DelawareLibraries

Symphony WorkFlows

Instructions for Viewing a List Transit Report in Excel

Revision Date: 03/09/2021

List Transit Reports

The List Transit report will provide a list of transits either in route to your library, or items that have left your library to travel to another library; either to fill a hold or return to their home location. Both reports looking at transit to or from your library will use the transitlist source report. If library staff need assistance creating a transit report, please submit a ticket to helpdesk@lib.de.us.

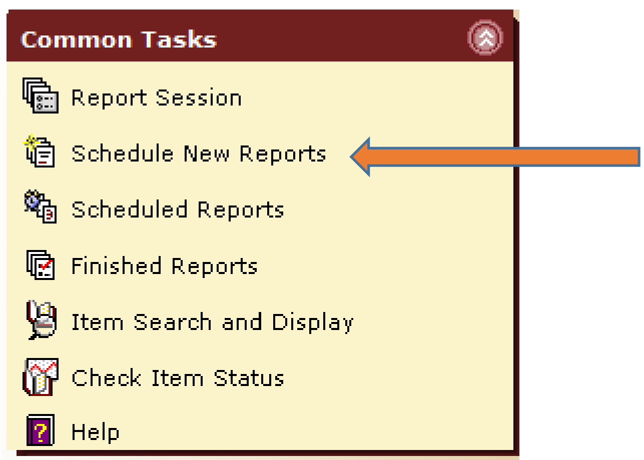
This topic can be viewed on the [Statewide Circulation meeting-Feb 8, 2021 video]() starting at the 22:52 minute mark.

*Important Note! Not all reports in WorkFlows have the ability to use a Style Sheet. For example, the List Items report does not have a Style Sheet option. If the report does not have a Style Sheet tab, there will not be an option to select an .xsl style sheet.

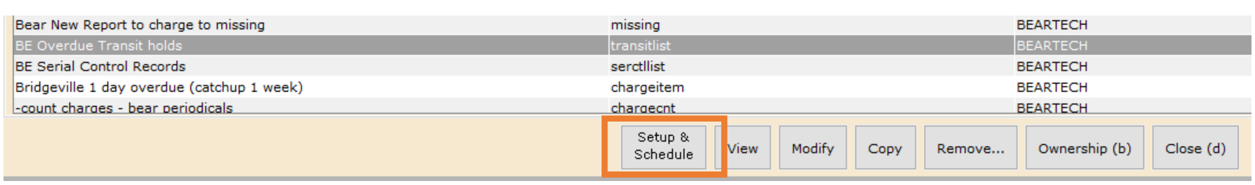
Running the Report Using a Style Sheet

*Important note! The instructions in this section are based off the assumption that a list transit report has already been created. The below steps outline how to view an already created list transit report in Excel. If your library needs assistance creating a list transit report, please email the helpdesk (helpdesk@lib.de.us).

Select Reports → Schedule New Reports

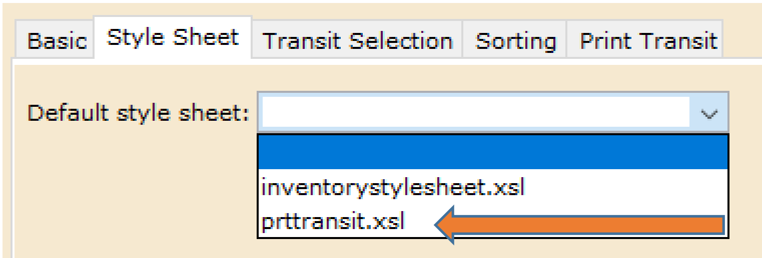


Select the report name, and click the Setup & Schedule button



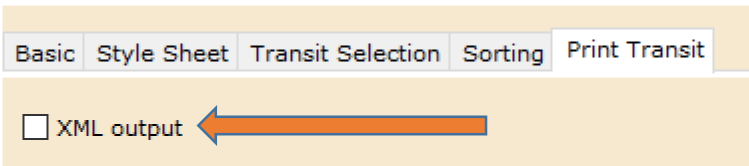
Select the Style Sheet tab.

