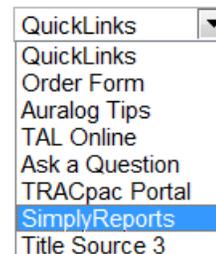
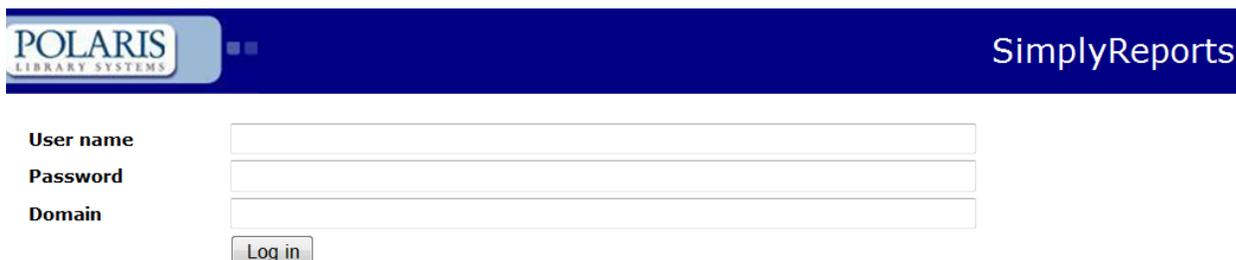


## How to Run a Shelf List Report in SimplyReports

1. Log on to SimplyReports from the Peace Library System website at <http://www.peacelibrarysystem.ab.ca>. On the main page choose **Simply Reports** from the **Quicklinks** dropdown box.



2. To log into SimplyReports, the username is your **Polaris username** and the password is your **Polaris password**. The domain is **PLS**. Click **Log in**.

A screenshot of the SimplyReports login page. The page has a dark blue header with the 'POLARIS LIBRARY SYSTEMS' logo on the left and 'SimplyReports' on the right. Below the header, there are three input fields labeled 'User name', 'Password', and 'Domain'. A 'Log in' button is located below the 'Domain' field.

3. The shelf list will be an item report, so click on the Items tab. It automatically defaults to Item list reports, which is what you want.



4. To indicate what information you want to be displayed in your report, in the **Report output columns** box, double click on the following search criterion to move them into the **Columns selected for output** box:

- Item call number
- Item barcode
- MARC title
- MARC pub year
- Item YTD circ count
- Item last circ transaction date
- Item lifetime circ count
- Item circ status description

Next, double click **Item call number** in **Columns selected for output** to move it to the **Columns selected for sort** box. This cause your results to be listed in proper Dewey order.

The screenshot shows a report configuration interface with three main sections:

- Report output columns:** A list of fields including Item checkout date, Item circ status ID, Item claimed date, Item classification number, Item copy number, Item creation date, and Item creator ID.
- Columns selected for output:** A list of fields including Item call number, Item barcode, MARC title, MARC pub year, Item YTD circ count, and Item last circ transaction date.
- Columns selected for sort:** A list containing only Item call number.

Below these sections are several options:

- Include header rows
- Text file
- Excel File
- Delimiter type: Comma & Quotes

At the bottom right, there are **Submit** and **Help** buttons.

5. Now you must set up filters to ensure that the results are specific for your library and for the call number range you want.

Under **Item general filters** put a check mark in the **Branch** box and select your library and scroll down and put a check beside **Record status** and select **Final**.

The screenshot shows the **Item general filters** section of the report configuration tool. It includes:

- Item record set:** A dropdown menu.
- Assigned Branch:**
  - Library quick pick
  - Branch (circled in red)
- Record status:**
  - Record status (circled in red)
  - A dropdown menu with options: Final (highlighted in blue), Provisional, and Deleted.

Next, to indicate the call number range you are looking for, from the **Item call number filters** type in the Dewey range you are searching for. Remember to put a checkmark in the **Classification number** box

Item date filters  
 Item relative date filters (between two dates)  
 Item relative date filters (prior to a specified date)  
 Item call number filters

<input type="checkbox"/> Prefix		to:		<input type="checkbox"/> Null values only
<input checked="" type="checkbox"/> Classification number	004	to:	006.9999	<input checked="" type="checkbox"/> Null values only
<input type="checkbox"/> Cutter		to:		<input type="checkbox"/> Null values only
<input type="checkbox"/> Suffix		to:		<input type="checkbox"/> Null values only
<input type="checkbox"/> Volume Number		to:		<input type="checkbox"/> Null values only
<input type="checkbox"/> Copy Number		to:		<input type="checkbox"/> Null values only

