EVERGREEN REPORTS FOR WEEDING & COLLECTION MAINTENANCE

Use Evergreen Circulation and Item Data to Keep Your Collection Fresh

Today's Objectives

In today's session, we'll

- Review Evergreen reports essentials like how to
  - Set up subfolders to store your work
  - Find and clone templates
  - Set up and run reports
  - Retrieve outputs to see the information
- Learn the best templates
  - to look for missing and lost items
  - for weeding
  - for lists of items that have missing or wrong information
  - to get circulation for groups of items by shelving location or call number
  - for replacement needs

Essential Terms

Term	Meaning/Use
Report Components	• **Template** – Report "outline" to clone Identifies the source and type of information needed • **Report Definition** – Filters the template's information Identifies the specific information needed • **Output** – displays the report information for the one time you set up the report definition and ran it Delivered outputs are outputs that someone else ran for you. You only have to retrieve the output, eg. Purchase Alerts
Report Parts	• **Display Field** – column in the output • **Filter** – "User Param" limit the data
Source	• the dataset from which you can choose data points • A template uses ONE source • Aged (privatized) data sources must be used to get historical data

Navigation

- **My Folders** – where you organize your work in subfolders and run reports
- **Shared Folders** - find a template to clone
  - Search – by name first
  - Browse Shared Folders Templates
    - *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
    - *evergreen.reports*
- **Click on the grey arrow** next to a folder to open it and see a list of subfolders

Essential Process

Setup. Create subfolders to store your work

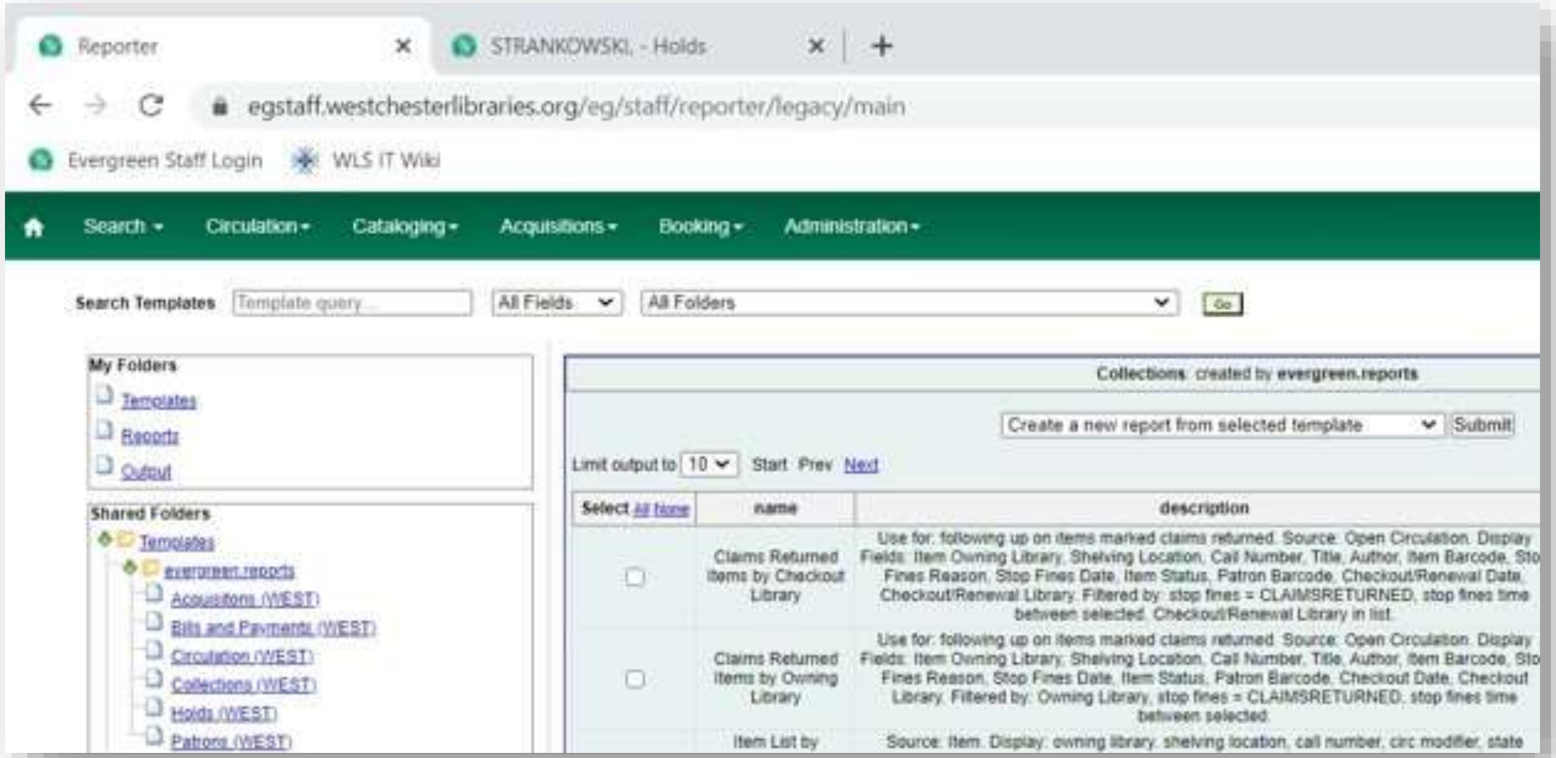
1. Search for and select an existing template

