Polaris Reporting

Canned Reports in the Polaris Client

FLLS has created several "canned" reports over the years that can be very useful. To save time, make sure you check out what there is offered before creating your own report. In Polaris, go to **Utilities → Reports and Notices**. You will see a list of folders along the left hand side. Click on the folders to reveal their contents and click on the plus signs to expand the folders. Double click on the report you would like to run and enter the required parameters, like dates and assigned branch. Be patient, depending on the report, it may take some time to come up on the screen.

Here are some useful reports:

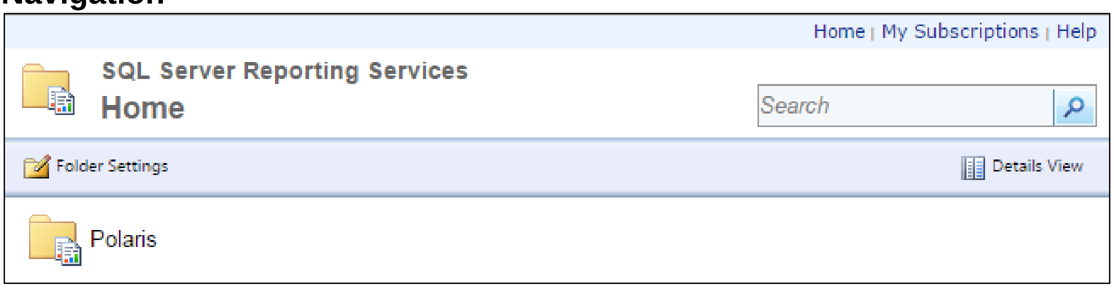
- **Circulation →** Several helpful reports are available like "Item Circulation by Collection."
- **Custom → Cataloging → Item →** "AA Weeding Shelf List **X** Year" in 1, 3, 5, and 10 year increments.
- *More recommendations in the "Polaris Collection Development Reports" document. See also "Polaris Canned Reports Sitemap."*

Web Reporting

Logging In

You can log into the web reporting portal to view canned reports available in Polaris remotely from your Internet browser. Visit http://catalog.flls.org/reports. A window will pop up requiring authentication. Log in with the user name and password for a Polaris workstation, not your unique user id and password. If you are unsure of the user name and password, FLLS has them on file.

Navigation

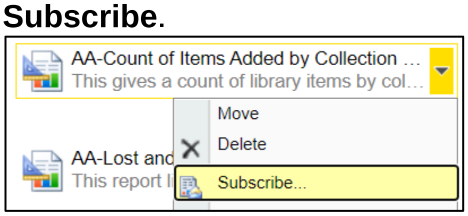


Click on Polaris folder to expand the folders available. Click on each subsequent folder to expand your selections. If you click on the yellow arrow, take care not to move or delete any of the folders or contents. The default settings for the portal should not be changed. You can also search for a specific report using the search field.

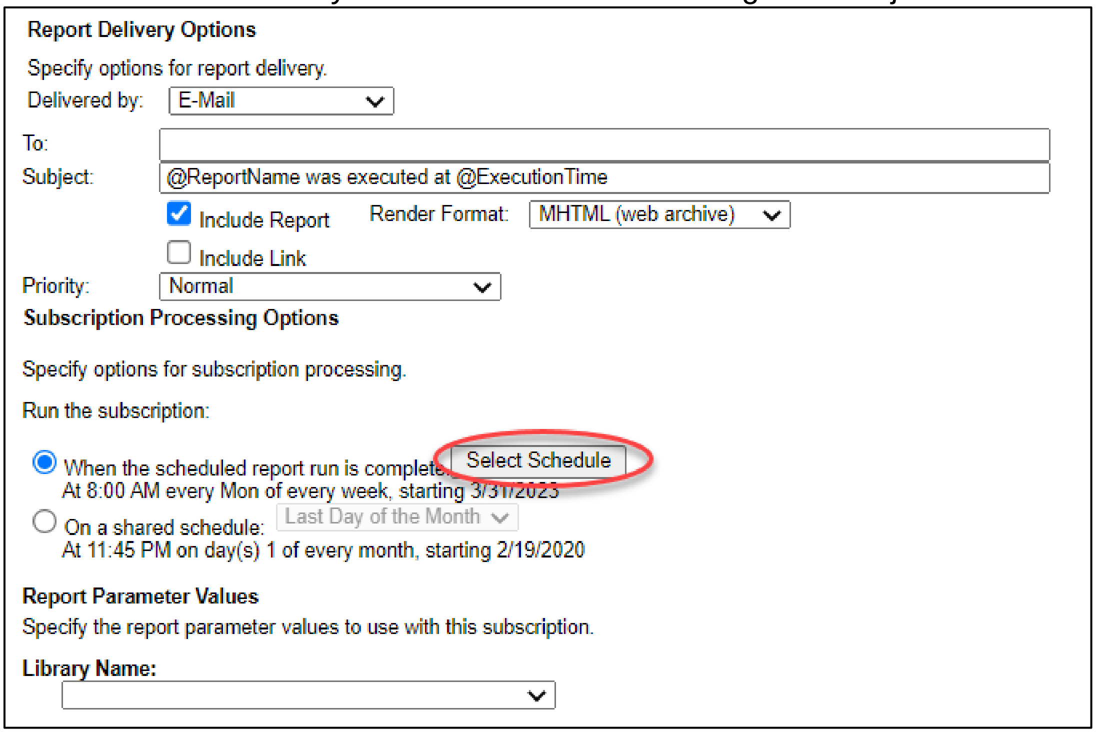
Receiving Reports via Email

To subscribe to various reports and receive emails, click on **Polaris** and then on the subsequent folders until you find the report you would like to have emailed to you. You will also have to select a schedule for when the reports are sent to you.

