Sirsidynix Symphony 3.3
Reports Basics
Training Guide
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Chapter 1: Introduction and Overview

The SirsiDynix Symphony Reports Basics Training Manual provides instruction on running delivered reports. Specifically, the guide illustrates step-by-step workflows in task-driven settings. Instruction is supported by exercises to help you master the training objectives.

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

The SirsiDynix Symphony Report Basics Manual consists of seven chapters. Below is a short summary of each:

- **Chapter 1: Introduction and Overview.** Introduces you to the training manual and provides an overview of its use.

- **Chapter 2: Understanding Symphony reports.** Introduces how reports work as well as which reports to select and run in certain situations.

- **Chapter 3: Count reports.** Introduces how to run reports that will provide a count of certain records.

- **Chapter 4: List reports.** Introduces how to run reports that will provide a list of certain records. Templates are also covered.

- **Chapter 5: Statistics reports.** Introduces how to run reports that will provide column and row output of statistical data.

- **Chapter 6: Notice reports.** Introduces how to run reports that will notify users about library activity.

- **Chapter 7: Session Settings.** Explains how session settings affect viewing/ printing applications, notice formatting and e-mailing.

The illustrations do not always include field-by-field screen definitions. Please refer to the context-sensitive SirsiDynix Symphony WorkFlows help files for more information.
Conventions

At SirsiDynix, we recognize that training what is topically relevant and functionally urgent is subjective—mostly because libraries differ and considerations vary from library to library.

As you review the material in this manual, feel free to skip around in the order that benefits your learning. Don’t get too tied to the order displayed herein; remember, your training should include the tasks you will perform on the job.

This training manual is designed with large margins and lots of space for your personal notes. Mark up your manual with any tips or information your instructor provides—anything that will help you remember the step-by-step workflows you routinely perform.

Note that wizard names are italicized (e.g., Schedule New Reports wizard) while buttons are bolded (e.g., View button). Modules and wizard groups are also bolded for ease of searching (e.g., Reports module, Common Tasks group).

Arrows are used within screenshots to point the learner to the appropriate wizard, field, etc., within WorkFlows. Some arrows are accompanied by text for clarification purposes.

Icons are used throughout the manual for different purposes. You should be familiar with these icons and their meaning to take full advantage of your training manual:

This icon is presented where you can benefit from a specific tip or a relational idea.

This icon is placed beside a warning. Pay particular attention to this information.

This icon is placed beside a cross-reference. This information will direct you to other manuals or other chapters within this manual.
At the end of each chapter there are exercises that let you review the concepts taught. Here you have lots of space for notes or reminders about workflows as well. As time permits, you will complete many of these exercises during the workshop.
Chapter 2: Understanding Symphony Reports

In this chapter, we introduce you to the ideas behind SirsiDynix Symphony reports and which reports should be run in certain situations.

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

- Understand basic reports functionality
- Select the proper report group with a record database in mind
- Select a proper report to accomplish some objective

Reports Overview

SirsiDynix defines the term “report” to include any process that can be scheduled in Symphony. Here are some examples of what you can do with reports:

- Produce a count of users tied to a particular library
- Generate a list of items you would like to weed
- Create a bibliography of holiday materials
- Send overdue notices to users
- Compare a catalog shelflist to items on the shelf
- Notify book vendors regarding purchase orders
- Update catalog and user indexes
- Remove users or items in batch

Symphony reports are organized into general groups, with specific report types in each group. For example, you will find specific count and list reports in both the Bibliographic and Circulation groups.
Once you select a report and enter selection criteria, the report can be scheduled to run immediately, periodically, or saved as a report template to be run on demand. Finished reports can be printed, e-mailed, viewed, or saved on one’s own computer.
**Report Types**

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

**Count**

Count reports answer the question, “How many meet these criteria?” Examples of this type of report are Count Bills, Count Charges, and Count Items. Count reports can be found in multiple report groups (e.g., Bibliographic, Circulation, User).

**Import/Export**

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

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

List

List reports answer the question, “Which ones meet these criteria?” It is one of the most customizable types of report, in that selection criteria and print options dictate the type of list you will produce. Examples of the list type of report are List Users, List Items, and List Orders.

