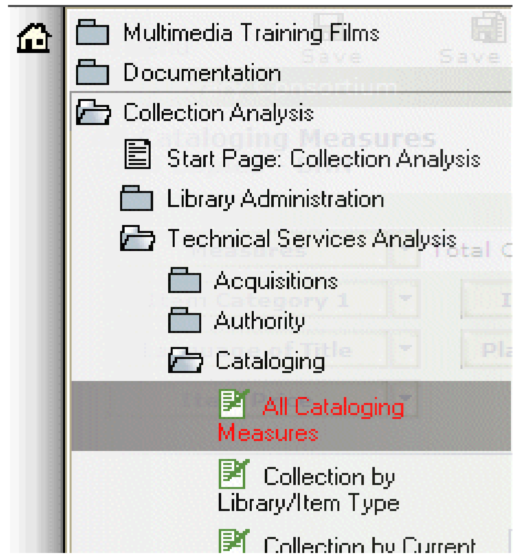
Director's Station Exercises

Login to http://ds.lib.wy.us
Contact the WYLD office if you do not know the code or password.
Use Internet Explorer 7, if you can as you may have occasional problems with Firefox and IE8,
Make sure popups are off or add ds.lib.wy.us to the allowed list.
If using IE 8 turn on compatibility for ds.lib.wy.us (tools→compatibility view)

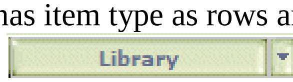
Exercise 1: Item/location count

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



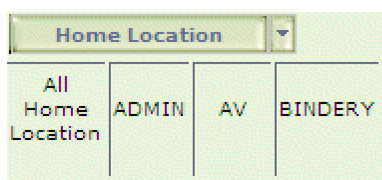
Click **Collection Analysis**
→Technical Services analysis
→Cataloging
→All Cataloging Measures

Close the SirsiDynix menu button by clicking on it again.

This default report has item type as rows and home location as columns. Above the report is the data pool. Find the 

button and click the down arrow to see other options for the library limit, such as library branches. Your library should be selected by default.

In the report area hover your mouse over the [**All Home Location**] button. Click on the down arrow and notice how the location values will contract or expand in the horizontal part of the report, depending on the checkboxes you check or uncheck.



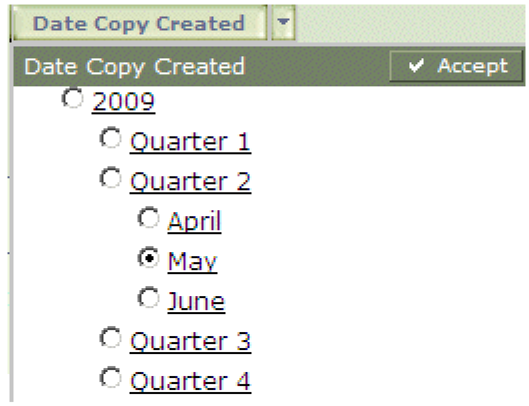
The same is true with the [**All Item Type total**] columns. This behavior is typical of all data in the report area.

The default version of this report represents all the holdings that your library has in Symphony (WYLD), as of the previous night at midnight.

Adding Limits to the Default Report:

Limit the results to **items added last month** by finding the 

measure in the data pool.

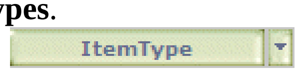


Click the down arrow
Slide the right hand bar down until you find **2009**.
Click on the underlined **2009**.
Click on the underlined **Quarter 2**.
Click the radio button next to **May**.
Click '**Accept**' at the top of the data box.

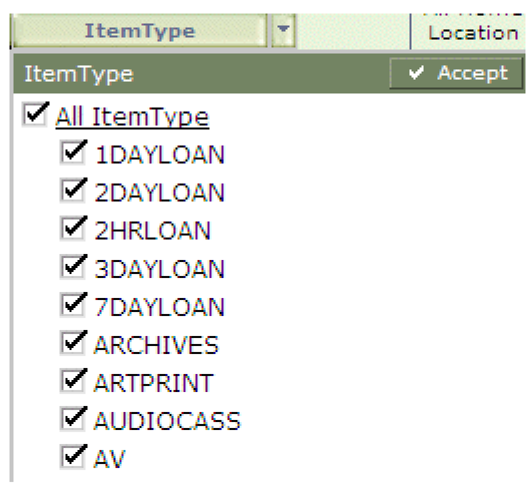
The report area now shows the counts for items added in May 2009. To remove the limits, simply scroll back up to the top of the list of years and select the radio button next to 'All Date Copy Created'

Note: *This count represents those items created in May 2009 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 the black down arrow next to the 

measure.



