SirsiDynix Symphony 3.2

Reports Training Guide

DOC-REPTGEN-S

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Introduction

Training Overview

The SirsiDynix Symphony Reports Training course is designed to provide a basic understanding of the Symphony Reports capabilities and an overview of navigation functions in the WorkFlows client.

About This Course

Who should attend?

This course is intended for system administrators and other library staff who want to learn how to collect information from the Symphony system.

Prerequisite

Essential Symphony Skills – This course teaches basic skills including navigating Symphony, searching, modifying a toolbar, keyboard navigation, using the Online Help, and an overview of wizards.

Course Objectives

After completing this course, participants will be able to:

- Navigate the Symphony interface using either a mouse or keyboard commands.
- Identify reports toolbar wizards and understand the functionality of each.
- Run a report.
- Create a report template.
- Distinguish between report types.
- Determine appropriate report type to run to meet job objectives.
- Interpret report logs/results and identify errors.

Reports Overview

Reports Overview

In this chapter you will learn about report functions and report types. You will also learn about the Report wizard properties, toolbar, wizards, and helpers.

Before You Begin

Before you can view or print finished reports, computers where WorkFlows is installed must have a temporary folder (usually *C:\temp*).

To verify that you have a temp folder in the C drive directory, go to **Windows Explorer**. If you do not have a temp folder, you will need to create one. To do this, go to the **File** menu and click **New**, and then click **Folder**. Name the new folder **Temp**.

Report Functions

SirsiDynix defines reports to include any process that can be scheduled in Symphony. Reports in SirsiDynix Symphony can improve the functioning of a library. You can perform the following tasks more easily with reports.

- Track statistical and management information by counting various staff processes to measure productivity, identifying items that are likely candidates for weeding, or tracking fund information for budgeting.
- Streamline daily library processes by creating bibliographies, sending overdue notices to users, comparing the catalog shelflist to the items on the shelf, or generating vendor claim lists or orders.
- Perform housekeeping tasks by updating catalog indexes, changing the status of groups of users, or removing users or items in batches when necessary.

Symphony reports are organized into general groups, with specific report types in each group. Although you can use many reports as they are, you can tailor a basic report to meet your specific needs.

Once you select a report and have made formatting decisions, the report can be scheduled to run immediately, periodically, or saved as a report template to be run later. Reports can be printed, e-mailed, viewed, or saved as a text file (usually in WordPad).

Report Types

All Symphony reports fall into one of the following report types.

Count

Count reports answer the question, “How many meet these criteria?” Examples of this type of report are Count Bills, Count Charges, and Count Items.

Import/Export

Import/export reports batch-load new information to the Symphony system or extract Symphony information for use by an external system. Examples of this type of report are Load Bibliographic Records and Load Authority Records.

Label

Label reports produce information in a format used for printing labels. Examples of this type of report are Vendor Address Labels and Added Item Labels.

List

List reports answer the question, “Which ones meet these criteria?” It is one of the most customizable types of report. Examples of the list type of report are List Users, List Items, and List Order Line Items.

Maintenance

Maintenance reports make changes to existing information in the Symphony system. Examples of this type of report are the rollover series in the Acq group, the Add, Delete, Update Databases report, and the Reorganize and Rebuild reports.

Notice

Notice reports answer the question, “Who needs what information sent to them?” It selects the users or vendors to receive the notice and the notice text, and can be e-mailed directly to users and/or have address labels printed. Examples of this type of report are Vendor Acquisition Claims, User Announcement, and Overdue Notices.

Remove

Remove reports permanently remove information from the Symphony system. Caution is advised when running reports of this type, and in many cases, these reports are password protected. Examples of the remove type are Remove Users and Remove Bills.

Statistics

Statistics reports produce tables of statistical information from the Symphony system. Examples of the statistics type include Transaction Statistics, Average Price of Books, and Count Users.

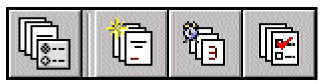
Reports Toolbar, Wizards, and Helpers

Reports Toolbar and Wizards

Classic

The layout of Reports Wizards and Helpers is determined by the client desktop settings. To change the way wizards are displayed, select Preference, Desktop, and Desktop Setup from the menu.

When the Classic view is chosen, only wizard icons appear by default.



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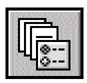
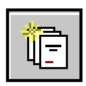
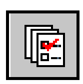


Session Settings – Set the default values for the Report wizards.



Schedule New Reports – Creates a new report.

Scheduled Reports – Displays reports that have been created, but are scheduled to run in the future or periodically. This wizard can be used to modify, duplicate, remove, or change the way a report is run.

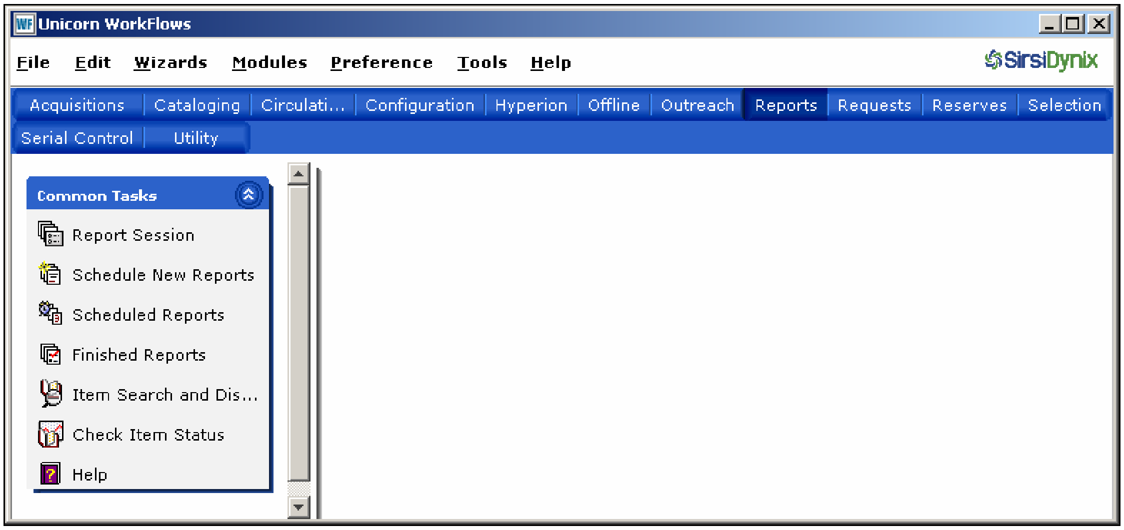


Finished Reports – Displays the results of reports that have finished running. Printing and removing report results are among the other options.

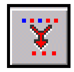
Themes

In a Themes view, wizard icons and their description appear. In this manual, screen shots shown appear in the Themes view labeled Primary Blue.

Complete functionality is available in both Themes and Classic desktop views.


Unicorn WorkFlows
File
Edit
Wizards
Modules
Preference
Tools
Help
SirsiDynix
Acquisitions
Cataloging
Circulati...
Configuration
Hyperion
Offline
Outreach
Reports
Requests
Reserves
Selection
Serial Control
Utility
Common Tasks
Report Session
Schedule New Reports
Scheduled Reports
Finished Reports
Item Search and Dis...
Check Item Status
Help

Reports Helpers



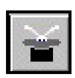
Filter – Filters reports to display only those specified in the filter screen area.

Reports can be sorted by report owner, report completion date, report name, or next run date. Only Symphony administrators can sort by report owner, but other options are available to general library staff. You can order reports to display in ascending or descending order.

Selected filter and sort settings will remain throughout a Symphony session or until changed, and will carry over to the templates and converted and scheduled reports. Click **Clear** to return the settings to the default.

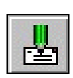
Display Report Scheduler Status – Displays scheduled reports if the report scheduler is running. The report name, owner, and date/time that the report began running display.

This helper is available in the Scheduled Reports and Finished Reports wizards and the templates display of the Setup and Schedule New Reports wizard.



Refresh Report List – Checks for any new reports that were created or completed after the lists were first displayed. If the window has been idle for a while, any changes to the list will display. Using this helper increases efficiency and helps keep the desktop clean.

This helper is available in the Scheduled Reports and Finished Reports wizards.

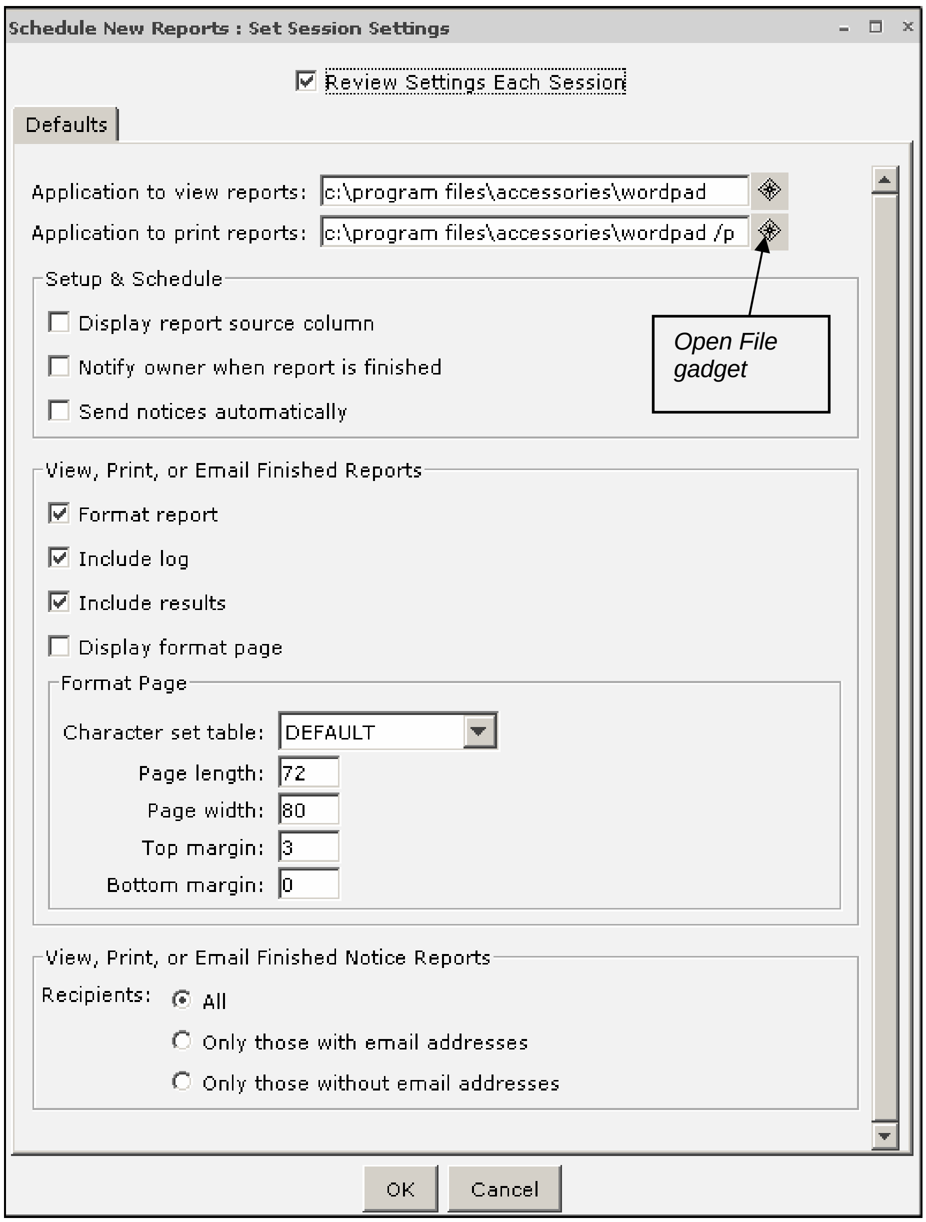


Notices – Can be used to display and modify notice text files. This helper is only available on the Distribution Notice tab of notice reports. The display of this helper is controlled by a property setting.

Fixed Format Manager - This helper appears on the Finished Reports wizard and is used to access pipe delimited output.

Report Wizard Properties

All report wizards—Schedule New Reports, Scheduled Reports, and Finished Reports—use the same properties page, set in the Session Settings wizard on the Reports toolbar. Symphony retains modifications made to the properties for all wizards for the duration of the WorkFlows session. The more commonly used settings are discussed on the following pages. For more information on the properties, refer to the WorkFlows Online Help.



Application to View Reports

When you click **View,** the program entered in this field to view templates, scheduled reports, and finished reports is started. The report displays in the document window, and can be printed or saved from the application.

If the program you want is not installed in the C:\Program Files\Windows NT\Accessories directory, you must type the full path to the executable file. If needed, you can locate the executable for the application using the Open File gadget.

Setup & Schedule

Send notices automatically

This field applies to notice reports only. You must define an e-mail address in the appropriate field of the user record for notices to be automatically sent.

View, Print, or Email Finished Notice Reports

Recipients

If you select the Send Notices Automatically option, notices will automatically be sent to the email address in each user's record. If notices are sent automatically, you may want to separate e-mail and non e-mail recipients to prevent sending duplicate paper notices, particularly if the Count as Notice Sent option is used to keep track of the notices each user received.

You have three options for recipients.

- All
- Only those with email addresses
- Only those without email addresses

NOTES You can change the setting for Format Finished Report before viewing, e-mailing, or printing the report.

Log and result settings carry over to the selections when working with finished reports.

Scheduling New Reports

Overview

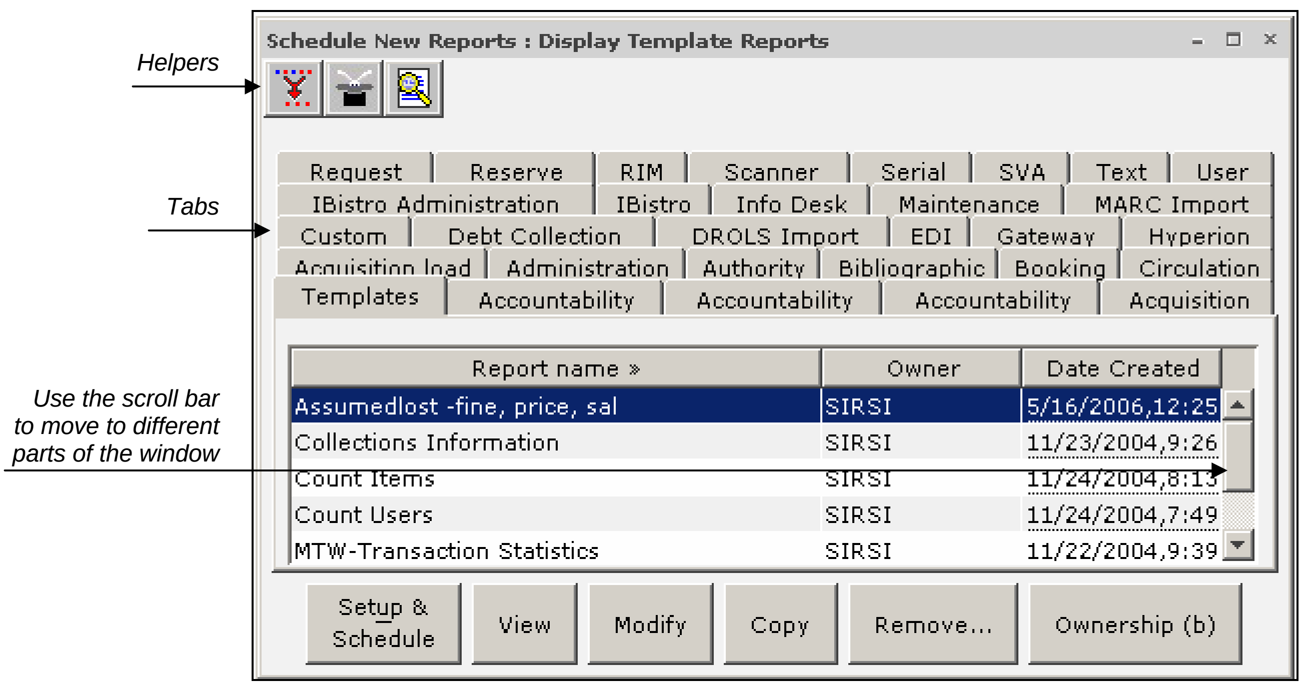
In this chapter, you will learn how to create new reports using the Schedule New Reports wizard. You will also learn about report templates and the Schedule New Reports wizard tabs.

Schedule New Reports Wizard

The Schedule New Reports wizard is used to create a new report.

Templates

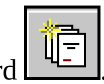
When you use the Schedule New Reports wizard, the Templates tab displays a list of reports based on generic SirsiDynix-delivered reports that were modified by library staff. If there are no templates saved, the tab does not display.



You should save a report as a template under the following circumstances.

- If the report is needed one or more times in the future, but you do not want it to run automatically at a specified date and time.
- If you want to run a series of similar reports, changing only one or two selections or output options at a time.

How do I save a report as a template to be used later?

1. Click the **Schedule New Reports** wizard .
2. Select a report to be scheduled that is most like the report you want.
3. Click **Setup & Schedule**.
4. Make any changes to the report.
5. Click **Save As Template** to place the report that you created into the Templates tab of the Schedule New Reports wizard.
6. A confirmation message appears. Click **OK** to return to the report groups.
7. After you save the template, you can schedule a new report, display scheduled reports, or close the wizard.

NOTE You must schedule the report to run using the Schedule New Reports wizard. The report template that you just created will not run without scheduling the new report.

