



Polaris Reports you can or should use

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The Basics



Slides will be available at ohiug.org



CLC members can get details info:

<https://discourse.clcoho.org/c/report-definitions/25>



Report information available to all: <https://reportdefs.clcoho.org/>

How to run reports

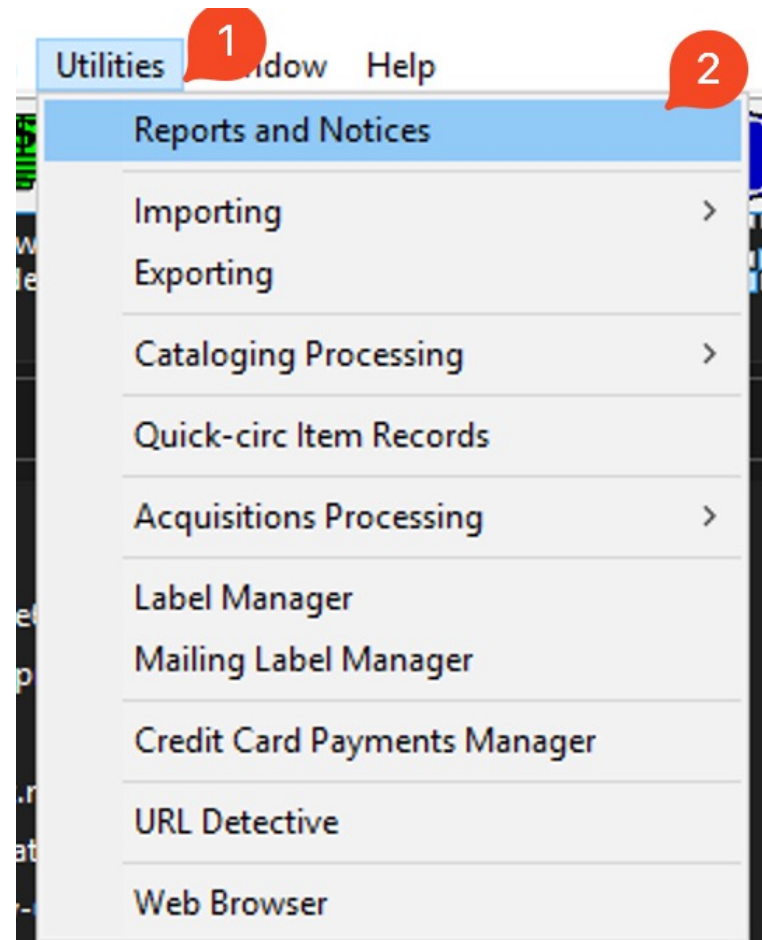


Desktop client



Web browser / Leap

Desktop Client



Leap Today – Yes you CAN run reports

<https://prodreports.clcdpc.org/reports/browse/>

<https://discourse.clcohoio.org/t/1467>

[Better than the Desktop Client!](#)

New options Leap version 7.5 release Q2 2024



Customizable Report Menu Options in Leap

  12

 SAMANTHA QUELL | Posted on January 10

Description:

Links will be added to the Leap menu options for reporting tools like SimplyReports, Reporting services (no passthrough authentication at this time). These links will support basic customization so they be repurposed if needed.

Value:

Allows staff to link to reporting tools without needing to save bookmarks. Customization will allow staff who don't need/want the report links to provide links to other external resources.

See a report you like?

Request a report definition file .RDL

Email clcdpc@clcoho.org

[See this presentation for info on loading RDLs](#)

Check with Innovative support on loading RDLs

Types of Reports



Types of records

Authority Records

Bibliographic Records

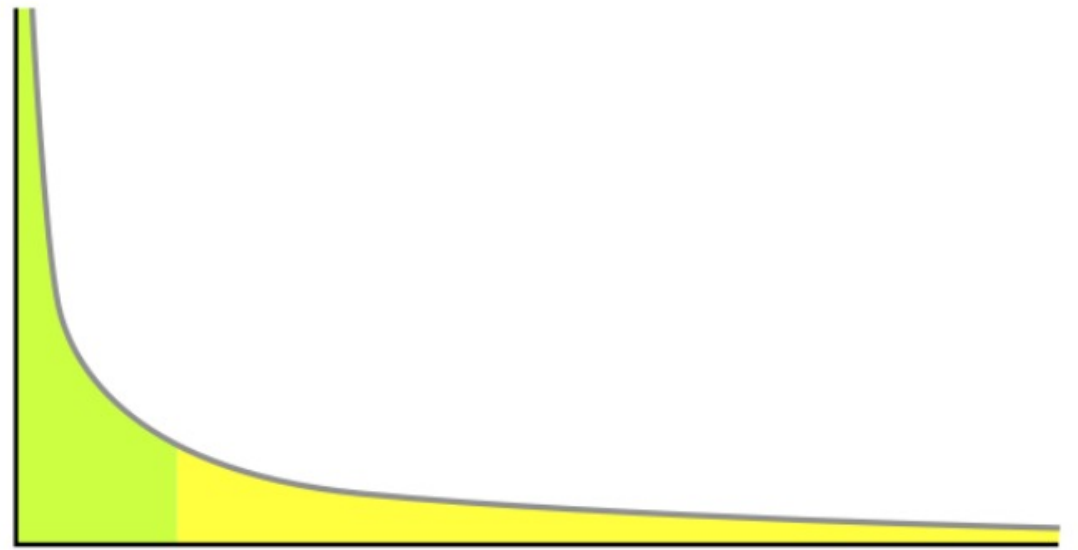
Item Records

Patron Records

Staff Records



Reports
seem to
follow the
“power law”



An example power-law graph that demonstrates ranking of popularity. To the right is the **long tail**, and to the left are the few that dominate (also known as the **80–20 rule**).

