



Genesis G4 Library Program

G4 Creating Reports [□]

G4 Help Guides

This Document contains Digital Internet links, to provide additional detailed documentation.



Library System Guide – G4 Reporting Getting Started

Introduction:

Simplicity:

G4's program screen displays are intentionally simple easy to learn and use, LRMS purposely created the program to be of a non-ridged design. Don't be fooled by its simplistic look as it delivers what is needed to provide every level of library experience and the ability to master G4's powerful features. **Functionality** is key within G4 and is accomplished through the Main Menu/Back Office menu and sub-menu options. Using a Point and Click approach and simplistic program screens for management, each Sub-menu controls everything that has to do with that menu description, there is no hunting around within the program, control begins when you open that specific menu.

Flexibility:

Genesis G4 (a Windows program) when hosted as an online system is able to provide use of various platforms (iOS, Android & Windows 7, 10 & 11) for reporting functionality we provide these report options.

- ✓ Using the BackOffice option, select **Reports Management**
 - You will see five sub menus; each will expand when selected into additional sub menus. These menus will provide even more reporting options, each focused within their description area.
- ✓ These five major menus are:
 - Circulation Reporting
 - Catalog Reporting
 - Borrower/Patron Reporting
 - Analysis Reporting
 - My Custom Reports



Library System Guide – G4 Reporting Getting Started

Reports Management



Utilize existing or create custom Circulation, Catalog, Borrower, & Analysis Reports

Let's get started

Each of the Five major report categories expand offering pre-designed reports. These reports expand again once opened allowing for fine tuning the report to your specific need. Genesis G4 Reports Management provide a means to see your material collections from a maintenance and management perspective. This section provides pre-made reports that are able to be expanded simply by selecting various options within each report area. The procedures for using these reports are similar, learn one and you can operate them all.





Library System Guide – G4 Reporting Getting Started

Getting Started:

The LRMS Support team (given permission by you to do so) will always be available to provide explanation and a willingness to show you the functionality and use of G4 Report Printing. LRMS Support Staff can instantly view your "Online" program screen display to offer immediate support assistance, there is no waiting period or request form to activate a support need or request. Call 877-700-5767 or drop us an email to support@lrms.com.

About this document:

Many of the following pages may contain Internet hyper-links pointing to additional detailed Help documentation or videos.

Printing: Important

- To take full advantage of our Report printing be sure your computers "Default" printer is setup within G4's Advanced Settings Main Menu/Back Office "Printer Settings". **NOTE:** Printing for reports and labels is to use a Laser Printer being PCL5 or PCL6 compatible.
- Also add our free TSPrint software [LRMS/G4 Hosted services Only - New TSPrint Windows Client release Download Client VER. 3.2.2.8 - lrms Revised 10/21/2021](#)
- [TSPrint for Windows PDF Instructions \(See Page 4\)](#)

Reports Menu

Our reporting covers many years of report development, so there is the latest of reporting along with what some of our libraries have used for many years known as legacy reports.

Most reports are simple enough to use and with some experimentation you will become comfortable working with these.

This document will summarize each and begins with Circulation Reporting.

LRMS staff is always available and can instantly become involved to assist you, call 877.700.5767



Library System Guide – G4 Reporting Getting Started

Reports Menu

Circulation Reporting	Circulation Statistics
Catalog Reporting	Circulation Activities
Borrower/Patron Reporting	Circulation/Holdings Analysis
Analysis Reporting	Circulation Statistics (original)
My Custom Reports	Due Date Report in Descending Order
	Faculty Report
	Faculty Report - Original
	Overdue/Fines Listing
	Overdue/Fines Notices
	Daily Payment Summary
	Payments Summary
	Account Statements

Reporting:

There are two types of reporting within the G4 program, Reports that provide for Activity and Reports that provide Analysis.

All are self-explanatory and offer the ability of multiple report outputs.

Activity reports focus on Circulation activities as shown here. The balance of reporting has to do with Analysis reporting

Let's start with reviewing Circulation Statistics, next.



