

## Creating the Borrower Extract Report on Facility / ePortal

In order to extract the required borrower information from Facility, you will need to set up a report within Facility. This should not take more than 15 or 20 minutes. This task need only be done once.

Once it is set up it will only take a few minutes to run to generate the file we need.

The following steps describe how to create the report within Facility.

Log into Facility

Select the **Reports** menu from the Top of the screen

Select **Reports** again

In the workform that appears make sure that "Object Type" is **Student**

Click on **Create**

Select **List Report** as the report type

Enter **Scooter Students** as the report name

Now add in the required data fields

Click on the **Contents** button

Scroll down the list until you see **Id**, **click** on it and press the **Add** button

Scroll down the list until you see **Surname**, **click** on it and press the **Add** button

Scroll down the list until you see **Forename**, **click** on it and press the **Add** button

Scroll down the list until you see the label **Class** (with a yellow box beside it)

**Double click** on the **yellow box** to expand the list

Scroll down the list until you see **Course**, **Double click** on the yellow box to expand

Scroll down the list until you see **Code**, **click** on it and press the **Add** button

**Double Click** on the box next to the heading "Student" to go back to the main list

Scroll down the main list until you see **Year**, **click** on it and press the **Add** button

Scroll down the list until you see the label **Class** (with a yellow box beside it)

**Double click** on the **yellow box** to expand the list

Scroll down the list until you see **Code**, **click** on it and press the **Add** button

Scroll down the list until you see **Name**, **click** on it and press the **Add** button

**Double Click** on the box next to the heading "Student" to go back to the main list

Scroll down the list until you see the label **Personal Details** (with a yellow box beside it)

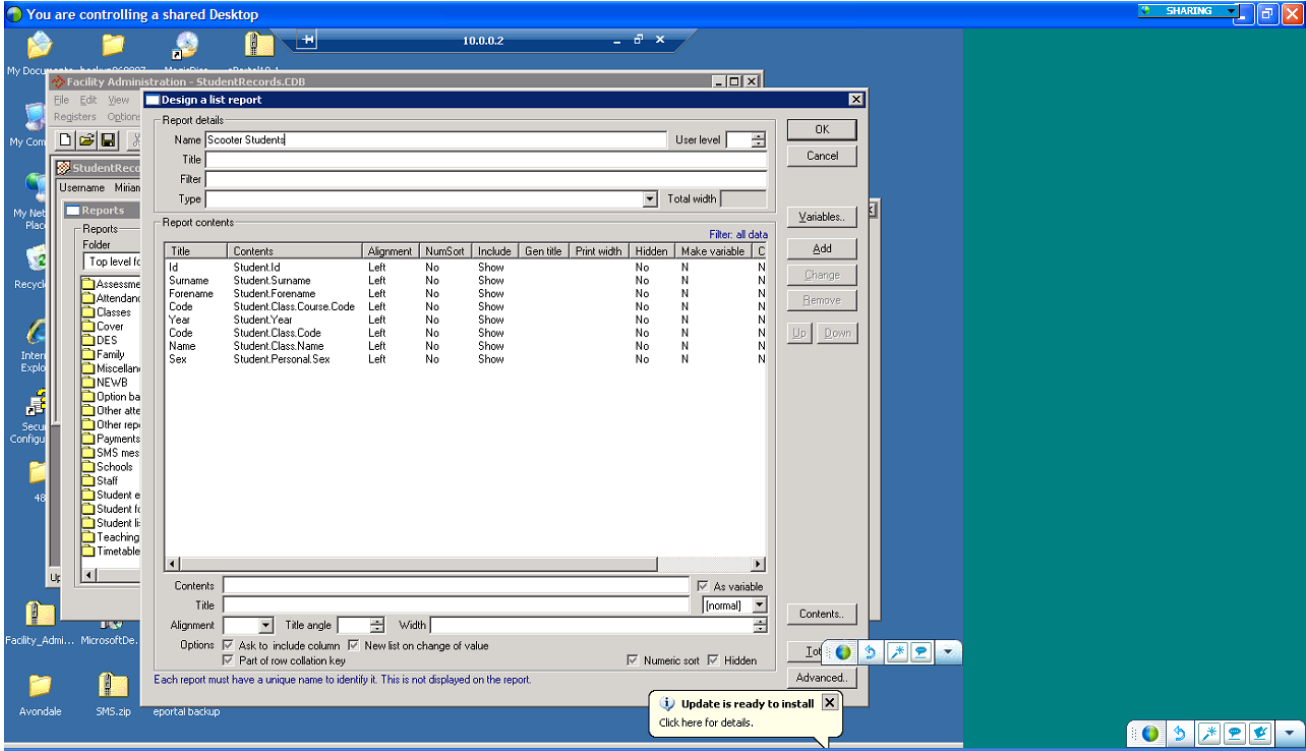
**Double click** on the **yellow box** to expand the list

Scroll down the list until you see **Sex**, **click** on it and press the **Add** button

Then press **Finished**

# JCSP Library Project Digital Library

The screen should look like this when you are finished:



Press **OK** to save the report