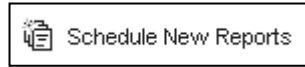


Schedule New Reports

The Schedule New Reports wizard guides you through the process of creating a "new" report.

1. **Click** on Reports Wizard Group.
2. **Click** on Schedule New Reports Wizard.



Schedule New Reports: Display Template Reports screen displays

3. **Click** the tabs to see lists of reports in each group. You will only see the reports you have been granted access, based on your login.



NOTE: The Templates tab displays a list of reports that you saved as templates. If there are no report templates saved, the tab does not display.



4. **Select** the report to run:
 - a. **Click** on the selected report, the title will turn blue.
 - b. **Click** on Setup & Schedule Button at the bottom of the screen.
OR
 - b. **Double click** the name of the report you wish.

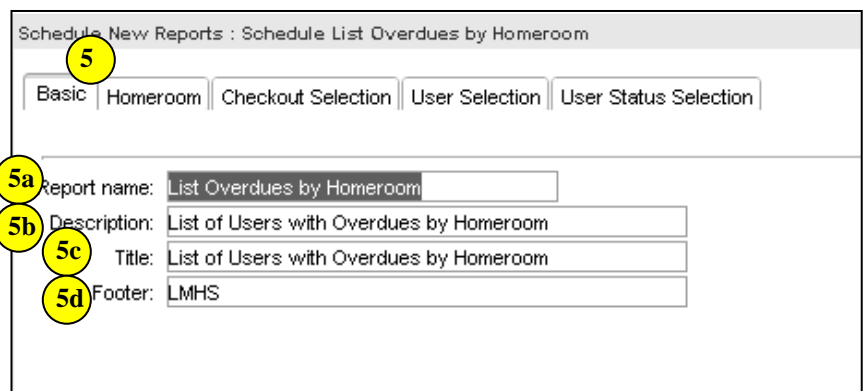
Schedule New Reports: (report name) screen displays.

NOTE: You create a report by selecting each tab to choose the criteria for your report.

5. **Select** Basic Information Tab.

Any of the following may be changed.

- a. Report Name: This name displays in the finished or scheduled report lists. It is also the name displaying in the new report or template list, if left unchanged.
- b. Description: This field describes the report results. The default value describes the report if it is run without making any changes to the selections or output options. This is also a good place to put notes to yourself about special margin settings if you're saving it as a template.
- c. Title: This title displays on the first line of each formatted page of the printed report. The date and time that the report was produced follows the title.

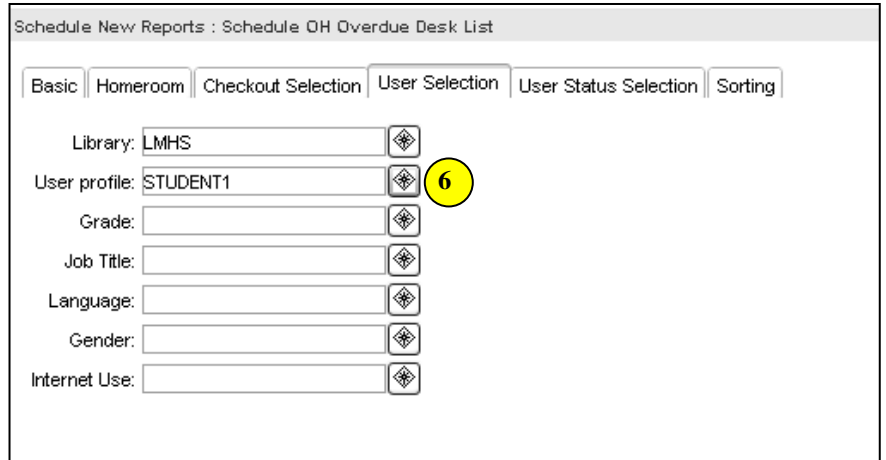


- d. Footer: When used, this field displays on the last line of each formatted page of the printed report. It can be used to record a date or range of dates that a report covers. Footers are optional.

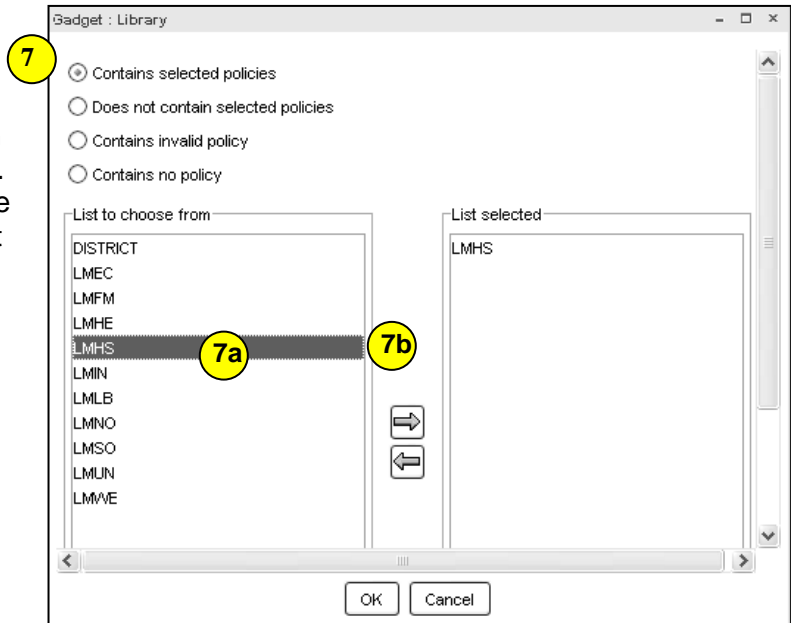
NOTE: The options you see on the tabs will vary depending on the report you select. Always use the gadget, where available, for selecting criteria.