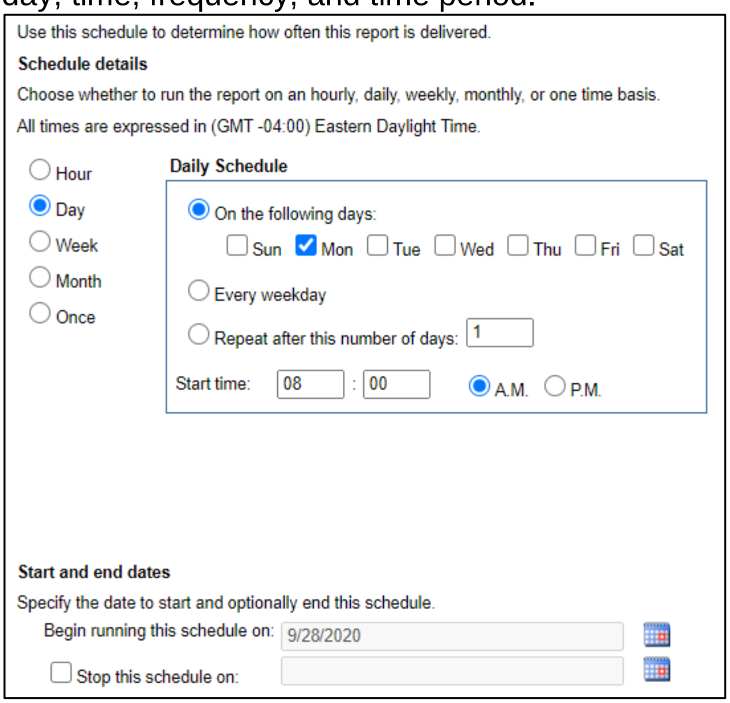
1. Move your mouse to the report and click on the yellow arrow next to the report. Then, click on **Subscribe**.



2. A form will pop up that you can fill out. You can remove the check from “Include Link” as it does not work. Include your email address and change the subject if needed.



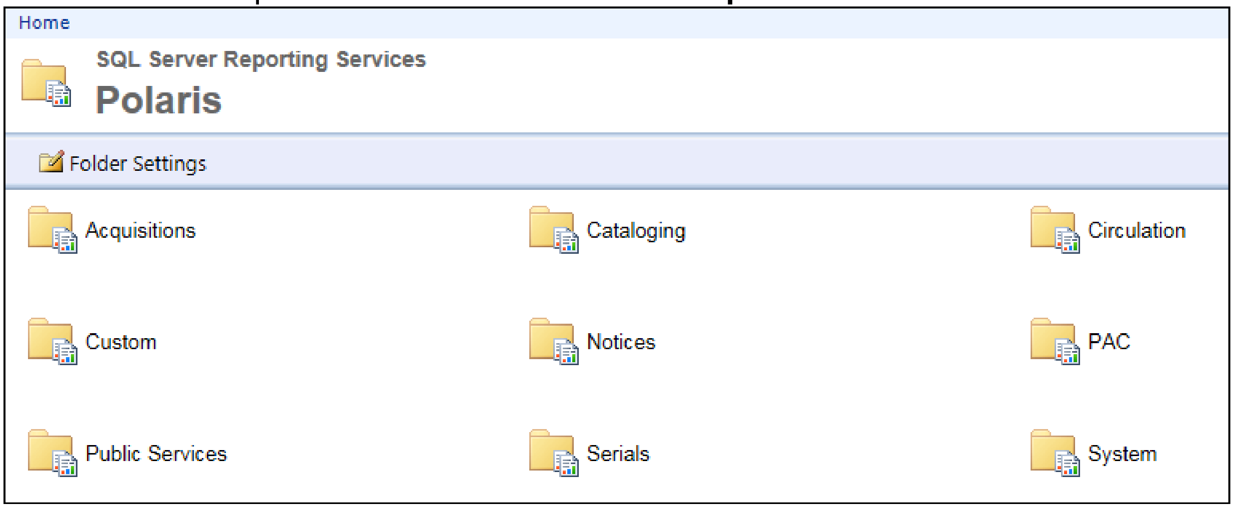
3. Click on **Select Schedule** to choose when the report will be run and emailed to you. Pick the day, time, frequency, and time period.



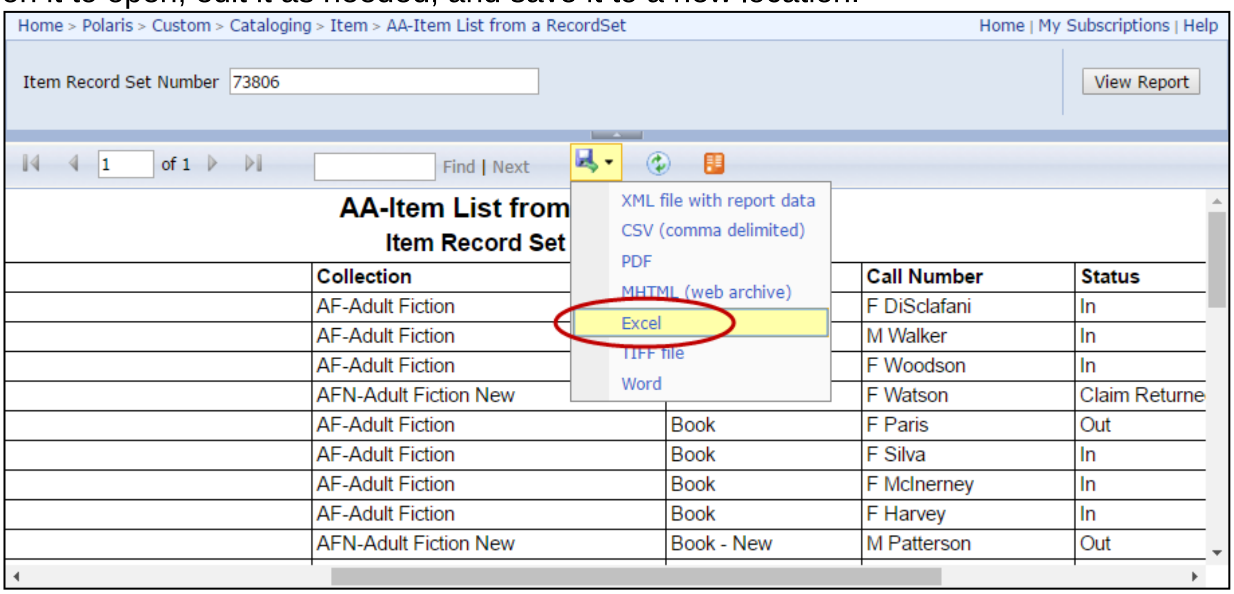
4. Click **OK** when done. This will return you back to the original form. Click **OK** again and your reports will be emailed via the schedule you set up.
5. Click on **My Subscriptions** in the top right hand corner to manage any subscriptions you have!

