

## Using reports in Polaris & SimplyReports to do catalog cleanup & make acquisitions decisions (ODIN Virtual Work Day Session 2-8-21)

SimplyReports URL : <https://polaris.odinlibrary.org/simplyreports/logon.aspx>

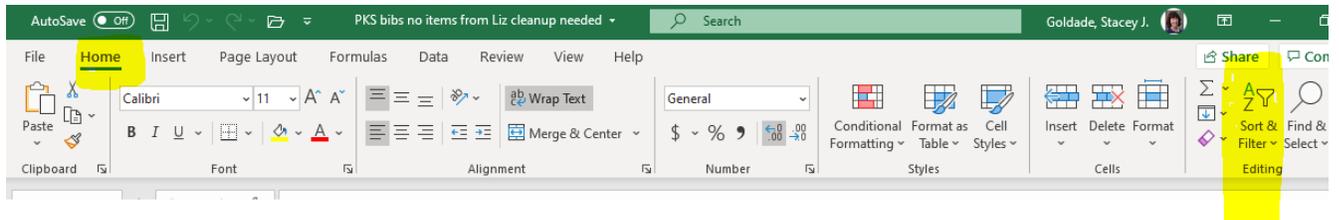
Get assistance from the ODIN office if your logon isn't working in SimplyReports.

If you're exporting from SimplyReports to Excel, the browser can affect how that export happens. I've found that Firefox works the best for me, so experiment with different browsers to find what works best for you.

### Tips for ordering reports in SimplyReports

- May want to limit to "record status" of "Final", or "Final" and "Provisional". You probably don't want to waste time looking at bibs or items that are marked as "Deleted". Until Polaris is purged of all things marked "Deleted", you should keep this in mind.
- Once you get the report into Excel, it's easy to sort things A-Z or smallest to largest. In the Home tab of Excel, find the "Editing" section and choose "sort and filter" and then "filter". Then, look for the small arrows in the column headings of your spreadsheet and select "Sort A to Z" or other sort methods to sort on that column. Things that are clearly wrong, like barcodes that are too short or too long, sort to the top and bottom and are easy to identify this way.

The Home tab and Filter area of Excel, both shown in yellow.



After the filter option is turned on, you should see these arrows in each column header area that are in red. Below, "Sort A to Z" is in yellow.

ItemBarcode	AssociatedBib	CollectionName	CallNumber	ItemSta	ItemStatusDate	BrowseTitle
33154000070322	149009	A Z ↓ Sort A to Z		Lost	1/9/2020 8:41	The three pigs
33154000099362	248270	Z A ↓ Sort Z to A		Lost	5/6/2020 13:14	Where the wild things are.
33154000259222	133472	Sort by Color >		Lost	1/9/2020 8:44	The rainbow fish
33154000083697	311436	Sheet View >		Lost	1/9/2020 8:41	Little Poss and Horrible Hound
33154000078473	311938	Clear Filter From "CallNumber"		Lost	2/18/2020 9:32	The black stallion mystery
33154000038196	292413			Lost	5/6/2020 12:23	The Visual dictionary of the human body.

Contact info: Stacey Goldade [sgoldade@nd.gov](mailto:sgoldade@nd.gov)