

# Guide to SimplyReports

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# What is SimplyReports?

SimplyReports is a Polaris product that gathers data from the Polaris database, allowing you to create custom reports about your patrons, patron account transactions, holds, and items. SimplyReports provides you with information you would expect to find in Reports and Notices yet is more robust and gives you control over the content, order, and parameters.

## **First, you select the category:**

- Patron
- Patron Account
- Holds
- Items
- Serial Holdings
- Bibs

## **Second, you select the type of report:**

- List (a list of your report criteria)
- Count (a count only of your report criteria)

## **Third, select:**

- Columns (fields) for display
- Sort order of those columns (fields)

## **Fourth, select:**

- Filters. Filters limit results and may include, depending on the category: date ranges, collection codes, patron codes, assigned library, patron registered library, statistical codes, circulation status, item codes, call number ranges, etc.

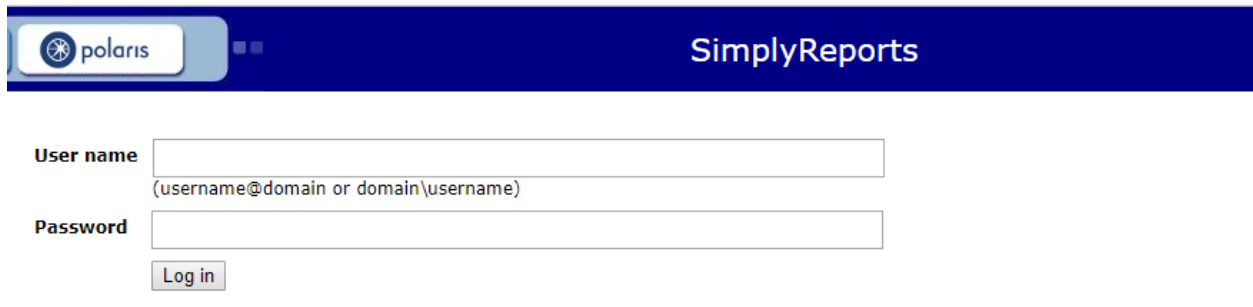
Once the report is submitted, it can be viewed and printed or downloaded into Excel. A Record Set can also be created from your results. The report can also be saved for later use by publishing it to your Custom report folder.

# Accessing SimplyReports

Log in to SimplyReports, by going to: <http://ihlsrpts.illinoisheartland.org/SimplyReports>

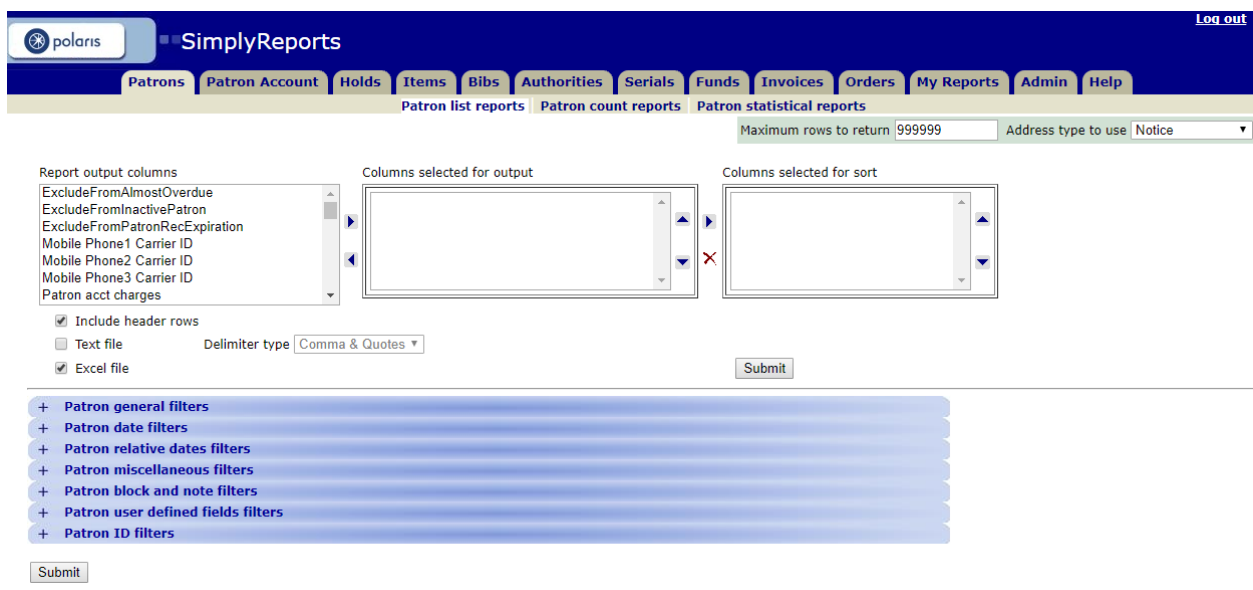
Use your Polaris login and password to log in to SimplyReports. You must request access to SimplyReports by entering a Helpdesk ticket.

