

# **LS2 Reports Training Handout**

Version 4.2.0.036



## Table of Contents

<b>Table of Contents .....</b>	<b>i</b>
<b>Login .....</b>	<b>2</b>
<b>Access Reports .....</b>	<b>3</b>
<b>Set Preferences .....</b>	<b>4</b>
<b>Run a Report.....</b>	<b>6</b>
<b>Save a Report .....</b>	<b>7</b>
<b>Schedule a Report.....</b>	<b>8</b>
<b>Modify Report Output .....</b>	<b>10</b>

# Section 1

## Login

### Learning Objectives

After completing this section, you will be able to:

- Log in to **LS2 Reports**

### Getting Started

Log in to **LS2 Reports** by entering:

*http://localhost/LS2Reports*, replace *localhost* in address bar with your web server name.

Type your **User ID** and **Password** with the same credentials used for **LS2 Staff**.

A screenshot of the LS2 Reports login dialog box. The dialog has a title bar with "LS2 Reports" and a "Help" button with a question mark icon. Below the title bar, it says "Please type your credentials for authentication." The "Namespace:" is set to "LS2 Authentication". There are two input fields: "User ID:" and "Password:". At the bottom, there are "OK" and "Cancel" buttons.

LS2 Reports

Help ?

Please type your credentials for authentication.

Namespace:  
**LS2 Authentication**

User ID:

Password:

OK Cancel

# Section 2

## Access Reports

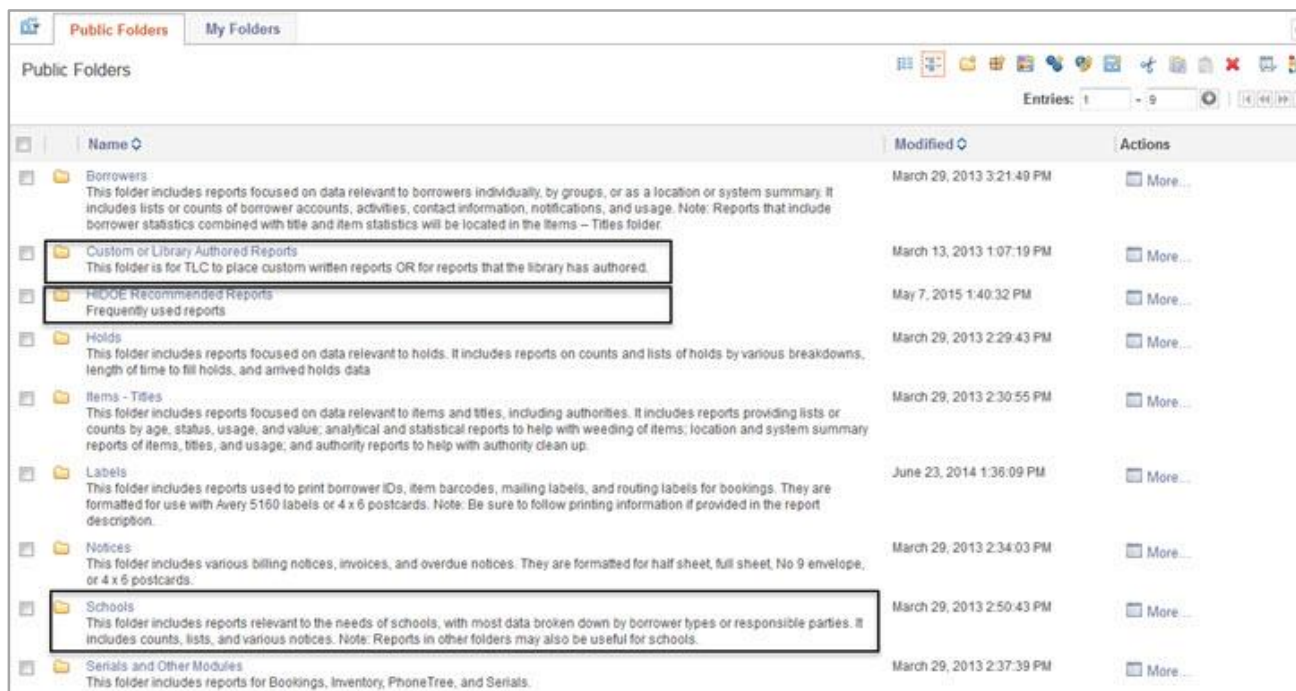
### Learning Objectives

After completing this section, you will be able to:

- Access your pre-authored and stored reports

### Getting Started

After logging in, by default, the **Public Folders** tab displays. This tab contains all of your stored reports. Use the **My Folders** tab to store your most used reports. Custom reports are stored in the *Custom* or *Library Authored Reports* folder under **Public Folders**. Frequently used reports are found under *HIDOE Recommended Reports*.



