

CARL REPORTS

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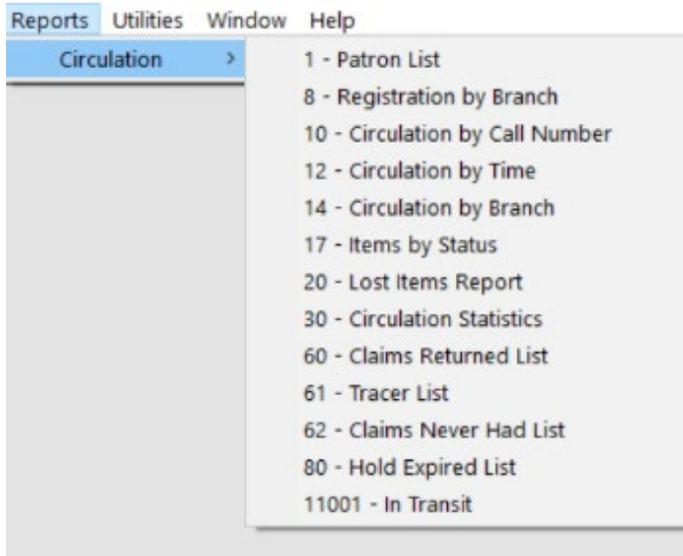
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CARL.X REPORTS: THE BASICS

The CARL.X Reports are accessible through the Reports Menu at the top of the screen.

The number of reports available to you depends on your permissions level in CARL.X. The reports frontline staff and managers use are under Circulation.

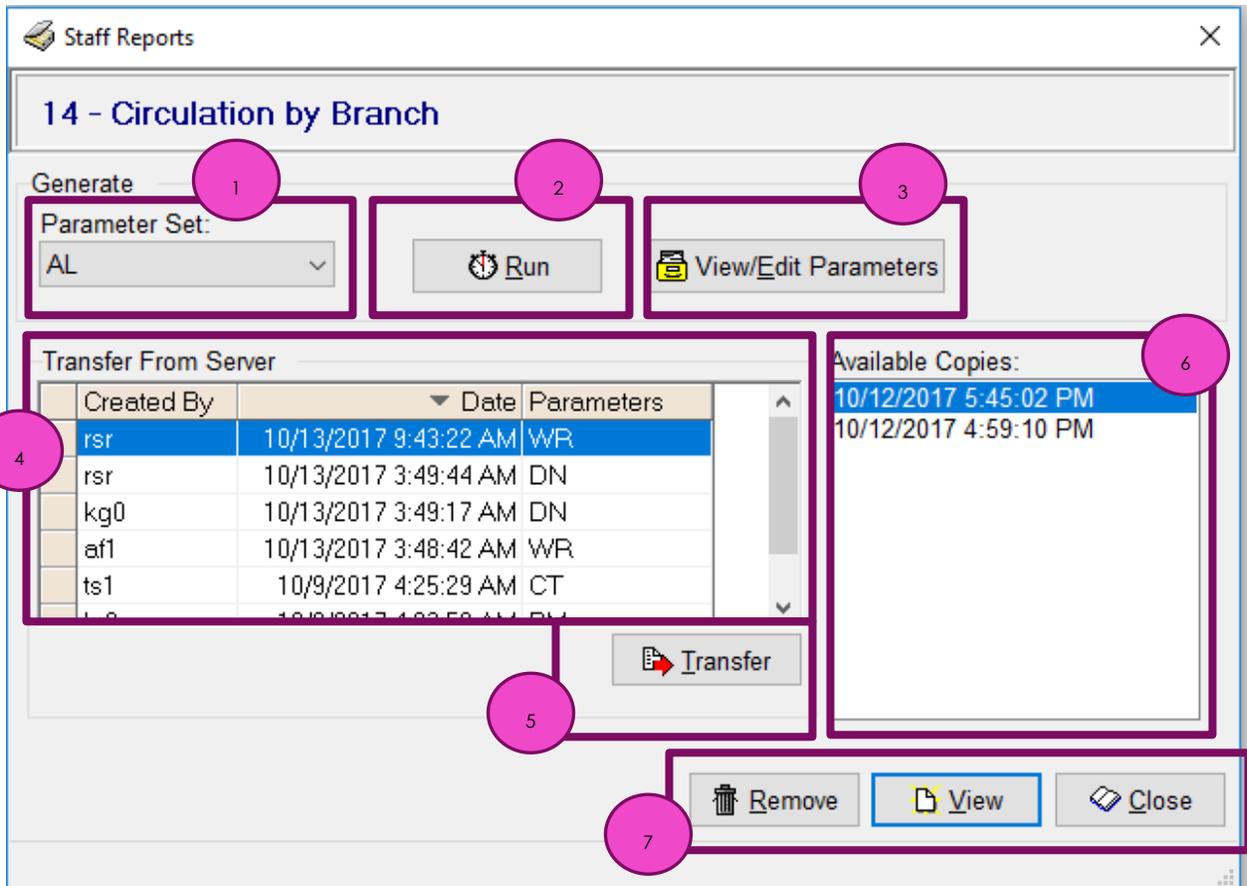


This document will go over all the reports they have access to.

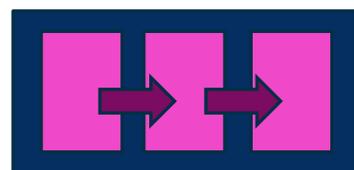
Reports are listed by number and then by name. They are somewhat grouped by the purpose of the report but not entirely.

REPORTING WINDOW

Each of the reports starts with the same basic dialog box. Reports are run and saved on the CARL.X server initially. To view or manipulate the report, you need to transfer a copy from the server to your local computer. Each of the functions available are explained below.



1. **Parameter** – this is generally going to be your library's two letter code. Selecting this will determine which settings are already chosen when you go to the next step.
2. **Run** – select this to run the report when you have changed all the settings you want.
3. **View/Edit Parameters** – this takes you another window to make changes to settings specific to the report you're working with.
4. **Transfer from Server** – this shows you the copies of this report that are currently on the server. You can select any of these to transfer a copy onto your computer.
 - **Created By** – this is the 3 letter code of the employee that last ran that report
 - **Date** – this is the date and time that report was last run. Sometimes these are refreshed overnight so the timestamp shows a time in the early morning hours.
 - **Parameters** – this is the library/parameter that was set in # 1.
5. **Transfer** – this button will transfer a copy of the report highlighted in blue to your local computer.
6. **Available Copies** – this shows you which copies of this report are available on your local computer. It only defines them based on the date/time that the report was transferred, not necessarily when it was run. If there are too many copies to view on one screen, you will have a scrollbar to allow you to view the rest of them. The scrollbar will be vertical, but the list of reports is in horizontal columns. So,



if you scroll down, you will see the next vertical column of reports.

