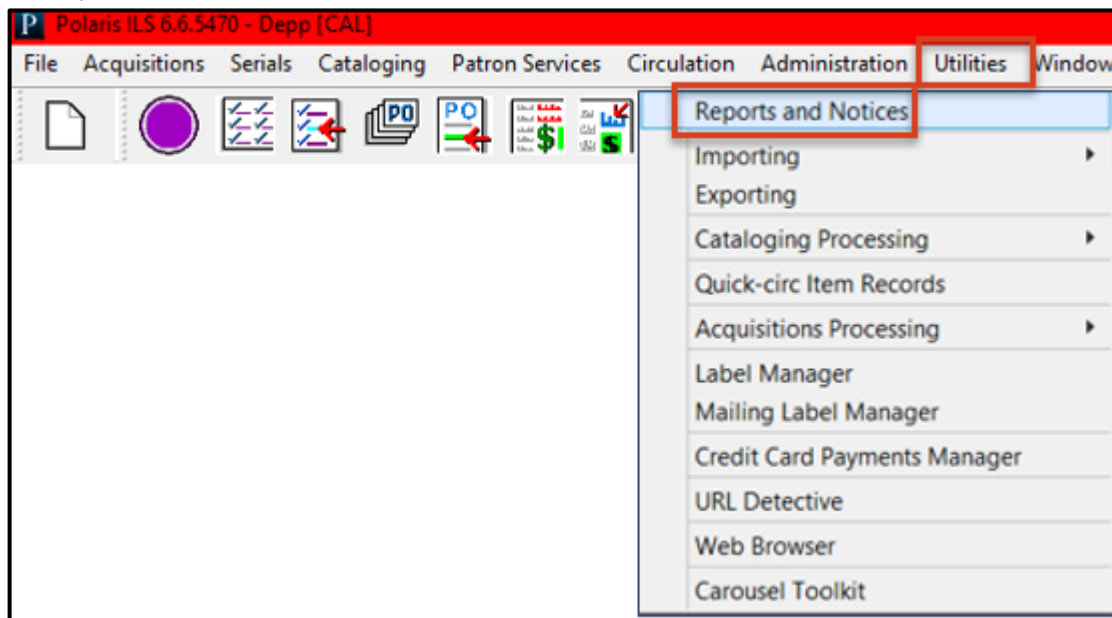# Training

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 acceptation of restricting to Library or Branch level

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

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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

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
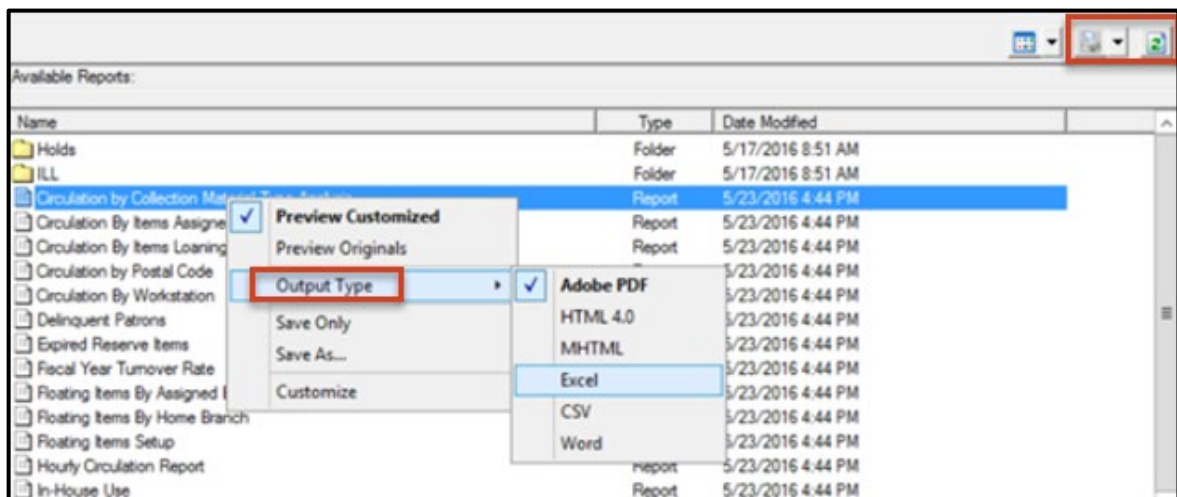
Custom Folder

- 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

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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