



## Staff Tutorials

### Basic Evergreen Reporting

Outline by Mike Peters – Indiana State Library

Select elements courtesy S.K. Murphy – Georgia Public Library Service

### Introduction to Evergreen Reporting

- Evergreen is quite different from other reporting modules in proprietary ILS.
  - **Benefits**
    - Flexibility
    - Users can gather any data stored in Database and create queries
- Evergreen Returns exactly information that is requested but does not return it in a “pretty” form
  - No fancy multicolored charts, etc.
  - Excel/Open Office can be used to create custom graphs if desired
- To streamline day-to-day reporting Evergreen allows users to share and reuse templates to create reports PINES has shared over 50 templates created by the developers with Evergreen Indiana

### Permissions

- **By default reporting can only be run by two users**
  - **LocalAdmin**
  - **GlobalAdmin**
    - Administrators CAN grant permission to others
      - Add “RUN\_REPORTS” permission in the User Permissions Editor
      - Any staff member can view report OUTPUTS via the web



## Components of Reports

- Evergreen Reports are divided into three components:
  - **Template**
    - Defines the *type* of report that will be generated
  - **Report**
    - Created *from* a template to define a specific query for information
  - **Output**
    - Result of reports (CSV, HTML Charts, Excel .xls file)

## Organization

- **My Folders**
  - Users folders and report components
- **Shared Folders**
  - Folders you have chosen to share to your library, your system, or even the entire consortium.
- **Example**
  - A user may create a group of templates to gather circulation statistics. (s)he can create a subfolder under “Templates” called “Circ Stats.” (s)he should also create a “Circ Stats” folder under “Reports” and “Output”, and store reports and outputs created from the Circ Stats templates there. This is shown in the figure to the right.

