Training

POLARIS REPORTS

Introduction to SimplyReports

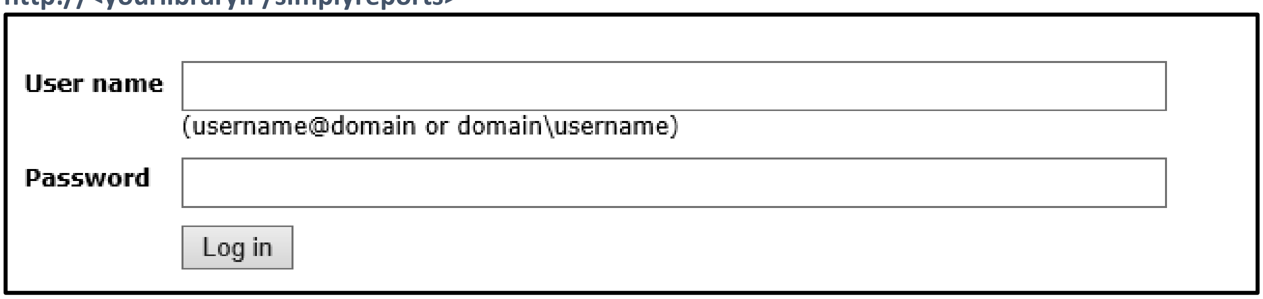
What is SimplyReports

- SimplyReports offers ability to create thousands of reports using a simple Web-based interface.
- Easy to select criteria (parameters) using multiple filters
- No need for in-depth knowledge of the Polaris database or expertise in Structured Query Language (SQL).
- Select specific data to output

How to Login

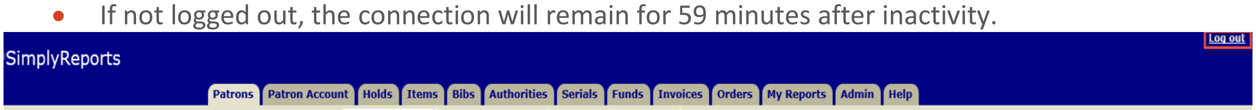
- Administrator assigns the permission for all or selected records.
- Using any browser, go to:

http://<yourlibraryIP/simplyreports>



How to Logout

- Make sure to logout.
- If not logged out, the connection will remain for 59 minutes after inactivity.



Data Source for Reports

- **Patron** —Data from patron registration records and patron account (status) records
- **Patron account** —Data from patron account (status) and their linked patron registration records, item and bib records

- **Holds** —Data from hold request records and their linked bib, item, patron account and patron registration records
- **Items** --Data from item records and their linked patron accounts, patron registration and bib records
- **Bibs** --Data from bib records and their linked items
- **Authorities** --data from authority record, their linked bib and item records
- **Serial** --Data from Serial Holdings records (including data from publication patterns and compressed holding statements) serial issues/part records and subscription records, linked suppliers and item records
- **Funds** --Data from fund records, fiscal year records, their linked bib and item records
- **Invoices** --Data from invoice records, their linked fiscal year, fund, item, bib and supplier records
- **Orders** --Data from PO (including POLI and segment data), their linked fiscal year, fund, item, bib and supplier records

Types of Reports Available

List– As the name of the report indicates, you can create a list of records containing a set of information. List reports subtab is available for all records.

Count – If you are interested to know how many records contain a set of conditions, use Count reports. So, count reports give the number of records where list gives you the actual records containing the similar information.

Statistical reports show number of transactions, stats on records created or deleted – it looks different from the other reports. This will produce # of transactions for the type of record we've selected.

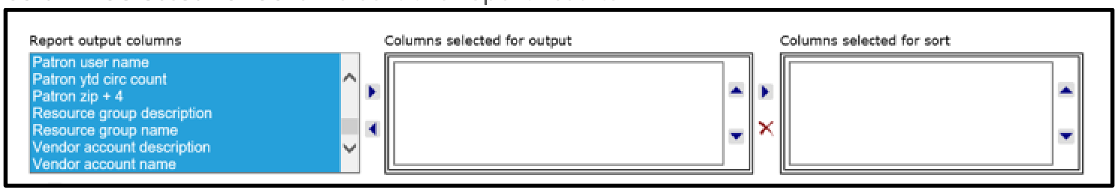
Counts and statistics are available for all records except order, fund and invoice records. The order, fund and invoice records have the summary reports instead.

- **List** : All records
- **Counts**: Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials
- **Statistics**: Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials
- **History**: Items, Patrons
- **Export files**: Bibs
- **Summary**: Funds, Invoices, Orders

List or Count Report Workform

Maximum Rows to Retain: The default number can be changed.

