Reports Skills Checklist

Minimum Requirements

1. Know the **General Skills** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288838-general-skills-checklistchecklist) and be signed up for the appropriate **email distribution list** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000284898-wyld-email-lists).
2. Know the difference between the Schedule New Reports wizard, Scheduled Reports wizard, and Finished Reports wizard.
3. Know how to access the Finished Reports wizard.
4. Know how to save new report templates and modifying existing templates for your library using the Schedule New Reports wizard.
5. Follow correct naming structures when creating templates (preface report template with three- or four-letter WYLD acronym for your library).
6. Know how to schedule report templates created using the Schedule New Reports wizard.
7. Know how to view and modify scheduled reports in the Scheduled Reports wizard.
8. Know which reports you can schedule (or modify scheduled time) yourself and which reports the WYLD office should schedule or modify for you. It is recommended that the WYLD Office schedule notice reports and other reports that modify the database, such as the Edit Collection, Remove Discard, Assumed Lost, and Longoverdue reports
9. 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.).
10. Know which reports can affect other libraries' information, such as the Assumed Lost report and Longoverdue report.
11. Know how to access context sensitive online helps.
12. Be familiar with the **Reports Technotes** (https://wyldlibraries.freshdesk.com/support/solutions/folders/61000198313).
13. Know when to contact the WYLD Office for assistance.

Intermediate Requirements

1. Know which reports must be run on a regular basis to maintain your library's workflow and information.
2. Understand the frequency and purpose of the different reports (e.g., 'count' versus 'list' reports).
3. Be able to incorporate finished reports into word processors or spreadsheets and be able to manipulate data in these programs.
4. Be able to distinguish between tasks better done with Analytics vs. those which require reports. For example, it is better to use Analytics for an item shelf list report.
5. Understand the impact of configuration issues (user login etc.) on access to reports and know to contact the WYLD Office with questions on this.
6. Know how to obtain **Reports SirsiDynix Manuals** (https://wyldlibraries.freshdesk.com/support/solutions/folders/61000198312). Support Portal login required to view.

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 how to modify existing notices and create new notices for notice reports using the Notice Helper under the Charge tab in the report template.

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