

# Alaska Medical Library Database Manual

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## Introduction

This version of the Alaska Medical Library database was created in summer 2014 by Tessa Clifton and Sam Johnson. It was created using Access 2013 and was translating data and reports that were created in Access 2003. The following manual details information about the tables, queries, forms, and reports used in the final version of the database.

## Tables

### Identifier

This table represents the combination of a person and the organization they are connected to. A person can be attached to multiple organizations, and thus be present in more than record in the identifier table. It also documents whether the combination is active. The BillingAddress, BillingCity, BillingState, and BillingZipCode Fields are used only if the person is part of an organization that doesn't have its own billing information (I/Pay, I/Dep, etc.).

Identifier (PK)	Long Integer
OrgID (FK)	Long Integer
Active	Yes/No
PeopleID (FK)	Long Integer
BillingAddress	Short Text
BillingCity	Short Text
BillingState	Short Text
BillingZipCode	Short Text

### Journal

The Journal table keeps track of the various journals that people can be subscribed to.

PubID (PK)	Short Text
PubTitle	Short Text
FrequencyCode (FK)	Long Integer

### JournalFrequency

The JournalFrequency table logs the various lengths of time a journal can be published by.

FrequencyCode (PK)	Long Integer
FrequencyText	Short Text

## **Organizations**

This table logs all of the information about the organizations. The OrgCode is a way to identify an organization. The OrgAddress, OrgCity, OrgState, and OrgZipCode contain information about the physical address about the organizations while the BillingAddress, BillingCity, BillingState, and BillingZipCode fields are for billing information. Active determines whether that organization is still being actively used. IsNonProfit is used for accounting purposes to determine what type of fee is placed on an organization for a service. PaysFee determines if the organization pays the accounting fees or if the individual who ordered service does.

OrgID (PK)	Long Integer
OrgCode	Short Text
OrgName	Short Text
OrgAddress	Short Text
OrgCity	Short Text
OrgState	Short Text
OrgZipCode	Short Text
BillingAddress	Short Text
BillingCity	Short Text
BillingState	Short Text
BillingZipCode	Short Text
ContactLast	Short Text
ContactFirst	Short Text
ContactTitle	Short Text
ContactPhoneNo	Short Text
ContactFaxNo	Short Text
Notes	Short Text
Active	Yes/No
IsNonProfit	Yes/No
PaysFee	Yes/No

## **People**

This table logs the information about the people in the database. The IsTC and IsSDI fields are a holdover from an older version of this database. Though they are not used in our database,

there was still concern that their information would be needed at some point. There is no billing info in this table because it comes from either the Organizations table or the Identifier table, depending on the person's organizational affiliation.

PeopleID (PK)	Long Integer
SearchCatIDOccCode (FK)	Long Integer
FirstName	Short Text
LastName	Short Text
Title	Short Text
LocAddress	Long Text
LocCity	Short Text
LocState	Short Text
LocZipCode	Short Text
LocPhoneNo	Short Text
LocFaxNo	Short Text
Email	Short Text
Notes	Short Text
Dept	Short Text
ProsperoPin	Short Text
ProxyPin	Short Text
CreationDate	Date With Time
IsTC	Yes/No
IsSDI	Yes/No

## **SDILink**

This table is a holdover from an old version of the database that doesn't function as it was meant to. In order for this table to be integrated, all data must be either deleted or gone over. It is meant to be linked to the SubjectCode table.

## **SearchCatOccCodes**

This table catalogs the various Search Categories and Occupation Codes used to describe people.

SearchCatIDOccCodeID (PK)	Long Integer
SearchCategory	Short Text
Defintion	Short Text

## **SearchDatabase**

This table catalogs the databases that are used to do searches.

DatabaseID (PK)	Long Integer
DatabaseName	Short Text

## **SearchDeliveryMethod**

This table catalogs the delivery methods used for searches.

DeliveryMethodID (PK)	Long Integer
DeliveryMethod	Short Text

## **SearchLog**

This table catalogs all the searches done.

