

SimplyReports Quickstart Guide

SimplyReports is a web-based application that extracts data from the Polaris database and allows you to create custom reports about patrons, patron accounts, holds, and items.

Using the interactive forms, over 150,000 different custom reports can be created in the Polaris ILS without knowledge of SQL or database structure. SimplyReports is a user-friendly complement to the reporting options and provides users of all skill levels the ability to access and analyze their Polaris data.

A user may select the specific data elements from drop-down menu combinations, including information about patrons, items, holds and bibliographic records. The user may also select from an extensive set of filters and reporting rules to further refine their report.

SimplyReports also includes the ability to execute or schedule saved reports individually and in groups.

Helpful tip:

*There are two databases that are queried when you use SimplyReports. Statistical reports gather data from the **Transaction database** (historical data). List and Count reports gather data from the **Polaris database** (current data).*

Download the complete [Guide to Simply Reports](#) which contains step by step instructions, explanation of filters and many sample report templates. If you do not have access to SimplyReports or require more information, please contact training@marigold.ab.ca .

Access Simply Reports @ <https://catalogue.tracpac.ab.ca/simplyreports/logon.aspx?op=Default.aspx>

Username: (your regular Polaris username—not case sensitive)
(eg. mAHMstaff)
Password: (your regular Polaris password—case sensitive)
Domain: mlscal OR trac

The following are examples of reports that can be run, including step-by-step procedures. Two are Item reports and one is a Patron report. There is also a section at the end entitled “Helpful tips for formatting your report”.

Items with “On-Order” and “In-Processing” Status

1. Click on the “Items” tab.
2. Click on the “Items list reports” sub-tab.
3. Columns selected for output:
 - MARC author
 - MARC title
 - MARC ISBN
 - Item circ status description
4. Columns selected for sort: MARC author
5. Scroll down the page and click the plus sign beside “Item general filters” to expand the list of filters.
6. Click the “Library quick pick” checkbox, then click on “Marigold”. This will allow you to select your library under “Branch”.

POLARIS LIBRARY SYSTEMS **SimplyReports**

Patron Patron account Holds **Items** Bibs Authorities Serial holdings Funds Saved reports Admin Help

Item list reports Item count reports Item statistical reports Item history reports

Maximum rows to return 999999 Address type to use Notice

Report output columns Columns selected for output Columns selected for sort

Item check out branch name
Item checkout date
Item circ status ID
Item claimed date
Item classification number
Item copy number
Item creation date

MARC author
MARC title
MARC ISBN
Item circ status description

MARC author

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

Export Express:
 MARC file Holdings type No holdings
 MARC file - custom Profile Polaris default - with holdings limit
 Other formats Format Dublin core (XML)

Submit Help

Item general filters

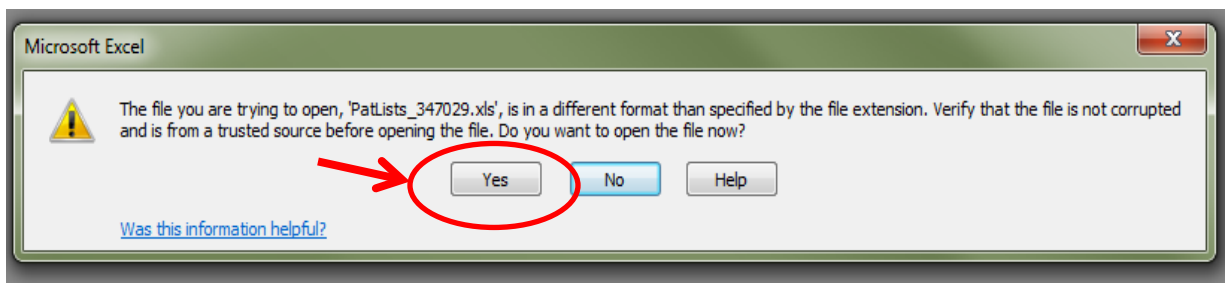
Item record set

Assigned Branch:
 Library quick pick Marigold
Northern Lights
Peace Library System
Yellowhead Region
 Branch Acadia Municipal Library
Acme Municipal Library
Airdrie Public Library
Beiseker Municipal Library

7. Scroll down to the bottom and click the “Circ Status” checkbox.
8. Scroll down in the box to the right and, while holding down the CTRL key, click both “On Order” and “In Processing” to highlight them.
9. Click on the “Submit” button → Report will generate.

