



## **Running Jobs and Printing Notices and Reports Using Reporter**

Hi and welcome to this lesson on Running Jobs  
and Printing Notices and Reports  
Using Reporter in Voyager.

## Agenda

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- Workflow for generating report/notice file
- Analyzing the output
- System Administration settings
- Reporter settings / processing



- In this lesson, we will go through the Workflow for generating reports and notices files,
- Analyze the output  
and then look into the
- System Administration settings  
and
- Reporter settings/processing



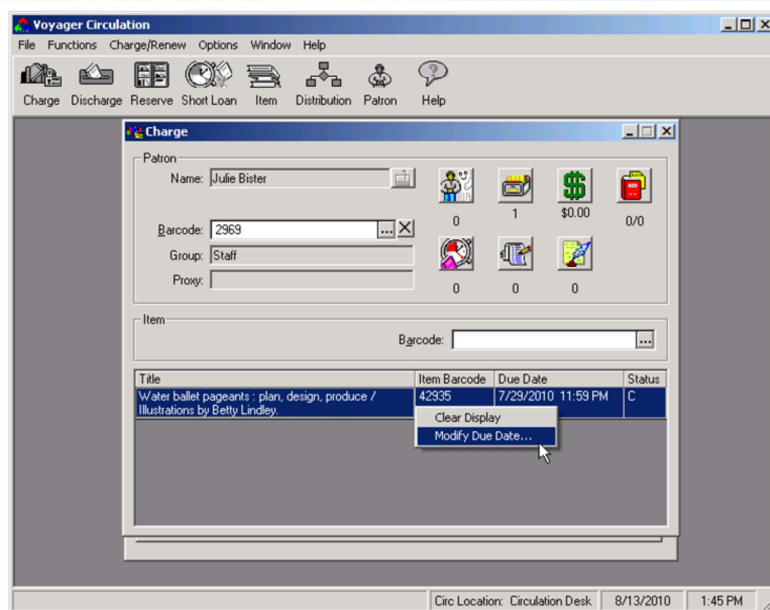
## **Workflow for File Generation**



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Let's begin with the **Workflow for File Generation**

## Workflow for File Generation



To start from the very beginning, let's make a book overdue, so it will generate an Overdue notice when we run our circjobs.

<annotate> Just right-click to modify the due date to be in the past.

<click>

Note the Circ Happening Location you logged into to conduct the transaction:

<annotate> it's displayed at the bottom of the Circ window. This will be important in determining which print location is generated for the .inp file.

Now let's run the circjob!

## Workflow for File Generation

/m1/voyager/yyyymmdd/sun

Pcircjob

```
Initializing...
1 -- Update Shelving Status
2 -- Overdue Notices
3 -- Recall Notices
4 -- Fine Fee Notices (new fines/fees only)
5 -- Hold Recall Available Notices
6 -- Hold Recall Cancelled Notices
7 -- Hold Recall (Due) Notices
8 -- Recall and Expire Call Slip Requests
12 -- All Daily Jobs (1 - 8)
14 -- Fine Fee General Statements (all patrons with an outstanding balance)
19 -- Hold Shelf Expired Report (date range required)
20 -- Reserved Items Active Report (date range required)
21 -- Reserved Items Expired Report (date range required)
22 -- Missing in Transit Report
23 -- Transaction Statistics Report (date range required)
24 -- Transaction Exceptions Report
25 -- Global Transaction Statistics Report (date range required)
26 -- Export OPAC Requests
27 -- Archive Short Loans
28 -- Automatic Orders For Distribution Items
29 -- Purge UB Patron Stub Records
30 -- Accrued Fines/Demerits
31 -- Apply Suspensions
32 -- UB Request Promotion
33 -- Update Remote Circulation Cluster Cache
34 -- Place Items on Active Course Reserve List
35 -- Place Recalls and Holds for Items on Active Course Reserve List
36 -- Take Items on Inactive Course Reserve Lists Off Reserve
37 -- Forgive Patron Demerits
38 -- Retain Patron IDs (the number of patron IDs to retain required)
39 -- Patron Purge
40 -- Forgive Fines/Fees by Patron ID (Patron ID file required)
41 -- Forgive Fines/Fees by Date (date range required)
42 -- Forgive Fines/Fees by Patron Group and Expiration Date
43 -- Synchronize Patron Counters for Universal Borrowing
; 99 -- Quit
```

Go to the location displayed here on the screen, and type:  
<click> Pcircjob

<click> you'll get a list of all the jobs.