Sending a Record Set to Excel Using Web Reporting

1. Login to Web Reporting.
2. Locate your specific report. Use the report located here: **Custom → Cataloging → Item → AA-Item List from Record Set**.
3. Enter the desired parameters and click on **View Report**.



4. Click on the floppy disk icon and choose **Excel**. The spreadsheet will download. You can click on it to open, edit it as needed, and save it to a new location.



Logging Out

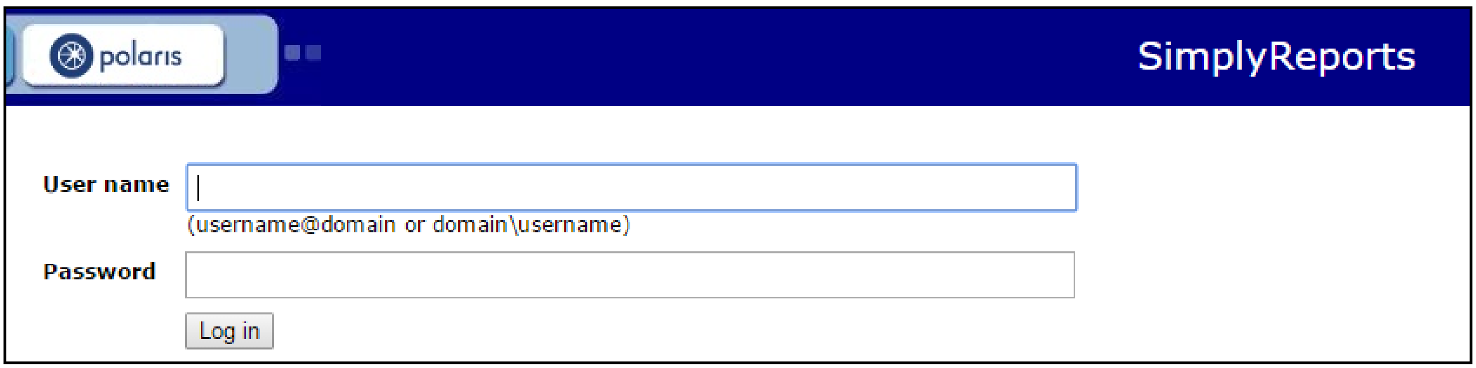
There is no “log out” or “sign out” button. Please just exit your browser.

SimplyReports Overview

SimplyReports is an Add-on product available from Polaris. The program allows the user to create custom reports using SQL (System Query Language) without requiring the user to learn SQL. It allows you to custom design a report based on criteria YOU select. If a canned report in Polaris does NOT do everything you wish it would or does NOT display the information in the order you would like it to be in, or is missing information that you feel is relevant, you can design a report that has all those missing aspects.

SimplyReports works best when you know exactly what data you are trying to compile. Use the attached template to gather your thoughts before accessing the program.

Logging into SimplyReports requires a user name and password, very similar to accessing Report Manager and Polaris. If you are unsure of your user name and password, FLLS has them on file. To access SimplyReports, go to https://catalog.flls.org/simplyreports. Remember to include the FLLS domain.



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

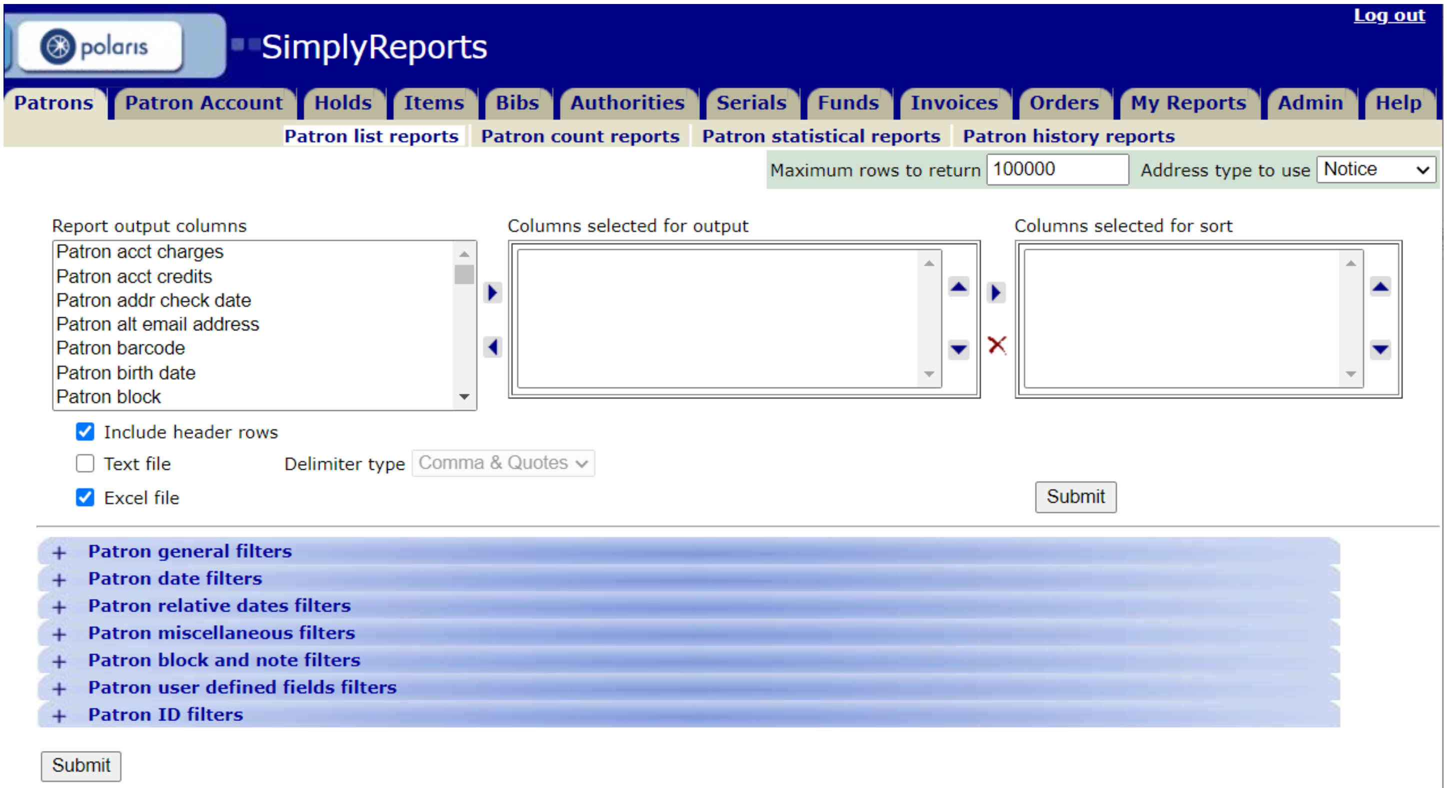
- List (a list of your report criteria)
- Count (a count only of your report criteria)
- Statistical (based on the transaction database and containing statistical information such as checkouts, check ins, etc.)