The screenshot shows a web-based report generation interface. On the left, there are several filter categories with checkboxes: 'Shelf location', 'Shelving scheme', 'Stat code', and 'Circ status'. The 'Circ status' checkbox is checked. To the right of these categories are dropdown menus. The 'Circ status' dropdown is open, showing a list of options: 'Bindery', 'On-Order', 'Mending', and 'In Processing'. The 'On-Order' and 'In Processing' options are highlighted in blue. Below these filters is a large blue area with a list of filter categories, each preceded by a plus sign: '+ Item date filters', '+ Item relative date filters (between two dates)', '+ Item relative date filters (prior to a specified date)', '+ Item call number filters', '+ Item circulation filters', '+ Item check in & in-transit filters', '+ Item checkbox filters', '+ Item record ID filters', '+ Bibliographic record filters', '+ Patron general filters', '+ Patron date filters', '+ Patron miscellaneous filters', and '+ Patron ID filters'. At the bottom left of the interface is a 'Submit' button. Below the 'Submit' button is a note: '* Item record history transactions do not include data for the current day'.

10. Click on “Download Report Output”.
11. Click on the download icon → This will export the report to Excel.
12. Open the file. (a box will come up saying you are trying to open..... click “yes”)



13. Edit and format the Excel document as desired (See page 6 for helpful tips on formatting your report).

Item History (maximum 95 day window)

1. Click on the “Item” tab.
2. Click on the “Item History Reports” sub-tab.
3. Enter the item’s barcode.
4. Enter the “Start date” and “End date”.

The screenshot displays the Polaris Library Systems SimplyReports interface. The top navigation bar includes tabs for Patron, Patron account, Holds, Items, Bibs, Authorities, Serial holdings, Funds, Saved reports, Admin, and Help. The 'Item history reports' sub-tab is selected. The form contains the following fields and options:

- Item Barcode: 30125000302710
- Start date: 20/02/2012
- End Date: 25/05/2012
- Quick pick: Marigold (Library), Northern Lights (Library), Peace Library System (Library), Yellowhead Region (Library)
- Limit branches: The Regional Automation Consortium (TRAC) (Acadia Municipal Library (Branch), Acme Municipal Library (Branch), Airdrie Public Library (Branch))
- Limit transactions: Add/Modify transactions, Circulation transactions, Financial transactions, Hold transactions
- Show history button

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SimplyReports v. 4.0.473

5. Click on the “Show history” button to generate the report.
6. Click on “Download Report Output”.
7. Click on the download icon to export the report to Excel.
8. Open the file. (a box will come up saying you are trying to open..... click “yes”)
9. Edit and format the Excel document as desired (See page 6 for helpful tips on formatting your report).

Patron count with breakdown by Statistical Class

1. Click on the “Patrons” tab.
2. Click on the “Patron count reports” sub-tab.
3. Columns selected for output:
Patron statistical class description
4. Scroll down and click on the plus sign beside “Patron general filters” to expand the list filters.
5. Check the “Library quick pick” checkbox, then click on “Marigold. This will also automatically select “Branch” and highlight all available Marigold libraries just below → Click on the desired library.

The screenshot shows the POLARIS SimplyReports interface. At the top, there are navigation tabs for various report types, including "Patron count reports". Below the navigation, there are three columns for configuring the report: "Report output columns", "Columns selected for output", and "Columns selected for sort". The "Columns selected for output" column contains "Patron statistical class description". Below these columns are checkboxes for "Include header rows", "Text file", and "Excel File", along with a "Delimiter type" dropdown set to "Comma & Quotes". There are "Submit" and "Help" buttons. The "Patron general filters" section is expanded, showing a "Patron record set" dropdown, a "Patron branch" section with "Library quick pick" and "Branch" checkboxes, and a list of libraries including "Marigold", "Northern Lights", "Peace Library System", and "Yellowhead Region". Below this, there are dropdowns for "Patron code" and "Statistical class", and a "Language" dropdown. At the bottom, there are expandable sections for "Patron date filters", "Patron relative dates filters", and "Patron miscellaneous filters".

6. Click “Submit” to generate the report.
7. Click “Download Report Output”.
8. Click on the download icon to export the report to Excel.
9. Open the file. (a box will come up saying you are trying to open..... click “yes”)
10. Edit and format the Excel document as desired (See page 6 for helpful tips on formatting your report).

Helpful tips for formatting your report

When you export a report from SimplyReports into Excel, it will usually require some formatting so that all of the information displays properly and also to make the report easier to read. The following are the most common elements that you will likely want to format:

- 1) Adjust your columns to an appropriate width to fit the text.

