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.
- Shared Folders - Bracketed after the folder name, is the name of with whom the folder is shared. For example, Circulation (MPL) is shared with all staff of Maple Public Library. If it is not a shared folder, there will be nothing after the folder name.
- Real vs Relative Dates – Use Relative Dates whenever you create a recurring report
- Monthly Recurring Reports – Always set the report to run on the 1st of the next month
- Run a test report before setting up a recurring report to ensure you'll get the expected results
- Use the report output URL to easily share your report output with other library staff who have reporter permissions

Resources

Sitka's Evergreen Training Manual
Reports Section - http://docs.libraries.coop/sitka/_reports.html
Sitka Templates - http://docs.libraries.coop/sitka/_shared_sitka_templates.html
Report Definition Examples - http://docs.libraries.coop/sitka/_report_definition_examples.html
Use these examples to set up your own recurring reports. Have a Sitka template you wish was included? Send a ticket to Co-op Support requesting the template be added to the examples.

Reports Videos
https://www.youtube.com/playlist?list=PLdwlgwBNnH4pg4MFwQK1nU8BDDBazZdav

Privacy Waiver
Users requesting reporter access or the ability to view report output are required to sign the Privacy waiver. Please ensure that staff accounts requiring Reporter permissions contain the following: First Name, Last Name, Email, Phone Number, and Address. Incomplete staff accounts will not be granted Reporter permissions. - https://bc.libraries.coop/reporter-privacy-waiver/