

# Guide to SimplyReports

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## What is SimplyReports?

SimplyReports gathers data from the Polaris database, allowing you to create reports about your patrons, patron account transactions, holds, and items. SimplyReports provides you with information you would expect to find in the Reports and Notices feature in the Polaris Integrated Library System, yet is more robust and gives you more control. SimplyReports allows you to select the values, parameters, and format to create truly customizable reports.

Use the following guide to familiarize yourself with the features of SimplyReports. It explains the tabs, subtabs, and filters found in SimplyReports. There is also a listing of sample reports to get you started.

### Goal of Guide to SimplyReports

Upon successful completion of this Guide, you will be able to:

1. Locate common controls.
2. Navigate within the application.
3. Construct custom reports for use in your library.

To successfully complete this objective, you should be able to:

1. Differentiate between the patron, patron account, holds, and items tabs and subtabs.
2. Identify the necessary parameters for the report you would like to create.
3. Locate and select necessary parameters.
4. Sort the parameters in the appropriate order.
5. Apply relevant filters to refine the report.
6. Execute the creation of the report.
7. Modify, if necessary, report parameters in order to refine the report output.

### SimplyReports Tips:

- If you select a filter by checking the check box and *do not* select a value by highlighting it, SimplyReports will use *all* the values. For instance, if you check "Collection" in the Item general filters but do not highlight a specific collection, the report will gather data and show all the collections.
- To select more than one value in a menu, hold down the **CTRL** key and click on the values. To deselect one value when many are selected, hold down the **CTRL** key and click on the value you want to deselect.
- To select a block of values, click on the value at the top of the list to highlight it and then hold down the **SHIFT** key and select the value at the bottom of the list of values you want to select. This will highlight all the values in that range.
- If you do not move the values from the **Columns selected for output** list into the **Columns selected for sort**, the report you create will be sorted by the order they appear in the **Columns selected for output** list.
- You can safely maximize (+) and minimize (-) the filter lists while creating a report without losing the information you select.

## Patron Tab

When you select the *Patron* tab, you will be able to create reports using data from patron registration records, records associated with patron records, and transactions involving patron records.

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### Select Report

To get started, select a sub-tab:

*Patron list reports* will create reports with detailed patron information, such as names and addresses, if specified in the output columns. Example: show the names of patrons with three or more lost items.

*Patron count reports* will create reports with the number of patron records that meet the criteria you set. Example: show the number of patrons your branch has by postal code.

*Patron statistical reports* will gather data the list and count reports retrieve, but will also gather data on transactions. Example: show the number of check out transactions by workstation on an hourly basis for a given period of time.

### Select Limits

1. If you are performing a Patron list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
2. Likewise, if you are performing either a Patron list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

### Select Data and Format

1. Select one or more lines from the **Report output columns** list.
2. Click  to move the entries into the **Columns selected for output** list.
3. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click  to copy them into the **Columns selected for sort list**.
4. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

### Select Filters and Submit Data

See the following pages for an explanation of the various filters.

Click **Submit** once all parameters have been selected.

## Patron Filters

**Patron**

Patron list reports Patron count reports

Patron general filters

Patron record set ABOA moved patrons

Branch

Patron code

Statistical class

Language

If your library has created a record set, this feature will limit output to the records belonging to that specific set.

Select your library to limit output to only your library information. If you wish to choose more than one library, click on the library while holding the **CTRL** key.

Selecting one or more codes from this list will limit output to patron records with those codes.

Selecting a statistic class will limit output to patron records with those classes. You must have the branch filter selected in order to use this filter. Selecting **Null values only** limits reports to patrons who do not have a statistical class.

Limits output to patron records that indicate any of the selected languages as the person's preferred language.

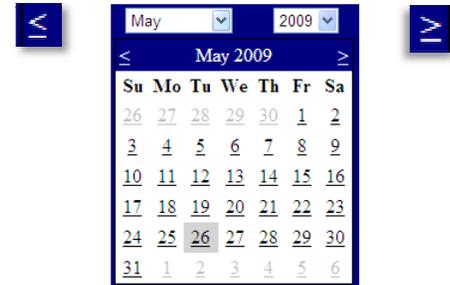
– Patron date filters

Patron date criteria

- Patron registration date   to    Null values only
- Patron update   to    Null values only
- Last activity date   to    Null values only
- Expiration date   to    Null values only
- Birth date   to    Null values only

If you select **Null values only**, it will only retrieve records where the date field is empty.

In order to filter by date, you must select *from* and *to* dates using the calendar icons. Use the drop down menu or click on the arrows or calendar to select specific dates.



– 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

Relative date filters limit the results to dates within a certain period before the report run date, or dates earlier than a selected number of days before the run date.

If you would like to save the parameters of a report to run again another time, use the relative date filter to ensure your dates don't stay the same.