SearchLogID (PK)	Long Integer
Identifier (FK)	Long Integer
DateRequested	Date With Time
DateCompleted	Date With Time
SearchUserID (FK)	Long Integer
SearchCatIDOccCodeID (FK)	Long Integer
Topic	Short Text
NumberOfCitationsFound	Double
NumberOfCitationsSent	Double
BillingEntered	Yes/No
DeliveryMethodID (FK)	Long Integer
MarkedInteresting	Yes/No

## **SearchLogDetail**

This table contains information relating to searches from the SearchLog table. The CitationsFound field is a carry over from an old version of the database, though it is unclear if it is meant to be the same as the NumberOfCitationsFound in the SearchLog table. It was left in because the values of NumberOfCitationsFound and CitationsFound don't match.

SearchLogDetailID (PK)	Long Integer
SearchLogID (FK)	Long Integer
DatabaseID (FK)	Long Integer
CitationsFound	Double

## **SearchUsers**

This table catalogs the users allowed to perform searches.

SearchUserId	Long Integer
Name	Short Text

## **ServiceCodes**

This documents possible service codes that can be assigned to services performed. The DebitCredit, FeeNonProfits, and FeeProfits fields are used in reports and data entry when calculating accounting totals. The Hidden field is used to designate if a service should be shown in accounting reports or not.

ServiceCode (PK)	Short Text
ServiceDesc	Short Text
FeeNonProfits	Double
FeeProfits	Double
DebitCredit	Short Text
Hidden	Yes/No

## **Services**

This tracks all services entered into the library. The Total field is calculate by multiplying the QtyFilled field by UnitPrice. The UnitPrice field depends on whether the organization tied to the service is profit or non-profit, though it is still manually entered (something that may be rectified in later version of the database).

ServiceID (PK)	Long Integer
DateFilled	Date With Time
ServiceCode	Short Text
QtyFilled	Double
UnitPrice	Double
Paid	Yes/No
DateEntered	Date With Time
Identifier (FK)	Long Integer
Total	Double (Calculated)

## **SubjectCode**

This table is a holdover from an old version of the database that doesn't function as it was meant to. In order for this table to be integrated, all data must be either deleted or gone over. It is meant to be linked to the SDILink table.

## **TOCLink**

This table is the catalog of all the publications people are subscribed to. Active describes if the link is still currently used or not.

TOCLinkID (PK)	Long Integer
PubID (FK)	Short Text
PeopleID (FK)	Long Integer
Active	Yes/No

## Queries

### **AccessInvoiceCredit(I/)**

This query is used in the AccessInvoiceCredit(I/) report to calculate the sum of all services that are marked as being a Credit within organization that begin with "I/".

### **AccessInvoiceCredit(Org)**

This query is used in the AccessInvoiceCredit(Org) report to calculate the sum of all services that are marked as being a Credit within organization that don't begin with "I/".

### **AccessInvoiceDebit(I/)**

This query is used in the AccessInvoiceDebit(I/) report to calculate the sum of all services that are marked as being a Debit within organization that begin with "I/".

### **AccessInvoiceDebit(Org)**

This query is used in the AccessInvoiceDebit(I/) report to calculate the sum of all services that are marked as being a Debit within organization that don't begin with "I/".

### **IdentifierDropdown**

This is used for a drop down menu in the DE SearchLog form.

# Forms

All forms beginning with DE are data entry forms. They will have an Undo Record button that allows for removal of entered data and an Add Record button to submit the new record to the database.

All forms beginning with Report are forms used to access and enter criteria for reports. These all have an Open Report, Preview Report, Report to File, and Print Report button.

All forms beginning with View are forms used for viewing records already entered into the database. They have an Undo Record button to revert any changes done to the record during the current viewing.

## **DE Journal**

This is the data entry form for the Journal table. This form is part of the Add Records tab on the Navigation Form as New Journal. The Frequency Code drop down menu is generated from records in the JournalFrequency table.

