



POLARIS REPORTS

How to Generate Reports

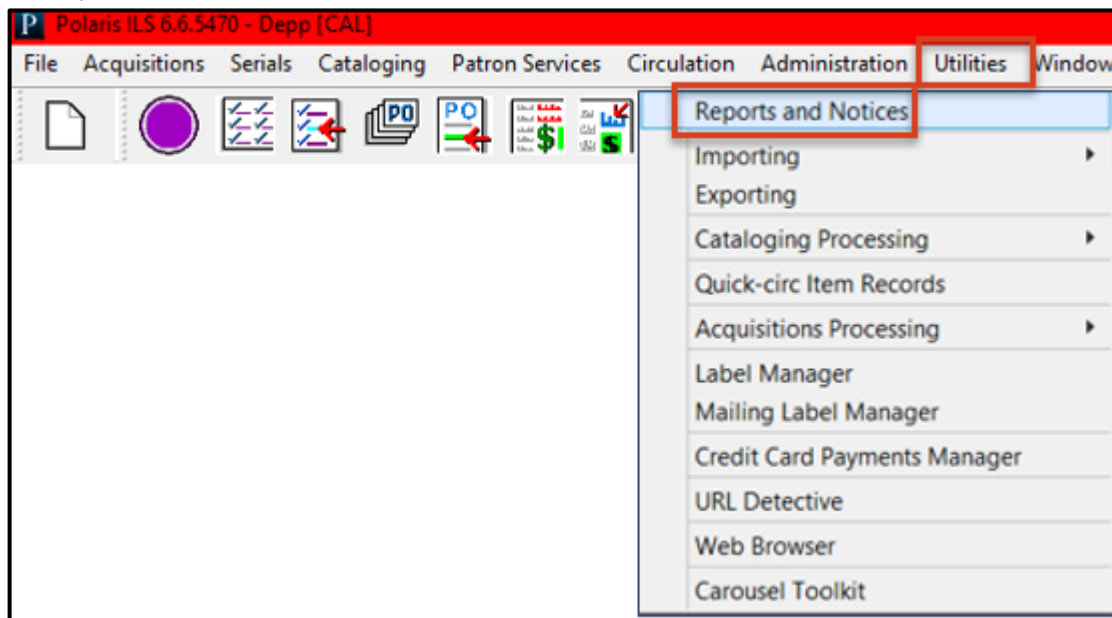
Polaris provides many standard and customizable reports to help you track all aspects of library activities. The default output format for a report is a PDF file, or you can choose HTML 4.0, MHTML, Excel, or Comma Separated Values (CSV). (Depending on the data in the report, the additional formats such as Excel and HTML may not produce the results you expect.)

- To generate, print, or customize reports, the staff must have the Access reports and notices permission
- Adobe® Reader® needs to be installed on any workstation that runs reports, notices and many staff client printing tasks
- Consideration should be given to appropriate times to run reports in order to avoid slowing down the system

Toolbar Menu
































Reports are found under the Utilities menu

Access to Reports and Notices is an all or nothing permission with acceptance of restricting to Library or Branch level



Training

When the Polaris Reports window opens the left pane shows the report categories and the right pane lists available subfolders and individual reports by subsystem

Report Categories:	Available Reports:		
 Polaris	Name	Type	Date Modified
 Acquisitions	 Ballroom Library	Folder	5/22/2020 2:37 PM
 Cataloging	 Cambridge Library	Folder	4/23/2020 2:34 PM
 Circulation	 Central Library	Folder	3/14/2018 1:12 PM
 Holds	 Cocoa Avenue Library	Folder	6/4/2020 3:32 PM
 ILL	 East Library	Folder	4/16/2018 1:53 PM
 INN-Reach	 SQL Training Oct 2017	Folder	10/12/2017 2:44 PM
 Custom	 Washburn Public Library	Folder	2/7/2017 1:58 PM
 Ballroom Library	 Washington Park Library	Folder	12/1/2017 11:42 AM
 Cambridge Library	 Circ by Collection Matrix RS	Report	4/2/2017 1:17 PM
 Central Library	 Circ by Patron Code RS	Report	4/2/2017 9:51 AM
 Cocoa Avenue Library			
 East Library			
 SQL Training Oct 2017			
 Washburn Public Librar			
 Washington Park Librar			
 Notices			
 PAC			
 Public Services			
 Serials			
 System			

Steps for Generating a Report

- Select the subsystem folder for the required report
- Double click the report name to open the Report Wizard
- Select organizations, dates and any other needed parameters
- Set sort if available
- Click Submit to produce the Report Preview Window

Training

Report Wizard - Item Circulation By Collection

Parameters

Start Date:
September 04, 2020 12:00:00 AM

End Date:
September 04, 2020 11:59:59 PM

Organization:
<All>
Ballroom Library (CBL)
Bayview Public Library (BPL)
Big Rock Public Library (BRPL)
Cabrillo Point Public Library (CPPL)
Cambridge Library (CACL)
Central Library (MLCL)
Clearfield Public Library (CLPL)
Cocoa Avenue Library (CAL)
Conservatory Library (CCL)
Creamery Building Library (MCBL)
Depew Public Library (DPPL)

Submit Cancel

Save, Print or E-mail

By default, the report will be displayed in PDF format with options to save, print (all pages or just selected ones) or e-mail the report

