

Statistical Categories Editors

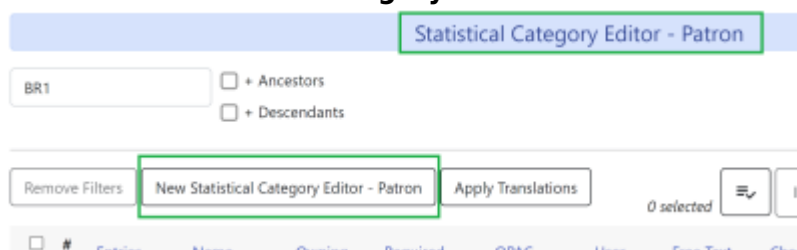
As of the 3.12 upgrade in February 2024, the Statistical Categories Editor interface is split up into two interfaces for Patrons and Items. These interfaces allow your library system to set up or edit locally defined statistical categories (aka StatCats) for items or patrons. These statistical categories can then be set when adding patrons or cataloging items and then used to generate reports on item usage or patron statistics. Use of statistical categories is entirely optional and governed by local needs (with the exception of the Patron StatCat for “Non-English as a Primary Language,” which is required by PINES policy). This page gives an overview of creating patron statistical categories. For information on item statistical categories, please see [Statistical Categories for Items](#).

Patron Statistical Categories

Library systems may choose to create Patron Statistical Categories to track customized types of information for their own patrons. Some libraries are using this feature to track how many patrons live in different congressional districts or how many juvenile patrons ride the school bus. Other libraries have found creative ways to use it, such as to track which staff member updated the patron record. Only staff members belonging to the library system that created the Patron Statistical Category will see the question/category when editing the patron record.

Creating a Statistical Category

1. In the Evergreen Staff Client, go to **Administration > Local Administration > Statistical Categories Editor - Patron**.
2. Click **New Statistical Category Editor - Patron**.



3. The editor will open, where you can set the following:
 - *Name*: This is what will appear in the patron's account.
 - *Owning Library*: Select the library for which the stat cat applies.
 - *Required*: Select this option if the category must be assigned a value when editing a patron's account.
 - *OPAC Visible*: Select this option if the category should be displayed in the patron's account in the OPAC.
 - *User Summary*: Select this option if the category and its value should be displayed in the patron summary view.
 - *Free Text*: Select this option if the user can supply their own value for the category in a patron's account.

- *Checkout Archive*: Select this option if the category and its values for the item should be archived with circulation data.
- *SIP Field*: Select the SIP field identifier that will contain the category and its value (if applicable).
- *SIP Format*: Specify the SIP format string (if applicable).

4. Click **Save**.



If you make a category *Required* and also disallow *Free Text*, make sure that you populate an entry list for the category so that the user may select a value. Failure to do so will result in an unsubmittable patron registration/edit form.

Creating Entries for a Statistical Category

Entries for patron stat cats are the values that will appear in the category's dropdown menu in the patron's account. To add entries for the stat cat:

1. Click the **Entries** link on the category's row.

Remove Filters

New Statistical Category Editor - Patron

Apply Translations

☐ #

[Entries](#)

[Name](#)

[Owning Library](#)

[Required](#)

[OPAC Visible](#)

[User Summary](#)

Filter ▾

Filter ▾

Filter ▾

Filter ▾

Filter ▾

Filter ▾

☐ 1

[Entries](#)

Monthly ...

BR1

Yes

Yes

Yes

2. Click **New Statistical Category Entry - Patron** and input the value and owning library.

Statistical Category Entry - Patron

BR1 ☐ + Ancestors ☐ + Descendants

Remove Filters **New Statistical Category Entry - Patron** Apply Translations 0 selected

#	Stat_Cat	Entry_Value	Entry_Owner
	Filter	Filter	Filter

3. Input the value and owning library, and then click **Save**.

Record Editor: Statistical Category Entry - Patron

Stat Cat	Monthly Newsletter
Entry Value	Entry Value...
Entry Owner	BR1
Entry ID	

Cancel Save

4. Repeat steps 2 through 3 until all values you would like to appear in the dropdown list for the stat cat are entered.
5. To return back to the main category page, click the **Return** button at the top right-hand corner of the screen.

Statistical Category Entry - Patron

Filters Applied: ["stat_cat": 2]

Return

Apply Translations 0 selected

Rows 10

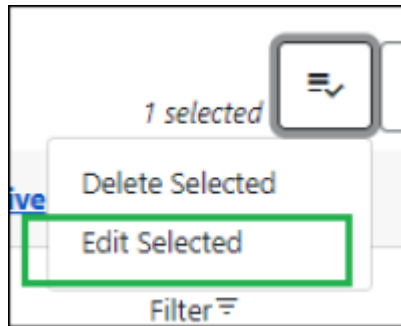
Entry_Value Entry_Owner Entry_ID

Editing a Statistical Category

After creating a stat cat, if you need to edit any of the fields, such as name or description:

1. Double-click the stat cat to open the editor form.
2. Make the desired changes.
3. Click **Save**.

OR you can click on the stat cat, click the actions menu, and click **Edit Selected**.

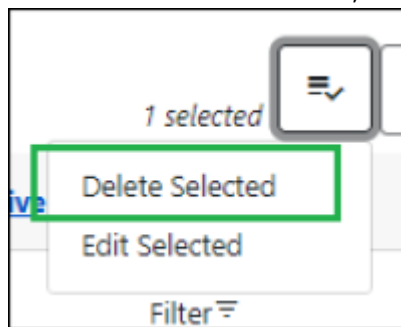


You are able to edit the attributes of a stat cat, but there is not yet the functionality to edit or delete the individual entries created for each stat cat.

Deleting a Statistical Category

To delete a stat cat:

1. Click on the stat cat.
2. Click on the actions menu, and click **Delete Selected**.



If a value for a stat cat has been recorded on a patron's account, the system will not allow the deletion of the stat cat.

Answering the Statistical Category Question

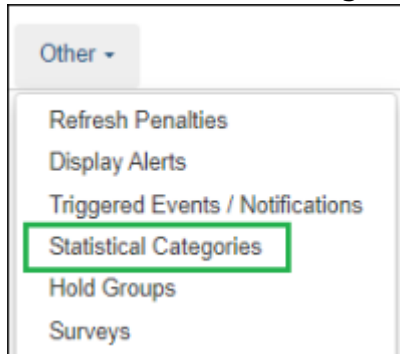
Your new Patron Statistical Category question/category will appear in the **Statistical Categories** section toward the bottom of the patron registration form and the edit patron form.

A screenshot of a form titled "Statistical Categories" in a green header. Below the header, there are two rows of labels: "Legacy Profile" and "Non-English Primary Language". To the right of these labels is a dropdown menu. The dropdown menu is currently open, showing the word "Spanish" as the selected option.

Once the field is populated, whether using the dropdown or inputting free text, click **Save**.

Viewing an Individual Patron's Statistical Categories

1. Open a patron account.
2. Click the **Other** button.
3. Choose **Statistical Categories**.



4. You will see the current answers / choices.

Reports

You may create reports on your system's custom statistical categories if needed. Here are a few pre-made templates in the reporter that may be helpful:

- List of Patrons by Permissions Profile and Statistical Category
- Patron Email Opt-In Statistical Category Report
- Monthly New Users by Demographic and Stat Cat

If you require assistance, please contact the [Help Desk](#) with details.

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