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

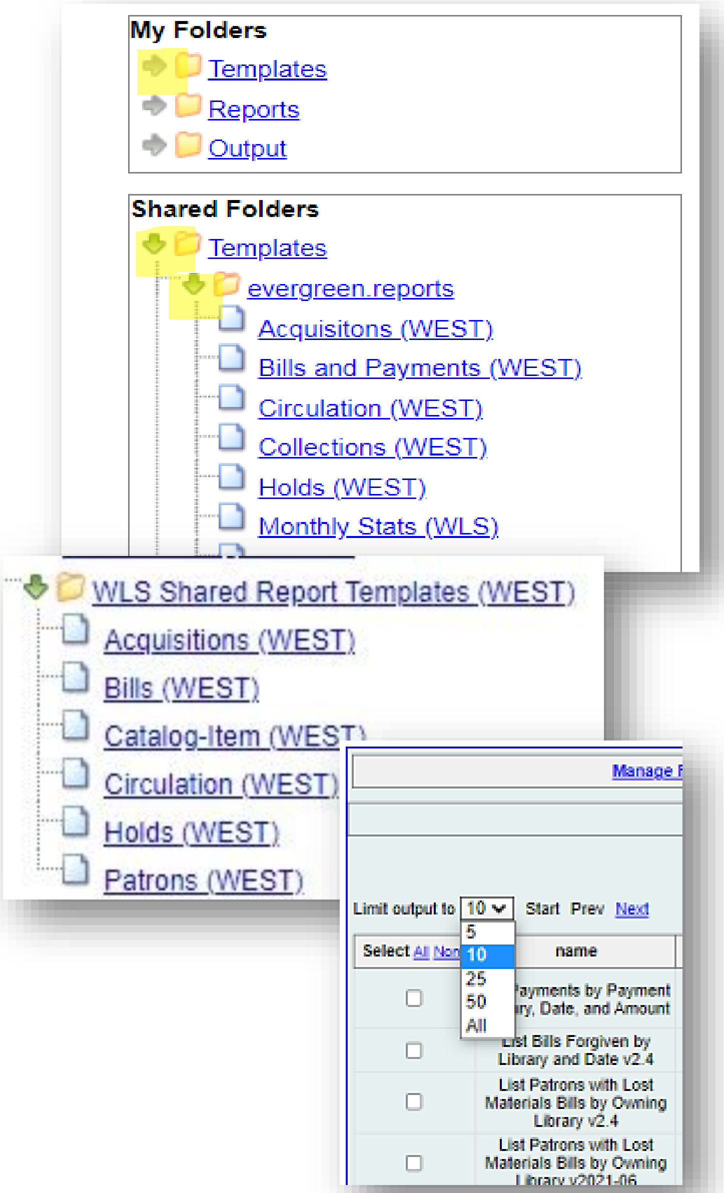
Essential Terms

	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	• 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.