Name	Modified	Actions
<b>Borrowers</b> This folder includes reports focused on data relevant to borrowers individually, by groups, or as a location or system summary. It includes lists or counts of borrower accounts, activities, contact information, notifications, and usage. Note: Reports that include borrower statistics combined with title and item statistics will be located in the Items - Titles folder.	March 29, 2013 3:21:40 PM	More...
<b>Custom or Library Authored Reports</b> This folder is for TLC to place custom written reports OR for reports that the library has authored.	March 13, 2013 1:07:19 PM	More...
<b>HIDOE Recommended Reports</b> Frequently used reports	May 7, 2015 1:40:32 PM	More...
<b>Holds</b> This folder includes reports focused on data relevant to holds. It includes reports on counts and lists of holds by various breakdowns, length of time to fill holds, and arrived holds data.	March 29, 2013 2:29:43 PM	More...
<b>Items - Titles</b> This folder includes reports focused on data relevant to items and titles, including authorities. It includes reports providing lists or counts by age, status, usage, and value; analytical and statistical reports to help with weeding of items; location and system summary reports of items, titles, and usage; and authority reports to help with authority clean up.	March 29, 2013 2:30:55 PM	More...
<b>Labels</b> This folder includes reports used to print borrower IDs, item barcodes, mailing labels, and routing labels for bookings. They are formatted for use with Avery 5160 labels or 4 x 6 postcards. Note: Be sure to follow printing information if provided in the report description.	June 23, 2014 1:36:09 PM	More...
<b>Notices</b> This folder includes various billing notices, invoices, and overdue notices. They are formatted for half sheet, full sheet, No 9 envelope, or 4 x 6 postcards.	March 29, 2013 2:34:03 PM	More...
<b>Schools</b> This folder includes reports relevant to the needs of schools, with most data broken down by borrower types or responsible parties. It includes counts, lists, and various notices. Note: Reports in other folders may also be useful for schools.	March 29, 2013 2:50:43 PM	More...
<b>Serials and Other Modules</b> This folder includes reports for Bookings, Inventory, PhoneTree, and Serials.	March 29, 2013 2:37:39 PM	More...

# Section 3


## Set Preferences

### Learning Objectives

After completing this section, you will be able to:

- Set your view

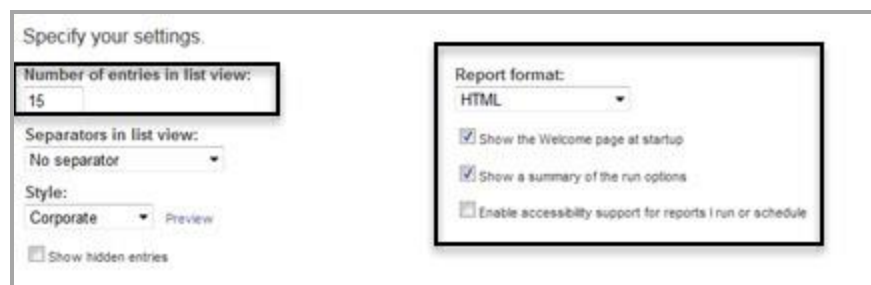
### Getting Started

Use **Set preferences** to set your default report output format. Under **My Area Options**  drop-down list, click **My Preferences**.



The **Set preferences** page displays. Areas to consider modifying:

- **Number of entries in list view** - increase the number of reports returned per page by changing this value. The default is set to 15.
- **Report format** - sets the default format for output generated. The default is *HTML*. TLC recommends changing this selection to *PDF*.


