

Lines by Patron Role Report

Process overview

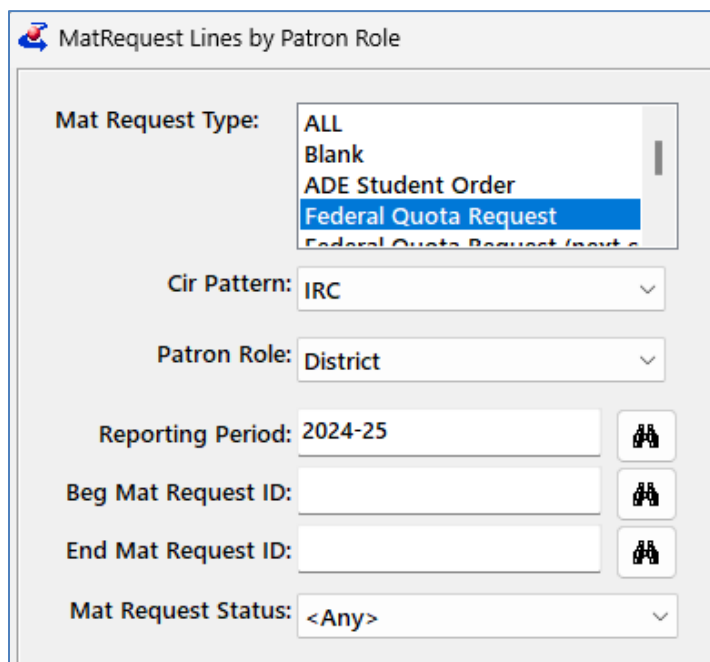
The Lines by Patron Role Report returns all of the Material Request lines that meet a flexible set of criteria for a given time frame, grouped by Patron Role. This report replaces the Students Served report previously run by Customer Support.

Use the provided [Lines by Patron Role: Reference Worksheet](#) to record which parameters you use for easy reference the next time you run the report.

The sections below include **INSTRUCTIONS** followed by **EXAMPLES**.

Instructions

1. In the Material Requests module, use the Reports menu to select LINES BY PATRON ROLE.
2. Set the parameters as desired.



- a. **Mat Request Type** – Leave this set to “all,” or select the specific type(s) to include.
- b. **Cir Pattern** and **Patron Role** – Set the associated Cir Pattern first, then the role. For example, selecting Cir Pattern: IRC and Patron Role: Student will return only those lines ordered for students, with the results grouped by student.
- c. **Reporting Period** – Set this to limit results to a given school year, calendar year, or other reporting period. Leave blank for “all.”
- d. **Begin** and **End Mat Request ID** – Set these to limit results to the specified MatReq range. Leave blank for “all.”
- e. **Mat Request Status** - Leave this set to “any,” or select the specific Status to include.

Mat Request Line Type:

Med Code:

Last Action Code:

Beg Last Action Date:

End Last Action Date:

Beg Last Ship Date:

End Last Ship Date:

- f. **Mat Request Line Type** - Leave this set to “all,” or select specific type(s) to include.
- g. **Med Code** - Leave this set to “all,” or select the specific Medium to include.
- h. **Last Action Code** - Leave this set to “all,” or select specific Last Action(s) to include.
- i. **Beg and End Last Action Date** - Set these to limit results by when the Last Action occurred. Leave blank for “all.”
- j. **Beg and End Last Ship Date** - Set these to limit results by when the line items were last shipped. Leave blank for “all.”

3. Set the output controls to specify how much information to include about each line.

Include In Output:

Sub Types In Total:

Detail or Summary:

- a. **Include in Output** – Select which columns to include in the report output.
 A default can be set for this field; contact Customer Support with your list of preferred default values.
- b. **SubTypes in Total** – If you use Line SubTypes, select which to include in the Total Cost calculation.
- c. **Detail or Summary** – Select whether to return all lines that meet your parameters, or only the summary Totals for those lines.

4. Use the RUN button immediately run the report and return the results in a web browser.

OR, switch the Output radio button from Preview to Email, enter your address, and use RUN AS BATCH JOB to run the report at the specified date and time.

Examples

The following examples show how this report can be used for a few different purposes. Please remember that the options available in your system will vary depending on your local setup.

Example 1: Students Served summary by District

This example includes only the Federal Quota Material Requests for the previous school year, and lines with a Last Action Code of “Shipped – Emailed Order Complete,” “Shipped Completely,” or “Shipped Partially.” Only the summary totals are returned, not individual lines. The Include in Output can be ignored, since that applies to the lines, not the summary.

These criteria could be used to report to the districts how many students were served, with what dollar value.

Parameters:

| | |
|---|--|
| Mat Request Type: ALL Blank ADE Student Order Federal Quota Request Federal Quota Request (next) | Mat Request Line Type: ALL |
| Cir Pattern: IRC | Med Code: ALL |
| Patron Role: District | Last Action Code: Reserve Pending Shipped Emailed Order Complete Shipped Completely Shipped Partially Transcription in process Item UnAssigned From Patron |
| Reporting Period: 2024-25 | Beg Last Action Date: |
| Beg Mat Request ID: | End Last Action Date: |
| End Mat Request ID: | Beg Last Ship Date: |
| Mat Request Status: <Any> | End Last Ship Date: |
| Include In Output: Lowest Role PatronID Last ShipDate Last ActionCode Last Action Date Line UserRef1 Line UserRef2 Line UserRef3 | Sub Types In Total: ALL |
| | Detail or Summary: Summary |

Output:

| District ID | District Name | #Students | # Copies | # Titles | Sub Qty for blanktype | Total Sub Quantity | Total Cost |
|-------------|---------------|-----------|----------|----------|-----------------------|--------------------|-------------|
| 030201000 | | 2 | 8.00 | 7 | 0 | 0 | \$9,478.00 |
| 070204000 | | 27 | 206.00 | 112 | 0 | 0 | \$25,824.50 |
| 070211000 | | 5 | 21.00 | 14 | 0 | 0 | \$8,794.00 |
| 070241000 | | 38 | 105.00 | 64 | 0 | 0 | \$14,607.30 |
| 070248000 | | 17 | 128.00 | 93 | 0 | 0 | \$13,626.90 |

Example 2: Braille Production by Customer

This example includes only the Braille Services request lines Invoiced in the previous quarter. All lines will be listed in addition to the summary table, broken out by Customer.

These criteria could be used to track and report on Braille Production, including total pages produced (as tracked in the Sub Type and Sub Quantity).

Parameters:

| | |
|---|--|
| Mat Request Type: Braille Sales Braille Services Equipment K-12 Grant | Mat Request Line Type: ALL BNon textbook, New Transcription BNon textbook, Overlay BNon textbook, Prev. Transcribed Purchased, New Textbook |
| Cir Pattern: CR | Med Code: ALL |
| Patron Role: Customer | Last Action Code: Embossing Needed Invoiced NIMAS Requested No Charge / No Invoice No Action/Just Entered OK to Generate Invoice |
| Reporting Period: | Beg Last Action Date: 07/01/2025 |
| Beg Mat Request ID: | End Last Action Date: 09/30/2025 |
| End Mat Request ID: | Beg Last Ship Date: |
| Mat Request Status: <Any> | End Last Ship Date: |

| | |
|--|--|
| Include In Output: Lowest Role PatronID Line Type Line Type Desc Last ShipDate LastActionCode Last Action Date Line UserRef1 | Sub Types In Total: ALL File/Document Hours Braille Pages Print Pages |
| | Detail or Summary: Detail |