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SHARE STAFF SERVICES TEAM
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SimplyReports

SimplyReports is an Add-on product available from Polaris. SimplyReports allows the user to create custom reports using SQL (System Query Language) without requiring the user to learn SQL.

Users select the Category, i.e. Patron, Patron Account, Holds, Items, Serial Holdings or Bibs. You can select the type of report, i.e.

- List (a list of your report criteria)
- Count (a count only of your report criteria)
- Statistical (this feature is currently not available for any user)

Users then select the columns for display, the sort order of those columns and any filters you choose. Filters 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 be saved for later use by publishing it to your Custom folder.

Logging In and Overview

To log in to SimplyReports, go to: http://ihlsrpts.illinoisheartland.org/SimplyReports

Note: SimplyReports can be run on any browser and from a computer that does not have Polaris on it. You will use your current Polaris login and password.

Enter your Polaris User name and password, then click the [Log in] button.

After logging in, you will see the following window:
The tabs across the top of the window 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.

- **Patrons** – use for information based on data in Patron Registration and Patron Status.
- **Patron Account** – use for information based on data in Patron Status, i.e., 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** – this feature is currently 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 invoice records.
- **Orders** – use for information on acquisition purchase order records.
- **My Reports** – this option allows you to access any saved reports, maintain scheduled (this feature is currently not available) and saved reports, and to view scheduled jobs set up (this feature is currently not available).
- **Admin** – this feature is currently not available for any user except Staff Admin.
- **Help tab** – accesses the SimplyReports online help index.

Each category has the following common options:
- Maximum number of rows to return - the default is 99,999.
- Address type – for those reports that include an address, you can specify the format of the address and how it’s displayed.
- Date criteria – for those reports that include date options, this option lets you select a date range for your report (only available in acquisitions).
- File type – this option allows you to specify the file type your results will export into, either Excel or plain text. If text is selected, you will need to specify the delimiter.
- Filters – this option allows you to apply specific filters to your report. The filters change depending on what information you want to exclude or include, date ranges, informational pieces such as collection code, material type, etc.

Directly beneath the categories are the options for the type of report to run: list, count or statistical.

- 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 – Access is blocked from all statistical reports because of slow downs in Polaris.

The “Report output columns” contain the columns in Polaris related to the category you have selected. This list is in alphabetical order. Highlight an output column and left click on the arrows to add it to the “Columns selected for output” list.

Tip: You can select more than one field to move at a time using the control key.

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 removed from the “Columns selected for output” list. It will appear again in the “Report output columns” list.

Tip: Any column returned to the “Report output columns” will be listed at the bottom of the list – not in alphabetical order.

Highlight a field and left click on the arrow to move the column to the “Columns selected for sort” list. This is how your report will sort. You can have multiple sort options. To remove a sort column, highlight the line and click the button. To change the sort order, highlight the line you want to move and use the up and down arrow buttons to change its placement in the sort.

The include header box is checked by default. This option displays the column headers on your report. If you don’t want the header rows, you can unchecked this box. The Excel File box is checked as a default and allows you to export the report in an Excel format.
Filters change on each window depending on the category, there will be several filters to choose from. Selecting the right filters allows you to limit your report to the correct results.

You can limit by dates and by two types of relative date filters:

- Date filter - used to include dates within a certain period prior to the report run date.
- Relative Date Filter - include dates between a certain number of days, months, or years ago and the report run date.

To access other filters, use the + and – buttons.
Steps to Creating a Report

1. Select the category of the report.

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

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. Add Report Output columns by highlighting the line (multiples are allowed) and clicking the arrow key to move them to the “Columns selected for output” list. This list contains the fields that are selected for the report; you can change the order by using the up and down arrows.

5. 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”. 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 to sort by clicking on ×.

6. Select your filters. You can pick multiple filters for one report. The available filters change depending on what type of report you are running. To see what is under each filter section, click the + sign to expand the list. Clicking – will close a 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 another window.

