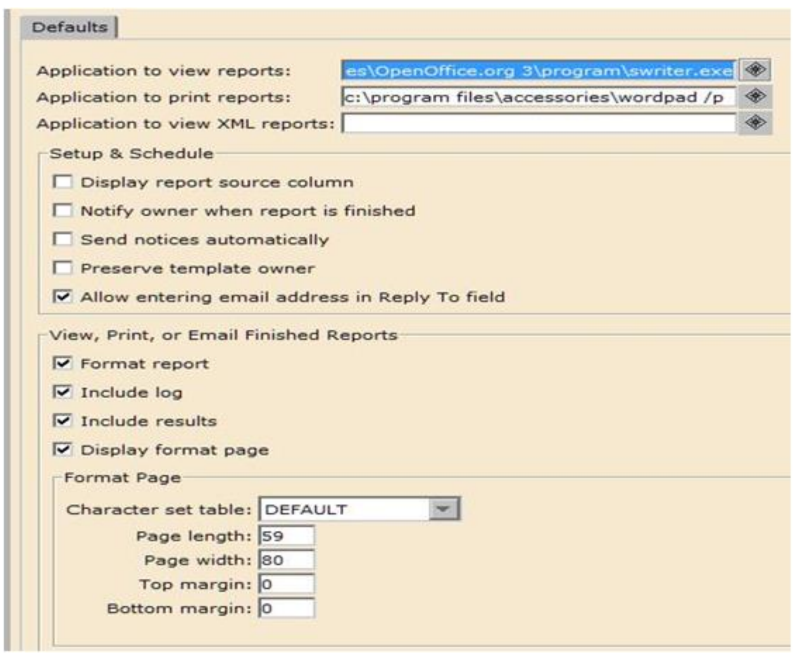
# Modifying, scheduling and retrieving Notice reports

**Getting Started** – In WorkFlows go to Help/Contents, search “New Overdue Notices Report”

## Report Session Wizard and Schedule New Reports properties

- Open the Reports toolbar, there are four report wizards.
- Click on the Report Session wizard, most report properties are now contained in this Wizard.
- Click the gadget next to "Application to view reports" and locate your application of choice.
    - Note: The location of Wordpad changed with Windows Vista/7, the location is now in c:\program files\Windows NT\Accessories or c:\program files (x86)\Windows NT\Accessories if on 64 bit version.
- For printing notice reports the WYLD office recommends using the free, open source, OpenOffice (download from openoffice.org)
    - If you choose to install OpenOffice you will want to set the "Application to view reports" to swriter.exe, found in the "program files\openoffice.org 3\program" directory (as of the current version).

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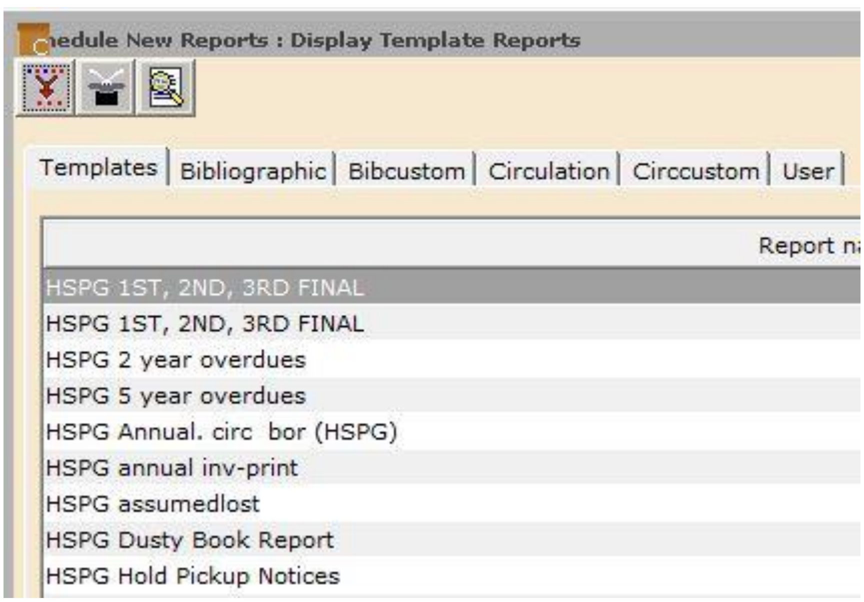
    - Set the Page length to 59, Page width to 80 and margins to 0
    - With these settings and if you have not tinkered with any default settings in OpenOffice, your notice report will align each new page at the top of the page, no page creep.
- Under Setup & Schedule you will want to check the "Allow entering email address in Reply to field",Click OK to save.
- Right click on the Schedule New Reports wizard, click Properties.

