

## Using Reports in Libris DESIGN

### Overview of Reports

The data in any Expert or User Model in Libris DESIGN can be previewed by clicking on the **Reports** button on the bottom of the Library Model screen. (Be sure the selected library model is showing in the Model Name box at the top of the Library Model screen.)

A printer driver is required to use Reports, which are a function of Print Preview in Access. No changes can be made to data in User Reports

Over forty different reports are available with a hierarchy of data ranging from total building summaries to specific and detailed furniture and equipment lists.

Reports are broken down into the following areas:

**Square Footage:** reports include data about the size, quantity, and percentage of total square footage for Divisions, Library Spaces, Furniture and Equipment items, and Collection Shelving within these Divisions and Library Spaces for a selected Library Model.

**Cost:** reports include Furniture and Equipment and Collection Shelving costs organized by Divisions, Library Spaces, and Furniture and Equipment inventory items in selected Library Model.

**Divisions and Spaces:** reports include both brief and detailed text descriptions and summary lists for Divisions and Library Spaces including Functional Activity descriptions and Spatial Relationships for Divisions and Library Spaces as well as Furniture and Equipment and Collection Shelving information.

**Supercategories:** Libris DESIGN has organized the furniture and equipment and shelving of the Library Model into six broad categories: Meeting Rooms, Reader Stations, Technology, Shelving, Staff Workspace, and Special Purpose. These Supercategories reflect the type of information commonly required for reporting and funding application purposes.

**Collections:** reports provide detailed information on collection allocation, square footage, shelving types and costs for a selected model.

**Suppliers:** Supplier category reports provide lists of Inventory Items sorted by Supplier source or category to prepare purchase lists by source. You can select from the Libris DESIGN Supplier categories or create your own when you assign Supplier categories to the inventory items.

**Admin:** reports serve as the “authority file” for the database. Complete lists of items available for selection are organized into categories: Collection Subcategory, Inventory item, and Shelving Type. Reports include specific information on square footage; pricing levels, default space assignments or shelving type, subcategory and Volume Names.

**Open Final Menu** (Final Building Program): Outlines steps required to organize and produce a Building Program utilizing the data created in Libris DESIGN as well as other information for inclusion in the final Building Program document.

### Tips for Using Libris DESIGN Reports:

- Users are cautioned to check the length of a report before printing. To identify the length of a User Report, check the page numbers in print preview found in the lower right hand corner.
- Narrow the data in a report to focus on an individual Division or Space, by choosing a User Report with the (Select) option.

- To include an additional text line with the physical description of inventory items in a specific report, click on the “Include Descriptions” box before previewing the report. (This can make reports quite long.)
- To move forward and backward through a User Report, click on the right hand arrow next to the page number box in the lower left hand corner. (Navigation arrows.)
- To print a Report, click on the print button on the toolbar in Print Preview. Reports can also be exported to Word by clicking on the *W* on the toolbar. Reports can then be reformatted, customized or compiled with other Microsoft Word documents.
- Searching Reports. The *Find* function is not available in Reports. To search a Report for a particular item or term, export it to Microsoft Word and use the “find” (Ctrl F) function.

## Descriptive Catalog of Reports

### ❖ Square Foot Summaries Reports SF

Reports in this category provide data about the size, quantity, and percentage of total square footage for Divisions, Library Spaces, and Furniture and Equipment items and Collection Shelving within these Divisions and Library Spaces for a specific Library Model.