## Workflow for File Generation

```
Process Job #?          12
All Daily Jobs...
Update Shelving Status...
...COMPLETED

Overdue Notices...
#####...COMPLETED

Recall Notices...
...COMPLETED

Fine Fee Notices...
...COMPLETED

Hold Recall Available Notices...
...COMPLETED

Request Expired/Cancelled Notices...
...COMPLETED

Courtesy Notices...
...COMPLETED

Archive and Expire Call Slip Requests...
...COMPLETED

All Daily Jobs... COMPLETED
```

Type in the number of the job you want to run, and you'll see it in motion:

## Workflow for File Generation

```
Thu Sep 3 00:01:03 2009 Overdue Notices...
Thu Sep 3 00:01:05 2009 ...COMPLETED

Thu Sep 3 00:01:05 2009 Recall Notices...
Thu Sep 3 00:01:05 2009 ...COMPLETED

Thu Sep 3 00:01:05 2009 Fine Fee Notices...

Failure to retrieve patron name -- patron not found
Patron Barcode: (id: 11)
Location Code: CIRC (id: 12)

Patron Barcode: (id: 11)
Location Code: CIRC (id: 12)

Failure to retrieve patron name -- patron not found
Item Barcode: 25697 (id: 44015)
Patron Barcode: (id: 67)
Location Code: CIRC (id: 12)

Item Barcode: 25697 (id: 44015)
Patron Barcode: (id: 67)
Location Code: CIRC (id: 12)

Thu Sep 3 00:01:05 2009 ...COMPLETED
Thu Sep 3 00:01:05 2009 Hold Recall Available Notices...
Thu Sep 3 00:01:05 2009 ...COMPLETED

Thu Sep 3 00:01:05 2009 Request Expired/Cancelled Notices...
Thu Sep 3 00:01:05 2009 ...COMPLETED

Thu Sep 3 00:01:05 2009 Courtesy Notices...
Thu Sep 3 00:01:05 2009 ...COMPLETED

Thu Sep 3 00:01:05 2009 Archive and Expire Call Slip Requests...
Thu Sep 3 00:01:05 2009 ...COMPLETED

Thu Sep 3 00:01:05 2009 All Daily Jobs... COMPLETED
```

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You can also verify:

- whether a job ran,
- when, and what errors occurred during the run

by looking at the appropriate \*job.log in /m1/voyager/yyydb/rpt. So in this example, we'd look to the circjob.log:



## Analyzing the Output

Now we will move on to **Analyzing the Output**



## Analyzing the Output

.inp file (in: /m1/voyager/yyydb/rpt directory)

```
[VGER] voyager@supzv721 : rpt/ => more cronotes.Circ.inp
02197,2113381Bister1Julie11Ex Libris Group1Customer Support11350 E. Touhy Ave, Suite 200 East11Des Plaines1IL1600181USA1847 227-29
69108/13/20101Voyager Library Training Database1Circulation Desk11350 E. Touhy Ave1Suite 200 East11Des Plaines1IL16001811847-296-220
01Water ballet pageants : plan, design, produce / Illustrations by Betty Lindley,1Price, Ferne,1429351GV837 .P761107/29/201011111
00197,2113491Atkinson1Meredith11Ex Libris Group1Customer Support11350 E. Touhy Ave, Suite 200 East11Des Plaines1IL1600181USA1847 2
27-2651108/13/20101Voyager Library Training Database1Circulation Desk11350 E. Touhy Ave1Suite 200 East11Des Plaines1IL16001811847-29
6-22001Item1less1114551
```

Technical User's Guide >  
Circulation Notices Standard Interface Files:

Type 02: Overdue Notice = 38 fields.

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**The output of these jobs is written to an .inp file.**

Here's what the content of the file looks like:

<annotae and remove Oval>

**In order to understand the data in this .inp file, or to troubleshoot problems in running the file through Reporter,** take a look at the Technical User's Guide. For the following example, we'll look up the chapter on Circulation Notices Standard Interface Files.

**Note the number in the first segment of each entry in the .inp file – this corresponds to the type of notice/report this line of data is for.**

The type 02 which we see here is for Overdue Notices:

## Analyzing the Output

Table 26-1. Base segment for circulation notices

Table 26-1. Base segment for circulation notices

Item #	Required	Item Name	Length	Description
16		country	20	Patron's country.
17		phone	25	Patron's phone.
18	Y	date	10	Current date.
19	Y	institution	50	Institution name.
20		library	25	Library location name.
21		address line 1	50	Library's address line 1.
22		address line 2	40	Library's address line 2.
23		address line 3	40	Library's address line 3.
24		city	30	Library's city.
25		state/province	7	Library's state/province.
26		postal code	10	Library's postal code.
27		country	20	Library's country.
28		phone	25	Library's phone.
29		item title	255	Item title.
30		item author	255	Item author.
31		item id	25	Item barcode.
32		item call #	255	Item call number.
33		enum/chron	255	Enum/chron. This is the last common item and the <u>last item in the record</u> for circulation notices.