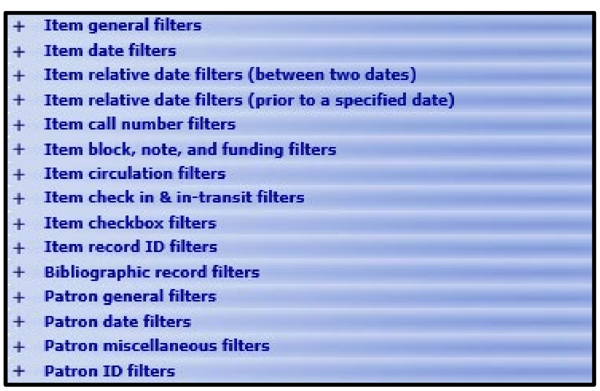
Report Output Column: List of available fields for the selected report
Columns Selected for Output: Select the fields from the **Report Output Column** to be included in the report. To reorder the columns from left to right on the report, use the up or down arrows.
Column Selected for Sort: To sort the report results



Include header rows: To include a header row
Select the file type for the report:

- Text file - If you select this file format, select an entry in the Delimiter type box.
- Excel - This is the default file type. When you save the report output in this file type, the file is saved in Microsoft Excel format.

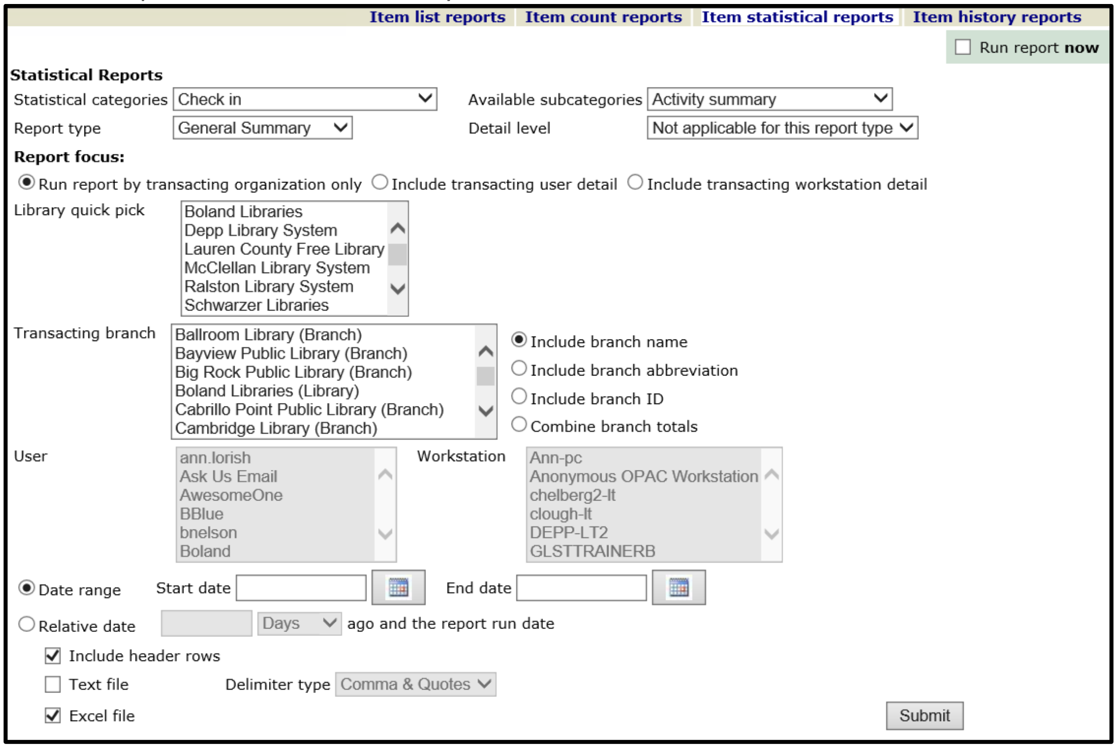
Filters: Report filters limit the report output by characteristics of the records for which you are creating the report, or by characteristics of linked records.



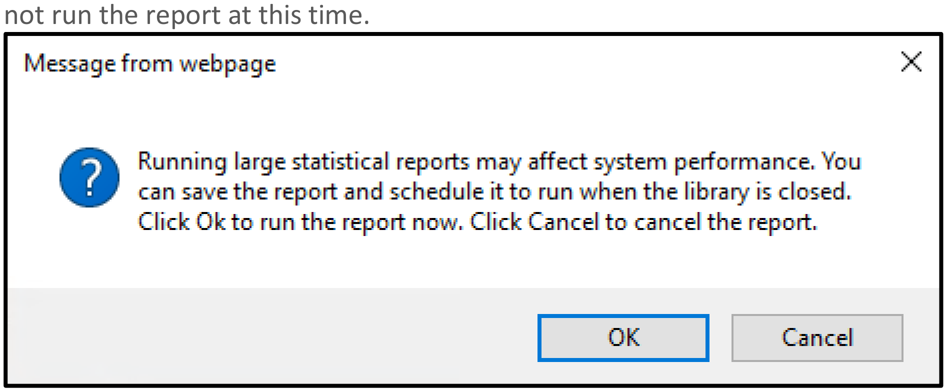
Statistical Report Workform

The statistical report uses the transactional data from the appropriate record.

