



SirsiDynix[®]

SirsiDynix Symphony Training Guide

Report Basics

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Introduction

The SirsiDynix Symphony Report Basics training guide provides instruction on running delivered reports. Specifically, this guide illustrates step-by-step workflows in task-driven settings. Instruction is supported by exercises to help you master the training objectives listed at the beginning of each new section.

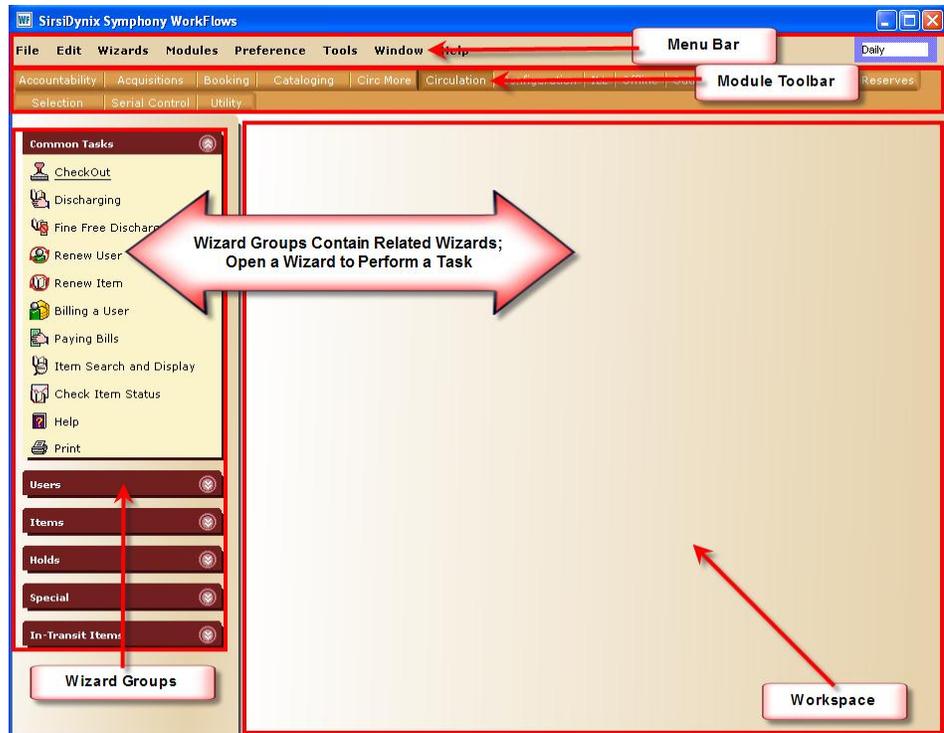
This guide typically accompanies instructor-led training. It can also be used as a review, reference, or independent study document.

The SirsiDynix Symphony Report Basics training guide consists of seven main sections. Below is a short summary of each:

- Overview. Introduces you to report functions and types.
- Working with Report Features. Discusses the different options available in the Reports module such as scheduling reports, viewing, printing, and emailing report output and removing finished reports.
- Count reports. Outlines how to run reports that will provide a count of records within a database.
- List reports. Provides instructions on how to run reports that will provide a list of records that meet specified selection criteria.
- Statistics reports. Introduces how to run reports that will provide column and row output of statistical data.
- Notice reports. Introduces how to run reports that will notify users about library activity.
- Session Settings. Reviews the session settings that affect viewing/printing in applications, notice formatting and e-mailing.

The purpose of this training guide is to provide quick and accurate information about using the SirsiDynix Symphony system. This introduction begins with an orientation to the screen layout and how to navigate within the system. When opening SirsiDynix Symphony, a screen like this displays:





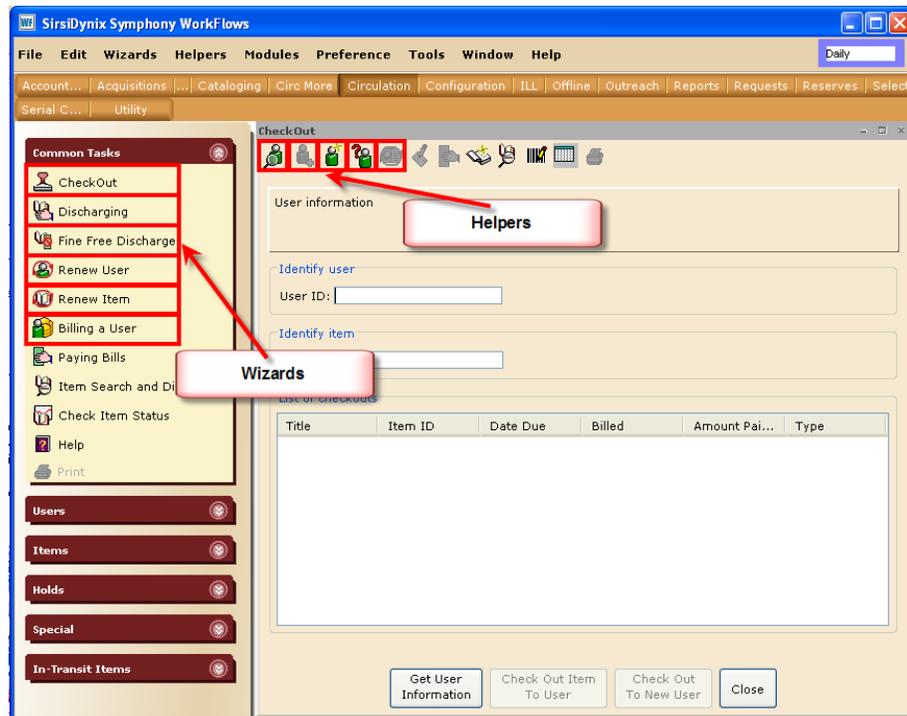
These are the parts of the Symphony screen, as called out in the preceding screen shot:

- Module Toolbar. Grants access to available modules. Only modules relevant to your job display. Move between modules by clicking on the module toolbar.
- Menu Bar. Provides context-sensitive tools to perform tasks. The system has built-in redundancies (menu bar, buttons, field information, key commands) to perform tasks.
- Wizard Groups. Organizes wizards into grouped sets that perform related workflows. The arrow in the upper right-hand corner opens or closes the group. Double click on a wizard to open it on the workspace.
- Workspace. Displays the wizards that have been opened. If your system is profiled to do so, windows open one on the top of another so you can have many wizards open at once, moving freely between them.

Wizards and Helpers

Wizards and Helpers are tools used to conduct work within SirsiDynix Symphony. Wizards are labeled icons – the icon visually represents what the tool does, and the label describes the tool’s function. A Helper displays a balloon tooltip when you hover over the icon.

Each entry in a Wizard Group is a wizard. A Helper displays at the top of a workspace in a Helper bar. (A Helper has the same name and label as its equivalent wizard). A Helper is a Wizard that has conveniently been placed inside of a wizard so that related workflows can be addressed from a single reference point.



The *Discharging* wizard is the tool you would use when performing Checkin-related workflows. A *User Registration* wizard or Helper is the tool you would use to create a new user on the system.

A library administrator has the ability to organize toolbars and change the labels of wizards. This customization of the SirsiDynix Symphony user interface lets you organize SirsiDynix Symphony for specific groups of people or those performing a specific job function.

Using This Training Guide

This guide has been designed for use during a SirsiDynix instructor-led training. It also has been designed to be used as a reference work for the class. Icons are used throughout the manual for different purposes. The purpose of each icon is described below.



This icon denotes additional helpful information.



This icon is a warning. Pay special attention to this information!



This icon indicates reference information available in another manual or to another chapter within this manual.

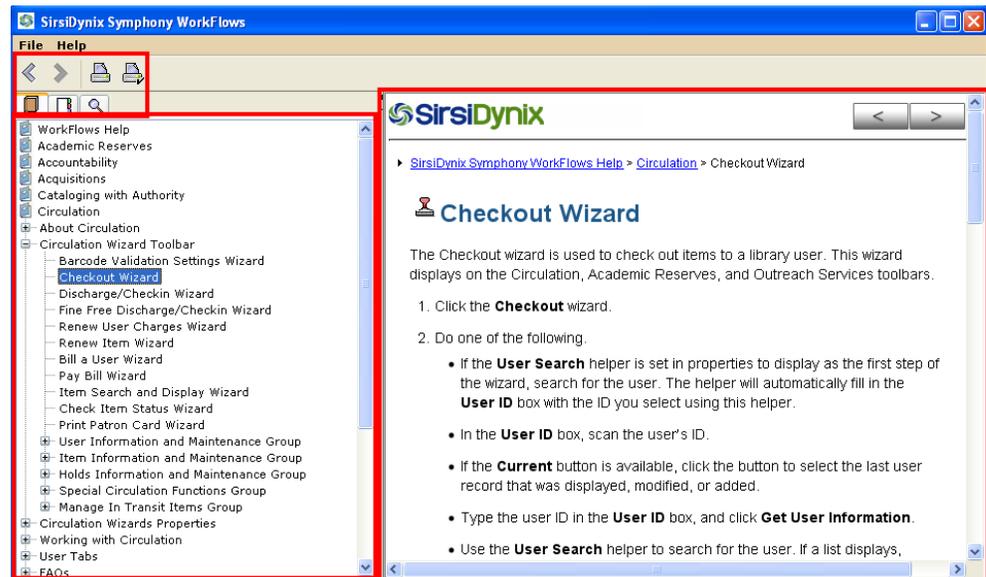


This icon directs you to the SirsiDynix Symphony online Help file where you can find additional or related information.

Help Files

The SirsiDynix Symphony system comes with an extensive set of online Help files. Every toolbar in your SirsiDynix Symphony system has a Help icon (a purple book with a yellow question mark on it). You can access Help files through the toolbar icon, from the Help option on your menu bar, or by pressing the F1 key when within SirsiDynix Symphony.

Help files are organized either context sensitive to the screen presently displaying, or topically through a table of contents:



The Help File screen has been divided into three parts for explanation:

- Icons are available to move forwards and backwards through the Help topics, to print, to access an index, and to search.
- Information is organized topically in the left-hand window. Click on a plus sign (+) to open a folder; click on a minus sign (-) to close it.



- The Help file is presented in the right-hand window. The information in the Help file assists in understanding more about software functionality and how to perform relevant workflows.



When you need help with a task, consult the online Help Files first. Your online Help Files are a comprehensive information set of SirsiDynix Symphony WorkFlows.

Searching Basics

Searching for records within the SirsiDynix Symphony client is straight forward. In each case you are searching the database for records—once you find the desired record you put it to use in the current workflow.

When using SirsiDynix Training Guides, specific tasks will instruct you to “search for a record,” or, “perform a search and select a record.” This section reviews the basics of searching for and selecting records in SirsiDynix Symphony.

To search for a user record:

1. Open the *Checkout* wizard.
2. Click on the *User Search* helper at the top of the Checkout window. A user search pop-up like this one displays:

The screenshot shows the 'Checkout' window with the 'User Search' pop-up. The search input field and the 'Search' button are highlighted with red boxes. The pop-up includes a search form with the following fields and options:

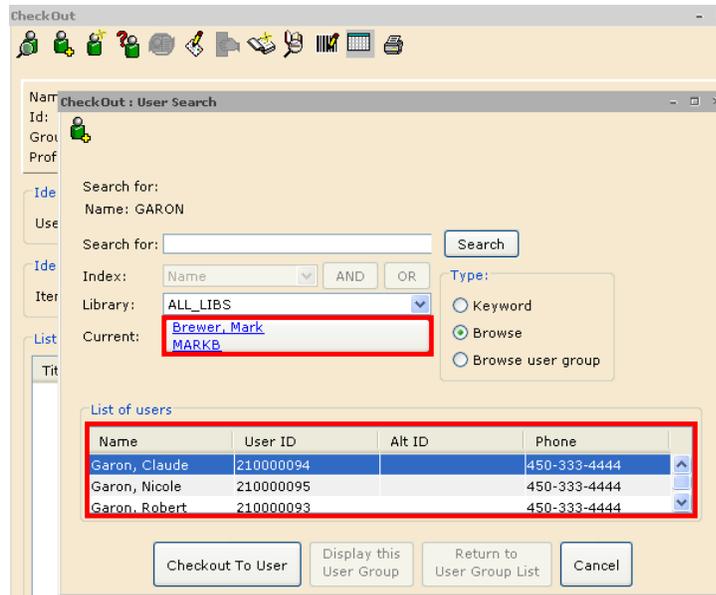
- Search for:** (text input field)
- Search** (button)
- Index:** Name (dropdown menu)
- AND** (button)
- OR** (button)
- Library:** ALL_LIBS (dropdown menu)
- Type:**
 - Keyword
 - Browse
 - Browse user group

Below the search form is a table titled 'List of users' with columns: Name, User ID, Alt ID, and Phone. At the bottom of the pop-up are buttons: 'Checkout To User', 'Display this User Group', 'Return to User Group List', and 'Cancel'. At the bottom of the main 'Checkout' window are buttons: 'Get User Information', 'Check Out Item To User', 'Check Out To New User', and 'Close'.

The *User Search* and *Item Search* helpers are highlighted at the top of the window. Within the Search window there are options to specialize a search by Index, Boolean operators, Library, or Type.

3. Enter a search term, refining it with any of the special search functions, and click **Search**.

The system displays the results of your search. When there are multiple matches to your search, they display as a list in the lower part of the window:



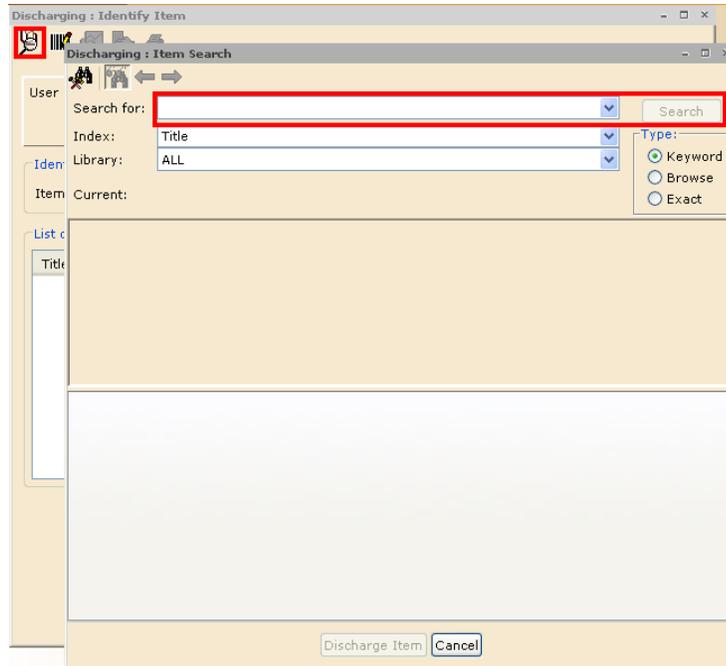
Notice that the most recent (current) borrower displays by default. The names that matched your search entry display in list form.

4. Select the desired user and click **Checkout to User**.

To search for an item record:

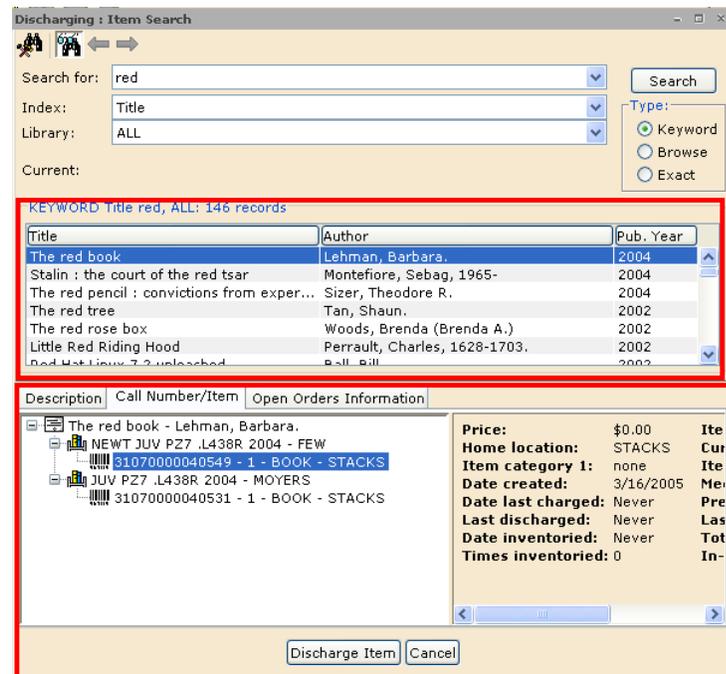
1. Click on the *Discharge* (Checkin) wizard.
2. Click on the *Item Search* helper. An Item Search window displays:





3. Enter a search term, refining it with any of the special search functions, and click **Search**. Within the Search window there are options to specialize a search by Index, Library, or Type.

Your search results display:



Matches display in the upper window, while bibliographic, call number, and item information display in the lower window.

4. Select the desired item and click **Discharge Item** to check the book back in. The system automatically directs you if there is a hold, fine, transit, or other information about the item.



Overview

In this section, we introduce you to how SirsiDynix Symphony reports can be used and the different types of reports that are offered.

Upon completion of this section, you will be able to:

- Identify the different report types.
- Select the proper report group based on the type of information you want the system to generate.
- Select the proper report to accomplish some objective.

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.



SirsiDynix defines the term “report” to include any process that can be scheduled in Symphony. All Symphony reports fall into one of the following report types:

- Count
- Import/Export
- Label
- List
- Maintenance
- Notice
- Remove
- Statistics

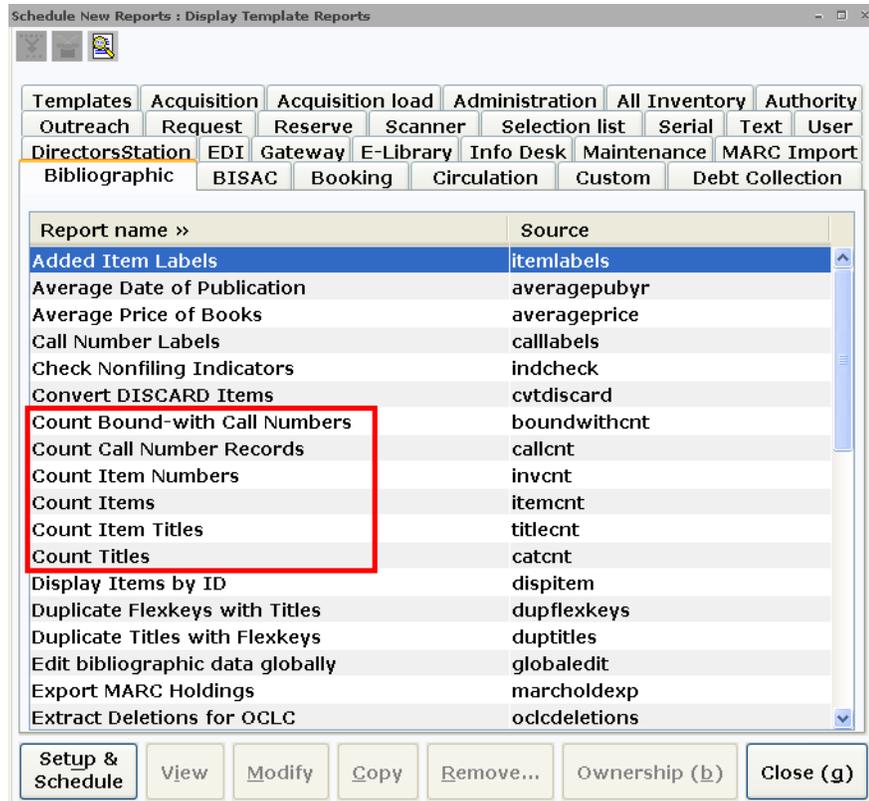
Once you select a report and have made formatting decisions, the report can be scheduled to run immediately, periodically, or saved as a report template to be run later. Reports can be printed, e-mailed, viewed, or saved as a text file (usually in WordPad).