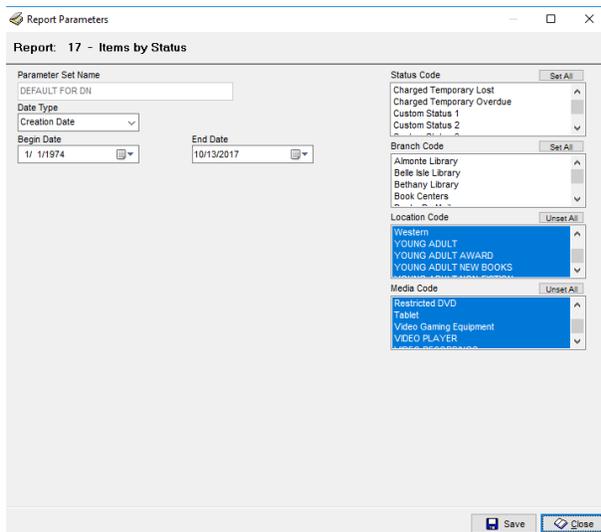
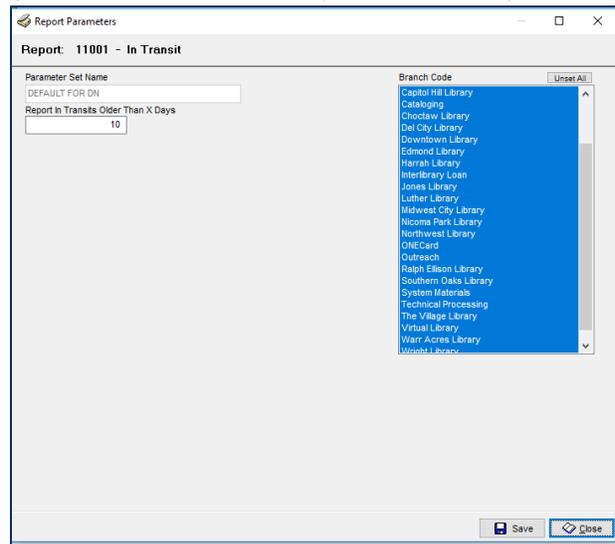
7. Action buttons

- **Remove** – highlight a report in box #6 and click Remove. It will delete that copy of the report from your computer.
- **View** – highlight a report in box #6 and click View. This will open the report in the default file format.
- **Close** – this will close the dialog box.

PARAMETERS WINDOW

Each report has a different set of parameters that you can change to make the report most useful to you. You access these settings by clicking View/Edit Parameters (Box #3 above).

Some reports have very few settings you can change:



Some reports have a lot of settings you can change:

All the reports have the **Save** and **Close** buttons at the bottom right. Be sure to **Save** your changes before closing this window or your settings will revert to those used the last time the report was run.

When we talk about the settings to change for your reports, this is where you find them.

WHERE THE REPORTS ARE SAVED

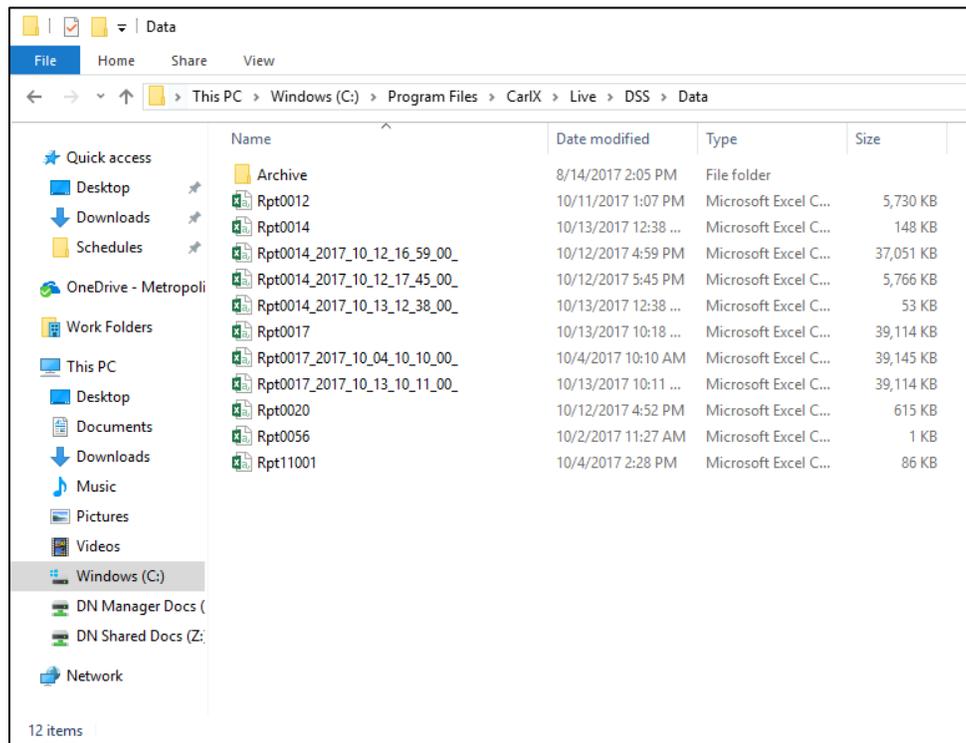
Sometimes, the information that you are looking for is located quickest by looking at the raw data instead of in the report that is formatted for you when using the View option. To look at the raw data, you'll need to know where to find the report on your computer.

When you click **Transfer** to put a copy of the report on your local computer, it always saves it to the same location on your computer. This makes it easy to find the data and for other files/macros/templates to locate it and manipulate it. Always transfer the file.

You can find your reports on your computer in the file path C:\Program Files\CarlX\Live\DSS\Data.

Using your File Explorer window, double-click on each of the words in that path to find your stored reports.