Note: SimplyReports can be accessed from any computer with any browser. The computer does not need to have Polaris on it.



The login form features a dark blue header with the Polaris logo on the left and the text "SimplyReports" on the right. Below the header, there are two input fields: "User name" and "Password". The "User name" field has a placeholder text "(username@domain or domain\username)". Below the "Password" field is a "Log in" button.

Enter your Polaris user name and password, then click the [Log in] button. After logging in, you will see the following window:



The main interface has a dark blue header with the Polaris logo and "SimplyReports" text, and a "Log out" link on the right. Below the header is a navigation bar with tabs for "Patrons", "Patron Account", "Holds", "Items", "Bibs", "Authorities", "Serials", "Funds", "Invoices", "Orders", "My Reports", "Admin", and "Help". Underneath, there are sub-tabs for "Patron list reports", "Patron count reports", and "Patron statistical reports". The interface includes a "Maximum rows to return" field set to "999999" and an "Address type to use" dropdown menu set to "Notice". There are three main sections: "Report output columns" with a list of fields, "Columns selected for output" (an empty list), and "Columns selected for sort" (an empty list). Below these are checkboxes for "Include header rows", "Text file" (with a "Delimiter type" dropdown set to "Comma & Quotes"), and "Excel file". A "Submit" button is located at the bottom right of this section. At the bottom of the page, there is a list of filter categories: "Patron general filters", "Patron date filters", "Patron relative dates filters", "Patron miscellaneous filters", "Patron block and note filters", "Patron user defined fields filters", and "Patron ID filters", each with a plus sign icon. A "Submit" button is also present at the bottom left of this section.

# Steps for Creating a Report

## 1. Select the category of the report.

The tabs across the top allow you to select the category of the report. Some of the tabs are blocked because running reports in this area slows down the performance of Polaris.

- **Patron** – use for information based on data in Patron Registration and Patron Status.
- **Patron Account** – use for information based on data in Patron Status, such as financial information and patron activity.
- **Holds** – use for information on hold requests including hold activity, item records, bib information and patron activity.
- **Items** – use for information on item records, linked bib records and linked patron records.
- **Bibs** – use for information on bibliographic records, linked item records and linked holds.
- **Authorities** – (NOT AVAILABLE)
- **Serials** – use for information on serials, holdings and issue information.
- **Funds** – use for information on acquisition fund records.
- **Invoices** – use for information on acquisition purchase order records.
- **Orders** – use for information on acquisition purchase order records.
- **My Reports** – this option allows you to access any saved reports.
- **Admin** – (NOT AVAILABLE)
- **Help tab** – access the SimplyReports online help index.

## 2. Select whether the report should be a list report or a count report.

- **List** – this type of report will list detailed information according to the columns you have chosen to display.
- **Count** – this type of report will only display counts for the columns you have selected.
- **Statistical** – (NOT AVAILABLE)

3. Check your default settings such as “Include header rows” or “Excel file”.

Include header rows  
 Text file      Delimiter type Comma & Quotes ▾  
 Excel file

4. Select the Columns (fields) you want included in your report.

The “Report output columns” list contains the columns (fields) in Polaris related to the category you have selected. Highlight the output column fields you want included in your report and click on the arrow to add it to the second column, “Columns selected for output” list.

