# Handy Polaris Reports

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(For *Polaris Reports to Run Regularly*, see the list at www.peacelibrarysystem.ab.ca/reports)

** Reports are found in Polaris under Utilities > Reports and Notices **

When generating reports, they default to a PDF output; however, you can select an Excel spreadsheet output if you would like to be able to sort the report's data. When you are at the report's name in *Reports and Notices*, BEFORE you click to open and start the report—RIGHT CLICK on the report's name and from the pop-up menu that appears, select the output format that you prefer.
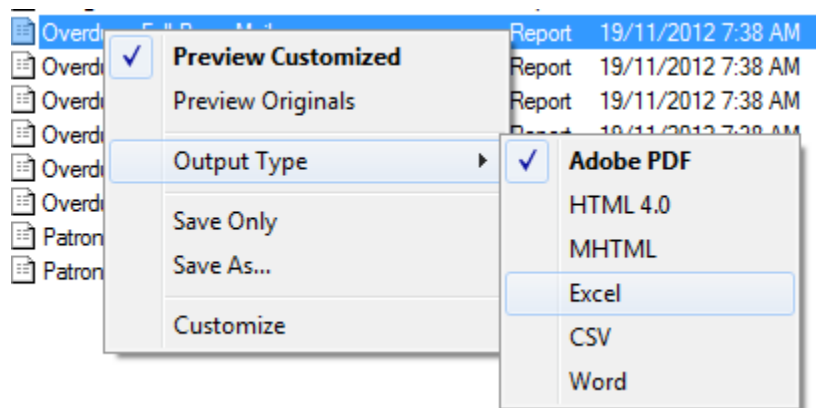
Annual Report – Peace Library System runs this report and sends it to you annually to assist with filling in your Annual Report to the Public Library Services Branch. However, you may wish to run it, as it is also a useful report to run monthly to show your board information at board meetings. **(Found under Custom.** Note: it can take half an hour to generate this report depending on the date range selected.

Billed Patrons – Lists the patrons and the items for which they have been billed. **(Found under Public Services>Patron Financial)**

Circ Analysis – This report can help evaluate staffing needs. **(Found under Custom)**

Circ by UDF - User Defined fields can be created specific for your library. You can then look at the circs for each user defined field. UDF 1 is for "Where They Live". **(Found under Custom)**

Circulation by…. (All are found under Circulation)
- *Collection Material type Analysis -* This report shows you your number of circulations (check outs not renewals) and the percentage of total by collection code within a given time frame.
- *Items Assigned Branch –* Shows libraries that are circulating your items within a given time frame; only shows checkouts not renewals.
- *Items Loaning Branch –* Shows your library circulating other libraries' items within a given time frame; includes items checked out and renewed.
- *Workstation –* Identifies the workstations and how much they circulate.

Claimed Items – This report will show you all of the items that you own that have the status of Claimed Returned or Claimed Never Had. You should check your shelves monthly to see if these items turn up. After six months you can consider them lost and invoice the transacting library. This report does not identify the transacting library, so you will need to look at the item record to find that information. **(Found under Cataloguing > Item)**

Classification Number List – A collection development tool for your non-fiction. Choose a Dewey number range and see which items your library has in the range along with their Dewey numbers. This can help you see where you have holes in your collection. **(Found under Cataloguing > Item)**

Collection Count by Code-MLS – A quick look at the number of items in each collection code in your library (Marigold created this report but it can be used by any library.) **(Found under Custom)**

Collection Value by Organization – This report shows the monetary value of the collections in your library so you know what your collection is worth for auditing and insurance purposes. It breaks down the value of each collection and gives a grand total of the entire collection. **(Found under Cataloguing > Item)**

Daily Notification Summary – Can see all the notices sent out and the status. This is great to have in situations where patrons say they were not notified. You can double check on this report. You can request to have this report sent to you every morning. *smaller libraries can run this report weekly* **(Found under Custom)**

Delinquent Patrons – Identifies patrons (name, phone, barcode) who have system blocks, free text blocks, or library-defined blocks on their records. **(Found under Circulation)**

Expired Patrons – This report shows any patron whose account will be expiring before a specified date from a specified library. This report includes patron name, patron code, patron barcode, patron address and the expiration date. This report is optional -- FYI. **(Found under Public Services > Patron Services)**

Expired Requests – This report lists expired hold requests for the specified library. It contains call number, author and title, barcode, patron name, phone number, patron library and expiration date. This report is optional -- FYI. **(Found under Circulation > Holds)**

Fines and Fees – Lists the date a charge was levied, the reason, amount, title of item, the staff person who processed the charge, and the patron barcode. **(Found under Public Services > Patron Financial)**

Fines and Fees Summary – Shows total fines and fees charged, waived, and paid over a specific time period. **(Found under Public Services > Patron Financial)**

Held Call List – This report lists currently held items awaiting pickup by patrons at the specified library. Includes patron name, phone number, item title, call number, held date and hold expiration date. **(Found under Custom)**

Holds Purchase Alert – Shows holds ratios within TRAC to help determine what to purchase. **(Found under Circulation > Holds)**

In-House Use – This report is only relevant to libraries that keep track of in-house use. It reports the number of items used within a specified library, sorted by material type. These counts are taken from the "Year-to-Date In-house use" and "Lifetime In-house use" counters within the item records. Both counters follow the year-end rollover schedule (If you desire a statistical total for the complete year, it must be run prior to closing on the last day of the year as the "Year-to-Date" amount will reset back to zero at the beginning of each new year). **(Found under Circulation)**

