Run an OLIB report

Learn how to run an OLIB report.

Run a report from the hitlist

If you know that the report you want to run is configured correctly and has all the runtime parameters correctly set, you can run the report from the Reports hitlist. To do this, select the report to run and then choose the Run Report option on the Other Actions drop-down list:

This will execute the report using the saved parameter values and output type information.

Set the runtime parameters and previewing the report

To set or modify the runtime parameter values for a report and/or to preview it before running it, open the report record in modify mode. This can be achieved directly from the hitlist using the modify icon:

Enter parameter values

Runtime parameters are presented as a set of parameter selection/parameter value pairs on the main Run Report sheet:
Parameters can be entered either by typing directly into the parameter value field on the right, or by selecting from the parameter selection date picker or drop-down list field on the left. Selecting a value in a parameter selection date picker/drop-down list will automatically copy the selected value into the parameter value field. Once the value is copied into the respective parameter value field, you can amend it manually.

If the parameter selection field is a date picker, the date you select will be copied into the parameter value field in the format required by the report and as indicated in the field label, e.g. Start Date (DD/MM/YY).

If the parameter selection field is a drop-down list, selecting an option from the list will add the key ID to the parameter value field. If the report is designed to allow multiple values, the drop-down selection will add the selected value to a comma separated list of values in the parameter value field. Note, however, that values will not be repeated in this list, i.e. in the above example, if you select the MAIN location again, it will not be added to the parameter value field again.

Mandatory parameter value fields will be highlighted as such. In the above example, they are highlighted with a yellow background, although note that this will vary depending on how your OLIB system has been configured to highlight mandatory fields. You must enter a value in these fields before previewing or running the report.

All drop-down lists include a Clear option at the bottom to enable you to clear the parameter value field with a single click.

Some reports include runtime parameters that are just parameter value fields, e.g. CA013c – Sortable Accession List (for exporting to Excel), which includes runtime parameters for Start Shelfmark and End Shelfmark. The runtime parameters should be entered directly into these fields.
Rolling dates

Some reports, e.g. CI011, use the rolling date drop-down list parameter selection option:

Selecting an option from the rolling dates drop-down list will present a parameter value in the form of an SQL clause, together with a description enclosed by SQL comment tags. For example, “(15) Previous Month End” will appear as:

/* Previous Month End */ to_char(last_day(add_months(sysdate,-1))+1, 'DD/MM/YY')

This clause will be run dynamically at the time the report is executed.

In this example, the -1 immediately following sysdate represents the previous calendar month. If you want to report on 3 calendar months ago, for example, rather than the previous calendar month, the value can be amended to refer to the end of n months ago by changing “-1” to “-n”, e.g.:

to_char(last_day(add_months(sysdate,-3))+1, 'DD/MM/YY')

The date format specified here will be suitable for the report query and should not be changed.

It should be noted that the selected value may not be intuitive for the report. For example, EN001 (Monthly Enquiry Statistics By Division) is configured to give an analysis by month. So even if you select the ‘Monday Of Previous Week’ and ‘Monday Of This Week’ options for this report, it will report on the month or months in which these days fall.

**Academic Year options:** The default academic year runs from September through August inclusive. Refer to the System configuration section on page 32 for information on how to amend this.

Note: when you actually run a report using the Run Report button (or when you click Save and Close or Save and Continue), the values that you have entered in the parameter value fields will be saved to the database. If you re-run the report in the future, or if you schedule the report to be run on a regular basis, these values will be used as input into the report unless you change them again before the report is re-run.
Specify an Output Type

The Output Type field is used to specify what type of output is desired. Only targets suitable for the report you are working on (as defined by the report definition – see below) are available to select from.

Preview

To preview a report, click on the Preview Report button. If this is the first time this report is being previewed, then you may need to click the Refresh option:

![Refresh](https://help.oclc.org/Library_Management/OLIB/Reports/Use_OLIB_reports/020Run_an_OLIB_report)

The report preview will be displayed in the field immediately below the buttons:

```
EN001 - Monthly Enquiry Statistics By Division (Course) And Cost Centre (Occupation)

Report Date: Tuesday 9 May 2017 08:24:30
Date Range: 04/17 - 05/17
Divisions: All

<table>
<thead>
<tr>
<th>Course 2</th>
<th>No Cost Centre</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Article request</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Articles supplied</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>
```

In addition, a Preview Only entry will appear in the Report Run History field on the Report History tab. Repeated Preview actions will overwrite the existing Preview entry rather than generating a separate entry for each preview.

Run a report

Before running a report, enter the recipient’s email address either straight into the Email(s) field or as a mail list on the Email List field on the Report Scheduling tab.

If you are using the Email(s) field, multiple recipients should be entered with a semi-colon between email addresses. Recipients can be CC’d or BCC’d using the cc: or bcc: prefix. For example:

John.smith@myorganisation.org ; Richard.williams@myorganisation.org ; cc:ben.matthews@myorganisation.org ; jane.edwards@myorganisation.org

In this example, the report will be sent to john.smith@myorganisation.org and Richard.williams@myorganisation.org in
the To list, with ben.matthews@myorganisation.org and jane.edwards@myorganisation.org in the CC list.

To run a report, click the Run Report button. The report will be run and sent to the specified recipients. In addition, an Emailed OK entry will be included in the Report Run History field on the Report History tab.

