

This document lists all reports available through the Utilities menu of the Shortcut bar in Polaris deemed to be necessary, recommended or useful to Marigold Library System member libraries. It includes basic information on how they can be accessed, the recommended frequency with which they should be run and important notes related to each report.

MLS Polaris Reports

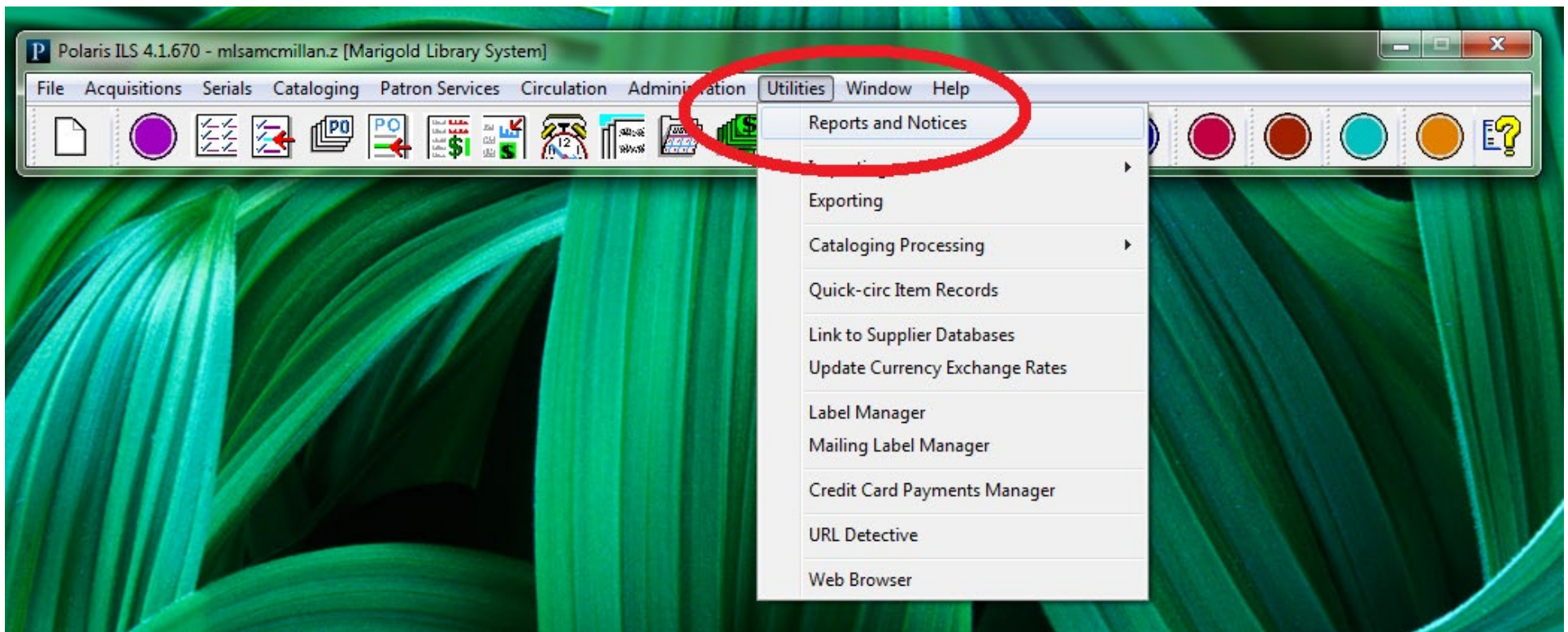
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For more information contact your Marigold consultant

MLS Polaris Reports

To access these reports:

- *Log in to Polaris*
- *Click on “**Utilities**” on the Shortcut Bar*
- *Select “**Reports and Notices**” from the sub-menu*
- *Once the Polaris Reports window opens, select the appropriate folder where the desired report is located*



Daily Reports

Name	Location	Description/Procedure	Required
Daily Notification Summary	Custom	Can see all the notices sent out and the status. This is great to have in situations where patrons say they were not notified. You can double check on this report. You can request to have this report sent to you every morning.	Yes (smaller libraries can run weekly)
Telephony Failures	Custom → Telephony	Note: <i>This report will usually come up blank.</i>	Yes (smaller libraries can run weekly)
Request to Fill (Request Manager)	Circulation -> Request Manager [Note: This report is not in the Reports and Notices menu]	Shows all items which are requested by other libraries. Select your branch and resize the columns to how you want to see them when they are printed. Select File, print, list view to print the request to fill report. Pull the requested items from the shelf and check them in to fill the hold.	Yes

Weekly Reports

Name	Location	Description/Procedure	Required
Overdues Z Fold Mailer	Notices → Overdues	This report is very important to run weekly in order to post the information to the database. You may select a different format than the “Z-fold Mailer” if you prefer, but you must run one type of Overdues report from the list in the “Notices” folder. Note: <i>This report will usually come up blank for most libraries as the majority of patrons are now on telephony.</i>	Yes
Billing Z Fold Mailer	Notices → Overdues	This report is very important in order to post the information to the database. This is necessary in order for items that are long overdue to switch to lost. You may select a different format than the “Z-fold Mailer” if you prefer, but you must run one type of Billing report from the list in the “Notices” folder. It is recommended that you run this report on the same day each week (eg: every	Yes