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

Review Process

- Set up subfolders
- Clone a template
- Run a report
- Retrieve the output

Set Up Subfolders

- **Set up folders prior to cloning or running reports so you have a place to put your work**
- 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, Catalog-Items, Holds, are recommended

1. In My Folders, click the word *Template*. The Create a Subfolder screen opens.
2. Enter a Folder Name. For example, "Circulation."
3. Click *Create Sub Folder*.
4. Click on the *Reports* folder. Repeat 2 – 3. (The subfolder name will carry over from the Templates subfolder that you just created.)
5. Click on the *Output* folder. Repeat 2-3.
6. To create additional subfolders, click on the main folder name again and repeat steps 2-5.

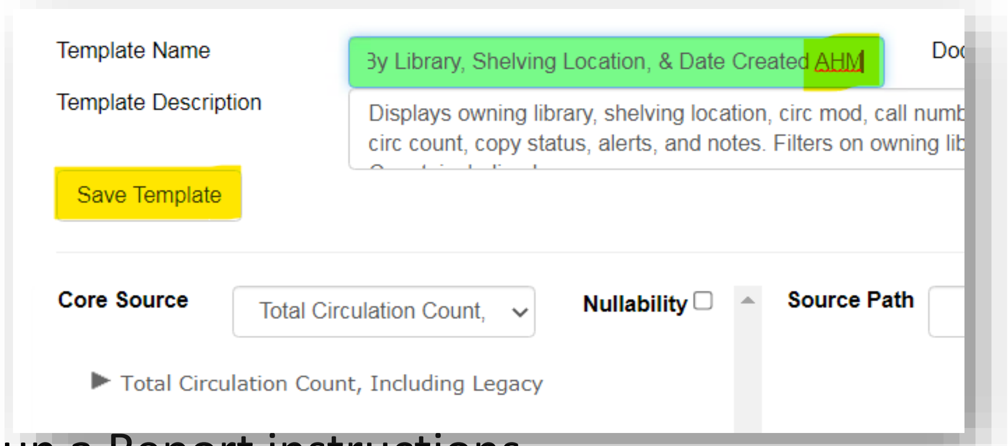
Find a Template To Use

- **Clone a template from a shared folder to your own folders** so you can manage your report templates and run reports
- **Search for a template** by name or description in all or shared files. For example,
  - to find a template to set up a missing report, search for Missing limited to Description.
  - to find a template for circ by call number, search for Call Number, limited to Name
- **Browse** the shared report template folders

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. Change the Limit dropdown to All.

Clone a Template

- When you see the template that you would like to clone,
  1. Click the check box next to the report.
  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 in which you want to save the cloned template. The report template builder displays. This is where you could make changes to the template.
  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 the Set Up and Run a Report instructions.



