SEPTEMBER 2024

Leap Reports

**STAFF GUIDE**

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**REPORTS & NOTICES**

This document lists mandatory and recommended reports for member libraries available through the online reporting site. Included in the document for each report is a description, basic information on how it can be accessed, and the frequency with which each report should be run.

Please be aware that some seemingly similar reports have different variables due to the complexity of the database and will consequently have differing results. Many reports in the “Custom” section were written to extract data for a specific library and may not generate the data you believe it will. Unless a “Custom” report is recommended in this document, library staff should not use custom reports since the purpose of the report and what is being used to generate the data is unknown.

Each library manager should determine which reports provide the data being sought and use the same report throughout the year to ensure consistency. Please contact your Marigold Consultant for assistance in determining the best report to use for various purposes.

**To Access Reports:**

The web portal to access Polaris reports is called “SQL Server Reporting Services” and is located at <https://reports.tracpac.ab.ca>. You can also access this through Leap under Utilities.

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Once you load the site you will be prompted to enter your username and password. Your username is the same that you currently use to log on to Windows and Leap and will need to be entered in the format **MLSCAL\(username)**. Once you have logged into the site, select the Polaris folder.

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From there you can navigate through the report folders. Navigate by using the Back button in your browser, or you can click the breadcrumb links to go back to previous folders.

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If you have a report that you use often, clicking on the three dots next to the Name under Description will give you a popup that allows you to add it to your Favorites.

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For reports created by Polaris (non-Custom reports), you can discover more details on each report through a Polaris Help search.The Help search will ONLY provide results for Polaris-built reports, NOT for Custom reports.

* Before you open the Help function, identify the report you are looking for and its category as listed in the Polaris Reports categories.
* Ie. the “In-House Use” report, which is in the Circulation category.

The Help search can be found at <https://documentation.iii.com/polaris/7.5/>. You will need to change the version number in the URL based on the current version of Polaris that we are using. To find that, go to Help -> About in Leap. The pop-up box will indicate the current version.

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Once you are at the correct help documentation site, in the Search bar enter keywords such as “circulation” or “circulation reports” (you could also try searching the name of the report). Scroll through the results to find the information you are looking for.

**Exceptions:**

The Billing Z Fold Mailer and Overdues Z Fold Mailer MUST be run through Leap. Instructions for running these are under the Description/Procedure for these two reports further in this document.

**Scheduling Reports:**

It is possible to schedule reports to run on a specific schedule and email you the results, rather than having to manually run reports on a periodic basis.

Locate the report you want to schedule and click on the three dots next to the report name. This will open a menu where you will select “Subscribe”.

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In the next window, click on the “Edit Schedule” link to set the schedule for the report.

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In the next window:

* Select the frequency that you want the report to run (weekly, monthly, etc.)
  + When selecting weekly, it will ask which day of the week to run
  + When selecting monthly, it will ask which day of the month to run
* Set the start time to occur sometime between 10pm and 6am (this helps to prevent system congestion)

NOTE: If you only want to run a report for a set time frame (ie. the next 3 months), you can select the checkbox next to “Stop this schedule on” and select a date.

Click “Apply” to finish the schedule and return to the previous page. Complete the “Delivery Options” section with the email address(es) to send the report to. If the report has parameters, fill those out in the “Report Parameters” section. Click “Create Subscription” when you are finished.

NOTE: Reports that require you to select dates do not provide ‘relative dates’ so they will always run for the same time period. These types of reports are not good candidates for this process if you want a current ‘monthly stat report’ of some kind. You will need to run those manually each month.

**Modifying Scheduled Reports:**

Click on the gear in the upper right corner to expand the dropdown and select “My Subscriptions”.

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This will open a window where you can review your subscriptions, see the current status, when it was last run, and edit it as needed. You can also manually run the subscription, Enable/Disable, and Delete it.