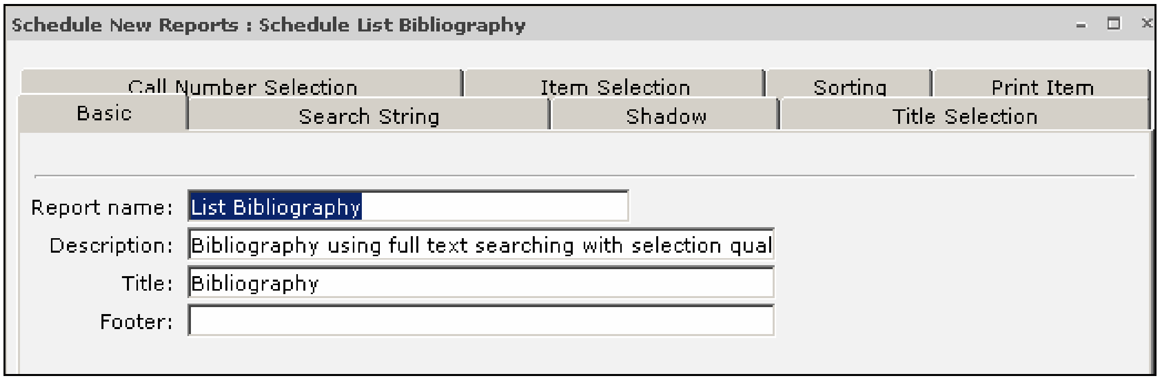
Scheduling a New Report

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. On the **Templates** tab, select a template (or select a generic Symphony report from another tab) that you want to base the new report on and click **Setup & Schedule**. The Schedule New Reports window appears.
3. Define any format information to be included in the report and click **Schedule**.
4. Determine when the report will run and click **OK**.

Schedule New Reports Wizard Tabs

The Basic Tab

Every report has the same Basic tab. The following fields may have default values, but they can be edited.



Report name

This 30-character name displays in the finished or scheduled report lists and on the report log. If this report is saved as a template, the report name displays on the Template tab.

Description

This field describes the report results. The default value describes the report if it runs without making any changes to selections or output options.

Title

The title in this field displays on the first line of each formatted page of the printed report. The date and time that the report was produced follows the title.

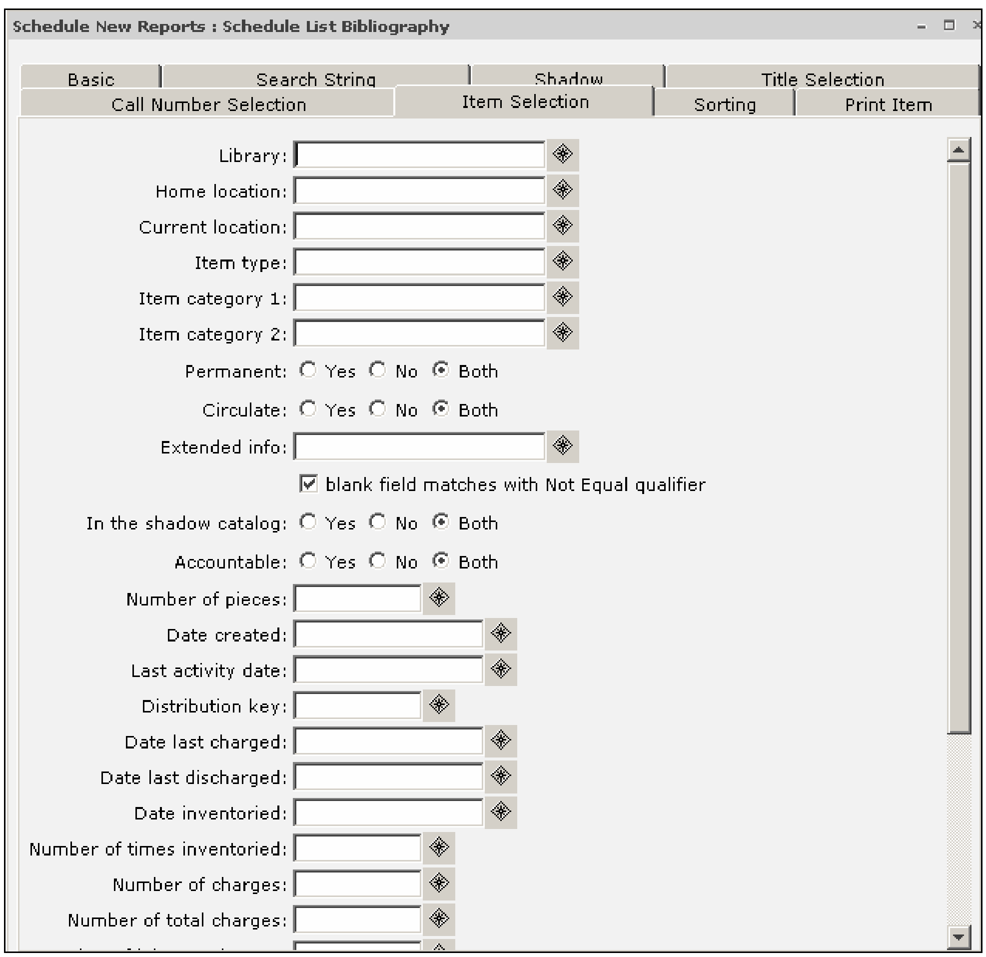
Footer

When used, this optional field displays on the last line of each formatted page of the printed report. It can be used to record a date or range of dates that a report covers.

It’s helpful to modify information in the Basic tab in a multi-library setting where staff members are running the same types of reports. Maria and Cherise, for example, run the List Bibliography report on a regular basis, but set up their reports differently for their respective libraries. Changing information in the Basic tab makes it easier to distinguish reports from one another.

Selection Criteria

Making selections in the tabs associated with a report limits the amount of data that will be output in this report. The List Bibliography report, for example, is used to output information about bibliographic records in the catalog. Before any selections are made in the Title Selection or Call Number Selection tab, the report is set up to list every bibliographic record in the catalog. Because this is impractical output, you should make selections to only output a subset of all bibliographic records, for example—the output could contain all records that have the word Halloween in the 650 tag of the bibliographic record.



NOTE Keep in mind that it is not necessary to make selections in every available field on the tabs.

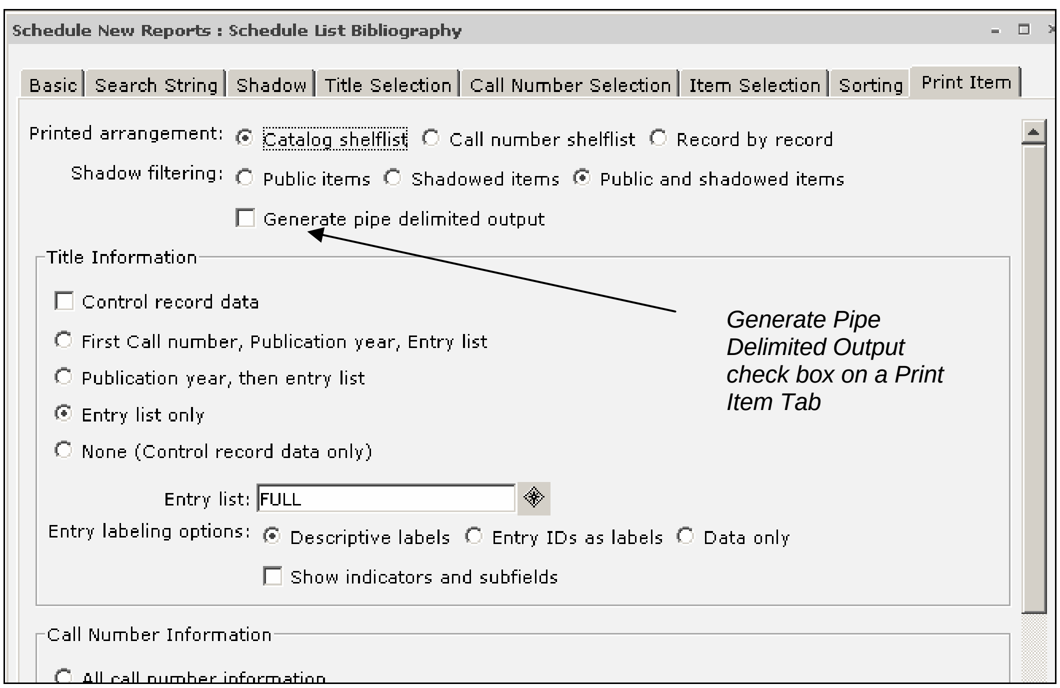
Sorting Tab

This option is available in some reports, particularly lists and notices, when it may be beneficial to have various options for sorting report results. To make sorting selections, you can use the Sorted by drop-down list. The Sorted by options vary by report.

Report Output

Based on available output options, the appearance and content of Symphony reports can vary significantly. Selections along with output options are used to design a custom report to meet individual library needs.

Options in this phase of the report influence what information is included in the printed report results and in what format. Most report results default to include general information that can be expanded by making more selections on the available output tab, such as Print Item, Print Invoice, and others.



In Sirsidynix Symphony 3.2 a selection is available to select a pipe delimited output. When the Generate Pipe Delimited Output check box is checked, results will output to a pipe-delimited file which can be accessed through the Fixed Format Manager helper and exported to a third-party application, such as a spreadsheet application. If the check box is cleared, report results will print as usual, only in a text format. The following tabs will display this option.

- Bill Notice Tab
- Circulation Mailer Tab
- Hold Notice Tab
- Charge Notice Tab
- Print Item Tab
- General Notice Tab

Displaying Finished Reports

Overview

In this chapter, you will learn how to display finished reports using the Finished Reports wizard. You will also learn how to verify reports and remove, view, print, and e-mail finished reports.

Finished Reports Wizard

The Finished Reports wizard is used to view all reports that have been run. You can view, print, e-mail, or save finished reports.

Keep in mind that users with public services or technical services access can only view reports run by users with the same login, for example— users with a CIRC login can only view reports run by users with a CIRC login. System administrators can see reports run by any user regardless of user access.

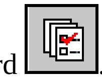
If a report needs to be viewed by another user login, the system administrator can modify the ownership of a report.

1. Click **Ownership** on the Display Finished Reports window. The Change Owner window appears.
2. Select a new owner option from the drop-down list of existing user logins.

   -Or-

   Select **Other** and type a user login in the following box.
3. Click **OK** to return to the Display Finished Reports window.

Displaying a Finished Report

1. Click the **Finished Reports** wizard .
2. Scroll through the reports until you find the one that you want to review and select it.
3. After selecting a report, you can use the **View**, **Print**, or **Email** buttons to determine how it will be distributed.
4. To view or print, in the View Finished Reports window, use the check box options to select the display of the log and/or results.

   -Or-

   To e-mail, enter to and from e-mail addresses in the appropriate boxes.
5. Select **Format Report** to display the report in Symphony format.
6. When a report has been printed or e-mailed, you can review the report again, display finished reports, or close the Finished Reports wizard.

For more information, see pages 24 to 28.

Notes

- The Finished Reports wizard will list up to 2,000 reports.
- You can use the **Filter** helper to limit and sort the display.
- You can use the **Remove** button to remove one or more finished reports from the list.
- Although you do not have an option to download a finished report, you can use the **Save As** option on the **File** menu of the program used to view and/or print reports.

Verifying Reports

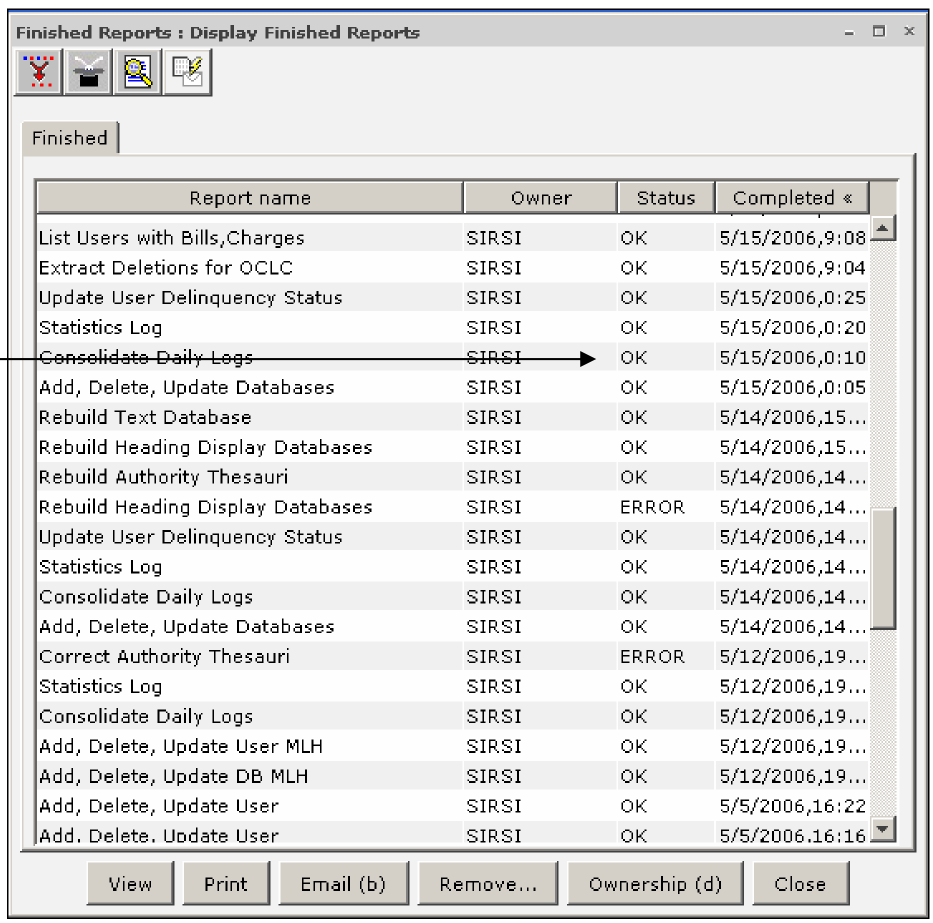
You should verify that all reports, especially required maintenance reports, ran without error on a daily basis. If a report encountered an error, notify your library's Symphony administrator.

CAUTION **If a required maintenance report has the status of ERROR, do not remove the report from the finished list. The library's Symphony administrator will contact SirsiDynix's Client Care Center and take the recommended steps.**

To verify that a report ran without error

1. Click the **Finished Reports** wizard. The Display Finished Reports window appears.

Finished report status

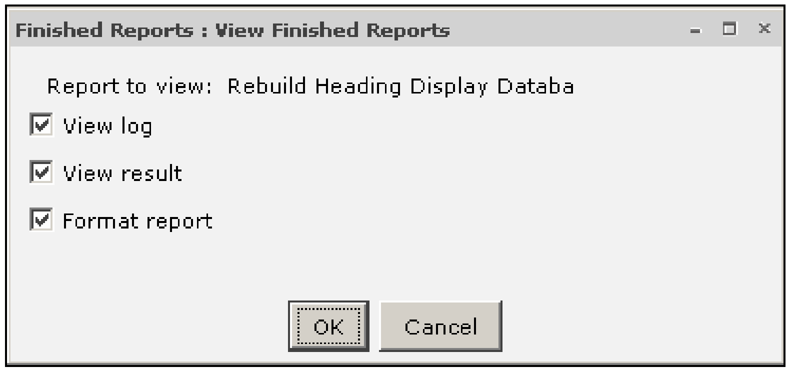

Finished Reports : Display Finished Reports

Finished

Report name	Owner	Status	Completed «
List Users with Bills,Charges	SIRSI	OK	5/15/2006,9:08
Extract Deletions for OCLC	SIRSI	OK	5/15/2006,9:04
Update User Delinquency Status	SIRSI	OK	5/15/2006,0:25
Statistics Log	SIRSI	OK	5/15/2006,0:20
Consolidate Daily Logs	SIRSI	OK	5/15/2006,0:10
Add, Delete, Update Databases	SIRSI	OK	5/15/2006,0:05
Rebuild Text Database	SIRSI	OK	5/14/2006,15...
Rebuild Heading Display Databases	SIRSI	OK	5/14/2006,15...
Rebuild Authority Thesauri	SIRSI	OK	5/14/2006,14...
Rebuild Heading Display Databases	SIRSI	ERROR	5/14/2006,14...
Update User Delinquency Status	SIRSI	OK	5/14/2006,14...
Statistics Log	SIRSI	OK	5/14/2006,14...
Consolidate Daily Logs	SIRSI	OK	5/14/2006,14...
Add, Delete, Update Databases	SIRSI	OK	5/14/2006,14...
Correct Authority Thesauri	SIRSI	ERROR	5/12/2006,19...
Statistics Log	SIRSI	OK	5/12/2006,19...
Consolidate Daily Logs	SIRSI	OK	5/12/2006,19...
Add, Delete, Update User MLH	SIRSI	OK	5/12/2006,19...
Add, Delete, Update DB MLH	SIRSI	OK	5/12/2006,19...
Add, Delete, Update User	SIRSI	OK	5/5/2006,16:22
Add, Delete, Update User	SIRSI	OK	5/5/2006,16:16

View | Print | Email (b) | Remove... | Ownership (d) | Close

2. Note the Status column. There are two report statuses:
   - **OK** – Indicates that the report was finished.
   - **ERROR** – Indicates that the report was unable to finish. Do not remove this report. If ERROR is displayed in the status column, notify your library's Symphony administrator.
3. Select a report with an error status and click **View**. A View Finished Reports window appears.



4. Select or clear the options you want and click **OK**. The selected finished report will open in WordPad or another designated word processing program.
5. Scan report logs for the words "error" or "abnormally."

You can use the word processing program's Find feature to search for the word "error" or "abnormally."

Removing Finished Reports

The Remove option allows you to remove finished reports. You should remove unneeded finished reports to recover disk space and reduce the clutter on a weekly basis.

Guidelines

When removing unneeded finished reports, follow these guidelines.

- Remove finished maintenance reports, as well as unneeded finished reports run by staff.
- When removing finished required maintenance reports, retain reports dated from the latest two days in the list. If subsequent reports run in ERROR, the Client Care Center may want information from the reports finished in the few days before the error.
- Do not remove a report that is the subject of a Client Care Center call until the call is resolved.
- Remove all finished reports that are older than two weeks.

