WorkFlows Reports Training

The Symphony WorkFlows client includes a Reports module. In Symphony terminology, "reports" is a broad term that includes counts of records, lists, notices, transaction statistics, and even some maintenance routines. In this training you will learn what reports are available and how to run the reports to get the information you need.

The WorkFlows Reports Module consists of three main Wizards

1. Schedule New Reports - lists the reports that are available to you to run whenever you need to or to allow you to set them up to be run automatically on a certain schedule

2. Scheduled Reports - lists the reports that someone has already set up to be run automatically on a certain schedule.

3. Finished Reports - lists documents that have resulted from each run of a report, whether it was started manually or scheduled automatically. Finished reports, depending on each report's settings, may be formatted as plain text reports, pipe-delimited reports (can be viewed as text or imported into Excel), or XML reports (that can be viewed in Excel). Text reports, such as notices, may output formatted to print on a specific paper size using specific margins and fonts.

Report Session

Report Session Configuration

harringtonlc.org
Workflows Help
Report Session Configuration

For Browser

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, Google, Edge, Mozilla
double click on iExplorer, Chrome, Edge, Mozilla
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 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 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, if you have 365 it is root, then Office 15 or 16
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 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.xsl). 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.