**Standard Polaris Reports List**

To access Polaris standard reports, select **Utilities** from the Polaris Shortcut Bar. Then select **Reports and Notices** and select the appropriate folder. For more information on generating and printing reports, see Using Polaris Standard Reports.

**Note:**
The organizations that display in the Report Parameters dialog box depend on the setting in the Staff Client profile **Report Server** in Polaris Administration. See Specifying Report Servers.

See the following sections for information on reports by type:

- **Acquisitions Reports**
- **Serials Reports**
- **Cataloging Reports**
- **Public Services Reports**
- **Outreach Services Reports**
- **Circulation Reports**
- **Outbound Telephony Reports and Trouble-Shooting**
- **PAC Reports**
- **System Reports**

**Acquisitions Reports**

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

- **Advanced Shipment Notification Log** - The Advanced Shipment Notification log displays all titles received via ASN for a supplier and line item status date range. To generate the report, enter the **Supplier SAN** (with or without the hyphen), the **Line item status start date**, the **Line item status end date**, and click **Submit**. The line item status date is the date the line item’s status was updated to **Received** (all segments were received via ASN).

  The report lists purchase order line items that have segments received via ASN within the time period (including the start and end dates) for the specified supplier. It includes the following columns of information sorted by purchase order number, then title, then carton tracking number: **PO # / Suffix; Title / Author / ISBN (UPC); Tracking Barcode; POLI ID; Ord** - Total quantity ordered from the purchase order line items; **Sent** - Total quantity shipped by the supplier; **Rec** - Total quantity of all received purchase order line item segments; **ASN Rec** - Total quantity of purchase order line item segments received using the Receive ASN Shipments workform; **Note** - If the shipped quantity was adjusted, a note appears in this column. The report is printed in landscape page orientation.

- **Advanced Shipment Container Content Report** - Lists all items found in a specific package or container for which the supplier has sent an EDI ASN file. Type or scan the 18-digit SSCC tracking barcode in the Report Wizard window. The header shows the date shipped. The report is sorted by title, and it includes the following
information: title; author; ISBN or UPC; purchase order number and suffix; purchase order line item ID; and the total quantity sent.

- **Advanced Shipment Containers Not Yet Received** - Lists all items found in a package/container for which the supplier has produced an ASN, but which has not yet been received through the ASN workform. To generate the report, enter the supplier’s SAN (with or without hyphens) in the Report Wizard dialog box. The report is grouped by tracking barcode, and sorted by title, then purchase order number. It lists the tracking barcode, PO#/Suffix, Title/Author/ISBN (UPC), PO Line ID, Qty Sent, and the Date Shipped.

- **Average Days On Order by Supplier and Material Type** - Shows how long suppliers take to fulfill orders. For each supplier, it shows the material type, the date ordered, the date received, and the destination library.

- **Average Material Cost by Supplier** - Compare suppliers by the type of material purchased. It shows the average price of invoiced items for each supplier, according to material type.

- **Canceled Titles by Supplier** - Each canceled title is listed with its ISBN/ISSN, quantity, amount (price), purchase order number, and line number.

- **Check In Shelf-Ready Materials** - For each branch listed, the report contains the following information:
  
  - **Purchase order line item segment receipt information:** Purchase order number and suffix; Title and author; Purchase order line ID number and Segment ID number; Fund; Quantity ordered/Quantity received
  - **Comments:** If the line item segment was split because fewer copies were received than were ordered, a note appears in this section.
  - **Item check in information:** The date and time that the item was checked in using the Receive Shipment workform; the workstation name where the check in was done; the user name of the staff member doing the check in; item’s barcode, title, author, ISBN/UPC, item ID, assigned branch abbreviation.

- **Claims Ready for Cancellation** - Lists items that should be cancelled because the maximum number of claims have been generated, and the item still has not been received. If your library has chosen to automatically cancel items after the claim cycle, the items will not appear on this report.