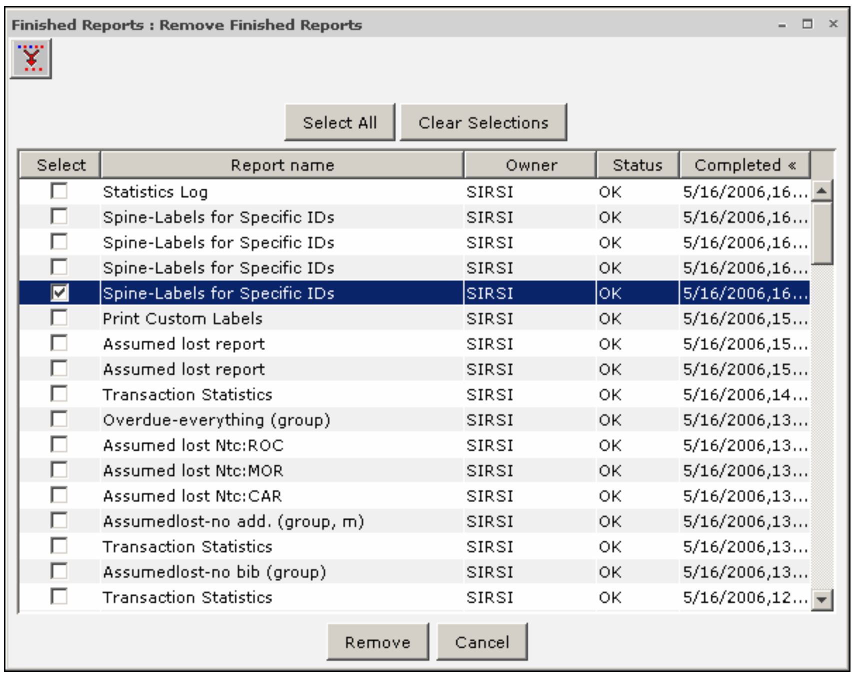
If the results of a finished report will be needed in the future, you can view the file, and then save it using your word processing program.

Remove a Report

CAUTION **Once you remove a report from the Finished List of Reports, you cannot retrieve it.**

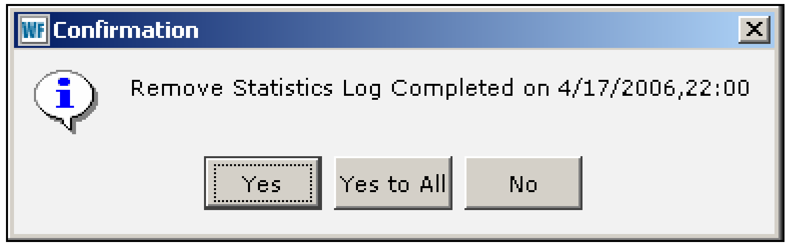
To remove a report that has been viewed and is no longer needed

1. Click the **Finished Reports** wizard. The Display Finished Reports window appears.



2. Select the report you want to remove and click **Remove**. The Remove Finished Reports window appears.
3. Select the check box of each report you want to remove.

4. Click **Remove**. The confirmation message appears.

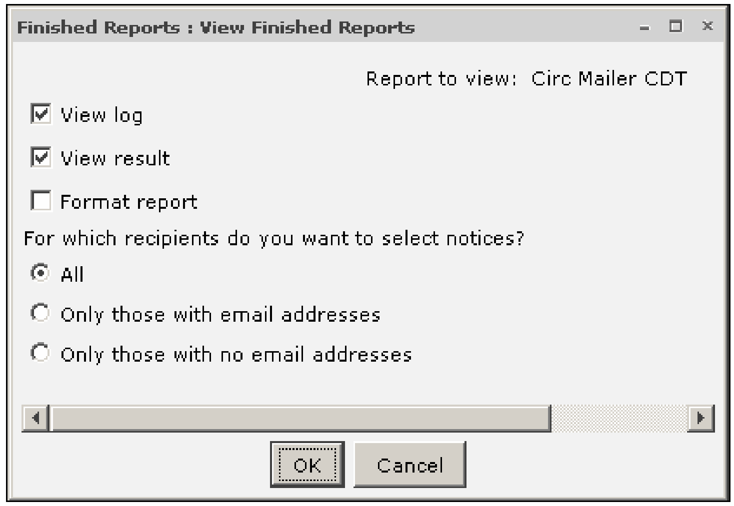


5. Click **Yes** to confirm the removal of the reports. Or, click **No** to cancel.

NOTE There is no confirmation message if you click **Remove All** to remove all of the selected reports.

Viewing Finished Reports

The View option displays a document with the specified log and result selections. You can edit or reformat the report text, as well as print or save it as an electronic file.



View Options

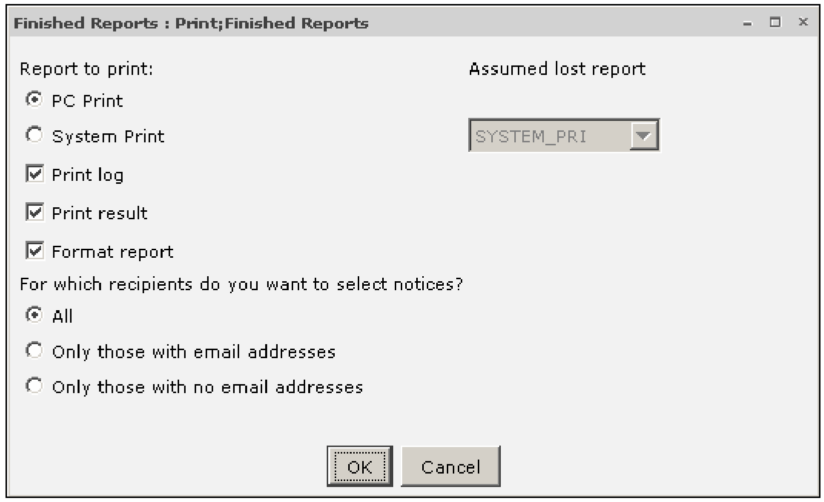
Option	Description
View Log	If the View Log option is selected, the results of the report will include the log. The log is a detailed description of the formatting options used and how the selection criteria affected the results. It provides information such as how many records were selected at each step in the selection process. Logs are helpful when first setting up a report, or comparing the results of slightly different reports.
View Result	If the View Result option is selected, the primary text of the report displays. Generally, you should always select this option.
Format Report	The Format Report option allows you to use the default formatting. If this option is selected, a report will reflect Symphony - defined formatting specific to each report, such as report headers, spacing, and page breaks. In some instances, it might be helpful to print an unformatted report to enhance readability or conserve paper.

Notes

- Count reports are wholly contained within the log, and an attempt to view these types of reports if the View log option is not selected will return an error message.
- The default word processing program is WordPad, but this is configurable using the Session Settings. You must exit the viewing application between reports or the most recently viewed report will not display.
- The default log and result settings carry over from selections made in the Session Settings.

Printing Finished Reports

The Print option allows you to print finished reports using a default Windows printer or Symphony system printer.



Print Options

Option	Description
PC Print	If you select this option and if the PC being used for reports has an attached printer or is set up to have a default network printer, the report will be sent automatically to the defined printer.
System Print	This option sends results directly to a Symphony system printer selected from the list.
Print Log	If you select this option, the printed report will include a log. The log is a detailed description of the formatting options used and how the selection criteria affected the results. It provides information such as how many records were selected at each step in the selection process. Logs are helpful when first setting up a report, or comparing the results of slightly different reports.

Print Result If you select this option, the printed report will include the primary text of the report. Generally, you should always select this option.

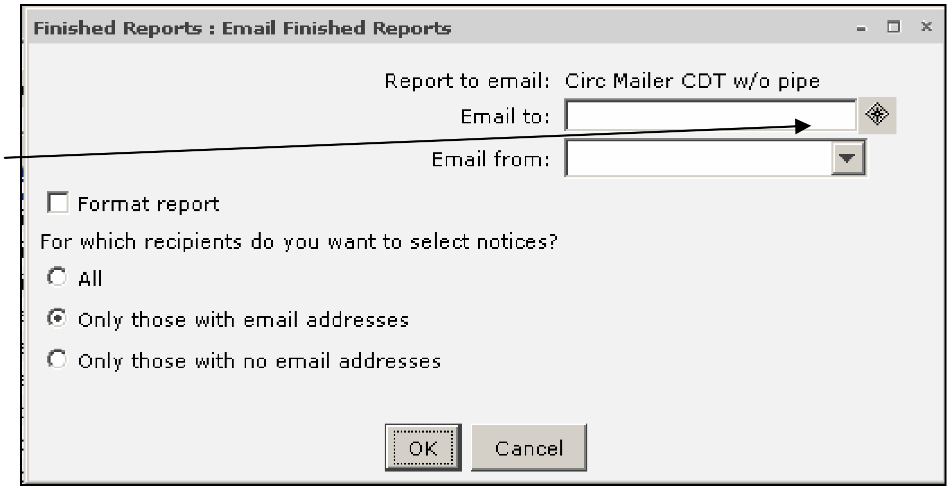
Format Report The Format Report option allows you to use the default formatting. If this option is selected, a printed report will reflect Symphony -defined formatting specific to each report, such as report headers, spacing, and page breaks. In some instances, it might be helpful to print an unformatted report to enhance readability or conserve paper.

NOTE For notice type reports, you must format the report to print the notice.

E-mailing Finished Reports

The Email option sends a finished report to selected e-mail addresses.

Email Addresses gadget



E-mail Options

Option	Description
Email To	If the system is configured for e-mail, this selection sends the report directly to an e-mail address or list of addresses. You can use the Email Addresses gadget to enter addresses.
Email From	If the system is configured for e-mail, this selection delivers the report directly from an e-mail address or list of addresses. You can use the drop-down list to select the e-mail address of person sending the e-mail.
Format Report	The Format Report option allows you to use the default formatting. If this option is selected, a printed report will reflect Symphony -defined formatting specific to each report, such as report headers, spacing, and page breaks. In some instances, it might be helpful to print an unformatted report to enhance readability or conserve paper.

NOTE If the report is a notice report and you selected to e-mail notices to users with e-mail addresses, the users entered in Email To field will receive the entire report, including all users' notices. Individual notices are automatically e-mailed based on the e-mail entry ID in the user address of the user record.

Report Samples and Guidelines

Overview

This chapter provides samples of several types of reports as well as a few of the frequently used gadgets.

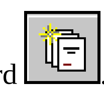
Count Reports

Many Symphony reports generate both a log and a result section in the output. Count reports only generate a log, which contains a number of whatever was counted based on the report. For example, the Count Item Titles reports the number of title records that match the report criteria.

Count Users Report

This report can provide a count of users who fall into a wide variety of categories. This is the report to select if you have an information need that begins in the following way: “I need to know how many users are currently in the database.”

Run the Count Users (Usercnt) report to count the number of juvenile user records.

1. Click the **Schedule New Reports** wizard . The Display Template Reports window appears.
2. Click the **User** tab.
3. In the **Report name** list, select the **Count Users** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to “Count of Juvenile Users.”
5. Click the **User Selection** tab.
6. Select the **Policy List** gadget for the **User Profile** field. The User Profile gadget window appears.
7. Verify that the **Contains Selected Policies** option is selected.
8. In the **List to Choose From**, select **JUVENILE**. Juvenile should display in the **List Selected**.
9. Click **OK** to return to the User Selection tab.

10. After you select your criteria:

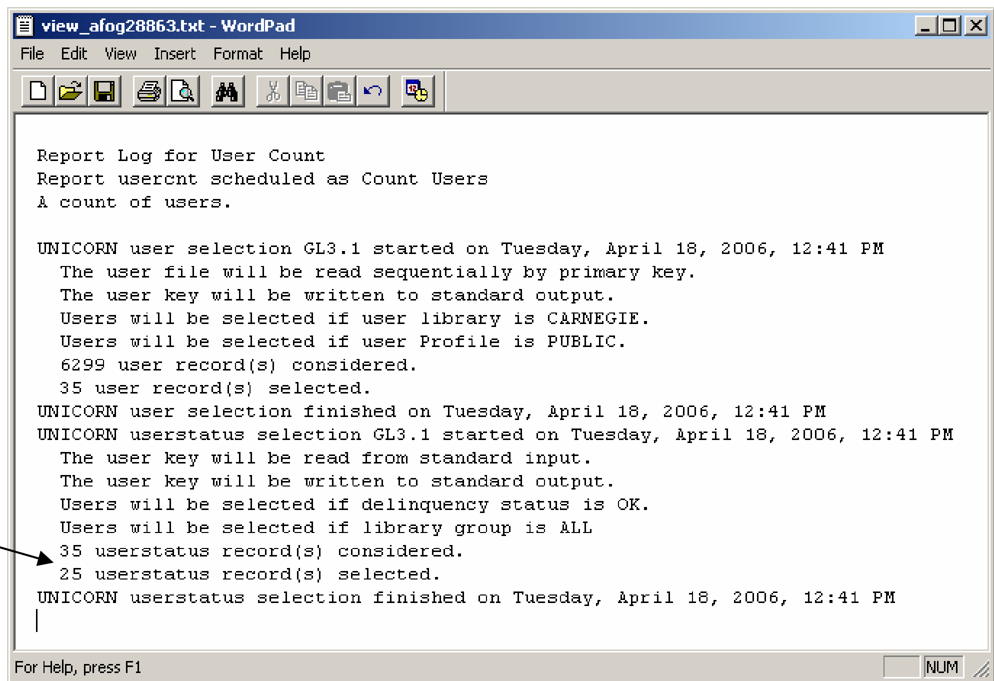
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

    -Or-

    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Count Users Report Log

The final count




```
Report Log for User Count
Report usercnt scheduled as Count Users
A count of users.

UNICORN user selection GL3.1 started on Tuesday, April 18, 2006, 12:41 PM
  The user file will be read sequentially by primary key.
  The user key will be written to standard output.
  Users will be selected if user library is CARNEGIE.
  Users will be selected if user Profile is PUBLIC.
  6299 user record(s) considered.
  35 user record(s) selected.
UNICORN user selection finished on Tuesday, April 18, 2006, 12:41 PM
UNICORN userstatus selection GL3.1 started on Tuesday, April 18, 2006, 12:41 PM
  The user key will be read from standard input.
  The user key will be written to standard output.
  Users will be selected if delinquency status is OK.
  Users will be selected if library group is ALL
  35 userstatus record(s) considered.
  25 userstatus record(s) selected.
UNICORN userstatus selection finished on Tuesday, April 18, 2006, 12:41 PM
```

Count Items Report

This report can provide a count of items that fall into a wide variety of categories. This is the report to select if you have an information need that begins in the following way: “I need to know how many items are currently in the database.”

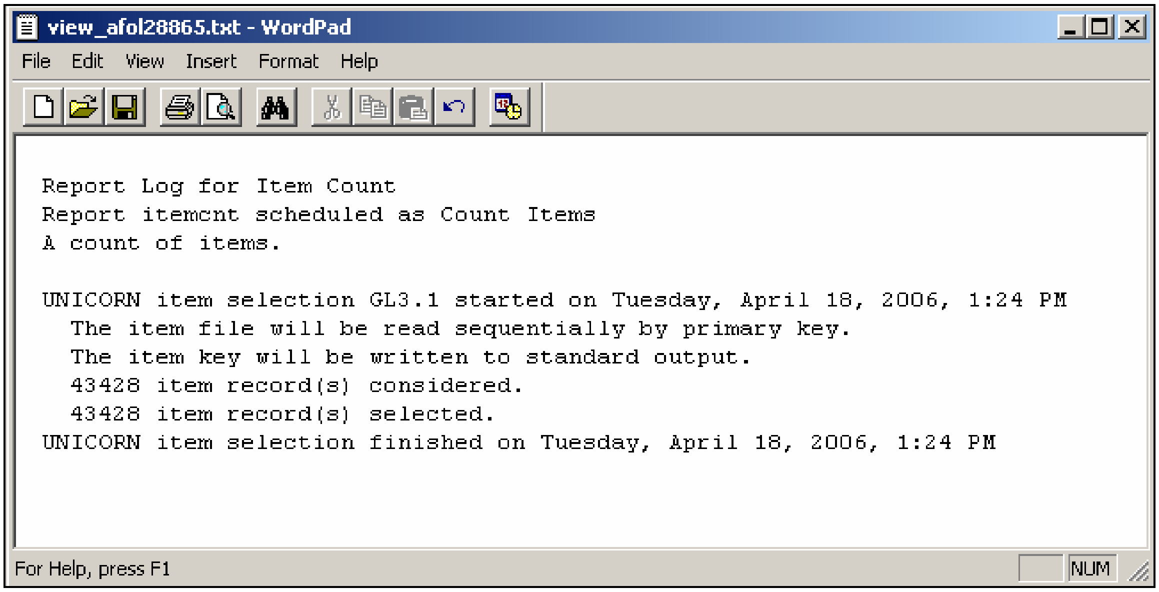
Run the Count Items (Itemcnt) report to count the number of item records added to the database last month.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Bibliographic** tab.
3. In the **Report name** list, select the **Count Items** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to “Items Added Last Month.”
5. Click the **Copy Selection** tab.
6. Select the **Date Range** gadget for the **Date Created** field. The Date Range gadget window appears.
7. Click **Range**.
8. Type or use the gadget to enter the beginning date in the **Use data for this period** box.
9. Type or use the gadget to enter the ending date in the **Thru** box.
10. Click **OK.**
11. After you select your criteria:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

      -Or-

    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Count Items Report Log



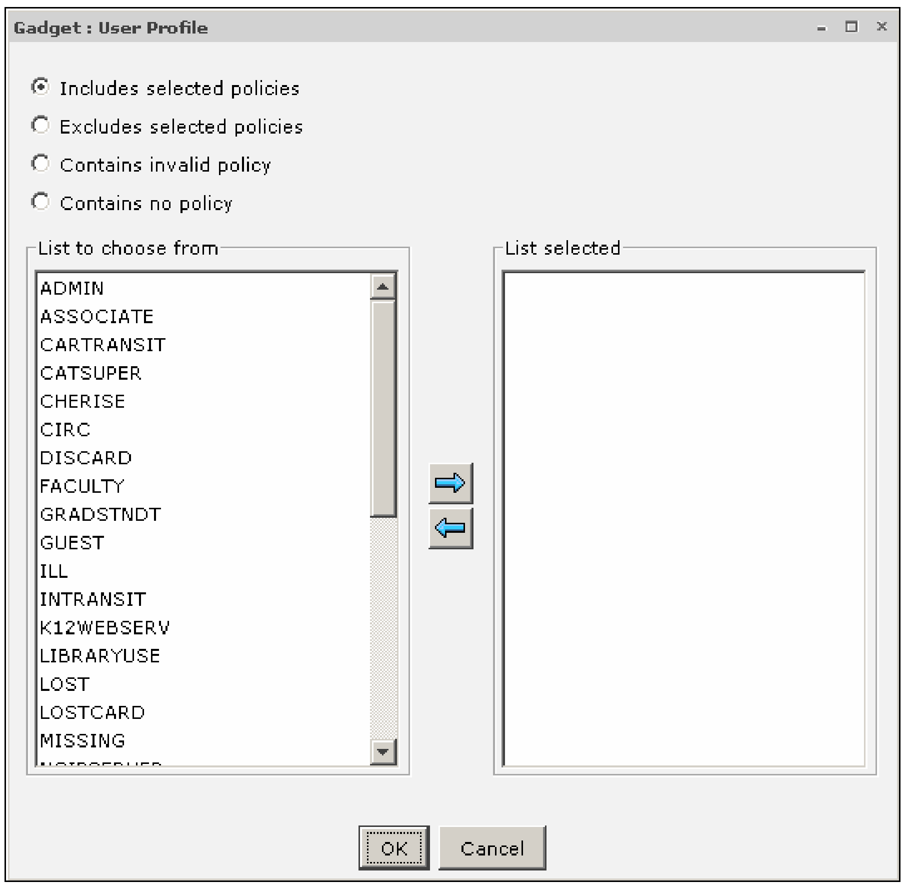
Policy List Gadget

The Policy List gadget selects a list of policies in alphabetical order, or other data to be included in the function. Depending on the function of the selected policies, the following options may be available.

