A Reporting Framework for Verde

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IGELU Helsinki 2009
A Reporting Framework for Verde

- 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
Reports with Verde

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

- 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 overnight
- You can create your own output template for a report (not tested yet)
- E-mail notification
- Create parameter list form VERDE, i.e. list of libraries, 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

- 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

- 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 El Commons – we will describe in our documentation how to do this
### Screenshots of the Administration Interface

#### Selected User: asabisch

<table>
<thead>
<tr>
<th>Name</th>
<th>asabisch</th>
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<tbody>
<tr>
<td>Tags</td>
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</tr>
<tr>
<td>Confirm Password</td>
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<td>Dashboard Report</td>
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<tr>
<td>Roles</td>
<td></td>
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<td>Groups</td>
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</table>

- Advanced Scheduler
- Chart Admin
- DataSource Admin
- File Uploader
- Group Admin
- Log Viewer
- Parameter Admin
- Report Admin
- Root Admin
- Scheduler
- A. Sabisch Reports
- Test Reports
- Verde

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The result list with export options

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Export options: CSV | Excel | PDF
Schedule Report CSV | Excel | PDF
A typical SQL-Statement

```sql
select oreports.MARCXML_TITLE(marcxml) as title,
       EPRODUCT.eproductcode
FROM VERDE.EPRODUCT, VERDE.WORKEXPRESSION
WHERE
  (EPRODUCT.G_WORKEXPRESSIONCODE=WORKEXPRESSION.WORKEXPCODE
AND EPRODUCT.G_EPRODUCTSTATUS='PROD' AND
  EPRODUCT.EPRODUCTTYPE='PA' AND
  EPRODUCT.ER_FREEORSUBSCRIPTION!='FREE' AND
  EPRODUCT.INSTANCECODE=${instanceCode} AND
  WORKEXPRESSION.INSTANCECODE=${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

- 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
Work in progress ...

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