

Report Guide

Number of items circulated based on date created

Purpose of the Report

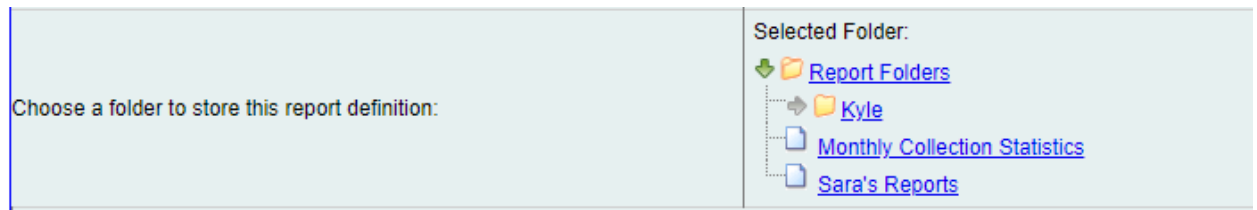
This report shows circulation numbers for items with a specific combination of owning library, shelving location and creation date between specified checkout dates. This report can be used to show the performance of new materials by specifying that only newly created items should be included in the report.

Running the Template

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



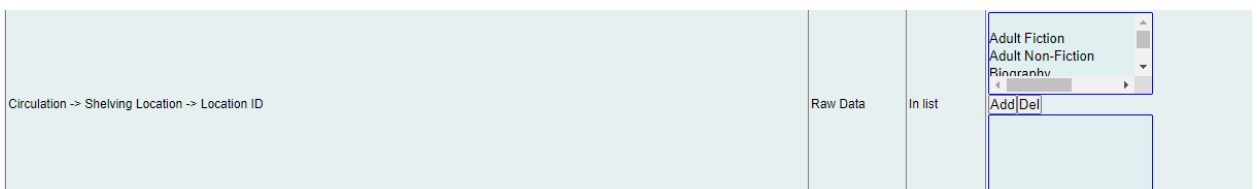
2. Select the folder where you wish to save the report.



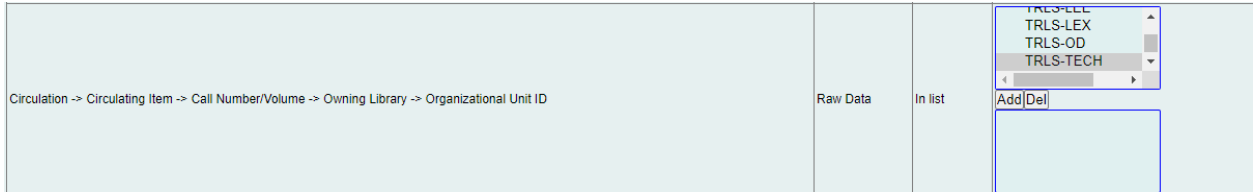
3. Select the Checkout Date time frame you would like the report to include. The resulting report output will only show items with a checkout date within the chosen time frame.

| Column | Transform | Action | User Params |
|-----------------------------------|-----------|---------|--|
| Circulation -> Checkout Date/Time | Date | Between | Real Date [dropdown] [calendar icon] [red box] |
| | | | - And - |
| | | | Real Date [dropdown] [calendar icon] [red box] |

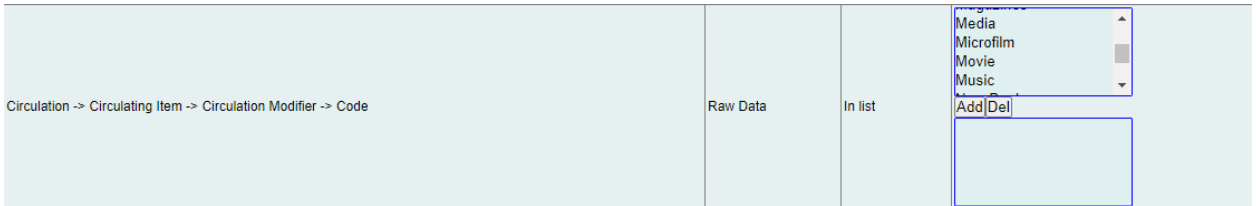
4. Select the Shelving Locations you would like the report to include. To select more than one, you can hold the Control key while clicking on the names or simply add them one at a time.



5. Select the Owning Libraries you would like the report to include. To select more than one, you can hold the Control key while clicking on the names or simply add them one at a time.



6. Select the Creation Date time frame you would like the report to include. The resulting report output will only show items with a creation date within the chosen time frame.

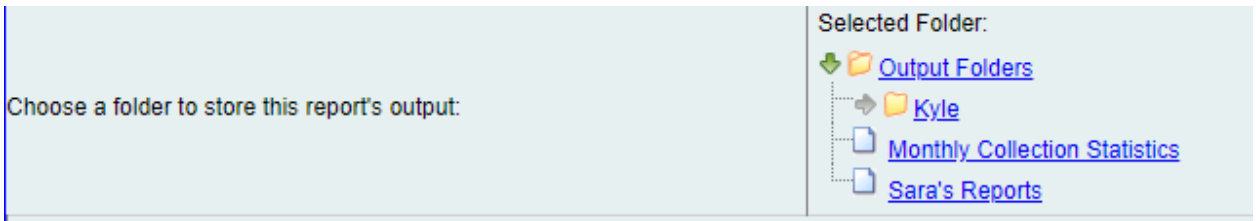


7. Select the type of output you want to receive in the end.

Output Options

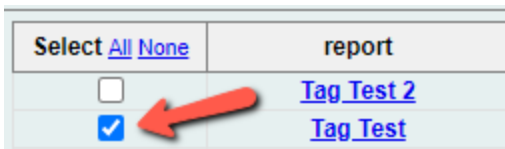
- Excel Output
- CSV Output
- HTML Output
 - Bar Charts
 - Line Charts

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.

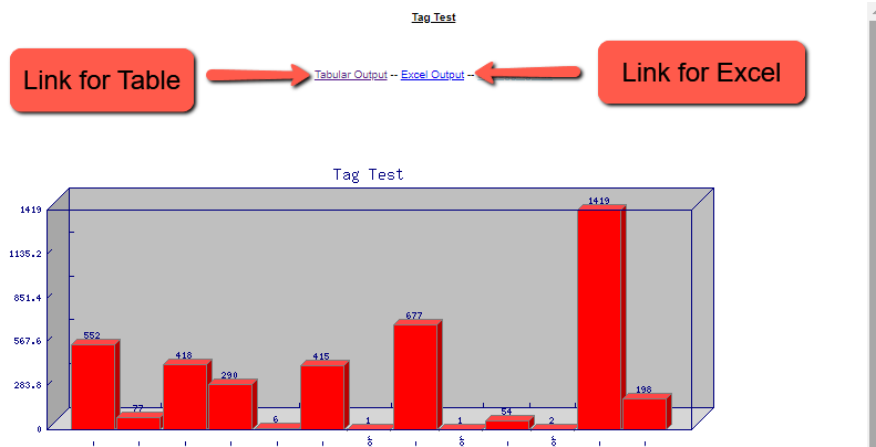


3. Select "View Report" from the drop-down menu above and click Submit.



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 resulting output for this report has columns for Shelving Location when circled, Owning Library, Circulating Library, and a Count of circulations. These columns show exactly what they say and will allow staff to compare the number of items circulated in each combination of criteria.

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)