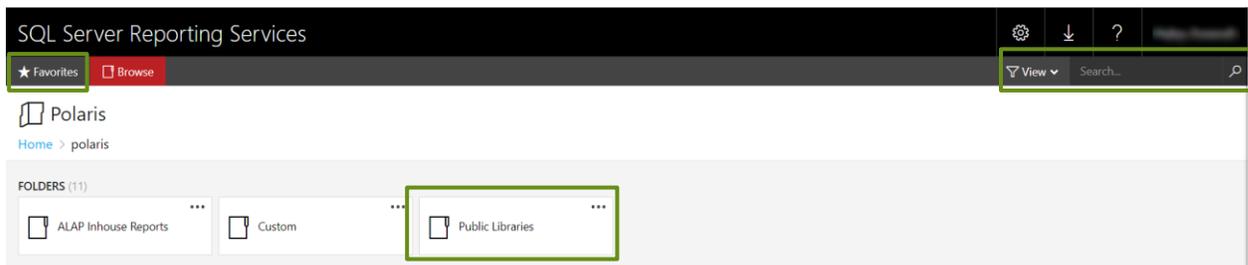


To access **reports**, select reports from the **utilities** drop-down menu.

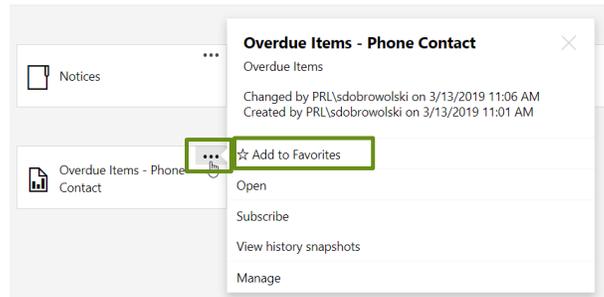
1. This will open in a second web browser tab, you may be prompted to sign in with your LEAP username and password.



The reports web page will open and you will be immediately brought to the Polaris file. All data in these reports is pulled from Polaris.



2. Select the **Public Libraries** folder. Once here you can navigate the folders and browse for reports or use the search bar to locate reports using **keywords**.
3. When you find a report you like, you can save it as your favorite and make it easily accessible.



- a. Click the **three dots** in the right corner of the report and select **add to favorite**. You will then be able to locate your most commonly used reports in **favorites**, at the top of the webpage

## Helpful Reports

### Notices

**Phone Notification Holds includes ILL** – This creates a list of all the available holds, within the date parameters, for patrons that require a phone call to notify them of their held items.

**Overdue Items - Phone Contact** – This creates a list of all your patrons that require a phone notification because their checkout items are overdue.



## Helpful Reports

### Collection

**Dusty Books Report** – This creates a list of items based on the age of the item and when the item last circulated. This is helpful for weeding older items that have not been circulating. **Tip: the default settings generates a list of 5 years old items that have not circulated in 3 years.**

**Collection Age Details – Interactive** – This displays the age of a library's collection in time intervals based on the date the item was added to the system. It will also provide a list of all items in each age category. This can be used to determine how current or outdated each collection is. **Tip: click the + in the grey box to open a full list of records.**

**Funds and Order Info** – This breaks down library collection spending based on bill direct and allotment funds. You can also view all 'On -Order' items.

### Circulation

**Item Circulation by Collection** – This creates a list of items circulated based on their collection code. This is helpful for collection development in that you can determine which collections are most popular and where you may need to improve to increase circulation.

**Item Circulation Statistics** – This creates a list of items circulated based on material type and a selected date parameter. This is helpful for determining productivity and where collection development should focus.

**Lost and Missing Items** – This creates a list of all items lost and missing. Lost items are items that have not be returned by patrons, which you can remind patrons to return. Missing items are items that can not be located in the library, which you can look for or withdraw.

### Patron

**Patron Register**- This creates a count of registered patrons (including active and inactive patrons) and sorts them by patron code. This can be used to determine how many patrons were registered within a time frame. **Tip: for a full count use a wide time range.**

**Expired Patrons** – This creates a list of patrons whose library memberships have expired before a selected date. This is great for cleaning up old records or contacting old patrons and reminding them to renew their library card.

**Inactive Patrons** – This creates a list of patrons who have not been active since a selected date. This is great for cleaning up old records or contacting old patrons and reminding them to renew their library card. **Tip: for a list of all patrons, set the "start date" back to 1989 and the "end date" to today.**

**Fines and Fees Summary** – This creates a summary total of all financial transactions and breaks them up by Charges, Credits, Waived, and Payments. This is helpful to see how fees are handled at your library.