- **Currency Exchange Rates** - For each library organization selected, the report shows the foreign currency, the exchange rate, the last modified date, and the user who last modified the exchange rate for that organization and foreign currency.

  **Note:** For information on updating the currency exchange rate, see [Update the currency exchange rate for a foreign currency](#).

- **Electronic Invoice** - Specify the date range and the supplier SAN to see the EDI invoices. For each invoice, the report lists the invoice date, the invoice number, the purchase order number, the currency (if a currency other than the base currency was used), the date shipped, and the library account’s SAN ID. Under the invoice information are the details for each purchase order line item, including the purchase order line ID, the ISBN, the title, the quantity, the discount and retail prices, the line item’s purchase order number, and the discount percentage.

- **Electronic PO Acknowledgment** - An electronic purchase order acknowledgment (POA) is the supplier’s response to an electronic purchase order that the library sent. A Polaris utility scans the supplier’s FTP server for acknowledgments and invoices. If a purchase order has been sent and an acknowledgment is on the supplier’s server, the utility downloads the file to the C:\Polaris Reports\EDINew directory (or another directory your library has specified to store these files). The information in the downloaded file is used to create this report.
Use this report to identify the status of titles electronically transmitted in a purchase order. The acknowledgment status codes in the report vary according to supplier. You can also refer to the report to manually adjust a purchase order in Polaris to reflect the current status of on-order titles. The report includes information regarding the sender, receiver, and titles ordered.

To run the report, select a branch (or select All) from the Organization list, enter the start date, end date, and the supplier’s SAN without a hyphen. The supplier’s SAN is in the Supplier record.

- **Encumbrances and Expenditures by Supplier** - Use this report to inform materials suppliers of how much money has been spent (expenditures) and how much money the library plans to spend (encumbrances) for a fiscal year. The report lists suppliers by SAN, and suppliers that share the same SAN are grouped together and listed in alphabetical order. If no SAN is found in the supplier record, the supplier displays individually on the report. The encumbrances and expenditures amounts are sub-totalled for each supplier account, and then totalled for the supplier group.

  **Note:**
  
  If your library supports more than one fiscal year hierarchy for the same collection, the report should be run for each fiscal year hierarchy.

Suppliers are listed on the report if they are linked to:

- Purchase order line items for which amounts have been encumbered in funds linked to the selected fiscal year.
- Invoice line items for which amounts have been expended from funds linked to the selected fiscal year.

To run the report, select a single branch or all branches (you cannot select multiple branches) under Parameters. The fiscal year records for the selected branch (or all branches) are listed. Then, select a fiscal year from the list, and click **Submit**.

- **Expenditures by Fund and Material Type** - Use this report to see expenditures grouped by funds (linked to the selected fiscal year) that were used to pay for items (items linked to invoice line item segments).

To run the report, first select a branch, multiple branches or all branches. If your library’s acquisitions tasks are done centrally, select multiple branches or all branches. When multiple branches are selected, the funds are sub-totalled without branch grouping. If your library’s acquisitions tasks are done decentrally, select a single branch to see the fund expenditures for that branch. Next, select the fiscal year. Only one fiscal year can be selected for each report. If the branch uses multiple fiscal years, a separate report must be run for each fiscal period.

Each fund grouping displays the fund’s name and alternative name in a heading. Under the fund heading, the report lists the following information in columns from left to right as follows:

- **Material type** - The material types are sorted alphabetically within the fund group. (This is the item record’s current Material Type, not the linked bibliographic record’s Type of Material (TOM).) Items are counted unless they have been permanently deleted from the database.
- **Purchased** - The number of items of each material type that were paid for using the listed fund. The total in the **Purchased** column shows the total number of items of all material types purchased using the listed fund.
- **Check-Outs** - The number of check out transactions for each material type. The total in the **Check-Outs** column shows the total number of check outs for items of all material types purchased using the listed fund.
- **Amount paid** - The dollar amount paid for the items by material type. The total in the **Amount paid** column is the total for items of all material types paid for using the listed fund.