The up and down arrows allow you to move the output column up and down the list. This is the order the columns will display on your report. To remove a column from your output list, highlight the line, click the left arrow, the column will be moved back to the end of the first column, “Report output columns” list.

5. Select the Sort Order (optional).

In the “Columns selected for output” list, highlight the fields that you want to sort the report by and then click the arrow key to move them to the “Columns selected for sort” list. You can include multiple fields to sort and you can change the order of the fields by clicking on the up and down arrows. You can delete a column from sort by clicking on the X button.

6. Select your filters.

Filter choices change depending on the category, but there will be several filters to choose from. Selecting the right filters allows you to limit your report to the correct results. To see what is under each filter section, click the + sign to expand the list. Clicking the – sign will close the list.

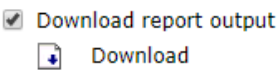
To select a filter, you must check the left box, and then type your selection in the field or pick a selection in the drop down menu.

7. [Click the \[submit\] button.](#)

A preview of your report will appear in a new window.

8. [Review the data.](#)

If the output is not what you want, close the window and make any necessary changes to selected settings, and submit again. When you get the desired output, select a method for saving the report:

- a. [Download report output.](#) When checking this option, a download button will appear. Click the download button. Once the file has finished downloading, double-click on it to open. You can then save the file to your local hard drive.  

- b. [Save report parameters for later use.](#) When checking this option, two blanks give you an opportunity to name the report and describe the report. Click Save report parameters.
- c. [Create patron \(item\) record set from report results.](#) When checking this option, two blanks give you an opportunity to name the record set and describe the record set. Click Save record set.

## 9. Accessing your reports.

- a. If you downloaded the report, after opening and saving it, you should access the report on your local hard drive.
- b. If you saved the report for later use:

Go to the SimplyReports tab "[My Reports](#)". Click the drop down menu and select the type of report that you created. Saved reports for that type will appear in a list.

For each report you can:

- a. Delete the report.
- b. Edit the report.
- c. Run the report (this gives you the opportunity to see the report in Excel).
- d. Publish the report (this saves the report in your custom folder so that it can be generated on an as-needed basis).

Note: If deleting or editing the report, be sure you click on the correct button before answering OK when prompted. The prompt for both appears identical in size and color except for the words "delete" and "edit".

- c. If you created a Patron Record Set, go to the main Polaris toolbar and click Patron Services / Record Sets. Search for your record set.

If you created an Item Record Set, go to the main Polaris toolbar and click Cataloging / Record Sets. Search for your record set.

## To Edit a Saved Report

You can edit all column and filter settings for saved Patron, Patron Account, Bib, Item, and Holds list and count reports.

### To edit a saved report:

1. Select the [My Reports](#) tab and select the [My reports](#) subtab.
2. Select the type of report you want to edit in the [Select one or more report types](#) box. The saved reports of this type are listed.
3. Select the check box next to a report in the list of saved reports.
4. Click "[Edit](#)" under Actions. A message asks if you are sure you want to edit this report. If you want to continue, click [OK](#).
5. The tabbed page for the selected report type opens. The report information at the top of the page is blue to indicate that you are editing a saved report. The filter options are expanded, and the column and filter options are displayed with the options set as they were when the report was saved. Note: Saved reports preserve the column selections but do not preserve the column order.
6. Change the column and filter selections as desired.
7. Click [Continue](#) to save the changes. The report Preview window opens but the report does not display, only the option to save.
8. Leave the report name unchanged to overwrite the previous version of the report or type a new name for the edited report.
9. Click the [Save report parameters](#) icon to save your edited report.



# Steps for Publishing a Report

When you publish reports created in SimplyReports, they appear in the Custom folder when you select Utilities/Reports and Notices/Custom/Your Library on the Polaris Tool bar.

To publish a report to the Custom folder so that it is available from the Polaris Tool bar:

1. Select the [My Reports](#) tab and select the [My reports](#) subtab.
2. Select the report type. The list of saved reports of this type appears.