		<p>Wednesday morning).</p> <p>Note: After mailing the Billing Notice, if you receive no response from your patron, you can run the "Patron Billing Statement by Patron Code" if desired to generate another bill. See the "Other Useful Reports" section of this document for this report.</p>	
Lost Holds (Item-Specific Requests) by Library	Custom	See below.	Yes (smaller libraries can run monthly)
Lost Holds (Bib-level – 1 item)by Assigned Branch	Custom	These two reports are both VERY important to run. They show holds that are available <u>only at your library</u> that have not been filled.	Yes (smaller libraries can run monthly)
Unclaimed Holds by Assigned Branch	Custom	See below.	Yes (larger libraries can run daily)
Unclaimed Holds by Pickup Branch	Custom	<p>It is extremely important to run these two reports to determine which holds have gone "Unclaimed" at your library (have not been picked up in the timeframe they are meant to stay on the holds shelf – 10 days), as well as which of your items have gone unclaimed at other libraries.</p> <p>Note: If an unclaimed hold is lost the transacting library has one month beyond the unclaimed hold date to find the item, after which the owning library may consider it lost and invoice the transacting library for it. The owning library must invoice within one year of the item becoming an unclaimed hold. *Marigold libraries do not compensate other Marigold libraries for lost or damaged items*</p>	Yes (larger libraries can run daily)
Expired Requests	<i>Circulation → Holds</i>	This report lists expired hold requests for the specified library. It contains call number, author and title, barcode, patron name, phone number, patron library and expiration date.	No
Statistical Summary (Custom)	Custom	<p>A great report to run weekly or monthly to show your library board and also to see the recent activity at your library.</p> <p>Note: DO NOT use the "Statistical Summary" found in the "System" folder. It is important to specify the time within this report to be 12:00 a.m. – 11:59 p.m. in order to get accurate and consistent statistics.</p>	No

Monthly Reports

Name	Location	Description/Procedure	Required
Lost Items	Custom	<p>This report shows all of your lost items that have not been resolved. For more details, see the "Procedure for Lost Materials." Follow the procedure to reconcile these items.</p> <ul style="list-style-type: none"> ○ Check shelves ○ Follow-up with patrons ○ Invoice the appropriate libraries <p>[Note: A status of "Lost" indicates that the item was checked out and either the patron has informed the library that the item has been lost and a staff member manually changes the status from "Out" to "Lost" via the Patron Status workflow, or that the item has been long overdue at which point it automatically becomes "Lost" upon billing the patron and posting to the database].</p>	Yes
Missing Items	Custom	<p>This report shows you items currently "missing." Libraries should run this report and check their shelves for missing items.</p> <p><i>Missing items are automatically deleted after 1 year.</i></p> <p>[Note: A status of "Missing" indicates that the item is not on the shelf as expected. "Missing" is distinguished from "Lost" in that "Lost" indicates that the item was in fact checked out and did not return. "Missing" indicates that, to the extent the library can determine, the item has not circulated but cannot be found].</p>	Yes (smaller libraries may run semi-annually)
Expired Patrons	Public Services → Patron Services	Lists all patrons whose account will be expiring before a specified date from a specified library.	No
Claimed Items	Cataloguing → Items	Lists all patrons with claimed items from a specified library. It is very important that you check the shelves every month for these items to ensure they are not in your library since items will be considered Lost and deleted after 6 months. For more information see the Claimed to Lost Procedure on the Marigold Website..	Yes

In-Transit and Transferred Items	Custom	Identifies any items that have been in transit or transferred for over two months. Look on your library shelves and possibly call the sending library to check their shelves. Items that have been in-transit or transferred for over two months can be manually converted to missing. Missing items will automatically be deleted after one year. For more details, see the " Switching In-Transit and Transferred Materials to Missing " procedure which is available on the Marigold website.	Yes (smaller libraries can run every 2 months)
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Yearly Reports

Name	Location	Description/Procedure	Required
Annual Report	Custom	This report needs to be run in order to complete your Annual Report. It is also a useful report to run monthly to communicate statistics to your library board	Yes
Collection Value by Organization	Cataloguing → Item	This report shows the monetary value of the collections in your library so you know what your collection is worth for auditing and insurance purposes. It breaks down the value of each collection and gives a grand total of the entire collection.	No

Other Useful Reports

Name	Location	Description/Procedure	Required
Renewals over the limit – Other library's items	Custom	Identifies any items that belong to other libraries which have been renewed by your library beyond the limit.	No
Renewals over the limit – Your items		Identifies any libraries that are renewing your books over the renewal limit.	No
Item Circulation Statistics	Circulation	Lists number of items, checkouts, renewals and combined checkouts and renewals by material type for a given library within a given time frame.	No

