

## Steps Used At UIC to Make Decision on Customizing Reports

- Determine exactly what data elements are needed
  - Does it include status, transactional information, location, etc.?
- Determine how you will use the statistics or report
  - Do you need statistics for annual, consortial requirements, ARL, AAHSL, etc.?
  - Do you need statistics for internal use?
  - Will report be used to identify, correct, track issues?
  - Will report be used to search for items?
- Does a report, either exactly or similar, exist already?
  - Check prepackaged Access Reports
  - Check CARLI report SQL
- If report exists, can it be revised (if needed)?
- If report doesn't exist, can you write SQL to extract what is needed, or articulate to your SQL writer?
- Test against samples or manual counts to ensure correct data is reflected on report or statistics
- Revise SQL as needed until report is exactly what you want!