Approximate Record Counts

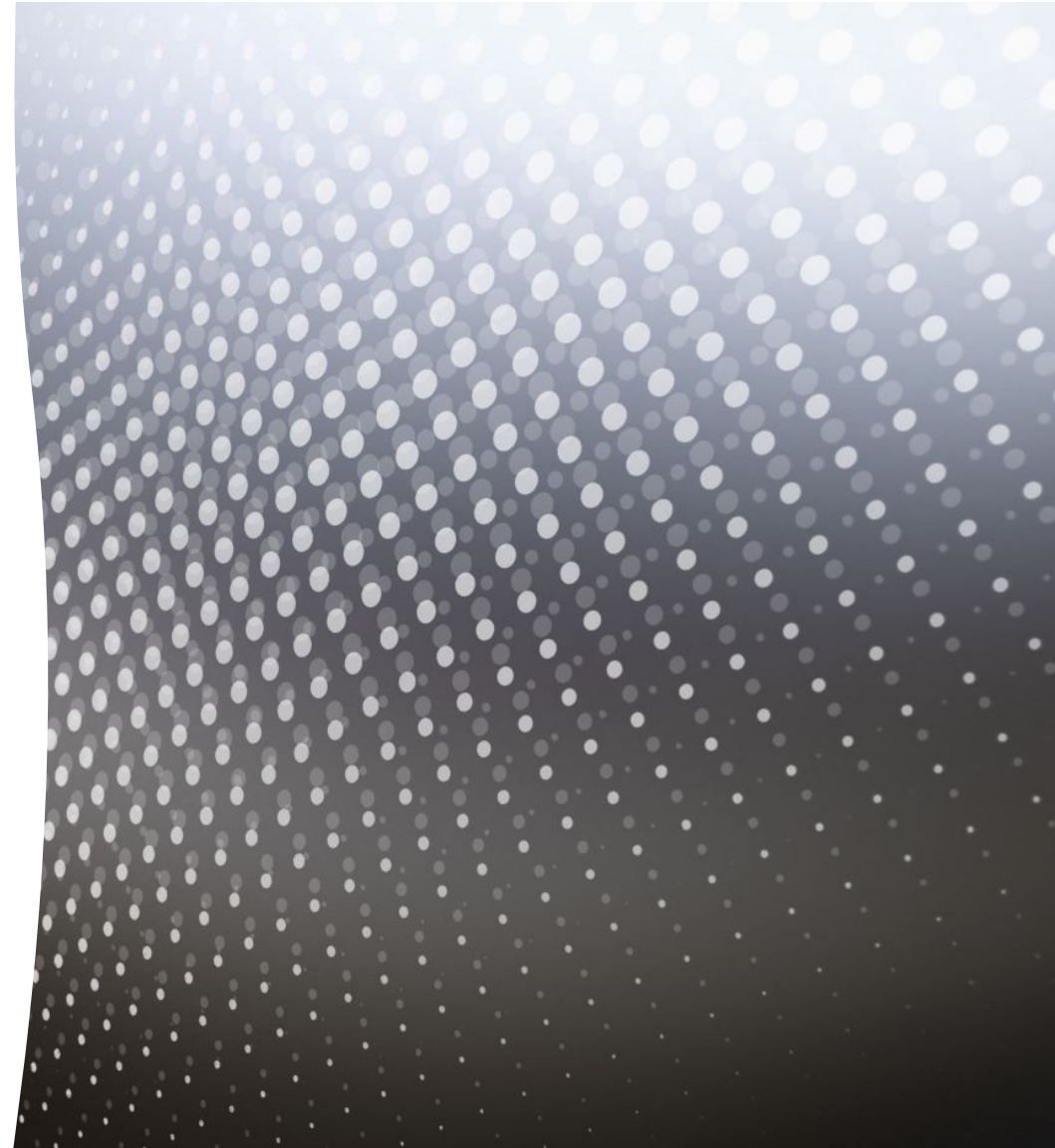
Authority Records = 1.2 million

Bibliographic Records = 1 million

Item Records = 5.1 million

Patron Records = 1 million

Staff Records = 1,500



Reports about
item records



Types of Item Record Reports



Buying items



Discarding items



Other “fun” stuff

Holds Ratio Report

- Custom CLC Report

Filter by

- Library
- Ratio of Library owned Items to library registered Patron holds
- Minimum Holds
- Bib Type of Material
- Exclude Bibs

Output

- Title information
- Number of consortia items
- Number of consortia holds
- Library owned items
- Library registered patrons

library ratio limit
 minimum holds Types of Material
 exclusion record set

1 of 2 ? Find | Next

Hold Ratio Report

System Items	System Holds	Assigned Branch	Ratio	Items	Library Patron Holds	Pickup Holds	Title	Author	ISBN	UPC	Pub Year
+14	20		2.00	0	2	2	Pirate Looks At Fifty	Buffett Jimmy	9780679435273		1998
+2	3		3.00	0	3	2	Soft Rain A Story Of The Cherokee Trail Of Tears	Cornelissen Cornelia	9780440412427		1998
+33	29		2.00	0	2	2	One Piece Vol 01(1)98 Romance Dawn	Oda Eiichiro 04(1975)99	9781591163640		2003
+1	20		2.00	0	2	2	Super Mario Galaxy 01(2)99 Wii			045496901905	2010
+2	91		2.00	0	2	2	Whatever The 02(90)99S Pop & Culture Box			081227971625	2005
+4	14		2.00	1	2	2	Invisible Thread The True Story Of An 02(11)99 Year Old Panhandler A Busy Sales Executive And An Unlikely Meeting With Destiny	Schroff Laura	9781410447869		2012
		FCDL		1							

Expand the rows by clicking the “+” icon

Bibs with holds but no items

- Custom CLC report
- No Filters

Output

- Patron barcode
- Patron registered library
- Bib Control Number

Bibs with Holds but No Items

This report shows any holds requests on bibs/titles where there are no item records associated with the bib record. Please search for this title and see if there is another record in the catalog that could fulfill the request and then **ask your cataloger to MERGE the two bib records**. Otherwise, you may want to cancel the hold or purchase another copy of the item. The library listed in the library column is the PATRON's library. This is the location that should correct the request.

Patron Barcode	Bib ID	Library
[REDACTED]	1344052	BEX
[REDACTED]	3757114	BEX
[REDACTED]	1818576	BEX
[REDACTED]	1334368	BEX
[REDACTED]	1926718	BEX
[REDACTED]	3618925	BEX
[REDACTED]	3734024	BEX

Requested Items Your Library Doesn't Own

- Custom CLC report

Filters

- Patron's Registered Library
- Minimum # of overall requests
- Item Collection Code
 - (any item record)

Output

- Title Information
- Bib Call Number
- Total Number of items
- Total Number of requests

library

Minimum # of holds

collections



of 1



Find | Next

Requested Items Your Library Doesn't Own

Bib ID	Title	Author	Call #	ISBN	Pub Year	Type Of Material	Items	Hold
3830452	The Heaven & Earth Grocery Store : a novel	McBride, James, 1957- author.	813/.6	0593684141	2023	Audio Book on CD	13	4
3809222	The Exchange	Grisham, John author.		978059360747 3	2023	Audio Book on CD	20	2
3802094	Bright lights, big Christmas	Andrews, Mary Kay, 1954- author.		978125090246 7	2023	Audio Book on CD	12	2

