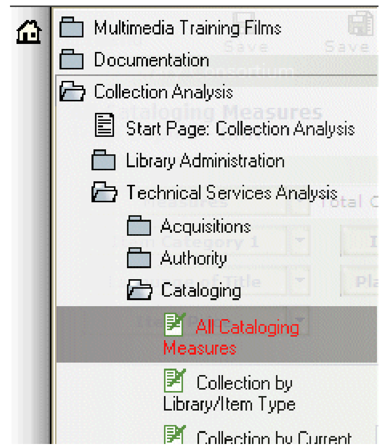
Directors Station Exercises self-paced

Login to http://ds.lib.wy.us
Contact the WYLD office if you do not know the code or password.
Use IE 9, 10 or 11, you will have occasional problems with Firefox, make sure popups are off or add ds.lib.wy.us to the allowed list. When using IE 11 turn on compatibility for ds.lib.wy.us (tools→compatibility view)

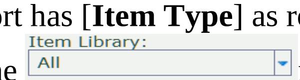
Hopefully these series of exercises will get you familiar enough with how to manipulate data in DS.



Exercise 1: Item/location count

Click the left most "SirsiDynix" menu bar (far left vertical bar), it pops out to reveal 5 menu options.

Click **Collection Analysis**
→Technical Services analysis
→Cataloging
→All Cataloging Measures
Close the SirsiDynix menu button by clicking on it again

This default report has [**Item Type**] as rows and [**Measures**] as column. Above the report is the data pool, find the 

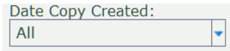
measure and click the down arrow. Click on the "+" to expand the list of library codes. Click on the "All" check box to uncheck all codes. Find your library code from this list and click the check box and click "ok" this will cause the system to re-create the report results with only counts from your library.

Change the columns from the default [**Measures**] to [**Home Location**] by locating the [**Home Location**] measure in the pool and clicking on the measure WHILE holding down the left mouse button, drag this measure down into the report area and hover it over [**Measures**], when you see the diagonal arrows, release the mouse button. Note that [**Measures**] moves to the location in the pool where [**Home Location**] was and defaults to "Total Titles", to change to total items click the down arrow in the [**Measures**] and select the "Total Copies" radio button, click "OK".

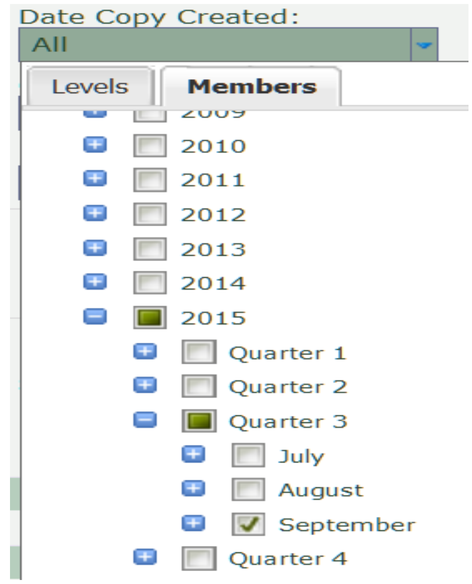
In the report area your will see "All" under [**Home Location**] column, click on this to expand or contract the list of locations. The same is true with the [**Item Type**] header; clicking "All" will expand or contract the list. This is typical of all data in the report area.

As the report is configured right now, this represents all the holdings as of last night at midnight that your library has in Symphony.

Adding Limits to the report

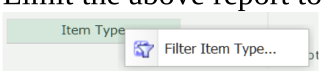
Limit the results to items added last month by finding the 

measure in the data pool.



Click the down arrow, uncheck the “All” check box to uncheck all years, click the “+” to expand the years.
Use the slider bar on the right side of this window to find today’s year.
Click the “+” next to the year to expand the quarters.
Find last month’s quarter and click the “+” to expand to last quarter’s months.
Click the check box for last month, click “OK”.

The report area now shows the counts for items added last month. This count represents those items created last month that are still in the system, it does not include an item created and then removed before last night.

