# Sample Patron List Reports

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| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| List of Expired Patrons | Patron full name  Patron barcode  Patron code  Patron expiration date | Patron expiration date | Patron General Filters  Patron branch  Patron Date Filters  Expiration date | Select branch  Pick a range of dates |

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| --- | --- | --- | --- | --- |
| List of Patrons Expired for 3 Years Owing Less Than $5 | Patron barcode  Patron full name  Patron code  Patron branch name  Patron acct charges  Patron expiration date  Patron last activity date | Patron expiration date  Patron last activity date | Patron General Filters  Patron branch  Patron Relative Date Filters  Expiration date more than  Patron Miscellaneous Filters  Charges | Select branch  3 Years  Less than or equal to $4.99 |

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| --- | --- | --- | --- | --- |
| Patrons with email notification but no email address | Patron barcode  Patron full name  Patron email address  Patron alt email address | Patron full name | Patron General Filters  Patron branch  Patron Miscellaneous Filters  Notification option  Email address  Alternate email address | Select branch  Email address  Not present  Not present |

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| --- | --- | --- | --- | --- |
| List of Patrons Added in the Last X Days | Patron barcode  Patron full name  Patron code  Patron branch abbreviation  Patron entry date | Patron entry date  Patron full name | Patron General Filters  Patron branch  Patron Relative Date Filters  Registration date between | Select branch  Enter number |

# Sample Patron Count Reports

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| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| Number of Patrons by Patron Code | Patron code | Patron code | Patron General Filters  Patron branch | Select branch |

# Sample Patron Account List Reports

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| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| List of Patrons that Owe More Than a Certain $$ Amount | Patron full name  Patron barcode  MARC Title  Item call number  Item barcode  Acct. trans. balance-outstanding  chgs. only  Acct. reason (or fee reason)  Patron acct charges | Patron full name | Patron Account Miscellaneous  Filters  Check Charges (amount)  Patron Filters  Patron branch | Ender $$ amount  Select branch |

# Sample Hold List Reports

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| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| Items with x number of holds that your library patrons have requested | Marc browse title  MARC bibliographic record I | MARC browse title | Optional  Number of requests  Hold General Filters  Hold status  Patron General Filters  Patron branch | Greater than X  Select Active & Pending  Select branch |

# Sample Hold Count Reports

|  |  |  |  |
| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| Top requested titles by your patrons | MARC browse author  MARC browse title  MARC bibliographic record ID  MARC primary type of material |  | Optional  Select ‘top’ (number)  Patron General Filters  Patron branch | Enter a number  Select branch |

# Sample Item List Reports

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| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| List of Items with Local Holds Only | MARC Title  Item Barcode  Item Call Number  Item Creation Date  Item assigned collection name | Item creation date | Item General Filters  Branch  Item Relative Date Filters  Creation date between  Item Checkbox Filters  Patrons from this branch only checked  Or  Patrons from this library and branches checked | Select branch  Enter a number  Check only one of these boxes. |

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| --- | --- | --- | --- | --- |
| List of Newly Added Items | MARC Author  MARC Title  Item Call Number  Item Assigned Collection Name  Item First Available Date | Item Call Number | Item General Filters  Branch  Item Relative Date Filters  (between two dates)  First available date between | Select branch  Enter a number |

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| --- | --- | --- | --- | --- |
| Items With No Price | Item assigned collection name  Item barcode  Item call number  MARC title  MARC author  Item circ status  Item creation date | Item assigned collection name  MARC title  Item creation date | Item General Filters  Branch  Record status  Item Checkbox Filters  Price not present | Select branch  Final |

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| --- | --- | --- | --- | --- |
| Deleted Items  (must run before the final delete that happens at 5am on the last day of each month) | Item assigned collection name  Item barcode  Item call number  MARC title  MARC author | Item assigned collection name  Item call number | Item General Filters  Branch  Record status | Select branch  Deleted |

# Sample Serials List Reports

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| --- | --- | --- | --- |
| Report Description | Columns Selected for Output | Columns Selected for Sort | Filters |

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| --- | --- | --- | --- | --- |
| Weeding Report for Serials | Marc browse title  Issue/part designation  Item barcode  Item lifetime circ count  Item status  Item YTD circ count | MARC browse title | Holdings Record General Filters  Destination organization branch  Issue/Part General Filters  Status | Select branch  Received |

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| --- | --- | --- | --- | --- |
| Union List of Serials | Marc browse title  MARC ISSN  Holdings record subscription  status  Holdings record retention note | MARC browse title | Holdings Record General Filters  Destination organization branch | Select branch |