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| --- | --- | --- |
|  | Suggested Schedule for Required Tasks (Large - Medium Libraries) | |
| Daily Reports (i.e. every day the library is open) | | **Weekly Reports** |
| * Daily Notification Summary * Hold Requests to Fill * Telephony Failures * Unclaimed Holds by Assigned Branch * Unclaimed Holds by Pickup Branch | | * Overdues Z Fold Mailer * Billing Z Fold Mailer * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level – 1 item) by Assigned Branch |
| Monthly Reports | | **Yearly Reports** |
| * Claimed Items * Damaged Items * Holds Alert Report by Branch – Publication Year * In-Transit and Transferred Items * Lost Items * Missing Items | | * Annual Report |

|  |  |  |  |
| --- | --- | --- | --- |
| Suggested Schedule for Required Tasks (Medium - Small Libraries) | | | |
| January | **February** | **March** | **April** |
| * Claimed Items * In-Transit and Transferred Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch * Lost Items | * Claimed Items * Lost Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch | * Claimed Items * In-Transit and Transferred Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch * Lost Items | * Claimed Items * Damaged Items * Lost Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch |
| May | **June** | **July** | **August** |
| * Claimed Items * In-Transit and Transferred Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch * Lost Items * Missing Items | * Claimed Items * Lost Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch | * Claimed Items * In-Transit and Transferred Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch * Lost Items | * Claimed Items * Damaged Items * Lost Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch |
| September | **October** | **November** | **December** |
| * Claimed Items * In-Transit and Transferred Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch * Lost Items | * Claimed Items * Lost Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch | * Claimed Items * In-Transit and Transferred Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch * Lost Items * Missing Items | * Claimed Items * Lost Items * Lost Holds (Item-Specific Requests) by Library * Lost Holds (Bib-level –1 item) by Assigned Branch |
| Daily Reports (i.e. every day the library is open):   * Hold Requests to Fill | | **Weekly Reports:**   * Daily Notification Summary * Telephony Failures * Overdues Z Fold Mailer * Billing Z Fold Mailer | |

**Mandatory Reports**

|  |  |  |
| --- | --- | --- |
| **Name** | **Location** | **Description/Procedure** |
| **Billing Z Fold Mailer** | Leap -> Utilities -> Print Notices -> Overdues -> Billing Z Fold Mailer | This report must be run weekly to post (update) the Polaris status for items that are long overdue to switch to “Lost.” It is recommended that you run this report on the same day each week (i.e. every Wednesday morning). Whether or not your library charges fines, this needs to be completed, or items will sit overdue permanently. Posting the Billing also ensures lost copy replacement charges are billed as required.  You may select a different paper format than “Z-fold Mailer”. Z-fold means the patron address is located on the paper to show in a window envelope if you use one. After mailing the Billing Notice, if you receive no response from your patron within a reasonable amount of time (e.g. one month), you can run the “Patron Billing Statement by Patron Code”, if desired, to generate another bill. See the “Optional Reports” section of this document for this report.  This report may come up blank for most libraries as patrons usually select automatic notification options such as phone or email. Regardless, this must be run to move the item through the Billing queue. |
| **Claimed Items** | Cataloging 🡪 Item | This report lists items patrons have declared they returned to the library (Claim Returned) or they never had (Claim Never Had).  Check the shelves every month for these items to ensure they are not in your library, otherwise the items will be considered Lost and can be withdrawn after 6 months. If you find the item, check it in. For more information see the **Claimed to Lost Procedure** on the Marigold website. |
| **Damaged Items** |  |  |
| **Name** | **Location** | **Description/Procedure** |
| **In-Transit and Transferred Items** | Custom | Identifies items assigned to your library that have had a status of “In-Transit” or “Transferred” for over two months. Check your library shelves or contact the sending library so they can check their shelves. If you find the item, check it in.  Items owned by your library that have been in-transit or transferred for over two months should be manually converted to missing. Missing items will automatically be deleted and withdrawn in one year. For more details, see the **Switching In-Transit and Transferred Materials to Missing Procedure** on the Marigold website. |
| **Lost Holds (Bib-level – 1 item) by Item Assigned Branch** | Custom | Generates a list of active bib record level holds where your library owns the only item attached to the bib record that can fill the hold.  To fill the hold, pull the item from your shelf and Check In the item. If you can’t find the item, mark it as Missing. |
| **Lost Holds (Item-Specific Requests) by Library** | Custom | Generates a list of active item level holds where your library is the only library that can fill the hold.  To fill the hold, pull the item from your shelf and Check In the item. If you can’t find the item, mark it as Missing. |
| **Lost Items** | Custom | Lists lost items belonging to your library that have not been resolved. For the procedure and more details, see the **Procedure for Lost Materials** on the Marigold website*.*  “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 changed the status from “Out” to “Lost” via the Patron Status work form, or that the item has been long overdue at which point it automatically becomes “Lost” upon billing the patron and posting to the database. |
| **Missing Items** | Custom | This report shows items assigned to your library with a status of “Missing”. Run this report and check shelves for missing items. If you find the item, complete a Check In. Missing items are automatically changed to withdrawn after 1 year.  “Missing” is different from “Lost”. While “Lost” indicates the item was checked out and did not get checked in again, “Missing” indicates that the item has not circulated and cannot be found. |
| **Name** | **Location** | **Description/Procedure** |
| **Overdues Z Fold Mailer** | Leap -> Utilities -> Print Notices -> Overdues -> Overdues Z Fold Mailer | This report must be run weekly to post (update) patron accounts with mail notification to indicate that an item is overdue. It is recommended that you run this report on the same day each week (i.e. every Wednesday morning). Whether or not your library charges fines, this needs to be completed, or items will sit overdue permanently. This report only produces results for mail notification patrons.  You may select a different paper format than “Z-fold Mailer”. Z-fold means the patron address is located on the paper to show in a window envelope if you use one.  This report may come up blank for most libraries as patrons usually select automatic notification options such as phone or email. Regardless, this must be run to move the item through the Overdues queue, and then it will enter the Billing queue. |
| **Hold Requests to Fill** | Circulation -> Holds | Shows all items which are requested by your patrons as well as those at 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. ***Note:*** *This report can also be run in Leap under Utilities -> Picklist Processing* |
| **Unclaimed Item Assigned Holds by Assigned Branch** | Custom | Generates a list of holds on your library’s items that have gone to “Unclaimed” status. Unclaimed means the hold was not picked up by the patron within 10 days.  For items Unclaimed that are on your library shelves, you can check the item back in to Polaris or you may choose to contact the patron first.  If an unclaimed hold is lost, the transacting library (pickup 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 (do not invoice other Marigold libraries). The owning library must invoice within one year of the item becoming an unclaimed hold. |
| **Unclaimed Holds by Pickup Branch** | Custom | Generates a list of holds that have gone to “Unclaimed” status where your library is the pickup location. Unclaimed means the hold was not picked up by the patron within 10 days.  For items Unclaimed that are on your library shelves, you can check the item back in to Polaris or you may choose to contact the patron first.  If an unclaimed hold is lost, the transacting library (pickup 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 (do not invoice other Marigold libraries). The owning library must invoice within one year of the item becoming an unclaimed hold. |

