

# Reports for the greater good

Evergreen Annual Conference

April 1, 2016

All reports shared at: [gdcplg-localadmin>EI Annual Conf 2016](#)

Name of Report	Description of report	Recommended Frequency & What Next?
Adults w/limited access (Active only)	Report to find patrons who have turned 18 but are still listed as limited access	-- Monthly -- Update patron accounts
Claims Returned Materials	List of items/patrons with claims returned transactions	-- Monthly/ Bi-Monthly -- Mark items missing after a period of time
Detailed items due between dates	List of overdue items – checking shelves to makes sure they weren't shelved whiles still checked in	-- Weekly/Bi-Weekly -- Check shelves for items and check in those found
Hold Based Purchase Alert	List of items in demand by your patrons (report runs slowly)	-- Bi-Weekly/Monthly -- Purchase new titles for your patrons
List Items by Status and Date Modified	List of items with LOST Missing or other status Useful for checking shelves	-- Monthly/Bi-Monthly -- check shelves for items which may have been missed in checkin
List Items with Missing Circulation Modifier	Title and barcode of all items without a circulation modifier	-- Monthly/Bi-Monthly -- catalogers to clean up records
List of Items Missing Price	Title, Author, Circ Modifier and barcode of items missing price info	-- Monthly/Bi-Monthly -- catalogers to clean up records
List of Items with 0.00 Price	Title, author, circ modifier and barcode of items missing price info.	-- Monthly/Bi-Monthly -- catalogers to clean up records
List patrons expired over x months ago without open transactions	Use 35 months to get a report for shredding registration forms of expired patrons	-- Monthly on the first day of the month -- Shred paper registration forms if used
List Pre-Cat Items no longer circulating	Good for keeping pre-cat records under control	-- Monthly/Bi-Monthly -- catalogers to clean up records
Open Incoming Transits	List of items stuck in transit	-- Monthly -- Check shelves, if not found mark missing
Open Outgoing Transits	List of items stuck in transit	-- Monthly -- Check shelves, if not found mark missing
Patrons with Negative Balances	List of patrons who have a negative balance	-- Just once!! -- clean up patron records by adding bills
Selection Criteria for items not circulated since date	Weeding report	-- As needed -- <b>Weed!!</b>