**Polaris Canned Report Descriptions**

**Polaris Cataloging Reports**

To access Cataloging reports, select **Utilities** from the Polaris Shortcut Bar, and select **Reports and Notices, Cataloging**. If your library has a license for Polaris Community Profiles, standard Community reports are available.

***Authority Reports—these will be run by SHARE staff***

***Bibliographic Reports***

***Please do not run the following reports—they cannot be limited by branch, so run across the entire database. They will be run by SHARE staff as needed.***

Bibliographic Records No Longer In Database

Bibliographic Records That Do Not Display in PAC

Bibliographic Records with No Format

Bibliographic Records With No Linked Authority Records

Bibliographic Records with No Linked Items

Provisional Bibliographic Records

Subfield 9 utility log

**The following bibliographic reports may be run as desired:**

**Macros for Bibliographic Records - All Staff Members**

Identifies the macros create by all staff members who work with bibliographic records. For each macro, the report specifies the macro name, shortcut keys, description of the macro’s purpose, creation date, and staff member who added the macro.

**Macros for Bibliographic Records - Single Staff Member**

Identifies the macros created by a single staff member who works with bibliographic records. Select the staff member’s name. For each macro, the report specifies the macro name, shortcut keys, description of the macro’s purpose, creation date, and staff member who added the macro. Generate this report to see a printed copy of your macros.

**New Titles Imported**

Identifies the titles that have been added to your collection during a specified time period.

**Item Reports**

For Item reports, except for the In-Transit Items report, you can select all organizations, multiple organizations, or a single organization. If you select specific organizations, the report includes item record information only for items owned by the selected organizations.

**Call Number List**

Item record-level listing of call numbers to be used by catalogers who need to assign call numbers. The report is sorted by classification (ignoring prefix) so you can see the detail of already assigned call numbers and determine where to insert the call number you are constructing.

**Claimed Items**

Use this report to track missing items that patrons have claimed they returned or never checked out. The Claimed Items report lists all items that have a circulation status of Claim returned or Claim never had, and identifies the last patron known to have borrowed the item.

**Collection Disposition by Material Type Report**

You can select the branches to include in the report and group the data by branch or collection. The report shows the number and percentage of items currently on the shelf (or otherwise considered available), items out (unavailable but accounted for), or not accounted for (lost, missing). It shows a sum total for each branch and a grand total for all branches selected. If the report is grouped by collection, it is broken down by collection and shows the totals for each collection for all selected branches. The count is broken out by the material type within the collection.

**Collection Material Type Analysis**

This report is available from both the Cataloging and Circulation report menus. For the selected organizations, or for the whole library system, the report shows items grouped by collection, with a breakdown of material types within the collection. For each collection/material type combination, the report displays the number of items of each material type in the collection, as well as the percentage of the total number of items in the system that this collection/material type combination represents. At the bottom of each collection group, the report also shows the total number of items of all material types for each collection, and the percentage of the total number of items that this collection represents.

***Note:*** Only final item records are included in the Collection Material Type Analysis reports. Items without barcodes and on-order items are excluded from the report.

**Collection Value by Organization**

Use this report to list the monetary value of the collections for your organization. Select the organization or organizations for which you want to see the value of each of the collections.

**In-Transit Items** – ***Please do not run this report. It cannot be limited by branch, so it runs across the entire database.***

Item records with a circulation status of In-Transit or Transferred on a date you select. The items are grouped by the “sent from” branch—the branch listed in the In-Transit/Transferred **From** field on the item record workform. This report can help you identify items that were sent to another library but may be delayed or lost in transit.

**Inventory Exception - Incorrect Status**

Lists items that had a status other than In during inventory. You specify a call number range and a cut-off date. Set the cut-off date to the day before the inventory date. You can filter the report by organization.

**Inventory Exception - Misshelved**

Lists items with a status of In that should have been in the inventory sequence but were not. You specify a call number range and a cut-off date. Set the cut-off date to the date you started the inventory. You can filter the report by organization.

**Inventory Shelflist**

Items inventoried using the Update InventoryDate view on the Check In workform. You specify the call number range. Run this report after taking an inventory.

**Item Records by Funding Source and Stat Code**

This report lists items added within a certain time frame grouped by fund and then by statistical code. You select the organization or organizations, the begin date, and the end date. If your library uses Polaris Acquisitions, the fund used to pay for the items appears next to Funding Source. Under the funding source is the statistical code for the items.

**Item Records That Do Not Display In PAC**

Use this report to identify items that do not display in the public access catalog. You can select the organizations, collections, and material types for this report.

**Item Records without Barcodes**

Use this report to identify items without barcodes for the selected organizations. You can select the organizations, collections, and material types for this report.

**Item Status**

Use this report to identify the number of items belonging to the selected organizations that have a certain circulation or hold status. The report is not intended to be an inventory of all items on the shelves. The following item statuses are included in this report:

|  |  |
| --- | --- |
| • Bindery• Claim Never Had• Claim Returned• Held• In• In-process• In-repair• In-transit | • Lost• Missing• On-order• Out• Returned - ILL• Transferred• Unavailable• Withdrawn |

**Lost and Missing Items**

Use this report to list all items with a status of **Lost** and all items with a status of **Missing** for the selected organizations. The lost and missing items are listed by assigned branch and the details include the call number, barcode, title, patron’s name and phone number, and the last transaction date.

**Polaris Circulation Reports**

Circulation reports help you track circulation, overdue items, overdue patrons, and delinquent patrons. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation** in the Polaris Reports window.

**Circulation by Collection Material Type Analysis**

This report shows a count of circulations by material type within each system-defined collection for a time period you designate. It gathers statistics from the transaction file and will include circulated items that have since been deleted. The report counts checkouts and renewals as separate transactions; if an item is checked out multiple times, each checkout is counted. The report also displays the percentage of total items that each collection/material type combination represents. You can filter the report by one or more branches. The branches included are the circulated items’ assigned branches.

