



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>>

User name

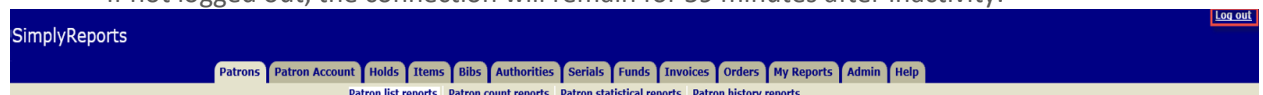
(username@domain or domain\username)

Password

Log in

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

Training

- **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.

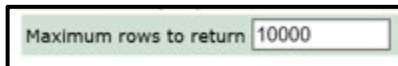
Counts and statistics are available for all records except order, fund and invoice records. The order, fund and invoice records have the summary reports instead.

- **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

Training

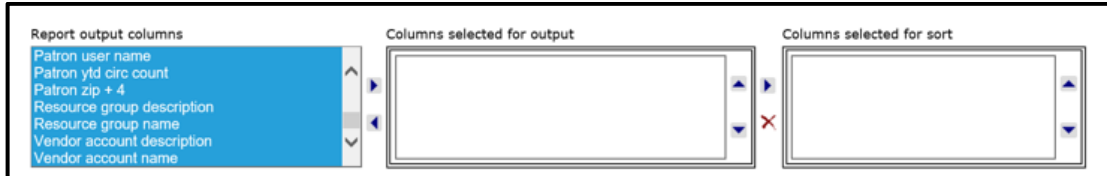
Maximum Rows to Retain: The default number can be changed.

A screenshot of a web form with a label "Maximum rows to return" and a text input field containing the value "10000".

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.

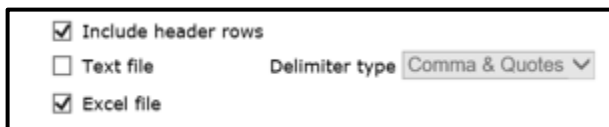
Column Selected for Sort: To sort the report results

A screenshot of a report configuration interface. It features three main sections: "Report output columns" on the left, "Columns selected for output" in the middle, and "Columns selected for sort" on the right. The "Report output columns" list includes "Patron user name", "Patron ytd circ count", "Patron zip + 4", "Resource group description", "Resource group name", "Vendor account description", and "Vendor account name". The "Columns selected for output" and "Columns selected for sort" sections are currently empty, with arrows indicating the flow of selection between them.

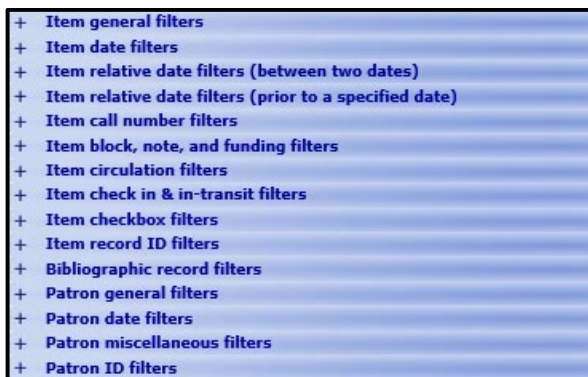
Include header rows: To include a header row

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.

A screenshot of a form for selecting report options. It includes a checkbox labeled "Include header rows" which is checked. Below it are two radio buttons: "Text file" (unchecked) and "Excel file" (checked). To the right of the radio buttons is a "Delimiter type" dropdown menu currently set to "Comma & Quotes".

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.

A screenshot of a list of report filters. The list is titled with a plus sign and includes the following categories: "Item general filters", "Item date filters", "Item relative date filters (between two dates)", "Item relative date filters (prior to a specified date)", "Item call number filters", "Item block, note, and funding filters", "Item circulation filters", "Item check in & in-transit filters", "Item checkbox filters", "Item record ID filters", "Bibliographic record filters", "Patron general filters", "Patron date filters", "Patron miscellaneous filters", and "Patron ID filters". Each item is preceded by a plus sign, indicating it can be expanded.

Statistical Report Workform

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

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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.

