

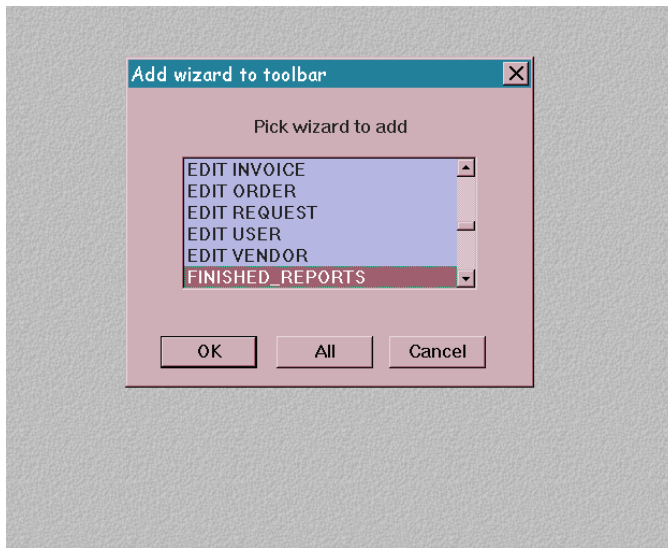
## Directions to Print from WorkFlows:

### I. Getting Started: Adding the Finished Report Wizard to your toolbar

Note: When working with reports you want to use the same WorkFlows login that you used to view and print the old-style (blue screen) reports. Not all logins can see all reports for security reasons!!!

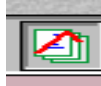
Printing in WorkFlows takes you into the Windows application WordPad. Make sure you DO NOT already have a copy of WordPad running in the background!!!

- 1) Right-click on the gray space on your toolbar where you want to add the Finished Report wizard.
- 2) Choose: **Add Button** from the menu.
- 3) The Add wizard to toolbar window will appear. You want to scroll down through the choice of wizards in this list to **FINISHED\_REPORTS**. Highlight **FINISHED\_REPORTS**. Choose **OK**:

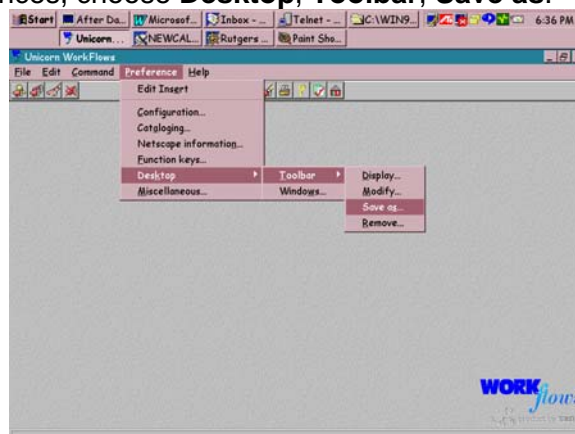


- 4) The Select Function Key window will appear. Accept the Default of NONE by choosing **OK**.

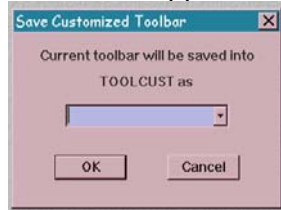
- 5) The following icon for the Finished Reports wizard will now appear on your toolbar where you right-clicked on the gray space in step 1).



- 6) Remember: When you add a wizard to your toolbar in order for this wizard to remain on your toolbar, you **MUST** save the toolbar as a custom toolbar by doing the following:  
Under preferences, choose **Desktop, Toolbar, Save as**:



The following window will appear asking you to save your custom toolbar:



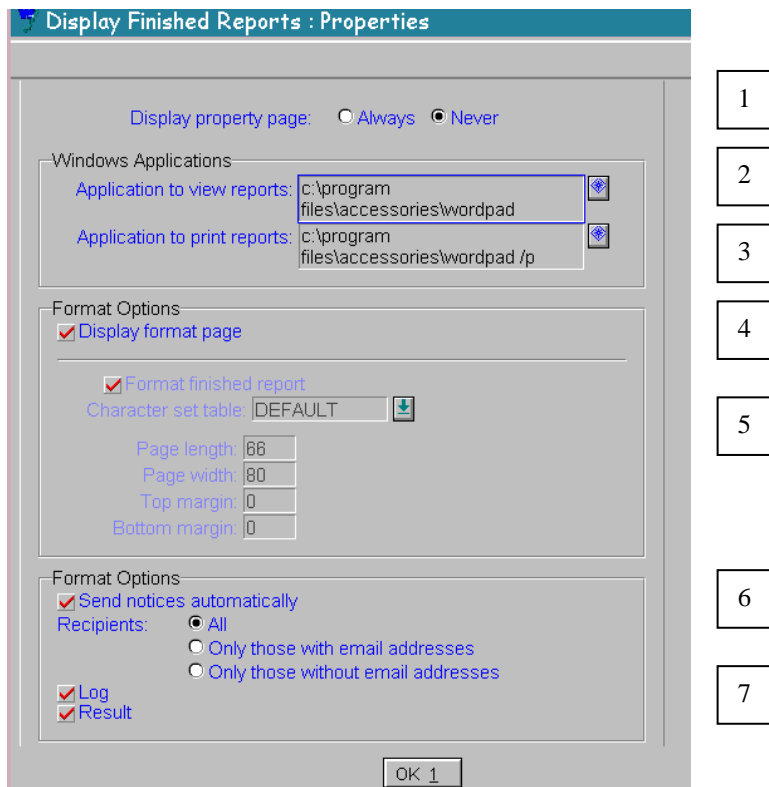
In all CAPITAL LETTERS. Name the toolbar something meaningful other than the delivered toolbar names such as cat, or circ. Example KARENSYS or KREPORT. (note if you use a delivered name such as cat, circ, resv you will run into problems at a later time. The all capital letter convention will help it stand out).

Choose **OK**.

The toolbar will be saved on your PC for future WorkFlows sessions. As with any other PC data, it would be a good idea to make a copy of this toolbar on the T drive. (If you need help doing this please talk to your PC coordinator).

## II. Setting Properties for Printing Finished Reports

The first time you enter the Finished Report wizard you will be asked to set properties in order to use that wizard:



- 1
- 2
- 3
- 4
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- 6
- 7

1) Display Property page. The default is Always. Change this to Never. If you leave it at Always, every time you go into finished reports you will see this page. If you change it to Never you will only see this page when you right-click on the Finished Reports wizard and choose properties.

Windows Applications Section:

2) Application to view reports. This should be already set to c:\program files\accessories\wordpad as displayed above.

3) Application to print reports. This should be already set to c:\program files\accessories\wordpad /p as displayed above.

Format Options Section;

4) Make sure the box to Display format page is checked as shown above. This will allow you to alter the page margins for each report to suit your print needs. (More directions below in Step III).

5) The Format options for Character set table and page dimensions will become dimmed after you check the Display format page in #4. This is because you will be setting these options for each individual report. Go to step 6.

Format Options

6) Uncheck the box to Send notices automatically. The reports you work with will not contain this option but this box should be unchecked. When you un-check the Send notices automatically box in #7 the Recipients radio buttons will become low-lighted. You will not be able to work with them. Go on to step 8.

