

Checking your data with Simply Reports

It can be helpful to check your data. Through the years, library standards have changed, our libraries have gone through migrations, and sometimes mistakes slip in. This session is to help find data you might want to change to make your data better.

These are simple examples of the kinds of reports you can do with Simply Reports. Hopefully the examples will provoke ideas for reports that will be useful for your library.

Count reports

Count reports give an overview of different data categories.

Item count reports

First, try one column, Item assigned collection name in the Columns selected for output box. Under the filters select your branch and record status Final.

The screenshot shows the 'Simply Reports' interface. At the top, there is a navigation bar with tabs for 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', 'Serials', 'Funds', 'Invoices', 'Orders', and 'My Reports'. Below this, there are sub-tabs for 'Item list reports', 'Item count reports', and 'Item statistical reports'. The main area is divided into three columns: 'Report output columns', 'Columns selected for output', and 'Columns selected for sort'. The 'Report output columns' list includes 'Item assigned branch abbreviation', 'Item assigned branch name', 'Item assigned collection abbreviation', 'Item call number', 'Item call number prefix', 'Item call number suffix', and 'Item check in branch abbreviation'. The 'Columns selected for output' box contains 'Item assigned collection name'. The 'Columns selected for sort' box is empty. Below these columns are checkboxes for 'Include header rows' (checked), 'Text file' (unchecked), and 'Excel file' (checked). A 'Delimiter type' dropdown is set to 'Comma & Quotes'. A 'Submit' button is located at the bottom right. Below the configuration area is a section for 'Item general filters'. The 'Assigned branch:' filter is expanded, showing a list of branches: 'Northwood City', 'Northwood School', 'ODIN Office' (highlighted), 'Sanford', and 'Stanley'. The 'Branch' checkbox is checked.

Close window

Download report output

Save report parameters for later use

There were 7 results, to download the report use the checkbox (above).

CollectionName	NumberOfItems
Biography	32
High School Fiction	30
High School Nonfiction	26
DVD	12
Large Print	8
Audiobook	7
	3

This will give you an overview of your library's collections. If there are any collections that are empty, you may want to have them removed from your library.

Next, add Item circ status to the Columns selected for output, and add Item assigned collection name to the Columns selected for sort.

The screenshot shows the 'SimplyReports' interface with the following configuration:

- Report output columns:** Includes 'Item assigned collection name' and 'Item circ status' in the 'Columns selected for output' list.
- Columns selected for sort:** Includes 'Item assigned collection name' in the 'Columns selected for sort' list.
- Output options:** 'Include header rows' and 'Excel file' are checked. 'Text file' is unchecked. The 'Delimiter type' is set to 'Comma & Quotes'.
- Item general filters:** 'Item record set' is set to a dropdown menu. Under 'Assigned branch', 'Library quick pick' and 'Branch' are checked. The 'Library quick pick' dropdown shows 'Northwood City', 'Northwood School', 'ODIN Office', 'Sanford', and 'Stanley'. The 'Branch' dropdown shows 'ODIN Office'.

The search results for this shows a column for circulation status (ItemStatusDescr) with a count for each.

Close window

Download report output

Save report parameters for later use

There were 23 results, to download the report use the checkbox (above).

CollectionName	ItemStatusDescr	NumberOfItems
	Loaned	3
Audiobook	Available	3
Audiobook	Loaned	2
Audiobook	In-Repair	1
Audiobook	Missing	1
Biography	Loaned	15
Biography	Available	15
Biography	Missing	1
Biography	Lost	1
DVD	Available	8
DVD	Loaned	4
High School Fiction	Loaned	14
High School Fiction	Available	12
High School Fiction	Lost	1
High School Fiction	Missing	1
High School Fiction	Bindery	1
High School Fiction	Withdrawn	1
High School Nonfiction	Available	17
High School Nonfiction	Loaned	5
High School Nonfiction	On Hold	3
High School Nonfiction	In-Repair	1
Large Print	Available	6
Large Print	Loaned	2

Next, remove Item circ status, and add Item Material Type.

