

# **A Reporting Framework for Verde**

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- Description of the problem
- A powerful tool: OpenReports
- Installation of OpenReports
- Use of OpenReports
- Some screen dups
- Some information to the SQL-Statements
- Documentation and further work

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## What we need

- Configuration of our own reports for weekly/monthly/yearly based work
- Easy to use for librarians via Web
- With privilege management system to control access – not all of the data should be seen by everybody

## Verde has some report functions

- Selecting and storing a Report Question is complicated
- The result has a lot of output and needs filtering afterwards
- Some reports are not available, there is no tool to create custom reports

## Some additional wishes

- The Verde database is difficult to understand, so good report functions should be shareable with the community (reuse)

## The solution: OpenReports

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- ❖ OpenReports is open source software based on the JasperReports reporting engine, both written in Java
- ❖ Can be installed on the Verde-Server or a separate one, if the Verde database is accessible via IP and JDBC
- ❖ Web-Interface for all purposes
- ❖ Access control and user privileges management, you can create groups
- ❖ You can schedule longer reports to run over night
- ❖ You can create your own output template for a report (not tested yet)
- ❖ E-mail notificaton
- ❖ Create parameter list form VERDE, i.e. list of librarrys, list of packages
  
- ❖ No modification of the Verde database is necessary
  - ✓ But we create a separate read-only account as a security feature
  - ✓ We built four stored functions in the VERDE database to create reports with title, issn, isbn and type much easier

## Installation: What your System Admin has to do

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- ❖ Install the Software; OpenReports needs a database. This could be ORACLE or any other DB of your choice (recommended MySQL)
- ❖ Create a Verde read-only user as a security feature
- ❖ Install the stored procedure as a helper function
- ❖ Configure the Software for your VERDE system
- ❖ Create Accounts and groups in OpenReports
- ❖ Install/copy our initial reports in the system; some modifications are necessary for your environment
- ❖ Add this reports to one (ore more) of your groups

⇒ This work will be described in a step by step guide available via ElCommons

## What you can do

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- Use the reports ;-)
- With SQL-Knowledge and a look in the VERDE Database
  - Change the reports via the admin tool of OpenReport for your own purpose
  - Create additional reports that you need
- Exchange your reports via EI Commons – we will describe in our documentation how to do this

