1) Title: Reports! Reports! Reports! -- the easy, the annoying, and the ugly
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John Cook Wyllie Library
(medium-sized academic Library)
Cataloger for over 25 years
Unicorn/Symphony user for over 15 years
--Currently: Symphony 3.4 / SaaS
Handout: presentation slideshow handout

2) Types of Reports
Presentation will review 6 kinds of reports, but really--
3 basic types of reports:
-- count
--data tables
--paragraph style (the most difficult to work with)
Data from all three basic styles can be transferred in to Excel
Symphony: New output options for table style reports: pipe-delimited / XML

3) What do you need/why do you need it
Narrowly tailor your report options --
what you want included vs
what you don't need (that can be excluded)
Make a template for recurring reports with most selections & print options set up
Templates should give just the right amount of information
Template names should be changed to show what info is output
ex.: InvCnt ==> CountItemNos -- Archives

Snapshot (lists / counts) -- Q. What is checked out now?
Activity (transactions) -- Q. What are the circulation totals for the year?
Grand totals (count) -- Q. number of DVDs?
Categorized -- Q. count of active users by profile/branch
Template = either Scheduled or On-demand
On-the-fly = one time need
Selection options  = Limit the amount of data gathered
Print options  = Limit the amount of data in output
4) Scheduling Reports / Print options

Standard table/paragraph format: opens into word processor –
use WordPad for quick copy/paste
use MS Word for processing paragraph style reports
Previously, this was the only Standard Print Output option for List reports
now there are also options for pipe delimited & XML
(some List reports still do not have the new options)
This is the easiest Print Option for the table style reports

Pipe delimited format: opens both into word processor & as separate file on
the server
-- copy/paste into Excel

XML (XSL stylesheet): opens directly into Excel
XML = Extensible Markup Language
XSL = Extensible Stylesheet Language

5) Finished report options
Reports can be viewed several times --
formatted to review row/column headers
unformatted to copy/paste to Excel
"Oversized" reports with "big" pages
adjust the "page" size to review all the columns
the page width can be set to as large as 250 characters

6) Count Reports / Book count

Count reports do not have a Print option,
since the output (a single number) is part of the Report Log

7) Transactions -- table style / Current Holds

Transaction statistics reports have no Print output choices
the reports come out in the "standard" table style

8) Current Holds -- formatted

When viewed the report opens in a word processor (WordPad, NotePad, MS Word)
Note: Using formatting uses blank spaces between data numbers
9) Current Holds (formatted) in Excel
Blank spaces prevent data from being placed in separate columns
Advantage of Formatted reports -- they have recognizable labels for the columns/rows
If you receive a formatted report like this, you can still convert it into a real table--
use the Text-to-Columns feature in Excel to convert to a Table

10) Transaction statistics -- table style / Current Holds
Unformatted reports have coded labels for some columns/row
Oversized reports will often line-wrap in MS Word
A single line will appear as multiple lines on the screen
Verify that there is only one paragraph mark for each single line

11) Current Holds (unformatted) in Excel
Review the Result as a formatted report to determine what the headers are
When writing up the procedures: make a note of what each coded label term means
$<total:U>$ is TOTAL
$<pieces_circ:U>$ is PIECES CIRC
Delete / Hide unwanted info, especially formatting instructions: ".end", ".block", ".colhead"

12) Current Holds (Excel transpose)
can use Excel transpose to switch rows & columns
In Excel --
Copy existing data
Open new worksheet (or just paste below the data)
Edit / Paste special / Transpose

13) Transaction statistics -- table style / Circulation statistics
Although the Pipe delimited option is available for transaction reports, it does not work properly, so the report Errors out
Treat these kinds of reports as unformatted table style
make sure that there are tabs between the fields
Reserves: Charge Reserve Part B / Renew Reserve
SD Help -- FAQs / Reports / Getting Tabular Statistics with a Report
The FAQ gives a list and description of all the Commands
this report used: Charge Item Part B to find activity statistics for:
Checking out non-reserve, non-booking items

14) Circulation statistics (unformatted)
Note: A sample report with test data
Uses tabs between data
Has some coded labels
15) **Circulation statistics & selections**

Call# range: AC-AZZ,B-BDZ,BF,BH-BJZ,BL-BXZ,C-CBZ,CD-CTZ,D,E,F1-F1000.99; etc.

Once the call# ranges have been created in the Gadget you can highlight & copy/paste the selection list & paste it in to a text file.

The next time you need to use the same call# ranges--just copy/paste back in to the selection box.