Item list reports Item count reports **Item statistical reports** Item history reports

☐ Run report now

Statistical Reports

Statistical categories: Check in Available subcategories: Activity summary

Report type: General Summary Detail level: Not applicable for this report type

Report focus:

☒ Run report by transacting organization only ☐ Include transacting user detail ☐ Include transacting workstation detail

Library quick pick: Boland Libraries, Depp Library System, Lauren County Free Library, McClellan Library System, Ralston Library System, Schwarzer Libraries

Transacting branch: Ballroom Library (Branch), Bayview Public Library (Branch), Big Rock Public Library (Branch), Boland Libraries (Library), Cabrillo Point Public Library (Branch), Cambridge Library (Branch)

User: ann.lorish, Ask Us Email, AwesomeOne, BBlue, bnelson, Boland

Workstation: Ann-pc, Anonymous OPAC Workstation, chelberg2-It, clough-It, DEPP-LT2, GLSTRAINERB

☒ Date range Start date: End date: ☐ Relative date: Days ago and the report run date

☒ Include header rows ☐ Text file ☒ Excel file

Delimiter type: Comma & Quotes

Submit

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.

Message from webpage

Running large statistical reports may affect system performance. You can save the report and schedule it to run when the library is closed. Click Ok to run the report now. Click Cancel to cancel the report.

OK Cancel

To download reports

The format of the report has already been selected

- Click Download report Output

Training

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

Do you want to open or save PatLists_292475.xls (233 KB) from syr-trainapp.polarislibrary.com?

Open Save Cancel

Format in Excel

Do you want to open or save ItemCounts_231873.xls (816 bytes) from pls-trainapp?

Open Save Cancel

| | A | B | C | D |
|----|------------|-----------|---------------|---|
| 1 | Collector | TotalItem | NumberOfItems | |
| 2 | | 4950.97 | 475 | |
| 3 | Audiobook | 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 | Nonfiction | 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/Blu-ray | \$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

