

Using Sitka Reports Module and KLF Shared Templates

The following information is excerpts that have been taken from Sitka's Evergreen Documentation and has been edited to match the scope of this project. A complete version of the documentation provided by Sitka can be accessed online at <http://docs.libraries.coop/sitka/>. You will find the full details for using the reports module in Section VI., Chapter 30.

The following steps use one example of executing a report in the Sitka Reports Module. The instructions can be applied to any report you choose to run in Sitka. You will need to make small modifications that will be specific to the report you are running.

ABOUT REPORTS

There are three main components used by the Reports Module: **Templates**, **Reports**, and **Output**. Each of these components must be stored in a folder. Folders can be private (accessible to your login only) or shared with other staff at your library or other libraries in your federation or lending zone. It is also possible to selectively share only certain folders and/or subfolders.

In the reports module, you will see that there are two parts to the folders pane which displays along the left-hand side of the screen. The **My Folders** section at the top contains folders created with your Sitka account. Folders that other users have created and shared appear in the **Shared Folders** section under the username of the sharing account. You can only view the contents of templates and clone templates that are found in the shared folders. You cannot make any changes to templates that are found in a shared folder.



If you would like to save a shared template that another user has created to your own **My Folders**, use the "Clone selected template" choice from the drop-down menu. Doing this will save the cloned template into your own folder and will make it quick for you to retrieve the template the next time you want to run the same report. When you create a new folder, you can also choose to share it which could be a great way to exchange other templates that you have found useful with KLF libraries (and others). A great way to do this would be to create a shared folder with a name that starts with KLF so that other KLF users can locate these templates easily in the **Shared Folders** area.

STEP 1: CREATING FOLDERS

Whether you are creating a report from scratch or working from a shared template you must first create at least one folder. The steps for creating folders are similar for each reporting function. It is easier to create folders for templates, reports, and output all at once at the beginning before you run any reports, though it is possible to do it before each step. It makes the process much easier to make all three of these folders before you begin. Once you have created a folder, it will always be accessible in your Evergreen account unless you delete it. This example demonstrates creating a folder for a template.

1. Click on **Templates** in the **My Folders** section.

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:

Share this folder:

Share with:

2. Name the folder. Select **Share** or **Do not share** from the drop down menu on the right. If you are going to share the folder for other KLF staff to use, start the folder name with **KLF** so that it makes it easier for everyone to find.
3. If you want to share your folder, select the grouping you want to share this folder with from the **Share with:** drop down menu. For sharing with other KLF members, select “BC Library Interconnect” from the drop down menu.

Create a new sub-folder. Folder type: Template

Folder Name:

Share this folder:

Share with:

- BC Interlibrary Connect
- Sitka
- BC Public Libraries
- BC Interlibrary Connect

4. Click **Create Sub Folder**, and then **OK** on the confirmation prompt.
5. Next, create a folder for the reports to be saved to. Click on **Reports** in the **My Folders** section.
6. Repeat steps 2-4 to create a Reports folder, using the same name as you used when you created the Templates folder.
7. Finally, you need to create a folder for the report’s output to be saved in. Click on **Output** in the **My Folders** section.
8. Repeat steps 2-4 to create an Output folder, using the same name as you used when you created the Templates and Reports folders.

Using a parallel naming scheme for folders in Templates, Reports, and Output helps keep your reports organized and easier to find.

The folders you have just created will now be visible by clicking the arrows in **My Folders**. The name that appears in brackets after the folder name indicates who the folder is shared with. For example, KLF Project Templates (BC ILC) is shared with the libraries that are part of BC Interlibrary Connect. If it is not a shared folder, there will be nothing after the folder name. You may create as many folders and sub-folders as you like.