Report output columns

- Item assigned collection name
- Item loan period code
- Item lost date
- Item modifier name
- Item non public note
- Item number of days delayed
- Item owning organization abbreviation
- Item owning organization name

Include header rows

Text file Delimiter type Comma & Quotes ▾

Excel file

Submit

Item general filters

Item record set ▾

Assigned branch:

Library quick pick ▾

Branch ▾

Material Type is important because it determines loan limits. So, material type can be an important one to keep an eye on.

Close window

Download report output

Save report parameters for later use

There were 12 results, to download the report use the checkbox (above).

CollectionName	MaterialTypeDescription	NumberOfItems
	Book	3
Audiobook	CD - Audiobook	6
Audiobook	Read-Along	1
Biography	Book	32
DVD	DVD	9
DVD	Book	2
DVD	Large Print	1
High School Fiction	Book	25
High School Fiction	DVD	3
High School Fiction	Large Print	2
High School Nonfiction	Book	26
Large Print	Large Print	8

Patron count reports

On the patron tab select the Patron count reports subtab. For this example, we will add patron block to the Columns selected for output. Under the filters select your branch.

The screenshot shows the Polaris SimplyReports interface. The top navigation bar includes 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', and 'Serials'. The 'Patron count reports' subtab is selected. The 'Report output columns' section lists various attributes, with 'Patron block' selected for output. The 'Columns selected for output' section shows 'Patron block' in a list. The 'Patron general filters' section includes a 'Patron record set' dropdown and a 'Patron branch' section with 'Library quick pick' and 'Branch' checkboxes, and a dropdown menu showing 'ODIN Office' selected.

- Download report output
- Save report parameters for later use

There were 5 results, to download the report use the checkbox (above).

PatronBlock	NumberOfPatrons
	19
Address Check Required	1
Registration Has Expired	1
Verify Address	1
Verify Phone Number	1

This gives an overview of the patron blocks for the library.

Count reports have output columns that create sums. The next report uses one of these columns.

For the report select Patron city and select Sum Patron lost item count. Sort by Patron city.

The screenshot shows the 'SimplyReports' interface. The 'Patron count reports' tab is active. The configuration is as follows:

- Report output columns:** Sum patron lost item count
- Columns selected for output:** Patron city, Sum patron lost item count
- Columns selected for sort:** Patron city
- Options:**
 - Include header rows
 - Text file
 - Delimiter type: Comma & Quotes
 - Excel file
- Submit** button
- Patron general filters:**
 - Patron record set: [dropdown]
 - Patron branch:
 - Library quick pick: Northwood City, Northwood School, ODIN Office, Sanford, Stanley
 - Branch: ODIN Office

- Download report output
- Save report parameters for later use

There were 8 results, to download the report use the checkbox (above).

City	TotalLostItemCount	NumberOfPatrons
	1	4
BOSTON	0	1
CHEYENNE	0	1
DICKINSON	0	1
FARGO	0	1
GRAND FORKS	0	1
LOS ANGELES	0	1
NAPOLEON	4	13

The next report example, select Patron postal code and Sum patron ytd circ count.

Download report output
 Save report parameters for later use

There were 8 results, to download the report use the checkbox (above).

PostalCode	TotalPatronYTD CircCount	NumberOfPatrons
	11	4
02116	3	1
58102	0	1
58203	0	1
58561	38	13
58601	0	1
82001	3	1
90010	5	1

Outstanding balance count report

Select the Patron Account tab and select the Patron account count reports subtab. This looks a little different than the other tabs because it has options that you can select in combination with a sum column.

For this example, select Patron name and Sum balance for the columns selected for output. Leave the Outstanding charges selected as well. Select your branch as the transacting branch.