Use the drop down arrow in the Default style sheet box and select prttransit.xsl



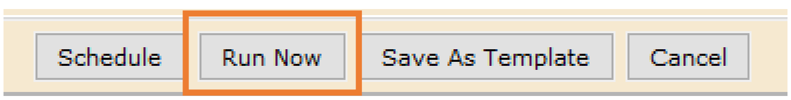
Select the Print Transit tab.

Place a checkmark in the XML output box.



The other report tabs, such as Transit Selection and Sorting, should already be configured with individual library information. Check this BEFORE running the report. If you need assistance creating a list transit report, please submit a ticket to the helpdesk (helpdesk@lib.de.us).

Click the Run Now button.

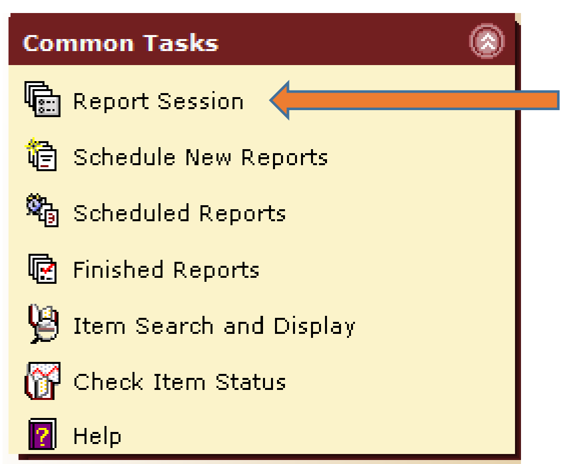


Click Close.

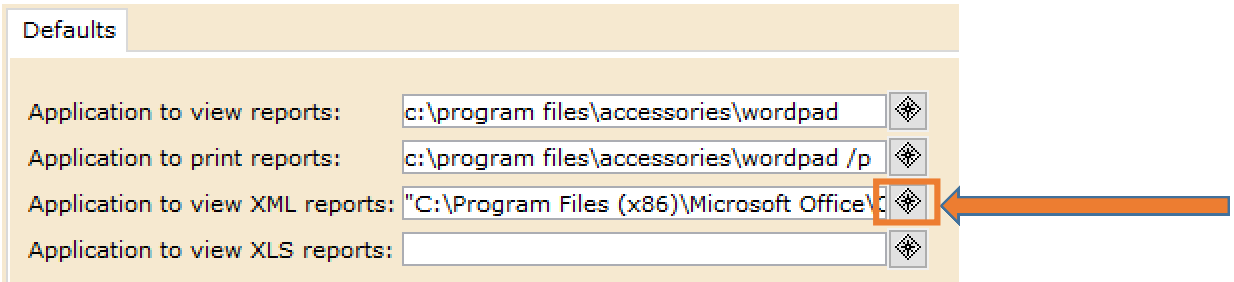
Report Session Settings

In order to view the report in Excel, WorkFlows must be told what application to use, and the path to that application.

Select Reports → Report Session



Under the Defaults tab, the Application to view XML reports must point to Microsoft Excel.



Staff will need to verify locally the correct path to the Excel application on each workstation. Use the gadget box to browse and select the Excel application. In general, the application path will be:

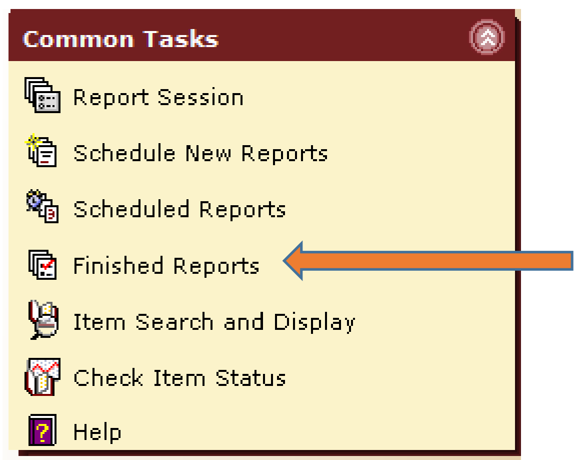
"C:\Program Files (x86)\Microsoft Office\Office16\EXCEL.EXE"

*The " " are needed on the file path if there are spaces.

