



# EVERGREEN SIMPLE REPORTS

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Set Up and Run Common  
Reports About Your  
Collection and Services



# Today's Objectives

## **At the end of the session, you'll know**

- The essentials of report data points
- How to choose filters and operators
- How to save your report
- How to run it now and in the future
- How to retrieve the output to see the information

# SIMPLE REPORTS

Build a report that you can run right away. Use that report to create and run other reports by simply adjusting the filters and name of the report.

Ideal for common reports

- Weeding
- Shelflists
- Simple circulation

<input type="checkbox"/>	#	Report Name	Date Created	Last Edited	Last Run
		Filter ▾	Filter ▾		
<input type="checkbox"/>	1	Patrons without emails	6/20/23, 2:56 PM	6/20/23, 3:00 PM	6/20/23, 4:16 PM
<input checked="" type="checkbox"/>	2	BRI J Circ 2022 By Month	6/20/23, 2:55 PM	6/20/23, 2:55 PM	6/20/23, 4:14 PM
<input type="checkbox"/>	3	JNF Weeding	6/20/23, 2:40 PM	6/20/23, 2:43 PM	6/20/23, 2:44 PM
<input type="checkbox"/>	4	Audiobook Weeding	6/20/23, 2:26 PM	6/20/23, 2:39 PM	6/20/23, 2:40 PM
<input type="checkbox"/>	5	Audiobook Shelflist	6/20/23, 2:24 PM	6/20/23, 2:24 PM	6/20/23, 2:25 PM
<input type="checkbox"/>	6	JNF Shelflist	6/20/23, 2:15 PM	6/20/23, 2:23 PM	6/20/23, 2:24 PM

The Reporter is still available for more complex reports

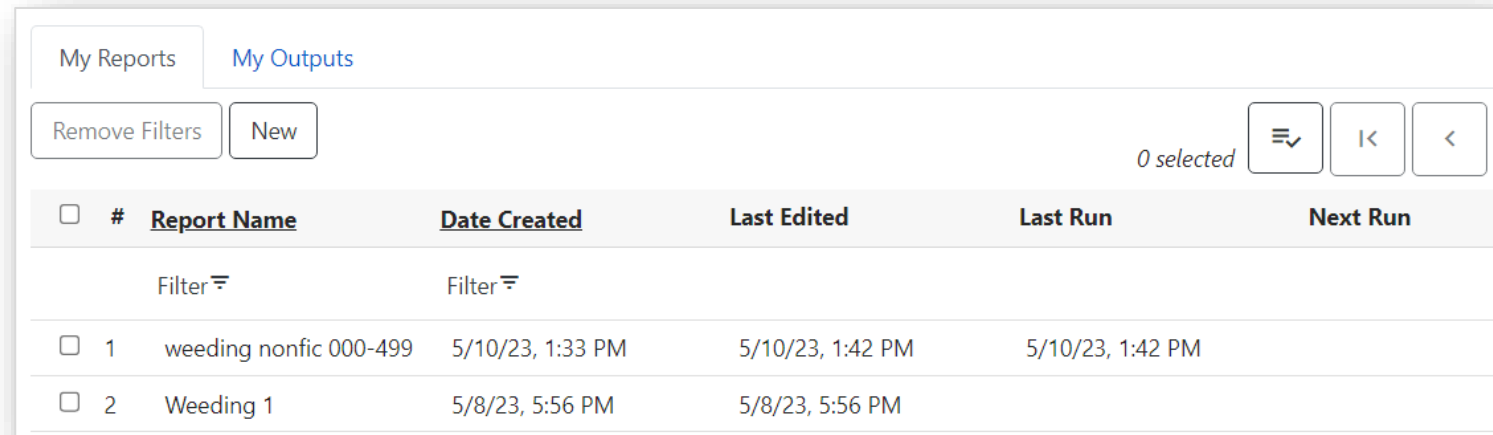
# SIMPLE REPORTS Start

Administration > Simple Reports

- My Reports
- My outputs

List display allows you to

- Sort
- Filter



The screenshot shows a web interface for 'My Reports'. At the top, there are tabs for 'My Reports' and 'My Outputs'. Below the tabs are buttons for 'Remove Filters' and 'New'. On the right side, there is a '0 selected' indicator and three navigation buttons: a menu icon, a double left arrow, and a single left arrow. The main content is a table with the following columns: #, Report Name, Date Created, Last Edited, Last Run, and Next Run. The table has two rows of data.