The statistical reports use the database server and will place a great deal of demand on it. It will slow down Polaris performance. It should be scheduled for a time outside the normal library hours. The “run report now” is unchecked by default.



Click “run the report now”, if you like to run the report now. You will get a warning that you should not run the report at this time.

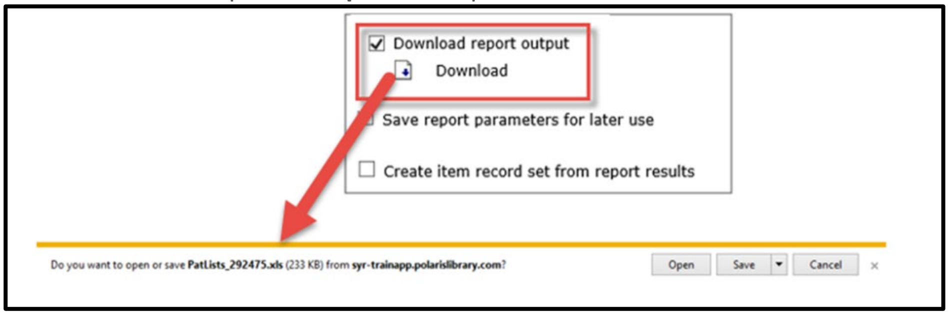


To download reports

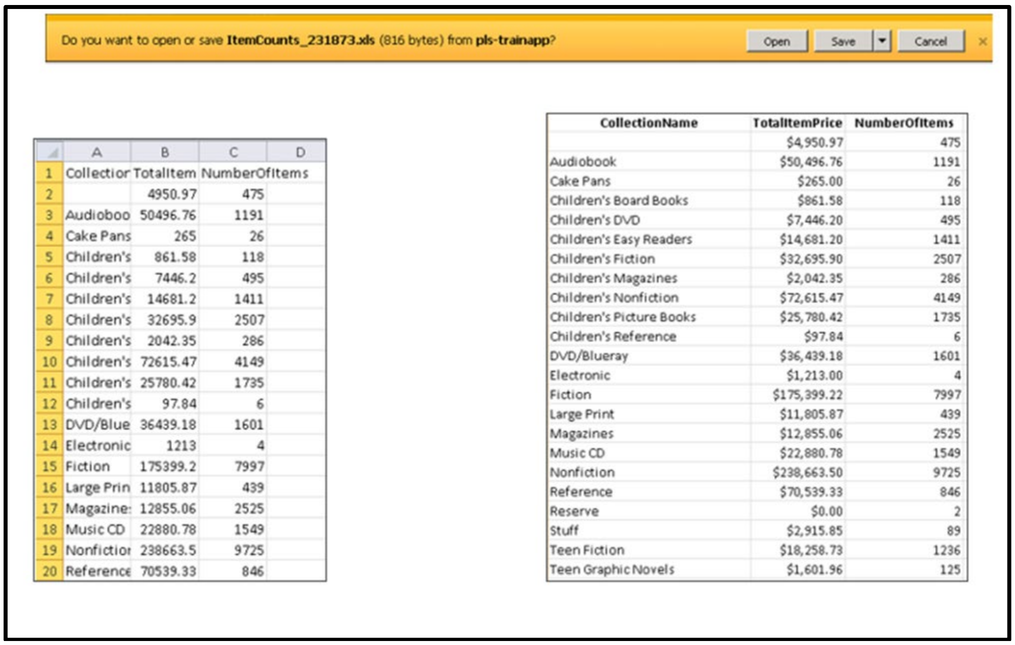
The format of the report has already been selected

