

Reports and Notices with Polaris

Jodi Dahlgren, Library Manager

Wainwright Public Library

780-842-2673

librarian@wainwrightlibrary.ab.ca

Reports and Notices with Polaris

- ▶ Weekly Reports
- ▶ Weekly/ Monthly Reports
 - ▶ Statistics
- ▶ As Required Reports
 - ▶ Budget
 - ▶ Weeding

Weekly Reports

- ▶ **Overdue Call List:** This report can be run weekly and used to give a reminder phone call to your patrons with overdue items.
- ▶ **Utilities → Reports and Notices → Custom → Overdue Call List**

Weekly Reports

- ▶ **Posting to the Database (Overdues):** This updates the status of overdue items that your patrons have out. When asked “Do you want to post to the database?” - click Yes. Be sure to print the copies if you want to mail to your patrons.
- ▶ **Utilities → Reports and Notices → Notices → Overdues → Overdues Full Page Mailer (or Overdues Half Page Mailer or Overdues Postcard)**

Weekly Reports

- ▶ **Posting to the Database (Billing):** This switches the long overdue items that your patrons have out to lost and automatically charges their account. When asked “Do you want to post to the database?” - click Yes. Be sure to print the copies if you want to mail as a bill.
- ▶ **Utilities → Reports and Notices → Notices → Billing → Billing Full Page Mailer (or Billing Half Page Mailer or Billing Postcard)**

Weekly Reports

- ▶ **Unclaimed Holds by Pickup Branch:** This report lists the items that have been on your hold shelf and now have a status of unclaimed. You should pull these items and check them in and send on to the next patron.
- ▶ **Utilities → Reports and Notices → Custom → Unclaimed Holds by Pickup Branch**

Unclaimed by Pickup Branch

Pickup Branch	Title	Author	Patron	Patron Barcode	Patron Phone	Status	Hold Until Date
---------------	-------	--------	--------	----------------	--------------	--------	-----------------

Weekly Reports

- ▶ **Unclaimed Item Assigned Holds by Assigned Branch:** This report lists your items that have been on other library's hold shelf and now have a status of unclaimed. You can contact the library and ask them to send the item along.
- ▶ **Utilities → Reports and Notices → Custom → Unclaimed Item Assigned Holds by Assigned Branch**

Unclaimed Holds by Item Assigned Branch

Pickup Branch	Title	Author	Item Barcode	Item Branch	Patron	Patron Barcode	Patron Phone	Status	Hold Until Date
---------------	-------	--------	--------------	-------------	--------	----------------	--------------	--------	-----------------

Weekly/Monthly Reports

- ▶ **Lost Items:** This report lists all the items that belong to your library and are lost. It also lists who the patrons are and what library they are from.
- ▶ **Utilities** → **Reports and Notices** → **Custom** → **Lost Items**

Lost Items by Item's Owning Library

Patron Library	Transacting Library	Item Barcode	Title	Call Number	Price	Patron	Patron Barcode	Patron Phone	Item Status	Date Lost
----------------	---------------------	--------------	-------	-------------	-------	--------	----------------	--------------	-------------	-----------

Weekly/Monthly Reports

- ▶ **Missing Items:** This report lists all the items that belong to your library and are missing and the date that they were placed to missing.
- ▶ **Utilities** → **Reports and Notices** → **Custom** → **Missing Items**

Missing Items by Library

Item Barcode	Title	Author	Collection	Call No	Item Status	Date Missing
30099000294518	PSYCHOLOGISTS BOOK OF SELF TESTS 02(25)99 LOVE SEX INTELLIGENCE CAREER AND PERSONALITY TESTS DEVELOPED BY PROFESSIONALS TO REVEAL THE REAL YOU	JANDA LOUIS H	NF	A 150.287 JAN	Missing	6/30/2014 9:30:07 AM
30099000130894	RUBBER DUCK	DOUGLAS JACK 04(1908)99 04 (1989)99	NF	A 818.5 DOU	Missing	9/12/2014 5:16:42 PM

