

8. WORKFLOWS REPORTS

The Symphony WorkFlows client includes a Reports module. In Symphony terminology, "reports" is a broad term that includes counts of records, lists, notices, transaction statistics, and even some maintenance routines.

Count reports give a simple numerical count of the number of records in a file; or the number of records in a file that contain a field with a specified value. An example would be the "Item Count by Home Location" report.

List reports will print out individual records within a file and will include several fields within each record. Often, these records are selected for inclusion on the report by specifying criteria of field values. An example would be the "List Transits From" report, which lists all items currently INTRANSIT from a certain library.

Notice reports are used to inform library users of a pending transaction. Examples include overdue notices, pre-overdue notices, hold pickup notices, and hold cancellation notices.

Transaction statistic reports can provide counts of certain circulation transactions: mainly checkouts and renewals within a specified time period, and offer breakdowns by user criteria or item criteria. An example would be the "Previous Month Circ by Item Home Location" report.

Maintenance routines may provide information that appears a lists or counts; and may also make automatic changes to records. An example would be the "Clean Holds Shelf" report, which will list items on the hold shelf where the pickup date has expired or where the hold has been cancelled. The Clean Holds report will also automatically put items INTRANSIT if they need to go to a different library.

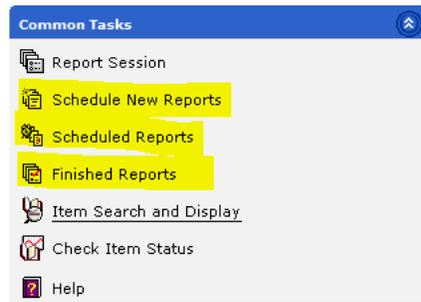
8.1 Reports Module Wizards

The WorkFlows Reports Module consists of three main Wizards: Schedule New Reports; Scheduled Reports; and Finished Reports.

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

Scheduled Reports lists the reports that someone has already set up to be run automatically on a certain schedule. **NOTE:** When a report listed in Schedule New Reports is set up to run as a Scheduled Report, that Scheduled Report then exists as a separate report routine—with report selection criteria that existed at the time it was scheduled. Therefore modifying or deleting a Scheduled Report does not modify or delete a Schedule New Report (and vice versa).

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



Each of these wizards offers lists of reports AND includes an option to delete or remove. Because these lists are shared by everyone within a library that uses the same login credentials, ***you should NOT delete or remove anything in Schedule New Reports or Scheduled Reports that you did not create.*** You can and should remove Finished Reports, once you are sure that no one at your library would need to see or use those results again.

8.2 Reports Module in CIRC login profiles (vs. ANSER login profiles)

In the ANSER network, each library has most staff logging in with a generic ...CIRC login. This login has been set to provide access within the Reports module to a limited number of reports that have been pre-configured to provide the most requested types of reports.

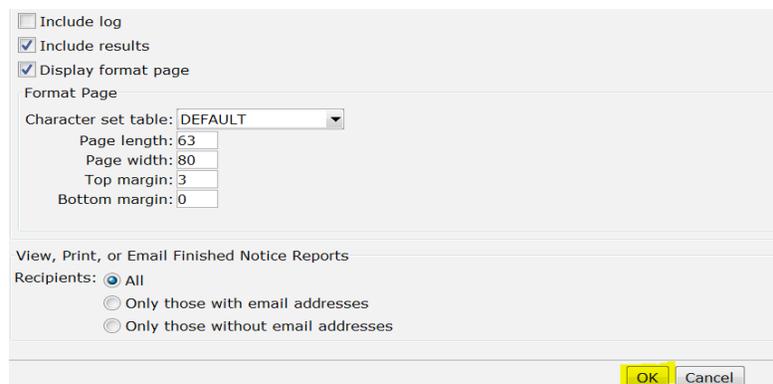
Report name »
WARWICK: 14/30 day Overdue Notices
WARWICK: 5/30 day Overdue Notices
WARWICK: All LOST Items
WARWICK: All MISSING Items
WARWICK: All old (90+ days) unfilled Holds
WARWICK: All older on-order, tech services Items
WARWICK: Cash Report Per Workstation
WARWICK: Clean Holds Shelf
WARWICK: Dusty Book (adjust Home Location) 3 years inactive
WARWICK: Failed SVA Calls Notices
WARWICK: Final notices via email
WARWICK: Hold Shelf List
WARWICK: Inactive Users 5 years
WARWICK: Inactive Users 6-plus years
WARWICK: List Checkouts Claims Returned
WARWICK: List Holds Cancelled (past 2 weeks)
WARWICK: List older INTRANSIT items owned
WARWICK: List Transits From
WARWICK: List Transits To
WARWICK: Notify Via PAPER Hold Pickup Notices
WARWICK: Previous Quarter LOST Items
WARWICK: Previous Quarter MISSING Items
WARWICK: Purchase Alert
WARWICK: Purchase Alert 2 (0 copies)

These reports already have many criteria defined within the report to specify a certain library, item location, time period, user inactivity, hold ratios, item due dates, etc. Because those criteria are pre-defined, they do not need to be adjusted, and the report can just be set to run (on demand or scheduled automatically).

