

POLL - Who is brand new to Evergreen reports?

Community demo servers: https://wiki.evergreen-ils.org/doku.php?id=community_servers

Login info: https://wiki.evergreen-ils.org/doku.php?id=qa:concerto_logins

Orientation to Report interface

- My Folders - unique to your login. Need to click on arrow to expand, otherwise you'll be prompted to create a new folder.
- Shared Folders - the folders that have been shared by other users. Listed by user first, then broken down into Templates, Reports, and Output.
- Templates - where you start. These are the "bare bones" of your reports. Define the data you will get.
- Reports - after running your report, this is where your parameters are stored. Generally, you do not have to look here once the report is running
- Output - where the report output is stored.

Organization of templates

- Folders broken down by report type
- Reports named in a consistent scheme
- Reports named with a code at the end of the name

Display fields

- Standard columns for list reports
- This is Bibliomation's list:
 - https://docs.google.com/document/d/1NanD9yvc2hoA9U-9_6i3wbbxohgFRJjwslk_gaAt6nb8/edit?usp=sharing
- If you know where to get basic fields from, it can make your life a lot easier

Filters

- Timestamps
 - Use date transform
 - Operators
 - Between
 - On or before
 - On or after
 - Before
 - After
- In List Operator
 - Use an ID data type to generate a list
- Aggregate filters
 - Need to transform to an aggregate output type (count, sum, etc)
 - Click on a non-aggregate data type to go back to Base Filters
- Boolean
 - Set value true or false
 - Always want to use deleted = false as a filter, unless you're reporting on deleted items

Report that shows stat cats

- You need to find out the ID of the stat cat you want to report on

- Stat Cat List
 - Statistcal Category Entry Copy Map
 - Filter:
 - Owning-copy > Is deleted? (Value = False)
 - Display fields
 - Stat_cat > Stat Cat ID
 - Stat_cat > Name
 - Stat_cat > Owning Library > Name (change to Stat Cat Owning Library)
 - Stat_cat_entry > Entry ID
 - Stat_cat_entry > Value (change to Entry Name)
 - Stat_cat_entry > Entry Owner > Name (change to Entry Owning Library)
 - Owning copy > Copy ID (transform = count distinct, changed to # of copies)
- Once you have the ID of the stat cat, you should use the stat cat as a filter in your item report
 - Filter: Item > Statistical Category Entry Copy Map > stat_cat > Stat Cat ID (value = the ID of your target stat cat)
 - Display Field: Item > Statistical Category Entry Copy Map > stat_cat_entry > Value (changed to name of stat cat, ex. State Circ Code)

Joins

- <https://www.w3resource.com/PostgreSQL/postgresql-join.php>

Count circs by item or by for items in a shelving location by date range

- Easy to set up if you only want to see items that circled in that date range
- Becomes harder when you want to see all items. Joins don't work very well in this example because items may have circulated outside that time frame. So it's not that they aren't in the circulation table, but they don't match the query you're doing on that table. Need to actually join two queries or use coalesce function in SQL - reporter can't do that.

Uncaptured holds example

- Good example for nullability
- If you want to display your item info in the report, you should do an INNER join on the copy table