
Reports

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IDEA@ALM provides three different ways to produce reports.

Lists

IDEA@ALM contains many different lists: items, item search results, readers, loans, reader groups, etc. Every list can be printed by invoking the list and using



the **Print** icon from the secondary toolbar. See the **Introduction** chapter for complete details.

Item Reports

Reports that deal specifically with items are generated using either the **Search** section or the **Items** option in the **Cataloging** section. The reports are produced based on predefined report formats and then printed or exported as text or Excel files. The reports are defined and produced using the **Item Report Management** tool. The tool is invoked from the **Items** list or the **Search** results list using the



Print Report icon from the secondary toolbar. See the **Item Reports** section below for complete details.

Business Objects Reports Generator

Business Objects is a software company specializing in business intelligence. IDEA@ALM is supplied with the **Business Objects** report generator and a standard set of reports, which suits most of the needs of a standard library. Users can produce these standard reports and also define and produce their own customized reports. See the **Business Objects Reports** section below for complete details.

Item Reports

When producing a predefined report from the **Items** list or the **Search** results list, the report output can be a printout or an exported file that is either in text format or Excel format. The items will be printed or exported with the fields that have been predefined in the report. See the **Defining a Report** section below.

Reaching the Items List or the Search Results List

The Items List


Select the **Cataloging** section from the main menu. Select the **Items** option from the **Cataloging** menu. The **Items** list will be displayed.

The Search Results List

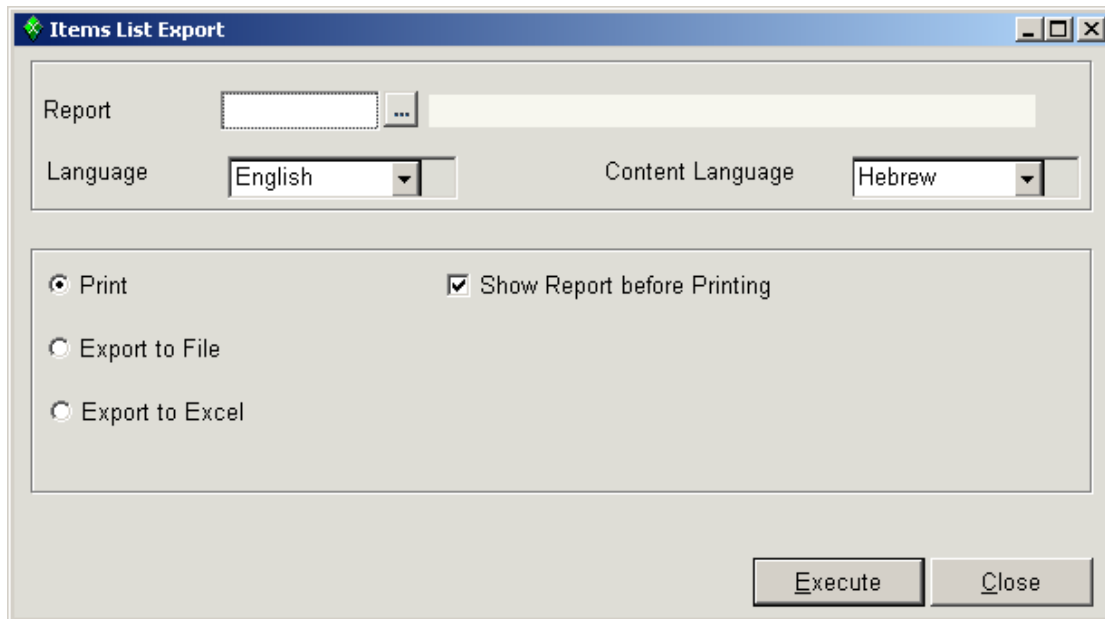
Select the **Search** section from the main menu. The search notebook will be displayed. Define the search query and run the search (see the **Search** chapter for complete details about defining and running search queries). The **Search** results list will be displayed.


Producing the Report – Step 1

Make sure the **Items** list or the **Search** results list is the active window. Select the

arrow next to the **Print** icon  on the secondary toolbar, and select the **Print**

Report icon . The **Items List Export** window will be displayed.



Fill in the **Report** field by selecting the  button and choosing the report format from the **Item Reports** list (see the **Defining a Report** section below for details about defining report formats).

