Circulation Information Reports

Operations

Reports
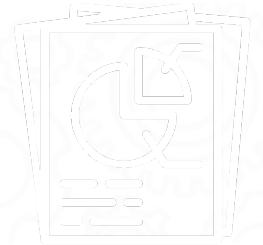
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Unknown macro: 'rate'

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Tools > Reports > Circulation > Information

- Loaned Items Information
- Overdue Items or Unpaid Charges Information

- Overdue Items Information
- Patron Items Out Count (TT only)

- Temporary Items Information

⚠️ Circulation Groups have been temporarily restored but will be moving to Textbook Tracker only soon.

Loaned Items Information

Loaned Items Information

Textbook Tracker: *Loaned Textbooks Information*

Generates a list of loaned items (including temporary items) along with their due dates

Use(s)

- Librarians and teachers can run this report to get a list of students in a particular group or class who have loaned items out. They can then remind their students to return their items when they're due. Consider creating Saved Reports that automatically send emails to staff with this information periodically.

✓ Run a *Coming Due Items Notice* report to get notice slips for individual patrons and parents that let them know library items are due soon.

Circulation Information Reports

Selections

Selections | **Options**

See loaned items (including temporary items) for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons with Items Borrowed	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Items Due	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with a Policy of	Any Policy ▼
Copies with a Policy of	Any Policy ▼
Patrons from	Homeroom ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Circulation Group Code	
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	
Title	

✔ **Show Additional Selections**   **Create Saved Report**   **Run**

⚠ This report now includes a **Title** selection.

Options

Selections | **Options**

Sort by	Last Name ▼
Format	Brief ▼
	☐ Landscape
	⦿ Copy Barcode
	○ Serial Number

Example Reports

Loaned Items Information (Brief).pdf

Brief format

Loaned Items Info...f Count Only).pdf

Brief Counts Only format

Loaned Items Info...

Brief with Serial N

Loaned Items Infor...ion (Detailed).pdf	Loaned Items Info...ef Landscape).pdf	Loaned Items Info...(
Detailed format	*Brief Landscape* format	*Detailed with Serial*

Overdue Items and Unpaid Charges Information

Overdue Items or Unpaid Charges Information

Generates a list of both overdue items and unpaid charges along with due dates and charge amounts

Charges include the end result of overdue fines, lost or damaged fees, and manually-charged amounts. Overdue fines continuously accumulate until items are returned. Once the item is returned, the fine becomes a charge.

Use(s)

Librarians and teachers can run this report to get a list of students in a particular group or class who have overdue items and unpaid charges. They can then remind their students to return their items and pay their charges. Consider creating Saved Reports that automatically send emails to staff with this information periodically.

> ⊘ Run an *Overdue Items and Unpaid Charges Notice* report to get notice slips for individual patrons and parents.

Selections

Selections | Options

See overdue items and/or unpaid charges for:

Patrons with items	1	9999	Days Overdue
Patrons with a Status of	Active ▾		
Patrons with Items Due	From MM/DD/YYYY 📅	Through MM/DD/YYYY 📅	▾
Fine or Charge Balance	.01	99999.00	
Transaction Date	From MM/DD/YYYY 📅	Through MM/DD/YYYY 📅	▾
Patrons with a Policy of	Any Policy ▾		
Patrons from	Homeroom ▾	From 🔍	Through 🔍
Patrons in Grade	From	Through	
Patrons with Last Name			
Patrons in Barcode Range	From	Through	
Patrons with Barcodes			
Circulation Group Code			

✔ Show Additional Selections   Create Saved Report   Run

Options

Selections | Options

Sort by   Last Name ▾

Format   Standard ▾

- ● Call Number
- ○ Serial Number
- ○ Barcode

Example Reports

📎

Overdue Items or U...Report (Brief).pdf

Brief

📎

Overdue Items or U...ort (Standard).pdf

Standard

📎

Overdue Items or U...

Detaile

Overdue Items Information

Overdue Items Information

Textbook Tracker: *Textbook Overdue Items Information*

Generates a list of items that are overdue

Use(s)

- Librarians and teachers can run this report to get a list of students in a particular group or class who have overdue items. They can then remind their students to return their items and pay their overdue fines. Consider creating Saved Reports that automatically send emails to staff with this information periodically.

- Run this report if you need to check the shelves to see if "overdue" items have been returned already. Use the *Standard* format and sort by Copy Call Number.