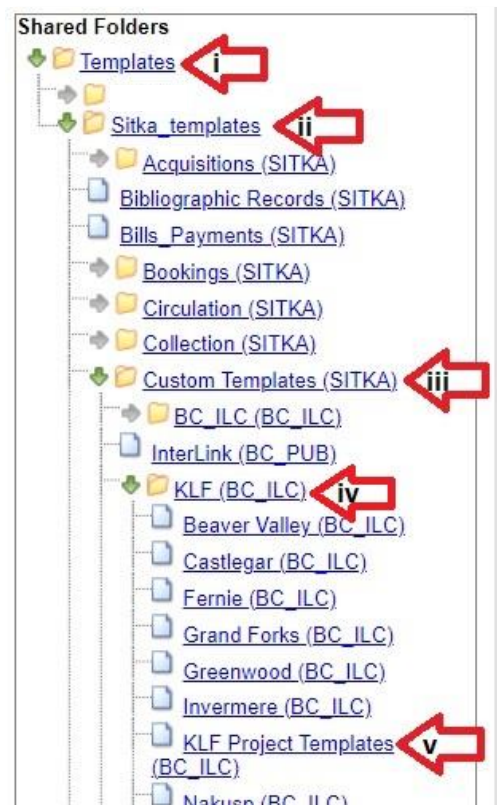
Clicking the blue text of a folder name displays the contents of the folder in the right pane. Clicking the arrow in front of a folder name displays its subfolders.

STEP 2: CLONE A TEMPLATE FROM A SHARED FOLDER

To use a shared template created by another user to generate a report, you will need to save a clone of the template to your own **My Folders** by using the "Clone selected template" choice from the drop-down menu. Doing this will save the cloned template into your own folder and will make it quick for you to retrieve the template the next time you want to run the same report again.

The following steps assume you have already created at least one template folder as described above. These steps outline how to clone the templates that are saved in the KLF Project Templates shared folder but they can be used to clone a template from any shared folder in the reports module.

1. In the bottom pane on the left-hand side, under **Shared Folders**:
 - i. Open the **Templates** folder by clicking on the grey arrow or folder icon. Do not click on the blue underlined hyperlink.
 - ii. Expand the **Sitka_templates** subfolder.
 - iii. Locate the sub-folder titled **Custom Templates (SITKA)** and click the grey arrow to expand.
 - iv. Find the folder called **KLF (BC_ILC)** and click the grey arrow.
 - v. Locate the shared templates folder titled **KLF Project Templates (BC_ILC)**.



- Now click the blue text “KLF Project Templates (BC_ILC)” to reveal the shared templates that are available for you to clone. These will appear on the screen to the right.

The screenshot shows the Evergreen interface. On the left, there are two folder trees: 'My Folders' and 'Shared Folders'. The 'Shared Folders' tree has 'KLF (BC_ILC)' selected. On the right, a table titled 'KLF Project Templates: created by Sitka_templates' is displayed. The table has columns for 'name', 'description', 'docs', 'ui', and 'create_time'. The first row is selected, and a dropdown menu is open over it, showing options: 'Create a new report from selected template', 'Clone selected template', and 'Delete selected template(s)'. The 'Limit output to' setting is currently set to '25'.

Select	All	None	name	description	docs	ui	create_time
<input checked="" type="checkbox"/>			CIRC: By shelving location and circ modifier: circ stats within time span	Number of circulations (including renewals) in time span that occurred at a library. Shelving locations not on the list will have 0 circulation.		WebStaff	2021-04-07 18:13
<input type="checkbox"/>			CIRC: Circulation returned count by checkin scan timeframe at selected library's workstations	Provides number of items checked in at all workstations of a library, incl. desk renewals within a specified time frame.		WebStaff	2021-04-23 19:22
<input type="checkbox"/>			CIRC: Circulation stats by patron type and home library with time span	Number of circulations (including renewals) occurred at a library by patron type; patron type not on the list will have 0 circulation.		WebStaff	2021-04-07 18:40
<input type="checkbox"/>			CIRC: Claimed returned Items belonging to selected library (by copy status change date)	Item is claimed returned within a date range and still has "claimed returned" status, excluding deleted items. Item and patron info is included.		WebStaff	2021-04-07 18:45

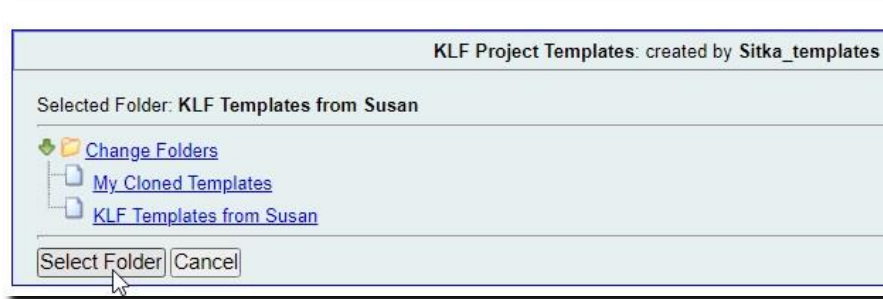
By default, Evergreen only displays the first 10 items in any folder. To view all content, change the “Limit output to” setting from 10 to All. The templates are listed in alphabetical order EXCEPT, for some reason, three Patron templates show up on the second page if you keep the display at 10.