Patrons Patron Account Holds Items Bibs Authorities Serials Funds Invoices Orders My Reports Admin

Patron account list reports Patron account count reports Patron account statistical reports

Report output columns

- Patron ID
- Patron legal full name
- Patron postal code
- Patron statistical class
- Sum item price
- Sum transaction amount (history only)
- Use patron legal name on print/phone notices

Columns selected for output

- Patron full name
- Sum balance (outstanding balance only)

Columns selected for sort

Include header rows
 Text file
 Excel file

Delimiter type: Comma & Quotes

Submit

Outstanding balance options:
 The options below may be used with 'Sum balance' column from above

- Outstanding charges
- Outstanding credits
- Outstanding deposits

History options:
 The options below may be used with 'Sum transaction amount' column from above

- Payment history
- Refund history
- Forfeit from deposit history
- Return from deposit history
- Waive existing charge history
- Waive history
- Auto-waive history
- All waive history

Patron account general filters

Reason (or fee reason)

- None given
- Borrow By Mail Charge
- Check Out Charge
- Collection Agency

Method

- None given
- Cash
- Check
- Collection Agency

Transacting branch:

Library quick pick

- Northwood City
- Northwood School
- ODIN Office
- Sanford
- Stanley

Branch

- ODIN Office

Download report output

Save report parameters for later use

There were 5 results, to download the report use the checkbox (above).

PatronFullName	BalanceTotal	NumberOfTransactions	NumberOfPatrons
Bryson, Bill	30.00	2	1
Rooney, Sally	32.00	2	1
Schwab, V. E.	55.00	2	1
TESTER, LYNN	85.20	6	1
Weir, Andy	40.00	1	1

The result of this report gives us columns for patron name, balance, number of transactions, and number of patrons.

A library may want to filter this by a relative transaction date for patrons with outstanding balances over 60 days old:

+ Patron account miscellaneous filters

- Transaction date filters

Transaction date

Transaction date between

Transaction date

60 Days before the report run date

Checking records with list reports

One way of checking data with list reports is to add lots of columns to the report with lots of data, then use filters and sorting to find anomalies in the data.

Patron list report

Select the Patrons tab and the patron list reports subtab.

Columns

- Patron ID
- Patron statistical class
- Patron code
- Patron full name
- Patron birth date
- Patron street address
- Patron city
- Patron state
- Patron postal code
- Patron exclude from bills
- Patron exclude from holds
- Patron exclude from overdues
- Patron expiration date
- Patron block
- Patron blocking note

Filter

- Branch

Here's the report:

Download report output

Save report parameters for later use

Create patron record set from report results now

There were 23 results, to download the report use the checkbox (above).

PatronID	StatDescr	PatronCodeDescr	PatronFullName	Birthdate	StreetAddress	City	State	PostalCo
165344	Adult	Student - Elementary	Alderton, Dolly	8/31/1988 12:00:00 AM	4567 High Street	NAPOLEON	ND	58561
165354	Adult	Student - High School	Box, C. J.	11/9/1958 12:00:00 AM	100 Main Street	CHEYENNE	WY	82001
165349	Student	Student - Elementary	Bryson, Bill	12/8/1951 12:00:00 AM	3221 State Street	NAPOLEON	ND	58561

Click the icon to download the report to your computer. For this presentation I'm going to use Google sheets instead of Excel since not all libraries have access to Microsoft Office applications.

Log in to your Google drive. If you don't have one, you can create an account with your email account.

You can import files into your Google Drive, by clicking on the New button, or dragging a file into the drive.

Double click the file to open it. When you try to edit the file, you will get a pop-up message that says, "This file needs to be saved as .xlsx, click Ok. Now you can make edits to the file.