Option	Description
Contain Selected Policies	This option is used to include one or more policies from a list. If nothing is selected, all policies are included. In the **List to Choose From** list, select the policies you want to include. These policies will be added to the **List Selected** by clicking the arrow in the center of the window.
Does Not Contain Selected Policies	This option is used to exclude one or more policies from a list. If nothing is selected, all policies are included. In the **List to Choose From** list, select the policies you want to exclude. These policies will be added to the **List Selected** by clicking the arrow in the center of the window.

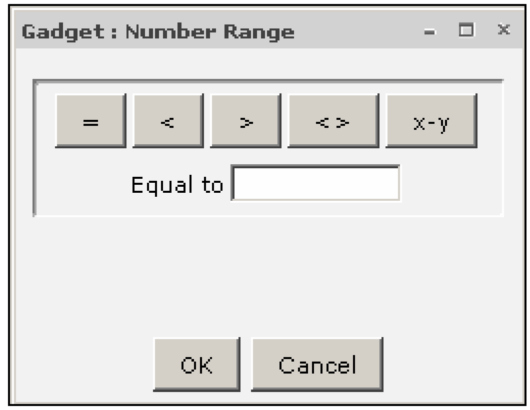
NOTE To remove a policy from the **List Selected**, select it and click the arrow pointing towards the List to Choose From list. The policy will be removed from the list.

Option	Description
Contains Invalid Policy	This option allows for the inclusion of records that contain invalid policy values.
Contains No Policy	This option allows for the inclusion of records that contain no policy values.



Number Range Gadget

The Number Range gadget selects a range of numbers by using the following mathematical operators. There may be times you want to refine a report by using a combination of number range gadgets in different fields.



Option	Description
= (Equal to)	Report results will be exactly the number specified in the field. You might select Equal to 0, if you want to select all that "have not yet been" subject to the activity stated in the field.
< (Less than)	Report results will be less than the number specified in the field. This would be a good selection if you wanted to eliminate "the most" report results.
> (Greater than)	Report results will be more than the number specified in the field. This would be a good selection if you wanted to focus on "the most" such as which users have the most charges, or the most bills, or which invoices have the most copies.
<> (Not equal to)	Report results will not include the number specified in the field. You might select Not Equal to 0, if you want to select only those that have been subject to the activity stated in the field.

x-y (Between _ and _)	Report results will include numbers falling between the numbers specified in the field. The numbers named in the range are not included in the results. (“Between 0 and 3” pulls up only results of “1” and “2.”)

Example – Count Items

If you want to see all items that have never been charged, the Number of total charges would be equal to zero.

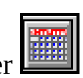
Example – Count Users

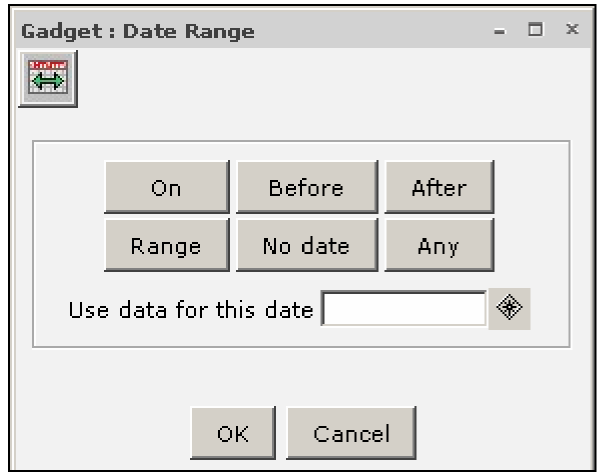
If you want to see all the users who have outstanding bills, whether partially paid or not paid, set the Number of bills to greater than zero.

Date Range Gadget

The Date Range gadget selects a date based on a fixed or sliding date range for the selection. The option that first displays is the fixed date. That is, the date or date range is based on a specific date. This option is used most often, particularly in reports that are scheduled ASAP.

Specific Date Helper

The Specific Date helper  is used to select a fixed date. The following fixed date options are provided. In the On, Before, After, and Range options, you can use the Calendar gadget to select a date.



Option	Description
On	The data being selected will have been stamped for the specified day.
Before	The data being selected will have been stamped for any date before and including the specified date, including NEVER.
After	The data being selected will have been stamped for any date later than and including the specified date.
Range	The data being selected will fall between and include the two specified dates.
No Date	The data being selected will have NEVER in the date field. These records have never had a date specified in the field. This is not a useful selection for fields such as Date Created, because this is a date supplied by the system for all existing records with a date created field.
Any	Data will not be selected based on a date or lack thereof. All dates will be included. This is also the default if no date selections are made.

List Reports

Symphony List reports generate both a log and result section. The log contains the number of what is listed in the result. The result contains the list of items, users, bills, etc. For example, the List Titles report will list titles that match the report criteria.

List Items Report

The List Items (Itemlist) report provides a list of items. Results can be sorted by title/author, call number, or flexible ID, also referred to as the title key or control number. Use the options on the Print Item tab to design your lists.

Set up the List Items report to select the number of copies added last month and output the list.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Bibliographic** tab.
3. In the **Report name** list, select the **List Items** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to “Copies Added Last Month.”
5. Click the **Item Selection** tab.
6. Select the **Date Range** gadget for the **Date Created** field. The Date Range gadget window appears.
7. Click **Range**.
8. Type or use the gadget to enter the beginning date in the **Use data for this period** box.
9. Type or use the gadget to enter the ending date in the **Thru** box.
10. Click **OK**.
11. Click the **Sorting** tab.
12. In the **Sorted By** list, select the sort option you want.
13. Click the **Print Item** tab to configure the output of the list.

    Click the **Help** wizard on the toolbar for information on output options. The List Items Report online help topic appears. In the help topic, click **Print Item**.

14. After you select your output options:

    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

    -Or-

    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

List Item Report Log

view_afui44669.txt - WordPad

File Edit View Insert Format Help

```
Report Log for Item List
Report itemlist scheduled as Copies Added Last Month
A shelflist form printout of items.

UNICORN item selection GL3.1 started on Wednesday, May 17, 2006, 1:39 PM
  The item file will be read sequentially by primary key.
  The item key will be written to standard output.
  Items will be selected if the date created is later than 3/31/2006 and
earlier than 5/1/2006.
  13432 item record(s) considered.
  0 item record(s) selected.
UNICORN item selection finished on Wednesday, May 17, 2006, 1:39 PM
UNICORN catalog selection GL3.1 started on Wednesday, May 17, 2006, 1:39 PM
  The catalog key will be read from standard input.
  The catalog key will be written to standard output.
  The string from standard input will be written to standard output.
  The author key will be written to standard output.
  The title key will be written to standard output.
  0 catalog record(s) considered.
  0 catalog record(s) selected.
UNICORN catalog selection finished on Wednesday, May 17, 2006, 1:39 PM
Sort: sorting by TITLE, AUTHOR
UNICORN item printing GL3.1 started on Wednesday, May 17, 2006, 1:39 PM
  The item key will be read from standard input.
  The output will be a record by record list.
  The brief information will be written to standard output.
    Entry IDs:FULL
  Descriptive labels will precede catalog data.
  Subfield codes will not appear in output.
  The item information will be written to standard output.
  The report title option will be used.
  0 catalog record(s) printed.
  0 catacnt record(s) printed.
  0 call number record(s) printed.
  0 item record(s) printed.
  0 itemacnt record(s) printed.
UNICORN item printing finished on Wednesday, May 17, 2006, 1:39 PM
```

For Help, press F1 NUM

List Users Report

The List Users (Userlist) report can produce a wide variety of user information, with a wide variety of output options. The report prints only general information by default, which includes the user's title, user name, user ID, alt ID (if present), and library. This is the report to select if you have an information need that begins in one of the following ways.

- "I need to know which users…"
- "I need a list of users who…"
- "I need this information about these users…"

Set up the List Users report to select public users and output the list.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **User** tab.
3. In the **Report name** list, select the **List Users** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to "List of Public Users."
5. Click the **User Selection** tab.
6. Select the **Policy List** gadget for the **User Profile** field. The User Profile gadget window appears.
7. Verify that the **Contains Selected Policies** option is selected.
8. In the **List to Choose From**, select **PUBLIC**. Public should display in the **List Selected**.
9. Click **OK**.
10. Click the **Sorting** tab.
11. In the **Sorted By** list, select the sort option you want.
12. Click the **Print User** tab to configure the output of the list.

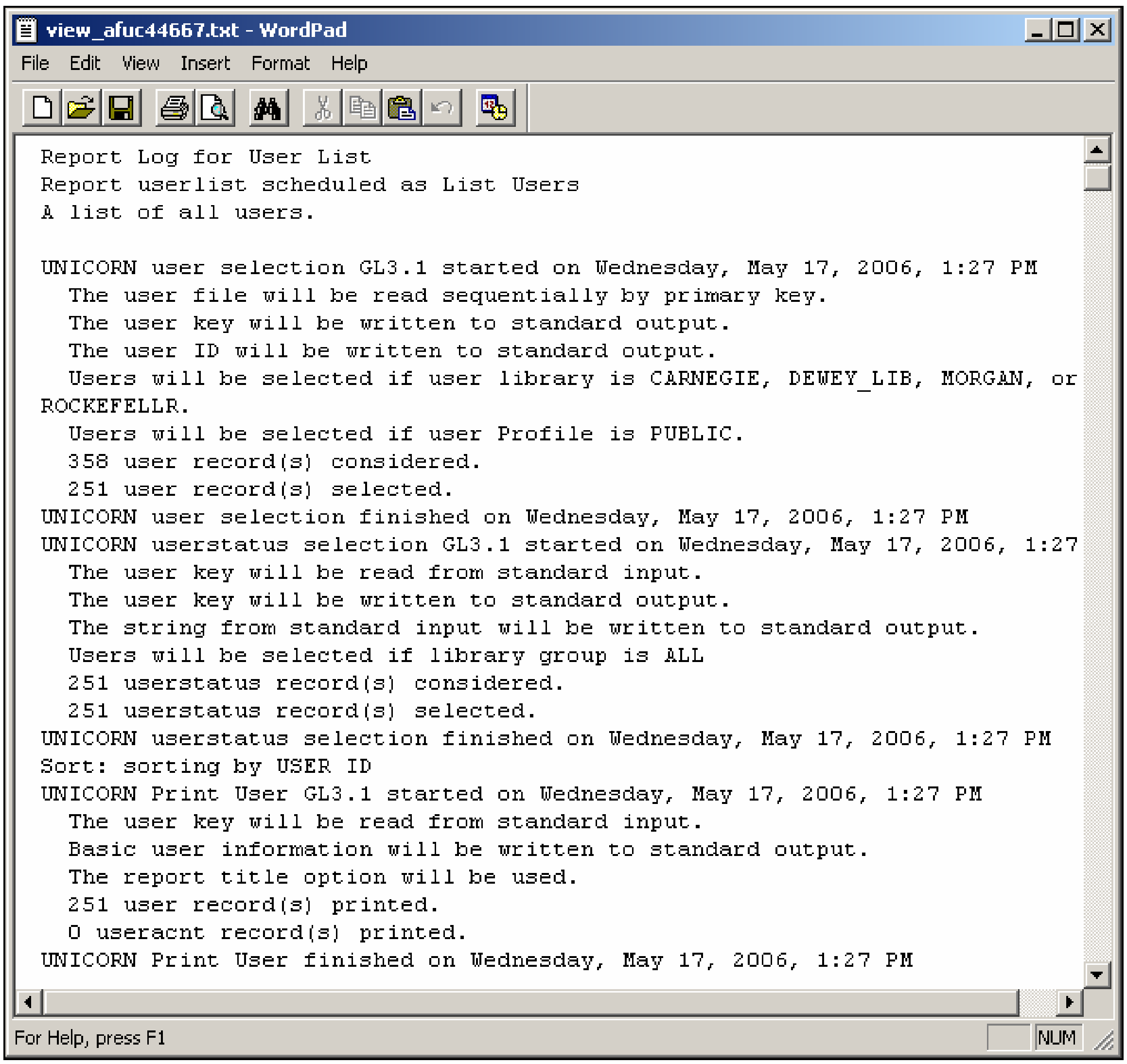
13. After you select your output options:

    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

      -Or-

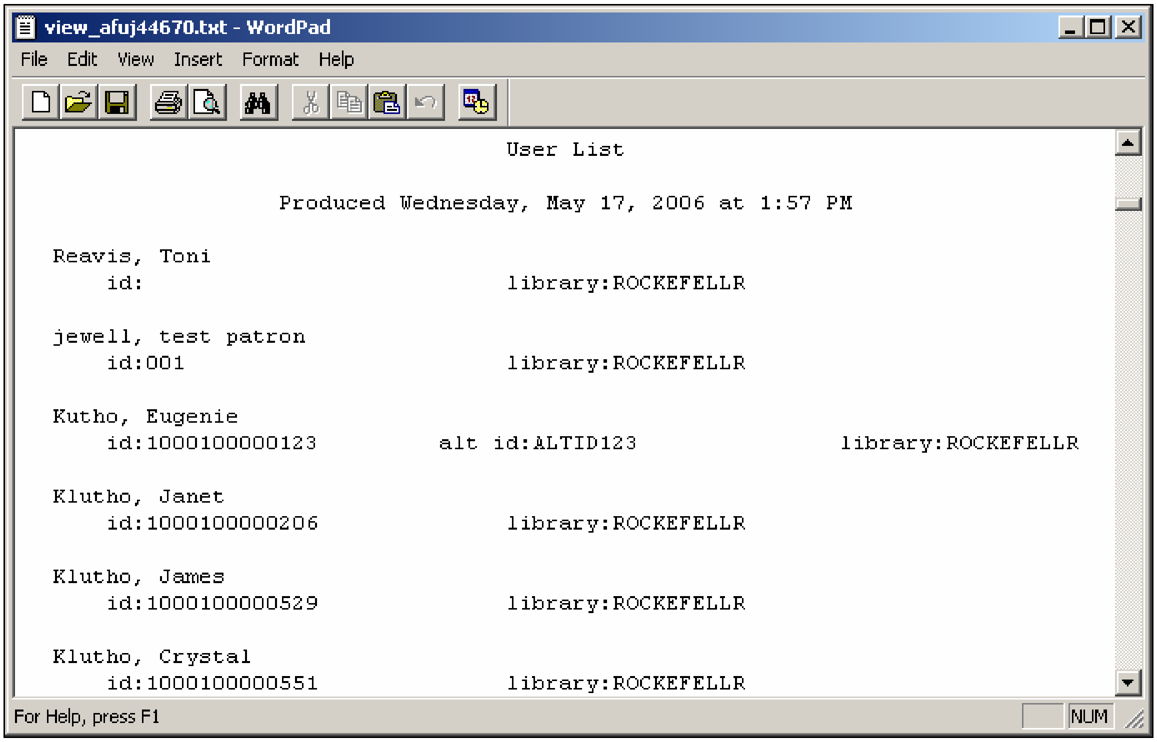
    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

List User Report Log




```
Report Log for User List
Report userlist scheduled as List Users
A list of all users.

UNICORN user selection GL3.1 started on Wednesday, May 17, 2006, 1:27 PM
  The user file will be read sequentially by primary key.
  The user key will be written to standard output.
  The user ID will be written to standard output.
  Users will be selected if user library is CARNEGIE, DEWEY_LIB, MORGAN, or
ROCKEFELLR.
  Users will be selected if user Profile is PUBLIC.
  358 user record(s) considered.
  251 user record(s) selected.
UNICORN user selection finished on Wednesday, May 17, 2006, 1:27 PM
UNICORN userstatus selection GL3.1 started on Wednesday, May 17, 2006, 1:27
  The user key will be read from standard input.
  The user key will be written to standard output.
  The string from standard input will be written to standard output.
  Users will be selected if library group is ALL
  251 userstatus record(s) considered.
  251 userstatus record(s) selected.
UNICORN userstatus selection finished on Wednesday, May 17, 2006, 1:27 PM
Sort: sorting by USER ID
UNICORN Print User GL3.1 started on Wednesday, May 17, 2006, 1:27 PM
  The user key will be read from standard input.
  Basic user information will be written to standard output.
  The report title option will be used.
  251 user record(s) printed.
  0 useracnt record(s) printed.
UNICORN Print User finished on Wednesday, May 17, 2006, 1:27 PM
```

List User Report




```
                                User List

                Produced Wednesday, May 17, 2006 at 1:57 PM

  Reavis, Toni
      id:                           library:ROCKEFELLR

  jewell, test patron
      id:001                        library:ROCKEFELLR

  Kutho, Eugenie
      id:1000100000123         alt id:ALTID123              library:ROCKEFELLR

  Klutho, Janet
      id:1000100000206              library:ROCKEFELLR

  Klutho, James
      id:1000100000529              library:ROCKEFELLR

  Klutho, Crystal
      id:1000100000551              library:ROCKEFELLR
```

List Bibliography Report

The List Bibliography (Bibliography) report creates customized bibliographies by catalog, call number, or item characteristics, and/or by structuring a catalog search using Symphony's standard Boolean operators and qualifiers.

Set up the List Bibliography report to select the number of title records that reference animals, excluding cats.

