Reports Overview

Overview

In this chapter you will learn about report functions and report types. You will also learn about the Report wizard properties, toolbar, wizards, and helpers.

Before You Begin

Before you can view or print finished reports, PCs where WorkFlows is installed must have a temporary folder (usually *C:\temp*).

To verify that you have a Temp folder in the drive C directory, go to **Windows Explorer**. If you do not have a Temp folder, you will need to create one. To do this, click **New** on the **File** menu, and then click **Folder**. Name the new folder **Temp**.

Report Functions

Sirsi defines reports to include any process that can be scheduled in Unicorn. Reports in Unicorn WorkFlows can improve the functioning of a library. You can perform the following tasks more easily with reports.

- Track statistical and management information by counting various staff processes to measure productivity, identifying items that are likely candidates for weeding, or tracking fund information for budgeting
- Streamline daily library processes by creating bibliographies, sending overdue notices to users, comparing the catalog shelflist to the items on the shelf, or generating vendor claim lists or orders
- Perform housekeeping tasks by updating catalog indexes, changing the status of groups of users, or removing users or items in batches when necessary

Unicorn reports are organized into general groups, with specific report types in each group. Although you can use many reports as they are, you can tailor a basic report to meet your specific needs.

Once you select a report and have made formatting decisions, the report can be scheduled to run immediately, periodically, or saved as a report template to be run later. Reports can be printed, e-mailed, viewed, or saved as a text file (usually in WordPad).

Note Reports scheduled using the Report Utilities in previous versions of Unicorn can be converted to run in the graphical version of Unicorn reports by using the Convert Report wizard on the Reports toolbar. For more information on the Reports toolbar, see "Reports Toolbar and Wizards" on page 16.

Report Types

All Unicorn reports fall into one of the following report types.

Count

Count type reports answer the question, "How many meet this criteria?" Examples of this type of report are Count Bills, Count Charges, and Count Items.

Import/Export

Import/export type reports batch load new information to the Unicorn system or extract Unicorn information for use by an external system. Examples of this type of report are Load Bibliographic Records and Load Authority Records.

Label

Label type reports produce information in a format used for printing labels. Examples of this type of report are Vendor Address Labels and Added Item Labels.

List

List type reports answer the question, "Which ones meet this criteria?" Although it is one of the most customizable types of report at its most basic state, many reports are based on a list report with selections and formatting decisions already made. Examples of the list type of report are List Users, List Items, and List Order Line Items.

Maintenance

Maintenance type reports make changes to existing information in the Unicorn system. Examples of this type of report are the rollover series in the Acq group, the Add, Delete, Update Databases report, and the Reorganize and Rebuild reports.

Notice

Notice type reports answer the question, "Who needs what information sent to them?" It selects the users or vendors to receive the notice and the notice text, and can be e-mailed directly to users and/or have address labels printed. Examples of this type of report are Vendor Acquisition Claims, User Announcement, and Overdue.

Remove

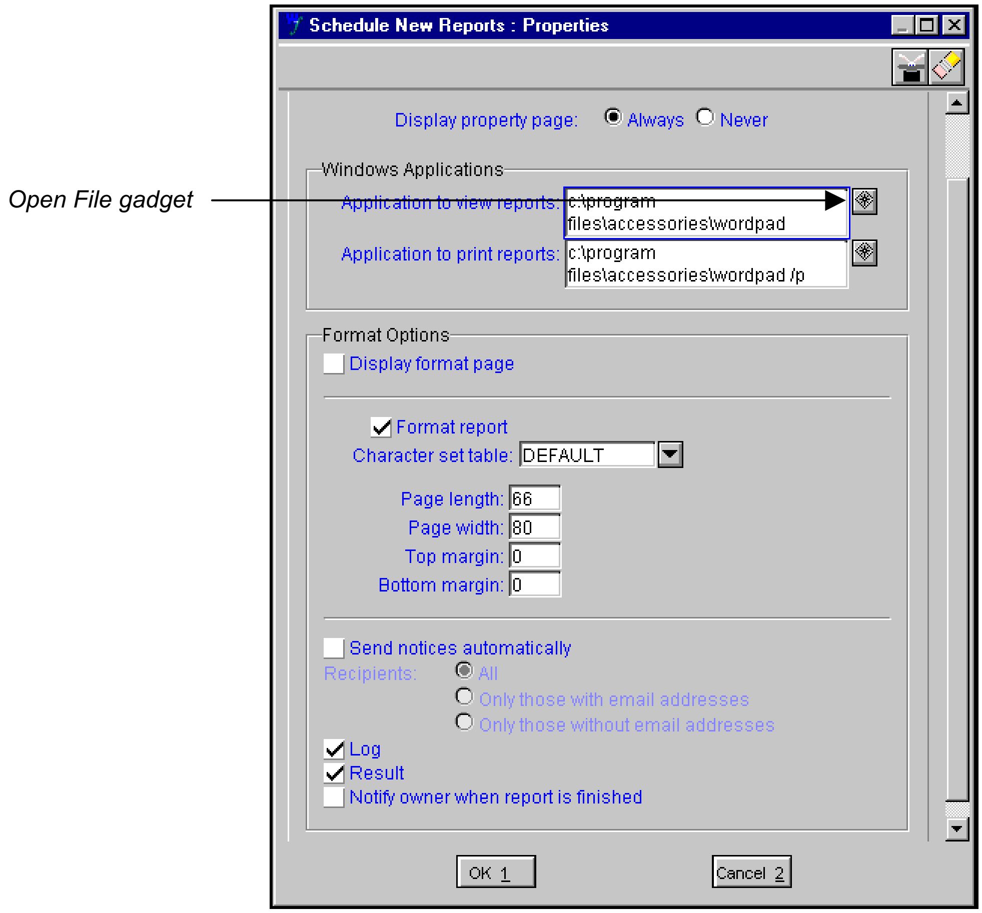
Remove type reports permanently remove information from the Unicorn system. Caution is advised when running reports of this type, and in many cases, these reports are password protected. Examples of the remove type are Remove Users and Remove Bills.

