

## 4.5 PREPARING AND SENDING REPORTS

Reports can be sent to one or more destinations. A *destination* can be:

- an e-mail address
- a printer

Usually, every report definition also contains destinations, which are considered when sending reports.

When preparing and sending reports to destinations, you can select between three options:

- **printing**: the report is prepared and sent to the default destination, i.e. the printer (the destination e-mail address is not taken into account) – the **Object / Print** method
- **sending**: the report is prepared and sent to the default destinations, i.e. the printer and e-mail addresses – the **Object / Send** and **Class / Send** methods
- **submitting and sending**: first the report is submitted, then prepared and sent to its default destinations, i.e. printer and e-mail addresses – the **Object / Submit and send** method

### *Procedure*

1. Find and select the object or select the class.
2. Select the method for sending the report to its destinations:
  - **Object / Print**
  - **Object / Send**
  - **Object / Submit and send**
  - **Class / Send**
  - **Class / Create report from queue**

After selecting the **Object / Print** or **Object / Send** method, the **Report definition selection** window will open, containing a list of report definitions. Report definitions are the most important type of definitions in the COBISS3/Reports software module, on the basis of which reports about the data from the database are being prepared, which can then be sent to different *destinations*, i.e. printers and e-mail addresses. Each *report definition* defines the content and form of every report as well as the destination, to which the report is sent. For each class, there can be more report definitions (e.g. the list of report definitions for the **Order** class contains report definitions for orders, order cancellations, claims for received materials, etc.). A part of every list of report definitions is the *Basic report*, which can be used to display a list of attributes and their values for any selected object from any class. If the object is only related to one other object from another class or only has one aggregated object, the attributes and attribute values of that object will also be displayed.



Note:

*If you select the **Class / Send** method, the search window for the selected class will open first. Find the objects, for which you would like to prepare and send the report to its destinations. The window for selecting the report definition will open once you have selected the desired objects.*

*If you select the **Class / Create report from queue** method, the window containing a list of created report queues for the selected class will open. The window for selecting the report definition will open once you have selected the report queue, which contains the objects you would like to take into account when you send reports to their destinations.*

3. Select a report definition. You can do that in two ways:

- select it by using the arrow keys <up>, <down> and then press <Enter>
- click on it to highlight it, then click the **OK** button



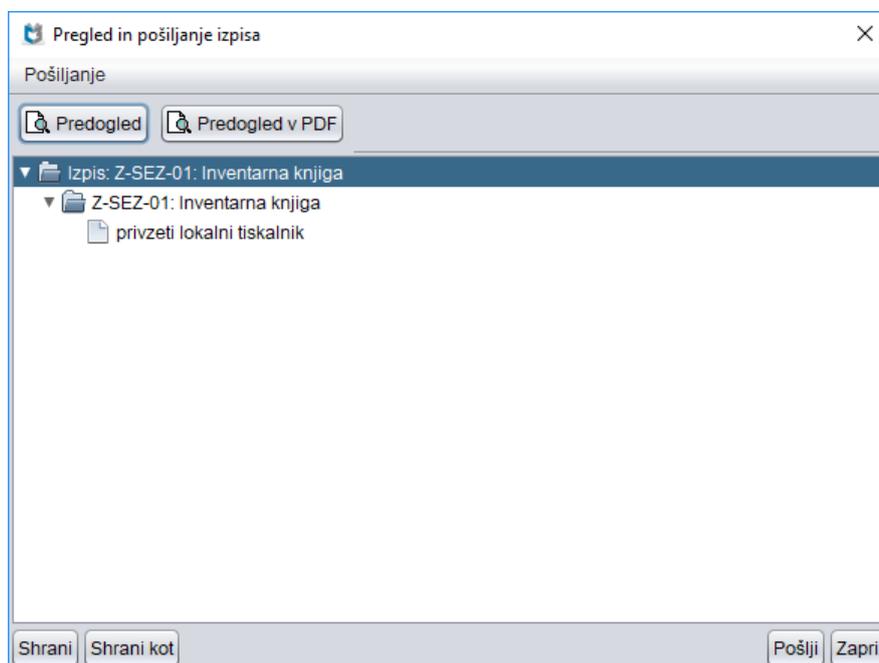
Note:

*When you select the **Submit and send** method, the report definition will be preset by the programme, in which case the window for selecting a report definition will not open. Only the first part of the method will be performed, i.e. the report will be submitted.*

The **Overview and sending of created report** window will open, displaying a list of all prepared forms for that particular report. Each form contains the number of the document and the destination, to which it will be sent.

