Report printing set-up

Templates

The template specifies the fields to be displayed in the result file (Displayed Fields) and the fields on which conditions can be applied (Filter Fields). Templates can be used over and over again.

Reports

This process is commonly known as defining a report, running a report or setting up a report. The process schedules the report's run-time and frequency (one time only or on a regular basis), selects the output file format(s) and designates who will received email completion notifications when the report is finished. The information provided during this step is saved in a file called "Report" on Evergreen. This file contains the template information **and** the value for each filter.

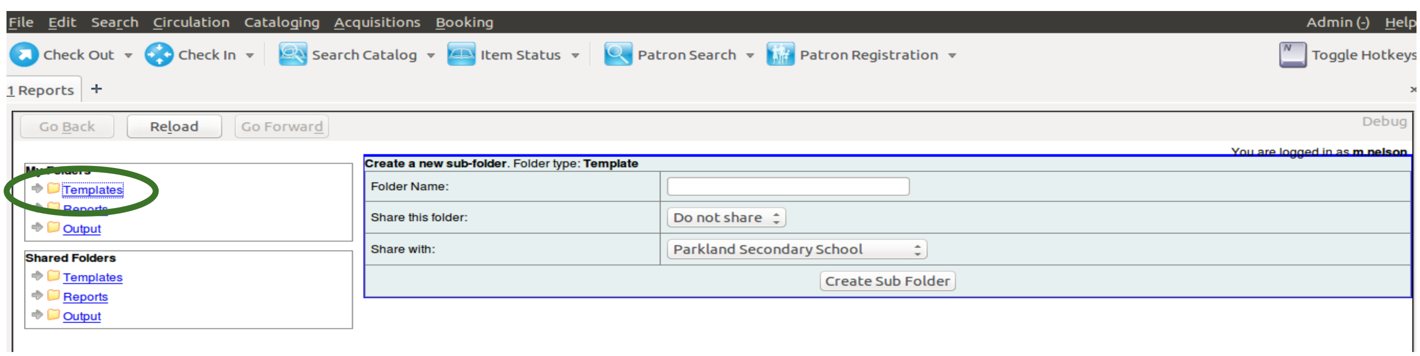
Output

When a report starts to run, the program goes through the database and gathers the records that meet the conditions specified in the template into a file in the selected format(s). This is the Output file that contains the result records.

Set-up

First, you must create at least one *Template*, *Report*, and *Output* folder. You can have as many subfolders as you need and can name them in any way that works for you.

1. Click on *Admin* > *Local Admin* > *Reports*



2. Click on Templates in the My Folders section.

3. Fill in your folder information:

   Folder name: Items out
   Share this folder: Share
   Share with: Your school

4. Click *Create Sub Folder*, and then *OK* on the confirmation prompt
5. Repeat this process to create a Reports subfolder and an Output subfolder
   a. Click on Reports, title will pre-populate, click OK
   b. Click on Output, title will pre-populate, click OK

Cloning and modifying templates

You can clone templates from any of the template folders.
Most of the templates you will need can be found in Megan's *All Shared Templates* and if you can't find it there, try the custom templates Sitka has created for us.

Under *Shared Folders*

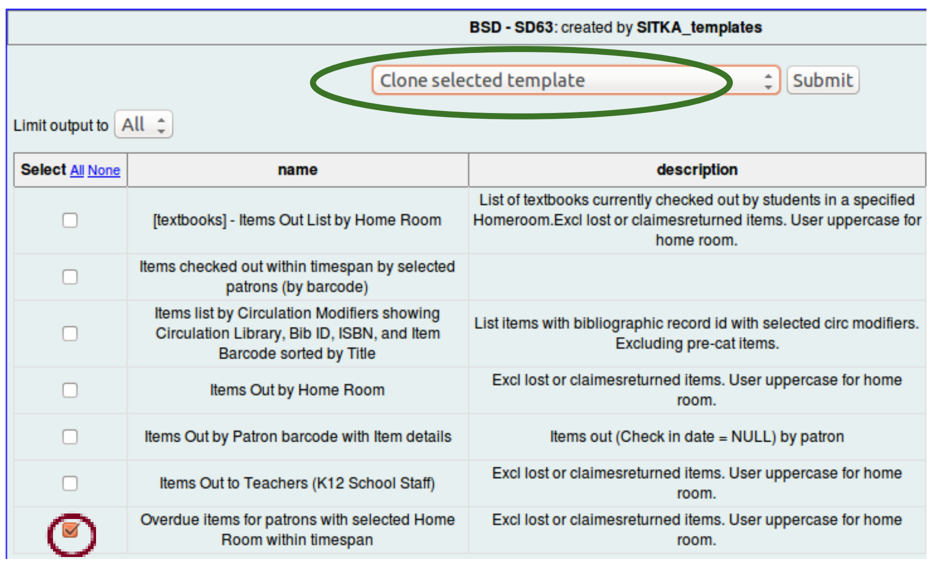
click on the arrows beside *Templates > m.nelson*
then click on <u>All Shared Templates (BSD)</u>