Note that few of the listed reports available to ...CIRC logins are Statistical reports. We have set up the ...ANSER login assigned to each library (for use by Directors and ANSER Contacts) to include pre-configured statistical reports.

8.3 Reports Module Session Defaults

ANSER has adjusted the Reports module so that use of any of the main Report Module wizards first requires a user to click OK from the Report Session defaults screen. Unlike other Wizards, the Report Session defaults may occasionally need to be viewed and/or adjusted for troubleshooting purposes (for instance, if a new model of printer is installed; or if a Windows XP machine is replaced with a Windows 7 machine). Those adjustments should only be made after consulting with the ANSER Help Desk. Normally, users will just skip past the defaults by clicking the OK button at the bottom of the Defaults screen.



The screenshot shows a dialog box titled "Report Session Defaults". It has a close button in the top right corner. The dialog contains the following options and settings:

- Include log
- Include results
- Display format page
- Format Page
 - Character set table: DEFAULT (dropdown menu)
 - Page length: 63
 - Page width: 80
 - Top margin: 3
 - Bottom margin: 0
- View, Print, or Email Finished Notice Reports
 - Recipients: All
 - Only those with email addresses
 - Only those without email addresses

At the bottom right, there are "OK" and "Cancel" buttons. The "OK" button is highlighted with a yellow background.

The WorkFlows Reports module has session default settings that can determine which text viewer program will automatically open text reports and which XML viewer program will automatically open XML reports. These viewer programs are separate from WorkFlows itself.

For a text viewer, ANSER recommends use of Wordpad or Word. For XML viewing, ANSER recommends Microsoft Excel.

The Session Defaults are set to identify the file path location of those viewer programs on each particular workstation. That path may differ from machine to machine, depending on whether the machine is using Windows XP or Windows 7; and whether it has Microsoft Office installed.

The Session Defaults also define Format page widths, lengths, and margins. These settings have been custom-adjusted on many workstations to enable proper notice printing spacing. The settings vary depending on Windows version and printer make and model. **DO NOT ADJUST FORMAT PAGE SETTINGS WITHOUT CONTACTING ANSER SUPPORT.**

Application to view reports: C:\Program Files\Windows NT\Accessori...
Application to print reports: C:\Program Files\Windows NT\Accessori...
Application to view XML reports: C:\Program Files (x86)\Microsoft Office\...

Setup & Schedule

Display report source column
 Notify owner when report is finished
 Send notices automatically
 Preserve template owner
 Allow entering email address in Reply To field

View, Print, or Email Finished Reports

Format report
 Include log
 Include results
 Display format page

Format Page

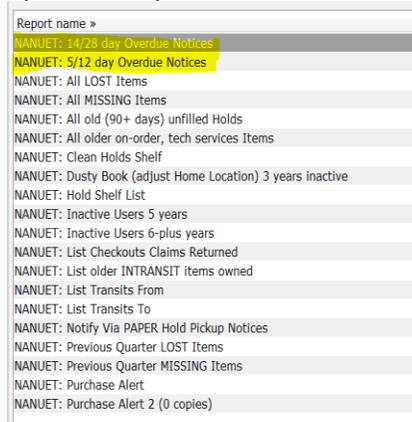
Character set table: DEFAULT

Page length: 63
Page width: 80
Top margin: 3
Bottom margin: 0

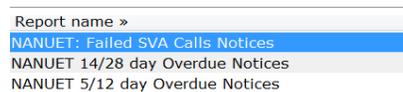
[Note: the page length, width, and margins in the screen image example above may not match those that have been set for your workstation.]

8.4 Schedule New Reports – Template Reports (in CIRC login profiles)

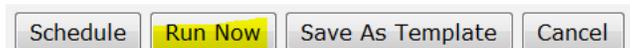
Reports have been set up for ANSER Library staff by first creating defined Template reports. The, after the Template reports were created, some of those reports were then scheduled to run automatically—which created copies of the Template reports. For example, Nanuet’s Template Reports include the following:



The two highlighted reports are for overdue notices, and were set up as Scheduled Reports. Their Scheduled reports wizard screen lists those:



Most of the Template reports are not Scheduled to run automatically; they need to be run by staff as needed. To run a report, highlight it on the list and then click on the Setup & Schedule button. Then click on “Run Now”.



The Template reports include:

Clean Holds Shelf report – *this report should be run and reviewed as soon as possible after running it every day your library is open.* The Cleans Holds Shelf report lists items on your hold shelf that were not picked up in time or which were cancelled by the patron. If any of these items needs to go to another library, the Clean Holds Shelf report automatically puts them INTRANSIT.

Your staff should be taking any item listed on the report off the hold shelf and should discharge it on a workstation with a receipt printer attached. Discharging the items will produce Transit slips (if needed) or a new Hold slip (if there were further holds for pickup at your library).