- Libraries that use Self-Service can run this report to make sure items were checked in properly. Use the *Standard* format and sort by Copy Call Number.

- Use the *Posting* format to print an overdue list that can be posted in a classroom or library. (You can choose whether to show patron names or barcodes.)

✅ Run an Overdue Items Notice report to get notice slips for individual patrons and parents.

Selections

| Selections | Options |

See information on overdue items for individual patrons. Include records for:

Patrons at Site	WHS – Washington High School ▼
Patrons with a Status of	Active ▼
Patrons with Items Due	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with items	1 9999 Days Overdue
Patrons with a Policy of	Any Policy ▼
Patrons from	Homeroom ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Circulation Group Code	
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	
Title	

✔ **Show Additional Selections**   **Create Saved Report**   **Run**

Options

| Selections | Options |

Sort by   Last Name ▼

Format   Standard ▼

- ⦿ Call Number
- ◯ Serial Number
- ◯ Barcode

Example Reports

Overdue Items Info...port (Posting).pdf

Posting

Overdue Items Info...Report (Brief).pdf

Brief

Overdue Items Info...

Standard

Temporary Items Information
Temporary Items Information

Generates a list of temporary items currently checked out to patrons

Selections

Selections | Options

This report will include loaned temporary items only for:

Patrons with a Status of	Active ▼
Patrons with Items Borrowed	From MM/DD/YYYY 🗓 Through MM/DD/YYYY 🗓 ▼
Patrons with Items Due	From MM/DD/YYYY 🗓 Through MM/DD/YYYY 🗓 ▼
Patrons with a Policy of	Any Policy ▼
Copies with a Policy of	Any Policy ▼
Patrons in	Homeroom ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Circulation Group Code	
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ Show Additional Selections   Create Saved Report   Run

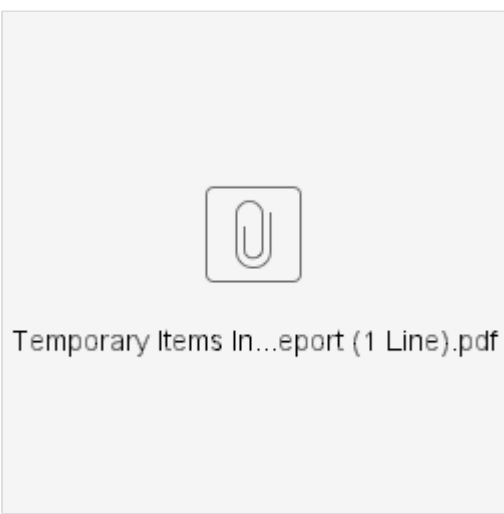⚠ This report now includes a **Title** selection.

Options

Selections | Options

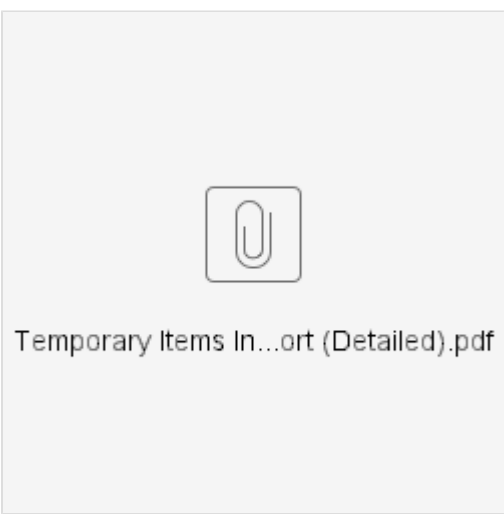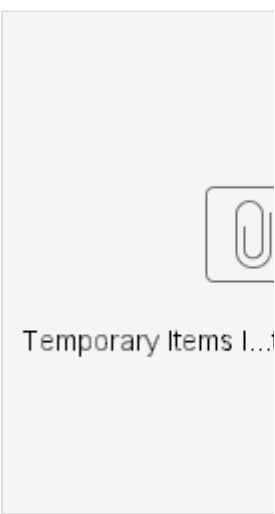|	
Sort by	Last Name ▼
Format	1 Line ▼
	☐ Landscape

Example Reports

Temporary Items In...eport (1 Line).pdf

1 Line format

Temporary Items In...ort (Detailed).pdf

Detailed format

Temporary Items I...

1 Line Landsca