To figure out what each segment in each line refers to, look first at the base segment provided (there are a certain number of fields that are the same across notice types) – here's section one:

<click>

And here's section two:

<click>

## Analyzing the Output

### Overdue Notice Suffix (02)

[Table 26-4](#) describes the overdue notice suffix.

Table 26-4. Overdue Notice Suffix (02)

Item #	Required	Item Name	Length	Description
34	Y	due date	10	Due date.
35		sequence	2	Notice sequence number.
36		proxy patron last name	30	Proxy patron patron's last name.
37		proxy patron first name	20	Proxy patron patron's first name.
38		proxy patron title	20	Proxy patron's title. This is the <u>last item in the record</u> for overdue notices.

In addition to that base segment data, use the information for the suffix of the specific type of notice that is specified in that first segment (the 02 in this case):

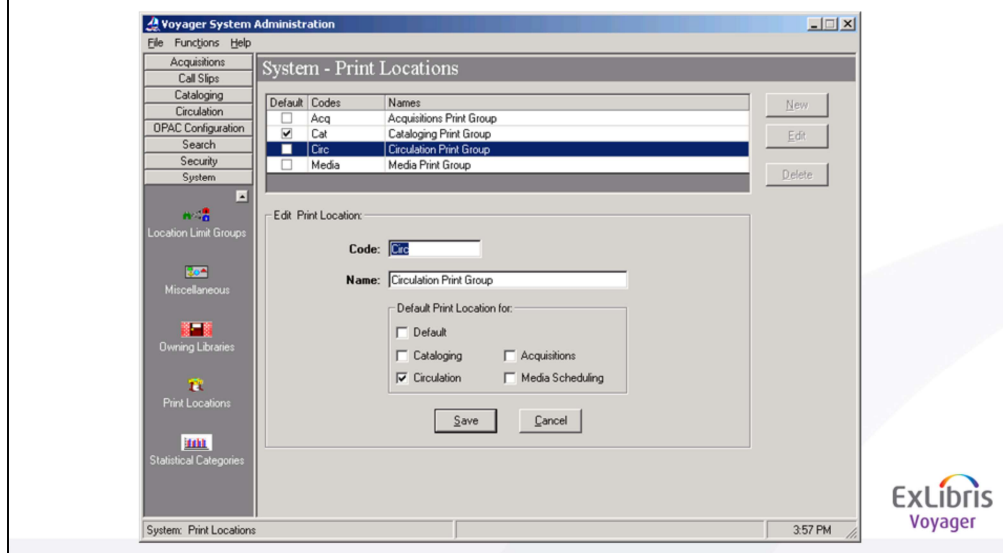
Using this SIF information, you can look at the .inp file and determine if a required segment is missing, a character limit is exceeded, etc., which could be the problem preventing processing through Reporter.

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## **System Administration Settings**

## System Administration Settings

crcnotes.**Circ**.inp



**When you're ready to process the .inp file through the Reporter client,** the first thing you have to do is take note of the print location code in the filename (crcnotes.**Circ**.inp).

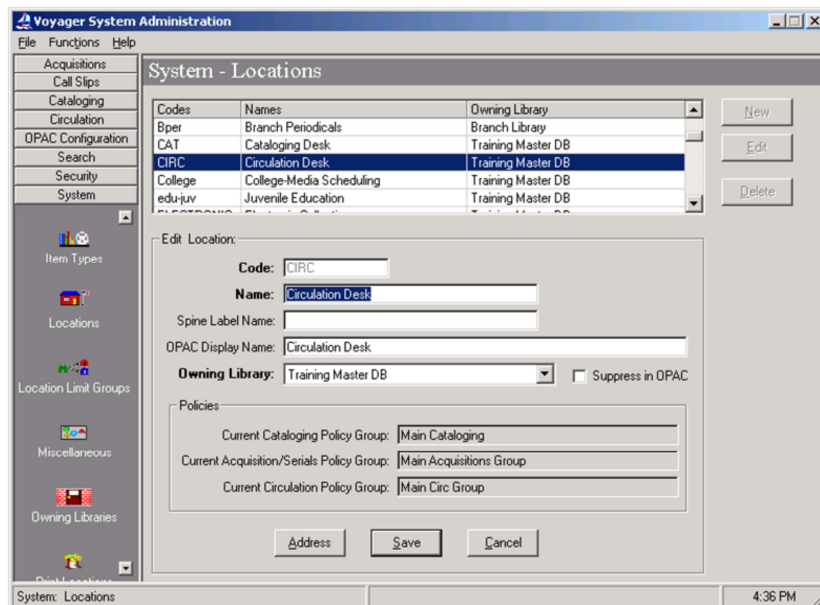
This code corresponds to a Print Location that is set up in SysAdmin:

The location name that you see here, linked to this print location code, is key to determining which file you'll attempt to print out in Reporter.

**The print location code given to the .inp file is dictated by the location where the transaction occurred, and what print location that transaction location is attached to in its policy definition.**

So, for this example,  
we saw in the initial charge transaction that  
the Circ Happening Location of this transaction is Circulation Desk.

## System Administration Settings



The screenshot shows the 'Voyager System Administration' window with the 'System - Locations' tab selected. The left sidebar contains a tree view with categories: Acquisitions, Call Slips, Cataloging, Circulation, OPAC Configuration, Search, Security, System, Item Types, Locations, Location Limit Groups, Miscellaneous, and Owning Libraries. The 'Locations' category is expanded, showing a list of locations. The 'Edit Location' dialog is open for the 'CIRC' location. The dialog fields are as follows:

Codes	Names	Owning Library
Bper	Branch Periodicals	Branch Library
CAT	Cataloging Desk	Training Master DB
CIRC	Circulation Desk	Training Master DB
College	College Media Scheduling	Training Master DB
edu-juv	Juvenile Education	Training Master DB

**Edit Location:**

Code: CIRC

Name: Circulation Desk

Spine Label Name:

OPAC Display Name: Circulation Desk

Owning Library: Training Master DB ☐ Suppress in OPAC

**Policies**

Current Cataloging Policy Group: Main Cataloging

Current Acquisition/Serials Policy Group: Main Acquisitions Group

Current Circulation Policy Group: Main Circ Group

Buttons: Address, Save, Cancel

System: Locations 4:36 PM

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If you go to SysAdmin>System>Locations, you'll see that <annotate> this location is attached to the Main Circ Group Circ Policy Definition.

## System Administration Settings

crcnotes.**Circ**.inp

The screenshot shows the 'Location Settings' dialog box with the 'Settings' tab selected. The 'Default Location' is set to 'Juvenile Education' and the 'Default Item Type' is 'book'. The 'Default Print Location' is 'Circulation Print Group'. The 'Automated Storage' checkbox is unchecked. Under the 'Circulation Location' section, which is checked, there are several options: 'Collect Fines' (checked), 'Due Date Slip Print' (unchecked), 'OPAC Suppress for Item on the Fly' (checked), 'Discharge Receipt Print' (unchecked), 'Courtesy Discharge' (checked), 'Hold Slip Print' (unchecked), 'Payment Receipt Print' (unchecked), 'Routing Slip Print' (unchecked), and 'Pick Up Location' (checked). The 'Shelving Interval' is set to 1 Day, 'In Transit Interval' is 2 Days, 'Hold Life' is 100 Days, and 'Recall Life' is 100 Days. The 'OK' and 'Cancel' buttons are at the bottom.

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In the Main Circ Group policy definition, if you go to Locations, select Circulation Desk, and click the Settings button, you'll see the Print Location with which this circ happening location is associated:

<annotate>

And that's the Print Location Name that corresponds to the code in the .inp file!

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## **Reporter Settings and Processing**