- Select the template you wish to clone. In this example, we are cloning the CIRC: By shelving location and circ modifier template. From the drop down menu choose **Clone selected template**, then click **Submit**.

This screenshot is similar to the previous one, but the 'Limit output to' setting is now set to 'All'. The dropdown menu is still open, and the 'Clone selected template' option is highlighted with a mouse cursor. The table below shows the first four rows of the template list.

Select	All	None	name	description	docs	ui	create_time
<input checked="" type="checkbox"/>			CIRC: By shelving location and circ modifier: circ stats within time span	Number of circulations (including renewals) in time span that occurred at a library. Shelving locations not on the list will have 0 circulation.		WebStaff	2021-04-07 18:13
<input type="checkbox"/>			CIRC: Circulation returned count by checkin scan timeframe at selected library's workstations	Provides number of items checked in at all workstations of a library, incl. desk renewals within a specified time frame.		WebStaff	2021-04-23 19:22
<input type="checkbox"/>			CIRC: Circulation stats by patron type and home library with time span	Number of circulations (including renewals) occurred at a library by patron type; patron type not on the list will have 0 circulation.		WebStaff	2021-04-07 18:40
<input type="checkbox"/>			CIRC: Claimed returned Items belonging to selected library (by copy status change date)	Item is claimed returned within a date range and still has "claimed returned" status, excluding deleted items. Item and patron info is included.		WebStaff	2021-04-07 18:45

- Choose the folder where you want to save the cloned template, then click **Select Folder**. Only template folders created with your account will be visible.



- The cloned template opens in the template editor. Before saving, edit the Template Name and Description to your liking and then click **Save Template**. It will be saved into the folder that you just selected.

Before you save the template, you can also choose to modify the template by adding, removing, or editing fields and filters as described in [Chapter 37, Creating Templates](#). However, it is not necessary to make any modifications for the template to work as is.

- Click **OK/Continue** in the confirmation window. The cloned template is now saved in your **My Folders** in the Reports Module. This is where you will no access the template to create a report.

STEP 3: CREATING A REPORT FROM A CLONED TEMPLATE

Now you are ready to run a report from the template you have created.

- Find the cloned template you just created in the **Templates** folder. In the **My Folders** section, click the arrow next to **Templates** to expand this folder and select the folder where you saved your cloned template. (ie My Cloned Templates). Any saved templates will appear as a list on to the right.
- Select the check box in front of template you wish to use and then select **Create a new report from selected template** from the drop down menu. Click **Submit**. A window will now open for entering the report definitions.



3. Complete the first part of report settings.

- a. Template Name, Creator, and Description are for informational purposes only. These are hard coded when the template is created and cannot be changed here.
- b. **Report Name** is required. Reports stored in the same folder must have unique names.
- c. **Report Description** is optional but may help distinguish among similar reports.
- d. **Report Columns** lists the columns that will appear in the output. This is derived from the template and cannot be changed during the report definition.
- e. In this example, the **Pivot Label Column** is optional and **Pivot Data Column** only has one choice which is prefilled. Pivot tables are a different way to view data. If you currently use pivot tables in MS Excel, it is better to select an Excel output and continue using pivot tables in Excel. Please note that Pivot tables are suitable to some result data only.
- f. You must choose a **Report Folder** to store this report definition. These will be folders you created at the very start in your **My Folders**. Click on the desired folder to select it and the name of the folder will be filled in beside **Selected Folder**, in this case “My Cloned Templates” is where this report definition will be saved.

