# **Recommended Collection Maintenance Reports**

The following reports assist libraries with maintaining the accuracy of their local collection data.

### **Claims Returned**

Libraries may mark Claims Returned items Lost after 45 days from the due date. For assistance identifying these items, use:

Quick Reports > Quick Report Templates > Items > List of Items Marked Claims Returned

See also: Claims Returned Items

### Holds

#### **Expired Holds:** To identify expired holds that are currently on your holds shelf, see: Clear Holds Shelf

**Hopeless Holds:** To identify holds that cannot be filled because all copies on the record are unfillable. See: Hopeless Holds

#### **Uncaptured Holds:**

To identify holds where an item has been targeted but the item has not been found.

Quick Reports > Quick Reports Templates > Holds > Unfilled Holds (Not Captured)

### Inventory

See: Inventory using existing Evergreen Functionality

### **Item Status Report**

Get lists of items of a particular status (Missing, In Process, etc.) in order to do shelf checks.

*Quick Reports > Quick Report Templates > Items > List of Items by Status* 

## Long Overdue Items

See: Long Overdues

# **Pre-Cats**

Pre-cat (pre-cataloged item) records are temporary records used for Interlibrary Loan or to allow checkouts of items that have barcodes but no record in the catalog. Pre-cat records should be used for temporary purposes only and should be corrected (or deleted, in the case of ILL) when the item is returned to the library.

Quick Reports > Quick Reports Templates > Items > Pre-Cat List

See also: Instructions for managing Pre-Cats

# **Transit Reports**

Transit reports can help you to identify items that have been put into the transit status but have not been scanned in at their destination. You can retrieve transit reports through a built-in staff client function or through a report, depending on your needs. Items identified this way should be looked for at both the sending and receiving libraries.

See: Clear Items In Transit

# Weeding Report

Quick Reports > Quick Report Templates > Items > Basic Weeding List

The Basic Weeding List is meant to provide a list of possible items to consider for weeding. Each item on the list should be reviewed on its own merits (see Slideshow link below for tips.

Report filters:

- Use Count (Less than): This is the number of total circulations over all time. If you want to list items that have circulated less than 10 times since they were added to the collection, enter 10. If you want to only list items that have never circulated, enter 1.
- Shelving Location Name (Substring): Enter part or all of the name of the shelving location that you are weeding. This report filters by shelving location in order to make the results manageable and because you will likely have different weeding requirements for each section of a branch.
- **Callnumber Label (Between):** This filter allows you to focus on a specific section of a large shelving location. If you want to weed everything in the Dewey 200s, enter 200 and 300 to capture everything between those call numbers. If you want to look at the entire shelving location, enter 0

(zero) in the first box and zzz (lower case) in the second box.

- **Status (In List):** In many cases, you would only look at items in the Available status to consider for weeding because if an item is Checked Out then it means there is current interest in it. However, this filter allows you to select as many other item statuses as you wish. By selecting all statuses, you may identify some items that are in incorrect statuses as well, such as items in "Canceled Transit" status that are actually on the shelf.
- Last Circulation Date (Before): This filters out any items from the list that have circulated recently. If you don't want to weed anything that has circulated in the last 3 years, then select a date 3 years ago.
- Organizational Unit ID (In List): It is best to only circulate one branch per report.

See also: Weeding and Inventory Slideshow

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Permanent link: https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:maintenance-reports

Last update: 2023/09/05 15:03

