



EVERGREEN ESSENTIALS: REPORTS

Get Set Up and Start Reviewing,
Maintaining, and Analyzing Your
Library Collection and Service



Today's Objectives

At the end of the session, you'll know how

- Templates, reports, and outputs work
- To set up subfolders to store your work
- To find and clone templates to get the information that you want
 - Missing, Weeding, New Patron Counts
- How to retrieve outputs to see results
 - Reports you ran
 - Delivered reports like Purchase Alerts
- The best reports workflow

Essential Terms

| | Meaning/Use |
|-------------------|---|
| Template | The broad setup, layout, and type of information needed |
| Report Definition | Report Definition - Sets up filters for the specific information needed |
| Output | <ul style="list-style-type: none">• The final results for that instance• Outputs are deleted after 18 months. Save locally if you need permanent versions.• Delivered outputs are outputs that someone else runs for you. You only have to retrieve the output, eg. Purchase Alerts |
| Clone | Make a copy of a template |

Navigation

- **My Folders** – where you organize your work in subfolders, run reports, and retrieve your report outputs
- **Shared Folders** – where you find templates to clone and other people's outputs
- **Find templates**
 - Search by keywords, usually in the Name field only
 - Browse Shared Folders Templates
 - *evergreen.reports*
 - *allisonmidgley>WLS Shared Report Templates (WEST)*
 - Bills and Payments
 - Circulation – look here for checkout, checkin, etc COUNTS
 - Catalog-Item/Collections – look here for item and title detail LISTS, especially for maintenance and collection development
 - Holds – purchase alerts
 - Patrons
- **Click on the grey arrow** next to a folder to open it and see a list of subfolders
- In a list of templates, reports, or outputs, the output is limited to 10 by default. Change it to All to view all the contents of the subfolder.

The screenshot displays a web interface for folder navigation. It is divided into two main sections: 'My Folders' and 'Shared Folders'. 'My Folders' contains 'Templates', 'Reports', and 'Output'. 'Shared Folders' contains 'Templates' and a subfolder 'evergreen reports'. Under 'evergreen reports', there are several report templates: 'Acquisitions (WEST)', 'Bills and Payments (WEST)', 'Circulation (WEST)', 'Collections (WEST)', 'Holds (WEST)', and 'Monthly Stats (WLS)'. Below this, there is a section for 'WLS Shared Report Templates (WEST)' with subfolders: 'Acquisitions (WEST)', 'Bills (WEST)', 'Catalog-Item (WEST)', 'Circulation (WEST)', 'Holds (WEST)', and 'Patrons (WEST)'. A 'Manage f...' link is visible. At the bottom, a table shows a list of reports with a 'Limit output to' dropdown menu set to 10. The dropdown menu is open, showing options: 5, 10, 25, 50, and All. The table has columns for 'name' and checkboxes. The first row is 'Bills and Payments by Payment Date, and Amount'. Other rows include 'List Bills Forgiven by Library and Date v2.4', 'List Patrons with Lost Materials Bills by Owning Library v2.4', and 'List Patrons with Lost Materials Bills by Owning Library v2021-06'.

| Select | All | Non | 10 | name |
|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bills and Payments by Payment Date, and Amount |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | List Bills Forgiven by Library and Date v2.4 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | List Patrons with Lost Materials Bills by Owning Library v2.4 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | List Patrons with Lost Materials Bills by Owning Library v2021-06 |

