

Technical Services Interest Meeting Minutes

Tuesday, August 12, 2025 9:30 AM to 10:30 AM

As no topics were submitted in advance, Allison Pryor compiled some help desk tickets worth discussing

- **Deleted Items:** Allison and Lindsay discuss the process of reactivating deleted items in Evergreen, explaining that once a barcode is deleted, it cannot be reused or undeleted, requiring a new barcode and record creation with any historical statistics added as a note.
- **Batch Edit Item - manually vs. using template:** When batch editing multiple items, keep in mind that if you're using a template to update items (such as changing from new nonfiction to regular nonfiction), users should leave the status field blank to avoid permission blocks, especially for checked-out or in-transit items.
 - Lindsay suggests that for simple changes like updating shelving locations, using Item Status for batch editing might be more efficient than templates.
- **Reporter Access Issues After Upgrade:** Lindsay discussed issues with accessing shared outputs in the reporter since the 3.14 upgrade, explaining that users need permissions to view both report definition and template folders associated with outputs. She notes that the Simple Reporter has different problems because it lacks the same folder structure for sharing permissions.
 - Lindsay is investigating whether the security update can be reversed or if users should migrate from Simple Reporter to Advanced Reporter.
 - She is also developing comprehensive reports training materials and is asking the group to send her their specific reporting needs and preferences for future training sessions.

Evergreen Reports – Quick Reference

Lindsay gave a “quick” demonstration of her in-progress Reports Training PowerPoint slide deck, highlighting key concepts that will be expanded on in future training sessions. She recommended starting small when creating or modifying report templates, beginning with basic information and gradually adding complexity through incremental changes. It's perfectly normal

to have to repeat the process, as there is typically a lot of trial and error running reports and getting the desired result.

- Access & Permissions (Post-3.14 Upgrade)
 - To view shared outputs, users need permissions for both the **report definition** and **template folders**.
 - **Simple Reporter** lacks folder structures for sharing; consider migrating to Advanced Reporter.
 - Security update changes may be reviewed for possible reversal.
- Database Structure & Hierarchy
 - Evergreen data is stored across multiple interconnected tables (31 for items alone).
 - Example: Call numbers are separate from items but linked in the database.
 - Start with the **highest-level field** (e.g., call number volume) to avoid circular references and slow queries.
- Joins in Report Creation
 - **Left Join (default)**: All records from first table + matching/null from second.
 - **Inner Join**: Only matching records between tables.
 - **Right Join**: All from second table + matching from first.
 - Test join types with small datasets before running full reports.
- Circulation Data Sources
 - For historical circulation, use **Combined Aged + Active Circulations** (avoids loss of data from anonymization after 30 days).
 - **Classic Item List**: Customization options (e.g., Dewey breakdowns).
 - **Full Item List**: More complete dataset, preferred by some users.
- Report-Building Best Practices
 - Begin with **simple templates**; add complexity gradually.
 - Use cloned templates for modifications when possible.
 - Explore datasets without saving to learn available fields and relationships.

Lindsay to continue working on the reports training slide deck and organize training sessions on the updated reporter interface.

Tech Services Interest Meeting Schedule: Our next meeting is scheduled for October 14th, and participants are invited to submit discussion topics to Lindsay or Allison. Reminders will be sent out the week before the meeting.