Legacy Reports

Operations

Reports

Are you still using Legacy reports? It's easy to check. In **Reports**, choose **Legacy**, then click on the **Saved** tab at the top of the screen. If you have any saved reports using those templates, it's time to find a new report; these ones will be removed in the future. See each report's documentation for our recommendations on replacements!

- Legacy Label Reports
- Archived Copies
- Charges and Overdue Fines - Charges Only
- Charges and Overdue Fines - Complete
- Charges and Overdue Fines - Fines Only
- Copy Status (Legacy)
- Expired Patrons
- Inactive Patrons
- In-Transit from Current Site, Late in Arriving

- In-Transit to Current Site, Late in Arriving
- Library Use Copies
- Lost Items Charge Notice
- On Order Copies
- On Repair Copies
- Overdue Items Information
- Overdue Items Posting List
- Patron Credit Details
- Patron Overdue List
- Patrons with No Email
- Patrons with No Picture

- Routes Information
- Routes Patron List
- Routing Slips
- Severely Overdue Items Notice
- Title Information by Award
- Title Information by Language
- Title Information by Publisher
- Unknown Copies
- Titles with No Cover Art

Legacy Label Reports

Legacy Label Reports

If you have any saved reports using these templates, it's time to recreate them in a newer format; the old ones are now obsolete. Our new custom label reports for both patrons and copies offer advanced, field-level customization so you can design labels that fits your specific needs.

> ⚠ As of 7.18.8, most Legacy label reports have been removed. Restored reports are not supported.

Patrons Reports

Legacy Report	Updated Report
Library Cards (**Removed**)	*Library Cards (2x5)*
Patron Barcode Labels (**Removed**)	*Patron Barcode Labels (3x10)*
Patron Mailing Labels (**Removed**)	*Patron Mailing Labels (3x10)*

> ✓ New! The *Patron Labels (4x20)* report allows you to create smaller labels.

Copies Reports

Legacy Reports

Legacy Report	Updated Report	Notes
Copy Barcode Labels Last Updated: $action.dateFormatter.formatDateTime($content.getLastModificationDate()) (**Removed**)	*Copy Labels (3x10)*	
Envelope and Spine Labels (**Restored**)	*Copy Labels (3x10)* *Copy Labels (4x20)* *Copy Labels (8x6, Tall)*	As of 7.19.5, the *Envelope and Spine Labels* report has been restored. Note that Legacy reports are not supported. • For envelope labels, you can also use the *Copy Labels (3x10)* or *Copy Labels (4x20)* report. • For spine labels, you can also use the *Copy Labels (8x6, Tall)* report.
Horizontal Spine Labels (**Removed**)	*Copy Labels (5x10)*	
LOC Style Spine Labels (**Removed**)	*Copy Labels (8x6, Tall)* *Copy Labels (3x10)*	• If you used the 6x8 format, replace with *Copy Labels (8x6, Tall)*. • If you used the 3x10 format, replace with *Copy Labels (3x10)*.
Spine Labels (**Removed**)	*Copy Labels (8x6, Tall)* *Copy Labels (8x6, Wide)*	• If you printed these in Portrait, use the *Copy Labels (8x6, Tall)*. • If you printed these in Landscape, use the *Copy Labels (8x6, Wide)*.
Study Program Labels (**Removed**)	*Copy Labels (4x20)* *Copy Labels (8x6, Tall)*	Choose the right label for your program: • Accelerated Reader: *8x6* (V0032) • Lexile: *4x20* (V0036) • Reading Counts: *4x20* (V0036) • Reading Level: *4x20* (V0036) • Interest Level: *4x20* (V0036)

Label Customization

Custom label reports contain loose representation of an actual label in height and width; these are not meant to be an exact—just enough to get a rough feel for how they are laid out. Each field in the template can be customized using the options on the right. Formatting options can vary based on the type of data you've chosen to display in that field. For example, a barcode image cannot be bold.

When you're finished customizing your labels, click **Create Saved Report** so it's ready the next time you need it. Remember to give it a descriptive title so you know exactly what the labels are formatted for.

> ✅ The default font size is small, fitting on one row. However, the font used in some legacy reports may match the Large option on new label reports, which takes up two fields. Try it out and use what works best for you.

Example

In Legacy reports, you could choose a format that would automatically customize your labels. In new label reports, you get to do the customizing. Here's an example of how the new labels can be formatted to match the old Legacy formats using the same information.

