

## The report list:

- On the main Bibliovation menu, you should see a link for Reports.
- Clicking on that will take you to the main Reports page.
- From here you can click on SQL Reports to get to the listing of the saved reports in Bibliovation.
- At the top of the report list is a “Filter list with tag...” button. Click on that button and choose “On Demand” from the drop-down list to get a list of all of the On Demand reports.
  - All of the Bibliovation versions of the Crystal Reports start with “0 CR –” and will all have the tag “On Demand”.
- Do not run any reports that do not have the “On Demand” tag.

## The individual report pages:

While there is a “Run” button on the first page, you may actually want to click on the name of the report instead to bring up the report page. That’s where you’ll need to go to get the report results anyway so you might as well start there.

The screenshot shows the 'Report Details' page for a report named '0 CR - Daily payment details'. The page has a header bar with the report name and a '1' callout pointing to the 'details' link. Below the header are buttons for 'Back to List', 'Cancel', 'Save', 'Run', and 'Schedule'. The main content area is divided into several sections:

- Report Name:** A text input field containing '0 CR - Daily payment details' with a '2' callout. To the right is the text: 'The descriptive name of this report'.
- Report Type:** A dropdown menu set to 'Tabular' with a '2' callout. To the right is the text: 'Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)'.
- SQL:** A text area containing the SQL query: 'SELECT fee\_transactions.branchcode AS 'Library', payments.date AS 'Made On', payments.borrowernumber AS 'Patron Number', ...' with a '3' callout. To the right is the text: 'SQL SELECT query. Use `__NAME__` for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something\_html. To create an import batch, include a biblionumber column in your results. Enter SQL SELECT queries only.'
- Notes:** A text area containing the text: 'BRANCHCODE is your 3-letter agency code entered in single quotes. Ex: 'MAR' FROMDATE is the start date for the report entered in single ...' with a '4' callout.
- Metadata:** Fields for 'Created Date' (09/26/2019 15:25:31), 'Created By' (Admin, Koha (1)), and 'Last Modified'.

At the bottom of the page is a 'Report Results' section with a '5' callout pointing to the 'Report Results' link.

On the page for the report, there are a number of sections:

1. The Run button. To run the report, click on this button.
2. Report Name: The name of the report.
3. SQL: This is the actual report code. You don’t need to worry about this section.

4. Notes: In this section will be information on what you need to enter to run a report. The prompts aren't all that clear by themselves.
5. Report Results: In this section will be a listing for any reports that have been started or have completed.

### Running a report:

Clicking on the Run button at the top of the page will either start the report or it will cause a pop-up window asking for the report criteria that you want to use for the report. For more information on what to enter for the criteria, either check the report documentation or take a look at the Notes field before running the report.

### Getting the report results:

At the bottom of the page is the list of Report Results. When you start a report, there will be an entry with a status of "pending". When the report has finished, the status should change to "done" (or "error" if there was a problem). You should also get a pop-up message saying the report is complete. Reports are run one at a time with pending reports going into a reports queue to be run in order.

All report results will be down in this section, not just the ones you run. You can look at the results for reports run by other libraries but you won't be able to delete them. The reports that are run from your login will all start with an X icon that allows you to delete the results. You should do that once you've downloaded your report results. Otherwise the results will be automatically deleted after a certain number of days. ***If you want to keep your report results, you need to download the report. They will not remain in Bibliovation, even if you don't delete them yourself.***

To view the report results and download them to an Excel spreadsheet, click on the circular "I" icon. We recommend that you do this as the report may require some work in Excel to get it formatted for printing. You can also click on the X icon to delete the report results when you're done.

Report list with a pending report being run by the current user and two prior reports run by other users, including one that did not run successfully.

Report Results					
	Status ↕	Enqueued ↕	Scheduled ↕	Repeats ↕	Date Run ^
	pending	10/26/2019 20:52:32	10/26/2019 20:52:32		10/26/2019 20:52:32
 	error	10/22/2019 14:33:37	10/22/2019 14:33:37		10/22/2019 14:33:39
 	done	10/21/2019 13:45:57	10/21/2019 13:50:00		10/21/2019 13:50:14

The report list after the pending report completed.

## Report Results

	Status ▾	Enqueued ▾	Scheduled ▾	Repeats ▾	Date Run ▲
  	done	10/26/2019 20:52:32	10/26/2019 20:52:32		10/26/2019 20:52:50
 	error	10/22/2019 14:33:37	10/22/2019 14:33:37		10/22/2019 14:33:39
 	done	10/21/2019 13:45:57	10/21/2019 13:50:00		10/21/2019 13:50:14

### Documentation for the individual reports:

Documentation for the individual reports can be found by clicking on the report link on the SLCS Reports web page ( <https://www.scls.info/ils/reports> ). All On Demand reports can be found in the On Demand section of the report list.