User Selection Screen

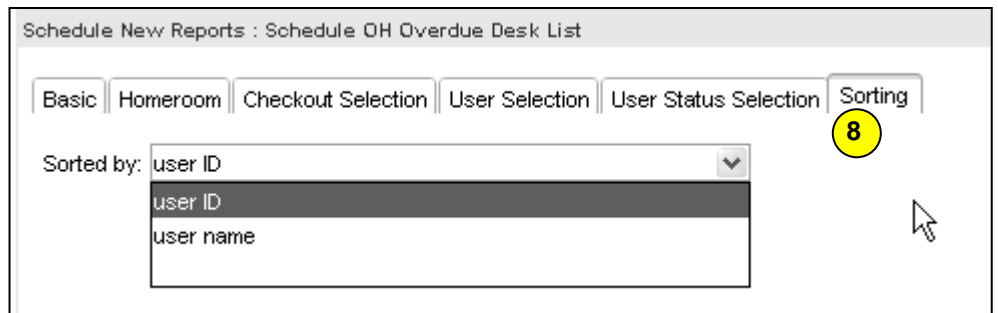
6. User selection allows for user criteria to be added. **Click** on the gadget next to the entry box for your selection.



7. Common Gadget for selecting your library.
a. **Click** on the appropriate selection in the left column (List to choose from). **Click** on the arrows to add or remove selections from the right column (List selected).
- OR
- b. **Double click** on your selection.



8. Sorting tab allows for sorting your report lists. **Use** the drop down menu to make your selection.



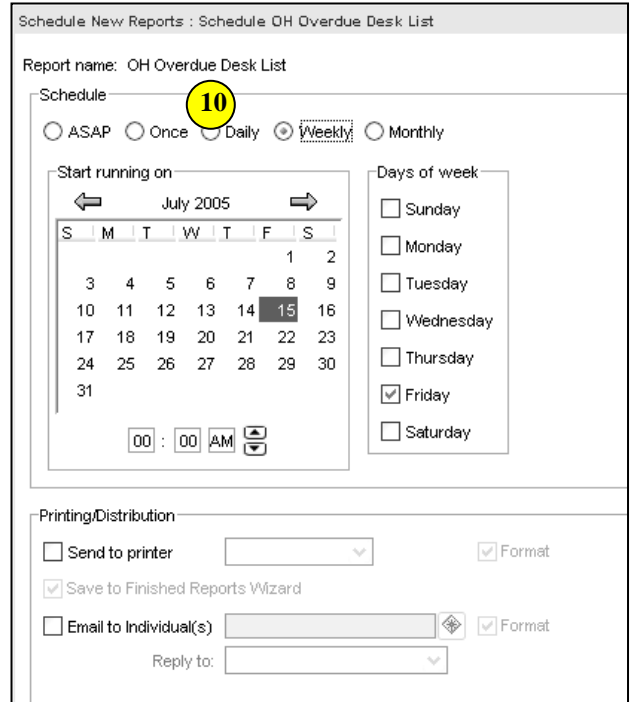
9. When you have the criteria for your report completed, **select** one of the options from the bottom of the screen:



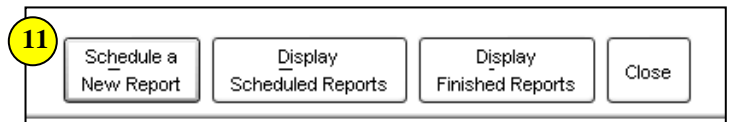
- Schedule – Will allow you to schedule future dates to run.
- Run Now – Will run this report immediately.
- Save As Template – This button will allow you to save this report with your settings as a template. (Name the report to help identify the options you have chosen.)
- Cancel – Will cancel this report settings.

10. **Select** a Schedule Option if you want to run the report at a later time:

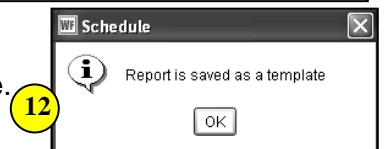
- ASAP and Schedule will run the report immediately.
- Once -This selection assumes that you want to run the report only one time, and does not save a copy of your selection.
- Daily - This selection is most useful for reports that are run every day or every so many days.
- Weekly - This selection allows you to schedule specific days of the week.
- Monthly - This selection allows you to schedule a report to run on a specific date or dates of the month, such as the 1st, or the 1st and 15th. If you select 31, the report will be scheduled for the actual last day of every month.
- Send to Printer – **This selection is not currently available.**
- Save to Finished Reports Wizard – This selection will add this run report to the Finished Reports List. The finished list accesses reports that have been run so that they may be viewed, printed, emailed, or saved as a word processing document.
- Email to Individual(s) – This selection will send the report by email to any email address you enter. Click the email gadget to enter the address. Reply to: (enter your email address here for replies)
- All emails originate from – **This selection is not currently available** – will always be from “sirsi”.
- Format – This selection is a system predefined format for the report and email. **Verify** that the format option boxes have a check (should always be checked unless noted in report instructions, which are found on the BASIC tab of the report).



11. Run Now Option – will run the report immediately. Report screen will display with the report information. Choose your next action from the bottom buttons.



12. Save as a Template – will save your report settings in a template for later use.



13. Cancel will take you back to the Schedule New Report screen.