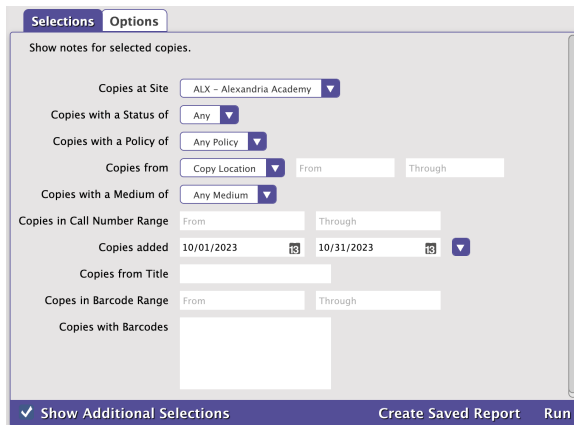


# Remind me with reports... for notes!

October 9, 2023



The screenshot shows a web interface for generating reports. It has two tabs: 'Selections' and 'Options'. The 'Selections' tab is active and contains the following filters:

- Copies at Site: ALX - Alexandria Academy
- Copies with a Status of: Any
- Copies with a Policy of: Any Policy
- Copies from: Copy Location (dropdown), From (text), Through (text)
- Copies with a Medium of: Any Medium
- Copies in Call Number Range: From (text), Through (text)
- Copies added: 10/01/2023 (calendar icon), 10/31/2023 (calendar icon), and a dropdown arrow
- Copies from Title: (text)
- Copies in Barcode Range: From (text), Through (text)
- Copies with Barcodes: (text)

At the bottom of the 'Selections' tab, there are three buttons: 'Show Additional Selections' (with a checkmark icon), 'Create Saved Report', and 'Run'.

Emily is checking out a book on the Salem witch trials when Miss Sanderson notices the label is peeling off the spine. Rather than holding Emily up by addressing the problem right then, she adds a copy note that will come up once the book is checked back in.

But how can she keep track of all the copy notes and patron notes?

The [Copy Notes Report](#) and [Patron Notes Report](#) can help Miss Sanderson (and you!) keep your records up to date.

To run the Copy Notes Report –

1. Go to Operations > Reports > Copies > Information > Copy Notes
2. Use the **Selections** tab to select the copies you want to show on the report (leaving the default selections will show all copies with the selected notes)
3. On the **Options** tab, select the type of notes and how to sort the report
4. Click **Run**

To run the Patron Notes Report –

1. Go to Operations > Reports > Patrons > Information > Patron Notes
2. Use the **Selections** tab to select who you want to show on the report (leaving the default selections will show all patrons with the selected notes)
3. On the **Options** tab, select the type of notes and how to sort the report
4. Click **Run**

How do you utilize Copy notes and Patron notes? Let us know in the comments!

Want some help navigating notes, reports, or anything else in Alexandria? Contact our amazing support team at (800) 347-4942 · [support@companioncorp.com](mailto:support@companioncorp.com).



Coming soon: Reports will be split up into 3 types—informational [Reports](#), email [Notices](#), and [Labels](#)! And they will all be joining the new makeover interface with a fresh look and improved functionality.

We'll be sharing betas with our users in upcoming months.