Essential Process

Setup. Create subfolders to store your work

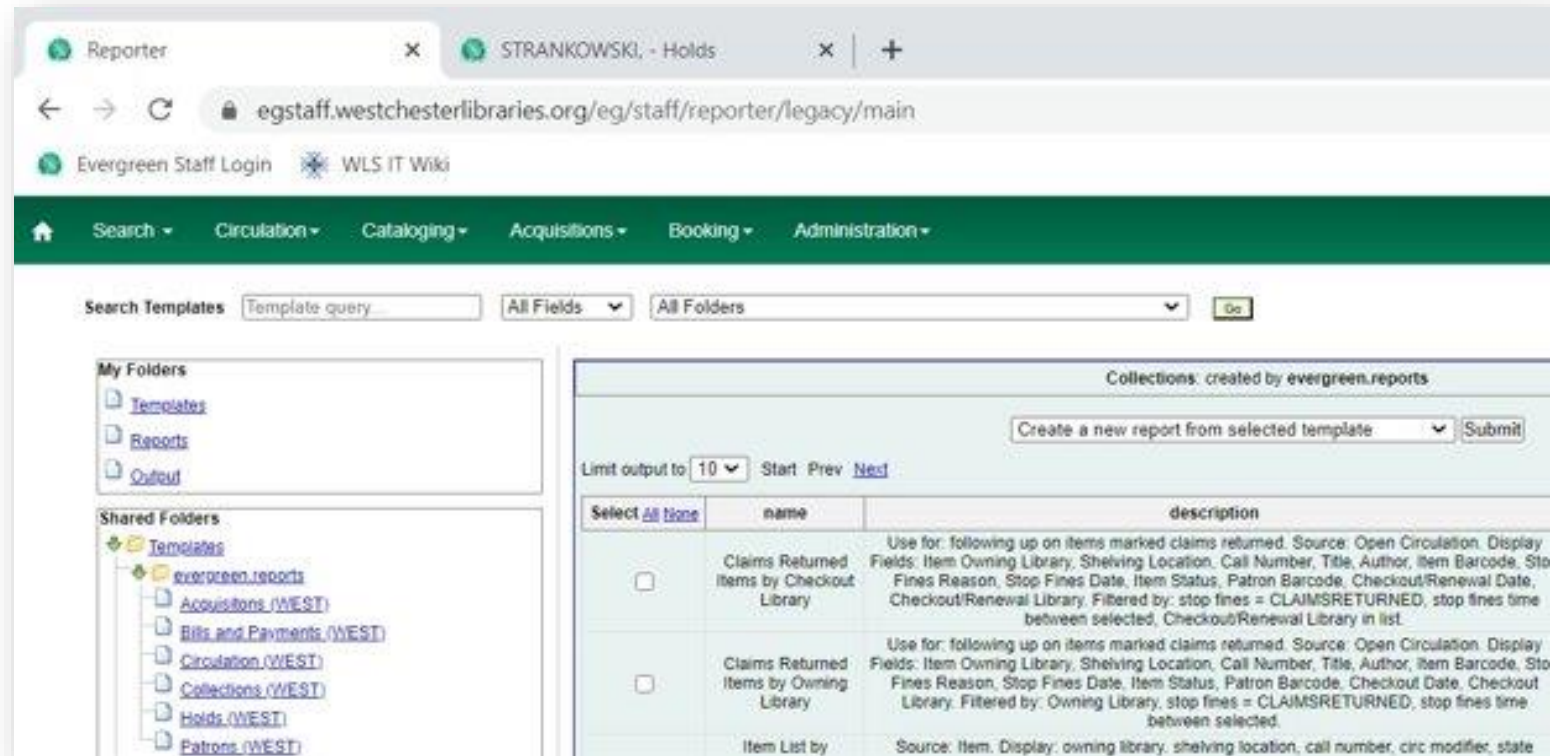
1. **Search** for and select an existing template