4. You can preview the prepared report or the individual form in the preview window (see chapter 4.5.1).
5. You can preview the prepared report or the individual form in PDF viewer (see chapter 4.5.2).
6. Before you send a report, you can add destinations (see chapter 4.5.3).
7. Before you send a report, you can edit the destinations (see chapter 4.5.4).
8. Before you send a report, you can remove one or all destinations (see chapter 4.5.5).
9. When you send a form to an e-mail address, you can attach a file (see chapter 4.5.6).
10. You can also remove the file which you have previously attached to the e-mail address (see chapter 4.5.7).
11. You can edit a form before you send it to an e-mail address (see chapter 4.5.8).
12. Before you send a report, you can specify the first page of the report (see chapter 4.5.9).

13. You can save a prepared report (e.g. a statistical overview, which takes a long time to prepare) in an XML file and print it out later using the COBISS3/Reports software module (see chapter 4.5.10).



**Figure 4.5-1: Overview and sending of created report**

14. You can also save the prepared report in a text file (see chapter 4.5.11) or and XLS file (see chapter 4.5.12). The content of the text file or the XLS file can be edited later
15. To send a report to its destinations, click the **Send** button.  
The report will be sent to its destinations, i.e. printed out on the printers or sent to the e-mail addresses. In documents, which are sent by e-mail and contain fricatives, the fricatives will not be displayed.
16. To exit the **Overview and sending of created report** window without sending the report to its destinations, click the **Close** button. The report will not be sent to its destinations. If you selected the **Submit and send** method, the report will have been submitted already.

## 4.5.1 Preview

### *Procedure*

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.
2. Click the **Preview** button.  
The preview window for the prepared report or form will open.
3. To see the next page of the prepared report or form, select **Page / Next page** or press the key <PgDn> (Page Down).

4. To see the previous page of the prepared report or form, select **Page / Previous page** or press the key <PgUp> (Page Up).
5. To see the first page of the prepared report or form, select **Page / First Page** or press the <Home> key.
6. To see the last page of the prepared report or form, select **Page / Last Page** or press the <End> key.
7. To print a report or form on the printer, select **Preview / Print** or click the **Print** button.
8. To close the preview window, select **Preview / Close** or click the **Close** button.

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## 4.5.2 PDF preview

### *Procedure*

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.
2. Click the **PDF preview** button.

A PDF viewer (e.g. Adobe Reader), which is a global standard for viewing PDF files, will open. You can view and check the prepared report or form, you can even save it to the selected folder on your local disk (as a PDF file) or you can print it (the whole file, selected page range or only selected pages).

If the PDF viewer is not installed on your computer, after selecting the method, a Windows dialog box will open, where you are asked to choose the program you wish to use to open the prepared report. Close the dialog box by clicking the **Cancel** button. After that, install the PDF viewer (you can download it free of charge at <http://www.adobe.com/>).



**Tip:**

Use PDF preview when you wish to save a file with a certain report, which takes a long time to prepare, to a folder on your local disk for example, or when you want to print a limited range of pages of a longer report (e.g. when you want to print only certain pages or a certain range of pages of a longer report).

After closing the PDF viewer, you will return to the **Overview and sending of created report** window.

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## 4.5.3 Adding a destination

### *Procedure*

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.

2. Select the **Sending / Add destination** method.

The window for adding a destination will open. You can add a printer, an e-mail address or an e-mail address from your personal address book.

3. Select the type of destination. You can do that in two ways:

- select it by using the arrow keys <up>, <down> and then press <Enter>
- click on it to highlight it, then click the **OK** button

The window for adding destinations will open (see chapters 5.3.2, 5.3.1 and 5.3.3).

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## 4.5.4 Editing destinations

### *Procedure*

1. In the **Overview and sending of created report** window, click on the destination to highlight it.
2. Select the **Sending / Properties** method.

The window for editing destination will open (see chapters 5.3.2 and 5.3.4.1).

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## 4.5.5 Removing destinations

### *Procedure*

1. In the **Overview and sending of created report** window, click on the destination to highlight it.
2. Select the **Sending / Remove destination** method.

To remove all destinations, select **Sending / Remove all destinations**.

The **Confirm** window will open with question "Are you sure you want to remove?"

3. Click the **Yes** button.

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## 4.5.6 Adding attachments

### *Precondition*

The attachment is saved in a file in one of the following formats: .pdf, .ps, .jpg, .jpeg, .gif, .tif. The recipient has an e-mail address, to which the form with an attachment can be sent.

