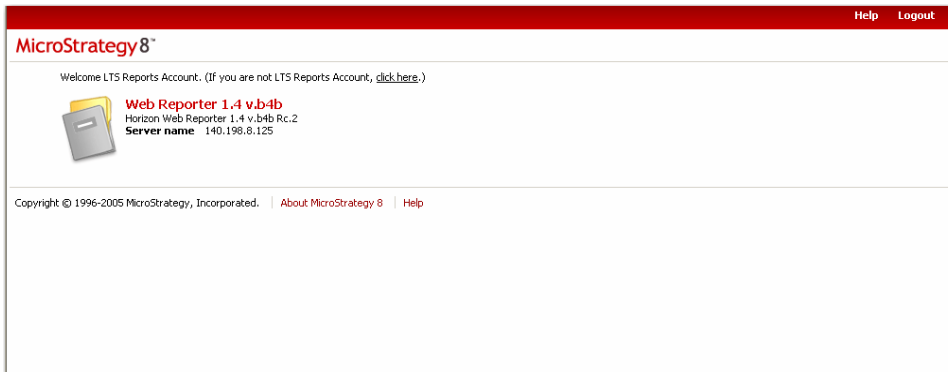


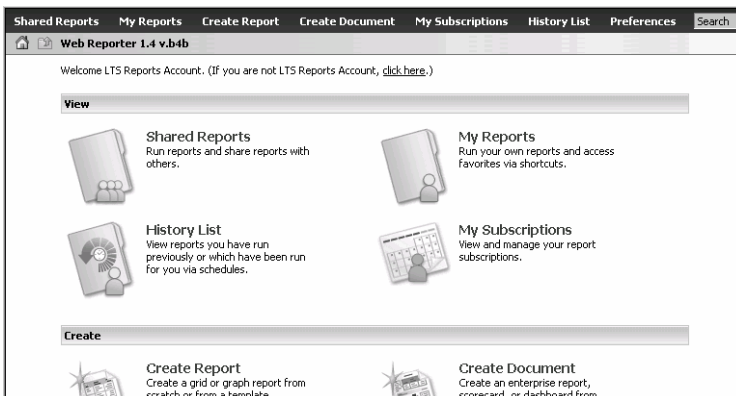
Web Reporter

Web Reporter runs against the Horizon library database and includes existing, shared reports that you can view, modify, and print.

- Log on to Web Reporter at <http://140.198.8.125/HorizonWebReporter/asp/Main.aspx>
- Enter Username and Password
(Contact LTS for username and password if needed)
- Click Web Reporter 1.4 v.b4b



- At the Web Reporter window, click on a folder to select it.



Shared Reports – Holds the existing, predesigned reports that are shared by all users

My Reports – Holds reports that you have created or edited

Note: Web Reporter accounts are generic accounts assigned by college and used by more than one person per college. The My Reports folder is shared by anyone logging into the account.

History List – Holds previously run reports. Users can put reports in the History List to save the prompt choices as well as any edits.

Preferences – Holds general preferences for the account including font, default home page, print defaults, etc.

Note: Web Reporter accounts are generic accounts assigned by college and used by more than one person per college. Preferences are shared by anyone logging into the account.

Create Report, My Subscriptions - Advanced features

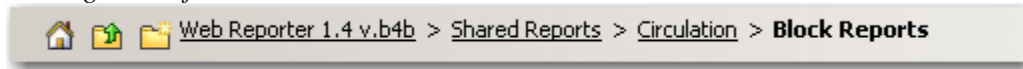
- To log out, click Logout at the far right of the menu bar.



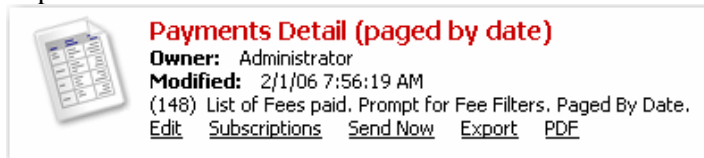
Shared Reports

Shared Reports are either Reports or Documents. Reports are requests for specific, formatted data and usually include filter prompts. Documents format data from multiple reports into a single document.

