

SECTION XII CIRCULATION AND STATISTICAL REPORTS

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A. CIRCULATION REPORTS

Hold Queue report (aka pick list)

The Hold Queue is a report of the hold requests that can be filled by items Available at your library. Hold requests move through the system following a listing of all ILS libraries called the Hold Sequence.

- When a patron places a hold, the system first checks the patron's pickup location to see if an item is available at that location to fill the hold.
- If there is not, the hold request follows the Hold Sequence, starting from the patron's pickup location, to the next library in the sequence that has the item listed as Available.
- If staff at a library cannot fill the hold with their item (can't find the item, item missing a part, item damaged, etc.), they can either set the item to Trace on the report or change the Lost status in the item record to Trace. Different libraries have different workflows.
- Marking the item Trace pushes the hold request back out into the Hold Sequence to the next library that has an Available item.
- **Each library in the ILS must run their Hold Queue report at least once a day that they are open** and fill as many holds as they can and/or set items to Trace that cannot be located.
 - If a library does not run and fill the hold requests on their Hold Queue report, hold requests will get backed up and other holds in the system will not get filled.
- If you are the only library that owns the item or that has an "Available" item, if you are not able to find the item after searching for two days, you should mark the item as Trace so the patron know why their hold request remains unfilled.

The Hold Sequence is posted in the CODES page of the ILS Support website. Please link to that page for the most current Hold Sequence.

See [Circulation Manual Section IX Placing and Managing Holds](#), Part F Reports for instructions on how to run and process the items on the Hold Queue report.

Hold Awaiting Pickup report (aka pull list)

The Hold Awaiting Pickup report lists ALL of the items that are supposed to be on your Hold Shelf, Expired and Unexpired (Active). Items remain on the hold shelf for 8 days, day 1 is the day the item was checked in at your library. The eight days include closed days but will not select a closed day as an expiration date (Section XVI Circulation Tools, Bibliovation Calendar).

Libraries should run the report for Expired holds each day and check in the items to remove them from the report. For specific instructions on how to run the report and process items removed from your hold shelf, go to Section IX Placing and Managing Holds, Part J.

Transfers to receive

This is a list of items that are listed as In Transit to your library as of the day/time you run the report. Useful as a reference report, not really useful in any specific workflow.

B. STATISTICAL REPORTS

Bibliovation Daily, Weekly, Monthly and Annual statistical reports are posted on the SCLS website at <http://www.scls.info/ils/reports>. To access most of these reports you must use your library's login/password to access the ILS Support webpages.

C. PROBLEM ITEM REPORTS

A number of different "problem item" reports are run for library staff. Most reports are posted on the ILS Support / [Reports](#) webpage. This section discusses the reports that are run for circulation-related statuses.

Trace report

The Trace report is a list of items that were changed to Trace status last week. This report is run every week. Items are changed to Trace because they could not be found on shelf. Status can be changed from the Holds Queue report or in the Item Detail screen.

Generic workflow: modify according to your library needs.

1. Print your library's section of the posted online report.
2. Search the item in Bibliovation and check the status.
3. If item is no longer marked TRACE, cross it off your list.
4. If item is still marked TRACE, place one check mark next to the report entry to indicate you have checked the computer.
 - a. Check your shelves for the item.
 - i. If item is not in your library, place a second check next to the report entry to indicate that you have checked the shelves.
 - ii. If you find the item, check it in and cross it off your list.

Some libraries, if an item has been set to Trace for an extended period of time, will change the status to Missing. These items will eventually be included in the Annual batch deletion.

Long in Transit report

The Long in Transit report is a list of items that have been In Transit or Transit Hold for more than 2 weeks.

In January 1998, SCLS announced it would no longer make refunds on items marked Lost in Transit. The only refunds would be for items damaged in delivery.

The current procedure for dealing with long in transit items is:

Step 1.

- Search for the item barcode.
- In the Item Statuses screen, the Checkout status will tell you if the item is still in transit, which location it is going to and the date it was put into transit.
 - Other statuses may display in the same area, like On Holds or Withdrawn, Trace, etc., but certain statuses will also display in their own fields – types of Lost, Damaged and Custom statuses.
- If the item is no longer In Transit, cross the item off the list; you are done dealing with this item.
 - If the status is still In Transit, note the library where it was put into transit and the library where it was sent.
 - If it is in transit to fill a hold, follow these steps:
 - Click the Holds link in the left screen menu
 - If there are other items Available to fill this Hold, add a new hold to the patron's record and then cancel the one for your long in transit item.
- Write all this on the report.
- In the Item Status screen, click the pull-down menu for the Custom statuses field and set that field to Lost in Transit.