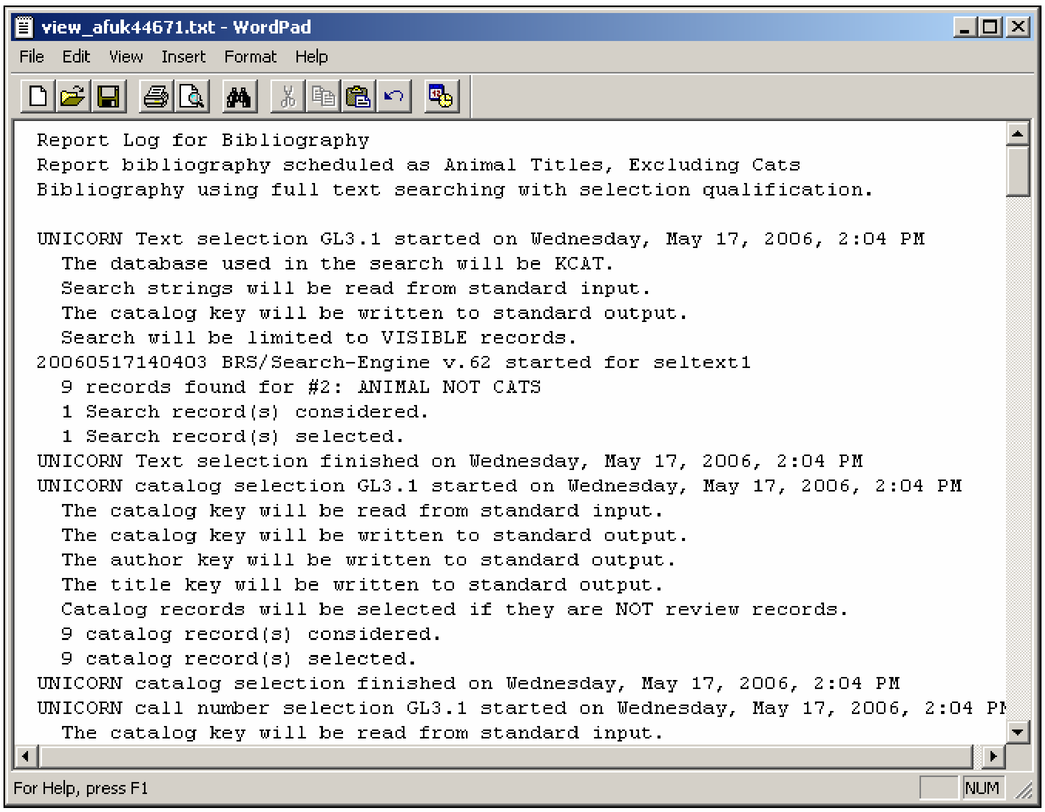
1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Bibliographic** tab.
3. In the **Report name** list, select the **List Bibliography** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to "Animal Titles, Excluding Cats."
5. Click the **Search String** tab.
6. Type **"animals not cats"** in the **Search String** box.
7. Click the **Sorting** tab.
8. In the **Sorted By** list, select the sort option you want.
9. Click the **Print Item** tab to configure the output of the list.
10. After you select your output options:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

      -Or-

    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

NOTE If working with a report that selects specific items, such as List Items with Bills, the Call Number and Record by Record options display only the call numbers and copies that meet the selection criteria such as bills. A Catalog option prints all items for the title, even if only a single copy has an associated bill.

List Bibliography Report Log



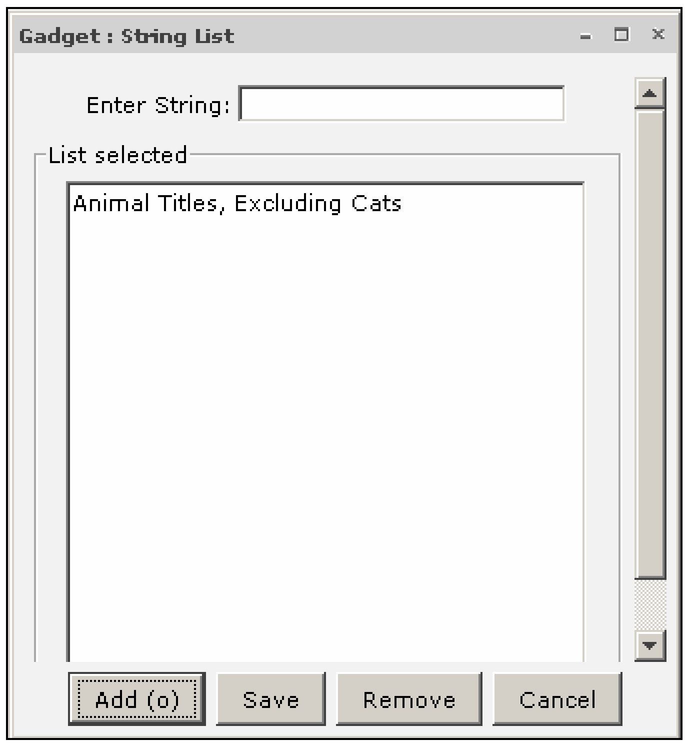

```
Report Log for Bibliography
Report bibliography scheduled as Animal Titles, Excluding Cats
Bibliography using full text searching with selection qualification.

UNICORN Text selection GL3.1 started on Wednesday, May 17, 2006, 2:04 PM
  The database used in the search will be KCAT.
  Search strings will be read from standard input.
  The catalog key will be written to standard output.
  Search will be limited to VISIBLE records.
20060517140403 BRS/Search-Engine v.62 started for seltext1
  9 records found for #2: ANIMAL NOT CATS
  1 Search record(s) considered.
  1 Search record(s) selected.
UNICORN Text selection finished on Wednesday, May 17, 2006, 2:04 PM
UNICORN catalog selection GL3.1 started on Wednesday, May 17, 2006, 2:04 PM
  The catalog key will be read from standard input.
  The catalog key will be written to standard output.
  The author key will be written to standard output.
  The title key will be written to standard output.
  Catalog records will be selected if they are NOT review records.
  9 catalog record(s) considered.
  9 catalog record(s) selected.
UNICORN catalog selection finished on Wednesday, May 17, 2006, 2:04 PM
UNICORN call number selection GL3.1 started on Wednesday, May 17, 2006, 2:04 PM
  The catalog key will be read from standard input.
```

String List Gadget

The String List gadget selects specified text, exactly as it appears in the system.

You can select or exclude a specified string of text, or a list of text strings. If you select a list, remember that each record must include or exclude only one of the text strings, not all of them, so for Department in the User Selection select either English OR Spanish, not both English AND Spanish.

Each string list gadget accepts only the number of characters that is valid for the particular selection field. Continue to add text strings until the list is complete. Select any line in the list to update or remove its entries.



For example, in the Title field under User Selection, you may want to select all users who are addressed as doctors, you would need to include dr, dr., Dr, Dr., DR, DR. For this selection option to be effective, your library must establish and follow standards for consistency in data entry. These fields are free text and are not verified by the system. This field is also case and punctuation sensitive, so if standards were not followed, it would be necessary to include all possible combinations.

See the Search Strategies topic in the WorkFlows Online Help to learn more.

Notice Reports

Notice reports answer the question, "Who needs what information sent to them?" It selects the users or vendors to receive the notice and the notice text, and can be e-mailed directly to users and/or have address labels printed.

Overdue Notices

Run the Overdue Notices (Overdue) report if you want to send overdue notices for all overdue items, regardless of when they became overdue. Results can be sorted by user ID, group ID, user name, or zip code. User ID is the default sort. Address labels may also be printed.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Circulation** tab.
3. In the **Report name** list, select the **Overdue Notice** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to "Overdue Notice."
5. Enter your selection criteria on the various tabs to limit the report results. Use the Print Separate Reports for Each Library tab to organize and print the data by library.
6. Click the **Sorting** tab.
7. In the **Sorted By** list, select the sort option you want.
8. Click the **Charge Notice** tab.
9. Select the **Count as a notice sent** option.

10. After you select your output options:

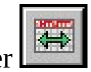
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

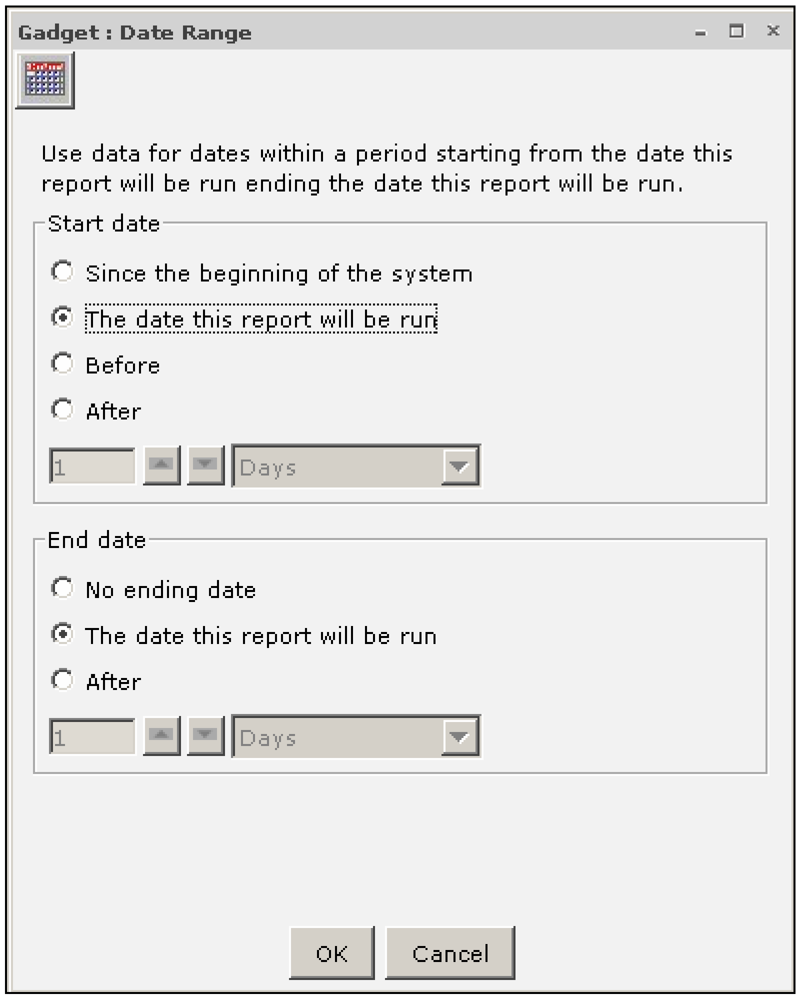
      -Or-

    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Date Range Gadget

Date Depends on the Report Run Date Helper

The Date Depends on the Report Date helper  is used to select a sliding date. The sliding date depends on the report run date. It is most useful for reports that are scheduled to run at specified intervals. It allows the report to select a date range based on the date that the report runs, so a scheduled report may run monthly, pulling data for the previous month's activity, without ever having to make changes to the report's selection criteria. The following sliding date options are provided.

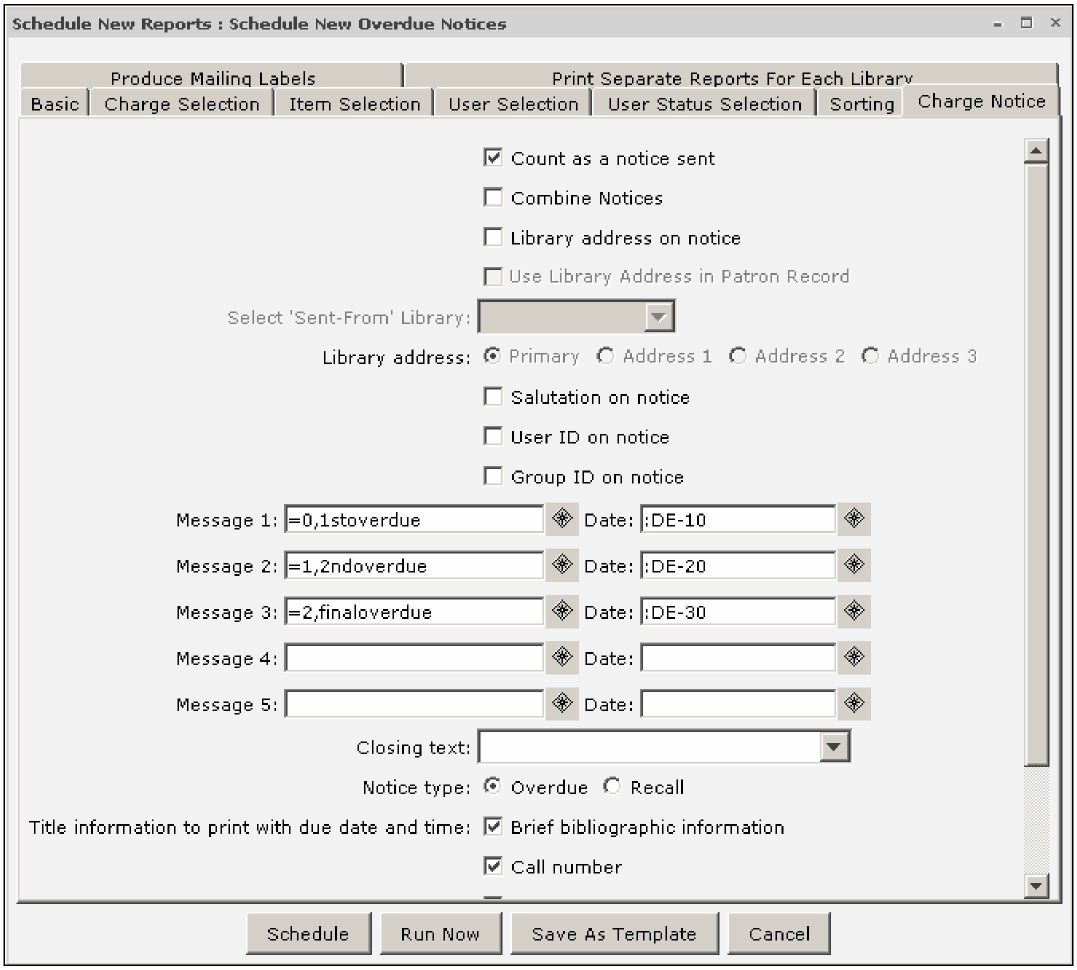


Option	Description
Before	The data being selected will have been stamped for a start date prior to, but not including, the report run date.
After	The data being selected will have been stamped for a start date later than but not including the report run date. Select a period of days, weeks, or months. Select the starting date by indicating how many of the selected periods prior to running the report to include in your results. Use the + and - buttons to select a number, or simply type a number into the field. If you are selecting dates before the report run date, you also have the option to select all of the specified data since the beginning of the system. In a report scheduled periodically, this option incorporates any new data since the last report was run with all existing data. You must also specify the ending date of the range by selecting the Next button. The default end date is one day after the report run date. This ensures that data for the day of the report is included in the report results. No ending date indicates that all dates that occur in the future, later than the report run date, will be included. Select the ending date by indicating how many periods after running the report to include in your results. Use the plus and minus buttons to select a number, or type a number into the field.

New Overdue Notices

Run the New Overdue Notices (Noverdue) report if you want to send daily overdue notices, notices for very recently overdue items, or items that became overdue during any specified date range. The report differs from other overdue notice reports because of this date range selection in the Charge Notice. If you use the default date selection, you must run this report on a daily basis, including weekends. The default date is no later than zero days before the report is run, or more simply, today. Results can be sorted by user ID, group ID, user name, or zip code. User ID is the default sort. Address labels may also be printed.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Circulation** tab.
3. In the **Report name** list, select the **New Overdue Notices** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to “Daily Overdue Notices.”
5. Click the **Charge Notice** tab.
6. Select the **Count as a notice sent** option.
7. Using the Date Range gadget, enter a date range in for the **Date**. Select **Since the beginning of the system** for the Start Date. Select **Before** and enter the number of days before the report is to run for the End Date. Repeat for the remaining two messages.



In this example, if a patron has received no notices and their items became overdue sometime between the beginning of the system and 10 days prior to the report being run, they will receive a first overdue notice. If a patron has received one notice and their items became overdue sometime between the beginning of the system and 20 days prior to the report being run, they will receive a second overdue notice.

8. Enter additional selection criteria on the various tabs to limit the results. Use the Print Separate Reports for Each Library tab to organize and print the data by library.
9. Click the **Sorting** tab.
10. In the **Sorted By** list, select the sort option you want.

11. After you select your output options:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

      -Or-

    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Circulation Mailer

Use the Circulation Mailer (Mlrcirc) report to send overdue, bill, and hold pickup notices, or any combination of the three (based on report selections). Overdue items, items held for pickup, or bills display in a compact, single-line list so that many items can be printed on a single mailer form. By default, only ACTIVE holds are selected.

In a circulation mailer form, notice text may be printed inside one or more layers of a form with internal carbons. The user’s and the library’s addresses display on the first visible layer of the notice form. When the user opens the next layer, optional notice text, a key to abbreviations, and a list of associated items displays. Use the Test Print of Notice Mailer report to verify mailer form alignment prior to printing this report.

This report was designed to print on a particular commercial mailer, and SirsiDynix will not guarantee that it will print on any other.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Circulation** tab.
3. In the **Report name** list, select the **Circulation Mailer** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, add today’s date to the name “Circulation Mailer.”
5. Enter the selection criteria on the various tabs. Use the Print Separate Reports for Each Library tab to organize and print the data by library.
6. Click the **Sorting** tab.
7. In the **Sorted By** list, select the sort option you want.
8. Click the **Circulation Mailer** tab.
9. Select the **Count as a notice sent** option.
10. After you select your output options:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

-Or-

- If the report is to run only once, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Order Information — Creative Data Products

Two-part mailer
57033 0250LIB001
US PATENT DES 382298

Reorder from Creative DataProducts

1-800-951-7234

Notes

- If you are using Windows 2000, you cannot use the Plain Mailer 4 1/2 x 8 mailer style.
- When the library address is included in a notice, the address is drawn from the user record with a user ID that matches the User ID attribute of the appropriate Library policy.

Statistics Reports

Item Statistics Report

The Item Statistics (Itemstat) report selects information about items currently part of the item database and presents information in a tabular format. By default, each item type is totaled for the selected records. If an output option other than “total” is selected for the column or row, the totals will still be included for each.