- **Expenditures by Material Type and Fund** - Use this report to see expenditures grouped by material type and

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**Note:**

If your library supports more than one fiscal year hierarchy for the same collection, the report should be run for each fiscal year hierarchy.

Suppliers are listed on the report if they are linked to:

- Purchase order line items for which amounts have been encumbered in funds linked to the selected fiscal year.
- Invoice line items for which amounts have been expended from funds linked to the selected fiscal year.

To run the report, select a single branch or all branches (you cannot select multiple branches) under Parameters. The fiscal year records for the selected branch (or all branches) are listed. Then, select a fiscal year from the list, and click **Submit**.

- **Expenditures by Fund and Material Type** - Use this report to see expenditures grouped by funds (linked to the selected fiscal year) that were used to pay for items (items linked to invoice line item segments).

To run the report, first select a branch, multiple branches or all branches. If your library’s acquisitions tasks are done centrally, select multiple branches or all branches. When multiple branches are selected, the funds are sub-totalled without branch grouping. If your library’s acquisitions tasks are done decentrally, select a single branch to see the fund expenditures for that branch. Next, select the fiscal year. Only one fiscal year can be selected for each report. If the branch uses multiple fiscal years, a separate report must be run for each fiscal period.

Each fund grouping displays the fund’s name and alternative name in a heading. Under the fund heading, the report lists the following information in columns from left to right as follows:

- **Material type** - The material types are sorted alphabetically within the fund group. (This is the item record’s current Material Type, not the linked bibliographic record’s Type of Material (TOM).) Items are counted unless they have been permanently deleted from the database.
- **Purchased** - The number of items of each material type that were paid for using the listed fund. The total in the **Purchased** column shows the total number of items of all material types purchased using the listed fund.
- **Check-Outs** - The number of check out transactions for each material type. The total in the **Check-Outs** column shows the total number of check outs for items of all material types purchased using the listed fund.
- **Amount paid** - The dollar amount paid for the items by material type. The total in the **Amount paid** column is the total for items of all material types paid for using the listed fund.

- **Expenditures by Material Type and Fund** - Use this report to see expenditures grouped by material type and
then sorted by fund within the material type grouping. To run the report, first select a branch, multiple branches or all branches. If your library’s acquisitions tasks are done centrally, select multiple branches or all branches. When multiple branches are selected, the funds are sub-totaled without branch grouping. If your library’s acquisitions tasks are done decentrally, select a single branch to see the fund expenditures for that branch. Next, select the fiscal year. Only one fiscal year can be selected for each report. If the branch uses multiple fiscal years, a separate report must be run for each fiscal period.

Each material type grouping displays the material type heading. Under the material type heading, the report lists the following information in columns from left to right as follows:

- **Fund** - The funds are sorted alphabetically within the material type group.
- **Purchased** - The number of items of this material type that were paid for using the fund. The total in the Purchased column shows the total number of items with this material type paid for by any of the listed funds.
- **Check-Outs** - The number of check out transactions for each fund. The total in the Check-Outs column shows the total number of check outs for items with this material type purchased using any of the listed funds.
- **Amount paid** - The dollar amount paid for the items by fund. The total in the Amount paid column is the total for items with this material type that were paid using any of the listed funds.

- **Fund Hierarchy Report** - Lists the funds for the selected fiscal year in a hierarchical view (similar to the Fund Explorer view) with sub-funds listed under top-level funds. The top of the report displays the fiscal year’s total amount budgeted, encumbered, expended, available and the total percentage used. If your library orders centrally, you can select the fiscal year for the central processing organization, and the report will display all the top-level funds linked to the selected fiscal year with the subfunds under them. If your library orders decentrally, you can select the fiscal year for a branch, and all the top-level funds linked to the fiscal year will be listed with their subfunds under them. For each top-level fund listed, the following totals are displayed: Total Allocated, Total Encumbered, Total Spent, Total Unspent, Unspent = Total Allocated minus Spent. The totals include all the amounts for the subfunds added together.