**Recommended Reports**

|  |  |  |
| --- | --- | --- |
| **Name** | **Location** | **Description/Procedure** |
| **Daily Notification Summary** | Custom | Shows all the notices sent out with the patron name and the status. If a patron wants to confirm how they were notified, you can double check that information with this report. |
| **Expired Patrons** | Public Services 🡪 Patron Services | Lists all patrons whose account will be expiring before a specified date from a specified library. |
| **Expired Requests** | Circulation 🡪 Holds | This report lists expired hold requests for the specified library. It contains call number, author, title, barcode, patron name, phone number, patron library, and expiration date.  You may want to view the bib record and attached items to see if there is a reason why the hold was not filled. If there is no obvious reason, you may wish to re-place the hold. If you cannot see a reason and the item is not owned by your library, still re-place the hold but please email an inquiry to your Marigold Consultant with the patron barcode and an item barcode or bib record control number so they can investigate. |
| **Telephony Failures** | Custom 🡪 Telephony | Telephony is the notification system TRAC uses which automatically phones patrons if patrons select phone instead of mail, email, or TXT as their notification method for their patron account. This report tells you if any phone notification failed and will usually come up blank. You may wish to manually phone the patron and verbally deliver the notification instead if this has happened.  ***Note:*** *Not all libraries have Telephony turned on. If you are unsure if you do or not, please ask your consultant.* |

**Annual Report**

|  |  |  |
| --- | --- | --- |
| **Name** | **Location** | **Description/Procedure** |
| **Annual Report** | Custom | **Municipal libraries must use the data from this report to complete the Municipal Affairs Public Library Services Branch Annual Report.** TRAC has custom-built the report to generate precisely the statistics that PLSB wants. This report is updated to reflect new data PLSB may be requesting.  This report is only available in January and February for annual reporting. |