***Note:*** The Cataloging Item report Collection Material Type Analysis provides the collection/material type information without circulation statistics. The Cataloging Item report Collection Disposition by Material Type shows the number and percentage of items currently on the shelf (or otherwise considered available), items out (unavailable but accounted for), or not accounted for (lost, missing).

**Circulation by Item’s Assigned Branch**

For a specified date range, reports the number of items from the reporting (item) branch that have been checked out and renewed at other branches, as well as the reporting branch. You can see how many items have been shipped from the reporting branch to each loaning branch, and the total circulation for the reporting branch’s items. The report is sorted by organization, loaning branch, and item material type. You can filter this report by organization (item’s assigned branch).

**Circulation by Item’s Loaning Branch**

For a specified date range, reports the number of items from all the branches that have been checked out and renewed at the reporting (loaning) branch. The report also includes total items and total transactions. The report is sorted by organization, item’s assigned branch, and item material type. You can filter this report by organization (loaning branch).

**Circulation by Postal Code Location**

For a specified date range and organization, reports checkout transactions by postal code. The results are grouped by branch then country type (USA, Canada, Non-USA/Non-Canada, and No Postal Code). Details include the Postal Code, City, State, Number of Checkouts, Unique Patrons, and Unique Items followed by Totals and Grand Totals.

**Circulation by Workstation**

For a specified date range, reports the number of items that have been checked out and renewed at specified workstations. The report is sorted by organization, workstation, and item statistical class (item stat code), and includes totals by item stat code, totals for each workstation, and totals for each organization. You can filter this report by organization (workstation’s parent branch). The branch responsible for the checkout is the branch associated with a renewal. The report separates renewals done from PAC and lists them under System.

***Note:*** The report is based on workstation ID, so if a workstation is reassigned to a new organization the report will include transactions for both the old and new locations. This may also happen if a “floating” staff member at the workstation logs on to one branch, does transactions, then logs on to a different branch from the same workstation.

**Delinquent Patrons**

Identifies patrons (name, phone, barcode) who have system blocks, free-text blocks, or library-defined blocks on their records. You can filter this report by organization (patron’s registered branch).

**Expired Reserve Items**

Identifies items with a status of On Reserve, but for which the reserve period has expired. You may find this report especially useful at the end of an academic term. After you run the report, you can take the reported items off reserve, pull them from the shelves, and return them to the regular collection or otherwise dispose of them. You can filter this report by organization, and sort it by call number, title, and course name.

**Fiscal Year Turnover Rate**

This report offers similar information to the Turnover Rate report, but you can specify a fiscal year and that year’s starting month. The report then compares that year’s turnover rate information with the current year’s statistics.

***Important:*** Because this report gathers up to two years of data, it may take several minutes to complete.

**Floating Items by Home Branch**

A statistical report that counts how many items from the home branch have floated to other branches. You can select one or more home branches and set a date range. The report includes the following information:

* **Home branch**
* **Date range**
* **Collection** - Listed if an item from that collection has floated; includes the total number of items from that collection that have floated.
* **Material type** - Listed if an item of that material type has floated; includes the number of items of that material type that have floated.
* **Float to branches** - Lists each branch that items have floated to and the number of unique items that have floated to that branch. (The same item may float to a branch more than one time; the report counts an item only once.) If the same item floats to more than one branch, it is counted once for each branch.
* **Total number of items that have floated** - Unique items only. The same item may float to different branches or float and return. It is counted only once.\

**Floating Items by Assigned Branch**

A statistical report that counts how many items from other branches have been checked into the receiving branch. You can select one or more receiving branches and set a date range. The printed report includes the following information:

* **Receiving branch**
* **Date range**
* **Collection** - Listed if an item has been received into that collection; includes the total number of items that have been received into the collection.
* **Material type** - Listed for any floating items that have been received; includes the number of items of that material type that have been received.
* **Previous branch** (the last assigned branch of an item) - Lists each branch and the number of items received from that branch.
* **Home branch** - Lists each home branch and the number of items received from that branch.
* **Total number of items received** - The number of unique items. If a particular item floated out to another branch and then floated back at a later time, the item is counted only once.

**Floating Items Setup**

A summary report for the home branch showing the branch’s floating settings. You can select one or more branches. If a branch has not enabled floating collections but has defined values, the report prints the values. If a branch has not enabled floating collections and has not defined any values (collections, material types and so forth) the report is blank. This report includes the following information for each selected home branch:

* All collections selected for floating
* All material types selected for floating
* All branches selected for receiving
* On-shelf item limit for receiving branches
* Total item limit for receiving branches
* No matching collection allowed (yes/no)
* Blank collection allowed (yes/no)
* Floating enabled (yes/no)

**Hourly Circulation Report**

Counts in-library check-out and renewal transactions for a selected date range by day of the week and by hour. (Renewals from Polaris PowerPAC and Mobile PAC are not included.) You select one, several, or all branches in the system and specify a date range. The report will include transactions from the beginning of the first day through and including the end of the final day. The report is divided into sections by selected branch, and sorted within each branch section by day, then by hour; a grand total for all selected branches is included. Report output columns include:

* **Day of week and hour of day** - The report breaks out each hour of the day in which transactions occurred starting from 12:00 a.m. It repeats each day with an hourly unit during which transactions occurred. The report lists only the hours with transactions. If no circulation transactions occurred for an hourly period, that period does not appear in the report; if no circulation transactions occurred for an entire day, that day is listed in a single line with 0 total check-outs.
* **Total circulation** - Total transactions for each branch.

**In-House Use**

Reports the number of items used in a specified organization, sorted by material type. These counts are taken from the Year-to-date in-house usage counter and Lifetime in-house usage counter in the item records. The Year-to-date counter is a count of everything checked in, through InHouse mode, since the last time the site did an item record fiscal year-end rollover. The Lifetime counter is a continuous counter. Both counters follow the site’s year-end rollover schedule.