Hold Shelf List – This is an optional report that you may want to run occasionally. It lists all items that the system believes are on your holds shelf, either active and awaiting pickup or inactive due to pickup by date expired or hold cancelled. If you cannot locate all items listed on the report, you should checkout the missing items to your xxxMISSING user.

All LOST Items – A list of all items owned by a library that have a Current Location of LOST-ASSUM or LOST-CLAIM. LOST-ASSUM are items that had been checked out to users until they became so overdue they were declared lost. LOST-CLAIM are items that had been checked out to users that the users reported as having Lost. If a LOST-ASSUM or LOST-CLAIM item has an unpaid bill associated with it, it cannot be deleted.

RCLSHQ will attempt to batch delete LOST-ASSUM and LOST-CLAIM older than 2 years, but the batch delete also will not delete items with unpaid bills.

Libraries would use this report to make replacement acquisition decisions and/or to delete item records before the 2-year period used by RCLS.

All MISSING Items – A list of all items owned by a library that have a Current Location of MISSING. MISSING items are items which were not found on the shelves (when the shelves were listed as the Current Location). If a MISSING item has an unpaid bill associated with it, it cannot be deleted; items set to MISSING by checking them out to your library's nnnMISSING user cannot be deleted without first checking the item barcode in.

RCLSHQ will attempt to batch delete MISSING items older than 2 years, but the batch delete also will not delete items with unpaid bills. The batch delete will be able to delete MISSING items checked out to your nnnMISSING user.

Libraries would use this report to make replacement acquisition decisions and/or to delete item records before the 2-year period used by RCLS.

Previous Quarter LOST Items and **Previous Quarter MISSING Items** are reports intended to assist in tracking down these items. Libraries should be running these reports every three months or so and searching the shelves from the call number. If found, the items should be discharged to clear the Lost or Missing location.

All older on-order, tech services items – This report list all your items that have been set to AVAIL-SOON, CATALOGING, INPROCESS, or ON-ORDER locations for more than 90 days. In some cases these may represent on-order item records you created with a dummy barcode, which later was not deleted or changed to a real barcode. In other cases these may be items that you ordered, but are still on backorder from a book vendor for some reason. Whatever the reason is, these items need to be deleted or investigated.

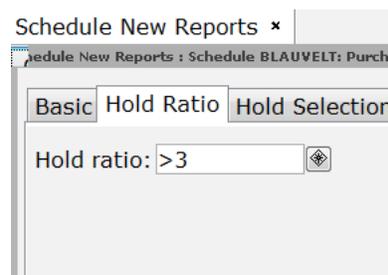
All old (90 days+) unfilled holds – This list, sorted by title, will include all hold requests with your library as the pickup location that were placed 90 or more days ago. In some cases these requests were placed on on-order items that are still on-order, or were just recently received and still have a long hold queue. However, in other cases the request is taking too long to fill because there are no longer any available copies in the system or because too few libraries own copies compared to the number of people on the hold queue. RCLSHQ reviews the old hold requests twice a year (in Feb. and Aug.) and will cancel requests in cases where no available copies are left in the system. This report is designed so that you might see these titles before we cancel the requests and decide whether you would want to order a copy; or place the request on a different edition of the same title; or obtain the title through ILL outside of ANSER.

List old INTRANSITS owned, List Transits From, and List Transits To are all designed to locate items that are listed as being INTRANSIT, but have been set to that Current Location for longer than 14 days. The whereabouts of these items is unknown. Use the reports to search your shelves for these items; if your library owns them, they may have been put back on the shelves without being discharged; if owned by another library, they may have been put on your shelves instead of into deliveries. The owning library should check out the oldest INTRANSIT items that cannot be found to their nnnMISSING user.

Note that the WorkFlows List Transits From and List Transits To reports do not indicate the Home Location of the items, only their call numbers. If your call numbers are not specific to a particular Home Location, you may want to use WebReporter to generate the Transit From and Transit To reports. WebReporter Transit reports will indicate the Home Location.

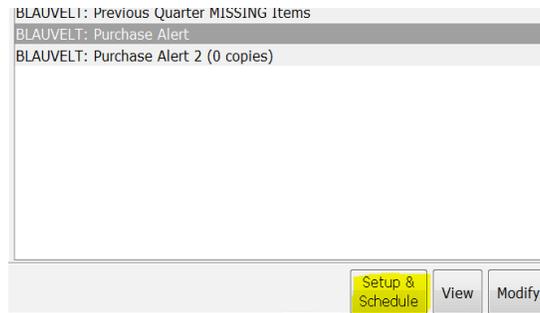
List Checkouts Claims Returned – A report, sorted by call number, of items owned by your library that patrons have claimed to have returned. This report should be used to check the shelves. If the shelves have been checked, older items on this report should be checked out to you nnnMISSING user (which will remove them from the user’s list of checkouts; however, the user will still have a Claims returned counter increment in their user record.)