– Patron miscellaneous filters

<input checked="" type="checkbox"/> Charges (amount)	Greater than or equal to <input type="text"/> Greater than or equal to <input type="text"/> Less than or equal to <input type="text"/>	<input type="text"/>	Specify the report to include patrons who have charges, credits, claims, and/or losses greater than, less than or equal to the dollar amount that you set.
<input checked="" type="checkbox"/> Credit (amount)	Greater than or equal to <input type="text"/>	<input type="text"/>	Limit reports to patrons who have checked out or renewed as many items or more/less times than the number in the box.
<input checked="" type="checkbox"/> Claim count	Greater than or equal to <input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/> Lost item count	Greater than or equal to <input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/> YTD circ (count)	Greater than or equal to <input type="text"/>	<input type="text"/>	Limit the output to only male or female patrons, or to patrons who have either nothing or N/A checked off in their record.
<input checked="" type="checkbox"/> Lifetime circ (count)	Greater than or equal to <input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/> Gender	Male <input type="text"/> Male Female No response NULL		
<input checked="" type="checkbox"/> Notification option	Mailing Address <input type="text"/>	Limit the output to patrons with specific delivery methods.	
<input checked="" type="checkbox"/> Postal code range	from: <input type="text"/> to: <input type="text"/>	Limit to patrons within a postal code range.	
<input checked="" type="checkbox"/> Email address	<input checked="" type="radio"/> Present <input type="radio"/> NULL <input type="radio"/> Incorrectly formatted	<b>Present</b> limits to patrons with an email address; <b>NULL</b> limits to patrons without an email address; <b>Incorrectly formatted</b> limits to incorrectly formatted addresses.	
<input checked="" type="checkbox"/> Address (of the type specified above)	<input checked="" type="radio"/> Present <input type="radio"/> Not present	Limit reports to records with the selected address type. <b>Not present</b> limits to records that do not have an address of that type.	
<input checked="" type="checkbox"/> Any address	<input checked="" type="radio"/> Present <input type="radio"/> Not present	Limit reports to records with or without any type of address.	

– Patron user defined fields filters

- (User 1) Where They Live   Null values only
- (User 2) Parent/Guardian (LastName, FirstName)   Null values only
- (User 3) Local Library Statistic #1   Null values only
- (User4) Local Library Statistic #2   Null values only
- (User 5) Local Library Statistic #3   Null values only

Limit reports by the user-defined fields that are set up in the Patron Record workflow.

Select **Null values only** to limit to records without any assigned value.

– Patron ID filters

- Extract records from patron ID   
to

The report will be filtered by the patron IDs that are within this range.

## Patron Account Tab

When you select the *Patron Account* tab, you will be able to create reports using data from patron-related financial transactions in order to track trends, produce lists of financial transactions, and produce statistical reports related to patron financial transactions.

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### Select Report

To get started, select a sub-tab:

*Patron Account list reports* will create reports with detailed patron account information.

Example: show the names and addresses of patrons with more than \$20 in charges.

*Patron Account count reports* will create reports with counts related to patron account data.

Example: show the number of accounts sent to a collection agency.

*Patron Account statistical reports* will gather data the list and count reports retrieve, but will also gather data on transactions. Example: show the number and total amount of waived transactions by user.

### Select Limits

3. If you are performing a Patron Account list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
4. Likewise, if you are performing either a Patron Account list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

### Select Data and Format

5. Select one or more lines from the **Report output columns** list.
6. Click  to move the entries into the **Columns selected for output** list.
7. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click  to copy them into the **Columns selected for sort list**.
8. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

### Select Filters and Submit Data

See the following pages for an explanation of the various filters.

Click **Submit** once all parameters have been selected.

## Patron Account Filters

**Patron account**

**Patron account list reports**

– Patron account general filters

<input checked="" type="checkbox"/> Reason (or fee reason)	<div style="border: 1px solid gray; padding: 2px;">         None given          Card Replacement          Collection Agency          Credit Card Processing Charge       </div>	→	Limit report output to the selected reason for fees. Select multiple reasons by holding the <b>CTRL</b> while clicking on individual reasons or holding the <b>SHIFT</b> key to select a group of reasons.
<input checked="" type="checkbox"/> Method	<div style="border: 1px solid gray; padding: 2px;">         None given          Cash          Check          Collection Agency       </div>	→	Limit to accounts where payments were made by the selected method(s).
<input checked="" type="checkbox"/> Organization	<div style="border: 1px solid gray; padding: 2px;">         Acadia Municipal Library          Acme Municipal Library          Airdrie Public Library          Alberta Beach Municipal Library       </div>	→	Limit to accounts from your library.
<input checked="" type="checkbox"/> Transaction creator	<div style="border: 1px solid gray; padding: 2px;">         AWMVolunteer          YAWMavolunteer          YAWMblalonde          YAWMdamold       </div>	} →	Limit the report output to patron account transactions that were entered by the selected staff member(s) and/or workstation(s).
<input checked="" type="checkbox"/> Transaction workstation	<div style="border: 1px solid gray; padding: 2px;">         AAVpublic1          AAVpublic2          AAVstaff1       </div>		