This is what it looks like on my computer:

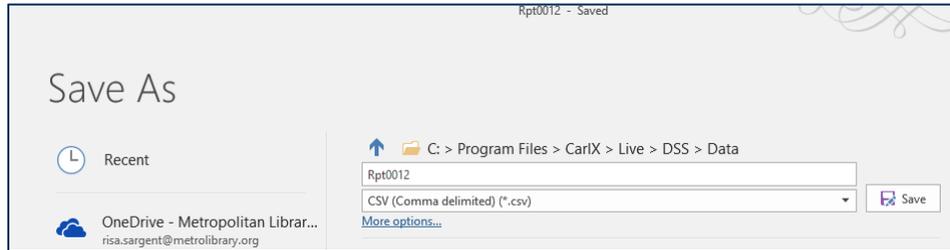


HOW THE REPORTS ARE STORED

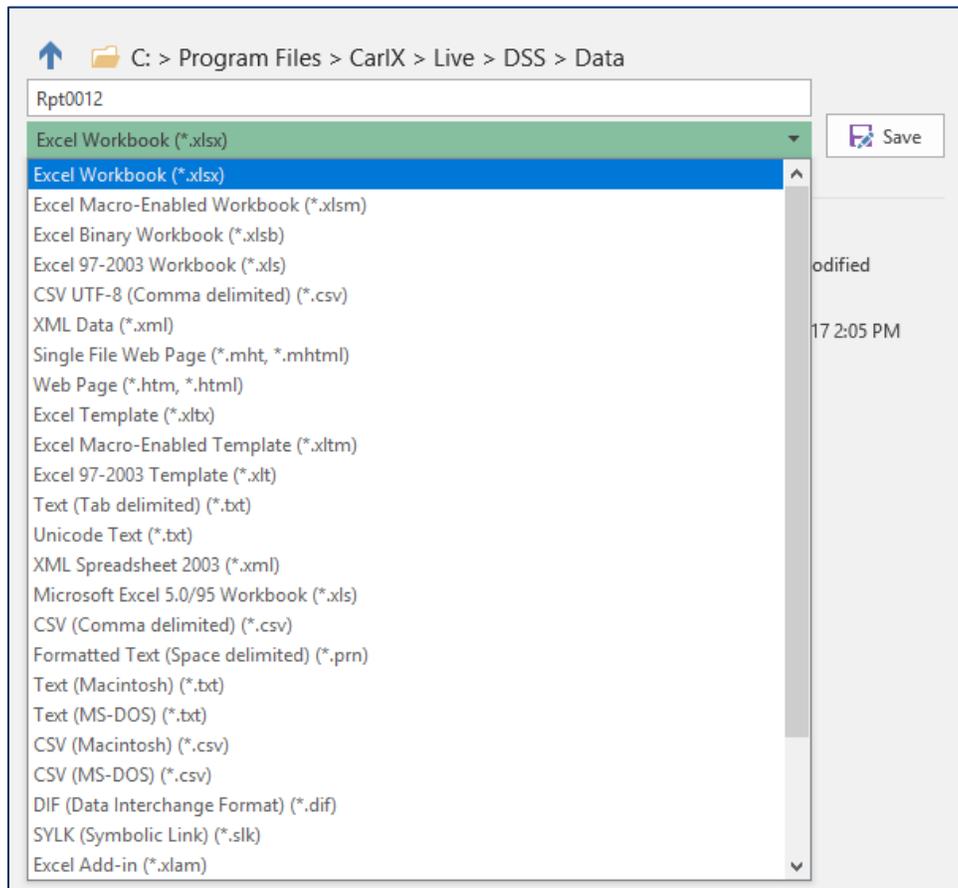
All the reports stored in this location are stored as a CSV file. CSV stands for **comma separated values**. This means that the information in the report is stored in a file in a long string of information and each value is separated with a comma. When you open the file, it opens in Excel. Excel knows to put each value between commas in a different cell.

If you want to manipulate the data in any way by adding filters, adding different tabs of data, or making changes, you will want to save your file in a standard Excel format (xls or xlsx file extensions) or your changes may be lost when saving it as a CSV file.

This is what it looks like if you are saving as a CSV file:

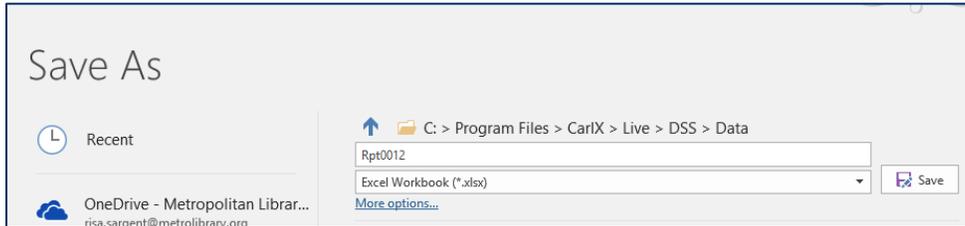


Select the drop-down option next to **Save** to change the file type you are saving as:



You can select either Excel Workbook (*.xlsx) or Excel 97-2003 Workbook (*.xls). The difference is that xlsx files have more features available when you are using a newer version of Office than 2003.

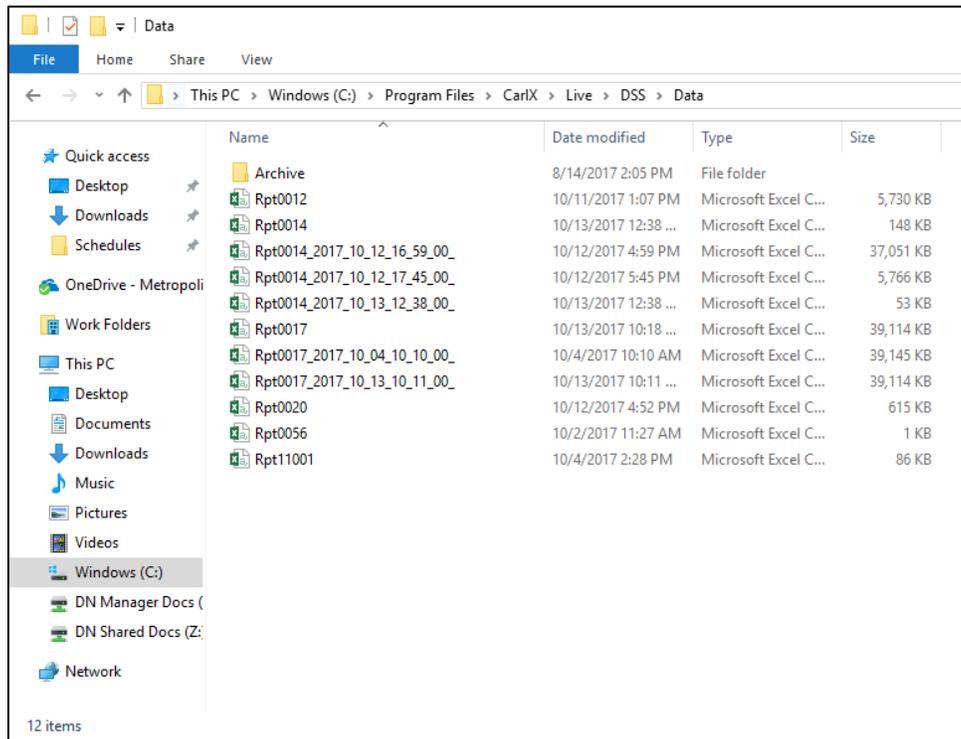
This is what it looks like when you are saving as an Excel file:



