab is circled in orange. Below the tabs, there is a 'Subgroup' dropdown menu set to 'All'. The main area displays a table of 12 reports. The table has columns for ID, Report name, Type, Group, Notes, Author, Creation date, Last edit, Last run, Update, and Actions. The first report (ID 2) is 'Count of patrons whose cards will expire after a specific date, group by category'.

If you find a report that you like and plan to use frequently, it's best to duplicate it and assign the duplicated report to your library's Report Group.

This screenshot shows the 'Saved reports' page with a red circle around the report 'Previous Month's Circ Stats' (ID 5). An orange circle highlights the 'Duplicate' button in the 'Actions' column for this report. The interface includes a filter sidebar on the left and a top navigation bar with the 'All' tab selected.

This screenshot shows the 'Saved reports' page after a report has been duplicated. The 'Previous Month's Circ Stats' report (ID 5) is circled in orange. A new report, 'Previous Month's Circ Stats' (ID 5), has been created with a unique ID and is also circled in orange. The 'Duplicate' button in the actions menu for the original report is circled in orange. The interface includes a filter sidebar on the left and a top navigation bar with the 'All' tab selected.

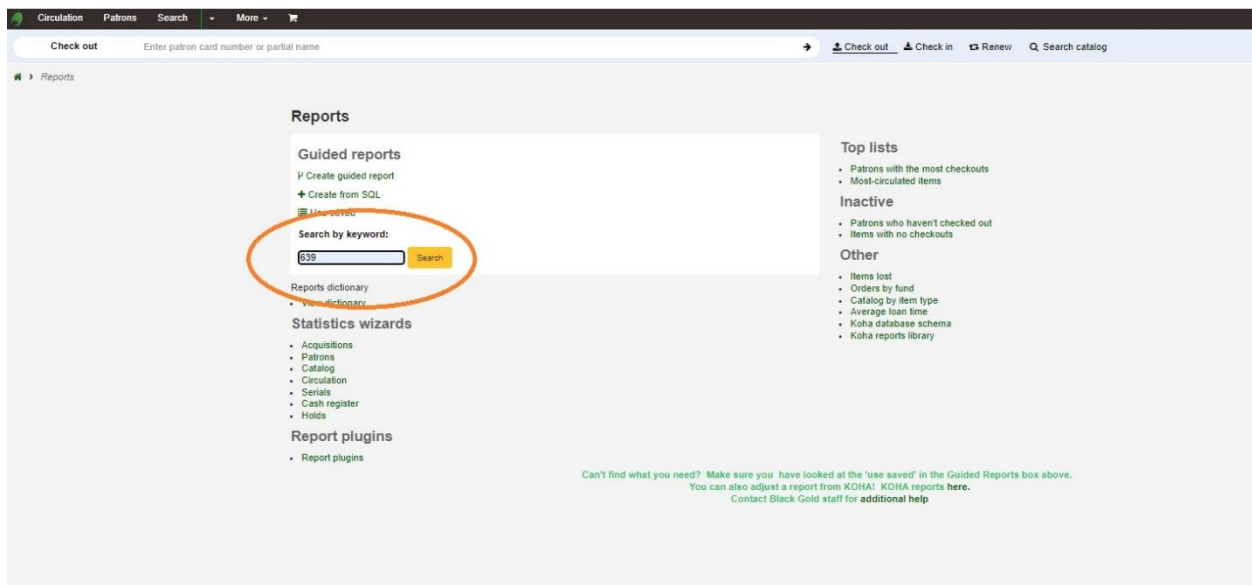
Duplicating the report creates a new report with a unique identification number.

You can then edit the report's name, description, and SQL code if needed. Any changes made to this duplicate report will not affect the original version.

Both the original and the new report will appear under the **All** tab, and the new report will also appear under your library's tab if you set your library as the Report Group.

Important: If you modify a report without duplicating it first, you will be altering the original report. This can lead to unintended consequences for other libraries that may rely on that report, as any changes will affect their version as well.

If you already know the report number or name, you can quickly access it by entering this information in the **Search by keyword** field on the **Reports** page.



You are also welcome to create your own reports in Koha. **Be sure to save any new reports under your Library tab.**

If you need a specific report but are unable to create it yourself, please contact the Black Gold office, and they will assist you in creating the report.