**Item Circulation by Collection**

For a specified date range, reports the number of items by collection that have been circulated, the number of check-out transactions, and the number of renewal transactions. The report is sorted by organization (item’s assigned branch) and collection. You can filter this report by organization.

***Note:*** This report includes on-the-fly and QuickCirc items. A similar report, constructed in Polaris SimplyReports, also includes these ephemeral items in the count but does not assign them a collection code.

**Item Circulation by Item Statistical Code**

For a specified date range, reports the number of items by statistical code that have been circulated, the number of check-out transactions, and the number of renewal transactions. Check-out transactions include those made in the staff client, offline/bookmobile, Polaris ExpressCheck, and SIP self-check. Renewals include these sources as well as renewals from PAC. The report is sorted by organization and statistical code. You can filter this report by organization.

**Item Circulation Statistics**

For a specified date range, reports the number of items by material type that have been circulated, the number of check-out transactions, and the number of renewal transactions. The report is sorted by organization and material type. You can filter this report by organization.

**Long Overdue Items**

Lists items that are currently long overdue; includes assigned branch, call number, title, item barcode, check-out date, due date, date of last notice, patron, and patron barcode for each item. The report is sorted by organization and call number. You can filter this report by organization.

**Overdue Items**

Lists items that are currently overdue and long overdue; includes assigned branch, call number, title (with issue designation for serials), item barcode, due date, patron and patron’s branch, and patron’s telephone number for each item. This report helps you confirm that the reported items are not on the shelf before sending overdue notices. The report is sorted by organization and call number. You can filter this report by organization. **Note:**  The Overdue Items report identifies patrons from other libraries who have overdue items.

**Overdue Patrons**

Identifies patrons *from the reporting library* who currently have overdue or long overdue items, including detailed information about the patron and the items. The report is sorted by organization and patron name. You can filter this report by organization.

**Overdue Reserve Items**

Lists reserve items with a status of On Reserve or Permanent Reserve that are checked out and overdue. You can use this report to contact patrons with overdue reserve items. It includes the title, material type and barcode, due date, course, and the borrowing patron’s telephone number and registered branch. You can filter the report by reserve item branch, and sort it by branch, call number, course name, due date, or title.

**Patron Circulation Statistics**

For a specified date range, reports the number of circulation transactions (check-outs and renewals), according to patron code. This report measures circulation activity, *not* the number of items circulated. The report is sorted by branch name, in alphabetical order. You can filter this report by organization.

**Patron Code Statistics**

For a specified date range, reports the number of patrons that have done check-outs and renewals, according to patron code and statistical class code. The report is sorted by organization, patron code, and statistical class. You can filter this report by organization.

**Patron Cross Borrowing**

For a specified date range, reports the number of borrowers by patron code who were registered at a library other than the transacting library; includes the number of circulation transactions (check-outs and renewals) done by each patron. The report is sorted by organization (transacting library), patron library, and the number of circulation transactions (highest to lowest). You can filter the report by organization (transacting library).

**Patron Lost Items by Owning Branch**

Lists lost items assigned to a specific branch, broken down by the registered branches of the patrons who lost the items. You can set a date range and filter the report by organization. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation** in the Polaris Reports dialog box.

**Receipt Delivery Failure**

Lists the patron barcode, patron name, carrier name, delivery address, subject, and failure date for receipts that failed to be delivered to patrons.

**Remove Patron ID Report**

When you enable patron ID purging, you can run a report to track the number of patron IDs purged during a time period you specify. Select **Utilities, Reports and Notices** from the Polaris Shortcut bar, select **Circulation** in the Polaris Reports dialog box, and double-click **Remove Patron ID from circ transactions process log**. You set transaction start and end date parameters for this report. The report includes Organization (transacting organization), Transaction Start Date (starting date of the purged transactions), Transaction End Date (ending date of the purged transactions), a count of the patron IDs removed from transactions for the specified period, a count of the patron IDs removed from item record histories for the specified period, and total IDs removed. (If the same patron ID occurs more than once in an item record history, each occurrence is counted.)

**Reserve Item Records**

Lists all reserve item records by assigned branch, regardless of the reserve status; includes call number, barcode, title, material type, course information, reserve start/end date, and reserve status. You can filter this report by organization, and sort it by reserve status, title, call number, and course name.

**Reserve Shelf List**

Lists reserve items currently on reserve (status of On Reserve or Permanent Reserve). You can use this report as a shelf list to check all items that should be currently reserved at the library. The report includes the circulation status of each item, as well as other item and course information. You can filter this report by organization, and sort it by call number, title, and course name. If an item is on reserve for more than one course, the report lists the item more than once.

**Reserve Statistics by Course**

Lists reserve items currently on reserve (status of On Reserve or Permanent Reserve) for a course with a status of Active, and the number of times each item has been checked out. For example, this report is useful if an instructor asks whether items on reserve for a particular course are circulating. You run the report for a selected course/section number or multiple course/section numbers at a particular branch. Items that circulate while on reserve also increment the year-to-date circulation counter in the primary item record. Reserve circulations are included in the standard circulation statistical reports.

***Note:*** The turnover rate is the number of items circulated divided by the total number of items owned. Two reports calculate turnover rate by collection or item statistical code, for a selected branch or multiple branches.

**Top Circulating Titles by Collection**

Lists the top circulated titles, organized by selected branch and collection, for a specified date range. You select one, several, or all branches in the system and specify a date range, collection, and number of titles to show. The branches are items’ assigned branches. The report will count check-out and renewal transactions for the date range from the beginning of the first day through and including the end of the final day. The report is divided into sections by items’ assigned branch, and sorted within each branch section by collection name and then by titles according to circulation count (high to low). The columns include the following information:

* **Collection**
* **Titles within collection**
* **Count of circulations for each title** - Each checkout and each renewal is counted for each title regardless of check-out branch or patron’s branch. The titles with the highest circulation numbers appear in the report. If there are fewer than the specified number of circulated titles in a collection, the reports lists all the titles that have circulation counts. If some titles have the same count, the report lists each, up to the specified number of titles. If a collection has no circulating titles, it is not listed in the report.

