**Circulation Reports**

Circulation reports help you track circulation, overdue items, overdue patrons, and delinquent patrons. To access these reports, select **Utilities > Reports and Notices** from the Polaris shortcut bar, and select **Circulation** in the Polaris Reports window.

* Circulation by Collection Material Type Analysis - This report shows a count of circulations by material type within each system-defined collection for a time period you designate. It gathers statistics from the transaction file and will include circulated items that have since been deleted. The report counts checkouts and renewals as separate transactions; if an item is checked out multiple times, each checkout is counted. The report also displays the percentage of total items that each collection/material type combination represents. You can filter the report by one or more branches. The branches included are the circulated items’ assigned branches.

**Note:**The Cataloging Item report Collection Material Type Analysis provides the collection/material type information without circulation statistics.  
  
The Cataloging Item report Collection Disposition by Material Type shows the number and percentage of items currently on the shelf (or otherwise considered available), items out (unavailable but accounted for), or not accounted for (lost, missing).  
  
For more information about these and other Cataloging reports, see [Cataloging Reports](https://documentation.iii.com/polaris/7.7/PolarisStaffHelp/Polaris_Basics/PIreports/Cat_Reports.htm#Catalogi).

* Circulation by Item’s Assigned Branch - For a specified date range, reports the number of items from the reporting (item) branch that have been checked out and renewed at other branches, as well as the reporting branch. You can see how many items have been shipped from the reporting branch to each loaning branch, and the total circulation for the reporting branch’s items. The report is sorted by organization, loaning branch, and item material type. You can filter this report by organization (item’s assigned branch).
* Circulation by Item’s Loaning Branch - For a specified date range, reports the number of items from all the branches that have been checked out and renewed at the reporting (loaning) branch. The report also includes total items and total transactions. The report is sorted by organization, item’s assigned branch, and item material type. You can filter this report by organization (loaning branch).
* Circulation by Postal Code - For a specified date range and organization, reports checkout transactions by postal code. The results are grouped by branch then country type (USA, Canada, Non-USA/Non-Canada, and No Postal Code). Details include the Postal Code, City, State, Number of Checkouts, Unique Patrons, and Unique Items followed by Totals and Grand Totals.
* Circulation by Workstation - For a specified date range, reports the number of items that have been checked out and renewed at specified workstations. The report is sorted by organization, workstation, and item statistical class (item stat code), and includes totals by item stat code, totals for each workstation, and totals for each organization. You can filter this report by organization (workstation’s parent branch). The branch responsible for the checkout is the branch associated with a renewal. The report separates renewals done from PAC and lists them under System.

**Note:**The report is based on workstation ID, so if a workstation is reassigned to a new organization the report will include transactions for both the old and new locations. This may also happen if a “floating” staff member at the workstation logs on to one branch, does transactions, then logs on to a different branch from the same workstation.

* Delinquent Patrons - Identifies patrons (name, phone, barcode) who have system blocks, free-text blocks, or library-defined blocks on their records. You can filter this report by organization (patron’s registered branch).
* Expired Reserve Items - Identifies items with a status of On Reserve, but for which the reserve period has expired. You may find this report especially useful at the end of an academic term. After you run the report, you can take the reported items off reserve, pull them from the shelves, and return them to the regular collection or otherwise dispose of them. You can filter this report by organization, and sort it by call number, title, and course name.
* Fiscal Year Turnover Rate - This report offers similar information to the Turnover Rate report, but you can specify a fiscal year and that year’s starting month. The report then compares that year’s turnover rate information with the current year’s statistics.