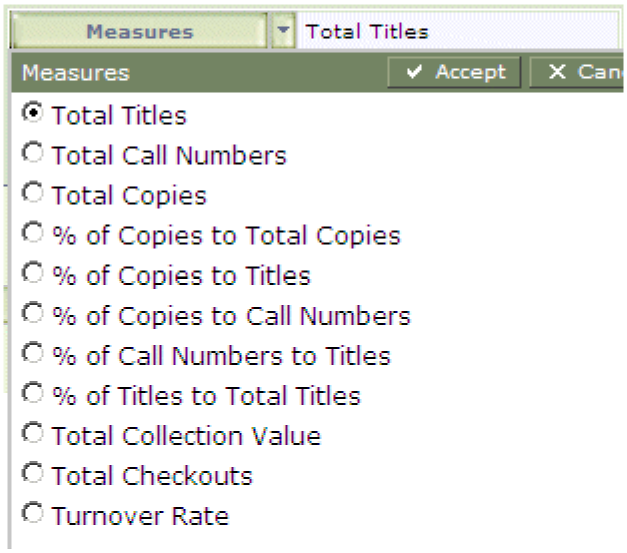
You will see a list of all the item types defined in Symphony. All are checked.
To quickly uncheck them all so you may select only 2, click the underlined '**<u>All ItemType</u>**' value to collapse the list.

Click on the check box to uncheck it. Now click on '**<u>All ItemType</u>**' to expand the list. All items underneath will be unselected.

Now you may select only those item types you want in the list, click 'Accept' to save changes.

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 button in the data pool, drag it down in the report area and hover it over ItemType without releasing the mouse button. As you hover over the measures, you will see messages for '**insert before**', '**insert after**' or Swap appear. When you see the yellow 'swap' button, release the mouse button, Item type is now in the data pool above the report and has reverted to its default 'All item types'. The Year Published measure is now in the report area.



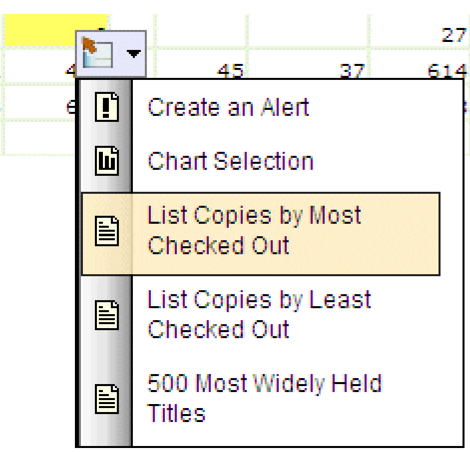
In the data pool, click the [**Date Copy Created**] down arrow and notice that '**All Date Copy Created**' is selected.

Click the down arrow on the Measures data button.

Select 'Total Titles' and click Accept.
The report results are now showing counts of unique titles.

Expand the Year Published measure to see a rough indication of age of collection by clicking on the underlined '<u>All Year Published</u>' link.

Click the down arrow on [**Date Last Checked Out**] measure in the data pool and select '2008', click Accept. The report shows counts of titles with at least one copy that circulated in 2008 (and may still be checked out) and has not circulated since.

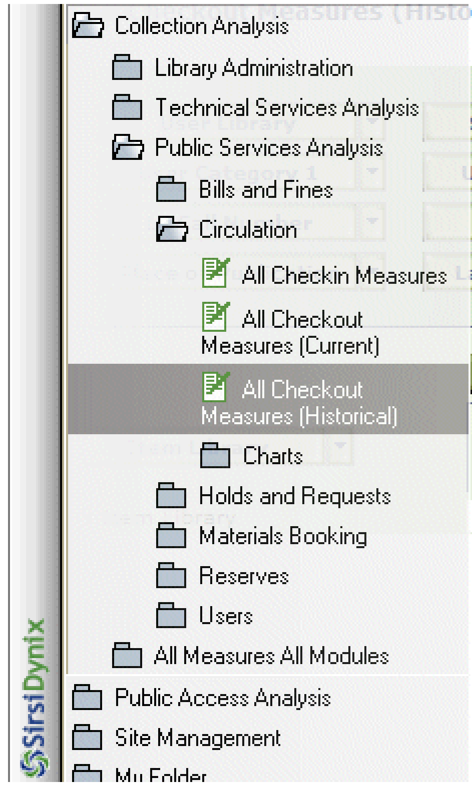


Click on one of the cells in the report. It turns yellow and a popup box appears with 5 choices. Select '**List Copies by Most Checked Out**'. A new window will open with title information for the cell you have selected.

