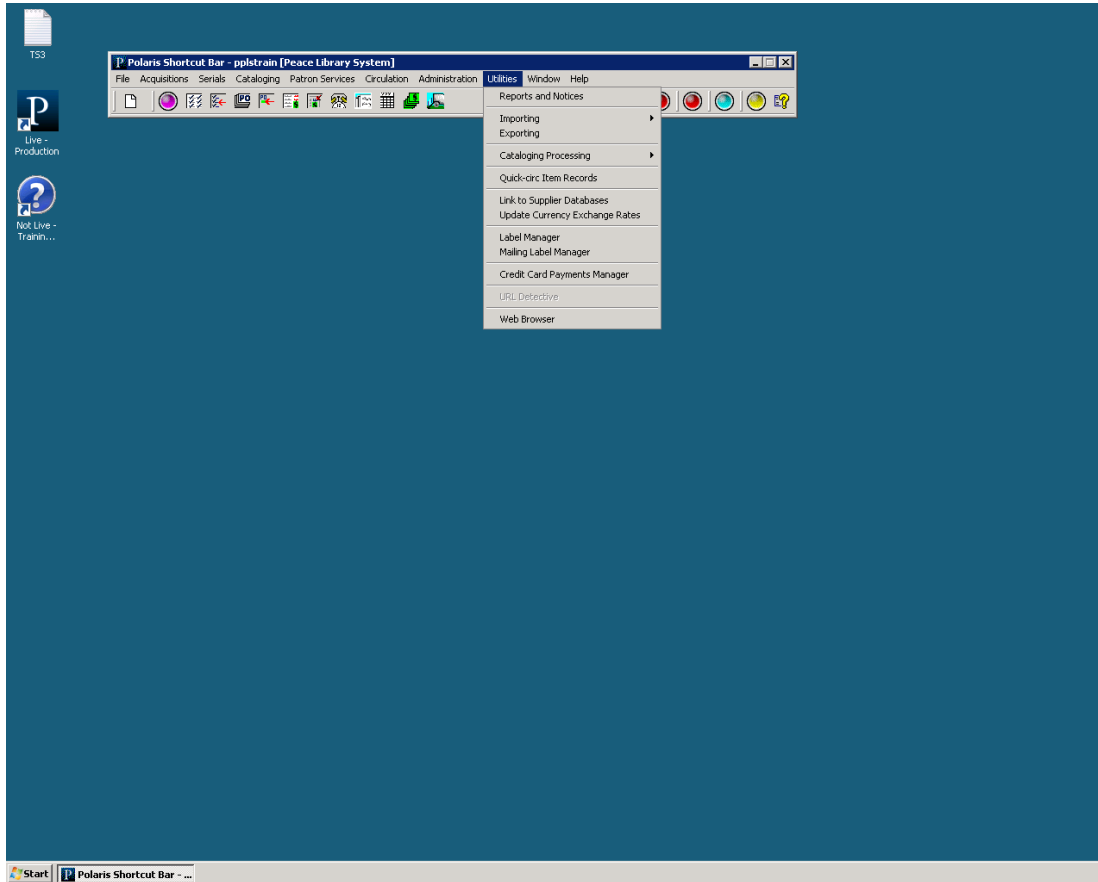


Running Reports in Polaris

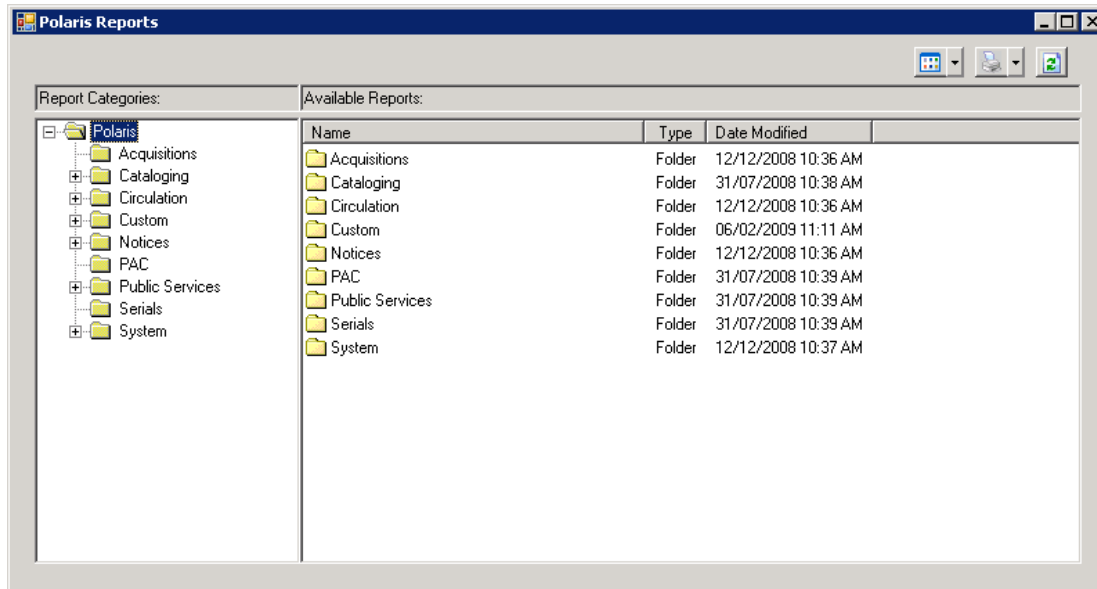
How to access reports and notices in Polaris

1. In the Polaris Shortcut Bar, click on Utilities, and then click on Reports and Notices

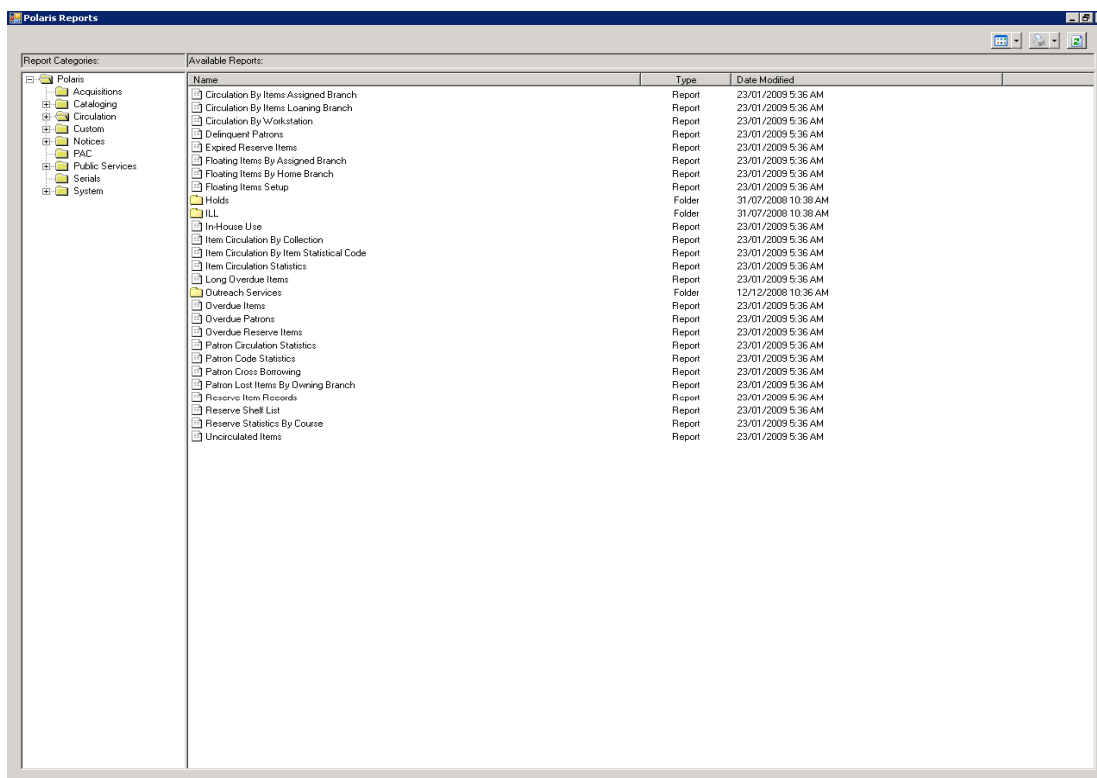


2. The report and notices window will pop up.

Running Reports in Polaris



3. Double Click on Circulation folder. You will see the following reports.



4. Your report setup wizard will pop up when you double-click on a report. You will have to select your library, and for some reports a date or a time frame, or other parameters. When you click on "Begin Date" and "End Date" calendar will pop up and you can use back or forward arrows to select the month and date.