Select the language to be used in the report from the **Language** drop down menu.

Select the content language from the **Content Language** drop down menu. The menu includes languages defined in the system. Thus in the example above, the report headers will be in English and the content of the items will be in Hebrew.

The rest of the options in the **Items List Export** window are used to determine how the report is produced: as a printed report or as an exported file.


Producing the Report – Step 2: Printing the Report

Select the **Print** option.

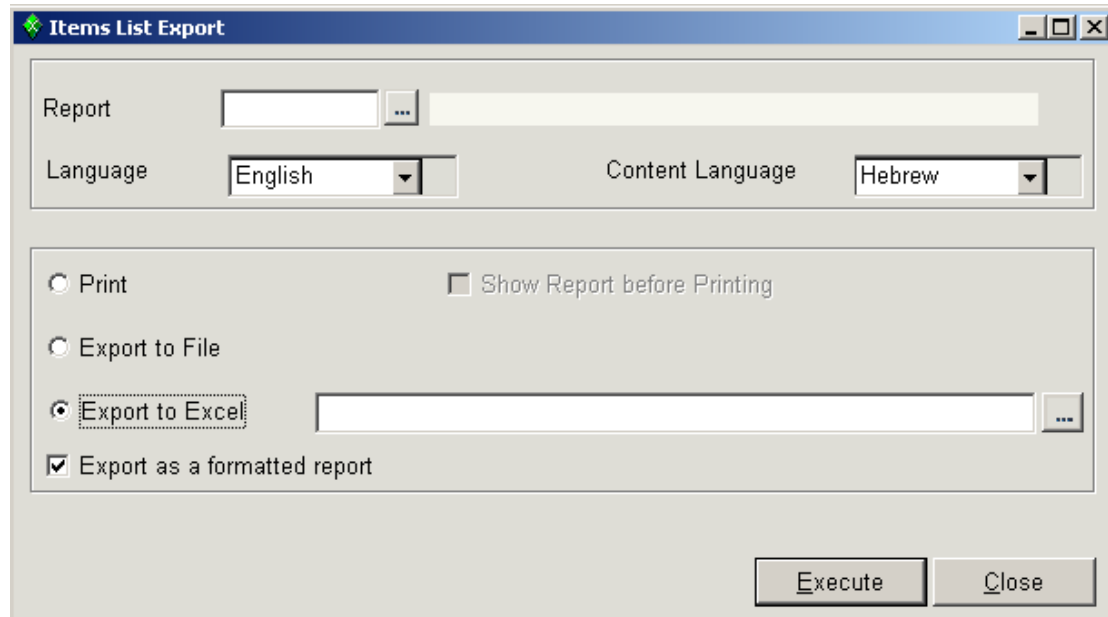
Mark the **Show Report Before Printing** checkbox in order to preview the report on the screen.

Select **Execute**. A prompt will be displayed with the number of items that will be printed. Select **Yes**. The results will be printed.

Producing the Report – Step 2: Exporting the Report to a File

Select the **Export to File** option or the **Export to Excel** option. A line will be opened for the file name. Type in the path and file name or select the  button and select the path and/or file from the list.

When selecting the **Export to Excel** option, the **Export as a formatted report** checkbox will be displayed. Mark the checkbox to produce a formatted report. A formatted report will maintain the collected fields structure. In addition, images will be exported to Excel, if so defined in the report definition.

