

Here is a list of the basic reports *every* WALS library needs to run/view and where to find them:

(In order by importance, sort of)

- **Clean Holds -- in WorkFlows—Reports.** Needs to be done daily. This catches any cancelled or expired holds on your holds shelf. Just using the date to clear holds misses holds that the patron cancelled. IF an item appears on your list and is not on your holds shelf (or regular shelf), it needs to be marked MISSHOLD. [More Info.](#)
- **List MISSHOLD – in Analytics→Shared Reports→For Libraries→Item Lists.** This should be run at least weekly to look for items that were on your Clean Holds shelf report but weren't found on your holds shelf. [More Info.](#)
- **List Renewed Users – in Analytics→Shared Reports→For Libraries→User Lists.** This should be run at least monthly to check the patron record and make sure that their User Cats match their address.
- **List Users Registered Online – in Analytics→Shared Reports→For Libraries→User Lists.** This should be run probably at least weekly to at least check for duplicates and/or mis-coding. Some libraries use this list *daily* to create “real” cards for patrons immediately and then mail them USPS to validate the address. This practice makes getting a card a lot easier for the patron. It also allows libraries to cull those duplicate cards more quickly so that people aren't getting extra access to online resources like Hoopla.
- **List Items Claims Returned – ALL -- in Analytics→Shared Reports→For Libraries→Item Lists.** This should be run weekly to look for items your patrons believe they have returned. It lists anything Claimed Returned in the past month. [More Info.](#)
- **List Items Claims Returned –by (Checkout/Item) Library --** One or both of these should be run monthly. Lists all claims returned in the past 365 days. Any items with a Claims Returned Date more than 3 months old need to be set MISSING or WD; and the Checkout library needs to decide whether to bill the patron or not. [More Info.](#)
- **In Demand Not Owned -- in Analytics→Shared Reports→For Libraries→Hold Lists.** This list is already being run for you and being emailed to you monthly. Use this to see what titles your patrons have on hold that you don't own, but maybe you should buy.
- **List Items Missing -- in Analytics→Shared Reports→For Libraries→Item Lists.** This report should be run monthly. The goal is to look for recently missing items (while they still might show up) AND long missing items (that should be checked out to WD). Items that have been missing for over 3-4 months should have any copy-level holds removed(or Title holds if the only copy is MISSING) and the items checked out to WD.

There are more reports that many libraries run regularly, but the above are the minimum required reports.

Here is a list of more reports some libraries like to run/view and where to find them:

- **One of the Holds lists** -- in [Analytics](#)→[Shared Reports](#)→[For Libraries](#)→[Hold Lists](#). For example: List Items >5 holds; List Titles >4 holds; List Holds – Own and Held. These all use different criteria for indicating titles your library might need to buy to meet local demand.
- **List Overdues-2Months** -- in [Analytics](#)→[Shared Reports](#)→[For Libraries](#)→[Item Lists](#). List of items that were due 2 months ago and are checkedout/Lost-Assum. Some libraries use it to look on their shelves, other use it to call patrons.
- **List Overdues-Old** -- in [Analytics](#)→[Shared Reports](#)→[For Libraries](#)→[Item Lists](#). List of items that were due more than 3 months ago. Some libraries use it to look on their shelves, other use it to call patrons.
- **Cash Management** – in [WorkFlows](#). There are many flavors of this report, some for End of Day, some End of Week, some End of Month. This is a way of tracking the \$\$ you took in for fines, lost, damaged, etc; and also for things like garage, donations, Book sales—if you are using the Cash Management module.