Find an overview of the reporting and alerts features available in OLIB Service Pack 11.

**OLIB Reports**

The Reports domain in OLIB has been re-designed to enable it to be used as the primary reporting solution for OLIB.

The significant changes to the Reporting domain include:

- A Keyword Search to enable you to search for a report using a word or words anywhere in the report name, description, parameter prompt fields, email subject line, email body and more.
- Drop-down lists to aid selection of report parameters.
- Ability to preview and run the report on screen.
- Ability to record the previous report output.
- Scheduling of reports.
- To be able to generate a GETStream URL with the click of a button based on the report parameters.
- Availability of a selection of output formats, including as the email body or as an attachment in PDF, MS-Word, comma separated (for MS-Excel), or HTML.
- Incorporates rolling date capabilities and academic year configuration.
- Simplifies the method of delivering new reports via a Reports Repository.

The reporting features documented will only work in OLIB Web. WorldView has not been changed to support them.

The OLIB Reports section is located just below User Management in the OLIB Web Menu:
Where to find OLIB Reports

The OLIB Reports section has been moved and is now located below the User Management domain in the OLIB Web Menu:

The default search for the Reports domain is **All OLIB Reports**. This is a simple left-truncated, case-insensitive search on the reports’ names. For example, entering `ca` will list all reports whose report name begins with CA, the standard cataloguing reports.

Search options are available to list all reports in a specific domain such as Cataloguing, Circulation, Acquisitions,
Collection Management, etc.

There is also a new **Keyword Search** to enable you to search for a report. The keyword search looks for the word or words entered anywhere in the report name, description, parameter prompt fields, email subject line, email body, header output, SQL To Run field, and footer output.

The fields that contribute to the OLIB Reports keyword index are defined in the OLIB Reports Index keyword index in the System Administration-Keyword Indexes domain. The contents of the OLIB Reports Index keyword index can be modified using the standard keyword index maintenance facilities in this domain.

**Running a Report**

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 run the report using the report parameters and output type already saved. The report will be emailed directly to the addresses present in the report.

**To set or modify the report parameters**, open the report record in modify mode. This can be achieved directly from the hitlist using the modify icon.

The report parameters are displayed on the **Run Report** sheet of the Reports layout.
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.

**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 parameters that are **free text value fields**, for example, CA013c – Sortable Accession List (for exporting to Excel) asks for a Start Shelfmark and End Shelfmark range. The parameters should be entered directly into these fields.
Rolling dates

Some reports, for example, CI011 Hourly Circulation report, use a rolling date, such as Current Month Start, Current Academic Year Start, that can be selected from a drop-down menu. This avoids you having to edit the report parameters at the end of each month or year.

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.

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

Academic Year options

The default academic year runs from September through August inclusive. The default values are 01-09 and 31-08 respectively.

These dates can be configured if the Academic Year Start and End for your library are different. A new Reports / Email Configuration sheet is available in OLIB Defaults.
These dates can be configured in the Academic Year Start and End fields if they are different from the default values.

When the start date is changed, you will see that the end date defaults to the day before the new start date. Also, the displays immediately to the right of the fields are updated.

The end date can be amended independently of the start date.

**Choosing an Output Format**

The Output Type field is used to specify how the report is exported.

Here the report can be exported as a HTML attachment or an HTML formatted email. Only targets suitable for the report are available to select.

**Preview a report**

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:

The report preview will be displayed in the field immediately in the preview panel.
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.

**Adding email addresses**

Before running a report, enter the recipient’s email address either straight into the **Email(s)** field.

This field is on both the **Run Report** sheet of the report layout

and the **Report Scheduling** sheet.

Alternatively, you can select an Email List from the **Email List** field on the **Report Scheduling**
Email Lists can be created from the OLIB Reports menu.

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.

### Generating a GETStream URL

Clicking on the GETStream URL button will populate the GETStream URL field with the GETStream URL for this report.
This will allow you to output the report directly to Excel using the GetStream functionality available from OLIL Service Pack 7.

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.

GETStream reports in a browser

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

This allows you to view the content of the GETStream report quickly and easily.

Running a report 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
and secondly to enable external data connections:

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.

**Running a report in Excel without an Excel template**

If the report does not have an Excel template attached, you can still run the report in Excel. To do this, 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**
Depending on the browser you are using, a New Web Query wizard may be launched with your browser 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.

Enter the 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.

**Scheduling a report**

The new Report Scheduling sheet on the Reports layout allows you to schedule a report to be run at a particular time, for example, 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.

```plaintext
Email(s) christine.willott@oclc.org
```

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.