**Important:**Because this report gathers up to two years of data, it may take several minutes to complete.

* Floating Items by Home Branch -  A statistical report that counts how many items from the home branch have floated to other branches. You can select one or more home branches and set a date range. The report includes the following information:
  + **Home branch**
  + **Date range**
  + Collection - Listed if an item from that collection has floated; includes the total number of items from that collection that have floated.
  + Material type - Listed if an item of that material type has floated; includes the number of items of that material type that have floated.
  + Float to branches - Lists each branch that items have floated to and the number of unique items that have floated to that branch. (The same item may float to a branch more than one time; the report counts an item only once.) If the same item floats to more than one branch, it is counted once for each branch.
  + Total number of items that have floated - Unique items only. The same item may float to different branches or float and return. It is counted only once.
* Floating Items Setup - A summary report for the home branch showing the branch’s floating settings. You can select one or more branches. If a branch has not enabled floating collections but has defined values, the report prints the values. If a branch has not enabled floating collections and has not defined any values (collections, material types and so forth) the report is blank. This report includes the following information for each selected home branch:
* All collections selected for floating
* All material types selected for floating
* All branches selected for receiving
* On-shelf item limit for receiving branches
* Total item limit for receiving branches
* No matching collection allowed (yes/no)
* Blank collection allowed (yes/no)
* Floating enabled (yes/no)
* Floating Items by Assigned Branch - A statistical report that counts how many items from other branches have been checked into the receiving branch. You can select one or more receiving branches and set a date range. The printed report includes the following information for each receiving branch selected for the specified time period:
  + **Date range**
  + **Receiving branch name**
  + Received items by collection - Lists the collections into which floating items were received and the total number of items received into each collection.
  + Received items by material - Lists the material types of floating items that were received and the total count for each material type.
  + Previous branch (the last assigned branch of an item) - Lists each branch and the number of items received from that branch.
  + Home branch - Lists each home branch and the number of items received from that branch.
  + Total number of (unique) items received - The number of unique items. If a particular item floated out to another branch and then floated back at a later time, the item is counted only once.
* Hourly Circulation Report - Counts in-library check-out and renewal transactions for a selected date range by day of the week and by hour. (Renewals from Polaris PowerPAC and Mobile PAC are not included.) You select one, several, or all branches in the system and specify a date range. The report will include transactions from the beginning of the first day through and including the end of the final day. The report is divided into sections by selected branch, and sorted within each branch section by day, then by hour; a grand total for all selected branches is included. Report output columns include:
* Day of week and hour of day - The report breaks out each hour of the day in which transactions occurred starting from 12:00 a.m. It repeats each day with an hourly unit during which transactions occurred. The report lists only the hours with transactions. If no circulation transactions occurred for an hourly period, that period does not appear in the report; if no circulation transactions occurred for an entire day, that day is listed in a single line with 0  total check-outs.
* Total circulation - Total transactions for each branch.
* In-House Use - Reports the number of items used in a specified organization, sorted by material type. These counts are taken from the Year-to-date in-house usage counter and Lifetime in-house usage counter in the item records. The Year-to-date counter is a count of everything checked in, through InHouse mode, since the last time the site did an item record fiscal year-end rollover. The Lifetime counter is a continuous counter. Both counters follow the site’s year-end rollover schedule.
* Item Circulation by Collection - For the specified date range and the selected circulating organization(s), reports the number of items by collection that have been circulated, the number of check-out transactions, and the number of renewal transactions. The report is sorted by the circulating (transacting) branch and collection. You can filter this report by organization.

**Note:**This report includes on-the-fly and QuickCirc items. A similar report, constructed in Polaris SimplyReports, also includes these ephemeral items in the count but does not assign them a collection code.