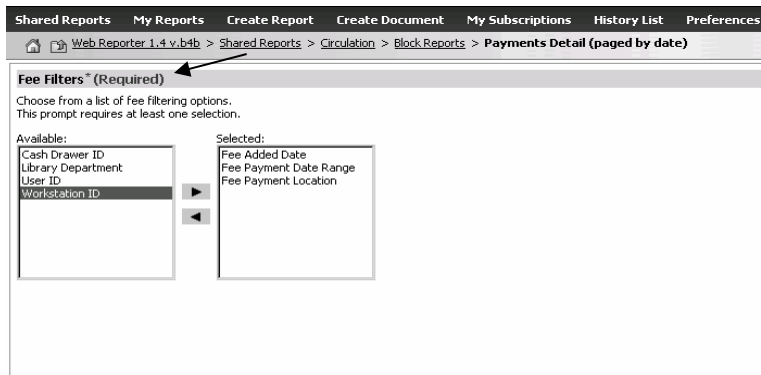
- Click the Shared Reports folder to access the existing reports. Click the appropriate sub-folder(s). *The folder path is indicated at the top of the screen. You can return to any folder in the path by clicking on the folder name.*



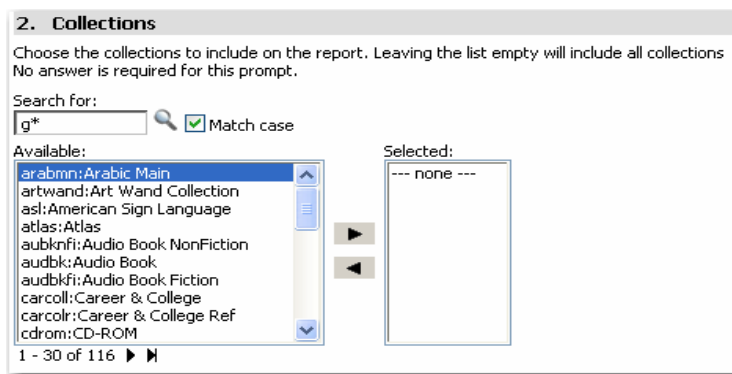
- Click a report title to open the report. You also have links to open directly into Edit mode, to Export, or print to PDF.



- The Filter page opens (if the report includes no filters, the report opens). Follow the prompts to select the criteria to include on the report. Note that some filters are required and some are optional.




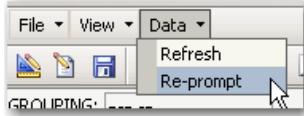
- Use the **Add to** and **Remove from** arrows or double-click your choices to make selections for the filters. You can usually choose more than one.
- If there are multiple screens of available choices (i.e. Collection search), you can search for the correct option. The asterisk * is used as a wildcard.



- When you finish defining the report, click

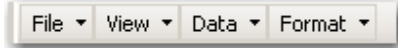



- To change the filter choices (i.e. select a different collection), click  or select Data/Re-prompt from the report menu bar.

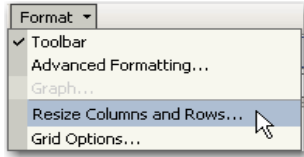


Editing Reports

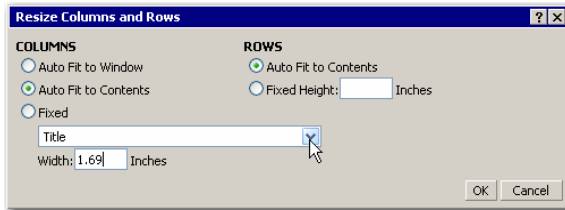
- There are edit menu options available for editing the existing report.



- Change the size of columns and rows by clicking and dragging them at the double-arrow prompt  -OR- under Format/Resize Columns and Rows.



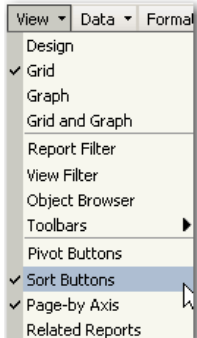
- At the resize screen, select the column(s) to resize from the drop-down list and enter a fixed width size or select AutoFit.



