

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. *Items Out*
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.

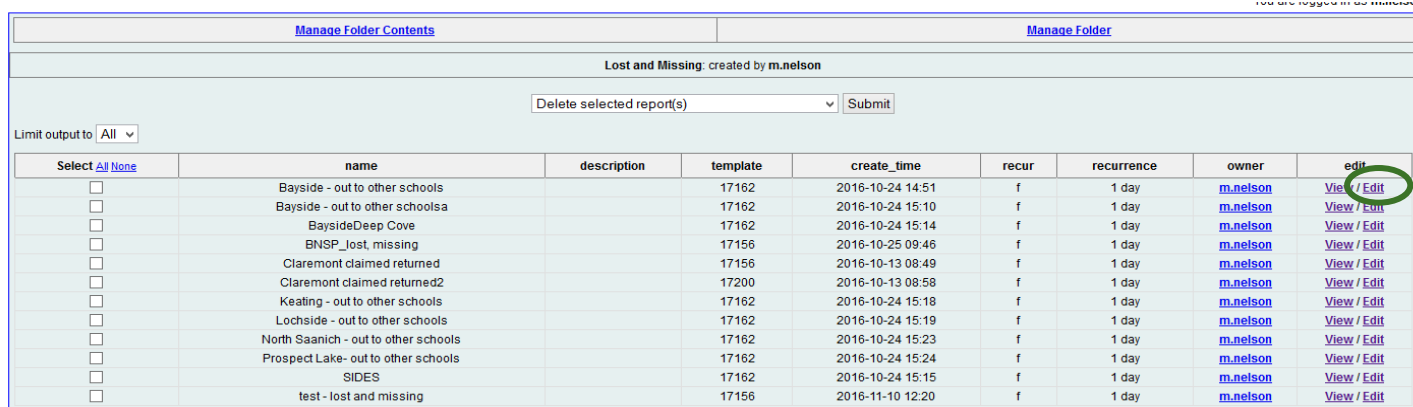
Running a report you have already created – changing the homeroom, running 'on demand'

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. *Items Out*
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) [v] Submit

Limit output to: All [v]

Select	All	None	name	description	template	create_time	recur	recurrence	owner	edit
<input type="checkbox"/>			Bayside - out to other schools		17162	2016-10-24 14:51	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			Bayside - out to other schoolsa		17162	2016-10-24 15:10	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			BaysideDeep Cove		17162	2016-10-24 15:14	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			BNSP_Just missing		17156	2016-10-25 09:46	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			Claremont claimed returned		17156	2016-10-13 08:49	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			Claremont claimed returned2		17200	2016-10-13 08:58	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			Keating - out to other schools		17162	2016-10-24 15:18	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			Lochside - out to other schools		17162	2016-10-24 15:19	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			North Saanich - out to other schools		17162	2016-10-24 15:23	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			Prospect Lake- out to other schools		17162	2016-10-24 15:24	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			SIDES		17162	2016-10-24 15:15	f	1 day	m.nelson	View / Edit
<input type="checkbox"/>			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
 - Excel output – creates a Libre Office Calc spreadsheet which you can save, makes changes to, print, etc
 - Tabular output – 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

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 Report:

Recurrence Interval: 7 Day(s)

Run as soon as possible

2016-11-21 8 AM

Send completion notification to this Email address: mnelson@sd63.bc.ca

Selected Folder: **Overdues and Items Out**

Output Folders

- Holds
- Lost and Missing
- Monthly circulation stats
- Overdues and Items Out
- Patron lists
- Reading history
- Shared overdue and items out templates
- Shared title lists
- Title lists

Choose a folder to store this report's output:

Save Report Save As New Cancel

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.

Circulation -> Due Date/Time
Earlier date in the upper box, more recent date in the lower

Date Between Relative Date 7 Day(s) ago - And - Relative Date 1 Day(s) ago

Circulation -> Patron -> Primary Identification Raw Data In list BNSF 20 Add Del