Patrons Account Reports

Operations

Reports

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Tools > Reports > Patrons > Account

- Account Expiring NoticeAccount Introduction

- Patron Details SummaryPatrons 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

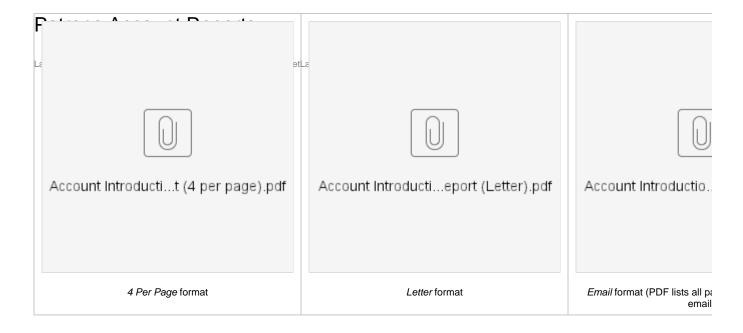
Use(s)

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				Options		
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					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 am reservations you have placed and their expiration dates, and any charges you ow	
Patrons with a Policy of Patrons from Patrons in Grade Patrons added Patrons with Last Name	Any Policy Location From From From MM/DD/YYYY	Through Through MM/DD/YYYY	Q.		information to place holds or reservations if you are allowed to do so. You may using the Alexandria Researcher application or using the Alexandria Web Catalo	
Patrons in Barcode Range Patrons with Barcodes	From	Through				
✓ Show Additional Selections Create Saved			Saved Report	Run		(

Example Reports



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.

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Account Status Summary Patron Details Summary



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

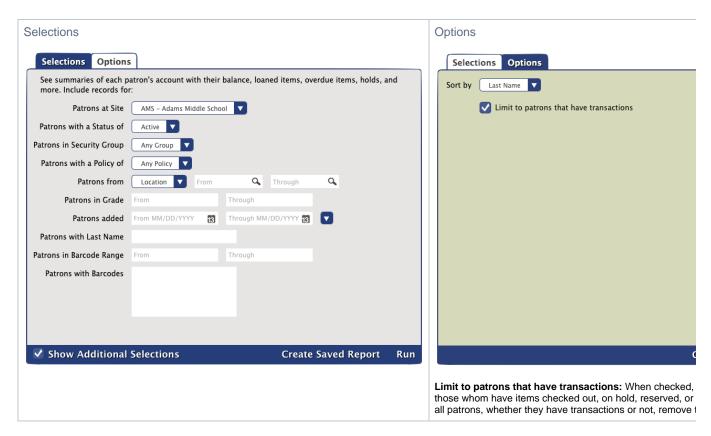


Before 20.12, this report was Account Status Summary.

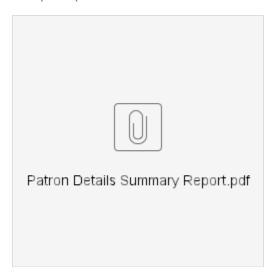
Patron Details includes an account balance, payments, charges, credits, loaned items, lost items, overdues, holds, reservations, and reserved items.

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.



Example Report



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Card Expiring Notice Account Expiring Notice

Textbook Tracker

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.

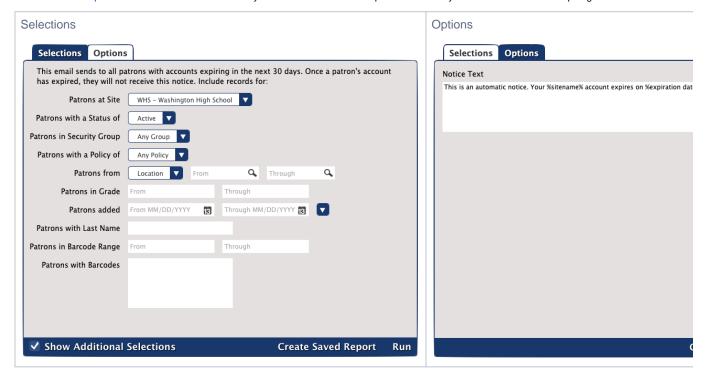


Patrons need a valid email address on their record to receive email notifications. Not sure who's missing an email? Run the *Patrons with No Email* report to get a list.

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.



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

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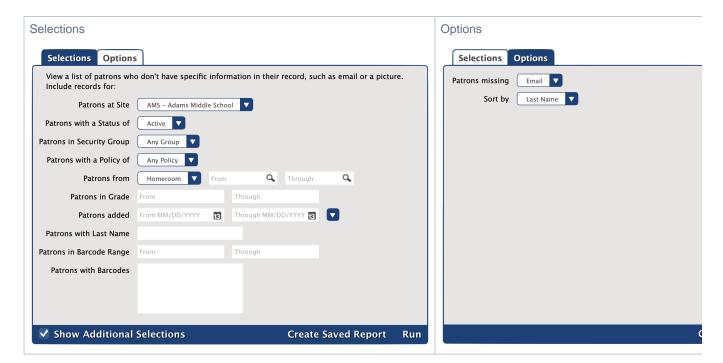
Patrons Missing Information Patrons Missing Information



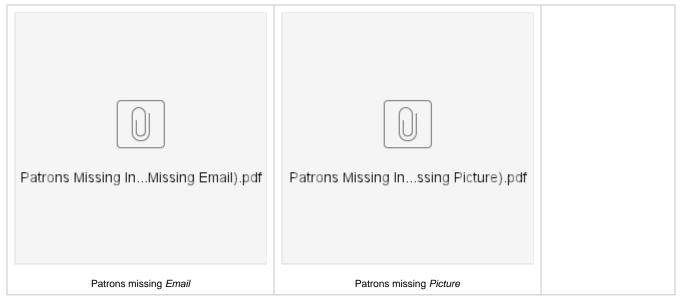
Generates a list of patrons without an email or picture on their record

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.



Example Reports



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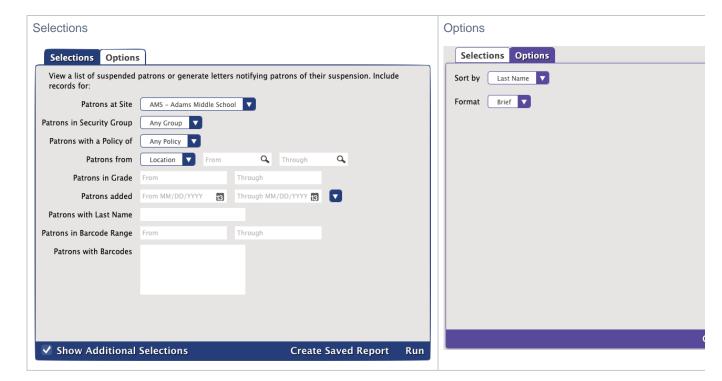
Suspended Patrons Suspended Patrons

Textbook Tracker

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.



Example Reports



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