Essential Process

Setup. Create subfolders to store your work

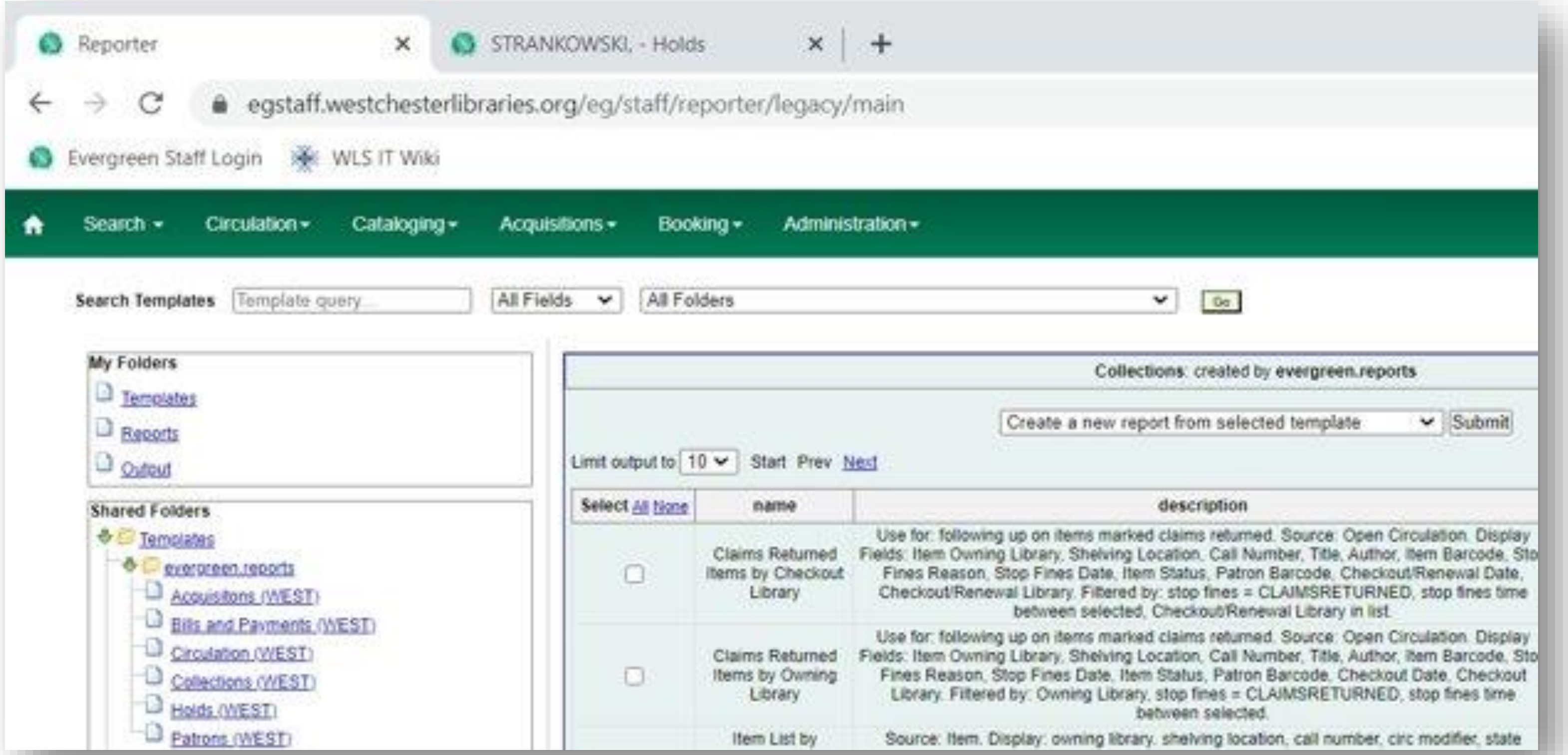
1. **Search** for and select an existing template

2. **Clone** it to your folders

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

4. **Retrieve** the output

5. Print or **export** to Excel



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

1. Find a template
2. Clone the template to My Folders
3. Run a test report
4. Retrieve the output
5. Review and make changes to filters if needed