Legacy Format	Information	Copy Barcode Labels (Legacy)	Copy Labels (3x10)
Standard	Call Number Barcode Image Barcode Number Title	⚠ Broken image	⚠ Broken image
Standard with Author	Call Number Barcode Image Barcode Number Author	⚠ Broken image	⚠ Broken image
2 Line Custom Text	Call Number Custom Text Custom Text Barcode Image (small) Barcode Number Title		⚠ Broken image

Smart Labels	Call Number Title Barcode Image Barcode Number Author		⚠ Broken image

Archived Copies

Archived Copies

Generates a list of copies currently assigned to the Archived Items System Patron (barcode 6)

Recommended Replacement: *Special Status Copies* report selecting by a status of Archived (6)

These items are unavailable to patrons. You may want to archive copies that are kept in a special room and not generally available for circulation.

Selections	Options

Example Report

Archived Copies Report.pdf

Back to Top

Charges and Overdue Fines - Charges Only

Charges and Overdue Fines - Charges Only

Generates a list of unpaid charges

Recommended Replacement: *Charges and Overdue Fines* report with the Other Charges/Fees option

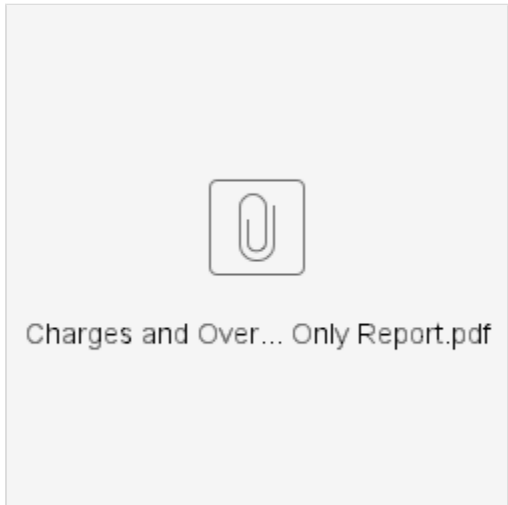Charges include the end result of overdue fines, lost or damaged fees, and manually-charged amounts.

Use(s)

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

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

⚠️

Example Report

[Charges and Over... Only Report.pdf]

Charges and Overdue Fines - Complete

⚠️ The Textbook Tracker version of this report is staying! It can be found under the Charges / Payments category.

Charges and Overdue Fines - Complete

Textbook Tracker: *Textbook Charges and Overdue Fines - Complete*

Generates a list of unpaid charges and overdue fines

Recommended Replacement: *Charges and Overdue Fines* report with the All Charges, Fees, and Fines option

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 unpaid charges and overdue fines. They can then remind their students to pay those charges and fines. Consider creating Saved Reports that automatically send emails to staff with this information periodically.

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

Example Report

Charges and Over...plete Report.pdf

Charges and Overdue Fines - Fines Only

Charges and Overdue Fines - Fines Only

Generates a list of unpaid overdue fines

Recommended Replacement: *Charges and Overdue Fines* report with the Overdue Fines Only option

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 fines. They can then remind their students to pay those fines. Consider creating Saved Reports that automatically send emails to staff with this information periodically.

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

Example Report

Charges and Over... Only Report.pdf

Copy Status (Legacy)

Copy Status (Legacy)

Generates a list of copies and their current status (Available, Checked Out, Lost, Discarded, In Processing, Library Use, On Order, On Repair, Archived, or Unknown)

Use(s)

Run this report to review the status of copies under a certain title in preparation for a class that needs them.

Selections	Options

Selections | **Options**

Include records for:

Copies with a Status of   Any ▼

Copies with a Policy of   Any Policy ▼

Copies from: Copy Location ▼   From   Through

Copies with a Medium of   Any Medium ▼

Copies in Call Number Range   From   Through

Copies added   From MM/DD/YYYY 📅   Through MM/DD/YYYY 📅 ▼

Copies from Title

Copies in Barcode Range   From   Through

Copies with Barcodes

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

Example Report

Copy Status (Legacy).pdf

Expired Patrons

Expired Patrons

Generates a list of patrons with expired accounts

Recommended Replacement: *Patron Information* report selecting by a status of Inactive

Account expiration dates can be viewed or edited on the **Personal** tab of **Patrons Management**. Set the number of days patrons' accounts are active using patron policies. When a patron's account expires, their status will be changed to Inactive during Alexandria maintenance.