2. **Clone** it to your folders

3. **Set up** and run the report

4. **Retrieve** the output

5. Print or **export** to Excel



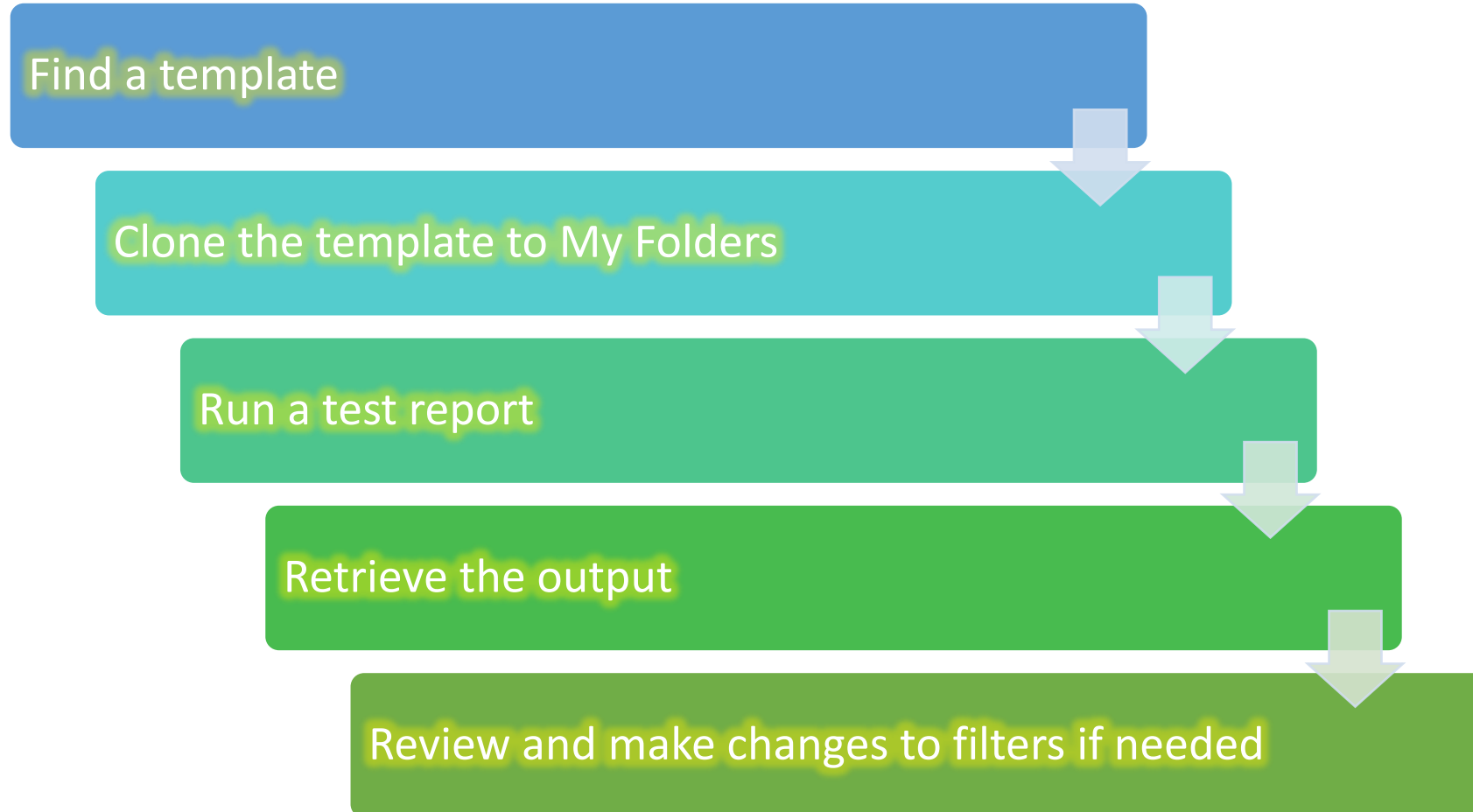
The screenshot shows the Evergreen Reporter web interface. The browser address bar displays `egstaff.westchesterlibraries.org/eg/staff/reporter/legacy/main`. The navigation menu includes Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. The main content area features a search bar for templates, a dropdown for 'All Fields', and another dropdown for 'All Folders'. Below the search bar, there are two panels: 'My Folders' and 'Shared Folders'. The 'Shared Folders' panel shows a tree view with folders like 'evergreen_reports', 'Acquisitions (WEST)', 'Bills and Payments (WEST)', 'Circulation (WEST)', 'Collections (WEST)', 'Holds (WEST)', and 'Patrons (WEST)'. The main panel displays a table of report templates with columns for 'name' and 'description'. The table lists two templates: 'Claims Returned Items by Checkout Library' and 'Claims Returned Items by Owning Library'. Each template has a checkbox in the 'Select All Items' column. The 'description' column provides details about the report's source and fields.

