



Reports Retention for Library Staffs

Report name	type	frequency	deletion schedule
Daily transactions	circulation	daily	after 1 day
Onshelf Hold Items	holds	daily (2x/day weekdays)	after 1 day
Assumed lost - report	circulation	weekly	after 1 week
Assumed lost - bill	circulation	weekly	after 1 week
Overdues	circulation	weekly	after 1 week
30 Day Transits TO	transits	weekly	after 1 week
30 Day Transits FROM	transits	weekly	after 1 week
Holds [x-y] days	holds	weekly	after 1 week
Claims returned	circulation	monthly	after 1 month
Location NEW older than 100 days	inventory	monthly, 10th day	after 1 month

To save a copy of any report, simply open the report and choose File--Save as...

Good practice: Create a folder in My Documents called Symphony reports, and as you save reports to that folder, give them logical names that include a date, for example--2011maydailytrans

revised 2011/01/03 chs