Never run reports from shared templates

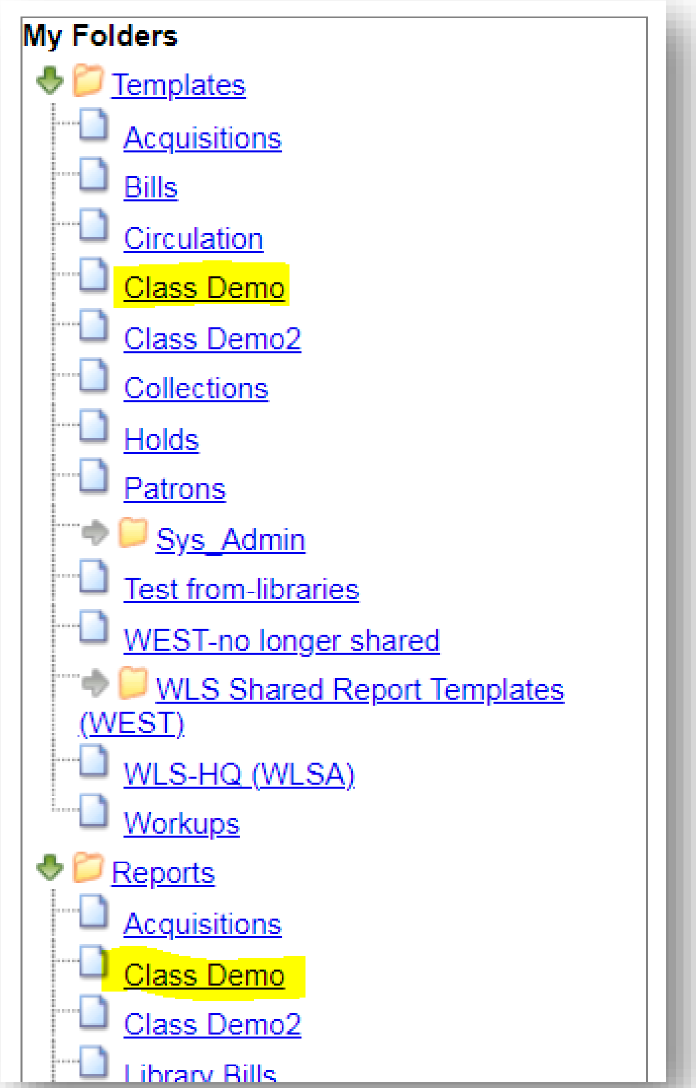
- Prevents templates from being deleted
- Old template versions can't be hidden from template searches
- Creates confusion

Set Up Subfolders

To Organize Your Work

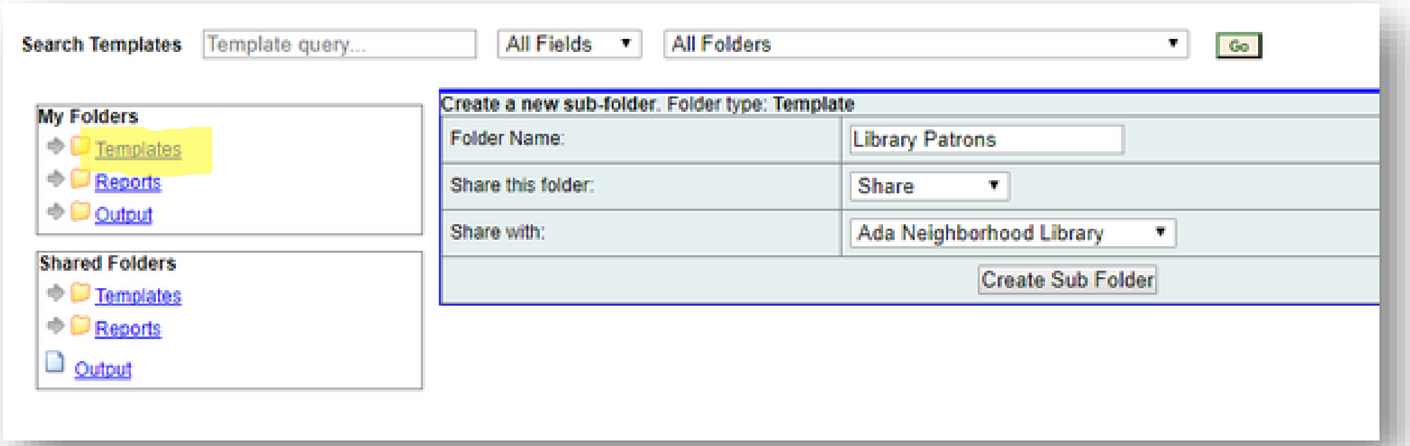
Set Up Subfolders

- **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.