Running Reports in Polaris

Report Setup Wizard

Parameters

Begin Date: February 08, 2009 12:00 AM

End Date: February 08, 2009 11:59 PM

Branch: <All>

Submit Cancel

Report Setup Wizard

Parameters

Begin Date: January 08, 2009 12:00 AM

End Date: January 31, 2009 11:59 PM

Branch: <All>

- Bear Point Community Library
- Beaverlodge Public Library
- Beaverlodge Regional High School
- Beiseker Municipal Library
- Berry Creek Community Library
- Berwyn Municipal Library
- Bibliotheque de Beaumont Library
- Bibliotheque de St. Isidore

Submit Cancel

5. Click on Submit to run the report.

6. Following the steps try to run and view the following reports:

Expand Cataloging → Item → Lost-Missing Items

Claimed Items

Collection Value by Organization – Gives the total value of your holdings.

Polaris Reports

Report Categories:

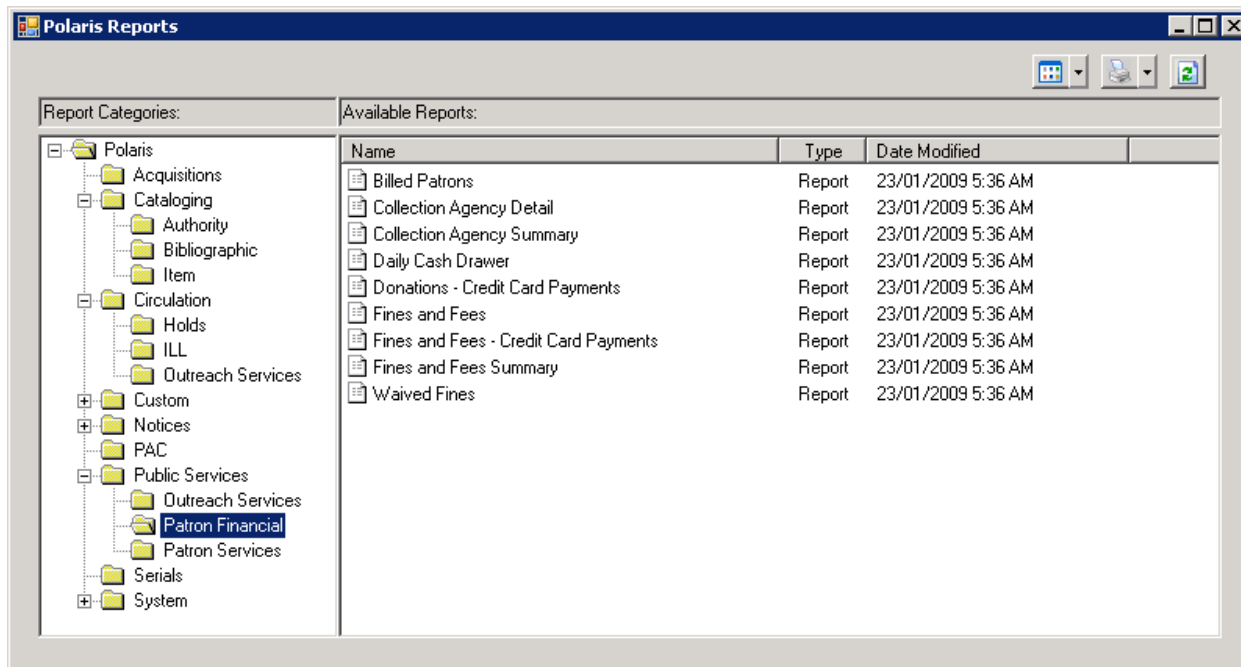
- Polaris
 - Acquisitions
 - Cataloging
 - Authority
 - Bibliographic
 - Item
 - Circulation
 - Custom
 - Notices
 - PAC
 - Public Services
 - Serials
 - System