* Item Circulation by Item Statistical Code - For a specified date range, reports the number of items by statistical code that have been circulated, the number of check-out transactions, and the number of renewal transactions. Check-out transactions include those made in the staff client, offline/bookmobile, Polaris ExpressCheck, and SIP self-check. Renewals include these sources as well as renewals from PAC. The report is sorted by organization and statistical code. You can filter this report by organization.
* Item Circulation Statistics - 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 organization and material type. You can filter this report by organization.
* Long Overdue Items - Lists items that are currently long overdue; includes assigned branch, call number, title, item barcode, check-out date, due date, date of last notice, patron, and patron barcode for each item. The report is sorted by organization and call number. You can filter this report by organization.
* Overdue Items - Lists items that are currently overdue and long overdue; includes assigned branch, call number, title (with issue designation for serials), item barcode, due date, patron and patron’s branch, and patron’s telephone number for each item. This report helps you confirm that the reported items are not on the shelf before sending overdue notices. The report is sorted by organization and call number. You can filter this report by organization.
* Overdue Patrons - Identifies patrons from the reporting library who currently have overdue or long overdue items, including detailed information about the patron and the items. The report is sorted by organization and patron name. You can filter this report by organization.

**Note:**The Overdue Items report identifies patrons from other libraries who have overdue items.

* Overdue Reserve Items - Lists reserve items with a status of On Reserve or Permanent Reserve that are checked out and overdue. You can use this report to contact patrons with overdue reserve items. It includes the title, material type and barcode, due date, course, and the borrowing patron’s telephone number and registered branch. You can filter the report by reserve item branch, and sort it by branch, call number, course name, due date, or title.
* **Patron Circulation by Statistical Class** - This report shows the number of circulation transactions by patron statistical class that occurred during a specified date range for a selected branch or branches. The report is grouped by branch and then by patron statistical class. Under each branch heading, the following columns appear:
  + **Patrons** - The total number of patrons in the statistical class.
  + **Check-outs** - The number of checkout transactions associated with the patrons in this statistical class for the specified time period.
  + **Renewals** - The number of renewal transactions associated with the patrons in this statistical class for the specified time period.
  + **Total check-outs + renewals** - The total number of checkout and renewal transactions associated with the patrons in this statistical class for the specified time period.
* Patron Circulation Statistics - For a specified date range, reports the number of circulation transactions (check-outs and renewals), according to patron code. This report measures circulation activity, not the number of items circulated. The report is sorted by branch name, in alphabetical order. You can filter this report by organization.
* Patron Code Statistics - For a specified date range, reports the number of patrons that have done check-outs and renewals, according to patron code and statistical class code. The report is sorted by organization, patron code, and statistical class. You can filter this report by organization.
* Patron Cross Borrowing - For a specified date range, reports the number of borrowers by patron code who were registered at a library other than the transacting library; includes the number of circulation transactions (check-outs and renewals) done by each patron. The report is sorted by organization (transacting library), patron library, and the number of circulation transactions (highest to lowest). You can filter the report by organization (transacting library).
* Patron Lost Items by Owning Branch - Lists lost items assigned to a specific branch, broken down by the registered branches of the patrons who lost the items. You can set a date range and filter the report by organization. To access this report, select **Utilities, Reports and Notices** from the Polaris shortcut bar, and select **Circulation** in the Polaris Reports dialog box.
* Payment Distribution Report - For a specified date range, for all or select branches, reports the money that was taken in at a branch for items belonging to other branches. Payments consists of all overdue, replacement, and processing fees.
* Receipt Delivery Failure - Lists the patron barcode, patron name, carrier name, delivery address, subject, and failure date for receipts that failed to be delivered to patrons.
* Remove Patron ID Report - When you enable patron ID purging, you can run a report to track the number of patron IDs purged during a time period you specify. Select **Utilities, Reports and Notices** from the Polaris shortcut bar, select **Circulation** in the Polaris Reports dialog, and double-click **Remove Patron ID from circ transactions process log**. You set transaction start and end date parameters for this report. The report includes Organization (transacting organization), Transaction Start Date (starting date of the purged transactions), Transaction End Date (ending date of the purged transactions), a count of the patron IDs removed from transactions for the specified period, a count of the patron IDs removed from item record histories for the specified period, and total IDs removed. (If the same patron ID occurs more than once in an item record history, each occurrence is counted.)
* Reserve Item Records - Lists all reserve item records by assigned branch, regardless of the reserve status; includes call number, barcode, title, material type, course information, reserve start/end date, and reserve status. You can filter this report by organization, and sort it by reserve status, title, call number, and course name.
* Reserve Shelf List - Lists reserve items currently on reserve (status of On Reserve or Permanent Reserve). You can use this report as a shelf list to check all items that should be currently reserved at the library. The report includes the circulation status of each item, as well as other item and course information. You can filter this report by organization, and sort it by call number, title, and course name. If an item is on reserve for more than one course, the report lists the item more than once.