## **DE JournalFrequency**

This is the data entry form for the JournalFrequency table. This form is part of the Add Records tab on the Navigation Form as New Journal Frequency. The Frequency Code field is an automatically assigned primary key.

## **DE Organizations**

This is the data entry form for the Organizations table. This form is part of the Add Records tab on the Navigation Form as New Organization. The Org ID field is an automatically generated primary key field.

## **DE People**

This is the data entry form for the People table. This form is part of the Add Records tab on the Navigation Form as New Person. The People ID field is an automatically generated primary key field. The Search Cat ID/Occ Code field is generated from data in the SearchCatOddCodes table. The subform is used to enter any organizations the person may be tied to and this information is then fed into the Identifier table. The Alternate Billing Address, Alternate Billing City, Alternate Billing State, and Alternate Billing Zip Code are to be used only if the person is associated with one of the organizations that doesn't have its own billing address (I/Pay, I/Dep, etc.) The Org Code field is populated from the Organization table and the People ID is filled in from the automatically generated People ID.

## **DE SearchCatOccCodes**

This is the data entry form for the SearchCatOccCode table. This form is part of the Add Records tab on the Navigation Form as New Search Category/Occupation Code. The Search Cat ID/Occ Code ID field is an automatically generated primary key field.

## **DE SearchDatabase**

This is the data entry form for the SearchDatabase table. This form is part of the Add Records tab on the Navigation Form as New Search Database. The Database ID field is an automatically generated primary key field.

## **DE SearchDeliveryMethod**

This is the data entry form for the SearchDeliveryMethod table. This form is part of the Add Records tab on the Navigation Form as New Search Delivery Method. The Delivery Method ID field is an automatically generated primary key field.

## **DE SearchLog**

This is the data entry form for the SearchLog and the subform is for data entry into the SearchLogDetail tables. This form is part of the Add Records tab on the Navigation Form as New Search Log/Search Log Detail. The Search Log ID is an automatically generated primary key field. The Identifier field is populated by the IdentifierDropdown query while the Search User ID, Search Cat ID/Occ Code ID, and Delivery Method fields are populated by the SearchUsers, SearchCatOccCode, and SearchDeliveryMethod tables, respectively. Within the subform, the Search Log Detail ID is an automatically generated primary key field for the SearchLogDetail table and the Search Log ID field is filled by the Search Log ID field from the main form.

The inclusion of two fields having to do with Citations Found is not an oversight. They both existed in the old version of the database, but could not be rectified because they contained different data for the same record. It is possible one was introduced by mistake at some point, but that is unclear. It would be acceptable to only use one in the future.

## **DE SearchLogSubformSearchLogDetail**

This is the subform used in the DE SearchLog form.

## **DE SearchUsers**

This is the data entry form for the SearchUsers table. This form is part of the Add Records tab on the Navigation Form as New Search User. The Search User ID is an automatically generated primary key field.

## **DE ServiceCodes**

This is the data entry form for the ServiceCodes table. This form is part of the Add Records tab on the Navigation Form as New Service Code.

## **DE Services**

This is the data entry form for the Services table. This form is part of the Add Records tab on the Navigation Form as New Service. The Services ID is an automatically generated primary key field. The Identifier and Service Code fields are populated by data from the Identifier and Service Code tables, respectively. Once an identifier and service code are chosen, the profit and non-profit fees are displayed in addition to whether the organization associated with the identifier is profit or non-profit. The user can then enter the correct fee based on this information. In the future, this process should be automated.

## **DE TOCLink**

This is the data entry form for the TOCLink table. This form is part of the Add Records tab on the Navigation Form as New Table of Contents Link. The TOC Link ID is an automatically generated primary key field. The Publication ID field is populated from data in the Journal table and the People ID table is populated from the People table.

## **Identifier Subform**

This subform is used in the DE People form.

## **Navigation Form**

This is the main form used to navigate all other forms for the user. It has vertical and horizontal navigational tabs for finding the required forms.