– Patron account miscellaneous filters

<input checked="" type="checkbox"/> Transaction amount	Greater than <span style="border: 1px solid gray; padding: 2px;"> </span>	Similar to Patron miscellaneous filters in Patron Filters. Enter amounts to see patron accounts with outstanding charges and credits greater than, less than or equal to the amount you enter.
<input checked="" type="checkbox"/> Charges (amount)	Greater than or equal to <span style="border: 1px solid gray; padding: 2px;"> </span>	
<input checked="" type="checkbox"/> Credit (amount)	Greater than or equal to <span style="border: 1px solid gray; padding: 2px;"> </span>	

**- Transaction date filters**

- Transaction date  to:
- Transaction date between  Days ago and the report run date
- Transaction date more than  Days before the report run date

Similar to Patron date filters, this filter will limit the report output to transactions within a certain period of time.

**- Item filters**

- Item assigned branch
- Item assigned collection
- Item material type
- Item status

Limit output to transactions involving items that belong to the selected branch.

Limit to a specific collection or collections.

Limit output by selected material type(s).

Limit output by selected item status.

- + Patron filters
- + Patron date filters
- + Patron relative date filters
- + Patron miscellaneous filters
- + Patron user defined field filters
- + Patron ID filters

For explanation of these filters, see Patron Filters on pages 2-5.

### Transaction Type option for Patron Account List Report

**Transaction type (select at least one)**  
 Charges  Credits  Deposits  Transaction summary

Check the appropriate box to include accounts where:

- there are charges owed
- there are credits
- there are deposits
- there is a zero balance for all credits and charges

### Outstanding Balance and History Options for Patron Account Count Report

<p><b>Outstanding balance options:</b> The options below may be used with 'Sum - balance'</p> <p><input checked="" type="radio"/> Outstanding charges</p> <p><input type="radio"/> Outstanding credits</p> <p><input type="radio"/> Outstanding deposits</p>	<p><b>History options:</b> The options below may be used with 'Sum - transaction amount'</p> <table border="0"><tr><td><input type="radio"/> Payment history</td><td><input type="radio"/> Waive existing charge history</td></tr><tr><td><input type="radio"/> Refund history</td><td><input type="radio"/> Waive history</td></tr><tr><td><input type="radio"/> Forfeit from deposit history</td><td><input type="radio"/> Auto-waive history</td></tr><tr><td><input type="radio"/> Return from deposit history</td><td><input type="radio"/> All waive history</td></tr></table>	<input type="radio"/> Payment history	<input type="radio"/> Waive existing charge history	<input type="radio"/> Refund history	<input type="radio"/> Waive history	<input type="radio"/> Forfeit from deposit history	<input type="radio"/> Auto-waive history	<input type="radio"/> Return from deposit history	<input type="radio"/> All waive history
<input type="radio"/> Payment history	<input type="radio"/> Waive existing charge history								
<input type="radio"/> Refund history	<input type="radio"/> Waive history								
<input type="radio"/> Forfeit from deposit history	<input type="radio"/> Auto-waive history								
<input type="radio"/> Return from deposit history	<input type="radio"/> All waive history								

In order to use this option, you must first select **Sum-balance (outstanding balance only)** in the **Report output column box** and move it to the **Report output column box**. Then select whether you want to view outstanding charges, credits or deposits.

In order to use this option, you must first select **Sum-transaction (history)** in the **Report output column box** and move it to the **Report output column box**. The sum will show the total amount of the history requested.

## Holdings Tab

When you select the **Holdings** tab, you will be able to create list, count, and statistical reports about hold requests, records associated with hold requests, and transactions involving hold requests.

---

### Select Report

To get started, select a sub-tab:

**Hold list reports** will create reports with detailed information on hold requests. Example: show the holds placed during the previous month.

**Hold count reports** will create reports with counts related to hold requests. Example: show the top 10 requested titles of the month.

**Hold statistical reports** will gather data the list and count reports retrieve, but will also gather data on transactions. Example: show the number of holds that are created each day during a given time period.

### Select Limits

5. If you are performing a Holdings list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
6. Likewise, if you are performing either a Holdings list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

### Select Data and Format

9. Select one or more lines from the **Report output columns** list.
10. Click  to move the entries into the **Columns selected for output** list.
11. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click  to copy them into the **Columns selected for sort list**.
12. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

### Select Filters and Submit Data

See the following pages for an explanation of the various filters.

Click **Submit** once all parameters have been selected.

## Hold Filters

**Holds**

**Holds list reports** | **Holds count reports**

– **Hold general filters**

Pickup branch

Acadia Municipal Library  
Acme Municipal Library  
Airdrie Public Library  
Alberta Beach Municipal Library

Limit output to requests where the request pickup library is the selected branch(es).

Hold status

Active  
Cancelled  
Expired  
Held

Limit the report to hold requests with specific status or statuses.