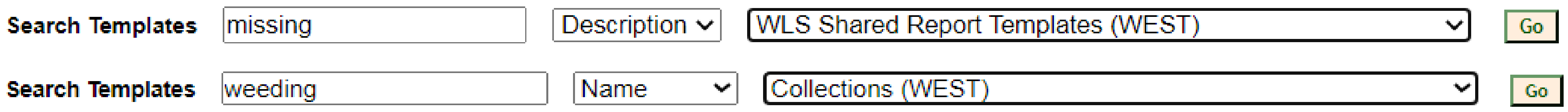
Clone a Template

- **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:

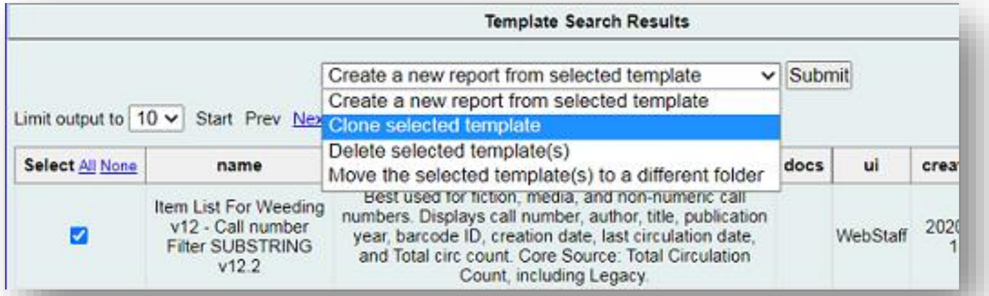


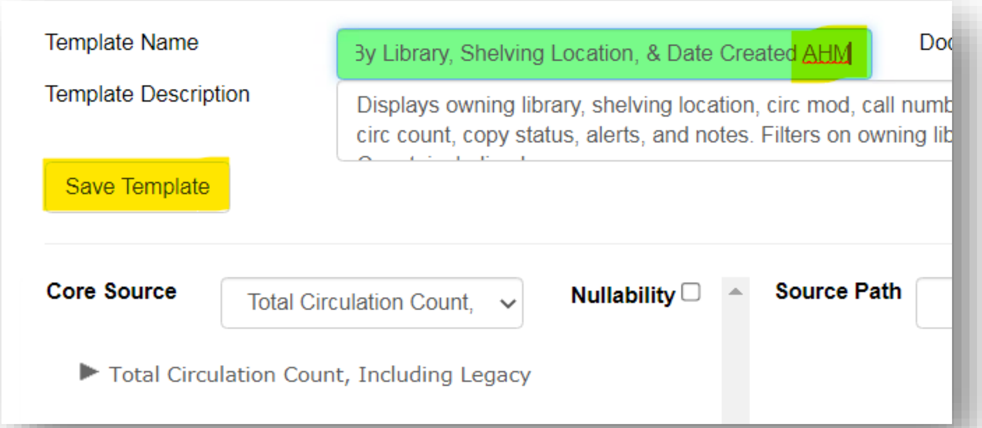
- Browse to a template
  1. Go to Shared Folders > Templates >
     - evergreen.reports>
     - allisonmidgley>WLS Shared Report Templates (WEST)
  2. Click on the grey arrow to view the subfolders
  3. Click on a folder to view the templates that it contains

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.