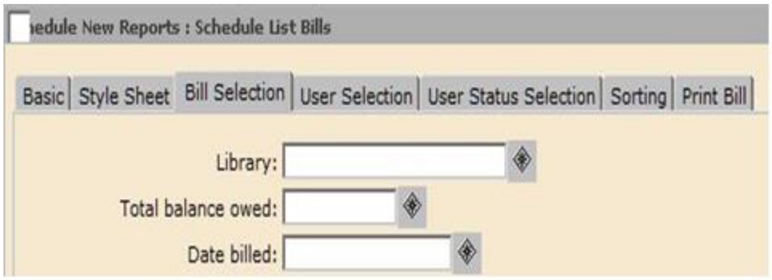
- Check the "Display notice helper" check box, click OK to save.

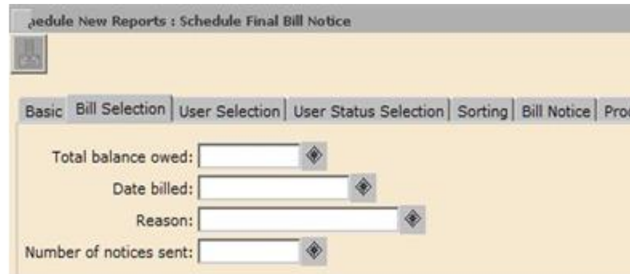
# Finding your Notice templates

- Click the "Schedule new reports" wizard in the menu. You will see a list of your saved report templates, if you have not saved any reports you will not have a Templates tab.
- Your templates folder will always be the top folder, unless you have no templates.
- You will have access only to the templates saved or created for or by your user account (e.g. WSLCIRCMGR, LCCCBIBMGR)
- Only the account that schedules and runs the report will be able to see the scheduled and finished reports.
- You may see other tabs of report groups like Bibliographic and Circulation. These are the common reports you have access to, some are password protected because they have system wide implications.
- Most of the reports are open selection, meaning if run without making modifications will select everything in the database, not just your own stuff. You will always want to look for a "Selection" tab that has the "Library:" field in it, here you will select your library before running the report.



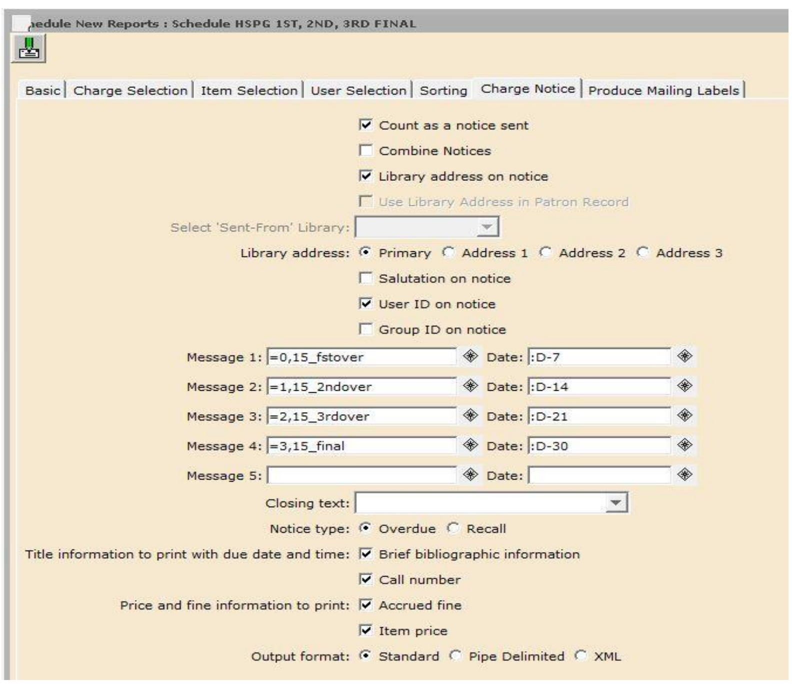

- We have endeavored to "pre-limit" reports that edit the database to already have selected your library, in this case you may not see a "Library:" field selection. See the two example images, one is just a list bills report, no harm if you select all libraries by leaving the "Library" field blank, the other is a report that creates notices and edits something in the database.
- If you plan to experiment with some of the reports be sure to click the "Selection criteria" tab in the report setup and select only your library or your branches.
- If you save a new report as a template, give it a new name under the "Report Name" field and begin the name with your library code (e.g. BHN-GREY, LCCC). This makes it much easier for the WYLD staff to view the list of templates.