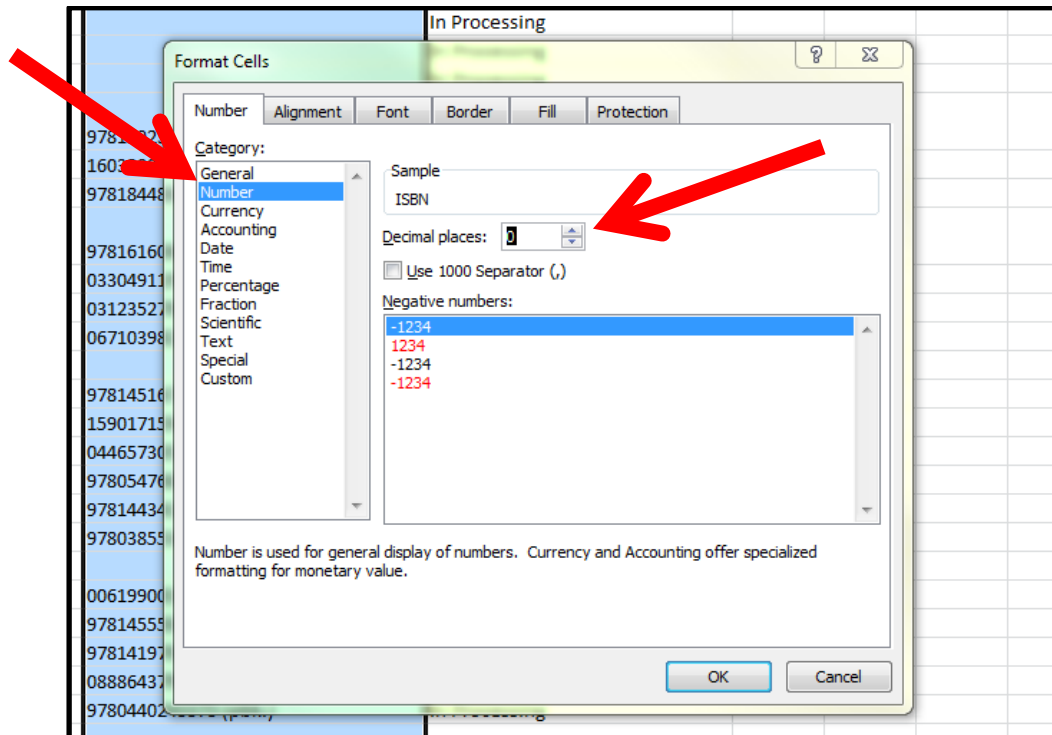
	A	B	C	D	E	F	G	H
1	BrowseAuthor	BrowseTit	ISBN	ItemStatusDescr				
2		Paper crafts (Magazi		In Processing				
3		Christmas ideas (Ma		In Processing				
4		Taste of home holid		In Processing				
5		Crafts 'n things (Mag		In Processing				
6		Canadian house and		In Processing				
7		Canadian 978159237		In Processing				
8		Mayo clin 160320077		In Processing				
9		The Apart 978184488		In Processing				
10	Abedi, Isa Farewell,	978161606		On-Order				
11	Adams, D The hitch-	033049115		In Processing				
12	Andrews, Sequence	03123527C		In Processing				
13	Andrews, Eye of the	067103982		In Processing				
14	Arntson, S The wrap-	9.78E+12		On-Order				
15	Atlee, Ali The typew	978145167		On-Order				
16	Averill, Es The hotel	159017155		On-Order				
17	Baldacci, The forgo 044657305			On-Order				
18	Beck, W. Malcolm a	978054768		On-Order				
19	Bergen, D The age o	978144341		On-Order				
20	Biaggio, M Parlor gan	978038553		On-Order				
21	Blumenth The lifegu	9.78E+12		In Processing				
22	Brown, D Tiger's cla	006199001		On-Order				
23	Brown, Sa Low press	97814555C		On-Order				
24	Buckley, A Kel Gilliga	97814197C		On-Order				