Next, 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 1 to set the report to run every (1) month.

```plaintext
Frequency Type Monthly
Frequency Value 1
```

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.

![Frequency Type](https://help.oclc.org/Library_Management/OLIB/User_guides/Service_pack_11/080Reporting_and_alerts)

**Start/Next Run On**: select a date from the calendar 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.

**Viewing the Report History**

Each time a report is run or previewed, it is stored 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 report, simply select it from this list, and depending on the report type, it will be opened in Word, your PDF viewer or your default browser.

**Note:** The Attachments option is only displayed when the report is displayed in modify mode.

**From the Report History Sheet:** The Report Run History field on the Report History sheet lists the previous executions of the report.

Details included are the date and time the report was run, the user who requested the report, the status and the report parameters.
You can click through to the Report History record to see a more detailed view of the report parameters, with links to the Object, User and/or Email History record pertinent to this execution of the report.

**Configuring the Report History**

A Library can also decide for how long they wish to maintain the report history. This is configured on the Report History sheet of the Report layout.

- **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.

- **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.
OLIB Reports Designer

If you have experience in SQL and report writing, new reports can be written from scratch using the OLIB Reports Designer.

When creating a new report that is not available to retrieve from another system, click New Record from the Reports domain hitlist. A report Parameter Type will need to be selected to change the report layout to the appropriate layout for the parameter type you selected.

Next the report definitions will need to be configured. This includes creating the following:

Report description fields

Report parameters

Report SQL

A separate How-To guide is available on OLIB Reports which describes in detail how to run, schedule and create reports from the Reporting domain.

OLIB Reports Exchange

An OLIB Reports Repository will be hosted and maintained by OCLC. A list of the reports in this repository will be maintained and made available to OLIB customers, together with URLs to retrieve the report definitions.

The list of reports in the repository can be viewed in your browser using the following link: https://reports.olib.oclc.org/repository/GETReport.jsp?reportno=-33
You can limit the report listing to reports that were added or modified since the beginning of a specified number of months ago required.

To do this add the syntax `&param2=1` to the end of the URL. This will list reports that were added or amended since the beginning of the previous calendar month:

https://reports.olib.oclc.org/repository/ReportStream.jsp?reportno=-33&param2=1

Similarly, adding the syntax `&param2=0` will list reports that were added or amended during the current calendar month. This will enable you to more easily identify recently added of modified reports in the report repository, for example.

A listing of the reports held by your library can be retrieved from the following URL: https://ow-myorg.olib.oclc.org/olibweb/?reportno=-33

replacing https://ow-myorg.olib.oclc.org/olibweb/ with your organisations OLIB Web URL.

### Getting the URL

If you have requested a specific report, you will be advised of the URL which you can then use to retrieve the definition from the OLIB Reports Repository. This may be from the OLIB Support Desk in response to a support call.

If you have identified the report yourself from the repository, you can copy the URL directly from there.
For example, to retrieve the **CA013c – sortable Accessions List (for exporting to Excel)** from the repository, copy the link from the **Right-click and copy link location to get this report** hyperlink:

<table>
<thead>
<tr>
<th>CA013c - Sortable Accessions List (for exporting to Excel)</th>
<th>CA013c - Sortable Accessions List (for exporting to Excel)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created: 12th April, 2017</td>
<td>Parameters:</td>
</tr>
<tr>
<td>Accession Data from</td>
<td>Accession Data to</td>
</tr>
</tbody>
</table>

**Download the report**

Once you have copied the report’s URL to your clipboard, you can use it to download the report itself into your OLIB system.

From the Reports domain hitlist (not a report record display), click **New Record**.

- **Save and Close**
- **Save and Continue**
- **Refresh**
- **Cancel**

**Main**

**New Report**

**Definition URL**

**Parameter Type**

**New Report Creation**

**Raw Definition**

*Copy/Paste the code from the URL into this field if your OLIB server cannot reach the URL*

- **Save and Close**
- **Save and Continue**
- **Refresh**
- **Cancel**

Paste the report’s URL into the **Definition URL** field and click **Save and Continue**.

OLIB will then retrieve the report from the repository and it will be ready for you to add the required report parameters, preview, run and / or schedule.

**Run Report**

**Report Name**

**CA011 - Title/Copy Insertions, Updates and Deletions**

**Description**

Counts the Additions, Modifications and/or Deletions as collected in the catalog_stats table. Requires the "Statistics To Record" setting in OLIB Defaults to be enabled.

