

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:

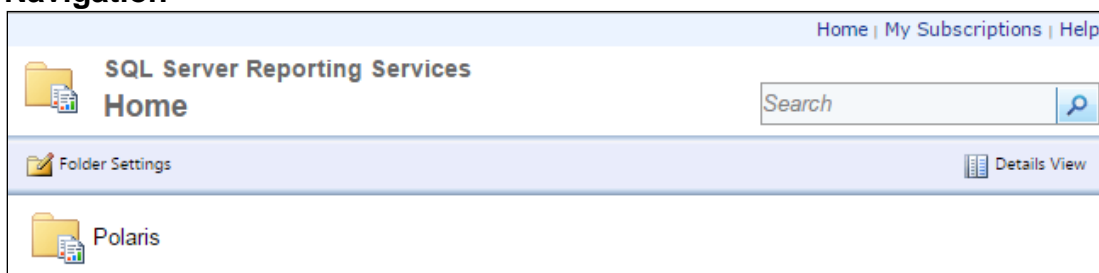
- **Circulation** → Several helpful reports are available like “Item Circulation by Collection.”
- **Custom → Cataloging → Item** → “AA Weeding Shelf List X Year” in 1, 3, 5, and 10 year increments.
- *More recommendations in the “Polaris Collection Development Reports” document. See also “Polaris Canned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

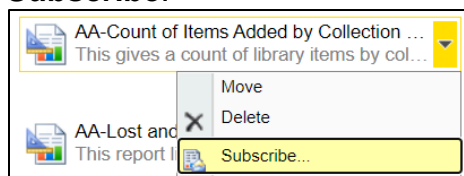


Click on Polaris folder to expand the folders available. Click on each subsequent folder to expand your selections. If you click on the yellow arrow, take care not to move or delete any of the folders or contents. The default settings for the portal should not be changed. You can also search for a specific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

Report Delivery Options
Specify options for report delivery.

Delivered by:

To:

Subject:

Include Report Render Format:

Include Link

Priority:

Subscription Processing Options
Specify options for subscription processing.

Run the subscription:

When the scheduled report run is complete. **Select Schedule**
At 8:00 AM every Mon of every week, starting 3/31/2023

On a shared schedule:
At 11:45 PM on day(s) 1 of every month, starting 2/19/2020

Report Parameter Values
Specify the report parameter values to use with this subscription.

Library Name:

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.

Use this schedule to determine how often this report is delivered.

Schedule details
Choose whether to run the report on an hourly, daily, weekly, monthly, or one time basis.
All times are expressed in (GMT -04:00) Eastern Daylight Time.

Hour
 Day
 Week
 Month
 Once

Daily Schedule


On the following days:
 Sun Mon Tue Wed Thu Fri Sat


Every weekday

Repeat after this number of days:

Start time: : A.M. P.M.

Start and end dates
Specify the date to start and optionally end this schedule.

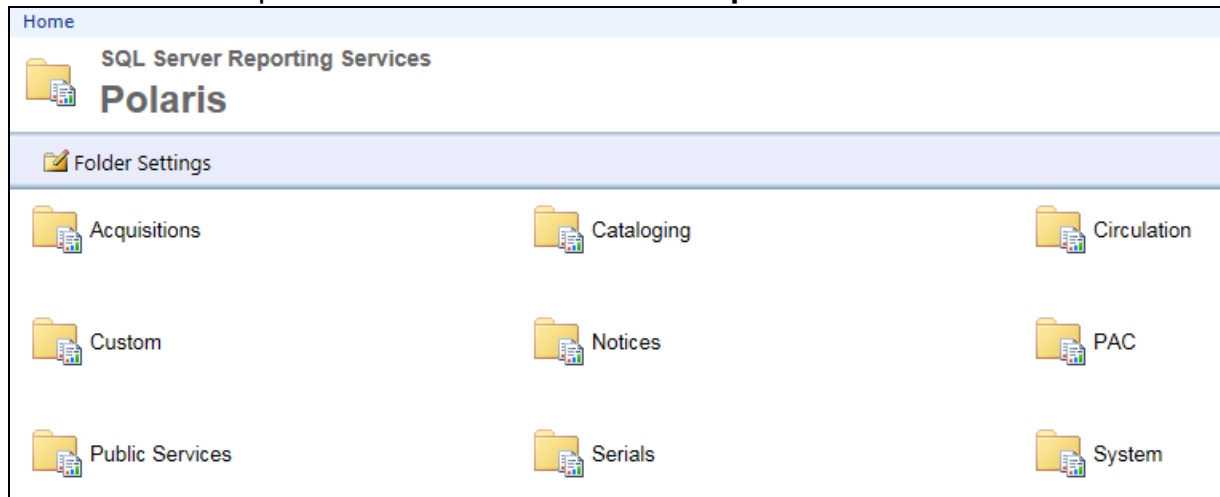
Begin running this schedule on: 

Stop this schedule on: 