Maintenance

Maintenance reports make various changes to databases in the system. Examples of this type of report are the rollover series in the Acquisitions group, the Add, Delete, Update Databases report, and the Reorganize and Rebuild reports.
Notice

Notice reports answer the question, “Who needs what information sent to them?” It selects the users, vendors, etc., who will receive the notices. These notices can be e-mailed directly to users. Examples of this type of report are Vendor Acquisition Claims, User Announcement, and New Overdue Notices.

Remove

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

Statistics reports produce tables of information gathered from the Symphony system. Examples of the statistics type include Current Users Statistics, Item Statistics and Transaction Statistics.

Choosing the Correct Report Group and Report Type

To be successful in running reports, you must know how to choose the correct report group and report type. This depends on a few things, namely the records involved and the task at hand.

For example, let’s say you want to run a report to find a list of titles.

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

2. If the Set Session Settings window appears, select OK.

3. If the Schedule New Reports: Property window appears, select OK.

Since we’re talking about bibliographic information, it’s fair to say that the Bibliographic group is a good choice.
Now we need to think about what we want to accomplish. If we want a list of titles, chances are that a report exists with the word “List” included.

You have several list reports to choose from. Which one meets your needs? You now need to think about the specific records you want to select and view and compare that with the report names seen.

If you want a list of titles, the List Titles report would be a good choice. However, we will later see that each report has one or more selection tabs which correspond to different records in the system (titles, call numbers, items, etc.). If we need to make selections on call number records, then we would be better served by the List Call Number Records report instead.

For now though you can see that there are one or more reports seen here that could get you the information you need.
Selecting Among Similar Report Groups

Sometimes you will have multiple report groups to choose from in meeting some objective.

For example, let’s say that you want a count of users at a particular library. One might think that the Circulation report group is where you should go.

However, you do not see a “User Count” report. So you will need to scan the other report groups to see other possibilities.

You will see that there is a User report group. This group will contain the report you desire.

Here you will also see a Count Users by Dept or Birthyr report. The difference you will see is that this report gives you additional sorting options. Other reports that are similar (e.g., List Users, List Users with Charges) differ in that the second report has additional selection criteria based on charge activity.
Exercises

1. Which report group would you select for finding information on current holds and checkouts?

2. Find a report that could list users belonging to a particular library.

3. Which report group would you select to import bibliographic records?
Chapter 3: Count Reports

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

Upon completion of this chapter, 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, as a circulation supervisor, you need a quick 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’s say you are asked for a count of all juveniles in your library. To find this information, follow these steps:

Selecting the Report

Follow these steps to select report information:

1. From the Reports module, select the Schedule New Reports wizard.
2. If the Schedule New Reports: Property window appears, select OK.
3. Choose an appropriate report group. Because we are only talking about users, we will choose the User report group.
4. Choose the report with the word “count” in it. Notice it is the Count Users report.

5. Now click the **Setup & Schedule** button.

You can also setup a report by double-clicking on the report name.
Choosing Criteria

Most reports, including the Count Users report, will produce all records in a database, unless specific criteria are entered. For example, if we run Count Users without any selections, a count of all users in the system will be seen. Therefore, you need to make selections that will produce the results we need.

Follow these steps to choose report criteria:

1. Click in the Report Name field. Now give the report an appropriate name. This will be seen on your finished reports list.

   ![Report Name Field](image)

   The Description will be seen within the report, as will the Title and Footer; however, only the report name is visible in the Finished Reports list.

2. Now select the User Selection tab.

   The fields typically found on a user record display:

   ![User Selection Tab](image)
If you were to run this report without filling in any of the fields, you would be telling the report to count ALL users. By running the report with a field empty, the system considers users having all appropriate values for that field.

If you leave the Library field blank, users belonging to all libraries will be considered. The principle, then, is to fill in a field only when it is part of your question.

As an example, if you want a count of all juveniles at a particular library, you will need to make selections within the Library and User Profile fields.

3. You will enter information using a **gadget**.

4. Select the gadget for the Library field.
5. Select the appropriate value. In this case it would be a Library policy.

6. Now click the right facing arrow.

7. Click OK.

You can also select a value by double clicking on the value.

Now you will see that the value has been entered into the appropriate field. As you become more familiar with SirsiDynix Symphony reports, you will be able to enter information into these fields from memory. However, it is suggested that you use the gadgets when you are unclear about what information to enter or how that information should be entered.

