Polaris® SimplyReports Guide

POLARIS
LIBRARY SYSTEMS

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Using SimplyReports

With Polaris SimplyReports, you can produce thousands of different kinds of reports using a simple Web-based interface. Using SimplyReports does not require in-depth knowledge of the Polaris database or expertise in Structured Query Language (SQL). You define the report criteria (parameters) by selecting the data columns for the report output and applying filters to limit the data.

Once you define the report parameters, you can download the report in a specified file format, or you can save the report parameters and schedule the report to run at a later time. The report's file format determines the report layout, see "Report Output Formats" on page 7. You can run list, count, or summary reports immediately, but you should save the parameters for statistical reports and run these reports when they will not affect daily processes.

When you save report parameters, the file appears as a "saved report"on the My reports tab. You can change report output columns for saved reports, but you cannot change the filters.

If your library has purchased Polaris Export Express, you can save the report output for item, bibliographic, and authority list reports in a variety of exportable file formats. As with other reports, you can save the export report parameters, and schedule the report to run at a later time. For more information, see "Using Export Express" on page 27.

The SimplyReports administrator sets up SimplyReports security, specifies the application defaults, maintains the master schedule, and specifies when reports can be scheduled to run. The administrator can also select the data columns available for reports and edit the names of the columns.

See the following topics:

- "Requirements and Compatibility" on page 2
- "Logging In and Out" on page 3
- "SimplyReports Tabs and Subtabs" on page 4
- "Report Output Formats" on page 7
- "Creating Reports" on page 8
- "Scheduling and Publishing Reports" on page 25
- "Managing the Application" on page 25
- "Getting Help with SimplyReports" on page 26

Requirements and Compatibility

Tip:
If the application opens but does not respond in FireFox, switch to Internet Explorer.

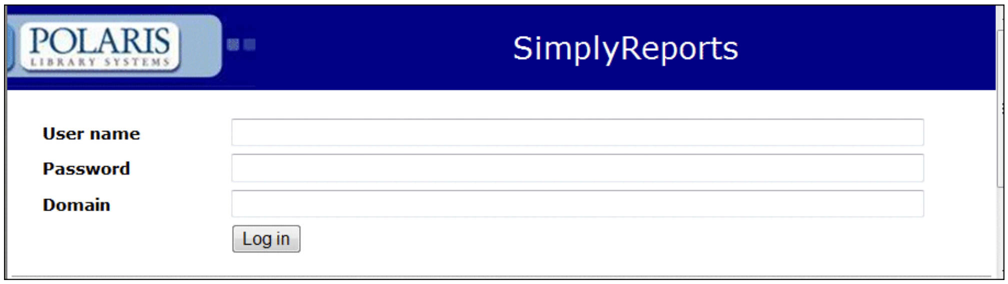
SimplyReports 4.1 is compatible with Polaris version 4.1. The application can be run using Microsoft® SQL Server® 2005 or Microsoft® SQL Server® 2008.

- **Servers** - SimplyReports can be run on the following servers:
  - Polaris production server
  - Polaris Reports Server
  - Any Windows® 2003 or Windows® 2008 server in your organization
- **Browsers** - SimplyReports is compatible with the following browsers:
  - Microsoft Internet Explorer® 5 or later
  - Netscape® 6 or later
  - Mozilla FireFox®