- Click Download report Output

- Have the option to **open** the report



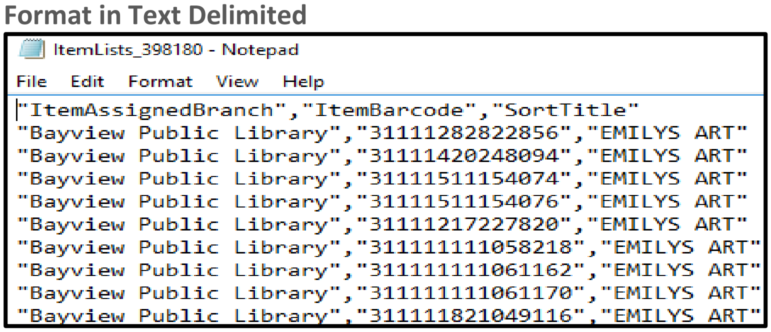
Format in Excel



	A	B	C	D
1	Collection	TotalItem	NumberOfItems	
2		4950.97	475	
3	Audioboo	50496.76	1191	
4	Cake Pans	265	26	
5	Children's	861.58	118	
6	Children's	7446.2	495	
7	Children's	14681.2	1411	
8	Children's	32695.9	2507	
9	Children's	2042.35	286	
10	Children's	72615.47	4149	
11	Children's	25780.42	1735	
12	Children's	97.84	6	
13	DVD/Blue	36439.18	1601	
14	Electronic	1213	4	
15	Fiction	175399.2	7997	
16	Large Prin	11805.87	439	
17	Magazine	12855.06	2525	
18	Music CD	22880.78	1549	
19	Nonfictio	238663.5	9725	
20	Reference	70539.33	846	

CollectionName	TotalItemPrice	NumberOfItems
	$4,950.97	475
Audiobook	$50,496.76	1191
Cake Pans	$265.00	26
Children's Board Books	$861.58	118
Children's DVD	$7,446.20	495
Children's Easy Readers	$14,681.20	1411
Children's Fiction	$32,695.90	2507
Children's Magazines	$2,042.35	286
Children's Nonfiction	$72,615.47	4149
Children's Picture Books	$25,780.42	1735
Children's Reference	$97.84	6
DVD/Blueray	$36,439.18	1601
Electronic	$1,213.00	4
Fiction	$175,399.22	7997
Large Print	$11,805.87	439
Magazines	$12,855.06	2525
Music CD	$22,880.78	1549
Nonfiction	$238,663.50	9725
Reference	$70,539.33	846
Reserve	$0.00	2
Stuff	$2,915.85	89
Teen Fiction	$18,258.73	1236
Teen Graphic Novels	$1,601.96	125

Format in Text Delimited

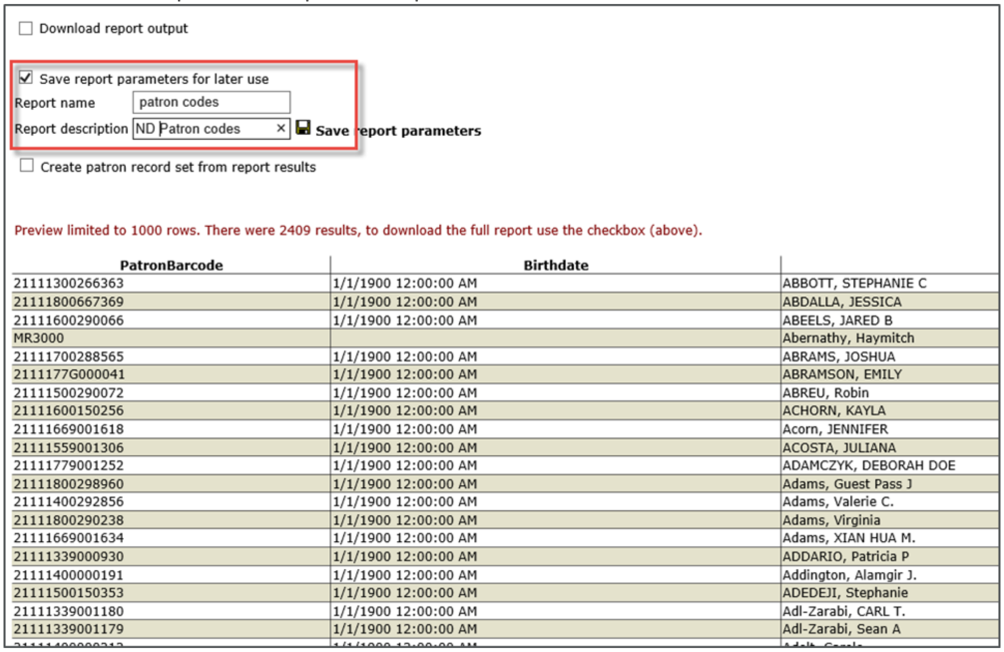



```
"ItemAssignedBranch","ItemBarcode","SortTitle"
"Bayview Public Library","31111282822856","EMILYS ART"
"Bayview Public Library","31111420248094","EMILYS ART"
"Bayview Public Library","31111511154074","EMILYS ART"
"Bayview Public Library","31111511154076","EMILYS ART"
"Bayview Public Library","31111217227820","EMILYS ART"
"Bayview Public Library","311111111058218","EMILYS ART"
"Bayview Public Library","311111111061162","EMILYS ART"
"Bayview Public Library","311111111061170","EMILYS ART"
"Bayview Public Library","311111821049116","EMILYS ART"
```

Save the Report Parameters

- Click "save report parameters for later use"
- Enter a report name, click "save"

- The report description is optional



Download report output

Save report parameters for later use

Report name patron codes

Report description ND Patron codes Save report parameters

Create patron record set from report results

Preview limited to 1000 rows. There were 2409 results, to download the full report use the checkbox (above).

