


# Circulation Notices Reports

## Operations

### Reports

How helpful was this page?

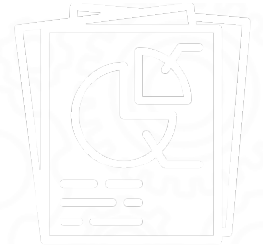
Unknown macro: 'rate'

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- [Coming Due Items Notice](#)
- [Damaged Items Notice](#)
- [In-Stock Hold Notice](#)
- [Loaned Items Notice](#)
- [Needed for Reservation Notice](#)
- [Overdue Items or Unpaid Charges Notice](#)
- [Overdue Items Notice](#)
- [Unpaid Charges Notice](#)



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



[Learn more about setting up email notices for patrons and librarians.](#)

## Coming Due Items Notice

### Coming Due Items Notice

Generates notices for patrons letting them know that their items are due soon. Specify the due date range using the *Patrons with Items Due* selection.

#### Use(s)

Librarians and teachers can run this report to get notices for students in a particular group or class who have items due soon. Consider creating some [Saved Reports](#) that automatically send out this report:

- Set up some Saved Reports that periodically email these notices to staff for them to distribute in person or through mail. There are notice formats for students or parents.
- Set up a Saved Report that emails students and/or parents directly when they have items due soon.

# Circulation Notices Reports

Selections

Options

Generate notices to inform patrons of items due in the near future. Include loaned items and temporary items for:

Patrons at Site MIA - Mia Middle School

Patrons with a Status of Active

Patrons with Items Due Next 7 Days

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

✓ Show Additional Selections

Create Saved Report

Run

Selections

Options

Sort by Last Name

Format 2 Per Page

☒ Show Rep

☐ Include Co

☐ Show Patron's Phone Number

☐ Show Patron's Barcode

Notice Text

The following items require your attention. Please contact the library as soon as p


Patrons with Items Due: Enter a relative date or date range.

⚠

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


## Example Reports

These examples use the default options for each format.




Coming Due Items...e 2 per page.pdf

2 Per Page format




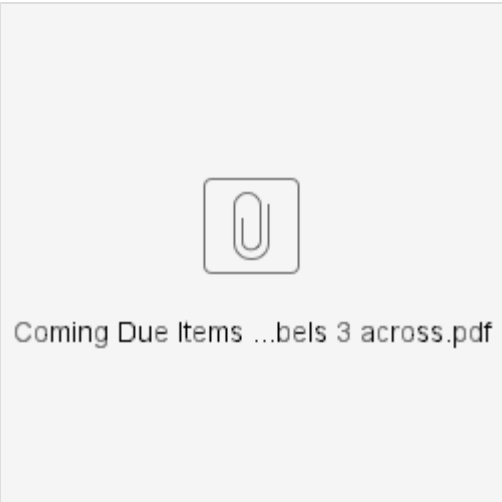
Coming Due Items...e 4 per page.pdf

4 Per Page format



Coming Due Items N

Letters fo

<p>Notice from your Library for Brooke Bell.</p> <p> Stephen Kurzer 6/5/2020 4:55 PM To: [REDACTED]</p> <hr/> <p>Brooke Bell</p> <p>The following items require your attention. Please return the library as soon as possible.</p> <p>Title: Elbow Creek Barcode: 014901 Date Due: Jun 13, 2020 Date Returned: Not Returned Fine: \$0.00</p> <p>Title: The Mysterious Benedict Society Barcode: 014901 Date Due: Jun 13, 2020 Date Returned: Not Returned Fine: \$0.00</p> <p>Academy Middle School 11011 East Lincoln Blvd Salt Lake City, UT 84121</p> <p>Administrator: Stephen Kurzer</p> <p><i>Email format (example of an email sent to a patron)</i></p>	<div data-bbox="695 142 1198 646">  <p>Coming Due Items ...bels 3 across.pdf</p> </div> <p><i>Mailing Labels 3 Across format</i></p>	
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## Damaged Items Notice

### Damaged Items Notice

Generates parent notice slips and/or mailing labels for patrons with damaged item fees

All patrons who have an unpaid damage charge from discarded or damage coded (DL) items will be included in this report.