Available Reports:

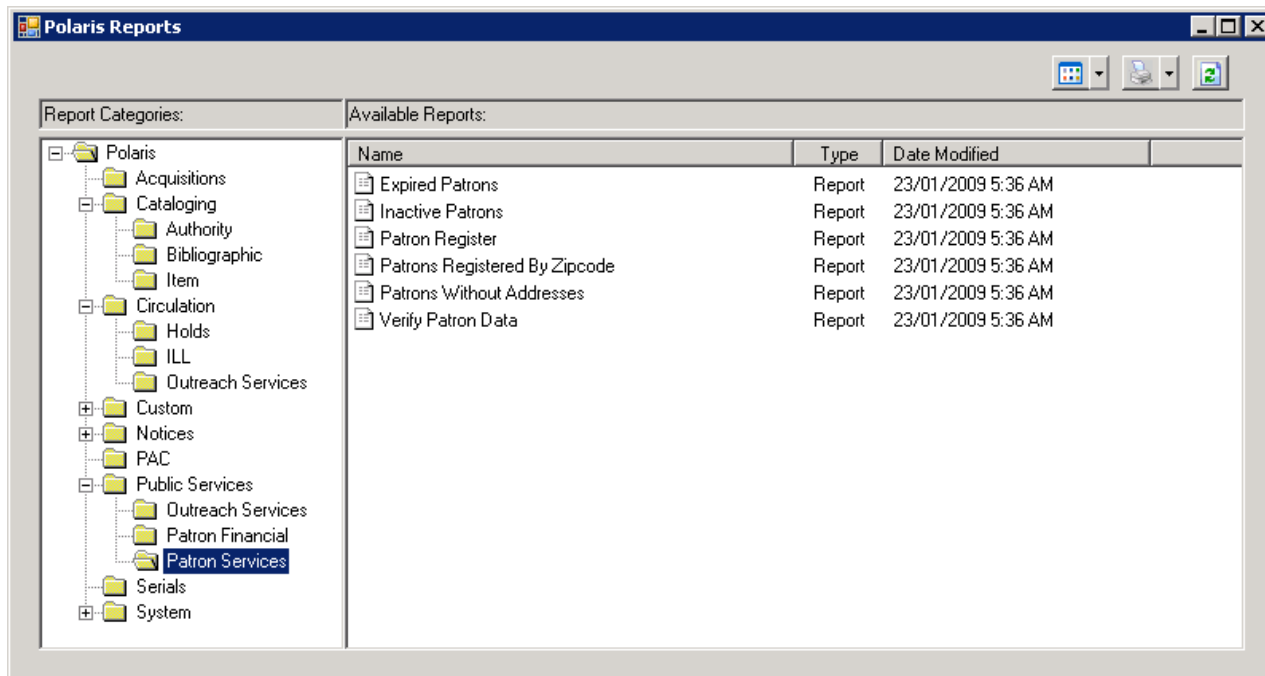
Name	Type	Date Modified
Claimed Items	Report	23/01/2009 5:36 AM
Classification Number List	Report	23/01/2009 5:36 AM
Collection Value By Organization	Report	23/01/2009 5:36 AM
In-Transit Items	Report	23/01/2009 5:36 AM
Inventory Exception - Incorrect Status	Report	23/01/2009 5:36 AM
Inventory Exception - Missshelved	Report	23/01/2009 5:36 AM
Inventory Shelflist	Report	23/01/2009 5:36 AM
Item Records by Funding Source and Stat Code	Report	23/01/2009 5:36 AM
Item Records That Do Not Display In PAC	Report	23/01/2009 5:36 AM
Item Records Without Barcodes	Report	23/01/2009 5:36 AM
Item Status	Report	23/01/2009 5:36 AM
Lost and Missing Items	Report	23/01/2009 5:36 AM

