

Report Templates for Stat Cats

Notes:

- These report templates come from 3.14.4(ish) and the new angular reporter so some table names may be different than in earlier versions of Evergreen.
- When not specified the Transform is Raw Data.

Title & Item Count by Shelving Location & One Stat Cat

Description: Counts the catalogued titles (unique bib records) and individual items (barcodes) owned when the report is run, listed by shelving location & Stat Cat entry. Excludes deleted and pre-cat items.

Source = Item

Display Fields

- Shelving Location - Item -> [Both Required] Shelving Location -> Name
- Stat Cat Name - Item -> [Both Required] Stat-Cat entry maps -> [Both Required] stat_cat -> Name
- Stat Cat Entry - Item -> [Both Required] Stat-Cat entry maps -> [Both Required] stat_cat_entry -> Value
- Owning Library - Item -> [Both Required] Call Number/Volume -> [Both Required] Owning Library -> Name
- Circulating Library - Item -> [Both Required] Circulating Library -> Name
- Title Count - Item -> [Both Required] Call Number/Volume -> [Left Required] Bib Record -> Record ID
 - Transform = Count
- Item Count - Item -> Item ID
 - Transform = Count

Filters

- Call Number/Volume ID - Item -> [Both Required] Call Number/Volume -> Call Number/Volume ID
 - Operator = Not In List
 - Filter Value = -1
- Is Deleted - Item -> Is Deleted
 - Operator = Equals
 - Filter Value = False
- Organizational Unit ID - Item -> [Both Required] Circulating Library -> Organizational Unit ID
 - Operator = In List
 - Hint = Select your library.
- Stat Cat ID - Item -> [Both Required] Stat-Cat entry maps -> [Both Required] stat_cat -> Stat Cat ID
 - Operator = Equals
 - Hint = Select one Statistical Category.

Stat Cat: Items with selected Stat Cat Entry

Description: List title, author, barcode, call number, publication year, total circ count, price, circ modifier, shelving location, active date and last checkout date for items with selected statistical category entry. Remove the displayed fields if you do not need them when cloning the template.

Source = Statistical Category Entry Item Map

Display Fields

- Stat Cat Entry - Statistical Category Entry Item Map -> [Left Required] stat_cat_entry -> Value
- Stat Cat Name - Statistical Category Entry Item Map -> [Left Required] stat_cat -> Name
- Barcode - Statistical Category Entry Item Map -> [Left Required] owning_copy -> Barcode
- Active Date/Time - Statistical Category Entry Item Map -> [Left Required] owning_copy -> Active Date/Time
- Call Number - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Call Number/Volume -> Call Number Label
- Shelving Location - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Shelving Location -> Name
- Circ Modifier - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Circulation Modifier -> Name
- Title - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Call Number/Volume -> [Left Required] Bib Record -> [Left Required] Simple Record Extracts -> Title Proper (normalized)
- Author - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Call Number/Volume -> [Left Required] Bib Record -> [Left Required] Simple Record Extracts -> Author (normalized)
- Publication Year - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Call Number/Volume -> [Left Required] Bib Record -> [Left Required] Simple Record Extracts -> Publication Year (normalized)
- Price - Statistical Category Entry Item Map -> [Left Required] owning_copy -> Price
- Total Circulation Count - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Total Circulations -> Total Circulation Count
- Last Circulation Date - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Last Circulation Date -> Last Circulation Date

Filters

- Value - Statistical Category Entry Item Map -> [Left Required] stat_cat_entry -> Value
 - Operator = In List
- Stat Cat ID - Statistical Category Entry Item Map -> [Left Required] stat_cat -> Stat Cat ID
 - Operator = Equals
- Organizational Unit ID - Statistical Category Entry Item Map -> [Left Required] owning_copy -> [Left Required] Circulating Library -> Organizational Unit ID
 - Operator = In List
 - Hint = Select your library.
- Is Deleted - Statistical Category Entry Item Map -> [Left Required] owning_copy -> Is Deleted
 - Operator = Equals
 - Filter Value = False

Count of New Patrons Registered within a Time Frame by Profile Group then by Stat Cat

Description: Incl. patrons that have been since deleted. 1 means deleted, 0 not.