#### Use(s)

Librarians and teachers can run this report to get notices for students in a particular group or class who have unpaid damaged item fees. These notices can be mailed or handed out in person to students or parents. Consider creating [Saved Reports](#) that automatically email these notices to staff periodically for them to distribute.

## Selections

### Selections Options

Include records for:

Patrons with a Status of

Discard Reason

Patrons with a Policy of

Patrons from  From  Through

Patrons in Grade From  Through

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

Format

Letter Text

The following items have been damaged and appropriate fines charged.

## Example Reports



Damaged Items Notice (letter).pdf

Letter format



Damaged Items Noti...ailing labels).pdf

Mailing Labels 3 Across format

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## In-Stock Hold Notice

### In-Stock Hold Notice

Generates notices for patrons letting them know that an in-stock hold is ready for them to pick up

In-stock holds are generally holds that have been checked in by the previous patron and are being held separate from the general collection for the next patron.

Use(s)

Librarians and teachers can run this report to get notices for students in a particular group or class who have in-stock holds. Consider creating some [saved reports](#) that automatically send out this report:

- Set up some saved reports that periodically email these notices to staff for them to distribute in person or through mail. There are notice formats for students or parents.
- Set up a saved report that emails students or parents directly when in-stock holds are ready.
- Set up a saved report that automatically notifies patrons as their in-stock holds become available. Do this by using a relative date with the **In-Stock Hold Available** selection (this day, last day, etc).

Selections

SelectionsOptions

Include records for:

Patrons at Site

AMS - Adams Middle School

Patrons with a Status of

Active

In-Stock Hold Expiration Date

From MM/DD/YYYY

Through MM/DD/YYYY

In-Stock Hold Available

From MM/DD/YYYY

Through MM/DD/YYYY

Patrons with a Policy of

Any Policy

Patrons from

Location

From

Through

Patrons in Grade

From

Through

Patrons with Last Name

Patrons in Barcode Range

From

Through

Patrons with Barcodes

Title

✓ Show Additional Selections

Create Saved Report

Run

Options

SelectionsOptions

Sort by

Last Name

Format

Standard

Notice Text

An In-Stock item is being held for you. Please pick it up by the specified date or it will be removed from circulation.




In-Stock Hold Expiration Date:


Send out notices about in-stock holds that will be expiring soon.

In-Stock Hold Available:

Send out notices based on when holds become in-stock.

Example Reports

<div><div></div><div>In-Stock Hold Noti...ort (Standard).pdf</div></div> <div>Standard format</div>	<div><div></div><div>In-Stock Hold Noti...t (4 Per Page).pdf</div></div> <div>4 Per Page format</div>	<div><div></div><div>In-Stock I</div></div> <div></div>
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<p>Notice from your Library for Preston Barry.</p> <p> StephenKunzler [redacted] 6/17/2020 5:01 PM To: [redacted]</p> <hr/> <p>Preston Barry,</p> <p>An In-Stock item is being held for you. Please pick it up by the specified date or it will be returned to general circulation.</p> <p>Title: Chicken feathers Barcode: 20933 Hold Expires: Jun 22, 2020</p> <p>Title: Civil War Barcode: 20423 Hold Expires: Jun 22, 2020</p> <p>Title: Crispin Barcode: 20704 Hold Expires: Jun 22, 2020</p> <p>Adams Middle School 1831 Fort Union Blvd Salt Lake City, UT 84121</p> <p>Administrator: Stephen Kunzler</p>		
<i>Email format (example of an email sent to a patron)</i>		

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## Loaned Items Notice

### Loaned Items Notice



Notices (letters or emails) to inform patrons of items they currently have checked out.

