



Reports

Rel. 3.5

Contents

Contents

| | |
|----------------------------------|---|
| Types of Reports..... | 3 |
| Monthly statistical reports..... | 3 |
| Management reports..... | 3 |
| Emailed Reports..... | 3 |
| Accessing Reports..... | 4 |
| View..... | 5 |
| Print..... | 6 |
| Email..... | 6 |
| Error messages..... | 7 |
| Special Reports..... | 8 |

Types of Reports

There are several categories of reports that are automatically run on a regular basis for libraries:

Monthly statistical reports – Count of items sent to other libraries to fill requests, count of items received from other libraries to fill your users requests, total number of items checked out by item category, total number of items checked out by patron category, total number of items cataloged in the previous month.

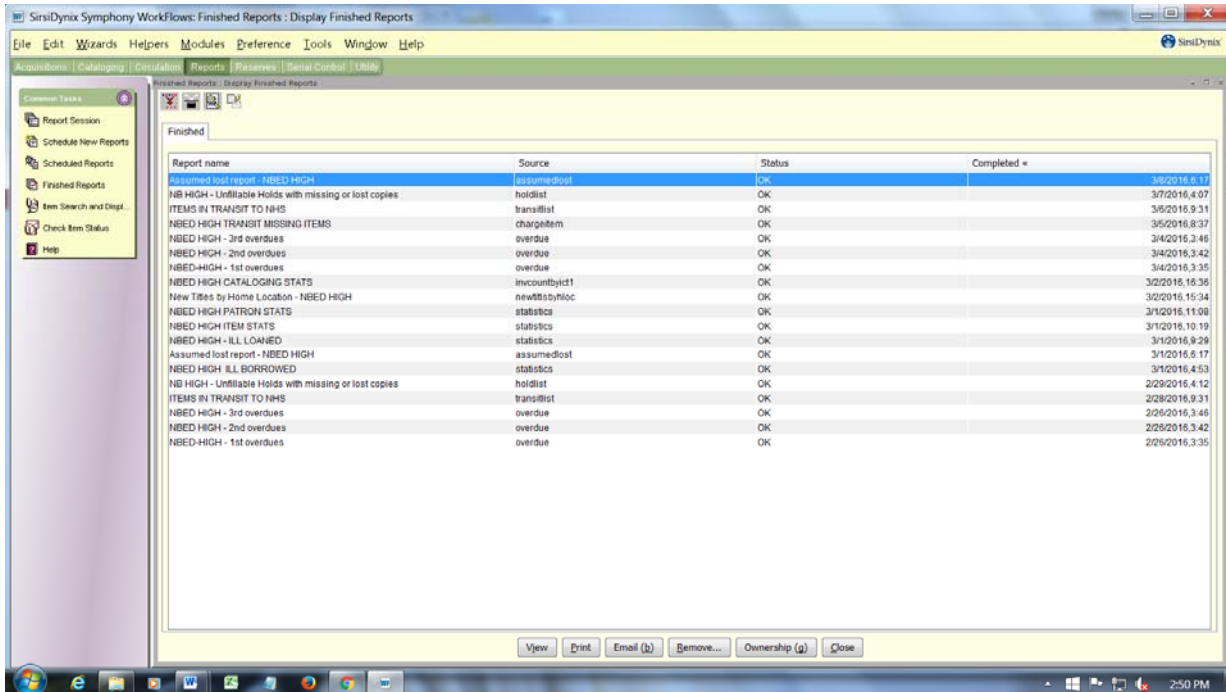
Management reports – Overdue reports (1st, 2nd, and 3rd notices). Assumed Lost reports – notices that tell users items are so overdue that they are set to Lost. Items at least two week in transit to the library. Items at least two weeks in transit from the library. Holds on titles where all copies are either missing or lost.

Emailed Reports – Reports that are email directly to a member of the library staff (requests for items on shelf to fill other library's holds) or overdue/hold pickup notices for users providing an email is their record.

Accessing Reports

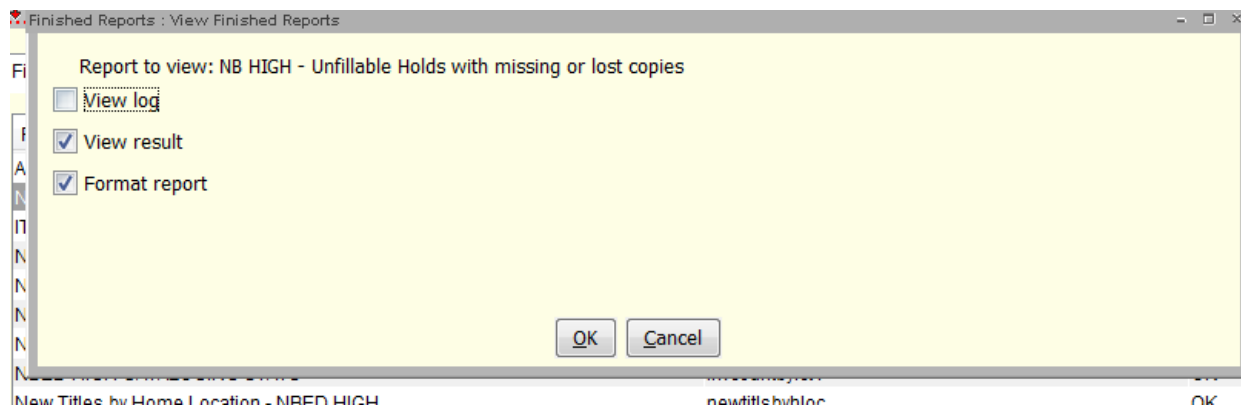
Only the SAILS network can create and schedule reports for libraries. Staff may only view reports generated for their own library. Finished reports remain for viewing for 14 days. Any report may be viewed and saved as a document or emailed to a staff person.