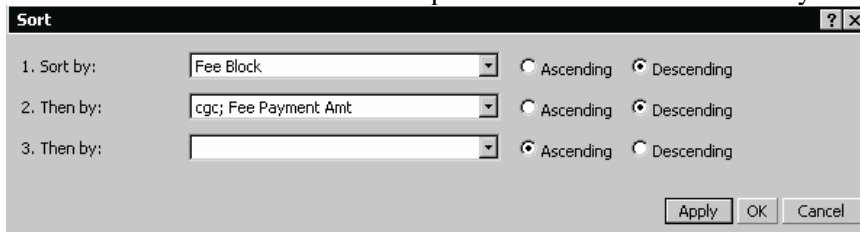
- Change the order of the columns by clicking and dragging them to the desired location.
- To sort, click the up or down (ascending or descending) arrow by a column heading to sort by that column.

Fee Payment Date/Time △	Library Department △	Cash Drawer ID △	Workstation △	Fee Borrower ID △	Fee Block ▾	Fee Payment Number △	Check Payment Number △
5/20/2004 11:36:00 AM	cgcc	2	1	1474	fine	adjcr	
5/20/2004 11:37:00 AM	cgcc	2	1	1474	fine	adjcr	
5/20/2004 11:38:00 AM	cgcc	2	1	1474	fine	adjcr	
5/20/2004 11:39:00 AM	cgcc	2	1	1474	fine	adjcr	
5/20/2004 11:40:00 AM	cgcc	2	1	1474	fine	adjcr	
Total for Fee Payment ID							
Total							

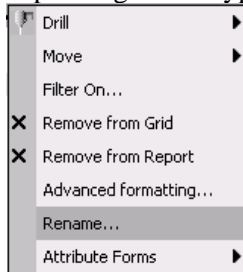
If the up/down arrows are not displayed, select View/Sort Buttons from the report menu bar.



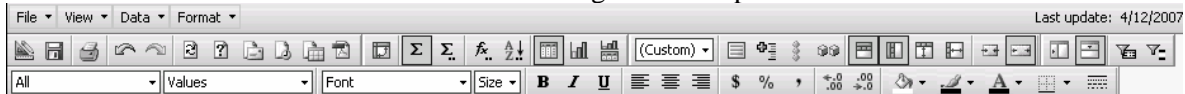
- Use the toolbar Sort button  to open the Sort window and sort by more than one column.



- To remove columns from a report, right-click on the column to display an options list. The list varies depending on the type of column.

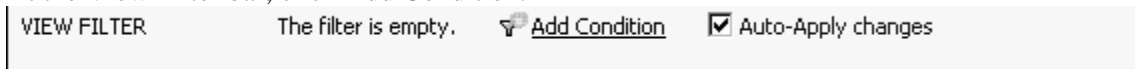


- Use additional toolbar buttons to make other changes to the report.

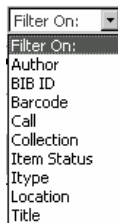


- To add a filter to an existing column on the report, click the View Filter button  on the toolbar.

- At the View Filter bar, click Add Condition.






- Select the field to Filter On.



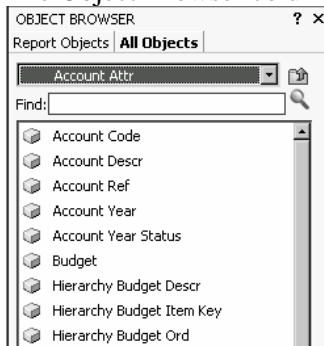
- Select to Qualify the filter or Select from a list of values. If qualifying, enter the qualifying information.



- Click the Apply button  to apply the filter and click the Run Report  button.

- To make additions or other changes to an existing report, click the Design button  or select View/Design on the report menu bar to switch to Design view.

- The Object Browser column displays the Report Objects. To add columns/fields, click All Objects.



- All Objects displays all folders and objects that you can access. To add additional objects to the report, find the desired object and double-click it or drag it to where you want the column on the report.


