

**Boston College Libraries**  
**Crystal Reports in Circulation Workflow**  
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## Quick Lookups



### [Find Patron Aleph ID and Name by Email Name](#)

- Enter the first part of the user's e-mail address: e.g. for an e-mail address of 'doej@bc.edu', enter 'doej' in the search box.
- Used as needed to retrieve patron information when only email address is known as in returned email.
- Produced as needed
- [View All Patrons with Administrative Blocks on their Record](#)
  - o Creates a list of user ID's, patron name, and delinquency notes for patrons who have administrative blocks placed on their record. For the administrative block to appear on this list, the block must be associated with the user's GLOBAL record.
  - o Used to check for and clear administrative blocks that were not removed.
  - o Produced monthly



### [View Hold Requests for Items which are "On Order" or "In Process"](#)

- Creates a list of *On Order* or *In Process* items which have been requested by patrons.
- Replaces Aleph Services holds report that includes all types of holds/requests
- Produced daily by Acquisitions and Cataloging staff

## General Reports

- [Cash Transactions Report](#) (All libraries)
  - o Creates a list of Aleph user ID's, patron names, libraries and transaction dates for users who have cash transactions associated with their patron record.
  - o Lists fines for returned materials
  - o Produced daily
- [Cash Transactions Report](#) (Selected Library)
  - o Same as above, individual library
- [Count of Loans/Renewals by Title, Library, Collection and Item Status](#)
  - o Creates a list of titles and call numbers with a count of the number of times the title has been loaned and renewed in a given time period.

- o Produced as needed



### Expired Patron Records with Active Loans

- **Creates a list of all patron records which have an expiry date (Z305\_EXPIRY\_DATE) on or before the date entered and which have books charged to them. Includes patron ID, name and expiry date.**
- **Used to contact people that have left the university**
- **Produced quarterly**
- List of Items by Inventory Status and Update Date
  - o Creates a list of books with status: claimed return, lost, missing, or not returned
  - o Includes system numbers, titles, call numbers, update dates (Z30\_INVENTORY\_NUMBER\_DATE) and barcodes for a given library and inventory status (Z30\_INVENTORY\_NUMBER).
  - o Used in missing book procedures, inventory date is updated in Items/Items Form/Inventory date
  - o Produced quarterly
- List of Items by Process Status, Library and Call Number Range
  - o Creates a list of titles, call numbers and item barcodes with one of 15 given item process status (Z30\_ITEM\_PROCESS\_STATUS). You must limit the report to a specific library, item process status and call number range
  - o Used for database maintenance, ex: being searched, claimed return, out at bindery
  - o Produced when needed



### Overdue Items by Due Date Report (Reserves and Other Library Collections)

- **Creates a list of patrons with overdue books; includes ID numbers, patron names, titles, loan dates and due dates for items in a selected library and collection.**
- **Used to monitor short-term loans and returns**
- **Produced several times a day**
- Returned Long Overdue and Claimed Returned Items Report (All Libraries)
  - o Creates a list of users with *Long Overdue* or *Claimed Returned* books; includes user ID, name, titles, original due dates and return dates for items.
  - o Used for crediting or billing fines and replacement costs
  - o Produced daily

## **Faculty Circulation Reports**

- Long Overdue Items/Patron Names Report (Selected Library -- Faculty Loans Only)

- o This report creates a list of titles, call numbers, due dates and barcodes listed by faculty name. All of the items listed on the report have a loan status (Z36\_STATUS) of Long Overdue or Claimed Returned.
- o Used to monitor faculty renewals once due date has passed
- o Produced when needed

## Circulation Statistics

- [General Circulation Transaction Statistics](#) (All Libraries)
- [Count of Initial Loans by Library](#) (All Libraries)
- [Count of Initial Loans and Renewals](#) (All Libraries)
- [Reserve \(2 Hour Loan\) Circulation Transaction Statistics](#) (All Libraries)
- [Reserve \(2 Hour Loan\) Count of Initial Loans and Renewals](#) (All Libraries)



### [Count of Loans/Renewals by Patron Status and Type](#) (All Libraries)

- [Count of Online Recall and Hold Requests by Library](#) (All Libraries)
- [Count of Online Delivery Requests by Library](#) (All Remote Libraries)

## Course Reserve Reports



### [Find Courses to which a Given Item is Attached](#)

- **Used when removing items from reserve; check to see if attached to other courses; could do title search but this is easier**
- **Produced as needed**
- [Titles on Reserve by Course Number](#)
  - o Produces a list of titles on reserve for a specific course
  - o Used when adding or removing materials from reserve to retrieve materials from reserve shelves or check against requests
  - o Produced as needed
- [Titles on Reserve by Sublibrary, Collection and Item Status](#)
  - o Used to identify reserve books with certain item status for database cleanup or changes.
  - o Produced as needed.