Library System Guide – G4 Reporting Getting Started

Circulation Statistics Reporting

Start: Tuesday, August 11, 2020 End: Tuesday, October 19, 2021

Today Yesterday Week Last Week This Month Last Month

Borrower Groups		Collections		Categories		Owner Codes	
Select	Name	Select	Name	Select	Name	Select	Name
<input checked="" type="checkbox"/>	07	<input checked="" type="checkbox"/>	E-BOOKS	<input type="checkbox"/>	All Including Unknown	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	08	<input checked="" type="checkbox"/>	ELLEN WORK/BATCH	<input checked="" type="checkbox"/>	AFRICA HISTORY	<input checked="" type="checkbox"/>	NZ
<input checked="" type="checkbox"/>	09	<input checked="" type="checkbox"/>	EQUIPMENT	<input checked="" type="checkbox"/>	AGRICULTURE	<input checked="" type="checkbox"/>	HAS
<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	KIT	<input checked="" type="checkbox"/>	AMERICAN LITERATURE	<input checked="" type="checkbox"/>	N
<input checked="" type="checkbox"/>	11	<input checked="" type="checkbox"/>	LOST BOOKS	<input checked="" type="checkbox"/>	ANCIENT & MEDIEVAL PHLOSC	<input checked="" type="checkbox"/>	NZ
<input checked="" type="checkbox"/>	12	<input checked="" type="checkbox"/>	MAIN COLLECTION	<input checked="" type="checkbox"/>	ANIMALS	<input checked="" type="checkbox"/>	NZL
<input checked="" type="checkbox"/>	13	<input checked="" type="checkbox"/>	PROFESSIONAL COLLECTION	<input checked="" type="checkbox"/>	ARCHITECTURE		
<input checked="" type="checkbox"/>	COM	<input checked="" type="checkbox"/>	TEXTBOOKS	<input checked="" type="checkbox"/>	ASTRONOMY		
<input checked="" type="checkbox"/>	FC	<input checked="" type="checkbox"/>	VIDEO COLLECTION	<input checked="" type="checkbox"/>	AUDIO CASSETTE		
<input checked="" type="checkbox"/>	K			<input checked="" type="checkbox"/>	BIBLIOGRAPHY		
<input checked="" type="checkbox"/>	PK			<input checked="" type="checkbox"/>	BIOGRARPHY		

Sort Level: Borrower Group, Category, Collections, Owner Code

Display: Check Ins, Check Outs, Renewals

Graphs and Totals: Include Graphs and Totals, Graphs and Totals Only

Buttons: Select All, Unselect All, Generate Report, Exit

Circulation Statistics & Graphical Reporting

Circulation Statistics has two output formats. Each format provides for an All or Selective set of reporting choices. We wanted to save time and some steps when creating your report filtering such as:

WHAT PERIOD:

- Use of a Day/Date Range or select Today, Yesterday, Week, Last week or Last month ago, etc.

OUTPUT:

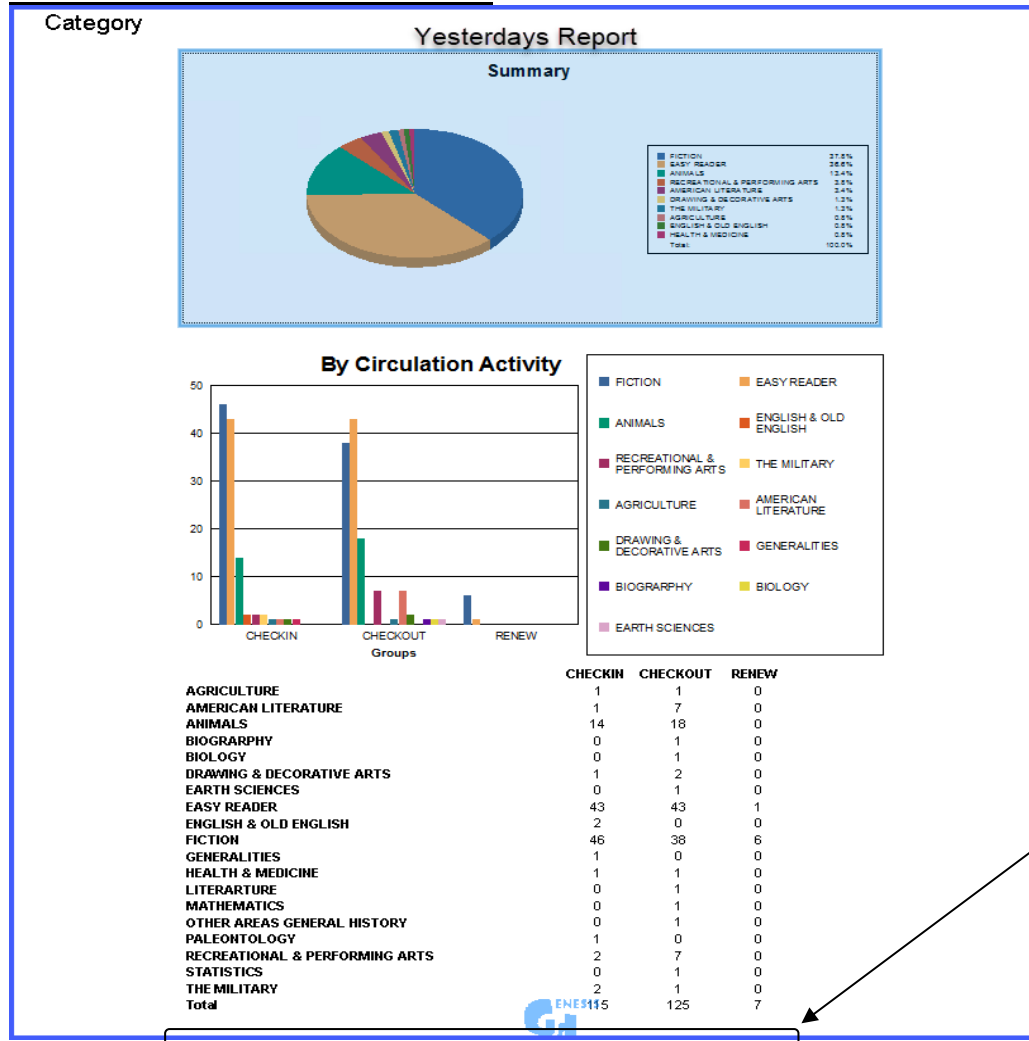
- Make your selections
- Stats by Group, Collections, Categories or by Owner Codes.
- Sort output, display by Circulation.
- Display in full report detail or only in Graphical format
- Produce the report to Print or Export in PDF or Excel format.

