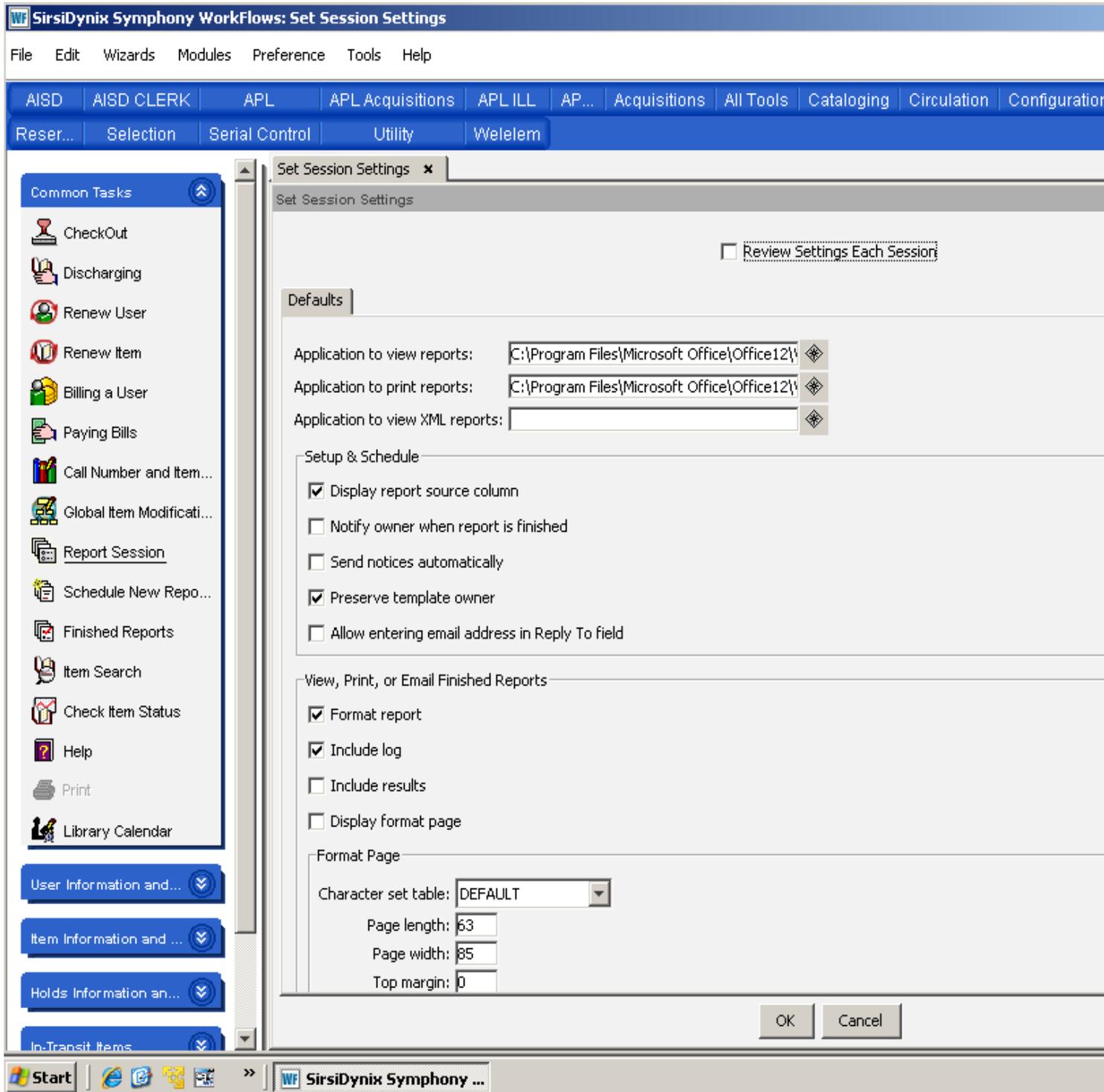


Workflows Reports Training

1. Report Session
2. Schedule New Reports
3. Finished Reports

Report Session



Report Session Configuration

harringtonlc.org

Workflows Help

Report Session Configuration

For Internet Explorer

Click on Report Session,

Beside the Application to view reports: there is a box with a diamond in it (called a gadget)

click on the gadget

use the drop down arrow (or click on Computer on the left side, then double click on the C drive or OS drive)

click on program files (or program files (x86), depending on your operating system)

double click on Internet Explorer

double click on iexplore

This will take you back to the Report Session Screen.