8. Now click the User Profile gadget.
9. Choose the appropriate value. Then select the *right-facing arrow*.

10. Click **OK**.

    Since we only want a count of all juvenile users at our library, we are finished with our selection criteria.

    At this point we can go ahead and run the report.

11. Click the **Run Now** button.
A confirmation screen will appear.

12. Choose **Display Finished Reports** to find the report you just ran.
Viewing Finished Reports

To display finished reports, you can click on the Display Finished Reports button as illustrated. You can also select the Display Finished Reports wizard if you closed out of the previous window.

Follow these steps to display your finished report:

1. Select the report you just ran.
2. Select the View button.
You can also view a report by double clicking on the report name.

3. Select **OK** for the window that appears.

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**

You can display the finished report you choose to view in another application, such as Notepad.

Report Log for User Count
Report usercnt scheduled as Count Users-juveniles at my library
A count of users.

UNICORN user selection 3.2.1 started on Thursday, January 15, 2009, 10:51 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.
191 user record(s) considered.
7 user record(s) selected.
UNICORN user selection finished on Thursday, January 15, 2009, 10:51 AM

UNICORN userstatus selection 3.2.1 started on Thursday, January 15, 2009, 10:51 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
7 userstatus record(s) considered.
7 userstatus record(s) selected.
UNICORN userstatus selection finished on Thursday, January 15, 2009, 10:51 AM
Seven is the number of juvenile users in our library. Let’s take a closer look at how we know that answer.

These fields indicate our selection criteria:

Users will be selected if user library is ARROWOOD.
Users will be selected if user Profile is JUVENILE.

This is the total number of users in the system:

191 user record(s) considered.

And this is the number of users who met our selection criteria:

7 user record(s) selected.

There are some other numbers listed below. This refers to the status of user records (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.

7 userstatus record(s) selected.

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

1. Produce a count of PUBLIC users system-wide.

2. Produce a count of all items with an item type of BOOK, or, all BOOKS.

3. Produce a count of all users who do not have an OK status. Hint: focus on the radio buttons of the Delinquency Status gadget.
Chapter 4: List Reports

In this chapter, we introduce you reports that will list various records. We will also learn to save reports as templates and modify templates for best usage.

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

- Select an appropriate list report to meet some objective
- Make proper selections to limit your results
- Use print options to display the right amount of information
- Save reports as templates

Remember that list reports answer the question, “Which records meet these criteria?” Examples of this type of report are List Bills, List Charges, and List Items. You might run this type of report if, as a circulation supervisor, you need to know which users are barred from checking out material.

Running a List Report

Once again, the first step is thinking about the information you need. Let’s say you are asked for a list of all items created last week, regardless of which library owns them.

Follow these steps to display list information:

1. From the Reports module, select the Schedule New Reports wizard.
2. If the Schedule New Reports: Property window appears, select OK.
3. Choose an appropriate report group. Because we are only talking about items, we will choose the Bibliographic report group.
4. Choose the report with the word “list” in it. Here we see it is the List Items report.

5. Double-click on the report in question, or select the Setup & Schedule button.

6. In the Report Name field, enter a descriptive name. This will remind you of the selections made in the report and will distinguish your report from others in the finished reports list.

7. Click on the Item Selection tab.
Choosing Criteria

You will need to make specific selections from the **Item Selection** tab.

If you do not “filter” using this tab, a list of ALL the items in your system will be chosen and the report will take a very long time to complete. Your computer might not even be able to display a report that large.

Follow these steps to choose report criteria:

1. Choose the *Date Created* gadget.

2. This gadget is for a calendar. To create a date range, select the **Range** button.
3. Select the Use data for this period gadget.

Now you will need to select a start date from the calendar. Notice the green arrows for month and year. You could use these to find a day from a previous month.

4. Select OK.

5. Select the Thru gadget and choose an end date.

6. Select OK.

7. Select OK again.
Sorting Options

Most list reports include a sort option.

Follow these steps to sort report information:

1. Select the **Sorting** tab.

2. Click on the drop-down area to reveal sort options. It is possible to sort by title (alphabetically), call number or by “flexible key.” This last option is the Title Control Number found for each bibliographic record in the system (e.g., o48242445 for OCLC based title control number, i9780782141306 for ISBN based title control number).