Statistics

Statistics type reports produce tables of statistical information from the Unicorn system. Examples of the statistics type include Average Price of Books, List User Department, and Birthyear.

Report Wizard Properties

The same Properties page displays for the Setup and Schedule New Reports, Scheduled Reports, and Finished Reports wizards. Modifications made to these properties are retained for all wizards for the duration of the WorkFlows session.



Windows Applications

Under Windows Applications, you can select the word processing program that you want to use to view and print reports, for example—WordPad or Word.

If the program you want is not installed in the C:\Windows directory, you must type the full path to the executable file. If needed, you can locate the executable for the application using the **Open File** gadget.

Application to View Reports

The program entered in this field is started when you click **View**. The program is used to view templates, scheduled reports, and finished reports. The report displays in the document window, and can be printed or saved from the application after viewing.

Application to Print Reports

The program entered in this field is started when you click **Print**. The program is used to print finished reports using the PC Print option. The report displays in the document window, and can automatically be printed to a default printer by using the `/p` command in the path.

Format Options

Display format page

If you print multiple character sets, send your work to a printer other than your default, or print reports that are output in a nonstandard page size, you can select the Display Format Page option to display the format page. The format page includes the character set used, as well as the page length and width, and top and bottom margins.

If you select the Display Format Page option, the Change Format button displays on the Schedule step of a report, and then displays the format page. However, you must enter a user or printer value in the **To** field for e-mailing or printing. Format buttons must also be selected for the format page to actually display. If no value is entered in either of these fields, and the Change Format button is selected, a message displays that there is no format to change. If the Display Format Page is selected for finished reports, a Format Page option displays before displaying a finished report.

Format report

This option allows you to use the default formatting option. If you select this option, a displayed report will reflect Unicorn-defined formatting specific to each report such as report headers, spacing, and page breaks. In some cases, it might be useful to display an unformatted report, then format it using a word processing program.

Modifications can be made to the number of lines on the page, number of characters in each line, and line size of the top and bottom margins for default settings.

Character set table

This field specifies the character set used to translate formatted reports. Only formatted reports use this character set. The default value DEFAULT is appropriate for most systems except Chinese. If you want to select another character set table, use the drop-down list, and then make your selection.

Page length/page width/top margin/bottom margin

You can modify the number of lines on the page, number of characters in each line, and line size of the top and bottom margins for default settings. If the Display Format Page property is selected, you will have the option to modify these values when scheduling or viewing the report.

Send notices automatically

This field applies to notice type reports only. You must define an e-mail address in the appropriate field of the user record for notices to be automatically sent.

If you select the Send Notices Automatically option, you can specify the recipients.

Recipients

If you select the Send Notices Automatically option, you can specify the users (recipients) who will automatically receive notices based on the e-mail address included in the user record. If notices are sent automatically, you may want to separate e-mail and non e-mail recipients to prevent sending duplicate paper notices, particularly if the Count as Notice Sent option is used to keep track of the notices each user received. You have three options for Recipients.

- All
- Only Those with E-mail Addresses
- Only Those without E-mail Addresses

Log

When you select this option, the distributed results of the report, if e-mailed or printed, will include the log. The log is a detailed description of the formatting options used and how the selection criteria affected the results. Some reports are wholly contained in the log, and an attempt to distribute a log-only report as results will send a header-only message to the e-mail recipient or an illegible message to the printer. The log is always available from the finished list.

Result

If you select this option, the distributed results of the report, if e-mailed or printed, will include results. Results include the primary text of the report.

Notify owner when report is finished

When you select this option, the system sends a brief e-mail message to the report owner when the report has been run, and is either available for viewing from the finished list or has been printed or e-mailed. The e-mail address that appears in the **From** field of this e-mail message is the login or e-mail address of the user who last ran the report server.

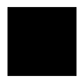
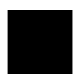
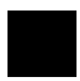
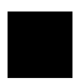
Notes

- You can change the setting for Format Finished Report before viewing, e-mailing, or printing the report.
- Log and Result settings carry over to the selections when working with finished reports.