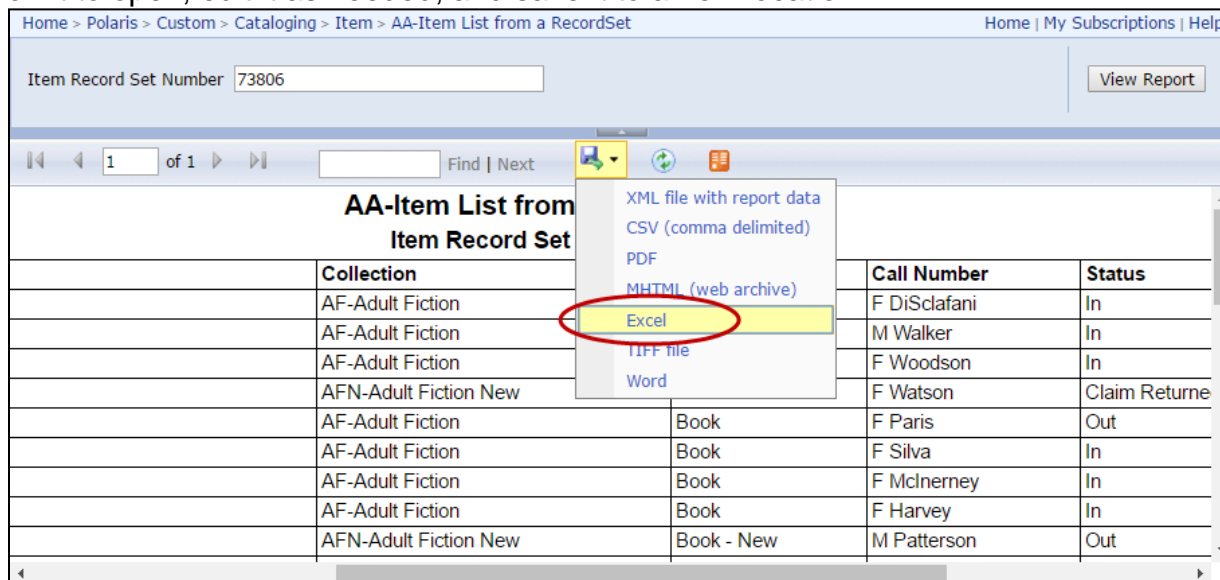
4. Click **OK** when done. This will return you back to the original form. Click **OK** again and your reports will be emailed via the schedule you set up.
5. Click on **My Subscriptions** in the top right hand corner to manage any subscriptions you have!

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.



The screenshot shows the login page for SimplyReports. At the top left is the Polaris logo, and at the top right is the text 'SimplyReports'. The main area contains a login form with the following elements:

- User name**: A text input field with a placeholder '(username@domain or domain\username)'. Below the field is a small icon of a cursor.
- Password**: A text input field with a small icon of a cursor.
- Log in**: A button located below the password field.

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 screenshot shows the 'SimplyReports' interface. At the top right is a 'Log out' link. Below it is a navigation bar with tabs: Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports, Admin, and Help. Underneath these are sub-tabs: Patron list reports, Patron count reports, Patron statistical reports, and Patron history reports. A form area contains: 'Maximum rows to return' (100000), 'Address type to use' (Notice), 'Report output columns' (a list of fields like Patron acct charges, Patron acct credits, etc.), 'Columns selected for output' (an empty list), and 'Columns selected for sort' (an empty list). There are checkboxes for 'Include header rows', 'Text file', and 'Excel file', and a 'Delimiter type' dropdown set to 'Comma & Quotes'. A 'Submit' button is present. Below this 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. A final 'Submit' button is at the bottom left.

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.

Patron general filters

Patron record set

Patron branch:

Library quick pick
Apalachin Library
Aurora Free Library
Berkshire Free Library

Branch
Apalachin Library [Curbside Service]
AUB-Seymour Public Library [Limited Public Access]
Aurora Free Library [Limited Building Access]

Patron code
Adult in district
Adult out of system
Adult-No Internet

Statistical class Not present

Language

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.

Patron date filters

Registration date Not present

Update date Not present

Last activity date Not present

Expiration date Not present

Birth date Not present

Patron relative dates filters

Registration date between Days ago and the report run date

Update date between Days ago and the report run date

Last activity date between Days ago and the report run date

Expiration date between Days ago and the report run date

Expiration date more than Days before the report run date

Last activity date more than Days before the report run date

Registration date more than Days before 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.