Purchase Alert and **Purchase Alert 2** are reports that list titles which have been requested for pickup at your library, where the number of requests exceeds the number of copies by a certain ratio. In the **Purchase Alert** report, the default ratio of requests/owned copies is set at >3, but libraries may want to adjust that ratio higher or lower. A lasting adjustment would be done by using the Modify button in Schedule New Reports with that report selected; then adjust the “Hold ratio” field in the Hold Ratio tab of the report definition:



The **Purchase Alert 2** is similar to the Purchase Alert report, but will list titles where your library owns 0 copies. Therefore the **Purchase Alert 2** report is especially useful in helping to spot titles where you are over-relying on other ANSER libraries to provide copies for your patrons.

Any modification you make using Modify would change the Schedule New Report template for other users at your library. If you would like to make a *temporary* change to a report definition that would not be stored for others, use the Setup & Schedule button:



Make your adjustment, then click on Run Now.

Inactive Users 5 years and **Inactive Users 6-plus years** are optional reports you may wish to run that list your patrons that have not been checking out physical items or Overdrive items for many years. RCLSHQ will perform an annual purge of inactive patrons based on ANSER policy criteria; prior to that purge, RCLS would make sure that these reports are run for you.

List User Profile Mismatches -- This report will produce a list of patrons with your library listed as their registration library, but with a User Profile that isn't one that was set up for your library. Either the Library is wrong or the User Profile is wrong.
--Most often, the user profile is what is incorrect (you see it in the User Record as a string of asterisks). A patron moved from a different library district, you gave them a card (with your barcode), but the user profile was not adjusted. Adjust the user profile to one of your profiles.
--The library may be incorrect if the patron's address and barcode indicate that their card was issued by another library. Correct the Library to match their address/barcode.

Dusty Book report lists your items that have not circulated in a specified period. The default Home location and inactivity period can be adjusted in the report definition. **NOTE:** the Dusty Book report and other item list reports can be generated via the WorkFlows report module; however, dusty and item list reports generated via WebReporter will include more fields than the WorkFlows reports offer—and WebReporter reports are more easily exported to Excel for easy formatting, re-sorting, and printing. Contact ANSER software support for help running item reports in WebReporter.

Active User LIST reports and **Bill Payment reports** are also best done in WebReporter for the same reasons: ease of exporting to Excel, re-sorting within Excel, and easier printing. Contact ANSER software support for help running user reports in WebReporter.

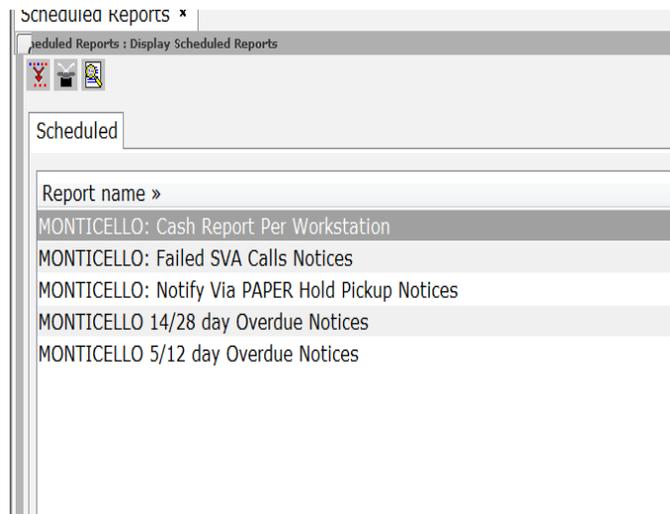
Cash Report Per Workstation is an optional report that some libraries have requested. It lists bills paid at specified workstations at your library for the previous day. In order to collect this information, those workstations must be assigned a specific station ID; and that ID must be designated at the time that WorkFlows is logged in.

Overdue Notices are listed in Template Reports, but are never run manually. Instead they are run automatically as Scheduled Reports on a daily basis. If they are ever accidentally deleted in Scheduled Reports, they could easily be set up again from these templates. When Overdue Notice reports are run, they progress a counter in the Symphony checkout record that indicates that a user has been sent a notice. This prevents the same patron from being sent more than one (first, second, etc.) notice for the same checkout. However, that counter also makes it impossible to manually run the same notices if a Finished Overdue Notice report is deleted before it is printed.

8.5 Scheduled Reports (in CIRC login profiles)

Daily notice reports for overdue items, Failed SVA Calls (failed robocalls for hold notification, if a library is using robocalls), and Notify via PAPER Hold notices have all been set by RCLSHQ to automatically run on a daily basis (including days your library is closed).

You should see these reports listed in your nnnCIRC login's Reports Module, Scheduled Reports wizard:



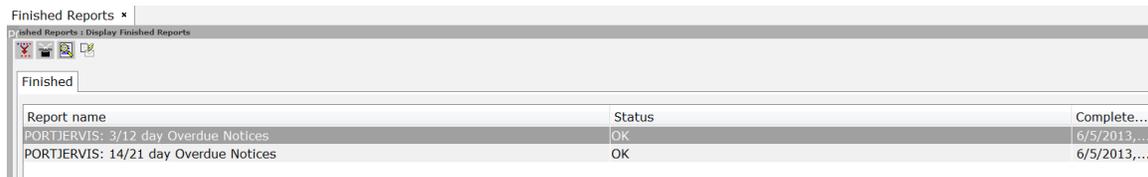
[If you do not see these, someone at your library removed the Scheduled Reports in error; they will not be run automatically. Call ANSER Software Support to have them re-created.]