HOW THE FILES ARE NAMED

When you transfer a new copy of a report to your computer, the newest copy is named 'RptXXXX' where the X's are the number of the report as shown on the report menu.

Any older copies of that same report that are on your computer will be renamed with the date and time of the transfer appended to the end of the filename.



In the example above, I have 4 copies of Report 14 on my computer. The newest one is named Rpt0014. The older ones have the date and time after Rpt0014. This is the date and time that I transferred the report, not necessarily the date the report was run.

TEMPLATE VS MACRO

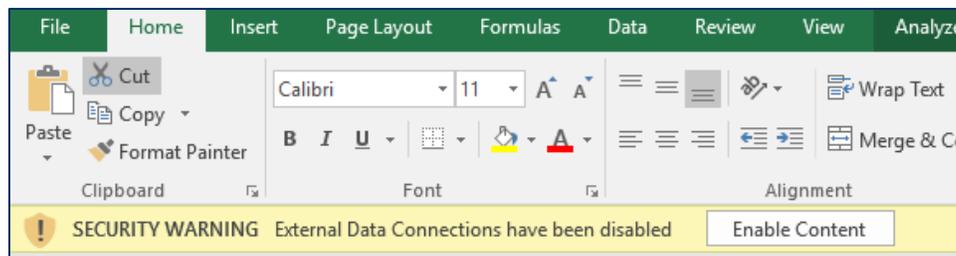
There are several files available to you that will automatically manipulate the data in these files on your computer so that you don't have to. One type is called a **template** and the other is called a **macro**.

TEMPLATES

Templates are files that basically put a pretty skin on the data in the CSV file. The template knows where the data is stored and then shows it to you in a pre-determined format that is easy to interpret and print. Some templates are stored as a part of CARL.X's files. When you click View on the Reporting Window, a template stored on your computer displays the information to you. You might like the way it displays, or you might want to see it formatted differently.

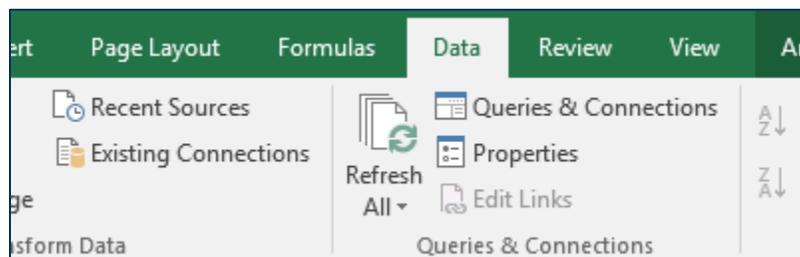
Templates have been made available through the Library Management Team SharePoint. All you need to do is open the template that you want. Excel will open, find the data, and then show it to you in the predetermined format.

You may need to tell Excel that it can look for the data it needs by clicking **Enable Content** when Excel opens.



If the data still doesn't look right after that, you may need to tell Excel to **refresh the data**. That means it might be remembering the data that was available when the template was created. You want it to use the most recent data available though.

On the Data tab, look for the **Refresh All** option and click it. You do not need to click the drop-down option. Clicking the icon will do what it needs to do.



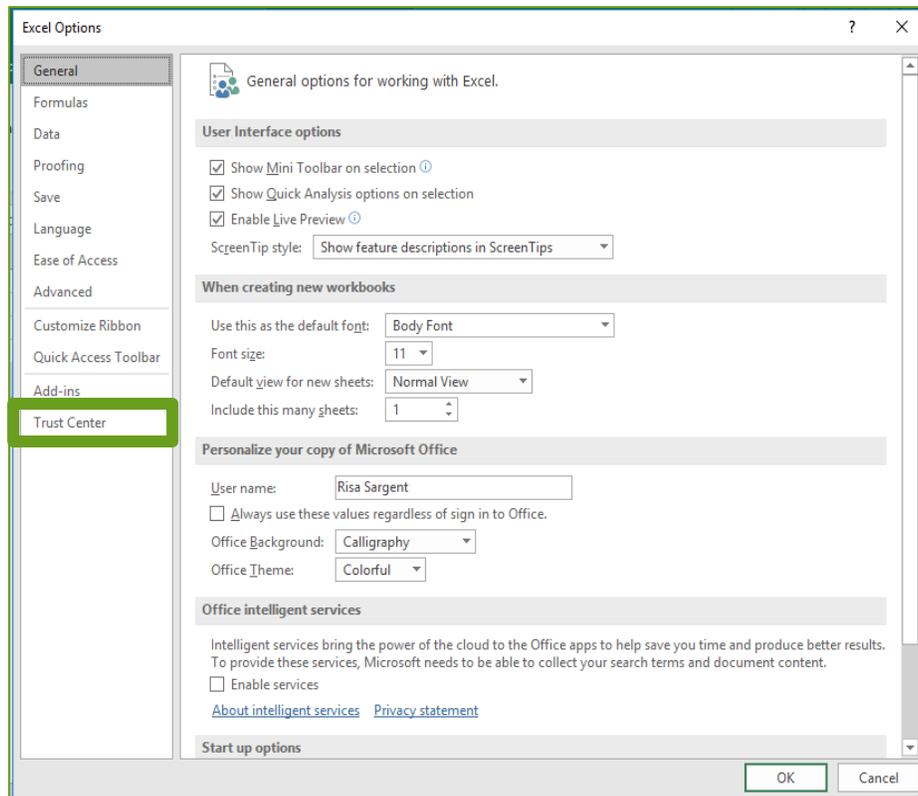
MACROS

Macros are files that have bits of code inside them. The code might run automatically when you open the file, or you might need to interact with the file in some way to make the code run. If Macros are not enabled by default on your computer, you may see the security warning shown above. Simply click **Enable Content** and the macro will run.