Template Name:	CIRC: By shelving location and circ modifier: circ stats within time span (clone)
Template Creator:	SusanJones
Template Description:	Number of circulations (including renewals) in time span that occurred at a library. Shelving locations not on the list will have 0 circulation.
Report Name:	<input type="text" value="Circ March-Now 2021"/>
Report Description:	<input type="text"/>
Report Columns:	Checkout Library Copy Owning Library Shelving location Circ Modifier Circ count
Pivot Label Column:	-- Select One (optional) --
Pivot Data Column:	Circ count
Choose a folder to store this report definition:	Selected Folder: KLF Reports from Susan Report Folders KLF Reports from Susan My Cloned Templates

4. Next

it is time to select the values that will be used for producing the report.

- a. Combined Aged and Active Circulations -> Circulating Library
 This is where you select the checkout library that you are generating a report for. Highlight a library from the list on the right, then click Add. The library will appear in the box below.
- b. Combined Aged and Active Circulations -> Checkout Date/Time
 Use the calendar widget to set a timeframe for the circulation. The report instructs you to enter the earlier date in the upper box. Use Relative Date for recurring reports.

Column	Transform	Action	User Params
Combined Aged and Active Circulations -> Circulating Library <u>This is Checkout Library. Highlight a library, then click Add.</u>	Raw Data	In list	BONE BHA BH BHH BIN Add/Del BHH
Combined Aged and Active Circulations -> Checkout Date/Time <u>Use the calendar widget to choose dates. Earlier date in the upper box. Use Relative Date for recurring reports.</u>	Date	Between	Real Date <input type="text" value="2021-03-01"/> - And - Real Date <input type="text" value="2021-04-08"/>

5. Complete the Output Options in the bottom portion of the report definition interface as follows:
 - a. Select one or more output formats. In this example the report output will be available as an Excel spreadsheet, an HTML table (for display in the staff client or browser), and as a bar chart. Please note that charts are suitable to some result data only.
 - b. If you want the report to be recurring, check the Recurring Report box and select the Recurrence Interval as described in [Chapter 35, Running Recurring Reports](#).
 - c. Select **Run as soon as possible** for immediate output. It is also possible to set up reports that run automatically in the future.
 - d. The email address is optional. A completion notice and a link to a password-protected report output will be sent to the email if you add one. You can enter a different multiple addresses, separated by commas, if you would like to send the link to others.
 - e. Select a folder for the report's output. You will be able to choose from any of the folders that you created at the start of the process for your Output Folder. When the report has been generated, you will be able to open the results from this folder.

6. Click **Save Report**. You will get a confirmation dialogue box that the action succeeded. Click **OK**.

Once saved, the reports will stay there forever unless you delete them. When a report is deleted all the linked output files will be deleted, too.

STEP 4: VIEWING REPORT OUTPUT

Once a report is finished, the output is stored in the **Output Folder** that you selected and it will remain there until it is manually deleted. Evergreen sends an email with a link to access the output if you entered an email address while setting up the report.

1. To view the report output from the Reports Module, click on the arrow in front of **Output** in **My Folders** to expand the folder. Click on the folder where you just saved the report output and any reports saved in this folder will display on the right-hand side of the screen.

- Select the check box in front of the report you want to view. At the top of the pane, **View report output** will be the default selection in the drop down menu. Click **Submit**.

The screenshot shows a web interface with a left sidebar and a main content area. The sidebar has 'My Folders' and 'Shared Folders' sections, both containing 'Templates', 'Reports', and 'Output' folders. The main content area has a header with 'Manage Folder Contents' and 'Manage Folder'. Below the header, it says 'KLF Output from Susan: created by NicolePawlak'. There is a dropdown menu set to 'View report output' and a 'Submit' button. Below this, there are two sections: 'Limit output to 10' with 'Start', 'Prev', 'Next', and 'Pending Items' links, and 'No items to display'. A second section shows 'Limit output to 10' and 'Completed Items' with a table below it.

Select	All	None	report	run_time	complete_time	runner	email	folder	error_text	excel_format	html_format	csv_format
<input type="checkbox"/>			Circ March- Now 2021	2021-06-05 14:47	2021-06-05 14:47	SusanJones	susan@mylibrary.ca	3354		t	t	f

- A new tab will open for the report output. Select either Tabular Output or Excel Output. If Bar Charts was selected during report definition the chart will also appear. Depending upon the data, sometimes the default bar chart that first appears is not useful or the page may even be blank because the data cannot be displayed this way. Selecting Excel Output at the top will produce a report in Excel that you can adjust. In our example, the Excel report looks like this:

Checkout Library	Shelving location	Circ Modifier	Circ count
My Home Public Library	Adult Fiction	book	109
My Home Public Library	Adult Non-fiction	book	64
My Home Public Library	Adult Paperbacks	book	52
My Home Public Library	Adult Room	dvd	19
My Home Public Library	Adult Room	magazine	34
My Home Public Library	Audio Books	audiobook-cd	10
My Home Public Library	Book Club Sets	bookclub	48
My Home Public Library	Junior Fiction	book	20
My Home Public Library	Junior Non-fiction	book	35
My Home Public Library	Junior Paperback	book	78
My Home Public Library	Junior Room	audiobook-cd	3
My Home Public Library	Junior Room	dvd	4
My Home Public Library	Kids Room	audiobook-cd	1

LIST OF TEMPLATES IN SHARED FOLDER

Based on the information collected in the survey for this project, I have cloned the following 13 report templates from the ones provided by SITKA. These were the most popular requests that were mentioned by survey respondents who wanted to be able to generate information about these topics. These templates have been placed in a shared folder called **KLF Project Templates (BC_ILC)** that can be found in the **Reports Module** in the **Shared Reports** pane and inside the folder named **NicolePawlak**.

This list is just a small snapshot of the many templates that are available and ready to be cloned. The templates have been sorted by topic to make it easier for you to search for a template that you need. There is also a search feature when looking for a template where you can enter a key word and generate a list of templates that mention that word in some part of the file. As you get more comfortable using the Reports Module, explore the other SITKA templates to discover more tools that will help you with your reporting needs.

TEMPLATE NAME		DESCRIPTION OF TEMPLATE OUTPUT
CIRCULATION TEMPLATES		
1	CIRC: By shelving location and circ modifier: circ stats within time span	Number of circulations (including renewals) in time span that occurred at a library. Shelving locations not on the list will have 0 circulation.
2	CIRC: Circulation returned count by checkin scan timeframe at selected library's workstations	Provides number of items checked in at all workstations of a library, incl. desk renewals within a specified time frame.
3	CIRC: Circulation stats by patron type and home library with time span	Number of circulations (including renewals) occurred at a library by patron type; patron type not on the list will have 0 circulation.
4	CIRC: Claimed returned Items belonging to selected library (by copy status change date)	Item is claimed returned within a date range and still has "claimed returned" status, excluding deleted items. Item and patron info is included.
5	CIRC: Monthly circulation by circulation modifier	Number of circulations (including renewals) that occurred at a library. Circulation modifiers not on the list will have 0 circulation. That item's owning library is not your library means the item was checked out or renewed at your library, or your library's patron borrowed other library's items then renewed them on OPAC. The renewal counts are included in this report.
COLLECTION TEMPLATES		
6	COLLECTION: Newly catalogued copies within time frame	Excludes deleted record or pre-cat items.

7	COLLECTION: Status of copies with selected copy status set within time frame	You may use this template to list items with Missing, Lost or On Order, etc. status. Exclude deleted items.
INVENTORY TEMPLATES		
8	INVENTORY: Items list by shelving location and status	Lists title, author, barcode, and call number for catalogued items. Choose at least one owning library, shelving location, and copy status. Excludes deleted items.
PATRON TEMPLATES		
9	PATRON: Active patron count by patron home library and profile	Count patrons who checked out or renewed item(s) at your library between the dates that you select.
10	PATRON: Patron count by one stat cat	Based on home library. Patrons without the stat cat are excluded so if your library does not assign the statistical categories to patron registrations, this report will not provide you with any results.
11	PATRON: Patron list by expiration date	List of patrons with expiration date within time span.
12	PATRON: Total patron count	Total patron count at time of report, listed by patron type.
WEEDING TEMPLATE		
13	WEEDING: Copies circulated fewer times since a selected date	Choose one or more owning libraries and shelving locations. Only shelving locations for your login location and its parent library system can be selected; for multi-branch library systems using non-shared shelving locations, run separate reports for each branch.

*PLEASE NOTE: The SITKA default is to limit output to 10 templates per page. To view all 13 templates, either adjust the toggle to limit output to ALL or navigate to the second page to see the last 2 templates. For some reason, the templates are in alphabetical order except for the two PATRON templates that show up on the second page when the list is limited to an output of 10.