PatronBarcode	Birthdate	
21111300266363	1/1/1900 12:00:00 AM	ABBOTT, STEPHANIE C
21111800667369	1/1/1900 12:00:00 AM	ABDALLA, JESSICA
21111600290066	1/1/1900 12:00:00 AM	ABEELS, JARED B
MR3000		Abernathy, Haymitch
21111700288565	1/1/1900 12:00:00 AM	ABRAMS, JOSHUA
2111177G000041	1/1/1900 12:00:00 AM	ABRAMSON, EMILY
21111500290072	1/1/1900 12:00:00 AM	ABREU, Robin
21111600150256	1/1/1900 12:00:00 AM	ACHORN, KAYLA
21111669001618	1/1/1900 12:00:00 AM	Acorn, JENNIFER
21111559001306	1/1/1900 12:00:00 AM	ACOSTA, JULIANA
21111779001252	1/1/1900 12:00:00 AM	ADAMCZYK, DEBORAH DOE
21111800298960	1/1/1900 12:00:00 AM	Adams, Guest Pass J
21111400292856	1/1/1900 12:00:00 AM	Adams, Valerie C.
21111800290238	1/1/1900 12:00:00 AM	Adams, Virginia
21111669001634	1/1/1900 12:00:00 AM	Adams, XIAN HUA M.
21111339000930	1/1/1900 12:00:00 AM	ADDARIO, Patricia P
21111400000191	1/1/1900 12:00:00 AM	Addington, Alamgir J.
21111500150353	1/1/1900 12:00:00 AM	ADEDEJI, Stephanie
21111339001180	1/1/1900 12:00:00 AM	Adl-Zarabi, CARL T.
21111339001179	1/1/1900 12:00:00 AM	Adl-Zarabi, Sean A

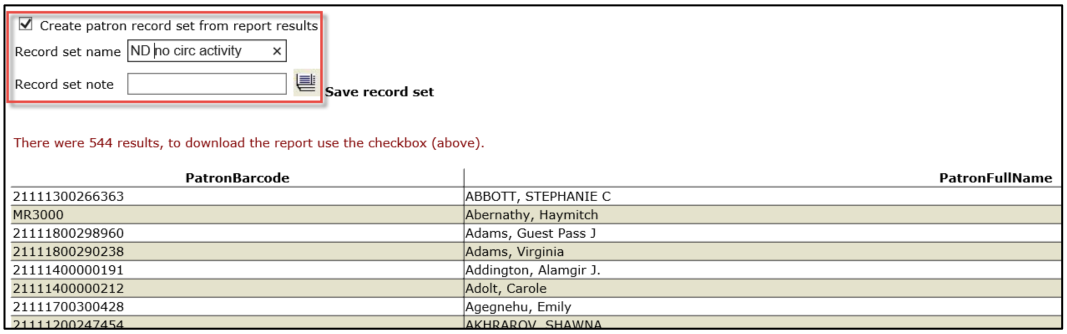
- Confirmation that the report is saved

Create a Record Set

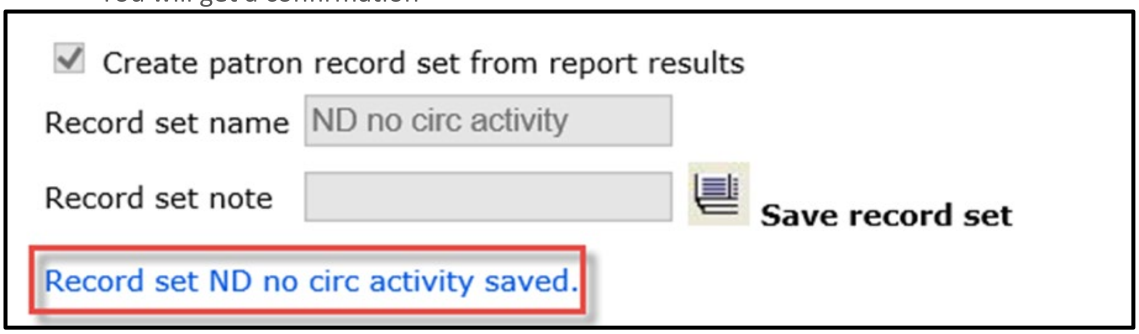
You can create a record set for bibliographic, item, authority and patron records, if you need to work with these records in the Polaris client.