## **People/Identifier Subform**

This subform is used in the ViewPeople form.

## **People/Org/Identifier Subform**

This subform is used in the ViewOrganizations form.

## **Report AccessInvoiceCredit(I/)**

This form is used to access the AccessInvoiceCredit(I/) report. It can be found on the Navigation Form under the Account Reports as Access Invoice Credit (I/).

## **Report AccessInvoiceCredit(Org)**

This form is used to access the AccessInvoiceCredit(Org) report. It can be found on the Navigation Form under the Account Reports as Access Invoice Credit (Org).

## **Report ActiveOrInactiveCustomer**

This form is used to access the ActiveInactiveCustomers report. It can be found on the Navigation Form under the Activity Reports as Active/Inactive Customers.

## **Report ActiveOrInactiveOrganizations**

This form is used to access the ActiveInactiveOrganizations report. It can be found on the Navigation Form under Activity Reports as Active/Inactive Customers.

## **Report InterestingSearches**

This form is used to access the Interesting Searches report. It can be found on the Navigation Form under Misc Reports as Interesting Searches.

## **Report LitSearchByCustomer**

This form is used to access the LitSearchByCustomer report. It can be found on the Navigation Form under Service Reports as Lit Search By Customer.

## **Report LitSearchByTopic**

This form is used to access the LitSearchByTopic report. It can be found on the Navigation Form under Service Reports as Lit Search By Topic.

## **Report OrgCodeTotals**

This form is used to access the OrgCodeTotals report. It can be found on the Navigation Form under Service Reports as Organization Code Totals.

## **Report Payments Received**

This form is used to access the Payments Received report. It can be found on the Navigation Form under Account Reports as Payments Received.

## **Report ServicesByCustomer**

This form is used to access the ServiceByCustomer report. It can be found on the Navigation Form under Service Reports as Services By Customer.

## **Report ServicesByOrg**

This form is used to access the ServiceByOrg report. It can be found on the Navigation Form under Service Reports as Services By Organization.

## **Report ServicesByOrganizationSummary**

This form is used to access the ServicesByOrganizationSummary report. It can be found on the Navigation Form under Service Reports as Services By Organization - Summary.

## **Report ServicesForOneOrg**

This form is used to access the ServicesForOneOrg report. It can be found on the Navigation Form under Service Reports as Services for One Organization.

## **Report ServicesForOneOrgSummary**

This form is used to access the ServicesForOneOrgSummary report. It can be found on the Navigation Form under Service Reports as Services For One Organization - Summary.

## **Report TOCLink**

This form is used to access the TOC Link report. It can be found on the Navigation Form under Misc Reports as Table of Contents Link.

## **SearchLog/SearchLogDetail Subform**

This subform is used in the ViewSearchLog/SearchLogDetail form.

## **ViewIdentifier**

This form is used to view records in the Identifier table. It can be found on the Navigation Form under the View/Edit Records tab as View Identifier. The Identifier field is populated with data from the Identifier table and referencing material from the People and Organizations tables. The

Org ID and People ID forms can't be edited from this form. Its main purpose is to allow the user to mark an Identifier as Active or Inactive. The Billing Address, Billing City, Billing State, and Billing Zip Code fields are only to be used by Identifiers that are associated with an organization without its own billing information (I/Pay, I/Dep, etc).

## **ViewJournal**

This form is used to view records in the Journals Table. It can be found on the Navigation Form under the View/Edit Records tab as View Journals. The Select By Publication ID field is used to choose the record to be viewed.

## **ViewJournalFrequency**

This form is used to view records in the Journal Frequency Table. It can be found on the Navigation Form under the View/Edit Records tab as View Journal Frequencies. The Select By Frequency Text field is used to choose the record to be viewed.

## **ViewOrganizations**

This form is used to view records in the Organizations Table. It can be found on the Navigation Form under the View/Edit Records tab as View Organizations. The Select By Org Code field is used to choose the record to be viewed. The subform shows all people associated with the selected Org Code.