| Select All Items | name | description |
|--------------------------|---|--|
| <input type="checkbox"/> | Claims Returned Items by Checkout Library | Use for: following up on items marked claims returned. Source: Open Circulation. Display Fields: Item Owning Library, Shelving Location, Call Number, Title, Author, Item Barcode, Stop Fines Reason, Stop Fines Date, Item Status, Patron Barcode, Checkout/Renewal Date, Checkout/Renewal Library. Filtered by: stop fines = CLAIMSRETURNED, stop fines time between selected, Checkout/Renewal Library in list. |
| <input type="checkbox"/> | Claims Returned Items by Owning Library | Use for: following up on items marked claims returned. Source: Open Circulation. Display Fields: Item Owning Library, Shelving Location, Call Number, Title, Author, Item Barcode, Stop Fines Reason, Stop Fines Date, Item Status, Patron Barcode, Checkout Date, Checkout Library. Filtered by: Owning Library, stop fines = CLAIMSRETURNED, stop fines time between selected. |
| | Item List by | Source: Item. Display: owning library, shelving location, call number, circ modifier, state |

After the first time you clone a template and run it, go to an output to

- Run the same report again
- Run the report with different filters

Best Workflow



Never run reports from shared templates

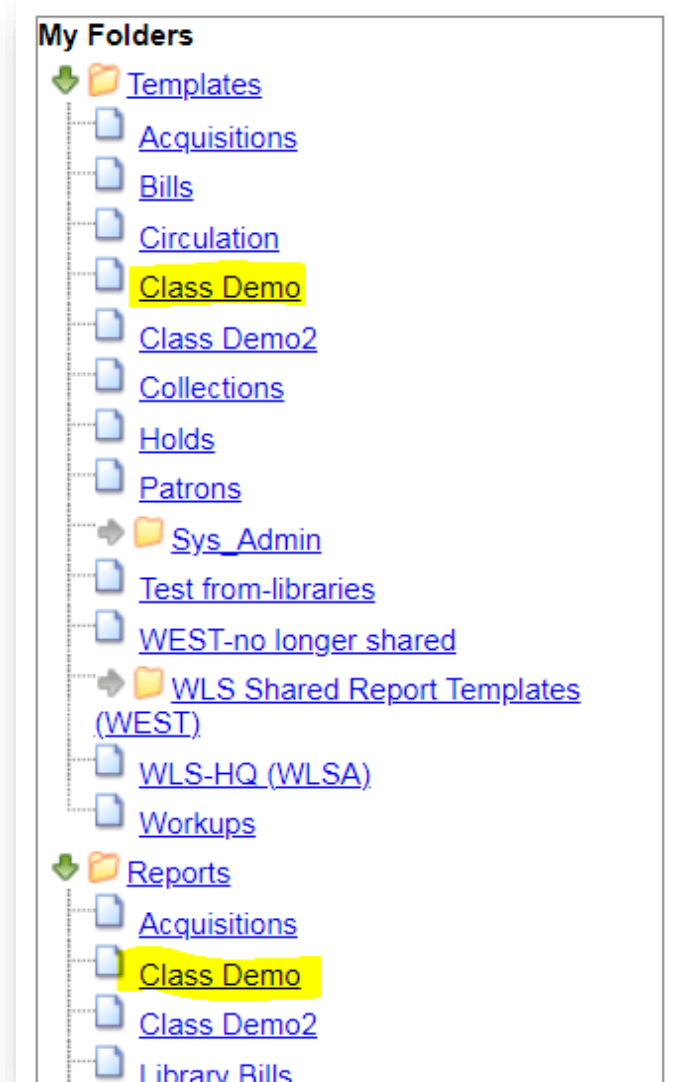
- Prevents templates from being deleted
- Old template versions can't be hidden from template searches
- Creates confusion

Set Up
Subfolders

To Organize Your Work

Set Up Subfolders

- It's important to set up folders prior to cloning or running reports.
- Create **corresponding** subfolders within Templates, Reports, and Outputs to store and organize these components for easier use and location
- Broad category names - like Circulation, Patrons, Collections, Bills, Holds - are recommended



Set Up Subfolders How-to

1. In My Folders, click the folder name *Template*. The *Create a Subfolder* screen displays.
2. Enter a Folder Name.
For example, “Library Patrons”
3. Click *Create Sub Folder*.
4. Click on the *Reports* folder. The subfolder name will carry over from the *Templates* subfolder that you just created. Click *Create Sub Folder*
5. Click on the *Output* folder. The subfolder name will carry over from the *Templates* subfolder that you just created. Click *Create Sub Folder*
6. To create additional subfolders, click on the *Template* folder and repeat steps 2-5.