Click the Export button Export at the top left corner of the window to open 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.

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



Click the SirsiDynix main menu button.

Click Public Services Analysis
→Circulation
→All checkout Measures (Historical)

Close the menu by clicking on the leftmost part of the vertical bar where the SirsiDynix logo appears.

Find the Home Location measure in the pool and drag it to the report area, hover over Measures until you see Swap and then release.

Drag the ItemType measure to the report, hover over Item Library until you see Swap and release.

Find the Station Library measure in the pool, click on the down arrow and notice it defaults to your library. Station Library represents the library where the circulation charge occurred, regardless of whose item was checked out at that location.

The resulting report represents all the "circulations" (charge, staff renew, patron renew, use item and reserve checkouts) your library has done since July 2002.

Exercise 4: Items Borrowed from Other Libraries

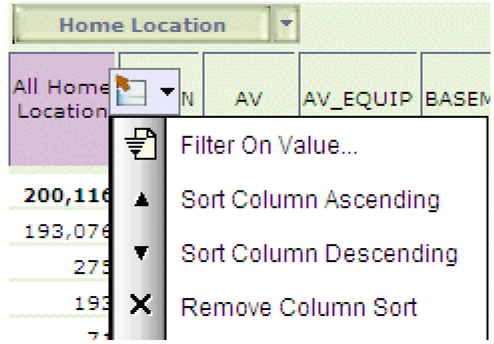
Let's see whose items you borrowed in FY2009. Click and drag the Item Library measure and swap it with the ItemType measure so that Item Library is the vertical measure (y-axis) in the report area.

Find FY July June in the pool, select the down arrow and select '2009', click 'Accept'.

In the report area, expand the Item Library measure by clicking on '**All Item Library**'.

Notice it is in alphabetic order

Click in the 'All Home Location' column header box but not on the words '**All Home Location**', the box will turn purple and 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 annual year 2009 by Patron Profile

If you still have FY July June selected, check the '**All FY July June**' radio button to remove that limit. In the data pool limit by FY Jan Dec select **2009**, In the data pool, the FY measure will now look like this: FY Jan Dec 2009 / All FY Jan Dec Now, click and drag the User Profile measure to the report area and swap it with the existing measure for the rows (vertical). Click and drag the Measures button to the report area and swap it with the existing measure for columns (across). Now that the Measures value is in the report area you can see exactly where your circulation totals are coming from with the values in each column (charge, renew etc). You may need to click the underlined 'All User Profile' link to expand the rows to show all the profiles.

Note the column '**Library Use Transactions**' These counts are not included in the '**Total Circulation**' value. This column represents charges/renews to special patron profiles such as MISSING, DISPLAY, REPAIR which do not count as charges (increment the charge counter).

To see which of these types of profiles you have used select only '**Library Use Transactions**' in the Measures by clicking the down arrow next to the measure and unselecting all values except Library Use Transactions.

Now expand User Profile by clicking on 'All User Profile'. You may view these titles by clicking on a cell (or highlighting a group of cells by clicking and dragging your mouse) and selecting '**List Library Use Transactions**'

Exercise 6: Busiest hour of the day and day of the week in June 2009

Clear the present report by clicking the 'Reset report' icon on the menu bar, at top right 

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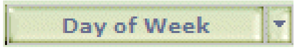
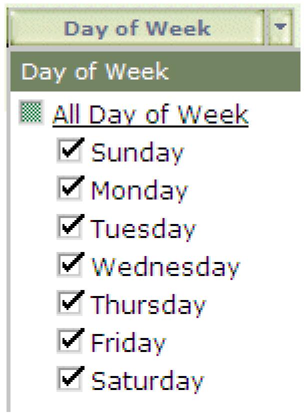
Click and drag the 

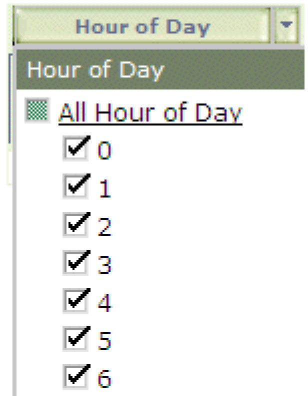
measure and swap for the existing measure for rows (vertical). Click and drag the 

measure and swap for the existing measure for columns (horizontal).