– Patron miscellaneous filters

<input type="checkbox"/> Charges	Greater than or equal to ▾	<input type="text"/>
<input type="checkbox"/> Credits	Greater than or equal to ▾	<input type="text"/>
<input type="checkbox"/> Claims	Greater than or equal to ▾	<input type="text"/>
<input type="checkbox"/> Lost items	Greater than or equal to ▾	<input type="text"/>
<input type="checkbox"/> YTD circ	Greater than or equal to ▾	<input type="text"/>
<input type="checkbox"/> Lifetime circ	Greater than or equal to ▾	<input type="text"/>
<input type="checkbox"/> Gender	N/A ▾	<input type="checkbox"/> Not present
<input type="checkbox"/> Notification option	Mailing Address ▾	
<input type="checkbox"/> Postal code range	<input type="text"/> <input type="text"/>	
<input type="checkbox"/> Email address	<input checked="" type="radio"/> Present <input type="radio"/> Not present <input type="radio"/> Incorrectly formatted	
<input type="checkbox"/> Alternate email address	<input checked="" type="radio"/> Present <input type="radio"/> Not present <input type="radio"/> Incorrectly formatted	
<input type="checkbox"/> Address (of the type specified above)	<input checked="" type="radio"/> Present <input type="radio"/> Not present	
<input type="checkbox"/> Any address	<input checked="" type="radio"/> Present <input type="radio"/> Not present	
<input type="checkbox"/> Mobile phone	<input checked="" type="radio"/> Present <input type="radio"/> Not present	
<input type="checkbox"/> Mobile phone carrier	<input checked="" type="radio"/> Present <input type="radio"/> Not present	
<input type="checkbox"/> Telephone 1	<input checked="" type="radio"/> Present <input type="radio"/> Not present	
<input type="checkbox"/> Patron record is secured		
<input type="checkbox"/> Use patron legal name on print/phone notices		

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

– Patron miscellaneous filters

<input checked="" type="checkbox"/> Charges	Greater than or equal to ▾	<input type="text" value="50.00"/>
---	----------------------------	------------------------------------

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

<input checked="" type="checkbox"/> YTD circ	Greater than or equal to ▾	<input type="text" value="30"/>
--	----------------------------	---------------------------------

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.

– Patron user defined fields filters

<input type="checkbox"/> (User 1) Local Use	<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> (User 2) Parent/Guardian	<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> (User 3) PSTAT2	<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> (User 4) PSTAT3	<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> (User 5) Staff Initials	<input type="text"/>	<input type="checkbox"/> Not present

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.

– Patron user defined fields filters

(User 1) Local Use Not present

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

– Patron user defined fields filters

(User 1) Local Use Not present

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

Download report output

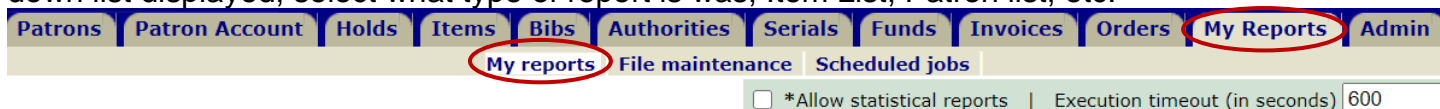
Save report parameters for later use

Report name

Report description  **Save report parameters**

Create patron record set from report results

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 it was, Item List, Patron list, etc.



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

My reports File maintenance Scheduled jobs

*Allow statistical reports | Execution timeout (in seconds) 600

Saved reports

Select one or more report types

- Item statistical reports
- Patron account count reports
- Patron account list reports
- Patron account statistical reports
- Patron count reports
- Patron list reports
- Patron statistical reports
- Purchase order list reports
- Purchase order summary reports
- Serials count reports
- Serials list reports
- Serials statistical reports

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	FLLS Most Frequent Users 2019	Most frequent users in 2018 and 2019	09/29/2020	09/29/2020	jshonk	Patron list reports	Delete Edit

Schedule reports **Run reports**

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 screenshot shows the 'My Reports' tab selected in a navigation bar. Below the navigation bar, there are tabs for 'My reports', 'File maintenance', and 'Scheduled jobs'. A checkbox for '*Allow statistical reports' is checked, and an 'Execution timeout (in seconds)' field is set to 600.

Under the 'Saved reports' section, a dropdown menu is open, listing various report types. 'Patron list reports' is selected and highlighted.

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	FLLS Most Frequent Users 2019	Most frequent users in 2018 and 2019	09/29/2020	09/29/2020	jshonk	Patron list reports	Delete Edit

At the bottom of the interface, the 'Schedule reports' button is circled in red, next to a 'Run 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**

Report number	Report name	Report description
531	FLLS Most Frequent Users 2019	Most frequent users in 2018 and 2019

Schedule name (required)

Schedule description (optional)

Schedule start date

Schedule expiration date (leave blank to never expire)

Schedule Options

Run one time on (date) At :

Run weekly on (day of week) At :

Run monthly on the (day of month) At :

Run daily At :

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.

My reports | **File maintenance** | **Scheduled jobs**

File maintenance (Click on the file name to open the file)

Select all

Select

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**.

My reports
File maintenance
Scheduled jobs

Scheduled jobs

Daily schedules
 Weekly schedules
Monthly schedules
 One time schedules

View	Name	Description	Pattern	Created	Status	Begins	Last run	Actions
+	FLLS Most Frequent Users 2019	Most frequent users in 2018 and 2019	Runs once a month on day 1 at 00:00	09/29/2020	Never been run	09/29/2020	Never run	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Delete</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Edit</div>

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

Questions? Comments? Contact:



Computer Network Services Department
 Finger Lakes Library System
 1300 Dryden Road, Ithaca, NY 14850
 (607) 273-4074 x237 or efranks@flls.org