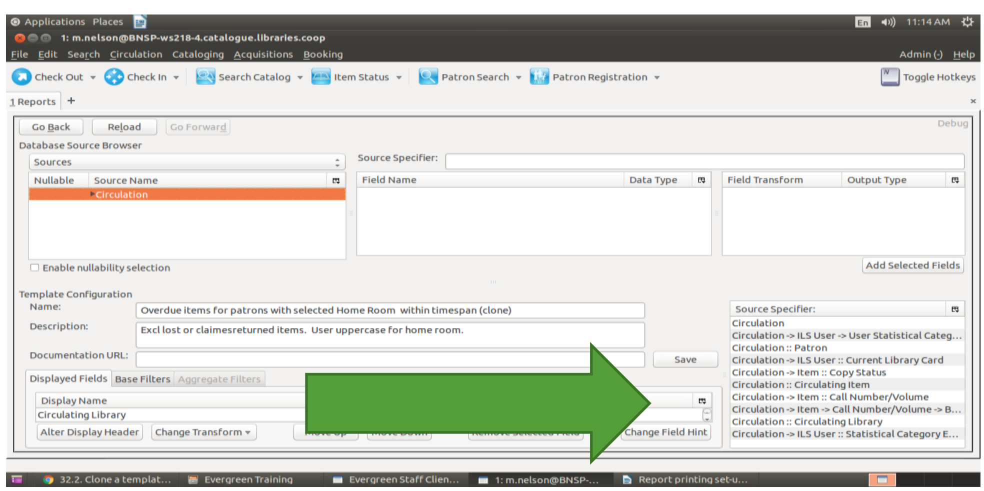
OR

click on the arrows beside *Templates > Sitka Templates > Custom Templates (SITKA)*
then click on <u>*BSD – SD63 (BSD)*</u>

To clone a template:

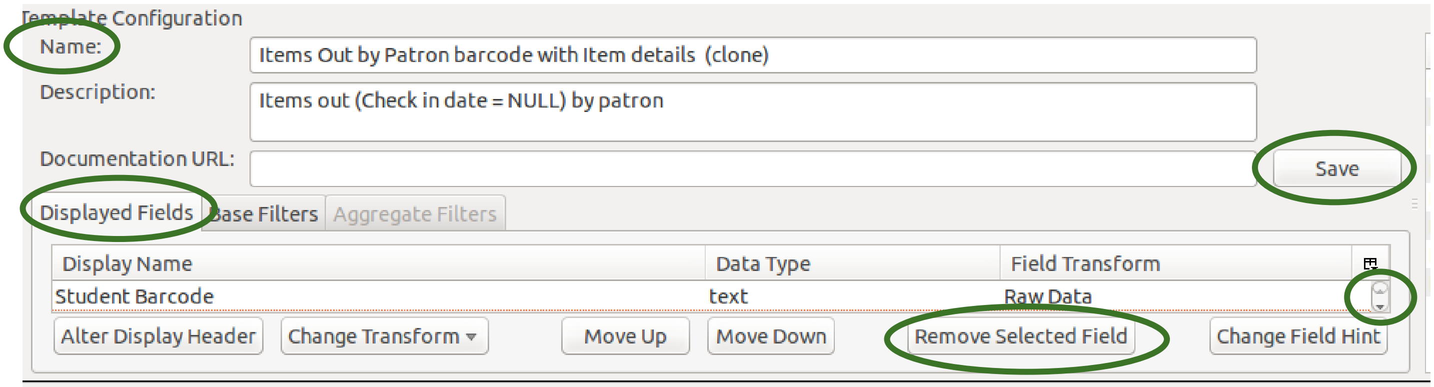
1. Click in the box beside the template name to select it. (*ex. All Items out for whole school*)
2. From the drop-down menu at the top, select *Clone selected template.*
3. Click *Submit*
4. Click on the folder where you want to store the template –*Items Out*
5. Click Select Folder
6. A new window will open with an overview of your new template. You can change the name, add a description or modify the template (see *Modifying a template* below)
7. Click Save. Then click OK in the next two pop-up windows.