PatronID	Stat Class	Patron Code	Name	Birthdate	City	State	PostalCod	Exclude From	Exclude From	Exclude From	Expiration	Patron Block	Blocking Notes
155048	Adult	Student - Element	MasonTest, Timothy					No	No	No	5/27/2038		
165354	Adult	Student - High Sci	Box, C. J.	11/9/1958	CHEYENNE	WY	82001	No	No	No	3/9/2039		Umbrella is at the circ desk.
165355	Adult	Student - High Sci	Kuang, R. F.	5/29/1996	BOSTON	MA	2116	No	No	No	3/9/2039	Verify Address	
165356	Adult	Student - Element	Everett, Perci	12/22/1956	LOS ANGELE	CA	90010	No	No	No	3/9/2039		
165357	Adult	Student - Element	Rose, Jeneva	4/6/2000	NAPOLEON	ND	58561	No	No	No	3/9/2039		
165344	Adult	Student - Element	Alderton, Doll	8/31/1988	NAPOLEON	ND	58561	Yes	Yes	Yes	3/6/2039		
165350	Child	Education	Kerouac, Jack		NAPOLEON	ND	58561	No	No	No	3/6/2039		
165346	Faculty-Staff	Staff	Noah, Trevor		NAPOLEON	ND	58561	No	No	No	3/6/2039		
165347	Faculty-Staff	Staff	Clear, James	1/22/1986				No	No	No	3/6/2039	Address Check Required	
165348	Faculty-Staff	Staff	Fonda, Lee	3/10/1979	NAPOLEON	ND	58561	Yes	Yes	Yes	3/9/2026		
155481	Faculty-Staff	Community	Stockdill, Tina Test		FARGO	ND	58102	No	No	No	6/3/2035		
155516	Student	Community	Tester2, Nicole		DICKINSON	ND	58601	No	No	No	6/3/2038		
165342	Student	Student - Element	Rooney, Sally					Yes	Yes	Yes	3/6/2039		
165343	Student	Student - Element	Leilani, Raver	8/26/1990	NAPOLEON	ND	58561	Yes	Yes	Yes	3/6/2039	Verify Phone Number	
124454	Student	Student - Element	Millette, Zoey	12/24/2019	NAPOLEON	ND	58561	No	No	No	1/30/2033		
146252	Student	Student - Element	TESTER, LYN	11/30/2006	NAPOLEON	ND	58561	No	No	No	12/31/2032		
165349	Student	Student - Element	Bryson, Bill	12/8/1951	NAPOLEON	ND	58561	No	No	No	3/6/2039		Must return books before checking out any more.

Use filters and sorting to find errors in data.

Create a new sheet by selecting the File menu, and selecting New, and spreadsheet. Paste the patron IDs for records you want to bulk change into the new sheet.

PatronID
155048
165354
165355
165356
165357
165344

In Polaris Leap, click on the New menu and select Record Set. Choose the Record Type: Patron. Give the record set a name, click the More menu, select Add from File, and import the spreadsheet. Click Add from File.

Select File

File Name

Patron record update Patron Code - Sheet1.csv SELECT FILE ...

Error Report Name

AddFromFile_ErrorReport_20260316103448.txt

ADD FROM FILE
CANCEL

After the patron records appear in the set, save the set.

Click the Actions menu and select Bulk Change. Select the patron registered branch and select the Patron Code Community. Click Update Patrons.

Patron Bulk Change

UPDATE PATRONS
CANCEL

OWD Patron update patron code

ODINMASON

Error Record Set

Name **Owner**

[Profile](#)
[Attributes](#)
[Address](#)
[Preferences](#)
[Blocks and Notes](#)

Registered Branch **Patron Code**

Statistical Class **Gender**

Expiration Date **Date of Registration**

You can monitor the progress of a bulk change and view a report from the Background Processing page. Click on the Utilities menu then select Background processing. Select the Patron Bulk Change tab.