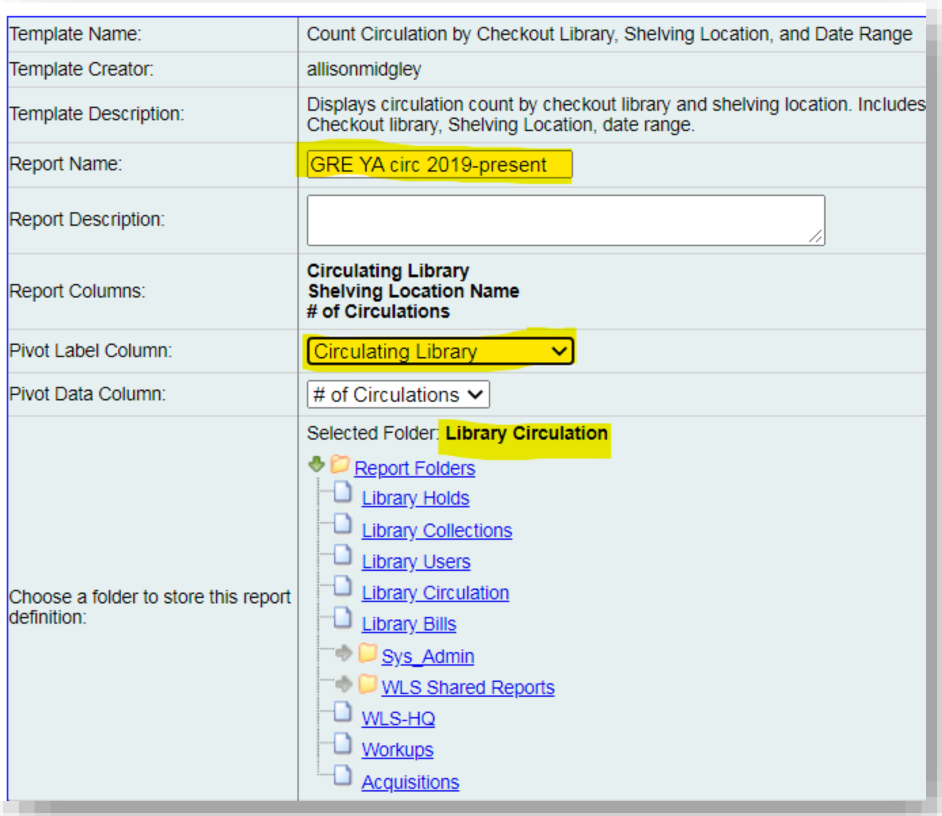
- Delete unneeded templates; reports and outputs will also be deleted

Run a Report From A Template

1. In **My Folders,** click the grey arrow by **Templates** to see the subfolders. Open the subfolder that contains the report template you need and click it to view templates.
2. In the template list, click the check box next to the report template that you would like to run.
3. 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 with the Template Name, Template Creator, and a Template Description for the report template.

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** (optional). Your choice will be the columns in the results table. It also sets display preferences for a bar chart.
   Ignore for list reports.
4. Select a subfolder to store the report definition.



