

# Simply Reports

Polaris Reporting Tool

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# Polaris Toolbar Reports

Canned vs. Custom Reports

The screenshot displays the Polaris ILS 4.1R2.1036 software interface. The main window has a menu bar with 'File', 'Acquisitions', 'Serials', 'Cataloging', 'Patron Services', 'Circulation', 'Administration', 'Utilities', 'Window', and 'Help'. The 'Utilities' menu is open, showing options: Reports and Notices, Importing, Exporting, Cataloging Processing, Quick-circ Item Records, Link to Supplier Databases, Update Currency Exchange Rates, Label Manager, Mailing Label Manager, Credit Card Payments Manager, URL Detective, and Web Browser.

The 'Polaris Reports' window is open, showing a tree view of report categories and a table of available reports. The tree view includes: Polaris, Acquisitions, Cataloging, Circulation, Custom, Notices, PAC, Public Services, Serials, and System. The table lists the following reports:

Name	Type	Date Modified
Acquisitions	Folder	11/11/2012 6:08 PM
Cataloging	Folder	05/20/2012 8:15 PM
Circulation	Folder	11/11/2012 6:08 PM
Custom	Folder	07/25/2014 3:22 PM
Notices	Folder	05/20/2012 8:16 PM
PAC	Folder	05/12/2011 11:37 PM
Public Services	Folder	05/12/2011 11:37 PM
Serials	Folder	05/12/2011 11:37 PM
System	Folder	05/12/2011 11:37 PM

# Report creation & organization outside of Polaris

Simply Reports – <https://reports.clcoho.org/simplyreports>

Report Organization – <https://reports.clcoho.org/reports>

The screenshot shows the Polaris SimplyReports web interface. At the top, there is a navigation menu with tabs for Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports, Admin, and Help. Below the menu, there are sub-tabs for Patron list reports, Patron count reports, and Patron statistical reports. The main area is titled "Report output columns" and contains three columns: "Report output columns", "Columns selected for output", and "Columns selected for sort". The "Report output columns" list includes: Patron acct charges, Patron acct credits, Patron addr check date, Patron alt email address, Patron barcode, Patron birth date, and Patron block. There are checkboxes for "Include header rows", "Text file", "Excel file", and a "Delimiter type" dropdown set to "Comma & Quotes". A "Maximum rows to return" field is set to "999999" and an "Address type to use" field is empty. "Submit" and "Help" buttons are at the bottom of the configuration area.

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SimplyReports v. 4.1R2 Build 1036

The screenshot shows the "CLC SQL Server Report Server Home" page. It features a navigation bar with "Delete", "Move", "Report Builder", and "Folder Settings" options. Below the navigation bar is a table with columns "Type", "Name", and "Description". The main content area displays a file explorer view of the "Polaris" folder. The folder structure includes: Acquisitions, Cataloging, Circulation, Custom, Notices, PAC, Public Services, Serials, System, and Polaris. The "Polaris" folder is expanded, showing a sub-table with columns "Type" and "Name". The sub-table lists various report categories and branches, including: -Patron Services, -Profile Reference Tables, -Statistical Reports, -Tech Services, Alexandria, Alexandria Public Library, All, CLC Electronic Library, CML, CML Columbus Main Library, CML Hilliard Branch, CML Operations Center, CML Tech Services, FCOL Main Library, Grandview Heights Public Library, London Public Library, and Marvella Public Library.

# Why Simply Reports - over Polaris Canned or Custom Reports or even Polaris Find Tool

- Manipulation of report format – report structure/inclusion/results
  - While the “Find” Tool in Polaris works well for real-time data feedback, it might not present itself in the your preferred method – i.e. Weeding lists – positive is live link to item data can’t do in SR – except Record Set creation
  - Reports created in SR or even those canned or custom can return results in a better format for use than the Find Tool – sorting columns, etc. by selecting “CSV” Output – still better than “Excel” as you can sort columns/fields regardless of size
- Why I create so many SR reports
  - So staff can pull at own convenience and don’t have to wait on a report to be created upon request
  - By including certain fields, it makes the reports actual pull real-time info and not have to recreate
    - Usually this is just including the field “Last Circ Status Change Date” or “Last Activity Date” keeps data live at time of run
  - I am the sole access to SR for SPL – all staff request through me. Usually, I push out reports to them based on needs I know they have, but they come to me as well – streamlines the process and keeps the server from being bogged down w/people just sucking their time away “testing” SR

