Overview of Systems Emails and Reports

Throughout the year, various reports and emails are generated that require action by Collection Management Staff. The following is a list of these reports and emails with a short description for each. All of these reports or emails should be searched at least once, but some may require additional searches. Ideally, subsequent searches should be made several days apart by two different people. Statistics for these searches should be entered on your library’s Collection Management statistics page.

You may additionally encounter reports or emails that are generated from projects. These reports will have their own work flow, and instructions for project work should accompany these reports.

Not every unit will receive all of the reports listed below. Reports dealing with collections of new books will only be generated for libraries that have a new book collection.

Bi-Weekly Missing Book List: This bi-weekly email lists the items charged to your library’s missing book user within the last two weeks. Books that are found on the list should be discharged and shelved appropriately in the collection. This report generally is searched multiple times, and the number of times is determined at the unit level. Items that are not found will be reprinted on the Quarterly Missing Book reports.

In-Transit Lists: There are two reports that are generated simultaneously on the 14th of every month. Items that are In-Transit to your library for over 15 days will be recorded on the “In-Transit to” list. Items that were sent from your library to other locations but are still In-Transit after 15 days will be recorded on the “In-Transit from” report.

If items are found on either report, discharge them and route them to the appropriate location. Items that are not found after two months are automatically charged to the home library’s missing user.

Stacks Check: These emails are issued from individual staff members and are sent out to the Access Services mailing list. The most common reasons to send out a Stacks Check search is to follow up on a patron’s Claims Returned request or to locate materials that should be on hold for a patron but are not on the appropriate hold shelf.

The number of times a Stacks Check request should be searched varies depending on the reason for initiating the search. Claims Returns are checked three times within the span of two weeks, while hold shelf requests are usually only checked once. All libraries participate in all searches. If the book is found, the staff member who requested the search should be notified. A separate email to the Access Services distribution list should be sent to notify the other units that they can stop searching for the material.

Quarterly Lost-Paid, Lost Replaced, and Missing book reports: These three reports are run at the same time every year in the months of July, August, November and April. The
reports are a cumulative collection of the books that are currently charged to Lost-Paid, Lost Replaced, and each unit’s individual library missing user. The span of time being examined by each report varies during the year.

When the reports are finished they are made available in a folder on the Alexander library’s T-Drive, and an email is sent to the Access Services distribution list. You should notify your local billing coordinator if any books are found on either the Lost-Paid or Lost Replaced lists. Books that are not found on the Quarterly Missing Books lists that have been charged to Missing for over two years are expunged from the catalog.

**Alexander library Recon project list:** There is one report that is run with the quarterly reports that only affects the Alexander library. Items were added to the Alexander library’s catalog when the physical card catalog was removed and all records were transferred online. These items have auto-generated barcodes and were never physically verified during the process.

Books found on this list will not have matching barcodes, or may have no barcodes at all. All books found with the matching call number should be brought to the Alexander library’s Collection Management Coordinator. A separate set on instructions exists on how to process these materials.

**New Book Shelf Pull list:** If your library has a new book shelf, you may receive an automated report periodically which instructs you to remove books from the new book shelf and shelve them in their appropriate collections. Typically, these reports are generated once a week on Fridays. Items found on the new book shelf should be removed from the new book shelves and routed to the proper location for shelving.

**New Book Shelf Inventory:** If your library has a new book shelf, you may receive a monthly report that allows you to quickly inventory what books should be on the new book shelf. This report is typically run on the second Monday of every month. Items that are found on this report should stay on the new book shelf.

Any items that are not on the list should be pulled from the new book shelf and should be scanned with the “Check Item Status” wizard. All items should be available in their appropriate collection in your library. If an item is listed as Missing or In-Transit, that item should be discharged and the appropriate steps, such as shelving the book or placing it on hold, should be taken. If there is another problem with the material, report it to your local Collection Management coordinator.