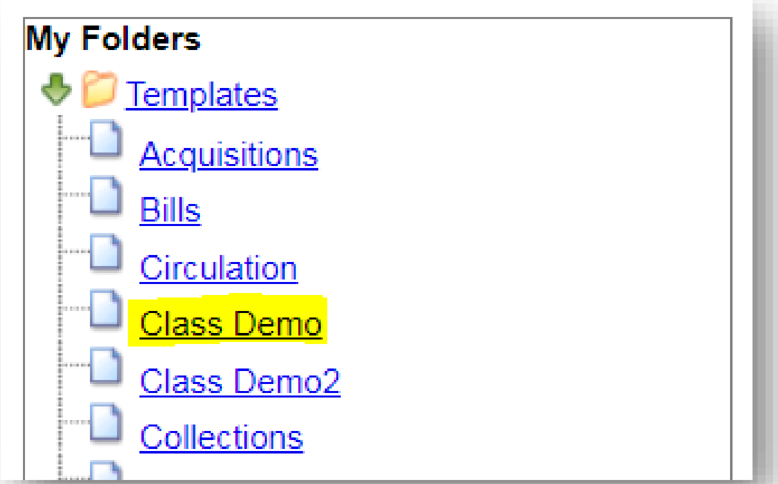
Set Up and Run a Report

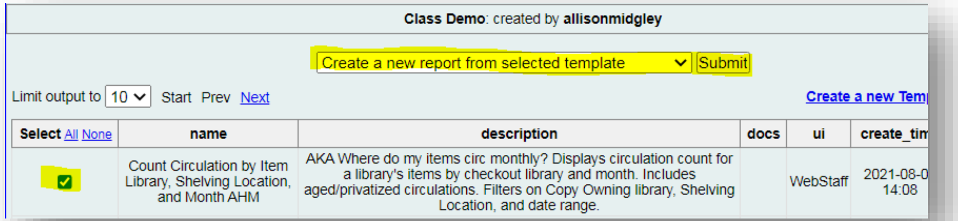
There are two ways to run reports.

- 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

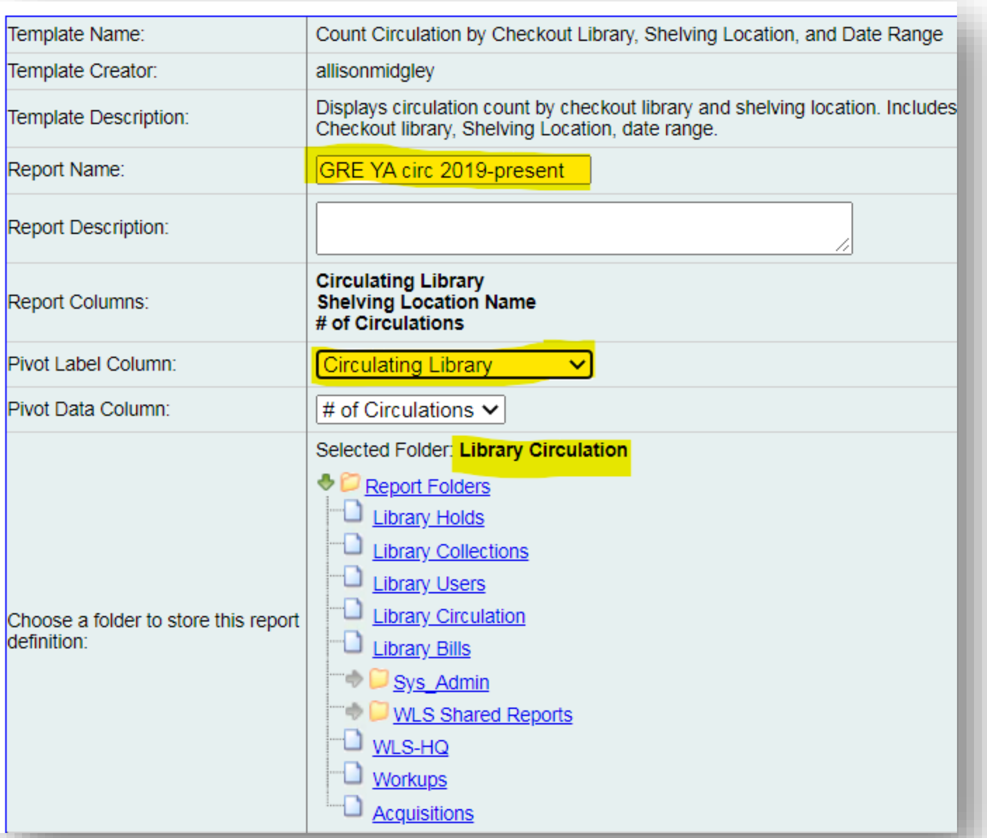
1. Go to **My Folders**
2. Click the grey arrow by **Templates** to see the subfolders. Click the subfolder that contains the report template you need OR use the search at the top of the page to find matching templates.
   A template list loads.
3. In the template list, click the check box next to the 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

