

# Report Guide

## *Number of items circulated based on owning library and patron library*

### Purpose of the Report

This report shows circulation numbers for items with a specific combination of owning library, patron home library and checkout dates. This report can be used to show the borrowing and lending of materials between libraries, similar to other interlibrary loan reports. In this case it's based on the owning library and the requesting patron's home library.

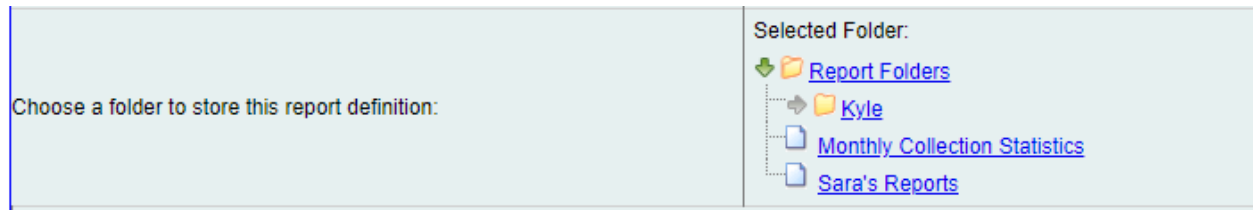
### Running the Template

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



Report Name: [Redacted]

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



Choose a folder to store this report definition:

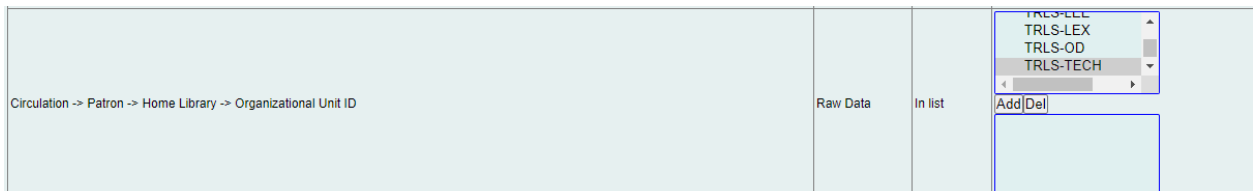
Selected Folder:

- Report Folders
- Kyle
- Monthly Collection Statistics
- Sara's Reports

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 Patron Home 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.



Circulation -> Patron -> Home Library -> Organizational Unit ID

Raw Data In list

- TRLS-LEX
- TRLS-LEX
- TRLS-OD
- TRLS-TECH

Add|Del

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.

Circulation -> Circulating Item -> Call Number/Volume -> Owning Library -> Organizational Unit ID

Raw Data    In list

TRLS-PELL  
TRLS-LEX  
TRLS-OD  
TRLS-TECH

Add|Del

6. Select the type of output 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](#)
- [Kyle](#)
- [Monthly Collection Statistics](#)
- [Sara's Reports](#)

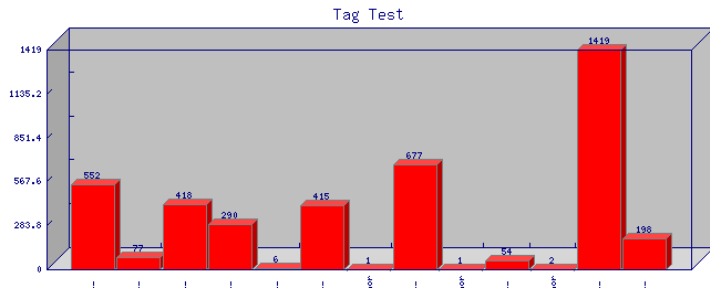
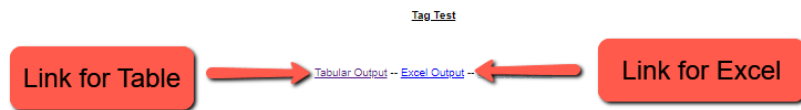
## Viewing the Output

1. 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 resulting output for this report has columns for Check Out Date, Owning Library, Patron Home Library, and a Count of circulations. Some sorting may be necessary in your spreadsheet program of choice in order to parse the data effectively.

## 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))