This is an excellent report to show Circulation activity in a Graphical Format for a Daily, Weekly, Monthly or Yearly and yearly comparisons.



Library System Guide – G4 Reporting Getting Started

Circulation Statistics Results:

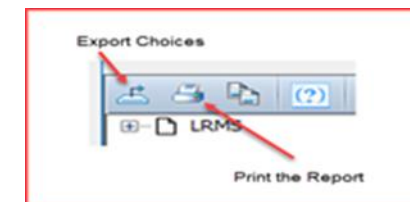


Results Sample Output:

This example is showing a daily activity report of Check-in, checkout and renewal and illustrates what grouping of book materials have been most used.

The graph visually illustrates what materials were mostly selected by patrons on this specific day. This report can be filtered by a specific group to see if one group verses another on the same was more active.

The next example shows the day before activity.



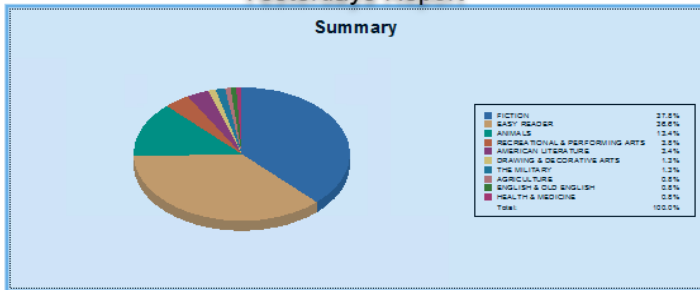


Library System Guide – G4 Reporting Getting Started

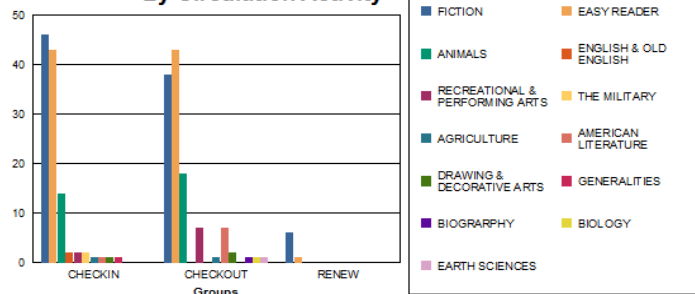
Category

Yesterdays Report

Summary



By Circulation Activity



	CHECKIN	CHECKOUT	RENEW
AGRICULTURE	1	1	0
AMERICAN LITERATURE	1	7	0
ANIMALS	14	18	0
BIOGRARPHY	0	1	0
BIOLOGY	0	1	0
DRAWING & DECORATIVE ARTS	1	2	0
EARTH SCIENCES	0	1	0
EASY READER	43	43	1
ENGLISH & OLD ENGLISH	2	0	0
FICTION	46	38	6
GENERALITIES	1	0	0
HEALTH & MEDICINE	1	1	0
LITERARTURE	0	1	0
MATHEMATICS	0	1	0
OTHER AREAS GENERAL HISTORY	0	1	0
PALEONTOLOGY	1	0	0
RECREATIONAL & PERFORMING ARTS	2	7	0
STATISTICS	0	1	0
THE MILITARY	2	1	0
Total	115	125	7

Reporting:

Using G4's built-in report options is an easy way to create comparisons, for the most part these reports use features allowing the user the ability to maneuver reporting with ease. These types of reports have a similar interface keeping their use simple.

Genesis G4 reports were created to assist the library staff to report on any activity or to review collection materials from a maintenance perspective.

All reports can be printed or saved in various formats with PDF being the most popular.