Running Reports in Polaris

7. Expand Public Services → Patron Financial → Fines and Fees, Waived Fines, Fees and Fines Summary



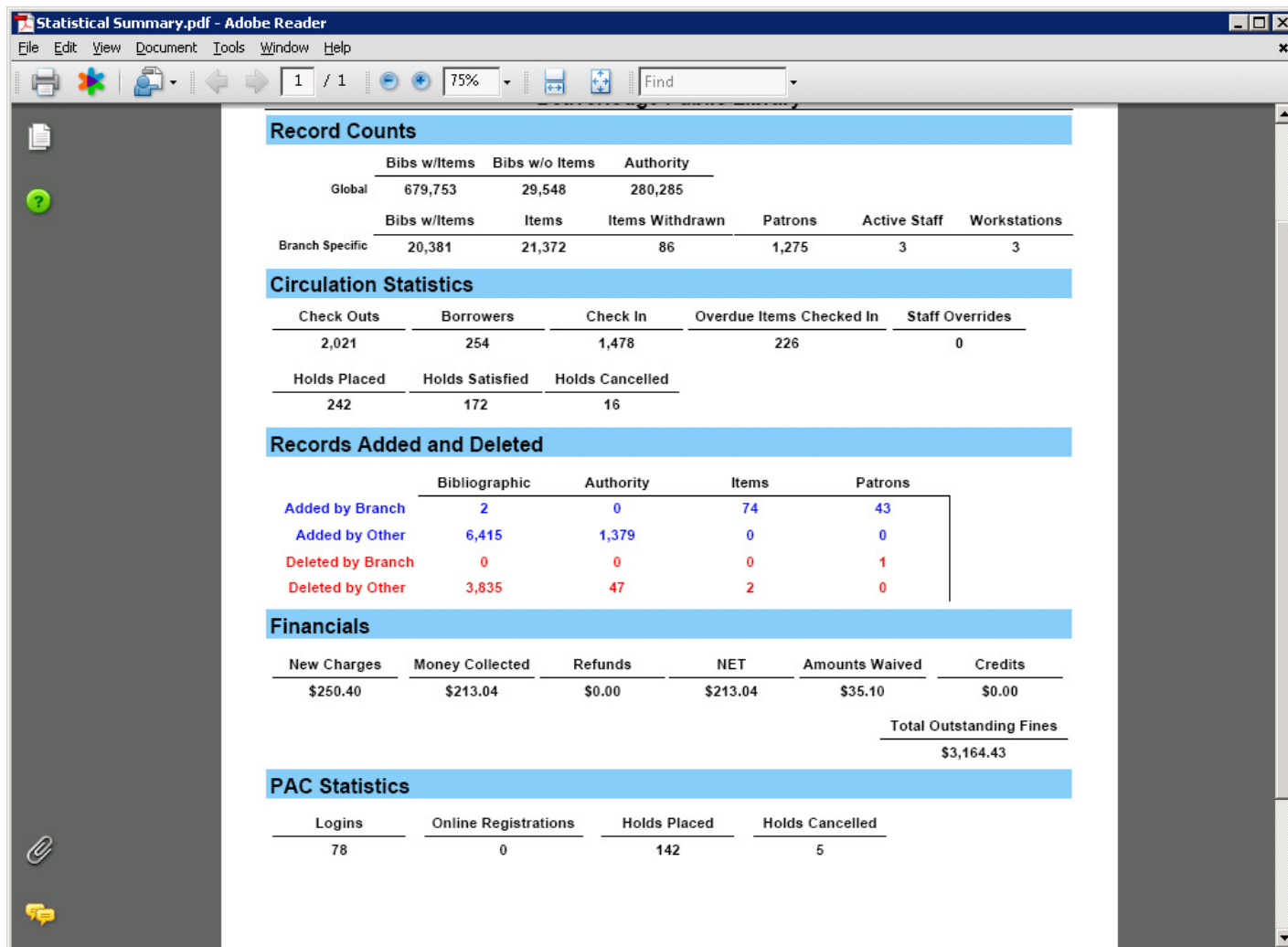
8. Expand → Patron Services → Patron Register, Patron Registered by Zipcode, Expired Patrons etc.



9. Expand System – Statistical Summary. This is a very nice summary. For this you define the beginning and ending dates and select your branch.

Running Reports in Polaris

10. Put a checkmark in the summary box in the left hand bottom corner. Click on submit. The output is a concise report. See below.



The screenshot shows a PDF document titled "Statistical Summary.pdf" in Adobe Reader. The document contains several tables of library statistics. The left sidebar of the Adobe Reader is visible, showing a green question mark icon and a paperclip icon.