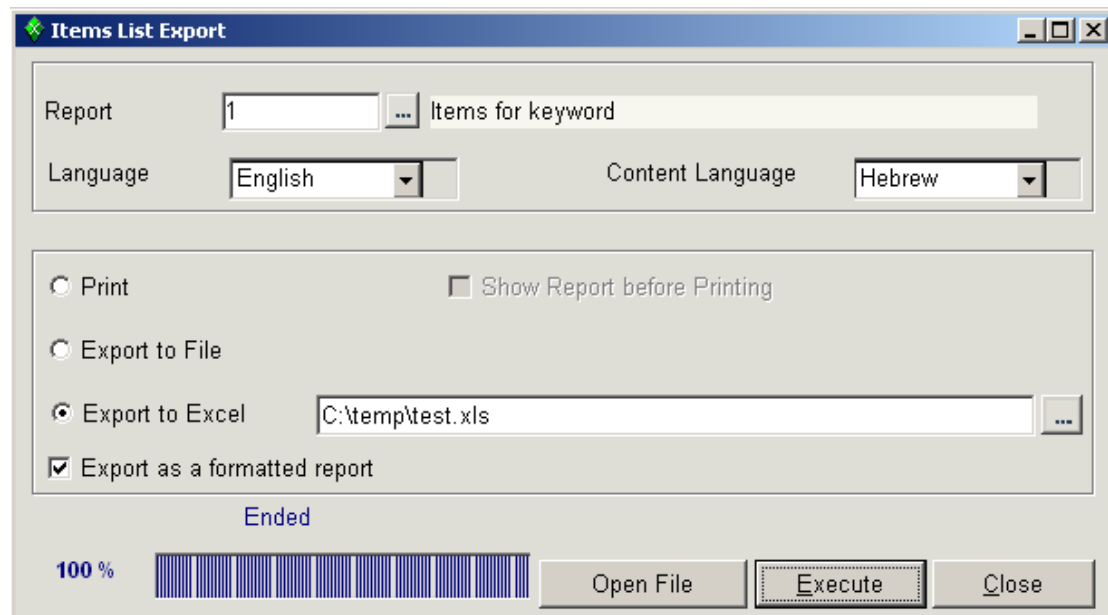


The screenshot shows the 'Items List Export' dialog box. At the top, there's a title bar with a green diamond icon and the text 'Items List Export'. Below the title bar, there are several input fields and controls:

- Report:** A text box containing an empty field followed by a browse button (three dots).
- Language:** A dropdown menu currently showing 'English'.
- Content Language:** A dropdown menu currently showing 'Hebrew'.
- Print:** A radio button that is not selected.
- Show Report before Printing:** A checkbox that is not checked.
- Export to File:** A radio button that is not selected.
- Export to Excel:** A radio button that is selected.
- Export as a formatted report:** A checkbox that is checked.
- File Path:** A text box next to the 'Export to Excel' option, currently empty, with a browse button (three dots).
- Buttons:** 'Execute' and 'Close' buttons are located at the bottom right.

Select **Execute**. A prompt will be displayed with the number of items that will be exported. Select **Yes**. The results will be exported to the file.

While the report is being produced a **Cancel Export** button can be selected to stop generating the report.



This screenshot shows the 'Items List Export' dialog box after the 'Execute' button has been pressed. The state is as follows:

- Report:** The text box now contains the number '1', and the file name field contains 'Items for keyword'.
- Language:** Still set to 'English'.
- Content Language:** Still set to 'Hebrew'.
- Print:** Radio button not selected.
- Show Report before Printing:** Checkbox not checked.
- Export to File:** Radio button not selected.
- Export to Excel:** Radio button selected.
- Export as a formatted report:** Checkbox checked.
- File Path:** The text box now contains 'C:\temp\test.xls'.
- Progress Bar:** Located at the bottom left, it shows '100%' completion.
- Buttons:** 'Open File', 'Execute' (highlighted with a dotted border), and 'Close' buttons are at the bottom right.

Once there is an indication on the **Items List Report** window that the export has been successfully completed, the **Open File** button can be selected to view and edit the report.