Limit the above report to two item types. Click on [Item Type] , you will see


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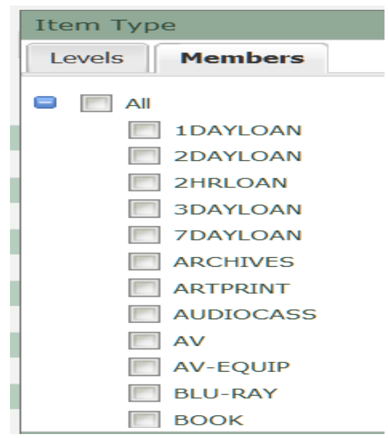

Click on this to open the Item Type window, uncheck the “All” and click the “+” you will see a list of all the item types we have defined in Symphony.

Now you may select only those item types you want in the list, click ‘OK’.

Exercise 2: Swapping Data Measures to create a date of collection report

Swap [**ItemType**] data in the report for [**Year Published**] by clicking and holding the [**Year Published**] measure in the data pool, drag it down in the report area and hover it over [**ItemType**] until you see diagonal arrows, 

then release your mouse button, [**ItemType**] is now in the data pool and maintains the item types you selected above, click on the down arrow and select “All”, click “Ok”. In the data pool click on [**Date Copy Created**] down arrow and select “All”, click “OK”. Click the down arrow on the [**Measures**] data, select ‘Total Titles’, click “OK”. In the report area click “All” under [**Home Location**] to contract the locations. The report results are now showing you counts of unique titles. Expand the [**Year Published**]. You now have a rough indication of age of collection.

Click the down arrow on [**Date Last Checked Out**] (to find this measure you may have to hover over the horizontal divide line between the measures and report are and pull that line down or use the slider on the right. Uncheck the "All" box, click the "+" to expand the list, select '2009', click "OK". The report shows counts of titles with at least one copy that circulated in 2009 (and may still be checked out) and has not circulated since. Click in the left area of one of the cells in the report and, holding down the left mouse button drag to the right. You will see a dashed box

start to appear, release the mouse button and a popup box appears with 4

list choices, select 'List Copies by Number of Total Checkouts', this will open a window with title information for the cell you have selected (since this is a list of copies there may be more copies showing than the "Title" count). There is an icon at the top left under the title. Hover over that, click on "Export", this will open a windows dialog asking if you want to save the file or open it. Click "Open" to open in Excel (or whatever your default application is set to for csv files) this is an easy way to import the data to a spread sheet for further manipulation. Note: Excel will convert the barcode number to scientific notation. To change this to a number click the cell header (usually column G) to highlight the entire column , right click and select "Format Cells", select Number and set the decimal to 0, click "OK".

Exercise 3: Create a circulation statistics report by item type and home location.

Click the SirsiDynix main menu button,
→Click Collection Analysis
→Public Services Analysis
→Circulation
→All checkout Measures (Historical),

Close the menu. Find the [Station Library] in the measures pool, click on the down arrow, uncheck the "All", click the "+" and find your library. Station Library represents the library where the circulation charge occurred, regardless of whose item was checked out at that location. Find the [Home Location] data in the pool and drag it to the report area, hover over [Measures] until you see the diagonal arrows and then release. Drag the [Item Type] data to the report, hover over [User Profile] until you see diagonal arrows and release. The resulting report represents all the "circulations" (Checkout Item, Staff Renewals, Patron Renewals, Use Item, Checkout reserve and Reserve Renewals) your library has done since January 2009. You can expand the [Home Location] and [Item Type] measures to see what in general is circulating.

Exercise 4: Items Borrowed from Other Libraries

Continuing with the current report let's see whose items you borrowed in the last fiscal year. Drag the [Item Library] measure and swap it with [Item type]. Find [FY July June] data in the pool, select the down arrow uncheck "All", click the "+" and select the last complete fiscal year, click "OK". Expand the [Item Library] by clicking on "All", notice it is in alphabetic order. Click in the [Home Location] "All" column header box not on [Home Location] itself, a popup will appear. Click ‘Sort Column Descending’, the rows now are by library whose items you checked out from most to least. Most likely your library will be at the top.