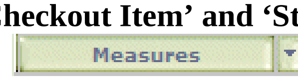
Expand the values in each of the columns and rows by clicking the down arrow next to each measure and un-checking '**All day of the week**' and '**All hour of day**'.

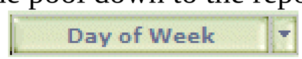
The report will expand all these values in the report area.

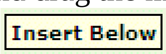




Limit the checkouts to just 'Checkout Item' and 'Staff Renewals'.

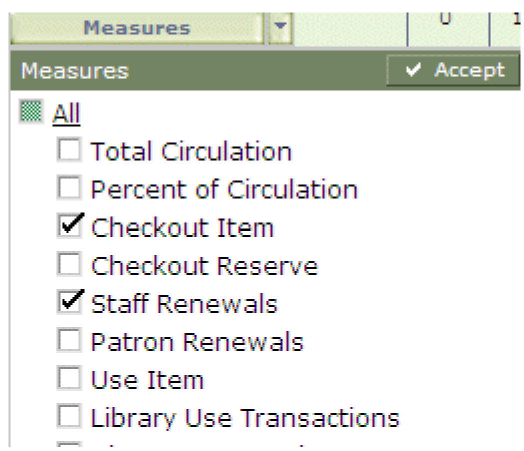
This can be done by pulling the 

value from the pool down to the report area. Click and drag the measure into the report area and hover over 

until you see 

. Let go of the mouse button and wait for the report to refresh.

Add limits to the report by clicking the down arrow in the **Measures** value and unchecking '<u>All</u>'. It's easiest to do this by collapsing the list (click on <u>All</u>) and unchecking the box next to <u>All</u>. Expand the list again by clicking on <u>All</u>, and everything underneath will be unchecked. Then only add checkmarks to the values you want to see. In this example those values are '**Checkout Item**' and '**Staff Renewals**'.



In the pool limit 

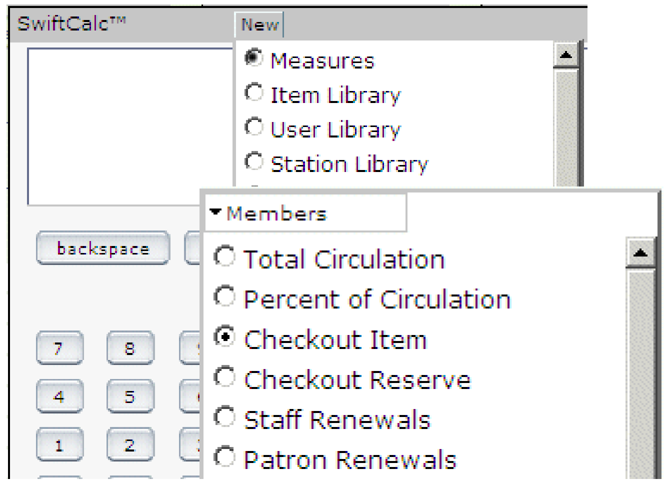
to 2009→ Quarter2→ June.

Using the Calculator.

Usually, when a measure is left above in the pool, you can only select one item from it. To see multiple items, you need to move the measure into the report space. There are times when you don't want to have multiple measures in the report space to keep your report as simple as possible. This is an occasion when using the ‘Calculator’ is helpful. Find the Calculator icon on the menu bar. 

Click and drag the 

value back to the pool. You now have just Hour of Day and Day of Week in the report space.



Click on the ‘Calculator’ icon.

Click ‘New’

Select ‘Measures’

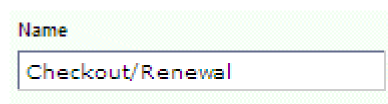
Select ‘**Checkout Item**’. You will see (checkout item) appear in the large white box above the number pad in the calculator.

Click the plus sign 

on the calculator

Select ‘Staff Renewals’. The calculator space will now look like this:

(Checkout Item) + (Staff Renewals)



To the right of the ‘Members’ selections, there is a place to enter the name for the calculation. In the Name field enter any name you wish to call this sum of those two values, e.g. ‘Checkout/renewal’.

