Training

POLARIS SIMPLY REPORTS

Overview

Navigation:

- Uses tabbed navigation—each main tab represents the category of information that is used to query to create the report
    - 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 (status) and patron registration records
    - Items--Data from item records and their linked patron account (status), patron registration and bib records
    - Bibs--Data from bib records and their linked items
    - Authorities--data from authority record and 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 and fiscal year records and 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
    - My reports
    - Admin
    - Help

- Uses subtabs—further refine the type of report
    - List reports—e.g., a list of patrons that do not have an email address
    - Count reports—a count of data elements e.g., # of patrons registered at a branch
    - Statistical reports—reports are based on the transactions in the transaction database e.g., item stat report that shows the number of checkouts and renewals for the current year
    - Summary reports—available for summarizing acquisitions data from funds, invoice and PO records data based on funds (only a list and summary subtab)
    - History reports—data showing transactions for a specific patron or item (permission based) Ask Polaris to enable if it does not show

- Specify the number of rows and address type

- Columns
    - The columns represent the Polaris database columns—select data elements for inclusion in the report
    - For a list of all the columns available, click help (button) on the list or count subtab, and click the database columns link
        - "Report output columns" --first box shows all data elements
        - "Columns selected for output"--second box shows selected elements
        - "Columns selected for sort"--third box shows sort order (can use secondary sorts)
    - Can include header rows
    - The preview report will be returned in HTML format by default, but text file/delimiter type or Excel can be chosen for download
    - "Report Filters"
        - Filters will vary depending on the type of report being generated—use patron as an example
        - For a list of all the filters available click help on a list or count subtab and click filters link
        - **Filtering by fiscal year**--used in fund, order and invoice reports
        - **Filtering by counts or amounts**, (< or = to and > or = to) e.g. Patron/Patron misc. filter/charges
        - **Filtering by missing data**—limits the report output without this value, e.g., Patron/Patron misc. filter/email address
        - **Filtering by a library/organizations/branches**—Library quick pick—includes all the branches for that library
        - **Filtering by date ranges**—limit the report output to a specified time period between FROM and TO dates, e.g., patron registration date. Patron/Patron date filters/patron registration date
        - **Filtering by Dates Relative to a report run date**
            - Between relative date filters—time period beginning a specified number of days, months or years before the report run date and ending with the report run date, e.g., items created within 4 months of the run date
            - More than relative date filters—the action was taken earlier than a specified number of days , months or years before the report run date, e.g., items circulated three years before the run date
        - **Filtering by check box settings and data fields**—some filters limit the report output based on whether a specific check box is checked or unchecked in a work form or a date is or is not present, e.g., holdable box in an item record,
    - Submit button at the top and bottom of screen to preview the report
    - The preview window displays the first 1,000 rows and the total count of all the rows that will be in the report
    - Edit and preview the report output as many times as necessary before downloading or saving the report parameters

- To modify a report, simply close the preview window and change report criteria

- From the Preview window;
    - "Downloading report results"
    - When downloading from Excel, may need to reformat columns if they do not come over correctly

- "Save report parameters for later use"
    - Define a report name and report description
    - Saving the parameters, not the report itself—saving the parameters for later use

- "Create record set from report results"
    - Creates record sets within Polaris for list or bulk change purposes
    - Only available with list reports

- Statistical reports
    - **CAUTION** when running statistical reports, the transaction database is being used
    - Places a great demand on the database server
    - For every type of transaction to be included in a statistical report, transaction logging must be set to Yes in Transaction Logging database table
    - The Run report now check box is unchecked by default
    - By default, statistical reports are saved and run at a scheduled time
    - The System Administrator can choose to turn on "Run report now"—but be very careful as this may slow Polaris performance
    - Creating a statistical report:
        - Select a statistical category
        - Select a subcategory—available subcategories are dependent on the selected category
        - Select a filter—available filters depend on the subcategory
    - Select a stat report type and detail level—by selecting a report type, the list in the Detail level may display options for the type of report, or it may display not applicable for this type of report
        - General summary—Displays the transaction totals without chronological breakdown—no details
        - Monthly—Displays the transaction totals broken down by month—detail level include:
            - Month—Selecting only month will result in aggregation of monthly totals over multiple years
            - Year & month—Displays number of month and year
        - Daily—Displays the transaction totals broken down by day of month—detail level include:
            - Day—selecting only day will result in the aggregation of daily totals over multiple years
            - Month & Day—aggregation of totals over multiple months and day
            - Year, Month & Day
        - Yearly--Displays the year and the transaction totals—no details
        - Hourly—transactions broken down by hour—detail levels include:

        - Hour—total number of transactions per hour
        - Day & Hour—Selecting only Day & Hour will result in the aggregation of hourly totals over multiple months and years
        - Month, Day & Hour—will result in aggregation of totals over multiple years
        - Year, month, day & hour
    - Day of week—displays transaction totals broken down by day of the week—Detail levels:
        - Day of week
        - Month & day of week
        - Year & day of week
        - Day of week by hour
  - Selecting the statistical filter
    - Filter by transacting branch—select branch or branches
        - Include branch name
        - Include branch abbreviation
        - Include branch ID
        - Combine branch totals
    - Filter by workstation/user
        - Include transacting user detail
        - Include transacting workstation detail
    - Filter by date—can include transactions for a specific date range or for a time period relative to the report run date
    - Other filters—available filters depend on the selected subcategory

Working with Saved and Scheduled Reports:

- Under the “Saved reports” tab/Saved reports subtab
  - To run a saved report:
    - Select one or more report types in the Saved reports box and reports appear in “Select Report Name” list
    - Select the report(s) to run and click run reports
    - When report(s) is done, it can be downloaded using the link at the end of the report

  - To schedule reports:
    - Select one or more report types in the Saved reports box and reports appear in the “Select Report Name” list
    - Select the report(s) to schedule and click the schedule reports button
        - ✓ Schedule name is required
        - ✓ Schedule start date
        - ✓ Schedule expiration date—not required, can run indefinitely
        - ✓ Fill in schedule options
        - ✓ Click save schedule

    - The scheduled jobs subtab allows all scheduled reports to be viewed—their schedule can be edited or deleted from here.
  - To view published reports:
    - A published report appears in the custom folder of Reports & Notices on the Polaris tool bar
    - This is an optional feature and a license must be purchased (now included in the price)
    - Select one or more report types in the Saved reports box and reports appear in the “Select Report Name” list
    - Select the report(s) to be published and click the publish reports button
      - ✓ Fill in the report name as you want it to show in the tool bar
      - ✓ If published to a personal folder, the User ID is the folder name
      - ✓ Fill in other info and click publish

- File maintenance:
  - Allows you to delete accumulated output files
    - Select a file type in the File maintenance box
    - Select the reports below to delete

Administration:

The admin. sets the security, sets or changes application defaults, maintains the master schedule and edits the available columns for the reports

- Security
  - To add a new user—select name in Polaris defined users and pull over into SimplyReports users
  - Active directory determines direct access—log into network, you will have direct access to Simply Reports when logging in
  - Many sites use a generic login to the network so that multiple users can get into Simply Reports
    - The default is for full privileges
    - Modify privileges by selecting name and clicking edit—can limit by type of data or library/branch
    - Can designate technical users from normal users here (technical users see all columns/normal users see a subset of columns)

- Application Defaults
  - Shows default parameters for the SimplyReports application
    - May want to change “Allow statistical reports overrides” and “Allow users to share reports”

- Master Schedule Maintenance
  - Allows the administrator to edit or delete reports for all users

- Scheduling Hours Administration
  - Determines the hours reports can be run
  - If the hours are changed, the change does not affect previously scheduled reports

- SimplyReports Content Administration
  - Allow the administrator to change column names and how they are displayed in reports
    - Select report type
    - Select report output column
    - Click edit
    - Change the “Column name display in list box” and “Column name printed on report”

  - Defines what columns display to technical users and normal users
  - Allows removal columns never used
    - Use X by “Report output columns” box
  - Allows adding of needed columns
    - Not every column is available in SimplyReports
    - Adding columns is for advanced users, SQL knowledge is helpful