The table setup in the database determines what attributes can be added to any report and from which folder to select the attribute. If you get an error message, just click Continue and try again.

Error in report results





Your request could not be processed. Please try again. If the problem persists, contact the Administrator.

(QueryEngine encountered error: The report contains a cross join in a select pass between tables rv_fee_payment_detail and rv_circ_item. Execution is aborted per the cartesian join setting. Error in Process method of Component: QueryEngineServer, Project Web Reporter 1.4 v.b4b, Job 9011, Error Code= -2147212544.)

Continue

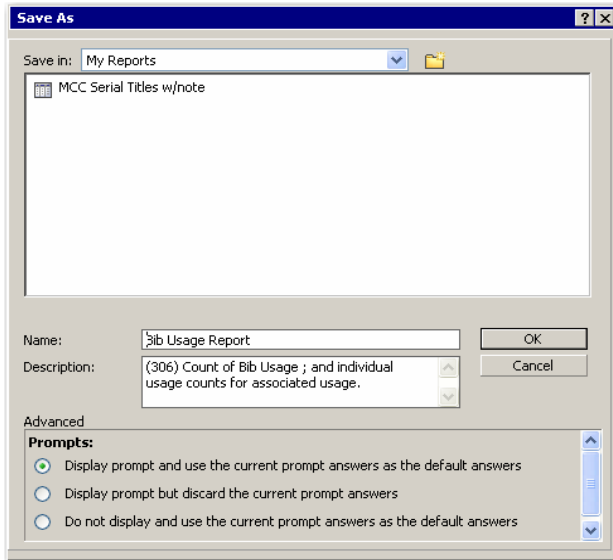
- To add a new column and add a filter to it, click the Edit Report Filter button .
- Under All Objects/Attributes, select the desired attribute and double-click to add it to the Report Filter.
- Select to Qualify the filter or Select from a list of values. If qualifying, enter the qualifying information.



- Click the Apply button  to apply the filter and click the Run Report  button.
- Returning to the report depends upon the type of report. Click  to see the report with your changes or click the Document button .

Saving Reports

- Click the Save button or select File/Save from the menu bar. 'Save in' defaults to the *My Reports* folder. Always save to the My Reports folder so as not to permanently alter the default Shared Reports.



- After saving, the Document Saved window opens. Be sure to select you plan to make further edits to the report.

Run newly saved document


if

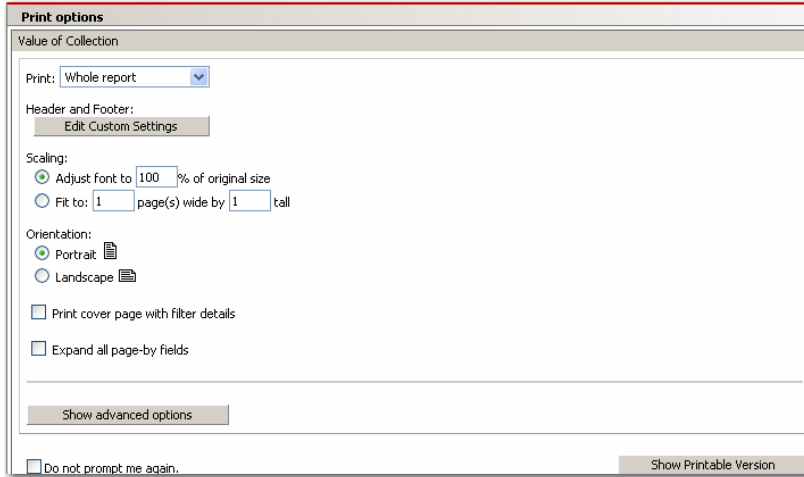


- The Report, with edits and filters, will be available in the My Reports folder.

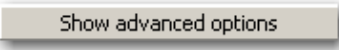

Printing and Exporting

To Print a report:


- Click the Print button  or select File/Print from the menu bar.