**Turnover Rate**

This report counts all item check-out and renewals where the item’s assigned branch matches a selected branch or branches and the transaction date is within the selected date range. You specify whether to report by collection (the default) or by item statistical code. For each selected branch, the report lists each collection or item statistical code that has had circulation, the total items in the collection or statistical code, the number of circulations for each collection or statistical code, and the corresponding turnover rate (circulated items/total items) expressed as a decimal figure, and the totals of these figures for each branch. If the report includes more than one branch, combined totals for the selected branches are also included.

**Notes:**

* The item count is based on the number of items in the assigned branch’s holdings on the date the report is run.
* Check-out and renewal transactions are counted without regard to the transacting patron. That is, if the same patron checks out the same item 12 times, 12 transactions are counted.
* The patron’s registered branch is not considered in any way.
* If an item is put in transit to fill a hold at another branch and is checked out from that branch, the transaction is counted.

**Uncirculated Items**

Identifies items with little or no circulation since their creation date, to help you remove them from the collection. You specify the item record creation date and circulation thresholds. The report lists all items created before the specified date with a record status of Final that have the specified number or fewer circulations. The default number is 0; that is, no circulations.

**Polaris Public Services Reports**

The following reports can help you gather statistics about the patrons registered in your system and at specific branches.

**Patron Services Reports**

To access these reports, select Utilities, Reports and Notices from the Polaris Shortcut bar, and select Public Services, Patron Services

**Associated Patron Groups Report**

Lists all patron records that are linked in associations (whether or not these are blocking relationships). You can select one, many, or all patron registration branches. The report lists all patron records from the selected branches that have one or more associated patron records, and lists the associated records for each patron. Each patron’s full name, patron code, and barcode is included. Patrons are listed in alphabetic order by last name.

**Expired Patrons**

Lists information about patrons whose registration has expired before a specified date. The report is sorted by organization and expiration date. You can filter this report by organization.

**Inactive Patrons**

Lists information about patrons registered during a specified date range whose accounts show no activity since the end date of the range. The report includes the patron’s last activity date. The report is sorted by organization, last activity date, and patron name. You can filter this report by organization. The Last Activity Date field in the patron record is updated in these circumstances:

* **Staff client** - Item check-out; renewal; quick-circ item check-out; when a claim is made on an item
* **PAC** - Log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in
* **Polaris ExpressCheck, SIP self-check units** - Check-out and renewal; patron account access; payments
* **Time and print management applications** - Log-in
* **Inbound telephony** - Account information access; item renewal

**Patron Register**

Reports the total number of patrons, by patron codes, who were registered during a specified time period. The report is sorted by organization and patron code. You can filter this report by organization.

**Patrons Registered by Zip Code**

Reports the total number of patrons who were registered, according to postal code, during a specified time period. The report is sorted by organization and Zip code. You can filter this report by organization.

**Patrons without Addresses**

Identifies and lists information about patrons registered before a specified date whose accounts do not include an address. The report is sorted by organization and patron name. You can filter this report by organization.

**Patrons with Messages Report**

This report provides a snapshot of read and unread messages currently in patron accounts where the patron’s registered branch matches the selected branch or branches and where the patron record has at least one message, read or unread. The report includes patron names, message text, whether the message is read, the date the message was created, and the creator.

**Verify Patron Data**

Lists patrons who are currently blocked because they have self-registered or they have made account changes through the PAC. The report is sorted by organization and patron name. You can filter this report by organization.

**Statistical Summary**

To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System**.

**Patron Financial Reports**

To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box. The following reports can assist you in processing and evaluating patron financial transactions:

**Billed Patrons**

Identifies patrons who have received a billing notice. The report includes basic item information and the amount owed by each patron, sorted by organization name and patron name. You can filter the report by organization.

**Collection Agency Detail**

Reports all patron accounts submitted to collection that show account activity within a specified date range. It shows who has been reported during that time period, even though a patron’s standing with regard to the collection agency may have changed after that time period. You can also run it for a time period ending at the current date to get a picture of any patron’s current standing with regard to the collection agency. The report lists details of the account activity for each patron, grouped by organization. Organizations and amounts are based on the library’s settings for reporting level (system, library, or branch) and reporting branch (item’s branch, patron’s branch, or loaning branch) set in Polaris Administration.

***Examples:*** Reporting level is Branch - Patrons with activity based on reporting branch (by patron’s branch, item’s branch, or loaning branch). That is, if the reporting branch is loaning branch, then a report for the branch will include all patrons reported because they checked the item out at the branch.

Reporting level is **Library** - Patrons who have had activity based on reporting branch (by patron’s branch, item’s branch, or loaning branch). That is, if the reporting branch is loaning branch, then a report for Library will include all patrons reported on behalf of the Library's associated branches because they checked the items out at those branches.

Reporting level is **System** - Patrons with activity during the specified period, regardless of how they were reported (by patron’s branch, item’s branch, or loaning branch).

**Collection Agency Summary**

Identifies all patrons who have been reported to a collection agency and the amounts they owe, grouped by organization.

**Daily Cash Drawer**

Reports the financial transactions completed on a workstation, including the time of each transaction and the operator. The report includes totals for each type of transaction (Payment, Charge, and Waive), totals for all cash taken in and paid out, and the net balance for the specified time period. You may want to coordinate this report with the times that various staff members use a particular workstation for patron accounting transactions.

**Donations - Credit Card Payments**

For a specified date range, reports donation payments, including details such as the amount, the purpose, whether the donor wants a printed acknowledgement and if so, the donor’s address. The report includes subtotals by organization (the branch the donor has designated to receive the gift). You can filter this report by receiving organization.

***Note:*** Printed acknowledgements are not automatically generated. Using the information on the report, you can create and send your own acknowledgements to the appropriate donors.