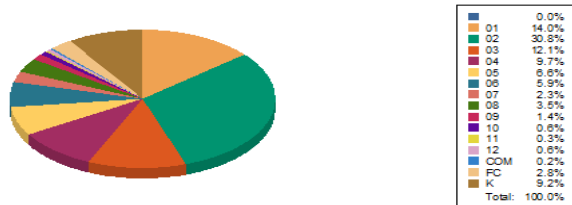


Library System Guide – G4 Reporting Getting Started

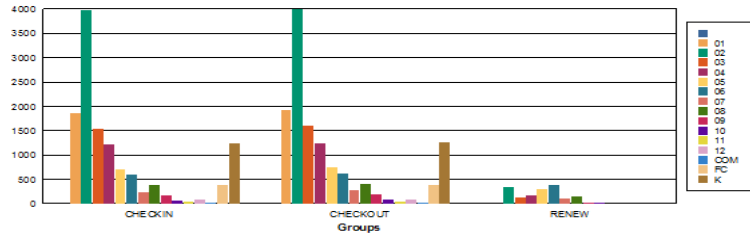
Circulation Statistics Report

Borrower

Summary



Circulation Counts



	CHECK IN	CHECKOUT	RENEW
01	1	1853	2
02	3965	1914	348
03	1528	3999	119
04	1212	1610	175
05	715	1233	175
06	715	749	306
07	587	619	391
08	232	281	111
09	392	414	150
10	163	186	25
11	67	89	15
12	41	47	2
COM	75	91	6
FC	25	25	3
K			

Create comparative analysis reports:

- Engage and show your Administrators.
- Reporting by a Date range or by day week or month can be helpful to determine what materials are being most selected.
- K-12 reporting can display a narrowing of library material usage because of reading program usage and testing.
- This reporting can assist in determining where more materials are needed based upon usage.
- Graphics assist administration to visually see what else is needed budget wise.



Library System Guide – G4 Reporting Getting Started

Circulation Activities – this report creates detail data

The screenshot shows the 'Circ ActivitiesHoldings Analysis' window. The 'Selection' tab is active, and 'Circulation Due In' is selected under the 'Circulation' section. The 'Start' date is 'Sunday, February 9, 2020' and the 'End' date is 'Wednesday, February 9, 2022'. The 'Order by' section has 'Borrower in P/T ID' selected. There are three tables for selection: 'Owner Codes' (with 'LRMS' checked), 'Borrower P/T ID' (with 'None' checked), and 'Borrower Groups' (with groups 01-12 checked). A 'Generate Report' button is highlighted with a red box. A red arrow points from the 'Circulation Due In' selection to the 'Generate Report' button. Another red arrow points from the 'Generate Report' button to the text 'Print or export your report results'.

Circ Activities Holdings Analysis

This report has many output choices, one can report on a narrow range to a broad range of selections. There are three primary choice to report upon.
Circulation Checked out
Circulation Checked In
Circulation Due In

All of these reports can be made to a specific purpose, example select Circulation Due In, then select the period of time to report on, next select the Order By: Filter by Owner Codes, Borrower PT/ID and by Borrower Group(s)

If you want to see what Circulation is Due In make this selection by Date or quick access choices like Today, Yesterday or Date range.

Print or export your report results



Library System Guide – G4 Reporting Getting Started

Circ Activities Holdings Analysis

Selection Results

Circulation Checked Out Circulation Checked In Circulation Due In

Order by: Borrower Borrower in P/T ID
 Borrower in Group Hand Out Slips
 Title Title in P/T ID
 Date / Borrower Date / Borrower in P/T ID
 Call Number

Start Sunday, February 9, 2020 End Wednesday, February 9, 2022

Today Yesterday Week Last Week Month Last Month

Owner Codes	
Select	Name
<input type="checkbox"/>	
<input type="checkbox"/>	CCA
<input type="checkbox"/>	GDC
<input checked="" type="checkbox"/>	LRMS
<input type="checkbox"/>	PIQUA

Borrower P/T ID		
Select	Name	PID
<input checked="" type="checkbox"/>	None	

Borrower Groups	
Select	Name
<input checked="" type="checkbox"/>	01
<input checked="" type="checkbox"/>	02
<input checked="" type="checkbox"/>	03
<input checked="" type="checkbox"/>	04
<input checked="" type="checkbox"/>	05
<input checked="" type="checkbox"/>	06
<input checked="" type="checkbox"/>	07
<input checked="" type="checkbox"/>	08
<input checked="" type="checkbox"/>	09
<input checked="" type="checkbox"/>	10
<input checked="" type="checkbox"/>	11
<input checked="" type="checkbox"/>	12

Select All Unselect All

Select All Unselect All

Select All Unselect All

Generate Report Exit

Circ Activities Holdings Analysis

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Print or export your report results