# Modifying your notices template

- From the Schedul New Reports Templates tab select the template you want to modify and click the "Modify" button at the bottom of the screen.
- In general, if this is a template the WYLD Office created for you, you will not need to look at the "Selection criteria".
- For notices reports you will want to focus on the "Charge Notice" tab.
- Click the "Charge Notice" tab.

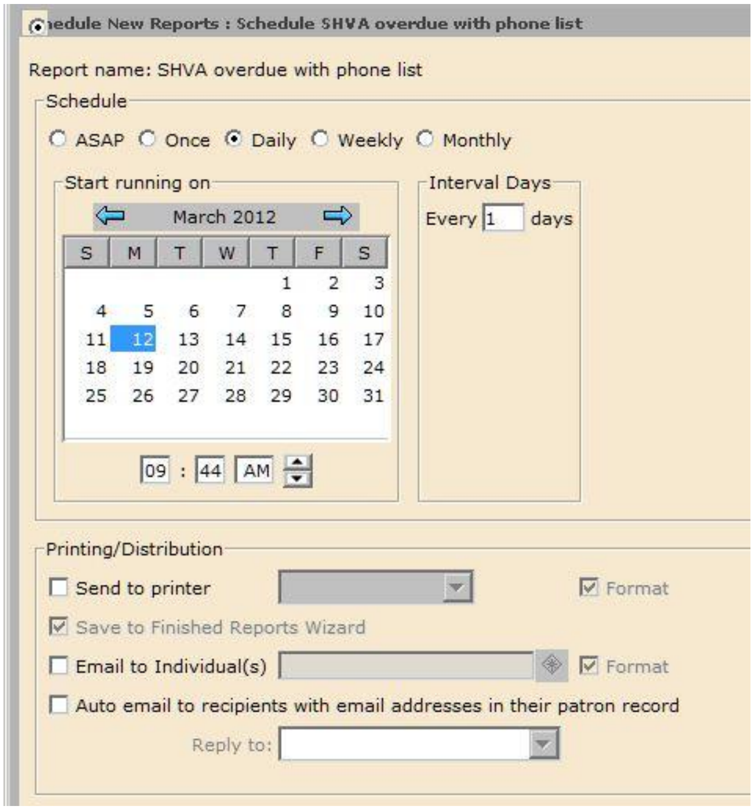



- Be sure to check the "Count as notice sent" check box.
- Select what other information you want displayed on the notice such as "User ID on notice", "Brief bibliographic information" and "Call number".
- When you have made all your choices click "ok", this will save your changes to your template. You will return to your template list.

# Scheduling a template

- Click "Schedule New Reports" wizard

- Select the template you want to schedule and click "Setup & Schedule", click "Schedule" on the next screen
- Click the "daily", button, the Every [ ] days field will default to 1




- A calendar will display with the current day and time selected.
- Select the date you want to start running the report and change the time and minute fields to "6:00" am. if this is the first notice and "6:30" am for subsequent notices.
- If you wish to send email notices check the "Auto email to recipients with email addresses in their patron record" check box.
- Please enter a valid email address belonging to your library (e.g. wslcirc@state.wy.us) in the "Reply to:" field. If you do not include one of you library's email addresses the notice will originate from "SIRSI@wyld.state.wy.us", any bounces, due to faulty email addresses, or replies from your patrons will come to the wyld office.
- Click "ok"

# Viewing scheduled reports

- To view any reports you have scheduled click the "Scheduled reports" wizard.
- You are able to modify the reports here, just as you can under the "Schedule New Reports" but it is best to remove the scheduled report, modify the template in the templates folder and reschedule as any modifications here will not be saved to the template .

- In the event that your Scheduled report gets removed you can easily reshchedule the template and be certain that your report will produce the same results.
- You can modify the scheduling of the report here by clicking "Modify" and "Schedule"

# Retrieving and printing notices

- Click the "Finished Reports" wizard. A list of your finished reports will display.
- Select your notice report and click "View"
- Uncheck the "view log" check box, you will usually only want to view the log report to discover why a report did not produce a
  result file or why you did not get the results you intended.
- If you are sending email notices you may only want to view those you will need to mail, click the "only those with no email addresses" radio button.
- Click "ok"
- The report will open in the application you chose in Report Session for viewing reports.
- If you choose a different application to view with, such as Word or Wordperfect, you will want to experiment with the page length, page
  width and margin settings on the default properties window in Workflows. With these full-body applications you can also create
  macros to do the reformating for you.