GETStream

Clicking on the GETStream URL button will populate the GETStream URL field with the GETStream URL for this report, for example to utilise for reading the report output directly in Excel.

Parameters with dynamic values (e.g. rolling date options such as "Previous Calendar Year Start" and "Previous Calendar Year End") are not included in the GETStream URL as their values will be generated at runtime.

The GETStream URL button will also update the GETStream URL in any Excel template that is attached to the Report Definition.

Note that the GETStream URL will be different depending on whether the report is defined in such a way as to allow anonymous GET (see below).

GETStream reports in a browser

To run a report in a browser, copy the GETStream URL to your clipboard and paste it into your browser’s address bar.

Tip: if the report that you want to run as a GETStream report has a parameter value stored in the database but you want to run the GETStream report without applying that value, you can add &param[n]=*EMPTY* to the GETStream URL (replacing [n] with the relevant parameter number).

Note that if the parameter is flagged as mandatory and you include &param[n]=*EMPTY* in the GETStream URL, your &param[n]=*EMPTY* will be ignored.

Run a report in Excel without an Excel template

If the report does not have an Excel template attached, you can run the report “manually” in Excel as follows. Firstly, copy the GETStream URL to your clipboard from the GETStream URL field. Once copied, the report can be viewed in Excel by using the From Web option on Excel’s Data menu:
This launches a New Web Query wizard with your Internet Explorer homepage pre-selected.

Replace this Address with the URL copied to the clipboard from OLIB Web and click Go. If this report requires authentication, it will be requested now:

![Windows Security dialog box](https://help.oclc.org/Library_Management/OLIB/Reports/Use_OLIB_reports/020Run_an_OLIB_report)

Here you must enter suitable OLIB Web login details.

After a few moments, the report content will be previewed. The following example shows the result from the CA013c – Sortable Accessions List report:
Clicking on Import will then ask for a location in the spreadsheet in which to start the data:

Select a suitable starting point and click OK.

The data will then be imported into the spreadsheet. The data source is saved with the spreadsheet so that it can be subsequently refreshed by simply clicking on the Refresh All button on the toolbar:
Optionally the data can be set to refresh automatically when the spreadsheet is opened.

**With an Excel template**

If the report has an Excel template attached, this can be found at the top of the attachments list:

Clicking on the GETStream URL button will not only populate the GETStream URL field, but also update the Excel template with your GETStream URL and the currently set static parameter values.

Downloading and opening the Excel template will then require acceptance of two security measures, firstly to enable editing:

![PROTECTED VIEW](https://help.oclc.org/Library_Management/OLIB/Reports/Use_OLIB_reports/020Run_an_OLIB_report)

and secondly to enable external data connections:

![SECURITY WARNING](https://help.oclc.org/Library_Management/OLIB/Reports/Use_OLIB_reports/020Run_an_OLIB_report)

Once these have been accepted, the spreadsheet can be used to retrieve the data from OLIB by selecting *Refresh All* from the *Data* ribbon:
You may then be prompted for suitable login details.

The spreadsheet can also be saved to your PC for simple re-use or circulated to colleagues.

**Schedule a report**

Use the fields on the **Report Scheduling** tab to configure the report to be run daily, weekly or monthly:
Before scheduling a report, enter the recipient’s email address either straight into the Email(s) field or as a mail list in the Email List field. Note that if there are any email addresses in the Email(s) field, the report will only be sent to these recipients. Thus, if you enter email address in Email(s) and if you also specify an email list in Email List, the email list will be ignored.

Select the required frequency (Daily, Weekly or Monthly) in the Frequency Type field and enter a value in the Frequency Value field. For example, select Monthly and 3 to set the report to run every 3 months.

Start/Next Run On: enter a date on which to start the report generation schedule. If this field is left blank, the report will be run the next time the background report job runs (usually every 15 minutes) after the report is saved as Enabled.

Enabled: set to Yes to activate the report schedule.

Email Body: enter some text to include a covering note in the email that is generated.

Enabled: set to Yes to activate the report schedule.

The Once option in the Frequency Type drop-down list can be used to schedule a report to run once. Either set the date
on which it should run in the **Start/Next Run On** field, or leave this blank to schedule the report to be run the next time the background report job runs. Once a report that is scheduled as a Once report has been run, Enabled will be set to No.

**View the execution history**

Each time a report is run or previewed, it is stored as an object in the database. Previous versions of the report can therefore be viewed at any time in one of two ways:

**As an attachment**

The report’s **Attachments** list displays the 13 most recent reports:

To view a previous version, simply select it from this list, and depending on the object type, it will be opened in Word, your PDF viewer or your default browser.

Note that the Attachments option is only displayed when the report is displayed in view mode.

**From the Report Run History field**

The Report Run History field is a list of the previous executions of this report. Included in the list are the date and time of execution, the user who requested the execution, the status and the runtime parameters. Clicking through to the Report History record allows a more detailed view of the parameters, with links to the Object, User and/or Email History record pertinent to this execution.

The **No. Results To Retain** field specifies how many past executions of this report should be retained. By default, the last 53 executions will be retained.

The **No. Attachments To List** field indicates how many attachments are listed in the report’s Attachments list. If nothing is entered in this field, the default number of attachments to list is 13.