3 November 2022

Subject: New Format to End of Month Reports

Over the last several months, we have been sending new reports to every library's RSA Gmail account. These are intended to replace some of the legacy Workflows monthly reports that are unclear, outdated, or hard to read. The existing end of month reports were designed in 2007 to answer a required online circ and ILL form. That form was retired around 2010. Our other objective is to consolidate many of the old reports down into only a handful.

Here is the current list of new end of month reports and the names of the existing legacy reports they replace.

New Report Email Subject (Email sender "Distribution Services")	Replaces Legacy Report(s) with Email Subject Line (Email sender "Library_Staff_and_RSAcat")	Legacy Report Name on Attached Report File (if different than email subject)
Monthly Reports - Circulation Last 12 Months	Charge by ItmType July1-June 30	
	Renewal Item Type July1-June30	
	Circ by UserProfile July1-June30	
Monthly Reports - Circulation Last Month	Charge by loc Type Last Month	
	Renewals by Location	
	Total Circ by Loc Last Month	
	Circ by Item Type Last Month	
	Renewal by Item Type Last Mnth	
	Circ by UserProfile Last Month	
Monthly Reports - Holds ILL Received Last 12 Months	n/a – This is a new end of month report	
Monthly Reports - Holds ILL Received Last Month	A1 (minus your library) on ILL Monthly Stats	ILL Borrowing Requests
	A2 and A3 (ILL-US) on ILL Monthly Report	ILL coming into your LIB
	A2 Add to D1500 in ILL Monthly Stats	Transit to Lib Last Month

Monthly Reports - Holds ILL Sent Last 12 Months	D1500 Report July1-June30	
	Transit from Lib July1-June30	
Monthly Reports - Holds ILL Sent Last Month	B2 and B3 on ILL Monthly Report	D1500 Report Last Month
	B2 (Plus D1500 rpt) on ILL Monthly Report	Transit from Lib Last Month
Monthly Reports - User Counts, part 1	Expired Users by User Profile	
Monthly Reports - User Counts, part 2	Users Created in Last Mnth	
Monthly Reports - Discard Document	n/a – This is a new end of month report	
Monthly Reports - Discard Document, Pt. 2 - Items without OCLC Number	n/a – This is a new end of month report	
(Legacy Reports with no replacements yet)	Circ by Branch July1-June 30	
	C1 (minus your Library) on ILL Stats Report	Circulation By Branch
	Total Circ by Libr Last Month	
	Total Circ Lib July1-June30	
	B1 ILL state Report	ILL Requests Received

We have nothing to announce about the last few legacy end of month report replacements yet. If you need their data, the old reports remain accurate. Please note, the B1 ILL state Report/ILL Requests Received report has never been accurate because Symphony doesn't record per-library specific hold counts for System-wide hold requests.

RSA will continue to update any new information about end of month reports via the listserv.

Please begin to transition to using the new reports sent from Distribution Services. As some point after the start of the new year, we will discontinue the legacy reports with replacements. This will clean up your email, reduce confusion, and clear up a bunch of reporting time in Symphony on the first of the month.

Please don't hesitate to email the helpdesk (help@rsanfp.org) with any questions or suggestions.

Thank you.