Optionally, some libraries have requested a daily **Cash Report Per Workstation** report; or have set the **Purchase Alert** or **Purchase Alert 2** to run on a weekly basis.

No staff person should Modify, Remove, or Suspend any listed Scheduled Reports without approval of the library's ANSER contact. *Normally, there would be no need for any staff person to open the Scheduled Reports wizard.*

8.6 Finished Reports (in CIRC login profiles)

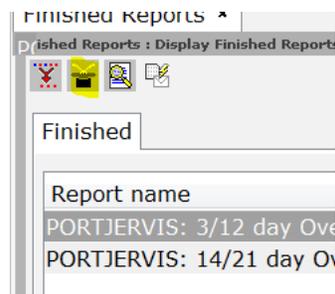
When a report is run (immediately via Schedule New Reports or automatically via Scheduled Reports), the results are listed in the Finished Reports wizard.



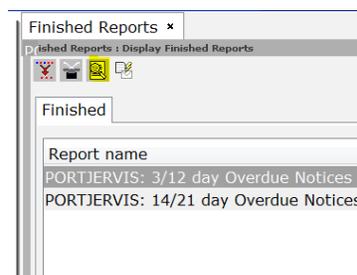
Report name	Status	Complete...
PORTJERVIS: 3/12 day Overdue Notices	OK	6/5/2013,...
PORTJERVIS: 14/21 day Overdue Notices	OK	6/5/2013,...

The ANSER Symphony system is set during the day to execute 2 reports at a time for all libraries (including the system administrators at RCLS). Depending on the report you are running and how many other reports may exist in the system-wide report queue, it may take anywhere from 30 seconds to 5-10 minutes for a report to appear in Finished Reports.

The Finished Reports screen does not refresh the onscreen list automatically as reports complete. You either have to close and re-open the Finished Reports wizard OR use the Refresh Report List helper (the rabbit in the hat icon).



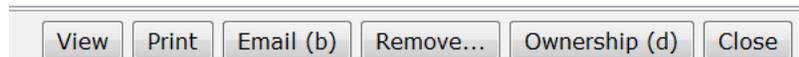
To see if your report is currently running, use the Report Scheduler Status helper.



Note that the Report Scheduler Status popup would only list the one or two reports currently being processed—your report may be further

down in the scheduler, but would not be displayed. Be patient; if you have set a report running, but it is not listed in Finished reports and there are two other reports being executed in the Report Scheduler status display, do NOT try to re-run your report. If it is not listed in Finished reports and no reports are listed in the Scheduler Status popup, call ANSER software report.

You can View (and Print) Finished reports from the button at the bottom of the Finished Reports screen.



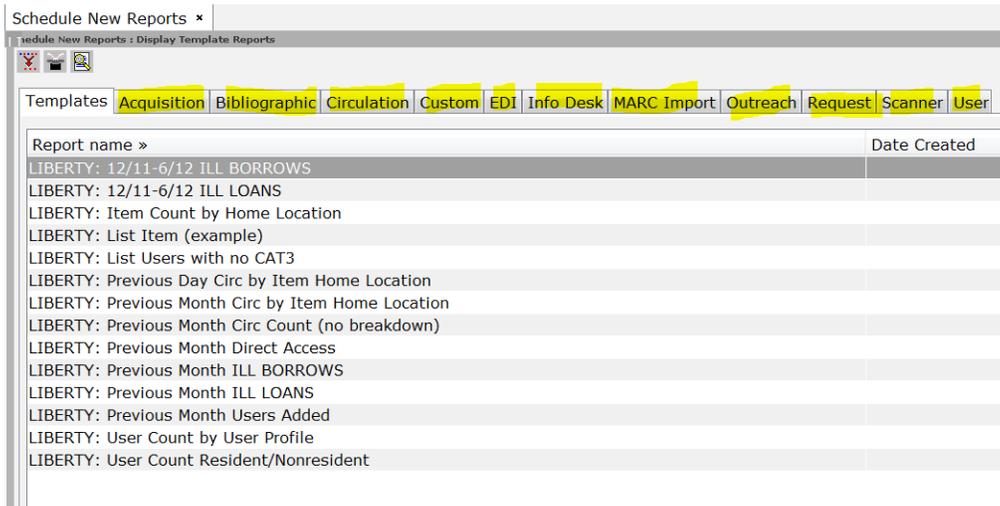
We recommend you use View for onscreen viewing and printing. [The Print button is mainly a vestige from the days of dedicated impact printers]. For text reports, onscreen viewing and printing are both done via WordPad. For XML reports, the View command will invoke Excel. Note that the reports available as Templates to nnnCIRC logins are all set by default as text report output, not XML.