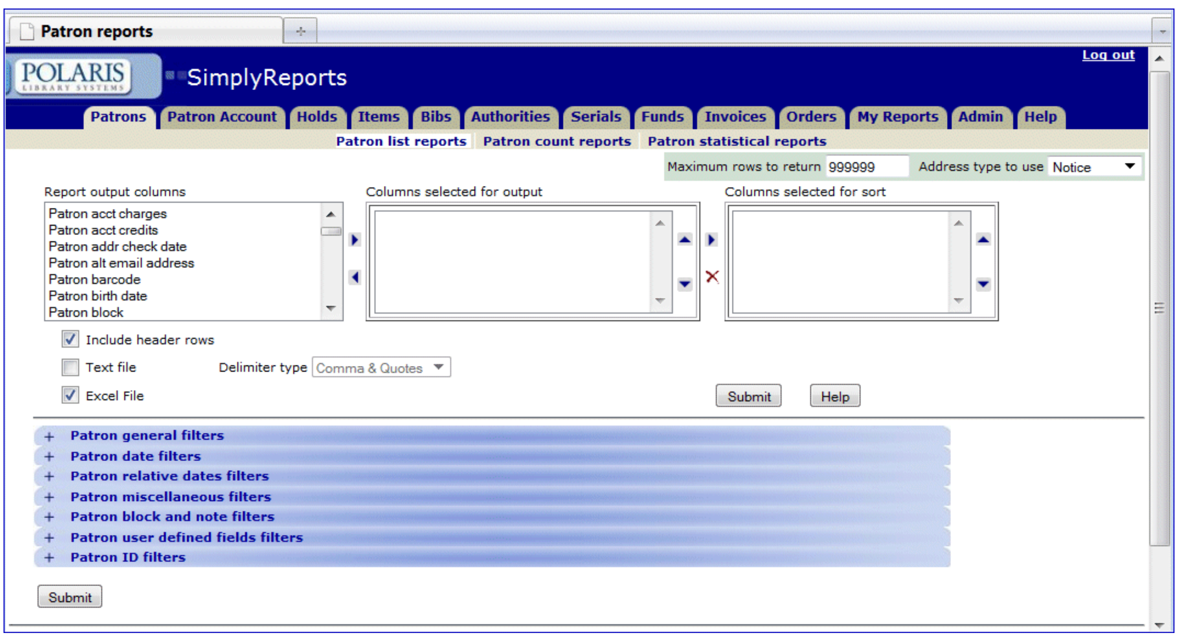
  Note:
  SimplyReports is not compatible with Opera.
- **Advanced Publishing** - Your current server software must be at least Microsoft SQL Server 2008 (version 10.x) to use the Advanced Publishing feature in SimplyReports. This feature provides a link between SimplyReports and the Microsoft® Report Builder 2.0 application distributed with Microsoft® Reporting Services 2008.
- **Exporting** - To export report output in MARC, Dublin Core, MARC XML, or LibraryThing formats, you must have a license for Export Express. Contact the Polaris Customer Sales department for more information about Export Express licensing.

Logging In and Out

Open SimplyReports from a desktop shortcut or a favorites link in your browser. Enter your user name, password and domain name on the log-in page.



After you log in, SimplyReports opens to the Patrons tab.



When you are done with the SimplyReports session, click **Log out** in the upper-right corner to close the application.

Note:
The SimplyReports session is refreshed automatically after a specified period of time. See “Set general SimplyReports application defaults” on page 63.

SimplyReports Tabs and Subtabs

SimplyReports consists of main tabs and subtabs. Each main report-creation tab represents the category of information you can query to create the report. For example, to create a report about item circulations, you would select the Items tab.

When you create a report in SimplyReports, you define the report parameters by selecting the columns for the report output and the filters to limit the data. The report parameters can be saved, or the report can be output in the selected format. SimplyReports includes main tabs for creating the following types of reports:

- **Patrons** - Create patron list, count, statistical, or history reports using data from patron registration records and patron account (status) records.
- **Patron Account** - Create patron account list, count, or statistical reports using data from patron account (status) records; and their linked patron registration, item and bibliographic records.
- **Holds** - Create holds list, count or statistical reports using data from hold request records; and their linked bibliographic, item, patron account (status), and patron registration records.
- **Items** - Create item list, count, statistical, or history reports using data from item records; and their linked patron account (status), patron registration, and bibliographic records.
- **Bibs** - Create bibliographic list, count, or statistical reports using data from bibliographic records and their linked item records.
- **Authorities** - Create authority list, count, or statistical reports using data from authority records; and their linked bibliographic and item records.
- **Serials** - Create serials list, count, or statistical reports using data from serial holdings records (including data from publication patterns and compressed holdings statements), serial issues/part records, and subscription records; and their linked supplier and item records.
- **Funds** - Create fund list or summary reports using data from fund records and fiscal year records; and their linked bibliographic and item records.
- **Invoices** - Create invoice list or summary reports using data from invoice records; and their linked fiscal year, fund, item, bibliographic, and supplier records.
- **Orders** - Create purchase order list or summary reports using data from purchase orders (including line item and segment data); and their linked fiscal year, fund, item, bibliographic, and supplier records.