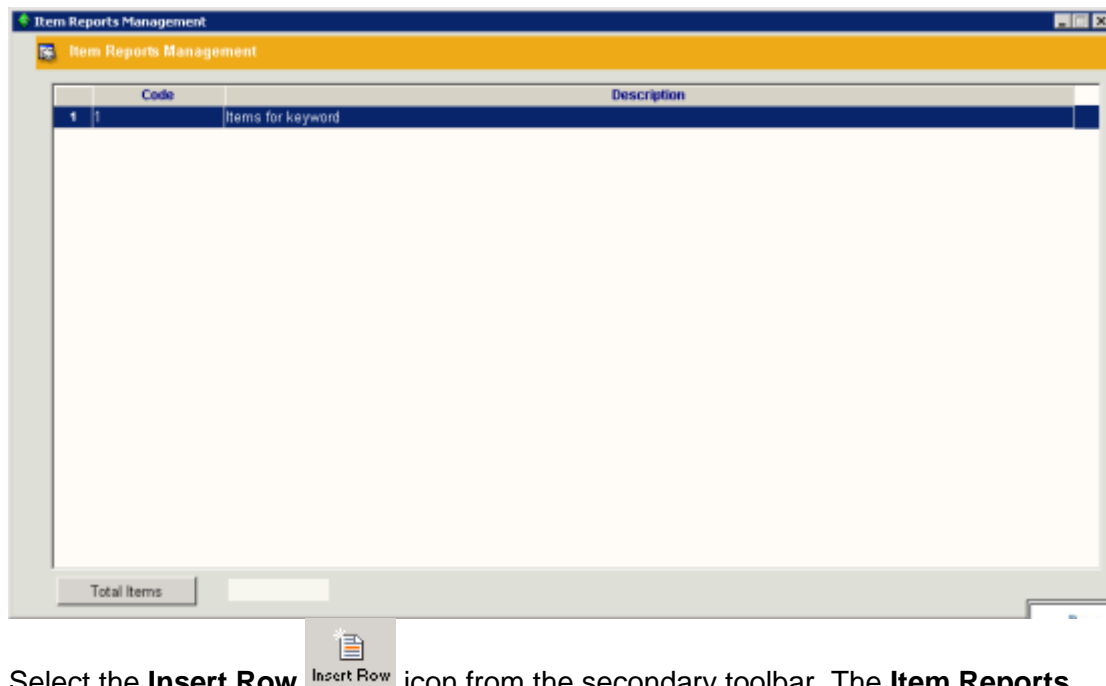
Select **Close** to close the window.


Note: The default path and file name for the export files is defined in **Maintenance / Configuration File / Item Reports Management**.

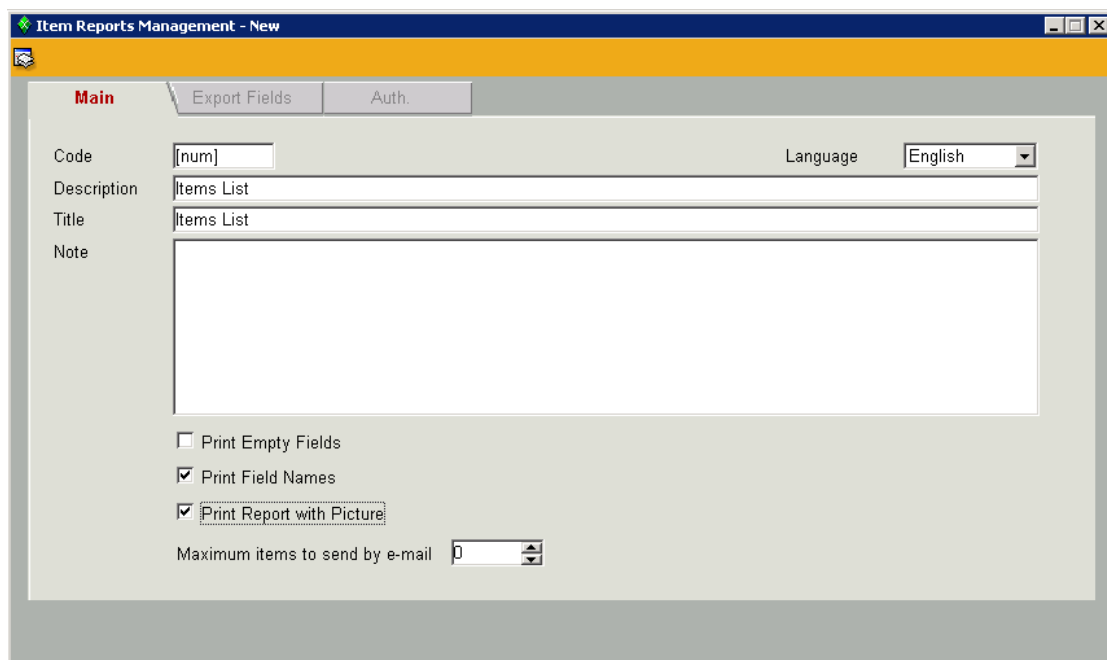
Defining a Report

New reports are added and existing reports are updated in **Reports / Item Reports Management**.


Select the **Reports** section from the main menu. Select the **Item Reports Management** option from the **Reports** menu. The **Item Reports Management** list will be displayed.