TDM	729.89	915.51	185.62	▲25.43%
HUM	749.73	924.29	174.56	▲23.28%
DMW	833.72	1004.01	170.29	▲20.43%
YZJ	903.49	1127.46	223.97	▲24.79%
GLY	982.07	1219.39	237.32	▲24.17%
VDA	113.74	143.41	29.67	▲26.09%
UVV	468.08	535.41	67.33	▲14.38%
HJS	545.49	659.05	113.56	▲20.82%
EGC	566.96	664.69	97.73	▲17.24%
FLR	660.27	745.28	85.01	▲12.88%
UVD	155.59	181.57	25.98	▲16.70%
QUV	440.55	540.21	99.66	▲22.62%
HZT	285.51	344.98	59.47	▲20.83%
PCW	811.44	1029.66	218.22	▲26.89%
AIK	361.77	451.39	89.62	▲24.77%
ZJJ	858.36	994.57	136.21	▲15.87%
RHJ	894.79	1046.68	151.89	▲16.97%
VDV	425.08	509.95	84.87	▲19.97%

PPJ	912.63	1038.36	125.73	▲13.78%
UAO	1309.55	1655.62	346.07	▲26.43%
DAO	1295.17	1641.66	346.49	▲26.75%
PNR	654.33	775.84	121.51	▲18.57%
77M	111.55	134.22	22.67	▲20.33%
ZGK	391.59	491.48	99.89	▲25.51%
BNY	969.21	1130.65	161.44	▲16.66%
SOM	735.44	913.39	177.95	▲24.20%
TDQ	1323.91	1646.42	322.51	▲24.36%
015	543.42	667.24	123.82	▲22.79%
77A	145.11	182.16	37.05	▲25.54%

When a report isn't a report

Remember this slide (Leap Reports)?

<https://prodreports.clcdpc.org/reports/browse/>

<https://discourse.clcoho.org/t/1467>

Better than the Desktop Client!

Accessing reports like web pages

prodreports.clcdpc.org/reports/browse/Polaris

CLC SQL Server Report Server

★ Favorites Browse

Polaris

Home > Polaris

<input type="checkbox"/>	Type	Name ^	Description	Size	Modified date
<input type="checkbox"/>		Acquisitions	...		May 18, 2017 11:07:23 AM
<input type="checkbox"/>		Cataloging	...		May 20, 2012 8:15:38 PM
<input type="checkbox"/>		Circulation	...		Feb 11, 2021 2:00:31 PM
<input type="checkbox"/>		Custom	...		Oct 27, 2022 2:00:30 PM
<input type="checkbox"/>		Notices	...		Dec 21, 2015 10:06:43 AM
<input type="checkbox"/>		PAC	...		May 12, 2011 11:37:00 PM
<input type="checkbox"/>		Public Services	...		May 12, 2011 11:37:10 PM
<input type="checkbox"/>		Serials	...		May 12, 2011 11:37:19 PM
<input type="checkbox"/>		System	...		Dec 14, 2014 1:12:13 AM
<input type="checkbox"/>		Polaris	...	457 B	Jan 26, 2019 8:05:15 PM



Our most used
report is...

Item Counts by
ISBN or UPC



input library

View Full Item Details True False

of 1

 Find | Next

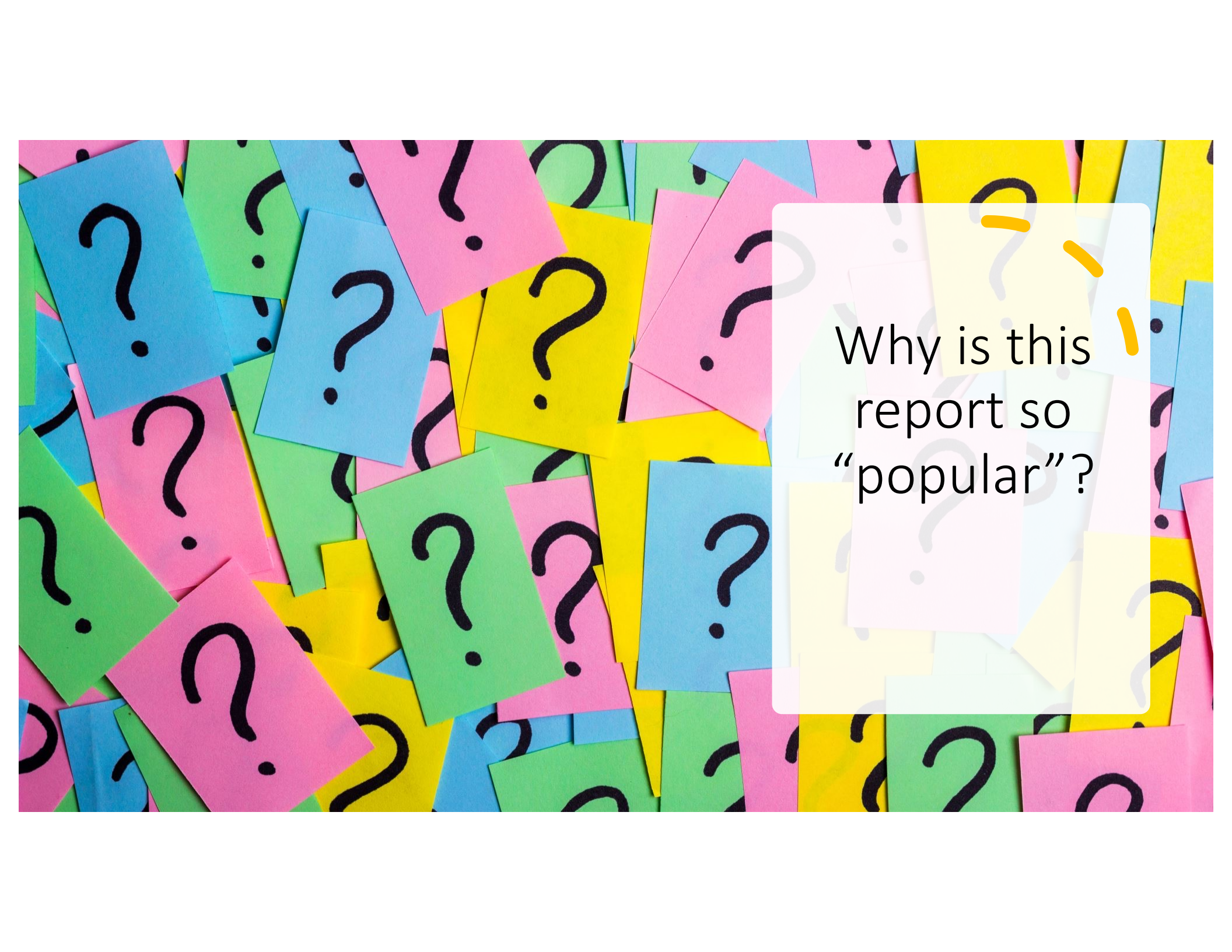
Item Counts by ISBN or UPC

Input String: 031398221074

Titles

Ex machina	Catalog Link
Consortium Items:	24
Consortium Holds:	1
Local Items:	4
Local Holds:	0
Total Items:	28
Total Holds:	1
YTD Circ:	151
YTD In-House Use:	0
Prev Year Circ:	185
Prev Year In-House Use:	2
Lifetime Circ:	10186
Lifetime In-House Use:	39