**Saved reports**

Select one or more report types

- Item statistical reports
- Invoice list reports
- Invoice summary reports
- Item count reports
- Item list reports
- Item MARC Export
- Item statistical reports
- Patron account count reports
- Patron account list reports
- Patron account statistical reports
- Patron count reports**
- Patron list reports
- Patron statistical reports

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	Patron Counts by Code		10/31/2017	10/31/2017	[REDACTED]	Patron count reports	Delete Edit

3. Select the report you want to publish.
4. Click [Publish report](#). The Basic Publishing page opens.

5. Select [Landscape](#) or [Portrait](#) to specify the report's orientation on the page.
6. Select a [branch](#) for the report in the Branch to publish to box.
7. Select [Personal](#) folder or [Branch](#) folder to indicate the customer folder in which to save the report. The personal folder will be a subfolder under your library's Custom folder labeled with your user name and will only be accessible by you. The branch folder will put the report in your library's Custom folder and will be accessible by other staff at your library.
8. Click [Publish](#) to save the report.

The report will now be available for you to generate from your library's Custom report folder on an as-needed basis (**Polaris Tool Bar / Utilities / Reports and Notices / Custom / My Library**).

**Note:** After a report is published to the Customer folder in Polaris Reports and you edit it in SimplyReports, the changes do not affect the version in the Custom folder. To change the Custom report, you must edit the report in SimplyReports and publish it with the same name so that it overwrites the old one in the Custom folder.

**Note:** Once you have published a report, only SHARE Staff can remove it from your folder.

## Using Data from a Record Set

Sometimes you may want to run a report based on a Record Set that has already been created. In SimplyReports this is easy to do.

After selecting your options from Steps 1-5 listed in [“Steps to Creating a Report”](#), you must then point SimplyReports to the Record Set. This happens in Step 6 when you are adding your filters.

For a Patron Record Set, the option will be listed on Patron General Filters.



– Patron general filters

Patron record set

This screenshot shows a green header bar with the text "– Patron general filters". Below the header, there is a checkbox labeled "Patron record set" followed by a text input field with a dropdown arrow on the right side.

For an Item Record Set, the option will be listed on Item General Filters.



– Item general filters

Item record set

This screenshot shows a green header bar with the text "– Item general filters". Below the header, there is a checkbox labeled "Item record set" followed by a text input field with a dropdown arrow on the right side.

If you need other filters, add them. The filters will only be applied to any patron or item records that you have in the Record Set.

## SimplyReport Tips

- If you select a filter by checking the check box and *do not* select a value by highlighting it, SimplyReports will use *all* the values, e.g., if you check Collection in the Item general filters but do not highlight a specific collection or collections, the report will gather data and show *all* the collections.
- Once selected, some filters also have the option of checking **not present**, e.g., patron expiration date. In this example, checking **not present** limits output to those records where there is no expiration date in the patron record.
- To select more than one value in a menu, hold down the **CTRL** key and click on the values you want. To deselect one value when many are selected, hold down the **CTRL** key and click on the value you want to deselect.
- To select a block of values, click on the value at the top of the list of values you want to select, and then hold down the **SHIFT** key and select the value at the bottom of the list of values you want to select. This will highlight all the values in that range.
- When filtering by date (a specific date range), you must select *from* and *to* dates using the calendar icons.
- For those filters where you are prompted to type specific information, you may truncate with an \* at any point, e.g.:
  - a) Patron block and note filters: Blocking notes - \*needs to sign\*
  - b) Patron user defined fields filters: (User 2) Homeroom/Location - \*Henderson\*
  - c) Item block, note, and funding filters: Physical condition - \*
  - d) Item call number filters: Classification number - 000.\*-099.\*
- If you do not move one or more of the values from the “**Columns selected for output**” list into the “**Columns selected for sort**” list, the report you create will be sorted by the order they appear in the “**Columns selected for output**” list.

- You can safely maximize (+) and minimize (-) the filter lists while creating a report without losing the information you select.

If you create a list report (patron or item) and some fields are blank, that indicates the information asked for is not in the database for those specific patron or item records, e.g., the expiration date may be blank for some patrons, or the item assigned collection name may be blank for some items.