

Sample Reports: Descriptions

Report: **Generate Repository Profile**. (Default Report Header: Comprehensive Repository Profile on [date])

Description: Displays a snapshot of the repository's holdings listed in the Toolkit. Includes statistical information about resources, accessions, extent of holdings, name authorities and subject authorities

Functional Area: Accessions

Report: **Accessions intellectual property status**

File Name: accessionsIPStatus

Description: Displays the intellectual property status of listed accession(s). Report contains accession number, linked resources, title, extent, cataloged, date processed, rights transferred and a count of the number of records selected with rights transferred.

Functional Area: Accessions

Report Title: **Accession inventory** (Default Report Header: Accessions container list)

File Name: accessionsContainerList

Description: Displays the inventory of an accession record or records. Report contains accession number, linked resources, title, extent, accession date, container summary, and inventory.

Functional Area: Accessions

Report Title: **Accession processing plan**

File Name: accessionsProcessingPlan

Description: Displays accessions that have a processing plan. Report contains accession number, linked resources, title, date range, extent, container summary, and processing plan.

Functional Area: Accessions

Report Title: **Accession production report**

File Name: accessionsProductionReport

Description: Displays accessions that have been accessioned, processed, and cataloged during a specified time period. Produces a summary statement of the total number of accessions, the total extent, total extent processed, and extent cataloged within the specified date range.

Functional Area: Accessions

Report Title: **Accession receipt**

File Name: accessionsReceipt

Description: Displays a receipt indicating accessioning of materials. Report contains accession number, title, extent, accession date, and repository.

Functional Area: Accessions

Report Title: **Accession record(s)** (Default Report Header: Accession Record)

File Name: accessionsRecord

Description: Displays key fields for selected accession record(s).

Functional Area: Accessions

Report Title: **Accessions acquired** (Default Report Header: Cumulative list of acquired accessions)

File Name: accessionsAcquired

Description: Displays a list of all accessions acquired in a specified time period. Report contains accession number, title, extent, accession date, container summary, cataloged, date processed, rights transferred and the total number and physical extent.

Functional Area: Accessions

Report Title: **Accessions cataloged** (Default Report Header: Cumulative list of accessions cataloged)

File Name: accessionsCataloged

Description: Displays a list of all accessions that have been cataloged. Report contains accession number, linked resources, title, extent, cataloged, date processed, a count of the number of records selected that are checked as cataloged, and the total extent number for those records cataloged.

Functional Area: Accessions

Report Title: **Accessions not cataloged.** (Default Report Header: Cumulative list of accessions uncataloged)

File Name: accessionsUnCataloged

Description: Displays accession(s) that have not been checked as cataloged. Report contains accession number, linked resources, title, extent, cataloged, date processed, a count of the number of records selected that are not checked as cataloged, and the total extent number for those records not cataloged.

Functional Area: Accessions

Report Title: **Accessions processed.** (Default Report Header: Cumulative list of accessions processed)

File Name: accessionsProcessed

Description: Displays accession(s) that have been processed based on the date processed field. Report contains accession number, linked resources, title, extent, cataloged, date processed, a count of the number of records selected with a date processed, and the total extent number for those records with date processed.

Functional Area: Accessions

Report Title: **Accessions unprocessed.** (Default Report Header: Cumulative list of accessions unprocessed)

File Name: accessionsUnprocessed

Description: Displays accession(s) that have not been processed. Report contains accession number, linked resources, title, extent, cataloged, date processed, a count of the number of records selected with date processed, and the total extent number for those records without a completed date processed field.

Functional Area: Accessions

Report Title: **Accessions with deaccessions.** (Default Report Header: Accessions Acquired and Linked Deaccession Records)

File Name: accessionsDeaccessionsList

Description: Displays a list of accession record(s) with linked deaccession record(s). Report contains accession number, title, extent, accession date, container summary, cataloged, date processed, rights transferred, linked deaccessions and total extent of all deaccessions.

Functional Area: Accessions

Report Title: **Accessions with linked names and subjects list.** (Default Report Header: Accessions with linked subjects and names list)

File Name: accessionsSubjectNamesList

Description: Displays accessions with their linked names and subjects. Report contains accession number, linked resources, accession date, title, extent, linked names, and linked subjects.

Functional Area: Accessions

Report Title: **Accessions with rights transferred**

File Name: accessionsRightsTransferred

Description: Displays list of accession(s) for which rights have been transferred. Report contains accession number, linked resources, title, extent, cataloged, date processed, access restrictions, use restrictions, rights transferred and a count of the number of records selected with rights transferred.