Select the **Insert Row**  icon from the secondary toolbar. The **Item Reports Management – New** notebook will be displayed. The **Main** tab will be the active tab.



Main Tab

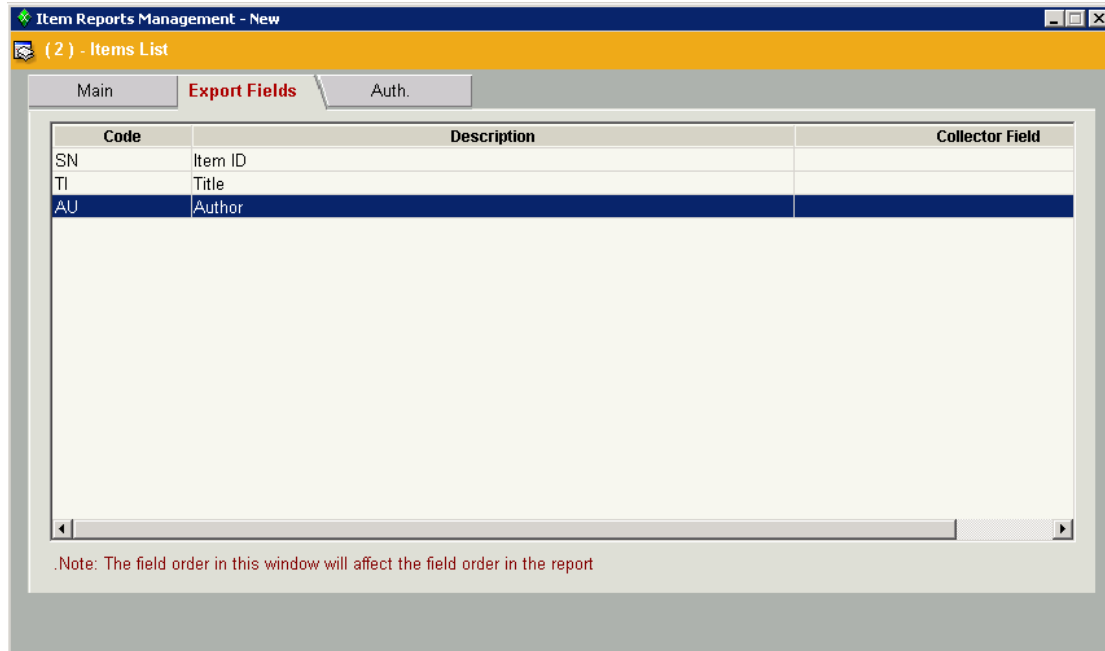
Fill in the fields in the **Main** tab and save by selecting the **Save** icon  from the secondary menu or by typing **Ctrl + S**.

Code	The Code field is a report ID. The field's default value is <i>[num]</i> . This value is used to automatically allocate a report ID number by the system. If you prefer to manually ascribe a descriptive alphanumeric code, highlight the value <i>[num]</i> and type or scan the desired code. The code will be allocated upon saving the report.
Description	Free text. The name of the report as it appears in the reports list. This field is mandatory.
Title	Free text. The title as it appears in the printed report. This field is mandatory.
Note	Free text.
Language	Select the report language from the list. This option is only available in the multilingual module.
Print Empty Fields	When this checkbox is selected, all fields will be printed, regardless of whether or not they have values.
Print Field Names	When this checkbox is selected, the name of each field will be printed next to the field's value.
Print Report with Picture	When this checkbox is selected, image files that are linked to the item will be printed.
Maximum Items to Send by E-mail	0 – This report cannot be sent by e-mail. No items will be sent. Any number larger than 0 – the number of items that will be sent from the Items list in each e-mail message. For example, if the report query returns twenty items and the number entered is 5, only the first five items will be sent by e-mail. This is to avoid large e-mails.

After saving the details, the **Export Fields** tab will become active (not gray).

Export Fields Tab

Select the **Export Fields** tab. The **Export Fields** list is displayed. The fields: **Title** and **Item ID** are included in all reports, and therefore will already be in the list.



In order to enter the fields that will be exported to the report, select the **Insert Row**




icon from the secondary toolbar. The **Field List** window will be displayed.

Highlight a field and click **Select**. The field will be added to the **Export Fields** list. Repeat for all the fields that are to be included in the report.