Modifying a template

1. In the *Template Configuration* section, you can change the name of your template or update the description



2. Click on D*isplayed Fields* tab to see which fields will display in your report
    - Depending on your monitor display, this could be a very small area. Use the areas on the right side of the box to move up and down

3. To remove a field, click on the row to select it and click *Remove Selected Field*

4. The fields show in the order they appear in the report. Change the order by clicking on the row to select it and then click *Move Up* or *Move Down*

Creating a new report and viewing output

Creating or 'running' a report for the first time

1. In *My Folders*, click on the **arrow** beside *Templates*
2. Click on the folder sub-title - ex. <u>*Items Out*</u>
3. Click in the box beside the template (*All items out for the whole school)*
4. (From the drop-down menu, choose *Create a new report from selected template)*
5. Click *Submit*

Your new report will open.

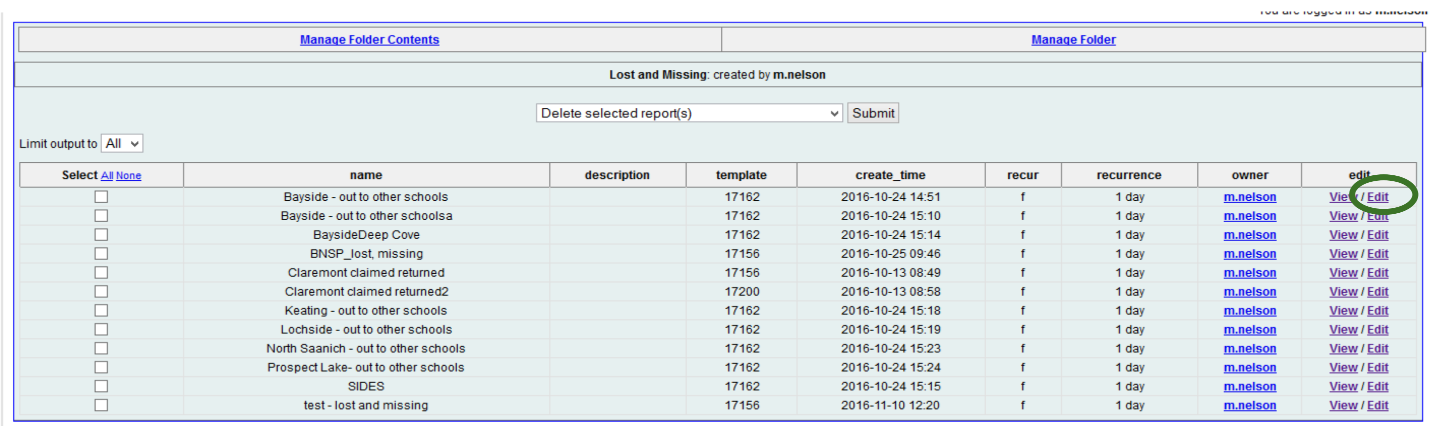
1. Enter a name for your report (ie Overdues for Div 13-Sept. 21)
2. Choose a folder to store the report definition – *Items Out*
3. Enter your report information (ex. Homeroom codes, patron barcode, etc.)
4. Enter your email address if you want to receive an email report or remove email address if not
5. Choose a folder to store report output to – *Items Out*
6. Click *Save Report*, then click *OK* in the popup window.

Running a report you have already created – changing the homeroom, running 'on demand'

Once you have created a report from a template, you can edit the report to make small changes rather than creating it from the template again.
For example;

- You want to run a weekly report for items out for book exchanges but you need to run it 'on-demand' after the items have been returned (rather than as a recurring report)
- You want to run the same type of report for a few different homerooms

1. In *My Folders*, click on the **arrow** beside *Reports*
2. Click on the folder sub-title – ex. <u>*Items Out*</u>
3. Click on *Edit* at the far right of the page, beside the report you want to run again