Do exactly the same thing for Application to print reports.

Format Page Change these settings

Page length: 63

Page width: 80

Top Margin: 5

Bottom margin: 5

Click Ok

Then open up Finished Reports.

Once you have a report open you need to set the margins (you only have to do this once)

Click on the tools icon in the upper right corner (looks like a wheel)

Click on Print

Click on Page Setup

Set the margins

Top and Bottom Margins: .5

Left and Right Margins: .75

You probably need to set all Header and Footers to empty.

This should print one patron record per page.

on Windows 7 you may need to adjust the top Margin to 3

For Wordpad

Click on Report Session,

Beside the Application to view reports: there is a box with a diamond in it (called a gadget)

click on the gadget

use the drop down arrow (or click on Computer on the left side, then double click on the C drive or OS drive)

click on program files (or program files (x86), depending on your operating system)double click on Windows NT

double click on Accessories

double click on wordpad

This will take you back to the Report Session Screen.

Do exactly the same thing for Application to print reports.

Format Page Change these settings

Page length: 60

Page width: 80

Top Margin: 3

Bottom margin: 5

Click Ok

Then open up Finished Reports.

Once you have a report open you need to set the margins (you only have to do this once)

Click on File

Click on Page Setup

Set all margins to .5

This should print on patron record per page.

For Microsoft Word

Click on Report Session,

Beside the Application to view reports: there is a box with a diamond in it (called a gadget)

click on the gadget

use the drop down arrow (or click on Computer on the left side, then double click on the C drive or OS drive)

click on program files (or program files (x86), depending on your operating system) double click on Microsoft office

double click on Office 10, 11, 12, or 14

double click on WinWord

This will take you back to the Report Session Screen.

Do exactly the same thing for Application to print reports.

Click Ok

Then open up Finished Reports. You should be able to view your reports now. Let me know if you have any problems.

Settings to try

Report Session settings

Page length 60

Page width 76

Top margin 3

Bottom margin 3

Word settings

All Margins .5

Font New Courier, size 10

Schedule New Reports

1. Templates
2. Bibliographic
3. Circulation
4. My Circulation
5. My Copies
6. My Statistics
7. My Titles
8. Users

Templates

To create a template

Click on the desired Tab

Click on the desired report

Make the desired selections for the report

When you are done, click on Save as Template. The new report template will be in your Templates Tab.

Bibliographic

The Bibliographic group of reports allows you access to your catalog in a report format. The Bibliographic reports accomplish the following tasks.

- Create subject bibliographies
- Count, list and get statistics for bibliographic information
- Print spine labels
- Make global changes to bibliographic data
- Manage discarded items, and identify duplications and errors in the data

There are some reports that are password protected that you will not have access to. The following is a list of these reports.

Edit bibliographic data globally

Export MARC Holdings

Extract Deletions for OCLC

Extract Keys for Marc Export

Remove DELETE Records

Remove DISCARD items

Remove Items by location

Replace subfields in MARC headings

Reset Item Counters

Set Items to DISCARD

URL Checker

URL Update

Run a List Bibliography

Click on List Bibliography

Click on Setup & Schedule or Double Click the report name

Basic Tab

Report name: (name it something you will remember or you can leave it as is)

Description: (there is no need to modify this)

Title: (you can change this if you want to, it prints out at the top of each page of the report)

Footer: (the footer prints at the bottom of each page, add one if you want)

Search String

Search string: (if you want to search for a string in the record it has to be exact)

Click on the Gadget

Enter Strings: (enter one string at a time)

Click on Add

When you are done adding your string(s)

Click on Save

Style Sheet

Currently there is only one style sheet available (prtitem.xml). There is no need to choose the style sheet.

Shadow

Shadow

Yes (if you choose this it will select only items that are shadowed)

No (if you choose this it will select items that are not shadowed)

No is the default selection.