- Check “Create item record set from report results”

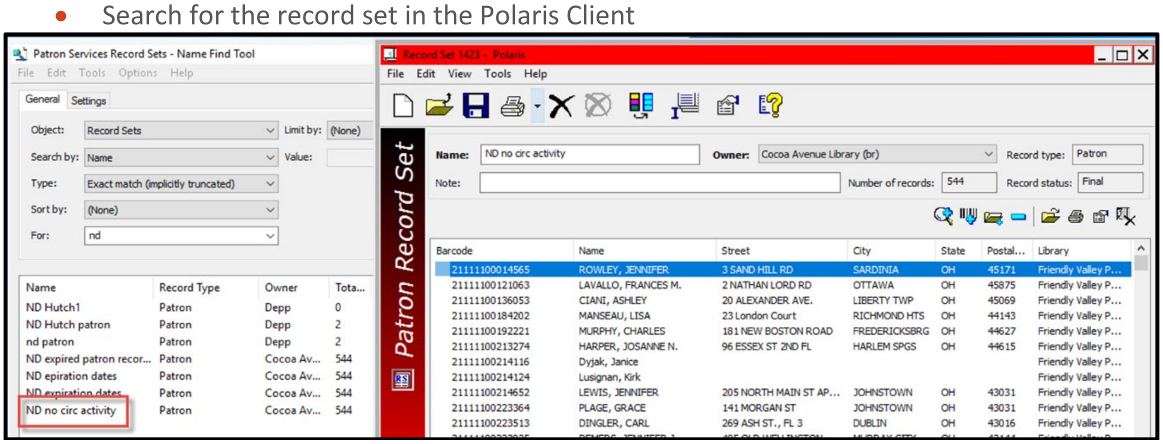
- Name the record set, save



- You will get a confirmation



- Search for the record set in the Polaris Client



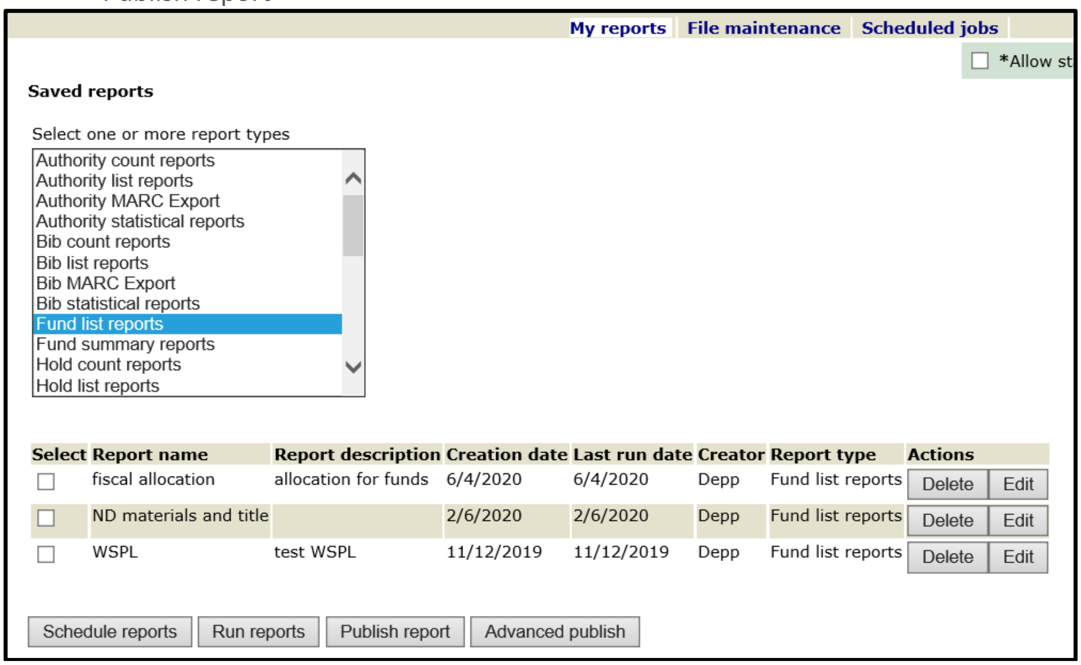
My Reports Tab

To manage your reports, select "My Reports" tab
There are three tabs:

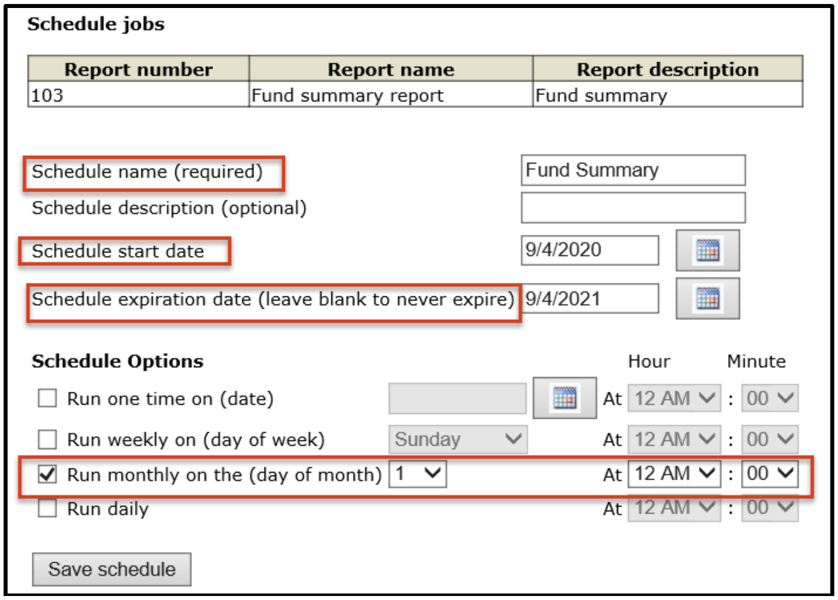
- My Reports
- File Maintenance
- Scheduled Jobs