 A screenshot of the 'Specify your settings' page in the LS2 Reports application. The page contains two main sections. The left section, titled 'Specify your settings', includes a text input for 'Number of entries in list view' (set to 15), a dropdown for 'Separators in list view' (set to 'No separator'), a dropdown for 'Style' (set to 'Corporate'), and a checkbox for 'Show hidden entries'. The right section, titled 'Report format', includes a dropdown menu (set to 'HTML') and three checkboxes: 'Show the Welcome page at startup' (checked), 'Show a summary of the run options' (checked), and 'Enable accessibility support for reports I run or schedule' (unchecked). Both the 'Number of entries in list view' input and the 'Report format' dropdown are highlighted with black boxes.

- **Default view** - provides the option to select *List* or *Details*, located under the **Portal** section.

Set preferences

General Personal Portal Tabs

Specify your settings.

Number of entries in list view:  
15

Separators in list view:  
No separator

Style:  
Corporate

Show hidden entries

Report format:  
HTML

Show the Welcome page at startup

Show a summary of the run options

Enable accessibility support for reports I run or schedule

Portal

Default view:  
☐ List  
☒ Details

Regional options

Product language:  
☒ Use the default language  
☐ Use the following language:  
Catalan

Content language:  
☒ Use the default language  
☐ Use the following language:  
Afrikaans

Time zone:  
☒ Use the default time zone  
☐ Use the following time zone:  
(GMT-05:00) Eastern Time: Ottawa, New York, Toronto, Montreal, Jamaica, Porto Acre

Enable bidirectional support

Base text direction for content:

OK Cancel

After making your modifications, click **OK** to retain your changes.

# Section 4

## Run a Report

### Learning Objectives

After completing this section, you will be able to:

- run a report
- view the report output

### Getting Started

To run or view a report, locate the report you want under **Public Folders**. Click the **Name** of the report. You may need to make several selections as you drill down to the specific report. The prompts screen displays if any parameters need set up to run your report. Make your selections, and then click **Finish**. If **Finish** is not enabled, make sure you have made a selection for each option.

The screenshot displays the LS2 Reports web application. The top navigation bar shows 'Public Folders' and 'My Folders'. The main content area lists several reports under the 'Public Folders > Schools > Notices' path. The first report, 'Borrowers and Items Checked Out by Responsible Parties', is highlighted. A detailed view of this report is shown in the foreground, featuring configuration options for 'Select Borrower Location', 'Select Borrower Type(s)', 'Select Items to Display', 'Display Replacement Cost', 'Display Borrower ID', and 'Enter Responsible Party ID (Optional)'. The 'Borrower Location' is set to 'Location', 'Borrower Type(s)' is empty, 'Items to Display' includes 'Items Out', 'Replacement Cost' is checked, 'Borrower ID' is set to 'BorrowerID', and 'Responsible Party ID' is left blank.

