

Report Comparison – Dynix and Polaris

Report Monthly Statistics

Dynix Reports	Polaris Reports
CKO	Circulation – Item Circulation Stats Report Output: Total number of First time Checkouts, Renewals (Regular, Phone and Self) by Material Type (Book, DVD etc.)
CKI	From System – Statistical Summary
FINES LEVIED LOSTBOOK LEVIED DAMAGES LEVIED FEES LEVIED CARD LEVIED	
FINES COLLECTED LOSTBOOK COLLECTED OVERPAYMENT DAMAGED COLLECTED FEES COLLECTED CARD COLLECTED	Public Services – Patron Financial - Fines and Fees Summary Output: Total amounts for fines and fees transactions (For e.g. Payments, refunds, charges, Card Fee, damaged collected etc.) Daily Cash Drawer Output: Overdue, Processing Fees, Credit refund etc. Note: Daily Cash Drawer report is by Workstation and not by branch.
FINES WAIVED	Public Services – Patron Financial – Waived Fines Report Output: All waived fines in a time range (Daily, Weekly, Monthly etc.)
Holds Placed	Utilities – Reports and Notices – System – Statistical Summary
Holds Filled	Utilities – Reports and Notices – System – Statistical Summary
Holds Cancelled	Utilities – Reports and Notices – System – Statistical Summary
In House Use	Circulation – In House Use Report Output: Number of In house use for items checked in using in-house mode.
Item Statistical Classes	Item Circulation by Collection Output: Checkout and Renewals broken down by Collection Codes.
Patron Statistical Classes	N/A

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Patron types	Public Services – Patron Services – Patron Register Output: Number of patrons registered by Patron Code in a time range. Public Services – Patron Services – Patron Circulation Statistics Output: Total Checkouts and renewals by Patron code. Public Services – Patron Services – Patron Code Statistics Output: Transactions by Patron Code including number of patrons deleted.
	New In Polaris: Circulation – Item Circulation Statistics Output: Circulation by Material Type (Book, DVD etc)

RMIS – Inter/Intra Library Loan Statistics	
Loaned To	Circulation by Item Assigned Branch
Borrowed From	Circulation by Item Loaning Branch
Out of System	N/A - by Patron Code Circulation Patron Codes- Library and Institutional Library – Loaned to Out of System Institutional – Loaned to Schools

RIS – Report of Item Status	Cataloging Item Reports
Claim Returned	Cataloging – Item – Claimed Items
In Transit	Cataloging – Item – In-Transit Items
Lost	Cataloging – Item – Lost and Missing Items
Missing	
Missing Inventory	
Transit Hold	N/A
	New: Cataloging - Item – Item Status Output – Count of items for all the circulation statuses

Recall Reports	
Expired Patrons	Utilities – Reports and Notices – Public Services – Patron Services – Expired Patrons Output: Lists of Patrons whose cards have expired before a specific date as criteria.
Total Value of Collection	Utilities – Reports and Notices – Cataloging

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	<p>– Item – Collection Value by Organization Output: Value and Total breakdown by Collection as of date the report is run.</p> <hr/> <p>Run this report for reporting your total value of holdings</p> <hr/>
Added Holdings	Utilities – Reports and Notices – System – Statistical Summary
Deleted Holdings	Utilities – Reports and Notices – System – Statistical Summary
Number of Items in each Collection	<p>N/A Workaround: Cataloging – Item Records – In General Tab by Collection for * Branches Tab: Unselect all – Select only the branch you are searching for Limit by Collection Value: Highlight the collection Check mark count only The number is displayed for that collection.</p>
List of Titles in each Collection	<p>N/A Workaround: Cataloging – Item Records – General Tab by Collection and for the name of the collection as listed in Polaris Limit by Assigned Branch Value – Name of the branch Click on search</p>
Patron count by Patron Statistical Class	<p>N/A Workaround: From Polaris Shortcut Bar Patron Services Patron Records Patron Find Tool comes up By Field: “Where they live” from drop down For Field: Enter Statistical Class for which you need the count for. For e.g. Grande Prairie – County Limit By: Patron Registered Library Value: Name of the Library (highlight)</p>

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	<p>Click on “Search”</p> <p>The patron list appears below and the count appears below the list.</p> <p>If you need only the count, put a checkmark in the “Count Only” box in the Find Tool.</p> <p>The count appears in the bar below.</p>
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Daily Reports	
RHA – Reports Holds Alert	<p>3 ways to Print</p> <p>I Method:</p> <ol style="list-style-type: none"> 1. Circulation – Request Manager – Make sure the status is Pending 2. Click on the down arrow by the Printer icon on the top left hand corner below File Menu. 3. Select one of the views <p>II Method:</p> <ol style="list-style-type: none"> 1. Utilities – Reports and Notices – Custom – Hold Requests to Fill <p>III Method:</p> <ol style="list-style-type: none"> 1. Utilities – Reports and Notices – Circulation – Holds – Hold Requests to fill
RON – Run Overdue Notices	Utilities – Reports and Notices – Overdues
	<p>Held Call List</p> <p>Utilities – Reports and Notices – Custom</p> <p>Output: List of Patron for whom items are being held.</p> <p>Patron Name, Phone Number, Title, Call No., Held Date and Hold till Date</p>
	<p>Overdues Call List</p> <p>Utilities – Reports and Notices – Custom</p> <p>Output: List of Patrons with overdues</p> <p>Patron Name, Phone Number, Title, Call No., Due Date and CKO Date.</p>
	<p>Overdue Patrons</p> <p>Utilities – Reports and Notices – Circulation – Overdue Patrons</p> <p>Output: List of patrons with overdues Patron Name, Address, Barcode, Phone Number, Title,</p>

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	Magterial/Barcode, Call Number, Due date and Item Branch.
	Overdue Items Utilities – Reports and Notices – Circulation – Overdue Items Output: List of Titles, Material Format/Barcode, Borrower/Branch and Phone Number