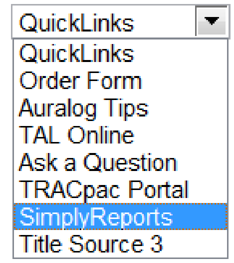
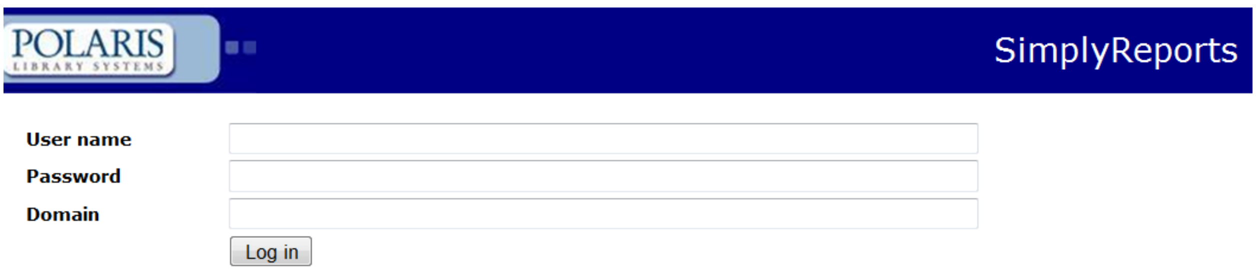
## How to Run a Shelf List Report in SimplyReports

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**.

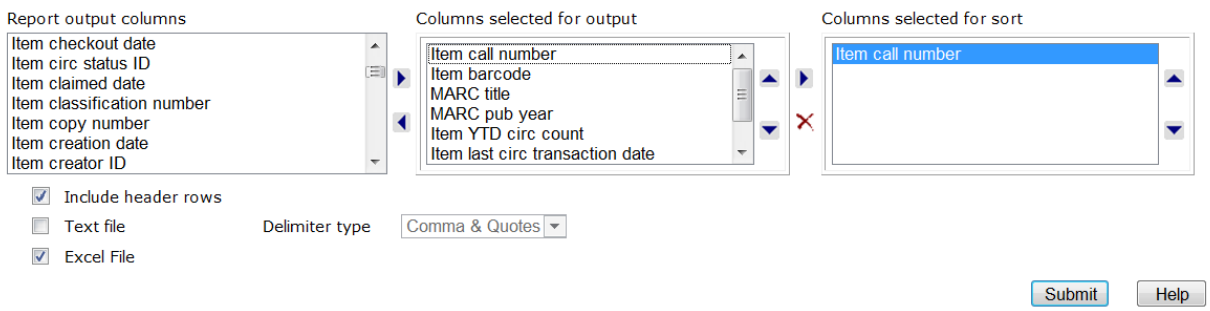



3. The shelf list will be an item report, so click on the Items tab. It automatically defaults to Item list reports, which is what you want.


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

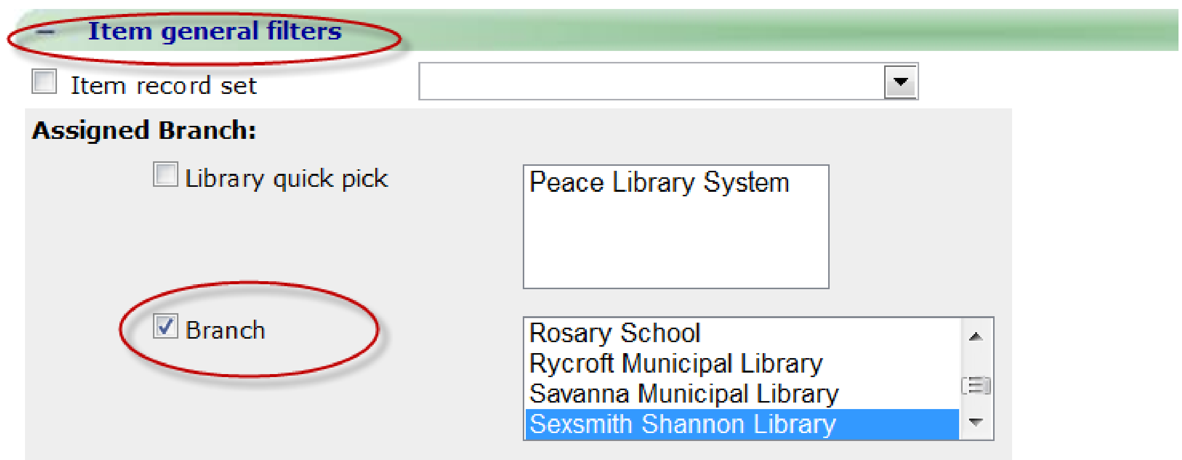
- Item call number
- Item barcode
- MARC title
- MARC pub year
- Item YTD circ count
- Item last circ transaction date
- Item lifetime circ count
- Item circ status description

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.



