

## Report Guide

### *List of pre-cat circulations based on circulating 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 all pre-cat circulations in a specified date range from a specified library. It shows ALL currently existing pre-cataloged items. A common use of this report would be to help identify pre-cat items that need to be removed.

#### Running the Template

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

Template Name:	List of pre-cat circulations based on circulating library
Template Creator:	ME-Reports
Template Description:	This report can be used to show all pre-cat circulations in a specified date range from a specified library. Shows all currently existing pre-cataloged items; useful for identifying items for removal. Filters: Check out Library, Circulation Date Displays item barcode, precat dummy title, precat dummy author, dummy ISBN, patron barcode, patron first name, patron last name, check out date, check in date
Report Name:	<input type="text" value="pre-cat circs by lib"/>

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

Choose a folder to store this report definition:	Selected Folder:  <a href="#">Report Folders</a>  <a href="#">jclcatmaster</a>  <a href="#">Monthly reports</a>
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3. Select the library and branches 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 blue; padding: 5px;"> <ul style="list-style-type: none"> <li>JCL-ARN</li> <li>JCL-ADMIN</li> <li>JCL-NW</li> <li style="background-color: #0056b3; color: white;">JCL-WIN</li> </ul> <div style="border: 1px solid gray; padding: 2px; margin: 2px 0;"> <span>Add</span> <span>Del</span> </div> <ul style="list-style-type: none"> <li>JCL-NW</li> <li>JCL-WIN</li> </ul> </div>

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

Circulation -> Checkout Date/Time	Date	Between	<div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Real Date</span> <span>📅</span> </div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">2021-01-01</div> <div style="text-align: center; margin-bottom: 5px;">- And -</div> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Real Date</span> <span>📅</span> </div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">2021-02-28</div> </div>
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- Select the type of file you want to receive in the end.

**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:	<p>Selected Folder:</p> <ul style="list-style-type: none"> <li>📁 <a href="#">Output Folders</a></li> <li>📁 <a href="#">Monthly reports</a></li> <li>📁 <a href="#">Tech Serv</a></li> <li>📁 <a href="#">Reports Committee</a></li> </ul>
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## Viewing the Output

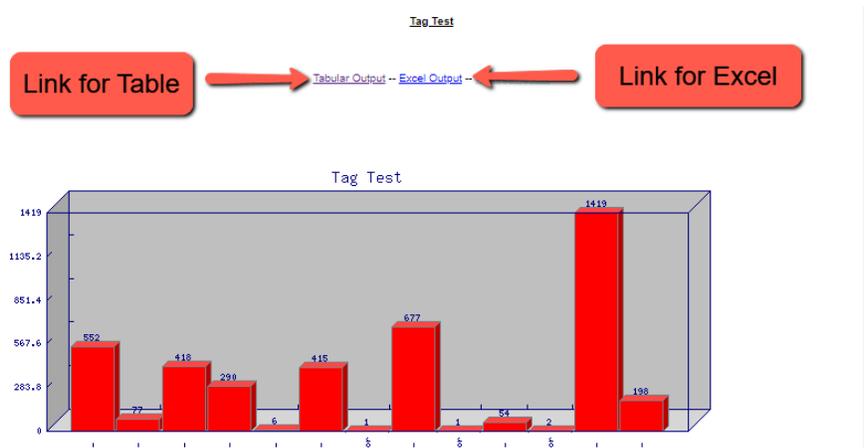
- Navigate to the folder where you saved the output.

2. Check the box next to your report.

Select <a href="#">All</a> <a href="#">None</a>	report
<input type="checkbox"/>	<a href="#">Tag Test 2</a>
<input checked="" type="checkbox"/>	<a href="#">Tag Test</a>

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 the pre-cat item information, patron information, as well as checkout and checkin date/time information. It stands to reason that if an item has a check-in date, but is still showing up on this report, the pre-cat still exists in the catalog.

## 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))