- SF1 Division Square Foot Summary
  - Simple total square footage summary organized alphabetically by Division name with Assignable Square Feet for each Division and Percent of Total (building) by Division. Includes non-assignable space allowance at the end of the report.
  - Provides a quick overview of the building contents.
- SF2 Space Square Foot Summary
  - Detailed total square footage overview alphabetically by Division name with Library Spaces organized by Division. Includes total square footage for Division as well as square footage for each Library Space assigned to the Division. Includes non-assignable space allowance at the end of the report.
  - Can be used to review Library Spaces in each Division, to verify which Division an individual Library Space has been assigned to, and to review sizes of individual Library Spaces.
  - Provides a quick overview of the divisions and space requirements for the library.
- SF3 Space Square Foot Summary (Select)
  - Same detailed square footage data contained in SF2 with ability to limit data to a single Division for a briefer report.
  - Enables user to review a single Division at a time. Provides briefer focused reports for review or distribution.
- SF4 Space Square Foot Summary with Furniture & Equipment and Shelving
  - Detailed report organized by Division and Library Space with complete listing of furniture and equipment items and collection shelving selected for each Library Space. Contains number of units, square foot allocation per unit, and total square foot allocation for furniture and equipment items selected for inventory list. The number of volumes housed by shelving units is also displayed by collection name.
  - Can be used to review contents of individual Library Spaces. This report can be used to verify that a particular furniture or equipment item has been included. Data is available in the same format with cost information attached instead of square footage in User Report CS4.
  - **Caution:** This report can be quite long. For briefer reports, this data is available for selection by Division in User Reports: SF5 Space Square Foot Summary with Furniture and Equipment (Select). Turning off the “Include Descriptions” will also shorten the User Report.
- SF5 Space Square Foot Summary with Furniture & Equipment and Shelving (Select)
  - Same content as SF4 available for selection by specific Division. Provides briefer focused reports for review or distribution.
- SF6 Net Square Foot Summary for Furniture & Equipment and Shelving
  - Complete furniture and equipment and shelving list for facility compiled and tallied, for all Library Spaces, by inventory item. Alphabetical list sorted by furniture or equipment item includes total quantity of item, square foot allocation per item, and total square footage for item. Shelving which is not assigned to a

specific collection (volume type) is included in this list; e.g., shelving units in offices and workrooms.

- A second list at the end of this User Report compiles shelving requirements for collections by total shelving units and square footage requirements.
- This report can be used to verify inclusion of individual items and to identify total quantity of individual furniture and equipment items and shelving units; e.g., number of bulletin boards. This report can be used for cross checking against existing inventory. (Prices not included in this report)
- **Hint:** This list can be used as an “authority file” for inventory items to verify exact names of selected existing inventory items in this report.

▪ **SF7** Square Foot Overrides and Extremes

- Provides a list of overrides to default square footage by furniture and equipment inventory item that user has entered in this library model.
- A second column ("Extremes") shows the square footage figures for a list of furniture and equipment where users have overridden the default square footage and gone outside the suggested maximum or minimum square footages.

❖ Cost Summaries Reports **CS**

Reports in this category provide information about the unit cost, quantity of items, and total furniture and equipment and collection shelving costs organized by Divisions, Library Spaces, and Furniture and Equipment inventory items in specific Library Model.

▪ **CS1** Division Furniture & Equipment and Shelving Cost Summary

- Simple total furniture and equipment and collection shelving cost summary organized alphabetically by Division name with cost of furniture and equipment and collection shelving for each Division and % of total furniture and equipment cost by Division. Can be used for a quick overview of the project’s furniture and equipment and collection shelving costs.

▪ **CS2** Space Furniture & Equipment and Shelving Cost Summary

- Detailed total furniture and equipment overview organized alphabetically by Division name. Includes total furniture and equipment and collection shelving cost for Division as well as furniture and equipment and collection shelving cost for each Library Space assigned to the Division.
- Identifies specific furniture and equipment and collection shelving costs associated with specific Library Spaces. Useful for evaluating cost of specific program as well as providing information for donor opportunities.

▪ **CS3** Space Furniture & Equipment and Shelving Cost Summary (Select)

- Same detailed furniture and equipment and collection shelving cost information contained in **CS2**, with ability to select by specific Division. Provides briefer focused reports for review or distribution.

▪ **CS4** Detailed Space Furniture & Equipment and Shelving Cost Summary

- Detailed report organized by Division and Library Space with complete listing of furniture and equipment items and shelving units selected for each Library Space. Contains number of units, cost per unit, and total cost for furniture and equipment items selected for inventory list. . The number of volumes housed by shelving units is also displayed by collection name.
- Useful for review furniture and equipment and shelving contents of individual Library Spaces and to verify a particular item has been included. Contains information in the same format as **SF4** with cost instead of square footage requirements.
- **Caution:** This report can be quite long. Choose **CS 5** Detailed Space Furniture and Equipment Cost Summary (Select) for a brief report and/or remove item descriptions from list.