	A	B	C	D	E
1	BrowseAuthor	BrowseTitle	ISBN	ItemStatusDescr	
2		Paper crafts (Magazine).		In Processing	
3		Christmas ideas (Magazine).		In Processing	
4		Taste of home holiday recipe card collection.		In Processing	
5		Crafts 'n things (Magazine).		In Processing	
6		Canadian house and home (Magazine).		In Processing	
7		Canadian almanac & directory = repertoire et	9781592372201 (hardcover, 2008)	In Processing	
8		Mayo clinic family health book	1603200770 (hc.)	In Processing	
9		The Apartment	9781844882861 :	In Processing	
10	Abedi, Isabel, 1967-	Farewell, Grandpa Elephant : a picture book	9781616086558 (hardcover : alk. paper)	On-Order	
11	Adams, Douglas, 1952-2001.	The hitch-hiker's guide to the galaxy	0330491199 (pbk.)	In Processing	
12	Andrews, Lori B., 1952-	Sequence	0312352700 (hc.)	In Processing	
13	Andrews, V. C. (Virginia C.)	Eye of the storm	0671039822 (bound)	In Processing	
14	Arntson, Steven, 1973-	The wrap-up list		9.78055E+12	On-Order
15	Atlee, Alison.	The typewriter girl.	9781451673258 (trade paper) :		On-Order
16	Averill, Esther Holden	The hotel cat	1590171594 (alk. paper)		On-Order
17	Baldacci, David.	The forgotten.	0446573051 : HRD		On-Order
18	Beck, W. H., 1970-	Malcolm at midnight	9780547681009 (hardback)		On-Order
19	Bergen, David.	The age of hope : a novel.	9781443411356 :		On-Order
20	Biaggio, Maryka.	Parlor games : a novel.	9780385536226 :		On-Order
21	Blumenthal, Deborah.	The lifeguard		9.78081E+12	In Processing
22	Brown, Dale.	Tiger's claw : a novel.	0061990019 : HRD		On-Order
23	Brown, Sandra.	Low pressure.	9781455501557 :		On-Order
24	Buckley, Michael, 1969-	Kel Gilligan : semiprofessional daredevil	9781419703799 (alk. paper)		On-Order
25	Butler, John, 1947-	Zucchini : you can never have enough	0888643799 (pbk.)		In Processing
26	Butler, Rachel.	Scorched	9780440243373 (pbk.)		In Processing
27	Canadian Living Test Kitchen.	Canadian Living: 150 essential whole grain re	9780987747426 (trade paper) :		On-Order
28	Carter, Philip.	Untitled novel.	9781439199428 :		On-Order
29	Cast, P. C.	Goddess of the rose	9780425227107 (pbk.)		In Processing
30	Chabon, Michael.	Telegraph Avenue : a novel.	9781554682072 :		On-Order
31	Chen, Justina.	Return to me		9.78032E+12	On-Order
32	Child, Lee.	A wanted man : a Jack Reacher novel.	9780385344333 :		On-Order
33	Chiofalo, Rosanna.	Bella fortuna.	9780758266538 : (trade paper) :		On-Order
34	Connelly, Michael.	The black box.	0316069434 : HRD		On-Order
35	Connolly, John, 1968-	Every dead thing	067102731X (pbk.)		In Processing
36	Cook, Robin.	Nano.	9780399160820 :		On-Order
37	Cornwell, Patricia.	The bone bed : a Scarpetta novel.	9780399157561 :		On-Order

2) All barcodes will need to be properly formatted to display correctly.