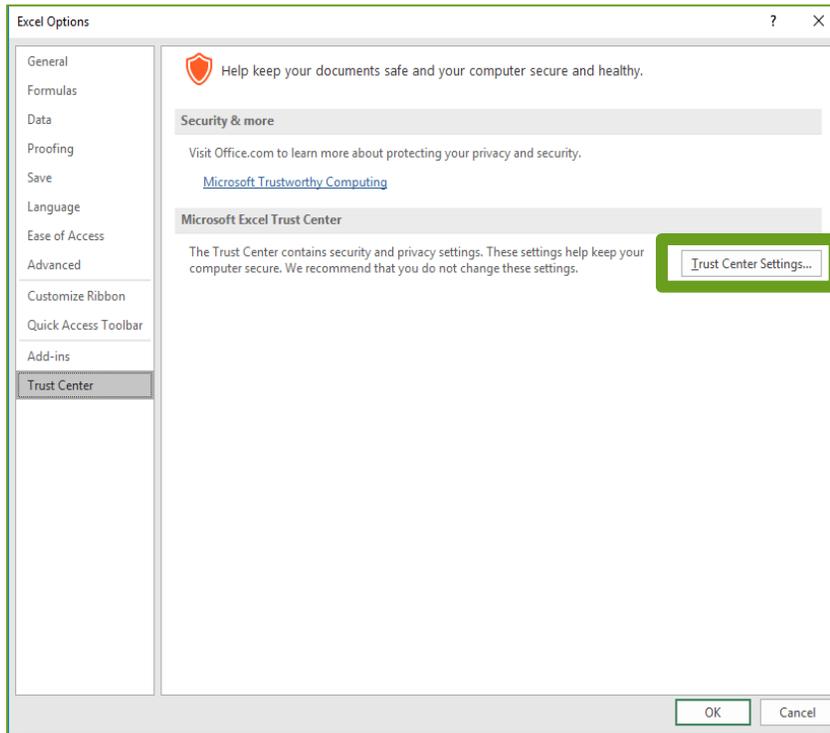
If you use a file with macros in it often (like the Weeding script), you will want to **Enable Macros** by default on the machine you're using most often.

While in Excel, click **File** and then **Options** (or Excel Options if you have the older version of Excel).

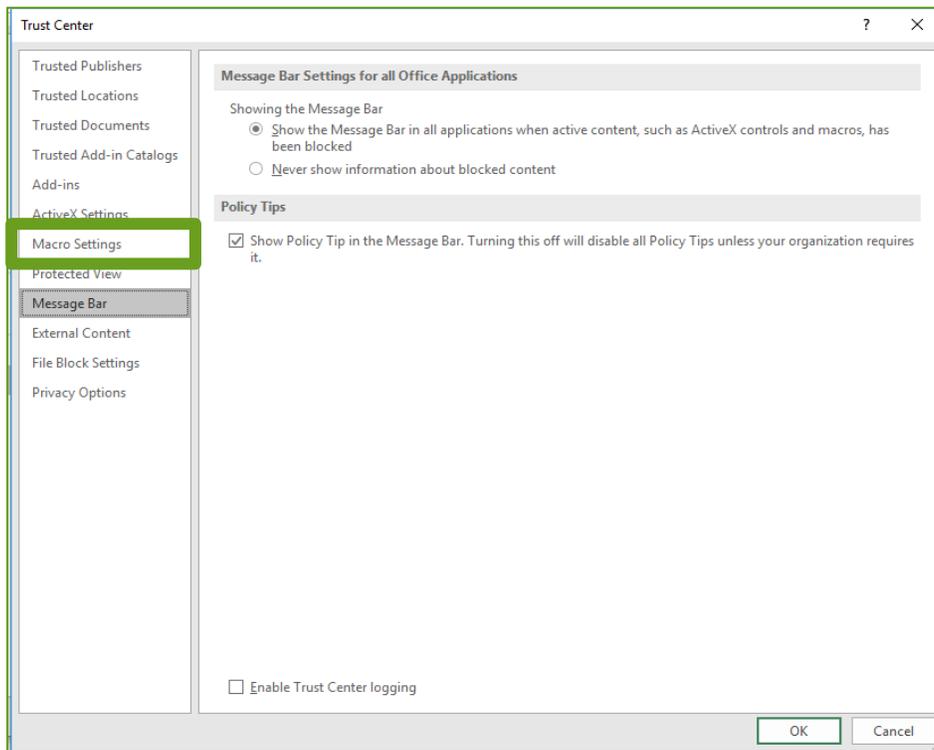
In the window that appears, on the left side, select **Trust Center**.



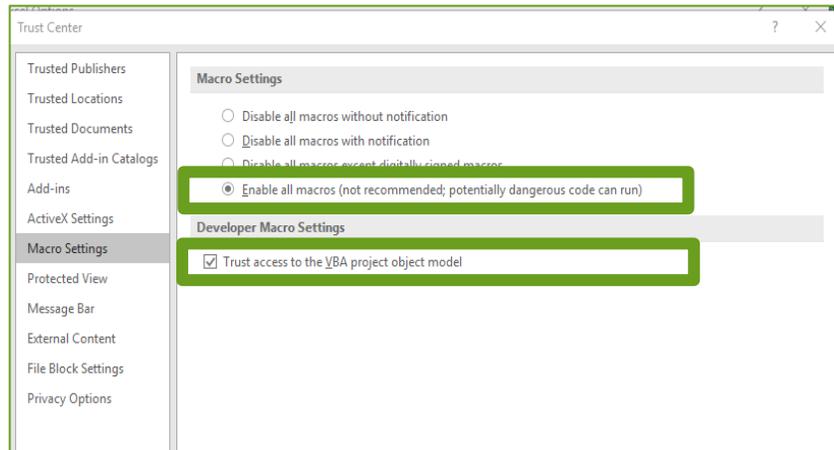
The options on the right side of the screen will change. Select **Trust Center Settings**.



Another new window will appear. Back on the left side of the new window, select **Macro Settings**.



Finally, select **Enable All Macros**, and check the box to **Trust Access to the VBA project module**.