<input type="checkbox"/>	#	Report Name	Date Created	Last Edited	Last Run	Next Run
<input type="checkbox"/>	1	weeding nonfic 000-499	5/10/23, 1:33 PM	5/10/23, 1:42 PM	5/10/23, 1:42 PM	
<input type="checkbox"/>	2	Weeding 1	5/8/23, 5:56 PM	5/8/23, 5:56 PM		

Simple implies moderate previous learning exists

# Essential Steps

1. Click New
2. Choose a report type and name
3. Choose fields and output order
4. Add and set up filters: field, operator, transform
5. Set up output options
6. Save and Schedule Report or Save the template without running it

# Report Setup

1. My Reports > New
2. Choose a report type
  - **Circulation** generally, statistical counts, not item detail
  - **Collection** detailed lists of items or titles
  - **Weeding** weeding lists and collection maintenance
  - **Patrons** counts or lists associated with patrons
  - **Billings and Payments Transaction Summary** monetary transactions
3. From any report, click Close to return to the list.

The screenshot shows the 'My Reports' interface. At the top, there are tabs for 'My Reports' and 'My Outputs'. Below the tabs are buttons for 'Remove Filters' and 'New'. On the right, it says '0 selected' and has navigation icons. The main area is a table with columns: #, Report Name, Date Created, Last Edited, Last Run, and Next Run. There are two rows of data. Below the table, a dropdown menu is open, showing options: 'Please Select a Report Type', 'Circulation', 'Collections', 'Weeding', 'Patrons', and 'Billings and Payments Transaction Summary'. The 'Weeding' option is highlighted.

#	Report Name	Date Created	Last Edited	Last Run	Next Run
1	weeding nonfic 000-499	5/10/23, 1:33 PM	5/10/23, 1:42 PM	5/10/23, 1:42 PM	
2	Weeding 1	5/8/			

The screenshot shows the 'Edit Simple Report' form. It has a title bar 'Edit Simple Report'. Below the title bar, there are two input fields: 'Report Type' with a dropdown menu showing 'Weeding' and 'Report Name' with a text input field containing 'weeding-JNF'. To the right of these fields are two buttons: 'Save' and 'Close'. The 'Close' button is circled in red.

# Display Fields Tab

1. Select a Field Category at the left
  - *Common fields* lists most of the fields needed for a report type
  - Other categories list additional field choices
2. Select a field. It will display on the right.
  - You can add fields in the order that you want them to display or add them and then reorder them
  - The order here doesn't affect the output order
3. Repeat for each field that you want to include

The screenshot shows the 'Display Fields' tab of a report configuration window. At the top, 'Report Type' is set to 'Collections' and 'Report Name' is 'Missing'. Below this are four tabs: 'Display Fields', 'Output Order', 'Filters', and 'Output Options'. The 'Display Fields' tab is active, showing a list of field categories on the left: 'Common Fields', 'Date Fields', 'Call Number and Title Fields', 'Libraries', and 'All Fields'. On the right, there is a 'Field Display Order' section which is currently empty.

The screenshot shows the 'Field Display Order' section with three fields listed. Each field has a 'Name' input field, a 'Transform' dropdown menu, and up/down arrow buttons for reordering.

	Name	Transform	
⊖	Shelving Location	Raw Data	↑ ↓
⊖	Call Number Label	Raw Data	↑ ↓
⊖	Author	Raw Data	↑ ↓

See next slides for important information about data fields

# Geeky But Important

In Evergreen (and other databases), IDs identify specific records in the database. These can be an

- Item ID
- Patron ID
- Transaction ID
- Shelving Location ID
- Bill ID
- Etc.

**Be sure to add item and/or patron *barcode* fields in weeding, collections, or patron lists.**

They are usually only added to a report to count things.

*Call Number Label* displays your local call number; *Full Call Number* displays the Bib record call number



# A Word About Dates

There are several ways to display dates for common Evergreen data points: Create, Active, Last Circulated, Edited, Status Change, etc. Check the Dates Category for all options

Field Name	Output	Sample
Date / Time	Timestamp	6/10/2022 2:11 PM
Date	MM/DD/YYYY	6/10/2022
Year and Month	YYYY-MM	2022-06
Year	YYYY	2022
Days/Months/Years Ago	#	392/13/1

# Choose a Field Transform

1. Use the dropdown to choose a field transform that will show how you want the data to display, and in some instances, function. Most fields use *Raw Data*.  
**\*\*See next slides for details\*\***
2. Repeat for each field

The screenshot displays the 'Field Display Order' configuration window. It contains a table with the following structure:

Name	Transform	Order
Shelving Location	Raw Data	1
Call Number Label	Raw Data	2
Author	Raw Data	3
Title	Raw Data	4
	Raw Data	5
	Date	6

The 'Transform' dropdown menu is open for the first row, showing the following options:

- Raw Data
- Upper Case
- Lower Case
- Substring
- First Value
- Last Value
- Minimum Value
- Maximum Value
- Count

# Field Transforms

A *Field Transform* tells the report how to process a field for output.