> ⚠ This report will only generate results if you have enabled account expiration dates (**Preferences > Patrons > Patron Rules >** uncheck **Disable account expiration dates**).

Use(s)

Run this report regularly to see which patrons need to be renewed or removed.

Selections	Options

Example Reports

1 Line format

Detailed format

Detailed format (with

Inactive Patrons

Inactive Patrons

Textbook Tracker

Generates a list of patrons with the status of Inactive

Recommended Replacement: *Patron Information* report selecting by a status of Inactive

Use(s)

Run this report regularly to see which patrons need to be renewed or removed.

Selections	Options

Example Reports

Inactive Patrons Report (1 Line).pdf	Inactive Patrons R...ort (Detailed).pdf	Inactive Patrons R...t
1 Line format	*Detailed* format	*Detailed* format (with

In-Transit from Current Site, Late in Arriving

In-Transit from Current Site, Late in Arriving

Generates a list of items that are in-transit from the current site and late in arriving

An item is considered late in arriving when it's in transit longer than what's specified in **Circulation Preferences > Circulation Settings > Average In Transit Period**.

Selections	Options

Example Reports

In-Transit from Cu...rriving Report.pdf	In-Transit from Cu... Arrival Date).pdf
Show Expected Arrival Date unchecked	*Show Expected Arrival Date* checked

In-Transit to Current Site, Late in Arriving

Generates a list of items that are in-transit to the current site and late in arriving

An item is considered late in arriving when it's in transit longer than what's specified in **Circulation Preferences > Circulation Settings > Average In Transit Period**.

Selections	Options

Example Reports

Show Expected Arrival Date unchecked	Show Expected Arrival Date checked
In-Transit to Curre...Arriving Report.pdf	In-Transit to Curre...d Arrival Date).pdf

Library Use Copies

Library Use Copies

Generates a list of copies currently assigned to the Library Use System Patron (barcode 3)

Recommended Replacement: *Special Status Copies* report selecting by a status of For Library Use (3)

These copies could be holiday books reserved for library reading events or books used in displays.

Use(s)

Run this report to make sure all of the copies you need for upcoming library book displays or reading events are assigned to Library Use.

Selections	Options

Example Report

Library Use Copies Report.pdf

Lost Items Charge Notice

Lost Items Charge Notice

Generates notice slips for patrons with unpaid lost item charges

Recommended Replacement: *Unpaid Charges Notice* report with either the *All Charges, Fees, and Fines* or *Lost Fees Only* options

All patrons with an item checked in via the Lost Copies System Patron and an unpaid lost item charge 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 lost item 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 lost item charges.

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

Example Reports

Lost Items Charge... (2 Per Page).pdf

2 Per Page format

Lost Items Charge... (4 Per Page).pdf

4 Per Page format

Lost Items C

Lost Items Charge...s to Parents).pdf

Letters to Parents format

Lost Items Charge...with Summary).pdf

Letters with Summary format

Lost Items C

Lost Items Charge...eport (Email).pdf

Email format (PDF lists all patrons who received an email)

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

Lost Items C

Mailing

On Order Copies

On Order Copies

Generates a list of copies currently assigned to the On Order System Patron (barcode 5)

Recommended Replacement: *Special Status Copies* report selecting by a status of On Order (5)

These are items that have been ordered but not yet received.

Selections	Options

Example Report

On Order Copies Report.pdf
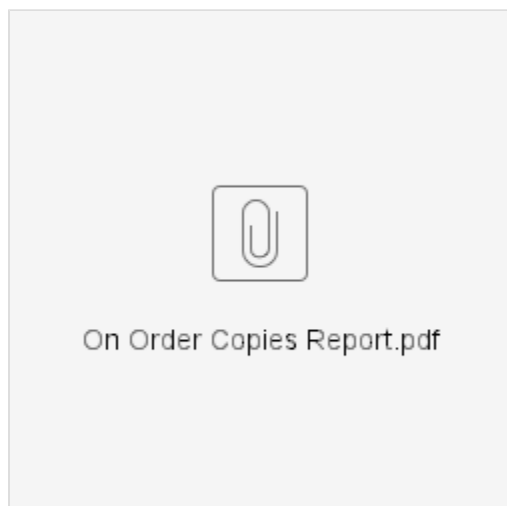
On Repair Copies

On Repair Copies

Generates a list of copies currently assigned to the On Repair System Patron (barcode 4)

Recommended Replacement: *Special Status Copies* report selecting by a status of On Repair (4)

The On Repair system patron keeps track of damaged copies being repaired that aren't available to patrons.