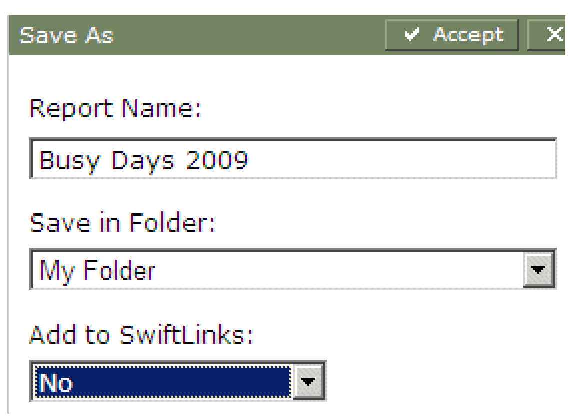
Click ‘Save’.

Click the down arrow on 

in the pool and notice that you can now see the calculation you just created. Select the name you gave your calculation by clicking the radio button next to it. Notice the values in the report have a decimal and two zero’s.

Click the ‘Calculator’ again and click ‘edit’. Click the down arrow under the Format field and select “#”
Click Save to save this change to the calculation.

Saving the Report.



To save your calculation for this report, you must save the report.

Save the report by selecting 

from the menu bar

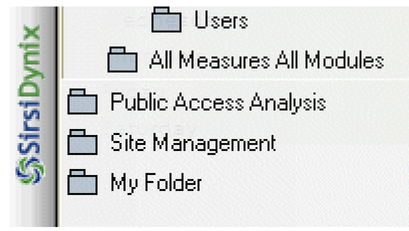
Give the report a unique name.
Save in **My folder**.

Add to Swiftlinks set to ‘no’. (Swiftlinks set to ‘yes’ will add this report to your dashboard)

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.

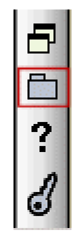
Exercise 7: Managing reports and creating folders

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.

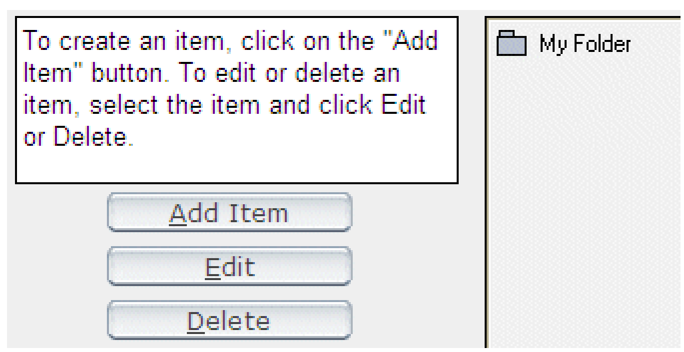


With the exception of **All Circulation Checkouts** (Historical) (and All checkin Measures), all saved reports will regenerate results based on the previous day’s values in Symphony.

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. (see below)



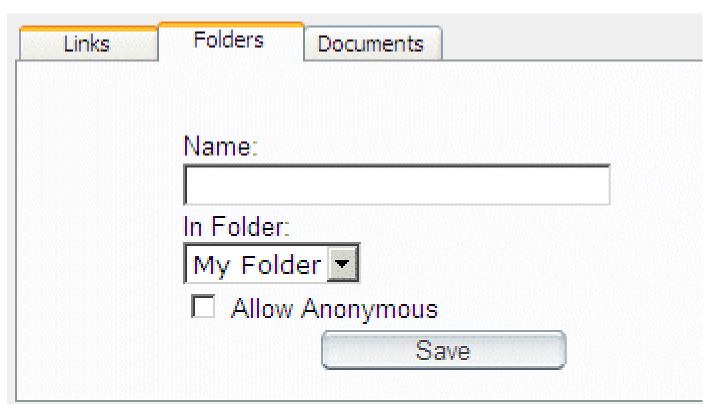
To add a folder click the ‘**Add item**’ button.



Another window will open, with the ‘**Links**’ tab open.

Select the ‘**Folder**’ tab.

Enter any value in the Name field – preferably something that will help 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 reopen 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 reports, if the report you are looking for is not in the root folder. Simply click and drag the report to the area where you want it to be moved to and release.

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