In order to simultaneously add a number of fields to the **Export Fields** list, mark the **Select Group** checkbox in the **Field List** window. An additional list will be opened on the lower part of the screen. Highlight a field and select the down arrow. The field will appear on both the upper window and the lower window. Repeat for all the fields that are to be added to the **Export Fields** list and click **Select**.

The order of the fields in the list determines their order in the report. Field lines can be added either below any field line or above the first field line. In order to add

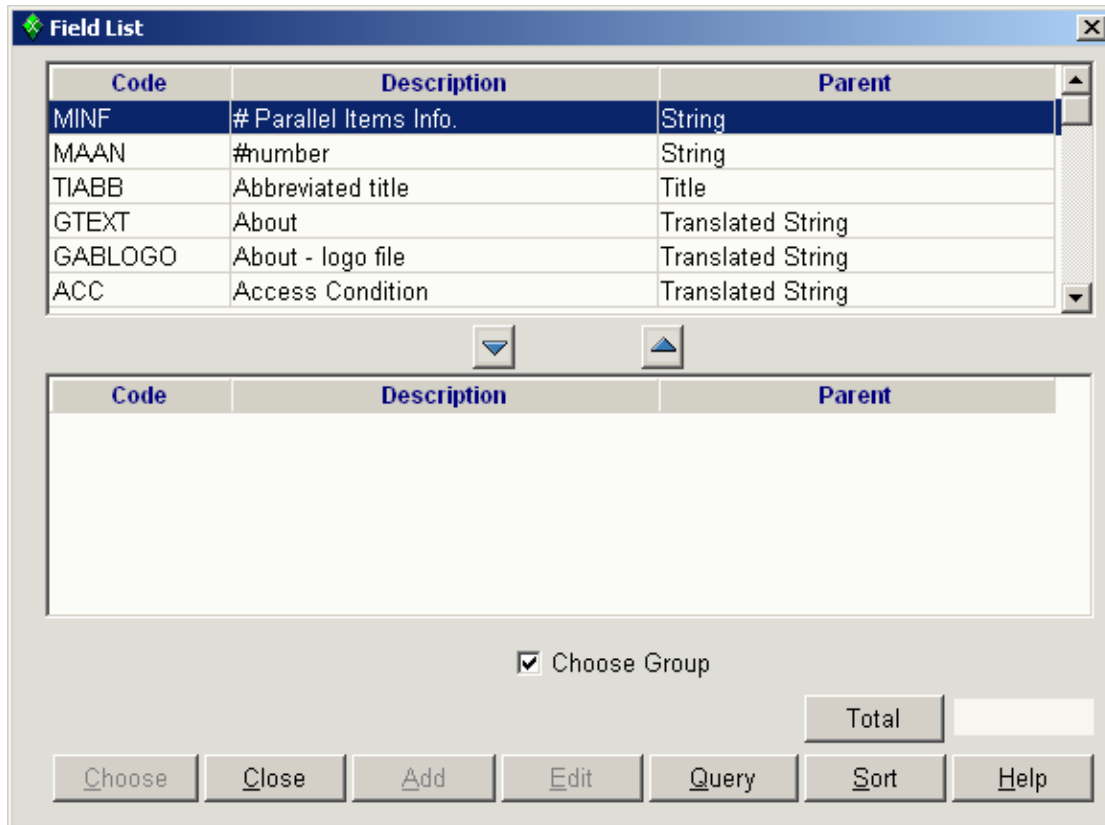
fields below a field line, highlight the line and select the **Insert Row**  icon from the secondary toolbar. Once the field is chosen from the **Field List** window, it will be inserted below the highlighted line.

When the first field line is highlighted, upon choosing a field from the **Field List** window a prompt will be displayed, asking whether the line should be inserted above the first line.