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16) **Circulation stats (unformatted) in Excel** [1]

Excel often confuses the hyphen for a minus sign, unfortunately, you can't fix it afterwards you have to redo the copy/paste action & make sure that the Excel column uses Text Format (not General Format)

Note: The call# range is pasted into two separate rows (AC-AZZ) the 2nd line is blank, if the call# consists of only a beginning value (BF)

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17) **Circulation stats (unformatted) in Excel** [2]

Column for call# range changed to: Text Format before pasting from Symphony Report now the call# range hyphen is not treated as a minus sign

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18) **List reports -- pipe-delimited / Video Pick List**

An on-the-fly report run to determine which titles were cataloged on a particular week

Cataloging Dept. requested these titles to be returned to them, since the videos needed further processing

Periodically look at the Fixed Format Manager wizard & remove unwanted files

The Fixed Format Manager wizard icon is in the Finished Reports bar, next to the icon for Display Report Scheduler Status (which is the icon that lets you know if reports are running)

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19) **Fixed Format Manager wizard**

Since the Report Session: View reports usually set to MS Word viewing the unformatted Result appears to be the same as viewing the .pipe report

If you want the file to open directly into EXCEL

Make sure to set the Report Session: View reports: excel.exe

Excel files usually found with path:

C:\Program Files\Microsoft Office\Office12\EXCEL.EXE
20) List reports -- pipe-delimited / Video Pick List
Excel will treat the pipes ( | ) as the field delimiter & will put the data into separate cells

21) List reports -- pipe-delimited / Video Pick List
Verify that Excel did not make the "wrong" assumptions about the data
When using Bibliographic/User reports make sure that numbers used for: barcodes / MARC tags / some Dewey#s
paste correctly into Excel as text
-- leading zero are often dropped: MARC tag 001 becomes "1"
-- ItemID & PatronID are treated as "long" numbers:
  barcode 20010001598593 becomes 2.001+E13
Use the labels which precede the data as the column headings
Hide unwanted data before printing

22) List reports -- XML files / Library Budget --- Reserve funds
XML = Extensible Markup Language
XSL = Extensible Stylesheet Language

23) Report Session / View properties
Make sure that the Session opens with the correct link to the Excel directory otherwise the report will not open properly
Excel files usually found with path:
  C:\Program Files\Microsoft Office\Office12\EXCEL.EXE

24) Library Budget -- Reserve Funds / Standard Formatted report for draft review
Note: A sample report (these funds do not have a budgeted amount)
When running the report for the first time, run as a Standard report view as a formatted report to make sure that the data is consistent multiple lines make one record "longer" than another

25) Library Budget -- Reserve Funds / XML/XSL (stylesheet) into Excel
Results open directly into Excel
In Excel, accept the default stylesheets
Note the fancy formatting: colors bars and column dropdowns for sorting
The multiple Excel rows also repeat the fund info each additional line will show the same fund amounts and be counted twice -- totals will be off!
26) Library Budget -- Reserve Funds / XML/XSL (stylesheet) into Excel
Results often include more columns than you want
Delete unwanted columns that have no data information
Hide unwanted data columns
If you need the information from a report which includes multi-lines
Run a separate report that outputs only that information

27) Library Budget -- Reserve Funds / SML/XSL (stylesheet) into Excel
To copy only the visible (unhidden) columns:
Highlight cells to copy
Find&Select / GoToSpecial / select/check: Visible cells only
Copy
Paste to different worksheet (fancy formatting does not stick)

28) List reports -- paragraph style / Late GovtDoc receipts
Prefer using reports that have XML/XSL output!
Useful for reports already in the Finished Reports List
MS Word files usually found with path:
C:\Program Files\Microsoft Office\Office12\WINWORD.EXE

29) List reports -- paragraph style / Late GovtDoc receipts
Make sure that you view the Report in MS Word
check the Reports / Report Session settings
Note: the title appears to be multi-line, but is really one line
When using the line-wrap option --
the line does not end in: a paragraph mark or a new line mark
Most labels appear as coded labels

30) MS Word processing / Find/Replace [1]
The ^ is a caret mark (shift-6)
Actions:
ctrl-a (highlight all)
ctrl-c (copy)
ctrl-f (find)
ctrl-o (open file)
ctrl-p (print)
ctrl-q (quit/close)
ctrl-r (replace)
ctrl-s (save)
ctrl-v (paste)
ctrl-x (cut)
ctrl-z (undo)

31) Processing steps / Phase 1 -- MS Word
Also manually remove the page heading
It takes 3 steps to insert tabs between data in the record
because the Paragraph mark is used between lines & between records
The next 2 steps inserts tabs before & after the "label"
### Processing steps

#### Phase 2 -- Excel Import (step 1 & 2)
- Open/Import file into Excel
- Process with the Text Import Wizard

#### Text Import Wizard

**Step 1**
- Choose: delimited

**Step 2**
- Choose: Tab (as delimiter mark)
  - You can choose more than one delimiter mark,
  - & also use a non-standard character, such as a pipe mark ( | )