Click OK.

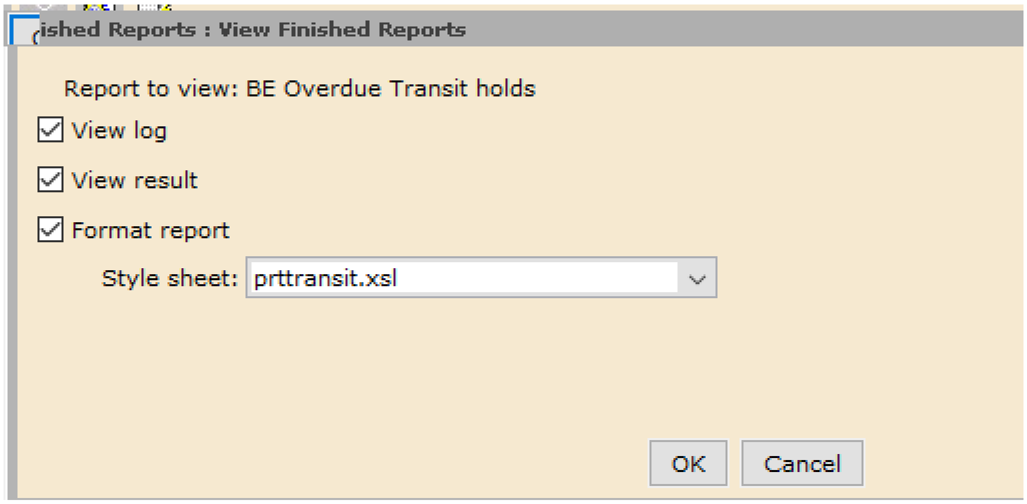
Viewing a Report

Select Reports → Finished Reports



Select report and click View.

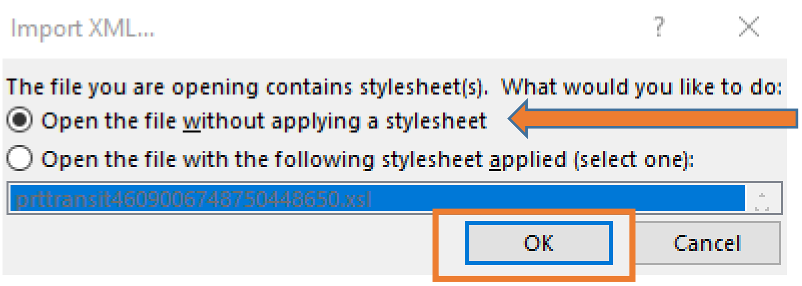
A window will pop up asking what you want to view. The options are to view the log, view the results, or format the report. Since a style sheet was selected when the report was run, it will need to be selected when the report is viewed.

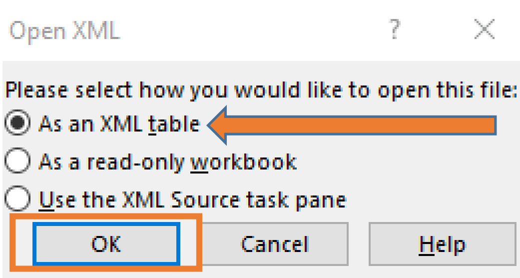


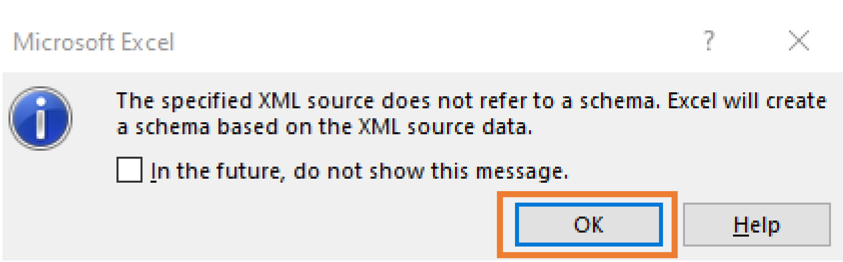
Click OK.

The log report will open in Notepad.