Origin of request

None given  
None given  
PAC request  
Library - tech client  
NCIP

Limit report to hold requests places through the online catalogue (PAC), by library staff, NCIP, or none given.

Item specific requests  
 Suspended requests  
 Unlocked requests

Limit the output to item-level hold requests; suspended hold requests; and unlocked hold requests.

– **Hold date filters**

Hold activation date

to:

Hold creation date

to:

Hold expiration date

to:

Hold notification date

to:

Hold till date

to:

Using the calendar icons, limit the report output to hold requests with the various dates.

To save the parameters for a future report use the **Hold relative date filters**.

– Item filters

See Item filters on page 8.

– Bibliographic record filters

Primary type of material   
Printed or Manuscript Music  
Cartographic Material  
Visual Materials

Publication year  to:

Bibliographic record ID   
to:

Limit records to specific bibliographic characteristics.

Limit materials by date of publications.

Limit by bibliographic record IDs.

Holds

Holds count reports

There are **optional filters** in the **Holds count report**.

**Optional:**

Select 'top' (number)  most requested titles

Number of requests Greater than

Number of **holdable** items Greater than

Assigned branch  
Acadia Municipal Library  
Acme Municipal Library  
Airdrie Public Library  
Alberta Beach Municipal Library

Item status  
In  
Out  
Out-III  
Being Held

Type a number to get the top-most requested titles.

Include titles with hold requests greater than, less than or equal to the specified number.

Include titles with a number of holdable items  $\geq$ ,  $\leq$ , or  $\neq$  the number you enter.

Select the library for a count of holds placed on its item records.

Select status or statuses to count holds with these types of statuses.

## Items Tab

When you select the *Items* tab, you will be able to create list, count, and statistical reports based on item information, such as tracking trends for collection development, creating weeding lists, and following staff activity.

---

### Select Report

To get started, select a sub-tab:

*Items list reports* will create reports with detailed information on hold requests. Example: create a list of all the other language material you own at your branch.

*Items count reports* will create reports with counts related to hold requests. Example: get a count of patrons who go to other libraries to check out materials.

*Items statistical reports* will gather data the list and count reports retrieve, but will also gather data on transactions. Example: see the daily statistics for check out transactions by workstation.

### Select Limits

7. If you are performing a Items list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
8. Likewise, if you are performing either an Items list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

### Select Data and Format

13. Select one or more lines from the **Report output columns** list.
14. Highlight lines by clicking on them and click  to move the entries into the **Columns selected for output** list.
15. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click  to copy them into the **Columns selected for sort list**.
16. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

### Select Filters and Submit Data

See the following pages for an explanation of the various filters.

Click **Submit** once all parameters have been selected.

# Items Filters

**Items**

**Item list reports**

**Item general filters**

<input checked="" type="checkbox"/> Item record set	<input type="text" value="5 libraries"/>	→	Limit report output to a specific record set.
<input checked="" type="checkbox"/> Assigned branch	<ul style="list-style-type: none"><li>Acadia Municipal Library</li><li>Acme Municipal Library</li><li>Airdrie Public Library</li><li>Alberta Beach Municipal Library</li></ul>	→	Limit output to the selected assigned branch or branches.
<input checked="" type="checkbox"/> Collection	<ul style="list-style-type: none"><li>Aboriginal</li><li>Atlases</li><li>Audio Visual</li><li>Audio Visual Equipment</li></ul> <input type="checkbox"/> Null values only	→	Limit report output to a specific collection. <b>Null values only</b> limits to records without a specific collection.
<input checked="" type="checkbox"/> Creator	<input type="text" value="aaatest"/>	} →	Limit output to records created or modified by selected user(s).
<input checked="" type="checkbox"/> Modifier	<input type="text" value="aaatest"/>		
<input checked="" type="checkbox"/> Donor	<input type="text" value="French Language Resource Project. No name given"/>	→	Limit output to items donated by the selected donor.
<input checked="" type="checkbox"/> Fine code	<ul style="list-style-type: none"><li>\$0.00</li><li>\$0.10 / \$10.00</li><li>\$0.20 / \$10.00</li><li>\$0.25 / \$10.00</li></ul>	→	Limit output to item records with selected fine code(s).
<input checked="" type="checkbox"/> Home branch	<ul style="list-style-type: none"><li>Acadia Municipal Library</li><li>Acme Municipal Library</li><li>Airdrie Public Library</li><li>Alberta Beach Municipal Library</li></ul>	→	Limit output to the selected home branch or branches.
<input checked="" type="checkbox"/> History action	<ul style="list-style-type: none"><li>Item created via Circulation</li><li>Item created via ILL processing</li><li>Item created via NCIP create processing</li><li>Item created via Serials</li></ul>	→	Limit output to records with selected history action.

Loan period

0 days  
1 days  
14 days  
2 days  
21 days  
28 days

Limit output to item records with selected fine code(s).