**Tip:**You can send the Reserve Statistics by Course report as a notice to the primary and alternate instructors linked to the active courses.

* Reserve Statistics by Course - Lists reserve items currently on reserve (status of On Reserve or Permanent Reserve) for a course with a status of Active, and the number of times each item has been checked out. For example, this report is useful if an instructor asks whether items on reserve for a particular course are circulating. You run the report for a selected course/section number or multiple course/section numbers at a particular branch. Items that circulate while on reserve also increment the year-to-date circulation counter in the primary item record. Reserve circulations are included in the standard circulation statistical reports.

**Note:**The turnover rate is the number of items circulated divided by the total number of items owned. Two reports calculate turnover rate by collection or item statistical code, for a selected branch or multiple branches. These reports can help you determine, for example, how heavily a collection is used in relation to the size of the collection:

* Top Circulating Titles by Collection - Lists the top circulated titles, organized by selected branch and collection, for a specified date range. You select one, several, or all branches in the system and specify a date range, collection, and number of titles to show. The branches are items’ assigned branches. The report will count check-out and renewal transactions for the date range from the beginning of the first day through and including the end of the final day. The report is divided in to sections by items’ assigned branch, and sorted within each branch section by collection name and then by titles according to circulation count (high to low). The columns include the following information:
  + **Collection**
  + **Titles within collection**
  + Count of circulations for each title - Each checkout and each renewal is counted for each title regardless of check-out branch or patron’s branch. The titles with the highest circulation numbers appear in the report. If there are fewer than the specified number of circulated titles in a collection, the reports lists all the titles that have circulation counts. If some titles have the same count, the report lists each, up to the specified number of titles.  If a collection has no circulating titles, it is not listed in the report.
* Turnover Rate - This report counts all item check-out and renewals where the item’s assigned branch matches a selected branch or branches and the transaction date is within the selected date range. You specify whether to report by collection (the default) or by item statistical code. For each selected branch, the report lists each collection or item statistical code that has had circulation, the total items in the collection or statistical code, the number of circulations for each collection or statistical code, and the corresponding turnover rate (circulated items/total items) expressed as a decimal figure, and the totals of these figures for each branch. If the report includes more than one branch, combined totals for the selected branches are also included.

**Notes:**The item count is based on the number of items in the assigned branch’s holdings on the date the report is run.  
  
Check-out and renewal transactions are counted without regard to the transacting patron. That is, if the same patron checks out the same item 12 times, 12 transactions are counted.  
  
The patron’s registered branch is not considered in any way.  
  
If an item is put in transit to fill a hold at another branch and is checked out from that branch, the transaction is counted.

* Uncirculated Items - Identifies items with little or no circulation since their creation date, to help you remove them from the collection. You specify the item record creation date and circulation thresholds. The report lists all items created before the specified date with a record status of Final that have the specified number or fewer circulations. The default number is 0; that is, no circulations. The report includes the total number of circulations and the last circulation date for reference, and is sorted by organization and call number. You can filter this report by organization.
* Statistical Summary - To access this report, select **Utilities, Reports and Notices** from the Polaris shortcut bar, and select **System** in the Polaris Reports dialog box. See [System Reports](https://documentation.iii.com/polaris/7.7/PolarisStaffHelp/Polaris_Basics/PIreports/System_Reports.htm#System).

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