

Report printing set-up

Templates

The template specifies the fields to be displayed in the result file (Displayed Fields) and the fields on which conditions can be applied (Filter Fields). Templates can be used over and over again.

Reports

This process is commonly known as defining a report, running a report or setting up a report. The process schedules the report's run-time and frequency (one time only or on a regular basis), selects the output file format(s) and designates who will receive email completion notifications when the report is finished. The information provided during this step is saved in a file called "Report" on Evergreen. This file contains the template information **and** the value for each filter.

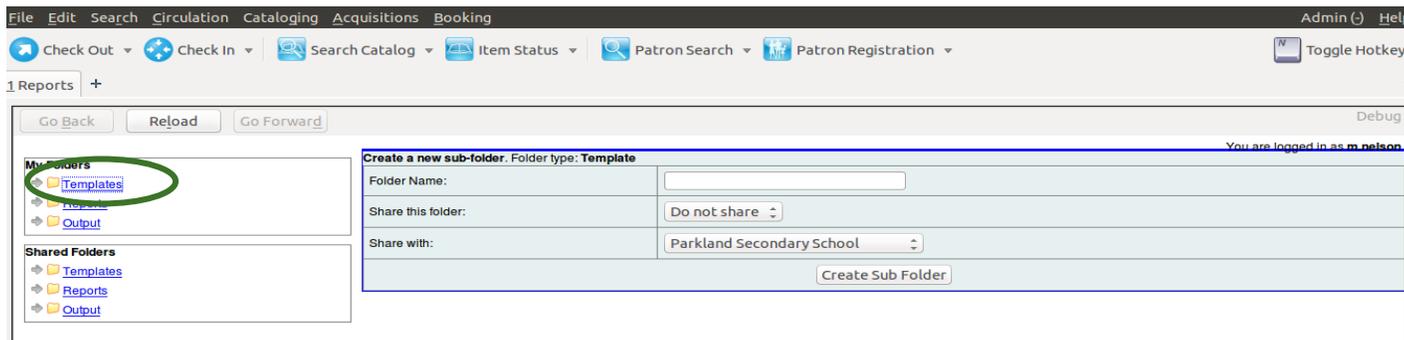
Output

When a report starts to run, the program goes through the database and gathers the records that meet the conditions specified in the template into a file in the selected format(s). This is the Output file that contains the result records.

Set-up

First, you must create at least one *Template*, *Report*, and *Output* folder. You can have as many subfolders as you need and can name them in any way that works for you.

1. Click on *Admin > Local Admin > Reports*



2. Click on Templates in the My Folders section.
3. Fill in your folder information:
 - Folder name: Items out
 - Share this folder: Share
 - Share with: Your school
4. Click *Create Sub Folder*, and then *OK* on the confirmation prompt
5. Repeat this process to create a Reports subfolder and an Output subfolder
 - a. Click on Reports, title will pre-populate, click OK
 - b. Click on Output, title will pre-populate, click OK