Material type

Book  
Book - DAISY  
Book - Downloadable Audio  
Book - Large Print

Limit output to specific types of material.

Owner

Alice B. Donahue Library and Archives (Branch)  
Alice Melnyk Public Library (Branch)  
Anne Chorney Public Library (Branch)  
Ashmont Public Library (Branch)

Limit to item records owned by a specific branch or branches.

Shelf location

Aboriginal -- (org: 10)  
Aboriginal -- (org: 100)  
Aboriginal -- (org: 101)  
Aboriginal -- (org: 102)  
Aboriginal -- (org: 103)  
Aboriginal -- (org: 104)

Limit to items in a specific shelf location. There are many org locations listed for one shelf location. Select all of the org locations for the shelf location you want by using the Ctrl+Shift and ensure your branch is selected in Assigned Branch.

Stat code

Select a branch first!  Null values only

Limit to item records with selected statistical codes. A branch must be selected first.

Circ status

In  
Out  
Out-III  
Being Held

Limit output to items with the specific circulation status.

### Item date filters

Acquisition date

to:

Creation date

to:

Due date

to:

First available date

to:

Enter a time range using the calendars to limit output to records with specific date ranges.

When:

- item was acquired
- item record was created
- item is due
- item becomes available

<input checked="" type="checkbox"/> Item record history transaction date *	<input type="text"/>	to:	<input type="text"/>	
<input checked="" type="checkbox"/> Imported date	<input type="text"/>	to:	<input type="text"/>	
<input checked="" type="checkbox"/> In-transit received date	<input type="text"/>	to:	<input type="text"/>	<input type="checkbox"/> Null values only
<input checked="" type="checkbox"/> In-transit sent date	<input type="text"/>	to:	<input type="text"/>	<input type="checkbox"/> Null values only
<input checked="" type="checkbox"/> Last check in date	<input type="text"/>	to:	<input type="text"/>	
<input checked="" type="checkbox"/> Last check out or renewal date	<input type="text"/>	to:	<input type="text"/>	<input type="checkbox"/> Null values only
<input checked="" type="checkbox"/> Last circ transaction date	<input type="text"/>	to:	<input type="text"/>	<input type="checkbox"/> Null values only
<input checked="" type="checkbox"/> Last circ status change date	<input type="text"/>	to:	<input type="text"/>	
<input checked="" type="checkbox"/> Last inventory date	<input type="text"/>	to:	<input type="text"/>	<input type="checkbox"/> Null values only
<input checked="" type="checkbox"/> Last overdue notice date	<input type="text"/>	to:	<input type="text"/>	
<input checked="" type="checkbox"/> Modification date	<input type="text"/>	to:	<input type="text"/>	
<input checked="" type="checkbox"/> Record status date	<input type="text"/>	to:	<input type="text"/>	

- item history transactions were made
- item was imported into Polaris
- item was in-transit and was received within specified time period
- item was sent from another library
- item was last checked in
- item was last checked out or renewed
- item was last circulated
- circulation status of item changed
- item was last inventoried
- an overdue notice about item was sent
- item record was last modified
- item record status changed

**– Item call number filters**

<input checked="" type="checkbox"/> Prefix	<input type="text"/>	to:	<input type="text"/>
<input checked="" type="checkbox"/> Classification number	<input type="text"/>	to:	<input type="text"/>
<input checked="" type="checkbox"/> Cutter	<input type="text"/>	to:	<input type="text"/>
<input checked="" type="checkbox"/> Suffix	<input type="text"/>	to:	<input type="text"/>

Type **from** and **to** ranges for any of these fields to limit to items within those ranges.

**– Item circulation filters**

<input checked="" type="checkbox"/> Lifetime circulation	Less than or equal to	<input type="text"/>
<input checked="" type="checkbox"/> Lifetime inhouse use	Less than or equal to	<input type="text"/>
<input checked="" type="checkbox"/> Renewal limit	Equal to	<input type="text"/>
<input checked="" type="checkbox"/> YTD circulation	Less than or equal to	<input type="text"/>
<input checked="" type="checkbox"/> YTD in-house use	Less than or equal to	<input type="text"/>



Select **Less than or equal to**, **Equal to**, or **Greater than or equal to** and type a number to limit to items with specific circulation statistics.

– Item check in & in-transit filters

<input checked="" type="checkbox"/> Check in branch	Acadia Municipal Library Acme Municipal Library Airdrie Public Library Alberta Beach Municipal Library
<input checked="" type="checkbox"/> Check in user	PolarisSuperuser PolarisExec OPAC Default Staff User
<input checked="" type="checkbox"/> Check in workstation	trac-dev TRAC-PROD lorish-srv64
<input checked="" type="checkbox"/> In-transit sending branch	Acadia Municipal Library Acme Municipal Library Airdrie Public Library Alberta Beach Municipal Library
<input checked="" type="checkbox"/> In-transit receiving branch	Acadia Municipal Library Acme Municipal Library Airdrie Public Library Alberta Beach Municipal Library

Limit output to item's check in status by:

- selected branch(es) where an item was checked in
- selected staff member(s) who checked item in
- selected workstation where item was checked in

Limit output to item's in-transit status by:

- selected branch(es) that sent item in
- selected branch(es) from where item was received after being in-transit.