Some reports may format properly if you try to email them; but reports with wide rows of fields or large grids will not align properly in the body of an email. The Email button would be used to send an entire report to another staff person; it is not used to email patrons (notice reports do that automatically).

Do NOT change the login Ownership of a report; doing so will cause that report to not be available to anyone using your current nnnCIRC login.

8.7 Schedule New Reports – (in nnnANSER login profiles)

The Reports module of theANSER login includes a Template folder of pre-configured statistical reports; but also includes folders of un-configured reports that would require adjustment of report settings—adjustments that should be done by a trained user.



The pre-configured template reports include the reports needed for State Annual Reports and other statistical reports most requested by ANSER library directors and department heads:

Item Count by Home Location report – offers a count of your libraries items by their home (shelf) location. The report is configured so that it would NOT include items set to a Home or Current location of DISCARD. This gives a current snapshot count; it is not possible to run this retrospectively to get a count of items as of a previous date. This report must be run as close as possible to the end of your State Annual Report reporting year.

User Count by Resident/Nonresident report – This report offers a current snapshot of user records belonging to your library broken down by User Cat 1: Resident and Nonresident values. (If the user record had no User Cat 1 value, or a value of ILL, it would not be counted). It is not possible to run this retrospectively to get a count of users as of a previous date. This report must be run as close as possible to the end of your State Annual Report reporting year.

User Count by User Profile report – This report offers a current snapshot of user records belonging to your library broken down by user

profile: nnnADULT, nnnYOUTH, nnnSTAFF, etc. It is not possible to run this retrospectively to get a count of users as of a previous date. If the report includes user profiles set up for other libraries, then some error exists in a user record in either the Library field or the User Profile field. These could be identified with a **List User Profile Mismatch** report in the nnnCIRC login Reports

[Date-Date] ILL BORROWS – This report is prefigured to select checkout and renewal counts of items owned by other libraries that were done at your library between the configured dates. These dates change as needed to cover your State Annual Report reporting year. The report is configured to only include checkouts/renewals to patrons with a User Cat 1 of RESIDENT, NONRESIDENT or UNKNOWN (this excludes any checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc).

[Date-Date] ILL LOANS– This report is prefigured to select checkout and renewal counts of items owned by your library that were done at other libraries between the configured dates. These dates change as needed to cover your State Annual Report reporting year. The report is configured to only include checkouts/renewals to patrons with a User Cat 1 of RESIDENT, NONRESIDENT or UNKNOWN (this excludes any checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc).

*One report NOT seen in Templates of the nnnANSER login is **Previous Year Circ by State Categories**. This report, needed for the State Annual Report, is very computational resource-intensive; therefore it is run just once a year for each library by ANSER software support staff at RCLS.*

Previous Month Users Added – This count report looks for user records that were created during the previous calendar month. Since it offers no breakdown of that count, the result appears within the **report log** itself:

```
352102 user record(s) considered.  
27 user record(s) selected.  
Symphony user selection finished on Monday, June 10, 2013, 3:16  
PM  
Symphony userstatus selection 3.4.1 started on Monday, June 10,  
2013, 3:16 PM  
The user key will be read from standard input.
```

```
The user key will be written to standard output.  
Users will be selected if library group is ALL  
27 userstatus record(s) considered.  
27 userstatus record(s) selected.  
Symphony userstatus selection finished on Monday, June 10, 2013,  
3:16 PM
```

This report does not indicate the number of user records deleted; and would not count any user records created and then deleted within the same month. It is configured to exclude any user records like nnnMISSING created for internal library use.

PREVIOUS MONTH ILL BORROWS – This report is prefigured to select checkout and renewal counts of items owned by other libraries that were done at your library during the previous calendar month. The report is configured to only include checkouts/renewals to patrons with a User Cat 1 of RESIDENT, NONRESIDENT or UNKNOWN (this excludes any checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc).

PREVIOUS MONTH ILL LOANS– This report is prefigured to select checkout and renewal counts of items owned by your library that were done at other libraries during the previous calendar month. The report is configured to only include checkouts/renewals to patrons with a User Cat 1 of RESIDENT, NONRESIDENT or UNKNOWN (this excludes any checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc).

PREVIOUS MONTH DIRECT ACCESS -- This report is prefigured to select checkouts and renewals that were conducted at your library for users registered at all libraries during the previous calendar month. It breaks down those counts by the user's registration library. The report is configured to only include checkouts/renewals to patrons with a User Cat 1 of RESIDENT, NONRESIDENT or UNKNOWN (this excludes any checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc).

PREVIOUS MONTH CIRC (NO BREAKDOWN) – reports on checkouts/renewals done at your library the previous calendar month (excludes any checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc).

PREVIOUS MONTH CIRC BY ITEM HOME LOCATION – reports on checkouts/renewals done at your library the previous calendar month, broken down by the item home location (excludes any

checkouts/renewals you do to special internal use users like nnnMISSING, nnnREPAIR, etc). Note that all ANSER libraries work from the same list of home locations, but some locations are only used by a few libraries; which means that you may see small counts for home locations not used by your library, but which were used on items that came to your library via E-ILL.

