

# Report Guide

## *Number of Holds Placed by Staff vs. Patron based on Library*

### Purpose of the Report

This report shows the number of holds placed for individual patrons by specific users within a specified date range. This report does not include canceled holds.

### Running the Template

1. Enter a unique title in the "Report Name" field.

Template Description:	This report shows the number of holds placed for canceled holds. Displays: patron home library, request date range Filters: patron home library, request date range
Report Name:	<input type="text" value="Staff/Patron Holds 07/2020"/>

2. Select the folder where you wish to save the report.

Choose a folder to store this report definition:	Selected Folder: Circ (PBPL) <a href="#">Report Folders</a> <a href="#">Circ (PBPL)</a> <a href="#">Daily Cash</a>
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3. Select the Home Library.

Column	Transform	Action	User Params
Hold Request -> Hold User -> Home Library	Raw Data	In list	<div style="border: 1px solid black; padding: 2px;">           PBDC            PBPL            PLSK            PLSK-CK            PLSK-PL            Add Del            PBPL         </div>

4. Choose the Request Date/Time range. This can be done using relative dates or real dates.

Hold Request -> Request Date/Time	Date	Between	Real Date <input type="text" value="2020-07-01"/> - And - Real Date <input type="text" value="2020-07-31"/>
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- Select the type of file you want to receive in the end. (You'll need an Excel or CSV).

**Output Options**

- Excel Output
- CSV Output
- HTML Output
  - Bar Charts
  - Line Charts

- Select the folder where you wish the output file to be saved.

Choose a folder to store this report's output:

Selected Folder: Circ (PBPL)

- [Output Folders](#)
- [Circ \(PBPL\)](#)
- [Inventory](#)
- [Circ Report](#)
- [Discard/Weed Reports](#)
- [Daily Cash](#)
- [Kid's Collections](#)

## Viewing the Output

- Navigate to the folder where you saved the output file.
- Check the box next to your report.

Select <a href="#">All</a> <a href="#">None</a>	report	run_time	complete_time	runner
<input checked="" type="checkbox"/>	<a href="#">Staff/Patron Holds 07/2020</a>	2020-08-06 15:25	2020-08-06 15:25	<a href="#">pbadmin</a>

- Select "View Report" from the drop-down menu above and click Submit.

View report output

▼

Submit

- View the report results as a bar chart or table in the pop-up window or click on the link for "Excel output." This is what the tabular output will look like:

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Patron Home Library	Requesting User Permission	Request Date/Time	Requesting User Last Name	Requesting User First Name	Patron First Name	Patron Last Name	Count
Poplar Bluff Municipal Library	Cataloging Administrator	7	Poplar	Cataloging Admin	David	Haggett	9
Poplar Bluff Municipal Library	Cataloging Administrator	7	Poplar	Cataloging Admin	Jennifer	Gunn	1
Poplar Bluff Municipal Library	Cataloging Administrator	7	Poplar	Cataloging Admin	John	Truelove	4
Poplar Bluff Municipal Library	Cataloging Administrator	7	Poplar	Cataloging Admin	Joshua	Lamb	1

5. If you choose “Excel output,” you’ll then have to open the output file once it has finished downloading.

## Understanding and Using the Report Output

Displays: patron home library, requesting user permission group, request month, requesting user name, patron name and hold count Filters: patron home library, request date range

## Other Resources

Feel free to contact any of the following Missouri Evergreen member libraries for examples of how their library uses the report and answers to common questions.

Reports Listserv ([mereports@lists.more.net](mailto:mereports@lists.more.net))