Weekly/Monthly Reports

- ▶ **Claimed Items:** This report shows you all the “Claimed Returned” and “Claimed Never Had” items that belong to your library. You can check your shelves and contact the transacting library to see if the items turn up. If they haven’t turned up after 6 months, you can charge the patrons or transacting library for the item.
- ▶ **Utilities → Reports and Notices → Cataloging → Item → Claimed Items**

Weekly/Monthly Reports

- ▶ **In-Transit and Transferred Items:** This report shows all items that belong to your library and have a status of “in-transit” or “transferred.” Chose a “date before” of at least a month and it will only show items that have been shipped for more than two months. You can check your shelves and contact the sending library and ask them to check their shelves. If the item is not found, you can place to missing and reactivate the hold (if required.)
- ▶ **Utilities → Reports and Notices → Custom → In-Transit and Transferred Items**

In-Transit

Item Barcode	Title	Author	Owning Library	Sending Library	Receiving Library	Sent Date	Status Date	Status
30099000091435	The house on the Strand	Du Maurier, Daphne, Dame, 1907-1998.	Wainwright Public Library	Drayton Valley Municipal Library	Wainwright Public Library	12/21/2012 10:39:49 AM	12/21/2012 10:39:49 AM	In Transit
30800008512573	The walking dead. Book four : a continuing story of survival horror	Kirkman, Robert	Wainwright Public Library	Morinville Public Library	Wainwright Public Library	2/4/2013 5:53:01 PM	2/4/2013 5:53:01 PM	In Transit

Statistics

- ▶ **Statistical Summary:** This is a quick summary that you can give to your board members.
- ▶ **Utilities** → **Reports and Notices** → **Custom** → **Statistical Summary (Custom)**

Statistical Summary (Custom)					
8/1/2014 5:49:15 PM - 8/31/2014 5:49:15 PM					
Region: Northern Lights - Branch: Wainwright Public Library					
Record Counts - As of Tuesday, September 16, 2014					
Items	Items Withdrawn	Patrons	Active Staff	Workstations	
34,733	9,790	1,300	10	15	
Circulation Statistics					
Check Outs	Unique Patrons	Check In	Overdue Items Checked In	Staff Overrides	
3,349	325	2,749	283	0	
Holdings Placed	Holdings Satisfied	Holdings Cancelled	Items Borrowed	Items Lent	
236	513	81	655	751	
Records Added and Deleted					
	Items	Patrons			
Added by Branch	152	23			
Deleted by Branch	0	5			
Withdrawn by Branch	2				
Financials					
New Charges	Money Collected	Refunds	NET	Amounts Waived	Credits
\$392.32	\$167.99	\$0.00	\$224.33	\$107.94	\$0.00
Total Outstanding Fines - As of 9/16/2014 5:49 PM					
					\$2,743.40
PAC Statistics					
Logins	Items Renewed	Holdings Placed	Holdings Cancelled		
643	347	415	11		

Statistics

- ▶ **Item Circulation by Collection:** This report lists the number of items, check outs, renewals.
- ▶ **Utilities** → **Reports and Notices** → **Circulation** → **Item Circulation by Collection**

Item Circulation By Collection				
From 8/1/2014 To 8/31/2014 11:59:59 PM				
Wainwright Public Library				
	Items	Checkouts	Renewals	Total Renewals and Checkouts
<None>	11	10	1	11
Audiobook - MP3	3	3	0	3
Audiobook - MP3 - Adult	4	4	0	4
Audiobook Compact Disc	123	111	32	143
Audiobook Compact Disc - Adult	19	18	2	20
Audiobook Compact Disc - Juvenile	2	0	2	2
Audiobook Compact Disc - Young Adult	1	1	0	1
Block Audiobooks	2	0	2	2
Blu-Ray	19	22	2	24
Blu-Ray - Adult	3	3	0	3
Board Book	70	61	27	88
Christian Fiction	9	8	2	10

Statistics

- ▶ **Circulation by Items Assigned Branch:** This report lists the check outs of your items by other libraries. It only lists the check outs and not renewals.
- ▶ **Utilities** → **Reports and Notices** → **Circulation** → **Circulation by Items Assigned Branch**