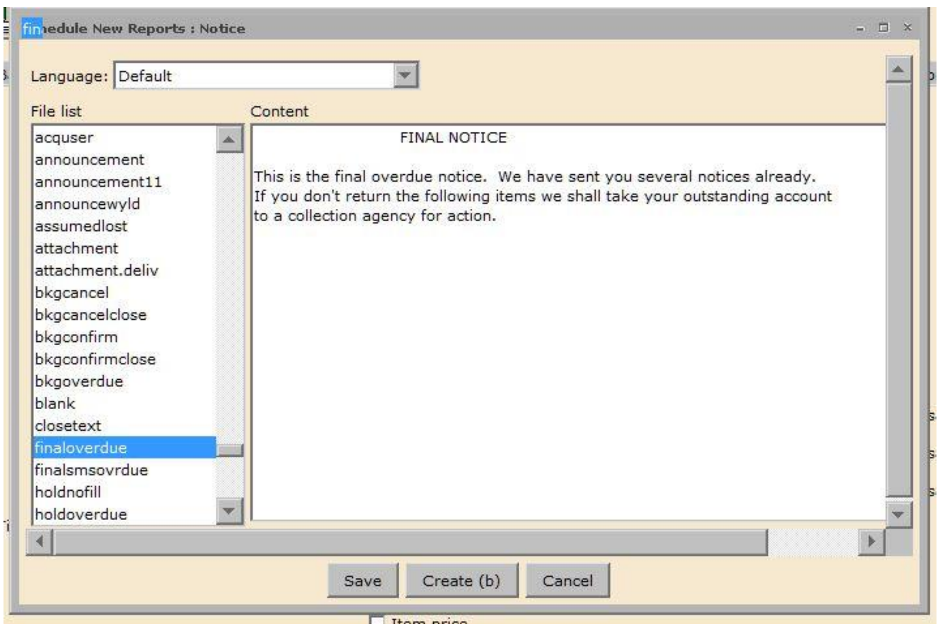
# Copying a notice template

- Why would you need to make a copy of a notice template? If you need to send a different message to different patron classes, produce
  the notice at different frequencies, send a different number of notices e.g only the first and second.
- Go to "Schedule new reports", find the notice you want to copy on the "templates" folder
- Click "Copy", give the template a unique name in the "Report name" field
- Make the modifications to the "selection criteria" and "output options"
  - For example, in the image under the "Modify your notice template" above we are producing first, second, third and final notices
    to all patrons when the item is 7 days, 14 days, 21 days and 30 days overdue. Lets say you want to send a different notice
    frequency 15TE patron class at 21 days overdue and 42 days overdue.
  - Copy the regular notice template to one called "HSPG 15TE 1ST, 2nd"
  - In the "Selection criteria" tab of the new template go to the "USER SELECTION" section and select the 15TE patron profile from the drop down list.
  - In the "Output options" tab remove message numbers 3 and 4 (blank them out) and blank out the message 3 and 4 date information fields.
  - Click the gadget next to the "Date" field for "Message 1"
  - Type "21" over the "7", click "ok"
  - Click the gadget next to the "Date" field for "Message 2:"
  - Type "42" over the "14", click "ok"
  - If you require a different message than that sent to the other patrons you will use the Notice Helper in the top left corner of the screen.
    See the secton on Using the Notice helper.
  - Save this template now by clicking "ok". You may now schedule this template as per the instructions in this Tech note.
  - You will now want to modify the template you copied and exclude profile the 15TE profile.

- Go to the templates folder and click the template you copied, in our example that would be "HSPG 1st, 2nd, 3rd Final"
- Click "modify"
- Click on the "User Selection" tab and click the gadget next to the "User profile" field.
- Click the "Excludes selected policies" radio button and select 15TE, click "ok".
- You will want to remove this template from the Scheduled list and reschdule it.

# Using the Notices helper to create and edit notice message files

- You can edit or create any message file from the "Charge Notice" tab of any notice report including the Assuemd lost report.
- Click on the helper, it opens an edit window




- To edit an existing message file use the slide bar on the File list window, be careful to only edit your own message files, as you are seeing all message files for all libraries in the list.
- When you select the file it opens in the Content window on the right, make any changes here and click Save. A window pops up with the message "Updated".
- To create a new message file click "Create", a window pops up , enter a file name, maintain the same naming convention as your other message files, usually your library 2-4 digit number followed by a descriptive name. Do not use spaces or special characters like "%,$,#".
- If the file name is accepted your cursor will be in the blank Content window, type your text and click Save.
- Your message file will now be listed when you look for it using the gadget next to any Message # field.