#### Use(s)

For remote checkouts through Researcher

- Patrons place items on hold through Researcher.
- Librarians run the hold reports, gather the items, and check them out to the patron.
- Items get put into bags for curbside pickup.
- Librarians run the Loaned Items Notice report, selecting by date range of checkout, and notifying patrons their items are ready for pickup.

Receipt substitute

- Facility runs the report for patrons who checked out items today and delivers printed letters to each patron.

Textbook Tracker

- Because textbooks don't often have due dates (return at end of term etc), this report can provide a list of textbooks the students have checked out. The list could be compared to a course schedule, to ensure the student has all the materials they need.

## Selections

SelectionsOptions

Generate notices to inform patrons of items they currently have checked out. Include records for:

Patrons at Site

WHS - Washington High 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

Patrons with Last Name

Patrons in Barcode Range

From

Through

Patrons with Barcodes

Title

✓ Show Additional Selections

Create Saved Report

Run

## Options

SelectionsOptions

Sort by

Last Name

Show Patrons

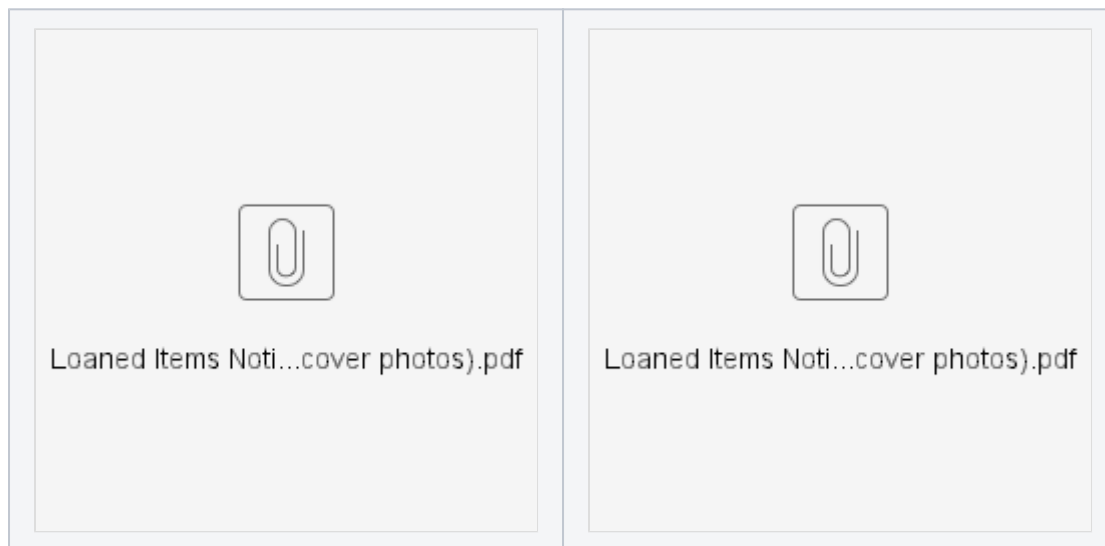
Format

Letters

Include Cover Photos

Notice Text

The following items require your attention. Please contact the library as soon as possible.



## Needed for Reservation Notice

### Needed for Reservation Notice

Generates a list of patrons with items due in the near future that are needed for reservations

Use(s)



Librarians or teachers can run this report to get a list of patrons who may need a reminder to return their items on time so they can fill reservations.

Selections

SelectionsOptions

Use this report to generate a notice for items that are coming due in the near future and are needed to fill a reservation. Include loaned items for:

Patrons at SiteAMS – Adams Middle School

Patrons with a Status ofActive

Patrons with Items DueNext7Days

Patrons with a Policy ofAny Policy

Patrons fromLocationFromThrough

Patrons in GradeFromThrough

Circulation Group Code

Patrons with Last Name

Patrons in Barcode RangeFromThrough

Patrons with Barcodes

Show Additional SelectionsCreate Saved ReportRun

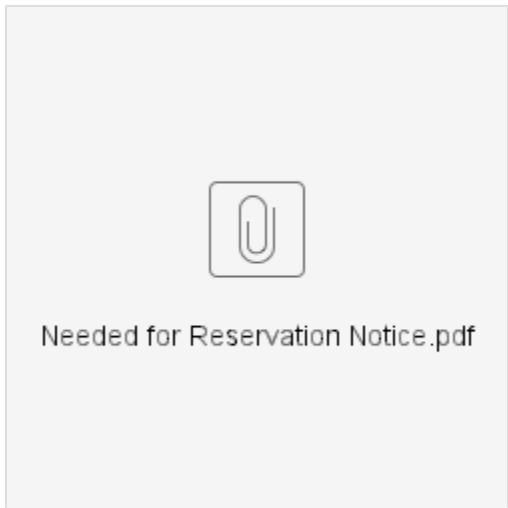
This report now includes a **Title** selection.

Options

SelectionsOptions

Sort byLast Name

### Example Report



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## Overdue Items and Unpaid Charges Notice

### Overdue Items or Unpaid Charges Notice

Generates notices for patrons with overdue items and/or unpaid [charges](#)

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 notices for students in a particular group or class who have overdue items and/or unpaid charges. Consider creating some [Saved Reports](#) that automatically send out this report:

- Set up some Saved Reports that periodically email these notices to staff for them to distribute in person or through mail. There are notice formats for students or parents.
- Set up a Saved Report that emails students or parents directly when they have overdue items and/or unpaid charges.

Selections

SelectionsOptions

Generate notices to inform patrons of overdue items, lost item charges, and/or other unpaid charges. Include records for:

Patrons with items

09999

Days Overdue

Patrons with a Status of

Active

Fine or Charge Balance

.0199999.00

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

Circulation Group Code

Patrons with Last Name

Patrons in Barcode Range

From

Through

Patrons with Barcodes

Title

Copies with a Policy of

Any Policy

Show Additional Selections

Create Saved Report

Run

Options

SelectionsOptions

Sort by

Last Name

Include Cc

Format

2 Per Page

Notice Text

The following items require your attention. Please contact the library as soon as p

Fine or Charge Balance:

Enter the fine/charge range for which you want to send out notices. Note that this selection looks at individual charges rather than a patron's total balance. This means that someone with three 50¢ charges that total \$1.50 won't receive a notice since each charge is under the \$1.00 (if you set \$1.00 as the minimum amount). Also, overdue items with fines not included in the selected amount won't be included in notices.

With the Email format, you can choose whether to send the or all emails on selected patrons' records. This allows you to parents/guardians if necessary.

Example Reports

Overdue Items or ... (2 per page).pdf


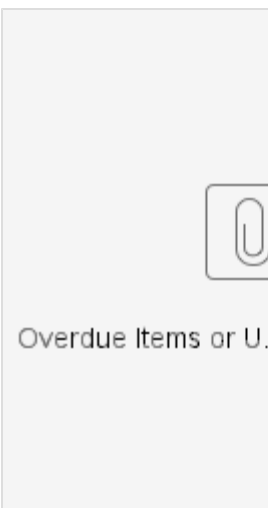
2 Per Page format

Overdue Items or ... (4 per page).pdf

4 Per Page format

Overdue Items or U.

Letters fo

	 <p><i>Email format (example of an email sent to a patron)</i></p>	 <p><i>Mailing Labels 3 /</i></p>
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## Overdue Items Notice

### Overdue Items Notice

Generates notices for patrons with items that are overdue

[Overdue fine](#) amounts, which become charges when the items are checked in, are shown as well.

Use(s)

Librarians and teachers can run this report to get notices for students in a particular group or class who have overdue items. Consider creating some [Saved Reports](#) that automatically send out this report:

- Set up some Saved Reports that periodically email these notices to staff for them to distribute in person or through mail. There are notice formats for students or parents.
- Set up a Saved Report that emails students or parents directly when they have overdue items.