- **Fund Summary Report** - Lists the fund activity for the selected fiscal year. The top of the report displays the fiscal year’s total amount budgeted, encumbered, expended, available and the total percentage used. If ordering is done centrally, the user selects the fiscal year for the central processing organization, and all the funds linked to the fiscal year are listed. If ordering is done decentrally, the user selects the fiscal year, and the funds are grouped by branch. The funds are listed with the totals for each individual fund.

- **Fund Transaction Comparisons** - Lists any discrepancies between the amount displayed in the fund balances in the Fund workform and amounts that include manual fund adjustments to encumbrances or expenditures.

- **Funds by Group Name** - Lists the library’s fund activity for a specified date range by fund group name. Enter a part or whole fund name, or a portion of a word within a fund name. To see the activity for the current fiscal year, enter the exact start and end dates for the current fiscal year. The fund activity is available only for open fiscal years.

- **Fund Transaction History** - Lists the entire transaction history for a fund.

- **Invoice Title, Status and Funds** - Lists funds according to the invoice line item segment status.

- **Items by Approval Plan** - Lists items purchased using approval plans within a specified date range, including the material type, unit price, and number of copies for each title ordered under an approval plan.

- **Items by Blanket Plan** - Lists items purchased using blanket plans within a specified date range. It lists the material type, unit price, and number of copies for each title ordered under a blanket plan.
• **Items by Donor Fund** - Lists items purchased with donor funds within a specified date range, including the material type, unit price, and number of copies for each title ordered under a donor fund.

• **Items Ordered by Deposit Account Fund** - Lists items purchased with deposit account funds within a specified date range, including the material type, unit price, and number of copies for each title ordered under a deposit account fund.

• **List of Funds by Fiscal Year** - Lists the fiscal year and fund hierarchy for each library for all open fiscal years and funds. It includes the total amount allocated; the total currently encumbered and expended; the free balance; and the total amount remaining for each fund listed. The Report Parameters window displays the fiscal years according to the selected Organization(s).

• **List of Suppliers by Owning Branch** - The supplier information includes the supplier SAN (Standard Address Number), library account number, order address, payment address, and claim address.

• **Number of Titles by Supplier** - The number of titles that were ordered from a supplier over a specified period of time.

• **Outstanding Claims by Supplier** - Lists unresolved claims made for titles that were ordered but not received.

• **Outstanding Orders** - Lists purchase orders that are pending or have not been paid. It is useful to run this report to see the outstanding orders before running the Fiscal Year Rollover Utility. For each purchase order listed, the report shows the purchase order number, order type, ordering library, and the total amount of the purchase order. For each title ordered, the report shows the number of copies ordered for each destination/collection. To run the report, select the organization for which you want to list the outstanding orders, and select the start and end dates to define a date range. You can limit the report output further by selecting a fiscal year.

  **Tip:**
  For more information on generating and printing reports, see [Using Polaris Standard Reports](#).

• **PO Title Status and Fund** - Use this report to see the status of purchase orders. It lists fund encumbrances and disencumbrances, according to the purchase order line item segment statuses (canceled, on order, pending, received) and payment statuses (open, paid, or prepaid). In the Report Wizard dialog box, select the organization, payment status, and purchase order status. Then, specify the payment status start and end dates, and the purchase order status start and end dates.

• **Preliminary Level Bibliographic Records** - Identifies preliminary bibliographic records created in Acquisitions, so these records can be fully cataloged. When bibliographic information is entered in the **Description** fields of a Purchase Order Line Item (either manually or using Titles to Go), a preliminary bibliographic record is created with an encoding level of 5 (partial or preliminary) in the Leader position 17. The report identifies any bibliographic record with Leader position 17=5, and other details like Title, ISBN, and the number of the linked purchase order. The purchase order must have been released for it to appear in this report. If there is invoice data, it is included in the report.