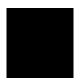
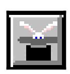
Reports Toolbar, Wizards, and Helpers

Reports Toolbar and Wizards

You can use the Reports toolbar to display the wizards used to identify and schedule reports.

Wizards	Purpose
	**Convert Reports** – Converts reports scheduled under character interface versions of Unicorn. Most customers who installed at Unicorn 99 or later will probably never use this wizard. The Convert Reports wizard is used to convert a scheduled report that has not run in WorkFlows reports. Once the report has been converted to WorkFlows, it can no longer be modified or duplicated in the character mode of Unicorn reports.
	**Setup and Schedule New Reports** – Creates a new report.
	**Scheduled Reports** – Displays reports that have been created, but are scheduled to run in the future or periodically. This wizard can be used to modify, duplicate, remove, or change the way a report is run.
	**Finished Reports** – Displays the results of reports that have finished running. Printing and removing report results are among the other options.

Reports Helpers

Helpers	Purpose
	**Filter and Sort Finished Reports Helper** – Filters reports to display only those specified in the filter screen area. Reports can be sorted by report owner, report completion date, report name, or next run date. Only Unicorn administrators can sort by report owner, but other options are available to general library staff. You can order reports to display in ascending or descending order. Selected filter and sort settings will remain throughout a Unicorn session or until changed, and will carry over to the templates and converted and scheduled reports. Click **Clear** to return the settings to the default.
	**Display Report Scheduler Status** – Displays scheduled reports if the report scheduler is running. The report name, owner, and date/time that the report began running display. This helper is available in the Scheduled Reports wizard and the templates display of the Setup and Schedule New Reports wizard.
	**Refresh Report List** – Checks for any new reports that were created or completed after the lists were first displayed. If the window had been idle for a while, any changes to the list will display. Using this helper increases efficiency and helps keep the desktop clean. This helper is available in the Scheduled Reports and Finished Reports wizards.
	**Select Tab Helper** – Displays an alphabetical list of tabs. Using this helper, you can quickly jump to the tab you want to access.

Scheduling New Reports

Overview

In this chapter, you will learn how to create new reports using the Setup and Schedule New Reports wizard. You will also learn about Report templates and the Schedule New Reports wizard tabs.

Setup and Schedule New Reports Wizard

The Setup and Schedule New Reports wizard is used to create a new report.

Scheduling a New Report

1. Click the **Setup and Schedule New Reports** wizard.

   The Schedule New Reports wizard properties page appears.

2. Click **OK** to accept the defaults. The Display Templates Report window appears.
3. On the **Templates** tab, select a template (or select a generic Unicorn report from another tab) that you want to base the new report on, and then click **Setup & Schedule**. The Schedule New Reports window appears.
4. Define and format information to be included in the report using the Basic Information, Selection Criteria, Sorting Criteria, and Output Options tabs, and then click **Schedule**.
5. Determine when the report will run, and then click **OK**.

Templates

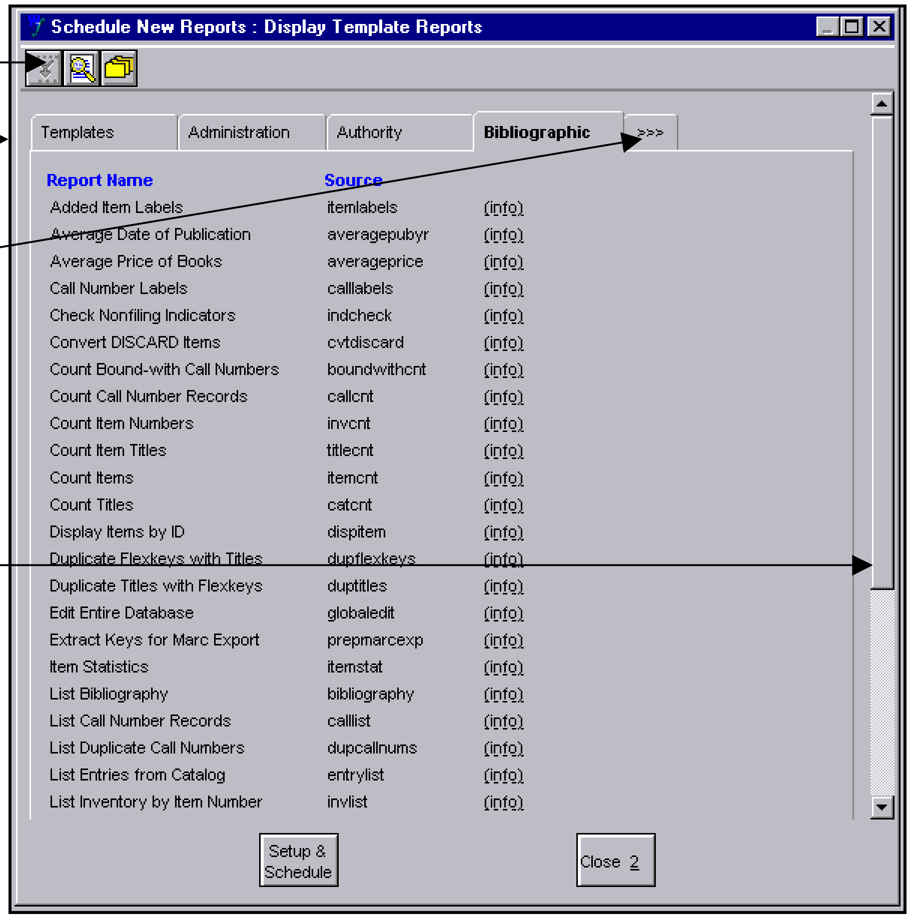
When you use the Setup and Schedule New Reports wizard, the Templates tab displays a list of reports based on generic Sirsi-delivered reports that were modified and/or saved as templates by library staff. If there are no report templates saved, the tab does not display.