**Financial Transaction Summary by Fee Reason**

Reports patron financial transactions, organized by transaction (fee) reason, for a selected transaction date range. You can select one, many, or all branches (transacting organizations). If the transaction is a payment, waive, or refund, the transaction is included even if the initial charge was prior to the date range. You can also choose to include or exclude credit card transactions. The detail section of the report lists transactions grouped by transaction reason (such as overdue item) and the total payments for that reason. Transaction details include the date, amount, payment method, operator, and patron barcode, and are sorted by transaction date/time. The summary section of the report lists the totals for all branches included in the report, with the total amounts for each transaction reason. A separate summary reports the total of all debit transactions. These include refunds from payments, refunds from deposits, and credits from deposits. (Individual debit transactions are not included in the report detail.) A separate summary for waive transactions is also included. The following patron financial transactions are included:

* **Charges** - A charge may be created manually by staff, created automatically by a process such as an overdue or hold request, or created by a third-party device.
* **Payments** - A payment may be made by staff in the staff client, by the patron from PAC, or via a third-party device.
* **Waives** - Waives may be created manually, or automatically when a lost item is returned. A total of all waives is included in a separate summary at the end of the report, but individual waive transactions are not included in the detail section of the report.
* **Refunds** - Cash or check refunds. These are summarized at the end of the report but are not included in the detail section of the report.
* **Credits** - Amounts are credited to a patron account under certain circumstances, such as when a lost and paid for item is recovered. Staff members with appropriate permission can manually create a credit.

***Note:*** Deposits and deposit returns are not included in the reported patron financial transactions.

**Financial Transaction Summary by Payment Type**

This report is similar to the Financial Transaction Summary by Fee Reason report, but lists only payment transactions. All payment methods are included. The detail section of the report lists the transaction date, transaction reason, item barcode and title if applicable, operator, workstation, patron barcode, and amount. This section is grouped by payment method and sorted by transaction date/time. The summary section of the report includes the total for each payment method, the total for all payment methods per branch, and grand totals for all selected branches.

**Fines and Fees**

Lists fines and fees transactions according to transaction type (such as payments, waives, refunds, and charges), during a specified time period. The report provides detailed information on each transaction, including the transaction date, reason, and amount; the item barcode and title; the computer workstation and operator; the patron barcode; and totals for each transaction type and library. Charges are listed on the report according to the governing library for fine calculation. Payments, credits, and waives are listed according to the library where the transaction took place. You can filter this report by organization, including the system organization. If you prefer a summary, run the Fines and Fees Summary report.

**Fines and Fees - Credit Card Payments**

For a specified date range, reports payments for charges, including details such as each patron’s total payment credit transaction ID, as well as individual charges, the items associated with charges, and the patron barcode. Declined transactions are also listed. The report includes subtotals by organization (the organization associated with individual charges on the patron’s account). You can filter this report by organization.

**Fines and Fees Summary**

For a specified date range, reports the total amounts for fines and fees transactions (for example, payments, waives, refunds, and charges), according to transaction type. You can filter this report by organization, including the system organization.

**Fines by Amount**

This report provides basic information about patrons with account charges in a specified range of amounts. You select one, several, or all branches in the system and specify a fine amount range. The branches are patrons’ branches; for the fine amount range, valid **From** and **To** values are $0.00 up to $9,999,999.99. The **To** value must be greater than the **From** value. (The amount includes all charges, not just fines.) The report lists all patrons by selected registered branch that have any outstanding unpaid charges within the specified fine range. The report is divided into sections by registered branch. Within each branch section, the report is sorted by patron last name and amount. Totals of all amounts owed for each branch are included, as well as the grand total of amounts owed for all selected branches. Includes the following information for each patron:

* **Patron barcode**
* **Patron name** - Last, First Middle, Suffix
* **Patron code**
* **E-mail address**
* **Postal address**
* **Phone** - Lists all phone numbers and carriers, if appropriate
* **Charges** - The total amount of charges owed.

**Waived Fines**

Reports all waived fines during a specified period, including the staff member and computer workstation responsible for each waive transaction. The report groups the auto-waived fines (fines that are automatically waived at check-in, if any) and regularly waived fines (fines manually waived by staff members). It also includes an auto-waive total, waive total, and grand total for each patron, as well as a total for each organization. The report is sorted by organization, patron name, and transaction type (auto-waive and waive). You can filter this report by organization.

**Active Network POS Reports**

These reports help you reconcile Class POS transactions in Polaris. On the Polaris Shortcut Bar, select **Utilities, Reports and Notices, Public Services, Patron Financial**, **Active Network POS**.

**Daily Cash Balance Detail**

For Class POS customers. Reports payments by payment type per the POS detail during a specified date range. The report includes only those POS payments taken in Polaris.

**Daily Cash Drawer** **POS**

For Class POS customers. A copy of the Daily Cash Drawer report that includes the POS Transaction ID for payment transactions.

**Non POS Payments**

For Class POS customers. For a specified date range, this report lists all payments made in Polaris that did not go through the POS system.

**Sales Summary Report**

For Class POS customers. This report is comparable to a similar CLASS report that summarizes all payments, refunds, and adjustments by reason for a specified date range. You can select organization (including the system organization), workstation, and user parameters.

**PayPal Credit Card Reports**

If you use PayPal, two reports help you track credit card payments to the library. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box.

**Donations - Credit Card Payments**

Lists donation payments, including details such as the amount, the purpose, whether the donor wants a printed acknowledgement and, if so, the donor’s address; includes credits and voided transactions. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the branch the donor has designated to receive the gift. Use this report to distribute donations to the appropriate organizations. Run the report at the system level to view voided transactions.

***Note:*** Printed acknowledgements are not automatically generated. Using the information on the report, you can create and send your own acknowledgements.

**Fines and Fees - Credit Card Payments**

Lists payments for charges, including details such as each patron’s total payment credit transaction ID, as well as individual charges and processing fees, the items associated with charges, and the patron barcode. Declined transactions, credits, and voided transactions are also listed. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the organization associated with individual charges on the patron’s account.