Report Types

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

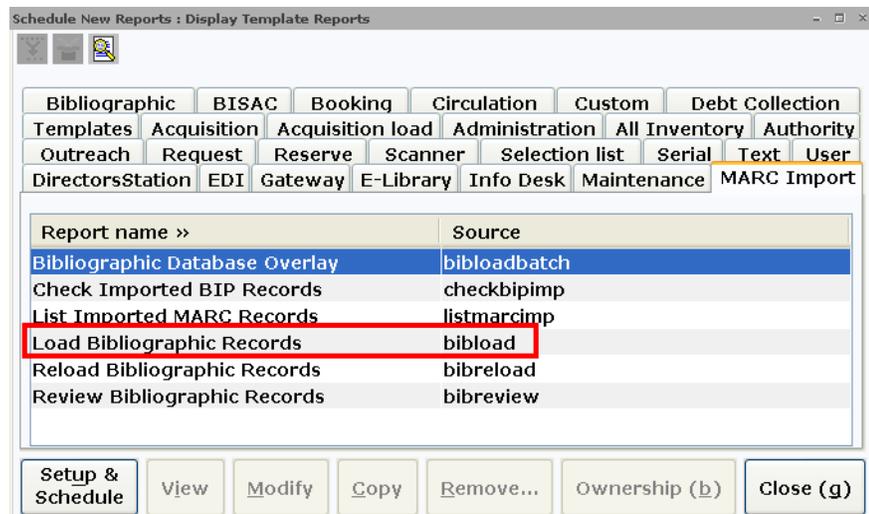
Count

Count reports answer the question, “How many meet these criteria?” Count reports can be found in multiple report groups (e.g., Bibliographic, Circulation, User). The Count Items report in the **Bibliographic** tab of reports is an example of a count report, and is illustrated below:



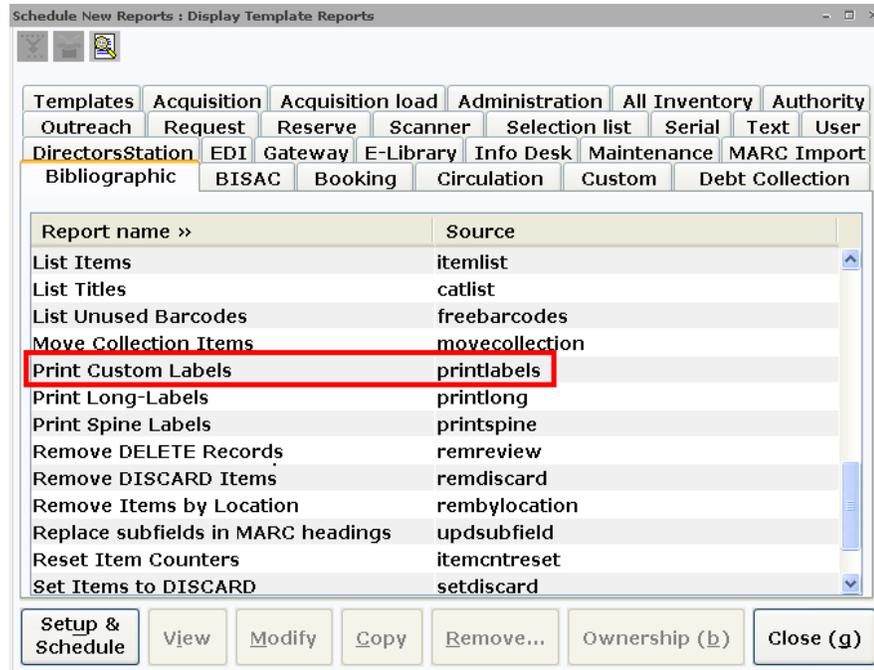
Import/Export

Import/export reports batch-load records into the Symphony system or extract Symphony information for use by an external system. An example of this type of report is the Load Bibliographic Records report in the **MARC Import** tab, as illustrated below:



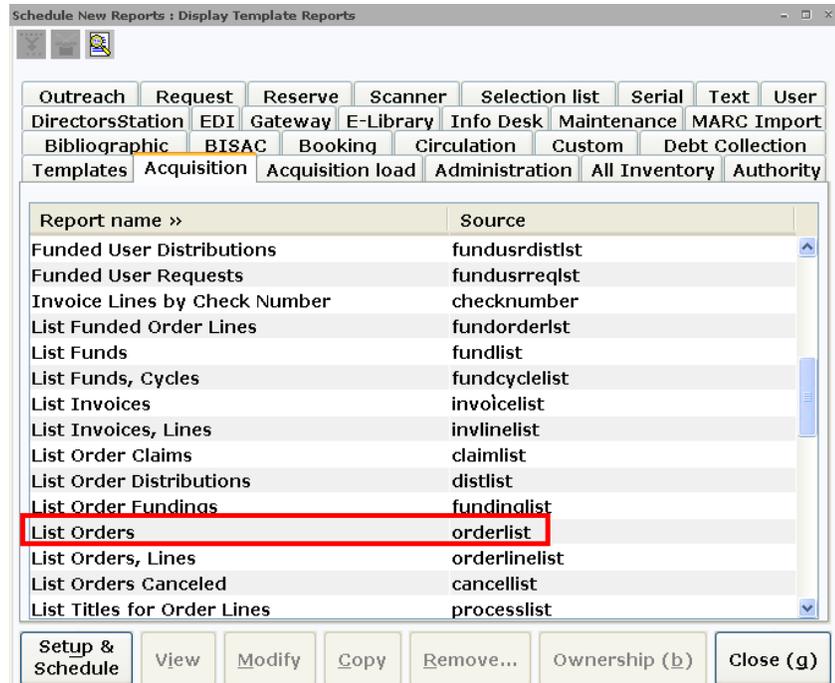
Label

Label reports produce information in a format used for printing labels. An example of this type of report is the Print Custom Labels report in the **Bibliographic** tab, as shown below:



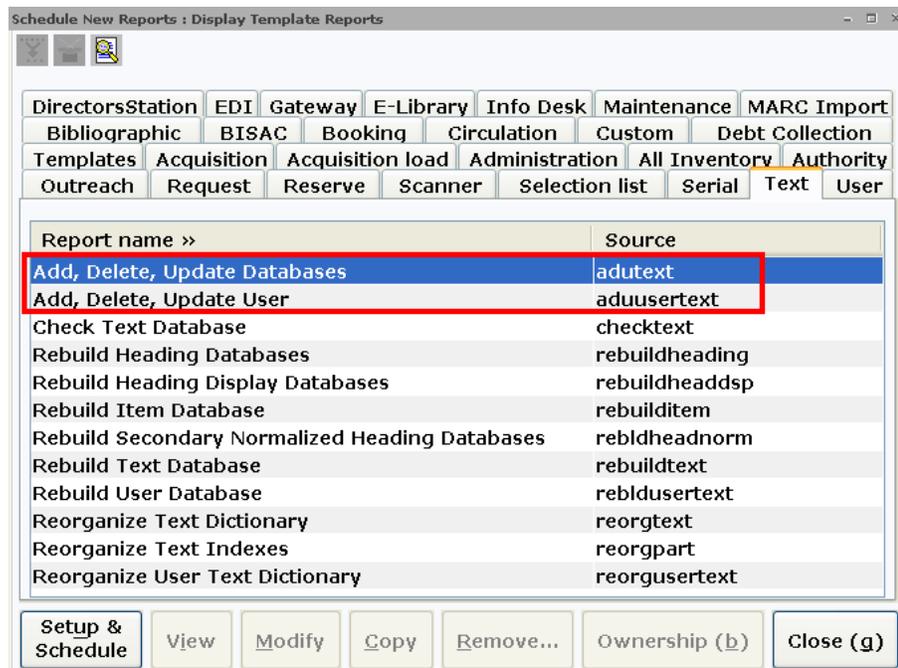
List

List reports answer the question, "Which records meet these criteria?" It is one of the most customizable types of report, meaning that selection criteria and print options dictate the type of list you will produce. An example of the list type of report is the List Orders report in the **Acquisition** tab, as illustrated below:



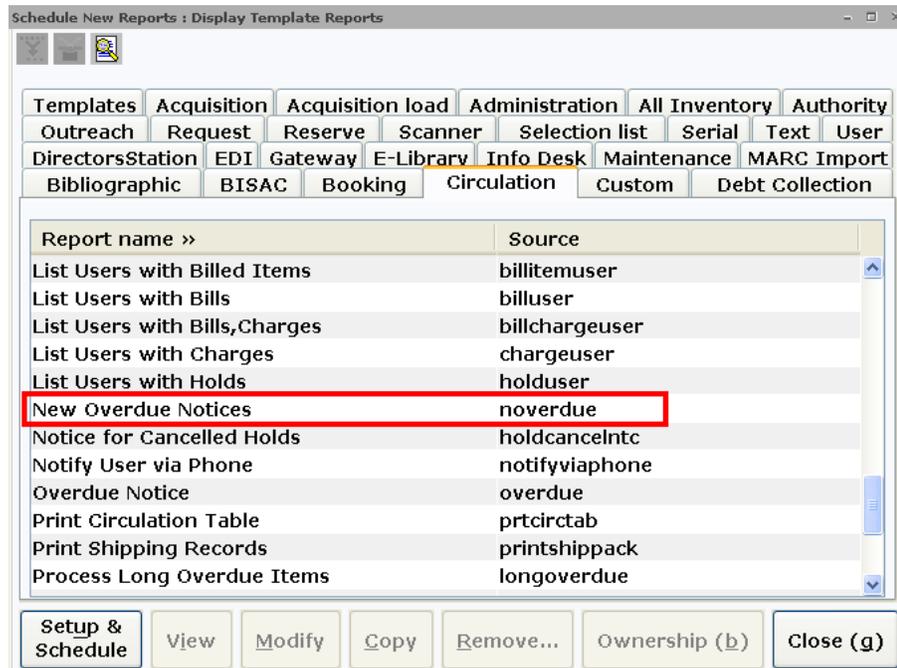
Maintenance

Maintenance reports make various changes to databases in the system. Examples of maintenance reports are the Add, Delete, Update Databases and Add, Delete, Update User in the **Text** tab as illustrated below:



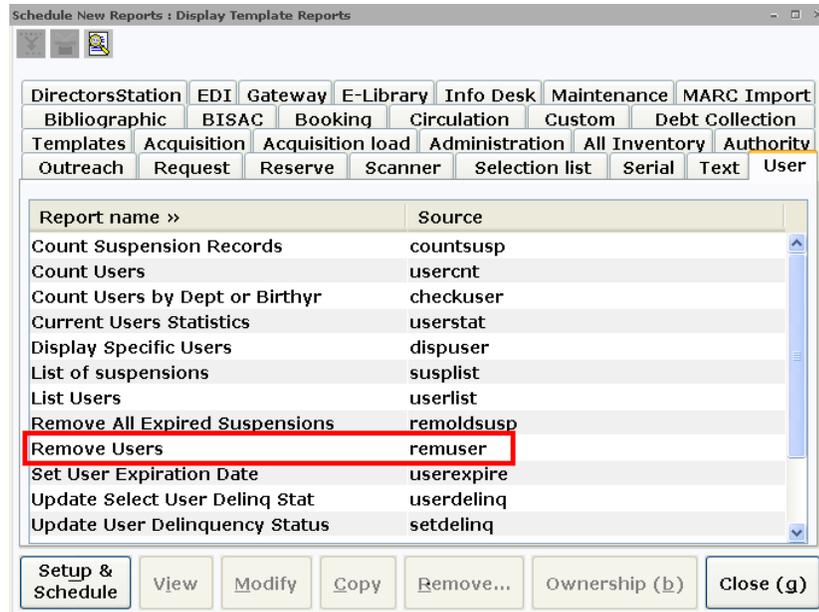
Notice

Notice reports answer the question, “Who needs the library to notify them of what information?” This type of reports allows you to assign criteria to select specific patrons and acquisition vendors who will receive notices. These notices can be e-mailed directly to users or vendors. A good example of this type of report is the New Overdue Notices report, as displayed below:



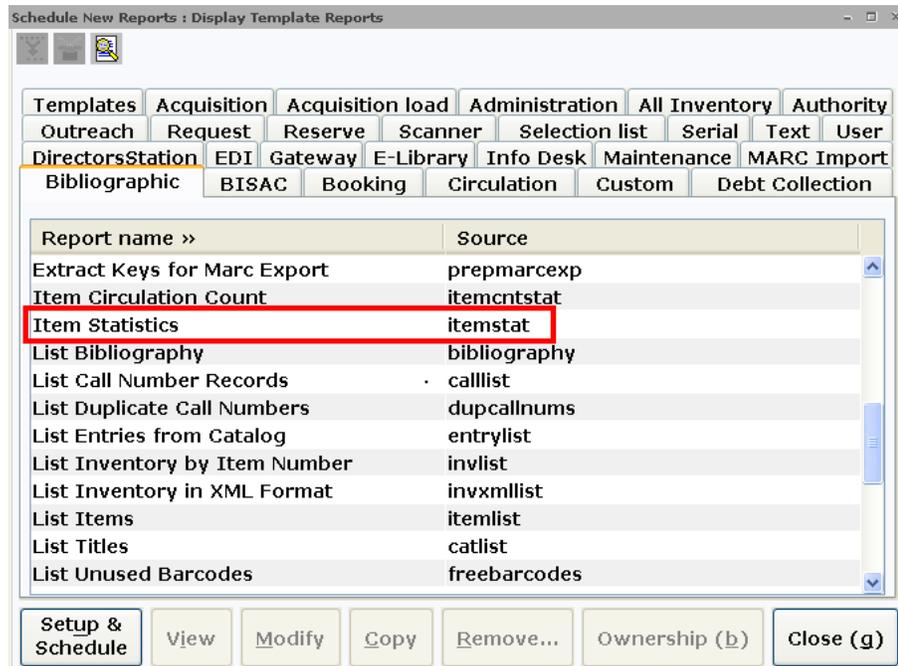
Remove

Remove reports permanently remove information from the SirsiDynix Symphony system. Caution is advised when running reports of this type, and in many cases, these reports are password protected. The Remove Users report exemplifies this type of report, as seen below:



Statistics

Statistics reports produce tables of information gathered from the Symphony system. The Item Statistics report illustrated below is an example of the statistics report type:

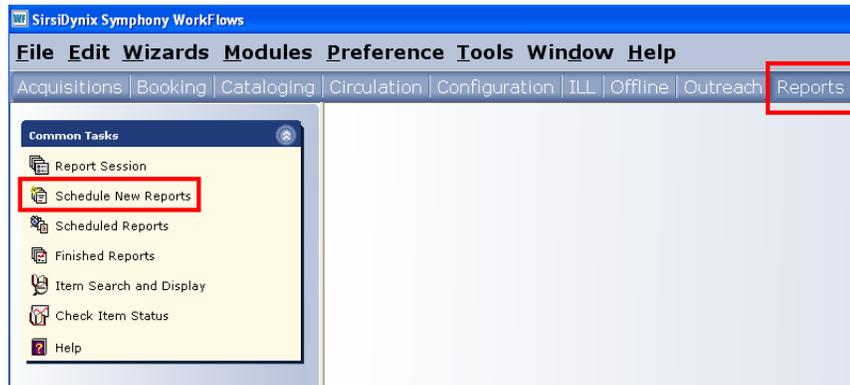


Selecting the Correct Report

To be successful in running reports, you must know to choose a correct report type from a correct report group. Reports in their various types are organized logically into groups that closely relate to system modules. For example, let us say you want to run a report to print out a list of titles

To select a report:

1. From the Reports module, select the *Schedule New Reports* wizard.

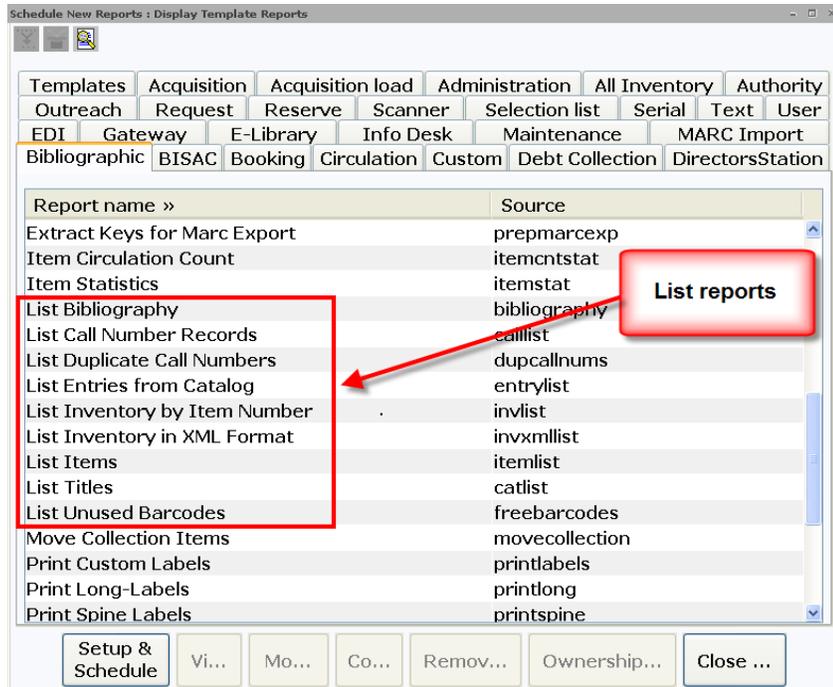


If the Session Settings window or the Schedule New Reports Property window appears, click **OK**.

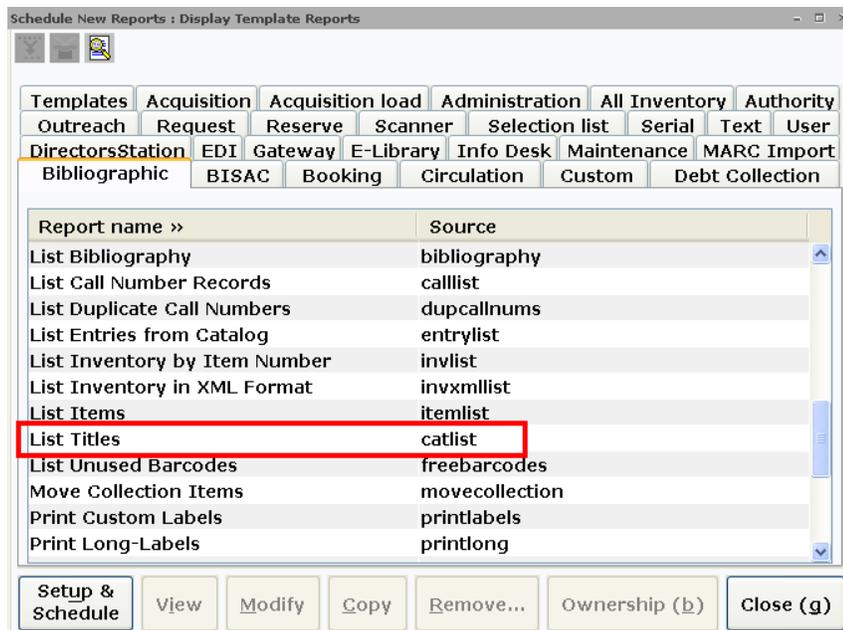
2. Select the group of reports most closely connected to title records; in this case, select the **Bibliographic** tab since the report deals with bibliographic information:



3. Scroll to the report type most closely associated with the task of interest, which should be among reports with “list” as part of the report name.

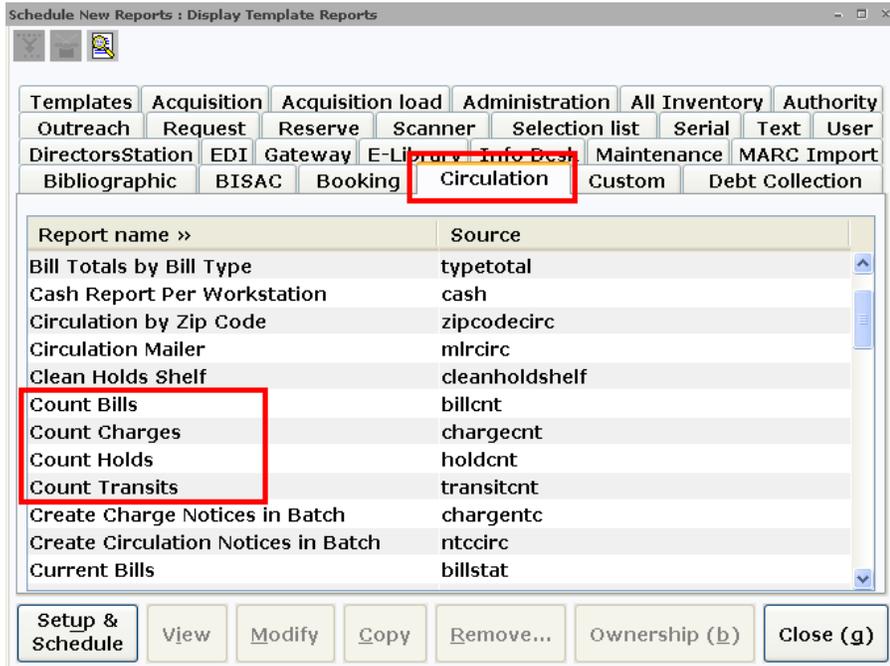


4. Select the report whose title most closely aligns with the task you have in mind. In this scenario, double-click the List Titles report or highlight it and click **Setup & Schedule**.