Exercise 5: Circulation count for most recent annual year by patron profile

Continuing with the current report in the data pool click on the [FY Jan Dec] down arrow, uncheck the “All” box, click the “+” and select the most complete year, if you still have [FY July June] selected click the [FY July June] down arrow and check the “All” box. Drag [User Profile] to the report area and make it the rows. Drag [Measures] to the report and make it the columns, notice that only “Total Circulation” count is showing, click on the [Measures] measure, click “Filter Measures” and select “Checkout item”, “Checkout Reserve”, ”Reserve Renewals”, “Staff Renewals”, “Patron Renewals”, “Use item” and “Library Use Transactions”. With the [Measures] in the report area you can see exactly where your circulation totals are coming from (charge, renew etc). The “Library Use Transactions” counts are not included in the ‘Total Circulation’ value. This column represents charges/renews to special patron profiles such as MISSING, DISPLAY, REPAIR. To see which of these types of profiles you have used select only “Library Use Transactions” in the [Measures] now expand [User Profile] by clicking on “All”.

Exercise 6: busiest hour of the day and day of the week.

Clear the present report by clicking “Reload” on the menu bar (between “Design” and “Info”). Pick your library under [Station Library], pull down [Day of the Week] for rows and [Hour of the Day] for columns. Expand the values in each of the columns and rows by clicking “All” under each of the measures. Limit the checkouts to just ‘Checkout Item’ and ‘Staff Renewals’. This can be done by pulling [Measures] in the pool down to the report area. Hover over [Measures] over but just below the top of [Day of Week] until you see vertical arrows, release the mouse button. Click on [Measures] to get the “Filter Measures” popup, click on that to get the list of measures, uncheck “Total Circulation” and check “Checkout Item” and “Staff Renewals”. In the data pool limit [FY Jan Dec] to the most current quarter.

Using the Calculator

Sometimes you may want to add two or more values together to get a single count. You can do this using the calculator. In this example we will add “Checkout Item” and “Staff Renewals” to get a single count of staff interaction with patrons (not exactly, if you have self-check stations those checkouts will be counted in the “Checkout Item” count). Click on “Menu” in the tool bar, hover over “Calculator” and select “New”. You will see a blank box and below that all the measures, click the “+” next to “Measure”. Find “Checkout Item” and double click on it to add it to the calculation box. Since we are adding two measures click the “+” sign, now find “Staff Renewals” and double click it to add to the calculation box. Click “OK” and give the new measure a name. Note that the format defaults to “####”, this indicates the resulting count will be treated as a number only. You will select different formats depending on the values you are adding, in the “Bills and Fines” section if you are adding monetary counts you would choose a different format. Click “OK” and the new measure is added to your report below the other two. Now you may treat this measure just like any other. To only show this in the report click on

[Measures]/Filter measures and uncheck “Checkout Item” and “Staff Renewals”, notice that your new measures is added to the bottom of the list.

Save the report by selecting “Save as” from the menu bar, give it a unique name. The system always saves to your folder, if you have subfolders you may select to add to a specific subfolder. You do have a choice to add it to Swiftlinks which is one of the panels you see when you first login. As long as you have saved a report with a calculation it will be there when you run the report again, if not you will lose that calculation.

Exercise 7: Managing reports and creating folders.

Open the SirsiDynix menu bar. Click on the ‘My Folder’ icon, the report you created above should be listed. If you click on the report it will regenerate the results. With the exception of All “Circulation Checkouts (Historical)” and “All Checkin Measures” all saved reports will regenerate results based on the previous days values in Symphony.

Managing Saved Reports

To manage saved reports click on the ‘Manage My Folder’ icon at the bottom of the menu bar, a window will pop up.

To add a folder click ‘Add item’. Another window will open, with the ‘Links’ tab open. Click on the ‘Folders’ tab. Enter any value in the Name field – preferably something that will hep you remember what the report is for, and click ‘Save’. You may continue adding folders and subfolders by selecting any folder under ‘In Folder’. To see the folders you have created, close these windows and open the SirsiDynix menu bar. Select ‘My Folder’ and you will see any folder/subfolders you have created. You may now save any report you subsequently create in any of the new folders using the ‘Save’ or ‘Save As’ menu buttons.

To move a report from one folder to another, click on the “Manage My Folder” icon. Open folders to view the reports saved. To move a report from one folder to another simply click and drag the report to the folder where you want it be moved and release.

To remove folders and reports you use the “Manage My Folder” icon. Be careful in removing folders, the system will allow you to remove folders with subfolders with reports, you can easily remove all your saved reports.