• **Shelf Ready Items Not Received in Acquisitions** - Use this report to see purchase order line items that have not been updated to Received but the linked shelf-ready items have been checked in. The report lists any purchase order line item segment with a status of Pending, Cancelled, Closed, Currently Received or Received that has linked Items with a circulation status other than On-Order. For more information, see [Check in new shelf-ready items](#).

• **Supplier Performance** - Use this report to see the number of items ordered and received; the fill rate; and the number of items canceled and claimed. Select the library or branch for which you want to see the supplier data,
and select the date range.

• **Uncataloged Titles with Holds** - Use this report to expedite the cataloging of received items that have hold requests. It identifies titles that had no hold requests at the time they were received, but then hold requests were made later on these received items. The report shows the bibliographic record ID number, the title, author, format, received date, and the number of holds. The report is sorted in descending order by the purchase order line item’s receipt date (most recent first), then by title in ascending order. An uncataloged title appears in the report if all items linked to the purchase order line item have a status of **In-Process** or **On-Order**, and at least one item has a status of **In-Process**. This status means that at least one copy of the title in the purchase order line item has been received. Also, the hold requests must have a status of **Active** to appear on the report.

**Note:**
The Holds Purchase Alert Circulation report is useful in making purchasing decisions because it lists titles that are requested frequently, but have too few items to meet the demand. To generate the report, select the Utilities menu from the Polaris Shortcut Bar. Then select Reports and Notices, Circulation, Holds, Holds Purchase Alert. For more information, see [Circulation Reports](#).

### 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 Check In 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.

**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. For more information on Community reports, see **Community Reports & Notice**.

**Authority Reports**

• **Authority Records where 4xx matches 1xx** - Identifies authority records where a See reference (4xx field) in one record matches a heading (1xx field) in another record in the database. It also lists situations where the same authority record contains a 1xx and 4xx that match because of normalization. For example, one field contains the heading using “and” while the other field contains the same heading using “&”.

• **Authority Records with No Linked Bibs** - Identifies authority records that are not linked to any bibliographic record. They may have links to other authority records.

• **Macros for Authority Records - All Staff Members** - Identifies the macros created by all staff members who work with authority records. For each macro, the report specifies the macro name, shortcut keys, description of the macro’s task, creation date, and staff member who added the macro.

• **Macros for Authority Records - Single Staff Member** - Identifies the macros added by a specific staff member who works with authority records. Select the staff member’s name. For each macro, the report specifies the macro name, shortcut keys, description of the macro’s task, creation date, and staff member who added the macro. Generate this report if you want a printed copy of your macros.

• **Problem Authority Headings** - Identifies possible duplicate authority headings where the normalized text is the heading of more than one authority record. It lists the normalized heading that matched, the authority record IDs, the actual heading text, and the thesaurus of the authority record.

• **Unlinked Authority Records** - Identifies all headings not used by any bibliographic record or as a cross-reference for other headings. You can also create a record set of all unlinked authority records and delete the records or open them from the record set, see **Create a record set of unlinked records**.

**Bibliographic Reports**

• **Bibliographic Records No Longer In Database** - Identifies bibliographic records that were purged from the database during a specified period of time. The OCLC Control Number column contains values from the 035 bibliographic tag and the “other system control number” (OCLC control number).
• Bibliographic Records That Do Not Display in PAC - Identifies titles that do not display when you search the public catalog. For each of these titles, the Display in PAC check box is not selected on the Bibliographic Record workform.

• Bibliographic Records With No Format - Identifies bibliographic records without a Type of Material (TOM) code assigned to them. It lists the bibliographic control number, title, and record owner for each bibliographic record that does not have a TOM associated with it. For more information on TOM codes, see Type of Material Codes (TOMs).

