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)	✓ Submit							
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	Vie v/Ec			
	Bayside - out to other schoolsa		17162	2016-10-24 15:10	f	1 day	m.nelson	View / Ed			
	BaysideDeep Cove		17162	2016-10-24 15:14	f	1 day	m.nelson	View / Ec			
	BNSP_lost, missing		17156	2016-10-25 09:46	f	1 day	m.nelson	View / Ec			
	Claremont claimed returned		17156	2016-10-13 08:49	f	1 day	m.nelson	View / Ec			
	Claremont claimed returned2		17200	2016-10-13 08:58	f	1 day	m.nelson	View / Ec			
	Keating - out to other schools		17162	2016-10-24 15:18	f	1 day	m.nelson	View / Ec			
	Lochside - out to other schools		17162	2016-10-24 15:19	f	1 day	m.nelson	View / Ed			
	North Saanich - out to other schools		17162	2016-10-24 15:23	f	1 day	m.nelson	View / Ed			
	Prospect Lake- out to other schools		17162	2016-10-24 15:24	f	1 day	m.nelson	View / Ed			
	SIDES		17162	2016-10-24 15:15	f	1 day	m.nelson	View / Ed			
	test - lost and missing		17156	2016-11-10 12:20		1 day	m.nelson	View / Ed			

- 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.

F	Recurring Report:	✓ 7 ✓ Day(s) ✓
\sim	end completion notification to this Email address:	mnelson@sd63.bc.ca
c	choose a folder to store this report's output:	Selected Folder: Overdues and Items Out
	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 v 7 v Day(s) ago - And -	
Circulation -> Patron -> Primary Identification	Raw Data	In list	Relative Date v 1 v Day(s) ago BNSF 20 Add Del	
			×	