

Maine Balsam Library Consortium

Reports Guidelines

This guide establishes standards for the creation, organization, naming, and maintenance of reports in Balsam. Consistent report management ensures that staff across the consortium can locate reports easily, understand their purpose, and trust that available reports are current and functional.

General

Reports are organized using the default Koha report categories:

- **Accounts**
- **Acquisitions**
- **Catalog**
- **Circulation**
- **Patrons**
- **Serials**

Three categories are added to the defaults:

1. **Annual:** for reports run at the top of the year, such as the State Report
2. **Custom:** for reports created for a single library branch
3. **Balsam ILL:** for reports related to interlibrary loan activity

All reports should be assigned to an appropriate category. Reports should not be left uncategorized.

Consortium Reports

Reports intended for use by the entire consortium should have:

- An assigned category
- A clear, descriptive name that indicates the report's purpose
- Adequate notes describing what the report does, what data it draws on, and any parameters or limitations users should be aware of

New consortium reports will be reviewed and approved by the designated review committee before being moved out of the Custom category. Until approved, new reports should remain in the Custom category.

Custom Reports

- Custom reports should be saved under the Custom category.
- Custom reports should follow the naming convention libraryCode_category_description (e.g., THO_CIRCULATION_Today or HANSEN_SERIALS_MissingMagazines).
- Custom reports will be reviewed annually. Reports that have not been used in the past 12 months will be flagged for removal. Authors of flagged reports will be given an opportunity to respond before the report is deleted.

- Existing custom reports will be moved into the Custom category and renamed to follow the naming convention as needed. Authors will be notified when their reports are moved.

Review/Reshuffle

Reports that do not conform to this policy may be recategorized, renamed, or removed by system administrators. Questions about this policy or requests for exceptions should be directed to the reports committee.