3. Select a Call Number sort option.

Printing Options

Once you have selection criteria and a sort option selected, let’s next consider the information that you can print on the report.

1. Select the **Print Item** tab.

By default, you are printing the bibliographic record for each qualifying item (“Record by Record”). You also see that it is possible to generated pipe-delimited output, which could be used in a spreadsheet application, such as Microsoft Excel.

2. Leave these options as is:
3. View the Title Information section. By default, you will print the publication year for the title, plus the bibliographic information listed in the Entry List field.

4. Select the Entry list gadget

5. Select the Brief radio button.

6. Select OK.

Let’s now look at our call number options. You see that it is possible to print the call number alone, or print the call number record which includes information like the class scheme (e.g., DEWEY). There is also an option not to print the call number at all.
7. Select the Call Number Only radio button.

There is also an Item Information option that allows all, some or no information to be printed.

8. Choose Brief Copy Information and select the Holds checkbox. This will allow us to see the popularity of our new items.

To see what constitutes “brief copy information”, etc., please refer to the WorkFlows online helps.
Saving a Report Template

If you would like to run this report on demand without having to enter the same selection criteria over and over, you will want to save the report as a template.

Follow these steps to save a list report as a template:

1. Select the **Save as Template** button.

2. A confirmation window will appear. Select **OK**.

Running a Report Template

You can now run your saved template whenever you would like.

1. Select the Templates group of reports.

2. Double click on your list report, or select the report and choose the **Setup & Schedule** button.

3. Select **Run Now**.
4. Click on the Display Finished Reports button. If your report isn’t on the finished list, yet, use the Refresh Report List helper (the “rabbit”) 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.

5. Double click on your finished report.

6. If you only want the results, deselect the log.

7. Select OK. The list will appear.

Item List

Produced Tuesday, January 27, 2009 at 2:53 PM

1982 Uniform title: Health (Guilford, Conn.)
   Title: Health.
   100.21 HEA 2009/10
   *Holds:0
   copy:1 id:31071242134124 library:ARROWOOD
   location:AVAIL_SOON

2005 Personal Author: Kelley, Jocelyn.
   Title: A knight like no other / Jocelyn Kelley.
   CPB BOX
   *Holds:0
   copy:1 id:92410-1001 library:ARROWOOD
   location:STACKS
Modifying a Template

You would like to run this list report on demand. But the date range criteria are very specific.

Follow these steps to change your template to add a sliding date range:

1. Click on the Schedule New Reports wizard.
2. Select the Templates report group.
3. Select the list report in question.
4. Select the Modify button.
5. Select the Item Selection tab.
6. Click on the Date Created gadget.

Instead of using a static date range, let’s use a sliding date range. This will be especially useful when running notice reports.

7. Select the sliding date range helper.

All selections depend on the date you are running the report. So if you want to find items created last week, you will need to select the first “Before” radio button and specify the start date.
8. Select the Before radio button and select “Weeks” from the drop-down menu.

9. Choose the second “Before” radio button and also select the “Weeks” option.

The select your date option also includes other options ("Months" for example), for those reports that you would like to run on that criterion.

10. 
11. Select OK.

You will now see that the values in the Date Created field are different. This code is saying to look at items created the week before the report runs.

12. Select OK.

When you next run the report, you will see your selection criteria within the log:

Items will be selected if the date created is not earlier than 1/18/2009 and not later than 1/24/2009.
Exercises

1. Produce a list of all BLOCKED users at a particular library.

2. Create a list of missing items (hint: Current Location). Print out just the call numbers and brief bibliographic and item information.

3. Setup an “on demand” template for list-type report.
Chapter 5: Statistics Reports

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

Upon completion of this chapter you will be able to:

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

Statistics Reports Overview

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

Some reports, like Item Statistics, will look at records currently existing, while other reports, such as Transaction Statistics, look at historical data.

Running a Statistics Report

Let’s say you need to find out how many users are in your system. Normally you would run a count report, specifically the Count Users report. But you want to know how many of these users belong to each library in the system as well as what their user profiles are.

Follow these steps to run a statistics report:

1. From the Common Tasks wizard group, select the Schedule New Reports wizard.

2. If the Set Properties window appears, make any necessary changes to the defaults and click OK.

3. Select the Users group.
4. Look for a report with the word “statistics” in it. It happens to be the Current Users Statistics report.

