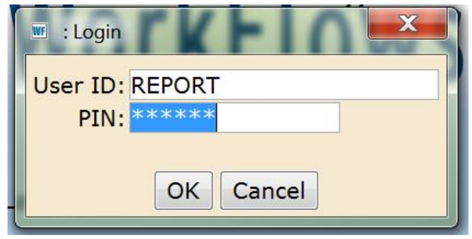
Date:	**May 26, 2015**
To:	**SWAN Member Library Directors and Administrators**
CC:	**Library Department Managers, Library Staff**
From:	**Kate Boyle, SWAN Member Services Manager**
Re:	**Migration Memo #22: Report Update**

In order to empower libraries to run more reports on their schedule, SWAN has created a new login. The User ID and PIN are (REPORT/ REPORT). The templates assigned to this login can be scheduled and run by your library anytime between 9 AM and 6 PM daily.

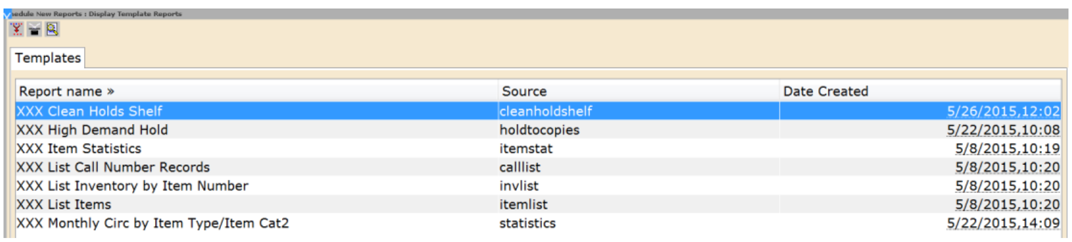


Getting Started

Login to Workflows using the User ID: REPORT and PIN: REPORT

Once you have logged in click on Schedule New Reports, you may or may not have to review your session settings dependent on your own settings. After reviewing your session settings, click OK.

The template screen lists the various reports available for your library use at present. SWAN anticipates adding more templates to this list as we move forward.

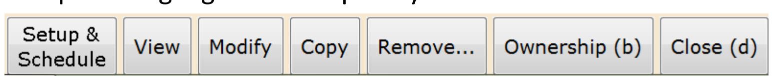


Templates

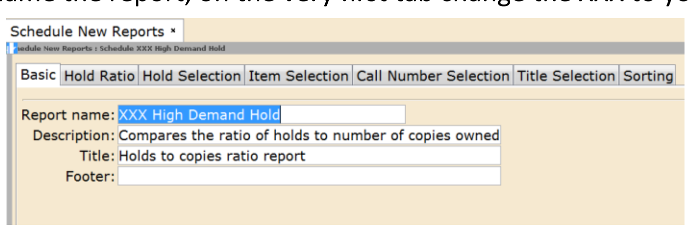
Report name »	Source	Date Created
XXX Clean Holds Shelf	cleanholdshelf	5/26/2015,12:02
XXX High Demand Hold	holdtocopies	5/22/2015,10:08
XXX Item Statistics	itemstat	5/8/2015,10:19
XXX List Call Number Records	calllist	5/8/2015,10:20
XXX List Inventory by Item Number	invlist	5/8/2015,10:20
XXX List Items	itemlist	5/8/2015,10:20
XXX Monthly Circ by Item Type/Item Cat2	statistics	5/22/2015,14:09

Running a Circulation Report

The first and most important step is to highlight the template you want to use and click on "Modify" at the bottom of the screen.



The screen will repaint giving you the opportunity to rename the report so you can find it in the list of finished reports after you run it. To rename the report, on the very first tab change the XXX to your three letter agency code.