## Reasons to use SR

- To publish to the Polaris client – to allow them to pull at their convenience
- To define your columns/data for report display
- To push reports to staff – for scheduled delivery – via CLC SQL Server Report Server
- To create record sets w/in Polaris for bulk changes and referral abilities
  - Example of a report pulled for this reason:
    - Patrons w/null birthdays (empty field at migration) so we can place a note on account via bulk method
    - Educators w/fines

## Types of reports

I create reports that can be run for various people/departments/projects. Some of the ones I have created are for:

- The Director
- The Administrative Assistant – SLO Annual Report
- Collection Development
- Librarian Management @SPL – staff activity on accounts in general – waiving specif
- Materials – weeding/display effectiveness/ytd circ comparisons for spec collections/otf items
- Patrons – offline db/notification options/ed list to email blast/patron purge

## The Director

Many of the reports sought after are in the canned or custom area of Polaris, but I have created a few for use:

- Mostly statistical reports –
  - *patrons who reside in certain zip or w/a specific UDF – we use the school district field;*
  - *value of collection;*
  - *shelf allocation for building projects*



## The Administrative Assistant

Working w/SLO annual reports – Mike Fields designed 1 report to use, but we needed some further info so I created reports such as:

- Total circulation of physical materials to Library users for both locations
- Total Adult/Juv Circulation/ GCL – WAL
- Registered Users – as we don't differentiate w/Patron Codes – I could pull by birthdate, signator – which we denote in Address 1, etc.
- Collection Counts
- ILL reports

## Collection Development

We do not have centralized selection nor have access to Collection HQ at SPL so the staff look to me and Polaris/SR for reports to allow us to build a great collection.

Some reports I have created are:

- Items added w/in last 365 days w/Zero circ
- Items 2yr or older w/1 or less lifetime circs

Also looking at ways to help the CLC CD Committee.

A report I have created for this group is:

- Bibs w 1 or less items and 10 or more holds

## Librarian Management

Sometimes to keep better tabs for training opportunities, we run reports that display staff interactions.

- Fine Waiving
- Patron Registrations Deleted
- OTF (not created but follow thru)
- Notes on Items - public

## Materials

Most of the reports I generate revolve around materials.

Material reports I have created:

- Weeding
- Display effectiveness
- YTD Circ statuses for specified collection comparison
- On-The-Fly Items
- Items “In-Transit” for 30+ days
- Items “Missing” for 30+ days
- SPLWL NF Items Not Holdable