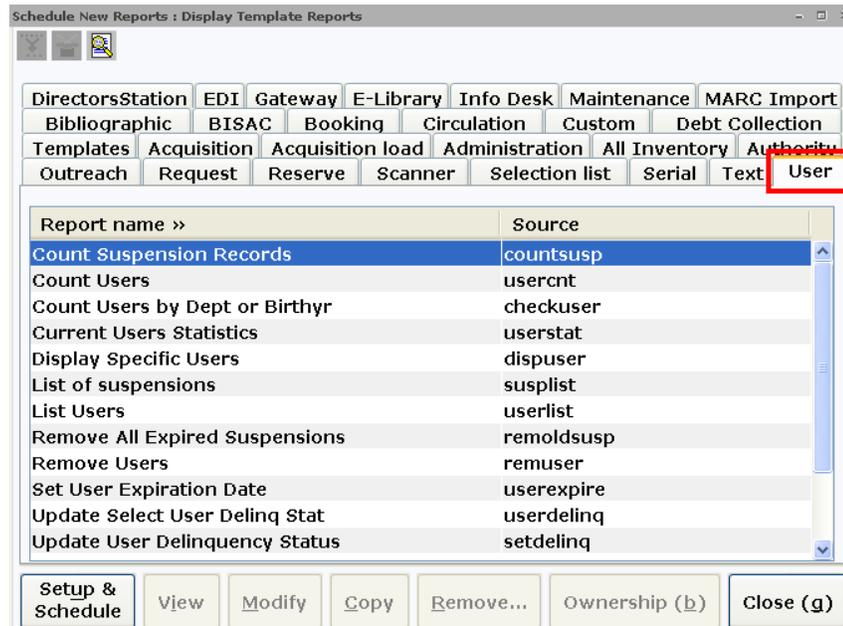


5. However, you may sometimes have to look into multiple report groups to find a report that meets your objective. For example, let us say that you want a count of users at a particular library. It is possible that you could look for the report among the Circulation group of

reports; but in this example you will notice that the Count Users report is not found in the Circulation group as illustrated below:



- You will need to scan the other report groups to see other possibilities, among which is the **User** tab. This group contains the report you desire.



In this group of reports, you will also see a Count Users by Dept or Birthyr report. The difference between these two reports is that subsequent report gives you additional sorting options. The same

differences also exist in other similar reports. For example, the List Users report differs from the List Users with Charges report where the latter report has additional selection criteria based on charge activity.



Exercises

1. Which report group would you select for finding information on current holds and charges/checkouts?
2. Find a report that could list titles belonging to a particular library.
3. Which report group would you select to import bibliographic records?

Working with Report Features

In this section, we will review the options available in the SirsiDynix Symphony Reports module.

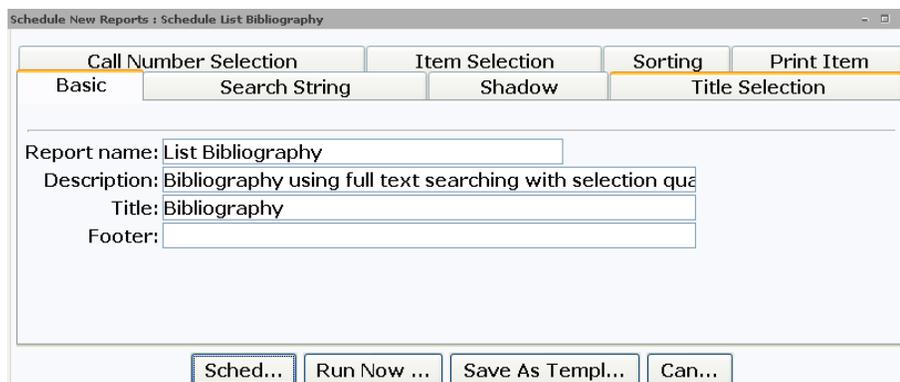
Upon completion of this section, you will be able to:

- Understand the different tabs available in reports.
- Schedule reports to run automatically.
- Print and email report output.
- Display report output.
- Remove finished reports.

Schedule New Report Wizard Tabs

The Basic Tab

Every report has the same **Basic** tab.



Screenshot of the "Schedule New Reports : Schedule List Bibliography" window. The window has a tabbed interface with four tabs: "Call Number Selection", "Item Selection", "Sorting", and "Print Item". The "Basic" tab is selected. Below the tabs are four sub-tabs: "Basic", "Search String", "Shadow", and "Title Selection". The "Basic" sub-tab is active. The main area contains the following fields:

- Report name: List Bibliography
- Description: Bibliography using full text searching with selection que
- Title: Bibliography
- Footer: (empty)

At the bottom of the window are four buttons: "Sched...", "Run Now ...", "Save As Templ...", and "Can...".

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 **Templates** 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.

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 is especially helpful to modify information in the **Basic** tab in a multi-library setting where staff members are running the same types of reports. Changing the name of a report will make 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. If no selections are made in the **Title Selection**, **Call Number Selection**, or **Item Selection** tabs, the report will 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.

Screenshot of the 'Schedule List Bibliography' report configuration window. The window has tabs for 'Basic', 'Search String', 'Style Sheet', 'Shadow', and 'Title Selection'. The 'Style Sheet' tab is active, showing various selection criteria for 'Item Selection'. A red callout box highlights the text: 'For context specific help on selections within a report, refer to the WorkFlows online Help'. At the bottom are buttons for 'Sched...', 'Run Now...', 'Save As Temp...', and 'Can...'.



It is not necessary to make selections in every available field on the tabs.

Sorting Tab

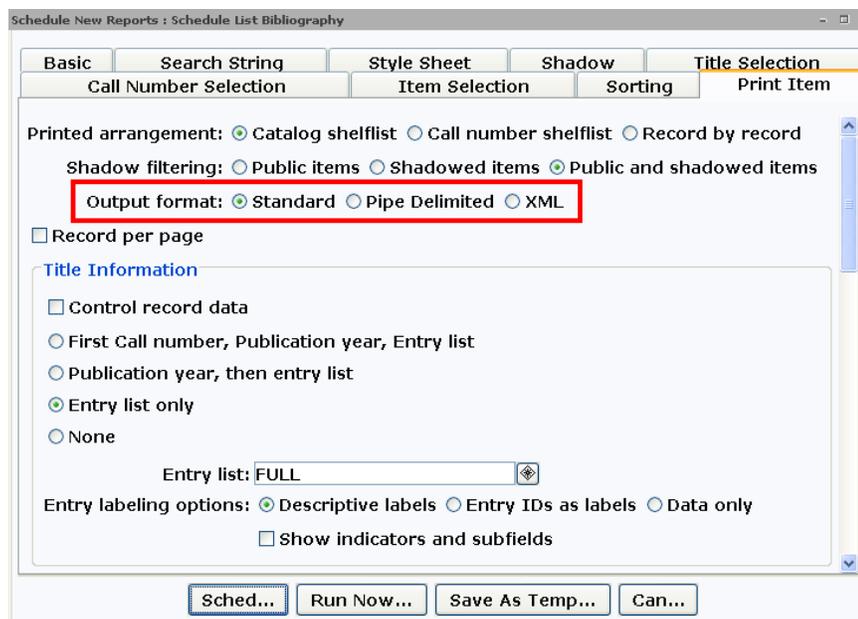
This option is available in some reports, particularly lists and notices, when it may be beneficial to have various options for sorting report results. To make sorting selections, you can use the Sorted By drop-down list. The Sorted By options vary by report.



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.

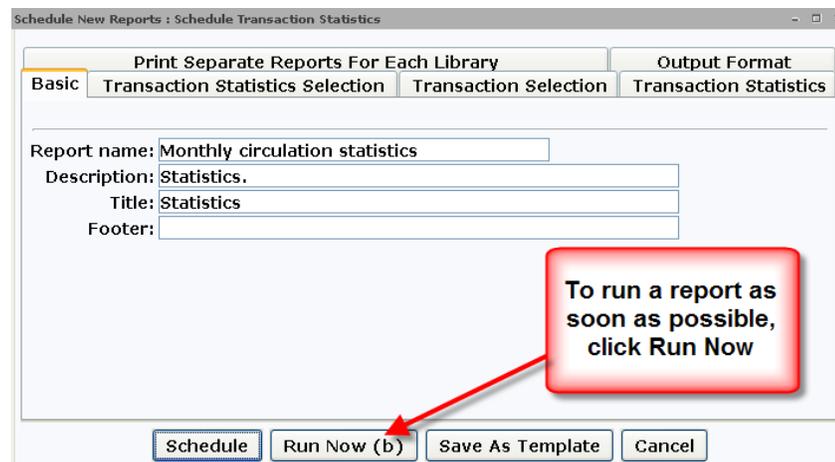


Scheduling Reports

Once you have selected a report and criteria, you can run the report immediately or schedule it to run at a future time.

To run a report immediately:

1. Click the *Schedule New Reports* wizard.  Schedule New Reports
2. Double-click the report you want to run or highlight it and click **Setup & Schedule**.
3. Click **Run Now**.



4. Click **Display Finished Reports** to view the results or click **Close** to exit the wizard.

To schedule a report for a later time and/or date:

1. Click the *Schedule New Reports* wizard.  Schedule New Reports
2. Double-click the report you want to run or highlight it and click **Setup & Schedule**.
3. Click **Schedule**.
4. Click one of the following options:
 - ASAP (As Soon As Possible) schedules the report to run immediately, and for one time only.
 - Once schedules the report to run only one time, on the selected day at the specified time. Use the calendar to select the day, and type or select the hour, minute, and AM or PM.

- Daily schedules the report to run each day, or every so many days. Use the calendar to select the starting day, and type or select the starting hour, minute, and AM or PM. Under Interval Days, type how many days are to pass before the report runs again.

Schedule

ASAP
 Once
 Daily
 Weekly
 Monthly

Start running on

← January 2011 →

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

8 : 00 AM

Interval Days

Every 1 days

- Weekly schedules the report to run one or more selected days of the week. For example, this selection is used for reports that run every Monday, or reports that run Monday through Friday but not on weekends. Use the calendar to select the starting day, and type or select the hour, minute, and AM or PM. Under Days of the Week, select the check box next to each day of the week on which the report is to run.

Schedule

ASAP
 Once
 Daily
 Weekly
 Monthly

Start running on

← January 2011 →

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

8 : 00 AM

Days of week

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

- Monthly schedules the report to run one or more selected days of the month. For example, this selection is used for reports that run on the 1st and 15th of the month. Use the calendar to select the starting day, and type or select the starting hour, minute, and AM or PM. Under Days of the Month, select the check box next to each day of the month on which the report is to run.

Schedule

ASAP
 Once
 Daily
 Weekly
 Monthly

Start running on

← February 2011 →

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

8 : 00 AM

Days of month

1
 2
 3
 4
 5
 6
 7
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 12
 13
 14
 15
 16
 17
 18
 19
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Printing and Distribution Options

There are printing and distribution options available when scheduling a report. In each report, you can indicate if the report results are to be printed and/or emailed to library staff when the report finishes running.

You can select the Send to Printer check box if you want to print the report on paper. If you select this option, use the drop down to identify the printer. Leave the Format check box selected. This option automatically sends report results to the printer for Unix and Linux servers. Windows servers do not have this feature.

Printing/Distribution

Send to printer
 Save to Finished Reports Wizard

Email to Individual(s)

 Format

Email Language: English

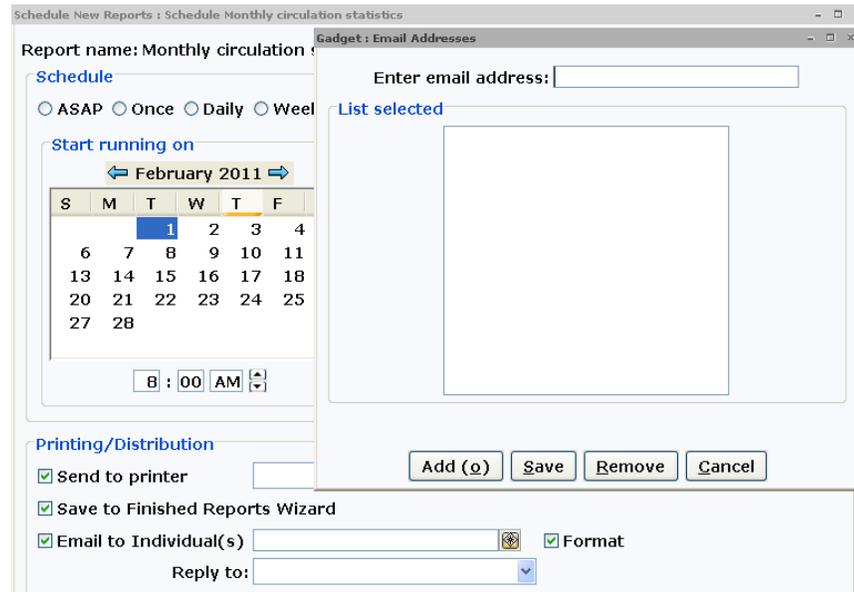
Auto email to recipients with email addresses in their patron record

Email Subject Line: Library Notice

Reply to:

Report output can be sent directly to an email address or a list of addresses. Use the *Email Addresses* gadget to enter the addresses. The Email to Individual(s) field has a limit of 256 characters, including separators between email addresses. If you are sending a notice type report, addresses entered into this field will receive the entire report, including all notices. Select the Format check box to format the report output in email using report headers, spacing, and page breaks. For

notice type reports, you must format the report to print the notice text message.



You also have the option to choose the language for emailed reports. If no language is selected, emails are sent in the system's default language.

For notice type reports and reports that allow separate notices to be mailed to individuals, the Auto Email to Recipients With Email Addresses in Their Patron Record check box is available. Select this check box to email individual notices to users with valid email addresses in their user record.

You can also enter your own subject in the Email Subject Line. If you choose to not use this field, the default "Library Notice" will be used.

Replace the "old" window at the bottom with this NEW version that shows the new feature of "Email Subject Line":

Printing/Distribution

Send to printer Format

Save to Finished Reports Wizard

Email to Individual(s) Format

 Email Language: English

Auto email to recipients with email addresses in their patron record

 Email Subject Line: Library Notice

 Reply to: ▼

(replace

this one below)

Printing/Distribution

Send to printer Format

Save to Finished Reports Wizard

Email to Individual(s) Format

Auto email to recipients with email addresses in their patron record

 Reply to: ▼

In the Reply To field, type or select email addresses. The Reply To field is used as the sender address as well as the reply to address. A Report Session property determines whether or not you can manually enter email addresses.



Direct printing is only available for a system printer (attached to the server) or a printer directly attached to the PC. If you are printing to a network printer, you will need to print the finished report. Direct printing is configured in the *Report* wizard under the Module Configuration group of wizards.

Displaying Finished Reports

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

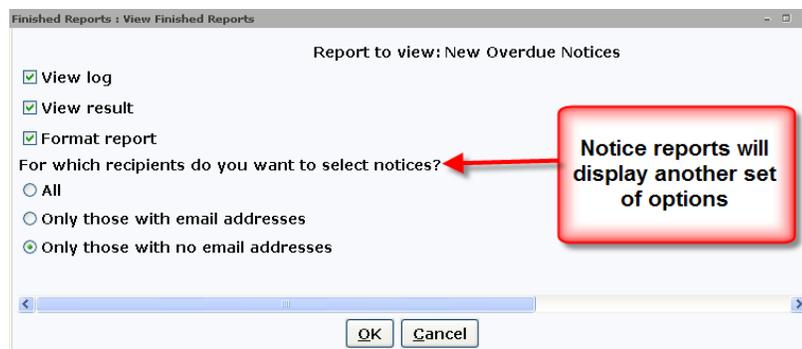
Users with staff level access can only view reports run by users with the same user access group, for example – users with a CIRC login can only view reports run by users with a CIRC login group. System administrators can see reports run by any user regardless of user access.

To display the output of a report:

1. Click the *Finished Reports* wizard.  Finished Reports



2. Find the report in the finished list and double-click on it. You can also highlight the report and click **View**.



3. Select of clear the options you want and click **OK**.



You may also print or email the finished report from the *Finished Reports* wizard.

Printing Finished Reports

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



Printing Options

PC Print. This automatically sends the report to your default printer.

System Print. This option, if selected, sends the report directly to SirsiDynix Symphony system printer that you select in the drop-down list. This option only displays if the Allow Direct Print check box is selected in the Report Module Configuration wizard. A confirmation dialog will display when you send a report to a system printer.

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. This 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.

Emailing Finished Reports

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



To email finished reports:

1. Click the *Email To* gadget.
2. Enter the email address and click **Add**.



3. When you have entered all of the recipient addresses, click **Save**.
4. Select the Format Report check box to use SirsiDynix Symphony-defined formatting specific to each report, such as report headers, spacing, and page breaks.

Unformatted reports will retain the code that would have been used to format the report, such as .folddata. Localized language labels, such as \$<recalled:U>, will also be displayed in unformatted data.

5. Click **OK**.
6. Click **OK**.



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 address in the user address of the user record.



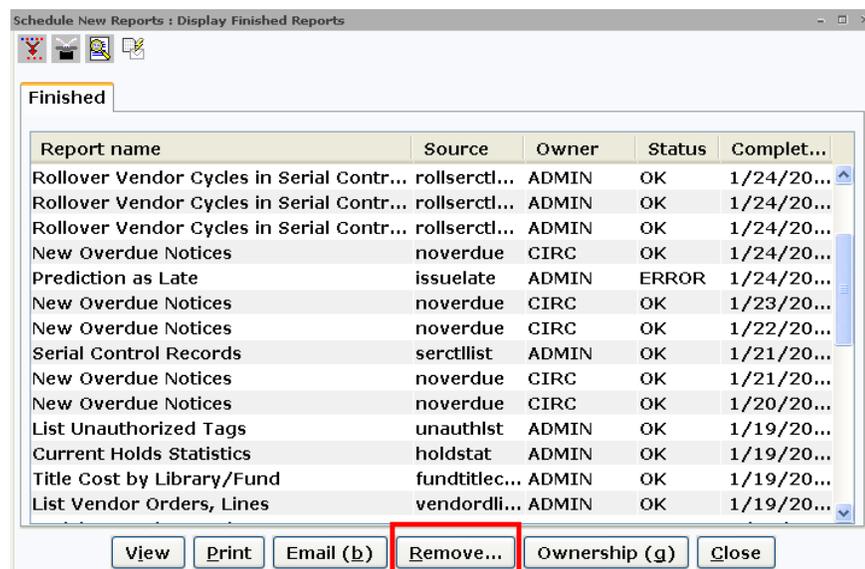
Removing Finished Reports

It is a good practice to remove finished reports that have already served their purpose in providing you the information you need. Depending on your library's workflow procedures, the system administrator may be the one to remove all finished reports. If so, you may want to save the WordPad version of the report results on your desktop.

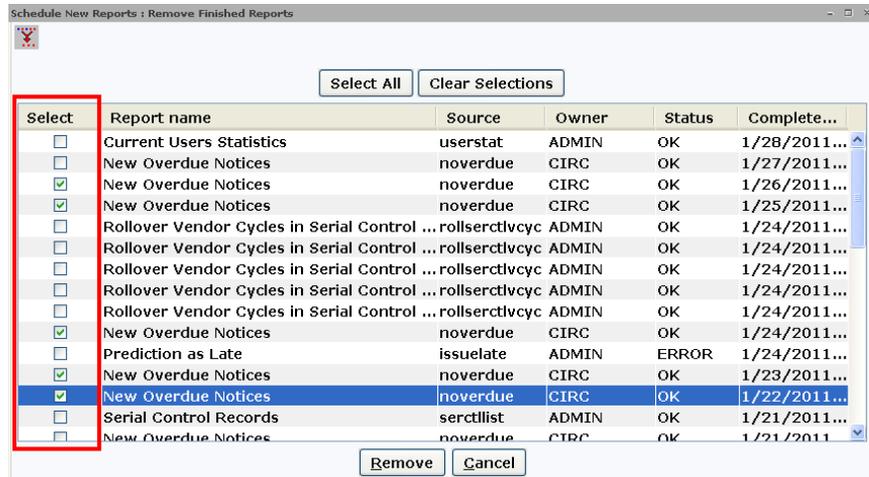
To remove finished reports:

1. Click the *Finished Reports* wizard.  Finished Reports
2. Click **Remove**.

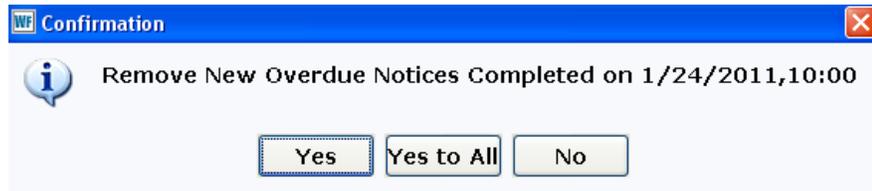
This will bring up a new window where you can select which report(s) you want to remove.