## **ViewPeople**

This form is used to view records in the People Table. It can be found on the Navigation Form under the View/Edit Records tab as View People. The Select By Last Name field is used to choose the record to be viewed. The subform shows all organizations that the selected person is associated with.

## **ViewSearchCatOccCodes**

This form is used to view records in the SearchCatOccCodes Table. It can be found on the Navigation Form under the View/Edit Records tab as View Search Categories/Occupation Codes. The Select By Search Category field is used to select the record to be viewed.

## **ViewSearchDatabase**

This form is used to view records in the SearchDatabase Table. It can be found on the Navigation Form under the View/Edit Records tab as View Search Databases. The Select By Database Name field is used to select the record to be viewed.

## **ViewSearchDeliveryMethod**

This form is used to view records in the SearchDeliveryMethod Table. It can be found on the Navigation Form under the View/Edit Records tab as View Search Delivery Methods. The Select By Delivery Method field is used to select the record to be viewed.

## **ViewSearchLog/SearchLogDetail**

This form is used to view records in the SearchLog and SearchLogDetail tables. It can be found on the Navigation Form under the View/Edit Records tab as View Search Log/Search Log

Detail. The Sort By Last Name and Date Requested field is used to choose the record to be viewed. The subform shows any Search Log Detail records related to the selected Search Log.

### **ViewSearchUsers**

This form is used to view records in the Search Users Table. It can be found on the Navigation Form under the View/Edit Records tab as View Search Users. The Select By Name field is used to choose the record to be viewed.

### **ViewServiceCodes**

This form is used to view records in the ServiceCodes Table. It can be found on the Navigation Form under the View/Edit Records tab as View Service Codes. The Select By Service Code field is used to choose the record to be viewed.

### **ViewServices**

This form is used to view records in the Services Table. It can be found on the Navigation Form under the View/Edit Records tab as View Services. The Select By Last Name field is used to choose the record to be viewed.

### **ViewTOCLink**

This form is used to view records in the TOCLink Table. It can be found on the Navigation Form under the View/Edit Records tab as View Table of Contents Link. The Select By Publication and Select By Last Name fields are used to choose the record to be viewed.

## Reports

All reports can be found on the Navigation Form. Their output is tied to the input of the tabs on this form. If the reports are to be opened without using input from these forms, they can only be opened in design view. The input fields are found by the forms specifically on the Navigation Form, which can be seen in calls including [NavigationForm]![NavigationSubform], which can be seen in many queries included in reports.

### **AccessInvoiceCredit(I/)**

**Entry Form:** Account Reports, Access Invoice Credit (Org)

**Input:** Start Date, End Date, Organization

**Output:**

This report shows the Date Filled, Service Description, Unit Price, Qty Filled, First Name, Last Name, and Total for services created between the Start and End Dates entered into the form on the Navigation Form. There are fields in the header that automatically populate with information based on the Identifier chosen in the criteria entry form by pulling information out of the People table.

The Credit Balance at the bottom of the form are calculated using two queries (AccessInvoiceDebit(I/) and AccessInvoiceCredit(I/), which are then put into two text fields that are marked as non-visible. The fields contain the sum of the Credits and Debits for the selected organization which are then used to calculate the Credit Balance (Credit - Debit).

### **AccessInvoiceCredit(Org)**

**Entry Form:** Account Reports, Access Invoice Credit (I/)

**Input:** Start Date, End Date, Organization

**Output:**

This report shows the Date Filled, Service Description, Unit Price, Qty Filled, First Name, Last Name, and Total for services created between the Start and End Dates entered into the form on the Navigation Form. There are fields in the header that automatically populate with information based on the Organization chosen in the criteria entry form.

The Credit Balance at the bottom of the form are calculated using two queries (AccessInvoiceDebit(Org) and AccessInvoiceCredit(Org), which are then put into two text fields that are marked as non-visible. The fields contain the sum of the Credits and Debits for the selected organization which are then used to calculate the Credit Balance (Credit - Debit).