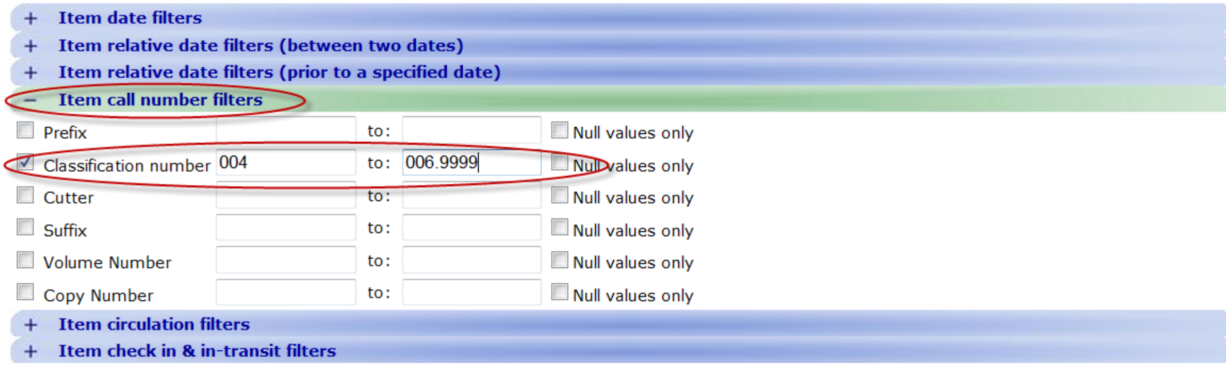

5. Now you must set up filters to ensure that the results are specific for your library and for the call number range you want.

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**.



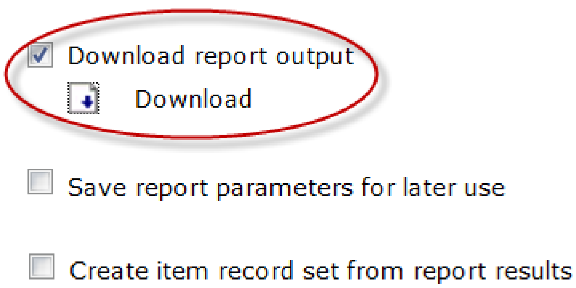


Next, to indicate the call number range you are looking for, from the **Item call number filters** type in the Dewey range you are searching for. Remember to put a checkmark in the **Classification number** box



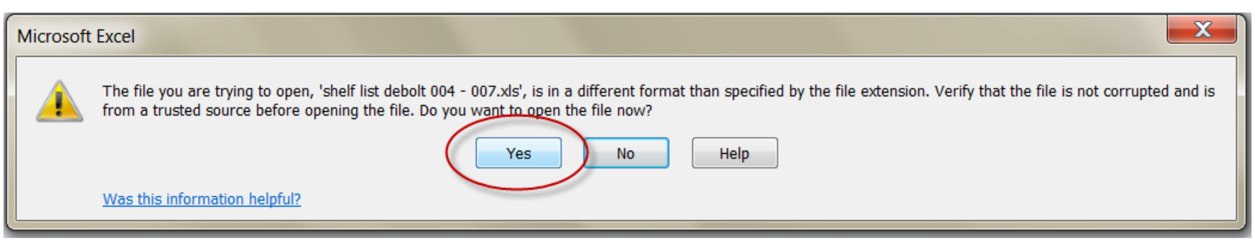

6. Hit submit to run the report

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

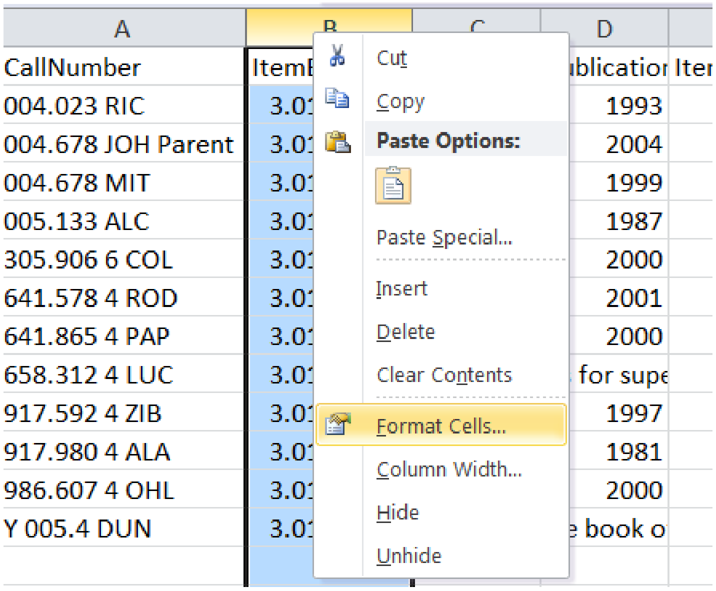



8. When you download your results, you will be asked if you want to open or save the file. Select **Save** and give the file a name you'll recognize. When it has finished download, click **Open**.