Record Counts

	Bibs w/Items	Bibs w/o Items	Authority
Global	679,753	29,548	280,285

Branch Specific	Bibs w/Items	Items	Items Withdrawn	Patrons	Active Staff	Workstations
	20,381	21,372	86	1,275	3	3

Circulation Statistics

Check Outs	Borrowers	Check In	Overdue Items Checked In	Staff Overrides
2,021	254	1,478	226	0

Holdings Placed	Holdings Satisfied	Holdings Cancelled
242	172	16

Records Added and Deleted

	Bibliographic	Authority	Items	Patrons
Added by Branch	2	0	74	43
Added by Other	6,415	1,379	0	0
Deleted by Branch	0	0	0	1
Deleted by Other	3,835	47	2	0

Financials

New Charges	Money Collected	Refunds	NET	Amounts Waived	Credits
\$250.40	\$213.04	\$0.00	\$213.04	\$35.10	\$0.00

Total Outstanding Fines
\$3,164.43

PAC Statistics

Logins	Online Registrations	Holdings Placed	Holdings Cancelled
78	0	142	5

11. Expand Notices →Overdues → Number of notices to choose from.

Please note, select specific pages and view only one page.

12. **NEW: Holds Requests to Fill - Run from Custom Folder**

Double click on the Custom folder. Select Holds_Requests_To_Fill.

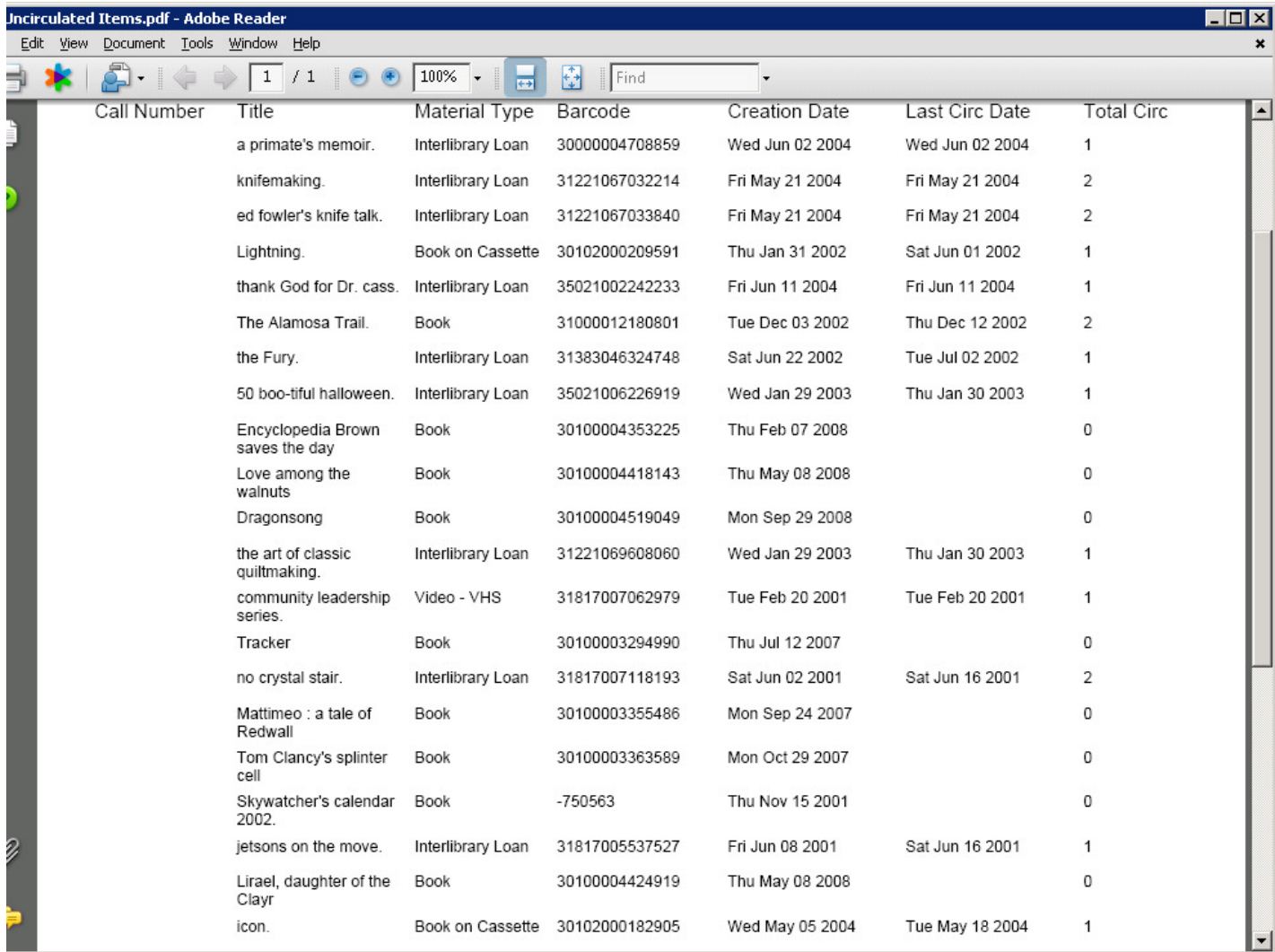
This gives you a report with columns and includes shelf location. So that it is easy to pick the books.