Helpers

Tabs

Use the Advance tab to display additional tabs

Use the scroll bar to move to different parts of the window

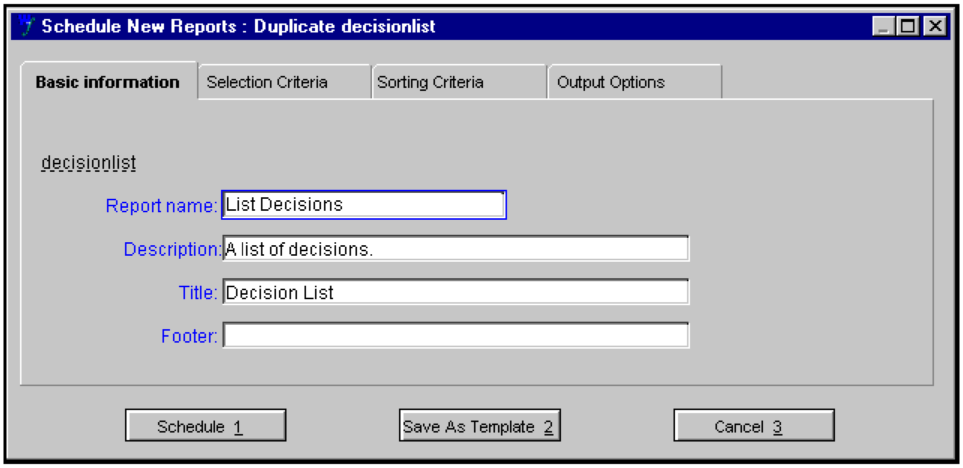


You should save a report as a template under the following circumstances.

- If the report is needed one or more times in the future, but you do not want it to run automatically at a specified date and time.
- If you want to run a series of similar reports, changing only one or two selections or output options at a time.

Schedule New Reports Wizard Tabs

Basic Information



Every report has the same Basic Information tab. The following fields may have default values, but they can be edited.

Report name

This name displays in the finished or scheduled report lists. If left unchanged, it is also the name displayed in the new report or template list.

Description

This field describes the report results. The default value describes the report if it runs without making any changes to selections or output options.

Title

The title in this field displays on the first line of each formatted page of the printed report. The date and time that the report was produced follows the title.

Footer

When used, this optional field displays on the last line of each formatted page of the printed report. It can be used to record a date or range of dates that a report covers.

It's helpful to modify information in the Basic Information tab in a multilibrary setting where multiple staff members are running the same types of reports. Maria and Cherise, for example, run the List Bibliography report on a regular basis, but set up their reports differently for their respective libraries. Changing information in the Basic Information tab makes it easier to distinguish reports from one another.

Selection Criteria

Making selections in this tab limits the amount of data that will be output in this report. The List Bibliography report, for example, is used to output information about bibliographic records in the catalog. Before any selections are made in the Selection Criteria tab, the report is set up to list every bibliographic record in the catalog. Because this is impractical output, you should make selections to only output a subset of all bibliographic records, for example—the output could contain all records that have the word Halloween in the 650 tag of the bibliographic record.

Keep in mind that it is not necessary to make selections in every available field on the Selection Criteria tab.

Sorting Criteria

This option is available in some reports, particularly lists and notices, when it may be beneficial to have various options for sorting report results. To make sorting selections, you can use the **Sorted by** drop-down list. The following **Sorted by** options, for example, are available for the List Bibliography report.