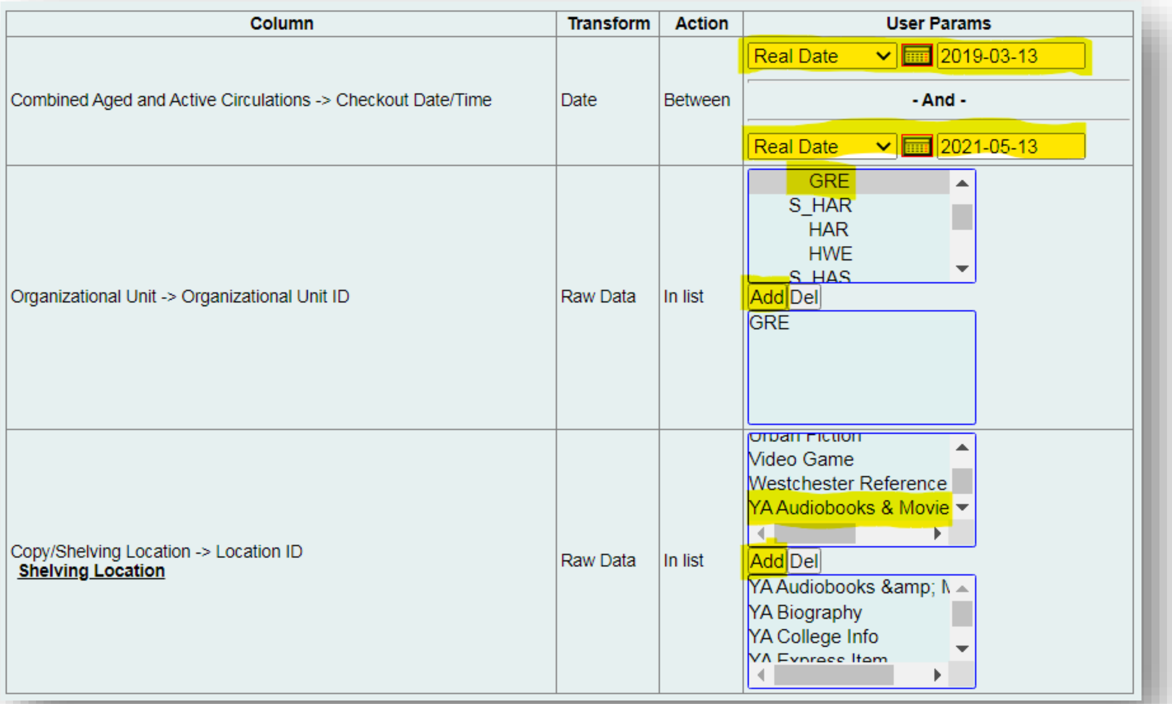
1. Assign a **Report Name**. Hint: copy the Template Name into the Report Name field and customize.
2. Enter a **Report Description** (Optional). Hint: copy the template description into the Report Description field and customize.
3. Choose **Pivot Label Column** and **Pivot Data Column** (optional). 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.