Search Templates All Fields All Folders

My Folders

- Templates
- Reports
- Output

Shared Folders

- Templates
- Reports
- Output

Create a new sub-folder. Folder type: Template

| | |
|--|--|
| Folder Name: | <input type="text" value="Library Patrons"/> |
| Share this folder: | Share |
| Share with: | Ada Neighborhood Library |
| <input type="button" value="Create Sub Folder"/> | |

Clone a Template

- **Make a copy of a template in your folders so that you have access to it in the future and can make changes later**
- **Delete unneeded templates; reports and outputs will also be deleted**

Clone a Template to My Folders

To locate the shared report template that you want to clone

- Search for a template by name or description in shared folders

For example:

Search Templates Description ▾

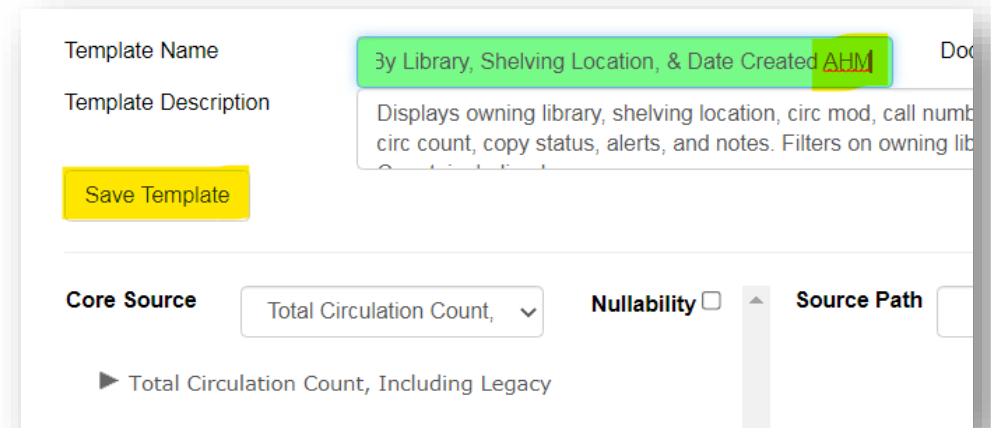
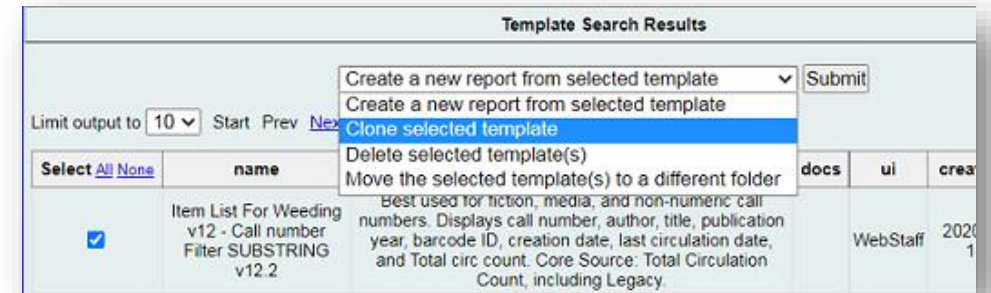
Search Templates Name ▾

- Browse to a template
 1. Go to Shared Folders > Templates >
 - evergreen.reports>
 - allisonmidgley>WLS Shared Report Templates (WEST)
 2. Click on the grey arrow to view the subfolders
 3. Click on a folder to view the templates that it contains

Name Template and Save

When you find the template that you want to clone,

1. Click the check box next to the template.
2. From the dropdown menu at the top of the screen, choose **Clone selected template**
3. Click **Submit**. Your **My Folders>Templates>**subfolders display.
4. From your folder list, select the folder and **Select**. The report template builder displays.
5. Change the *Template Name*, eg. add your initials or a version number.
6. Click **Save Template**. The template is now stored in your local subfolder. Proceed with Set Up and Run a Report instructions.



