



# SIMPLY REPORTS

DEVELOPED BY THE  
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:

**POLARIS** LIBRARY SYSTEMS ■ ■ ■ **SimplyReports** [Log out](#)

**Patrons** **Patron Account** **Holds** **Items** **Bibs** **Authorities** **Serials** **Funds** **Invoices** **Orders** **My Reports** **Admin** **Help**

**Patron list reports** **Patron count reports** **Patron statistical reports**

Maximum rows to return: 99999 Address type to use: Notice

Report output columns: Patron acct charges, Patron acct credits, Patron addr check date, Patron alt email address, Patron barcode, Patron birth date, Patron block

Columns selected for output

Columns selected for sort

☒ Include header rows  
☐ Text file  
☒ Excel file  
 Delimiter type: Comma & Quotes

**Submit** **Help**

+ Patron general filters  
 + Patron date filters  
 + Patron relative dates filters  
 + Patron miscellaneous filters  
 + Patron block and note filters  
 + Patron user defined fields filters  
 + Patron ID filters

**Submit**

- 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 uncheck 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.

The screenshot displays a filter configuration interface. It features a list of filter categories on the left, each with a plus (+) or minus (–) button. The categories are: 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. The 'Patron user defined fields filters' category is currently expanded, showing five checkboxes and input fields. Each checkbox is followed by a label and a 'Not present' checkbox. The labels are: (User 1) Driver's License/ID Number, (User 2) Homeroom/Location, (User 3) Parent/Guardian, (User 4) Others, and (User 5) SIP Internet (Yes/No). The 'Patron ID filters' category is also expanded, showing a checkbox and two input fields. The first input field contains the number '5' and the second input field contains the number '939418'.

Filter Category	Filter Name	Value	Not present
Patron user defined fields filters	(User 1) Driver's License/ID Number		<input type="checkbox"/>
	(User 2) Homeroom/Location		<input type="checkbox"/>
	(User 3) Parent/Guardian		<input type="checkbox"/>
	(User 4) Others		<input type="checkbox"/>
	(User 5) SIP Internet (Yes/No)		<input type="checkbox"/>
Patron ID filters	Extract records between patron ID	5	
		939418	


## Steps to Creating a Report

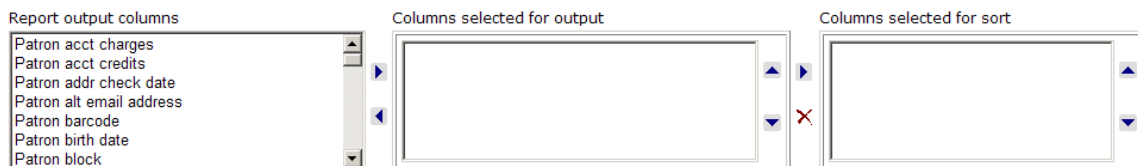
1. Select the category of the report.
2. Select whether the report should be a list report or a count report.
3. Check your default settings such as “include header rows” or “Excel file”.

☒ 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 .



The screenshot shows three panels in a row. The first panel, 'Report output columns', contains a list of fields: Patron acct charges, Patron acct credits, Patron addr check date, Patron alt email address, Patron barcode, Patron birth date, and Patron block. The second panel, 'Columns selected for output', is currently empty. The third panel, 'Columns selected for sort', is also empty. Arrows indicate the flow of selection from the first panel to the second, and from the second to the third. A red 'X' icon is visible between the second and third panels, indicating a delete function.

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:

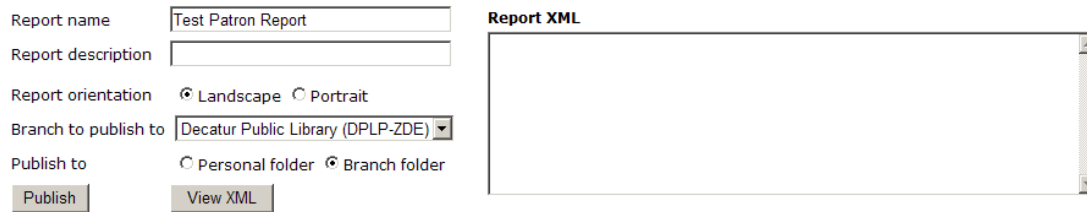
- a. Delete it
- b. Edit the report (this is not very useful as you cannot change the filters). Also, be aware that the columns revert to an alphabetical order when editing.
- c. Run Reports (this gives you the opportunity to see the report in Excel).
- d. Publish the report.



## 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



The screenshot shows a web form titled "Basic Publishing". On the left side, there are several input fields and radio buttons. The "Report name" field contains "Test Patron Report". The "Report description" field is empty. The "Report orientation" section has two radio buttons: "Landscape" (which is selected) and "Portrait". The "Branch to publish to" is a dropdown menu showing "Decatur Public Library (DPLP-ZDE)". The "Publish to" section has two radio buttons: "Personal folder" and "Branch folder" (which is selected). At the bottom left of this section are two buttons: "Publish" and "View XML". To the right of these fields is a large, empty rectangular area labeled "Report XML" at its top left corner.

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.

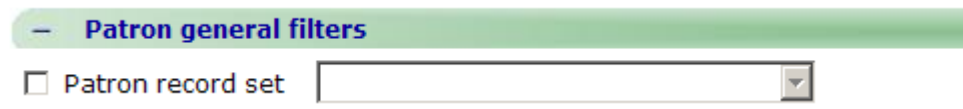
Tip: Once you have published a report, only System staff can remove it.

## 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**.



The screenshot shows a green header bar with a minus sign and the text "Patron general filters". Below this, there is a checkbox labeled "Patron record set" followed by a text input field and a dropdown arrow.

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



The screenshot shows a green header bar with a minus sign and the text "Item general filters". Below this, there is a checkbox labeled "Item record set" followed by a text input field and a dropdown arrow.

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

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### *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.

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### *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.

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*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

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### *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

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### *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