

Report Guide

List of items circulated based on due date and checkout library

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

Purpose of Report




This report was created to allow libraries to see a list of items that have been checked out between a specified date range for a specified library and specified circulation modifier(s). A common use for this report would be for a list of materials that are currently overdue in a certain shelving location.

Running the Template

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

Template Name:	List of items circulated between date and time and checkout library
Template Creator:	ME-Reports
Template Description:	Description: This report shows all items that have been checked out between a specified date range by checkout library and circulation modifier. Filters: Checkout Library, Checkout Date, Circ Modifier Displays: check out date and time, Item Barcode, Title, Author, patron barcode, patron first and last names.
Report Name:	<input type="text" value="Circ bw date time lib"/>

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

Choose a folder to store this report definition:	Selected Folder:  Report Folders  jclcatmaster  Monthly reports
--	---

3. Select the library and branches you want the report to include.

Column	Transform	Action	User Params
Circulation -> Checkout / Renewal Library	Raw Data	In list	<div style="border: 1px solid blue; padding: 2px;"> <ul style="list-style-type: none"> JCL JCL-ARN JCL-ADMIN JCL-NW JCL-MTN <div style="border: 1px solid blue; padding: 2px; margin-top: 5px;"> Add Del </div> <ul style="list-style-type: none"> JCL-ARN </div>

4. Select a range of due dates you want the report to include.

Circulation -> Checkout Date/Time	Date	Between	<div style="border: 1px solid blue; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 2px;"> Real Date ▼ 📅 2020-08-01 </div> <div style="text-align: center; padding: 2px 0;">- And -</div> <div style="border-top: 1px solid gray; padding-top: 2px;"> Real Date ▼ 📅 2021-02-28 </div> </div>
-----------------------------------	------	---------	---

5. Select the circulation modifier you want to include (you can select multiple by holding the ctrl button while clicking).

Circulation -> Circulating Item -> Circulation Modifier -> Code	Raw Data	In list	<div style="border: 1px solid blue; padding: 2px;"> <ul style="list-style-type: none"> CD Comics DVD Educational Videos <div style="border: 1px solid blue; padding: 2px; margin-top: 5px;"> Add Del </div> <ul style="list-style-type: none"> DVD </div>
---	----------	---------	--

6. Select the type of file you want to receive in the end.

Output Options

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

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

Choose a folder to store this report's output:

Selected Folder:

- Output Folders
 - Monthly reports
 - Tech Serv
 - Reports Committee

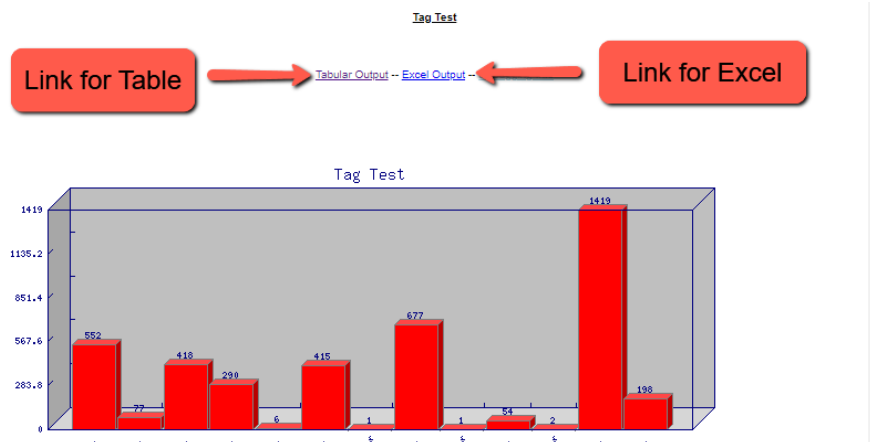
Viewing the Output

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

Select All None	report
<input type="checkbox"/>	Tag_Test 2
<input checked="" type="checkbox"/>	Tag_Test

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 output of this report details both item and patron specifications for all items due within the time range and for the circulation modifier(s) specified.

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)