Both (if you choose this it will select both shadowed and un-shadowed items)

Title Selection

Format: (use this only if you know the marc format and want to limit your report by this)

Accountable: Yes, No, Both (Both is the default)

Review record: Yes, No, Both (No is the default)

Date created: (this can be used to limit by the date the title was recreated)

To select a date,

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Created by: (use this only if you want to limit it to the user profile that created the title)

Click on the Gadget

Select the profile name in the left hand column and move it to the right hand column.

Click Ok

Date cataloged (this can be used to limit by the date the title was cataloged)

To select a date,

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Date modified: (this can be used to limit by the date the title was modified)

To select a date,

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Modified by: (use this only if you want to limit it to the user profile that modified the title)

Click on the Gadget

Select the profile name in the left hand column and move it to the right hand column.

Click Ok

Publication year: (this can be used to limit by the publication or copy right date)

Click on = (if you want only a certain year, ex. 1985)

Click on < (if you want all years before a certain year)

Click on > (if you want all years after a certain year)

Click on <>(if you want all years except a certain year)

Click on x-y(if you want a range of years, ex. Between 1985 and 2000)

After you have made your selection click Ok

Number of libraries: (use this if you want to limit it by how many libraries are attached to the title)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of call numbers: (use this if you want to limit it by how many call numbers are attached to the title)

Number of copies on order: (use this if you want to limit it by how many copies are on order for the title)

Number of title holds: (use this if you want to limit it by how title holds are on the title)

Number of total holds: (use this if you want to limit it by the total number of holds)

Shadowed: Yes, No, Both (the default is both)

Call Number Selection

Library: (you can limit it to your library but you do not have to)

Click on the Gadget

Select the library name in the left hand column and move it to the right hand column.

Click Ok

Call number range: (use this to limit the report to a certain call number or range of call numbers)

Click on the gadget

Click on = (to choose an exact call number, ex. FIC ROW)

Click on < (to choose call numbers less than a certain call number)

Click on > (to choose call numbers greater than a certain call number)

Click on x-y (to choose a range of call numbers, ex. Between 000.000 and 099.999)

After you have made your selections click Ok

Class scheme: (use this to limit it to a certain class scheme)

Click on the Gadget

Select the Class Scheme in the left hand column and move it to the right hand column.

Click Ok

Number of copies: (to limit by the number of copies attached to the call number)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of call holds: (to limit by the number of holds attached to the call number)

Number of copies on reserve: (to limit by the number of copies on reserve)

Bound-with: (normally is not used)

Shadowed: Yes, No, Both (the default is both)

Item Selection

Library: (you can limit it to your library or libraries **be sure that you put in at least one library**)

Home location: (use this to limit by home location)

Current location: (use this to limit by current location)

Item type: (use this to limit by item type)

Item category 1: (use this to limit by item category 1)

Item category 2: (use this to limit by item category 2)

(The following should be used for all the above selections)

Click on the Gadget

Select the Data name in the left hand column and move it to the right hand column.

Click Ok

Permanent: Yes, No, Both (the default is both)

Circulate: Yes, No, Both (the default is both)

Extended info: (we do not currently use the extended information fields)

In the shadow catalog: Yes, No, Both (the default is both)

Accountable: Yes, No, Both (the default is both)

Number of pieces: (use to limit by a certain number of pieces)

Date Created: (use to limit by the date created)

To select a date, (use these instructions for all date selections)

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Last activity date: (use to limit by the last activity of the items record)

Distribution key: (normally not used)

Date last charged: (use to limit by the date the items were last charged or checked out)

Date last discharged: (use to limit by the date the items were last discharged or checked in)

Date inventoried: (use to limit by the date the items were inventoried)

Number of times inventoried: (use to limit by the number of times the items were inventoried)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of charges: (use to limit by the number of current charges)

Number of total charges: (use to limit by the total number of charges the items have had)

Number of inhouse charges: (use to limit by the number of inhouse charges the items have had)

Number of copy holds: (use to limit by the number of holds on the items)

Available on hold: Yes, No, Both (the default is both)

Number of bills: (use to limit by the number of bills the items have)

Price: (use to limit by the price that is in the item record)

Reserve status: (not currently used)