My Reports: To access your saved reports. You need to know the type of report
There are options to:

- delete the saved report or edit each report
- Schedule reports
- Run reports
- Publish report

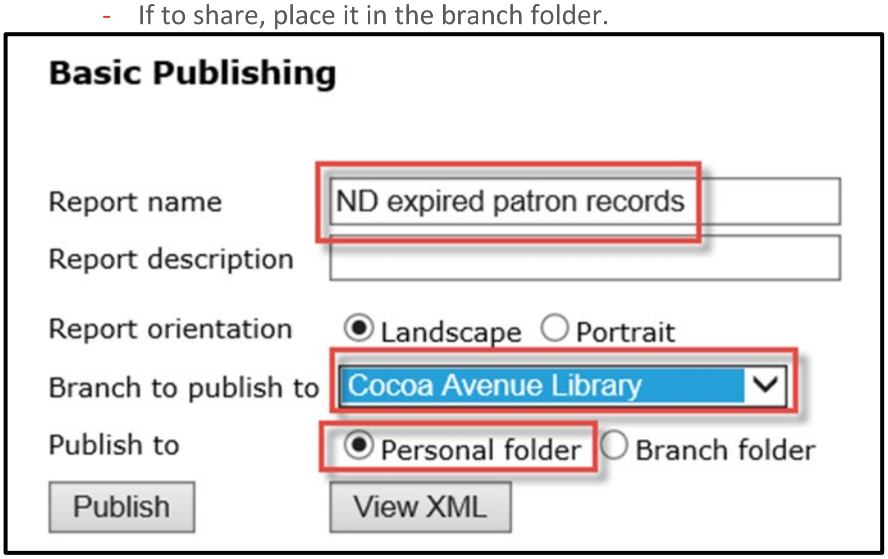


Schedule reports
Fill in appropriate fields | Save



Publish Report: The reports can be published to Polaris toolbar reports.

- Select the report you would like to publish and click publish report.
- The report name is automatically populated from your report.
- Select how the report to be oriented: landscape or portrait.
- Choose your branch. Is this report just for you or to share with others?
    - If it is for you, place in the personal folder.
    - If to share, place it in the branch folder.



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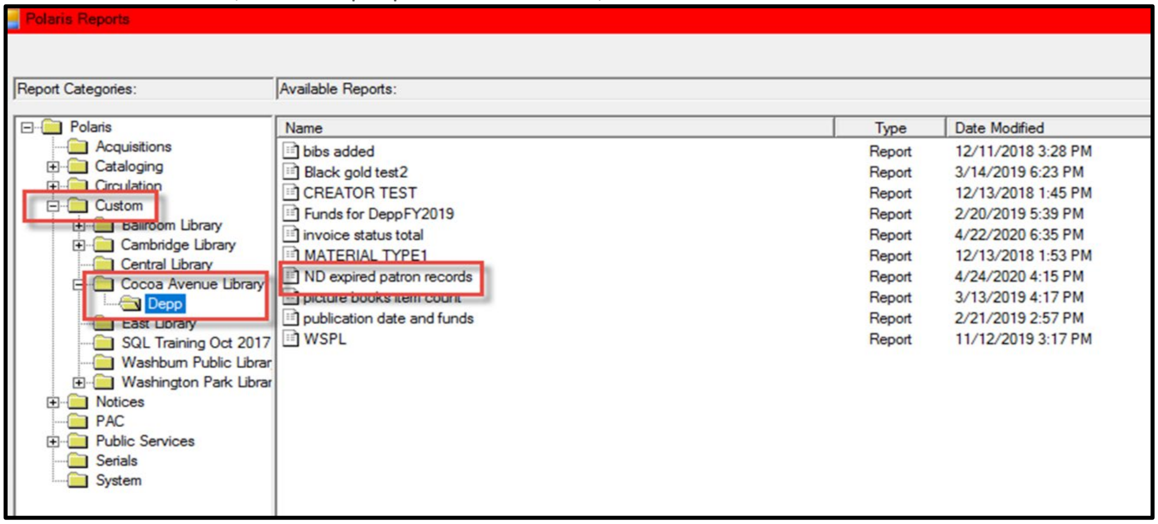
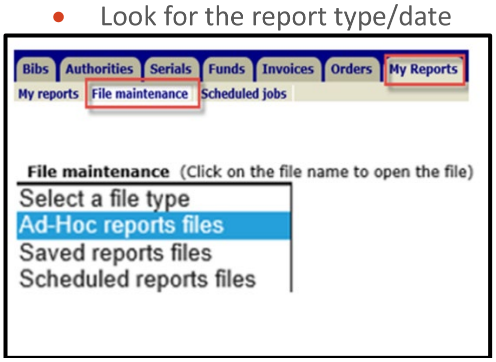
In the Polaris Client, Utilities | reports and notices, select Custom folder.