Each main report-creation tab has subtabs for selecting the type of report, with different subtabs depending on the type of report:

- **List** - These reports list information in columns. For example, you could create a patron list report that shows all patrons who do not have an e-mail address in their record. List and count (or summary) reports offer the same types of data columns and filters for defining the report criteria, but the report output is different. See "Create a list, count, or summary report" on page 8.
- **Count** - These reports display counts. For example, you could create a patron count report that shows the total number of patron records added within the last year. See "Create a list, count, or summary report" on page 8.
- **Statistical** - These reports gather data based on transactions. Since gathering transaction data may slow system performance, the **Run report now** check box is unchecked by default for all statistical reports. Statistical reports can be scheduled to run when the library is closed.For example, you could create an item statistical report that shows the number of checkouts and renewals for the current year. See "Create a statistical report" on page 11.

  Important:
  To gather transaction data used in SimplyReports statistical reports, Polaris must be set up to log the appropriate transactions. For every type of transaction you want to include in a statistical report, transaction logging must be set to **Yes** in the Transaction Logging database table in Polaris Administration. The transactions are logged from the point you turn the logging function on. See the topic "Collecting Transaction Statistics" in Polaris staff client Help.

- **Summary** - These reports are available for summarizing acquisitions data from fund, invoice, and purchase order records. For example, you could generate an order summary report that shows the total dollar amount for all purchase orders for an organization.
- **History** - If your library uses history reports, and you have permission to access the subtabs, the **Patron history reports** subtab appear under the **Patron** tab and the **Item history reports** tab appears under the **Items** tab. Customers who choose not to use these reports can ask their Polaris Site Managers to disable them. If the reports are disabled for a library system, these subtabs do not appear for any SimplyReports users.

  Patron history reports show transactions during the specified time period involving a specific patron, such as the financial transactions, hold requests, and check outs. Item history reports show transactions during the specified time period involving a specific item, such as the check out, in-transit, and financial history.

  To protect patron privacy, SimplyReports has the following safeguards: the transaction results are limited to a period of no more than 95 days; the report parameters cannot be saved; and the ad-hoc report files are not written to the disc on the servers. In addition, access to these subtabs can be limited through permissions. See "Create a history report" on page 15.

In addition to the tabs for creating reports, SimplyReports includes the following tabs:

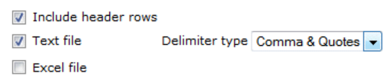
- **My Reports** - This tab has subtabs for working with saved reports (scheduling, running, and publishing reports), maintaining report files, and scheduling reports. See "Save report parameters" on page 24 and "Scheduling and Publishing Reports" on page 25.
- **Admin** - This tab has subtabs for managing permissions, setting application defaults, maintaining the master schedule, specifying the scheduling hours, and specifying the content for reports. See "Managing the Application" on page 25.
- **Help** - This tab opens the SimplyReports Guide pdf. See "Getting Help with SimplyReports" on page 26.

Note:
If you do not have permission to use a tab or subtab, that tab or subtab does not appear when you open SimplyReports. See "Setting Up SimplyReports Security" on page 54.

Report Output Formats

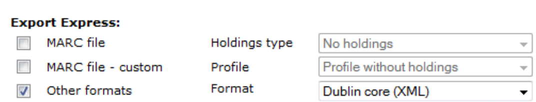
When you set up the report criteria, you also specify the report output file type. For list, count, and statistical report types, you can select the following types:

- **Excel**
- **Text** - When you select **Text**, you can select the delimiter type: **Comma and quote**, **Tab**, **Semi-colon**, **Colon**, or **Pipe**.



