Cheat Sheets for Timeline Tasks

Members reviewed the timeline of tasks, adding a few which were omitted and reviewing some parameters:

Daily	**Formatted**	**Create List**
Paging lists (both item and bib)	X	
Expired holds list	X	
Preparing and sending notices (effective Jan., 2014)	X	
Bounced email report, upon receipt from WVLS		
Backdating the check-in of overnight book returns		

Weekly

	Formatted	Create List
Checking the high-demand holds report	X	

– per agreed High Demand guidelines, need to determine
     if should buy another copy or a copy of item if not
     previously owned.

Monthly

Missing items reports   X
- Should run a minimum of every 60 days for several reasons:
    o To search for the item again
    o To determine if library will replace item
    o To determine if library will mark item for deletion
- Should not mark missing items for deletion before they
  have been in this status for at least 6 months.

Billed items reports   X
- This report will advise library if they should be billing a
  check-out library for replacement costs for loss or damage;
  there is only a 60-day window for a library to invoice
  another library

Status update reports (e.g. in processing, transit, etc.)   X
- These will advise the library of items which need to be
  pursued (e.g. lost in transit, failure to check-in after
  processing completed, etc.)

Fines paid (just to look at it-FYI)   X
- For information, discover how much is collected for
  overdues, manual fees, etc., and how much waived
  for a given time period.

Lost & Paid – just added to list   X
- Identify the items in library which have been paid for:
    o To determine if new copy should be ordered
    o To determine if a more current title of same topic
      should be ordered
    o To determine if library will mark the item for deletion

Items coming off High Demand (and FU to high demand)   X
- Identify those items which have been on high demand and available for check-out for more than 4 months in order to:
    - Take the items off high demand if none of your patrons have holds on it
    - Abide by the V-Cat Circulation Guidelines

Changing juvenile patrons to adult ptype   X
- Identify those juvenile patrons who have become adults, so that:
    - New ID# can be acquired from the patron (no longer using the guardian's ID)
    - The patron will be able to check-out restricted items (e.g. R-rated DVDs)

Circulation statistics as needed   X   X

Approved: 2014-02-06