



Traverse des Sioux Library System

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2/12/2010jd

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Reports in WorkFlows

From your *TECH* logins, you have access to dozens of reports that can be modified for your library. In addition, the report templates listed below are available for copying under the *REPT* login. Please copy and rename the report, using your 3-letter library code instead of the *XXX*. Then replace the *TZT* value in the reports with your library symbol. Give ownership to your *TECH* or *CIRC* login. Detailed procedures follow.

Circ Stats Report Templates

- XXX circ to my users at other libs:** monthly count of charges your patrons have made at other libraries.
- XXX circ by user lib monthly:** monthly count of charges in your library from other patrons in the region.
- XXX circ by item owner monthly:** monthly count of charges at your library, listed by home library of the item.
- XXX items circ'd at other libs:** monthly count of your items that were charged at other libraries to fulfill holds.
- XXX monthly circ total by item type:** monthly count of charged items, listed by item type.
- XXX monthly circ total by item cat2:** monthly count of charged items, listed by age category for each item type.
- XXX monthly circ total by cat1/cat2:** monthly count of charged items, output by item cat 1 and item cat 2.
- XXX count holds filled monthly:** Counts how many holds were picked up at your library monthly.
- XXX bill totals by bill reason:** Dollar amount owed to the library by bill reason. (Does not include fines for items not yet returned.) Limiting by amount or bill reason doesn't work. Use report below for that info.
- XXX count bills:** Use to get a count of the number of bills. Can limit by dollar amount, bill reason, etc.
- XXX list items with bills:** *Items* with bills, based on selection criteria. Includes both item and patron barcodes.
- XXX list items with PALS bills:** *Items* with bills from the old PALS system.
- XXX daily circ stats jd:** Circ stats for previous day. Can select output with column/row.
- XXX circulation by zipcode:** Counts circ charges & renewals by patron's zip code. Also counts in-house use and intransits.
- XXX Yearly Circ Stats template:** Can modify yearly date range, and column/row output as needed for circ stats.
- XXX Yearly circ of my items circ'd at other libs:** yearly count of your items that were charged at other libraries.
- XXX Yearly circ to my users at other libs:** yearly count of charges your patrons have made at other libraries.
- XXX in-house user browse stats:** Counts circs of "*Mark Item Used*" wizard.

User Information

- XXX users added monthly:** monthly count of users registered monthly, by user category 1.
- XXX count users:** total count of current users (cards expiring after Dec. 31, 2005).
- XXX list users:** All-purpose report that lists users based on user profile, user category, privilege expiration, etc.
- XXX List users BARRED:** Lists users with a status of barred.
- XXX current user statistics:** Counts users—with row & column output.

Item Information

- XXX count items:** total count of each barcoded items.
- XXX count item titles (long run time):** total count of bib record titles for your library.
- XXX list items:** All-purpose report that lists any items based on item type, location, item cat 1 or 2, etc.
- XXX list items in STACKS:** Lists items that have a location of STACKS. Useful for item cleanup.
- XXX list items MISSING:** Lists items that have a current location of MISSING.
- XXX item statistics:** Counts items—with row & column output.
- XXX list items for colltn dev pipe-d:** pipe-delimited format that can be imported into EXCEL for collection development purposes, including weeding. Includes number of circs, price, year of publication, and date added to the collection. Template can be modified to select different item categories or item types.

Copying reports from REPT

The instructions below assume basic knowledge of WorkFlows functionality. If you do not know how to do any of the steps listed below, please contact the Traverse des Sioux office.

- Login to WorkFlows as REPT.
- Select the Reports Toolbar.
- Click the *Schedule reports* wizard.
- Highlight the report you wish to copy.
- Click the *copy* button at the bottom of the screen.
- The report window will open. In the blue bar across the top, it will say *Schedule new reports: Schedule (name of the report you are copying)*
- On the *Basic* tab, change report name and report title from XXX to the 3-letter code for your library.
- Click each tab of the report, replacing any value of TZT with the code for your library, using the “gadget” button next to the field. (Remember to scroll down the page so you don’t miss a field!) Click OK to close gadget selection box.
- Click OK button at the bottom of the screen to save the copied report.

Next you must change ownership of your copied report from REPT to your TECH or CIRC login, following the steps below.

- While still logged in with REPT, under the *Schedule reports* wizard, highlight your newly created report template, as copied above.
- Click the *Ownership* button at the bottom of the screen. A small box will open.
- The “owner” button is selected. Click the down arrow button and select the login you wish to have the ownership of the report from the drop-down list. If you do not see your TECH login listed, click the “Other” button, immediately below the “owner” button. This will change the lower field from gray to white, and you can type in your XXXTECH login.
[Note: Only logins that have scheduled reports appear on the drop-down list. This is OK. Just select the “other” button, and type in your TECH login.]
- Click OK.
- When you are done copying reports and giving ownership to your TECH login, close WorkFlows. Then, open WorkFlows again, logging in with your TECH login.

