A.1   CREATING AND PRINTING REPORTS

To access the COBISS3/Reports software module from the browser, select **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** 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 preparing some reports, searching for records or entering the entry parameters is not required.

4. Enter the input parameters and click the **OK** button.

    The **Overview and sending of created report** window will open. Use it to send the created report to previously defined or changed destinations. The process of sending reports to their destinations and saving reports is described in the *COBISS3 Basic Guidelines* User Manual *(*see chapter *4.5.*).

Tip:

Before printing the report, you can open and preview it on your screen by clicking the **Preview** button.

A.1.1   Creating and printing scheduled reports

The COBISS3 software enables saving jobs which can be executed later. Currently, only the *Create report* job type which enables you to define the time when the job should start is software-defined for performing scheduled jobs. Execution time for creating scheduled reports is defined in the COBISS3/Reports module, usually for larger reports that should be created outside working hours. You can access the module from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** 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 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 the reports 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 define a new job:

   - Under "Job name", enter the name, under which the job will be saved in the list of saved jobs. Data is mandatory.

   - Under "Execution time (dd.MM.yyyy HH:mm:ss)", set up the date and time when the job should be carried out.

   - The data under "Status" is entered and changed automatically when you save the job.

   - Under "Job type", the job type *Create report* is already selected.

7. Click the **OK** button.

When you save a new job a message will be displayed about the successful registration of scheduled report creation and the job will receive the status *created*. The saved job can be edited or deleted (the procedure of editing jobs is described in the *COBISS3 Basic Guidelines* User Manual, see chapter *4.8*).

> Note:
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> 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*).

Once the report is created, a notification about the job will be sent to the e-mail of the librarian who defined the job. In case the report was not created because the conditions for creating the report were not fulfilled or because an error occurred while creating the report, a notification will be sent to the same e-mail address.

If the report is successfully created and after you receive the notification, you can find the saved file which contains the report and send it to destinations.

A.1.2   Browsing stored report files

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

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** 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 you now wish to print or sent by e-mail.

3. Select the **Creating report / 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 which you can send the prepared report to previously defined or changed destinations (the procedure is described in the *COBISS3 Basic Guidelines* User Manual; see chapter *4.5)*.