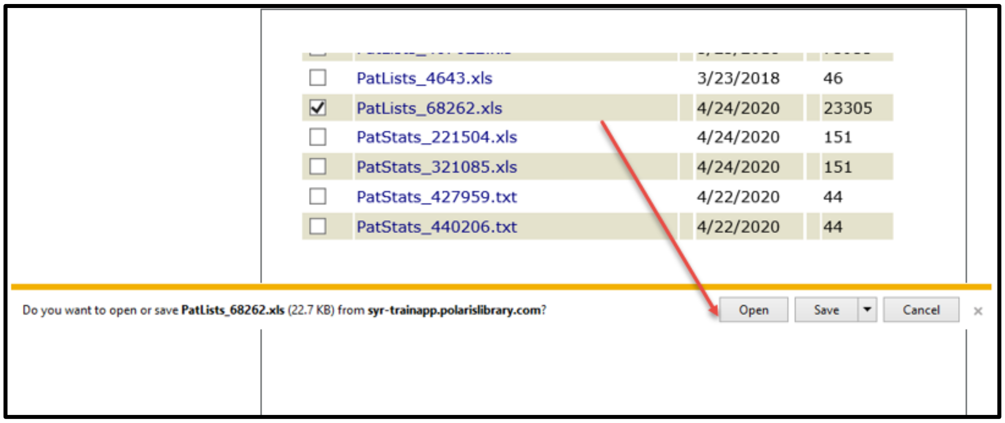


File Maintenance:

- Select Ad-Hoc reports file to open a report that was not saved
- Look for the report type/date

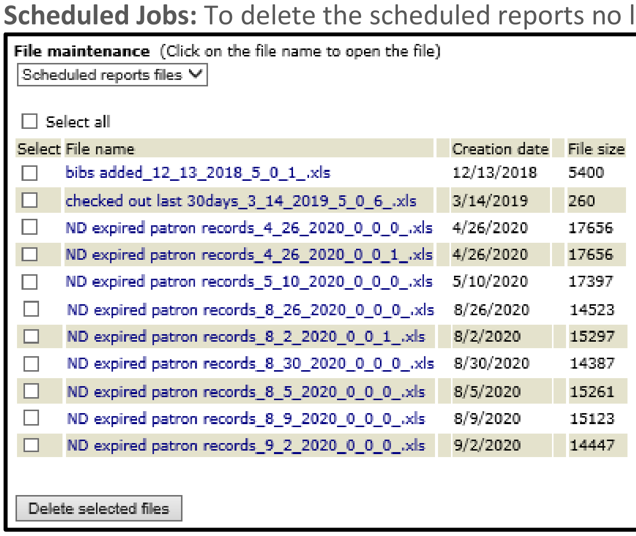


- Click the blue link to open the report



- Select Saved reports File to delete the saved reports

Scheduled Jobs: To delete the scheduled reports no longer needed


File maintenance (Click on the file name to open the file)

Scheduled reports files

☐ Select all

Select	File name	Creation date	File size
☐	bibs added_12_13_2018_5_0_1_.xls	12/13/2018	5400
☐	checked out last 30days_3_14_2019_5_0_6_.xls	3/14/2019	260
☐	ND expired patron records_4_26_2020_0_0_0_.xls	4/26/2020	17656
☐	ND expired patron records_4_26_2020_0_0_1_.xls	4/26/2020	17656
☐	ND expired patron records_5_10_2020_0_0_0_.xls	5/10/2020	17397
☐	ND expired patron records_8_26_2020_0_0_0_.xls	8/26/2020	14523
☐	ND expired patron records_8_2_2020_0_0_1_.xls	8/2/2020	15297
☐	ND expired patron records_8_30_2020_0_0_0_.xls	8/30/2020	14387
☐	ND expired patron records_8_5_2020_0_0_0_.xls	8/5/2020	15261
☐	ND expired patron records_8_9_2020_0_0_0_.xls	8/9/2020	15123
☐	ND expired patron records_9_2_2020_0_0_0_.xls	9/2/2020	14447

Delete selected files