- Author/title
- Call number
- Title/author

Output Options

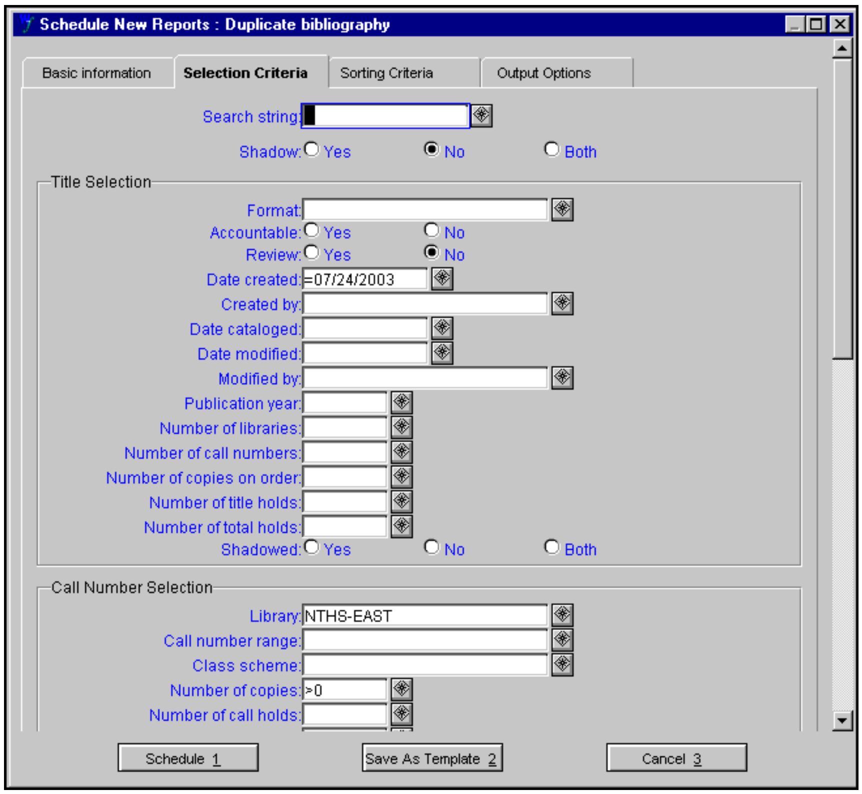
Based on available output options, the appearance and content of Unicorn reports can vary significantly. Selections along with output options are used to design a custom report to meet library needs.

Options in this phase of the report influence what information is included in the printed report results and in what format. Most report results default to include general information that can be expanded by making more selections in the Output Options tab.

Frequently Asked Questions

How do I save a report as a template to be used later?

1. Click the **Setup and Schedule New Reports** wizard.
2. Select a report to be scheduled that is most like the report you want.
3. Make any changes to the report.



4. Click **Save As Template** to place the report that you created into the Templates tab of the Setup and Schedule New Reports wizard.
5. After you save the template, you can schedule a new report, display scheduled reports, or close the wizard.

Note You must schedule the report to run using the Setup and Schedule New Reports wizard. The report template that you just created will not run without scheduling the new report.

Displaying Finished Reports

Overview

In this chapter, you will learn how to display finished reports using the Finished Reports wizard. You will also learn how to verify reports and remove, view, print, and e-mail finished reports.

Finished Reports Wizard

The Finished Reports wizard is used to view all reports that have been run. You can view, print, e-mail, or save finished reports.

Keep in mind that users with public services or technical services access can only view reports run by users with the same login, for example—users with a CIRC login can only view reports run by users with a CIRC login. System administrators can see reports run by any user regardless of user access.

If a report is run that needs to be viewed by users with different user accesses, the system administrator can modify the ownership of a report. To do this, click **Ownership** on the List Finished Reports window to open the **Change Owner** window. The Change Owner window allows you to select a new owner option from the drop-down list of existing user accesses.

Displaying a Finished Report

1. Click the **Finished Reports** wizard. 
2. Scroll through the reports until you find the one that you want to review, and then select it.
3. After selecting a report, you can use the **View**, **Print**, or **Email** buttons to determine how it will be distributed. Use the check box options to select the display of the log and/or results. Determine whether the output should be displayed in Unicorn format, and make any changes to the page format of the document, if displayed.
4. When a report has been printed or e-mailed, you can review the report again, display finished reports, or close the Finished Reports wizard.

Notes

- Unicorn supports up to 2,000 finished reports.
- You can use the **Filter and Sort Reports** helper to limit and sort the display.
- You can use the **Remove** button to remove one or more finished reports from the list.
- Although you do not have an option to download a finished report, you can use the **Save As** option on the **File** menu of the program used to view and/or print reports.

Verifying Reports

You should verify that all reports, especially required maintenance reports, ran without error on a daily basis. If a report encountered an error, notify your library's Unicorn administrator.

Important Note If a required maintenance report has the status of ERROR, do not remove the report from the finished list. The library's Unicorn administrator will contact Sirsi's Client Care Center and take recommended steps.