PREVIOUS DAY CIRC BY ITEM HOME LOCATION – same as above, except for previous calendar day.

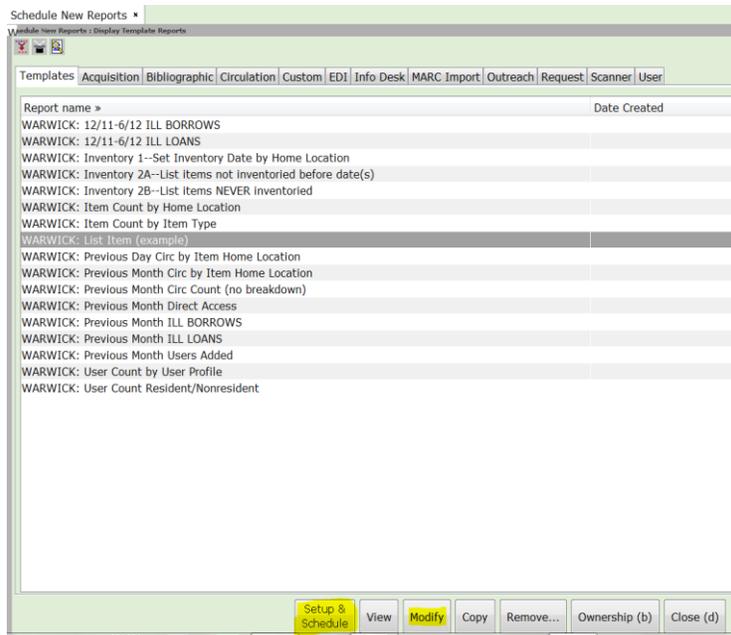
LIST ITEM (example) – The List Item report can be used to generate lists of items that match criteria that you would define: Home Location, Item Type, Current Location, Item Cat 1, Item Cat 2, date (created, last activity, last charged, last inventoried). The resulting report can be output as formatted text, pipe delimited, or XML.

However, many libraries have found that the WorkFlows item reports do not include fields they would like to see; or are hard to manipulate in Excel because of the style sheet that is imposed. For this reason, many item list reports are better accomplished by running WebReporter items reports (in the Custom RCLS folder in WebReporter).

8.7 Modifying Report Variables

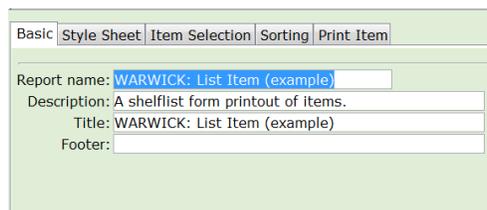
Nearly all the template reports have been pre-set with user criteria, item criteria, or date criteria that should **not** be changed from their set values without checking with ANSER Software Support staff at RCLS.

However, template reports that include the label “example” or “sample” may be modified. **List Item (example)** is one such report. Report criteria can be permanently modified using the Modify button on the list of template reports. Report criteria can be temporarily modified for one instance using the Setup & Schedule button:



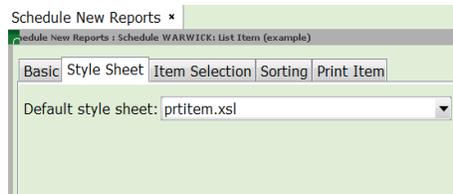
Both Modify and Setup & Schedule allow modification of the report criteria. The only difference between those options is that Modify just allows changing the report criteria, but does not present any options to immediately Run or Schedule the report for a future run.

All reports have a Basic Tab:



The Report Name is how the report is listed within WorkFlows. The Description can be an explanation of how the report is used—this description only appears in this Basic Tab screen. The Title gets printed on the Report as a header. Optionally, you could place a Footer on each page of the resulting report.

A Style Sheet tab will appear only on reports that offer XML output format as an option. XML format reports can be displayed in Microsoft Excel, but the style sheet will lock in the Excel layout design. ANSER currently has only the one style sheet setting delivered by SirsiDynix, so there is no choice of a different style sheet. It will not matter if you select it or not; it will be used by default.