Step 2. The remaining items are searched first by the library that has them on their report (the owning library). First check your shelves, including the hold shelf, to see if the item is actually in the library.

- If you find the item on your shelves, check it in and cross it off your report.
- If you don't find it, proceed to step 3.

Notify the sending library that the item is overdue in transit. If two other libraries are involved, and the item is on your report only because you own it, notify both libraries.

- Send an email with this information:
 - Owing library
 - Collection code
 - Shelf Location
 - Title
 - Barcode#
 - Status

- Date put in Transit
- If the item was in transit to fill a hold, ask the library to check the hold shelf; then check their shelves. Staff should check in any item found and follow instructions on the screen.
- The owning library has now completed all required steps for their own list.
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Step 3(b). If your library is notified by another library that their item was placed in transit from or to your library, do the following:

- Search your shelves, including your hold shelf, to see if the item is in your library.
 - If you DO locate it, check in the item and then route it appropriately.
 - If you don't locate it, take no further action.

Step 4. What if the item is never found?

Each owning library should determine a reasonable length of time for their items to be recovered. For example, your library has a policy that if a Lost In Transit item is not recovered within 6 months, the library will delete the item record.

Claims Returned report

The Claims Returned report is run monthly for each library that owns items with a status of Claims Returned set one year prior.

Use this monthly report to remove older items from the database. Items with a status of Claims Returned are not deleted automatically during the annual batch deletion process; they must be resolved manually by the owning library. Deciding whether or not to charge patrons for Claims Returned items is a local library policy; there is no system-wide policy. Once the Claims Returned status has been cleared, the item can be deleted.

If it **is not** your policy to charge patrons for Claims Returned items, and you want to remove the item from the patron's Lost Items list, follow these steps:

1. Access the patron record.
2. Click the patron's Lost Items tab.
3. In the Lost Items list, find the entry containing the item you are working on.
 - a. An item that has been "claims returned" will have the phrase *Claims Returned (Undo)* in the Claims Returned column.
4. Click the "Delete" hyperlink at the end of the entry in the Lost Items list.
 - a. Information about the Claims Returned item will stay in the patron's Account History screen until it is eventually purged from the patron record.
5. Go to the item record and change the Withdrawn status to Withdrawn. It will be batch deleted at the end of the month.

If it **is** your policy to charge patrons the replacement price for Claims Returned items aged past a certain time, follow these steps:

1. Access the patron record.

2. In the patron's Lost Items list, select the line item containing the item you are working on.
 - a. An item that has been "claims returned" will have the phrase *Claims Returned (Undo)* in the Claims Returned column.
3. Click the "Undo" hyperlink to undo the claims returned and make the item Lost again.
4. Go to the patron's Pay Fines tab to confirm that the system has re-charged the patron the replacement price for the item.
5. Add a Message on the patron's Check Out screen explaining that you have changed the claims Returned status back to Lost and are charging the patron for the items, based on your library's policy.

D. REGULAR PATRON AND CIRCULATION CLEAN-UP PROJECTS AND REPORTS

Changing a patron record from a Juvenile to an Adult Patron Category.

Some libraries prefer to update Juvenile records to Adult more often than other libraries. Other libraries prefer to wait until the patron comes into the library to update the record. When, and if, you make this change is up to your library's policy.

- The instructions are posted in the [Circulation Manual, Section V Patron Record and Registration, Part R, Changing a patron record from Juvenile to Adult patron Category](#)

Cleaning up duplicate patron records.

This clean-up is usually done at the point of realizing that a patron has multiple accounts. We do not have the functionality to merge patron records so the clean-up process is a manual one.

- The instructions are posted in the [Circulation Manual, Section V Patron Record and Registration, Part R, Cleaning up duplicate patron records](#)

Annual Purge of Inactive Patrons.

SCLS staff perform an annual purge of Inactive patron record. The parameters and instructions are posted in the [Circulation Manual, Section V Patron Record and Registration, Part R, Annual Purge of Inactive Patrons](#)

Annual Batch Deletion Reports

Cumulative reports are run each November and May for items that have problem item statuses that were assigned ***at least one year prior to the report date***. These reports help libraries keep track of older, problem items and give them the chance to take appropriate action on these items, according to their local policy, or leave them for annual batch deletion.

