



Traverse des Sioux Library System

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Circ Reports in WorkFlows

The following reports are assigned to your CIRC logins, and run on a regular schedule.

XXX=Your 3 letter library symbol

XXX Assumed Lost report (scheduled to run as per library instructions. Never alter scheduled report.)

Generates bill notices that are sent to the patron for long overdue items. Status of item changes to LOST-ASSUM and is no longer considered an “active” checkout. Library that owns the item issues the bill, but the bill reflects the policy of the charging library. Use “Generalized Bill Notices” to issue bills for damaged items or other bill reasons.

XXX Clean Holds Shelf (Daily. Never alter scheduled report.)

Lists items that have been on the hold shelf at least 14 days and should be returned to the home library, reshelfed, or transited to another library for fulfillment of a hold.

XXX Enter Cost for Bill (scheduled to run as per library instructions)

Alerts you to items that need a price entered into the item record before the next Assumed Lost report is generated.

XXX Hold Pickup Notices (Daily. Never alter scheduled report.)

Generates hold pickup notices for patrons. Even if you do not mail these notices, it is necessary for the report to run. The Clean Hold Shelf report is linked to the hold pickup notice report.

XXX List Holds Unfilled (15th of each month)

Lists holds that were placed over 45 days prior, and have not yet been filled. It alerts staff to possible problems in fulfilling the request for a patron.

XXX List transits from (15th of each month)

Lists items that have been intransit over 14 days. Helps with tracking down misplaced items.

XXX Overdue Notices (scheduled to run as per library instructions)

Generates overdue notices to patrons, based on charging library.

One regularly scheduled report is assigned to the REPT login, because one report that generates a separate report for each library: XXX Onshelf Hold Items report

The report runs at 8:00 a.m., 12:30 p.m., and 4:30 p.m. each day. Try always to work off the most recent copy of the report, as distribution of system holds are dynamic (changing as copies are returned, new holds are placed, etc.)

Additional Useful Reports

Upon request, you can be given ownership to the following types of reports. There are dozens of reports that can be created, so if you think of something you want or need, contact the TdS office for assistance.

- Generalized Bill Notice Report
Produces bills for damaged items, or 2nd billing for LOST-ASSUM items, etc. Can be scheduled as needed. **This should NEVER be used as a substitute for the “Assumed Lost” report for generating the 1st notice for long overdues.**
- Unique Titles Bib list
A list of titles unique to your library within the system.
- List items with a location of STACKS
A list of old “CTE” items that need to be transferred to a full bib record or cataloged.
- List titles with >4 holds
A list of titles with 4 or more system holds
- List users in zipcode xxxxx
- List items with item type of xxxxx
A list of items for collection development or cleanup (such as those with item type “unknown” or “DVD” that need to be changed to “DVD-FIC”.)
- List items with item category 2 of xxxxxxx
A list of items with a category 2 of “unknown”, or whatever value you select.
- List items with less than x number of charges
- List items older than 19xx
- List bills paid in full.
- Avg pub yr by item type
- Shelflist by home or current location
- Bill totals by bill type or amount billed