Session Notes: Quick Reports

The initial release of Quick Reports is available at:

<http://git.evergreen-ils.org/?p=contrib/pines/report-creator.git;a=summary>

The docs folder contains:

1. Installation Instructions
2. CSS Customization Quick Start Guide
3. Admin Instructions (for the reports expert who will be creating the templates and linking them up from Quick Reports)
4. End User Instructions (for the library staff who will be running the reports)

Presentation Notes:

* Background
  + Quick Reports was developed by PINES / Emerald Data Networks to meet the needs of the PINES consortium, which supports 284 libraries in 53 regional library systems across Georgia.
  + Reports expertise is not available at all locations, because even with training, the Reporter can be overwhelming to inexperienced users.
  + PINES support staff were spending an extraordinary amount of time responding to reports questions and had been considering another staff person full-time just to support reports.
* Solution
  + We worked with a group of library staff to determine requirements for workflow, access, and list of templates.
  + The final product is a simplified web-based access point to the Evergreen Reporter.
  + Since it is a web-based interface and the work is done on the server side, you can run these reports from any web-enabled phone.
  + Templates are carefully considered and created in the Evergreen Reporter, and the template ID for each one is added to Quick Reports. Templates are only created by the PINES administrators (not by system library staff), so the number of templates is kept to a minimum.
  + Since all templates are created by PINES administrators, it is easier to do quality control and troubleshooting rather than trying to reverse engineer what library staff have created.
  + We shared the template folder that the templates are in with the entire PINES consortium, so if someone does want to clone and modify one of them, they can.
  + Makes use of the existing permission structure to run and view reports, with one additional permission (ADMIN\_SIMPLE\_REPORTS) for the person/people who are actually creating / importing the templates.
* We added a link from our staff client home page so staff can click on it to open a browser.
* Demo
  + Five basic reports categories: Bills, Circulation, Holds, Items, Patrons
  + The pre-set categories match to folders of the same names, so users do not have to create their own folders or select folders for the output to go into.
  + Template types are broken down into Counts and Lists to make it easier for users to select the type of information they are seeking.
  + You can save a report template that you are filling out as a Draft and return to it later.
  + You can modify descriptions and documentation URLs and template titles.
  + You can easily run a report again with modified information.
  + When you look under ‘My Quick Reports’ to see your pending and completed reports, it is easy to tell what report template the report was based on.
* Response
  + To train library staff, we create a short video demonstration and provided written instructions. We’ve also added it to our other reports training classes.
  + After nearly a year of use, reports help desk tickets have dropped off significantly, and many of the tickets that still come in can be directed to one of the existing templates in Quick Reports.
  + Library staff are thrilled with it and feel more confident and empowered.
  + When libraries all use one of these reports instead of creating their own, we know that their results are going to be consistent with each other.
  + We no longer feel the need to hire an additional reports person and can focus on other projects.
  + We have had fewer requests for reports training.
  + Since rollout, we’ve identified a few additional templates and added them, but the initial set of templates we built meet most library needs.

For additional information:

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