Assigned Branch	Item Status	Items	Barcode	First Available Date	Last Checkout Date	YTD Circ Count	YTD In-House Count	Prev Year Circ Count	Prev Year In-House Use Count	Lifetime Circ Count	Lifetime In-House Use Count
☐ CML Columbus Main Library	Total	1		05/16/2019	05/16/2022	0	0	2	0	60	4
	☒ Lost	1		05/16/2019	05/16/2022	0	0	2	0	60	4
☐ CML Hilltop Branch	Total	2		05/16/2019	10/19/2020	0	0	8	0	103	6
	☒ Lost	2		05/16/2019	10/19/2020	0	0	8	0	103	6
☐ CML Karl Road Branch	Total	1		05/16/2019	10/04/2023	15	0	16	2	77	3
	☒ In	1		05/16/2019	10/04/2023	15	0	16	2	77	3
Total		4				15	0	26	2	240	13



Why is this
report so
“popular”?

Book ordering interface

The screenshot shows a web browser window at <http://ts3d.informata.com/TS3/admin.jsp>. The user is logged in as Anne Reilly. The page title is "title source 3" with the Baker & Taylor logo. A navigation bar includes links for home, search, carts, customer service, FirstLook, and CAT. A left-hand "Admin" menu lists various settings, with "ISBN Lookup Setup" selected. The main content area is titled "ISBN lookup Setup" and contains a warning message: "This feature is enabled whenever one or more of the strings below contain values. To disable simply delete all fields and hit [Update]. Be sure worked for other customers. If additional help is required, please contact Product Support." Below this is a section for "ISBN Lookup Strings to be completed by Administrator" with three input fields: "URL:" containing a long URL, "Index:" containing "/?q=", and "Suffix:" which is empty. At the bottom, there are radio buttons for "ISBN Lookup Links Displayed:" with "ISBN" selected. "Update", "Cancel", and "Test ISBN" buttons are at the bottom of the form.

Logout You are logged in as Anne Reilly

title source 3

home search carts customer service FirstLook CAT

Admin

- » General Information
- » Users
- » ISBN Lookup Setup
- » Vendors
- » Accounts
- » Discounts
- » MARC Profile List
- » DNE
- » Duplicate Check
- » Grid Options
- » Cart Groups
- » Notes Concatenation

ISBN lookup Setup

This feature is enabled whenever one or more of the strings below contain values. To disable simply delete all fields and hit [Update]. Be sure worked for other customers. If additional help is required, please contact Product Support.

ISBN Lookup Strings to be completed by Administrator

URL:	<input type="text" value="https://reports.clcoho.org/ReportServer/Pages/ReportViewer.aspx?/Polaris/Custom/~Tech+Services/Item+Counts+by+ISBN+or+UPC&libra"/>
Index:	<input "="" type="text" value="/?q="/>
Suffix:	<input type="text"/>


ISBN Lookup Links Displayed: ISBN ISBN-10 Both ISBN and ISBN-10

Update Cancel Test ISBN

Which typically brings you to the PAC

catalog.clcohoio.org/polaris/search/title.aspx?ctx=85.1033.0.0.16&pos=1&cn=2037780

Language ▾ Large Text



Librar

HOME HOURS CALENDAR RESERVE A ROOM NEWSLETTER

LIBRARY INFO SEARCH MY

RETURN TO LIST DISPL



2015

Title: **Ex machina** / Universal Pictures Internation: ; produced by Andrew MacDonald and Allk and written by Alex Garland.

Format: DVD, Videorecording, Projected Medium, Vis

Publisher, Date: Santa Monica, California : Lionsgate, [2015]

Description: 1 videodisc (108 min.) : sound, color ; 4 3/4 ir digital optical surround 5.1 Dolby Digital video file DVD video

Summary: Caleb, a 24-year-old coder at the world's larg

Availability

Call Number	Shelf Location	Status	Type
▼ Bexley Public Library (1 of 1 available)			
▼ DVD			
Ex machina		In	Video R / TV-MA
▼ CML Karl Road Branch (1 of 1 available)			
▼ DVD			
DVD Ex		In	Video R / TV-MA
▼ Delaware Columbus State Community College Annex (1 of 1 available)			
▼ DVD			
DVD SCIFI EX		In	Video R / TV-MA
▼ Delaware County District Library Orange Branch (1 of 1 available)			
▼ DVD			
DVD SCIFI EX		In	Video R / TV-MA
▼ Delaware County District Library Ostrander Branch (1 of 1 available)			
▼ DVD			
DVD SCIFI EX		In	Video R / TV-MA

Remember...
Reports =
Web pages

prodreports.clcdpc.org/reports/browse/Polaris

CLC SQL Server Report Server

★ Favorites Browse

Polaris

Home > Polaris

<input type="checkbox"/>	Type	Name ^	Description	Size	Modified date
<input type="checkbox"/>		Acquisitions	...		May 18, 2017 11:07:23 AM
<input type="checkbox"/>		Cataloging	...		May 20, 2012 8:15:38 PM
<input type="checkbox"/>		Circulation	...		Feb 11, 2021 2:00:31 PM
<input type="checkbox"/>		Custom	...		Oct 27, 2022 2:00:30 PM
<input type="checkbox"/>		Notices	...		Dec 21, 2015 10:06:43 AM
<input type="checkbox"/>		PAC	...		May 12, 2011 11:37:00 PM
<input type="checkbox"/>		Public Services	...		May 12, 2011 11:37:10 PM
<input type="checkbox"/>		Serials	...		May 12, 2011 11:37:19 PM
<input type="checkbox"/>		System	...		Dec 14, 2014 1:12:13 AM
<input type="checkbox"/>		Polaris	...	457 B	Jan 26, 2019 8:05:15 PM

input library

View Full Item Details True False

Navigation icons: back, forward, 1 of 1, refresh, zoom (100%), save, print, search (Find | Next)