– Item checkbox filters

These filters refer to specific check boxes on the Item Record workform. See where the information from the filters is derived from below.

The screenshot shows the 'Item Record' workform for a book titled 'Harry Potter and the half-blood prince'. The form includes fields for Barcode, Title, Author, Call no., Price, and various identification and circulation parameters. A red box highlights the Call number fields: Scheme (Dewey Decimal), Prefix (J), Class, Cutter (ROW), Suffix, Vol, and Copy. Red arrows point from filter boxes to specific fields: 'Exclude items without barcodes' points to the Barcode field; 'Show only circulating items' and 'Show only non-circulating items' point to the Circ status field; 'Show only items that do not display in PAC' and 'Exclude items that do not display in PAC' point to the Display in PAC checkbox; 'Show only items with a price' and 'Show only items without a price' point to the Price field; 'Show only holdable items' and 'Show items that are not holdable' point to the Holdable checkbox; 'Pickup at this branch not checked' and 'Pickup at this branch checked' point to the Pickup at this branch checkbox; 'Patrons from this library and branches checked' and 'Patrons from this library and branches not checked' point to the Patrons from this library and branches checkbox; 'Patrons from this branch only not checked' and 'Patrons from this branch only checked' point to the Patrons from this branch only checkbox; 'Preferred lenders not checked' and 'Preferred lenders checked' point to the Preferred borrowers checkbox; and 'Item call number is NULL' and 'Item call number is NOT NULL' point to the Call number fields. A note at the bottom states: 'If NULL—fields will be blank.'

### – Item record ID filters

Extract records from item record ID  To

Filter to items within a specific ID range.

### – Bibliographic record filters

- Bib record language
- MARC literary form
- MARC target audience

Limit to items linked to bib records with the selected language(s).

Limit to items linked to bib records with selected form(s).

Limit to items linked to bib records with selected target audience(s).

See also: Bibliographic record filters, page 12.

### + Patron general filters

### + Patron date filters

### + Patron miscellaneous filters

### + Patron ID filters

See Patron filters, pages 2-5.

## Statistical Reports

Features in Statistical reports sub-tabs appear similar in the various tabs. See related tabs for explanation of the filters.

Running a report may slow your system's performance so it is recommended to leave the **Run report now** check box unchecked.

Run report now | Execution timeout (in seconds) 300

### Statistical Reports

Statistical categories

Available subcategories

Selecting a statistical category will determine the available subcategories.

Report type

Detail level

The selected report type determines the detail level.

### Report focus:

Run report by transacting organization only  Include transacting user detail  Include transacting workstation detail

Does not include details about the user or workstation.

### Transacting branch

Acadia Municipal Library  
Acme Municipal Library  
Airdrie Public Library  
Alberta Beach Municipal Library  
Alder Flats Public Library  
Alice B. Donahue Library and Archives

Include branch name  
 Include branch abbreviation  
 Include branch ID  
 Combine branch totals

Select the branch where the action took place.

### User

aaatest  
AABMVolunteer  
AAFchaffee  
AAFSrseely  
AAFVolunteer  
ABARRhthompson

### Workstation

22040116aw07241  
22040116aw10826  
22050124TW10607  
22060111Tw09280  
22140101SW08969

Depending on the selected report focus, these boxes will be activated and you will be able to select specific users or workstations.

Date range Start date   End date    
 Relative date  Days ago - to run date

Specify a date range using the calendar icons, or choose period of time relative to the report run date.

## Saved Reports

When you select the parameters and click “submit” to create a report, a new window will appear with the report data as well as the following options:

The screenshot shows a form with three checkboxes: "Download report output", "Save report parameters for later use", and "Create patron record set from report results". A red box highlights the first two checkboxes, with an arrow pointing to a text box that says: "To download a file of the report, check this box and a file will appear for you to download." Another red box highlights the "Save report parameters for later use" checkbox, with an arrow pointing to a text box that says: "Type in a name and description for the report and then click **Save report parameters**." Below the checkboxes, there is a line of text: "There were 523 results, to download the report use the checkbox (above)."

Download report output

Save report parameters for later use

Create patron record set from report results

There were 523 results, to download the report use the checkbox (above).

Save report parameters for later use

Report name

Report description  **Save report parameters**

To download a file of the report, check this box and a file will appear for you to download.

Type in a name and description for the report and then click **Save report parameters**.

**NOTE:** When creating a report that includes dates, use the **relative dates filter** *not* the **dates filter**.

If you save a report to run later using specific dates set in the dates filter, it will run using *those specific dates*. Therefore, if you are looking to run a daily, weekly, or monthly report, set the parameters in the relative dates filter.