Reports are run each November and May. Each July items that appeared on the May reports but are not modified or resolved are batch deleted.

Libraries need to review these reports and

1. Decide if they are going to keep the item record, or the item itself in the case of Damaged items, or

2. Delete the record from the database or
3. Leave it and let the annual batch deletion process delete the record the database.

If a library does not already have a workflow for reviewing these items, here are some questions to ask to see if the status of the item can be changed or it should be deleted. This list is not exhaustive.

- Were broken items mended?
- Were replacement parts ordered?
- Did patron pay for damages?
- Were magazines with Current Issue/No CKO status correctly updated?
- Were items marked as In Processing correctly checked in?
- Do patrons with "Lost items" need to be reminded about payment?

Annual Batch Deletion problem reports:

- **ABD Damaged.** This report is posted on the Reports page, Batch Deletion folder.
- **ABD Other** Item Statuses (AV Repair, Defect Reported, Lost in Transit, Mending, Missing Inventory, Parts Missing.). This report is posted on the Reports page, Batch Deletion folder
- **ABD Lost** (Claims Returned, Lost, Missing, Trace). This report is posted on the Reports page, Batch Deletion folder

Annual Batch Deletion FAQ

QUESTION: When the items from the lost report are deleted, what happens with the item information in the patron account? For example, if a patron hasn't paid for the item yet, will the charge still be there and will there be any information about what item the charge is for? When I tried to test this in the sandbox it appears that the charge remains, but it is just for a generic lost item - no title. The Lost Item tab still has information on the item after it is deleted but I'm not sure how long it remains there after the deletion - and if there are multiple lost item charges it is not possible to determine which is which.

ANSWER: If the item was lost prior to 4/2014, the hyperlink will be removed from the entry and it will be difficult to extrapolate the title. Staff will have to refer back to the last ABD report run, search for the patron barcode and manually figure out which item for which charge. This is the reason why we have not been batch deleting Lost items. But, as another library staff person pointed out, we have an "archive" in the reports that were run.

QUESTION: If we decide for whatever reason that we don't want an item to be deleted, what should we do?

ANSWER: Modify a field in the item record and save the change. This will change the timestamp of the item record and it will no longer be eligible for the ABD.

QUESTION: Is it possible for future ABD lost reports to extract information about whether or not the item has been paid for yet?

ANSWER: We provide two monthly reports that provide information about Lost and Paid items: Lost and Paid at Another Library and Lost over 6 months ago and Paid.

Annual Purge of Old Charges

Procedure for the Annual purge of charges 10 years old or older and the total of the older charges is under \$100.00.

1. In November of each year, ILS staff will run reports, by Home Library, of patron records with the following Fee, Fine and Lost charge parameters:
 - a. Datestamp (timestamp) of 10 years old or older from the date the report was run; and
 - b. Total of the old charges is less than \$100.00.
2. Reports will be (posted, delivered) and will include the following information:
 - a. Borrower number
 - b. Fee Type
 - c. Fee Description
 - d. Timestamp of charge
 - e. Transaction library
 - f. Owning library (for Lost charges, if available)
3. Library staff should review the records. If there is a reason that a library chooses to have the charges remain on the record, the library staff can/should do the following:
 - a. Create a new manual invoice of charges based on the original charge or charges. For example, patron X owes 25.00 each for items that he refuses to return and was originally billed for 11 years ago. Staff will create new invoices with wording similar to this "Title B by Author W. Lost charge 25.00. Original charge dated mm/dd/yy". Staff initials/library delivery code.
 - b. After completing the new invoice, staff should Waive the charges on the older entry. It is up to each library if they want staff to include descriptive information in the Waived action.
 - c. If libraries decide to create "new" invoices on patron records, they should create a written local library policy that supports these actions. This is recommended in case of any questions produced by patrons.
4. In December of each year ILS staff will re-run the reports, by Home Library, of patron records with the following Fee, Fine and Lost charge parameters:
 - a. Datestamp (timestamp) is 10 years old or older from the date the report was run ; and
 - b. Total of the old charges is less than \$100.00.
 - c. AND will submit the information to LibLime staff who will batch waive all the charges that qualify.