CARL REPORTS: HOW TO RUN AND WHEN TO USE

COMMON CARL REPORTS

Some reports should be run daily and weekly.

Report	When to Run
Report 80: Holds Expired	Daily
Report 61: Tracer	Daily
Wander list (CARL.Connect)	Daily
Report 62: Claims Never Had	Wednesdays
Report 11001: In Transit	Wednesdays
Report 17: Missing Status	As needed if inventory isn't completed twice per year
Report 20: Lost	As needed if inventory isn't completed twice per year

1 – PATRON LIST

WHAT IT IS

This is a flexible report that lists accounts by Default Branch, Registration Branch, Last Activity Branch, or Last Edited Branch.

HOW TO USE IT

- Parameter = your library
- Branch Type = Default Branch, Registration Branch, Last Activity Branch, Last Self-Service Activity Branch, Last Edited Branch
- Date Type = Registration, Expiration, Last Activity, Last Self-Service Activity, Edited
- Begin & End Dates

- Branch Code
- Borrower Blocks (statuses) = select if you want to see accounts with a particular type of block, a good status, or all statuses
- Borrower Type Code (account type)

WHEN TO USE IT

When you want to know more about account holders using your library or using your self-checks, this can be a good report to play with.

This report does not provide the employee aliases associated with the Registration or Edited Dates.

Potential uses for this report:

- Find out how many new registrations your branch had on a specific day (Registration Branch + Registration Date)
- Spot check data entry

UNDERSTANDING THE DATA

- Last Action (Activity) Date - The date of the most recent transaction activity that occurred on the account. Transaction activity includes item checkout, item renewal, hold placement and fine payment.
- Registration Date = Date the account was created.
- Email Status: 0 = No, do not send email; 1 = Yes, do send email; 2= bounced email; 3 = opted out
- Collection Status = all accounts will have a '1' here. MLS does not send accounts to (financial) collectors.
- Self-service Activity = Self Service activity is SIP2 activity (where an application checks to see if the individual has a library account), including logging on to view account information online, accessing online databases, or using a Self-Check machine.
- Last Edited Date = The date that the account registration information was updated.
- Last Edited Branch = The branch that the updated occurred.
- Registration Branch - The Branch where the patron registration occurred.
- Default Branch = The Branch selected as their home location.

Options for data review:

- When using **Registration Date:**
 - Registration branch = registrations at the selected branch(es) during that time period
 - Default branch = registrations where the Default branch was set to the selected branch(es); this might tell you if people are registering for accounts at a different branch but select yours as their default; you may see more ECARDs with these settings

- Last Activity branch (and Self-Service Activity) = accounts that were registered within the designated period AND were most recently used at the selected branch(es)
- Last Edited branch = accounts that were registered within the designated period AND were most recently UPDATED at the selected branch(es)
- When using **Last Activity Date:**
 - The date period reflects if any activity on the account during that period.
 - Registration branch = most recent activity based on where the account was registered. The activity does not have to occur at the Registration branch to be included.
 - Default branch = most recent activity listed by the selected default branch(es). The activity does not have to occur at the Default branch to be included.
 - Last Activity branch (and Self-Service Activity) = most recent activity based on the location the account was last used at
 - Last Edited branch = most recent activity based on the account being UPDATED at the selected branch(es)
- When using **Expiration Date:**
 - The date period reflects if any accounts have expired during that time frame.
 - Selecting the Branch Type will narrow which expiring accounts you will see. We use Default Branch for reviewing Annual Fee accounts.
- When using **Last Self-Service Activity Date:**
 - The date period reflects if any accounts have been used to log into their library account online or used their library account to log into a library service.
 - Selecting the Branch Type will narrow which accounts you will see.
- When using **Edited Date:**
 - The date period reflects if any account registration information (address, phone number, etc.) have been updated/edited during that time frame.
 - Selecting the Branch Type will narrow which accounts you will see.

8 – REGISTRATION BY BRANCH

WHAT IT IS

This report displays the number of active and expired patrons by their default branch and patron type. The count can be limited by the default branch, patron type and a date range, which is based on the patron's registration date. Information is grouped by branch and then patron type. For each patron type, a count of active patrons and expired patrons will display, will row and column totals for each. A grand total of active, expired, and total patrons is at the end of the report.

HOW TO USE IT

- Parameter = your library
- Beginning & End dates
- Branch Code = your library
- Borrower Type Code

WHEN TO USE IT

You might use this to determine how many active patrons there are during a specific date range.

UNDERSTANDING THE DATA

The data comes back as a table with the borrow type in one column and active, expired, and total number of borrowers in columns two, three, and four. The total is at the bottom of the list.

10 – CIRCULATION BY CALL NUMBER

WHAT IT IS

This lists every circulation transaction by the call number. You can use a pivot table to get transaction counts by call number. Not very useful to analyze individual item usage because there may be numerous titles with the same call number. Items by Status is more useful for analyzing circulation and collection information.

HOW TO USE IT

- Parameter = your library
- Beginning & End dates
- Beginning & ending call numbers
 - For Fiction, include "Fiction" as the call number; "FICTION A" to "FICTION zzz"; using uppercase for "FICTION", uppercase for "A", and lowercase z's
 - Must set specific call numbers or it will overflow the report (have more data than Excel can handle). It's best to choose Fiction style call numbers OR ANF style rather than use both in the same report.
- Media codes
- Create a pivot table in Excel with your favorite fields

WHEN TO USE IT

You may want to check how some call number ranges circulate over others - perhaps whether visibility or location within the library is an issue.

UNDERSTANDING THE DATA

- Date = date of the transaction.
- Transaction Types
 - Charge, Discharge, and Renew
 - Charge and Renew will always show a Patron Type; looking at the Patron Type can help you identify if there are unexpected patron types checking out a particular type of material. For example, are student accounts checking out Large Print materials? If so, what would that say about your community need?
 - Discharge will show Patron Type if it was checked out when it was discharged

- Count - If there are multiple transactions that match date, transaction type, location code, media, and patron type, the count will be more than 1.

12 – CIRCULATION BY TIME

WHAT IT IS

This report tracks transactions by date/time for each library. It includes the Location code being transacted as well as the customer type.

HOW TO USE IT

Since this has an enormous amount of data, therefore, it's not recommend using more than 3 months' worth of data at a time.