Media desk: (not currently used)

Sorting

Sorted by: (There are three options)

author/title (this sorts by the author first then the title)

call number (this sorts by call number, first by Class Scheme, then by call number)

title/author (this sorts by the title first then the author)

Print Item

Printed arrangement: (you will normally select Record by record)

Output format: Standard, Pipe Delimited, XML (the default is Standard)

Record per page (is normally not selected)

Title Information

Normally you will select First Call number, Publication year, Entry list

Entry list: (normally you will just type in 100,245; but you can use the gadget)

Call Number Information

Normally you will select No call number information

Item Information

Normally you will select Brief copy information

When you are ready you can Schedule, Run Now, or Save As Template

Circulation

These reports provide information about the circulation of library materials to your library users, in addition to providing a means for notification and billing. This report group is closely related to the User Group Reports.

The Circulation reports accomplish the following tasks.

- Count, list, and produce statistical information about item charges, bills and holds
- List users with charges, bills and holds
- Produce notices to mail to users who have purchase requests, holds, bills, and charges
- Produce statements to mail to users who have patron credit accounts
- Remove bills and holds
- Mark holds INACTIVE that have expired on the Holds shelf or that have expiration dates that have passed
- Process items that are long overdue or are assumed to be lost
- Print circulation tables and provide cash reports for bill payments at circulation workstations
- Print a list of titles that have a certain ratio of holds to copies for the library to consider purchasing additional copies
- Modify user records to allow telephone notification software to select users for phone notices

There are some reports that are password protected that you will not have access to. The following is a list of these reports.

Assumed lost report

Discharge BW ebooks

Edit Due Dates Globally

Expire Available Holds

Expire Holds

Final Bill Notice

Generalized Bill Notices

Hold Overdue Notices

Hold Pickup Notices

New Overdue Notices

Notice for Cancelled Holds

Notify Users Wanting Text Messages

Notify User via Phone

Overdue Notice

Process Long Overdue Items

Purge Charge History

Purge Inactive Holds

Remove Bills

Remove Paid Bills

User Credit Transaction Activity

Run a List Charges

Click on List Charges

Click on Setup & Schedule or Double Click the report name

Basic Tab

Report name: (name it something you will remember or you can leave it as is)

Description: (there is no need to modify this)

Title: (you can change this if you want to, it prints out at the top of each page of the report)

Footer: (the footer prints at the bottom of each page, add one if you want)

Style Sheet

Currently there is only one style sheet available (prtcharge.xsl). There is no need to choose the style sheet.

Charge Selection

Library: (you can limit it to your library or libraries **be sure that you put in at least one library**)

Current location: (use this to limit by current location)

(The following should be used for all the above selections)

Click on the Gadget

Select the Data name in the left hand column and move it to the right hand column.

Click Ok

Date charged: (use to limit by the date charged or checked out)

To select a date, (use these instructions for all date selections)

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Date due: (use to limit by the date due)

Overdue: Yes, No, Both (the default is both)

Accrued fine: (use to limit by the amount of fines that have accrued so far)

Date renewed: (use to limit by the date an item was renewed)

Number of renewals: (use to limit by the number of times an item as been renewed)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of unseen renewals: (normally not used)

Date claims returned: (use to limit the date an item was claims returned)

Date recalled: (normally not used)

Date notice sent: (use to limit by the date a notice was sent)

Number of overdue notices: (use to limit by the number of overdue notice sent for an item)

Number of recall notices: (normally not used)

Circulation rule: (use to limit by the circulation rule use at the time the item was checked out, normally not used)

Status: ACTIVE, INACTIVE (this is the status of the checkouts)

Charge associated w/ user group: Yes, No, Both (the default is both)

User Selection

Normally this tab isn't used because we are a multi library system and selections are made on the Charge Selection tab.

User Status Selection

Normally this tab isn't used.

Item Selection

Library: (you can limit it to your library or libraries **be sure that you put in at least one library**)

Home location: (use this to limit by home location)

Current location: (use this to limit by current location)

Item type: (use this to limit by item type)

Item category 1: (use this to limit by item category 1)

Item category 2: (use this to limit by item category 2)

(The following should be used for all the above selections)

Click on the Gadget

Select the Data name in the left hand column and move it to the right hand column.