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#### Processing steps

#### Phase 2 -- Excel Import (step 3)
- For: barcodes / some MARC tags / some Dewey#s
- Change columns containing numerical text from General to Text format--
  - Highlight column (use the bottom scroll bar to view the columns, if necessary)
  - & choose Text format

**If any of the columns imported with the “wrong” formatting,**

- You will need to import again

**Optionally, you can select unwanted columns & prevent them from importing**

**Click the finish button to import the text file into Excel**

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### Processing steps

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### List reports -- paragraph style

- Late GovtDoc receipts

**More formatting in Excel**

- Add headers to columns with data information --
  - the preceding column may have the label information
- Note: many label appear in plain text, some labels appear as a code
  - Example: the label "name" for the chronology info vs. the label "D381" for the enumeration info

**Combined columns need to be converted by using Text-to-Columns**

  - -- copies>1
  - -- claim_reason:3L>ISSUELATE

**Expand the title column to display more of the title**

**Delete unwanted columns that have no data information**

**Hide unwanted data columns**

**After reviewing/processing in Excel –**

- Remember to save using the Excel file format (.xls / .xlsx)
- Otherwise, Excel saves as text file and overwrites the existing report file
36) List reports -- paragraph style / Late GovtDoc receipts (Legacy report) [1]
Legacy reports are often formatted and cannot be rerun
Make sure that you view the Report in MS Word
check the Reports / Report Session settings
Delete Page Headers in FindAll
by copying the entire line in the formatted report
(highlight & ctrl-c) &
pasting it into the "Find what" box
(ctrl-v) &
setting the "Replace with" box to "nothing"
Two lines have data &
three lines are blank spaces all the way across

37) MS Word Processing / Find.Replace [2]
The ^ is a caret mark (shift-6)

38) List reports -- paragraph style / Late GovtDoc receipts (Legacy report) [2]
Because the title often includes a colon;
there may be unexpected tab
(as part of the title & preceding the subtitle)
Excel usually "ignores" the leading/trailing blank spaces
Be sure to save as text file

39) Late GovtDoc receipts (Legacy report)
It is easy to determine which cells have extra data and
need further processing
Refer to the Symphony Finished report to be able to
identify the coded labels preceding the data
Sort on ColumnB, then
insert blank cells & shift-right existing cells
to stack the labels / data
Repeat sorting/shifting several times,
until the data stacks correctly
Columns need headers
Hide or delete unwanted columns
Tedious, but the result is a usable table
40) Convert Text to Columns wizard  [new slide]
Data / Convert Text to Columns Wizard is very similar to the Import Text Wizard

Text to Columns
Step 1 -- choose: Fixed width
Step 2 -- accept/move/delete/create: Break lines
Step 3 -- Change columns containing numerical text from General to Text format
Highlight the unwanted column to prevent them from importing & choose Skip
Check your column counts!

When you convert the highlighted column to more that one data column--
Make sure that you first insert extra columns to the right of the highlighted column
Otherwise you will overwrite existing columns

Notice: “skipping” when converting can keep your column count the same

41) Excel formulas
Make sure that there is an empty cell/column to put the subtotals
AutoSumm includes other options for averaging & tallying counts

All functions start with the equal sign & use cell references
You can either type in the cell name, or you can select/highlight it in the spreadsheet & hit the Enter key to finish the formula

42) Advanced Excel formulas
Use AutoSum for subtotaling adjacent columns
Excel will "ignore" blank cells
When subtotaling separate cells
blank cells subtotal to " 0 ", which clutters-up the table
Use an IF/THEN formula to total only the cells containing data

Combine call# ranges by checking the "next" cell "below"
Concatenate (combine) only if there is data in both cells
Create the formulas in the first cell &
Drag the "fill handle" down the column to AutoFill every cell
Tidy up the table by hiding the unneeded data columns (ex. ColumnA, & categorized columns for staff/faculty)

Only hide the columns. Do not delete the columns,
Formulas display properly if the source data is hidden, but formulas give an ERROR is the source data is deleted.
Optionally, tidy up the table by
Sorting on the CallNo column & if necessary--deleting the blank rows
Reports! Reports! Reports!
Thank you --
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Nov. 14, 2013

43) Thanks -- Questions?

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44) Presentation revisions -- Originally presented Nov. 14, 2013

New slides:
Slide 23) Report Session / View properties
Slide 40) Convert Text to Columns wizard

Revised slides
Slide 28) List reports -- paragraph style / Late GovtDoc receipts[1]
Added line: (Prefer using reports that have XML/XSL output)
Slide 41) Excel formulas
Formula corrected: Sum function: =SUM(D15:E15)
Minor correction: Sum function: =SUM(D15:E15) --
Highlight adjacent cells (left-click & drag)
Minor correction: Sum function: =SUM(C15, F15) --
Highlight specific cells (ctrl-left-click each cell)

Minor revisions
Slide 3) What do you need/why do you need it
Corrected spelling: Categorize