The formatted report will open in Excel. Several prompts will appear in Excel. Select OK through all of them.



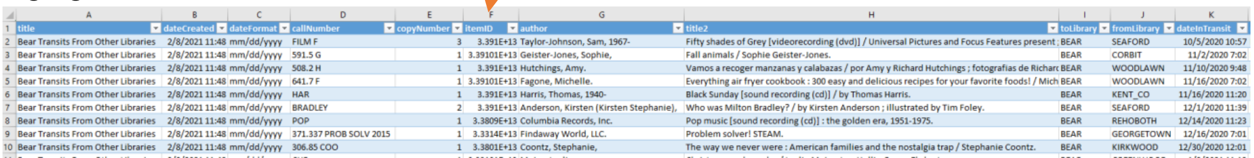




The report will open in Excel.

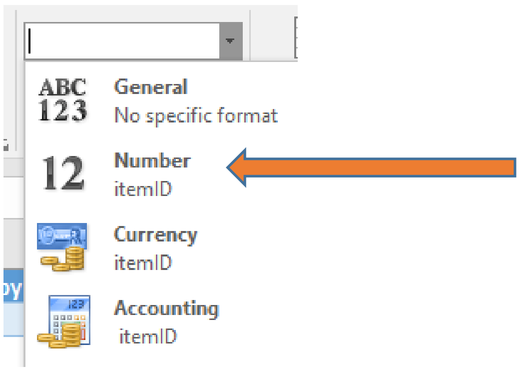
The ItemID column will need to be modified to correctly show the entire barcode number.

Highlight the Item ID column

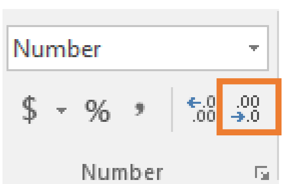


	A	B	C	D	E	F	G	H	I	J	K
1	title	dateCreated	dateFormat	callNumber	copyNumber	itemID	author	title2	toLibrary	fromLibrary	dateInTransit
2	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	FILM F	3	3.391E+13	Taylor-Johnson, Sam, 1967-	Fifty shades of Grey [videorecording (dvd)] / Universal Pictures and Focus Features present ;	BEAR	SEAFORD	10/5/2020 10:57
3	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	591.5 G	1	3.39101E+13	Geister-Jones, Sophie,	Fall animals / Sophie Geister-Jones.	BEAR	CORBIT	11/2/2020 7:02
4	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	508.2 H	1	3.391E+13	Hutchings, Amy.	Vamos a recoger manzanas y calabazas / por Amy y Richard Hutchings ; fotografias de Richarc	BEAR	WOODLAWN	11/10/2020 9:48
5	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	641.7 F	1	3.39101E+13	Fagone, Michelle.	Everything air fryer cookbook : 300 easy and delicious recipes for your favorite foods! / Mich	BEAR	WOODLAWN	11/16/2020 7:02
6	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	HAR	1	3.391E+13	Harris, Thomas, 1940-	Black Sunday [sound recording (cd)] / by Thomas Harris.	BEAR	KENT_CO	11/16/2020 11:20
7	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	BRADLEY	2	3.391E+13	Anderson, Kirsten (Kirsten Stephanie),	Who was Milton Bradley? / by Kirsten Anderson ; illustrated by Tim Foley.	BEAR	SEAFORD	12/1/2020 11:39
8	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	POP	1	3.3809E+13	Columbia Records, Inc.	Pop music [sound recording (cd)] : the golden era, 1951-1975.	BEAR	REHOBOTH	12/14/2020 11:23
9	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	371.337 PROB SOLV 2015	1	3.3314E+13	Findaway World, LLC.	Problem solver! STEAM.	BEAR	GEORGETOWN	12/16/2020 7:01
10	Bear Transits From Other Libraries	2/8/2021 11:48	mm/dd/yyyy	306.85 COO	1	3.3801E+13	Coontz, Stephanie,	The way we never were : American families and the nostalgia trap / Stephanie Coontz.	BEAR	KIRKWOOD	12/30/2020 12:01

On the Home tab in Excel, under the Number section, select the down arrow next to the word General and select Number.