Manage Folder Contents | Manage Folder

Lost and Missing: created by **m.nelson**

Delete selected report(s) Submit

Limit output to All

Select All None	name	description	template	create_time	recur	recurrence	owner	edit
☐	Bayside - out to other schools		17162	2016-10-24 14:51	f	1 day	m.nelson	View / Edit
☐	Bayside - out to other schoolsa		17162	2016-10-24 15:10	f	1 day	m.nelson	View / Edit
☐	BaysideDeep Cove		17162	2016-10-24 15:14	f	1 day	m.nelson	View / Edit
☐	BNSP_lost, missing		17156	2016-10-25 09:46	f	1 day	m.nelson	View / Edit
☐	Claremont claimed returned		17156	2016-10-13 08:49	f	1 day	m.nelson	View / Edit
☐	Claremont claimed returned2		17200	2016-10-13 08:58	f	1 day	m.nelson	View / Edit
☐	Keating - out to other schools		17162	2016-10-24 15:18	f	1 day	m.nelson	View / Edit
☐	Lochside - out to other schools		17162	2016-10-24 15:19	f	1 day	m.nelson	View / Edit
☐	North Saanich - out to other schools		17162	2016-10-24 15:23	f	1 day	m.nelson	View / Edit
☐	Prospect Lake- out to other schools		17162	2016-10-24 15:24	f	1 day	m.nelson	View / Edit
☐	SIDES		17162	2016-10-24 15:15	f	1 day	m.nelson	View / Edit
☐	test - lost and missing		17156	2016-11-10 12:20	f	1 day	m.nelson	View / Edit

4. Change the name of the report. **This is important as it will not save otherwise.**
5. Make any other changes you wish
6. Click *Save as New*

Viewing Report Output

1. Under *My Folders*, click on the arrow beside *Output*
2. Click on your subfolder (*Items Out)*
3. It sometimes takes a moment for the report output to show up, click on the folder name again to reload if it is taking a while
4. Click in the box beside the report you want to view (*Overdues for Div 13-Sept. 21)*
3. Choose *View Output Report* from the drop-down menu and then click *Submit*
4. Choose how to view your report
   - <u>Excel output</u> – creates a Libre Office Calc spreadsheet which you can save, makes changes to, print, etc
   - <u>Tabular output</u> – shows report on your screen but this version is not editable, can print by clicking *Print Page* at top right.

Tabular Output printing

If you are printing from the tabular output page, you may need to make changes to the printer margins and scale.

1. Click on *Admin* > *Workstation admin* > *Printer settings editor*
2. Click on *Page Settings*
3. Click the *Margins & Header/ Footer* tab to adjust margins
4. Click the *Format & Options* tab to change the scale and the orientation

Specific types of reports

Shared template folders

Items out

Items out - all items that are currently checked out (does not include Lost or Damaged items)
Items out and lost – items that are currently checked out AND lost items

Can be generated by patron(s), by homeroom(s), or for the entire school

Lost and Missing

Lost items- by homeroom, whole school, by statistical category (year of graduation, international student)

Status reports – for listing items with a specific status (Lost, Missing, Damaged) within a time frame, by a statistical category, from other schools

Overdues

Overdue – items which became overdue within a time span: by homeroom, for whole school, by statistical category (year of graduation, international)

- Choose a time span between two dates. For example, if you want a list of everything that is overdue for this school year, you would choose September 9, 2016 as your first date and today's date as your second date.
- For all overdue items ever, choose **1900-01-01** as your first date and today's date as the second date.
    - **One-time reports** - choose *Real Date* from the drop-down menu
    - **Recurring reports** - choose *Relative Date* (see instructions for Recurring Reports)

Overdue and lost – items which became overdue or were changed to Lost before today's date: by homeroom and for whole school

Patron Lists

List of patrons by grad year, by homeroom(s) – does not include items checked out, just a list of people

Reading History

List of items checked out to a patron within a time span

Title List

List of titles: with a copy note, by shelving location, with a selected MARC tag (ie 595 – local note), with a selected value in a MARC tag (ie 690 First Nations), Value of Collection

Other details

Homeroom Codes (Primary identification)