• Bibliographic Records With No Linked Authority Records - Identifies bibliographic records that need authority records found or created for them. You can also create a record set of all unlinked authority records and delete the records or open them from the record set. See Create a record set of unlinked records.

• Bibliographic Records With No Linked Items - Identifies bibliographic records for which there are no linked item records. Select the bibliographic record modification date range and the organizations. Set the modification start date far in the past and use today’s date for the end date so that all bibliographic records without linked items are included in the report.

• 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.

• Provisional Bibliographic Records - Identifies all bibliographic records with a status of provisional. A provisional record is an incomplete record that does not appear in the public catalog and cannot be used at checkout.

• Subfield 9 utility log - Identifies records where tags used in automatic processing (to create item records or purchase order/selection list line item segments) were deleted automatically by the $9 Cleanup Utility. On the Parameters tab, select the Begin date and End date. On the Sorting Options tab, select the sort option, and click the right arrow. The report columns will be sorted in the order in which they appear in the list on the right side of the Sorting Options tab. Then, select Ascending or Descending, and click Submit.

For each date listed, the report indicates whether the utility was enabled or not enabled. If the utility did not run that day, Subfield 9 utility not enabled appears without any processing information.

If the utility was run that day, Subfield 9 utility enabled appears along with the settings in the profile at the time the utility was run: Candidate tags will be removed that contain a date earlier than (number) (days, months, or years) ago. The following details of the processing are included: start time, end time, number of bibliographic records checked, and the number of tags deleted. See Setting Utility to Delete Bib Tags Marked with Subfield 9.

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**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** - 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.

  **Tip:**
  See [Taking an Item Inventory](#).

• **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 to include in the report. 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.

  **Note:**
  The Statistical Summary Report under the System folder provides detailed information about activity for the selected organization or organizations. See System Reports.

### Public Services Reports

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

### Patron Services Reports

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

• **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 code, 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. See System Reports.

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**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. See [Set up collection agency processing](ah1113414.htm).

**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 report lists all patrons by selected registered branch who 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.

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**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.

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**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.

**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.

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.

Note: 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).

For more information about these and other Cataloging reports, see Cataloging Reports.

• 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 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.

- **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.

  **Note:**
  The Overdue Items report identifies patrons from other libraries who have overdue items.

- **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 can 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.

**Tip:**
You can send the Reserve Statistics by Course report as a notice to the primary and alternate instructors linked to the active courses. See **Sending Course Reserve Notices**.

- **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. These reports can help you determine, for example, how heavily a collection is used in relation to the size of the collection:

- **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 in to 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. The report includes the total number of circulations and the last circulation date for reference, and is sorted by organization and call number. 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** in the Polaris Reports dialog box. See **System Reports**.

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**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. See Daily Request Processing.

  **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. See Fill hold requests for Requests-To-Fill.

• **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**. See **System Reports**.

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**Interlibrary Loan Reports**

Interlibrary loan reports help you notify patrons when their ILL items have arrived, and track ILL statistics. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **ILL** in the Polaris Reports dialog box.

- **ILL Held Items** - Lists all the held items obtained through interlibrary loan that are awaiting pickup by patrons; includes information about the items and patrons. You may find it useful to run this report daily, so you can contact the patrons waiting for the items. The report is sorted by organization (pick-up library) and ILL Request ID number. You can filter the report by organization (pick-up library).

- **ILL Request Statistics** - For a specified date range, identifies how many interlibrary loan requests have been created for each patron code. The report is sorted by organization (pick-up library) and patron code. You can filter the report by organization (pick-up library).

- **ILL Request Statistics by Workstation** - Tracks how many interlibrary loan requests were placed at each workstation during a specified time period. The report is sorted by organization (pick-up library) and workstation. You can filter the report by pick-up organization.
Borrow by Mail Reports

The following reports help you track Borrow by Mail requests. To access these reports, select Utilities, Reports and Notices from the Polaris Shortcut bar, and select Public Services, Patron Services, Borrow by Mail in the Polaris Reports dialog box.

