



Sitka

More Than Just Cloning: Editing Report Templates

Tips

- Start by finding a template in Sitka_templates that is as close to what you want as possible
 - What type of data are you looking at?
 - Are you looking for a count or a list?
 - What do you want to be able to filter on?
 - What information is critical to include in the output so that you can work with the output?
- ALWAYS clone a template into your own folders before running a report from it
- Update the template name and description if you make changes to the display fields or filters
- Core Sources
 - NEVER change the core source when editing a template
- Display Fields
 - Rename, reorder, and remove display fields to change what shows in the report output
 - Generally you want to select text fields over ID and org_unit fields
 - A link icon beside a field indicates a link to another database table. Expand the tree on the left to find the table.
 - Bibliographic record information such as title and author is found in the Simple Record Extracts table.
 - When using the Item core source the path is Item -> Call Number/Volume -> Bib Record -> Simple Record Extracts
- Filters
 - NEVER create a report template without a library filter
 - Filters in Sitka templates are designed to make the template as flexible as possible. You may want to hardcode filter values to reduce the steps involved in running report or make it easier for those with less reporter experience to run the reports
- Know Your Template Terminology
 - [Data Types](#)
 - [Transforms](#)
 - [Operators](#)
- Try things out! The worst that can happen is that you get an error when you try to run a report from your template.
- Check your templates, are you running old versions of Sitka templates? (Compare the create dates)

Documentation

- [Shared Sitka Templates](#)
- [Modifying Report Templates](#)
- [Report Template Editor](#)
- [Troubleshooting Report Templates](#)

Further Learning

- [Thanks for Nothing: Nullability Selection in Evergreen Reports](#) conference presentation
- [Evergreen Reports Interest Group](#)