# Section 5

## Save a Report

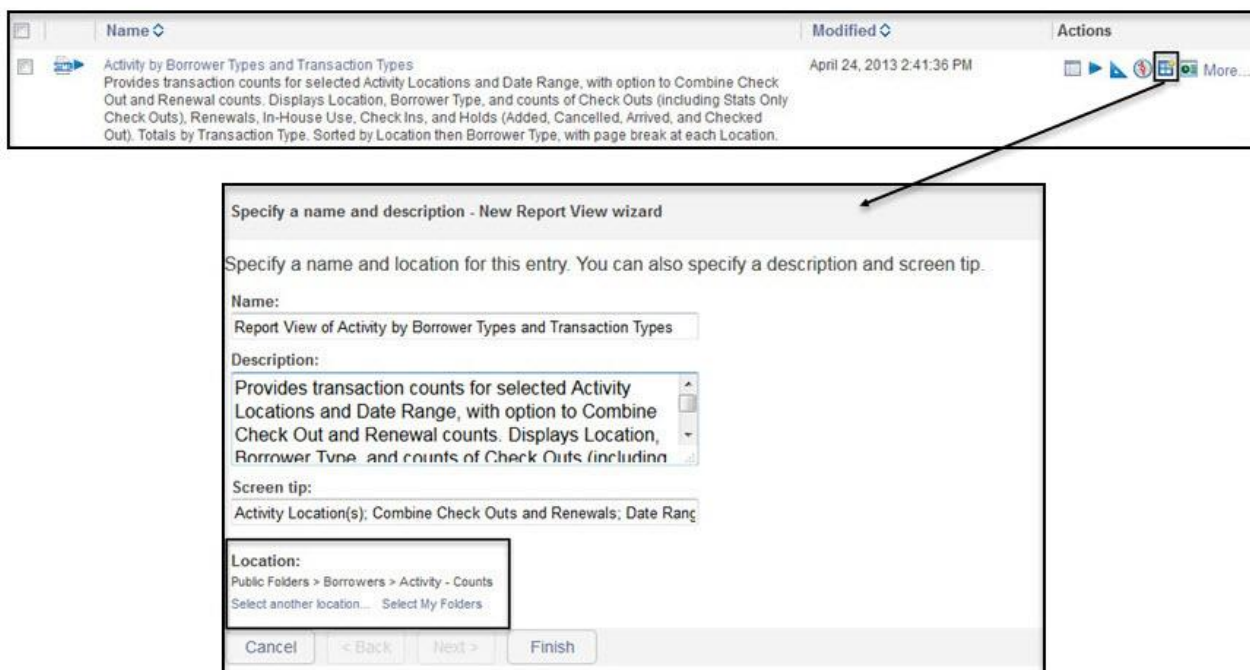
### Learning Objectives

After completing this section, you will be able to:


- Save a report

### Getting Started

Navigate to the report you want to save. Under **Actions**, click the **Create a report view**  icon.



Options are presented to rename, change the description, or add a screen tip. Under **Location**, click *Select My Folders*, and then click **Finish** to place the report into My Folders. In My Folders

click the *New Folder* icon  to name the folder, add description, or add the folder to My Folders or another location.



# Section 6

## Schedule a Report

### Learning Objectives

After completing this section, you will be able to:

- Schedule a report

### Getting Started

To schedule a report to run, locate the saved report in **My Folders**. Next, click the **Schedule** icon under **Actions**. The **Schedule** page opens.



Schedule - Report View of Authors by Check Out Counts

Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule without losing any of its details.

☐ Disable the schedule

Priority: 3

Frequency:  
Select the frequency by clicking on a link.

By Day By Week By Month By Year By Trigger

Every 1 week(s) on:

☐ Monday ☒ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Daily Frequency:

☐ Every 1 Minute(s) between 9 : 00 AM and 5 : 00 PM

Start: Jun 23, 2015 1 : 53 PM

End: ☒ No end date ☐ End by: Jun 23, 2015 1 : 53 PM

Credentials:  
TLC (TLC)

Options

☐ Override the default values

Formats:  
Default

Accessibility:  
Default

Languages:  
Default

Delivery:  
Save the report

Prompt values

☐ Override the default values  
No values saved

OK Cancel

In the **Frequency** section, select how often you want the report to run. You can schedule the report

to run **daily**, **weekly**, **monthly**, **yearly**, or **by trigger**. *By Trigger* is based on an occurrence, such as a database refresh. The occurrence acts as a trigger, causing the entry to run.

**Frequency:**  
Select the frequency by clicking on a link.

By Day   **By Week**   By Month   By Year   By Trigger

Every  week(s) on:

☐ Monday   ☒ Tuesday   ☐ Wednesday   ☐ Thursday  
☐ Friday   ☐ Saturday   ☐ Sunday

**Daily Frequency:**

☐ Every  Minute(s) between  and

In the **Start** section, set the date and time you want the frequency to start. Under the **End** section, select **No end date** if you want to allow the scheduled report to run indefinitely. Select **End by** to set an end date.

**Start:**

**End:**

☒ No end date  
☐ End by:

In the **Options** section, select the **Override the default values** check box if you want to change the format, accessibility, language, or delivery setting.

In the **Prompt values** section, select the **Override the default values** check box if you want to override the default prompt values. If no values are saved, you can set them, if desired.

When you are finished updating, click **OK**. You are returned to **My Folders**.