- Parameter = your library
- Beginning & End dates = no more than 3 months at a time (depending on your library circ volume) or you risk crashing Excel
- Include all DS Transactions = "No" if you want to include true in house circs, "Yes" if you want in house circs to be excluded.
 - Note: only true in house circs can be calculated with dates after 2/14/23.
- Transfer the file
- Open one of the templates below to view the data.
 - By Weekday is useful when you filter by the name of the weekday. You can either type in the 3-letter day name or click each checkbox for the day of the week you want to review

WHEN TO USE IT

You may want to see trends in circulation/usage throughout the day at your library. This could help with determining staffing levels at various times.

UNDERSTANDING THE DATA

- Discharge is triggered by the following actions. Each could also result in a hold label:
 - Checking in off an account
 - Checking in from In Transit (delivery)
- On Shelf Return is triggered by:
 - Browsed item checked in
 - Material pulled to fill a hold checked in
 - Material for hold checked in again at a station with hold label printer
- Charge = checkouts only
- Renew = renewals only

FILES AVAILABLE

- Circ by Weekday and Hour Template
- Circ by Month and Hour Template

14 – CIRCULATION BY BRANCH

WHAT IT IS

This report reports back all your branch's circulation transactions. You can use a pivot table to view your circ stats over time since we started using CARLX.

HOW TO USE IT

- Parameter = your library
 - Begin date = 9/2/2014 (if you want to see all data available)
 - End date = last day of the previous month
 - Include all DS Transactions = "No" if you want to include true in house circs, "Yes" if you want in house circs to be excluded.
 - Note: only true in house circs can be calculated with dates after 2/14/23.
 - Save, run, transfer
 - Use the Circ Stats Template to open the file you transferred. You may need to enable data connections when you open the file.
 - Do a Save As to keep your template for the next round of data.
 - Use the filters at the top of the pivot table to view your different collections by location code and/or media code.
 - You can also add in a pivot chart to chart the data.
-

WHEN TO USE IT

Anytime you want to see how your circulation is doing. Running it monthly on or after the first day of the month will let you gather all circs from the previous month and beyond.

UNDERSTANDING THE DATA

- Transaction Types
 - Charge = checkouts only
 - Discharge = the item was scanned through the Return function but did not have an On Shelf status; Discharge numbers are higher because it also counts In Transit materials checked in from delivery and In Transit Holds being received, these are identifiable because no patron information is connected to the transaction
 - On Shelf Return = the item was scanned through the Return function while On Shelf; this includes when morning holds are pulled and scanned to generate a hold label
 - Renew = renewals only
 - Count = this aggregates the total number of transactions for this type, patron type, media, and location code for that date
-

FILE AVAILABLE

- Circ Stats Template

WHAT IT IS

This report gives a complete inventory of your collection. This report has so much flexibility, it's the basis of several other lists you can create.

HOW TO USE IT

Settings available:

- Date Type
 - Creation date = the date the item was created in CARLX
 - Status date = the date that the status (on shelf, withdrawn, missing, etc.) changed the last time. Ignores changes to the item record
 - Modified date = reflects the Edit date
 - Changes to status (charged, on shelf, lost.)
 - Stored in Last Circulation Date– since the last year when we changed how Edit item/status date works
 - Includes manual changes to status of not on shelf, withdrawn, missing, etc.
 - Change to item record (location/media/branch)
 - Begin/End date = depends on which date type you're using and for what
 - For a full inventory = Creation date 01/01/1975 to current date
 - To check for new items added to your collection = Creation date and dates you're looking for
 - To look for when material was coded missing/withdrawn = status date and a single date or date range
 - Status codes = depends on what you're looking for
 - What's on my shelf right now? = Shelf (only)
 - What's in my collection? Charged, In Transit, Shelf
 - In Transit Hold and Hold Shelf are not entirely reliable. In Transit Hold is usually accurate for your owned items. Hold Shelf owning location will show as the location it's on the Hold Shelf.
 - What's missing from my collection? Missing, Withdrawn, Lost
 - Location Codes
 - Media codes (when looking for books, be sure to select both Books and Paperback Books)
 - Save, Run, Transfer
-

WHEN TO USE IT

You can use this report for generating weeding lists (and actually weeding), doing inventory, checking for or finding miscoded items, reviewing your new items, and generating lists to create your new item displays.

If your library is not completing inventory twice per year, this report needs to be run to check for items with "missing" status.

UNDERSTANDING THE DATA

- Prefix = not used by MLS
 - Call Number = depending on when the item was created, the call number may or may not be affected by its location
 - Y = may be attached to the beginning or absent altogether
 - J = is attached to JNF and TNF material
 - Fiction styles (adult and children) include the location prepended to the author code
- Status = see the CARL Manual for a full list of statuses
- Price = replacement cost charged to customer if lost or damaged
- Media = for books, remember to select both Paperback Books and Books
- Circulation = # of times checked out or renewed since beginning of fiscal year (July 1)
- Cumulative Circulations = lifetime checkouts and renewals
- Last Circulation Date = Last time checked out, returned, or renewed
- Creation Date = Date added to the inventory/barcode created
- Edit Date = Date the item was manually edited; location code, branch code, etc.

FILES AVAILABLE

- Missing
 - This report needs to be run if inventory is not being performed twice per year.
 - The status should be set to "missing" with the date range selected based on the last time missing material were searched or when inventory last ended.
- Weeding Script
 - When you first run this script, you select a collection to work with. Then, it creates an Inventory List, 24 month no-checkout list, and 100+ circs list. It also creates a statistics page for each of those lists.
 - After running the initial lists, you can drill down and create custom lists based on almost any criteria.
 - You can also run a shelf audit on any inventory list you create.
- New Items
 - This will pull all the items that were added to your collection since the previous Sunday. It sorts them into different tabs/collections for easy browsing.
- New Items Display
 - This is similar to the New Items report, but it will only pull items that are currently on shelf = no matter what statuses you listed in Report 17. It will also allow you to pull all items added after a specific date or you can choose to pull the most recent **X** number of the newest items, however far back that goes.
 - To make this the most useful, you will want in CARL.X to set only the location codes that you want to use for your display. So, if your SciFi new items area is looking pretty bare, be sure to only select SF as your location code.
- All Libraries DOA Report
 - Created by CSD February 2021.
 - Auto filters for under 5 copies and under 5 checkouts
- Libraries DOA Report

- Created by CSD February 2021.
- Auto filters for total circs under 2.