If your library has Export Express in addition to SimplyReports, you can also select the following formats for exporting records from the Item and Bibliographic list reports tabs:

- **MARC file -** If you select this file type, you select **No holdings or Include holdings** in the **Holdings type** box**.**
- **MARC file - custom**. If you select this option, you choose a custom export profile in the **Profile** box. See"Custom Profiles for Export Express" on page 28.
- **Other formats** - If you select this option, you choose **Dublin Core**, **MARC XML, or LibraryThing**



If your library uses Item or Patron history reports, you can specify the following report output types after entering the report criteria and previewing the history:

- **Excel**
- **Word**

Creating Reports

To create a report in SimplyReports, you specify the report parameters and either save them as a named saved report file to be run at a later date, or download the report output immediately. If your library has Export Express, you can define the report parameters and then export records in MARC format. See "Using Export Express" on page 27.

Create a list, count, or summary report

Each report-creation tab has subtabs for creating specific types of reports. For more information on the types of reports available on subtabs, see "SimplyReports Tabs and Subtabs" on page 4.

Follow these steps to create a list, count, or summary report.

1. Select the tab for the type of information you want on the report.
2. Select the list, count, or summary subtab for the type of report.
3. If you want to change the default maximum number of rows for the report, type a different number in the **Maximum rows to return** box in the upper, right corner of the report window.

Note:
The SimplyReports administrator sets the default maximum number of rows for reports, but you can change this for a specific report by typing over the number in the box.

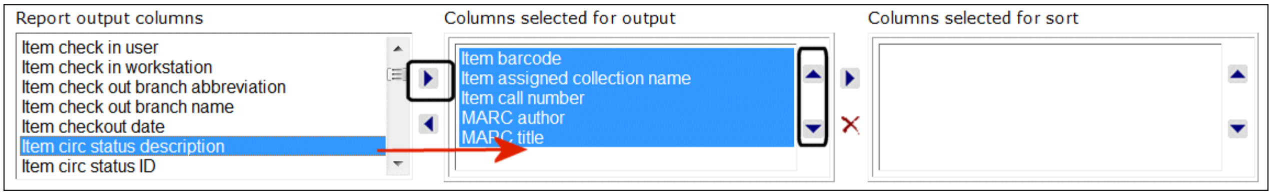
4. If the report has an **Address type to use** field, and you want to change it, select a different option.

Note:
For reports that have addresses (for example, patron reports), you can select the type of address to use. The address choices that display depend on the type of report and the selected organization. To change the address type to use in the report, select an option from the list.

Tip:
To select multiple columns, hold down the **Ctrl** key while selecting the columns.

5. To specify the columns to include in the report, select the columns in the left list, and click the right arrow to move them to the **Columns selected for output** list. For a list of the report columns, see "Database Columns" on page 100.

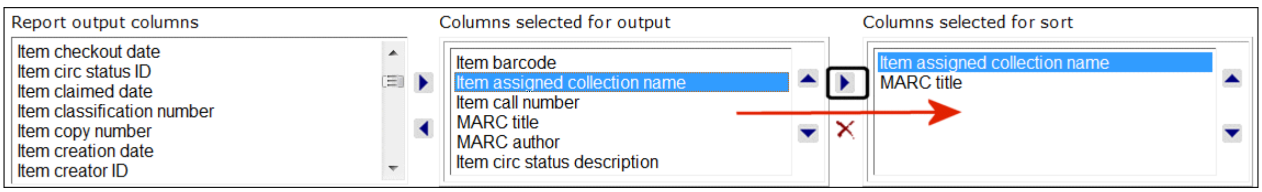
Note:
If you are setting up the report criteria to gather MARC records for export, you select only one column for output.