## Reporter Settings and Processing

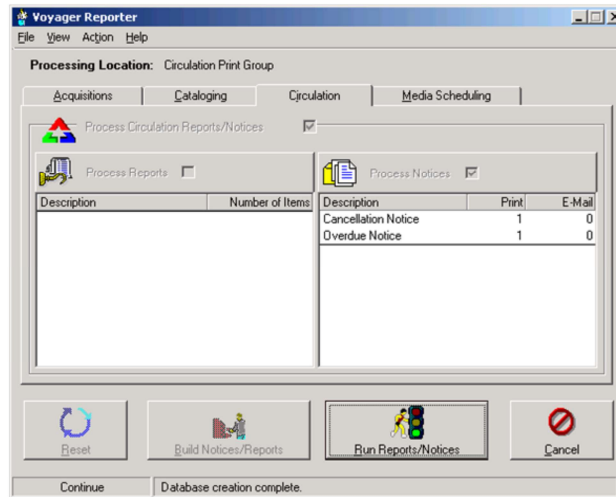
The screenshot shows the 'Preferences' dialog box with the 'Global' tab selected. The 'Save setup selections as Initialization defaults.' checkbox is checked. Under 'File Archive Options', the 'Always' radio button is selected. Under 'Forms Control', the 'All Notices/Reports print on same paper.' radio button is selected. The 'Processing Locations' dropdown menu is open, showing a list of print groups: 'Circulation Print Group', 'Acquisitions Print Group', 'Cataloging Print Group', 'Circulation Print Group' (highlighted), and 'Media Print Group'. The 'Data File Path' is set to 'C:\voy20050\reporter\'. The 'OK' and 'Cancel' buttons are at the bottom.

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When you log into the Reporter client and go to File>Preferences, you'll see a field where you select a Processing Location – the choices in this dropdown are populated by the names of the Print Locations you've established in SysAdmin>System.

In order for us to print out the crcnote.Circ.inp file, we'll need to select the Processing Location that corresponds to that "Circ" print location code – which, according to System>Print Location in SA, is Circulation Print Group.

## Reporter Settings and Processing



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Now we go to the Circulation tab, make sure the file type of Notices is checked off, and click Build:

You see the two entries in our .inp file are both set to print (00 is the cancellation notice, 02 is the overdue notice). At this point, you can choose to Cancel and not print these notices, or continue on by clicking Run.

## Reporter Settings and Processing

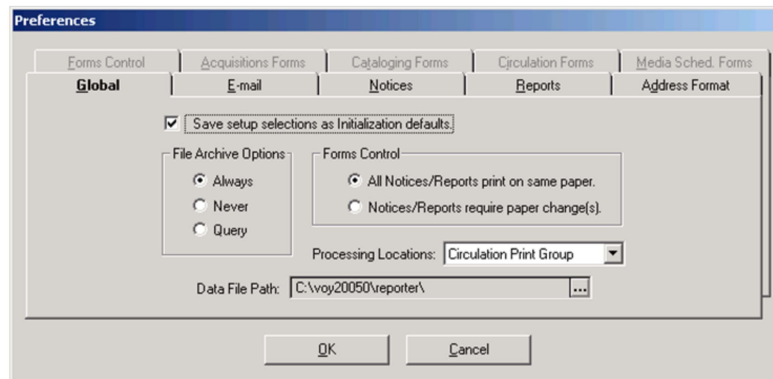
crcnotes.**Circ**.inp

crcnotes.**Circ**.20100813.1559

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In either case, the C R C notes.Circ INP file on the server will now have the time/date stamp of when you ran the file through Reporter, instead of the INP extension (crcnotes.Circ.20100813.1559). Should you need to re-run the file, you can simply rename the file to have the INP extension again instead of the time/date stamp.

## Reporter Settings and Processing

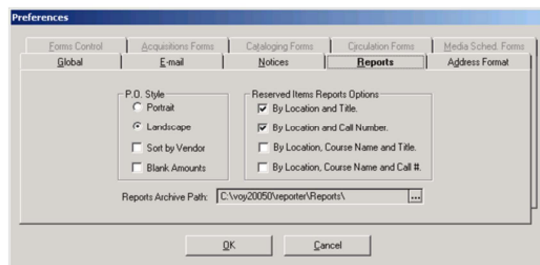
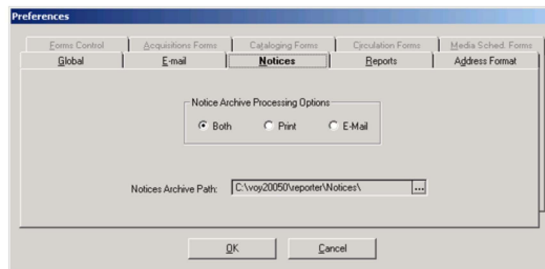


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Your other option for reprinting reports/notices you've already run is Archiving – this is set up in Reporter>Preferences as well:

<annotate>

## Reporter Settings and Processing



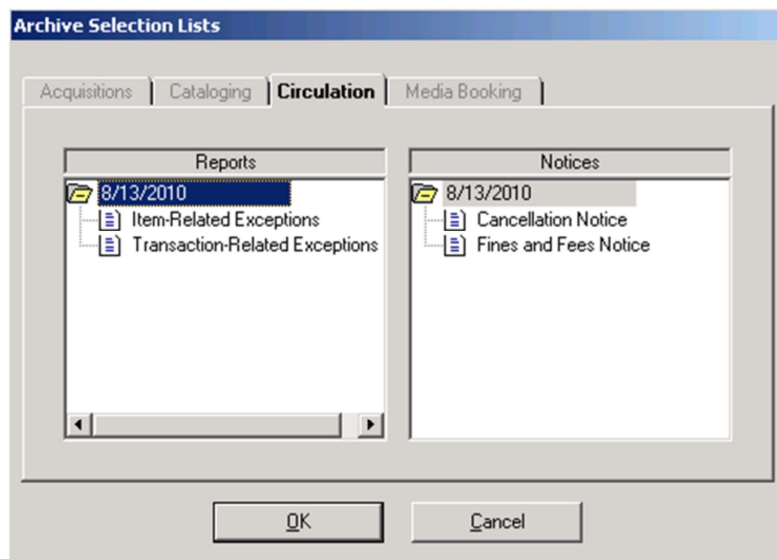
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If you've set the preferences to archive on the PC you're using to print from Reporter, you set up a path to the folder for the archive files to write to:

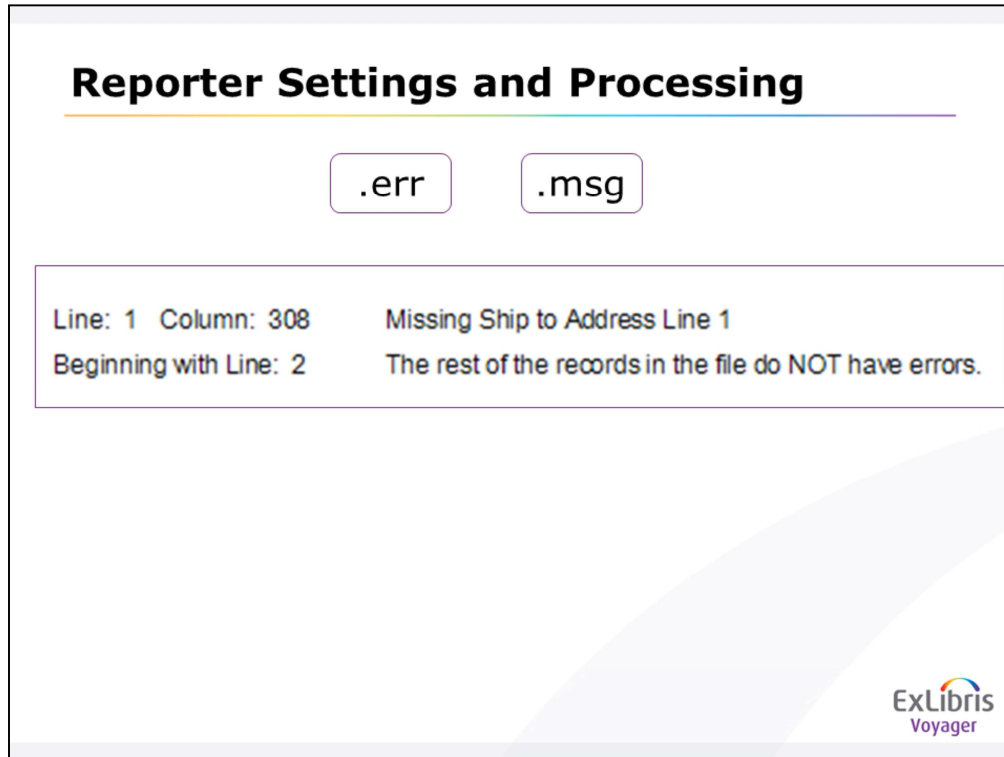
<annotate>

<annotate>

## Reporter Settings and Processing



If you've archived a run, you can then go to File>Archives and select any of these notices to run through Reporter again.



The archive files aren't the only thing that writes to these folders – if you encountered an error during processing in the Reporter client, an .err file and a .msg file will also be created. Open up the .msg file, and you'll see a message alerting you to what the problem was – for example:

<click>

You can then either correct the problem in the file itself, or, to prevent this from occurring again, figure out which piece of data is problematic (or in this case non-existent) in the database and fix the problem for good!

## Summary

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- Workflow for generating report/notice file
- Analyzing the output
- System Administration settings
- Reporter settings / processing



# Thank You!

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