# Circulation Report Guidelines

Circulation staff will use the following reports at the prescribed intervals.

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| --- | --- | --- | --- | --- | --- |
| **Report** | **Use** | **Location(s)** | **Action to Take** | **Documentation** | **Priority** |
| Picklist | Daily | Leap > Utilities > Picklist Processing > Pending tab  Web Reports > Patron Management > Pick List Processing report | Pull and check in items to trap for requests. | [Daily Picklist in Leap](https://www.ccslib.org/training/daily-picklist-leap) | Yes |
| Print Notices | Daily | Leap > Utilities > Print Notices  Staff Client > Utilities > Reports and Notices > Notices | Generate and post overdue, bill, and hold print notices. | [Generating Print Notices in Leap](https://www.ccslib.org/training/generating-print-notices-leap)  [Generating Print Notices in the Staff Client](https://www.ccslib.org/training/generating-print-notices-staff-client-1) | Yes |
| Unclaimed Holds | Daily | Leap > Utilities > Picklist Processing > Unclaimed tab  Web Reports > Patron Management > Daily Clean Hold Shelf report | Pull unclaimed held items and check in to clear unclaimed status. | [Unclaimed Holds](https://www.ccslib.org/training/unclaimed-holds) | Yes |
| Undeliverable Notices | Daily | Library’s notification email inbox | Monitor failed notices; adjust patron notice settings if needed. | [Managing Undeliverable Notices](https://www.ccslib.org/training/managing-undeliverable-notices) |  |
| Patron Library / Patron Code / Patron RBP Code / Prefix Mismatch | Weekly | Web Reports > Patron Management > Patron Library / Patron Code / Patron RBP Code / Prefix Mismatch | Review tabs and fix miscoded fields in the patron registration workform. | [How to Use: Patron Library / Patron Code / Patron RBP Code / Prefix MisMatch Report](https://www.ccslib.org/training/how-use-patron-library-patron-code-patron-rbp-code-prefix-mismatch-report) |  |
| InTransit Overdue | Weekly | Web Reports > Collection Management > InTransit Overdue report | Check shelves for items belonging to your library. If found, check the item in. | [InTransit Overdue](https://www.ccslib.org/training/intransit-overdue) | Yes |
| Items with a Status of Claims | Weekly | Web Reports > Bib and Item Management > Items with a Status of Claims report | Check shelves for items belonging to your library. If found, check the item in to clear the claim. | [Claimed Items: Making a Claim > Monitoring Claims](https://www.ccslib.org/training/claimed-items-making-claim#monitoring) | Yes |
| E-mail, Telephony, and TXT Delivery Failure Report | Weekly | Staff Client > Utilities > Reports and Notices > Notices > E-mail delivery failure report, Telephony delivery failure report, TXT delivery failure report | Monitor reports for large spikes in undeliverable notices. Report spikes in failed notices to CCS.  Fix obvious mistakes in email and phone numbers (example: “gmail,com” fix to “gmail.com”). | [Notice Maintenance](https://www.ccslib.org/training/notice-maintenance) |  |
| Patrons opted out of Overdues or Bills | Monthly | Web Reports > Patron Management > Patrons opted out of Overdues or Bills report | Identify patrons registered to your library. In the patron’s registration workform preferences section, de-select checkbox next to overdue and/or bill notice type to opt patron back-in to these notices. | [Patrons Opted Out of Overdues or Bills](https://www.ccslib.org/training/patrons-opted-out-overdues-or-bills) | Yes |
| Patrons with Invalid Phone and/or EmailAddress | Monthly | Web Reports > Patron Management > Patrons with Invalid Phone and/or EmailAddress report | Review the patron’s email address or phone number. Fix obvious errors/typos. If there are no obvious typos, adjust patron notice settings as needed. | [Patrons with Invalid Phone and/or Email Address](https://www.ccslib.org/training/patrons-invalid-phone-andor-email-address) |  |
| Patrons With No Notification Option | Monthly | Web Reports > Patron Management > Patrons With No Notification Option report | Assign patrons a valid notice option of email, phone, or mailing address. | [Patrons with No Notification Option](https://www.ccslib.org/training/patrons-no-notification-option) | Yes |
| Patrons with Deposits or Credits | Monthly | Web Reports > Financial Reports > Patrons with Deposits or Credits report | For Deposits: Locate transactions where your library is listed as the “Payment Library” and remove the deposit  For Credits: Locate users registered to your library using the "Patron Branch” column and remove the credit | [Removing a Deposit from a Patron’s Account](https://www.ccslib.org/training/removing-deposit-patrons-account)  [Removing Credit from a Patron’s Account in Leap](https://www.ccslib.org/training/removing-credit-patrons-account-leap) |  |

# Suggested Reports

Staff are not required to use the following reports. Instead, these are reports available for staff to use if they are interested in:

**Checking on Lost, Damaged, or Missing Items:**

* Lost and Missing Items *(Staff Client > Utilities > Reports and Notices > Cataloging> Item)*
* Monthly Lost and Missing and Bindery(Damaged) *(Web Reports > Statistics)*

**Checking on Soon-To-Be Billed Items:**

* Daily Search Shelves *(Web Reports > Patron Management)*

**General Circulation Statistics:**

* Daily Checkouts and Renewals *(Web Reports > Statistics)*
* Monthly Circ Activity by Day *(Web Reports > Statistics)*
* Monthly Circ Dpt Stats *(Web Reports > Statistics)*

**Information on Patron Fees:**

* Daily Cash Report *(Web Reports > Financial Reports)*
* Daily Detail Payment Report *(Web Reports > Financial Reports)*
* Monthly Detail Payment Report *(Web Reports > Financial Reports)*
* Monthly Detail Waived Bills Report *(Web Reports > Financial Reports)*

**Information on Polaris Settings and Staff Users:**

* Known L2 Users *(Web Reports > Extra Special)*
* Polaris Policies *(Web Reports > Policies)*
* Polaris Users and Permission Groups *(Web Reports > Policies)*
* Workstation List *(Web Reports > Policies)*

**Managing Holds:**

* Expired Requests *(Staff Client > Utilities > Reports and Notices > Circulation > Holds)*
* Item Holds *(Web Reports > Patron Management)*
* Old Holds *(Web Reports > Patron Management)*
* Weekly No Eligible Items for Holds *(Web Reports > Patron Management)*

**Notice Information:**

* Daily Notice Delivery Report *(Web Reports > Patron Management)*
* Email and Text Summary Report *(received via email)*
* Notice Text (All Libraries) *(Web Reports > Policies)*
* Telephony Summary Report *(Staff Client > Utilities > Reports and Notices > Notices)*

**Patron Record Data Cleanup:**

* Legacy Patron Notes *(Web Reports)*
* Monthly Patrons 18+ Years of Aged with PatronGuardian Data *(Web Reports)*

**Patron Record Maintenance:**

* Inactive Patrons *(Staff Client > Utilities > Reports and Notices > Public Services > Patron Services)*
* Monthly Expired PAC Registrations *(Web Reports > Patron Maintenance)*
* Monthly Patron Database Maintenance *(Web Reports > Patron Maintenance)*
* Monthly Patrons Expiration Date Next Month *(Web Reports > Patron Maintenance)*
* Patrons Added/Removed *(Web Reports > Statistics)*

**UMS Collection Services:**

* Daily Collections Update *(Web Reports > Financial Reports)*
* Pre Collections Report *(Web Reports > Patron Management)*
* Weekly Collections Submission *(Web Reports > Financial Reports)*