**Optional Reports**

|  |  |  |
| --- | --- | --- |
| **Name** | **Location** | **Description/Procedure** |
| **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.  This report includes **ALL patrons** and no date range, so there may be many pages. |
| **Circ Analysis** | Custom | Provides circulation statistics for a specified date range, broken down by time of day, which can be helpful in evaluating staffing needs. |
| **Circulation by Collection Material Type Analysis** | Circulation | Shows number of circulations (checkouts and renewals) and the percentage of the total by collection code and then material type within a given time frame. |
| **Delinquent Patrons** | Circulation | Identifies patrons (name, phone, barcode) who have system blocks, free text blocks, or library-defined blocks on their records. |
| **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. |
| **Holds Alert Report by Branch – Publication Year** | Custom -> Marigold Library System | 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. |
| **In-House Use** | Circulation | Only relevant to libraries that keep track of in-house use through check-in.  If your library has material that is only used for in-house circulation, such as daily newspapers or coffee table books, and the library completes a check-in of either the item barcode or a generic in-house barcode in a set number of times each week or month to track in-house circulation, then this reports the number of items used at your library, sorted by material type. If you want more information about tracking In-House Use, please contact your Marigold Consultant.  The counts from this report are taken from the “Year-to-Date In-house Use” and “Lifetime In-house Use” counts within the item records. Both counts follow the year-end rollover schedule. To generate a year-end total, this report must be run ***prior to closing on the last day of the year***, as the “Year-to-Date” amount will reset back to zero at the beginning of each new year**.** |
| **Name** | **Location** | **Description/Procedure** |
| **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”.  The Total column for each section is not the total of each of the other columns. The Total column also includes Loaned and Borrowed material types that are not counted in the AV and Print Columns, such as equipment, games, or toys. Use the Total column if you are reporting **total** ILL loaned and borrowed. |
| **Item Circulation Statistics** | Circulation | 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 library and material type. |
| **Municipality Membership - MLS** | Custom | Identifies which municipalities your library patrons live in.  Since this report is sorted by municipality and not the library, your library may appear several times on several pages in this report. Residents in Marigold can obtain a TRAC card at any Marigold library of their choosing following local policy. You may have to manually total the patron counts to get the number of cardholders from various municipalities. |
| **Notification Summary by Date** | Custom | Allows you to go back to any date to find out whether a patron was notified about an item. Lists the type of notification. |
| **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. This should only be used if you receive no response from your patron on the original Billing Notice within a reasonable amount of time (e.g. one month).  These two reports do not post to the database. You must still complete the Billing notices report. |
| **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. |
| **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. |
| **Waived Fines** | Public Services 🡪 Patron Financial | This shows a listing of all waived fines for a certain period of time with details. |