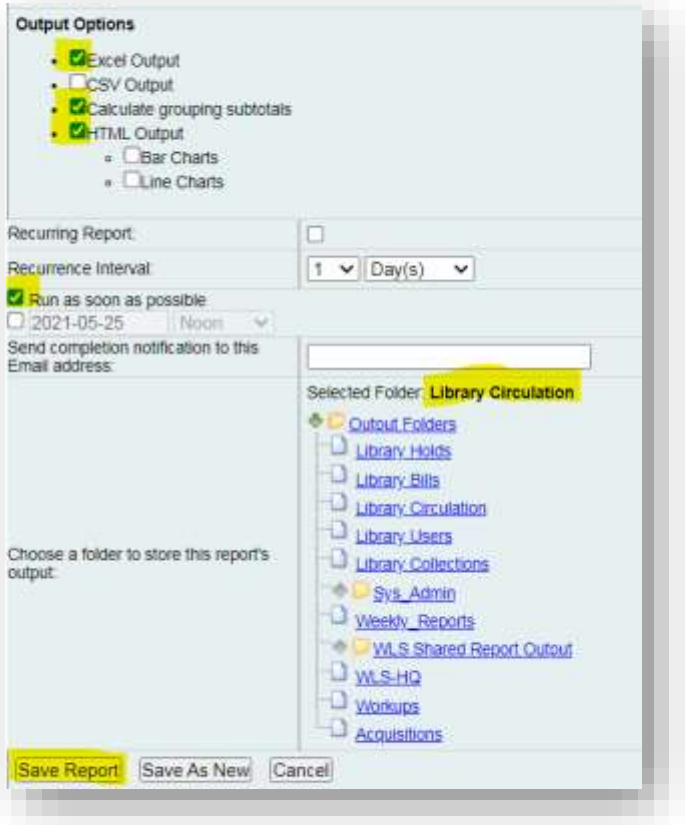
Run a Report: Set Up Filters

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

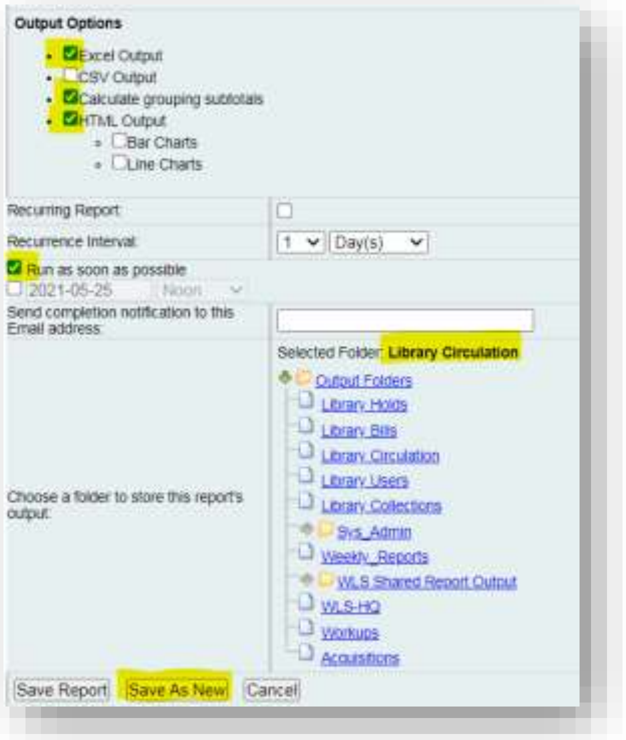
Run a Report: Output options

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**.



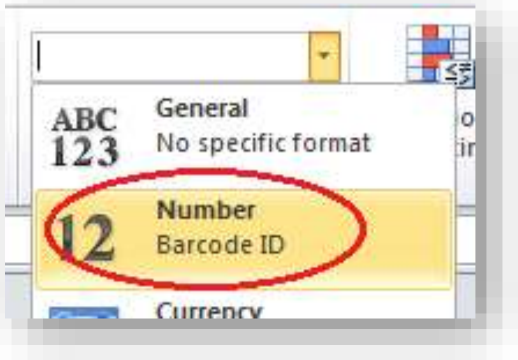
Run a report from an existing output

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

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. LibreOffice displays barcodes in the correct format.**
   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.



Weeding Templates

- By Call Number Range
- By Call Number Substring
- Without Call Number Filter

Shelf Lists and Weeding Lists

Last checkout dates only display for items checked out in Evergreen or for Lost items

1. Detailed Weeding List by Call Number Range
   - Displays bibliographic information; creation date; **branch and consortium level YTD circ, Lifetime circ counts, and last checkout dates**; item status; alerts; notes, and circ modifier.
   - Filters on owning library, shelving location, call number RANGE, is deleted=F. Source: Item Statistics View.
2. Detailed Weeding List by Call Number SUBSTRING
   - Displays bibliographic information, creation date, **branch and consortium level last circulation dates, YTD circ, and Lifetime circ counts**, item status, alerts, notes, and circulation modifier.
   - Filters on owning library, shelving location, call number SUBSTRING, is deleted=F, last circ date (before), date created [(before) excludes new items]. Source: Item Statistics View.
3. Detailed Weeding List by Shelving Location
   - Displays bibliographic information, creation date, branch and consortium level YTD circ , Lifetime circ counts, and last checkout dates, item status, alerts, notes, circulation modifier.
   - Filters on owning library, shelving location, is deleted=F, last circulation date (less than or equal), and creation date (less than or equal). Source: Item Statistics View.
4. Simple Weeding Shelflist

Other Collection Maintenance Templates

- **Circulation**
- **Catalog-Item**
- **Holds**

Collections / Catalog-Item

Search terms in **Bold**

- Item Lists For **Weeding**
- To create a shelf list, use a **weeding** list and enter today's date in both filters
- Items With Circ Greater Than by **Shelving Location** to find “grubby” items
- **Count** Items by Shelving Location & Copy **Status**
- List Items By **Copy Status** finds all Lost, Lost and Paid, Missing, etc
- List **Duplicate** Titles by Shelving Location and Library v4.1
- **Claims Returned** Items by Owning Library or by Checkout Library
- List **Lost Item Bills** by Owning Library With Patron Information
- Items Missing **Price** Data
- **Pre-cat** Titles
- Unknown **Stat Cat** Items

Circulation (WEST)

Search terms in **Bold**

- **Count Circulation** by Checkout Library, Shelving Location, and Date Range
- **Count Circulation** by Owning Library, Shelving Location, and Date Range
- Count Circ by **Call Number** (in a month)
- Item **List** by **Call Number** With Circ For a Date Range
- List Titles Used **In House**

Help and Links

- Evergreen Reports Essentials on the IT Wiki
- support@wlsmail.org

- Allison Midgley
- training@wlsmail.org

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