3. Select the report(s) you wish to remove by clicking the appropriate checkboxes.

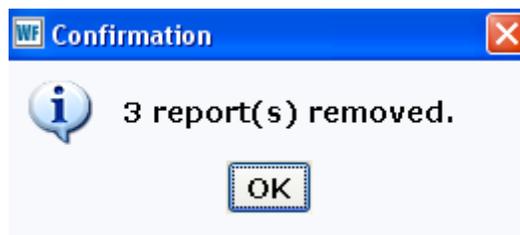


4. Click **Remove**.

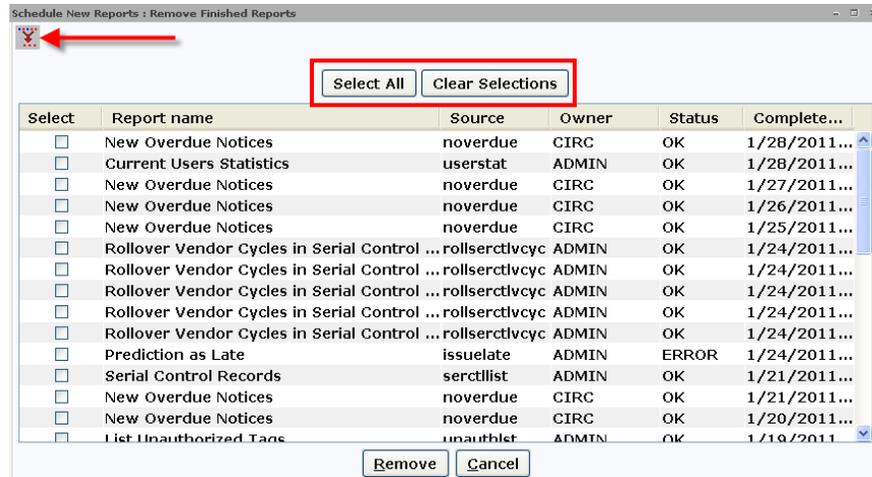


The Confirmation window enables you to review the reports to be removed before actually removing them.

5. Click **Yes** to remove each selected report one at a time. Click **Yes to All** to remove all selected reports. Another confirmation window will appear stating the total number of reports removed from the *Finished Reports* wizard.



You should note that there are also a couple options available for accelerating the removal of reports, as illustrated below:



The following points describe the use of the *Remove Finished Reports* options:

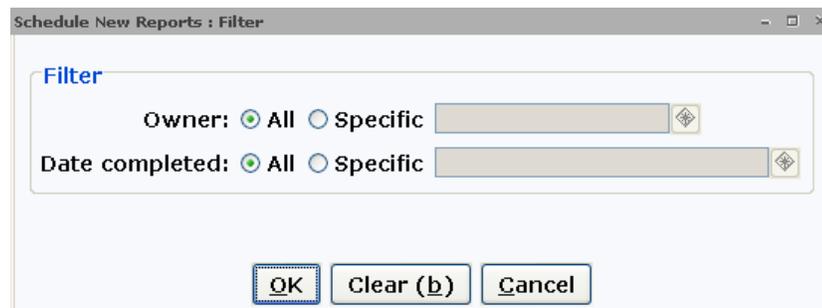
- Select All. This button selects every finished report in the list.



If you want to remove the majority of the reports in the *Finished Reports* wizard, click the **Select All** button, and then deselect the few reports you would like to keep.

The **Clear Selections** button enables you to remove all your selections.

- *Filter* helper. This helper limits the reports displayed in the *Finished Reports* wizard by selecting additional limiting criteria. For example, you could limit the finished reports by report owner or by date completed, using the Filter window shown below:



Count Reports

In this section, we introduce you to reports that will count various records. Here you will also learn how to interpret report logs.

Upon completion of this section, you will be able to:

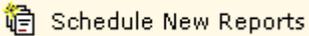
- Select an appropriate count report to meet some objective.
- Make proper selections to limit your results.
- View and interpret the finished report log.

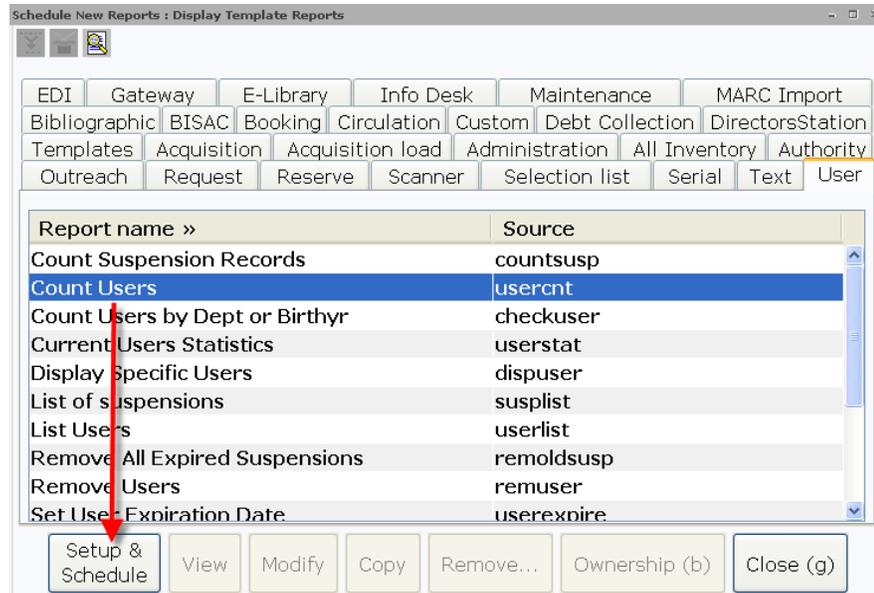
Remember that count reports answer the question, “How many records meet these criteria?” Examples of this type of report are Count Bills, Count Charges, and Count Items. You might run this type of report if you need a count of all the users in your library.

Running a Count Report

The first step to running a report is thinking about the information you need. Let us say you are asked for a count of all patrons in your library that have a Juvenile profile associated with their user record. To find this information, follow the steps outlined below.

Selecting the Report

1. From the **Reports** module select the *Schedule New Reports* wizard.
 A screenshot of a software interface showing a button labeled "Schedule New Reports" with a small icon of a document and a checkmark.
2. Select the appropriate report group. In this scenario, double-click on the Count Users report or highlight it and click **Setup & Schedule**.

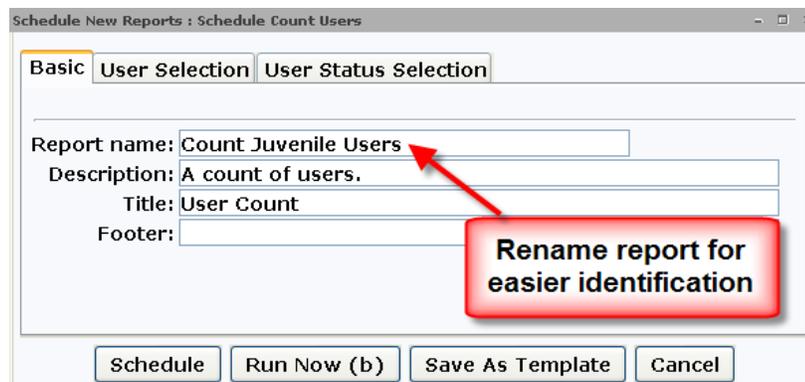


Choosing Criteria

Most reports will produce all records in a database with respect to the fundamental design of the report unless specific criteria are entered. For example, if we run the Count Users report without any selections, the report results will include a count of all users in the system. Therefore, you may need to make selections that will produce the results you seek.

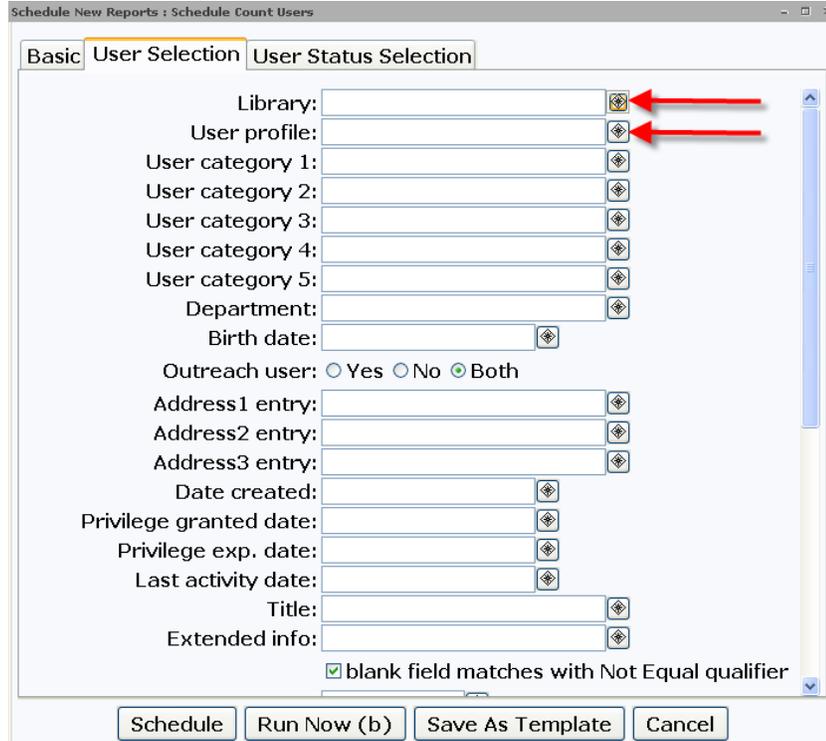
To choose report criteria:

1. Enter an appropriate name into the Report Name field on the **Basic** tab based on the purpose of the report:

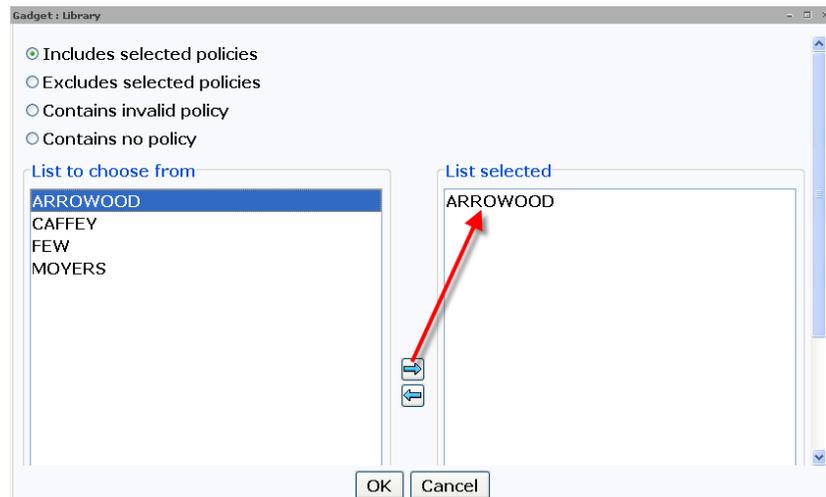


Report name should remind you of the selections made in the report and will distinguish your report from other reports on the finished reports list. The information you enter into the Description, Title and Footer fields will appear within the report results.

2. Click the **User Selection** tab.
3. Click the gadgets next to the fields that provide the selections you want:



4. To limit by library, click the *Library* gadget. This field will not appear for single library sites.
5. Click the right-facing arrow to place the selected policy into the List Selected column.

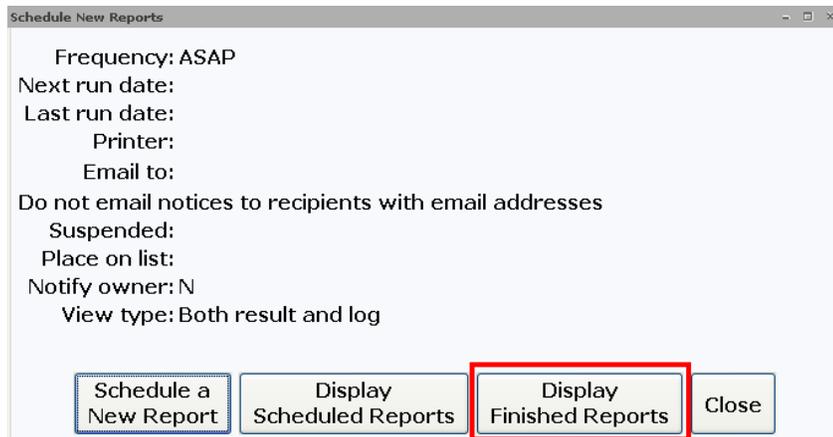


6. Click **OK**.



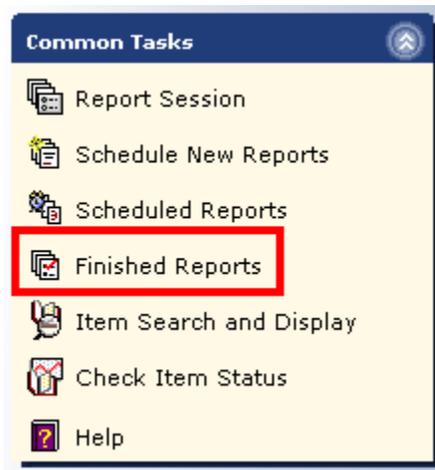
You can also select a value from the list by double-clicking on the value rather than clicking the right-facing arrow.

7. After entering all appropriate criteria for the report, click **Run Now**.
8. Once the confirmation window appears, click **Display Finished Reports** to view the report you just ran.



Viewing Finished Reports

Use the *Finished Reports* wizard in the Reports module to view finished reports.

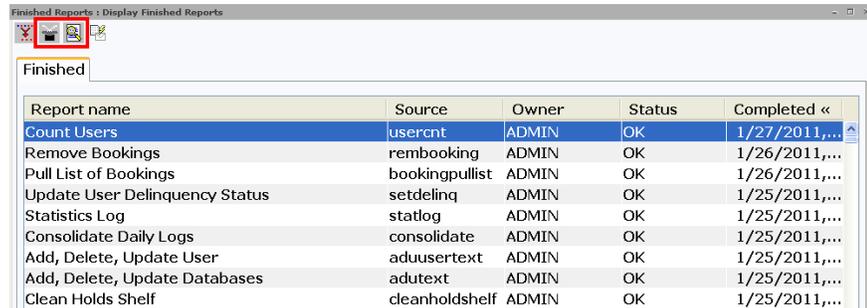


To display the finished report:

1. Double-click the report you just ran or highlight it and click **View**.



If your report isn't on the finished list yet, use the *Refresh Report List* helper (the “rabbit in the hat”) to update the finished list. You can also use the *Display Report Scheduler Status* helper (the “magnifying glass”) to see which report is running currently.



Report name	Source	Owner	Status	Completed <<
Count Users	usercnt	ADMIN	OK	1/27/2011,...
Remove Bookings	rembooking	ADMIN	OK	1/26/2011,...
Pull List of Bookings	bookingpullist	ADMIN	OK	1/26/2011,...
Update User Delinquency Status	setdelinq	ADMIN	OK	1/25/2011,...
Statistics Log	statlog	ADMIN	OK	1/25/2011,...
Consolidate Daily Logs	consolidate	ADMIN	OK	1/25/2011,...
Add, Delete, Update User	aduusertext	ADMIN	OK	1/25/2011,...
Add, Delete, Update Databases	adutext	ADMIN	OK	1/25/2011,...
Clean Holds Shelf	cleanholdshelf	ADMIN	OK	1/25/2011,...

2. Click **View**.



You can also view a report by double clicking on the report name as an alternative to selecting the report and then clicking View.

3. Click **OK**.



For count reports, be sure that the Log checkbox is selected. The results of a count report are embedded within the log.

Interpreting Report Logs

The system displays the report log and results in another application such as Notepad.



For more information about configuring the default application in which to display the report log and results, see [Configuring Session Settings](#) in this training guide.

The following graphic illustrates the typical display of a report log:

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

Symphony user selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
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 ARROWOOD.
Users will be selected if user Profile is JUVENILE.
194 user record(s) considered.
5 user record(s) selected.
Symphony user selection finished on Wednesday, January 19, 2011, 9:28 AM
Symphony userstatus selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
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
5 userstatus record(s) considered.
5 userstatus record(s) selected.
Symphony userstatus selection finished on Wednesday, January 19, 2011, 9:28 AM
```

From this report log, you can determine the number of juvenile users associated with the Arrowood library is five. Let us take a closer look at how we know five to be the correct answer.

The log displays the results for each selection criteria tab in the report. For example, in the Count Users report, there are two criteria tabs: the **User Selection** tab, and the **User Status** tab. Each criteria tab is executed and the results are passed to the next criteria tab for further analysis. The report log below shows that, first the report analyses the user selection and presents the results in sequential order, thus: it shows users in Arrowood library as 194; out of which 5 users belong to the profile of Juvenile. Next, it submits the 5 juvenile records to the next criteria tab - **User Status**. Since there is no criteria to process in user status, the result that shows remain 5 users. The last figure is usually the final result of a report.



In the finished report log below you can see the start and end times that were noted when the system used the selected criteria on the **User Selection** tab to produce the appropriate count of users:

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

Symphony user selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM

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 ARROWOOD.
Users will be selected if user Profile is JUVENILE.
194 user record(s) considered.
5 user record(s) selected.

Symphony user selection finished on Wednesday, January 19, 2011, 9:28 AM

Symphony userstatus selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
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
5 userstatus record(s) considered.
5 userstatus record(s) selected.
Symphony userstatus selection finished on Wednesday, January 19, 2011, 9:28 AM
```



With an even closer look, you can see that the following fields indicate our selection criteria:

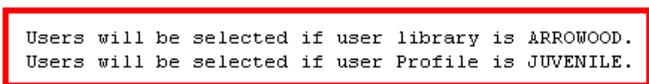
```
Report Log for User Count
Report usercnt scheduled as Count of Juvenile Users
A count of users.

Symphony user selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
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 ARROWOOD.
Users will be selected if user Profile is JUVENILE.

194 user record(s) considered.
5 user record(s) selected.

Symphony user selection finished on Wednesday, January 19, 2011, 9:28 AM
Symphony userstatus selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
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
5 userstatus record(s) considered.
5 userstatus record(s) selected.
Symphony userstatus selection finished on Wednesday, January 19, 2011, 9:28 AM
```



The system then outputs the total number of users in the system:

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

Symphony user selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
  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 ARROWOOD.
  Users will be selected if user Profile is JUVENILE.

194 user record(s) considered.
 5 user record(s) selected.

Symphony user selection finished on Wednesday, January 19, 2011, 9:28 AM
Symphony userstatus selection 3.4 started on Wednesday, January 19, 2011, 9:28
AM
  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
  5 userstatus record(s) considered.
  5 userstatus record(s) selected.
Symphony userstatus selection finished on Wednesday, January 19, 2011, 9:28 AM
```

And then it renders the actual number of users who met our selected criteria:

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

Symphony user selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
  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 ARROWOOD.
  Users will be selected if user Profile is JUVENILE.

194 user record(s) considered.
 5 user record(s) selected.

Symphony user selection finished on Wednesday, January 19, 2011, 9:28 AM
Symphony userstatus selection 3.4 started on Wednesday, January 19, 2011, 9:28
AM
  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
  5 userstatus record(s) considered.
  5 userstatus record(s) selected.
Symphony userstatus selection finished on Wednesday, January 19, 2011, 9:28 AM
```



You may also see additional numbers listed among the results of the report. This number refers to the amount of users from the result above that are also associated with a particular user status (BLOCKED, BARRED, etc.). If we had made selections on a particular user status, we would find the final number at the bottom of the log.

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

Symphony user selection 3.4 started on Wednesday, January 19, 2011, 9:28 AM
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 ARROWOOD.
Users will be selected if user Profile is JUVENILE.

194 user record(s) considered.
5 user record(s) selected.