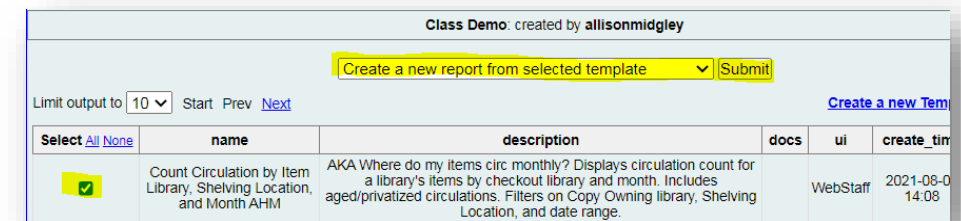
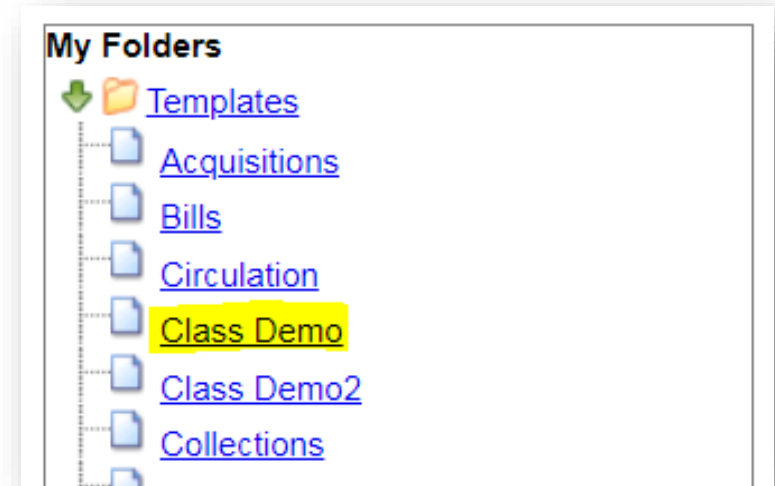
Set Up and Run a Report

There are two ways to run reports.

- Use your cloned report template to create a Report definition and output.
- Set up and run a report from an existing output.

Run a Report From A Template

1. Go to **My Folders**
2. Click the grey arrow by **Templates** to see the subfolders. Click the subfolder that contains the report template you need OR use the search at the top of the page to find matching templates.
A template list loads.
3. In the template list, click the check box next to the report template that you want to run.
4. From the dropdown menu at the top of the screen, choose **Create a new report from the selected template**, and click **Submit**.
The **report definition** screen displays.



Run a Report: Name, Set Columns, Store

1. Assign a **Report Name**. Hint: copy the Template Name into the Report Name field and customize.
2. Enter a **Report Description** (Optional). Hint: copy the template description into the Report Description field and customize.
3. Choose **Pivot Label Column** and **Pivot Data Column** (optional). This sets up columns to make your report easier to read and sets display preferences for a bar chart.
4. Select a subfolder to store the report definition.

| | |
|--|---|
| Template Name: | Count Circulation by Checkout Library, Shelving Location, and Date Range |
| Template Creator: | allisonmidgley |
| Template Description: | Displays circulation count by checkout library and shelving location. Includes Checkout library, Shelving Location, date range. |
| Report Name: | GRE YA circ 2019-present |
| Report Description: | <input type="text"/> |
| Report Columns: | Circulating Library Shelving Location Name # of Circulations |
| Pivot Label Column: | Circulating Library |
| Pivot Data Column: | # of Circulations |
| Choose a folder to store this report definition: | Selected Folder: Library Circulation Report Folders Library Holds Library Collections Library Users Library Circulation Library Bills Sys_Admin WLS Shared Reports WLS-HQ Workups Acquisitions |

Run a Report: Set Up Filters

Select the **User Param[eters]**. There may be **Field Hints** that provide more information.