Circulation By Items Assigned Branch		
From 8/1/2014 To 8/31/2014 11:59:59 PM		
Item Branch: Wainwright Public Library	Items	Circulations
Loaning Branch: Airdrie Public Library		
Book	19	20
Book - Large Print	2	2
Book - Paperback	1	1
Book on CD	1	1
Video - Blu Ray	1	1
Video - DVD	3	3
Total Transactions For Loaning Branch:	27	28
Loaning Branch: Alberta Beach Municipal Library		
Video - DVD	1	2
Total Transactions For Loaning Branch:	1	2
Loaning Branch: Alice B. Donahue Library and Archives		

Statistics

- ▶ **Circulation by Items Loaning Branch:** This report lists the check outs of items belonging to other libraries by your patrons. It only lists the check outs and not renewals.
- ▶ **Utilities** → **Reports and Notices** → **Circulation** → **Circulation by Items Loaning Branch**

Circulation By Items Loaning Branch		
From 8/1/2014 To 8/31/2014 11:59:59 PM		
Loaning Branch: Wainwright Public Library	Items	Circulations
Item Branch: Acadia Municipal Library		
Book	1	1
Total Transactions For Item Branch:	1	1
Item Branch: Airdrie Public Library		
Book	18	18
Book - Large Print	1	1
Book on CD	1	1
Video - Blu Ray	1	1
Video - DVD	7	9
Total Transactions For Item Branch:	28	30
Item Branch: Alberta Beach Municipal Library		
Video - DVD	6	11

As Required Reports

- ▶ **Notification Summary by Date:** This report lists all the notifications within a particular date range. It lists the telephony and email notices.
- ▶ **Utilities → Reports and Notices → Custom → Notification Summary by Date**

As Required Reports

- ▶ **Telephony Call History:** This report lists all the notices made by telephony within a particular date range.
- ▶ **Utilities → Reports and Notices → Custom → Telephony → Telephony Call History**

Budget

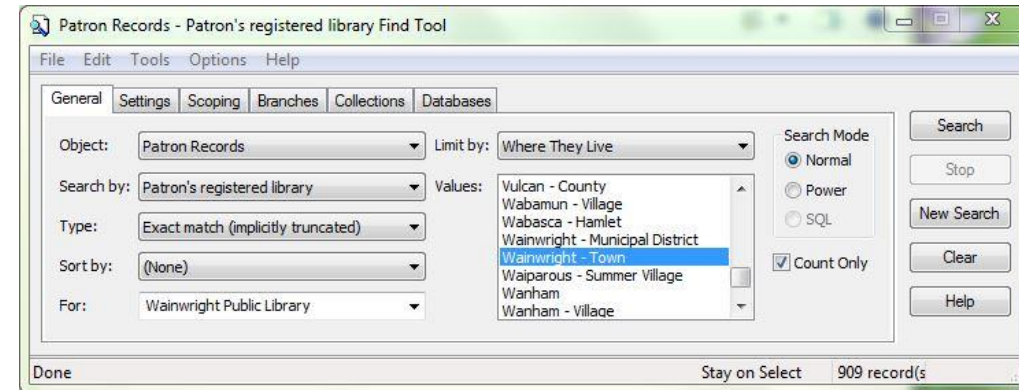
- ▶ **County vs. Municipal patrons:** This can tell you how many patrons are registered at your library that have the town or the County as their “where they live.”

- ▶ **Patron Services → Patron Records**

OR

- ▶ **Circulation → Patron Status**

- ▶ By checking off the “count only,” the report pulls up much faster and just gives you the number.



Budget

- ▶ **Collection Value:** This report shows the value of all your library materials that are listed in Polaris. It breaks it down per collection.
- ▶ **Utilities → Reports and Notices → Cataloging → Item → Collection Value by Organization**

Collection Value By Organization

Wainwright Public Library

Audiobook Cassette (0 of 3 items excluded)	\$71.45
Audiobook Compact Disc (0 of 565 items excluded)	\$22,856.64
Blu-Ray (0 of 46 items excluded)	\$1,065.44
Board Book (0 of 317 items excluded)	\$2,572.60
DVD (0 of 1380 items excluded)	\$27,596.37
Easy Reader (0 of 1655 items excluded)	\$8,878.64