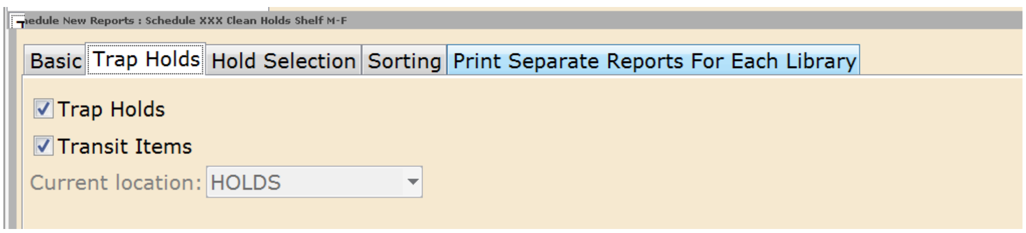


After you have renamed the report, follow the instructions for configuring the individual report (available on the SWAN website). Remember the High Demand Holds report can be configured to run a ratio against just your items or across the entire database. You may wish to do both. Instructions for the High Demand Hold reports are available under [Documentation >SD Circulation>Reports.]

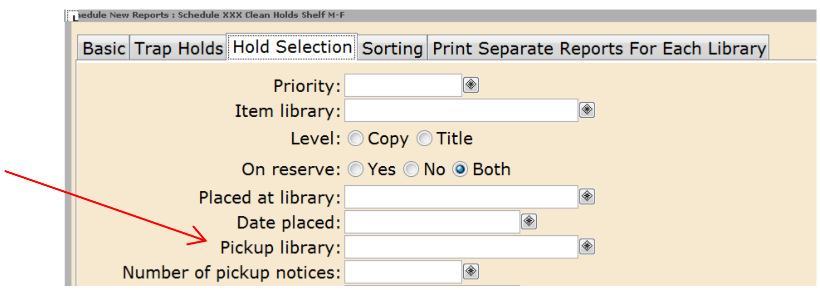
<u>Clean Holds Shelf Report</u>

One of the templates assigned to the new REPORT UserID is the Clean Holds Shelf report. This report should be run at least Monday through Friday. The Clean Holds Shelf (Cleanholdshelf) report generates a list of INACTIVE holds that have been cancelled, removed, or expired, or a list of ACTIVE holds that have been suspended. These holds need to be cleared from the Holds shelf. Again start by modifying the template, changing the name of the report by adding your three letter agency code to the title.

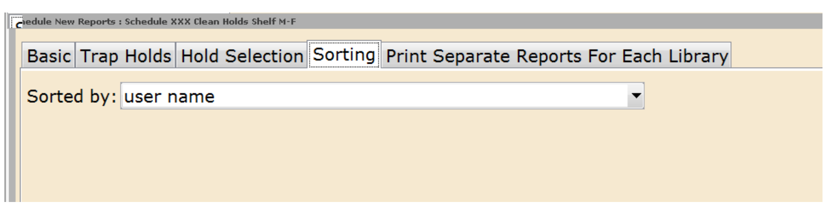
Do not make any changes on the “Trap Holds” tab.



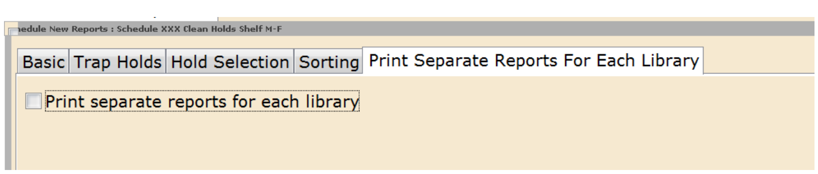
On the “Hold Selection” tab use the gadget or enter your three letter agency code in the “Pickup Library” field.



On the “Sorting” tab no changes are necessary. The report will sort by user name.



Leave the “Print Separate Reports for Each Library” unchecked.



Now click on Setup & Schedule, then choose Run, then Display Finished Reports. The report will display under the “Finished” tab when it is completed. You may wish to click on the icons  at the top of the page to see if your report is still running (magnifying lens) or if it is finished (rabbit in a hat). Remember, the Clean Holds

Shelf report must be run at least Monday through Friday. Once the report is run you can view, print, or email the report. If you choose to view it: you can view the log, view the report, or format the report.