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, library, statistical codes, circulation status, item codes, call number ranges, etc.

Once the report is submitted, you have several options:

- You can view and print the report
- You can download the report into Excel
- A Record Set can be created from your results
- The report can be saved for later use
- You can save the search parameters

Tabs and Options



The tabs across the top allow you to select the category.

- *Patron* – use for Patron information
- *Patron Account* – use for patron financial information
- *Holds* – use for information on hold requests
- *Items* – use for information on item records
- *Bibs* – use for information on Bib records
- *Authorities* – use for information on authority records
- *Serials* – use for information on serials
- *Funds* – use for information on Acquisition fund records
- *Invoices* – use for information on Acquisition invoices
- *Orders* – use for information on Acquisition orders
- *My Reports* – this option allows you to access any saved reports, maintain scheduled and saved reports, and to view scheduled jobs set up.
- *Admin tab* – use to set up specific parameters in Simply Reports.
- *Help tab* – accesses the Simply Reports online help index.

Each tab has the following common options;

- *Maximum number of rows to return* - the default is 100,000.
- *Address type* – for those reports that include an address, you can specify the format of the address and how it's displayed.
- *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.

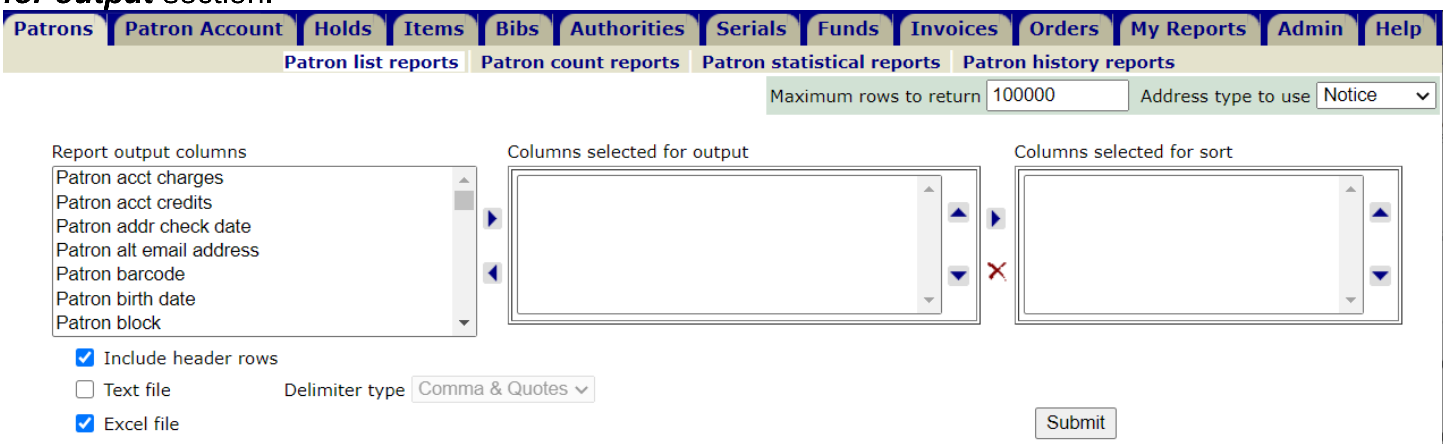
Directly beneath the tabs are the options for the type of report to run; list, count or statistical.

- *List* – this type of report will list detailed information according to the fields you have chosen to display.
- *Count* – this type of report will only display counts for the fields you have selected.
- *Statistical* – there are special considerations when running statistical reports because they not only gather static data, such as a patron's address, but they also report transactions, such as circulation transactions. Running reports that gather data on these transactions can slow down performance if the report is run when the library is open.

  Note: With List or Count reports, you will select the same type of data, limits, and filters.

Report Creation Basics

The ***Report output columns*** section contains the tables in Polaris related to the category you have selected. Highlight an output column and left click on the arrows to add it to the ***Columns selected for output*** section.



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.

Click on the arrow to move the column to the ***Columns selected for sort*** section. This is how your report will sort.

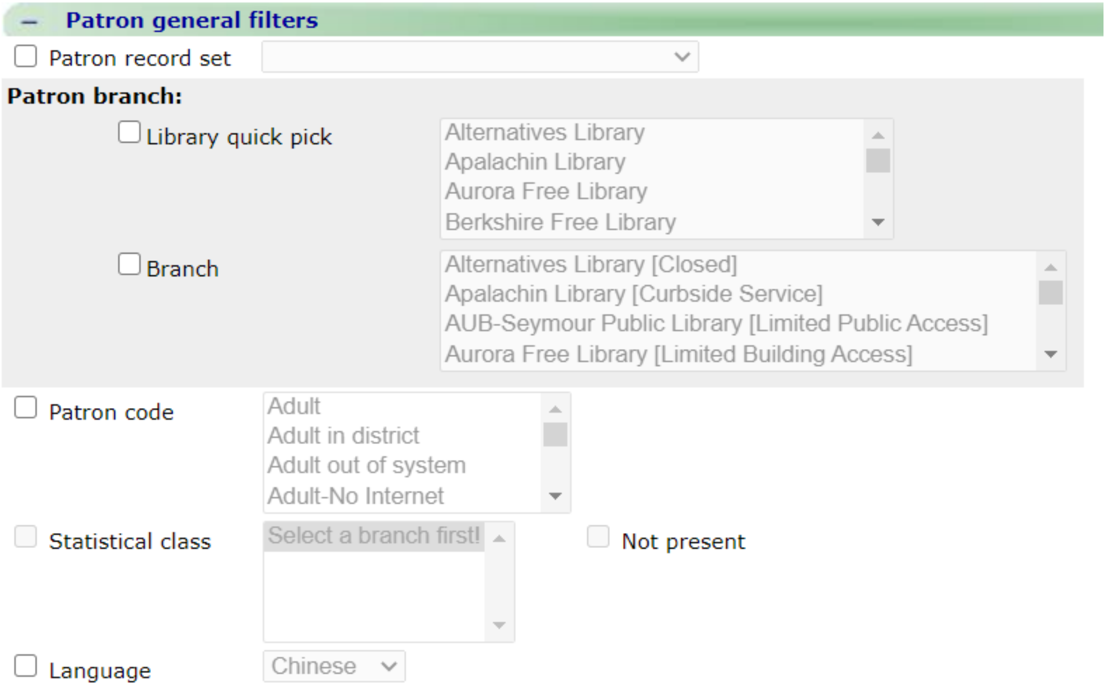
The "Include header rows" box is checked by default. This option displays the column headers on your report.