# Juv NF 598-599 Weeding Report

	A	B	C	D	E	F	G	H	I	J
1	ItemBarcode	CallNumber	BrowseTitle	BrowseAuthor	Publicatio	ItemCreationDate	ItemYTDC	ItemLifeti	ItemStatusDate	
2	1948371271	J 598 A66C	Crinkleroot's guide to kn	Arnosky, Jim.	1992	12/23/1993 0:00	5	64	04/01/2014 8:57	
3	1230340976	J 598 A66C	Crinkleroot's 25 birds eve	Arnosky, Jim.	1993	01/22/1998 0:00	0	65	07/19/2014 9:30	
4	1202060537	J 598 B153B	Birds	Bailey, Jill.	1992	12/20/1993 0:00	0	67	07/01/2013 11:15	
5	1213496985	J 598 B476H	Hummingbirds	Biel, Timothy L.	1991	12/14/1995 0:00	3	67	07/01/2014 8:58	
6	1213496936	J 598 B476O	Owls	Biel, Timothy L.	1989	12/14/1995 0:00	0	26	09/15/2012 17:22	
7	1216269637	J 598 B476O	Owls	Biel, Timothy L.	1989	11/21/1994 0:00	2	35	05/20/2014 16:58	
8	1268293451	J 598 B644B	Birds, nests, and eggs	Boring, Mel, 1939-	1996	03/31/2003 0:00	6	80	07/15/2014 14:04	
9	1322011733	J 598 B664O	Olivia's birds : saving the	Bouler, Olivia.	2011	09/08/2011 0:00	0	4	05/14/2012 11:22	
10	1235712302	J 598 B935B	Bird	Burnie, David.	1988	04/29/1998 0:00	1	76	04/28/2014 14:15	
11	1268329339	J 598 B935B	Bird	Burnie, David.	2000	11/06/2002 0:00	3	78	06/17/2014 15:20	
12	1210877310	J 598 C423F	Feathery facts	Chermayeff, Ivan.	1995	07/11/1995 0:00	0	37	12/19/2013 18:10	
13	1295244741	J 598 C452W	What's that bird? : gettin	Choiniere, Joseph.	2005	07/12/2006 0:00	2	36	07/28/2014 17:48	
14	1235714514	J 598 C786B	Birds	Cooper, Jason, 1942-	1997	05/11/1998 0:00	4	76	05/28/2014 8:56	
15	1272093863	J 598 D363B	Birds A to Z	DeGezelle, Terri, 1955-	2000	01/12/2004 0:00	8	71	06/19/2014 9:03	
16	1295109589	J 598 D68B	Birds	Doherty, Gillian.	2001	04/18/2007 0:00	0	23	12/03/2013 18:17	
17	1289496810	J 598 D852B	Birds	Dubois, Philippe J.	2005	09/29/2005 0:00	0	36	07/18/2014 12:39	
18	1294860141	J 598 E12T	Tiger with wings : the gre	Esbensen, Barbara Just	1991	08/10/2009 0:00	1	16	04/30/2014 10:20	
19	1213497421	J 598 E88O	Ostriches, emus, rheas, k	Elwood, Ann.	1990	12/14/1995 0:00	1	24	02/25/2014 16:33	
20	1289605519	J 598 F444C	Cardinals, robins, and oth	Fichter, George S.	1993	01/25/2006 0:00	1	55	07/14/2014 11:32	
21	1205660077	J 598 F829I	It could still be a bird	Fowler, Allan.	1990	11/25/1994 0:00	0	54	01/12/2014 16:14	
22	1201131628	J 598 F829I	It could still be a bird	Fowler, Allan.	1990	12/23/1993 0:00	0	49	03/28/2013 16:36	
23	1242655486	J 598 F929B	Baby birds	Frost, Helen, 1949-	1999	01/18/2000 0:00	5	84	05/27/2014 10:07	
24	1242655353	J 598 F929B	Bird families	Frost, Helen, 1949-	1999	12/17/2008 0:00	1	22	07/19/2014 9:22	
25	1242655346	J 598 F929B	Bird eggs	Frost, Helen, 1949-	1999	01/18/2000 0:00	6	72	07/20/2014 13:45	
26	1265056638	J 598 G794B	Birds	Gray, Samantha.	2002	08/06/2002 0:00	3	72	04/19/2014 11:52	
27	1259058905	J 598 G823B	Birds	Green, Jen.	1998	11/19/2001 0:00	1	26	04/28/2014 14:15	
28	1288381559	J 598 H747W	Why do birds sing?	Holub, Joan.	2004	05/31/2005 0:00	0	22	01/27/2014 18:54	
29	1218143798	J 598 J633S	Simon & Schuster Childre	Johnson, Jinny, 1949-	1996	07/23/1996 0:00	0	69	07/16/2013 16:44	
30	1280533009	J 598 K126L	The life cycle of a bird	Kalman, Bobbie.	2002	01/04/2005 0:00	4	34	03/22/2014 13:43	

## Patrons

Patron reports that I have created:

- Offline database
- Patron notification preferences
- List of Educators w/email address to do email blast
- Patron purge research
- Patron entry correctness – report of all Juv cards – Full Access but narrow by bday and street 1
- Movie license – SPL patrons active w/in the last 12 mos
- Patrons w/”Lost” Items – need due to purge set up for our consortium