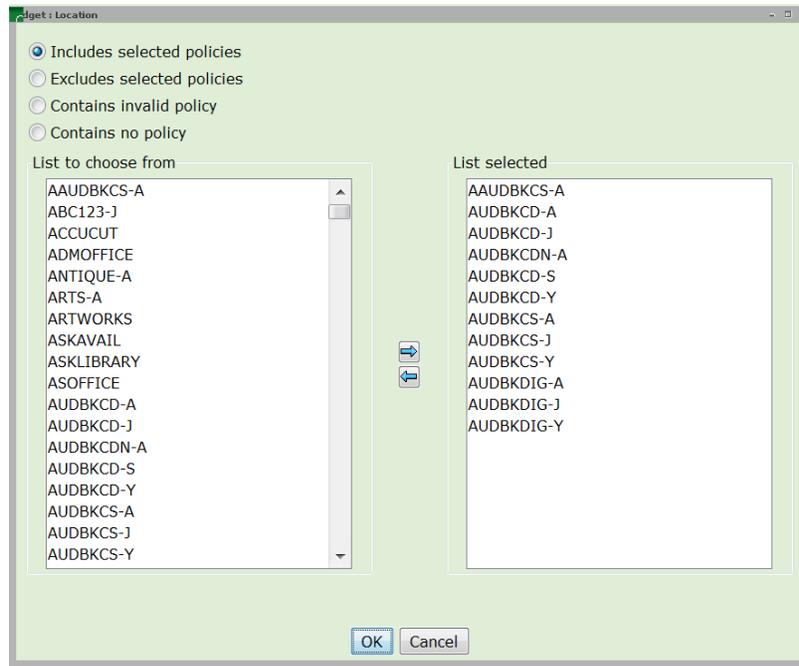
The Item Selection (or User Selection) tabs offer many field criteria selection options:

 A screenshot of the "Schedule New Reports" window, showing the "Item Selection" tab. The form contains the following fields and options:

- Library: WARWICK
- Home location: AAUDBKCS-A|AUDBKCD-A|
- Current location: (empty)
- Item type: (empty)
- Item category 1: (empty)
- Item category 2: (empty)
- Permanent: Yes No Both
- Circulate: Yes No Both
- Extended info: (empty)
- blank field matches with Not Equal qualifier
- In the shadow catalog: Yes No Both
- Accountable: Yes No Both
- Number of pieces: (empty)
- Date created: (empty)
- Last activity date: (empty)
- Distribution key: (empty)
- Date last charged: (empty)
- Date last discharged: (empty)
- Date inventoried: (empty)
- Number of times inventoried: (empty)
- Number of charges: (empty)
- Number of total charges: (empty)
- Number of inhouse charges: (empty)
- Number of copy holds: (empty)
- Available on hold: Yes No Both
- Number of bills: (empty)
- Price: (empty)

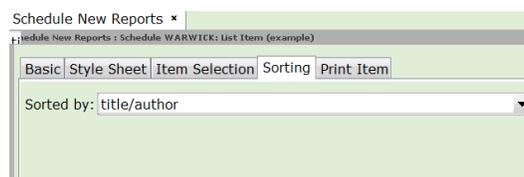
Item reports should *always* be limited to your library (in the above example, the reported will be limited to items owned by Warwick.) Frequently, libraries would want to have these reports limited by item home location or by item type. In both those situations, the selection

criteria would be adjusted by clicking on the gadget to the right of those fields:



Those gadgets present a selection mechanism where you would select a value on the left and then click on the right arrow to move that option over to the right. In the example above, all the home locations used for different types of audiobooks have been selected.

The Sorting Tab will control the order in which items (or users) are listed on the resulting finished report. Item reports can be sorted by Title/Author, call number, or key (barcode).



The Print Item tab displays for reports that print bibliographic information in the report output. The following Print Item tab options may or may not be available, depending on the report.

- [Output format for printed reports](#)
- [Printed Arrangement](#)
- [Record Per Page](#)
- [Shadow Filtering](#)

The Print Item tab also includes the following types of selections.

- [Title Information Output Selections](#) shows title level information, including the information to be included in the bibliographic display.
- [Call Number Information Output Selections](#) shows call number level information, including bound-with information.
- [Item Information Output Selections](#) displays circulation and inventory statistics, bills, charges, and holds information.
- [Copy Accountability Information Output Selections](#) lists charge and copy level accountability information.
- [Title Accountability Information Output Selections](#) shows title and bibliographic classification and restriction information.
- [MARC Holdings Information Output Selections](#) displays the MARC holdings information with a variety of format variations, and limited by library and/or by location.

Output format for printed reports

The printed report data can display in one of three formats:

Standard

The report data displays in a plain text format. The report log lists the report file name.

Pipe Delimited

The report data is saved in a file in which every entry is delimited by pipes (|). The data can then be exported to a third-party application, such as a spreadsheet application. The report log lists the report file name.

XML

The report data is saved in a visually enhanced text format (EXtensible Markup Language) which can be set to open in Excel. The report log lists the report file name.

Printed Arrangement

Item information may be arranged in the report output. Select one of the following options to determine how the item information in the report output is to be arranged.

Catalog Shelflist

The catalog shelflist 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.

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

Record Per Page

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.

Shadow Filtering

Shadowed information is usually unavailable to public users, and is used primarily by library staff. The Shadow Filtering options allow you to control whether shadowed information is to print in the report output. Select one of the following options.

Public Items

Prints only public information.

Shadowed Items

Prints only shadowed information.

Public and Shadowed

Prints both public and shadowed information.

Note: If the Record by Record printed arrangement option is selected, all of the Shadow Filtering options are disabled.

If you do not want shadowed items to display at all, select Public Items.

If the No Call Number Information option and No Copy Information option are selected when the Catalog Shelflist printed arrangement option is selected, only bibliographic information displays for shadowed titles. However, if the call number or copy are shadowed, item information is also printed.