The "Excel File" box is checked as a default and allows you to export the report in an Excel format.

Depending on the category, there will be several filters to choose from. In the example below, after selecting the Patron tab, left clicking on the plus sign next to the filter category opens up the options available. Placing a checkmark in the box next to the option allows you to select from a drop down list specific filters to apply. "Null values only" means that you want results on fields that contain no data at all and are empty. Holding down the control key and left clicking on a choice allows you to select multiple branches, patron codes, etc.

Filters

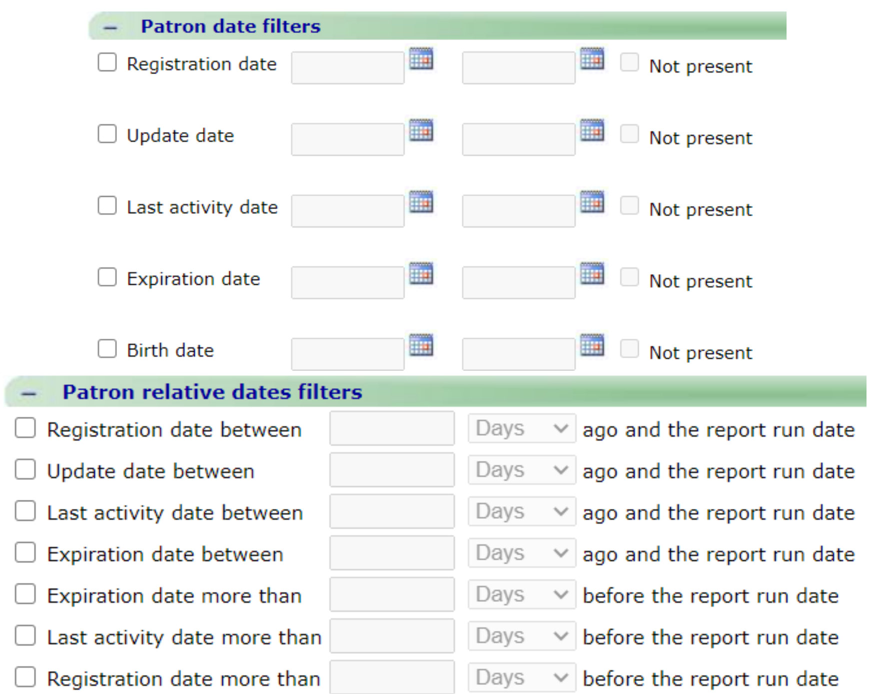
Each set of filters contain different options. The first section includes general filters like branch, code, language, type of item, etc.



Date Filters

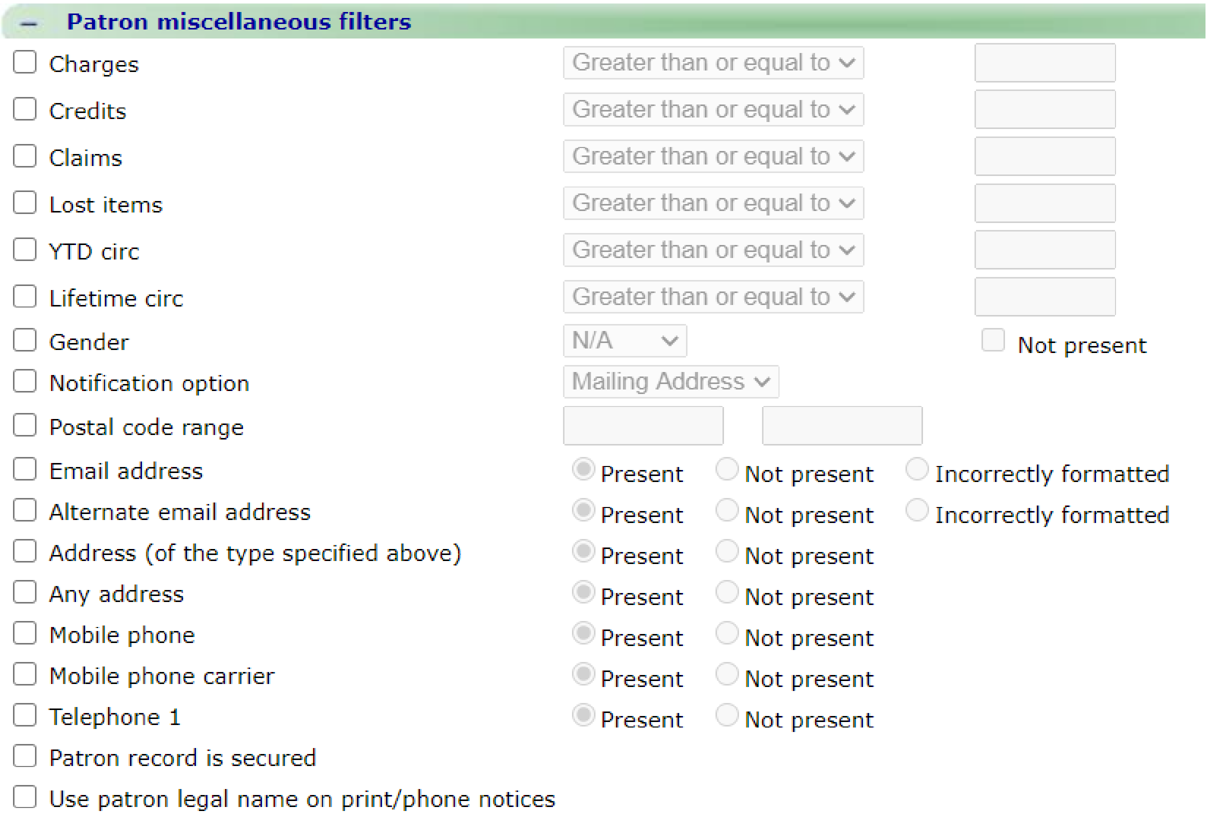
You can limit by dates and by two types of relative date filters.