- **CS5** Detailed Space Furniture & Equipment and Shelving Cost Summary (Select)
    - Same content as **CS4** available for selection by specific division. Provides briefer focused reports for review or distribution.
  - **CS6** Cost Summary for Furniture & Equipment and Shelving
    - List by item (furniture or equipment) name with number of units by item, unit cost per inventory item, and total cost by item for total building. Shelving units which are not assigned to a specific collection (volume type) are included in this list; e.g., shelving units in offices and workrooms.
    - A second list at the end of this User Report compiles shelving requirements for collections including total shelving units and cost information.
    - Can be used to locate individual items to make sure they have been included in the building program. It does not identify the Library Space that the item has been assigned to. Primarily used to identify total quantities of items; e.g., number of bulletin boards, this report is useful for organizing information for purchasing, donor opportunities, or cross checking against existing inventory.
  - **CS7** Cost Overrides and Extremes
    - Provides a list of overrides to default prices by furniture and equipment inventory item that user has entered in this library model.
    - A second column ("Extremes") shows the cost figures for a list of furniture and equipment including shelving where users have overridden the default cost and gone outside the suggested maximum or minimum costs.
  - **CS8** Project Cost Estimate Summary
    - Report enables users to review total project budgets they have created for specific library models. If no budgets have been created, no reports will be available. To create budgets, users should exit User Reports and Select **Budgets** from the Library Model Screen.
    - To view User Reports for project budgets, first select from three types of budget: New construction, Remodeling/Conversion and Expansion and Remodeling and then click on the name of a specific budget.
    - Budgets can be printed from this User Report or sent to Microsoft Word for reformatting or compilation into another Microsoft Word document.
  - **CS9** Project Cost Estimate with Details
    - More detailed cost estimate with more breakdowns by category than in **CS8**. Cost per square foot for each line item is shown along with the percent of the total project cost.
    - Same printing and use features as **CS8**
- ❖ Divisions and Spaces **DS**
- This category provides both brief and detailed text descriptions and summary lists for Divisions and Library Spaces including Functional Activity Descriptions and Spatial Relationships for Divisions and Library Spaces. Hierarchy of data available is similar to **SF** and **CS** User Reports. Reports from this category will become the body of the Building Program document.
- **DS1** Division Sheets (All)
    - Simple one to two page description for each Division including Total Square Footage of Division, Functional Activity, Spatial Relationships and Summary of Library Spaces included in each Division.
  - **DS2** Division Sheet (Select)
    - Same data set as **DS1** with ability to limit retrieval by specific Division.
  - **DS3** Division Functional Activity Description

- A compilation of all Functional Activity text for all Divisions included in a specific Library Model. Does not include information on individual Library Spaces within Division.
- Provides an overview of the program goals and qualitative aspects of the library's program.
- **DS4** Division Spatial Relationship
  - A compilation of all Spatial Relationships and Proximity text for the Divisions included in a specific Library Model. Does not include information on individual Library Spaces within Division.
  - Useful for overview of the physical organization of the building and for preparing bubble diagrams.
- **DS5** Detailed Division and Space Sheets (All)
  - Basis of the Building Program
  - Detailed, lengthy report including simple description for each Division as available in **DS1** as well as complete Library Space Sheet for each individual Library Space included in the Division.
  - Library Space Sheet includes all text available from each of 18 text fields for a Library Space (Space Information, Function, Occupancy, Flexibility, Security, Relationships, Acoustics, Finishes, Illumination, Fenestration, HVAC, Electrical, Data, Telephone, Audio-Visual, Signage, Illustrations, and ADA). Report includes all Furniture and Equipment and Shelving for Collections assigned to the Library Space, sorted into "Supercategories" of furniture and equipment. (See below for description of "Supercategory".)
  - **Note:** The heading for a text field (see above) will not appear in this User Report if there is no text in the field.
  - **Note:** The number of text fields displayed in the "Space Sheet" can be limited if "First Draft" or "Second Draft" options are selected. This will also keep the report from being so lengthy.
  - **Caution:** This can be quite a lengthy report. To limit by individual Divisions use Report **DS6**.
- **DS6** Detailed Space sheets by Division Space (select)
  - Report provides same data as **DS5** with ability to limit data provided by selection of individual Library Space within a Division.
  - Report users select Division from window and then Library Space from pop up window.
- **DS7** Space Detail (select) for all spaces
  - Report compiles all text available in 16 specific text fields (excludes Space Info and Illustrations) for individual Library Spaces. Users select a specific text field ("Space Detail"), to review data available in a selected text field by Division and Library Space within a Division.
  - Report can be used to review and evaluate specific general building conditions in the building program or to identify empty text fields for missing or incomplete information.
  - **Note:** If a space does not have any text in the text field for the "space detail" selected, the space name will not display under the Division in the list.
  - **Note:** When a specific space detail (text field name) is selected, and there is no text for that text field in any of the spaces for the library model selected, a "No data available" message screen will appear.