• **Borrow by Mail Circulation Summary** - A summary of Borrow by Mail circulation (number of check-outs), including material type, the number of items checked out, the number of patrons transacting, and the total number of check-out transactions. Each patron is counted once, regardless of the number of items checked out to that patron, and renewals are not included. You can filter the report by organization (all branches designated as Borrow by Mail processing centers) and specify a date range.

• **Borrow by Mail Holds Summary** - A summary of Borrow by Mail requests, including the number of requests created, requests filled (requests become held), requests checked out, requests unclaimed, and requests cancelled. You can filter the report by pickup organization (processing center) and specify a date range.

Floating Collections Reports

The following reports help you manage floating collections. To access these reports, select Utilities, Reports and Notices, Circulation.

Run these reports immediately after the inventory:

• **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.

Outbound Telephony Reports and Trouble-Shooting

Polaris provides the following reports to help you trouble-shoot problems with Telephony. Select Utilities, Reports and Notices, Notices to access these reports:

• **Telephony Delivery Failure Report** - Lists failed telephone notices with their failure reasons. You can filter this report by date and reporting branch. It includes the patron's barcode, patron's branch, patron's name and telephone number, the failure reason, and the failure date.

• **Telephony Summary Report** - Summarizes the number of calls made for each notice with their statuses, including failure reasons, in a specified date range. The report is organized by patron branch.

  **Important:**
  Inspect this report regularly. In this report, Unknown connection type indicates that a busy signal was received. A sudden spike in the number of busy signals received may indicate telephony board problems.

PAC Reports

To access PAC reports, select Utilities, Reports and Notices from the Polaris Shortcut bar, and select PAC in the
E-Source Reports

The E-Source report lists the subscription databases you have set up for searching from the PAC e-sources page, organized by branch. Information about each e-source includes the name, description, connection URL, message, categories/subcategories, restriction data, and connection data. You can filter the report by organization. For the purposes of custom reports, you can choose to log the transaction when a patron accesses an e-source target:

• **Transaction** - E-Source Access

• **Transaction code** - 2201

• **Transaction subtypes**
  
  • 239 - Remote User flag
  • 240 - Selected Language ID
  • 241 - Name of e-source selected to view
  • 7 - Patron Code (if patron logged on)
  • 123 - Patron Assigned Branch (if patron logged on)
  • 33 - Patron Statistical Code (if patron logged on)

For information about logging transactions, see Collecting Transaction Statistics.

System Reports

To access these reports, select Utilities, Reports and Notices from the Polaris Shortcut bar, and select System in the Polaris Reports dialog box.

• **Statistical Summary** - Detailed information about system activity, including new charges, money collected, refunds, amounts waived, and outstanding fines. To access this report, select Utilities, Reports and Notices from the Polaris Shortcut bar, and select System in the Polaris Reports dialog box.

• The **Hierarchy of Library, Branches, & Collections** report lists all the collections assigned to each branch in the system, organized by system, library, and branch. You can filter the report by organization. To access this report, select Utilities, Reports and Notices from the Polaris Shortcut bar, and select System in the Polaris Reports dialog box.

Invalid Postal Codes Report

You can run the Polaris System report Invalid Postal Codes to identify the invalid postal codes (both U.S. and Canadian) currently in use, and the patron, fund, and supplier records that are using the invalid codes.

Staff and Workstation Reports

The following reports identify the staff members and workstations registered in Polaris.

• **Affiliated Branches of Staff Members** - Lists the staff members associated with each branch, organized by system, library, and branch. You can filter this report by organization.
• **Hierarchy of Libraries, Branches & Workstations** - Lists the workstations assigned to each branch in the system, organized by system, library, and branch, including the computer names and workstation display names. You can filter this report by organization.