Symphony user selection finished on Wednesday, January 19, 2011, 9:28 AM
Symphony userstatus selection 3.4 started on Wednesday, January 19, 2011, 9:28
AM
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
5 userstatus record(s) considered.
5 userstatus record(s) selected.
Symphony userstatus selection finished on Wednesday, January 19, 2011, 9:28 AM
```

Since we were not concerned with user status, five is our final number.



Exercises

1. You may choose any of your library defined user profiles for this report.
2. Produce a count of all items associated with an item type of BOOK.
3. Produce a count of all users who do not have a user status of OK.
Hint: Focus on the radio buttons of the Delinquency Status gadget.

List Reports

In this section, you will learn about list reports.

Upon completion of this section, you will be able to:

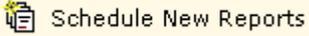
- Select an appropriate list report for your desired report objective.
- Make proper selections to limit your results.
- Use print options to output the right amount of information.
- Save reports as templates.

List reports output a list of records that meet selection criteria. Examples of this type of report are List Bills, List Charges, and List Items. You might run the List Users report to generate a list of users who are barred from checking out material

Running a List Report

The first step in setting up and running a correct report is thinking about the information you need. For example, let us say you are asked to produce a list of all items created last week, regardless of which library owns them.

To run a list report:

1. From the Reports module, select the *Schedule New Reports* wizard.

2. Click the **Bibliographic** tab.
3. Double-click the List Item report or highlight it and click **Setup & Schedule**.

Choosing Criteria

You will need to make specific selections from within the report.



Depending on the list report you run (e.g., List Items report), it may take the system an extremely long time to post the results if you choose not to “filter” the report by making selections in the various fields. In other words, when you don’t make any selections, a list of ALL records in the associated databases will be outputted. The PC which you are running the report from may not have enough resources to display entire bibliographic records from the system.

To choose report criteria:

1. If necessary, enter an appropriate name into the Report Name field on the **Basic** tab.

Screenshot of the "Schedule New Reports : Schedule List Items" dialog box. The "Basic" tab is selected. The "Report name" field contains "List Items", "Description" contains "A shelflist form printout of items.", "Title" contains "Item List", and "Footer" is empty. Buttons at the bottom include "Schedule", "Run Now (b)", "Save As Template", and "Cancel".



The report name should remind you of the selections made in the report and will distinguish your report from other finished reports. The information entered into the Description, Title and Footer fields will appear within the report results.

2. Click the **Item Selection** tab.
3. Click on an appropriate gadget; in this example, click on the *Date Created* gadget.



Schedule New Reports : Schedule List Items
 Basic | Style Sheet | **Item Selection** | Sorting | Print Item
 Library: [] [Gadget]
 Home location: [] [Gadget]
 Current location: [] [Gadget]
 Item type: [] [Gadget]
 Item category 1: [] [Gadget]
 Item category 2: [] [Gadget]
 Permanent: Yes No Both
 Circulate: Yes No Both
 Extended info: [] [Gadget]
 blank field matches with Not Equal qualifier
 In the shadow catalog: Yes No Both
 Accountable: Yes No Both
 Number of pieces: [] [Gadget]
 Date created: [] [Gadget] ←
 Last activity date: [] [Gadget]
 Distribution key: [] [Gadget]
 Date last charged: [] [Gadget]
 Schedule | Run Now (b) | Save As Template | Cancel

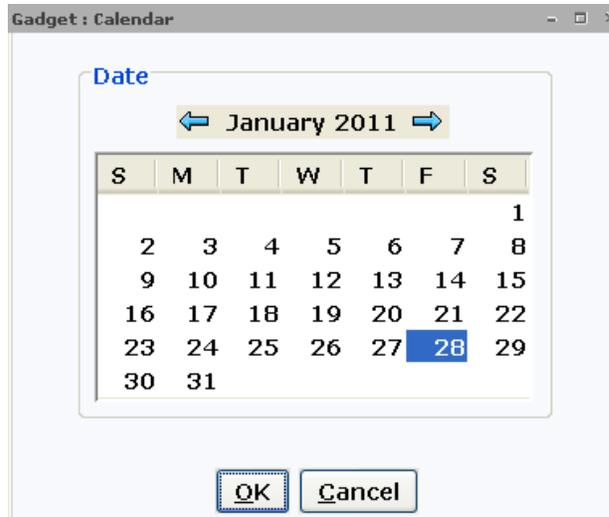
4. Once the new gadget window displays, click the **Range** button to create the fields that allow you to enter a range of dates.
5. Then, click the gadget next to the first of the two date fields to bring up a calendar.

Gadget : Date Range
 On | Before | After
 ← Range | No date | Any
 Use data for this period [] thru []
 OK | Cancel



You can also type date into the date field using the correct system date format. Using the gadget ensures that you enter the date according to the date format the system recognizes.

6. Select a start date from the calendar.



The blue arrows placed before and after the month/year allow you to select a different calendar month.

7. Click **OK**.
8. Click the gadget next to the second of the two date fields to bring up another calendar to select the end date.
9. Click **OK**.



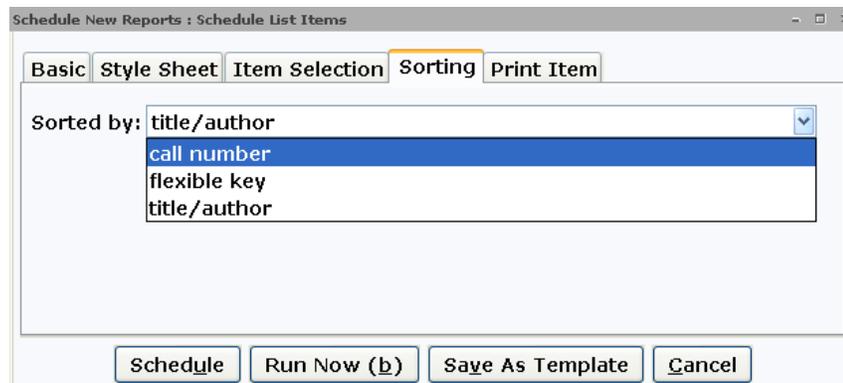
10. Once the system returns you to the Date Range window, click **OK** again.

Sorting Options

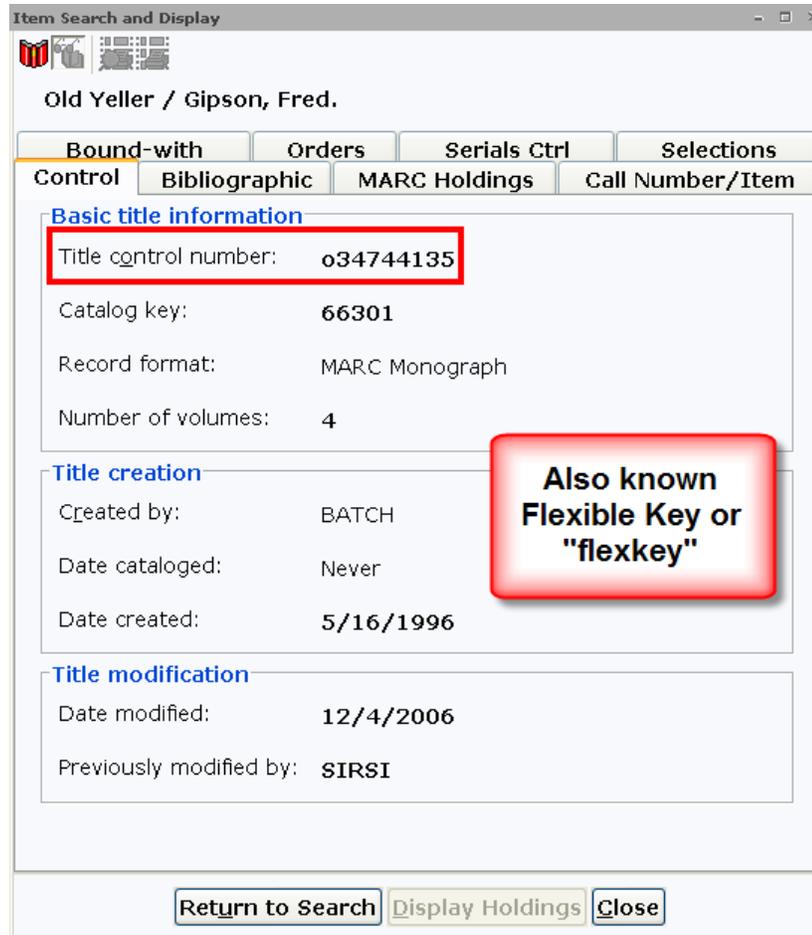
Most list reports include a sort option.

To sort a list report:

1. From within the List report, select the **Sorting** tab.
2. Click on the drop down and select the preferred sorting option from the list.



In the List Items report, the system allows you to sort the report results by: 1) Title and associated author (alphabetically); 2) Call number; 3) Flexible key. Flexible key refers to the Title Control Number found for each bibliographic record in the system; e.g., o48242445 for an OCLC based title control number, i9780782141306 for an ISBN based title control number, a91910 for a system generated number.

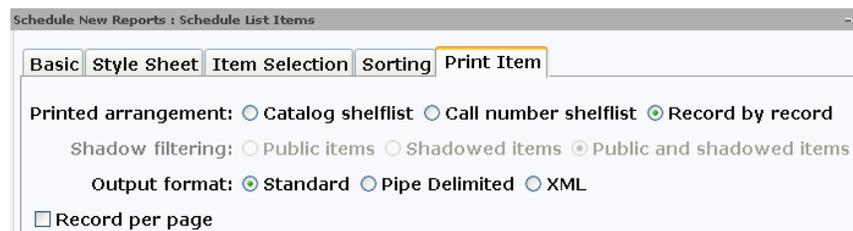


Printing Options

Once you have selected criteria and a sort option, it is time to consider the information you want to display in the report.

From within the list report:

1. Select the **Print** tab; in this case, the **Print Item** tab.
2. Select from the Printed Arrangement options as illustrated below:



The following points describe the Printed Arrangement options:

- **Catalog Shelflist.** This option prints a single bibliographic record and lists all call numbers and copies attached to the selected title. Each title's call numbers are printed in order by library and shelving key.
- **Call Number Shelflist.** This option prints a bibliographic record for each call number, and lists all copies attached to the selected title and call number.
- **Record by Record.** This option prints a bibliographic record for each copy or Item ID selected. In a Record by Record list, it is not possible to also use the Shadow Filtering options.
- **Public Items.** This option becomes available after you have selected either Catalog Shelflist or Call Number Shelflist, and limits the results to items that are only viewable in e-Library.
- **Shadowed Items.** This option becomes available after you have selected either Catalog Shelflist or Call Number Shelflist, and limits the results to items that are only viewable in WorkFlows.
- **Public and Shadowed Items.** This option becomes available after you have selected either Catalog Shelflist or Call Number Shelflist, and provides a list of items that are viewable in both e-Library and in WorkFlows.
- **Generate Pipe Delimited Output.** This option allows the system to generate the results into a spreadsheet application, such as Microsoft Excel.
- **XML Output.** With this option, the report data is saved in a visually enhanced text format (eXtensible Markup Language). The data can then be exported to a third-party application, such as a spreadsheet application



For more information, see [Generating Pipe Delimited Output in this training guide](#).

3. Select from the options in the Title Information section based on the type and amount of bibliographic information you want to display in the report results as illustrated below:

Title Information

Control record data

First Call number, Publication year, Entry list

Publication year, then entry list

Entry list only

None

Entry list: 

Entry labeling options: Descriptive labels Entry IDs as labels Data only

Show indicators and subfields

The following points describe the options available in the Title Information section of this tab:

- **Control Record Data.** This option displays the information stored in the Control tab of the bibliographic record in SirsiDynix Symphony WorkFlows, including the title control number (i.e., bib number), the record format, the date the bibliographic record was created creation, and the date bibliographic record was cataloged.
- **First Call Number, Publication Year, Entry List.** This option displays the following information in the order mentioned: 1) the associated call number; 2) the publication year of the title; and 3) all of the fields of the bibliographic record as recorded in the Entry List field just below.
- **Publication Year, then Entry List** (defaulted option). This option displays the following information in the order mentioned: 1) the publication year of the title; and 2) all of the fields of the bibliographic record as recorded in the Entry List field just below.
- **Entry List Only.** This option prints only the entries specified in the Entry List. If there is no value in the Entry List box, complete catalog information prints.
- **None.** This option does not display any bibliographic information from the title record.
- **Entry List.** This box regulates which bibliographic information displays in your report. Any time this field contains data, the Entry List reflects the bibliographic information that is printed. Use the Entry ID gadget to select a specific entry ID list. You have the option to print the fields as they display in the ALL, FULL, BRIEF, and TEMPLATE entry lists your library has defined for each of the record formats, such as SERIAL or MARC.

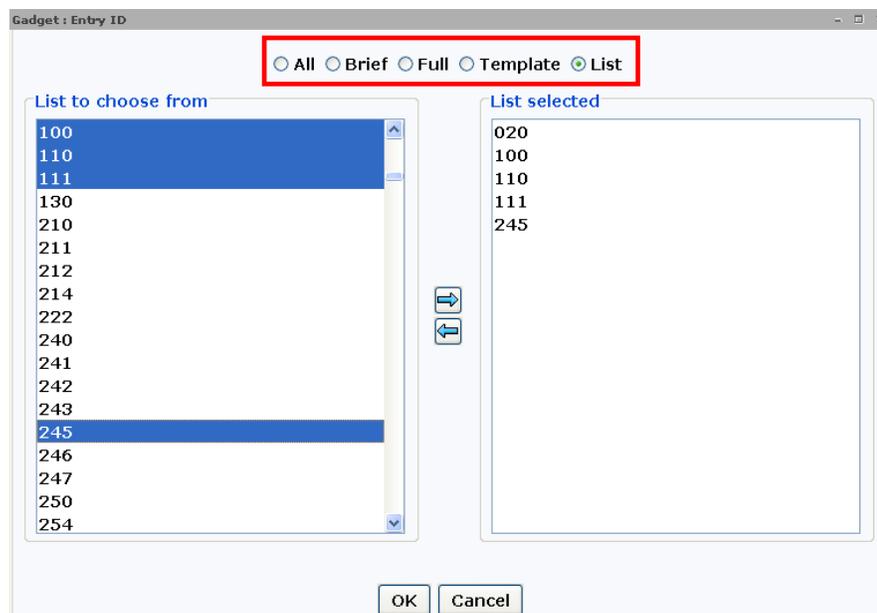
All prints the most complete entry list. This option prints all of the tags, or entry IDs, originally found in the record that was loaded or created.

Brief prints the brief entry list, which contains more concise bibliographic information.

Full prints extensive bibliographic information in the entry list. This option is selected by default.

Template prints the entries that display for completion when a new record is created.

List allows you to list specific entry IDs, separated by a comma, to pinpoint exactly the fields you wish to display. If you only need the title to display, select the 245 entry ID that is based on the MARC tag for the title field. If you select specific entry IDs, they will display in the report in the order in which you select them.



You can set the Entry List by clicking the appropriate gadget or you can simply enter the actual field entries right into the Entry List field, separating each entry with a comma and no space. Furthermore, you can determine the order that the fields display in report results by the order in which you enter the field entries

If you would like to print just the title of each record, select the Entry List Only option and replace “Full” with “245” in the Entry List field.

- **Descriptive Labels** (defaulted option). This option displays the field entry name in the report results rather than the tag number. For example, the author of a title would be identified in the report results by “author” rather than by “100”.



- **Entry IDs as Labels.** This option displays the tag number in the report results rather than the field entry name. For example, the author of a title would be identified in the report results by “100” rather than by “author”.
- **Data Only.** This option simply displays the data from the report and is not identified by either field entry name or by tag number.
- **Show Indicators and Subfields.** This option displays the information located in the indicator fields and subfields for the various fields (tags) of the MARC record rather than limiting the results to just the data associated with the typical |a subfield.



Choosing to show indicators and subfields can pose a problem if you are also generating the output in pipe delimited format. Since subfields are already separated by pipe delimiters in the MARC record, every subfield would maintain its information in a separate cell of the spreadsheet. For some titles, the author field may only have one subfield; for others, it may contain several subfields. Therefore, the information for the |a subfield for all titles in the list will not always remain in the same column in the spreadsheet.

4. Select from the options in the Call Number Information section based on the amount and type of information you want to display on call numbers as illustrated below:

Call Number Information

All call number information

Call number only

No call number information

Call number bound-with links

The following points describe the options available in the Call Number Information section:

- **All Call Number Information.** This option includes the call number, the item library, the number of holds at the call number level, the number of copies attached to the particular call number, and the number of copies on academic reserve in the report output.
- **Call Number Only.** This option displays the call number only in the report output..
- **No Call Number Information** (default option). This option suppresses the printing of any call number information in the report output.

- **Call Number Bound-with Links.** This option prints information about records that have been bound under a single title in the report output.
5. Select from the options in the Item Information section based on the amount and type of copy related and circulation and inventory information to display in the report results as illustrated below:

Item Information

- All copy information
- Brief copy information
- Abbreviated copy and circulation information
- No copy information
- Circulation summary
- Bills
- Charges
- Holds
- Copy comments
- Inventory information

The following points describe the various options available to you in the Item Information section of this tab:

- **All Copy Information.** Prints item information, including copy number, item ID, item library, price as listed in the item record, item categories one and two (these may have more descriptive labels in your library), home and current locations, date the item was created, Item Type and whether the item is permanent.
- **Brief Copy Information.** Prints the most item information available. This option prints the copy number, item ID, the item library, and the item's current location.
- **Abbreviated Copy and Circulation Information.** Prints brief item and circulation information in a concise table format. In a single library system or a multi-library system, selecting this option will print the abbreviated copy and circulation information includes the copy number, the item ID, the item type, the home location, the price as listed in the item record, the date the item was created, and the number of times the item has been circulated in the report output.
- **No Copy Information.** This option suppresses the printing of any item information in the report output.
- **Circulation Summary.** This option includes the number of total charges, number of current charges, number of outstanding bills,

number of holds, number of in-house charges (indicating the item had been "used"), circulate flag which indicates whether the item can be charged (Y/N) and last used, which indicates when the item was last used or charged.