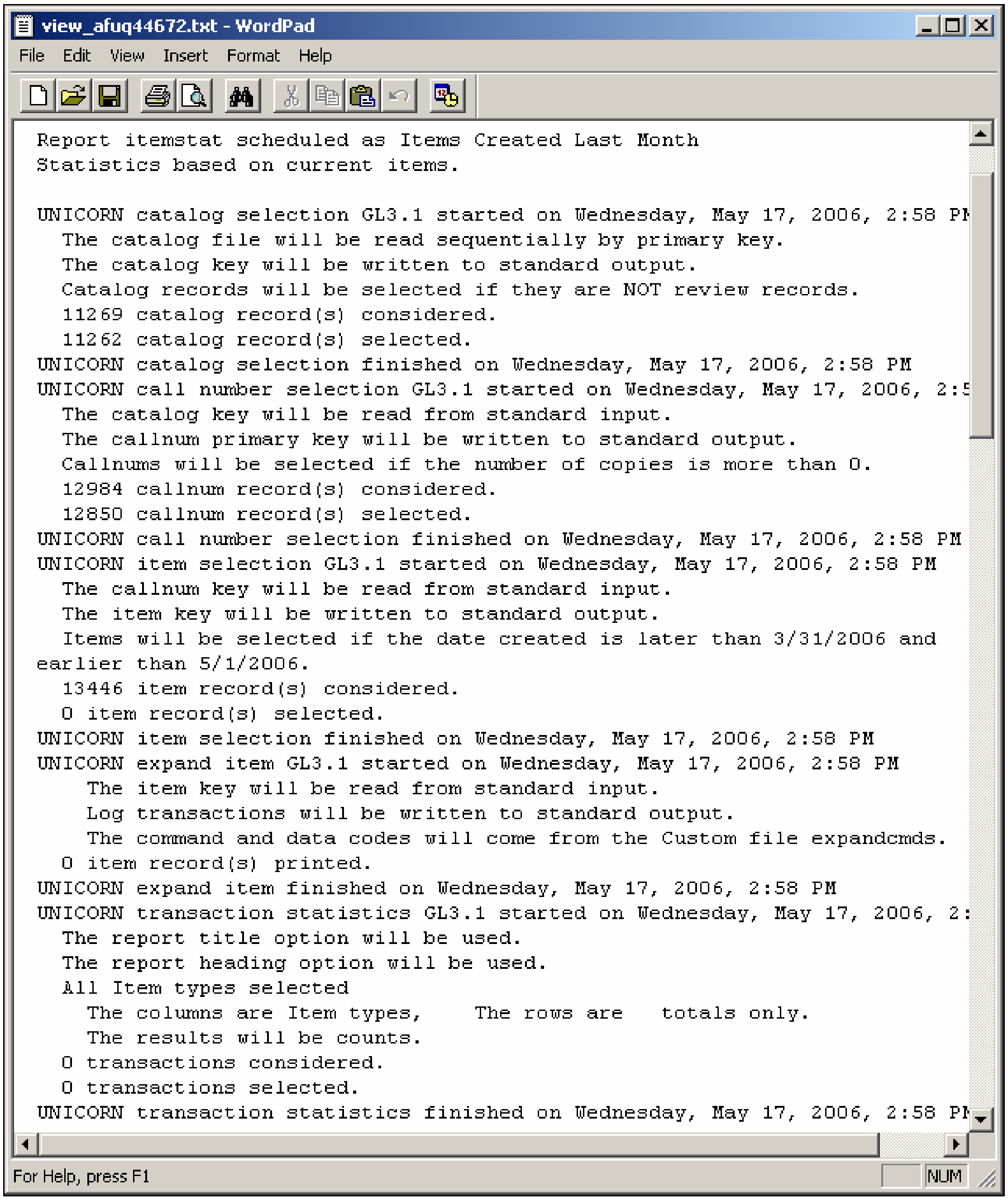
1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Bibliographic** tab.
3. In the **Report name** list, select the **Item Statistics** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to “Items Created Last Month.”
5. Click the **Item Selection** tab.
6. Select the **Date Range** gadget for the **Date Created** field. The Date Range gadget window appears.
7. Click **Range**.

9. Type or use the gadget to enter the beginning date in the **Use data for this period** box.
10. Type or use the gadget to enter the ending date in the **Thru** box.
11. Click **OK**.
12. Use the Print Separate Reports for Each Library tab to organize and print the data by library.
13. Click the **Transaction Statistics** tab.
14. Select **Item Type** in the Column drop-down list.
15. Select **Total** in the Row drop-down list.
16. After you select your output options:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

-Or-

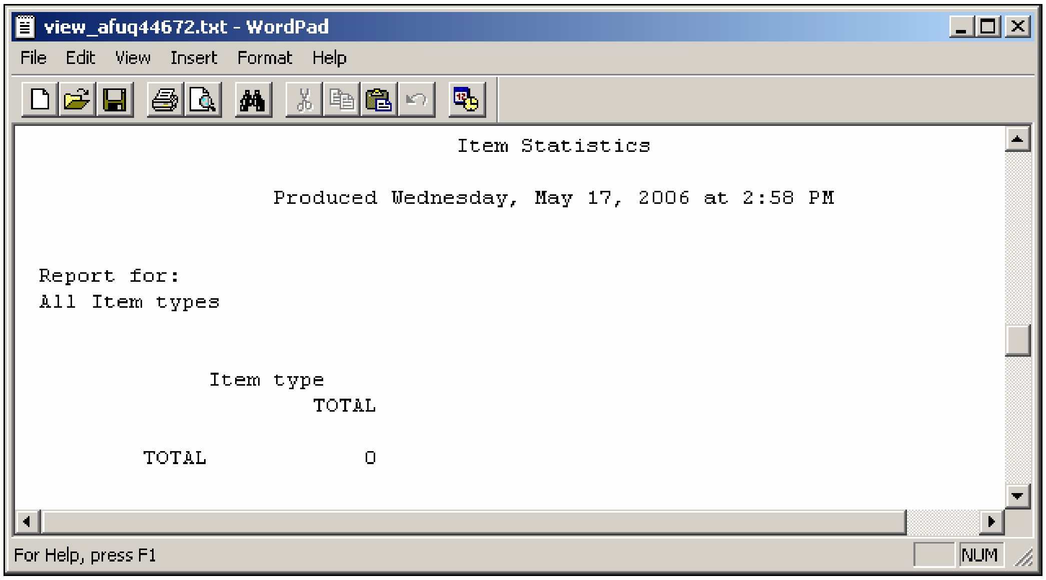
- If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Item Statistics Report Log




```
Report itemstat scheduled as Items Created Last Month
Statistics based on current items.

UNICORN catalog selection GL3.1 started on Wednesday, May 17, 2006, 2:58 P
  The catalog file will be read sequentially by primary key.
  The catalog key will be written to standard output.
  Catalog records will be selected if they are NOT review records.
  11269 catalog record(s) considered.
  11262 catalog record(s) selected.
UNICORN catalog selection finished on Wednesday, May 17, 2006, 2:58 PM
UNICORN call number selection GL3.1 started on Wednesday, May 17, 2006, 2:5
  The catalog key will be read from standard input.
  The callnum primary key will be written to standard output.
  Callnums will be selected if the number of copies is more than 0.
  12984 callnum record(s) considered.
  12850 callnum record(s) selected.
UNICORN call number selection finished on Wednesday, May 17, 2006, 2:58 PM
UNICORN item selection GL3.1 started on Wednesday, May 17, 2006, 2:58 PM
  The callnum key will be read from standard input.
  The item key will be written to standard output.
  Items will be selected if the date created is later than 3/31/2006 and
earlier than 5/1/2006.
  13446 item record(s) considered.
  0 item record(s) selected.
UNICORN item selection finished on Wednesday, May 17, 2006, 2:58 PM
UNICORN expand item GL3.1 started on Wednesday, May 17, 2006, 2:58 PM
    The item key will be read from standard input.
    Log transactions will be written to standard output.
    The command and data codes will come from the Custom file expandcmds.
  0 item record(s) printed.
UNICORN expand item finished on Wednesday, May 17, 2006, 2:58 PM
UNICORN transaction statistics GL3.1 started on Wednesday, May 17, 2006, 2:
  The report title option will be used.
  The report heading option will be used.
  All Item types selected
    The columns are Item types,    The rows are   totals only.
    The results will be counts.
  0 transactions considered.
  0 transactions selected.
UNICORN transaction statistics finished on Wednesday, May 17, 2006, 2:58 P
```

Item Statistics Report




```
                         Item Statistics

              Produced Wednesday, May 17, 2006 at 2:58 PM


 Report for:
 All Item types


              Item type
                      TOTAL

         TOTAL             0
```

Current Users Statistics Report

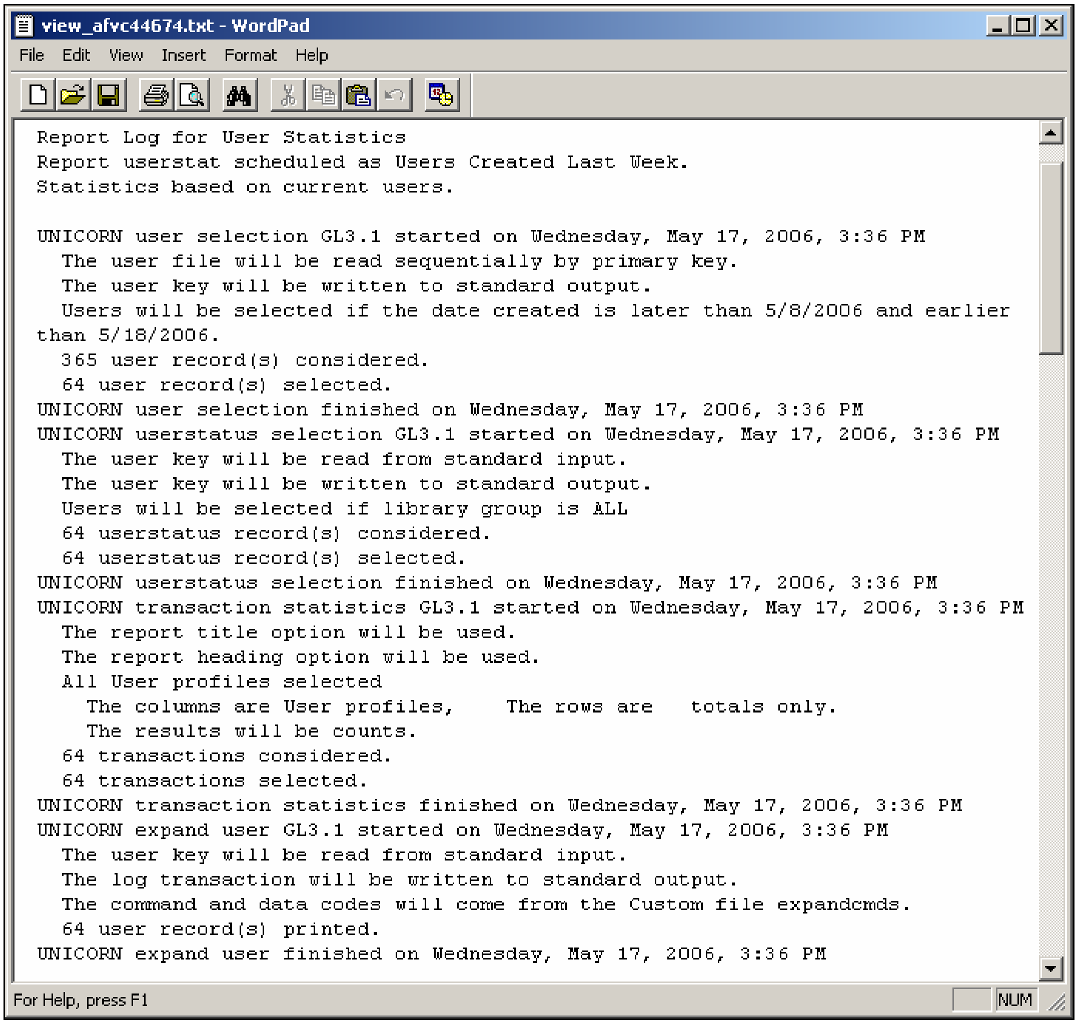
The Current Users Statistics (Userstat) report provides a wide range of information on all users currently in the user database. Use Selection Criteria options to limit the user records output. Use Print Item to format the results to select the column/row output. The default format of the report is a total of users in each profile.

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **User** tab.
3. In the **Report name** list, select the **Current Users Statistics** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to "Users Created Last Week."
5. Click the **User Selection** tab.
6. Select the **Date Range** gadget for the **Date Created** field. The Date Range gadget window appears.
7. Click **Range**.
8. Type or use the gadget to enter the beginning date in the **Use data for this period** box.
9. Type or use the gadget to enter the ending date in the **Thru** box.
10. Click **OK**.
11. Use the Print Separate Reports for Each Library tab to organize and print the data by library.
12. Click the **Transaction Statistics** tab.
13. Select **User Profile** in the Column drop-down list.
14. Select **Total** in the Row drop-down list.
15. After you select your output options:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

-Or-

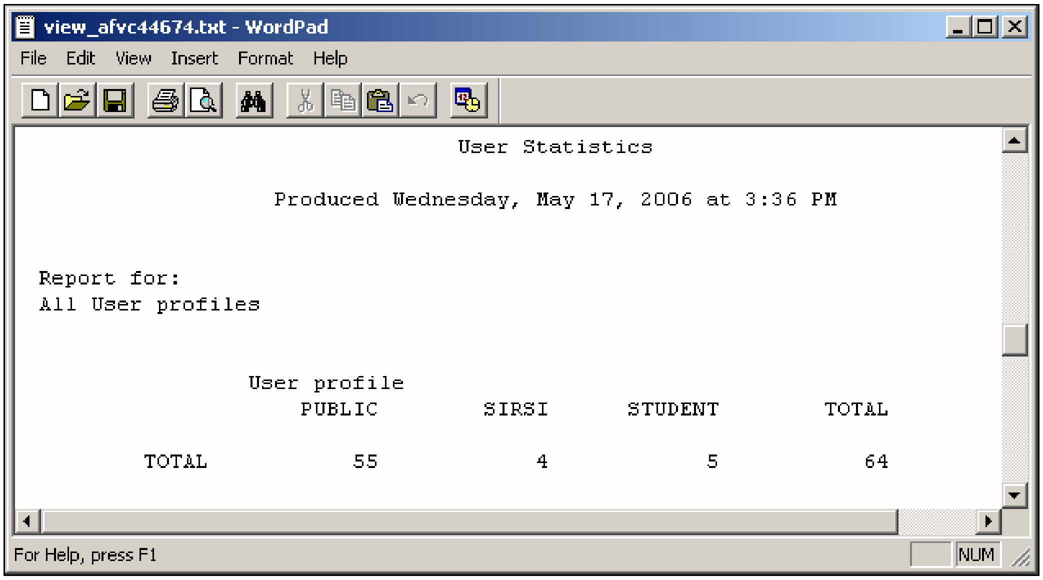
- If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Current Users Statistics Report Log




```
Report Log for User Statistics
Report userstat scheduled as Users Created Last Week.
Statistics based on current users.

UNICORN user selection GL3.1 started on Wednesday, May 17, 2006, 3:36 PM
  The user file will be read sequentially by primary key.
  The user key will be written to standard output.
  Users will be selected if the date created is later than 5/8/2006 and earlier
than 5/18/2006.
  365 user record(s) considered.
  64 user record(s) selected.
UNICORN user selection finished on Wednesday, May 17, 2006, 3:36 PM
UNICORN userstatus selection GL3.1 started on Wednesday, May 17, 2006, 3:36 PM
  The user key will be read from standard input.
  The user key will be written to standard output.
  Users will be selected if library group is ALL
  64 userstatus record(s) considered.
  64 userstatus record(s) selected.
UNICORN userstatus selection finished on Wednesday, May 17, 2006, 3:36 PM
UNICORN transaction statistics GL3.1 started on Wednesday, May 17, 2006, 3:36 PM
  The report title option will be used.
  The report heading option will be used.
  All User profiles selected
    The columns are User profiles,    The rows are   totals only.
    The results will be counts.
  64 transactions considered.
  64 transactions selected.
UNICORN transaction statistics finished on Wednesday, May 17, 2006, 3:36 PM
UNICORN expand user GL3.1 started on Wednesday, May 17, 2006, 3:36 PM
  The user key will be read from standard input.
  The log transaction will be written to standard output.
  The command and data codes will come from the Custom file expandcmds.
  64 user record(s) printed.
UNICORN expand user finished on Wednesday, May 17, 2006, 3:36 PM
```

Current Users Statistics Report




```
                         User Statistics

            Produced Wednesday, May 17, 2006 at 3:36 PM


Report for:
All User profiles


              User profile
                 PUBLIC       SIRSI     STUDENT      TOTAL

       TOTAL         55           4           5         64
```

Transaction Statistics Report

The Transaction Statistics (Statistics) report selects statistical and demographic information about item and user transactions. Information is presented in a tabular format. The most popular use for this report is to report the number of items circulated within a period.

Many Symphony users like to set up a Transaction Statistics report, which runs the first of every month, after the regular maintenance reports that cover the previous month's transactions. For example, the report is run May 1 for April 1- 30 transactions. To gather statistics for the previous month, the transaction date range should be set up to start one month before the report run date and end one month before the report run date. This will include transactions for the entire month previous to the month of the report run date.