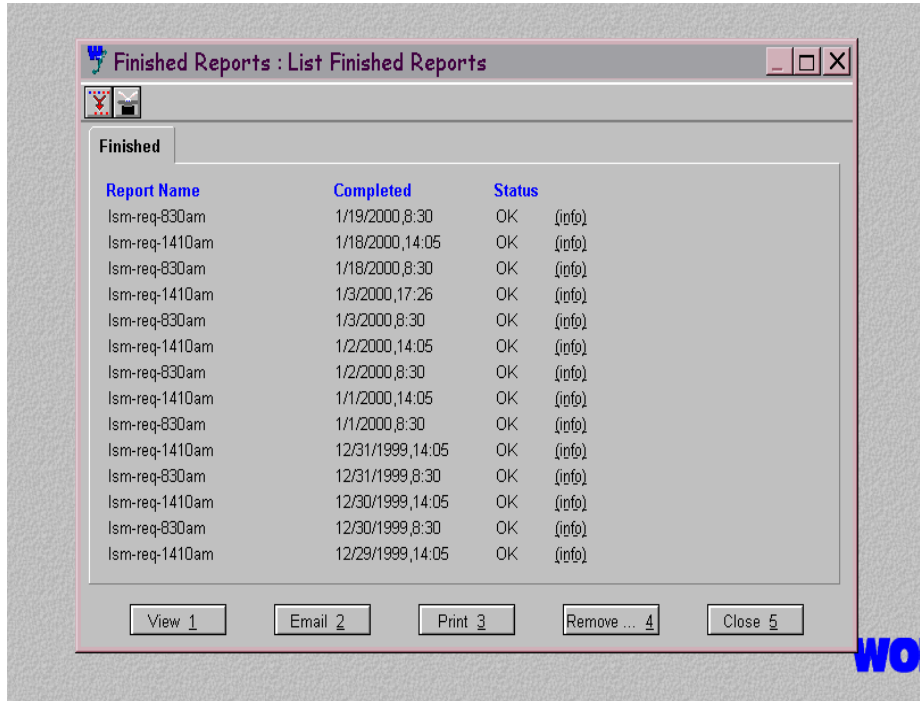
7) Make sure that both the Log and the Result radio buttons are checked. As in the old style printing, the log tells you the information about your report, the results are the actual printed results.

**Note: You should only have to do steps I and II when you are first setting up report printing. Once the Finished Reports wizard is on your customized toolbar and your properties are set you can use the Finished Report wizard for all of your printing needs. For this reason I have continued step III on the next page.**

### III. Printing Finished Reports:

Just a reminder (again!): Printing in WorkFlows takes you into the Windows application WordPad. Make sure you DO NOT already have a copy of WordPad running in the background!!!

1) When you double click on the Finished Report wizard finished reports for your WorkFlows login will appear



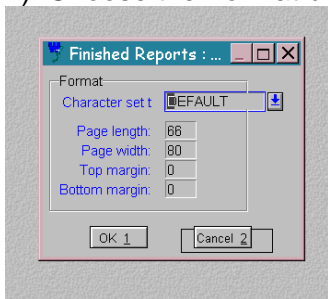
Helpers to Filter Reports and to Update the List. See SIRSI training doc for more info.

You will see a list with columns for **Report Name**, **Completed**, and **Status**. Report Name is the Name of the finished report, Completed lists the date and time the report finished and status tells if the report finished OK or in error.

2) Single-click on the name of the finished report that you wish to view. It will turn blue.

3) Choose the View button at the bottom of the window.

4) Choose the Format button



Leave the Character set as DEFAULT.

Page Length, Page width, Top margin, Bottom margin are where you set you page specifications. This is like setting these in the old-style "blue screen" printing process. However some experimentation may be necessary to format the page the way you want it appear in WordPad because this information is being transferred into a word processing program (WordPad) and fonts and margins may vary.

Choose **OK**.

6) An information screen about the report you are going to view will appear:



Make sure all three boxes (View log, View result, Format report) are checked as shown above. Choose **OK**.

7) WorkFlows will now open a copy of WordPad with your report data. Use the WordPad controls to work with data and to print.

Note: You can directly print from the Finished Reports screen in step 1 of this section. However you will not see how long the report is or where the margins are set. **Do not** directly print a finished report without viewing it first!! You can choose the print button within WordPad.

8) When you are finished viewing/printing your report close out of your WordPad application.

#### **Some Notes:**

If you change the properties for Finished Reports you will be asked if you want to save the properties you set at the end of your WorkFlows session. Like any other property that you set, it will be saved to your PC if you choose Yes.

#### Troubleshooting:

- 1) You don't see any finished reports: Your login may not have the correct report group. Notify systems.
- 2) You click on the View option but WordPad does not open (nothing happens).
  - a) make sure the WordPad path is set correctly in properties.
  - b) Ask your PC coordinator to make sure WordPad is installed correctly on your PC. WordPad is a standard Windows 95 program and should be there!

The WorkFlows Reports manual is located at:

<http://www.iris.rutgers.edu/docs/sirsidoc/training/REPORTNT.PDF>

This will open an Adobe Acrobat window. Look at the section on Display Finished Reports Wizard.