**Statistical Summary – Optional Monthly Report**

|  |  |
| --- | --- |
| **There are two Statistical Summaries in the reports section. The reports do not match and are not intended to, as they extract different data. Choose which version better suits your needs and always use the same report. Starred headings below show which sections do NOT pull the same information.**  The Polaris “Canned” report located in the System category was built by Polaris. The other Statistical Summary is in the Custom category and was built by TRAC. Both reports provide snapshots of collection counts, circulation statistics, records added and deleted, and other items. If you pull this report monthly, use the same time period e.g. 12:00 a.m. – 11:59 p.m. for consistent statistics.  The Polaris Help tool in the staff client will provide information on items not listed here because for those items, the Custom version matches the Polaris “Canned” version. In the Help tool, click on the “Index” tab and search “Statistical Summary” to view definitions for statistics not described below. | |
| **Statistical Summary - Polaris “Canned” Report**  **Located in System folder/category** | **Statistical Summary – Custom Report**  **Located in Custom folder/category** |
| **Record Counts**  **Total Item Records**  - Item Status is not Withdrawn  - Record Status is Final  - Library is Assigned Branch  **Items Withdrawn\*\*\***  - Find all items with status Withdrawn  - Library is Assigned Branch  - Item status was changed between start and end of selected term  **Total Patrons**  - Patron organization is library  **Circulation Statistics**  **Checkouts**  - Where Transaction date is between start and end of selected term  - Find all items checked out during date range  - Library checked out the item  **Checkins**  - Where Transaction date is between start and end of selected term  - Find all items checked in during date range  - Library checked in the item  **Overdue Items Checked In**  - Find all checkins during date range where item is overdue  - Library checked in Item  **Holds Placed\*\*\***  - Find all Holds placed during date range  - Reports holds placed at Library Workstation(s) only  **Holds Satisfied**  - Find all Holds filled during date range  - Library filled hold  **Holds Cancelled\*\*\***  - Find all holds Cancelled during date range  - Library was pickup location  - Hold placed through PAC  **Borrowers**  - Find all checkouts during date range  - Count Unique Patrons  **Records Added and Deleted**  **Item Records Added\*\*\***  - Find all Items added during date range  - Library added item  - Item is Assigned to Library  **Item Records Deleted**  - Find all Items deleted during date range  - Library deleted item  **Item Records Added By Other\*\*\***  - Find all Items added during date range  - Assigned branch is Library  - Library did not add Item  **Item Records Deleted By Other\*\*\***  - Find all Items deleted during date range  - Assigned branch is Library  - Library did not delete item  **Patron Record Added**  - Find all Patrons created during date range  - Patron assigned branch is library  - Library added patron  **Patron Record Deleted**  - Find all deleted Patrons during date range  - Patron assigned branch is library  - Library deleted patron  **Financials**  **Net\*\*\***  -Money collected minus refunds  **PAC Statistics**  **PAC Holds Placed\*\*\***  - Find all Holds Placed during date range  - Pickup location is Library  - Hold placed through PAC  **PAC Holds Cancelled\*\*\***  - Find all Holds Cancelled during date range  - Pickup location is Library  - Hold cancelled through PAC | **Record Counts**  **Total Item Records**  - Item Status is not Withdrawn  - Record Status is Final  - Library is Assigned Branch  **Items Withdrawn\*\*\***  - Find all items with status Withdrawn  - Assigned branch is library  **Total Patrons**  - Patron organization is library  **Circulation Statistics**  **Checkouts**  - Where Transaction date is between start and end of selected term  - Find all items checked out during date range  - Library checked out the item  **Checkins**  - Where Transaction date is between start and end of selected term  - Find all items checked in during date range  - Library checked in the item  **Overdue Items Checked In**  - Find all checkins during date range where item is overdue  - Library checked in Item  **Holds Placed\*\*\***  - Find all Holds placed during date range  - Library placed hold at workstation  - Not placed in PAC  **Holds Satisfied**  - Find all Holds filled during date range  - Library filled hold  **Holds Cancelled\*\*\***  - Find all holds Cancelled during date range  - Library Cancelled hold  **Unique Patrons**  - Find all checkouts during date range  - Count Unique Patrons  **Items Borrowed\*\*\***  ADDS TOGETHER  - All checkouts during date range  - Item Assigned Branch is not Library  - Library Checked out item  AND  - All checkouts during date range  - Material type is Interlibrary Loan  - Library Checked out item  **Items Lent**  - Find all checkouts during date range  - Item Assigned Branch is Library  - Item not checked out by Library  **Records Added and Deleted**  **Item Records Added By Branch\*\*\***  - Find all Items added during date range  - Library added Item  **Item Records Deleted By Branch\*\*\***  - Find all Items deleted during date range  - Assigned branch is Library  - Library deleted item  **Patron Record Added by Branch**  - Find all Patrons created during date range  - Patron assigned branch is library  - Library added patron  **Patron Record Deleted By Branch**  - Find all deleted Patrons during date range  - Patron assigned branch is library  - Library deleted patron  **The top section where it lists “Patrons” is as of the day the report is run.** Only the Circulation statistics are based on the dates selected for the report. If you run the reports later for previous months, the top sections will be identical. This report is not designed to show Patron changes over time. There is no way for Polaris to know when a patron has been added or removed (this is not tracked).  **Financials**  **Net\*\*\***  -New charges minus money collected  **PAC Statistics**  **PAC Renewals**  - Find all Checkouts during date range  - Find items that were renewed at checkout  - item was checked out through PAC  - Library checked out Item  **PAC Holds Placed\*\*\***  - Find all Holds Placed during date range  - Patron assigned branch is library  - Hold placed through PAC  **PAC Holds Cancelled\*\*\***  - Find all Holds Cancelled during date range  - Patron assigned branch is library  - Hold cancelled through PAC |

**Polaris Version Custom Version**

