

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.

The screenshot shows a 'Boolean Search' interface with the following fields and values:

- Review File Name: Account Holders with Email
- Store Record Type: PATRON p
- Range: [dropdown]
- Start: p10000008
- Stop: p17457373

The search criteria are defined in a table:

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	P TYPE	equal to	33	
2	AND	PATRON	Card Expires	greater than or equal to	01-01-2021	- -

The resulting search string is: PATRON P TYPE equal to "33" AND PATRON Card Expires greater than or equal to "01-01-2021"

Buttons at the bottom include: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close. A sidebar on the right contains: Group, Ungroup, Insert Line, Append Line, Delete, Clear All.

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]

The screenshot shows a 'Boolean Search' window with the following details:

- Review File Name: Account Holders with Email
- Store Record Type: PATRON p
- Range: Start p10000008 Stop p17457373
- Search Mode: Classic
- Search Criteria Table:

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	P TYPE	equal to	33	
2	A AND	PATRON	Card Expires	greater than or equal to	01-01-2021	- -
3	AND	PATRON	EMAIL ADDR	not equal to		

The resulting search query is: 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 ""

Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All

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

The screenshot shows a 'Boolean Search' window with the following details:

- Review File Name: New Account Holder
- Store Record Type: PATRON p
- Range: Start p1000008, Stop p17457373
- Classic search mode is selected.
- The search table contains two terms:

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	HOME LIBR	starts with	hls	
2	AND	PATRON	CREATED	between	01-01-2020	12-31-2020

The resulting search string is: PATRON HOME LIBR starts with "hls" AND PATRON CREATED between "01-01-2020"and "12-31-2020"

Buttons at the bottom include: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close.

Buttons on the right include: Group, Ungroup, Insert Line, Append Line, Delete, Clear All.

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]

The screenshot shows the Boolean Search interface with the following details:

- Review File Name:** New Account Holder
- Store Record Type:** PATRON p
- Range:** Start: p10000008, Stop: p17457373
- Classic Search Table:**

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	HOME LIBR	starts with	his	
2	AND	PATRON	CIRCACTIVE	between	01-01-2020	12-31-2020

The resulting search query is: PATRON HOME LIBR starts with "his" AND PATRON CIRCACTIVE between "01-01-2020"and "12-31-2020"

Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All

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.

The screenshot shows the Boolean Search interface with the following configuration:

- Review File Name: New Account Holder
- Store Record Type: PATRON p
- Range: Classic
- Start: p10000008
- Stop: p17457373

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	HOME LIBR	starts with	his	
2	AND	PATRON	CIRCACTIVE	between	01-01-2019	12-31-2019

The resulting search string is: PATRON HOME LIBR starts with "his" AND PATRON CIRCACTIVE between "01-01-2019" and "12-31-2019"

Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All

To Export Reports, see <https://kb.midhudson.org/create-list-getting-started/exporting/>