Select the Decrease Decimal point to eliminate the .00. You will need to click this feature twice to remove both ending 0's.

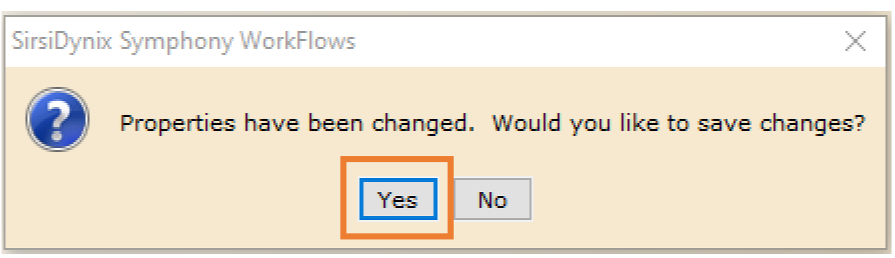


The ItemID column should now show the barcode numbers correctly.

itemID
33910049232607
33910053294600
33910042959776
33910052129146
33910035130443
33910049283931
33809001423412
33314000051041
33801001433129
33910053443389
33329910012503
33810005507375
33910044669704
33910041845216
33910049064323
33807020214564

Saving the Settings

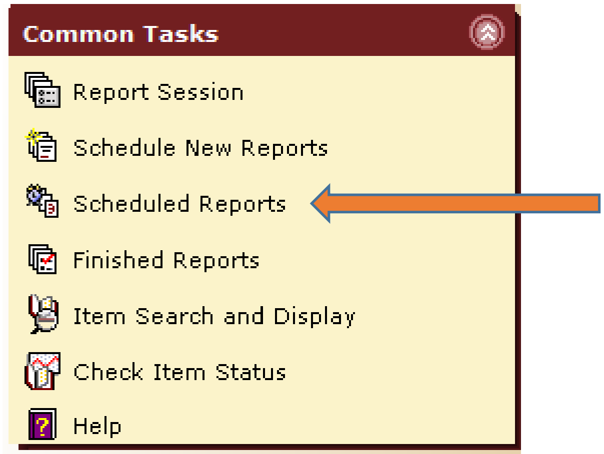
This step is only needed if the Report Session settings were modified. Upon closing WorkFlows, a window will pop alerting the user that Properties have been changed. Would you like to save changes? Select Yes. This will ensure that the Report Session settings will remain when WorkFlows is opened again.



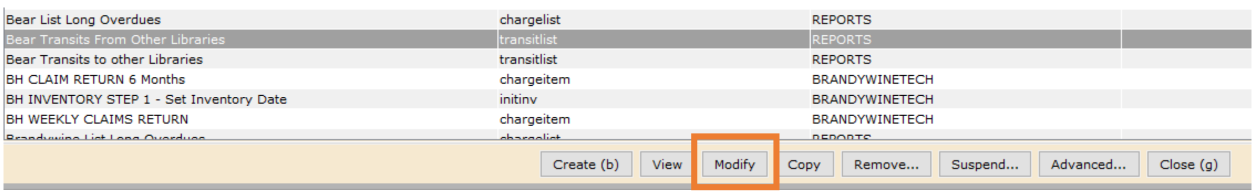
Modifying a Scheduled Report

If the transit report was already created and is scheduled to run on a regular basis, staff will want to modify the Scheduled report.

Select Reports → Scheduled Reports

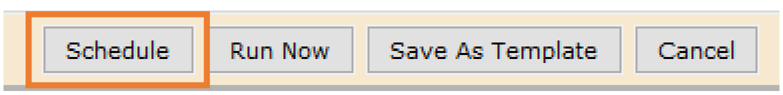


Select the report and click Modify.