- *Raw Data* displays a field exactly as it appears in the database. Most fields use the *Raw Data* transform, e.g.
  - Call Number Label = a call number
  - Owning Library Short (Policy) Name = 3-letter code
  - Owning Library Name = the full library name
  - Item Create Date/Time = timestamp
  - Item Create Date = MM/DD/YYYY
  - Item Create Year = YYYY

The available transform options depend on the data type, for instance, text, money, ID, or timestamp.

The screenshot displays a configuration interface for report fields. It consists of a table with two columns: 'Name' and 'Transform'. The 'Name' column contains text input boxes for 'Shelving Location', 'Call Number Label', 'Author', and 'Title'. The 'Transform' column contains dropdown menus, all of which are currently set to 'Raw Data'. A dropdown menu is open for the 'Title' field, showing a list of transform options: 'Raw Data', 'Upper Case', 'Lower Case', 'Substring', 'First Value', 'Last Value', 'Minimum Value', 'Maximum Value', and 'Count'. The 'Raw Data' option is highlighted in the dropdown.

Name	Transform
Shelving Location	Raw Data
Call Number Label	Raw Data
Author	Raw Data
Title	Raw Data
	Raw Data

- Transform
- Raw Data
- Upper Case
- Lower Case
- Substring
- First Value
- Last Value
- Minimum Value
- Maximum Value
- Count

# Other Common Field Transforms

- *Count* counts the total number of database records, e.g.
  - Patron barcodes = the number of barcodes a patron has had
  - Shelving locations = the number of shelving locations used
  - Circulation IDs = the number of circulations (usually in a month, year, etc.)
- *First Value* displays a field's earliest value e.g. a patron's original barcode number
- *Last Value* displays the most recent value e.g. a patron's current barcode, which is different if their card was replaced
- *Sum* and *Average* display a calculated numerical value e.g. total circulations in a month e.g. average circulations in a month

The image shows a screenshot of a data transformation interface. It consists of two rows of input fields, each with a 'Name' label and a 'Transform' dropdown menu.

The first row has a field named 'Shelving Location' with a dropdown menu showing options: Raw Data (selected), Upper Case, Lower Case, Substring, First Value, Last Value, Minimum Value, Maximum Value, and Count.

The second row has a field named 'Circulation ID' with a dropdown menu showing options: Raw Data, First Value, Last Value, Minimum Value, Maximum Value, Count, Sum (selected), and Average.

# Output Order Tab

- For each field, use the up/down arrows to determine the order of columns in your report from left to right
- Each column can be sorted independent of where it is on the table (optional)

Owning Library Short (Policy) Name	Shelving Location	Call Number Label	Author	Title	Barcode
BRI	Biography	B BROSH	Brosh, Allie.	Hyperbole and a half : unfortunate situations, flawed coping mechanisms, mayhem, and other things that happened	31036150664099
BRI	Fiction	FICTION	Goldsmith, Olivia.	Switcheroo : a novel	31036100259586
BRI	Fiction	FICTION HADDON	Haddon, Mark.	A spot of bother	31036150405220
			Shelley, Mary		

# Filters Tab

Choose and set up filters to limit to only the data you want to include – your library’s items or patrons, a specific shelving location or dates, etc. - in four steps

1. Add a Filter
2. Choose a Transform
3. Choose Filter value
4. Choose an Operator

Fields Selected for Display

Shelving Location, Call Number Label, Author, Title, Barcode, Last Circulated Date / Time, Circulation Total, Circulation Year To Date, Circulation Last Year, Circulation Two Years Ago, Item Status, Alert Message

Filter Fields and Values

⊖	Item Deleted?	Transform Raw Data	Filter value False
		Operator Equals	
⊖	Owning Library	Transform Raw Data	Filter value Library BRI <input type="checkbox"/> + Ancestors <input type="checkbox"/> + Descendants
		Operator Equals	
⊖	Shelving Location	Transform Raw Data	Filter value <Unset>
		Operator In List	Owned by WLS Include descendants? <input type="checkbox"/>
			Add
⊖	Last Circulated Date / Time	Transform Date	Filter value 2020-06-01
		Operator On or Before	
⊖	Create Date	Transform Raw Data	Filter value 2022-06-01
		Operator Less Than or Equal to	

# Add a Filter

1. Select a Filter Category at the left
2. Select a filter. It will display on the right. The order doesn't affect the way the filters work.
3. Repeat for each filter that you want to include

The screenshot shows a software interface with four tabs: 'Display Fields', 'Output Order', 'Filters', and 'Output Options'. The 'Filters' tab is active.