- **Bills.** This option prints all of the item's current bills, both paid and unpaid, in the report output. The Bills lists the number of bills not yet paid in full. For each bill, user ID, user name, amount, the bill reason, remaining balance and the library that sent the bill appears in the report output.
 - **Charges.** This option prints all of the item's current charges, with the first field reflecting the number of current charges (usually zero for not charged, or one for charged, unless the item has recirculated or the circulation override has been used). For each charge, user ID and user name, dates charged, due, renewed, and recalled, number of renewals, number of overdue and recall notices, current location, and the library that holds the item are displayed.
 - **Holds.** This option prints all of the item's current holds in the report output, with the first field reflecting the number of current holds. For each hold, user ID and user name, user's hold priority, date hold was placed, date hold expires and/or is no longer needed by the user, date that the user was last notified for pickup, number of pickup notices sent, any hold comment, whether the hold is a reserve item, if the item on hold is available, and whether it is a call number, copy, title, or system level hold are displayed. The library that holds the item as well as the library where the item will be picked up displays. The pickup library is defined by the staff or user who places the hold. If a pickup library is not defined, the pickup library defaults to the library where the user is registered.
 - **Copy Comments.** This option prints all the Comments entry IDs in the Extended Information section of the item's bibliographic record in the report output.
 - **Inventory Information.** This option lists the number of times the item was inventoried and the last date of inventory in the report output.
6. You can choose whether to print one record per page. This may be advisable for records that are printed with a full entry ID list. A record includes all information output for each bibliographic description printed.

Record per page

7. Finally, select the appropriate option to display MARC Holdings Information for serial records, as illustrated below:

MARC Holdings Information

No MARC Holdings

Formatted MARC Holdings

Unformatted MARC Holdings with descriptive labels

Unformatted MARC Holdings with Entry IDs

Unformatted MARC Holdings without tags

MARC Holdings entry list: FULL

Library:

Locations:

Restrict MARC Holdings by item library

- **No MARC Holdings.** This option to suppress MARC holdings information in the report output. This option is selected by default.
- **Formatted MARC Holdings.** This selection outputs a textual description of the MARC holdings information.
- **Unformatted MARC Holdings with Descriptive Labels.** This outputs the MARC holdings entry data with descriptive labels for these entries.
- **Unformatted MARC Holdings with Entry IDs.** This selection outputs the MARC holdings entry data along with the entry IDs for these entries.
- **Unformatted MARC Holding without Tags.** This outputs the MARC holdings entry data without the entry IDs or labels.
- **MARC Holdings Entry List.** The Entry List selection is only available if you selected one of the unformatted MARC holdings options. This selection controls what MARC Holdings entry information displays in your report. Use the Entry ID gadget to select a specific entry ID list. You also have the option to print the fields as they display in the ALL, FULL, BRIEF, and TEMPLATE entry lists of the MARC Holdings format.

All prints the most complete entry list. This option prints all of the tags, or entry IDs, originally found in the record that was loaded or created.

Brief prints the brief entry list, which contains more concise bibliographic information.

Full prints extensive bibliographic information in the entry list. This option is selected by default.

Template prints the entries that display for completion when a new record is created.

List allows you to list specific entry IDs, separated by a comma, to pinpoint exactly the fields you wish to display. If you only need the title to display, select the 245 entry ID that is based on the MARC tag for the title field.

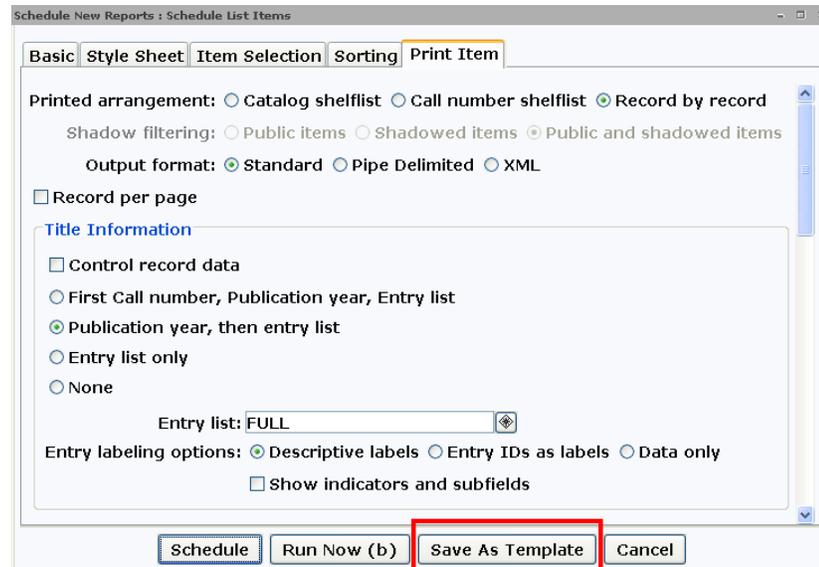
- **Library.** This selection allows you to limit the MARC holdings output by a library or specific libraries.
- **Locations.** This allows you to limit the MARC holdings output by a location or locations.
- **Restrict MARC Holdings by Item Library.** Select this check box to restrict the MARC holdings output to the item library (or owning library) of these items only. This list is restricted by the libraries previously selected in the Library field. This prompt is only available in those reports which do not include bibliographic selections.

Saving a Report Template

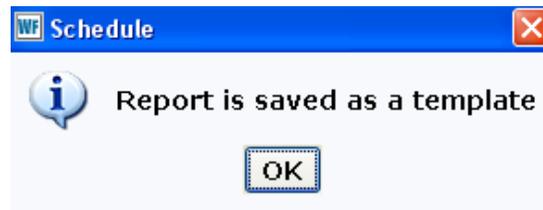
A template report is a SirsiDynix-delivered report that has been modified and/or saved to the **Templates** tab by members of your library staff.

To save a report as a template:

1. Once you have made your selections in the current report, click **Save As Template**.



2. Click OK.



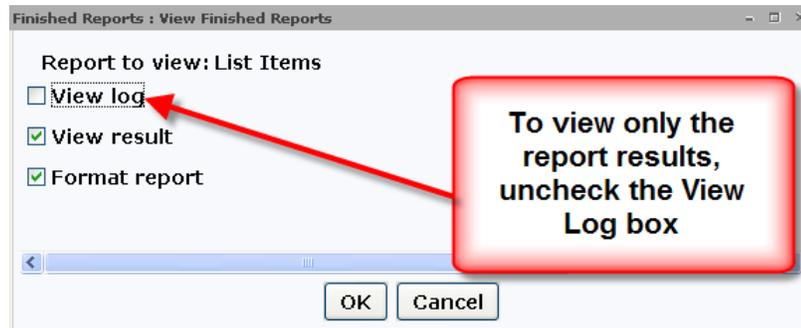
Running a Report Template

You can run template reports immediately or you can select when and how often a report runs. 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.

To run a report saved as a template:

1. From the **Templates** tab, double-click the report or highlight it and click **Setup & Schedule**.
2. Click **Run Now**.
3. If you only want to view the results, uncheck the View Log check box.



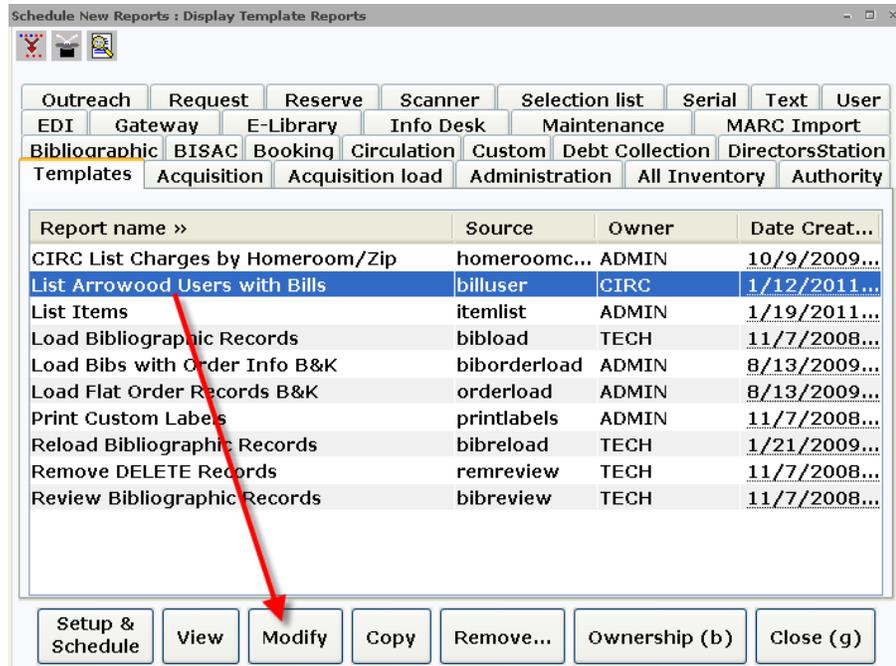
Follow the steps outlined in the [Viewing Finished Reports](#) section of this training guide to view the results from your template report.

Modifying a Template

You can modify template reports indefinitely if criteria change over time. For example, you may need remove previously selected criteria, add new criteria or modify the output of the report.

To modify a template:

1. Click the *Schedule New Reports* wizard.  Schedule New Reports
2. Within the **Template** tab, highlight the template you want to change and click **Modify**.



3. Make the appropriate changes.
4. Click OK.

Viewing Report Results in a Spreadsheet Application

Sometimes you may want to view a report's results in a spreadsheet application, like Microsoft Excel, to manipulate the format of the data more easily than in a word editor application like WordPad. You can accomplish this objective by generating pipe delimited output.

Generating output using a pipe delimited format assumes that you have selected the Generate Pipe Delimited Output button on the **Print Item** tab of the report before running the report, as illustrated below:



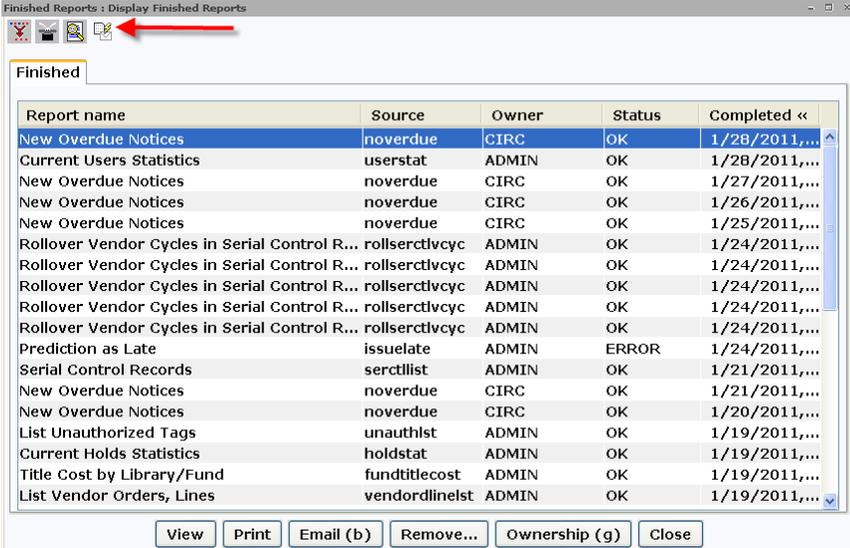
Once the report appears in the finished reports, viewing the report results in a spreadsheet application is carried out in two steps: 1) Open and save the finished report results using the Fixed Format Manager helper, and 2) open the saved file using a spreadsheet application.



This training guide will use Microsoft Excel as the spreadsheet application to illustrate.

To open and save the finished report using the Fixed Format Manager helper:

1. Click the *Finished Reports* wizard.  Finished Reports
2. Click the *Fixed Format Manager* helper. 



Finished Reports : Display Finished Reports

Finished

Report name	Source	Owner	Status	Completed <<
New Overdue Notices	noverdue	CIRC	OK	1/28/2011,...
Current Users Statistics	userstat	ADMIN	OK	1/28/2011,...
New Overdue Notices	noverdue	CIRC	OK	1/27/2011,...
New Overdue Notices	noverdue	CIRC	OK	1/26/2011,...
New Overdue Notices	noverdue	CIRC	OK	1/25/2011,...
Rollover Vendor Cycles in Serial Control R...	rollserctvcyc	ADMIN	OK	1/24/2011,...
Rollover Vendor Cycles in Serial Control R...	rollserctvcyc	ADMIN	OK	1/24/2011,...
Rollover Vendor Cycles in Serial Control R...	rollserctvcyc	ADMIN	OK	1/24/2011,...
Rollover Vendor Cycles in Serial Control R...	rollserctvcyc	ADMIN	OK	1/24/2011,...
Prediction as Late	issuelate	ADMIN	ERROR	1/24/2011,...
Serial Control Records	serctlst	ADMIN	OK	1/21/2011,...
New Overdue Notices	noverdue	CIRC	OK	1/21/2011,...
New Overdue Notices	noverdue	CIRC	OK	1/20/2011,...
List Unauthorized Tags	unauthlst	ADMIN	OK	1/19/2011,...
Current Holds Statistics	holdstat	ADMIN	OK	1/19/2011,...
Title Cost by Library/Fund	fundtitlecost	ADMIN	OK	1/19/2011,...
List Vendor Orders, Lines	vendordinelst	ADMIN	OK	1/19/2011,...

View Print Email (b) Remove... Ownership (g) Close

3. When a new window appears, select the appropriate file name where it is listed on the left side of the screen by year-month-day (e.g., 20100601) and by date and time on the right side (e.g., 6/1/2010, 15:05).
4. Click **View**.

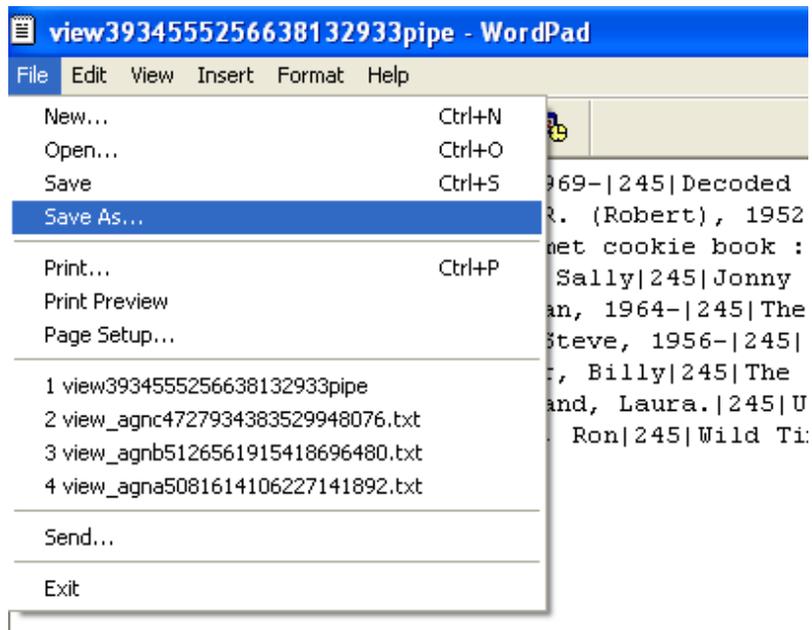


Finished Reports : Fixed Format Manager

Filename	Date Created <<
20110119_agnc.pipe	1/19/2011,9:58
20080211_afnl.pipe	2/11/2008,7:42
20080208_afmd.pipe	2/8/2008,15:05
20080208_afmc.pipe	2/8/2008,10:34
20080208_afmb.pipe	2/8/2008,10:33
20080208_afma.pipe	2/8/2008,10:32
20080208_aflz.pipe	2/8/2008,10:27
20080208_afly.pipe	2/8/2008,10:26
20080208_aflx.pipe	2/8/2008,10:25
20080207_aflk.pipe	2/7/2008,14:14

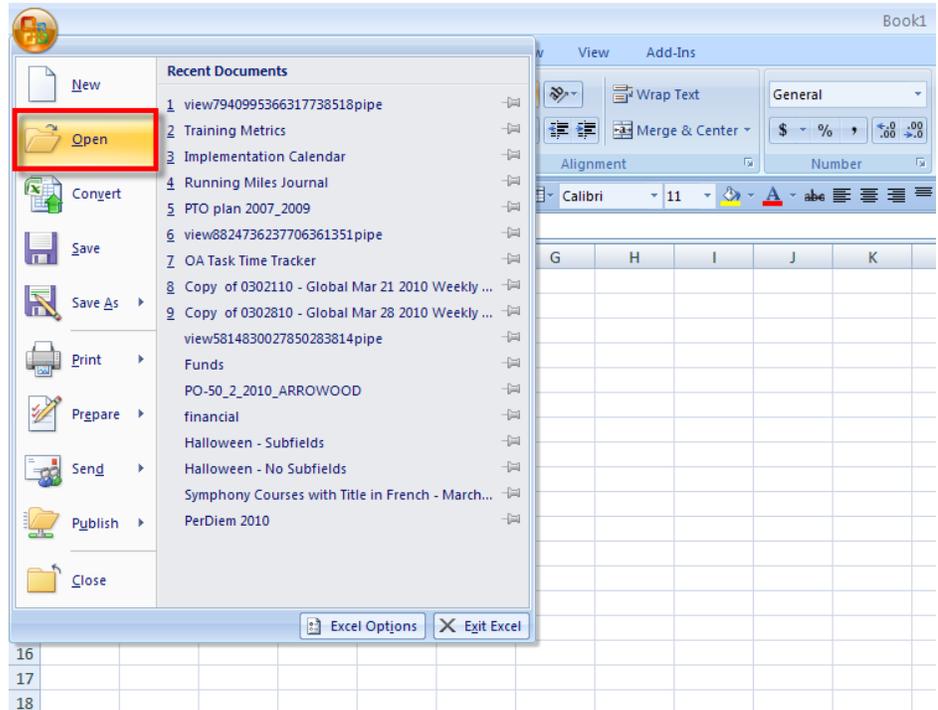
View Email (b) Remove Close

- When a new window appears displaying the data in the WordPad application, click **File** and then **Save As** to save it to your desktop or a destination where you can retrieve the file.

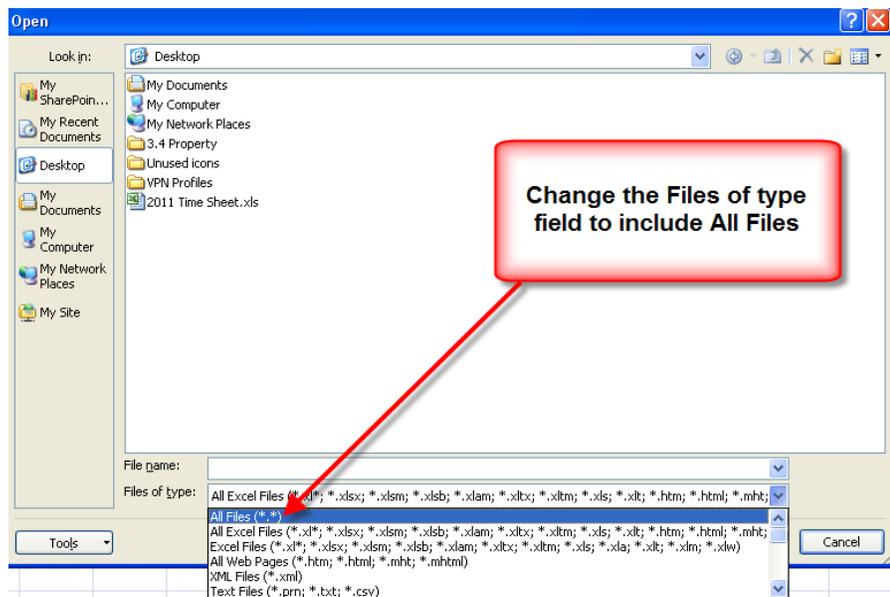


To open the saved file using Microsoft Excel:

1. Open Microsoft Excel.
2. Use the Microsoft Excel option to open up the Desktop.



3. Change the Files of Type field from All Excel Files to All Files.

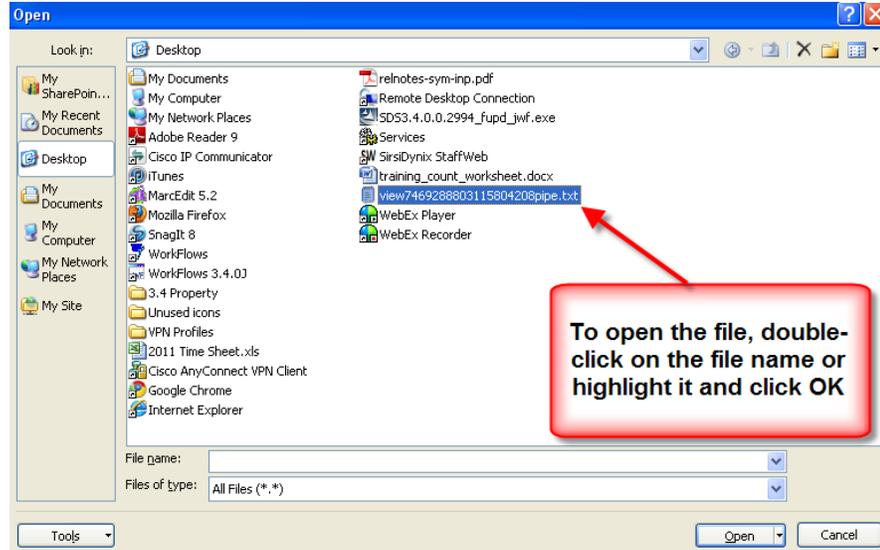


4. Locate the file on the Desktop or the location where you placed the file.

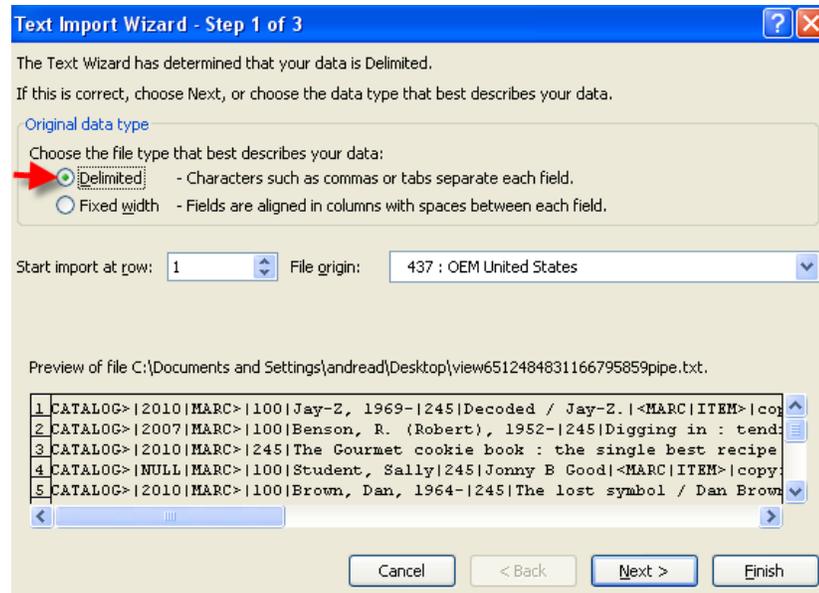


The All Excel Files option displays by default in the Files of Type field and you cannot see the recently saved .txt file.

5. Double-click the recently saved file or highlight it and click **Open**.



6. Once a new window appears, select the Delimited radio button and click **Next**.

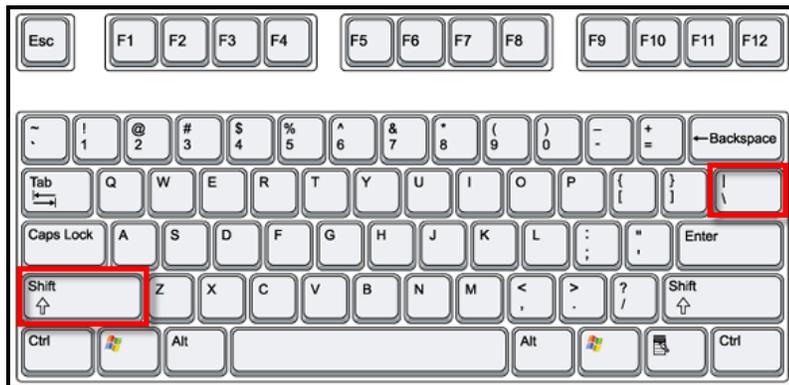


7. Next, uncheck the box next to Tab, select the Other checkbox, and enter the pipe delimiter character (|) into the text box next to the Other checkbox.

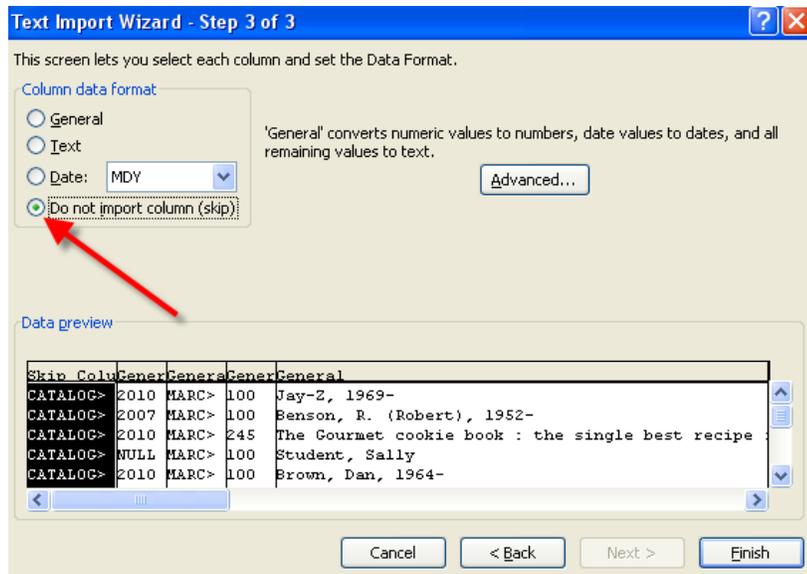




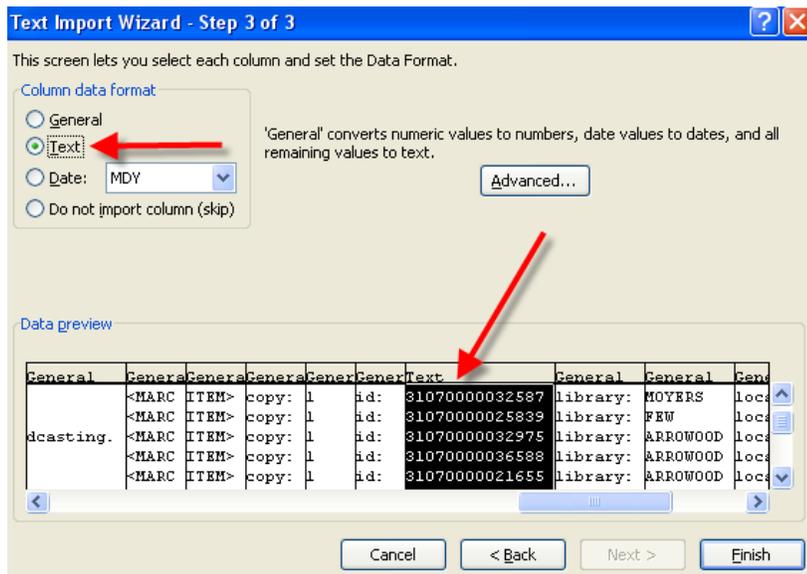
The pipe delimiter character is above the back slash key which is located above the Enter key. (To use the delimiter character, hold the Shift key while pressing the delimiter/back slash key).



8. Click **Next**.



9. To delete columns you do not need, highlight that column and click the Do Not Import (Skip) option.
10. If you are importing barcodes/Item IDs, click the Text option.



11. Click **Next** and then **Finish**.



You should note that the output results may not be formatted according to your preferences. Use your Excel formatting skills to adjust the result output as desired.

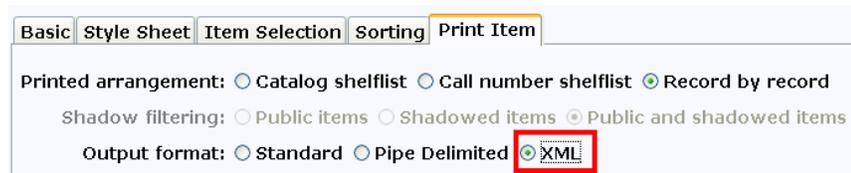
Viewing Report Results with XML Output

Many reports in SirsiDynix Symphony Workflows that use a Print Tool, such as Print Item or Print User, to generate printed results may now be set to display and print using Extensible Markup Language (XML) output. This allows administrators to export report results into third-party programs in order to format and present the results more effectively. XML can be read by a wide variety of programs, including commonly available browser, document, spreadsheet, and database applications.

Furthermore, each printing tool that can produce XML output comes with a default style sheet. This style sheet defines the look and feel of the XML output for all reports that use that tool. For example, all reports that print items use the same default style sheet, unless otherwise specified.

To run a report with XML output:

1. Open the report you want to run.
2. Click the **Style Sheet** tab.
3. Using the Default Style Sheet drop down, select the style sheet you want to use.
4. Make any necessary selections in the other tabs.
5. Click the **Print** tab of the report you are using.



6. Select the XML Output Format option.
7. Click **Run Now**.
8. Click **Display Finished Reports**.
9. Double-click the report you want to view or highlight it and click **View**.
10. To view only the results uncheck the box next to View Log.



11. If necessary, use the Style Sheet drop down to select a different style sheet than the one originally selected in the report.
12. Click OK.

Marc		
Tag: 245	Title: American beauty [videorecording] / Dreamworks Pictures ; a Jinks Cohen Company production ; directed by Sam Mendes ; written by Alan Ball ; produced by Bruce Cohen & Dan Jinks.	
Copy: 1 Id: 31070000476792	Home location: DVD Created: 12/18/2001 Cat1: Pieces: Cat1:	Price: \$0.00 Type: DVD Cat2: Last used: // Total holds:
Marc		
Tag: 245	Title: Auntie Mame [videorecording] / Warner Bros. Pictures Inc.	
Copy: 1 Id: 310000007	Home location: DVD Created: 04/20/2007 Cat1: Pieces: Cat1:	Price: \$12.95 Type: DVD Cat2: Last used: // Total holds:
Copy: 1 Id: 310000708	Home location: DVD Created: 12/14/2007 Cat1: Pieces: Cat1:	Price: \$24.95 Type: DVD Cat2: Last used: // Total holds:

13. Click the X on the browser window when you have finished viewing the report.

Exercises

1. Produce a list of all BLOCKED users at a library of your choice.
2. Create a list of missing items (hint: Use the Current Location field). Print out just the call numbers and brief bibliographic and item information.
3. Setup a template for any list report.

Statistics Reports

In this section, we look at reports that will provide column and row output of statistical data.

Upon completion of this section you will be able to:

- Make appropriate statistics report selections.
- Output columns and rows according to selected policies.
- Run reports on a regularly scheduled basis.

Statistics Reports Overview

Statistics reports produce tables of current and historical statistical information from the Symphony system. Examples of the current statistics type report include Current Users Statistics, Current Charges Statistics and Item Statistics.

The Transaction Statistics report is used to produce statistics on item and user historical transaction data.

Scheduling a Statistics Report

Statistical reports are normally scheduled to run on a regular basis (e.g., daily, weekly, monthly, quarterly, or annually). Let us say you need to know the number of users listed by user profile in your system on the first day of every month. In this case, a count report would not work because it will only render the total number of users.

To schedule a statistics report:

1. Click the *Schedule New Reports* wizard.  Schedule New Reports
2. Click the **User** tab.



3. Double-click the Current Users Statistics report or highlight it and click **Setup & Schedule**.



The Current Users Statistics report will provide statistics based on current users. To gather complete historical statistics, use the Transaction Statistics report in the **Administration** tab of reports.

4. If necessary, enter a report name that will indicate the selections you are making.

The screenshot shows a dialog box titled "Schedule New Reports : Schedule Current Users Statistics". It has two tabs: "Print Separate Reports For Each Library" and "Output Format". Under "Print Separate Reports For Each Library", there are sub-tabs: "Basic", "User Selection", "User Status Selection", and "Transaction Statistics". The "Basic" tab is active, showing fields for "Report name", "Description", "Title", and "Footer". The "Report name" field contains "Current Users Statistics", "Description" contains "Statistics based on current users.", and "Title" contains "User Statistics". At the bottom, there are buttons for "Schedule", "Run Now (b)", "Save As Template", and "Cancel".