Use(s)

Librarians or aides can run this report to see which copies need to be repaired. Reference the list again when bookdropping repaired copies to make them available again.

Selections	Options

Example Report

On Repair Copies Report.pdf

Overdue Items Information

⚠ This is the old version of the *Overdue Items Information* report. Check out the new report!

Overdue Items Information

Textbook Tracker: *Textbook Overdue Items Information* (Legacy)

Generates a list of items that are overdue along with their due dates and current fines

Recommended Replacement: Updated *Overdue Items Information* report

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

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

Example Reports

Overdue Items Inf... Line) Legacy.pdf	Overdue Items Inf...arges) Legacy.pdf	Overdue Items Inf...u
1 Line format	*1 Line with Charges* format	*1 Line with Serial N*
Overdue Items Inf...ailed) Legacy.pdf	Overdue Items Inf... Cost) Legacy.pdf	Overdue Items Inf...F
Detailed format	*Detailed with Cost* format	*Detailed with F*
Overdue Items Info...t Info) Legacy.pdf		
Detailed with Contact Info format		

Overdue Items Posting List

Overdue Items Posting List

Generates a list of patrons with overdue items and fine amounts

Recommended Replacement: Updated *Overdue Items Information* report using the *Posting* format

Use(s)

Print this report and hang it up in the library or classrooms to remind patrons about their overdue items. Don't want other patrons knowing who has overdue items? Check the **Hide Patron's Name** option. Patrons with overdue items will be able to identify themselves on the list without others knowing.

Selections	Options
⚠ This report now includes a **Title** selection.	**Hide Patron's Name:** When checked, patron names are re

Example Report

Simple format

Detailed format

Patron Credit Details

Patron Credit Details

Textbook Tracker

Generates a list of patrons with credit and the amounts

Recommended Replacement: *Patron Financials Brief* report

Use(s)

Run this report at the end of the year to see which patrons still have credit that needs to be cleared out, if necessary.

Selections	Options

Example Report

Patron Credit Details Report.pdf

Patron Overdue List

Patron Overdue List

Generates a list of all overdue items for selected patrons

Recommended Replacement: Updated *Overdue Items Information* report using the *Detailed* format

Use(s)

Regularly send this report to teachers so they can remind students to return their overdue items. Get reports for particular homerooms or classes by using the *Patrons from* selection.

Selections	Options

Example Report

Patron Overdue List Report.pdf

Patrons with No Email

Patrons with No Email

Generates a list of patrons without a listed primary email address

Textbook Tracker

Recommended Replacement: *Patrons Missing Information* report

Use(s)

- Run this report after importing patron records to see which patrons need to have a primary email address manually added.

- 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	Options

Example Report

Patrons with No Email Report.pdf

Patrons with No Picture

Textbook Tracker
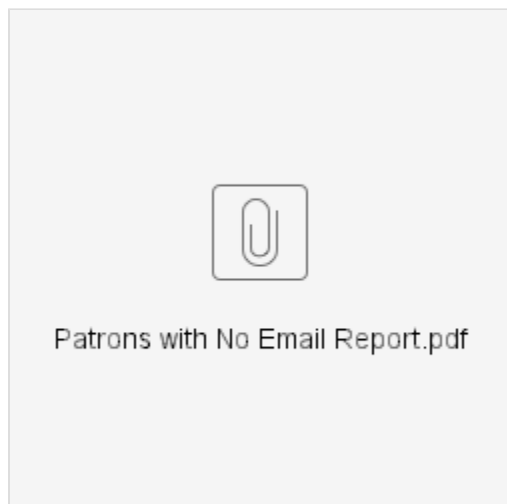
Generates a list of patrons without a picture

Recommended Replacement: *Patrons Missing Information* report

Use(s)

Run this report after importing patron pictures to see if any patrons were missed.

Selections	Options

Example Report

Patrons with No Picture Report.pdf

Routes Information

Generates a list of route names, responsible patrons, and route periods

Selections	Options

Example Report

Routes Information Report.pdf

Routes Patron List

Generates a list of all patrons included in each route

If a patron is included in multiple routes, their name will appear multiple times in the list.