Scheduling Monthly Reports

The transaction date range on the TdS custom report templates are set to provide statistics for the previous month. The value shown in the transaction date range field will be: M-1:ME-1. The system will adjust the report to reflect stats for the entire month, no matter how many days are in that particular month. Also, The report does *not* have to be scheduled to run on the 1st each month to gather stats for the previous month. If you run the report on November 10th, it will reflect stats for the period of Oct. 1 through Oct. 31st.

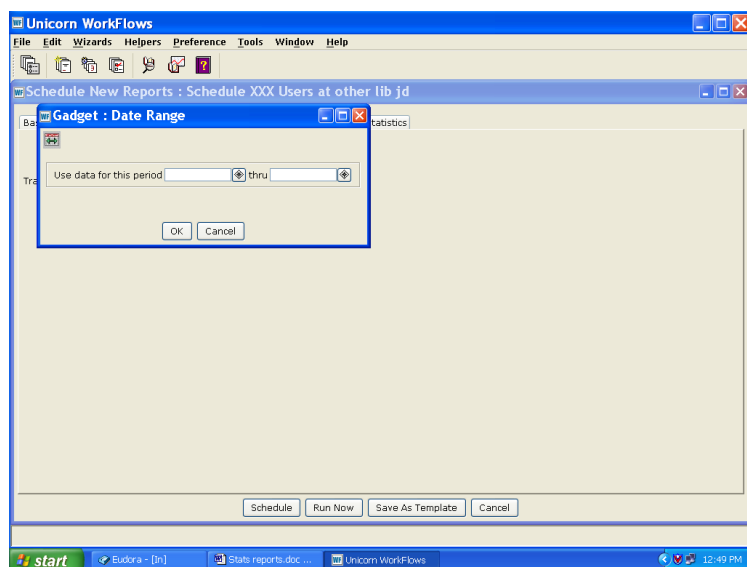
To schedule monthly reports, follow the steps below. Please watch carefully to make sure the calendar gadget reflects the days of the week that are checked are on the right side of the screen.

- From the Reports toolbar, click on the *Schedule New Reports* wizard.
- Highlight the report you wish to schedule on an on-going basis.
- Click the *Setup and Schedule* button at the bottom of the screen.
- The report window will open. In the blue bar across the top, it will say *Schedule new reports: Schedule (name of the report you are scheduling)*
- Click the *Schedule* button at the bottom of the screen.
- Click the round button for “monthly”.
- A “Days of the month” calendar appears. Note that today’s date is checkmarked. Advance the monthly calendar below the words “Start running on...” to the month you wish to start. Click the date on the calendar that you wish to start running the report. Note that when you do so, a checkmark appears on the “Days of the month” calendar to the left. Uncheck any days of the month that are erroneously checked.
- On the time field below the calendar, set the hour and minute that you want to run the report. [*Note: Schedule bibliographic, call number, list types of reports between 8:00 p.m. to 10:30 p.m. or 5:00 a.m. to 7:00 a.m. It is OK to run most “count” type of reports during the day-time hours, with the exception of bib record counts.*]
- Click *Schedule*.
- A box will appear that asks whether you want to go to Schedule New Reports, Display Scheduled Reports, Display Finished Reports, or Close. Select *Scheduled* to verify that you have scheduled the report for the time you wish it to run.
- Click *Close* if the report is scheduled as expected. If not, click *Advanced*, then *Reschedule*, and try one more time.

Modifying Transaction Date Range

To get statistical reports for months you may have missed or deleted, you can modify the transaction date range of an existing report and re-run it.

- From the Reports toolbar, click the *Schedule Reports* wizard.
- Highlight the report you want to work with.
- Click the *Setup & Schedule* button at the bottom of the screen.
- The report window will open. In the blue bar across the top, it will say *Schedule new reports: Schedule (name of the report you are scheduling)*
- [opt.: Click the *Basic* tab to add the month to the report title and/or name.]
- Look for the *Transaction Selection* tab and/or the field labeled *transaction date range*.
- Click the gadget next to the transaction date range field.
- The date range gadget will open.
- In the upper left hand corner, click on the small calendar icon.
- This is what you'll see.



- Click the gadget next to the 1st blank field and select your beginning date. Click OK.
- Click the gadget next to the 2nd blank field and select your end date. Click OK.
- Click OK to close the window.
- Click on the button *Run Now* at the bottom of the screen.
- If no other system reports are running, this report should appear in the Finished Reports list within a minute or two. If it takes longer than 30 minutes to appear, please contact the TdS office. Your report (or someone else's) may have "hung" and will need to be stopped at sirsi.net.