- *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. For example, Patron registrations that occurred within the last six months up to and including the report run date.

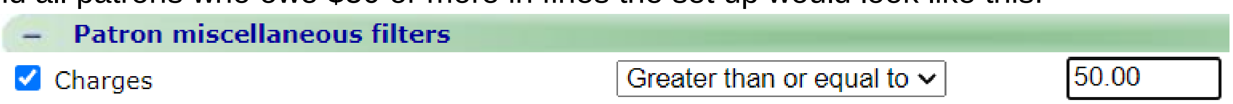


Miscellaneous Filters

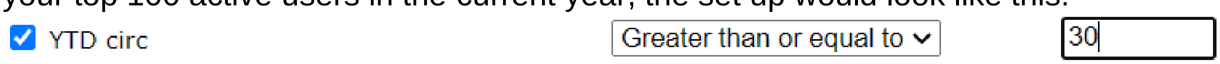
Placing a checkmark in the box next to an option activates the drop down menu. For example placing a checkmark for the Charges option allows to select an amount that is Greater than or equal to or Less than or equal to.



So to find all patrons who owe $50 or more in fines the set up would look like this:



To find your top 100 active users in the current year, the set up would look like this:



If your results are less or more that 100, simply raise or lower the YTD count until your results return 100 patrons.

User Defined Fields

Selecting user defined fields allows you to search for patrons who have data in those fields. If you are unsure of the wordage used you can use an asterisk as part of the criteria.

Let say you want to find all the patrons that have Stephen King Book Club in the local use field but you can't remember if you used S King or King, S. Use the asterisk as a wild card, it would look like this:

This looks for any occurrence of the letter "S" anywhere in the text string.

If you know the wordage started with an S, use this format.

Commonly Created Report Examples

1.) List of Patrons in a specific stat class including email addresses for a targeted mailing. Select the Patron tab.

Columns to Select	Columns to sort by	Filters
Patron first name	Patron last name	Branch
Patron last name		Patron code
Patron street one		Statistical Class if desired
Patron street two		
Patron city		
Patron state		
Patron postal code		
Patron telephone 1		
Patron email address		

2.) Most frequent users with a specific time period. Select the Patron tab.

Columns to Select	Columns to sort by	Filters
Patron first name	Patron previous year circ count	Branch
Patron last name	Patron YTD circ count	Patron Code
Patron street one		Statistical Class if desired
Patron street two		
Patron city		
Patron state		
Patron postal code		
Patron email address		
Patron previous year circ count		
Patron YTD circ count		

You can reverse the order in the **Columns to sort by** to retrieve different results.

3.) Patrons who have email notification checked but do not have an email address in their account. This list should retrieve zero results. Select the Patron tab.

Columns to Select	Columns to sort by	Filters
Patron barcode	Patron full name	Branch
Patron full name		Notification option = email address
Patron code		Email address = Not Present
Patron email address		

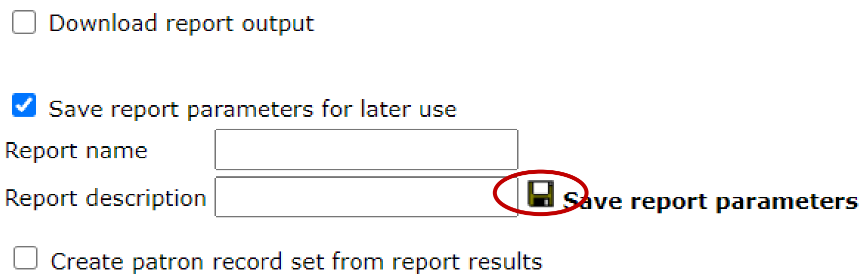
4.) List of item specific holds. Item specific holds are not recommended and can be remedied in Polaris by creating a Bibliographic hold and deleting the item specific hold. Sometimes, it cannot be helped. Select the Holds tab.

Columns to select	Columns to sort by	Filters
MARC browse author	Item call number	Assigned Branch
MARC browse title		Hold Status → Active
Item call number		Check "Item specific requests"
Item barcode		Hold relative date filters → Creation between x days and the report date
Patron full name		
Patron barcode		

