Add/Edit Statistical Categories

This interface allows your library system to set up or edit locally-defined statistical categories (aka StatCats) for copies or patrons. These statistical categories can then be set when adding patrons or cataloging copies and then used to generate reports on copy usage or patron statistics. Use of statistical categories is entirely optional and governed by local needs (with a single exception, noted below). The interface is available at:

Admin → Local Administration → Statistical Categories Editor

The list of existing statistical categories appears in the lower part of the screen, and includes whichever categories set for the "Focus Location" (changeable via the dropdown menu). There are two types of statistical categories, Patron and Copy:

Copy Statistical Categories

Once set, these can be applied to individual copies in the Item Attributes Editor, available to cataloging staff. The "Legacy CAT1" and "Legacy CAT2" categories were added to Evergreen to ensure continuity in reporting abilities from PINES' previous automation system.

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.

Create a Statistical Category

1. In the Evergreen Staff Client, click Administration.
2. Click Local Administration.
3. Click Statistical Categories Editor.
4. In the top portion of the screen you will see a section titled 'Create a new statistical category.'
5. Enter the Name (this will be what appears on the Edit Patron screen).
6. Select your Owning Library (usually the library system, but it could be a single branch if appropriate).
7. OPAC Visibility will usually be left as Off unless you specifically want patrons to be able to see it in their account information.
8. Change Type to Patron.
9. Decide whether the question should be Required (On) or not (Off) each time the patron's account information is edited. (If a staff member from a different library system edits the patron record, he

or she will not see the question.)

10. If Allow Free Text is On, a text box is displayed to the staff member when editing the patron account information.
11. If you wish to have a dropdown list of options for the staff member to choose from,
12. If Show In Summary is On, the most recent answer/category will appear in the patron summary info.
13. Leave SIP Field as 'No SIP Export.'
14. Click the Create new statistical category button.
15. The new category/question will appear on the list below (you may need to click on the Patron Statistical Categories link in the middle of the page to see it).
16. If you wish to add dropdown list options to your question/category, click the Add link on your question's row. Enter the value and click Create new entry. (If you want the form to default to one of the options, check the Default entry box when adding the desired option. Repeat this step until all options are entered.

Answering the Statistical Category Question

Your new Patron Statistical Category question/category will appear in the 'Statistical Categories' section on the new patron registration form and the edit patron form.

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. If you require assistance, please contact the [[https://help.georgialibraries.org|Help Desk] with details.