Click Ok

Permanent: Yes, No, Both (the default is both)

Circulate: Yes, No, Both (the default is both)

Extended info: (we do not currently use the extended information fields)

In the shadow catalog: Yes, No, Both (the default is both)

Accountable: Yes, No, Both (the default is both)

Number of pieces: (use to limit by a certain number of pieces)

Date Created: (use to limit by the date created)

To select a date, (use these instructions for all date selections)

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Last activity date: (use to limit by the last activity of the items record)

Distribution key: (normally not used)

Date last charged: (use to limit by the date the items were last charged or checked out)

Date last discharged: (use to limit by the date the items were last discharged or checked in)

Date inventoried: (use to limit by the date the items were inventoried)

Number of times inventoried: (use to limit by the number of times the items were inventoried)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of charges: (use to limit by the number of current charges)

Number of total charges: (use to limit by the total number of charges the items have had)

Number of inhouse charges: (use to limit by the number of inhouse charges the items have had)

Number of copy holds: (use to limit by the number of holds on the items)

Available on hold: Yes, No, Both (the default is both)

Number of bills: (use to limit by the number of bills the items have)

Price: (use to limit by the price that is in the item record)

Reserve status: (not currently used)

Media desk: (not currently used)

Call Number Selection

Library: (you can limit it to your library but you do not have to)

Click on the Gadget

Select the library name in the left hand column and move it to the right hand column.

Click Ok

Call number range: (use this to limit the report to a certain call number or range of call numbers)

Click on the gadget

Click on = (to choose an exact call number, ex. FIC ROW)

Click on < (to choose call numbers less than a certain call number)

Click on > (to choose call numbers greater than a certain call number)

Click on x-y (to choose a range of call numbers, ex. Between 000.000 and 099.999)

After you have made your selections click Ok

Class scheme: (use this to limit it to a certain class scheme)

Click on the Gadget

Select the Class Scheme in the left hand column and move it to the right hand column.

Click Ok

Number of copies: (to limit by the number of copies attached to the call number)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of call holds: (to limit by the number of holds attached to the call number)

Number of copies on reserve: (to limit by the number of copies on reserve)

Bound-with: (normally is not used)

Shadowed: Yes, No, Both (the default is both)

Title Selection

Format: (use this only if you know the marc format and want to limit your report by this)

Accountable: Yes, No, Both (Both is the default)

Review record: Yes, No, Both (No is the default)

Date created: (this can be used to limit by the date the title was recreated)

To select a date,

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Created by: (use this only if you want to limit it to the user profile that created the title)

Click on the Gadget

Select the profile name in the left hand column and move it to the right hand column.

Click Ok

Date cataloged (this can be used to limit by the date the title was cataloged)

To select a date,

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Date modified: (this can be used to limit by the date the title was modified)

To select a date,

Click on the Gadget

Click; On, Before, After, Range, No date, or Any

Click on the Gadget beside; Use data for this date:

Select the date or range you need.

Click Ok

Click Ok

Modified by: (use this only if you want to limit it to the user profile that modified the title)

Click on the Gadget

Select the profile name in the left hand column and move it to the right hand column.

Click Ok

Publication year: (this can be used to limit by the publication or copy right date)

Click on = (if you want only a certain year, ex. 1985)

Click on < (if you want all years before a certain year)

Click on > (if you want all years after a certain year)

Click on <>(if you want all years except a certain year)

Click on x-y(if you want a range of years, ex. Between 1985 and 2000)

After you have made your selection click Ok

Number of libraries: (use this if you want to limit it by how many libraries are attached to the title)

(The following should be used for all the Number of selections)

Click on the gadget

Click on =(for an exact number)

Click on < (for any number less than a certain number)

Click on > (for any number greater than a certain number)

Click on <> (for any number not equal to a certain number)

Click on x-y (for any number between two numbers, ex. Between 1 and 5)

Number of call numbers: (use this if you want to limit it by how many call numbers are attached to the title)

Number of copies on order: (use this if you want to limit it by how many copies are on order for the title)

Number of title holds: (use this if you want to limit it by how title holds are on the title)

Number of total holds: (use this if you want to limit it by the total number of holds)

Shadowed: Yes, No, Both (the default is both)

Sorting

Sorted by: (there are four options)

call number (this sorts by call number, first by Class Scheme, then by call number)

title/author (this sorts by the title first then the author)

user ID (this sorts by user ID)

user name (this sorts by users last name, then the users first name)

Print Charge

This is normally not used, but if you select the XML output it will output in XML format

When you are ready you can Schedule, Run Now, or Save As Template

My Circulation

The My Circulation group of reports provides information about the circulation of library materials to your library users. The My Circulation reports accomplish the following tasks.