ISBN or UPC goes here supplied by ordering company website

Item Counts by ISBN or UPC

Input String: 031398221074

Titles

Ex machina [Catalog Link](#)

Consortium Items:	27	Consortium Holds:	1
Local Items:	1	Local Holds:	0
Total Items:	28	Total Holds:	1
YTD Circ:	151	YTD In-House Use:	0
Prev Year Circ:	185	Prev Year In-House Use:	2
Lifetime Circ:	10186	Lifetime In-House Use:	39

Assigned Branch	Item Status	Items	Barcode	First Available Date	Last Checkout Date	YTD Circ Count	YTD In-House Count	Prev Year Circ Count	Prev Year In-House Use Count	Lifetime Circ Count	Lifetime In-House Use Count
Pickerington Public Library	Total	1		07/16/2015	06/22/2023	4	0	0	0	58	0
	In	1		07/16/2015	06/22/2023	4	0	0	0	58	0
Total		1				4	0	0	0	58	0

Throw out your old PAC
ordering links and point to
a report instead!



Another "faux" report

Invoice Export Report for Software Solutions

- Custom CLC report
- **Filter by:** Library
- Supplier record “Financial External ID” field = Vendor
- Fund record “External Name” field = Description
- Fund record “Alternative Name” field = AccountNumber
- SchedulePayDate is calculated based on the day the report is ran

Output

- Invoice information from EDI files
- Allows for direct import into accounting software
- Must download as CSV or schedule to email CSV file
- Can be adapted to other accounting systems

View the report & then download as CSV

CSV (comma delimited)

1 of 2 ? 100%

PONumber	POLine	Vendor	Description	AccountNum
2023-46163		I00050	Fiction-Youth	101-0120-54
2023-46163		I00050	Fiction-Youth	101-0120-54
2023-46163		I00050	Fiction-Youth	101-0120-54
2023-46163		I00050	Fiction-Youth	101-0120-54
2023-46163		I00050	Fiction-Youth	101-0120-54
2023-46163		I00050	Fiction-Youth	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54
2023-46167		I00050	Nonfiction- Adult	101-0120-54

Word

Excel

PowerPoint

PDF

TIFF file

MHTML (web archive)

CSV (comma delimited)

XML file with report data

Data Feed

TXT (Pipe delimited)

CSV No Header

Getting rid of
items



Zero Circulation Report

- Adapted from CML report

Filter

- Branch(es)
- Collection Code(s)
- Call Number range
- Days since last circ

- Potential weeding candidates
- Item level information
- Shows last circ date
- Shows number of circs

Select Assigned Branch(es) to report on Select Collection(s) to report on

Enter the starting callnumber NULL Days since last circulation

Enter the ending callnumber NULL

[View Repo](#)

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 of 2 ?
 >
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↺
↻

📄
🖨
 Find | Next

**Items with Zero Circulation for 1 year
as of 10/26/2023**

Item Call Number	Item Barcode	MARC Title	MARC Author	YTD Circ Count	Prev Yr Circ Cnt	Lifetime Circ Cnt	Item First Available Date	Pub Year	Last Checkout Date	Assigned Collection	Assigned Branch	Item Status
	mfp88	George Washington : the founding father	Johnson, Paul, 1928-	0	2	17	4/4/2014	2005	1/23/2022	Biography	BPL	In
	MI2M1	The gamut	Reed, Helen.	0	1	10	4/4/2014		6/18/2022	Biography	BPL	In
B	mipo4	Drama high : the incredible true story of a brilliant teacher, a struggling town, and the magic of theater	Sokolove, Michael Y.	0	0	14	4/4/2014	2013	1/11/2019	Biography	BPL	In
B	DYLAN, Bob	mhhc6	Bob Dylan in America	0	1	10	4/4/2014	2010	1/12/2022	Biography	BPL	In
B	GAINSBORG, Serge	mi8fp	Gainsbourg	0	0	10	4/4/2014	2000	4/29/2018	Biography	BPL	In
B	GUNTHER, John Jr.	MJ1PU	Death be not proud : a memoir	0	0	10	6/17/2014	1998	6/7/2019	Biography	BPL	In
B	GUNTHER, John Jr.	MJ1PV	Death be not proud : a memoir	0	4	21	6/17/2014	1998	10/6/2022	Biography	BPL	In

High Circulation Report

- Adapted from CML report

Filter

- Branch(es)
- Item Circ Status (In, Out)
- Collection Code(s)
- Call Number range
- Lifetime circ count (range)

Output

- Items that need replaced or repaired
- Sometimes called “grubby” stock
- Lifetime circ limit is “suggested” check (60 circ for books)

Select Assigned Branch(es) to report on Select Collection(s) to report on

Select Item Status(es) to report on Enter the starting callnumber NULL

Select Lifetime Circ to report on Enter the ending callnumber NULL

View F

of 2 ?

 Find | Next

Items with High Circulation

Where Lifetime Circulation is at least 60

Item Call Number	Item Barcode	MARC Title	MARC Author	YTD Circ Count	Prev Yr Circ Cnt	Lifetime Circ Count	Item First Available Date	Publication Year	Last Checkout Date	Item Status	Assigned Collection
T FICTION ACEVEDO ELIZABETH	6004394208	The poet X	Acevedo, Elizabeth, author.	5	13	70	3/13/2018	2018	10/1/2023	In	Teen Fiction
T FICTION ADEYEMI TOMI	6004393051	Children of blood and bone	Adeyemi, Tomi, author.	7	12	67	3/1/2018	2018	9/5/2023	In	Teen Fiction
T FICTION ALBERTALLI BECKY	6003678494	The upside of unrequited	Albertalli, Becky.	5	4	65	4/25/2017	2017	5/5/2023	In	Teen Fiction
T FICTION ANSTEY CINDY	6002843586	Love, lies and spies	Anstey, Cindy, author.	10	12	64	4/27/2016	2016	10/4/2023	In	Teen Fiction
T FICTION ARMENTROUT JENNIFER	6007550111	The problem with forever	Armentrout, Jennifer L., author.	5	3	67	5/18/2016	2016	9/6/2023	In	Teen Fiction

Titles with Multiple Copies Grouped by Title

- CLC Custom Report

Filter

- Branch
- Item Circ Statuses (Lost, Missing)
- Minimum number of copies
- Collection Code(s)
- Item availability date (exclude new purchases)
- Last CKO date older than