Circ Analysis	Custom	Provides circulation statistics for a specified period of time, broken down by time of day which can be helpful in evaluating staffing.	No
Circulation by Collection Material type Analysis	Circulation	Shows number of circulations (check outs and renewals) and the percentage of total by collection code and then material type within a given time frame.	No
Circulation by Workstation	Circulation	Identifies your workstations and how much they each circulate.	No
In-House Use	Circulation	Reports the number of items used within a specified library, sorted by material type. Only relevant to libraries that keep track of in-house use through check-in. [Note: These counts are taken from the “Year-to-Date In-house use” and “Lifetime In-house use” counters within the item records. Both counters follow the year-end rollover schedule. If you desire a statistical total for the complete year, it must be run <i>prior to closing on the last day of the year</i> , as the “Year-to-Date” amount will reset back to zero at the beginning of each new year].	No
Local Hold Request & Item Counts by Branch	Circulation → Holds	This report can be used for collection development. It shows a list of items your patrons are requesting from other libraries that you may want to consider purchasing for your library.	No
Patron Cross Borrowing	Circulation	This is a handy report to see which patrons from other libraries are using your library.	No
Municipality Membership - MLS	Custom	Identifies which municipalities your library patrons live in. <i>Tip:</i> There is no option to list <i>ONLY</i> your library, but once the report is displayed, you can search the document for your library by clicking “ Edit ” → “ Find ” and then entering your library name and clicking forward through each occurrence of your library in the report.	No
Wandering Patron Notices	Custom	Useful in knowing which wandering patrons are using your library that have received overdues, fines, bills and/or combined notices. You will have to look into each account to get more details of which notice it was.	No
Notification Summary by Date	Custom	Allows you to go back to any date to find out whether a patron was notified about an item.	No

Patron Billing Statement by... ...Patron Barcode ...Organization	Custom	Generates an additional billing statement for an individual patron by barcode or a list of billed patrons for your organization. [Note: These two reports DO NOT post to the database].	No
Billed Patrons	Public Services → Patron Financial	Identifies patrons who have received a billing notice. The report includes basic item information and the amount owed by each patron. [Note: This report includes ALL patrons and there are no date range options so there may be MANY pages]	No
Delinquent Patrons	Circulation	Identifies patrons (name, phone, barcode) who have system blocks, free text blocks, or library-defined blocks on their records.	No
Patrons with messages	Public Services → Patron Services	Provides a snapshot of messages currently in patron accounts where the patron record has at least one message, read or unread. Includes patron names, message text, whether it has been read, the date the message was created, and the creator.	No
Fines and Fees Summary	Public Services → Patron Financial	Shows the total amounts for fines and fees transactions (eg. payments, waives, refunds, and charges), for a specified date range, according to transaction type.	No
Waived Fines	Public Services → Patron Financial	This shows a listing of all waived fines for a certain period of time with details.	No
Inter-Intra Library Loan Summary Report	Custom	Provides circulation statistics on items loaned out to and borrowed from other libraries, broken down by “Print”, “AV” and “ILL” (VDX items created “On-the-Fly” through check-out where “Interlibrary Loan” is selected from the “Material type” dropdown in the workflow.	No
Weeding Report – Simple with Collection Filter	Custom	Items on the list have not circulated in the current or previous year. You can choose the number of lifetime circulations when creating the report. <ul style="list-style-type: none"> ▪ Parameters: <ul style="list-style-type: none"> • Library: Select your library name from the dropdown. • Minimum Lifetime Circulation: Enter the minimum number of circulations (zero). • Maximum Lifetime Circulation: Enter the maximum number of circulations. 	No

		<ul style="list-style-type: none">• Publication Year before: Enter a year –only items that have been published prior to this date will appear on the report.• Collection: Select desired collection code from the dropdown. You can only select one collection at a time.▪ Once you have submitted the report parameters and the report is displayed, you will see a footnote included at bottom: Indicates what is NOT included in the report/status. (What IS included: “In”, “Claimed Returned”, “Claimed Never Had”, “Processing”, “Missing”, “Lost”) <p>Tip: When you go through the list of items on the report and are finding them on the shelf in order to (possibly) weed the item from your collection, if the items are not on the shelf, Put these items into a record set. When you do this, it will list the status of the item (“Missing”, “Lost”, etc.).</p> <p>[Note: If you search for an item and receive the message “Item record not found”, this means that the item has subsequently been deleted since the report was generated (e.g., A lost item deleted by headquarters). These items will also disappear from any record sets that they may have been in.]</p>	
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Please Note:

Marigold **does not recommend** the use of many of the stock or “canned” reports that are contained in the reporting module of Polaris. Many of these reports draw data from different sources than what is required by our complex consortium of regions and various member libraries.

At this time, we are unable to remove or suppress any reports and so, although you are free to explore the various reports available, we cannot guarantee the accuracy of many and we **only recommend the use of the reports listed in this document.**

Also, some seemingly similar reports may rely on different variables due to the complexity of the database structure and will consequently have differing results. We recommend that each user determine which sources and reports they prefer and utilize that **same source throughout the year** to ensure consistency for reporting purposes.