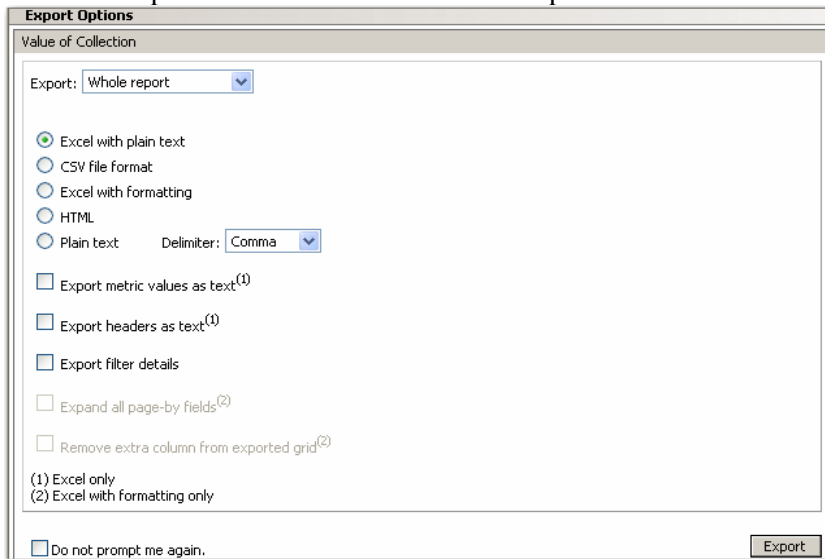


The 'Print options' dialog box is titled 'Print options' and has a 'Value of Collection' header. It contains several sections: 'Print:' with a dropdown menu set to 'Whole report'; 'Header and Footer:' with an 'Edit Custom Settings' button; 'Scaling:' with radio buttons for 'Adjust font to 100 % of original size' (selected) and 'Fit to: 1 page(s) wide by 1 tall'; 'Orientation:' with radio buttons for 'Portrait' (selected) and 'Landscape'; and two checkboxes: 'Print cover page with filter details' and 'Expand all page-by fields'. At the bottom, there is a 'Show advanced options' button, a 'Do not prompt me again.' checkbox, and a 'Show Printable Version' button.

- At the Print Options screen, select if printing a portion or the whole report, the orientation, or add/edit header and footer.
- Click the Show Advanced Options button  to change margins or paper size.
- Click the Show Printable Version button  to see a Print Preview of the report.
- Click the Print button or File/Print from the menu bar.

To Export a report to Excel or a text file:

- Click the Export button  or select File/Export from the menu bar.



The 'Export Options' dialog box is titled 'Export Options' and has a 'Value of Collection' header. It contains several sections: 'Export:' with a dropdown menu set to 'Whole report'; radio buttons for 'Excel with plain text' (selected), 'CSV file format', 'Excel with formatting', 'HTML', and 'Plain text' (with a 'Delimiter:' dropdown set to 'Comma'); and checkboxes: 'Export metric values as text⁽¹⁾', 'Export headers as text⁽¹⁾', 'Export filter details', 'Expand all page-by fields⁽²⁾', and 'Remove extra column from exported grid⁽²⁾'. At the bottom, there is a 'Do not prompt me again.' checkbox and an 'Export' button. Footnotes at the bottom left state: '(1) Excel only' and '(2) Excel with formatting only'.

- At the Export Options screen, select the format and if exporting a portion or the whole report. Click Export.
- At the File Download prompt, save the file.

Terminology

Attribute – data values that are displayed in forms (usually columns in the database)

Facts – columns in the database that contain numeric data to be calculated (prices, fines, etc.)

Filters – specify criteria or limits on data for reports

Metrics – columns that have had calculations done on them (%, etc.)

Objects – anything in the database: data, columns, reports, metrics/calculations, etc.

Prompts – prompts for information when a report is run

Resources

Web Reporter Login

<http://140.198.8.125/HorizonWebReporter/asp/Main.aspx>

SirsiDynix Customer Support

<http://customer.dynix.com/users/logon.asp>

Horizon Web Reporter Training Videos

<http://customer.dynix.com/training/review/4.asp>

(these videos are for an older version of Web Reporter, but a good introduction and overview)

Horizon Web Reporter Documentation

http://customer.dynix.com/support/hsc/tech/webreporter/manuals/product_manuals.html

(for an older version, but still usable)