ItemLists_398180 - Notepad

File Edit Format View Help

```

["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"

Training

- The report description is optional

☐ Download report output

☒ Save report parameters for later use

Report name

Report description ☒ 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

Your report: 'patron codes' has been saved.

☐ Download report output

☒ Save report parameters for later use

Report name

Report description ☒ Save report parameters

☐ Create patron record set from report results

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"


Training

- Name the record set, save

☒ Create patron record set from report results

Record set name x

Record set note

 Save record set

There were 544 results, to download the report use the checkbox (above).


| PatronBarcode | PatronFullName |
|----------------|-----------------------|
| 21111300266363 | ABBOTT, STEPHANIE C |
| MR3000 | Abernathy, Haymitch |
| 21111800298960 | Adams, Guest Pass J |
| 21111800290238 | Adams, Virginia |
| 21111400000191 | Addington, Alamgir J. |
| 21111400000212 | Adolt, Carole |
| 21111700300428 | Agegehu, Emily |
| 21111200247454 | AKHRAROV, SHAWNA |

- You will get a confirmation

☒ Create patron record set from report results

Record set name

Record set note

 Save record set

Record set ND no circ activity saved.

- Search for the record set in the Polaris Client

Patron Services Record Sets - Name Find Tool

General Settings

Object: Record Sets Limit by: (None)

Search by: Name Value:

Type: Exact match (implicitly truncated)

Sort by: (None)

For: nd

| Name | Record Type | Owner | Tota... |
|----------------------------|-------------|-------------|---------|
| ND Hutch1 | Patron | Depp | 0 |
| ND Hutch patron | Patron | Depp | 2 |
| nd patron | Patron | Depp | 2 |
| ND expired patron recor... | Patron | Cocoa Av... | \$44 |
| ND expiration dates | Patron | Cocoa Av... | \$44 |
| ND no circ activity | Patron | Cocos Av... | \$44 |

Record Set 1433 - Polaris

Name: ND no circ activity Owner: Cocoa Avenue Library (br) Record type: Patron

Note: Number of records: 544 Record status: Final

| Barcode | Name | Street | City | State | Postal... | Library |
|----------------|---------------------|-------------------------|----------------|-------|-----------|----------------------|
| 2111100014865 | ROWLEY, JENNIFER | 3 SAND HILL RD | SARDINIA | OH | 45171 | Friendly Valley P... |
| 21111000121063 | LAVALLO, FRANCES M. | 2 NATHAN LORD RD | OTTAWA | OH | 45075 | Friendly Valley P... |
| 21111000136053 | CIANI, ASHLEY | 20 ALEXANDER AVE. | LIBERTY TWP | OH | 45069 | Friendly Valley P... |
| 21111000184202 | MANEAU, LISA | 23 London Court | RICHMOND HTS | OH | 44143 | Friendly Valley P... |
| 21111000192221 | MURPHY, CHARLES | 181 NEW BOSTON ROAD | FREDERICKSBURG | OH | 44627 | Friendly Valley P... |
| 21111000213274 | HARPER, JOANNE N. | 96 ESSEX ST 2ND FL | HARLEM SPGS | OH | 44615 | Friendly Valley P... |