Weeding

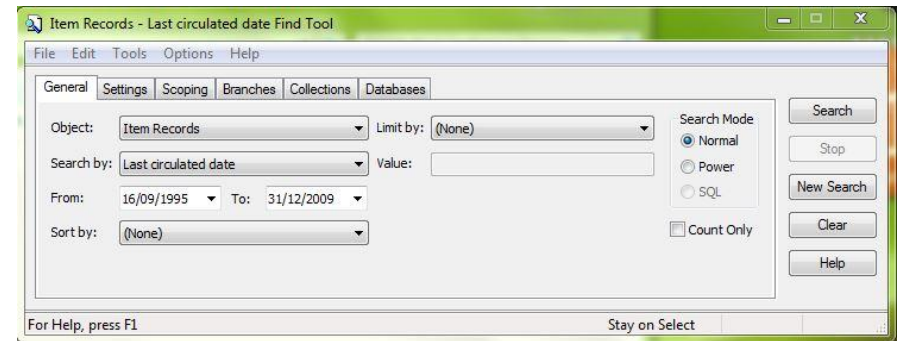
- ▶ **Last Circulated Date:** This pulls items that have last circulated within the date parameters that you chose.

- ▶ **Cataloging → Item Records**

Search by: Last Circulated Date

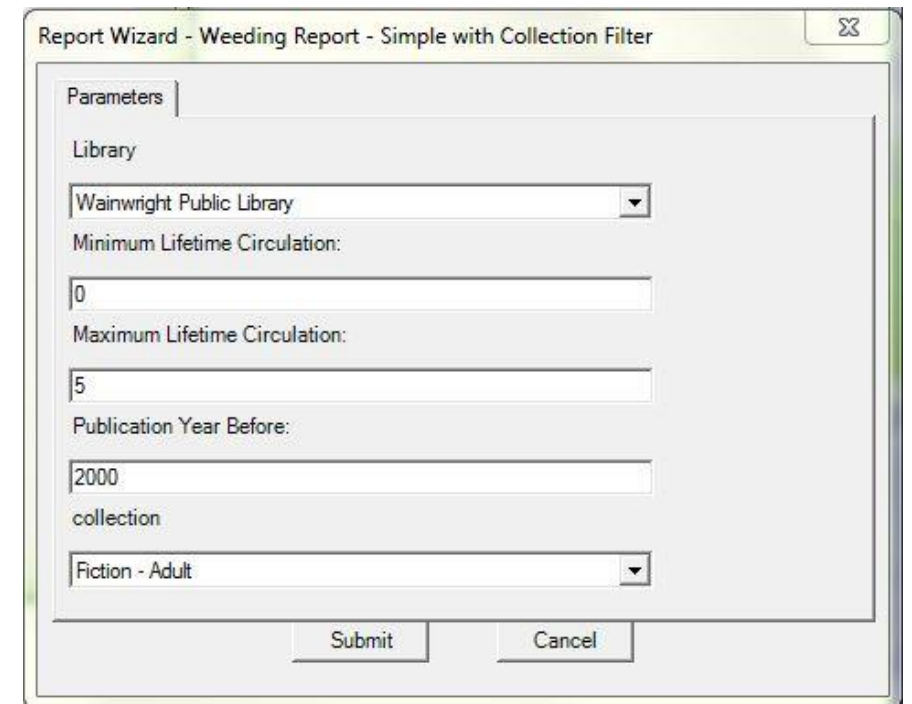
From: whatever dates you would like.

Under the Branches tab, chose your library and under the Collections tab chose which collection you would like to weed.



Weeding

- ▶ **Weeding Report – Simple with Collection Filter:** These items have not circulated in the current or previous year. You can choose the total number of circulations when creating the report.
- ▶ **Utilities → Reports and Notices → Custom → Weeding Report-Simple with Collection Filter**



Report Wizard - Weeding Report - Simple with Collection Filter

Parameters

Library
Wainwright Public Library

Minimum Lifetime Circulation:
0

Maximum Lifetime Circulation:
5

Publication Year Before:
2000

collection
Fiction - Adult

Submit Cancel

Reports and Notices with Polaris

Jodi Dahlgren, Library Manager

Wainwright Public Library

780-842-2673

librarian@wainwrightlibrary.ab.ca