Note: When a collector field is added to the **Field List**, all the fields collected under it will appear too. They can be erased manually. Highlight the field to be

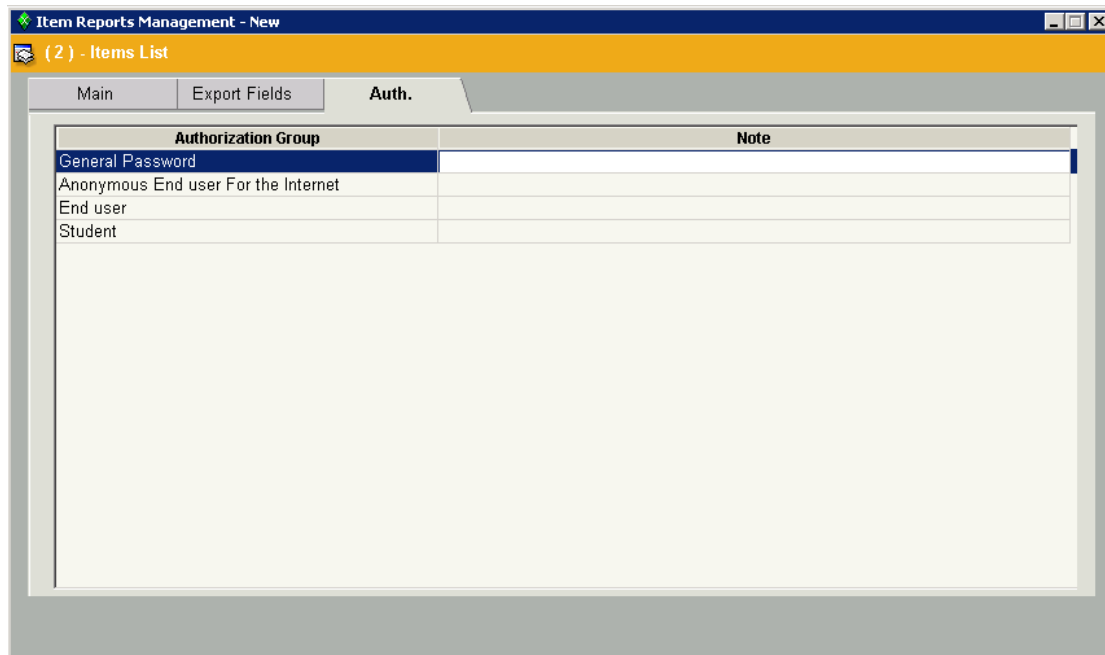
erased and select the **Delete Row** icon  from the secondary toolbar. The field will be deleted

The field list can be sorted by double clicking the header of a column.



Auth. Tab

In this tab select the authorization groups that will be able to generate this report.



Business Objects Reports

IDEA@ALM is supplied with a report generator by **Business Objects** and a standard set of reports, which suits most of the needs of a standard library user. The reports were defined based on the IDEA@ALM sections, and are arranged for easy access in a folder tree.

For a detailed explanation see the user manual supplied with the Business Objects software. After acquiring a basic understanding of the software, the user can create reports or tailor existing reports in order to suit the institution's needs.


It is not recommended to change the standard reports, which are periodically updated by IDEA according to the changes in the IDEA@ALM software. Instead, copy the standard reports into a separate folder and then change and rename them. A user can open existing reports, change their format or content, add or delete report fields, or change the criteria used for extracting information.

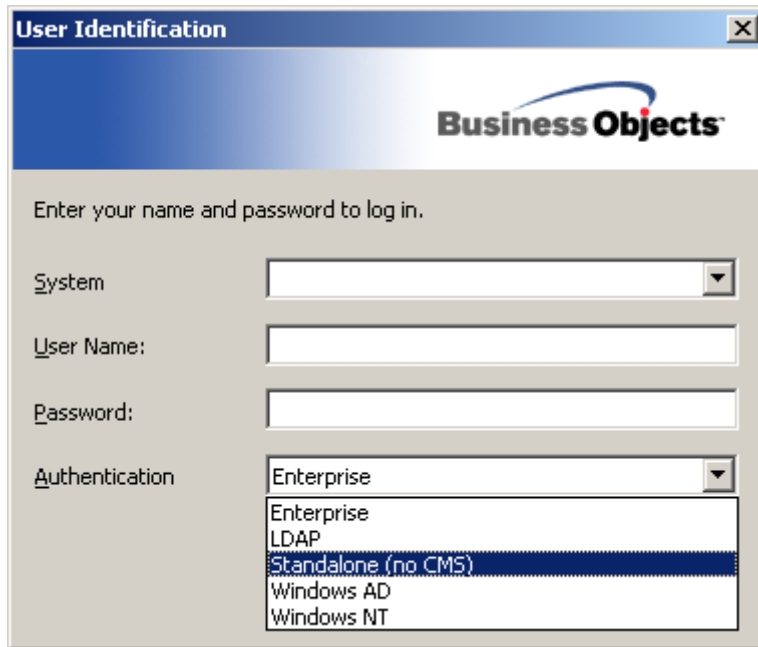
Note: When using an existing report to create a new report, make sure to save the new report under another name, using the **Save As** command. Otherwise the original report will be overwritten.