**Class POS Transactions**

These reports help you reconcile Class POS transactions in Polaris. On the Polaris Shortcut Bar, select **Utilities, Reports and Notices, Public Services, Patron Financial**.

**Daily Cash Drawer** **POS**

A copy of the Daily Cash Drawer report that includes the POS Transaction ID for cash and check payment transactions.

**Daily Cash Balance Detail**

Reports payments by payment type per the POS detail during a specified date range. The report includes only those POS payments taken in Polaris.

**Non POS Payments**

For a specified date range, this report lists all payments made in Polaris that did not go through the POS system.

**Sales Summary Report**

Comparable to a CLASS report that summarizes payments, refunds, and adjustments by reason for a specified date range. You can select organization, workstation, and user parameters.

**Polaris Outreach Services Reports**

The following reports can help you organize and track outreach services processing. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Outreach Services** in the Polaris Reports dialog box.

**Pick List Reports**

**Outreach Services Pick List by Date of Next Service**

After you generate pick lists for your outreach services patrons, this report lists detailed item information for each patron due for outreach services deliveries within a specified time period. You can filter the report by patron’s branch and date range, and sort it by a number of fields, such as title, call number, patron name, delivery mode and route.

**Outreach Services Pick List by Delivery Option**

This report lists detailed item information for each patron due for outreach services deliveries by a specified delivery option. You can filter the report by patron’s branch and delivery option, and sort it by a number of fields.

**Outreach Services Pick List by Route**

This report lists detailed item information for each patron due for outreach services deliveries on a specified delivery route. You can filter the report by patron’s branch and delivery route, and sort it by a number of fields.

**Usage Reports**

**All ORS Patrons**

This report lists all enabled ORS patrons (active and inactive), grouped by branch. It includes the patron’s name, ORS status, notes, last service date, next delivery date, route, and mode of delivery. You can filter the report by patron’s branch.

**Item Circulation Statistics for ORS**

This report shows the number of items checked out to ORS patrons within a specified time period. Items are grouped by material type and organization. The report includes the number of items by material type, checkouts, renewals, and total transactions. You can filter the report by branch.

**Patron Circulation Statistics for ORS**

This report lists the number of items checked out and renewed to ORS patrons, grouped by patron code, within a specified time period. You can filter the report by branch.

**Reader Ratings Reports**

***Note:*** Rating average calculations do not include titles with a rating of 0.

**ORS Rated titles**

This report includes titles where the title appears on a reading history linked to an ORS patron, the patron’s registered branch is a selected branch, the title has an average rating that matches the selected ratings, and at least one item attached to the title appears in the selected patron reading histories and has a rating date within the selected range. You can filter the report by branches, ratings, and rating date range, and opt to combine branch totals or report each branch separately. The report lists title, author, format (bibliographic format), patrons (the number of patron records where the title appears), number of ratings, average rating, total number of items for the branch, total number of patrons for the branch, and grand totals for items and patrons when multiple branches are selected.

***Note:*** You can sort this report by author, format, number of ratings, or title. You must select a sort option to run the report.

**ORS Rated titles by patron**

This report includes all titles where the patron is an ORS patron, the patron’s registered branch is a selected branch, the title has an average rating that matches the selected ratings, and at least one item attached to the title appears in the selected patron reading histories and has a rating date within the selected range. You can filter the report by branches, ratings, and rating date range. The report lists patron name, titles grouped alphabetically by rating, author, format, number of ratings, and average rating.

***Note:*** You can sort this report by format, patron name, or title. You must select a sort option to run the report.

**ORS titles not rated**

This report shows the number of titles with no rating checked out to ORS patrons for a specified date range. You can filter the report by patron’s registered branch, and sort it by author, format, title, or total check-outs.

***Note:*** You must select a sort option to run the report.

**Polaris Serials Reports**

To access Serials reports, select **Utilities** from the Polaris Shortcut Bar, and select **Reports and Notices, Serials**.

***Tip:*** There may be other unreceived issues or parts with a status of Never Published or Not Available. You can search for the issues or parts using the Find Tool, select **Status** in the **Limit by** box, and select the statuses.

**Issues or Parts not Received**

Lists the issues or parts that were not received as expected. Only the issues with a status of Expected, Pending Claim or Claimed are listed in this report.

**List of Subscriptions by Publisher**

Lists the subscriptions your library is receiving, according to the publisher in the linked bibliographic record’s 260 tag, $b. To generate the report, you specify a subscription record status (open, canceled, or all), an expiration date or date range, and the publisher’s name.

**List of Subscriptions by Subject**

Lists the subscriptions your library is receiving, according to the subject in the linked bibliographic record’s 6XX tag. To generate the report, you specify a subscription record status (open, canceled, or both), an expiration date or date range, and the subject. You can include multiple subjects separated by **#**.

**List of Subscriptions by Supplier**

Lists the subscriptions your library is receiving, according to the supplier linked to the subscription record. To generate the report, you specify a subscription record status (open, canceled, or both), an expiration date or date range, and the supplier’s name. You can select multiple suppliers.

**Monthly Checkin Statistics**

The number of issues a library has received during a specified time period.

**Renewal Reminder**

Identifies the subscriptions due to be renewed within a specified time period. You can compare this report with the paper renewal list that the supplier sends to confirm that the library and the supplier have the same information about the subscriptions. Select one or more organizations (or select All), select the subscription start date and expiration date range, and the supplier or suppliers. The report lists the titles (grouped by organization and supplier) that are up for renewal. It also shows the total cost for each subscription and the total cost by supplier.

**Serial Holdings Records by Branch**

Lists the serial holdings records for a specific branch.

**Subscription Cost Analysis**

Provides a graphical representation of a subscription’s cost for the years that your library has tracked the cost in Polaris. You can set the report to show a single subscription or multiple subscriptions.You can also print the report from the Subscription Record workform (**File, Print, Subscription Cost Analysis**) to report on that specific subscription record.