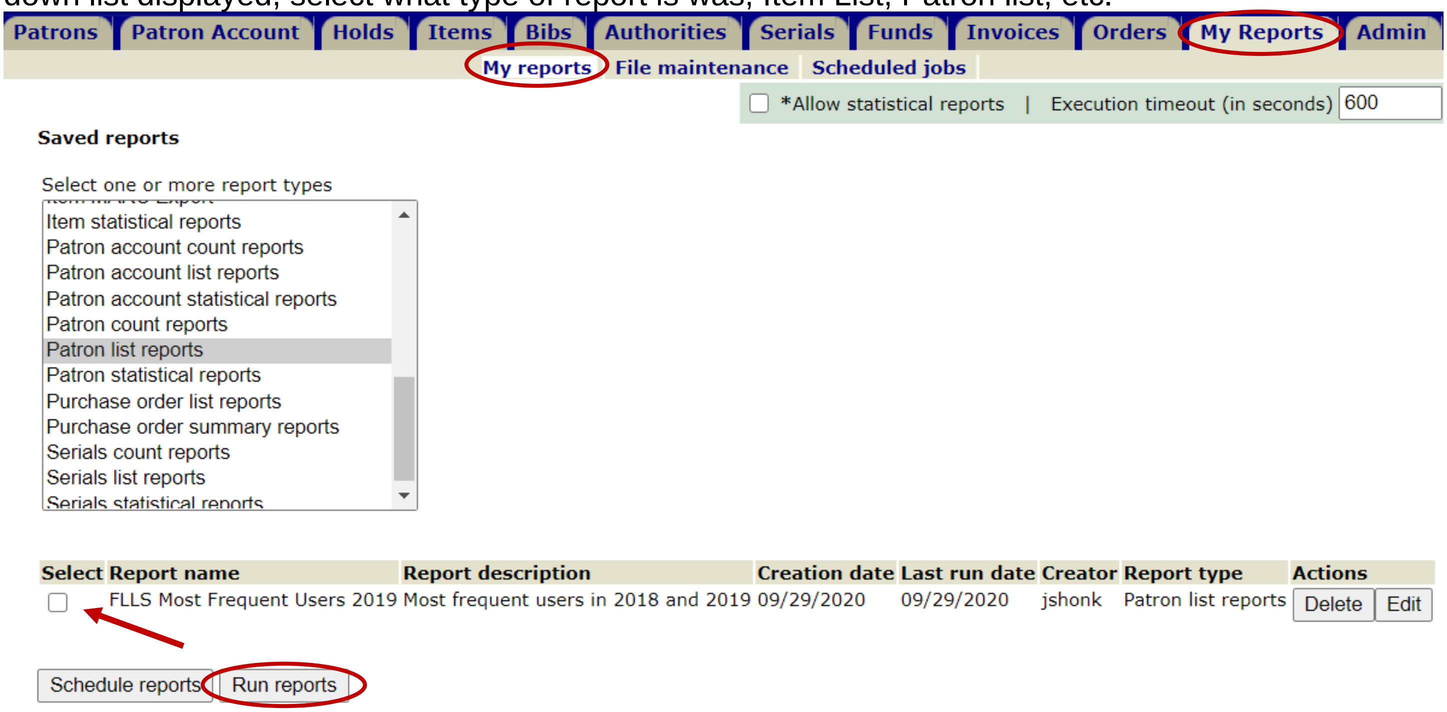
Saving a Report for Later Use

If the report you designed is one you will frequently be using, you can save the report parameters for future use.

- Once you have designed the report, click the **Submit** button.
- In the Preview window you will see an option to **Save report parameters**
- Check the box, fill in a report name and description if desired and click on the **Save** icon



You can access these saved reports from: **My Reports** tab → **My reports** sub tab. From the drop down list displayed, select what type of report is was, Item List, Patron list, etc.



Select the report you want to run by checking the box and then click on **Run Report** located at the bottom of the page.

Editing Saved Reports

Some limitations exist when editing a saved report in Simply Reports.
Editing a saved report is very limited. You can change the fields displayed but that's about it. You cannot change the date range or any filters applied. You cannot specify different filters for the report. Not always automatic. Follow these steps to edit a saved report.

1. Select the type of report you want to edit in the **Select one or more report types** box. The reports of this type are listed.

2. Select a report in the list of saved reports.
3. Click **Edit**. The report options that you can change appear in a window.
4. You can:
    - Change the branch
    - Type a new name for the report in the Report name box
    - Type a new description for the report in the Report description box
    - Add/Remove more data columns to the report
    - Add/Remove columns to be sorted
    - Change the setting for header rows on the report.
    - Change the report output file type
    - Change any other options applicable to the type of report
5. Click **Save** to save the report with the same name, or click **Save as** and rename the report.

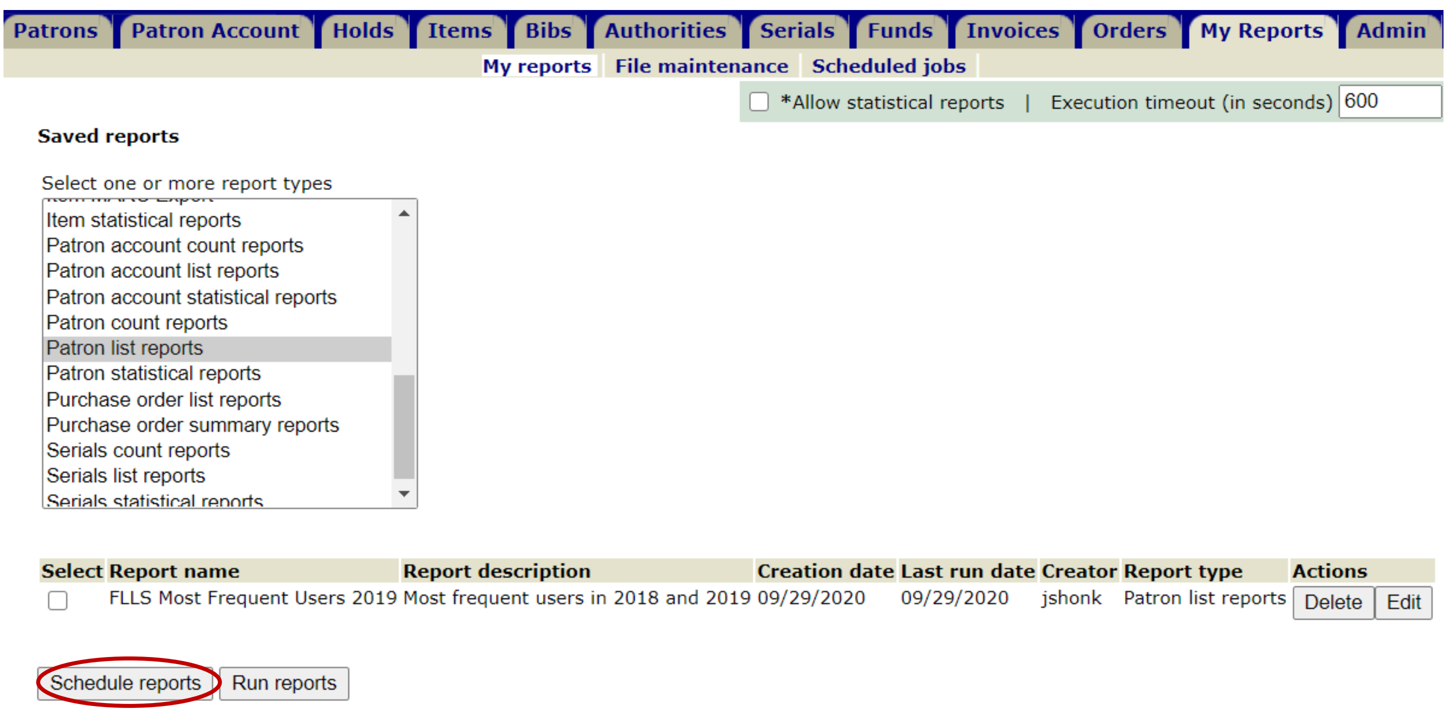
Deleting Saved Reports

You can delete any report you have created. Follow these steps to delete a saved report.