When you click the Saved Reports tab, you will have to select the report type you saved. When it is selected, you will see the available reports to run. Select the applicable report by clicking the checkbox and then click “Run reports.”

The screenshot shows the "Saved reports" section. At the top, there is a dropdown menu labeled "Select one or more report types" with "Patron list reports" selected. Below the dropdown is a "Help" button. Below that is a table with columns: "Select", "Report name", "Report description", "Creation date", "Last run date", "Creator", "Report type", and "Actions". The table contains one row with a checked checkbox, "ASGRenewals", "15/07/2009", "15/07/2009", "yristhero.z", "Patron list reports", and "Delete" and "Edit" buttons. Below the table are three buttons: "Schedule reports", "Run reports", and "Publish report". A red arrow points from the "Edit" button to a text box.

Saved reports

Select one or more report types

Patron count reports

Patron list reports

Patron statistical reports

Serials count reports

Serials list reports

Help

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input checked="" type="checkbox"/>	ASGRenewals		15/07/2009	15/07/2009	yristhero.z	Patron list reports	Delete Edit

Schedule reports Run reports Publish report

To edit the parameters of the report, click this button. However, you will **not** be able to change the filters, including the date.

## Sample Patron List Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Email list to send info to selected statistical class	Patron barcode Patron full name Patron statistical class description Email address Expiration date	Patron full name Expiration date	<b>Patron General Status</b> Branch Select Branch Statistical Class Select Statistical Class <b>Patron Miscellaneous Filters</b> Email Address Select Present
List of patrons with overdues	Item barcode Item status description MARC title MARC author Patron barcode Patron full name Patron lost item count	Patron full name	<b>Patron filters</b> Patron branch Select Branch  <b>Patron miscellaneous filters</b> Lost items Greater than or equal to <u>1</u>
Patrons with email notification but no email address	Patron barcode Patron full name  Patron code description Patron alt email address	Patron full name	<b>Patron general filters</b> Branch Select Branch  <b>Patron miscellaneous</b> Notification option Email address Email address Null
Patron Mailing List	Patron full name Patron street one Patron street two Patron city Patron state Patron postal code Patron alt email address	Patron full name Patron postal code	<b>General filter</b> Branch Select Branch
Expired Patron List with phone and email contact information	Patron full name Patron expiration date Patron phone 1 Patron email address	Patron full name Patron expiration date	<b>Patron general filters</b> Branch Select Branch <b>Patron date filters</b> Expiration date Select dates

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
List of Patrons by statistical class and birth date (to check for discrepancies)	Patron full name Patron barcode Patron birth date Patron statistical class description	Patron birth date Patron stat class description Patron full name	<b>Patron general filters</b> Branch                      Select Branch Statistical class (optional)      Select Class
List of Patrons with highest lifetime circulation	Patron full name Patron barcode Patron lifetime circ count	Patron lifetime circ count Patron full name	<b>Patron general filters</b> Branch                      Select Branch <b>Patron miscellaneous filters</b> Lifetime circ (count)              Select number

## Sample Patron Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Total # of patrons by branch	Branch name	Branch name	<b>Patron general filter</b> Branch                      Select branch
Total # of patrons added by your library in the last year	Branch name Code description	Code description	<b>Patron general filter</b> Branch                      Select branch <b>Date filter</b> Registration date              Enter dates
Total # of patrons by statistical class	Patron statistical category	Patron statistical category	<b>Patron general filter</b> Branch                      Select branch
Patron YTD circulation by postal code	Patron postal code Patron city Sum patron YTD circ count	Patron postal code Patron city	<b>Patron general filter</b> Branch                      Select branch

## Sample Patron Account List Reports

Patrons with charges for replacement costs	Acct reason (or fee reason) MARC author MARC title Acct trans. balance - outstanding chgs Acct transaction branch abbrev Patron barcode Patron full name	Acct trans balance-outstanding chgs Patron full name Acct trans. Balance-outstanding chgs	<b>Transaction Type</b> Charges <b>Patron account general filters</b> Reason Replacement cost <b>Patron account miscellaneous filters</b> Charges Greater than or equal to <b>Patron filters</b> Patron branch Select branch
Amount of outstanding charges for overdue items	Acct transacting branch name Patron code description Sum balance (outstanding balance only)	Acct transacting branch name Patron code description	<b>Outstanding balance options</b> Outstanding charges <b>Patron account general filters</b> Fee reason Overdue items

## Sample Patron Account Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Amount of outstanding charges by branch	Acct transacting branch name Patron code description Sum balance	Acct transacting branch name	<b>Outstanding balance options</b> Outstanding charges
Number and amount of charges by stat class and branch	Patron statistical class description Patron Code description Acct transaction type Sum-balance (outstanding balance)	Patron statistical class description	<b>Outstanding balance options</b> Outstanding charges <b>Patron filters</b> Patron branch      Select branch