Using Business Objects for Generating Reports

New reports are added and existing reports are updated in **Reports / Item Reports Management**.

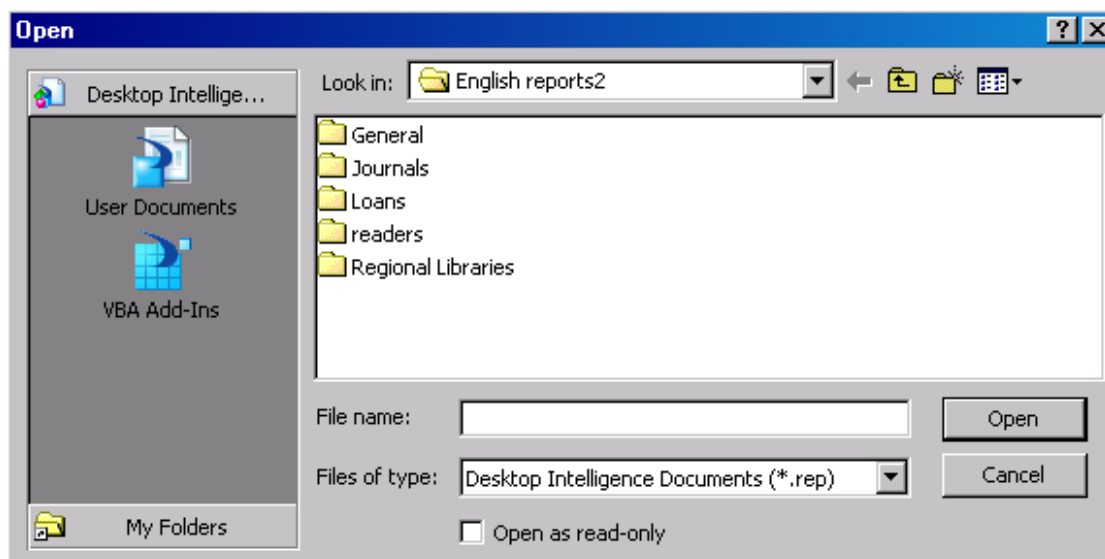
The report generator is activated from IDEA@ALM in **Reports / Reports**

Generator (or by selecting the **Reports** icon  from the main toolbar). The Business Objects **User Identification** window will be displayed:



Select the **Standalone (no CMS)** option, which enables use of the report generator without using a password.

Open an existing report by selecting **File / Open** from the menu bar, or by selecting the yellow folder icon  from the toolbar. The **Open** window will be displayed:



The window displays the list of report folders that were installed by IDEA.

Select a report and select **Open**. For some reports, a prompt for the report dates, and/or for additional values will be displayed.

Dates

The **Date** window will be displayed for all reports that require dates. Type in the date/s, or select **Values** and select the date/s from a list. Select **OK** and the report will be produced.

It is preferable to select the dates from a list, because this ensures that the date format will be correct.

When entering dates, enter the full date format with four digits for the year: *dd/mm/yyyy* or *mm/dd/yyyy* (for example, *29/03/1963* or *03/29/1963*).

When using a single date (for example, all the items that were cataloged on May 1st), enter the desired date and the following date. This is necessary because the date registered in the software includes hours and minutes. A single date will not include the full 24 hours.

Note that loans are an exception to this rule. For loans, a single date may be used.

Values

Some reports require the entry of values. The values are entered in the **Enter or Select Values** window by typing free text, or choosing from a list. Multiple values must be separated by a semicolon (;).

Select **Values** to choose from a list. A list of values will be displayed. Select one or more values from the list. Use **Ctrl+Shift** to select consecutive values from the list, or **Ctrl** to select multiple values from the list. Select **OK** and the report will be produced.

In the following example, a readers report is created for all the readers that are included in the Celebrities group and/or in the Management group.