In-Transit and Transferred Items – Run this report monthly to catch any of your library's items that have been in-transit or transferred for longer than two months. Check your shelves for the item, and contact the sending and receiving libraries to see if the item is on their shelves. **(Found under Custom)**

Item Circulation by Collection – This report lists the number of items, checkouts, renewals and combined checkouts and renewals by collection code for a given library within a given time frame. **(Found under Circulation)**

Item Circulation Statistics – This report lists number of items, checkouts, renewals and combined checkouts and renewals by material type for a given library within a given time frame. **(Found under Circulation)**

Items with Default Price - This shows you every item at your library that still has the default price of $25.44. You can run this report and start changing the prices to the correct prices to clean the records. **(Found under Custom)**

Local Hold Request & Item Counts by Branch – This report can be used for collection development. It shows a list of items your patrons are requesting from other libraries that you might want to purchase for your library. **(Found under Circulation > Holds)**

Lost Holds (Bib-Level Only) by Item Assigned Branch – This report shows holds for items where your library is the only library to have an item associated with the Bib-record, and the request has not been filled. **(Found under Custom)**

Lost Holds (Item Specific Requests) by Library – This report shows item specific requests that have not been filled. **(Found under Custom)**

Lost Holds (Bib-Level Only) by Patron Branch – This report shows if any of your patrons are waiting on items where the hold got lost. With the information you can go into the patrons account and cancel the hold and then reactivate the hold. This will put it on the libraries hold requests to fill report and it will keep the patron's spot in the queue. **(Found under Custom)**

Lost Items – This report shows all of your library's items that have been lost and need to be resolved. Follow the procedure at www.peacelibrarysystem.ab.ca/TRAC-Procedures to reconcile these items.

Missing Items – Run this report monthly to identify items that have been missing for six months or more. Check your shelves for the items. **(Found under Custom)**

Municipality Membership – This shows you the different municipalities your library patrons live in. You can search in the find box at the top for you library. **(Found under Custom)**

Notification Summary by Date – With this report you can go back to any date to find out whether a patron was notified about an item. **(Found under Custom)**

Patron Circulation Statistics – This report provides total circulations (checkouts and renewals) by Patron Code within a chosen date range. **(Found under Circulation)**

Patron Code Statistics – This report provides the number of patrons transacting by Patron Code and Statistical Class within a chosen date range. This report also helps to catch when an incorrect Patron Code (compared to the Statistical Class) has been assigned to a patron record. **(Found under Circulation)**

Patron Cross Borrowing – This is a handy report to see which patrons from other libraries are using your library. **(Found under Circulation)**

Patron Detail (Schools) – You need to have patron record sets for this report to work. It is great for keeping track of book clubs or school classes. It will populate a list of people from the record set and show all the items out, holds, etc. **(Found under Custom)**

Patrons without Addresses – This report lists patrons for whom you do not have an address on record. **(Found under Public Services > Patron Services)**

Posting to the Database, Overdues – Do weekly, to update the status of overdue items your patrons have out. **(Found under Notices > Overdues folder > Overdues Full Page Mailer)**

Posting to the Database, Billings – Do weekly, to switch long overdue items to lost that your patrons have out. **(Found under Notices > Overdues folder > Billings Full Page Mailer)**

Renewals over the limit – Other library's items – You can see any items that belong to other libraries which have been renewed by your staff beyond the limit. **(Found under Custom)**

Renewals over the limit – Your items – You can see which libraries are renewing your books over the renewal limit. **(Found under Custom)**

Request Manager – This report should be run each day you are open. It lists the requested materials that your library should put in transit to fill a hold. **(Found on the Polaris toolbar under Circulation)**

Statistical Summary (Custom) – You may wish to run this report monthly to present to your Board meeting. Select the date range (and time range) desired. The report includes statistics about patron counts and circulation, as we as ILLs borrowed and lent, and TRACpac activity. **(Found under Custom)**

Telephony Failures – Note: This report will usually come up blank. *Smaller libraries can run this report weekly* **(Found under Custom > Telephony)**

Top 100… - A quick view of the top 100 titles in TRACpac for Audio, AV, or Print by Holds Ratio. If a title has a high holds ratio, you may wish to purchase a copy to help reduce the wait time for patrons. **(Found under Custom > Top Holds by Ratio)**

Top Circulating Titles by Collection – See your library's top circulating titles by collection code within a date range. **(Found under Circulation)**

Turnover Rate – View the turnover rate (# of items in collection code/# of checkouts) of each of your collection codes within a date range. **(Found under Circulation)**

Unclaimed Holds by Assigned Branch – You may run this report to discover which libraries are holding your library's items on their holds shelf beyond the hold expiry date. **(Found under Custom)**

Unclaimed Holds by Pickup Branch – Items on your holds shelf should not be held for patrons beyond the hold expiry date. Run this report weekly to determine which items have been sitting on the holds shelf long enough and should now be checked back in and put in transit. **(Found under Custom)**

Waived Fines – This shows a listing of all waived fines for a certain period of time with details. **(Found under Public Services > Patron Financial)**

Wandering Patron Notices – Useful in knowing which wandering patrons are using your library that have received overdues, fines, bills and/or combined notices. You will have to look into each account to get more details of which notice it was. *smaller libraries can run this report monthly if at all* **(Found under Custom)**

Weeding Report – Simple with Collection Filter – Helpful when weeding a collection. Items on the list have not circulated in the current or previous year. You can choose the number of circulations ever when creating the report. **(Found under Custom)**