To view reports Click on the Reports tab and then Click on Finished Reports



View

The View option allows the staff person to see the report results without printing them. Click on View. A box will pop up. Uncheck the View Log option



The finished report will open up in Office or Notepad. It can be read or screen or sent to the printer.

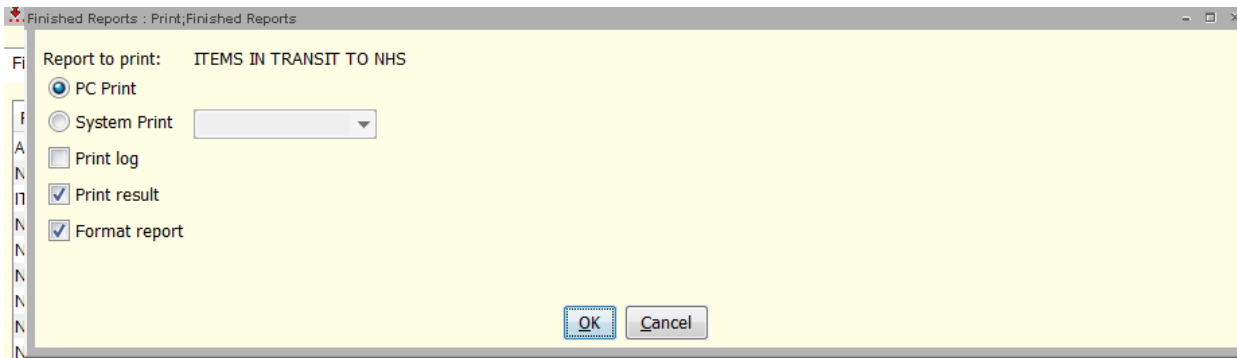
ITEMS IN TRANSIT TO NEW BEDFORD HIGH

Produced Sunday, February 28, 2016 at 9:31 AM

| TO | FROM | DATE | REASON |
|--|------------|-----------------|---------|
| DVD INTO | copy:1 | 32039008763625 | |
| Into the wild [videorecording] / Paramount Vantage and River Road Entertainment present a Square One C.I.H./Linson Film production ; produced by Art Linson, Sean Penn, William Pohlada ; screenplay by Sean Penn ; directed by Sean Penn. Linson, Art. | | | |
| NBED-HIGH | NBED-LAWLR | 6/14/2011,12:55 | HOLD |
| FIC LEE | copy:9 | 39066000022596 | |
| To kill a mockingbird / by Harper Lee. Lee, Harper. | | | |
| NBED-HIGH | SEEKONK-PL | 10/2/2012,2:37 | LIBRARY |
| DEATH NOTE V8 | copy:1 | 33574100094866 | |
| Death note. Vol. 8, Target / story by Tsugumi Ohba ; art by Takeshi Obata ; [translation & adaptation, Tetsuichiro Miyaki ; touch-up art & lettering, Gia Cam Luc]. *Oba, Tsugumi. | | | |
| NBED-HIGH | REHOBOTH | 3/20/2013,15:58 | HOLD |

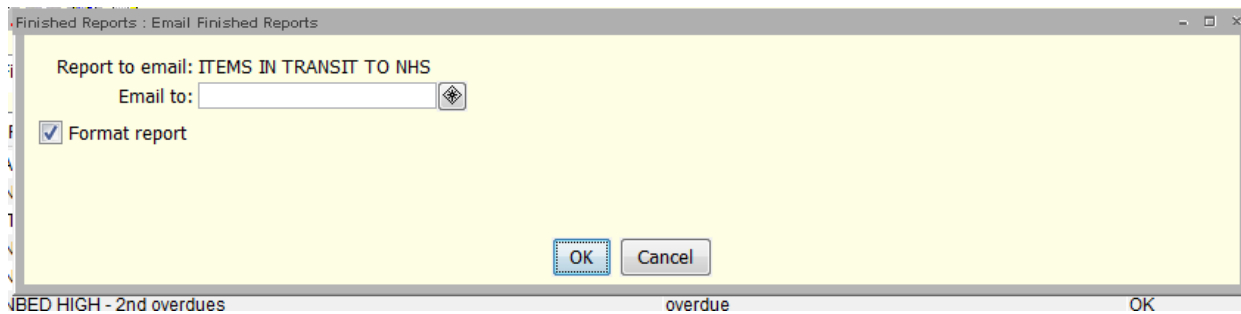
Print

Click on the Print option to send the report results directly to the printer attached to the computer.