There are sticky notes and highlighter tools available in this format

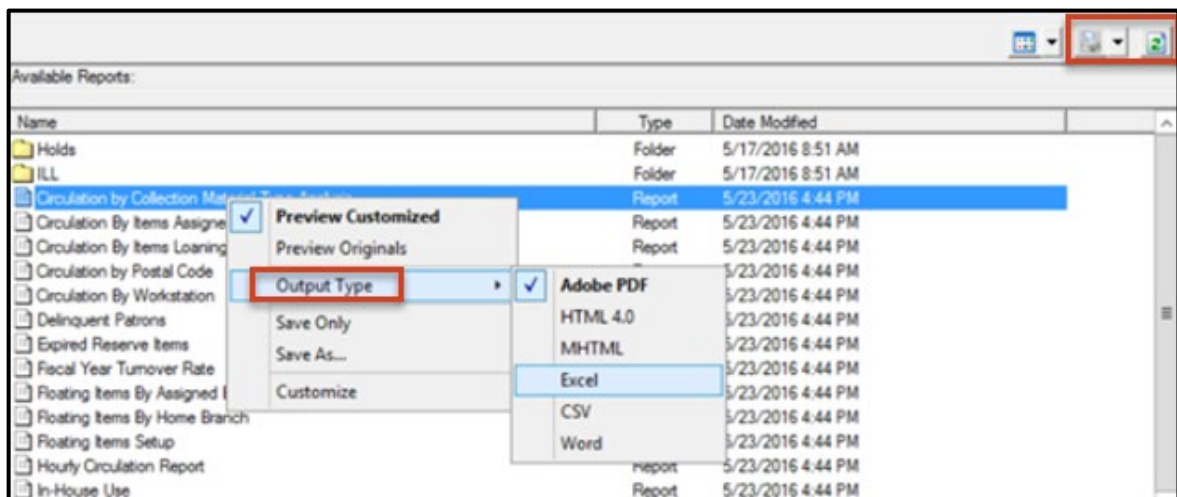
The report will stay in the cache for approximately 30 minutes, causing a repeat generation to possibly produce the same results even when other data is available

Bibliographic Records That Do Not Display In PAC

Bib ID	Title	Author	Format	Record Status	# Of Items
98	Prime rip	Swanson, Wayne, 1951-	Book	Final	1
113	A perfect stranger	Steel, Danielle.	Book	Final	2
170	The picnic and other inimitable stories	Durrell, Gerald, 1925-1995.	Book	Final	2
174	A private life : a novel	Seton, Cynthia Propper.	Book	Final	1
231	The patchwork pattern book	Houck, Carter.	Book	Final	1
10899	The doctor game : a novel	Olgin, Howard A., 1939-	Book	Final	0
14137	Doctor, lawyer ...	Wilcox, Collin.	Book	Final	0

Output Options

- PDF is the default output option but there are other formats available
 - PDF – some printers, without an appropriate driver may not be able to print these documents successfully
 - HTML – useful for large reports as it is faster than PDF
 - MHTML – Mime HTML with ability to include links
 - Excel – Excel should be loaded on the PC or server to view the report immediately
 - There will be a choice to save to another location if Excel is not available
 - CSV – Comma Separated Values – a simple plain text format
 - Word – Word must be loaded on the PC or server to view the report immediately. There will be a choice to save to another location if Word is not available
- To change the output format either use the down arrow by the Report Output icon or right click on the report and select from the Output Type submenu
- If you have difficulty generating a report, click the Refresh Reports icon to the left of the Report Output icon



Custom Folder

- To copy a report to the Custom folder, select the toolbar report, right click and select Customize from the context menu
- The copied toolbar report may be customized using the Reporting Services website
- Customized reports will not be overwritten during upgrades
- SimplyReports also allows reports to be saved to this location by “publishing” the desired report and further customization may take place from the Reporting Services website

Training

Name	Type	Date Modified
Holds	Folder	5/17/2016 8:51 AM
ILL	Folder	8/15/2016 2:36 PM
INN-Reach	Folder	11/8/2017 3:32 PM
Circulation by Collection Material Type Analysis	Report	8/17/2020 10:39 AM
Circulation By Items Assigned Branch	Report	8/17/2020 10:39 AM
Circulation By Items Loaning Branch	Report	8/17/2020 10:39 AM
Circulation by Postal Code	Report	8/17/2020 10:39 AM
Circulation By Workstation	Report	8/17/2020 10:39 AM
Delinquent Patrons	Report	8/17/2020 10:39 AM
Expired Reserve Items	Report	8/17/2020 10:39 AM
Fiscal Year Turnover R	Report	8/17/2020 10:39 AM
Floating Items By Assign	Report	8/17/2020 10:39 AM
Floating Items By Home	Report	8/17/2020 10:39 AM
Floating Items Setup	Report	8/17/2020 10:39 AM
Hourly Circulation Rep	Report	8/17/2020 10:39 AM
In-House Use	Report	8/17/2020 10:39 AM
Item Circulation By Col	Report	8/17/2020 10:39 AM
Item Circulation By Item	Report	8/17/2020 10:39 AM
Item Circulation Statistics	Report	8/17/2020 10:39 AM

Help – Using Polaris Standard Reports

The Using Polaris Standard Reports section of the Polaris Basic Topics guide includes step-by-step instructions for generating, sending and customizing toolbar reports

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Training

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