# Polaris Reports to Run Regularly

Automated TRAC libraries run the following reports regularly to communicate well with each other, ensure smooth function of interlibrary loans, stay on top of overdues and billings, and to keep the TRAC database current.

## Daily Reports

❖ **The Request Manager** *(Polaris toolbar > Circulation > Request Manager)*

Retrieve the items from your shelves, check them in, and send them out.

✔ If the hold's pop-up message does not appear, look up your item record using the Find Tool, and under *Links*, select *All Hold Requests*. If a hold request workform appears, check that it says "active" in the top left corner. If it does, click the "gas gauge" icon in the toolbar and scan the item's barcode to fill the request now.

✔ If you cannot find an item on your shelves, select ***Ask Me Later***  (do **not** use *Deny Hold).* If within a day you cannot find the item, go into the item record and change its status to *Missing* to stop Polaris from trying to fill requests with your item. Polaris will forward the request to the next library that has an available copy. If you find your item, run it through check-in to change its status back to *In*.

❖ **Lost Holds...Item by Assigned Branch** *(Utilities > Reports & Notices > Custom folder)*
❖ **Lost Holds...by Library** *(run **both** reports)*

Requests placed on the last copy or placed at the item level may "drop off" your Request Manager if not filled that day. Run *both* reports to capture these lost holds.

Retrieve the items from your shelves, check them in, and send them out. If a hold request does not pop up, go into the item record, select "Links" and click All Hold Requests. If a hold appears, double

click it and at the top of the screen that opens, click the gas gauge icon to "Fill request now." 

✔ If you cannot find an item on your shelves, go into the item record and change its status to *Missing*. If you find the item, run it through check-in to change its status back to *In*.

# Weekly Reports

❖ *Posting to the Database!  Required.*

*Overdues Full Page Mailer (Utilities > Reports & Notices > Notices folder > Overdues folder)*
*Billing Full Page Mailer (run both reports)*

✓ Each report will ask you to *Post to the Database*.  It is essential that you click "**yes**" for each of them.

✓ ***You must notify your MAIL patrons about their overdues and billings***.  *Posting to the Database* affects your **MAIL** notification patrons, and Polaris cannot actually notify them for you.  Each report will generate a list of overdues or billings.  Use these reports to contact the patrons.  You may phone to notify of overdues, but you must provide a print-out to notify of a billing.  Print and/or save the reports BEFORE closing the screen.  To save: *File > Save As > PDF > add date to file name.*  To retrieve the saved reports look in your *My Documents folder > My Reports folder.*

✓ If the lost item does not belong to your library, the Owning library will also create an invoice and will mail it to you (the Transacting library).  The Transacting library is obligated to pay the invoice, according to the *TRAC Operational Guidelines*, regardless of whether you are able to recoup the cost from your patron.  It is essential to post to the database so you can contact your patrons about their overdues to avoid billings and invoices!

❖ *Lost Items (Utilities > Reports & Notices > Custom folder)*

You will want to keep up with other libraries whose patrons have lost your items.  It is your responsibility, as the Owning library, to send out invoices in a timely manner.

Invoice the *Transacting Library, NOT* the Patron Library.

✓ When you receive payment, note it in the Temp Location field of the item record.
✓ Delete Lost item records once you have resolved the matter (received payment or decided not to invoice) so they don't keep showing up in your weekly Lost report.
✓ You may wish, but are not required, to use the invoice template and tracking sheet provided at http://www.peacelibrarysystem.ab.ca/TRAC-Procedures.

❖ *Unclaimed Holds by Pickup Branch (Utilities > Reports & Notices > Custom folder)*

Patrons should pick up their requested items from the Holds Shelf within a week of the item arriving at the library.  After a week, check the item back in and send it on to either the owning library or the next requesting library, as directed by Polaris.

✓ The right column indicates the date each item on the Holds Shelf should be returned or sent on.  Please do not hold the item beyond this date.

✓ If you wish to check up on libraries that have your library's items sitting on their Holds Shelf too long, run your Request Manager and sort it BY: *Item;* STATUS: *Unclaimed.*

# Monthly Reports

❖ *In-Transit and Transferred Items* *(Utilities > Reports & Notices > Custom folder)*

Sometimes items appear to be "stuck" in the Transferred or the In-Transit status. This may be due to the Owning, Sending, or Receiving library accidentally re-shelving the item or forgetting to check it in.

This report identifies the date your items were put in-transit or transferred. If the item has been in this status for two months or longer:

✓ Look on your shelf for the item, if found check it in and deal with as directed.
✓ If not found, contact the Sending Library, and the Receiving Library, and ask them if they may have accidentally shelved your item. If they have, they should check it in, and send it on as directed.
✓ If the item is not found, pretend to check it in. If you are asked to transfer the item to a patron, say "no", and then say "yes" to reinstate the hold. This sends the patron's hold on to another library's available item to fill the request. (Except if yours was the only item in TRAC, then you will have to say "no" to reinstating the hold.) Then go into the item record and change its status to *Missing*.
✓ If the item is found, check it in to change its status back to *In*.

❖ *Missing Items* *(Utilities > Reports & Notices > Custom folder)*

Check your shelves for the item. If you find it, check it in.

✓ If you cannot find the item and it has been missing for six months or more pretend to check it in, then go into the item record and change its status to *Withdrawn*.
✓ If the item is found, check it in to change its status back to *In*.
✓ In order to keep the database up-to-date, items that have been *Missing* for one year or more will be deleted by Central Site.

❖ *Claimed Items* *(Utilities > Reports & Notices > Cataloguing > Item folder)*

This report identifies all your items that a patron (yours or another library's) has *Claimed returned* or *Claimed never had*. This is a final status in Polaris, but some libraries wish to invoice for claimed items.

✓ Use this report to check your shelves to see if the item has shown up. Run the item through check in to change its status back to *In.*
✓ Do not use this report to generate Claimed to Lost invoices, as it does not provide the Transacting library to bill. You can identify the Transacting library by going into each Item Record in the report and looking under its Circulation view. The Loaning Branch that displays is the Transacting Library to invoice. The *Claimed to Lost Procedure* is at www.peacelibrarysystem.ab.ca/TRAC-Procedures.
✓ If the patron advises that the Claimed item is now Lost, the Registered Library may go into its patron's (or wandering patron's) record and switch the Claim to Lost, which will also update the item record. Do this in the patron's Status View, under the Claim icon ⬛. Highlight the claimed item and then click the Declare Lost icon ◌ on the right side of the screen.

❖ *__Statistical Summary (Custom)__* *(Utilities > Reports & Notices > Custom folder)*

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 well as ILLs borrowed and lent, and TRACpac activity.