

Top Uses of Web Management Reports

1. Report for Monthly Circulation Data.

This report measures the collection circulation of a particular location within the collection. Report must be run each month for the previous month's data. For example, August's report must be run in September. After October 1, August is replaced in the report by September data.

- Go to your institution's catalog URL: <http://>
- Click CIRCULATION.
- Click CIRC ACTIVITY.
 - Input your username and password.
- Click CHECKOUT.
- Set your parameters.
 - Choose DATES. For the monthly circulation report, click LAST MO.
 - Choose LOCATIONS. Depending on the arrangement of your system, you'll select: System, separate or one only. For the monthly circulation report, click ONE ONLY.
 - Choose record TYPE. For the monthly circulation report, it's often beneficial to run it with various types of records and save it in Excel: Patron, I Type and Location.

2. Report for Hourly Statistics

- Click HOURLY.
- Click ITEM or PATRON.
 - *Item* will report the number of items checked out at the selected terminal location for each hour of each day of the reporting month. *Patron* will report the number of patron records accessed and circ'd to at the selected terminal location for each hour of each day of the reporting month.
- Choose a MONTH.
 - Hourly stats are reported in monthly increments.
- Use the up/down arrow button on the toolbar to scroll through terminal locations to arrive at the location desired for reporting.

3. Activity Report

This report looks at the general activity (check outs, check ins, etc.) within an organization. It reports both terminal activity (i.e., Terminal 220, the Circulation Desk) and location activity (i.e., ulagy, Government Documents.) Ideal for generating system-wide annual reports. Easy to move into Excel and removed unwanted rows.

- Under CIRC STATS, click ALL ACTIVITY.
- Choose DATES.
- Choose SORT BY to establish Terminal, Location, Hour or some more specific limit.

4. Busy Call Number Areas for Shelf Reading Projects

This report isolates a collection based on location and indicates the busiest call number ranges.

- From the main view, Click CROSS TAB.

- Skip REPORT, as it defaults to CrossTab.
- Under STAT TYPE, choose Checkout.
- Under DATE RANGE, choose a period of time. Recommendation is to select narrow over broad, as a database with numerous location codes, when searched over a large time period, may generate a report too large to display. Good examination period might be the previous quarter/semester, with the reasoning that this would cover recent activity in the stacks.
- Under LIMIT, choose System.
- Under ROWS, choose Call Number.
- Under COLUMNS, choose Location.
- Once the report is generated, download or cut/paste into Excel. Delete non-native location codes.

5. Track Local Materials Use

This report will enable systems with multiple locations to track usage of local materials between those locations.

- Under CIRCULATION, click CrossTab.
- Under STAT TYPE, click Checkout
- Under DATE RANGE, choose the period of time for analysis.
- Under LIMIT, click Terminal. (Terminal will limit the report to one checkout location. Meaning that if you have four locations in your library system, you'll want to run this report for all four locations.)
- Under ROWS, click Location.
- Under COLUMNS, click Home Library.

Once the report is generated and open in Excel, erase all locations and home library codes that are not part of your institution. The remaining data displays circulations at the terminal location by patrons listed by their assigned home library. Once this data is gathered for all system locations, it can be combined for an assessment of intra-campus usage of materials.