1. Select a saved report.
2. Click **Delete**. A message box appears asking if you are sure you want to delete the report.
3. Click **OK**. The report is deleted.

Scheduling Automatic Reports

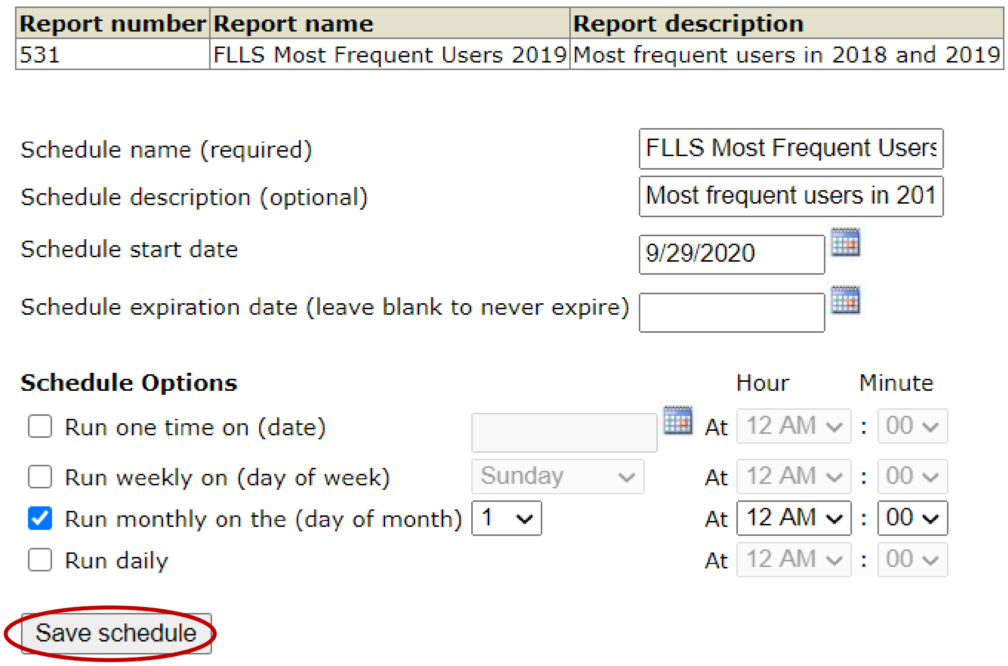
1. Click on the **My Reports** Tab.
2. From the drop down list, select the report type.
3. A list of saved reports is displayed. Place a checkmark in the box next to the report you want to schedule.
4. Click on the **Schedule reports** button.



The Schedule jobs form will display.

- Enter a name
- Enter a description

- Enter a start date
- Enter an expiration date (Optional). The end date is optional. If you do not specify an end date, the schedule continues to run.
- Select a run time
- Click on **Save schedule**



Viewing Scheduled Reports

- The scheduled report will be available after the date and time you selected. Go to the **My Reports** tab → **File maintenance**.
- The reports that have been run will be listed there.
- Double click on the report name to open it. Displayed is the file name, the date it was created and the file size.
- Once you have looked at the file, printed it, etc. place a checkmark next to the file and select Delete. Otherwise all completed reports will be purged within 30 days.

Editing Scheduled Reports

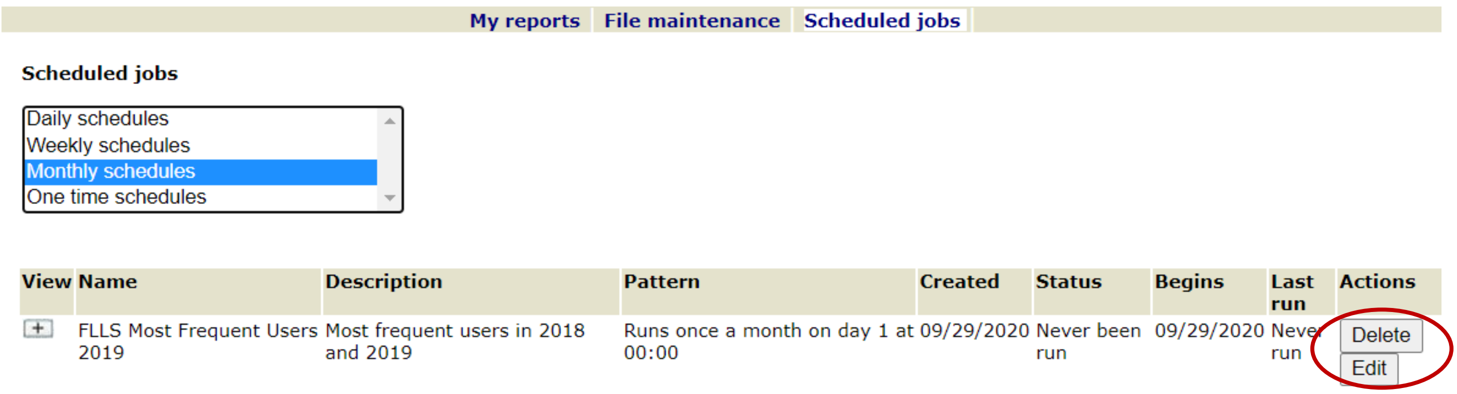
You can edit a scheduled job to add more reports to the schedule, remove reports from the schedule, change the schedule name, change the schedule start or end dates, or change schedule options. Follow these steps to edit a scheduled job.

1. Select the type of scheduled job from the **Scheduled jobs** list. (Daily, Weekly, Monthly, etc.)

2. Select the scheduled job that you want to edit.
3. Click **Edit**. A message box appears asking if you want to edit the job.
4. Click **OK**. The Edit scheduled job window appears.
5. You can:
    - Change the schedule's name and description
    - Change the schedule's start date
    - Change the schedule's expiration date
    - Change when the schedule is run
6. When you are finished setting up a schedule, click **Save schedule**.
7. When you have specified the schedule for the reports, it is available under the **File maintenance** sub-tab.

Deleting Scheduled Reports

1. Select the type of scheduled job from the **Scheduled jobs** list. (Daily, Weekly, Monthly, etc.)
2. Select the scheduled job that you want to delete.
3. Click **Delete**. A message box appears asking if you want to delete the job. Click **OK.**



Don't forget to log out when you have completed your session!

Questions? Comments? **Contact:**

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