5. Make any necessary selections in the tabs provided, such as User Selection and User Status Selection.
6. Click the **Transaction Statistics** tab
7. Select the appropriate Column and Row fields, which serve as the column and row headers in the report results.

The screenshot shows the same dialog box as above, but with the "Transaction Statistics" sub-tab selected. The "Column:" dropdown is set to "User profile" and the "Row:" dropdown is open, showing a list of options: "Total", "User category 3", "User category 4", "User category 5", "User clearance", "User department", "User ID", "User library", and "User profile". A red arrow points to "User category 5" in the list. The "Schedule", "Run Now (b)", "Save As Template", and "Cancel" buttons are visible at the bottom.

8. Click **Run Now** to run the report now; or, click **Schedule** to run the report at a later time and/or date.



Refer to the [Scheduling Reports](#) topic in this guide to review how to schedule a report.

Viewing Statistics Reports

Once the scheduled statistics report has run, you can open up the report to view the results.

To view statistics reports:

1. Click the *Finished Reports* wizard.  Finished Reports
2. Double-click the appropriate report or highlight and click **View**.
3. To view only the results uncheck the box next to View Log.



4. Click OK.

If you did not choose to use pipe-delimited output, your results should be in tabular format based on the column and row selections you made in the **Transaction Statistics** tab of the report.

User Statistics
Produced Friday, January 28, 2011 at 9:56 AM

Report for:
All User libraries
All User profiles

User profile	User library	CAFFEY	FEW	MOYERS	TOTAL	
ADULT	ARROWOOD	18	8	8	13	47
FACULTY		2	0	1	0	3
JUVENILE		5	3	4	5	17
HONRES		1	0	0	0	1
STUDENT		10	7	15	12	44
TOTAL		36	18	28	30	112

5. When you have finished viewing the results, click the X in the WordPad document.

Exercises

1. Set up a statistical report that presents numbers on all item types owned by all the libraries in your system. Select appropriate Column and Row output. Save it as a template
2. Schedule this template to run monthly.

Notice Reports

In this section you will learn how to run reports that provide information to your patrons in the form of notices.

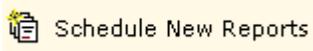
Upon completion of this section, you will be able to:

- Select the appropriate notice report.
- Make selections to notify users regularly.
- Create custom notice text.
- Email users their individual notices.

Running a Notice Report

Depending on your library's needs, you may notify users of their circulation activities such as: available holds to pick up, overdue items to return, active bills to pay. You may also notify users of general library announcements. SirsiDynix Symphony also has reports that notify acquisitions vendors about orders to send or claims to rectify. For today, let us consider setting up and scheduling the New Overdue Notices report. This report notifies patrons of items that have recently become overdue.

To run a notice report:

1. Click the *Schedule New Reports* wizard. 
2. Click the **Circulation** tab.
3. Double-click the New Overdue Notices report or highlight it and click **Setup & Schedule**.



The New Overdue Notices report will not allow the selection of material that is not yet overdue. If there is a need to select material that is due in the future and not yet overdue, the Overdue Notice report should be used.

Schedule New Reports : Display Template Reports

Templates	Acquisition	Acquisition load	Administration	All Invent
Request	Reserve	Scanner	Selection list	
Gateway	E-Library	Info Desk	Maintenance	M
BISAC	Booking	Circulation	Custom	Debt Collection

Report name >>	Source
List Users with Charges	chargeuser
List Users with Holds	holduser
New Overdue Notices	noverdue
Notice for Cancelled Holds	holdcancelntc
Notify User via Phone	notifyviaphone
Overdue Notice	overdue
Print Circulation Table	prtcirtab
Print Shipping Records	printshippack
Process Long Overdue Items	longoverdue
Purge Charge History	purgeloanhist
Purge Inactive Holds	purgeholds
Recall Notice on Charged Items	recallntc
Recall Title Hold Notices	return

4. If necessary, enter an appropriate name into the Report Name field on the **Basic** tab based on the purpose of the report.
5. Select the **Charge Notice** tab.

Schedule New Reports : Schedule New Overdue Notices

Produce Mailing Labels	Print Separate Reports For Each Library
Basic	Charge Selection
Item Selection	User Selection
User Status Selection	Sorting
Charge Notice	

Count as a notice sent
 Combine Notices
 Library address on notice
 Use Library Address in Patron Record
 Select 'Sent-From' Library:
 Library address: Primary Address 1 Address 2 Address 3
 Salutation on notice
 User ID on notice
 Group ID on notice

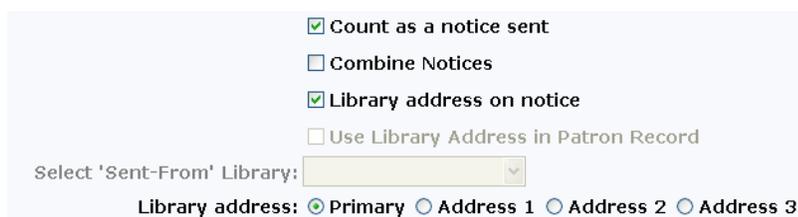
Message 1: Date:
 Message 2: Date:
 Message 3: Date:
 Message 4: Date:
 Message 5: Date:

Closing text:
 Notice type: Overdue Recall

Making Notice Selections

There are common selections to all notice reports although the selection may not always be found in the same location on the **Notice** tab. The following points and graphics illustrate the various options you have when running a notice report:

- **Count as a Notice Sent.** If this check box is selected, the number of overdue notices or assumed lost item notices sent increments for each charge selected by the report. Alternately, the number of recall notices sent can increase if the Notice Type selection, if available, is set to Recall. The Count as a Notice Sent selection keeps track of the notices each user receives, so that overdue and recall notices may be sent in the proper order.
- **Combine Notices.** If this check box is selected, all notices for the user will be combined into one notice without regard to which library is the owning library or the charging library. By default, this check box is cleared. For example if a user had overdue items checked out from two different libraries, both overdue notices would be combined in this one overdue notice.
- **Library Address on Notice.** Specifies which address of the library will be printed on the notice. The Primary, Address 1, Address 2, or Address 3 address as defined in the library's user record can be selected. If no address is selected, the primary address listed in the library's user record is used.



The screenshot shows a configuration panel for notice reports with the following options:

- Count as a notice sent
- Combine Notices
- Library address on notice
- Use Library Address in Patron Record

Below these options is a dropdown menu labeled "Select 'Sent-From' Library:" and a radio button group labeled "Library address:" with four options: Primary, Address 1, Address 2, and Address 3.

- **Use Library Address in Patron Record.** If this check box is selected, the library's address displays on the notice. The exact address that prints on the notice is determined by the setting of the Library Address option. The Library Address on Notice check box is not available in the Create Charge Notices in Batch report.
- **Salutation on Notice, User ID on Notice, and Group ID on Notice.** If this check box is selected, the salutation "Dear User Name:" precedes the notice text, with the user name as defined in the user's record, in addition to the user name and address that prints on all notices. If the user has a Title defined in the user record, such as Mr. or Ms., it is used instead of the user's first name in the salutation.

Salutation on notice

User ID on notice

Group ID on notice

- **Notice Type.** This option keeps track of the type of notice to be sent out to the user. If Overdue is selected, overdue notices are printed. If Recall is selected, recall notices are printed.
- **Brief Bibliographic Information.** If the Brief Bibliographic Information check box is selected, the notice includes title and author for the charged item.
- **Call Number.** If the Call Number box is selected, the notice includes the call number and item ID of the charged item.
- **Accrued Fine.** If the Accrued Fine check box is selected, the fine that the user has accrued for the particular charge to date is printed in the notice.



Accrued fines are NOT set bills, but an up-to-date amount owed on items which are currently overdue. Choosing to include the accrued fine on a notice may mislead the user when they finally return their overdue item(s) as the amount at the time of discharge may be higher than that which was shown on their notice.

- **Item Price.** If the Item Price check box is selected, the price entered in the item record is printed on the notice for each item.
- **Generate Pipe Delimited Output.** This option enables the system to produce the results of the notice report with a pipe delimited format that can be opened using a third-party application.

Title information to print with due date and time: Brief bibliographic information
 Call number

Price and fine information to print: Accrued fine
 Item price

Output format: Standard Pipe Delimited XML



Selecting Notice Texts and Incremental Dates

The New Overdue Notices report can notify users incrementally regarding their overdue items. You can manage the actual text sent to patrons based on how many notices the user has already received and the length of time that has passed since the item was due.



The **Count as a Notice Sent** check box must be selected for this incremented notification to work.

To modify notice texts and incremental dates:

1. While on the **Charge Notice** tab, fill in the Message 1-5 fields with the appropriate counter and notice file.

Message 1:	<input type="text" value="=0,1stoverdue"/>	<input type="checkbox"/>	Date:	<input type="text" value=":D0"/>
Message 2:	<input type="text" value="=1,2ndoverdue"/>	<input type="checkbox"/>	Date:	<input type="text" value=":D0"/>
Message 3:	<input type="text" value="=2,finaloverdue"/>	<input type="checkbox"/>	Date:	<input type="text" value=":D0"/>
Message 4:	<input type="text"/>	<input type="checkbox"/>	Date:	<input type="text"/>
Message 5:	<input type="text"/>	<input type="checkbox"/>	Date:	<input type="text"/>

By default, the Message 1 field's counter is "0" and its notice file is "1stoverdue." This means that the user will receive the first overdue notice if they have not received any notices yet, as illustrated in the delivered language below:

"1ST OVERDUE NOTICE"

**The following Library materials are overdue. Please return them as soon as possible.
Thank you.**

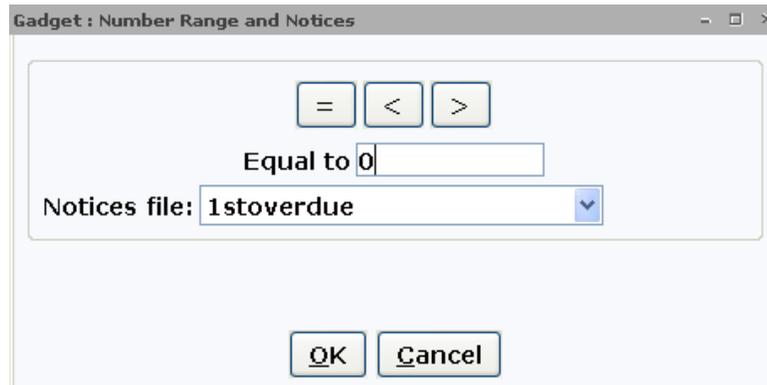
The Message 2 field default values are also set where the counter is "=1" and the notice file is "2ndoverdue". Again, this means that the user will receive the second overdue notice (with different language than the first overdue notice) if they have already received the first overdue notice, as illustrated below:

"SECOND OVERDUE NOTICE"

**The following Library materials are still overdue, even though a notice was sent to bring this to your attention. Overdue charges are continuing to accrue. Please return these materials and pay the fines associated with these items.
Thank you.**



- To modify the default values for the Message 1-5 fields, select the appropriate gadget.
- When the new window appears, click on the buttons above the Counter field to qualify the number of notices already received (e.g., less than, more than).



- Select the appropriate notice file from the Notices File dropdown menu.
- Fill in the Date fields based on when you want users to receive the various overdue notices, and take into account the due date of the overdue item.

Message 1:	=0,1stoverdue	Date:	:DO
Message 2:	=1,2ndoverdue	Date:	:DO
Message 3:	=2,finaloverdue	Date:	:DO
Message 4:		Date:	
Message 5:		Date:	

By default, the Date field associated with the Message fields is set to :DO. This means that the system will select items that are marked as overdue since the beginning of the system until the date the report is run (i.e., today). This means that if you schedule the report to run every day, the user will receive the first overdue notice today (assuming they receive the overdue notice via email), the second overdue notice tomorrow (assuming that they have not had the opportunity to return the overdue item), and the final overdue notice on the following day (again assuming that they didn't have the opportunity to return the item in the two days they received previous overdue notices).



Your use of the Message fields depends on the number of notices you send to users before taking more severe action. Each message

can be increasingly stern. By using the Count as a Notice Sent check box SirsiDynix Symphony can distinguish between who last received their first, or second, or third notice, and automatically sends the next notice in the series — all in a single report.

Since most libraries prefer to give users time to return their overdue items, the following steps illustrate how to notify users incrementally of their overdue items.

6. In the **Charge Notice** tab, click on the *Date Due* gadget next to the Message field.

Gadget : Date Range

Use data for dates within a period starting from the beginning of the system ending the date this report will be run.

Start date

Since the beginning of the system

The date this report will be run

Before

After

1 Days

End date

No ending date

The date this report will be run

Before

After

1 Days

OK Cancel

7. Select a Start Date.

Start date

Since the beginning of the system
 The date this report will be run
 Before
 After

This option enables the system to search for all items that have been marked as overdue beginning with the date you indicate here. The following explanations clarify the variety of selections to make:

- **Since the Beginning of the System** (default option). This option enables the system to search for any item that became overdue since the moment the system started tracking overdue dates.
- **The Date This Report Will Be Run.** This option enables the system to search for any item that became overdue starting today.
- **Before.** This option enables the system to search for any item that became overdue starting with the number of days/weeks/months indicated before today. For example, if you entered three days into the appropriate fields of the Start Date section, the system would search for items that were marked as overdue starting three days before today (i.e., three days ago).
- **After.** This option enables the system to search for any item that will become overdue starting with the number of days/weeks/months indicated after today. For example, if you entered five days into the appropriate fields of the Start Date section, the system would search for items that will be marked as overdue starting five days after today (i.e., five days from now).

8. Select an End Date.

End date

No ending date
 The date this report will be run
 Before
 After

This option enables the system to search for all items that have been marked as overdue ending with the date you indicate here. The following explanations clarify the variety of selections to make:

- **No Ending Date.** This option enables the system to search for any item that is still checked out.
