



Reports for Beginners

Tips

- Using a parallel naming scheme for folders in *Templates*, *Reports*, and *Output* helps keep your reports organized and easier to find.
- Real vs Relative Dates – Use Relative Dates whenever you create a recurring report
- Run a test report before setting up a recurring report to ensure you'll get the expected results
- Shared Folders - Bracketed after the folder name, is the name of with whom the folder is shared. For example, Circulation (ZSP) is shared with both branches of Coopville Public Library. If it is not a shared folder, there will be nothing after the folder name.

Resources

Sitka's Evergreen Training Manual - Reports Chapter

Detailed reports instructions and Terminology - http://docs.libraries.coop/sitka/reports_2.html

Reports Videos

<https://www.youtube.com/playlist?list=PLdwlgwBNnH4pg4MFwQK1nU8BDDBazZdav>

Reports Exercises

https://bc.libraries.coop/wp-content/uploads/2014/01/2019_Reports-Practice-Exercises-Getting-Started.pdf

These exercises can be completed on the live server or on Sitka's Evergreen training server which is available to all Sitka libraries. This is a safe environment in which to train new staff or experiment with features your library may not currently be using.

Privacy Waiver

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