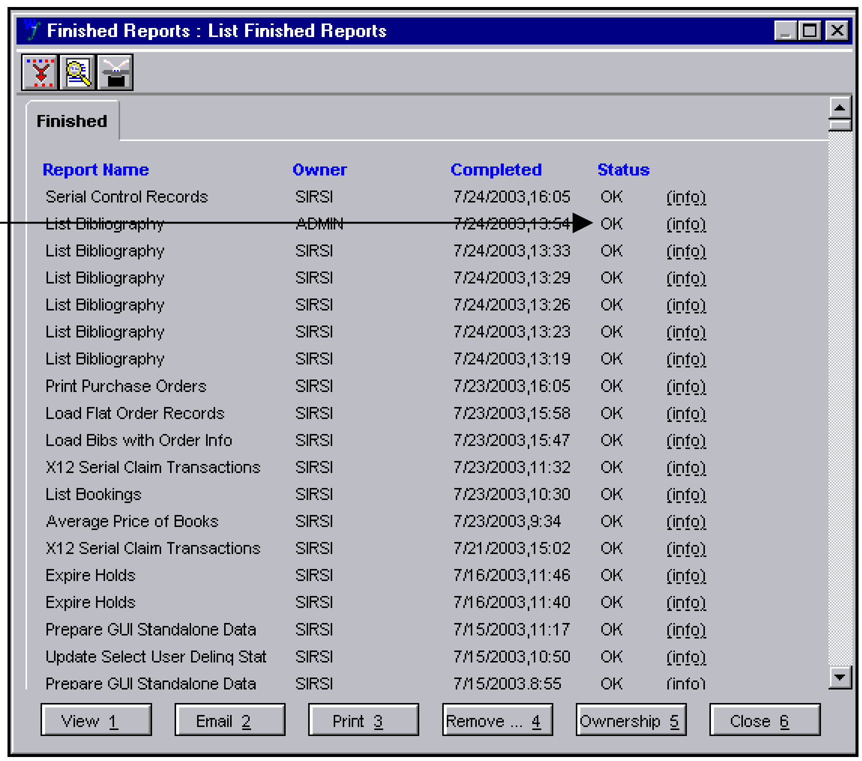
To verify that a report ran without error, follow these steps.

1. Click the **Finished Reports** wizard.

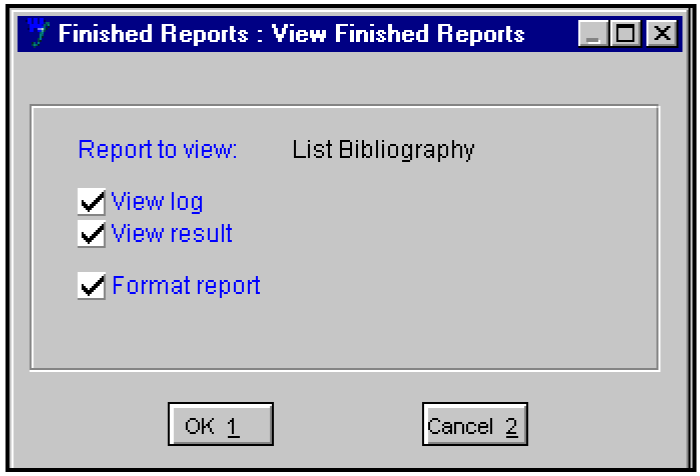
   The Finished Reports properties window appears.

2. Click **OK** to accept the defaults. The List Finished Reports window appears.

Finished report status



3. Note the Status column. There are two report statuses:
   - **OK** – Indicates that the report was finished.
   - **Error** – Indicates that the report was unable to finish. Do not remove this report. If ERROR is displayed in the status column, notify your library's Unicorn administrator.
4. Click **View**. A View Finished Reports window appears.



5. Select or clear the options you want, and then click **OK**. The selected finished report will open in WordPad or another designated word processing program.
6. Scan report logs for the words "error" or "abnormally."

You can use the word processing program's **Find** feature to search for the word "error" or "abnormally."

Removing Finished Reports

The **Remove** option allows you to remove finished reports. You should remove unneeded finished reports to recover disk space and reduce the clutter on a weekly basis.

Guidelines

When removing unneeded finished reports, follow these guidelines.

- Remove finished maintenance reports, as well as unneeded finished reports run by staff.
- When removing finished required maintenance reports, retain reports dated from the latest two days in the list. If subsequent reports run in ERROR, the Client Care Center may want information from the reports finished in the few days before the error.
- Do not remove a maintenance report that is the subject of a Client Care Center call until the call is resolved.
- Remove all finished reports that are older than two weeks.

If the results of a finished report will be needed in the future, you can view the file, and then save it using your word processing program.

Steps

Important Note Once a report has been removed from the Finished List of Reports, it cannot be retrieved again.