### **ActiveInactiveCustomers**

**Entry Form:** Activity Reports, Active/Inactive Customer

**Input:** Active/Inactive

**Output:**

This report shows the Last Name, First Name, Org Code, and Active/Inactive for all people in the People table. It is simply a list limited by someones activity level.

## **ActiveInactiveOrganizations**

**Entry Form:** Activity Reports, Active/Inactive Organizations

**Input:** Active/Inactive

**Output:**

This report shows the Org Code, Org Name and Active/Inactive for all organizations in the Organizations table. It is simply a list limited by an organizations activity level.

## **InterestingSearches**

**Entry Form:** Misc Reports, Interesting Searches

**Input:** None

**Output:**

This is a list of searches that have the Yes/No field of MarkedInteresting marked as Yes. It shows Search Category/Occupation Code and Topic.

## **LitSearchByCustomer**

**Entry Form:** Service Reports, Lit Search By Customer

**Input:** Start Date, End Date

**Output:**

This report shows the First Name, Last Name, People ID, Date Requested, Date Completed, Search Category/Occupation Code, and Search User Name for Lit Searches performed between the Start and End dates specified on the entry form.

## **LitSearchByTopic**

**Entry Form:** Service Reports, Lit Search By Topic

**Input:** Start Date, End Date

**Output:**

This report shows the Topic, Date Requested, and Search Log ID for Lit Searches performed between the Start and End dates specified on the entry form.

## **OrgCodeTotals**

**Entry Form:** Service Reports, Organization Code Totals

**Input:** Organizations (1 to 10), Start Date, End Date

**Output:**

This report shows the Organization, First Name, Last Name, Service Description, and Quantity Filled for the selected organizations between the start and end dates chosen, separated by Organization and Person. It also shows the sum for each service type and person, and also a grand total for the organization.

## **PaymentsReceived**

**Entry Form:** Account Reports, Payments Received

**Input:** Start Date, End Date

**Output:**

This report shows the Service Description, Date Filled, Org Code, and Total Deposits (Sum of all totals for each Service Description) for payments that have been made between the selected dates. The Service Descriptions shown are hard coded into the query for the report and can easily be changed, if need be. Currently only Invoice sent to A/R and Payment Received are shown.

## **ServicesByCustomer**

**Entry Form:** Service Reports, Services By Customer

**Input:** Start Date, End Date

**Output:**

This report shows the First Name, Last Name, Date Filled, Service Description, Quantity Filled, and Org Code for each service that was performed between the specified dates. It is separated by person and shows the total number of services for that person.

## **ServicesByOrg**

**Entry Form:** Service Reports, Services By Organization

**Input:** Start Date, End Date

**Output:**

This report shows the Org Code, Date Filled, Service, and Quantity filled for all services performed between the specified dates. This is separated by Org Code and has a Total listed for each Organization.

## **ServicesByOrganizationSummary**

**Entry Form:** Service Reports, Services By Organization - Summary

**Input:** Start Date, End Date

**Output:**

This report shows the Org Code, Service Description, and Quantity filled for all service performed between the specified dates. It groups by Organization then Service Description, listing a total for each Service Description and Organization.

## **ServicesForOneOrg**

**Entry Form:** Service Reports, Services For One Organization

**Input:** Organization, Start Date, End Date

**Output:**

This report shows the Organization, Date, Service, Qty Filled, and Organization Total for all services performed between the specified dates.

## **ServicesForOneOrgSummary**

**Entry Form:** Service Reports, Services For One Organization - Summary

**Input:** Organization, Start Date, End Date

**Output:**

This report shows the Organization, Service, and Quantity Filled for all services performed between the specified dates. It is grouped by Service and has a Total for the number of services performed at the bottom.

## **TOCLink**

**Entry Form:** Misc Reports, Table of Contents Link

**Input:** None

**Output:**

This Publication Title, Last Name, First Name, and Organization name for all records in the TOCLink table. It is limited to only show TOCLink records marked as active.