- * Count, list, and produce statistical information about item checkouts, bills and holds
- * List users with checkouts, bills, holds, and overdue items
- * Provide daily and monthly cash reports for bill payments at circulation workstations

There are some reports that are password protected that you will not have access to. The following is a list of these reports.

Expire Available Holds

Expire Holds

Purge Inactive Holds

These reports are run basically the same as the Circulation group of reports.

My Copies

The My Copies group of reports allows you to review your copy inventory. The My Copies reports accomplish the following tasks.

- * Run reports for the purpose of collection development or weeding
- * Count copies in full collection
- * List various copies by the funding source used to purchase the material.

There are no reports password protected in this tab.

My Statistics

The My Statistics group of reports is used to produce circulation counts for total checkouts and renewals. The My Statistics reports accomplish the following tasks.

- Produce hourly circulation counts for the total checkouts and renewals of items within a given call number range
- Produce total circulation counts for the total checkouts and renewals of items within a given call number range
- Produce daily, monthly, and weekly statistics for particular item and user characteristics

There are no reports password protected in this tab.

My Titles

The My Titles Group of reports help staff maintain bibliographic control over the collection. The My Titles reports accomplish the following tasks.

- Calculate the average price of selected items

- Calculate the average publication year of selected items
- Count items in catalog based on various item characteristics
- Produce various bibliographic listings of titles in the catalog
- Provide lists of lost items, shadowed titles, and titles with no copies
- Provide lists of new titles added to the catalog based on various item characteristics
- Provide shelflist reports based on various item characteristics
- Print spine and pocket labels for recently added items

There are no reports password protected in this tab.

These reports are run basically the same as the Bibliographic Group of Reports

User

User reports provide information specific to the users of your library. These reports are closely related to the Circulation Group Reports. The User reports are useful in the following types of situations.

- Maintain users' delinquency status, privilege expiration, and remove batches of user records
- Count, list, and produce statistical information about your library's users
- Print user ID and address labels
- Produce general announcement notices to mail to all or selected users
- Manage user suspension records

There are some reports that are password protected that you will not have access to. The following is a list of these reports.

Remove All Expired Suspensions

Remove Users

Set User Expiration Date

Update Select User Delinq Stat

Update User Delinquency Status

Update User Status

These reports are run basically the same as the Circulation group of reports.

Finished Reports

To view finished reports

Click on Finished Reports

Highlight the report you want to view

Click on View

Uncheck View Log

Click OK

Then you can print it or save it to your computer.

Workflows Function Key Wizard

F1	Help
F2	Display User
F3	Item Search
F4	Discharging
F5	Checkout
F6	
F7	Renew User
F8	
F9	Place Hold
F10	
F11	User Registration
F12	Print

Shift + function key

F1	Add Brief Title
F2	Display Item Holds
F3	Trap Holds
F4	Inventory Item
F5	
F6	Change Item ID
F7	
F8	Paying Bills
F9	Display User Holds
F10	
F11	Modify User
F12	Remove User

Shift + Alt + function key

F1	
F2	Delete Title, Call Numbers...
F3	Send Message
F4	Modify Due Dates
F5	Mark Item Used
F6	
F7	Ephemeral
F8	User Lost Card
F9	
F10	Copy User
F11	Pending Transits
F12	Receive Transit

Alt + function key

F1	
F2	Modify Holds for Item
F3	Remove Item Hold
F4	
F5	Mark Item Lost
F6	Discharging Bookdrop
F7	User Claims Returned
F8	Billing a User
F9	Remove User Hold
F10	
F11	Confirm Address
F12	Renew Privilege