Weeding:

Uncirculated Items reports can be used to help with weeding books that are not circulating. Set the before date to number of years (depending on your library's weeding policy).

Running Reports in Polaris

Enter a maximum circulated lifetime (e.g. If you select 5, items that have circulated 6 or fewer times will show up in the report), select your library, select specific page and view only 1 page.
You will see a report as follows:



Call Number	Title	Material Type	Barcode	Creation Date	Last Circ Date	Total Circ
	a primate's memoir.	Interlibrary Loan	30000004708859	Wed Jun 02 2004	Wed Jun 02 2004	1
	knifemaking.	Interlibrary Loan	31221067032214	Fri May 21 2004	Fri May 21 2004	2
	ed fowler's knife talk.	Interlibrary Loan	31221067033840	Fri May 21 2004	Fri May 21 2004	2
	Lightning.	Book on Cassette	30102000209591	Thu Jan 31 2002	Sat Jun 01 2002	1
	thank God for Dr. cass.	Interlibrary Loan	35021002242233	Fri Jun 11 2004	Fri Jun 11 2004	1
	The Alamosa Trail.	Book	31000012180801	Tue Dec 03 2002	Thu Dec 12 2002	2
	the Fury.	Interlibrary Loan	31383046324748	Sat Jun 22 2002	Tue Jul 02 2002	1
	50 boo-tiful halloween.	Interlibrary Loan	35021006226919	Wed Jan 29 2003	Thu Jan 30 2003	1
	Encyclopedia Brown saves the day	Book	30100004353225	Thu Feb 07 2008		0
	Love among the walnuts	Book	30100004418143	Thu May 08 2008		0
	Dragonsong	Book	30100004519049	Mon Sep 29 2008		0
	the art of classic quiltmaking.	Interlibrary Loan	31221069608060	Wed Jan 29 2003	Thu Jan 30 2003	1
	community leadership series.	Video - VHS	31817007062979	Tue Feb 20 2001	Tue Feb 20 2001	1
	Tracker	Book	30100003294990	Thu Jul 12 2007		0
	no crystal stair.	Interlibrary Loan	31817007118193	Sat Jun 02 2001	Sat Jun 16 2001	2
	Mattimeo : a tale of Redwall	Book	30100003355486	Mon Sep 24 2007		0
	Tom Clancy's splinter cell	Book	30100003363589	Mon Oct 29 2007		0
	Skywatcher's calendar 2002.	Book	-750563	Thu Nov 15 2001		0
	jetsons on the move.	Interlibrary Loan	31817005537527	Fri Jun 08 2001	Sat Jun 16 2001	1
	Lirael, daughter of the Clayr	Book	30100004424919	Thu May 08 2008		0
	icon.	Book on Cassette	30102000182905	Wed May 05 2004	Tue May 18 2004	1

Running Reports in Polaris

Note: All your reports are in PDF format, but you can select to generate them in other formats, such as excel. Click on the drop down by the printer icon and you will see the options.