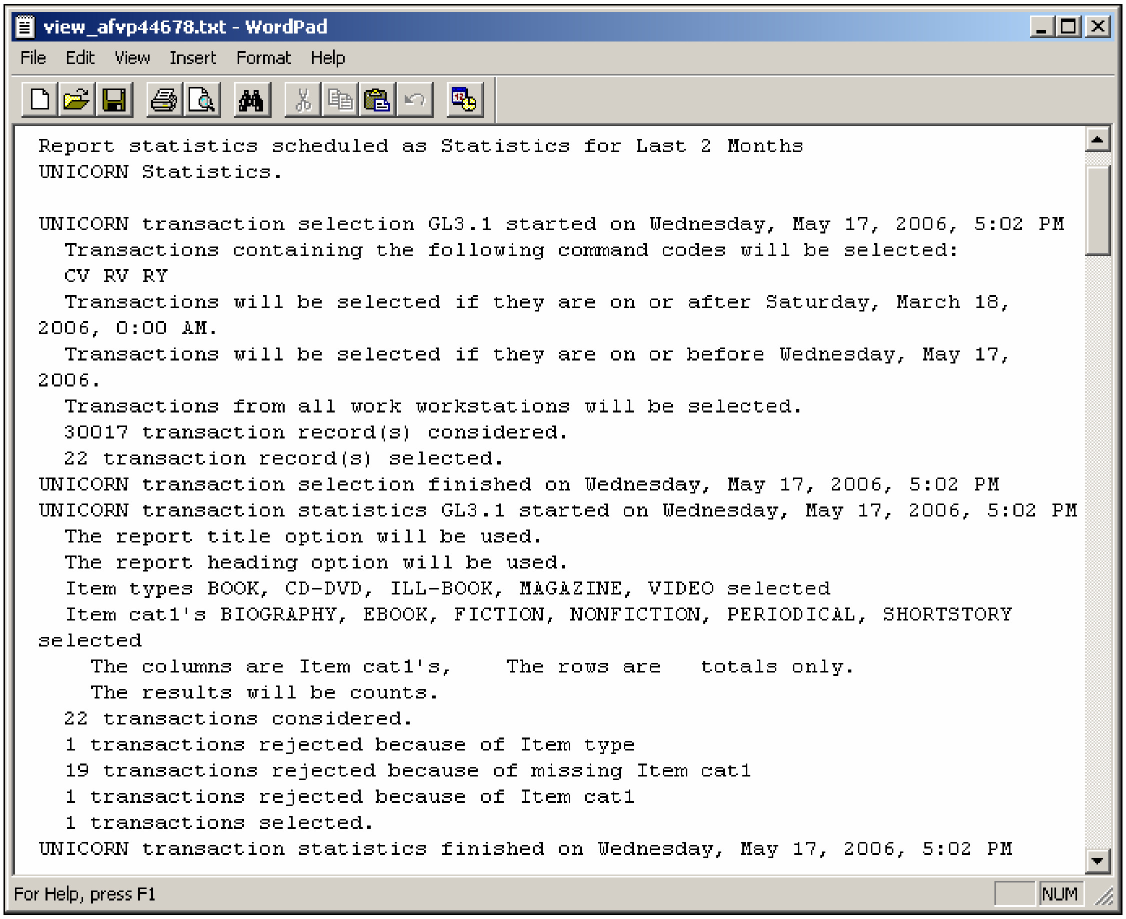
1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the **Administration** tab.
3. In the **Report name** list, select the **Transaction Statistics** report and click **Setup & Schedule**.
4. On the **Basic** tab, in the **Report Name** box, change the name of the report to "Statistics for Last 2 Months."
5. Click the **Transaction Selection** tab.
6. Select the **Date Range** gadget for the **Transaction Date Range** field. The Date Range gadget window appears.
7. Select a start date.
8. Select an end date.
9. Click **OK**.
10. Select the **Policy List** gadget for the **Command** field. The Command gadget window appears.
11. In the **List to Choose From**, select **Charge Item Part B**, **Renew Item**, and **Renew User Part B**. Charge Item Part B, Renew Item, and Renew User Part B should display in the **List Selected**.
12. Click **OK**.
13. Use the Print Separate Reports for Each Library tab to organize and print the data by library.
14. Click the **Transaction Statistics** tab.

15. Select the **Policy List** gadget for the **Item Type** field and proceed to select desired policies by clicking the right-pointing arrow moving selections into the List Selected window.
16. Click **OK**.
17. Select the **Policy List** gadget for the **Item Category 1** field and proceed to select desired policies by clicking the right-pointing arrow moving selections into the List Selected window.
18. Click **OK**.
19. After you select you output options:
    - Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**. The Schedule Confirm window appears. Click **Schedule a New Report** to return to the list of templates.

      -Or-

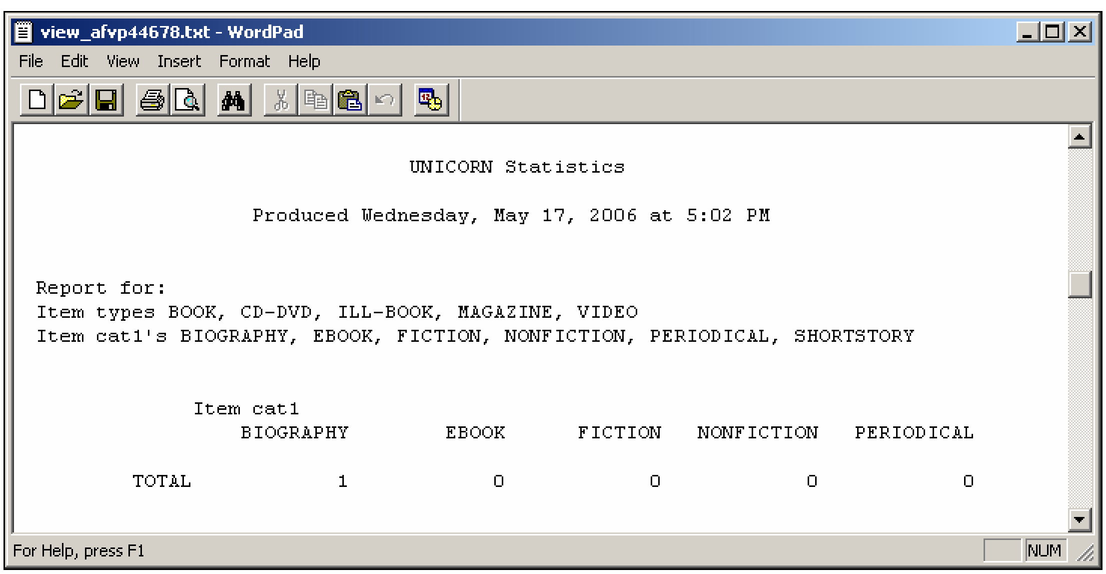
    - If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP. Click **OK** to return to the list of templates.

Transaction Statistics Report Log




```
Report statistics scheduled as Statistics for Last 2 Months
UNICORN Statistics.

UNICORN transaction selection GL3.1 started on Wednesday, May 17, 2006, 5:02 PM
  Transactions containing the following command codes will be selected:
  CV RV RY
  Transactions will be selected if they are on or after Saturday, March 18,
2006, 0:00 AM.
  Transactions will be selected if they are on or before Wednesday, May 17,
2006.
  Transactions from all work workstations will be selected.
  30017 transaction record(s) considered.
  22 transaction record(s) selected.
UNICORN transaction selection finished on Wednesday, May 17, 2006, 5:02 PM
UNICORN transaction statistics GL3.1 started on Wednesday, May 17, 2006, 5:02 PM
  The report title option will be used.
  The report heading option will be used.
  Item types BOOK, CD-DVD, ILL-BOOK, MAGAZINE, VIDEO selected
  Item cat1's BIOGRAPHY, EBOOK, FICTION, NONFICTION, PERIODICAL, SHORTSTORY
selected
    The columns are Item cat1's,    The rows are   totals only.
    The results will be counts.
  22 transactions considered.
  1 transactions rejected because of Item type
  19 transactions rejected because of missing Item cat1
  1 transactions rejected because of Item cat1
  1 transactions selected.
UNICORN transaction statistics finished on Wednesday, May 17, 2006, 5:02 PM
```

Transaction Statistics Report




```
                              UNICORN Statistics

                  Produced Wednesday, May 17, 2006 at 5:02 PM


Report for:
Item types BOOK, CD-DVD, ILL-BOOK, MAGAZINE, VIDEO
Item cat1's BIOGRAPHY, EBOOK, FICTION, NONFICTION, PERIODICAL, SHORTSTORY


             Item cat1
                 BIOGRAPHY        EBOOK      FICTION   NONFICTION   PERIODICAL

        TOTAL            1            0            0            0            0
```

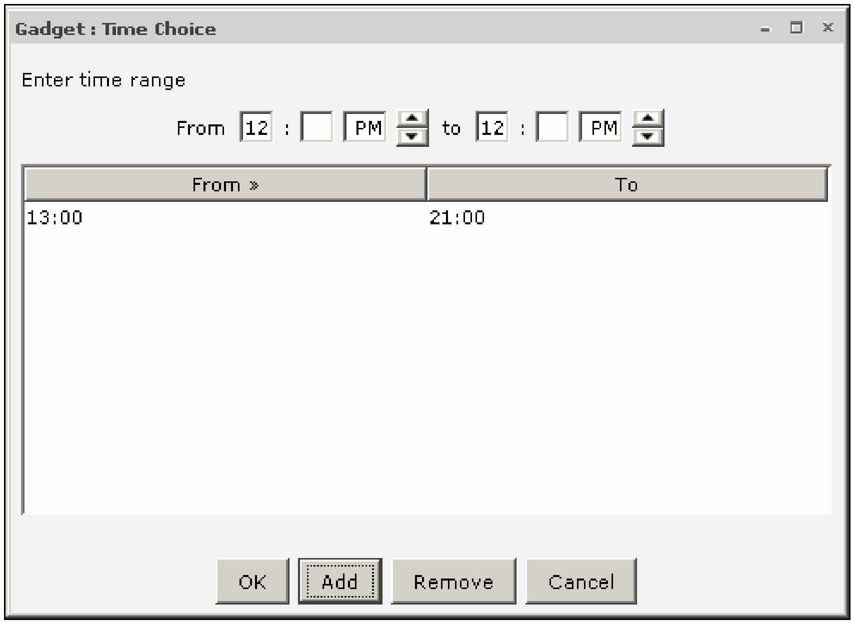
Transtat Display Gadget

In statistics reports that allow you to make statistical selections or changes to the output of column and row displays, some of the statistical options are more useful as ranges. For example, you may want to select a time frame rather than a particular moment, or a call number range rather than a specific call number, or a general age range rather than a particular birth year. Or you may want to select a specific list of a certain kind of data, such as specific ZIP codes.

1. Enter the data or beginning of the range in the first text box.
2. If your data is a range, enter the end of the range in the second text box.
3. Click **Add** to complete the data addition or range.
4. Repeat the above steps until all data or ranges have been entered, then click **OK** to finish.

The Transtat Display gadget is used only when selecting or outputting the following data.

Option	Description
Call Number	Call number ranges are determined by the shelving key of the item. Range selections will mirror a call number sorted search of the workstation, although there is no way to specify a particular classification scheme.
Flexible Key	You can select a range of flexible keys to be included in your report using the Transtat Display gadget. If you want to include flexible key ranges in your report, select a flexible key range to display as the column head or row name on the Transaction Statistics tab using the Display Choice for Transaction Statistics gadget.
Time	The time entered will display in HHMM in 24-hour military format. For example, 8:00 a.m. to 5:00 p.m. would be displayed as 08:00 – 17:00.



Option	Description
Birth Year	Birth year must be entered exactly as it appears in the Birth Year field of the user record.
ZIP Code	Statistics can be displayed for users in a particular ZIP code. Up to five character codes can be entered. United States ZIP codes, as well as non-United States ZIP codes are displayed, based on the Is US Zip Code field on Transaction Statistics Selection tab. For more information, see WorkFlows Online Help. Keep in mind that selecting the Transtat Display gadget when any selection other than these is displayed in a corresponding list during the output phase will return the following error: `No category selection available.`

Appendix A – Follow-Up Exercises

Set up a Count Report

You are filling out a report that asks how many of your users have items checked out. Run the Count Users report to find out.

1. Click the **Schedule New Reports** wizard.
2. Click the **User** tab.
3. Select the **Count Users** report.
4. Click the **User Selection** tab.
5. Select the **Number of Charges** gadget.
6. Select the greater than sign (>) and type **0**.
7. Click **OK**.
8. Click **Run Now**.
9. Go to the **Finished Reports** wizard to view the results.

Set up a List Report

Your number of missing books is starting to pile up, so you want to search for them. You need a list of all items that have been marked missing. You will need the title and author of the items, along with the call number where they should be found. Run the List Items report to get this list.

1. Open the **Schedule New Reports** wizard.
2. Click the **Bibliographic** tab.
3. Select the **List Items** report.
4. Click the **Copy Selection** tab.
5. Select the C**urrent location** gadget.
6. Select **Missing** in the list to choose from and click the arrow to move it to the list selected.
7. Click **OK**.
8. Click the **Print Item** tab.
9. Under Title Information, select the **Entry list** gadget.
10. Select the **List** option. Select **100** and **245** in the list to choose from and click the arrow to move them to the list selected.
11. Click **OK**.
12. Select the **Entry list only** option.
13. Under Call Number Information, select the **Call number only** option.
14. Click **Run Now**.
15. Go to the **Finished Reports** wizard to view the results.

Set up a Statistics Report

You want to know how many people with various user profiles have a high number of items on hold. You want this broken down by all the libraries in your system. Run the Current Users Statistics report to find out.

1. Open the **Schedule New Reports** wizard.
2. Click the **User** tab.
3. Select the **Current Users Statistics** report.
4. Click the **User Selection** tab.
5. Select the **Number of holds** gadget.
6. Click the greater than sign (>) and type **4**.
7. Click **OK**.
8. Click the **Transaction Statistics** tab.
9. Select **User profile** from the drop-down menu for Column.
10. Select **User library** from the drop-down menu for Row.
11. Click **Run Now**.
12. Go to the **Finished Reports** wizard to view the results.

Appendix B – WorkFlows Navigation

Overview

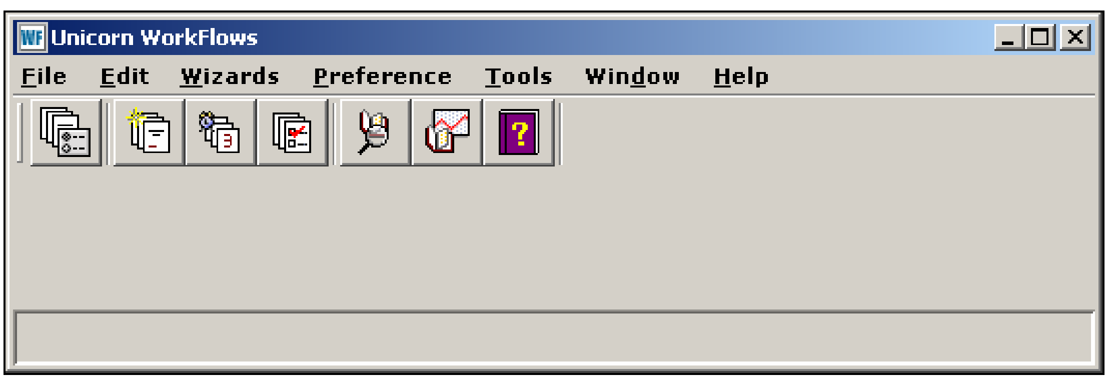
This chapter explains how to navigate in WorkFlows.

WorkFlows Desktop

The WorkFlows desktop is a graphical user interface that consists of the standard Windows elements such as the menu bar, status bar, maximize, minimize, and close buttons. The desktop also displays toolbars. Toolbars are used to access the WorkFlows wizards.

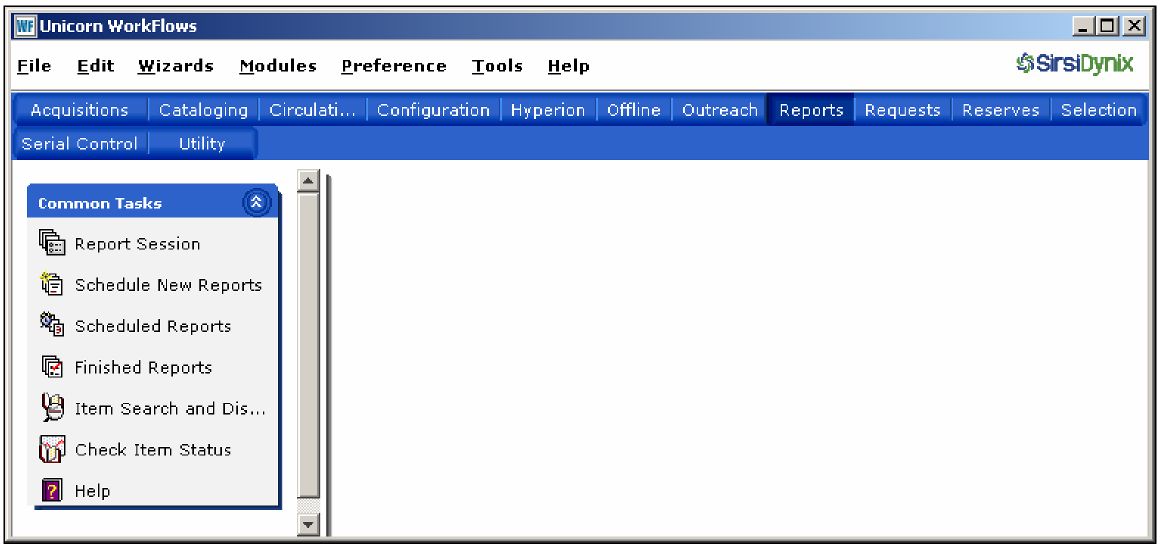
Classic View

WorkFlows classic view is similar to the look of previous versions of WorkFlows. Desktop customization is available in the Desktop Setup selection under Preference in the Menu Bar.



Themes

In the WorkFlows Themes view, wizard names appear next to the wizard icons and available modules are displayed under the menu bar. There are several color themes available in the Desktop Setup preferences. The preference used throughout this Training Guide is Primary Blue.



Toolbar

A toolbar displays a group of icons representing wizards.

- A toolbar is available for each Symphony module.
- You can change toolbars using the drop-down menu command or using the right mouse button.
- You can create custom toolbars for getting particular jobs done at individual workstations by defining the wizards and wizard groups that display on the WorkFlows toolbar.
- If you make any changes to the WorkFlows toolbar, you have the option to save or not save your changes on the workstation when exiting WorkFlows.

The toolbar in the Themes view of WorkFlows has the same functionality as the Classic view, are accessed differently. Module selections appear at the top of the WorkFlows workspace and wizards contained in the active module appear on the left side of the screen by default.

Wizards

A wizard is a button on a toolbar that performs a series of tasks. When you move the pointer over a wizard icon, the wizard name appears. This is sometimes referred to as balloon help.

NOTE Additional details about WorkFlows desktops are in the WorkFlows Online Helps.

