

Creating and Saving Reports using SimplyReports

Use SimplyReports to create shelf lists of items by collection in your branch for weeding. SimplyReports offers multiple ways to filter your report: by circulation date, low overall circulation, and within specific call number ranges. SimplyReports offers the flexibility of being able to save your list as an excel spreadsheet and a Record Set in Polaris. Saving weeding lists as Record Sets saves staff time by making it easy to mark items missing or withdrawn. You may also save reports to run again at a later date.

Logging In:

1. Go to the URL:
<http://glstplweb001/simplyreports/logon.aspx?op=Default.aspx>
2. Log in with your Polaris username and password.
3. The Domain is: bplprivate.

Creating the Report:

1. **Select the Main tab** (Items, Funds).
 - a. For example: **Select the Items** tab to create collection maintenance reports



2. **Select the Subtab** (Item List Reports, Serials Count Reports)
 - a. For example: **Select Item list reports** for collection maintenance.



3. **Select your Report output columns** and click the right arrow to move them into the **Columns selected for output** list.
 - a. To reorder the columns selected, use the up and down arrow keys.
 - b. To sort items in the column, select the columns to sort and using the right arrow to move them into the Columns selected for sort list.
 - i. The columns will be listed in the order they appear in the Columns selected for Output list.
 - ii. The columns will be sorted in the order in which they appear in the Columns selected for sort list.



4. Select the **filters** you want to apply to this report.
 - a. Some filters have a selection called **Not present**. When you select this filter option, it limits the report output to records without this data. For example, if the filter is Last checkout or renewal date under Item Date Filters, and you select **Not present**, the filter will include records that have never circulated.
 - b. More **information** about **filters** can be found in the **SimplyReports manual**.



5. Click **Submit** to run your report.
6. The **Preview** window will appear in a separate tab and displays the first 1,000 rows and the total count of all rows in the report.
 - a. If the report output is not what you expected, close the preview window and change your output columns and filters. You can edit and preview as many times as you want prior to downloading or saving.

Downloading the Report:

1. Place a **checkmark** in the box next to **Download report output**, and then **click** on the **download icon**.

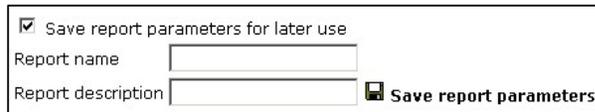


Download report output
 Download

2. If you see an excel pop up box, click **Yes** to download the report.
3. Your report will open in Excel.
 - a. Barcodes do not display properly in Excel format. To correct this display problem, select the column header, right click and select Format cells. Highlight Number under Category, select or type 0 in the Decimal place box and click OK. You may need to increase the size of the column to display the barcode.

Saving report parameters for later use:

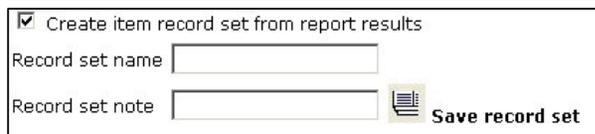
1. Place a **checkmark** in the box next to **Save report parameters** for later use.
2. Enter a report name and description.
3. **Click** on the **Save report parameters icon**.



Save report parameters for later use
Report name
Report description  Save report parameters

Creating item record set from report results

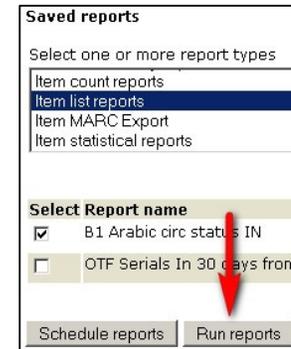
1. Place a **checkmark** in the box next to **Create item record set from report results**.
2. Enter a record set name using proper record set naming protocols. You may also enter a record set note.
3. **Click** on the **Save record set icon**.



Create item record set from report results
Record set name
Record set note  Save record set

Running your saved reports:

1. **Log in** to SimplyReports.
2. **Select** the **My Reports** main tab.
3. **Select** the correct **report type** from the scroll down menu
 - a. For example: If you saved an item list report; scroll down and select item list report.
4. Place a checkmark in the box next to the report you want to run.
5. Click on run report.



Saved reports
Select one or more report types
Item count reports
Item list reports
Item MARC Export
Item statistical reports

Select Report name
 B1 Arabic circ status IN
 OTF Serials In 30 days from

Schedule reports Run reports

Editing/Deleting your saved reports:

1. **Log in** to SimplyReports.
2. **Select** the **My Reports** main tab.
3. **Select** the correct **report type** from the scroll down menu
 - a. For example: If you saved an item list report; scroll down and select item list report.
4. **Identify** the report you want to edit/delete.
5. **Click** on **edit** report to make changes.
 - a. You will only be able to edit output columns in most instances.
6. **Click** on **delete** report to delete the item.



Saved reports
Select one or more report types
Item count reports
Item list reports
Item MARC Export
Item statistical reports
Help

Select Report name Report description Creation date Last run date Creator Report type Actions
 B1 Arabic circ status IN 01/09/2014 01/09/2014 ekirsch Item list reports Delete Edit