Output

- Weeding once popular titles
- Determining the best cop(ies) to withdraw

branch	<input type="text" value="Delaware County District Library Main Branch"/>	Items Must be Available Before	<input type="text" value="1/1/2023"/>	
Minimum Item Count	<input type="text" value="3"/>	collections	<input type="text" value="Audio Book"/>	▼
excluded Statuses	<input type="text" value="Claim Never Had,Claim Returned,"/> ▼	Must Have an Item With a Last CKO Before	<input type="text"/>	<input checked="" type="checkbox"/> NULL

⏪ ⏩ 1 of 1 ▶ ↺ ↻ 100% ⏴ ⏵ 🖨 🔍 Find | Next

Bib ID	Title	Author	Bib Call No	Barcode	Item Call No	Volume	Status	Collection
3731580	WICKED DREAMS	JACKSON LISA AUTHOR	813/.54	32363011809898	CD JAC		In	Audio Book
				32363011724410	CD JAC		In	Audio Book
				32363011724428	CD JAC		In	Audio Book
Total	Total							

Missing Transferred Items

- CLC Custom Report

Filter

- Branch

Output

- Items sent to **fill a hold request**, but haven't made it to their destination
- Shows if there are other available copies that could fulfill the hold request
- Eventually items should be checked-in & made missing

Items sent 13 or more days ago. The ITEM OWNING library, represented with **bold** and underlined item barcodes, should check in item, deny filling the hold, and maintain the request position. The AC column shows if there are any additional copies (AC) that could fill this request.

Item Barcode	Collection	Call Number	Title	Author	Shelf Location	Patron Barcode	Patron Name	Item Status Date	A C
<u>MJYCR</u>	Children's Picture Book	JE MONSTERS TAYLOR	I want to be in a scary story	Taylor, Sean, 1965- author.				9/25/2023 4:29:35 PM	19
<u>mfsth</u>	DVD	Far and away	Far and away					9/1/2023 1:17:55 PM	5
<u>MLMEV</u>	Fiction	HUNTER, Denise	Wildflower Falls : a Riverbend romance	Hunter, Denise, 1968- author.	New Fiction			10/6/2023 1:21:43 PM	23
<u>ML2L8</u>	Teen Graphic Novel	ONE PIECE GRAPHIC NOVEL	One piece : Ace's story. Vol. 1, Formation of the Spade Pirates	Hinata, Sho, author.				10/10/2023 5:13:56 PM	1

Missing In-Transit

- CLC Custom Report

Filter

- Branch

Output

- Items being sent “**home**”, but haven’t made it to their destination
- Items show on both the sending & receiving library reports
- Eventually items should be checked-in & made missing

Items sent 70 or more days ago. These items should be made 'Missing'.

Items returning from InnReach requests have **bold** and underlined barcodes, libraries may wish to give these items additional shipping time.

Item Barcode	Collection	Call Number	Title	Author	Shelf Location	Item Status Date
1339789422	Children's Graphic Novel	J 741.5 B592 P378n	Big Nate. Nailed it!	Peirce, Lincoln, author, artist.	NEW BOOK AREA	4/6/2023 2:30:33 PM
1339177038	Children's Picture Book Colors	Picture Book Esperanza	Red, yellow, blue (and a dash of white, too!)	author, illustrator. Esperanza, C. G. (Charles George)		4/19/2023 3:12:29 PM
1338934902	Nonfiction	373.1264 G295 C713g	GED Test 2022/2023	Collins, Tim (Timothy G.), author.		5/5/2023 2:40:43 PM
1339233386	Science Fiction	Fiction Brown	Red rising	Brown, Pierce, 1988-		8/10/2023 10:17:19 AM

Uncataloged Titles with Holds with Branch Filter

- Adapted from Polaris Report (added branch filter)

Filter

- Branch
- Item Circ status (In-Processing/On-Order/Both)
- Requires use of Polaris Acquisitions

Output

- Items that should be cataloged “next”
- Hold requests made after the item was received
- Only shows titles which your branch owns

CML Dublin Branch

Uncataloged Titles with Holds with Branch Filter

Bib ID	Title	Author	Format	Rcpt. Date	Holds
3868105	Crosshairs	Patterson, James/ Born, James O.	Book	10/26/2023	2
3868109	Just for the Summer	Jimenez, Abby	Book	10/26/2023	1
3868115	Mind Games : A Novel	Roberts, Nora	Book	10/26/2023	4
3868117	Only If You're Lucky	Willingham, Stacy	Book	10/26/2023	1
3868118	Only the Brave	Steel, Danielle	Book	10/26/2023	4
3868119	Private : Missing Persons	Patterson, James/ Hamdy, Adam	Book	10/26/2023	2
3868101	The 24th Hour : The New Women's Murder Club Thriller	Patterson, James/ Paetro, Maxine	Book	10/26/2023	2
3868102	The Atlas Maneuver	Berry, Steve, 1955-author.	Book	10/26/2023	1

Titles by Collection and Genre

- CLC Custom

Filter

- Branch
- Item Material Type(s)
- Item Circ Status(es)
- Genre of linked Bib (655)

Output

- Items that need genre stickers updated

Branch MaterialType ItemStatus Genre

of 2 ? Find | Next

Titles by Collection & Genre

Collection	Browse Title	Call Number	Copy Number	Material Type	Barcode	Genre	ItemStatus
Fiction	1634 : the Baltic War	FLI	01	Book	31170003290834	Science fiction.	In
Fiction	1634 : the Ram rebellion	FLI	01	Book	31170003016254	Science fiction.	In
Fiction	3001 : the final odyssey	CLA	01	Book	31170000319024	Science fiction.	In
Fiction	48 hours	Forstchen	01	Book	31170004793844	Science fiction.	In
Fiction	A borrowed man	WOL	01	Book	31170004410688	Science fiction.	In
Fiction	A longer fall	Harris	01	Book	31170004900522	Science fiction.	In
Fiction	A mind for trade : a great new Solar Queen adventure	NOR	01	Book	31170000712053	Science fiction.	In
Fiction	A sound of thunder and other stories	BRA	01	Book	31170002883399	Science fiction.	In
Fiction	A very strange trip	HUB	01	Book	31170001153398	Science fiction.	In
Fiction	Admiral	DAN	01	Book	31170004475574	Science fiction.	In
Fiction	Afterland	Beukes		Book	31170004942771	Science fiction.	In
Fiction	Allies	GOL	01	Book	31170003849597	Science fiction.	In
Fiction	American empire : blood	Tur	01	Book	31170001770456	Science fiction.	In