**Start Date**

**End Date**

**Location(s)**

**Output Type**

**PDF Attachment to email**

**Email(s)**

**GETStream URL**

**Preview / Run Report**

**Preview Report**

**Run Report**

**GETStream URL**


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If the retrieved report has a combination of parameter types that is not compatible with any existing report in your system, then a new layout will be automatically generated for this report type when the report is downloaded from the repository. This layout is not immediately available, so the new report will continue to be displayed using the New Report layout, and the following message will be displayed:

```
The report has been added to your system. Please log out and log back in again to use it.
```

Simply log out and log back in again, then re-display the new report, and it will be displayed using the new layout.

### Updating a report

It is possible that the requirements for a report change over time, or a bug is found in the report. In such cases, the report will be modified or corrected in the OLIB Reports Repository. When you receive notification of updates to existing reports, you can update your copy of the report.

From the OLIB Reports hitlist, select the report to be updated. From the Other Actions box,

![Other Actions](image)

select the **Refresh Definitions** action:

The Refresh Definitions action can be used on multiple reports at a time.

### Sharing reports between institutions

The OLIB Reports Exchange functionality can also be used to copy reports from one OLIB system to another, so that OLIB users can share reports amongst themselves.

A listing of the reports held by a partner OLIB library can be retrieved from the following URL: [https://ow-anotherorg.olib.oclc.org/...p?reportno=-33](https://ow-anotherorg.olib.oclc.org/...p?reportno=-33)
replacing https://ow-anotherorg.olib.oclc.org/olibweb/ with another OLIB library organisations’ OLIB Web URL.

You will be able to download new and modified reports from this repository straight into your OLIB system.

**New Normalisation Test Report**

It is now possible to verify that the Normalise Services are working.

A new system report named SYS006 - Normalisation Test is available.

Modify the report and click the button to Preview it.

OLIB shows this brief output:

```
Normalisation Test
Input: "What does this normalise to?"
Result: "what do this normalise to"
```

The Result shown above indicates that Normalisation is working and how the Input Value was normalised.

The report can also be utilised to check the normalisation result for any other text, as a means of checking a normalised value based on the rules that are in effect.

For example: here the text *the basics of banking is in the CATALOGUE* is entered in the Input value field for checking.
New Potential Duplicate Titles Report

OLIB Reports includes a new catalogue report, **CA015 – Potential Duplicate Titles**, which lists all titles with one or more duplicates.

A duplicate title is defined as having identical first 50 characters of the normalised title and subtitle.

The “main” title is the one with the lowest title number, i.e. the one that was entered first in the database. Duplicate titles are listed under each main title. The title numbers are included in the report as well as the titles.
Changes to the User List Of Loans notice

The User List Of Loans notice has been changed so that it is now sent to users a given number of days in advance of the user’s membership expiry date, irrespective of whether they have items on loan. Previously it was only sent if the user had at least one item on loan.

**Notice Details**

- **Notice No.:** OP004
- **Notice Type:** User List Of Loans
- **Location:**
- **User Category:**
- **Brief Description:** Example Record of Loan Notice

The notice text should be amended to reflect this. For example:

“Your membership will expire on <EXP>. If you have any items on loan, these will be listed below. Please ensure that..."
they are returned before you leave.”

## Changes to User Account Update Alert notice

It is now possible to configure a User Account Update Alert notice so that, if a user’s location is changed, an alert is sent to the user’s previous location to notify library staff that the user has registered with a different location. This way the previous location can archive any user records as appropriate.

**Notice Type** | User Account Update Alert
---

On the user account update alert, library locations must add their location key ID to the Locations field. If more than one location is added, the location key ID must be separated by a semi colon, for example, ;LOC1;LOC2;

**Locations** | ;LOC1;LOC2
---

Set the Transmit Type field to **To user’s former location**

**Transmit Type** | To user’s former location
---

Enter the email addresses of the library staff to which the email should be sent in the **To List** field.

**To List** | library@NorthWestOlc.org
---

Set **Fields To Watch** field to XLOC (no semi-colons, double quotes or anything else - just XLOC.)

**Fields To Watch** | XLOC
---

Set **Enabled** to **Yes**.

**Enabled** | Yes
---

**Note**: If you don’t include the email address in the **To List** field and set the transmit to **To user’s former location**, the notice will not be sent. The email address field in the Location record is **not** referenced by this function.
Broadcast notice can be set to be sent to current or expired users

There is now an additional option on the Broadcast Notice which allows a library to specify whether the notice is to be sent to users with a status of Current or Expired.

A user’s membership status is deemed expired if their expiry date is prior to the current date and time. Otherwise their membership is deemed current.