**Suggested Filters**

**Common Fields**

- Item ID
- Circulating Library
- Shelving Location
- Circulating System
- Owning Library
- Owning System

**Fields Selected for Display**

Shelving Location, Call Number Label, Author, Title, Barcode, Circulation Total, Circulation Last Year, Last Circulated Date, Create Date, Item Status, Alert Message

**Filter Fields and Values**

Field	Transform	Operator	Filter value	Options
Owning Library	Raw Data	Equals	Library	<input type="checkbox"/> + Ancestors <input type="checkbox"/> + Descendants
Shelving Location	Raw Data	Equals	Select...	

See next slides for important information about filters

# A Few Words About Filters

**Item Deleted? or Patron Deleted? Filters** are included in almost every report with an answer of Yes or No. For most -

- list reports, like weeding or item or patron lists, use ***Deleted? equals False***.
- count reports about your **current** collection, like Count Items By Shelving Location, use ***Deleted? equals False***.
- circulation count reports, like Count Circulation by Shelving Location, use ***Deleted? equals Both***.

**Date Filters** may vary from the display date field. For instance

- Annual Circ Count By Month uses the display field Year+Month and the Filter Year to report circulation each month in a year, 2021-01, 2021-02, 2021-03... in 2021



# Choose a Transform

1. In the Transform dropdown, confirm or change the Transform.
  - Most *filter* transforms match the *field* transforms that you chose.
  - Most use *Raw Data*.
2. Repeat for each filter.

The screenshot shows a 'Filter Fields and Values' interface with three filter rows. Each row has a collapse icon (⊖) on the left, a field name, and configuration options for Transform, Operator, and Filter value.

Field	Transform	Operator	Filter value
Owning Library	Raw Data	Equals	Library <input type="checkbox"/> + Ancestors <input type="checkbox"/> + Descendants
Shelving Location	Raw Data	Equals	Select... <input type="button" value="^"/> <input type="button" value="v"/>
Last Circulated Date	Raw Data	Equals	<input type="text"/>

# Choose an Operator

In the Operator dropdown, choose how you want to limit the data. Common operator choices are

- **Equals** for a single value, e.g.
  - Owning, Patron, Circulation Library
  - Shelving Location, Circ Mod, Status
- **Is Null** or **Is Null or Blank** to find records that don't have data like Patron Email

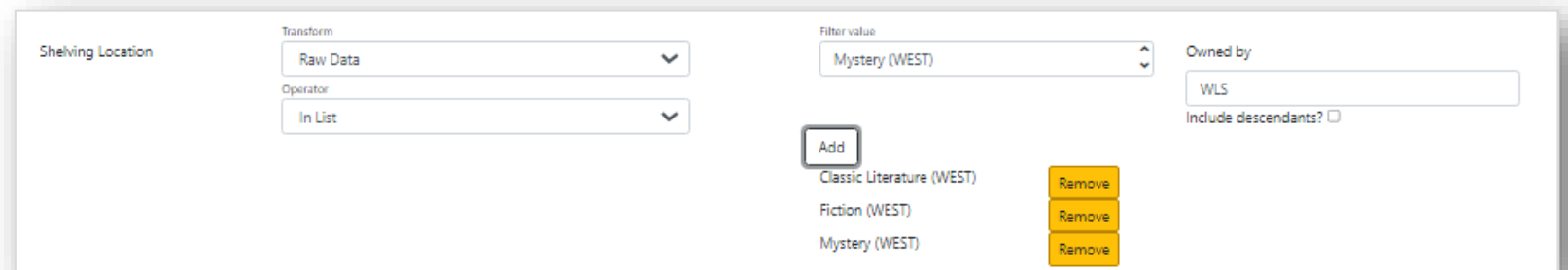
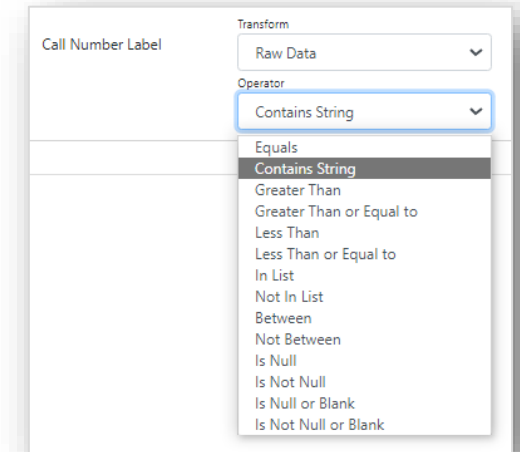
Filter Fields and Values