Functional Area: Locations

Report Title: **Location shelf list/locations with resource or accession record(s).** (Default Report Header: Locations with resources and accessions list)

File Name: locationsResourcesList

Description: Displays a list of locations, indicating any accessions or resources assigned to defined locations.

Functional Area: Names

Report Title: **Name record(s)**

File Name: namesRecord

Description: Displays name(s) record information for selected record(s). Report shows all data contained in the Details and Contact Info record tabs.

Functional Area: Names

Report Title: **Name list.** (Default Report Header: Name records list)

File Name: namesList

Description: Displays a list of name(s). Report contains sort name, name type and name source.

Functional Area: Names

Report Title: **Names with accession(s).** (Default Report Header: Name records and linked accessions)

File Name: namesListAccessions

Description: Displays name(s) and all accessions to which the name is linked. Report contains sort name, name type, name source and any accession records linked to that name.

Functional Area: Names

Report Title: **Names with non-preferred names.** (Default Report Header: Name records and non-preferred forms)

File Name: namesToNonPreferred

Description: Displays name(s) with all non-preferred name(s) for each name. Report contains sort name, name type, name source and any other non-preferred forms of that name.

Functional Area: Names

Report Title: **Names with resource(s).** (Default Report Header: Name records and linked resources list)

File Name: namesListResources

Description: Displays name(s) and all resources to which the name is linked. Report contains sort name, name type, name source and any resources records linked to that name.

Functional Area: Names

Report Title: **Names with resource(s) and accession(s).** (Default Report Header: Name records with linked accessions and resources)

File Name: namesListResourcesAccessions

Description: Displays names and all resource(s) and accession(s) to which the name is linked. Report contains sort name, name type, name source and any resources records or accession records linked to that name.

Functional Area: Resources

Report Title: **Resource record(s)**

File Name: resourcesRecord

Description: Displays key fields for selected resource record(s).

Functional Area: Resources

Report Title: **Resource(s) restricted.** (Default Report Header: Resources with restrictions list)

File Name: resourcesRestricted

Description: Displays resource(s) that are restricted. Report contains title, resource identifier, level, date range, creator names, and a total extent number of the records selected that are checked as restrictions apply.

Functional Area: Resources

Report Title: **Resource(s) with location(s).** (Default Report Header: Resources and locations list)

File Name: resourcesLocationsList

Description: Displays resource(s) with all specified location information. Report contains title, resource identifier, level, date range, and assigned locations.

Functional Area: Resources

Report Title: **Resource(s) with name(s) linked as creator.** (Default Report Header: Creator names to resource list)

File Name: resourcesCreatorNamesList

Description: Displays resource(s) with name(s) linked as creator. Report contains title, resource identifier, level, date range, and creator name.

Functional Area: Resources

Report Title: **Resource(s) with name(s) linked as source.** (Default Report Header: Source names to resource list)

File Name: resourcesSourceNamesList

Description: Displays resource(s) with name(s) linked as creator. Report contains title, resource identifier, level, date range, and source name.

Functional Area: Resources

Report Title: **Resource(s) with name(s) linked as subjects and with subjects.** (Default Report Header: Resources with linked subjects and names list)

File Name: resourcesSubjectsNamesList

Description: Displays resource(s) with names linked as subjects and with linked subjects. Report contains title, resource identifier, level, date range, linked names and their functions, and linked subjects.

Functional Area: Resources

Report Title: **Resources list**

File Name: resourcesList

Description: Displays resource(s) in list fashion. Report contains title, resource identifier, level, date range, and creator names.

Functional Area: Resources

Report Title: **Resources with deaccessions**

File Name: resourcesDeaccessionsList

Description: Displays resource(s) with linked deaccession record(s). Report contains title, resource identifier, level, date range, linked deaccessions, creator names, and physical extent totals.

Functional Area: Subjects

Report Title: **Subject record(s)**

File Name: subjectsList

Description: Displays subject record(s). Report lists subject term, subject term type, and subject source.

Functional Area: Subjects

Report Title: **Subject(s) with linked accession(s) and resource(s).** (Default Report Header: Subject records with linked resources and accessions list)

File Name: subjectsListResourcesAccessions

Description: Displays subject(s) with linked accession(s) and resource(s). Report contains sort subject term, type, source and any resource records and accession records linked to that subject.