20 – LOST ITEMS REPORT

WHAT IT IS

It lists all materials that are coded Lost or A9/Lost/Paid. Materials coded Lost are still associated with an account. Materials coded A9 are not associated with an account. The goal is to hopefully find materials before they go A9 because if you find them after they go A9, it means that someone was charged for it, paid it, but it was really on the shelf.

HOW TO USE IT

Settings to use:

- Parameter = your library
 - Start date = the last date you ran it. If you've never run it, start with 9/2/2014.
 - End date = today
 - Branch code = your library
 - Save your parameter settings
 - Click run. When it completes, click Transfer.
 - Use the associated macro to format it nicely for searching and printing.
 - Mark off items you do not find so the next person searching knows what has been searched for.
 - If you find any item on the list, check it in. If it is A9, you're done. If it has a library account associated, go to that account and cancel the fines.
-

WHEN TO USE IT

This report needs to be run if inventory is not being performed twice per year.

FILE AVAILABLE

- Lost Items Macro

30 – CIRCULATION STATISTICS

WHAT IT IS

This report displays counts of circulation activity for charge, renew, discharge (return), and on shelf returns limited by the branch where and the date when the transaction occurred. A count is displayed for each combination of date, branch, location, media, transaction type, and patron type.

You can use a pivot table to view your circ stats over time since we started using CARL.X and filter by patron type.

HOW TO USE IT

- Parameter = your library
- Beginning & End dates
- Include all DS Transactions = "No" if you want to include true in house circs, "Yes" if you want in house circs to be excluded.
 - Note: only true in house circs can be calculated with dates after 2/14/23.
- Branch code = your library

WHEN TO USE IT

Anytime you want to see how your circulation is doing and see it by patron type. Running it monthly on or after the first day of the month will let you gather all circs from the previous month and beyond.

This is similar to Report 14 – Circulation by Branch but it also includes patron type.

UNDERSTANDING THE DATA

- Date = date of the transaction.
- Transaction Types
 - Charge, Discharge, and Renew
 - Looking at the Patron Type can help you identify if there are unexpected patron types checking out a particular type of material. For example, are student accounts checking out Large Print materials? If so, what would that say about your community need?
 - Discharge will show Patron Type if it was checked out when it was discharged
- Count - If there are multiple transactions that match date, transaction type, location code, media, and patron type, the count will be more than 1.

FILE AVAILABLE

- Circ Stats 30 Template

60 – CLAIMS RETURNED LIST

WHAT IT IS

This used to be used to generate a list of materials that were marked Claims Returned. Since we are currently only using Claims Never Had, this list should be empty now. If there are items in it, you know that someone is using Claims Returned.

HOW TO USE IT

- Parameter = your library
- Run, Transfer, View.
- If it's empty, no further action is needed.

- If something is on the list, correct the mistake by going into the account, navigate to the Claimed radio button, highlight the item, at the bottom you can select options – remove. Then navigate to charges/overdues/lost (based on the due date), highlight the item, and select Claims Never Had.

WHEN TO USE IT

It should be a defunct list at this point.

61 – TRACER LIST

WHAT IT IS

This is the list of items that have been placed on Trace that may be at your location. They are generally either a System trace or a Local trace. System traces are automatically generated when an item has been in transit for too long (more than 10 days). Items appear on the Tracer list 3 times. After that, it is automatically coded missing if it is not checked in.

HOW TO USE IT

- Parameter = your library
- Run, Transfer, Print
- Search for each item on the list in every possible location.
- If found, check it in.
- If not found, move on to the next one. No need to take action. It will automatically go LOSTNMISS.

WHEN TO USE IT

This list needs to be run and searched for daily. Different items show up on the list each day. Items show up on the list 2, 16, and 30 days after it's coded "Trace". At the end of the cycle, it goes to A9LOSTNMISS status.

62 – CLAIMS NEVER HAD LIST

WHAT IT IS

This is the list of items that staff have marked as Claims Never Had. It will grow and grow unless items are checked in and marked missing. We want to remove items from the list and mark them missing so that the database of items is up to date and can occasionally be purged of items that are no longer available.

HOW TO USE IT

- Parameter = your library
- This report needs to be run weekly on Wednesdays.
- Begin date = 9/4/2014
- End date = today

- Run, Transfer, View & Print
- If you locate an item, check it in.
- If the item has been on the list for 4 weeks and you haven't found it, check it in and then code it Missing.

WHEN TO USE IT

This report is run every Wednesday so that materials are searched for 4 times before they are coded Missing.

80 – HOLD EXPIRED LIST

WHAT IT IS

This report is the list of holds that have been on the shelf for 7+ days. They need to be pulled and checked in.

HOW TO USE IT

- Parameter = your library
- Run, Transfer, View & Print
- On the Holds shelf, remove each item on the list.
- If it is missing from the Holds shelf, contact the guest and find out if they have the item.
 - If they do, you can check the item out to them.
 - If they don't have the item, check the item in as Damaged and update the status to Missing. The guest will go first in queue for a new copy.

WHEN TO USE IT

Run this report every day the library is open.

11001 – IN TRANSIT

WHAT IT IS

This report will show all the items that have been In Transit for more than X days. The default is to only show you items that are In Transit TO your library. You can also use it to find items that are In Transit FROM your library. Items that stay In Transit for more than 10 days get traced and added to the Tracer list. Materials that are Hold In Transit do not get traced and stay on this list until processed off the list.

HOW TO USE IT

- Parameter = your library
- Report in Transits older than = 10 days
- Controlling Branch = Both
 - If either "in transit to branch(es)" or "in transit from branch(es)" is selected, it will pull items for your location only

- Branch Code = set all
- Run, Transfer, & View
- There is a TO and FROM for each library. Find the ones for your library and print them.
- What to do
 - Search your shelves, both the Hold Shelf as well as regular shelves for the item.
 - If found, check in so that the status is updated. Route appropriately.
 - If not found AND on your From list for a second week:
 - Email the owning location (check in CARLX to find out)
 - If it's not at the owning library, check the item in as "Damaged" and code it missing. The guest will go first in queue for a new copy.
- Items To/From Technical Processing (TP) or Cataloging (CAT) should automatically be coded missing in week one.
- Items To/From ILL, staff should reach out to ILL on how to proceed in week one.
- Items To/From EDMP, staff should reach out to Books by Mail/Outreach in week one.

WHEN TO USE IT

This report is run every Wednesdays to catch items that have been in transit for too long.