5. Double click on the report in question, or select the **Setup & Schedule** button.

6. Enter a report name that will indicate the selections you are making.

7. Select the **User Selection** tab.

   We could specify particular users within the User Profile field. But we are interested in all users, so let’s leave our selections blank. The report output will not be that large since we are only outputting numbers.
8. Select the Transaction Statistics tab.

This tab will dictate your output. The column looks fine, since we are interested in User Profile, but let’s change our Row to User Library.

9. Now select the Print Separate Reports for Each Library tab.

Here you can have a separate report be produced for each library in your system. However, you may want all the data in one finished report; so, leave the checkbox deselected.
10. Click on the Report Output tab.

It is also possible to produce a pipe-delimited file that you can use within a spreadsheet application, such as Microsoft Excel. However, for training purposes, keep this checkbox deselected too.

11. Select the **Schedule** button.

12. To schedule the report to run regularly, there are a few options. If you want the report to run once a month, choose Monthly and enter the days of the month the report will run, as well as the first run date and time.

If you schedule a report to run regularly, starting today, the report will run immediately if the time listed has already passed. In other words, if you schedule a daily report that runs every morning, and your start date is today, the report will kick off immediately because that time of the morning has passed.
Viewing Statistics Reports

The statistics report should be running by now, depending on your start date and time.

Follow these steps to view the finished report:

1. Select the Display Finished Reports button.

2. Select the finished report in question. Remember you have a Refresh Report List helper that will refresh the screen.

3. Double click on the finished report, or select the report and press the View button.

4. Select just the results and keep the data formatted.

Your results should look something like this.
5. Scroll through the document to see the other profiles.

<table>
<thead>
<tr>
<th>User library</th>
<th>User profile</th>
<th>ACQ</th>
<th>ADMIN</th>
<th>ADULT</th>
<th>BOOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARROWOOD</td>
<td>1</td>
<td>1</td>
<td></td>
<td>10</td>
<td>1</td>
</tr>
<tr>
<td>CAFFEY</td>
<td>1</td>
<td>0</td>
<td></td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>FEW</td>
<td>1</td>
<td>0</td>
<td></td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>MOYERS</td>
<td>2</td>
<td>0</td>
<td></td>
<td>11</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>5</td>
<td>1</td>
<td></td>
<td>38</td>
<td>1</td>
</tr>
</tbody>
</table>

If you have a small number of libraries, you could have selected User Library for the Column and User Profile for the Row. That way you won't have to scroll through as many pages.
Removing Finished Reports

Eventually you will need to remove your finished reports. You may ask your staff to occasionally remove their own reports or remove them after each is completed.

Follow these steps to remove a finished report:

1. From the **Common Tasks** group, select the **Display Finished Reports** wizard.

2. Select the **Remove** button.

3. Select the report(s) you wish to remove by clicking on the checkboxes.
4. Select **Remove**.

    You may have noticed the *Filter* gadget in the upper left-hand corner of the window.

    ![Filter gadget](image1)

    The *Filter* gadget can be used to filter reports according to report owner or completion date. An alternative is to sort the finished report according to report name, report source, owner, status, or completion date.

    ![Sorted reports](image2)

5. Select a few older reports to remove.

6. Select the **Remove** button.

    ![Confirmation window](image3)

7. Select **Yes** to remove those reports one a time, or **Yes to All** to remove all selected reports at once.

    ![Confirmation window](image4)

8. A confirmation screen will appear. Select **OK**.
Exercises

1. Setup a report template to get numbers on *all* types of items owned by *all* the libraries in your system.

2. Schedule this template to run monthly.

3. Remove the finished report once you view it.
Chapter 6: Notice Reports

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

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

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

Running a Notice Report:

Depending on your library’s needs, you may notify users about one or more of the following: hold pickup, overdues, bills, or announcements. SirsiDynix Symphony also has reports that notify vendors about purchase orders or claims.

Consider overdue item reports as an example. There are several reports that can notify users about overdue items.

Follow these steps to run a New Overdue Notices report:

1. Select the Schedule New Reports wizard.
2. If the Set Properties window appears, make any necessary changes to the defaults and click OK.
3. Because we are talking about circulation activity, let’s look in the Circulation group for the report in question.
4. Select the Circulation group of reports.
5. Find a report with the words “notice” and “overdue” in it. For this training, select the report called “New Overdue Notices.”