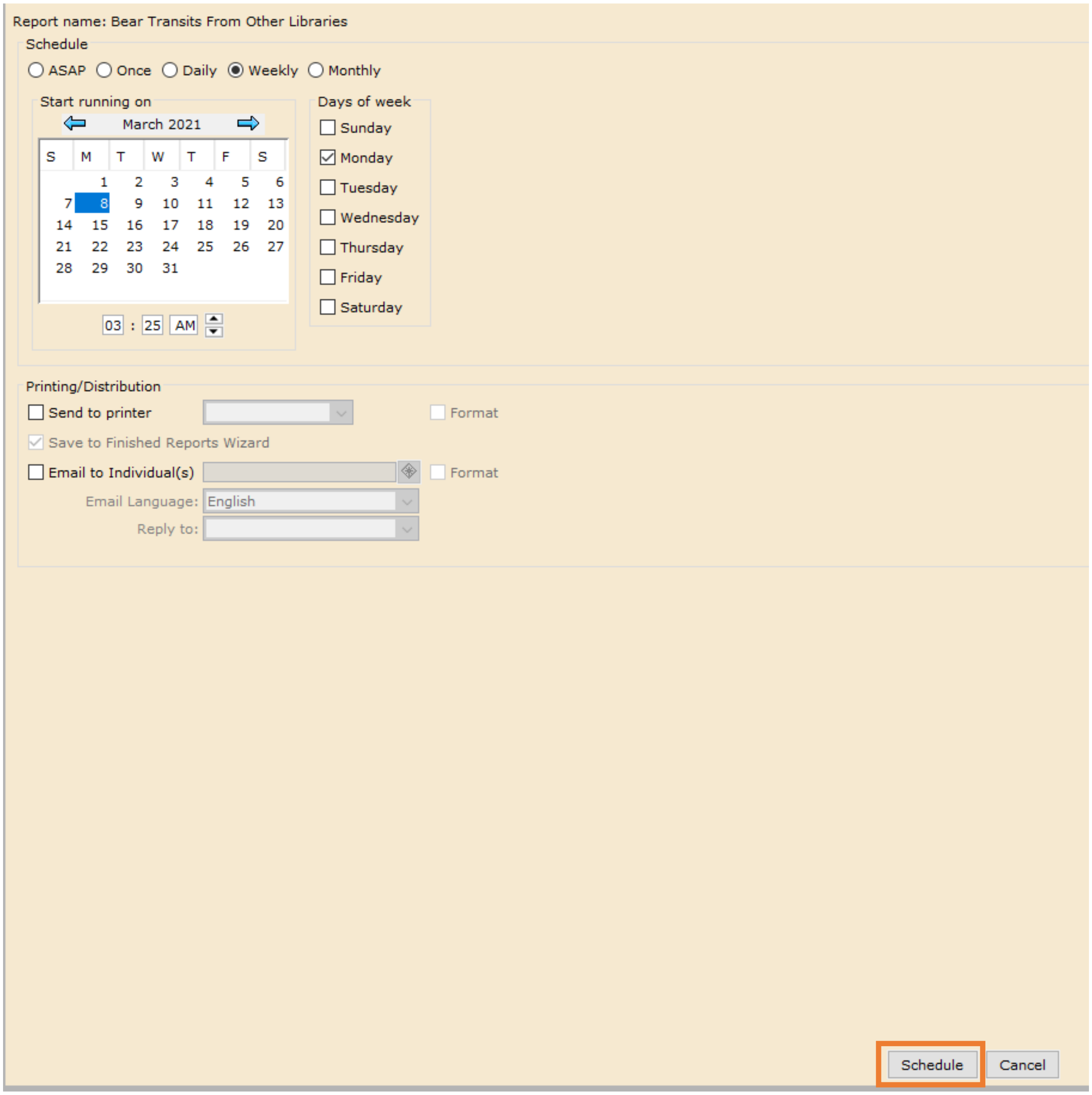


Complete the same steps as covered in the "Running the Report Using a Style Sheet" section.

Once changes are made, instead of clicking Run Now, select Schedule.



The schedule window will open. This window will show the date, time and frequency the report is scheduled to run. Staff should not modify any of these settings to keep the report running on the same schedule. Simply click the Schedule button, and the modified report will replace the original report.


Report name: Bear Transits From Other Libraries
Schedule
ASAP
Once
Daily
Weekly
Monthly
Start running on
March 2021
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31
03 : 25 AM
Days of week
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Printing/Distribution
Send to printer
Format
Save to Finished Reports Wizard
Email to Individual(s)
Format
Email Language:
English
Reply to:
Schedule
Cancel