- **The Date This Report Will Be Run** (default option). This option enables the system to search for any item that became overdue ending today.
- **Before.** This option enables the system to search for any item that became overdue ending with the number of days/weeks/months indicated before today. For example, if you entered three days into the appropriate fields of the End Date section, the system would search for items that were marked as overdue ending three days before today (i.e., three days ago).
- **After.** This option enables the system to search for any item that will become overdue ending with the number of days/weeks/months indicated after today. For example, if you entered five days into the appropriate fields of the End Date section, the system would search for items that will be marked as overdue ending five days after today (i.e., five days from now). This option is typically used to select items for pre-overdue notification. The New Overdue Notices report cannot generate courtesy notices. Only the Overdue Notice report can be used to create such notices.



The week and month selections refer to the calendar week and month. For example, if you select 1 month before today in the Start Date section, and today is Oct 10, the system will search for items that were marked as overdue beginning Sep 1 since September is one calendar month before October. The same is true with the End Date section except that the system will search for items that were marked as overdue ending Sep 30, the last days of previous calendar month.



“Since the beginning of the system” could possibly take into account hundreds or thousands of charges if you have not notified users previously, and or the report will include special users like MISSING or DISCARD whose items were due sometime long in the past.

Therefore you may wish to exclude certain user profiles (e.g., MISSING, DISCARD, REPAIR) if you are using the “Since the beginning of the system” option. An alternative is to specify a tighter date range. For example, you could say that the start date for when these items were due is exactly 7 days before the report



runs, and that the end date for when these items were due is exactly 7 days before the report runs.

9. Click **OK**. The updates should appear in the appropriate Date field according to a system-configured format.

Message 1:	=0,1stoverdue		Date:	:DE-7
Message 2:	=1,2ndoverdue		Date:	:D0
Message 3:	=2,finaloverdue		Date:	:D0
Message 4:			Date:	
Message 5:			Date:	

10. Modify the remaining Date fields for as many overdue notices that must be produced.
11. Schedule the report to run according to your preferred schedule by clicking **Schedule**.



For more information about scheduling a report, the topic on [Scheduling Reports](#) in this training guide.

Changing Notice Text

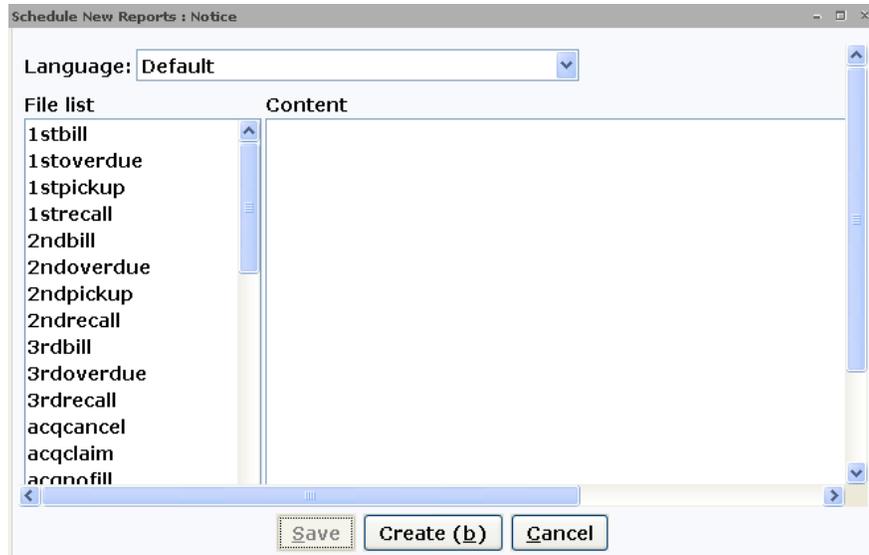
You can use the *Notices* helper to view the delivered wording of notices. This helper also enables you to modify the wording of an existing notice file or create a new notice file which could be associated with Message fields on the **Charge Notice** tab of the notice report.



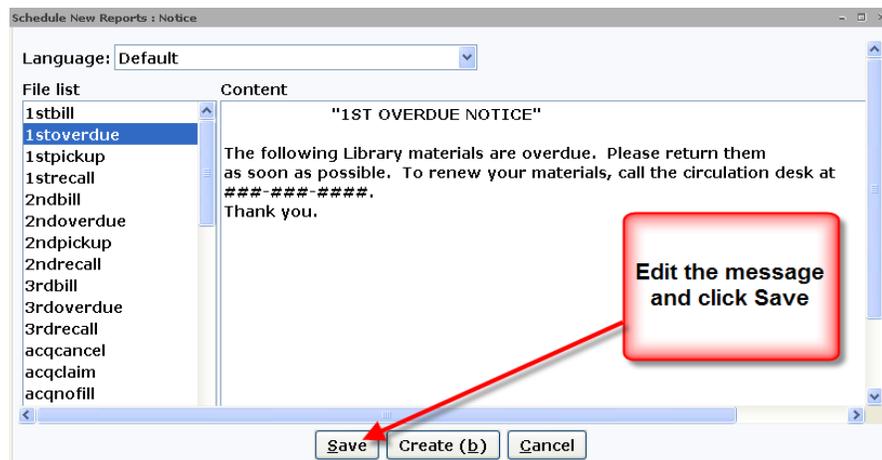
See your system administrator if you need to have this helper enabled.

To modify the text in a notice file:

1. Within the **Notice** tab of a report, click the *Notices* helper. 
2. Click the notice text you want to change from the File List.



3. Edit the text in the Notice window.
4. Click Save.

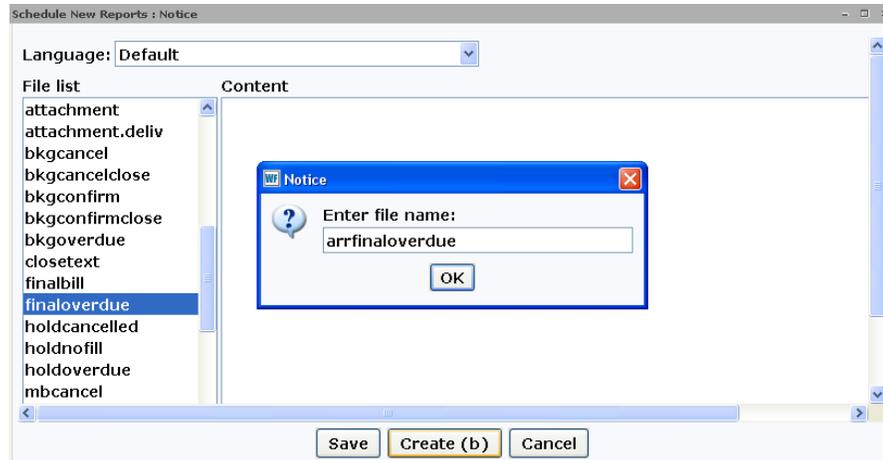


Creating a New Notice File

If you do not see a notice file that you intend to use in a notice report among the delivered notices files, you can create a new one.

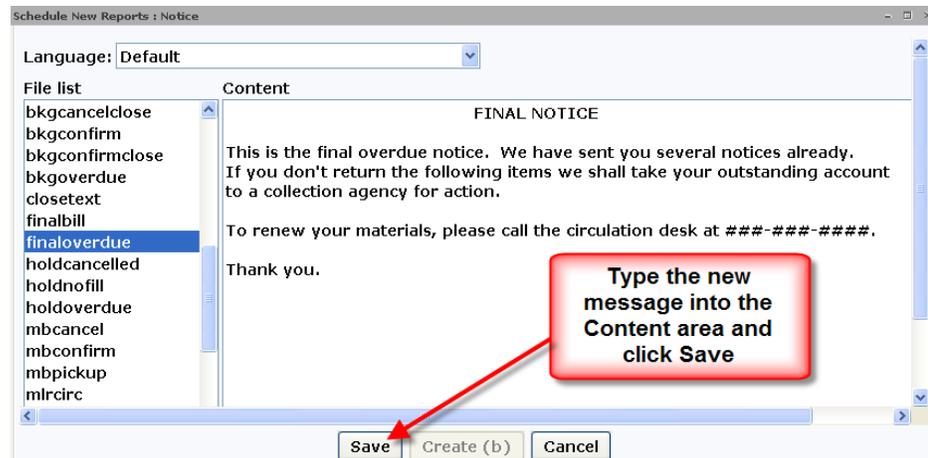
Follow these steps to create a new notice file:

1. Within the **Notice** tab of a report, click the *Notices* helper. 
2. Click **Create**.
3. Enter a notice file name and click **OK**.



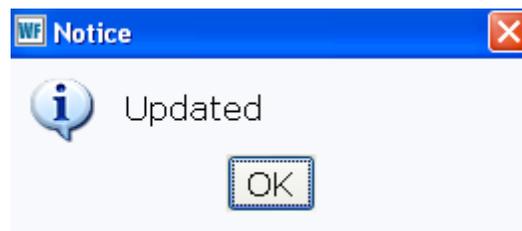
Clicking **OK** creates the notice file although you won't be able to find it among the other notices files in the File list quite yet.

4. Enter the notice text for the new notice file in the Notice window and click **Save**.



It is recommended that no formatting, line wrapping, or justification should be attempted when editing notice text. Hard carriage returns should be used at the end of each line so that notice text will display and print consistently.

5. Click **OK**.

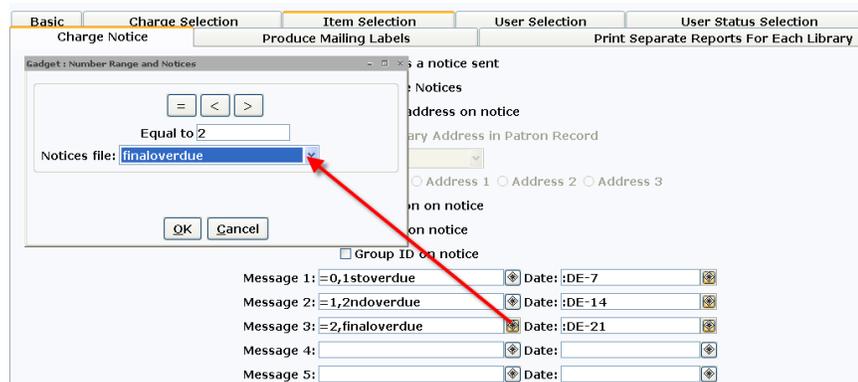


6. Click **Cancel** to return to the report where you can select the new notice file in the appropriate Message field.



If the new notice file you just created does not appear in the Notice file drop down menu in the *Message* gadget, you may need to close the report or save the report as a template. Reopen the report and the new notice file will be available in drop down.

The following graphic illustrates the Notice File drop down menu in the *Message* gadget window:



Emailing Notices

WorkFlows can automatically email notices generated by notice type reports to users who have valid email addresses in their user records.

To email notices:

1. Click the **Schedule** button while in the current notice report.
2. Select the start date and time in addition to the frequency for when you want to run this notice report.
3. Select the Auto Email to Recipients with Email Addresses in Their Patron Record checkbox in the Printing/Distribution section of the new window.
4. Select an appropriate email address from the Reply To dropdown menu. This allows the recipients of the notice to respond to the emailed notice.



Printing/Distribution

Send to printer Format

Save to Finished Reports Wizard

Email to Individual(s) Format

Auto email to recipients with email addresses in their patron record

Reply to:

Use the drop down to select a Reply To address or type an address into the field



The email address displayed in the Reply To field comes from the email address on the user record of the staff login scheduling the report.

To type in an address in the Reply To field, the Allow Entering Email Address in Reply To Field checkbox in the *Report Session* wizard must be selected.

5. Click **Schedule**.

The following shows an overdue notice sent to a patron:

Friday, January 28, 2011

Albert Hawkins
 100 W. Broadway
 St. Louis, MO
 63132

"1ST OVERDUE NOTICE"

The following Library materials are overdue. Please return them as soon as possible.
 Thank you.

1 call number:PS3563.C337 A79 1993 ID:31070000356929
 All the pretty horses / Cormac McCarthy.
 McCarthy, Cormac, 1933-
 due:1/19/2011,11:59



When running notices as a test, selecting the option to email users will actually send these notices to the recipients.

Exercises

1. Schedule the Hold Pickup Notice report to notify users about available items on hold.
2. Locate the notice reports related to the Acquisitions module.



Session Settings

In this final section, we will review options to select in the *Report Session* wizard. These settings apply to all the wizards in the Reports module.

By the end of this section you will be able to:

- Set the application to view and print reports.
- Adjust margins for notice reports.
- Set email and print settings.

All report wizards – *Schedule New Reports*, *Scheduled Reports*, and *Finished Reports* – use the same properties page, set in the *Report Session* 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.



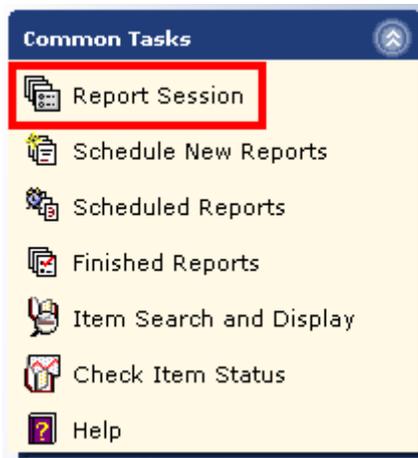
The default settings contained in these session settings will be used throughout the wizards in the **Reports** module.

If no preferred default settings are configured at the start of one of the wizards in the **Reports** module, the *Report Session* wizard displays automatically for review.

Configuring Session Settings

The Reports module is designed to allow you to manage default settings when running reports. Since configuring the session settings depends wholly on individual preferences, this section will not present this material in a procedural format, rather as bulleted informational points.

You can access the default settings by opening the *Report Session* wizard.

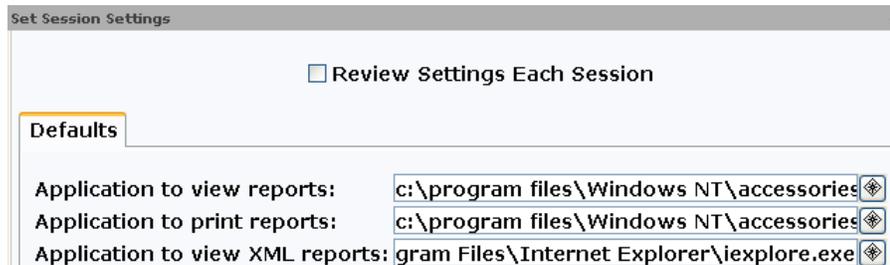


After clicking the *Report Session* wizard, the following window displays:



The following points and screen captures explain the functionality for the various settings you can select.

- **Review Session Settings.** This check box determines if session settings display in the Property window the first time a Reports wizard is used in the WorkFlows session.
- **Application to View Reports.** This field specifies the full pathname to the application that will be launched when viewing templates, scheduled reports, and finished reports. The report displays in the application's document window, and may be printed or saved in the application.
- **Application to Print Reports.** This field specifies the full pathname to the application that will be launched to print templates, scheduled reports, and finished reports. The report displays in the application's document window, and may be printed or saved in the application.
- **Application to View XML Reports.** This field specifies the full pathname to the application that will be launched when viewing XML output of finished reports. The report displays in the application's document window, and may be printed or saved in the application.



For Windows Servers, the pathway in the Application to Print Reports field should contain the following code: “ /p”, which communicates to the system to send the results to the default printer.

Setup & Schedule

- **Display Report Source Column.** Select the Display Report Source Column check box if you want the source name of the report (such as Holdlist) to appear in the Source column of the report tab. If you clear this check box, the Source column will not appear in the report tab. By default, this check box is cleared. You can sort reports by source name by clicking the column header.



Report name »	Source
Assumed lost report	assumedlost
Bill Tax Summary	billtaxsummary
Bill Totals by Bill Reasons	reasontotal
Bill Totals by Bill Type	typetotal
Cash Report Per Workstation	cash
Circulation by Zip Code	zipcodecirc
Circulation Mailer	mlrcirc
Clean Holds Shelf	cleanholdshelf
Count Bills	billcnt
Count Charges	chargecnt
Count Holds	holdcnt
Count Transits	transitcnt
Create Charge Notices in Batch	chargentc
Create Circulation Notices in Batch	ntccirc
Current Bills	billstat
Current Charges Statistics	chargestat
Current Holds Statistics	holdstat
Discharge BWI ebooks	bwirelease

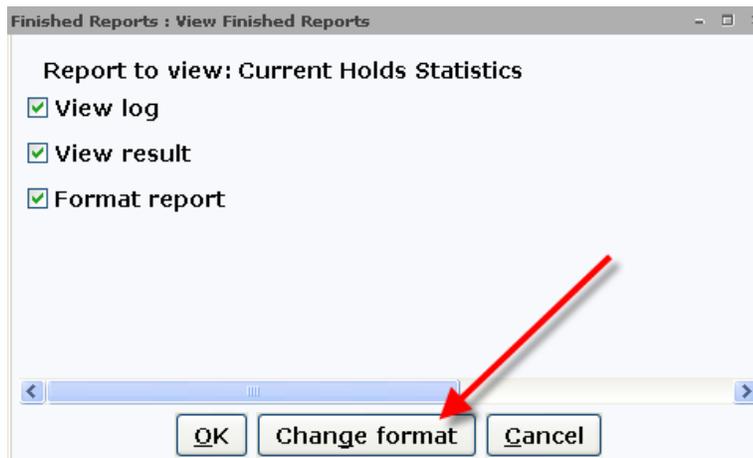
- **Notify Owner When Report Is Finished.** This check box to have SirsiDynix Symphony send a brief email message to the owner of the report when the report has finished, is available for viewing, or has been printed or emailed.
- **Send Notices Automatically.** Select this option to email notices to users when a report that produces notices runs, and to email separate reports to libraries when reports that can produce individual reports are run. The Recipients option under View, Print, or Email Finished Notice Reports allows you to specify which users are to receive emailed notices. For separate reports that are mailed to libraries, the Auto Email to Recipients with Email Addresses in Their Patron Record check box under Printing/Distribution must be selected when the report is scheduled.
- **Preserve Template Owner.** Select this check box to preserve template ownership when a report is run. If this option is selected and a report is run, ownership is reported as the template owner. If the option is not selected and a report is run, ownership remains with the logged in user.
- **Allow Entering Email Address in Reply To.** Select this check box if the field should be editable, allowing staff to enter email addresses manually in addition to selecting them from a list. By default, this check box is cleared.





View, Print, or Email Finished Reports

- **Format Report.** Select this check box to use SirsiDynix Symphony-defined formatting specific to each report, such as report headers, spacing, and page breaks. Unformatted reports will print the code that would have been used to format the report, such as .folddata. Localized language labels, such as \$<recalled:U>, will also be displayed in unformatted data.
- **Include Log.** Select this check box to include the report log in the report output. The report log is a detailed description of the formatting options used and how the selection criteria affected the results.
- **Include Results.** Select this check box to include the primary text of the report in the report output.
- **Display Format Page.** Select this option to include the Change Format option on the report options window when you view, print, or email a finished report. Including the Change Format option allows you to change page format settings if you want to use a printer other than the default printer, or print the report on a nonstandard page size.



Format Page

- **Character Set Table.** Select the character set that is to be used when translating formatted reports. Only formatted reports use this character set. The DEFAULT value is appropriate for most systems except Chinese.
- **Page Length.** This field identifies the length of the printed page according to the printer used to print the report results. (e.g., 72 = the number of rows long).
- **Page Width.** This field identifies the width of the printed page according to the printer used to print the report results (e.g., 80 = the number of columns wide).
- **Top Margin.** This field identifies the starting point where the system will begin printing the report results on the page (e.g., 3 = the third row down from the top of the page).
- **Bottom Margin.** This field identifies the ending point where the system will stop printing the report results on the page (e.g., 0 = the last row at the bottom of the page).

View, Print, or Email Finished Reports

- Format report
- Include log
- Include results
- Display format page

Format Page

Character set table: TY-DISP

Page length: 72

Page width: 80

Top margin: 3

Bottom margin: 0

View, Print, or Email Finished Notice Reports

If you select the Send Notices Automatically option, notices will automatically be sent to the email address in users' records. If notices are sent automatically, you may want to separate e-mail from non e-mail recipients in order 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.

- **All.** Selecting this option automatically sends email notices to users who have an email address in the EMAIL field of the primary address of their user records.
- **Only Those with Email Addresses.** Selecting this option automatically sends email notices to users who have an email address in the EMAIL field of the primary address of their user records. No paper notices are produced for users who do not have email addresses in their user records.
- **Only Those without Email Addresses.** Selecting this option automatically prints paper notices only for those users who do not have an email address in the EMAIL field of the primary address of their user records.

View, Print, or Email Finished Notice Reports

Recipients: All

Only those with email addresses

Only those without email addresses

Finished Reports : View Finished Reports

Report to view: 1st and 2nd overdue notices

View log

View result

Format report

For which recipients do you want to select notices?

All

Only those with email addresses

Only those with no email addresses

OK Cancel