### *Procedure*

1. In the **Overview and sending of created report** window, click on the destination (e-mail address) to highlight it. If there is no such destination, you can add one (see chapter 4.5.3).
2. Select the **Sending / Add attachment** method.

The **Adding an attachment** window will open, which gives you access to all the folders stored on your computer.

3. Find and select the file you wish to attach.

Under "Select folder", the name of the source folder will be displayed. To select a new folder, click the drop-down list and select the desired disk drive. In the list, which will be displayed under the selected drive, find the desired folder and file. Click on the file to highlight it. The file name will be transferred to "File name".

4. Click the **OK** button.

Below the destination, the information about the attachment will be displayed: attachment location (i.e. the path to the folder, where the file is saved) and file name.

You can add several attachments to each e-mail address. To add a new attachment, repeat steps 2 to 4.

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## 4.5.7 Removing attachments

### *Procedure*

1. In the **Overview and sending of created report** window, click on the attachment to highlight it.
2. Select the **Sending / Remove attachment** method.

The **Confirm** window will open with the question "Are you sure you want to remove?"

3. Click the **Yes** button.

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## 4.5.8 Editing e-mail contents

### *Procedure*

1. In the **Overview and sending of created report** window, click on the e-mail address (destination) to highlight it.
2. Select the **Sending / Edit e-mail content** method.

The **E-mail content editor** window will open.

3. Change the content.
4. Click the **OK** button.

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## 4.5.9 Setting starting page number in a report

You can set the starting page number for the prepared report.

**Procedure**

1. In the **Overview and sending of created report** window, click on the report to highlight it.
2. Select the **Sending / Set starting page No.** method.

The **Set starting page number** window will open, where you can define which page number the report will start with.



Example:

If you want the report to start with e.g. page number 121, enter the value *121* under "Start numbering at".

3. Click the **OK** button.



Note:

*You should set the starting page number only for longer reports (e.g.: H-L-01: Accession book), where the numbering does not consist of the page number and the total number of pages but displays only the page number.*

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## 4.5.10 Saving reports in XML file

You can save the prepared report in a XML-file in the previously defined folder, and print it later in the COBISS3/Reports software module.

**Procedure**

1. In the **Overview and sending of created report** window, click the **Save** button.  
The **Specify file name** window will open. Enter the name of the file, in which the report will be saved.
2. Click the **OK** button.

Once the report is saved, the **Message** window will open containing information about the saved file: file location (i.e. the path to the folder, where the file is saved) and file name. To close the window, click the **OK** button.

To search for a file in the COBISS3/Reports software module, select the desired report definition and then the **Creating reports / Browse stored reports** method. After you select the method, the **Select report** window will open, which gives you access to the predefined folders for storing prepared reports. Find the folder; highlight the file, in which you saved the report and click the **Open** button. The **Overview and sending of created report** window will open, which you can use to send the report to its destination by clicking the **Send** button.

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### 4.5.11 Saving reports in text file

You can save the prepared report in the text file in any folder. You can edit and print the content of the file.

#### *Procedure*

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.

2. Click the **Save as** button.

The **Saving report** window will open which gives you access to all the folders stored on your computer.

3. Under "Save in", find and select the folder.
4. Under "File name", the name of the file will be displayed, which consists of the date, time and name of the report. The file name can be changed.
5. Under "File type", the format of the file, in which the report is saved, will be displayed. The format .txt is defined.
6. Click the **OK** button.

You can find the file, in which the report was saved, using the Explorer (Windows Explorer). You can edit the file using any programme for word processing (e.g. Notepad, WordPad, MS Office Word, etc.).

You can also import text files using the Microsoft Office Excel. This is best used when the report form is defined so that the data, which is saved in the text file, will be appropriately copied to the cells on the worksheet after the import.

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### 4.5.12 Saving reports (statistics) in XLS-file

You can save the prepared statistical report in a XLS-file in any folder. You can edit and print the content of the file.

#### *Procedure*

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.

2. Click the **Save as** button.

The **Saving report** window will open which gives you access to all the folders stored on your computer.

3. Under "Save in", find and select the folder.
4. Under "File name", the name of the file will be displayed, which consists of the date, time and name of the report. The file name can be changed.
5. Under "File type", select the format *Excel Files [UTF-8] (.xls)*.
6. Click the **OK** button.

You can find the file, in which the report was saved, using the Explorer

(Windows Explorer). You can edit the file using MS Office Excel.