# Patrons with “Lost” Items

	A	B	C	D	E	F	G	H	I	J	K
1	PatronBarcode	PatronFullName	LastActivityDate	LostItemCount							
2	2241354881	MORRISON, MISTY D	08/23/2013 15:36	57							
3	2235928476	BAILEY, DESARAE N	08/19/2013 15:19	28							
4	2233149984	HUGHES, JONATHAN	09/25/2013 19:25	19							
5	2235921927	MADL, ERICA L	07/11/2013 16:26	17							
6	2235951437	SERGEANT, ALEXIS MICHELLE	07/25/2013 12:21	17							
7	2235947765	OSBORNE, KYLE J	08/22/2013 18:07	16							
8	2235864507	MILLER, AMANDA L	10/13/2013 21:26	16							
9	2235933880	Bowers, Mary Jane	08/22/2013 20:26	15							
10	2240600359	GARRETT, SCOTT L	06/22/2013 17:22	14							
11	2235127483	PACKER, BETH A	06/28/2013 7:01	14							
12	2242868541	SEXTON, KRISTINA	08/06/2013 12:36	14							
13	2235845936	MOSLEY, ALYDIA K	08/19/2013 11:13	14							
14	2230369858	DAWSON, CHRISTOPHER R	08/22/2013 15:31	14							
15	2235941578	KRAFTHEFER, LINDSAY	10/04/2013 12:20	14							
16	2240699658	COMPTON, ANNA E	06/27/2013 18:19	12							
17	2235965718	EVANS, LA RON B	09/10/2013 9:59	11							
18	2235923147	TAYLOR, SHANIKA V	09/10/2013 12:40	11							
19	2242555528	JORDAN, KATHERINE A	10/01/2013 20:34	11							
20	2235936966	KEMP, HEIDI R	10/07/2013 16:18	11							
21	2235933492	TURNER, OLIVIA D	07/01/2013 16:44	10							
22	2235932692	STAMPERD, CHRISTOPHER J	07/16/2013 19:22	10							
23	2235950702	STEARNS, LAURA LEE	08/05/2013 15:04	10							
24	2235936511	WARD, DONALD EVERETT	08/15/2013 18:59	10							
25	2235822208	IVANCIC, ELIZABETH J	08/20/2013 14:44	10							
26	2235950421	RIGGS, RACHEL MARIE	09/11/2013 15:52	10							
27	2235973423	SMITH, JAMIE RAY	10/17/2013 17:38	10							
28	2235968001	SNOUFFER, ANTHONY WAYNE	10/21/2013 18:49	10							
29	2235972961	DIEWALD, TIFFANY HELEN	10/24/2013 17:03	10							
30	2241396411	MOHAMED, MARYAN A	07/16/2013 13:25	9							
31	2235934789	HUGHES, CHRISTINA NICOLE	07/16/2013 18:54	9							
32	2235939036	RUCK, GWENDOLYN M	08/05/2013 11:31	9							

## How to Publish to Polaris Client

- Naming convention – be aware of certain characters – even though it lets you use them in the name, it will not publish correctly to Polaris
- Handout
- *Most likely you will need to submit a ticket to tweak permissions to publish and to resort if you utilize the CLC SQL Server Report Server to organize your published reports*



## Scheduled Reports

- While this sounds like a decent way to use SR, I have no real experience w/scheduling reports. I designed one to run monthly, but to access it, whomever is interested in it (I believe) has to go in through SR to do so.
- There is, however, an option if you login to <https://reports.clcoho.org/reports> , go to your custom folder, find the report you want, click it and then click “Subscribe”. This allows you to send reports to specific emails with timelines, etc. defined. This is nice so that staff don’t have to go looking all over for a certain report that they may need on a consistent basis – ie Missing Report.

## History Reports

- These are only available in Patrons and Item areas of SR
- *Cool because they show the entirety of a history of chosen w/great detail.*
- *History can only extend 95 days*
- *Pulling history on a patron – at least an active patron – can be time consuming so beware*

## Statistical Reports

- Good way to get some quick numbers on the pre-defined subjects listed.
- Savable but difficult to get to work as a run later, not publishable and if you run during operating hours, you are warned that it could affect system performance

## SR Helpful Hints

- Adding “Last Circ Status Date Change” or “Last Activity Date” keeps info in real-time
- CSV Export – allows sort for columns regardless of size differentiation (as opposed to Excel)
- Primary/Secondary Sort in SR prior to saving/publishing
- Stat report running during library operating hours – schedule large reports to run during off-time
- Editing a saved report does not work – you can only edit output sort but nothing else
- Use CLC as a resource when attempting to run new reports – Mike F helped me to create a report that we use called: “SPL Last Copy on Request” – he’s a super resource
- “History” reports are supposed to be enabled, but CLC has a ticket open w/Polaris to see why these are not available to us currently