Background Processing

REFRESH
CLOSE

[Bibliographic Bulk Change](#)
[Bulk Waive Fines](#)
[Item Bulk Change](#)
[MARC Import](#)
Patron Bulk Change
[Patron Import](#)

Filter by Column
Filter

	RECORD SET NAME	RECORD SET OWNER	TOTAL RECORDS	STATUS	STARTED	ENDED
<input type="checkbox"/>	OWD Patron update patron code	ODINMASON	2	Succeeded	3/16/2026 10:40:14 AM	3/16/2026 10:40:16 AM

Click on the record set name to open the report. Error details, if any, will appear at the bottom of the report.

```
PATRON BULK CHANGE
3/16/2026 10:40:16 AM
Status at completion: Completed successfully.
*****
GENERAL INFORMATION:
Polaris user name: ODINMASON
Processed record set name: OWD Patron update patron code
Processed record set owner: ODINMASON
Error record set name:
Error record set owner:
*****
SUMMARY OF CHANGES:
Registered branch: ODIN Office (br)
Patron code: Community
*****
STATISTICS:
Processing time: 0 hours 0 minutes 1 seconds
Number of records in record set: 2
Number of records with all changes made: 2
Number of records with errors: 0
Number of records unchanged due to 'lack of permission' error: 0
*****
ERROR DETAILS:
*****
```

Item List Report

Columns for report

- Item assigned collection name
- Item barcode
- Item call number prefix
- Item classification number
- Item cutter number
- Item call number suffix
- Item volume number
- Item shelving scheme
- Item fine code
- Item loan period code
- Item material type
- Item price
- MARC title

Column selected for sort: Item assigned collection name

Filters for report

Item general filters:

- Branch
- Record status: Final
- Filter by collection if your report is too big

Import the report into Google sheets.

Collection	Barcode	Prefix	Class	Cutter	Suffix	Volume	Shelving	Fine Code	Loan Period	Material Type	Price	Title
High School Nonfiction	33150000027	FIC		426	W		Dewey Decim	No Fine	1 Day	Book		The compl
High School Nonfiction	33150000000			641.5	KETO		Dewey Decim	\$.05 / \$100.0	1 Day	Book	\$25.00	The essen
High School Fiction	3631000002	FIC	LAM			v.1	Other	\$.10 / \$25.00	21 Days	Book	\$15.99	The collec
High School Fiction	3631000003	FIC	LAM			v.2	Other	No Fine	21 Days	Book	\$15.99	The collec
High School Fiction	36310000303	FIC	LAM			v.3	Other	\$.10 / \$25.00	21 Days	Book	\$15.99	The collec
High School Fiction	36310000340	FIC	LAM			v.4	Other	No Fine	21 Days	Book	\$15.99	The collec
High School Fiction	33152052648		J FIC				Dewey Decim	\$.05 / \$100.0	21 Days	Book		Harry Pott

Use the filtering and sorting functions to find any problems with the data.

Create a new sheet and download it to your computer.

Barcode
33150000000
33152052648
332601548
33150000048
33150000026
332620152
3631000002
36310000303
33154852698

Use the downloaded sheet to create an item record set and do a bulk change to update the data. See the steps in the Patron List section.

Simply Reports

When you create a report that you find useful, you can save it and rerun it again in the future. On the report page, check the box "Save report parameters for later use" and give the report a descriptive name. Click Save report parameters.