# Section 7


## Modify Report Output

### Learning Objectives

After completing this section, you will be able to:

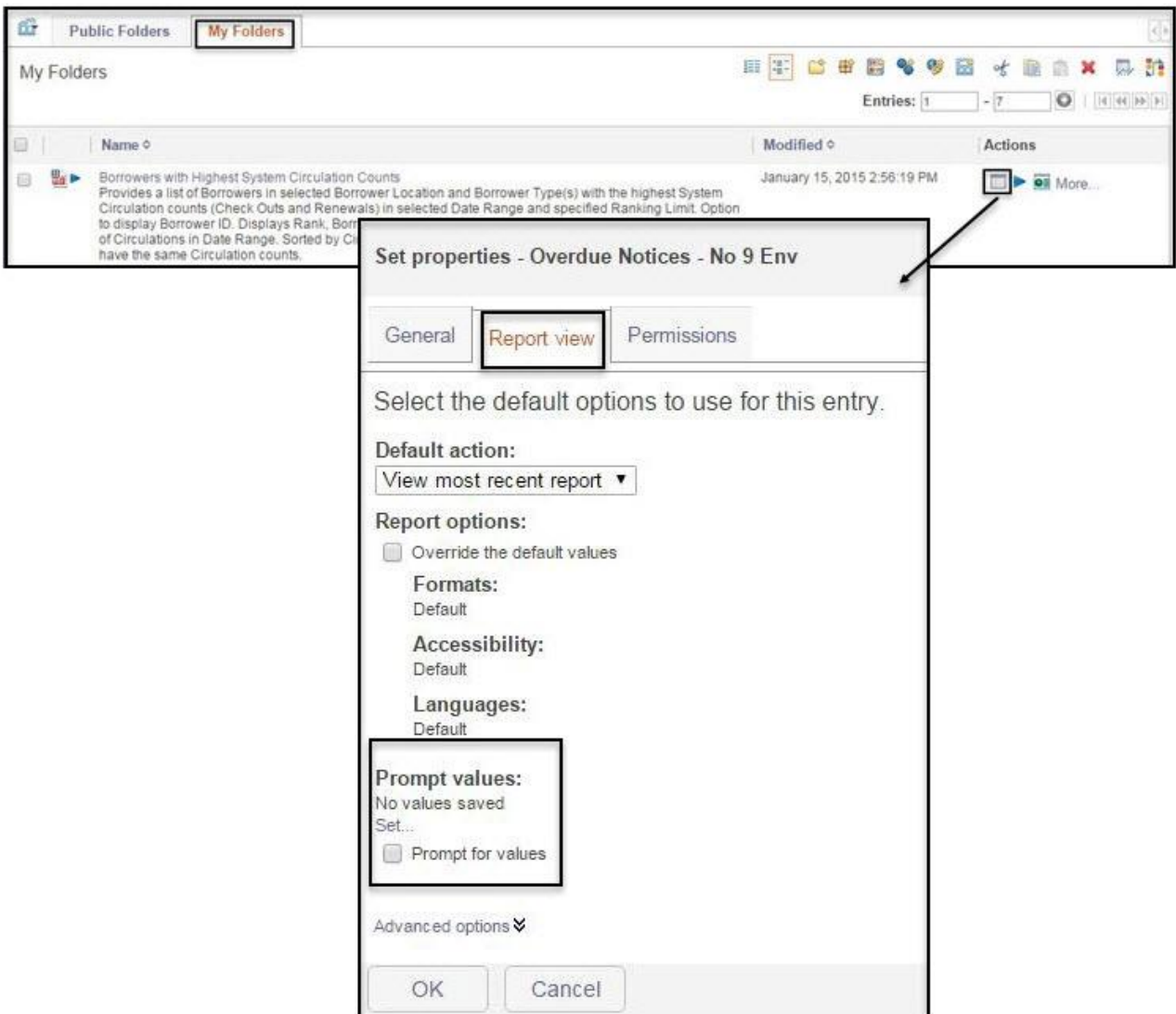
- Modify the Report Output

### Getting Started

First, make sure you are modifying output on a report view in **My Folders** for the report you want to change. Select the **Set Properties** icon  to open the Set properties page for the selected report. Select the **Report View** tab.

Under **Prompt values**, shown on the following page, click *Set...* to display available search parameters and set the parameters. Click *Finish*

- Select the *Prompt for values* check box if you want the report to pre-select parameters, but also want the ability to change values before the report runs.
- Clear the *Prompt for values* check box if you want to run with the selected parameters.



Click **OK** after you have made your modifications. You are returned to **My Folders**.