Staff Planning

Reports that show
times with circulation
activity

First Time Checkouts by Day of Week by Hour

- CLC Custom
- Uses CLC Custom table

Filter

- Branch
- Date Range

Output

- Matrix that shows hourly first time CKOs (no renewals)

CML Driving Park Branch First Time Checkouts

9/1/2023 12:00:00 AM - 10/1/2023 12:00:00 AM

Hour	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total	Average
9AM-10AM	0	13	23	19	25	38	16	134	19
10AM-11AM	0	8	12	22	35	18	59	154	22
11AM-12PM	0	22	33	27	12	16	25	135	19
12PM-1PM	0	33	50	12	12	36	18	161	23
1PM-2PM	9	25	18	22	12	33	27	146	21
2PM-3PM	21	20	32	34	32	26	70	235	34
3PM-4PM	23	9	14	12	18	24	24	124	18
4PM-5PM	10	18	31	9	18	26	41	153	22
5PM-6PM	0	40	18	43	12	28	17	158	23
6PM-7PM	0	25	16	21	42	0	0	104	15
7PM-8PM	0	13	31	22	5	0	0	71	10
8PM-9PM	0	1	0	0	0	0	0	1	0
Total	63	227	278	243	223	245	297	1576	225
Average	16	19	25	22	20	27	33		

Circ Activity by Day of Week by Hour

- CLC Custom

Filter

- Branch
- Date Range

Output

- Matrix that shows hourly circulation transactions
- Includes CKI activity
- Does NOT include renewals

Circ activity at Alexandria Public Library by day of week by hour for September

Hour	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total	Average
5AM-6AM	0	4	1	0	0	0	0	5	1
6AM-7AM	3	4	6	6	3	1	4	27	4
7AM-8AM	1	1	3	0	0	0	3	8	1
8AM-9AM	0	2	37	4	28	0	14	85	12
9AM-10AM	1	115	47	12	127	2	43	347	50
10AM-11AM	0	24	50	38	229	5	138	484	69
11AM-12PM	1	48	41	99	135	1	196	521	74
12PM-1PM	0	46	74	115	42	1	65	343	49
1PM-2PM	0	20	115	31	32	3	106	307	44
2PM-3PM	0	102	45	46	46	2	48	289	41
3PM-4PM	0	27	113	62	29	1	106	338	48
4PM-5PM	0	43	101	7	56	0	3	210	30
5PM-6PM	0	89	176	0	47	0	1	313	45
6PM-7PM	0	32	33	0	20	0	0	85	12
7PM-8PM	0	16	14	0	19	0	0	49	7
8PM-9PM	0	1	1	0	0	0	0	2	0
9PM-10PM	0	0	0	0	0	1	0	1	0
Total	6	574	857	420	813	17	727	3414	488
Average	2	36	54	42	63	2	61		

Monthly Checkouts by Day of Week by Hour

- CLC Custom

Filter

- Branch
- Date Range

Output

- Matrix that shows hourly circulation transactions
- Includes renewal

SPL Grove City checkouts (includes renewal) by day of week by hour
 9/1/2023 12:00:00 AM - 10/1/2023 12:00:00 AM

Hour	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total	Average
12AM-1AM	3	0	4	0	1	27	0	35	5
1AM-2AM	0	0	2	2	0	6	0	10	1
2AM-3AM	0	1	0	0	1	0	0	2	0
4AM-5AM	2539	6409	4023	3573	3042	4473	58	24117	3445
5AM-6AM	51	216	40	22	797	35	1	1162	166
6AM-7AM	12	71	47	58	24	46	54	312	45
7AM-8AM	3	64	111	87	12	158	159	594	85
8AM-9AM	10	75	124	266	101	208	142	926	132
9AM-10AM	21	182	210	239	289	400	363	1704	243
10AM-11AM	62	292	387	328	289	345	525	2228	318
11AM-12PM	50	301	322	312	282	443	559	2269	324
12PM-1PM	52	322	450	440	343	460	535	2602	372
1PM-2PM	304	284	388	385	425	436	380	2602	372
2PM-3PM	228	188	390	338	275	493	399	2311	330
3PM-4PM	174	335	459	530	368	470	355	2691	384
4PM-5PM	225	342	292	286	311	416	318	2190	313
5PM-6PM	12	213	230	307	262	370	3	1397	200
6PM-7PM	11	159	325	256	284	8	11	1054	151
7PM-8PM	14	141	233	168	181	1	5	743	106



General Statistics

Percent Checked Out Location Heat Map

- Adapted from CML report

Filter

- Library

Output

- Real-time CKO/CKI data

Hot/Cold Key

White Hot = At or above 50% Out Goal

Red Hot = 45-49% Out

Orange = 40-44% Out

Yellow = 35-39% Out

Light Blue = 30-34% Out

Medium Blue = 25-29% Out

Gray Ash = At or below 24% Out

No Collection Data to Report

library Delaware County District Library

Navigation: |< < 3 of 4 ? > >| Refresh Back 100% Print Find | Next

First Page	Titles							
	Juvenile World Languages	1,274	89.78%	134	9.44%	11	0.78%	1,419
	L Harness Racing DEL	345	99.42%	1	0.29%	1	0.29%	347
	Large Print	13,819	83.37%	2,309	13.93%	447	2.70%	16,575
	Large Print Nonfiction	1,208	87.16%	155	11.18%	23	1.66%	1,386
	Launchpad	92	38.33%	147	61.25%	1	0.42%	240
	Local Author	11	73.33%	4	26.67%	0	0.00%	15
	Local History	5	100.00%	0	0.00%	0	0.00%	5
	Magazine	4,536	92.10%	373	7.57%	16	0.32%	4,925
	Magazine Holiday	2	100.00%	0	0.00%	0	0.00%	2
	Nonfiction	43,101	85.11%	6,766	13.36%	777	1.53%	50,644
	Ohio Authors	483	91.48%	43	8.14%	2	0.38%	528
	Oversize	1	50.00%	1	50.00%	0	0.00%	2
	Paperback	0	0.00%	0	0.00%	0	0.00%	0
	Picture Book Board Book	1,974	37.07%	3,272	61.45%	79	1.48%	5,325
	Picture Book Reader	6,716	54.91%	5,393	44.09%	122	1.00%	12,231
	Playaway	1,286	83.94%	196	12.79%	50	3.26%	1,532
	Special Collections	1,220	69.59%	532	30.35%	1	0.06%	1,753
	Tabletop Game	246	49.50%	235	47.28%	16	3.22%	497