Download report output

Save report parameters for later use

Report name

Report description

Record set name

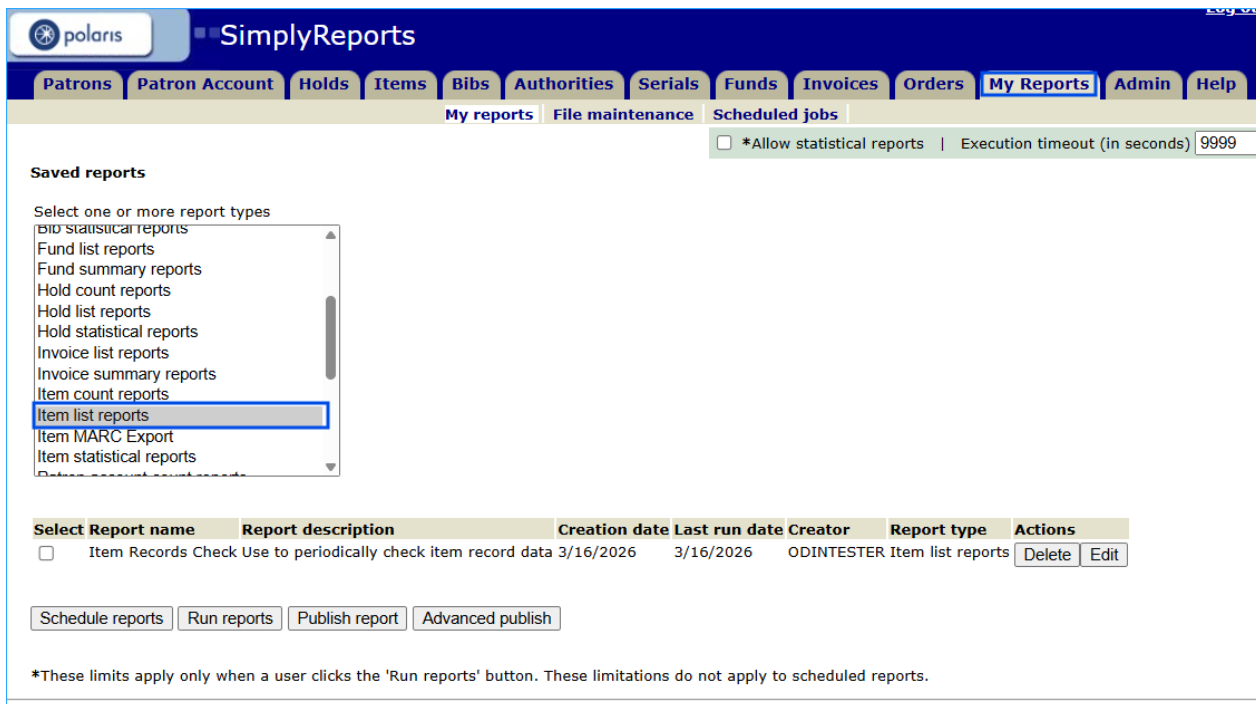
Record set note  Save report parameters

Create item record set from report results now

There were 114 results, to download the report use the checkbox (above).

CollectionName	ItemBarcode	CallNumberPrefix	ClassificationNumber	CutterNu
High School Nonfiction	33150000026777		398.2	BLA
Biography	3315888222	FIC	SHACKLETON	

To run this report again, click on the My Reports tab in Simply Reports. In the list, select the type of report that is saved. A list of reports for that type will appear.



The screenshot shows the 'Simply Reports' interface. At the top, there is a navigation bar with tabs for Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports (selected), Admin, and Help. Below this is a sub-navigation bar with 'My reports', 'File maintenance', and 'Scheduled jobs'. A checkbox for '*Allow statistical reports' is checked, and the 'Execution timeout (in seconds)' is set to 9999.

Under 'Saved reports', there is a dropdown menu titled 'Select one or more report types' with the following options:

- Item list reports (highlighted)
- Item count reports
- Item MARC Export
- Item statistical reports
- Item list reports
- Invoice summary reports
- Invoice list reports
- Hold statistical reports
- Hold list reports
- Hold count reports
- Fund summary reports
- Fund list reports
- Statistical reports

Below the dropdown is a table of saved reports:

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	Item Records Check	Use to periodically check item record data	3/16/2026	3/16/2026	ODINTESTER	Item list reports	Delete Edit

At the bottom, there are buttons for 'Schedule reports', 'Run reports', 'Publish report', and 'Advanced publish'. A note states: '*These limits apply only when a user clicks the 'Run reports' button. These limitations do not apply to scheduled reports.'

From here you can check the box next to the report and click Run reports and the report will run, and you can download it to your computer. You can also click the Edit button to change the criteria of the report and then save it and run it.

On the Fly Reports

Columns

- Item barcode
- MARC bibliographic record ID
- Item assigned collection name
- Item call number

- MARC title
- Item checkout date
- Item due date
- Item circ status
- Item system block

Filters

- Branch
- Item block, note, and funding filters : System block: Item was created on the fly (OTF)

ODIN has a page to help with On the Fly items: [Managing Items Created "On the Fly"](#)