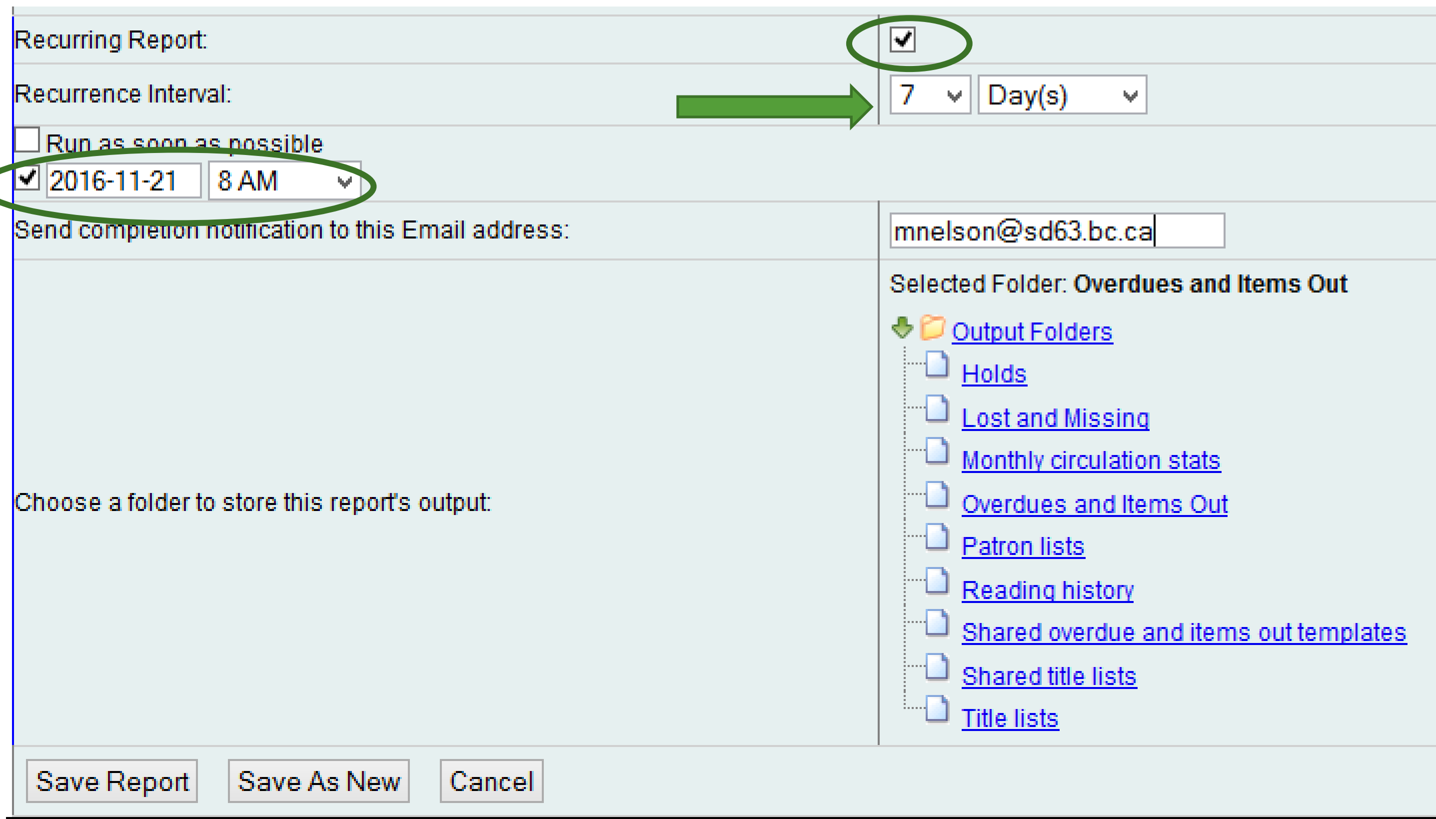
Reports that are filtered by homeroom code - add the homeroom code with school prefix in the field that says:

Circulation -> Patron -> Primary Identification *ie* BNSP22, BSSTLIM, BBBA63, etc.

Recurring reports

To make the report you are creating a recurring report:

1. Click in the *Recurring Report* checkbox
2. Set your recurrence interval using the drop-down menus
3. Click in the box beside the date boxes and enter the first date and time you would like the report to run.
4. Enter you email address to receive an email with a link to open your report output
5. Click *Save as New*
6. **If you need to edit your recurring report, click *Save As*. This is different than when you are editing a one-time report.**



Recurring Reports - Relative dates vs Real dates

If your recurring reports have date ranges in them, the dates need to be set up as 'relative' to the date when the report is run.

For example if you want to run a weekly report of all overdues, you need to choose a relative date of 7 days ago up to a relative day of 1 day ago.