Item circulation filters  
 Item check in & in-transit filters

6. Hit submit to run the report

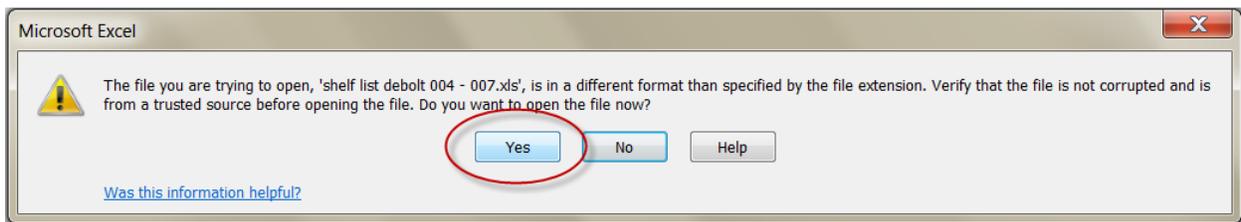
7. Download your results into Excel by first putting a checkmark in the box beside **Download report output** and then clicking on the white box with the blue arrow that appears

Download report output  
 Save report parameters for later use  
 Create item record set from report results

Download

8. When you download your results, you will be asked if you want to open or save the file. Select **Save** and give the file a name you'll recognize. When it has finished download, click **Open**.

A message will appear asking you if you want to open the file. Say **Yes**.



9. You will now need to format your Excel spreadsheet to make it more viewer friendly. To make the barcodes display correctly, you must select the entire column the barcodes are in and right click on **Format cells**.

A	B	C	D
CallNumber	Item		Publication Iter
004.023 RIC	3.0		1993
004.678 JOH Parent	3.0		2004
004.678 MIT	3.0		1999
005.133 ALC	3.0		1987
305.906 6 COL	3.0		2000
641.578 4 ROD	3.0		2001
641.865 4 PAP	3.0		2000
658.312 4 LUC	3.0		for supe
917.592 4 ZIB	3.0		1997
917.980 4 ALA	3.0		1981
986.607 4 OHL	3.0		2000
Y 005.4 DUN	3.0		e book o

Select the **Number** category on the lefthand side of the box that appears and change the number of decimal places from 2 to 0.

Number Alignment Font Border Fill Protection

Category:

- General
- Number**
- Currency
- Accounting
- Date
- Time
- Percentage
- Fraction
- Scientific
- Text
- Special
- Custom

Sample  
ItemBarcode

Decimal places: **0**

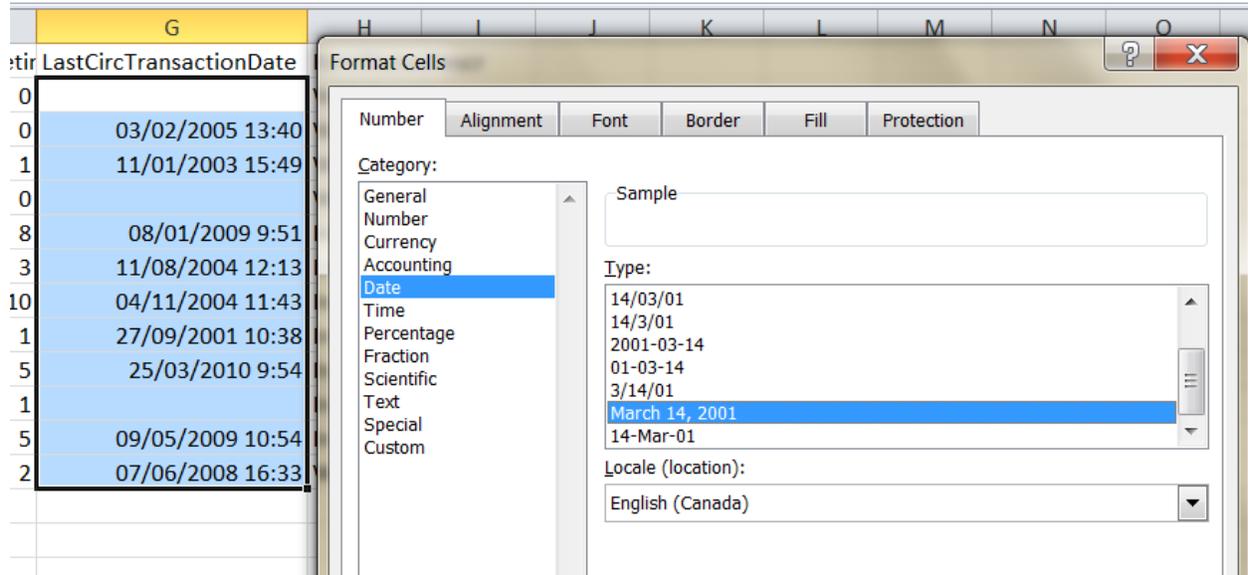
Use 1000 Separator (,)

Negative numbers:

- 1234
- 1234
- 1234
- 1234

If one of the columns displays “#####” simply **expand** the column to view the information.

To make dates appear more recognizable, you must select the entire column the dates are in and right click on **Format Cells**. Select the **Date** category on the lefthand side of the box that appears and choose how you would like the date displayed.



10. Once you are satisfied with your document, do not forget to save. Be sure to save the document as an **Excel Workbook** as sometimes it will default to save it as a “text” file. If it is saved as a text file you will not be able to view the document after.