❖ Supercategories **SC**

Libris DESIGN has organized the furniture and equipment and shelving content of the Library Model into six broad categories: Meeting Rooms, Reader's Stations, Technology,

Shelving, Staff Workspace, Special Purpose. These Supercategories reflect the type of information commonly required for reporting and funding application purposes.

- **SC1** Space Allocation by Supercategory
  - Overview summary of each of the six Supercategories including total net assignable space, non-assignable square feet, and percentage of total space by each Supercategory.
  - Brief summaries can be used to identify percent of total space assigned to specific function.
- **SC2** Allocation of Supercategory Items by Space
  - Detailed listing of Supercategory inventory items organized by Division and by Library Space within each Division.
  - Useful for identification of distribution of various items throughout the building program; e.g., identify all of the meeting room seats and their location.
  - **Caution:** This is a very lengthy report. Selecting “Include Description” will make this report nearly twice as long.
  - **Note:** Shelving Supercategory does not include shelving units which are not assigned to collections; e.g., shelving units in offices and boardrooms. These are located in Staff Workspace or Special Purpose Supercategories.
- **SC3** Allocation of Supercategory Items (Select) by Space
  - Contains same data as **SC2** with ability to limit selection by specific Supercategory.
- **SC4** Totals for Item Types by Supercategory
  - Contains complete list of inventory items, quantity of items, and total square foot allocation by item organized by Supercategory; e.g., Special Purpose Supercategory contains total count of book trucks in the project.
  - Supercategory unit lists can be used for organizing data for purchasing and verification of quantities of specific items; e.g., whiteboards.
- **SC5** Totals for Item Types by Supercategory (Select)
  - Contains same data as **SC4** with ability to limit selection by specific Supercategory for briefer report.
- **SC6** Cost Summaries by Supercategory
  - Data in same format as User Report **SC4** Furniture and Equipment items sorted by Supercategory for total building with cost information instead of square foot requirements. Data is further sorted into items identified for public vs. staff use.
  - Report can be used to identify costs associated with specific items within a Supercategory for budgeting or fundraising purposes; e.g., identification of costs associated with Technology for Public Use.
- **SC7** Cost Summaries by Supercategory (Select)
  - Contains same data (Furniture and Equipment items sorted by Supercategory) as User Report **SC6** with the ability to limit selection by specific Supercategory to view a briefer report. Data is further sorted into items identified for public vs. staff use.
- **SC8** Supercategory Cost Summary by Space
  - Contains same data (Furniture and Equipment items sorted by Supercategory) as User Report **SC6** with additional sort into Library Spaces. Report **SC8** enables users to identify specific costs by Supercategory for a specific Library Space; e.g., cost of reader seats in Children’s Collection and Seating Area.
- **SC9** Supercategory Cost Summary by Space (Select)

- Contains same data as report **SC8** with ability to limit search by selecting specific Library Space.
- Useful for providing briefer more focused cost estimates for Furniture and Equipment.

❖ Collections

Contains Reports that provide detailed information on collection allocation, square footage, shelving types and costs for a selected model.

- **C1** Collection Allocation
  - Information on holdings sorted by category and volume type.
  - Simple report with collections organized into three reports by categories (books, media, periodicals) including alphabetical listing of volume types (adult/young adult and children/juvenile) with information on total volumes, % of total holdings, percent of volumes in circulation, and number of volumes per linear foot.
  - Good overview of total holdings.
- **C2** Collection Allocation (Select)
  - Same data as available in **C1** with ability to limit selection by format of material (books, media, periodicals) to limit amount of information retrieved.
- **C3** Collections and Shelving
  - Shelving the Library's Collection. Report provides data on number of shelving units and space allocation by Collection Name.
  - Collection data is available for three categories (books, media, periodicals). Each report includes data on projected number of volumes on shelf, volumes per linear foot, number of shelving units required, square feet per shelving unit, and total square feet required for collection by both Collection Category (adult/young adult and children/juvenile) and Volume Name
  - Can be used for determining space allocation or number of shelving units for individual collections.
- **C4** Collections and Shelving (Select)
  - Same data available as in User Report **C3** with ability to limit data selection by Collection Type (book, periodical, media.)
- **C5** Volumes per Linear Foot Overrides
  - Provides a list of overrides to default volumes per linear foot by volume type that user has entered in this library model.
  - Useful to identify potential errors or extreme overrides that might affect total square footage.