- Enter dates YYYY-MM-DD or choose from calendar where available.
- Note the operator (between, contains, etc) to correctly enter date or call number information.
- You must fill out all filters. If you don't need to limit by a filter,
 - In a list, select and add all choices
 - In a date filter, add the most recent or the oldest date to include all data

| Column | Transform | Action | User Params |
|---|-----------|---------|---|
| Combined Aged and Active Circulations -> Checkout Date/Time | Date | Between | Real Date [calendar icon] 2019-03-13 - And - Real Date [calendar icon] 2021-05-13 |
| Organizational Unit -> Organizational Unit ID | Raw Data | In list | GRE S_HAR HAR HWE S_HAS Add Del GRE |
| Copy/Shelving Location -> Location ID <u>Shelving Location</u> | Raw Data | In list | Urban Fiction Video Game Westchester Reference YA Audiobooks & Movie Add Del YA Audiobooks & Movie YA Biography YA College Info YA Express Item |

Run a Report: Output options

1. Choose output options by using the check boxes
 1. **Excel Output** is good for your full report
 2. **HTML Output** is good for a preview
 3. **Bar Charts** are okay for small data sets. Deselect for lists.
2. Choose when to **Run** [the report]
 1. To test a report, or for a one off, choose **as soon as possible**.
After you know that your report tells you what you want to know, you can set up recurrence to run a report weekly, monthly, etc.
 2. **(optional) Enter an email address to be notified when large or recurring reports finish.**
3. Click an **Output subfolder** to store the output.
4. Click **Save Report**.

Output Options

- Excel Output
- CSV Output
- Calculate grouping subtotals
- HTML Output
 - Bar Charts
 - Line Charts

Recurring Report:

Recurrence Interval: 1 Day(s)

Run as soon as possible
 2021-05-25 Noon

Send completion notification to this Email address:

Selected Folder: **Library Circulation**

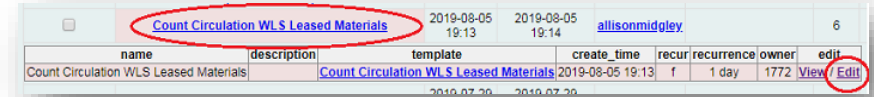
- Output Folders
 - Library Holds
 - Library Bills
 - Library Circulation
 - Library Users
 - Library Collections
 - Sys_Admin
 - Weekly Reports
 - WLS Shared Report Output
 - WLS-HQ
 - Workups
 - Acquisitions

Choose a folder to store this report's output:

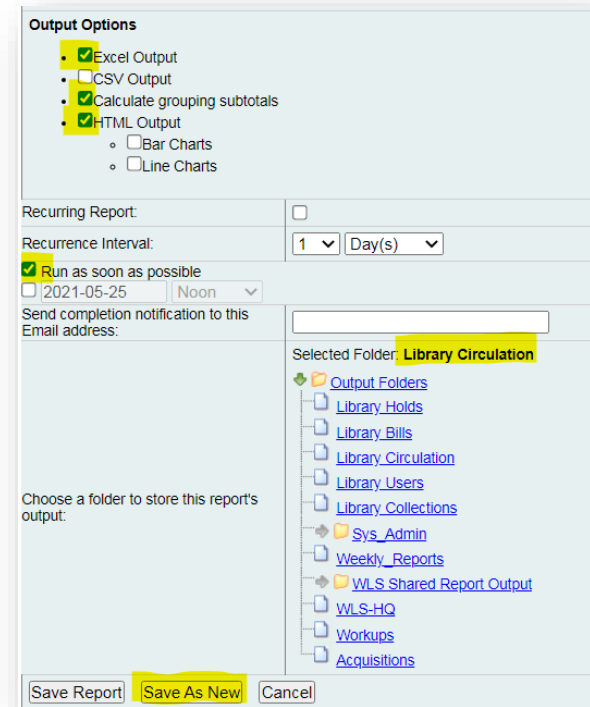
Save Report Save As New Cancel

Run a report from an existing output

1. Go to the output that you want to replicate.
2. Click on the name of the output. A pink bar will open with more information.
3. On the right-hand side, click Edit. The report definition screen will open.
4. Enter a new name and edit the existing filters to make a variation of the existing report.
5. Verify or edit folder locations.
6. **Save as new** to create a new report.



| name | description | template | create_time | recur | recurrence | owner | edit |
|--|-------------|--|------------------|-------|------------|-------|---|
| Count Circulation WLS Leased Materials | | Count Circulation WLS Leased Materials | 2019-08-05 19:13 | f | 1 day | 1772 | View / Edit |