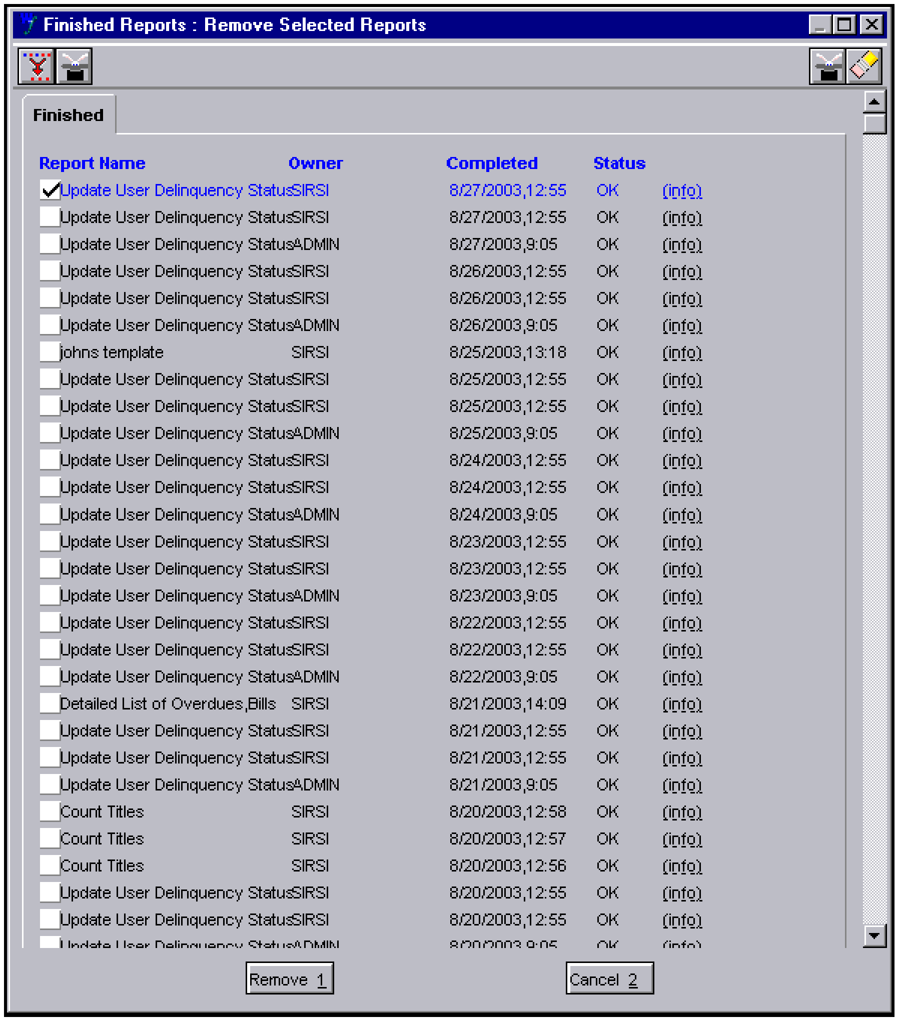
If a report has been viewed and is no longer needed, follow these steps to remove it.

1. Click the **Finished Reports** wizard.

   The Finished Reports properties page appears.

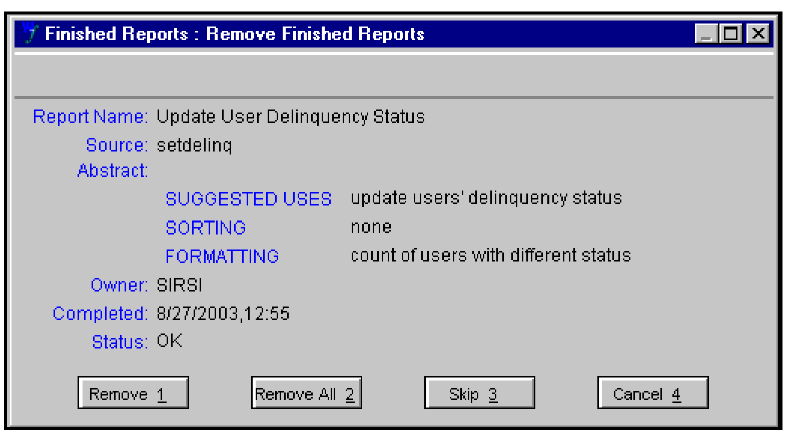
2. Click **OK** to accept the defaults. The List Finished Reports window appears.

3. Select the report you want to remove, and then click **Remove**. The Remove Selected Reports window appears.



4. If you want to remove additional reports, select the check box of each report you want to remove.

5. Click **Remove**. The Remove Finished Reports window appears.



6. Select the option you want. You have these options:

    - **Remove** – Removes the report you selected.
    - **Remove All** – Removes all of the reports you selected.
    - **Skip** – Keeps the report on the list of templates, and on the list of scheduled or finished reports.
    - **Cancel** – Returns to the List Finished Reports window.

7. If you choose to remove the reports, WorkFlows returns a Remove Result message indicating how many reports were removed. Click **OK** to close the message.

Finished Reports Review

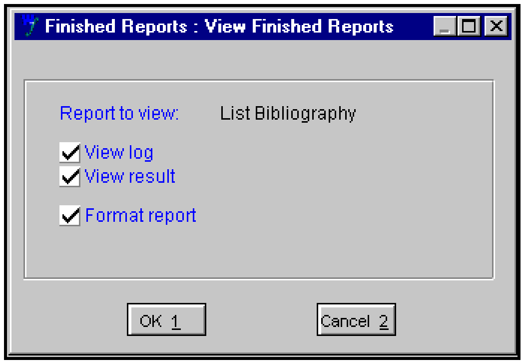
1. How do I delete a report with a status of Error?
2. Maintenance reports like Add, Delete, Update Databases, should be checked for errors on a ___________ basis.
3. If your library was installed at V2000, when would you use the Convert Reports wizard?