Selections	Options

Example Report

Routes Patron List Report.pdf

Routing Slips

Generates slips for each route listing the route name, responsible patron, route start and end dates, instructions, and patrons included in the route list

Use(s)

Attach a slip to each routed item so patrons know who to pass the item on to next.

Selections	Options

Example Report

Routing Slips Report.pdf

Severely Overdue Items Notice

Generates notices for patrons with items that are severely overdue

Recommended Replacement: *Overdue Items Notice* report selected by a certain number of days overdue (Patrons with items _____ Days 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 severely 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 severely overdue items.

Selections	Options
Patrons with items more than _____ Days Overdue: Enter a minimum number of days overdue. ⚠ This report now includes a **Title** selection.	

Example Reports

Severely Overdue...(2 Per Page).pdf

2 Per Page format

Severely Overdue...(4 Per Page).pdf

4 Per Page format

Severely Ove

Severely Overdue ...s to Parents).pdf

Letters to Parents format

Severely Overdue...ith Summary).pdf

Letters with Summary format

Severely Ove

Severely Overdue ...eport (Email).pdf		Severely Ove
Email format (PDF lists all patrons who received an email)	*Email* format (example of an email sent to a patron)	*Mailing*

Title Information by Award

Generates a list of titles that have won a particular award

Recommended replacement: *Title Information Report*

Award names are saved under MARC field 586_a.

✓ Manage your MARC award terms in **Tools > Authority Control > Titles**.

Use(s)

- Run this report when a librarian, teacher, or student needs a list of titles with a particular award for reading assignments or activities. Note that this information can also be found through Researcher by using the Awards filter in the Search interface.

- Run this report and select by a particular award to see which titles are listed as having that award. Then you can determine which titles need to have the award added or removed.

Example Reports

Title Information b...Report (1 Line).pdf	Title Information b...port (Detailed).pdf	Title Info.
1 Line format	**Detailed** report	**1 Line Lan**

Title Information b…ne - Cover Art).pdf	Title Information b…ed - Cover Art).pdf	Title Information .
1 Line format (including cover art)	*Detailed* format (including cover art)	*Summ*

Title Information by Language

Generates a list of titles written in a select language

Recommended replacement: *Title Information Report*

Use(s)

Librarians or teachers can run this report to get a list of titles in another language while planning lessons and assignments for multilingual students or students learning another language.

Title Information b…Report (1 Line).pdf	Title Information b…port (Detailed).pdf	Title Info…sc
1 Line format	*Detailed* format	*1 Line Landsca*

Title Information b...port (Detailed).pdf	Title Information b...ed - Cover Art).pdf	Title Information ...pc
Detailed format	*Detailed* format (including cover art)	*Summary* f

Back to Top

Title Information by Publisher

Generates a list of titles with the same publisher and/or titles published within a certain range of years

Recommended replacement: *Title Information Report*

Publisher information is saved in the 260_b MARC field, and publishing year information is saved in the 260_c MARC field.

Use(s)

Librarians or teachers can run this report to get a list of titles with particular publishing information for reading assignments or activities.

Example Reports

Title Information b...Report (1 Line).pdf	Title Information b...port (Detailed).pdf	Title Info...sc
1 Line format	*Detailed* format	*1 Line Landsca*

1 Line format (including cover art)	Detailed format (including cover art)	Summary f

Unknown Copies

Generates a list of copies currently assigned to the Unknown Patron System Patron (barcode 8)

Recommended Replacement: *Special Status Copies* report selecting by a status of Unknown Patron (8)

This system patron keeps track of copies that have been temporarily misplaced.

Selections	Options

Example Report

Titles with No Cover Art

Generates a list of titles that don't have cover art

Selections	Options

See titles that currently don't appear in Researcher. Include records for:

Titles with a Policy of [Any Policy ▼]

Titles with a Medium of [Any Medium ▼]

Titles in Call Number Range [From] [Through]

Titles added [From MM/DD/YYYY 📅] [Through MM/DD/YYYY 📅] [▼]

Title [ ]

Titles by Author [ ]

✔ Show Additional Selections   Create Saved Report   Run

Sort by [Title Call Number ▼]

Format [1 Line ▼]

Cre

Example Reports

Titles with No Cov...eport (1 Line).pdf

1 Line format

Titles with No Cov...ort (Detailed).pdf

Detailed format

Titles wit...scape).pdf

1 Line Landscape format

Titles with No Co...ort (Summary).pdf

Summary format