**Subscription Expenditure Prediction**

Projects a library’s expenditures, based on a specified percentage increase. The report applies only to subscriptions with a status of open.You can also print the report for a specific subscription from the Subscription Record workform (**File, Print, Subscription Expenditure Prediction**).

**Titles Not Automatically Renewed**

Identifies subscriptions that were not automatically renewed, so they can be renewed manually. Select one or more organizations and one or more suppliers. The report lists the subscriptions by supplier, the status of the subscription, the fund that was used to pay for the subscription, the price, and the number of active and fulfilled.

**Polaris Holds Processing Reports**

Reports related to holds are part of the regular holds processing workflow. They identify a branch’s hold requests to fill, requests awaiting pickup, unclaimed requests, titles that have a high volume of holds, expired requests, and other useful information. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation, Holds** in the Polaris Reports dialog box.

**Expired Requests**

Lists expired requests with item and patron information. You can filter this report by organization.

**Held Checklist**

Lists the held items that are awaiting pickup by patrons; includes item and patron information, sorted by organization and call number. You may find it useful to run this report daily. You can filter this report by organization.

**Holds alert reports**

These reports list titles where the number of Active and Pending requests is equal to or greater than a selected number of requests, and count the number of items linked to those titles that might fill the requests. The linked items count includes items with a Final record status, and any circulation status except Claim Never Had, Claim Returned, Lost, Missing, Withdrawn, or Unavailable. You can select a pickup branch or branches to filter the **Holds alert report by branch**. You can select a library or libraries to filter the **Holds alert report by library**; in this case, the report includes requests where the pickup branch belongs to one of the selected libraries. Report output columns include the bib record ID, title, author, type of material (format), ISBN, local holds count, local items count, system holds count, and system items count.

***Note:*** These reports are based on current holds data (all current Active and Pending requests), not transaction data. They do not report the number of requests that have been placed in the past, only the requests that are in the system when the reports are run.

**Holds Purchase Alert**

Lists bibliographic records with hold requests on them, the number of requests, and the number of items that can fill the request. This report provides the library with an indication of which titles are most frequently requested and have too few items to meet the demand, and is useful for making purchasing decisions. Using the report parameters, you can do the following:

* Set the levels for the number of holds on a bibliographic record and the number of items attached to a bibliographic record in the report. The report returns results based on the ratio of number of holds to number of items.
* Include or exclude items that are not holdable (Lost, Missing, Withdrawn, Unavailable and non-holdable) by selecting **Yes** or **No** next to **Include non-holdable items**. The default is **No** - no non-holdable items will be included.
* Filter the report by TOM by selecting one or multiple TOM filters. When TOM filters have been applied, only bibliographic records with the selected primary TOMs are included. For example, if you want to see Blu ray discs for which there are at least 10 holds and only 1 item, enter **10** in the **Number of Holds** box and **1** in the **Number of Items** box, and select **Blu ray Disc** in the **Type of Material** box.
* Group the report by TOM, or leave it ungrouped.

***Note:*** The report includes the UPC code (if any) for bibliographic records with no ISBN to help you track non-print records.

**Hold Requests To Fill**

The RTF report, an essential part of the daily holds routing process. This report identifies pending hold requests currently in the request routing sequence. You can sort the report by call number, collection, format, and title, and filter it by organization. You use this report to view items at your library with a status of In that could fill the requests. For each request, check in and send the item to the pick-up branch, or deny the request.

***Note:*** You can also print the Hold Requests To Fill report from the Request Manager workform (**File, Print Hold to Fill**). However, you cannot sort information.

**Holds Fiscal Year Analysis**

Shows the system-wide number of patron-placed hold requests per month, staff-placed hold requests per month, total hold requests for the year to date, and total hold requests filled, beginning with today’s date and going back to the month you specify. The report also includes the percentage of increase or decrease for each category compared to the same month in the previous year, and shows the grand totals for successive past years as available data permits. The report gathers the data from the holds transaction files. For reporting purposes, hold requests “placed” includes all requests that acquired a status of Inactive, Active, or Pending. Reactivated requests are not counted.

**Local Hold Request and Item Counts by Branch**

Lists Active and Pending requests for each branch where the branch is the pick-up library. The **Number of Local Holds** column shows the requests. The **Number of Local Copies** column shows the number of items owned by the branch, including items with a status of In, Out, Held, Transferred, In Transit, On Order, In Repair, and In Process. Items designated as Not Holdable are also included in the count. This column lists **0** for a title if the pickup branch does not own any eligible items, or if the title does not have any linked items. You can filter this report by organization.

**Pending Holds Count**

Counts pending requests per day for a selected pick-up branch or branches, and can help you gauge the amount of staff time spent on finding and pulling items that fill requests. You specify a date range and select an organization or organizations (the pick-up branches for the hold requests). The report lists all the holds requests that changed to a status of Pending during the selected date range for the selected pick-up libraries. If the same request went Pending more than once during the specified time period, it is counted only once. The report is organized by branch and lists one line per day during the time period with the total number of pending requests for that day. If the count for a day is 0, that day is not listed. For example, a selected date range of 30 days could include up to 30 lines for a branch, with a count of requests for each day. The reports also includes the total number of requests for each selected branch and the grand total for all selected branches.

**Request Time to Fill**

Shows how many days it took to fill hold requests during a specified time period, from the date the request was placed to the date the item was placed on the hold shelf. The report is organized in 10-day increment columns. That is, you see how many requests were filled in 10 days or less, how many were filled in 11-20 days, and so forth. A percentage of the total requests filled is also provided for each 10-day increment, as well as an overall average days-to-fill figure. (Note that the percentages for each 10-day column may not total exactly 100% due to rounding.) The report is grouped by pick-up branch, and you can filter the report by pick-up branch.

***Note:*** The report does not include requests that took more than two years to fill.

**Unclaimed Checklist**

Lists unclaimed requests with item and patron information. You can filter this report by organization.

**Statistical Summary**

To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System**.

**Statistical Summary Report**

The Statistical Summary report provides detailed snapshots of the system, including database record counts, records added and deleted within a specified time period, and system activity within a specified time period. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select the **System** folder.