Output Options

- Excel Output
- CSV Output
- Calculate grouping subtotals
- HTML Output
 - Bar Charts
 - Line Charts

Recurring Report:

Recurrence Interval: 1 Day(s)

Run as soon as possible

Send completion notification to this Email address:

Selected Folder: **Library Circulation**

Choose a folder to store this report's output:

- Output Folders
 - Library Holds
 - Library Bills
 - Library Circulation
 - Library Users
 - Library Collections
- Sys_Admin
- Weekly_Reports
- WLS_Shared_Report_Output
- WLS-HQ
- Workups
- Acquisitions

Buttons: Save Report, **Save As New**, Cancel

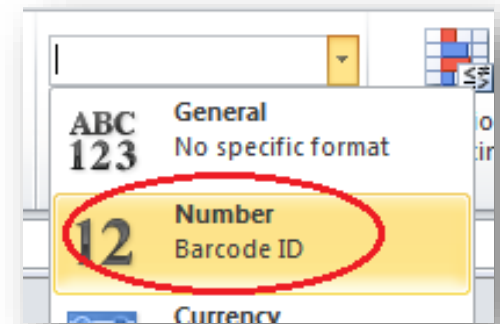
Retrieve the Output

Important Output Notes

- Outputs are deleted after 18 months. Save locally if you need permanent versions.
- Delivered outputs are outputs that someone else runs for you. Usually you will go to *Shared Folders > Outputs* to retrieve the output, eg. Purchase Alerts

Retrieve the Output

1. Go to the **Output** subfolder where you chose to store the results.
2. When your report appears in **Completed Items**, check the box next to it, select **View report output**, and click **Submit**. The output window displays.
 1. If you chose a bar chart, it displays.
 2. Click **Tabular Output** to preview results or see small result sets.
 3. Click **Excel Output** to download the full report.
3. **In Excel output, barcode IDs must be reformatted to display as 14-digit numbers.**
 1. Select the barcode column
 2. In the Numbers format dropdown, choose Number. Numbers will display with decimals
 3. Use the decrease decimal button to remove the decimals.



Viewing Delivered Report Output

To retrieve output for reports that are set up to auto-run, such as Purchase Alert reports,

1. Go to a subfolder under Output. This is usually in **Shared Reports>Output>sharer.name>Weekly, monthly, etc>** name of report
2. In Completed Items, check the box next to the output.
3. At the top of the green window, from the dropdown menu, select View report output
4. Click Submit. The output window displays.
5. Click Tabular output to preview results or see small result sets.
6. Click Excel Output to download the full report.

Click here for [Purchase Alert Reports](#) details

Tips and Hints

- Templates with "Count" in the name are usually numbers only. "List" reports include details of individual items, titles, patrons, etc.
- After you clone a template to your folders, run a test report from there. If it gives you the results that you expect, use the output to run similar reports – it has most fields filled in. Use Run as New to get a new result.
- The Reports folder is where report definitions are stored. It's largely ignored.
- Delete templates that you don't need from your My Folders > Templates. It will also delete associated report definitions and outputs.
- Download outputs to your local storage. They are deleted from the Evergreen server after 18 months.
- Use a weeding report to create a shelf list by entering today's date in the Date Created and Last Checkout Date filters.

Examples

Looking for a Shared Template?
Use the **terms in bold** and
search in the Name field

- List Items by **Copy Status** v.2 - create missing, lost, damaged, and other item maintenance lists
- Detailed **Weeding** Lists by Call Number Range, Call Number Substring, no call number
- **Claims Returned** Items By Checkout or Owning library - clean up items in limbo
- **Circulation Count** by **Shelving** Location (year+month)
- List **Titles** With **High Circ** – find out what's popular at your library
- Annual Circ Count By **Dewey** 10's or 100's – nonfiction use stats
- Count Items by Shelving Location and **Pub Year** – find out how old your collections are
- Count **Recent** Users by Library & Profile – find out how many current users
- Patrons with **Preferred** Names
- Patrons by **Date of Birth** and Profile

Help and Links

- [Evergreen Reports Essentials on the IT Wiki](#)
 - Training recordings
 - Presentation slides
 - Step-by-steps
- Allison Midgley
- training@wlsmail.org
- support@wlsmail.org