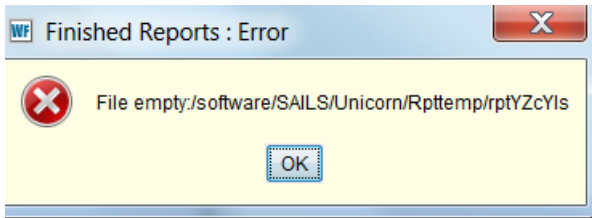


Email

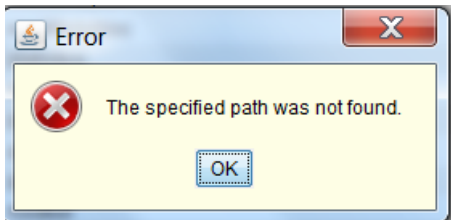
This sends the report results to an email address entered by the staff person.



Error messages



This screen means there are no report results to be viewed.



This means your properties need to be updated to find the software you want to use to view and/or print your reports.

Special Reports

The system produces a report called the RHA. This is a report of titles owned by your library that are being requested by other libraries. This report will be emailed to you. You should print the report that is generated the day before your delivery pickup. Go through your shelves and select items that are being requested. Once you have collected the items being requested you may use the Trap Holds Wizard under the Holds set of options – scan each item. The system will tell you to whom it should go. If your item does not have a barcode on the outside you must use a transit slip (see <http://guides.masslibsystem.org/routesinformation>) All the libraries in SAILS are in the Southeast Delivery system. You must use a preprinted slip. See the sample report below. It lists each title. It is sorted by home location. It lists the library to whom the item should be shipped. If you are unable to locate an item you must check it out to Missing using the Mark Item Missing option under the ITEMS set of wizards.

HOLD PICKUP LIST

Produced Wed Mar 9 13:07:28 2016

Library: WRNTHAM-RS

F WAG (AUDIO CD)

Warner, Gertrude Chandler, 1890-1979

The Boxcar children [sound recording] / Gertrude Chandler Warner

copy:1 item ID:35899010123440 type:CDBOOK location:AUDIOBK

Pickup library:MARION Date of discharge:11/23/2015

B BRU

Bruschi, Tedy

Never give up : my stroke, my recovery, and my return to the NFL / Ted

copy:1 item ID:35899901122345 type:BOOK location:BIOG

Pickup library:FOXBORO Date of discharge:02/23/2016

B GAN

Diemer, Lauren

Gandhi / by Lauren Diemer

copy:1 item ID:35899901131429 type:BOOK location:BIOG

Pickup library:BERKLEY Date of discharge:03/02/2016

F BAR

Barrie, J. M. (James Matthew), 1860-1937

Peter Pan

copy:1 item ID:35899000377212 type:PBK location:FICTION

Pickup library:NO_ATBORO Date of discharge:10/09/2015

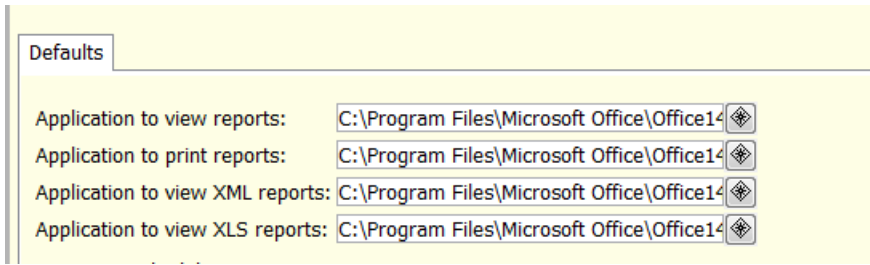
Printing and viewing reports

Changing the default program

When Workflows is first installed on a computer you must select a default program to view and print the reports. The first time you click on Reports go to the the Report Session Tab.

1. In the **Reports** module, under Common Tasks, click the **Report Session** icon.

To the right of **Application to print reports**, use the gadget to search for the application you want to use to view and print reports. The example below sets the application to Office. You may choose Excel to view XML and XLS reports.



3. Click **OK**.

Setting the dimensions of the paper

1. Go to the **Reports** module.

2. Under the **Common Tasks** group so wizards, click **Report Sessions**.

3. In the resulting screen, enter the following numbers:

| | |
|---------------|----|
| Page length | 57 |
| Page width | 80 |
| Top margin | 0 |
| Bottom margin | 0 |

4. Click **OK**. You may need to do some testing on these dimensions to make sure you don't have page creep.