You can filter the report by date and by organization. The report includes the following categories and details, as well as the totals in each category and the grand total in each category for all selected branches (the sum of individual branches).

***Note:*** To produce a report that includes all total counts but does not detail individual branch counts, select (check) Summary only on the Report Setup dialog box.

**Record Counts**

These are total counts, not restricted by date range.

* **Bib records with items** - Bibliographic records with at least one item attached, where the record owner is the reporting branch.
* **Bib records without items** - Bibliographic records with no item records attached, where the record owner is the reporting branch.
* **Authority records** - All authority records with a status of Final. Provisional and deleted records are not counted.
* **Item records** - All item records where the assigned branch is the reporting branch. Does not include provisional or deleted records, or items with a circulation status of Withdrawn.
* **Patrons** - All patron records where the registered branch is the reporting branch.
* **Staff** - All staff member records where the staff member organization is the reporting branch.
* **Workstation** - All workstations where the workstation organization is the reporting branch.

**Circulation Statistics**

These are reported within a specified date range.

* **Check-outs** - All check-out transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch. Includes staff client renewals; PAC renewals; inbound telephony renewals; offline check-out; Polaris ExpressCheck check-out and renewals; Quick-circ check-out; SIP, NCIP or remote, third party check-out.

***Note:*** Renewals from PAC are counted as coming from the loaning branch.

* **Borrowers** - Counts all unique patron IDs in check-out transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch.
* **Check-in** - All check-in transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch. Includes normal mode check-in; bulk mode check-in; offline check-in; in-house circulation; Quick-circ check-in; SIP or remote, third party check-in; any item that is scanned but is already in (in-to-in). Automatic-check-ins (those that occur during check-out or when holds are filled), and inventory check-ins (or Polaris Inventory Manager check-ins) are not counted.
* **Overdue items checked in** - All transactions within the specified date range at all workstations where the workstation logon branch in the transaction is the reporting branch and the transaction indicates the item was overdue. The number of overdue items checked in is included in the count of total check-ins.
* **Holds placed** - Hold statistics are based on the holds transactions. Includes all hold requests where the workstation branch is the reporting branch and the requests have an activation date within the date range. Also includes re-activated requests, requests that have been suspended and re-activated, and requests placed from the PAC. (You can also see a separate count of PAC requests.
* **Holds satisfied** - All hold requests where the workstation branch is the reporting branch, and the requests have had a status of Held or Transferred with a status date within the date range.
* **Holds cancelled** - All hold requests where the workstation branch is the reporting branch, and that have a request status of Cancelled with a status date within the date range. Includes requests cancelled from the PAC.

**Records Added and Deleted**

These counts are based on transaction file data within the specified time period.

* **Bib records added** - All bibliographic records created within the date range where Organization ID is the reporting branch.
* **Authority records added** - All authority records created within the date range where Organization ID is the reporting branch.
* **Item records added** - All item records created within the date range where the assigned branch in the item creation transaction is the reporting branch. Includes records with a status of Active or Provisional, but not those with a status of Deleted.
* **Patron records added** - All patron records created within the date range where the Organization ID is the reporting branch. The Organization ID is the patron’s registered branch. The report counts all patrons registered for the selected branch, regardless of where the registration occurred, and includes PAC self-registrations. (You can also get a separate count of PAC registrations.
* **Bib records deleted** - All bibliographic records deleted within the date range where the Organization ID is the reporting branch.
* **Authority records deleted** - All authority records deleted within the date range where the transaction Organization ID is the reporting branch.
* **Item records deleted** - All item records deleted within the date range where the assigned branch is the reporting branch.
* **Item records withdrawn** - This count is not based on transactions, but on the item status and status dates. Includes all item records where the assigned branch of the item is the reporting branch; the item circulation status is Withdrawn; and the circulation status date falls within the selected date range.
* **Patron records deleted** - All patron records deleted within the date range where the patron’s registered branch is the reporting branch.

**Financial Amounts**

These figures summarize monetary transactions within the specified time period.

* **New charges** - All charges created within the date range where the parent branch of the workstation that created the charge is the reporting branch.
* **Money collected** - All amounts paid within the date range where the parent branch of the workstation that took the payment is the reporting branch. Includes full and partial payments, credit card payments, and payments made from PAC and Polaris ExpressCheck. If the workstation branch cannot be determined, the report credits the amount to the organization responsible for the charge.
* **Refunds** - All amounts refunded (refund transactions) within the date range, where the workstation branch of the transaction is the reporting branch. Includes credit card refunds.
* **Net** - Money Collected minus Refunds.
* **Amounts waived** - The sum of all waived amounts within the date range, where the workstation branch is the reporting branch.
* **Outstanding fines** - The total of all charges where the organization identified in the charge (Patron Status workform - Account view) is the reporting branch. This is not all money owed by all patrons registered at the branch, but all money owed to the branch, regardless of who owes it.

**PAC Statistics**

**Note:** When the Statistical Summary report is run for All organizations, PAC statistics are based on PAC server activity. If the report is filtered by a specific branch, the report counts only in-library use, based on the PAC workstation login branch.

* **Patron logins** - All logins from PAC within the date range where the patron’s registered branch is the reporting branch. The count includes any login; for example, to view the patron account or to place a request.
* **Patron self-registration** - A count of PAC registrations within the date range where the patron’s registered branch is the reporting branch. This number is also included in the total number of registrations reported (see [Records Added and Deleted](#XREF_41394_Records_Added_And) ).
* **Holds placed from PAC** - All hold requests placed within the date range where the pickup branch is the reporting branch. The total is also included in the Holds Placed count in the Circulation Statistics section.
* **Holds cancelled from PAC** - All hold requests cancelled within the date range where the pickup branch is the reporting branch. The total is also included in the Holds Cancelled count in the Circulation Statistics section.

***Note:***  Renewals from PAC are included in the Circulation section. They are counted as coming from the loaning branch.