Textbook Tracker

## Selections

Selections

Options

Generate notices to inform patrons of overdue items that need to be returned. Include records for:

Patrons with a Status of Active

Patrons with Items Due From MM/DD/YYYY 13 Through MM/DD/YYYY 13

Patrons with items 0 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

Copies with a Policy of Any Policy

✓ Show Additional Selections
Create Saved Report
Run

## Options

Selections

Options

Sort by Last Name ☐ Include C


Format 2 Per Page

Notice Text

The following items require your attention. Please contact the library as soon as p


With the Email format, you can choose whether to send the or *all* emails on selected patrons' records. This allows you to parents/guardians if necessary.

## Example Reports




Overdue Items Not... (2 per page).pdf

2 Per Page format



Overdue Items Not... (4 per page).pdf

4 Per Page format



Overdue Items Noti...

Letters fo

	<div data-bbox="782 136 1101 640"> <p>Meryl Chism, The following items require your attention. Please contact the library as soon as possible.</p> <div data-bbox="799 193 847 256"> </div> <p>Title: Ghost girl Barcode: 217448 Date Due: Jun 11, 2021 Date Returned: Not Returned Replacement Cost: \$20.00 Fine: \$0.50</p> <div data-bbox="799 319 847 382"> </div> <p>Title: Up before daybreak Barcode: 20020 Date Due: Jun 11, 2021 Date Returned: Not Returned Replacement Cost: \$20.00 Fine: \$0.50</p> <div data-bbox="799 445 847 508"> </div> <p>Title: Uprising Barcode: 21215 Date Due: Jun 11, 2021 Date Returned: Not Returned Replacement Cost: \$20.00 Fine: \$0.50</p> <p>Adams Middle School 1831 Fort Union Blvd Salt Lake City, UT 84121</p> <p>Administrator: Stephen Kunder</p> </div> <p>Email format (example of an email sent to a patron)</p>	<div data-bbox="1226 136 1490 640"> <p>Overdue Items Noti..</p> </div> <p>Mailing Labels 3 /</p>
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## Unpaid Charges Notice

### Unpaid Charges Notice



Generates notices for patrons with charges, fines, and/or fees that haven't been paid yet

**Charges** include the end result of overdue fines, lost or damaged fees, and manually-charged amounts. **Overdue fines** accumulate until the item is returned.

#### Use(s)

Librarians and teachers can run this report to get notices for students in a particular group or class who have unpaid charges. Consider creating some **Saved Reports** that automatically send out this report:

- Set up some Saved Reports that periodically email these notices to staff for them to distribute in person or through mail. There are notice formats for students or parents.
- Set up a Saved Report that emails students or parents directly when they have unpaid charges.

## Selections

Selections

Options

Generate notices to inform patrons of unpaid charges that need to be paid. Include records for:

Patrons with a Status of Active

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 Homerroom From Through

Patrons in Grade From Through

Circulation Group Code

Patrons with Last Name

Patrons in Barcode Range From Through

Patrons with Barcodes

Title

Copies with a Policy of Any Policy

✓ Show Additional Selections

Create Saved Report

Run

## Options

Selections

Options

Sort by Last Name Include C

Format 2 Per Page

Include ☒ All Charges, Fees, and Fines  
☐ Overdue Fines Only  
☐ Lost Fees Only  
☐ Other Charges/Fees

Notice Text

The following items require your attention. Please contact the library as soon as p

With the Email format, you can choose whether to send the or *all* emails on selected patrons' records. This allows you to parents/guardians if necessary.



Other Charges/ Fees includes lost and overdue charges, damage/discarded fees.

## Example Reports

Unpaid Charges No... (2 per page).pdf

2 Per Page format

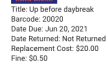
Unpaid Charges No... (4 per page).pdf

4 Per Page format

Unpaid Charges No...

Letters fo

The following items require your attention. Please contact the library as soon as possible.



Administrator: Stephen Kunzler

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