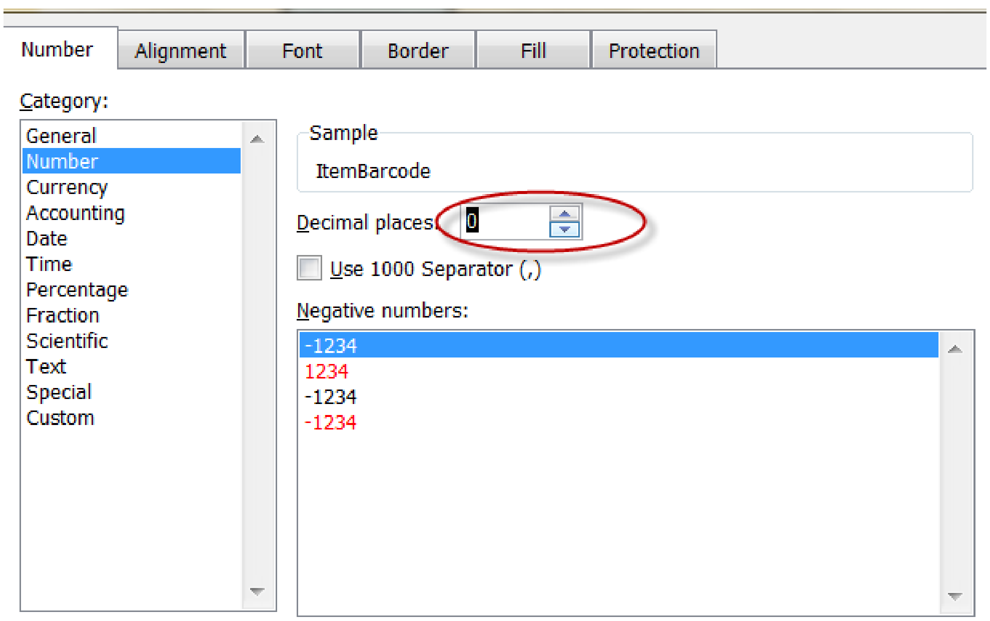
A message will appear asking you if you want to open the file. Say **Yes**.




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**.

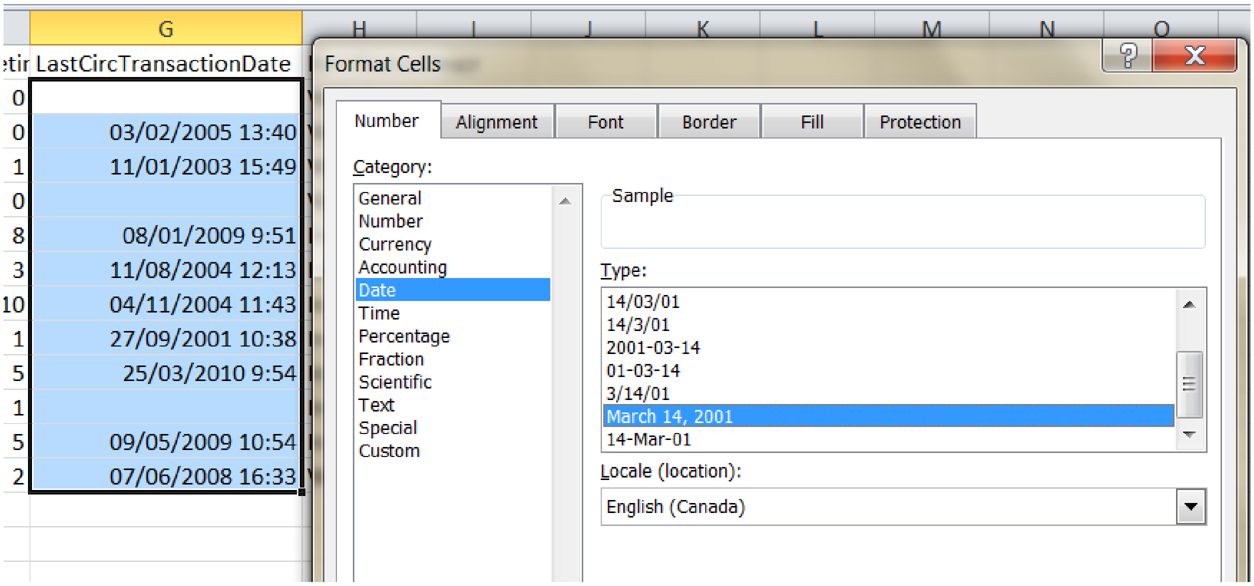



Select the **Number** category on the lefthand side of the box that appears and change the number of decimal places from 2 to 0.




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.