Browse vs Holds Circulation


- CLC Custom


Filter

- Library
- Date Range
- Group By


Output

- Count of first time CKO via Hold Pickup
- Count of first time CKO via browsing (no hold on title)


Enter Start Date 


Enter End Date 

libraryid 

Group By 



 of 1
 


 Find | Next

Branch	Material Type	Browse CKOs	Hold CKOs	Total First Time CKO
Alexandria Public Library	Audio Book	10	7	17
	New Book	0	2	2
	Paperback	7	11	18
	Juvenile Audio Book	12	0	12
	Juvenile Book	666	215	881
	Juvenile Video Non-Fiction	1	1	2
	Video Non-Fiction	28	5	33
	Juvenile Video Un-Rated	0	1	1
	Video G / TV-G / TV-Y / TV-Y7 / TV-Y7 FV	2	2	4
	Video PG	22	6	28
	Juvenile Kit	4	0	4
	Music CD/Cassette	18	3	21
	Juvenile Music CD/Cassette	1	0	1
	Book	297	167	464
	Inn-Reach Books and Audio	0	2	2
	Periodical	30	5	35
	Video R / TV-MA	29	9	38
	Videogame E	0	1	1
	Video Un-Rated	7	1	8
	Video PG-13 / TV-14	35	10	45
Total		1169	448	1617
Total		1169	448	1617

Local vs System Circulation

- CLC Custom
- Limited to item history cutoff date

Filter


- Branch
- Date Range

Output

- Count of CKOs excluding renewals
- Broken down by collection code
- Shows if items are popular at this branch or elsewhere in the system

branches ▾

Begin Date 

End Date 

◀ ◁ of 2 ? ▷ ▶   ▾  ▾ 

Collection	Local CKOs	System CKOs	Total CKOs
Audio Book	353	238	591
BluRay	442	543	985
BluRay International	29	43	72
BluRay Nonfiction	26	39	65
BluRay Television	32	89	121
DVD	1453	987	2440
DVD Anime	48	40	88
DVD International	194	278	472
DVD Nonfiction	363	404	767
DVD Television	545	518	1063
Equipment	26	0	26
ESOL	6	0	6
Fiction	3603	1715	5318
Fiction World Languages	6	4	10
Graphic Novel	42	74	116

Pickup Locker Stats



- CLC Custom


Filter







- Branch – Can work for any branch, not just lockers
- Date Range





Output

- Number of unique patrons
- Number of titles held
- Number of title picked-up
- Number of titles unclaimed

start Date  end Date 

branch 





 of 1
 
















Pickup Locker Stats





Patrons Holds Placed	Titles Holds Placed	Patrons Picked Up	Items Picked Up	Patrons Unclaimed	Items Unclaimed
68	338	84	499	25	39

10/26/2023 11:17:24 PM

start Date  end Date 

branch 



 of 1
 




Pickup Locker Stats

Patrons Holds Placed	Titles Holds Placed	Patrons Picked Up	Items Picked Up	Patrons Unclaimed	Items Unclaimed
1117	5214	2921	22010	314	655

10/26/2023 11:18:48 PM

Turnover Rate by Dewey Class

- CLC Custom
- Only reports on items records still in the system
- Other versions available

Filter

- Branch

Output

- Non-fiction items broken down by Dewey classification
- Turnover = # items / # circs
- Shows “popularity” of certain Dewey classifications



branches CML Whetstone Branch

1 of 1 100% Find | Next

Turnover Rate by Dewey Class

branch	Dewey Class	Items	YTD Circ Count	YTD Turnover	Previous YTD Circ Count	Previous YTD Turnover	Lifetime Circ Count	Lifetime Turnover
CML Whetstone Branch	000	1614	7203	4.46	7515	4.66	39211	24.29
	100	3915	17695	4.52	18424	4.71	86468	22.09
	200	3142	11961	3.81	13395	4.26	71948	22.90
	300	9547	32907	3.45	36393	3.81	190855	19.99
	400	999	3510	3.51	3736	3.74	23758	23.78
	500	7516	28318	3.77	32597	4.34	159560	21.23
	600	18282	83788	4.58	91827	5.02	506055	27.68
	700	15109	72567	4.80	81033	5.36	392930	26.01
	800	1083	3808	3.52	4236	3.91	25350	23.41
	900	6264	23263	3.71	23488	3.75	133686	21.34
	B100	1	3	3.00	0	0.00	3	3.00
	B600	3	11	3.67	0	0.00	15	5.00
	C400	1	6	6.00	0	0.00	6	6.00

Showing that 600s are more popular than the 300s

Other popular reports



Other reports

[Library Calendar Information](#)

[Auto-Login Disabled Workstations](#)

[Self-Registered Patrons without Self-Registered Barcodes](#)

[INN-Reach Lending In-Transit Too Long](#)

[INN-Reach Borrowing Returned Too Long](#)

[INN-Reach Borrowing Requested Too Long](#)

[Item Circulation Statistics](#)

[Statistical Summary](#)



Requesting new reports

The best way to get what you want

Requesting a new report

01

See if an existing report comes close

02

Give the purpose of the report

03

Be clear about what records you do and don't want to see

branches ▾

⏪ < 1 of 1 > ⏩ ↺ ↻ 100% ▾ 📄 ▾ 🖨️ Find | Next

Turnover Rate by Dewey Class

branch	Dewey Class	Items	YTD Circ Count	YTD Turnover	Previous YTD Circ Count	Previous YTD Turnover	Lifetime Circ Count	Lifetime Turnover
☑ CML Whetstone Branch	000	1614	7203	4.46	7515	4.66	39211	24.29
	100	3915	17695	4.52	18424	4.71	86468	22.09
	200	3142	11961	3.81	13395	4.26	71948	22.90
	300	9547	32907	3.45	36393	3.81	190855	19.99
	400	999	3510	3.51	3736	3.74	23758	23.78
	500	7516	28318	3.77	32597	4.34	159560	21.23
	600	18282	83788	4.58	91827	5.02	506055	27.68
	700	15109	72567	4.80	81033	5.36	392930	26.01
	800	1083	3808	3.52	4236	3.91	25350	23.41
	900	6264	23263	3.71	23488	3.75	133686	21.34
	B100	1	3	3.00	0	0.00	3	3.00
	B600	3	11	3.67	0	0.00	15	5.00
	C400	1	6	6.00	0	0.00	6	6.00

What do most reports look like?

If you can provide a spreadsheet mock-up, you'll be a hero!

	A	B	C
1	Item Title	Item Call Number	Item YTD Circ
2			
3			
4			

Thanks!