6. Double click on New Overdue Notices or select the report and press Setup & Schedule.

7. Give the report a specific name.

8. Now select the Charge Notice tab.
Making Notice Selections

There are common selections to a notice report. Follow these steps to increment notice counters so that a user gets a sterner message for each overdue notice.

1. Click on the Count as a notice sent checkbox.

You can run your notice reports in “test mode” by keeping the Count as a notice sent checkbox deselected.

If you are running a report in test mode, make sure that when you schedule the report to de-select the “Auto email to recipients” checkbox. Even if the report doesn’t increment the notice counters via “Count as a notice sent”, e-mails can still be sent.

2. Click on the Combine Notices radio button so all user activity is on one notice, regardless of owning or charging library. (This would be useful for a system that had notices going out from a headquarters building.)

3. Click the Library address on notice checkbox to print a return address on the notice. This can be defined as the library sending out the notices or the user’s home library.
4. Select the library sending out the notices from the Select sent from library in the drop-down list box:

5. Fill in any additional checkboxes, include the use of salutations (e.g., Dear Mike Jones) and User IDs:

**Sliding Date Range**

The New Overdue Notices report can notify users incrementally about returning items that are due. Remember that the “Count as a notice sent” checkbox needs to be selected in order for this incremented notification to work.

Follow these steps to set up overdue notice increments:

1. Fill in the Message 1 field. It has a counter (=0) and a notice file (1stoverdue).
When a user has an overdue item and she has never been notified, she will receive the 1st overdue message:

"1ST OVERDUE NOTICE"

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

2. Fill in the Message 2 field. It has a counter listed as well (=1) and another notice file (2ndoverdue).

When a user has already received one message about an overdue item, she will receive the 2nd overdue message:

"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.

3. Fill in the Message 3 field. It has a counter listed as well (=2) and another notice file (3rd overdue).

The next step is to define when the users get these messages.

4. Notice the Date fields to the right of the message fields, which signifies the due date of the items.

5. You will most likely be running the report at regularly scheduled intervals. Since you don’t want to keep changing the due dates, you can use a sliding date range instead.
6. Select the first *Date* gadget.

The first section of the sliding date range is the beginning period of when items are due. Using “Since the beginning of the system”, you are saying that all users will qualify for the first overdue message if they have items due any time from the past and they have never received a notice about them:

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

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.
```

The second option is saying when the date due range should end. Let’s add that now.

7. Select the “Before” radio button within the End Date section.

8. Enter 7 for the number of days.
9. Click OK.

Now you will be taken back to the report. Notice the new Date range that has been applied (:DE-7). It is saying that users whose items are at least seven days overdue will be send the “1stoverdue” message (if they have not received a notice already).

The date range is dependent on when the report runs. In the first example the system is looking, at the time the report runs, for items due at least seven days ago.

10. You’ll want to repeat the same steps for the second and third Date fields.

11. Select the second Date field.
12. Select the “Before” radio button within the End date section.

13. Enter 14 for the number of days ago when items were due.

14. Select OK.
15. You’ll want to repeat the process for the third Date field. If you notify a third time, after items have been due 21 days or longer, you will be sending them the “finaloverdue” message.

   **FINAL NOTICE**

   This is the final overdue notice; we have sent you several notices already.

   If you don’t return the following items we shall take your outstanding account to a collection agency for action.

**Changing Notice Text**

If you are curious about how these notices are worded, you can use the Notice helper to view, and even create, notice text.

1. Select the Notices helper.

2. Select the notice file in question.

   If you do not send users to a collection agency when items are long overdue, the “final overdue” message won’t be appropriate.
3. You can view other messages (e.g., 3rdoverdue) or you can create your own.

Creating a New Notice File

Follow these steps to create a third overdue message:

1. Select Create.

2. Enter a notice file name.

3. Select OK.

4. Enter your notice text.

5. Select Save.

6. A confirmation window will now appear. Select OK.
7. Select **Cancel** to return to the report.

Now you can use the Message 3 gadget to select your new notice file.

1. Select the Message 3 gadget.

2. Use the Notices File drop down arrow to choose the correct file.

3. Now you will see that after an item has been due for 21 days (:DE-21) and after two notices have been sent already (=2), the user will receive the “21dayoverdue” message.
4. You can continue to add messages and date ranges, as well as define what else can print on the notice.

5. Select **Schedule** (Let’s set the report to run daily.)

6. Select the **Daily** radio button.

7. Enter the time the report will run.
Emailing Notices

You can set up your notices to be emailed to users with email addresses in their records.

Follow these steps to email notices:

1. Click the “Auto email to recipients” checkbox.

There is also a Reply to field, which can be used by patrons who wish to respond to a library notice.

2. Select the Schedule button.

Here is an example notice:

Wednesday, February 4, 2009

E. A. Arrowood Foundation Library
101 Washington St.
Huntsville, AL
35801

ID: 210000007

Elizabeth Murphy
8789 That Street
Springville, UT .ZIP 87878

Dear Elizabeth Murphy,

"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.
Farming the waters / Peter R. Limburg.
Limburg, Peter R.
due: 12/3/2008, 23:59
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.
Chapter 7: Session Settings

In this final chapter, we will take a look at the Report Session wizard. These settings apply to all the report wizards.

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

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

The Report Session wizard for reports guides you through the process of configuring specific property-type settings for a range of report wizards during your WorkFlows session. The values in the session settings behave in the same way that wizard properties behave.

The defaults contained in these session settings will be used throughout the wizards on the Reports toolbar.

If no preferred defaults are set at the start of a Reports wizard, the Report Session wizard displays automatically for review.

Setting Session Settings

Follow these steps to set session settings:

1. Select the Report Session wizard.
The first two fields indicate the application used to view and print reports.

2. You might change these fields to Microsoft Excel if you wanted to view pipe-delimited data in that application automatically.

You can now change the application to view reports.

3. Select the Application to view reports gadget.

4. Use your icons to navigate to the appropriate directory. In this example we will go to C:\Program Files\Windows NT\Accessories\wordpad.exe.

5. Select OK.
Setup & Schedule

The **Setup & Schedule** fields affect the behavior of scheduled reports. For example, “Display report source column” will show the source name of each report. This is useful when working with Client Care, as they will be able to recognize “usercnt” over “Linda’s numbers.”

Send Notices Automatically, when selected, will automatically set any reports you schedule thereafter to email notices to your users with email addresses in their user records. This field correlates to the “Auto email to recipients” checkbox you see when scheduling a report.

“Preserve template owner” means that a template owned by CIRC, for example, can be run by ADMIN and still be owned by CIRC as a finished report.
View, Print or Email Finished Reports

This section shows the defaults you will see when viewing your finished reports.

Follow these steps to view, print, or email finished reports:

1. Select “Format report.”

2. You may wish to deselect the “Include log” checkbox. This will allow only the results to appear when viewing a finished report.

3. Keep your “Format report” checkbox selected. There are times where you may wish to deselect it, for example, when you are viewing pipe delimited output in a spreadsheet application like Microsoft Excel.

4. “Display format page” allows you to change formatting on the fly when viewing, printing or emailing reports.
Format Page

Follow these steps to format page length and width, as well as margins, for your reports: (This is especially important for notice text.)

1. Set format page values according to this example:

   ![Format Page Example]

   This example works well for Microsoft Word because it keeps notices from “creeping” to other pages.

2. Fill in the other fields as appropriate.

   Page length refers to the lines that will fit down a page; page width refers to the characters that can fit across a page.

   Refer to the WorkFlows help topic, "When printing notices in WorkFlows, how can I ensure that each notice starts on the first line of the page?" for more information on other suggested format settings.

View, Print, or Email Finished Notice Reports

In this section you will learn to list those notices you wish to display by default when viewing or printing a finished report:

1. Select all recipients:
2. Select printing options:

These same options appear when printing or emailing a finished report:

3. If you are both emailing and printing notices, you could select “Only those with no email addresses” when handling the printing of notices for users who do not have email addresses, which will keep notices from printing for users who have already received their notice by email.

The only time you can specify if a report will email notices is when you are scheduling the report. You’ll need to make sure the “Auto email to recipients” checkbox is selected when scheduling the report. Remember this checkbox correlates to the “Send Notices Automatically” checkbox in the Report Session wizard.

The Email button in the Finished Reports wizard refers to the emailing of the entire list of notices, NOT the emailing of individual notices to individual users.