8. Review the data. If the output is not what you wanted, close the window. If the output is what you wanted, select a method for saving the report. There are 3 ways to save the report:
   a. Download report output. When checking this option, a download button will appear. Click the download button. An Open window will appear
for you to open the file in Excel. Click Open. Excel will launch. You can then save the file in Excel 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**.

d. You can check one, two or all three of these options.

9. Accessing your Reports.

a. If you have downloaded the report, after opening it in Excel, you should access the report on your local hard drive.

b. If you have saved the report, see Step 10 to access it.

c. If you have created a Record Set, go to the main Polaris toolbar for patron record sets, and click **Patron Services / Record Sets**. Find your record set. If you have created an Item Record Set, go to **F12**, change the Object to **Record Sets** and search for the name of the record set.

10. To access a Saved Report, go to the Simply Reports tab, “**My Reports**”. Click into the drop down menu to the type of report that you have created. Reports for that type will appear in a list below. For each report you can:

   a. Delete it

   b. Edit the report (this is not very useful as you cannot change the filters). Also, be aware that the columns revert to an alphabetical order when editing.

   c. Run Reports (this gives you the opportunity to see the report in Excel).

   d. Publish the report.
Steps for Publishing a Report

Under “My Reports” tab, find your report, check the box and click the [Publish Report] button. The following screen appears:

Basic Publishing

You can name your report or change the description differently than when you saved it. Pick the orientation of the report – most work better as “landscape”. You will publish the report to the Custom folder for your library. You can publish to a “personal folder” or a “branch folder”. The personal folder will be a subfolder under your library’s custom folder; it will be labeled with your user name. The branch folder will put the report under your custom folder at the top level.

This report will now be available for any of your staff to run through the Custom report.

Tip: Once you have published a report, only System staff can remove it.
Using Data from a Record Set

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

After selecting your options from Steps 1-5 listed in “Steps to Creating a Report”, you must then point Simply Reports 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 under **Patron General Filters**.

![Patron General Filters]

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

![Item General Filters]

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

Creating a List of Expired Patron Barcodes

Category: Patrons
Sub-Category: Patron list reports
Columns selected for output:
  - Patron Full Name
  - Patron Barcode
  - Patron Code
  - Patron Expiration Date
Columns selected for sort:
  - Patron Expiration Date
Include Header Rows and Excel file

Patron General Filters:
  - Library Quick Pick: My Library
  - Branch: My Library
Patron Date Filters:
  - Expiration Date: Pick a Range of Dates

Creating a List of Patrons that Owe More Than A Certain $$ Amount

Category: Patron Account
Sub-Category: Patron Account List Reports
Columns selected for output:
  - Patron Full Name
  - Patron Barcode
  - MARC Title
  - Item Call Number
  - Item Barcode
  - Acct. Trans. Balance - Outstanding Chgs. Only
  - Acct. Reason (or fee reason)
  - Patron Acct Charges
Columns selected for sort:
  - Patron Full Name

Transaction: Charges
Include Header Rows and Excel file

Patron Account Miscellaneous Filters:
  - Check Charges (amount) Greater than or equal to Enter $$ Amount
Patron Filters:
  - Library Quick Pick: My Library
  - Branch: My Library
Creating a List for Items with Local Holds Only – Record Set Example

Category: Items
Sub-Category: Item list reports
Columns selected for output:
  - MARC Title
  - Item Barcode
  - Item Call Number
  - Item Creation Date
  - Item Shelf Location (optional)
Columns selected for sort:
  - Item Creation Date
Include Header Rows and Excel file

Item General Filters:
  - Library Quick Pick: My Library
  - Branch: My Library
Item Relative Date Filters (Prior to a specified date)
  - Check Creation Date More Than XXX Days before the report run date
Item Checkbox Filters
Check the box for either “Patrons from this branch only checked” or “Patrons from this library and branches checked”. This depends on what your library is using in the item record. You can only have one selected.