Source = ILS User

Display Fields

- Home Library - ILS User -> [Left Required] Home Library -> Name
- Main (Profile) Permission Group - ILS User -> [Left Required] Main (Profile) Permission Group -> Group Name
- Stat Cat Name - ILS User -> [Left Required] Statistical Category Entries -> [Left Required] Statistical Category -> Name
- Stat Cat Value - ILS User -> [Left Required] Statistical Category Entries -> Entry Text
- Patron Count - ILS User -> User ID
 - Transform = Count
- Is Deleted - ILS User -> Is Deleted

Filters

- Record Creation Date/Time - ILS User -> Record Creation Date/Time
 - Transform = Date
 - Operator = Between
 - Hint = Use the calendar widget to choose dates (inclusive). Earlier date in the first box. Use Relative Date for recurring reports.
- Home Library - ILS User -> Home Library
 - Operator = In List
- Stat Cat ID - ILS User -> [Left Required] Statistical Category Entries -> [Left Required] Statistical Category -> Stat Cat ID
 - Operator = Equals
 - Hint = Select a Stat Cat.

Patron Count by Profile Group and one Stat Cat

Description: Excludes patrons without the stat cat.

Source = ILS User

Display Fields

- Home Library - ILS User -> [Left Required] Home Library -> Name
- Main (Profile) Permission Group - ILS User -> [Left Required] Main (Profile) Permission Group -> Group Name

- Stat Cat - ILS User -> [Left Required] Statistical Category Entries -> [Both Required] Statistical Category -> Name
- Stat Cat Entry - ILS User -> [Left Required] Statistical Category Entries -> Entry Text
- Patron Count - ILS User -> User ID
 - Transform - Count

Filters

- Home Library - ILS User -> Home Library
 - Operator = In List
 - Hint = Select your library.
- Is Deleted - ILS User -> Is Deleted
 - Operator = Equals
 - Filter Value = False
- Privilege Expiration Date - ILS User -> Privilege Expiration Date
 - Transform = Date
 - Operator = After
 - Hint = To exclude expired patrons, use the calendar widget to choose today. To include expired patrons, type in 1900-01-01
- Stat Cat ID - ILS User -> [Left Required] Statistical Category Entries -> [Both Required] Statistical Category -> Stat Cat ID
 - Operator = Equals
- Privilege Expiration Date - ILS User -> Privilege Expiration Date
 - Operator = Equals

Count of Patron Stat Cat Values

Description: This template will give you a list of all the patron statistical categories and values for your library and display a count how many patrons have each value assigned to them.

Source = User Statistical Category

Display Fields

- Stat Cat Name - User Statistical Category -> Name
- Entry Value - User Statistical Category -> [Left Required] Entries -> Entry Value
- Count - User Statistical Category -> [Left Required] Entries -> Entry ID
 - Transform = Count

Filters

- Owning Library - User Statistical Category -> Owning Library
 - Operator = In List
 - Hint = Select your library.

List of New Patrons Registered by Month (with stat cat)

Description: Includes accounts that have since been deleted.

Source = ILS User

Display Fields

- Is Deleted - ILS User -> Is Deleted
- Home Library - ILS User -> [Left Required] Home Library -> Organizational Unit ID
- Main (Profile) Permission Group - ILS User -> [Left Required] Main (Profile) Permission Group -> Group Name
- Patron Barcode - ILS User -> [Left Required] Current Library Card -> Barcode
- Last Name - ILS User -> Last Name
- First Name - ILS User -> First Name
- Email Address - ILS User -> Email Address
- Stat Cat Entry - ILS User -> [Left Required] Statistical Category Entries -> Entry Text
- Patron Creation Date/Time - ILS User -> Record Creation Date/Time
 - Transform = Date

Filters

- Record Creation Date/Time - ILS User -> Record Creation Date/Time
 - Transform = Month (can use Between instead for a specific time frame)
 - Operator = In List
- Stat Cat ID - ILS User -> [Left Required] Statistical Category Entries -> [Left Required] Statistical Category -> Stat Cat ID
 - Operator = Equals
- Home Library - ILS User -> Home Library
 - Operator = In List
 - Hint = Select your library.