Run a Report: Set Up Filters

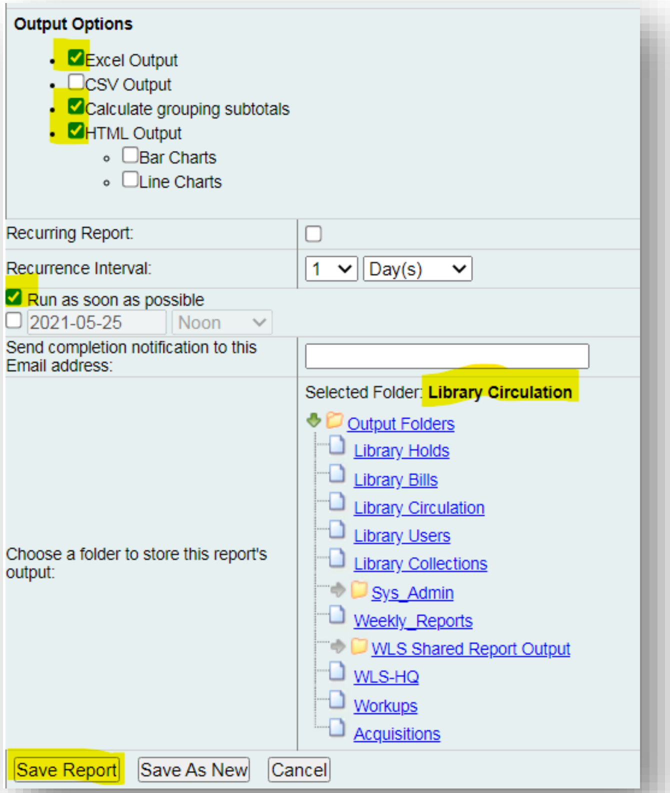
Select the **User Param[eters].** There may be **Field Hints** that provide more information.

- 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



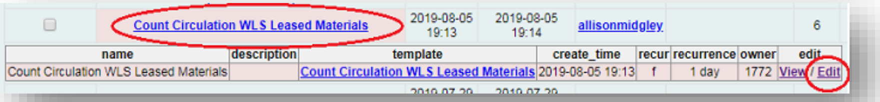
Run a Report: Output options

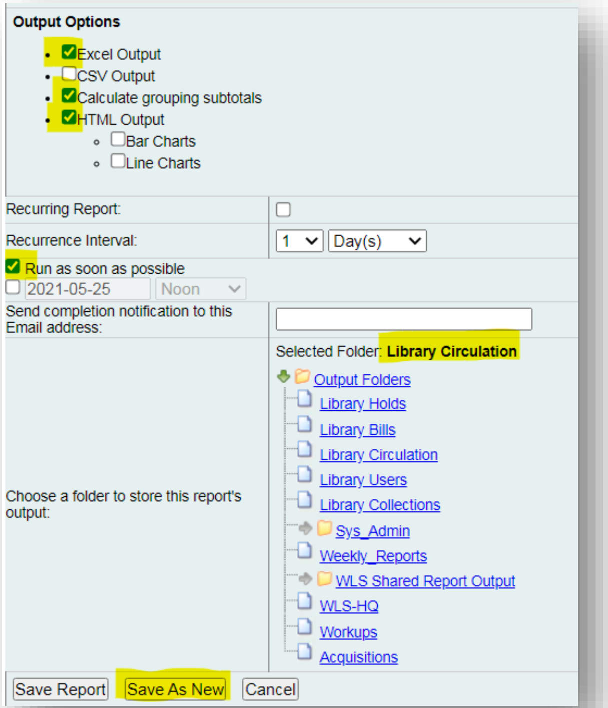
1. Choose output options by using the check boxes
   1. **Excel Output** is good for your full report
   2. **HTML Output** is good for a preview
   3. **Bar Charts** are okay for small data sets. Deselect for lists.
2. Choose when to **Run** [the report]
   1. To test a report, or for a one off, choose **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**.



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.





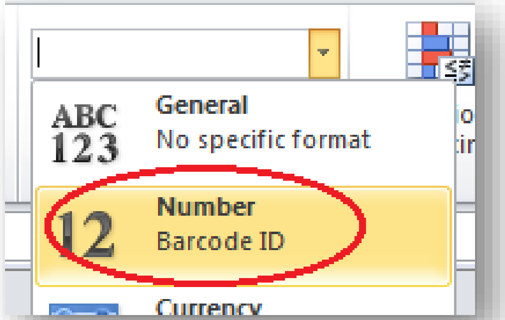
Retrieve the Output

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
- **Circ**ulation 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

westchester
LIBRARY SYSTEM
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