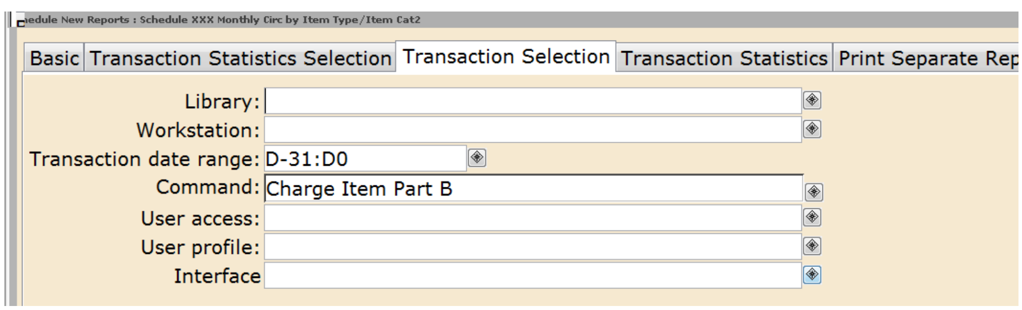
<u>XXX Monthly Circ by Item Type/Item Cat2</u>

The Monthly Circ by Item Type/Item Cat 2 provides you with a breakdown of your monthly circs by item type and Item Category 2 (adult, juvenile, teen, unknown). For example,

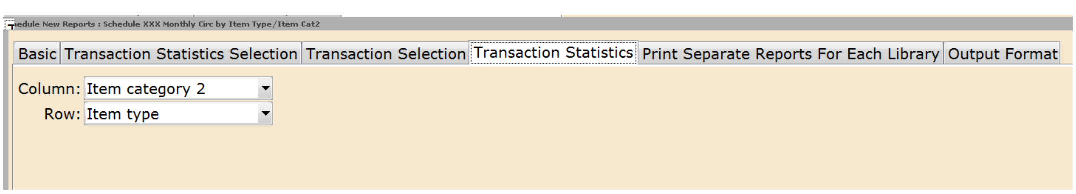
Item typeItem cat2	ADULT	JUVENILE	TEEN	UNKNOWN	TOTAL
BLURAY	3	2	0	0	5
BLURAY_FEA	72	45	0	0	117
BLURAY_NEW	32	0	0	0	32
BLURAY_NFE	2	0	0	0	2
BOOK	1732	2600	371	6	4709
BOOK_J	0	172	3	0	175

Again start by modifying the template, changing the name of the report by adding your three letter agency code to the beginning of the title. On the "Transaction Statistics Selection" tab, use the gadget or enter your three letter agency code towards the bottom of the page in the "Item Library" field.

On the "Transaction Selection" tab, use the gadget or enter your three letter agency code in the "Library" field. The transaction date range is set to 31 days previous to the report run date. This has been setup for your May statistics (or any month with 31 days). You will need to change this to D-30:D0, for the month of June. Do not change the Command field.



On the "Transaction Statistics" tab leave both settings: Column: Item category 2, Row: Item type.



On the "Print Separate Reports For Each Library" tab, leave the checkbox unchecked. On the Output Format tab check "Generate pipe delimited output" . Now click on "Setup & Schedule", then choose "Run", then "Display Finished Reports". The report will display under the "Finished" tab when it is completed. You may wish to click on the icons  at the top of the page to see if your report is still running (magnifying lens) or if it is finished (rabbit in a hat). You probably need to run this report only once a month for your monthly statistics.

<u>Tech Services/ Cataloging</u>

The remaining templates available with the REPORT login are cataloging/ tech services reports. These templates were explained during Cataloging training before migration. Attendees were provided with handouts of the various templates and how to use them to query your library data. These reports should only be run between the hours of 9 AM and 6 PM.

XXX Item Statistics	itemstat
XXX List Call Number Records	calllist
XXX List Inventory by Item Number	invlist
XXX List Items	itemlist

If you should have any questions regarding any of these templates and reports please call our office at 630-734-5153 or send an email to help@swanlibraries.net .