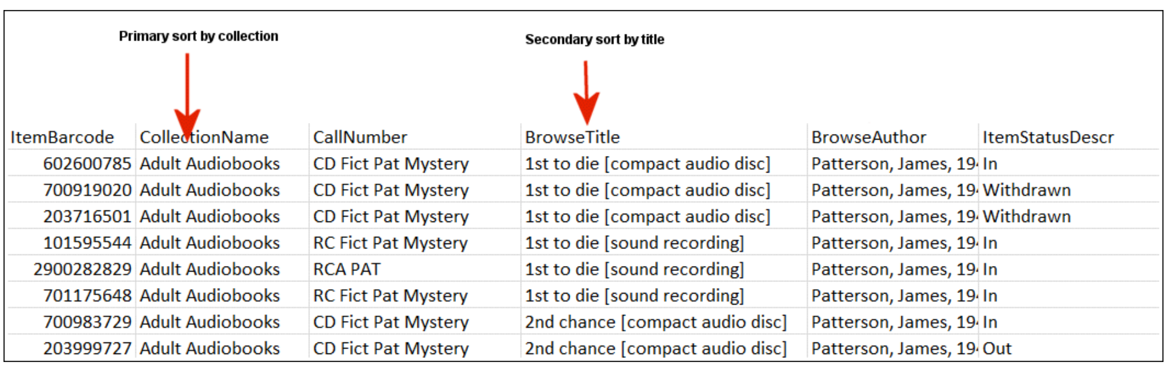
6. To reorder the columns from left to right on the report, use the up or down arrows. The top item in the list will be the first column on the left of the report, the second on the list will be the second column from the left, and so on.

Tip:
The names of the columns can be edited in SimplyReports Administration. See "Edit a report output column" on page 61.

7. To sort the items in the columns, select the columns to sort and click the right button to move them to the **Columns selected for sort** list.



The columns will be sorted in the order in which they appear on the list. For example, you can select collection name and then title. The report will be sorted by the collection name first, then by the title.



ItemBarcode	CollectionName	CallNumber	BrowseTitle	BrowseAuthor	ItemStatusDescr
602600785	Adult Audiobooks	CD Fict Pat Mystery	1st to die [compact audio disc]	Patterson, James, 19	In
700919020	Adult Audiobooks	CD Fict Pat Mystery	1st to die [compact audio disc]	Patterson, James, 19	Withdrawn
203716501	Adult Audiobooks	CD Fict Pat Mystery	1st to die [compact audio disc]	Patterson, James, 19	Withdrawn
101595544	Adult Audiobooks	RC Fict Pat Mystery	1st to die [sound recording]	Patterson, James, 19	In
2900282829	Adult Audiobooks	RCA PAT	1st to die [sound recording]	Patterson, James, 19	In
701175648	Adult Audiobooks	RC Fict Pat Mystery	1st to die [sound recording]	Patterson, James, 19	In
700983729	Adult Audiobooks	CD Fict Pat Mystery	2nd chance [compact audio disc]	Patterson, James, 19	In
203999727	Adult Audiobooks	CD Fict Pat Mystery	2nd chance [compact audio disc]	Patterson, James, 19	Out

8. Select the file type for the report:
   - **Text file** - If you select this file format, select an entry in the **Delimiter type** box.
   - **Excel** - This is the default file type. When you save the report output in this file type, the file is saved in Microsoft Excel format.

   These file types are available only if you have Export Express:
   - **MARC file** - If you select this box, select **No holdings** or **Include holdings**
   - **MARC file - custom** - If you select this box, select an export profile from the list.

- **DublinCore XML**
- **LibraryThing (MARC8)**
- **Authority Records - MARC21**

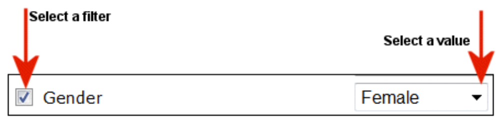
Note:
For more information, see "Using Export Express" on page 27.

9. To include a header row, select the **Include header rows** box.

Note:
The column headers do not have spaces between the words, but after the report is created, you can change them in Excel or in a text file.

Tip:
When you filter by branch, you can select the **Library quick pick** option to select all the branches associated with the selected library organization.

10. Select the filters to apply to the report, and select from the available options for the type of filter. See "Apply filters to limit the report output" on page 16.



11. Click Submit.

The report preview window appears.

