



Reports Practice Exercises

Modifying Existing Templates

Reporter permissions are required for this exercise. Permissions can be requested for the live server by completing the Reporter Privacy Waiver -

<https://bc.libraries.coop/support/sitka/reporter-privacy-waiver/>

Accounts with reporter permissions are available for use on the training server -

<https://bc.libraries.coop/docs/sitka-training-server-access/> (login required to access)

Exercise 1 → Clone a Template and Run a Test Report

It is usually faster to modify an existing template rather than create a new template from scratch. We recommend that you clone an existing template and run the report first in order to determine what changes need to be made.

1. Find and clone the Sitka report template '**Overdues Within Time Span - General (Based on Checkout Library)**'. Look under *Shared Folders -> Templates -> Greenland_templates -> Circulation -> Overdue and others*
2. Run the Report
 - a. For the the report settings you can enter
 - i. Use the calendar widget to choose dates. Earlier date in the upper box
 - first box enter - 1900-01-01
 - second box enter - today's date
 - ii. Select values for the **Circulating Library**, click on the appropriate library, click *Add*
3. View the Report Output
4. Decide on required changes

Exercise 2 → Remove Display Fields

1. In the report template editor (accessed by cloning the template) select the display field you wish to remove.
 - a. Select **Evening Phone**
2. Click *Actions -> Remove Field*
3. Repeat for all fields you wish to remove
 - a. Remove **Owning Library**
 - b. Remove **Other Phone**

Note: Removing displayed fields usually does not affect the result set. But some fields may contain important information and removing them may confuse the results. Usually such fields are explained in the template Description. Be cautious when you delete such fields.

Exercise 3 → Rename Display Field Column Labels

1. In the report template editor (accessed by cloning the template) select the display field you wish change the column label for.
 - a. Select **Checkout Date / Time**
2. Click *Actions -> Change Column Label*
3. Change the text to **Checkout Date** and click *OK/Continue*

Exercise 4 → Change the Display Fields Order

1. In the report template editor (accessed by cloning the template) select the display field you wish move.
 - a. Select **Item Barcode**
2. Click *Actions -> Move Field Up*
3. Repeat this until **Item Barcode** is listed first
4. Move **Patron Barcode** down the list
5. Click *Actions -> Move Field Down*

Note: Right clicking on line will also bring up the actions menu.

Exercise 5 → Add a New Display Field

1. In the report template editor (accessed by cloning the template) add **Patron Type** as a display field
 - a. Click on the arrow beside **Circulation** in the top left pane.
 - b. Click on the arrow beside **Patron**
 - c. Click on **Main (Profile) Permission Group**
 - d. From the center pane select **Group Name**
 - e. Click *Add Fields* (found under the Display Fields tab)
2. Change the Column Label to **Patron Group** (see Exercise 3)

Exercise 6 → Add a Filter

1. In the report template editor (accessed by cloning the template) add **Patron Type** as a filter
 - a. Click on the arrow beside **Circulation** in the top left pane.
 - b. Click on the arrow beside **Patron**
 - c. Click on **Main (Profile) Permission Group**
 - d. From the center pane select **Group ID**
2. Click *Add Fields*

Exercise 7 → Change the Operator

1. In the report template editor (accessed by cloning the template) change the operator for **Group ID**
 - a. Select **Group ID**
2. Click *Actions -> Change Operator*
3. Choose **In List** from the drop down menu
4. Click *OK/Continue*

Exercise 9 → Save the Template and Run the Updated Report

1. Update the template name and description to reflect the changes you've made to the template
2. Click *Save Template*
3. Run a report using the new template and compare the report output to the report you ran in Exercise 1

More information can be found in the Reports section of Sitka's Evergreen Documentation
http://docs.libraries.coop/sitka/reports_2.html