Navigation

Moving Around a Window

You can move through the WorkFlows interface using keyboard shortcuts and/or your mouse.

Moving between fields

- Press TAB to advance to the next field.
- Press SHIFT+TAB to return to the previous field.

Accessing the Menu Bar

Use the menu bar to access commands, set preference, and access the Online Help.

ALT+letter

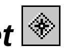
Press the ALT key with the appropriate underlined character to open menus.

Shortcut Key	Action
ALT+P	Opens the Preference menu.
ALT+T	Opens the Tools menu.

Once a menu is open, you may press the appropriate underlined letter to access commands from the drop-down menu and submenu.

Terms to Know

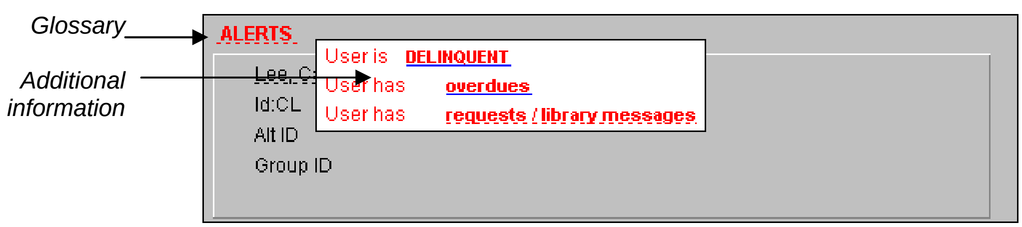
This section provides definitions for commonly used WorkFlows terms.

Gadget 

Gadgets make selecting field values easier. Use gadgets to select information such as date/time ranges, policy values, or monetary amounts. To ensure that you enter the correct information, in the correct format, click an available gadget. Commonly used gadgets will be discussed throughout this guide. For more information on gadgets, refer to the WorkFlows Online Help.

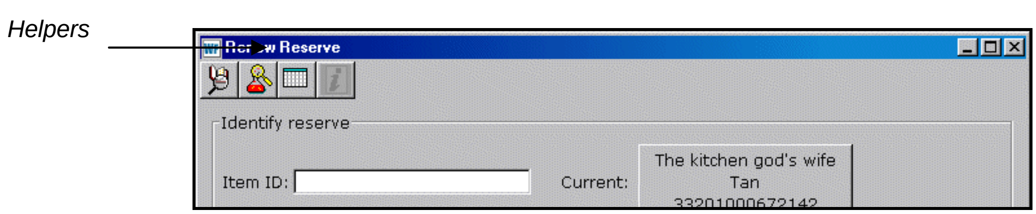
Glossary

Glossary is any word in WorkFlows that appears with a dashed line. When you click the word, a pop-up window appears with additional information.



Helpers

A helper is a "wizard within a wizard." Helpers make it easier to access information needed by the current wizard. Helpers are located just below the title bar.



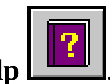
Shadow Catalog

The shadow catalog contains records searchable only by library staff. For example, you might want to hide or "shadow" records from patrons, such as lost or missing items or items still being cataloged.

Users at public workstations can search and display items only from the standard catalog. Users at staff workstations using WorkFlows can search and display items in the standard catalog, the shadow catalog, or both.

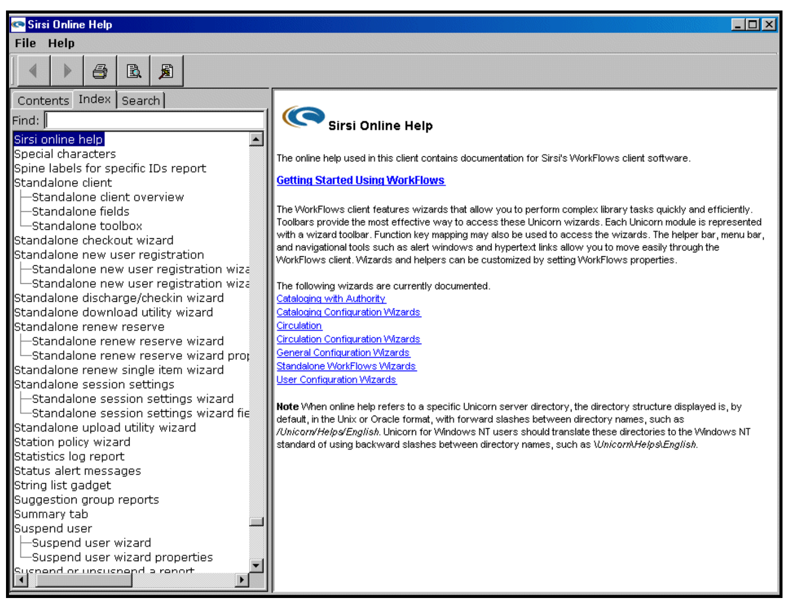
Getting Help

If you have a question about a specific task while working in any WorkFlows module, refer to the WorkFlows Online Help. You can access Help using any of the following methods:

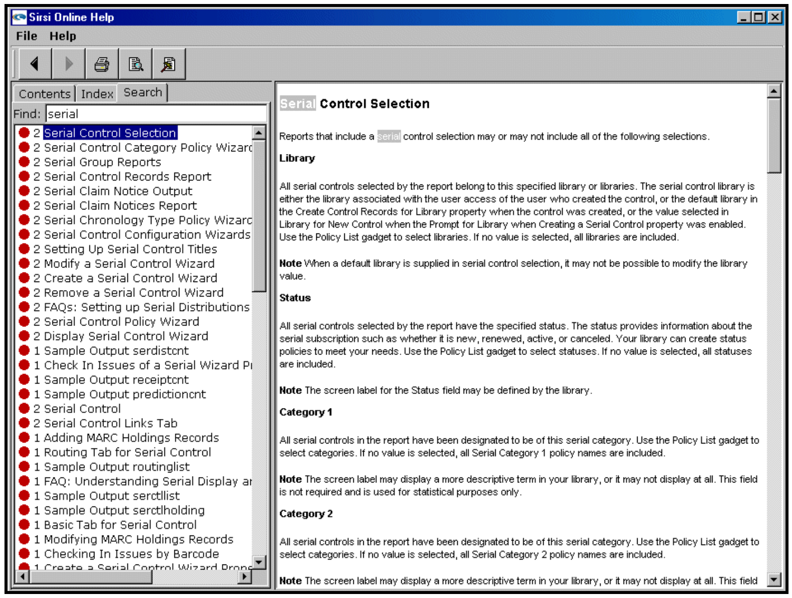
- On the toolbar, click **Help** .
- Press F1.
- On the **Help** menu, click **Contents** or **Context.**

Help is context-sensitive. That is, the information that displays is specific to the task you are performing when you access the Help file.

1. Access the Help file and click the **Index** tab to display this window. The Index is an alphabetical list of every Help topic available.



2. Click the **Search** tab to display this window. The Find feature searches the entire Help database for words used in the content of Help topics.



3. In the **Find** box, type the word or phrase you want to find, and press ENTER. The Help file looks for the terms and displays a list of likely topics.
4. Scroll through the list until you find the topic you want.
5. Double-click the topic you want. The information about that topic appears to the right.

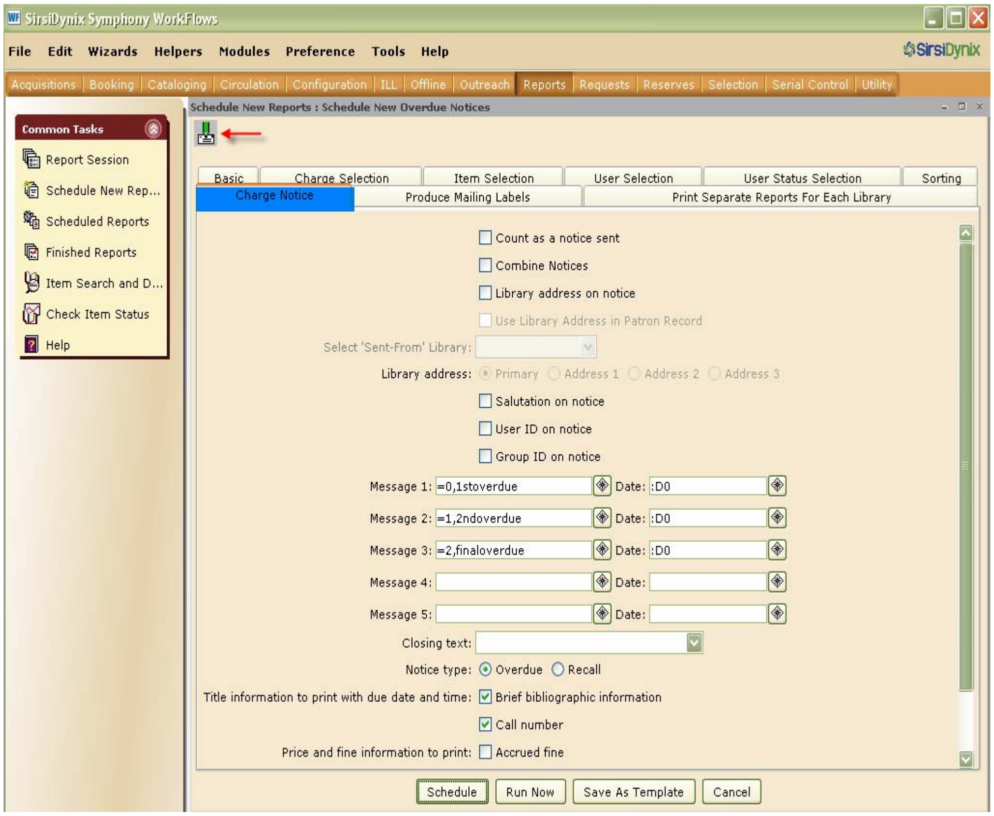
Appendix C- Language Field Notice Text Creation

Creating Notices in Multiple Languages

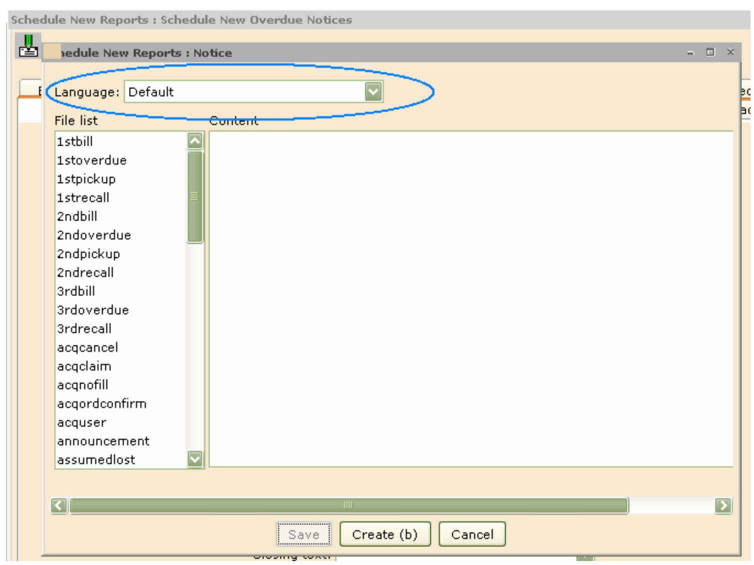
The Notices helper can be enabled for reports that create and print notices. You can use this helper to modify or create notice text. This helper not only allows the creation and modification of delivered notices, but also the creation of notices in multiple languages, to work with the Language field of the user record.

1. To create the notice text that corresponds with the Language field, open the Reports Module.
   - A supervisor or system administrator must turn on the Notice helper by right clicking on the Schedule New Reports wizard, selecting properties and checking the Display Notices Helper box.
2. Open the Schedule New Reports wizard.
3. Select any Notice report and the Setup & Schedule button at the bottom.

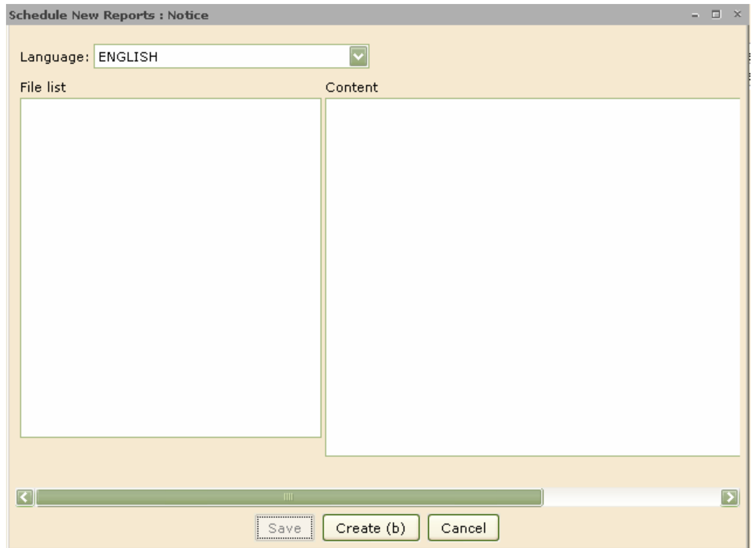
   To use the Notice Helper, you must be on the tab dealing with notices.



4. Click on the Notices helper to make it display.
    - The default language is set to the language your Server has been delivered in.

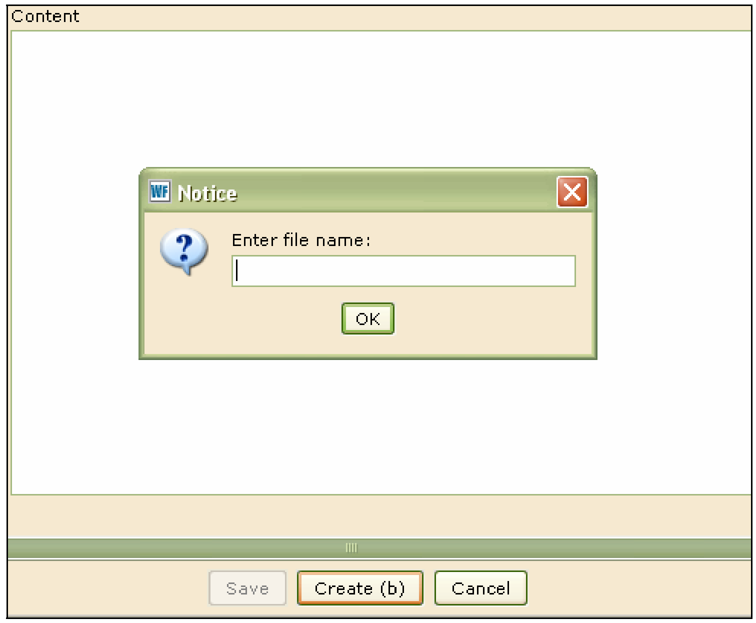


5. Use the drop-down list to select a different language.
    - As seen here, initially there are no files. You must create them.



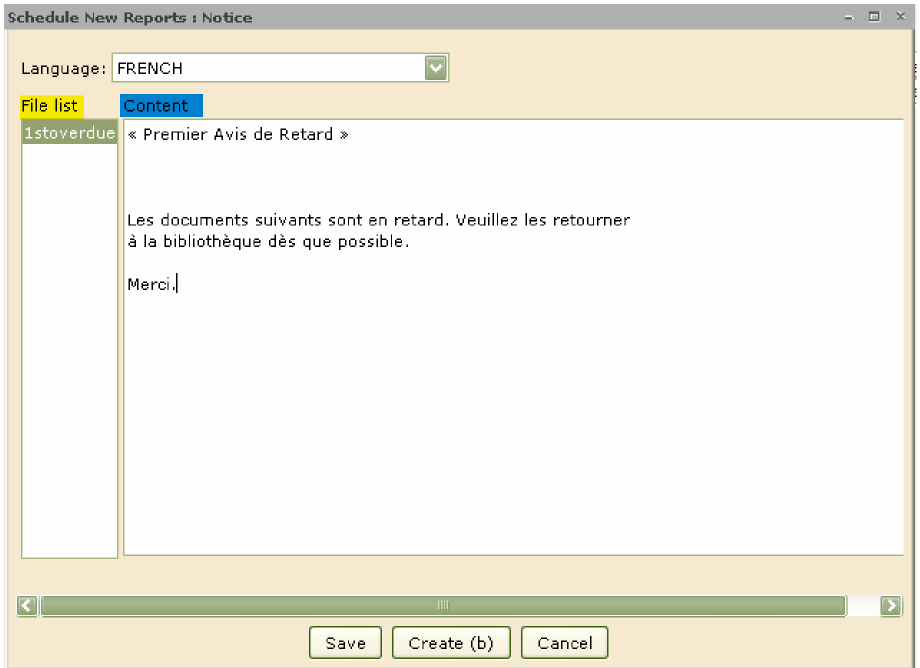
6. SirsiDynix recommends using the default file names when creating notices in other languages, as seen listed under the Default language selection.

7. To do this, select a language from the drop-down list, click the **Create** button at the bottom, and enter a file name.



Note	Delivered notices may be created the same way. However, to modify text, simply make the edits and click save.

8. Now the file name will appear in the file list. Click in the Content area and type your text.



9. When you have finished typing your text, click **Save**.
10. ***Please note:*** This will need to be done for every type of notice text, in order to use the new language feature for all of your Notices.
11. Click **Cancel** to close out this helper.

Example Notice text:

```
Wednesday, November 7, 2007

E. A. Arrowood Foundation Library



                                                      ID: MARILYNB
          Marilyn Bigney

Dear Marilyn Bigney,
Primera noticia * materiales atrasados

Los materiales siguientes de la biblioteca estan atrasados.  Favor de
regresar todos los siguientes materiales lo mas pronto posible.

Muchas gracias.

  1  call number:G465 .P4835 2002                        ID:31000234586689
     Over sand and sea : a traveler's tales / Patrick Pfister.
     Pfister, Patrick.
     due:11/2/2007,12:00
```

```
E. A. Arrowood Foundation Library



                                                      ID: MIKEH
          Mike Hilmo

Dear Mike Hilmo,
* Premier Avis de Retard *


Les documents suivants sont en retard. Veuillez les retourner
* la biblioth*que d*s que possible.

Merci.

  1  call number:PR6015.U565 O94 2003                    ID:31000234598938
     Over here / Alan Hunter.
     Hunter, Alan.
     due:11/2/2007,12:00
```

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V

W