

Branch Reports Documentation

by Laura Melton (lbrmelton@kcls.org)

Branch staff with level 3 access to their CIRC accounts can now generate certain common kinds of reports on their own, without needing to asking Kathy Agnew or Laura Melton. However, these are not the only kinds of reports that are available, and staff should feel free to ask for information that is not available through these five report options.

Corine Lichtenberg (at Kent) was my beta-tester for these reports and has nothing but praise for these reports. She says,

I am not sure if I can convey to you what a great help it has been to be able to run these reports myself. ... These lists are a great aid to collection management—ooh, be careful of *that* term—in that you can have a volunteer or page look for Trace items, items which have been in transit for too long, etc. The emphasis should be that it is *not* mandatory to use these reports. Library people can interpret things as 'oh great, more work!' when it actually can reduce workload.

I encourage you to try out these reports and to suggest improvements. Development of these reports doesn't have to stop here.

Reports currently available

- ❑ "Dusty books" — Holdings that have not been circulated for a year, or since a specified date, excluding some collection codes, item types, and statuses:
COLL: "VF," "[X]", "NC"
ITYPE: "[PR]", "[X]", "[NC]" "[REF]"
STATUS: "AO" "M" "STO"
(The string "[X]" stands for any collection code or item type that has an X in it; likewise "[PR]", "[NC]", and "[REF]".)
- ❑ Holdings with one or more specified **collection codes**
- ❑ Holdings with one or more specified **status codes**
- ❑ Holdings belonging to your branch that have been **in transit** (either "TR" or "TH") for more than one week, or since a specified date
- ❑ Holdings **not** belonging to your branch that have been **in transit** (either "TR" or "TH") to **your branch** for more than one week, or since a specified date

Running reports

1. From the Dynix main menu, type **MISCR**.
2. Press the **UP arrow** on your keyboard once, so that the word "**Auxprinter**" is highlighted. Press the letter "**T**" and then hit **Enter**. The word "**Terminal**" will now be displayed. (This is so that the report will print to the screen rather than to your printer. If you don't do this, the report won't work.)
3. Arrow down to the report that you want to run, and press **F1** to start the report.
4. Follow the directions on the screen.
5. The output of the reports will be emailed to the address you specify, in an attachment with a .csv extension. The reports will open in Excel so that you can reformat and/or

resort them any way you want. In Outlook, you have **two options** to open the attachment so that it is editable:

- a. In Outlook, **right-click** the attachment and select "**Save as...**" to save it somewhere on your hard-drive. You can change the filename if you want, but do not change the .csv extension! Then locate that file and double-click to open it in Excel.
- b. In Outlook, **double-click** the attachment to open it with Excel in read-only mode. If you want to save the file, go to the "**File**" menu, select "**Save as...**" and save it somewhere on your hard-drive.

Whichever option you choose, if you make any reformatting changes to the file, you will want to tell Excel to save the file in its **native format** (.xls extension). Otherwise, when you open the file again, all your formatting will be lost. To do this, go to the "**File**" menu, select "**Save as...**" and change the "**Save as type**" drop-down box to read "**Microsoft Excel Workbook (*.xls)**." (Note that simply changing the file's extension without changing the file format type will not prevent Excel from opening it, but it will make it much less usable.)

A note about Excel and formatting

When the file opens in Excel, the columns will not have headings, and they will be very narrow and crunched. Drag the column edges around in order to resize them and make the data display better. Also, if you see barcodes like "2E+9" or dates like "#####" just widen the column a little, and the data will pop out.

Please let me know if you have any questions.