⊖	Owning Library	Transform Raw Data
		Operator Equals
⊖	Shelving Location	Operator Equals Does Not Equal In List Not In List Is Null Is Not Null

# More Common Operators

More common operator choices are

- **Between** for call number or date ranges
- **Less than or equal to** for dates on or before a date
- **Greater than or equal to** for dates after a date
- **Contains substring** for parts of call numbers, words like city names, street addresses, etc.
- **In List** for multiple values



# Choose or Enter Filter Values

Choose a value or values for each filter to limit your report data

For **In List** multiple values

1. Choose a value
2. Add
3. Repeat

Filter Fields and Values

⊖	Owning Library	Transform Raw Data	Filter value Library WLS
		Operator Equals	<input type="checkbox"/> + Ancestors <input type="checkbox"/> + Descendants
⊖	Shelving Location	Transform Raw Data	Filter value Mystery (WEST)
		Operator In List	Owned by WLS
			Include descendants? <input type="checkbox"/>
			Add Classic Literature (WEST) Remove Fiction (WEST) Remove Mystery (WEST) Remove
⊖	Last Circulated Date	Transform Raw Data	Filter value 1/1/2023
		Operator Between	and 6/30/2023

# Output Options Tab

1. Set up output options
  - Excel or CSV for spreadsheet
  - HTML for data snapshot (email the URL)
2. *Save and Schedule*
3. *Close* to go back to *My Reports/Outputs*

You can also *Save* the template without running it

The screenshot shows the 'Output Options' tab of a report configuration window. At the top, 'Report Type' is set to 'Weeding' and 'Report Name' is 'J Audiobook Weeding'. Below this are four tabs: 'Display Fields', 'Output Order', 'Filters', and 'Output Options'. Under 'Output Options', there are sections for 'Choose your output format(s)', 'Recurrence', 'Scheduling', and 'Email'. The 'Choose your output format(s)' section has checkboxes for 'Excel Output', 'CSV Output', 'HTML Output', 'Bar Chart', and 'Line Chart'. 'HTML Output' is checked. The 'Recurrence' section has a checkbox for 'Recurring Report?'. The 'Scheduling' section has radio buttons for 'Run Report Now' (selected) and 'Schedule Report For Later'. The 'Email' section has an 'Email Address' input field. At the bottom left is a 'Save and Schedule Report' button, and at the bottom right are 'Save' and 'Close' buttons.

The screenshot shows the 'My Outputs' tab of a report configuration window. At the top, there are 'My Reports' and 'My Outputs' tabs. Below them are 'Remove Filters' and 'Refresh' buttons. On the right, there is a '0 selected' indicator, a list icon, navigation arrows, a 'Rows 10' dropdown, and a settings gear icon. Below this is a table with columns: '# Report', 'Finish Time', and 'Output'. The table has a 'Filter' input for each column. The first row shows a report with ID '1', name 'weeding-no call-number', and finish time '6/20/23, 12:16 PM'. To the right of this row are 'HTML' and 'CSV' buttons.

#	Report	Finish Time	Output
1	weeding-no call-number	6/20/23, 12:16 PM	HTML CSV

# My Reports / My Outputs

When you create a report and run it,

- The output displays in *My Outputs* once it has finished running. Select the output type to view, share, or work with the results
- The report displays in *My Reports*. You can
  - Double-click to run, rerun, or edit the report (especially the filters) to run a new version
  - Use the Actions menu or right-click to
    - Clone
    - Edit
    - Delete

**Deleting a report also deletes its output.**

# Help and Links

- [Evergreen Simple Reports](#)

- Training recordings
- Presentation slides
- Step-by-steps

- [Evergreen Community Simple Reports](#)

- [Evergreen Reports Essentials](#)

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