Create List Reports for Account Holder Retention Lab Project

Total Unexpired Account Holders:

MHLS purges patron records every January, deleting records that have been expired for 3+ years and with fines of less than $10. To avoid including only those expired accounts with fines in your report, these instructions suggest removing expired accounts.

You may also need to do a bit of work to remove duplicate records. This most often will happen when a patron already has an account and a new, online account that has not yet been merged with the existing account. It is recommended that you check for possible duplicates by exporting your report to Excel and sorting on the name field and scanning for duplicates. Subtract any duplicates from your total count. Instructions on exporting can be found at HERE.

**Type:** Patron

**Field:** P Type or Home Library (whichever you prefer, be consistent in all reports)

*P Type will capture all account holders who reside in your service area; Home Library will capture those patrons who prefer to use your library, regardless of where they live. In the first two examples, we show use of P Type; in the final three examples, Home Library*

**Condition:** Equals (or Starts with, if using Home Library)

**Value A:** P Type (or your library location—ex., hls)

AND

**Type:** Patron

**Field:** Card expires

**Condition:** Greater than or equal to

**Value A:** Today’s date or date from which you are measuring (1/1/21, for example)

*If using a date in the past, you will need to exclude any new accounts created since that date by adding Field: Created; Condition: Less Than; Value A: that start date.*
Total Account Holders with Email:

**Type:** Patron

**Field:** P Type (or Home Library)

**Condition:** Equals (or Start with)

**Value A:** P Type (or your library location)

AND

**Type:** Patron

**Field:** Card expires

**Condition:** Greater than or equal to

**Value A:** Today’s date or date from which you are measuring (1/1/21, for example)

AND

**Type:** Patron

**Field:** Email Address

**Condition:** Not equal to

**Value A:** [Do not enter a value]

![Search Screen Screenshot]

**Search Criteria:**

1. PATRON P TYPE equal to “33” AND PATRON Card Expires greater than or equal to “01-01-2021” AND PATRON EMAIL ADDR not equal to”
New Account Holders—Account Holders Added Each Month or Year:

**Type:** Patron

**Field:** P Type (or Home Library)

**Condition:** Equals (or Starts with)

**Value A:** P Type (or your library location)

AND

**Type:** Patron

**Field:** Created

**Condition:** Between

**Value A:** Start of the date range you are searching

**Value B:** End of the date range you are searching

In this case we are searching patrons who created accounts in 2020. You can also do monthly reports.
Active Account Holders:

This report can only tell you if an account holder’s most recent activity was during this period, so you should run the report immediately at the end of the period you want to capture. If an account holder was active last month and then again this month, you cannot, at the end of this month, capture whether or not that patron was also active in the previous month.

The Circ Active field of the patron record records the most recent date one of the following circulation activities was performed for or by the account holder:

- checking out an item
- checking in an item
- renewing an item
- placing a hold
- logging in to their account
- using resources that require logging in with their barcode or creating a user account, such as Overdrive, hoopla, Kanopy, Libro, etc.
- paying fines via the Fines Payment Web Service

Sierra assign a date to this field every time one of these actions occurs. This includes activity online that verifies accounts using any of the services listed above.

**Type:** Patron

**Field:** P Type (or Home Library)

**Condition:** Equals (or Starts with)

**Value A:** P Type (or your library’s location)

AND

**Type:** Patron

**Field:** Circ Active

**Condition:** Between

**Value A:** Start of the date range you are searching

**Value B:** End of the date range you are searching [In this example, patron’s active in 2020]
Inactive Account Holders:

In this report, we want to find all account holders who were not active in the current reporting period, but were active in the previous one. We, therefore, use a Between condition as we do for the Active Account Holder report, but change the dates to the previous reporting period.

**Type:** Patron

**Field:** P Type (or Home Library)

**Condition:** Equals (or Starts with)

**Value A:** P Type (or your library’s location)

AND

**Type:** Patron

**Field:** Circ Active

**Condition:** Between

**Value A:** Start of the date range you are searching

**Value B:** End of the date range you are searching

In this case, we are looking for all patrons who were active in 2019, but were not active in 2020 or later.

To Export Reports, see [https://kb.midhudson.org/create-list-getting-started/exporting/](https://kb.midhudson.org/create-list-getting-started/exporting/)