| 21111000214116 | Dyjak, Janice | | | | | Friendly Valley P... |
| 21111000214124 | Luisigan, Kirk | | | | | Friendly Valley P... |
| 21111000214652 | LEWIS, JENNIFER | 205 NORTH MAIN ST AP... | JOHNSTOWN | OH | 43031 | Friendly Valley P... |
| 21111000223364 | PLAGE, GRACE | 141 MORGAN ST | JOHNSTOWN | OH | 43031 | Friendly Valley P... |
| 21111000223513 | DINGLER, CARL | 269 ASH ST., FL 3 | DUBLIN | OH | 43016 | Friendly Valley P... |

My Reports Tab

To manage your reports, select "My Reports" tab

There are three tabs:

- My Reports
- File Maintenance
- Scheduled Jobs

Training

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

My reports | **File maintenance** | **Scheduled jobs**

☐ *Allow st

Saved reports

Select one or more report types

Authority count reports

Authority list reports

Authority MARC Export

Authority statistical reports

Bib count reports

Bib list reports

Bib MARC Export

Bib statistical reports

Fund list reports

Fund summary reports

Hold count reports

Hold list reports

| Select | Report name | Report description | Creation date | Last run date | Creator | Report type | Actions |
|--------------------------|------------------------|----------------------|---------------|---------------|---------|-------------------|-----------------------|
| <input type="checkbox"/> | fiscal allocation | allocation for funds | 6/4/2020 | 6/4/2020 | Depp | Fund list reports | <div>DeleteEdit</div> |
| <input type="checkbox"/> | ND materials and title | | 2/6/2020 | 2/6/2020 | Depp | Fund list reports | <div>DeleteEdit</div> |
| <input type="checkbox"/> | WSPL | test WSPL | 11/12/2019 | 11/12/2019 | Depp | Fund list reports | <div>DeleteEdit</div> |

Schedule reports

Run reports

Publish report

Advanced publish

Schedule reports

Fill in appropriate fields | Save


Training


Schedule jobs

| Report number | Report name | Report description |
|---------------|---------------------|--------------------|
| 103 | Fund summary report | Fund summary |


Schedule name (required)

Schedule description (optional)

Schedule start date 

Schedule expiration date (leave blank to never expire) 

Schedule Options

☐ Run one time on (date)  At :

☐ Run weekly on (day of week) At :

☒ Run monthly on the (day of month) At :

☐ Run daily At :

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.

Basic Publishing

Report name

Report description

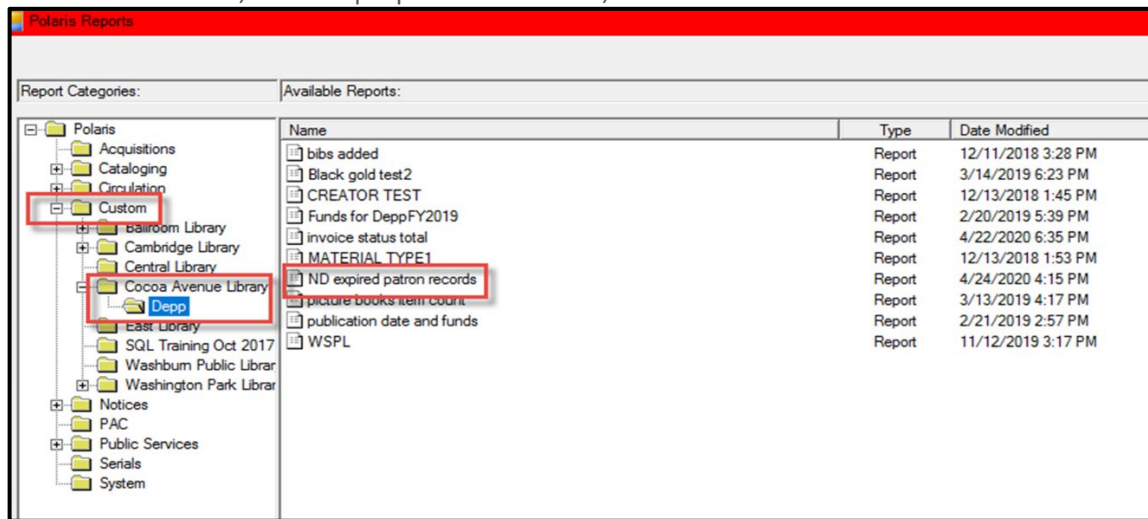
Report orientation ☒ Landscape ☐ Portrait

Branch to publish to 

Publish to ☒ Personal folder ☐ Branch folder

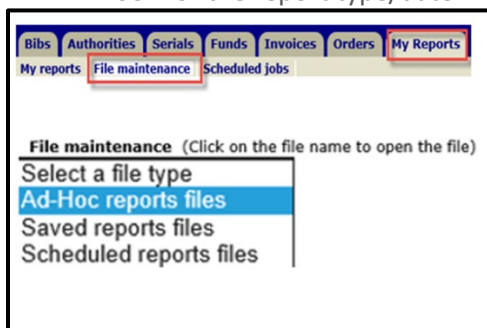
Training

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



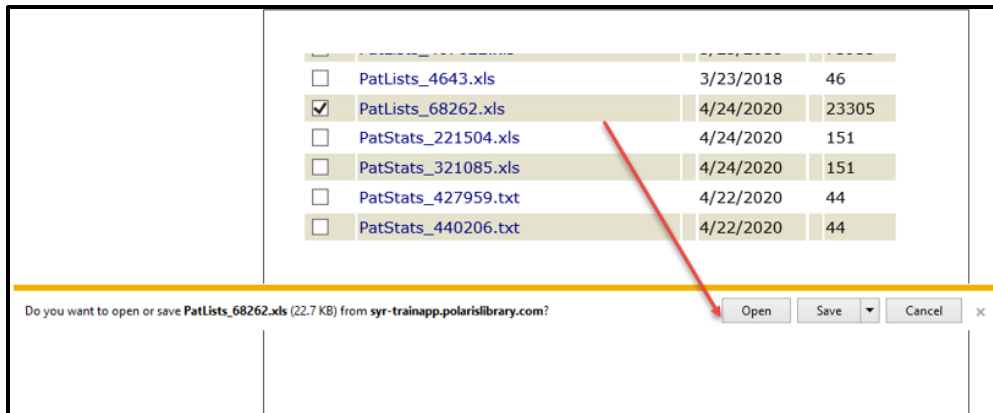
File Maintenance:

- 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

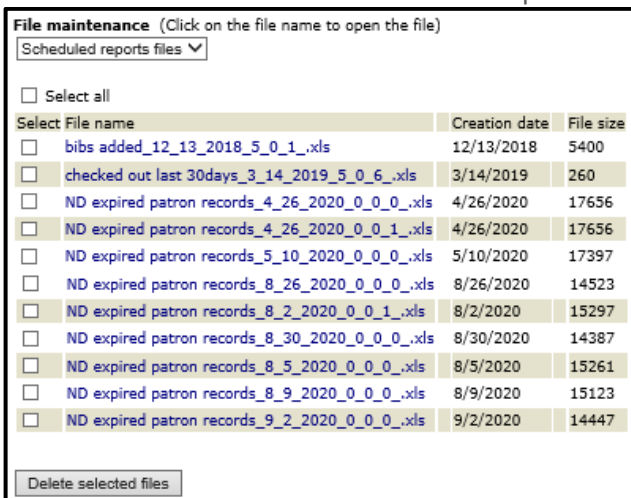
Training



- Select Saved reports File to delete the saved reports



Scheduled Jobs: To delete the scheduled reports no longer needed



Training

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