Creating a List of What Has Been Newly Added to the Catalog

Category: Items
Sub-Category: Item list reports
Columns selected for output:
  - MARC Author
  - MARC Title
  - Item Call Number
  - Item Assigned Collection Name
  - Item Creation Date
  - Item Shelf Location (optional)
Columns selected for sort:
  - Item Call Number
Include Header Rows and Excel file

Item General Filters:
  - Library Quick Pick: My Library
  - Branch: My Library
Item Relative Date Filters (Between Two Dates)
  - Check Creation Date Between XXX Days ago and the report run date

Recommendation: Use at least 32 days to capture months that have 31 days versus 28 days. Also, would recommend cleaning the list up in Excel by removing Serials information.
Report to Count How Many New Items You Have Added Based on Material Type

Category: Items
Sub-Category: Item Count Reports
Columns selected for output:
  Item Material Type
Include Header Rows and Excel file

Item General Filters:
  Library Quick Pick: My Library
  Branch: My Library
Item Relative Date Filters (between two dates)
  Check Creation Date between XXX Days ago and the report run date

Note: Instead of Material Type this report can be run with Collection Code to get a count of how many items you have in each collection.

Creating a List of Circulation Statistics for a Particular Material Type

Category: Items
Sub-Category: Item list reports
Columns selected for output:
  Item Material Type
  MARC Title
  Item Barcode
  Item Call Number
  Item YTD Circ Count
  Item Lifetime Circ Count
  Item Creation Date
Columns selected for sort:
  Item Creation Date
Include Header Rows and Excel file

Item General Filters:
  Library Quick Pick: My Library
  Branch: My Library
  Material Type: Select the Material Type that you want the report to be run for
Item Date Filters:
  Creation Date – enter range of dates
Creating a List of Item Specific Holds

Category: Holds
Sub-Category: Holds list reports
Columns selected for output:
  - MARC Browse Author
  - MARC Browse Title
  - Item Call Number
  - Item Barcode
  - Patron Full Name
  - Patron Barcode
Columns selected for sort:
  - Item Call Number
Include Header Rows and Excel file

Hold General Filters:
  - Hold Status: Active
  - Check Item specific requests
Hold Relative Date Filters:
  - Check Creation date more than XXX Days before the report run date
Item Filters (only for item specific and fulfilled requests):
  - Assigned Branch: Library Quick Pick and Branch

 Purchase Alert for Items with XXX Holds on Them

Category: Holds
Sub-Category: Holds count reports
Columns selected for output:
  - MARC Browse Title
  - MARC Bibliographic Record ID
Columns selected for sort:
  - MARC Browse Title
Include header rows and Excel file
Optional: Check Number of Requests Greater than XX
Hold general filters:
  - Hold Status check Active
Patron general filters:
  - Patron branch: Library Quick Pick and Branch

Note: For this report to return a count of how many holds only your patrons have on a certain title, you must add the status of Active. Also, adding the bib record ID number gives you a way to search for the title quickly: in the Find Tool, object is bibliographic records; search by Control Number.
Weeding Report for Serials

Category: Serials
Sub-Category: Serials list reports
Columns selected for output:
- MARC Browse Title
- Issue/Part Designation
- Item Barcode
- Item Lifetime Circ Count
- Item Status
- Item YTD Circ Count

Columns selected for sort:
- MARC Browse Title

Include Header Rows and Excel file

Holdings Record General Filters:
- Library Quick Pick: My Library
- Branch: My Library

Issue / Part General Filters:
- Status: Received

Union List of Serials

Category: Serials
Sub-Category: Serials list reports
Columns selected for output:
- MARC Browse Title
- MARC ISSN
- Holdings Record Subscription Status
- Holdings Record Retention Note

Columns selected for sort:
- MARC Browse Title

Include Header Rows and Excel file

Holdings Record General Filters:
- Library Quick Pick: My Library
- Branch: My Library