Crystal Reports and Circulation Workflow

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Need

- Canned ALEPH reports don’t meet all requirements
- Wanted Web-accessible, “self-service” reports wherever possible
- Need reports to facilitate interaction with external systems, services
Advantages

- Accessible to all staff, one URL location for all reports
- 30 circulation reports available
  - http://crystalrep.bc.edu/CrystalReports/
- Results retrieved in real time from production server
- Easy to create for temporary work-arounds
A Closer Look

- Find Patron Aleph ID and Name by Email Name
- View Hold Requests for Items which are "On Order" or "In Process"
- Expired Patron Records with Active Loans
- Overdue Items by Due Date Report (Reserves and Other Library Collections)
- Count of Loans/Renewals by Patron Status and Type
- Find Courses to which a Given Item is Attached (Reserves)
Hardware/Software Requirements

• Hardware
  - Client Computer (running IE5+)
  - Webserver running IIS5 (small NT server)
  - Database server running Oracle8+ (ALEPH server)

• Software
  - Crystal Reports 8 – Developer Edition
  - Oracle Client installed on Webserver (ODBC and SQL+)
  - HTML/Text Editor
Staff Requirements

- All BC reports were developed by our Systems Librarian (Kevin Kidd)
- Initial setup of reporting program (server and software installation and configuration) took approx. 1 week
- Bulk of reports available (70+) developed over 2-3 month period
- Time required to develop additional reports, maintain existing reports is minimal
1. Web browser sends URL with .RPT file
2. Crystal Reports Web Component Server extension recognizes .RPT file type and runs report against database
3. Web server sends formatted report back to browser in Report Viewer
Contact Information:

- For technical details (e.g., copy of queries, explanation of BC setup):
  - Kevin Kidd (kiddk@bc.edu)
- Further information on circulation reports, workflow
  - Margie Fiels (fiels@bc.edu)
Questions?