❖ Supplier

Contains Reports that provide lists of Inventory Items sorted by Supplier source or category to prepare purchase lists by source. You will have to assign a Supplier Category to Inventory Items to be able to use these reports. You can select from the Libris DESIGN Supplier categories or create your own. Supplier lists are available sorted by Supplier, by Space or by Space by Supplier. In the Supplier Reports Menu you will make the choice whether you want your reports to contain pricing. This can be changed at any time.

- **S1** Supplier Furniture and Equipment and Shelving Master List
  - This report contains the entire list of furniture and equipment and shelving in your User Model listed alphabetically sorted by Supplier source.

- **S2** Supplier Furniture and Equipment and Shelving Master List (Select)
  - This report contains the same information as report V1 with the ability to limit the selection to an individual Supplier category. This list would be used to prepare a bid or purchase list for a specific Supplier or source.
  - If categories, such as “Existing” are used, this list can be used to identify items that will be reused.
  - If categories such as General Contractor or Casework are included, this report can be used to identify items that may not be included in the furniture and equipment budget.
  
- **S3** F & E and Shelving List by Space (All Suppliers)
  - This report lists all Spaces, sorted alphabetically, by Division, with all furniture and equipment and shelving listed broken down into Supplier categories.
  
- **S4** F & E and Shelving List by Space (Select by Suppliers)
  - This report lists all Spaces sorted alphabetically by Division, with all furniture and equipment and shelving for that Space for a specific Supplier. This list could be used to prepare a purchase or bid list for an individual space in the project.
  
- **S5** Supplier F & E List by Library Space (All Suppliers)
  - This report lists all items to be purchased from all Suppliers listed alphabetically by Space. This list could be used to identify the locations for items on a bid or purchase list.
  
- **S6** Supplier F & E List by Library Space (Select Suppliers)
  - This report lists all items to be purchased from a Specific Supplier alphabetically by Space. This list could be used for a specific Supplier to identify the locations for items on a bid or purchase list.

❖ Administrator **RM**

These reports serve as the “authority file” for the database. Complete lists of items available for selection are organized into categories: Collection Subcategory, Inventory item, and Shelving Type. Reports include specific information on square footage, pricing levels, default space assignments or shelving type, subcategory and volume names.

- **RM1** Volume Type and Default Shelving Master List
  - List of specific Collection Volumes available including default shelving and volumes per linear foot for each volume.
  
- **RM2** Subcategory and Default Space Assignment Master List
  - List of Subcategories of Collection Types available including default Space Assignment.
  
- **RM3** Inventory Item Master List

- List of Inventory Items available for selection. Includes square footage (minimum, default, maximum) and cost (low, moderate, high). Also includes brief physical description of item and Supercategory assignment.
- Users may prefer to search this list before attempting to create new item for specific Library Spaces since assignable square feet and pricing information is included.
- **RM4** Shelving Type Master List
  - Complete list of shelving types available for selection. Includes aisle widths, height, depth, facing (single or double) information and number of shelves per unit as well as square foot per unit and cost information (low, moderate, high).
- **RM5** Library Model Master List
  - Overview of all Users' Library Models in the Libris DESIGN database. Useful for file management when multiple models are being worked on.
- **RM6** Consistency Check
  - Follow instructions in green box.
  - The "Consistency Check" button allows the user to run 12 separate diagnostic reports that will tell the user if there are any calculation problems within the selected library model.
  - This report should be run periodically (and definitely prior to final building program printing) as a database diagnostic. If there is a problem with the database, a report or series of reports will be generated. Follow the instructions provided in the gray box at the top of the report, to fix any problems in the database calculations.
  - If there are no problems with the database calculations, a "No errors were detected" message will appear.

#### ❖ Open Final Menu

This section of User Reports provides detailed information on organizing and producing a Building Program utilizing the data created in Libris DESIGN as well as other information for inclusion in the final Building Program document. Users are strongly urged to follow warning instructions and close down all other applications before using this series of screens.

In the Final Reports menu, Users will be able to select from the reports they have created and reviewed, to organize these reports in sequence for their final document, to create a table of contents for their final document, and to identify chapters and sections which they will have to write using a word processing program or create using a spreadsheet program. Additional front-end general conditions information for library facilities will be available as Microsoft word text on the Libris DESIGN website.

Libris DESIGN will not collate the final document. Libris DESIGN User Reports can be sent to Microsoft Word and compiled with other user generated sections to complete the production of the final building program but much of the formatting will be lost.