

Reports Skills Checklist

Minimum Requirements

1. Know the **General Skills checklist** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288838-general-skills-checklist>) and be signed up for the appropriate **distribution list** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000284898-wyld-email-lists>).
2. Know how to set up and schedule new reports, view and modify scheduled reports, and access finished reports.
3. Know how to schedule established templates (without editing).
4. Know what time of day reports should be run and the proper timing for report scheduling (don't schedule more than one at once during the day etc.).
5. Know which reports can affect other libraries' information (use caution).
6. Know how to access context sensitive online helps.
7. Be familiar with the **Reports Technotes** (<https://wyldlibraries.freshdesk.com/support/solutions/61000133711>).
8. Know when to contact the WYLD Office.

Intermediate Requirements

1. Create and schedule new reports using established reports or by manipulating template reports.
2. Follow correct naming structures when creating templates (preface report template with three- or four-letter WYLD acronym for your library).
3. Know which reports must be run on a regular basis to maintain your library's workflow and information.
4. Understand the frequency and purpose of the different reports (e.g., 'count' versus 'list' reports).
5. Be able to incorporate finished reports into word processors or spreadsheets and be able to manipulate data in these programs.
6. Be able to distinguish between tasks better done with Analytics vs. those which require reports. For example it is better to use Analytics for the Item Statistics Report.
7. Understand the impact of configuration issues (user login etc.) on access to reports and know to contact the WYLD Office with questions on this.

Expert Requirements

1. Understand in detail the possible criteria that can be used in running a report and the effect each can have.
2. Understand how reports can draw upon data in each module (Bibliographic, Acquisitions, Circulation, etc.) and what data can be cross-referenced.
3. Understand how to use output options to change the manner in which a report shows its results.
4. Know how to troubleshoot reports using the log file or help function (do not delete a report with which you have had a problem until you are certain you no longer need the information for troubleshooting).

5. Know when to contact the WYLD Office to work on special reports that aren't available from established or template reports.
6. Know when to contact the WYLD Office to take advantage of their expertise: someone else may have already asked your question in the past and they may have the answer.
7. Know how to get **Reports SirsiDynix Manuals** (<https://wydlibraries.freshdesk.com/support/solutions/folders/61000198312>). Support Portal login required to view.

reviewed April 2019