

# Patrons Account Reports

## Operations

### Reports

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- [Account Expiring Notice](#)
- [Account Introduction](#)
- [Patron Details Summary](#)
- [Patrons Missing Information](#)
- [Suspended Patrons](#)

## Account Introduction

### Account Introduction



Generates informational slips for patrons with their login credentials, library use instructions, account restrictions, library policies, contact information, and other information the librarian wants to give patrons

#### Use(s)

Print these slips at the beginning of the school year for each patron to give them all the information they need to start using the library.

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

#### Selections

##### Selections Options

Generate paper or email notices for patrons that contain information on accessing their accounts. Include records for:

|                           |                                    |
|---------------------------|------------------------------------|
| Patrons at Site           | AMS - Adams Middle School          |
| Patrons with a Status of  | Active                             |
| Patrons in Security Group | Any Group                          |
| Patrons with a Policy of  | Any Policy                         |
| Patrons from              | Location From Through              |
| Patrons in Grade          | From Through                       |
| Patrons added             | From MM/DD/YYYY Through MM/DD/YYYY |
| Patrons with Last Name    |                                    |
| Patrons in Barcode Range  | From Through                       |
| Patrons with Barcodes     |                                    |

☒ Show Additional Selections

Create Saved Report Run

#### Options




##### Selections Options

|         |            |
|---------|------------|
| Sort by | Last Name  |
| Format  | 2 Per Page |

##### Letter Text

Here is your barcode ID and Username for accessing the library catalog. This info your patron status details which includes a list of items you have checked out and reservations you have placed and their expiration dates, and any charges you owe information to place holds or reservations if you are allowed to do so. You may use the Alexandria Researcher application or using the Alexandria Web Catalog

#### Example Reports

|  |  |  |
|--|--|--|
| <div>  <p>Account Introduction...t (4 per page).pdf</p> </div> <div>4 Per Page format</div> | <div>  <p>Account Introduction...eport (Letter).pdf</p> </div> <div>Letter format</div> | <div>  <p>Account Introduction..</p> </div> <div>Email format (PDF lists all p: email</div> |
|--|--|--|

Email format (example of an email sent to a patron)



The account expiration date will only show if you have account expiration dates enabled in your [Patron Preferences](#).

[Back to Top](#)

## Account Status Summary

### Patron Details Summary



Generates Patron Details for each selected patron (a full breakdown of accounts)



Before [20.12](#), this report was *Account Status Summary*.

[Patron Details](#) includes an account balance, payments, charges, credits, loaned items, lost items, overdues, holds, reservations, and reserved items.

#### Use(s)

Print this report for patrons and/or their parents regularly so they can remember which items they have, what's overdue and needs to be returned, which items are lost, how much they owe the library, etc. Use the [Send Patron Details Email report](#) if you want to email the report to patrons instead.

## Selections

Selections

Options

See summaries of each patron's account with their balance, loaned items, overdue items, holds, and more. Include records for:

Patrons at Site

AMS – Adams Middle School

Patrons with a Status of

Active

Patrons in Security Group

Any Group

Patrons with a Policy of

Any Policy

Patrons from

Location

From

Through

Patrons in Grade

From

Through

Patrons added

From MM/DD/YYYY

Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range

From

Through

Patrons with Barcodes

Show Additional Selections

Create Saved Report

Run

## Options

Selections

Options

Sort by

Last Name

▼

☒ Limit to patrons that have transactions

**Limit to patrons that have transactions:** When checked, those whom have items checked out, on hold, reserved, or all patrons, whether they have transactions or not, remove t

## Example Report



Patron Details Summary Report.pdf

[Back to Top](#)

**Card Expiring Notice**  
**Account Expiring Notice**

Emails patrons whose accounts are expiring in the next 30 days



This report will only work if you have enabled account expiration dates (**Preferences > Patrons > Patron Rules > uncheck [Disable account expiration dates](#)**) and configured your [Email Preferences](#).



## Textbook Tracker



Patrons need a valid email address on their record to receive email notifications. Not sure who's missing an email? Run the [Patrons with No Email report](#) to get a list.

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

Use(s)

Create a [saved report](#) that's scheduled to automatically run once a month so that patrons are always notified of their cards expiring.

Selections

SelectionsOptions

This email sends to all patrons with accounts expiring in the next 30 days. Once a patron's account has expired, they will not receive this notice. Include records for:

Patrons at Site

Patrons with a Status of

Patrons in Security Group

Patrons with a Policy of

Patrons from  From  Through

Patrons in Grade From  Through

Patrons added From MM/DD/YYYY  Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range From  Through

Patrons with Barcodes

☒ Show Additional Selections

Options

SelectionsOptions

Notice Text

This is an automatic notice. Your %sitename% account expires on %expiration dat

## Example Email

This is what the email looks like to patrons:

Cassandra Guillaume,

This is an automatic notice. Your Washington High School account expires on Dec 15, 2020.

Barcode: 1170

Username: cguillaume

Account Expires: Dec 15, 2020

[Back to Top](#)

## Patrons Missing Information

### Patrons Missing Information

Generates a list of patrons without an email or picture on their record

Use(s)

- Run this report after [importing patron records](#) to see which patrons need to have a primary email address manually added.
- Run this report after [importing patron pictures](#) to see if any patrons were missed.
- If you use any email notice reports, run this report to get a list of who's missing a primary email address. Then you can contact those patrons and add an email. Otherwise, they won't receive notices.

Selections

SelectionsOptions

View a list of patrons who don't have specific information in their record, such as email or a picture. Include records for:

Patrons at Site

AMS – Adams Middle School

Patrons with a Status of

Active

Patrons in Security Group

Any Group

Patrons with a Policy of

Any Policy

Patrons from

Homeroom

From

Through

Patrons in Grade

From

Through

Patrons added

From MM/DD/YYYY

Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range

From

Through

Patrons with Barcodes

Show Additional Selections

Create Saved Report

Run

Options

SelectionsOptions

Patrons missing

Email

Sort by

Last Name

## Example Reports

Patrons Missing In...Missing Email).pdf

Patrons missing *Email*

Patrons Missing In...ssing Picture).pdf

Patrons missing *Picture*

[Back to Top](#)

## Suspended Patrons

### Suspended Patrons

Generates a list of patrons with a status of *Suspended* or letters for notifying patrons and parents of the suspension

#### Use(s)

If you can't charge fines but still want to encourage patrons to return items on time, [suspending them](#) and sending out these letters may act as an incentive.

 Textbook Tracker

## Selections

### Selections Options

View a list of suspended patrons or generate letters notifying patrons of their suspension. Include records for:

Patrons at Site

Patrons in Security Group

Patrons with a Policy of

Patrons from  From  Through

Patrons in Grade From  Through

Patrons added From MM/DD/YYYY  Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range From  Through

Patrons with Barcodes

☒ Show Additional Selections

Create Saved Report Run

## Options

### Selections Options

Sort by

Format

## Example Reports



Suspended Patrons...eport (brief).pdf

*Brief format*



Suspended Patrons...ort (letters).pdf

*Letter format*

[Back to Top](#)