# Screenshots of the Administration Interface



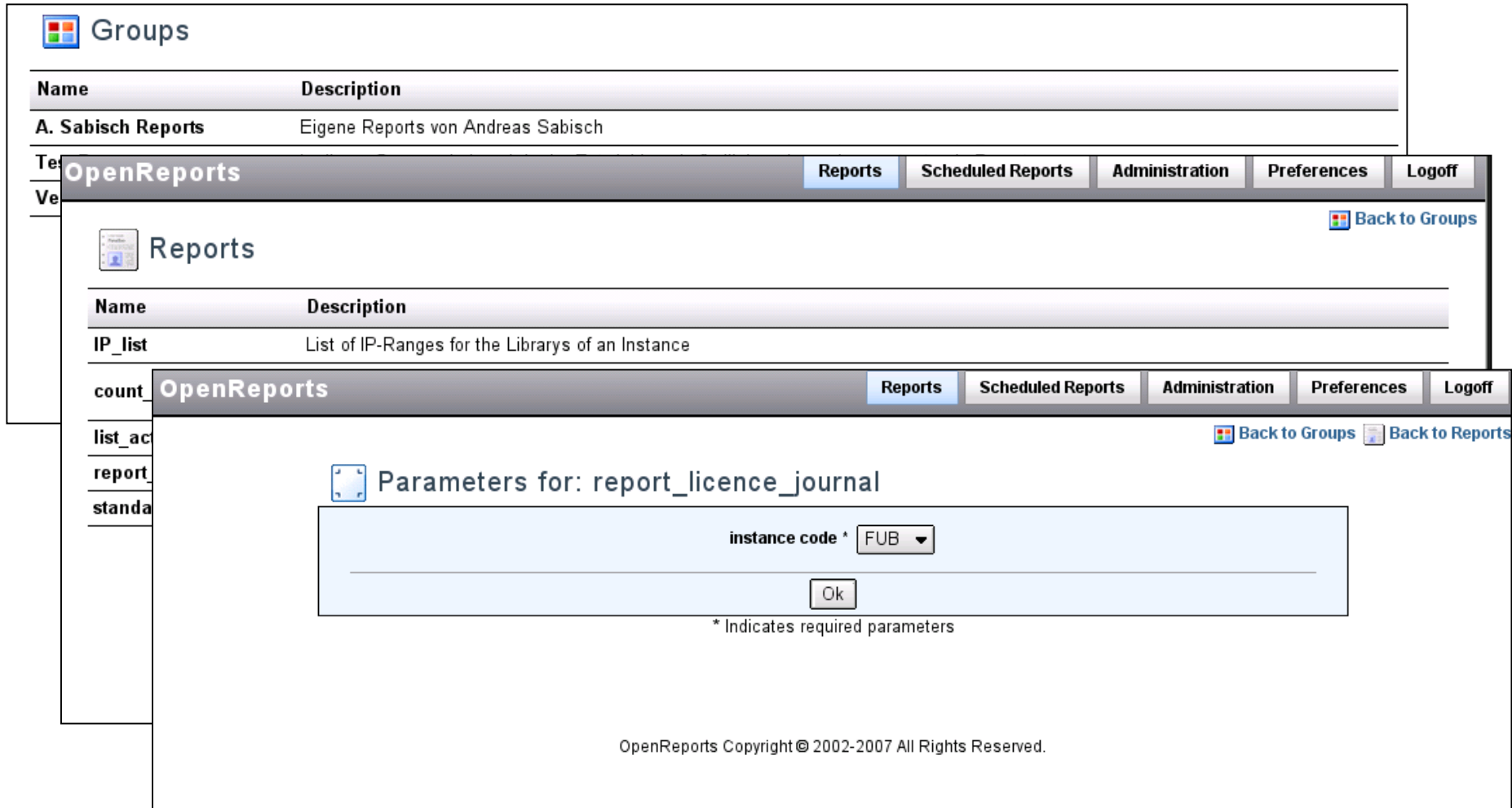
Selected User: asabisch

### Report Administration

- Charts**  
Add or Modify Charts.
- DataSources**  
Add or Modify DataSources.
- Reports**  
Add or Modify Reports, Upload Report Templates, Assign Reports to Groups
- Report Parameters**  
Add or Modify Report Parameters.

<b>Name</b>	<input type="text" value="asabisch"/>
<b>Tags</b>	<input type="text" value="Sabisch,Andreas"/>
<b>Password</b>	<input type="password" value="....."/>
<b>Confirm Password</b>	<input type="password" value="....."/>
<b>External ID</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>
<b>Dashboard Report</b>	<input type="text" value="(None)"/>
<b>Roles</b>	<input checked="" type="checkbox"/> Advanced Scheduler <input checked="" type="checkbox"/> Chart Admin <input checked="" type="checkbox"/> DataSource Admin <input checked="" type="checkbox"/> File Uploader <input checked="" type="checkbox"/> Group Admin <input checked="" type="checkbox"/> Log Viewer <input checked="" type="checkbox"/> Parameter Admin <input checked="" type="checkbox"/> Report Admin <input checked="" type="checkbox"/> Root Admin <input checked="" type="checkbox"/> Scheduler
<b>Groups</b>	<input checked="" type="checkbox"/> A. Sabisch Reports <input checked="" type="checkbox"/> Test Reports <input checked="" type="checkbox"/> Verde

# Screenshot of a report



The screenshot shows the OpenReports web interface. At the top, there is a 'Groups' section with a table:

Name	Description
A. Sabisch Reports	Eigene Reports von Andreas Sabisch

Below this is a navigation bar for 'OpenReports' with tabs: Reports, Scheduled Reports, Administration, Preferences, and Logoff. A 'Back to Groups' link is visible.