## Sample Holds List Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Hold request placed during the last month	Hold creation date Hold last status transition date MARC browse author MARC browse title Hold status description Item assigned branch abbrev	Hold creation date Hold status description MARC browse author MARC browse title	<b>Hold general filters</b> Pick up branch <b>Hold date filters</b> Hold creation date
List of items being held at other libraries	Item assigned branch name Item status description MARC browse author MARC browse title Hold activation date Hold till date Hold pickup branch name Hold status description	Hold pickup branch name MARC browse title	<b>Hold general filters</b> Hold status                      Held <b>Item filters</b> Item assigned branch                      Select your branch

## Samples Holds Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Hold requests exceeding # of local copies available	MARC browse author MARC browse title	MARC browse title	<b>Optional</b> Number of requests greater than Number of holdable items less than Assigned branch                      Select branch <b>Hold general filter</b> Pickup branch                            Select branch <b>Hold date filters</b> Hold creation date                      Select dates
Top Requested Titles of the Last Month	MARC bibliographic record MARC browse author MARC browse title MARC primary type of material description	MARC browse author	<b>Optional</b> Select top # most requested files <b>Holds general filters</b> Pickup branch                            Select branch <b>Holds date filters</b> Hold creation date                      Select dates

## Sample Items List Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Claimed items within the last # of days	Item barcode Item circ status description MARC author MARC Title Patron full name for claimed item Patron barcode for claimed item	Patron full name for claimed item MARC Title MARC author	<b>Item General Filters</b> Assigned branch      Select a branch Circ status            Claims returned Claims never had  <b>Item Relative Date Filter</b> Last circ status change date between      # days ago and the report run date
Lost/Missing Items within the last # of days	Item barcode Item lost date Item circ status description MARC author MARC title Patron full name for lost item Patron barcode for lost item Item lifetime circ ( <i>optional</i> )	Patron full name for lost item MARC title MARC author	<b>Item General Filters</b> Assigned branch      Select a branch Circ status            Lost  <b>Item Date Filter</b> Last check out or renewal      Select date
In House YTD Count by Collection	Item assigned collection name Sum item YTD inhouse use count	Item assigned collection name	<b>Item General Filters</b> Assigned branch      Select a branch Collection              Select a collection
Most popular items in a collection in the last year	Item assigned collection abbreviation Item call number MARC author MARC title Item last circ transaction date Item YTD circ count	Item assigned collection abbrev. Item last circ transaction date Item YTD circ count	<b>Item General Filters</b> Assigned branch      Select a branch Collection              Select a collection

List of French language items for a branch	Item assigned collection name Item barcode Item call number  MARC title MARC author	Item assigned collection name Item call number MARC author	<b>Items general filter</b> Items assigned branch      Select a branch  <b>Bibliographic record filters</b> Bib record language      French
Weeding list of Nonfiction Titles	Item call number MARC author MARC title Item barcode  Item lifetime circulation	Item call number MARC author	<b>Item general filter</b> Assigned Branch      Select a branch Collection      Nonfiction <b>Item date filters</b> Item last circ transaction date      1/1/1990 - 1/1/2006 (eg) Item lifetime count      less than or equal to <u>25</u>
Item records without a price	Item barcode Item assigned collection abbrev. Item call number MARC author MARC title Item circ status description  Item creation date	Item assigned collection abbrev. MARC title Item creation date	<b>Item general filter</b> Assigned branch      Select a branch Circulation status  <b>Item checkbox filters</b> Show only items without a price      Checked
Held Items Checklist	Item Call Number MARC browse title Item barcode Patron full name Patron phone  Patron email Hold Notification date Hold till date Hold expiration date		<b>Holds general filter</b> Pickup library      Select a branch Hold Status      Held

Item Records w/o barcodes	Item material type description Item call number MARC title MARC author  (Item assigned collection abbreviation)		<b>Item general filter</b> Assigned Branch (Collection)      Select branch (Select collection code) <b>Item checkbox filter</b> Show only titles w/o barcodes      checked
Item Records w/o call numbers	Item material type description Item call number MARC title MARC author  (Item assigned collection abbreviation)		<b>Item general filter</b> Assigned Branch (Collection)      Select branch (Select collection code) <b>Item checkbox filter</b> Item call number is NULL      checked
Items that do not show in PAC	Item barcode Item call number MARC author MARC title Item assigned collection abbreviation		<b>Item general filter</b> Assigned Branch      Select branch Record status      Final <b>Item checkbox filter</b> Show only items that do not display in PAC      checked
Check Items created or modified by a staff member	Item assigned collection abbreviation Item creation date Item barcode MARC title MARC author Item call number	Item assigned collection abbrev.	<b>Item general filter</b> Assigned branch      Select a branch Creator      Select an ID <i>Modifier</i> <i>Select an ID</i>

## Sample Items Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Count of what libraries your patrons are going to physically check out books	Patron Branch Name Item Check out Branch Name Item Check out branch abbreviation	Patron Branch Name	<b>Patron general filters</b> Branch <input type="text" value="Select a branch"/>