Answers

1. Do not delete a report with the status of error until after Sirsi's Client Care Center has been contacted. A customer service representative will guide you through steps to be taken.
2. Maintenance reports like Add, Delete, Update Databases should be checked for errors on a daily basis.
3. Never. The Convert Reports wizard is used only on reports scheduled using the character interface in Unicorn 98.2 and earlier.

Viewing Finished Reports

The **View** option displays a document with the specified log and result selections. You can edit or reformat the report text, as well as print or save it as an electronic file.



View Log

If the View Log option is selected, the results of the report will include the log. The log is a detailed description of the formatting options used and how the selection criteria affected the results. It provides information such as how many records were selected at each step in the selection process. Logs are helpful when first setting up a report, or comparing the results of slightly different reports.

View Result

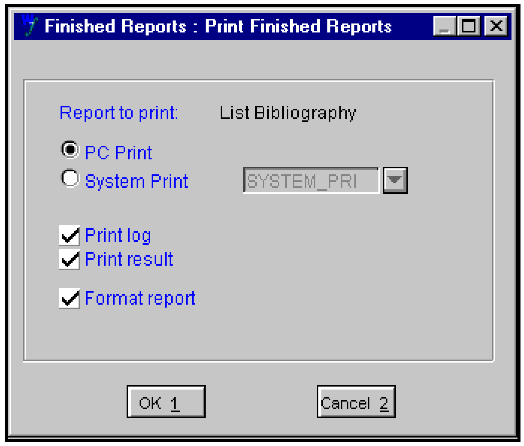
If the View Result option is selected, the primary text of the report displays. Generally, you should always select this option.

Notes

- Some reports, such as Count Users, are wholly contained within the log, and an attempt to view a log-only report if the Log property is not selected will return an error message.
- The Sirsi default word processing program is WordPad, but this is configurable using the Report wizard properties. You must **Exit** the viewing application between reports or the most recently viewed report will not display.
- The default Log and Result settings carry over from selections made in the Log and Result fields on the Properties page.

Printing Finished Reports

The **Print** option allows you to print finished reports using a default Windows printer or Unicorn system printer.



PC Print

If you select this option and if the PC being used for reports has an attached printer or is set up to have a default network printer, the report will be sent automatically to the defined printer.

System Print

This option sends results directly to a Unicorn system printer selected from the list.

Print Log

If you select this option, the print report will include a log. The log is a detailed description of the formatting options used and how the selection criteria affected the results. It provides information such as how many records were selected at each step in the selection process. Logs are very helpful when first setting up a report, or comparing the results of slightly different reports.

Print Result

If you select this option, the printed report will include the primary text of the report. Generally, you should always select this option.

Format Report

The Format Report option allows you to use the default formatting. If this option is selected, an e-mailed report will reflect Unicorn-defined formatting specific to each report, such as report headers, spacing, and page breaks. In some instances, it might be helpful to print an unformatted report to enhance readability or conserve paper.

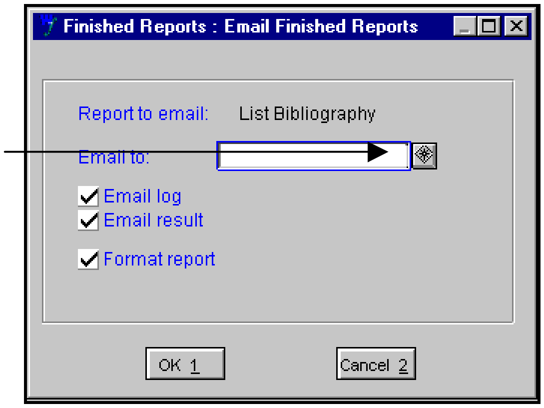
Notes

- Some reports, such as Count Users, are wholly contained within the log, and an attempt to view a log-only report if the Log property is not selected will return an error message.
- For notice type reports, you must format the report to print the notice text message.
- The Sirsi default word processing program is WordPad, but this is configurable using the Report wizard properties.

E-mailing Finished Reports

The **Email** option sends a finished report to selected e-mail addresses.

Email Addresses gadget



Email To

If the system is configured for e-mail, this selection sends the report directly to an e-mail address or list of addresses. You can use the Email Addresses gadget to enter addresses.

Email Log

When this option is selected, the e-mail recipient will receive results that include the log. The log is a detailed description of the formatting options used and how the selection criteria affected the results. It provides information such as how many records were selected at each step in the selection process. Logs are helpful when first setting up a report, or comparing the results of slightly different reports.

Email Result

When this option is selected, the mailed results will include the primary text of the report. Generally, you should always select this option.

Notes

- If the report is a notice type report and you selected to e-mail notices to users with e-mail addresses, the users entered in **Email To** field will receive the entire report, including all users' notices. Individual notices are automatically e-mailed based on the e-mail entry ID in the user address of the user record.
- Some reports, such as Count Users, are wholly contained within the log, and an attempt to email a log-only report if the Log field is not enabled will return an error message.