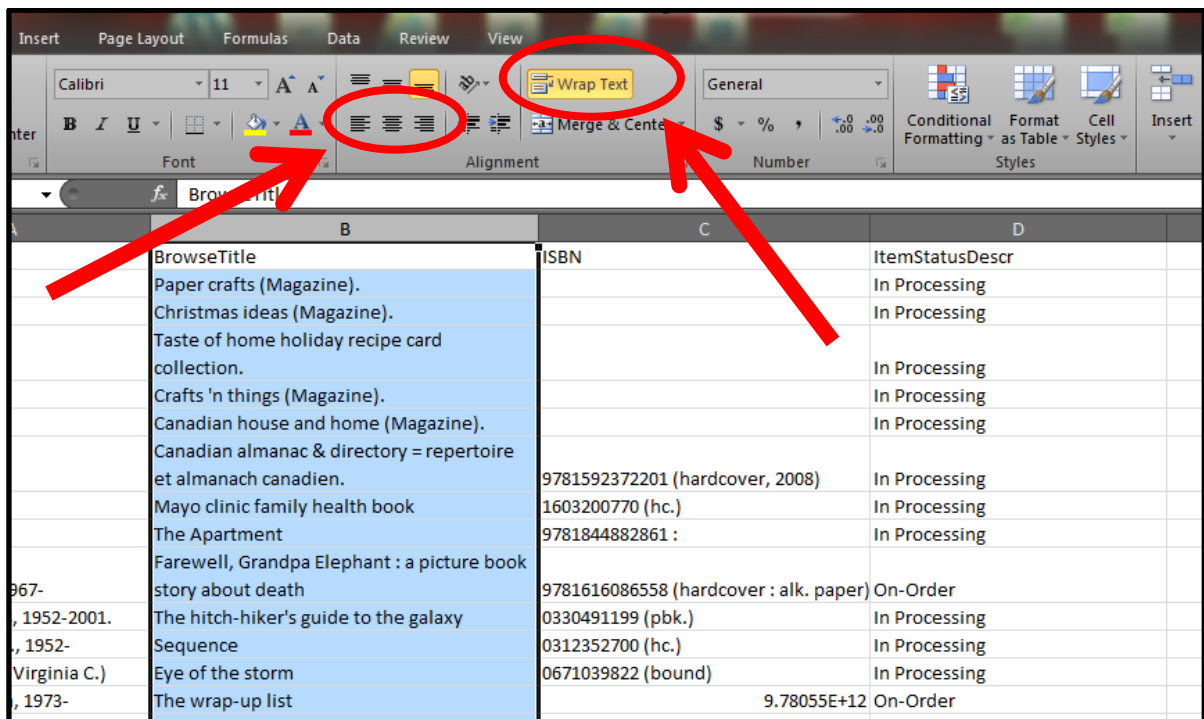
C	D	E	F	G	H
ISBN	ItemStatusDescr				
	In Processing				
	In Processing				
	In Processing				
	In Processing				
	In Processing				
9781592372201 (hardcover, 2008)	In Processing				
1603200770 (hc.)	In Processing				
9781844882861 :	In Processing				
9781616086558 (hardcover : alk. paper)	On-Order				
0330491199 (pbk.)	In Processing				
0312352700 (hc.)	In Processing				
0671039822 (bound)	In Processing				
9.78055E+12	On-Order				
9781451673258 (trade paper) :	On-Order				
1590171594 (alk. paper)	On-Order				
0446573051 : HRD	On-Order				
9780547681009 (hardback)	On-Order				
9781443411356 :	On-Order				
9780385536226 :	On-Order				
9.78081E+12	In Processing				
0061990019 : HRD	On-Order				
9781455501557 :	On-Order				

Highlight the columns or cells desired, right-click, and select "Format Cells".



3) Format columns if desired:

- You may want to format the text so that it “wraps” and displays the entire cell contents and allows for a narrower column width (for titles)
- You may also want to “justify” the text either right, left or center




4) Format column headings (row 1 usually)

5) Add borders (all borders)

Click to add header

Author	Title	ISBN	Status
	Paper crafts (Magazine).		In Processing
	Christmas ideas (Magazine).		In Processing
	Taste of home holiday recipe card collection.		In Processing
	Crafts 'n things (Magazine).		In Processing
	Canadian house and home (Magazine).		In Processing
	Canadian almanac & directory = repertoire et almanach canadien.	9781592372201 (hardcover, 2008)	In Processing
	Mayo clinic family health book	1603200770 (hc.)	In Processing
	The Apartment	9781844882861 :	In Processing
Abedi, Isabel, 1967-	Farewell, Grandpa Elephant : a picture book story about death	9781616086558 (hardcover : alk. paper)	On-Order
Adams, Douglas, 1952-2001.	The hitch-hiker's guide to the galaxy	0330491199 (pbk.)	In Processing
Andrews, Lori B., 1952-	Sequence	0312352700 (hc.)	In Processing
Andrews, V. C. (Virginia C.)	Eye of the storm	0671039822 (bound)	In Processing
Arntson, Steven, 1973-	The wrap-up list	9780547824109	On-Order
Atlee, Alison.	The typewriter girl.	9781451673258 (trade paper) :	On-Order
Averill, Esther Holden	The hotel cat	1590171594 (alk. paper)	On-Order
Baldacci, David.	The forgotten.	0446573051 : HRD	On-Order
Beck, W. H., 1970-	Malcolm at midnight	9780547681009 (hardback)	On-Order
Bergen, David.	The age of hope : a novel.	9781443411356 :	On-Order
Biaggio, Manika	Parlor games : a novel	9780385536226 :	On-Order

You can access more help with using Excel in several ways. With the program open, do one of the following:

- ❖ Click on the  icon in the top right corner or hit "F1" on your keyboard.
- OR
- ❖ Go to "File" → "Help" and either click on "Microsoft Office Help" or for more online help, click "Getting Started" then select "Excel".