

Report Guide

Items Checked out Filtered by item status, by shelf, circulation mod, and patron profile

Shared Folders>Templates>ME-Reports>Library Circulations (ME)>Lists (ME)

Purpose of Report




Common uses of this report for looking at long-term overdues or billed items.

Running the Template

1. Enter a unique title in the “Report Name” field.

Template Name:	Items Checked out Filtered by item status, by shelf, circulation mod, and patron profile
Template Creator:	ME-Reports
Template Description:	Owning Lib, Circ Lib, Circ Rule, Item Due Date, Item Barcode, Item Shelf Location, Item Circ Mod, Patron ID, Patron Barcode, Patron {info}, Copy Status, Patron Paid, Patron Billed, Item Price, Bib Record ID, Record Title
Report Name:	<input type="text" value="Items checkout out by st"/>

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

Choose a folder to store this report definition:	<p>Selected Folder:</p> <ul style="list-style-type: none">  Report Folders  jclcatmaster  Monthly reports
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3. Select the library and branches (Organizational Unit ID) you want the report to include.

Column	Transform	Action	User Params
Circulation -> Checkout / Renewal Library -> Organizational Unit ID	Raw Data	In list	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #0070C0; color: white; padding: 2px;">JCL-ARN</div> <div style="padding: 2px;">JCL-ADMIN</div> <div style="padding: 2px;">JCL-NW</div> <div style="padding: 2px;">JCL-WIN</div> </div>
			<div style="border: 1px solid black; padding: 2px;"> <div style="padding: 2px;">Add Del</div> <div style="padding: 2px;">JCL-ARN</div> </div>

4. Selection the shelving locations you want the report to include (you can select multiple by holding the ctrl button while clicking).

Circulation -> Circulating Item -> Shelving Location -> Location ID	Raw Data	In list	<div style="border: 1px solid blue; padding: 2px;"> <ul style="list-style-type: none"> <li style="background-color: #0070C0; color: white; padding: 2px;">Teen Audio <li style="padding: 2px;">Teen Awards <li style="padding: 2px;">Teen Biography <li style="padding: 2px;">Teen Fiction <div style="text-align: right; padding: 2px;"> <input type="button" value="Add"/> <input type="button" value="Del"/> </div> <ul style="list-style-type: none"> <li style="padding: 2px;">Audio <li style="padding: 2px;">Juvenile Audio <li style="padding: 2px;">Teen Audio </div>
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5. Select the circulation modifier you want the report to include.

Circulation -> Circulating Item -> Circulation Modifier -> Code	Raw Data	In list	<div style="border: 1px solid blue; padding: 2px;"> <ul style="list-style-type: none"> <li style="padding: 2px;">Special <li style="padding: 2px;">Staff <li style="padding: 2px;">Videos <li style="padding: 2px;">eReader <div style="text-align: right; padding: 2px;"> <input type="button" value="Add"/> <input type="button" value="Del"/> </div> <ul style="list-style-type: none"> <li style="padding: 2px;">AudioBooks <li style="padding: 2px;">CD <li style="padding: 2px;">Media </div>
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6. Select the patron profile you want the report to include.

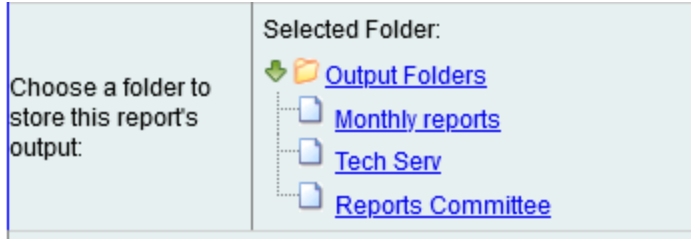
Circulation -> Patron -> Main (Profile) Permission Group -> Group ID	Raw Data	In list	<div style="border: 1px solid blue; padding: 2px;"> <ul style="list-style-type: none"> <li style="background-color: #0070C0; color: white; padding: 2px;">Temporary Card <li style="padding: 2px;">Unique Management <li style="padding: 2px;">Users <li style="padding: 2px;">Volunteers <div style="text-align: right; padding: 2px;"> <input type="button" value="Add"/> <input type="button" value="Del"/> </div> <ul style="list-style-type: none"> <li style="padding: 2px;">Outreach <li style="padding: 2px;">Patrons <li style="padding: 2px;">Probationary Patrons <li style="padding: 2px;">Reciprocal Borrower </div>
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7. Select the type of file you want to receive in the end.

Output Options

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

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



Viewing the Output

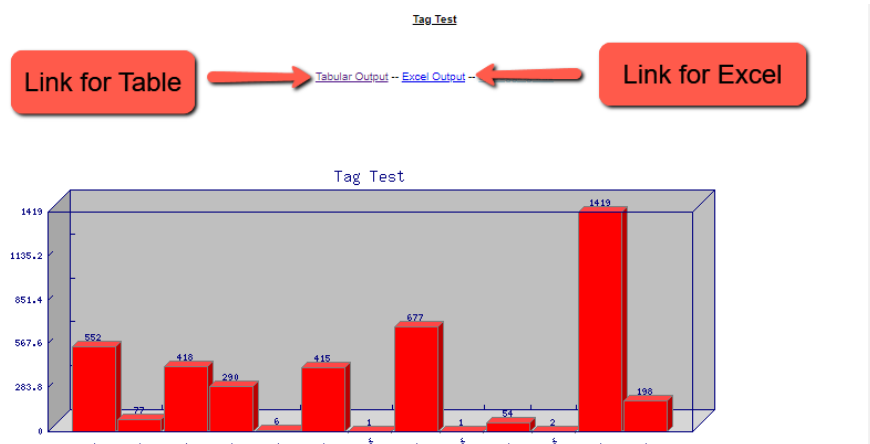
1. Navigate to the folder where you saved the output.
2. Check the box next to your report.



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



4. View the report results as a bar chart or table in the pop-up window or click on the link for "Excel output."
 - a. 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

The first thing to note about this report is that if you choose a combination of location and circulation modifier that don't have any items together, you will get no output. If you have a specific shelving location in mind, you can choose ALL of the circulation modifiers or if you have a specific circulation modifier in mind, you can choose ALL of the shelving locations.

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)