The 'Reports' section contains a table:

Name	Description
IP_list	List of IP-Ranges for the Libraries of an Instance

Below this is another navigation bar for 'OpenReports' with tabs: Reports, Scheduled Reports, Administration, Preferences, and Logoff. There are two 'Back to Groups' and one 'Back to Reports' link.

A dialog box titled 'Parameters for: report\_licence\_journal' is open, showing a required parameter 'instance code' with a dropdown menu set to 'FUB'. An 'Ok' button is at the bottom of the dialog.


\* Indicates required parameters

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# The resultlist with export options



 list\_active\_packages

16 items found, displaying all items.1

Title	Eproductcode
Cambridge University Press Archive	LEP_1245335489102_12
EBSCOhost Electronic Journals Service	CEP_1123334174618_61183
EDP Sciences	CEP_1123334190256_61287
Elsevier Scopus	CEP_1210826507421_10896
HBZ_BECK	CEP_1154954843433_329
Heldermann Verlag	CEP_1123334179206_61218
Highwire Press Oxford University Press	CEP_1123334190975_61292
Human Kinetics	CEP_1123334169703_61147
Ingenta Connect American Sociological Association	CEP_1123334191434_61295
Ingenta Connect Berg Publishers	CEP_1123334184790_61246
Ingenta Connect MIT Press	CEP_1123334173698_61176
Ingenta Connect Psychonomic Society Press	CEP_1123334173953_61178
Legios Bibliothek Recht Steuern	CEP_1202133691173_35347
Metapress Taylor & Francis	CEP_1123334177242_61203
Metapress Taylor & Francis Health Sciences	CEP_1123334191307_61294
Ovid CINAHL	CEP_1123334192394_61303

Export options: **CSV** | **Excel** | **PDF**  
Schedule Report: **CSV** | **Excel** | **PDF**

# Admin a report

OpenReports Reports Scheduled Reports **Administration** Preferences Logoff

[Back to Reports](#)


**Report Definition** Report Parameters


**Name**


**Description**


**Tags**


**DataSource**


**Query** 

**Chart** 

**Report Template** 

**Hidden** 

**Use Virtualization** 

**Export Types**   PDF  HTML  CSV  XLS  RTF  TEXT  EXCEL  IMAGE

## A typical SQL-Statement

```
select oreports.MARXML_TITLE(marcxml) as title,  
       EPRODUCT.eproductcode  
FROM VERDE.EPRODUCT, VERDE.WORKEXPRESSION  
WHERE  
      (EPRODUCT.G_WORKEXPRESSIONCODE=WORKEXPRESSION.  
      WORKEXP CODE  
AND EPRODUCT.G_EPRODUCTSTATUS='PROD' AND  
      EPRODUCT.EPRODUCTTYPE='PA' AND  
      EPRODUCT.ER_FREEORSUBSCRIPTION!='FREE' AND  
      EPRODUCT.INSTANCECODE=$P{instanceCode} AND  
      WORKEXPRESSION.INSTANCECODE=$P{instanceCode} )  
order by title
```

→ To make your own SQL statements have a look at the 'VERDE ERD Description' document available in the ExLibris' documentation portal

## Conclusions

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- OpenReport is a powerful tool to create your own reports
- To administer a report, you need SQL-knowledge and a look at the VERDE database
- Your VERDE staff can create a report once and easily reuse it over and over again
- We have not described and tested the whole system – don't hesitate to do so, though
- Our documentation will provide you with an easy access to this tool
- We share our first reports not only as a demonstration, but as a (hopefully) helpful tool – create your own and share them with all Verde-customers



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