

B.1 CREATING REPORTS

B.1.1 Creating and printing reports

Some reports for acquisitions (e.g. reports on the use of financial means, different internal lists, etc.) are created and printed in the COBISS3/Reports module. The module is available from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Acquisitions** folder and select the group that contains the definition of the report you wish to create.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you wish to create.
3. Select the **Creating reports / Create report** method.

The **Enter parameters for report creation** window will open. When creating certain reports, entering input parameters is not required.

4. Enter input parameters.

You can save the values of input parameters (see chapter *B.1.1.1*); you can select (see chapter *B.1.1.2*) or delete (see chapter *B.1.1.3*) saved parameters.

5. Click the **OK** button.

The **Overview and sending of created report** window will open from where you can send the created report to the predefined or changed destinations. You can also save it in a file and send it to destinations at a later point (the procedures are described in the *Basic Guidelines COBISS3 User Manual*; see chapters *4.5*, *4.5.10*, *4.5.11* and *4.5.12*; see also chapter *4.5.2*).




Note:

Reports from the Acquisitions folder (i.e. different documents such as Order, Cancellation, Claim) are usually created and printed during certain procedures in the COBISS3/Acquisitions module.

B.1.1.1 Saving input parameters

Procedure

1. In the **Enter input parameters for report creation** window, save the entered parameters by clicking the  icon under "Load/save parameters".
The **Configuration name** window will open.
2. Enter the name under which you will save the entered input parameters.
3. Click the **OK** button.
If you enter a name that already exists, the software alerts you and input parameters are not saved.




Note:

A saved set of parameters is available to all users of the library.


B.1.1.2 Selecting saved input parameters

Procedure

1. In the **Enter input parameters for report creation** window, select a set of saved parameters from the drop-down list under "Load/save parameters".
2. You can change the loaded input parameters.
3. The previous state of input parameters is restored by clicking the  icon.

B.1.1.3 Deleting saved input parameters

Procedure

1. In the **Enter input parameters for report creation** window, from the drop-down list under "Load/save parameters", select a set of saved parameters that you wish to delete.
2. Click the  icon.
A window with the following question will open: "Are you sure you want to delete this parameter configuration?".
3. Click the **Yes** button.

B.1.2 Creating and printing scheduled reports

The COBISS3 software enables storing jobs that can be performed at a later point. So far, only the *Create report* job type is automatically defined for performing scheduled jobs, which enables you to specify the time for the job to be performed in a report you selected. Execution time for scheduled reports is specified in the COBISS3/Reports module, typically for longer reports, which should be created outside working hours. The module is available from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Acquisitions** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.
2. In the list of definitions select the definition of the report for which you wish to create a scheduled task.
3. Select the **Creating reports / Create scheduled report** method.

Based on the selected report definition either the search window or the **Enter parameters for report creation** window will open. When preparing some reports, searching for records or entering the entry parameters is not required.
4. Find and select objects or define the parameter values that should be taken into account when creating the report.
5. Click the **OK** button.
6. The **Edit job** window will open, where you can define a new job:
 - Under "Job name", enter the name under which the job will be saved to the list of the previously saved jobs. The data is mandatory.
 - Under "Execution time (dd.MM.yyyy HH:mm:ss)", set the date and time for the job to be performed.
 - If you wish that the task is carried out periodically (e.g. every day, every week, every month, etc.) select the desired value from the drop-down list under "To be repeated".
 - The data under "Status" is entered and changed automatically when the job is saved.
 - Under "Job type", the *Create report* job type is already selected.
7. Click the **OK** button.

After the new job has been saved, a notification about a successful registration of the scheduled report will be displayed and the job will get the status *created*. Once the job is performed, its status changes to *completed*. You can edit or delete the saved job (the procedure for editing jobs is described in the *Basic Guidelines COBISS3 User Manual*; see chapter 4.8).

When the report is created, a notification about the job is sent to the e-mail of a librarian who defined the job. Another notification is sent to the same e-mail address if the report could not be created as it failed to meet the conditions for creating a report or an error occurred during the creation of the report.

If the report was successfully created, you can, after you receive the notification about the job, find the saved file containing the report and send it to destinations (see appendix *B.1.3*).



Note:

Tasks that are repeated periodically (e.g. every day, every week, every month, etc.) always have the status *created* (and never get the status *completed*).

B.1.3 Finding saved files containing reports

You can find a saved file in the COBISS3/Reports module. The module is available from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Acquisitions** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you created and saved as an XML-file in a predefined folder and that you wish to print out or send by e-mail.

3. Select the **Creating reports / Browse stored reports** method.

The **Select report** window will open containing folders with stored reports. Under "Select folder" the name of the folder is displayed containing the saved file with the reports you created based on the selected definition.

4. In the selected folder, select the desired file with the created report. Its name will be transferred to "File name".

5. Click the **Open** button.

The **Overview and sending of created report** window will open, from where you can send the created report to predefined or changed destinations (the procedure is described in the *Basic Guidelines COBISS3 User Manual*; see chapter 4.5).

B.1.4 Deleting saved files containing reports

You can find the files you wish to delete in the COBISS3/Reports software module. The module is available from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Acquisitions** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you created and saved as an XML-file in a predefined folder and that you wish to delete.
3. Select the **Creating reports / Delete stored reports** method.
The **Select report** window will open containing folders with stored reports. Under "Select folder" the name of the folder is displayed containing the saved file with the reports you created based on the selected definition.
4. In the selected folder, select the desired file with the created report. Its name will be transferred to "File name".
If you select several files at the same time, the names of all the selected files with created reports will be transferred to "File name".
5. Click the **Delete** button.
A window will open with the question "Are you sure you wish to delete the selected files containing reports?".
6. To delete, click the **OK** button.