12. Select one of the following options:
    - To create the report immediately, select the **Download report output** check box, click , and click **Open** on the File Download box. The report appears in the selected format.
    - To put the records in the report output into a record set, select the **Create** *(record type)* **record set from report results** check box, type the record set name and an optional note, and click . The record set is saved in the Polaris staff client.
    - To save the report criteria so that you can run the report at a later time, select the **Save report parameters for later use** check box, type a report name and description, and click . When you save the report criteria, the file appears as a "saved report" on the My reports tab. See "Using Saved Reports" on page 36.

Note:
See "Report Column & Filter Examples" on page 67 for examples of the data columns and filters to select when creating specific types of list or count reports.

Create a statistical report

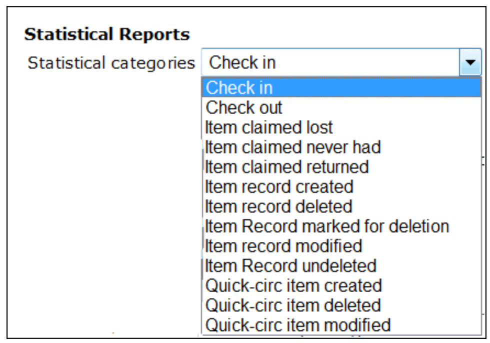
Follow these steps to create a statistical report.

1. Select the main tab for the type of statistical report.

   Note:
   Statistical reports are available for patron, patron account, holds, items, bibliographic, authority, and serials reports.

2. Select the subtab to create a statistical report.

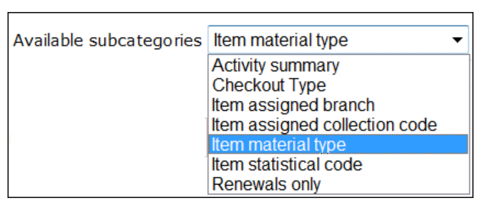
   Note:
   The statistical categories depend on the kind of statistical report you are creating. For example, for an item statistical report, you could report on transactions involving item records, such as check outs, check ins, or modifications to item records.



3. Select a subcategory.

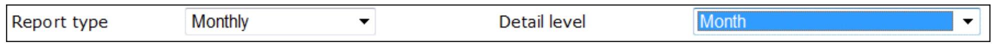
   The available subcategories depend on the selected statistical category.

   The available filters depend on the selected subcategory. For example, if you select **Item material type** for an item statistical report, the only filter available is the material type filter.



4. Selecting the report type and detail level.

   When you select a report type, the list in the **Detail level** may display options for the type of report, or it may display **Not applicable for this type of report**.



   You can select the following statistical report types:

   - **General summary** - Displays the transaction totals without chronological breakdown. No detail levels are available for this report type.
   - **Monthly** - Displays the transaction totals broken down by month. Two detail levels are available in the detail level drop-down list:

     Month - Displays the number of the month, and that month's transaction total for the selected statistical category (and subcategory). Selecting only **Month** will result in aggregation of monthly totals over multiple years.

     Year & Month - Displays the number of the month, the number of the year, and the transaction totals for the selected statistical category (and subcategory).
   - **Daily** - Displays the transaction totals broken down by day-of-month. Detail levels are available in the detail level drop-down list:

     Day - Displays the number of the day, and the transaction totals for the selected statistical category (and subcategory). Selecting only **Day** will result in the aggregation of daily totals over multiple years.

     Month & day - Displays the number of the day, the number of the month, and the transaction totals for the selected statistical category (and subcategory). Selecting only **Month & day** will result in aggregation of totals over multiple months and years.

     Year, month, & day - Displays the number of the day, number of the month, number of the year and the transaction totals for the selected statistical category (and subcategory).
   - **Yearly** - Displays the year and the transaction totals for the year selected. No detail levels are available for this report type.
   - **Hourly -** Displays the transaction totals broken down by hour. Four detail levels are in the **Detail level** drop-down list:

     Hour - Displays the hours and the total number of transactions for each hour.

     Day & hour - Displays the number of the day, the number of the hour, and the transaction totals for the selected statistical category (and subcategory). Selecting only **Day & hour** will result in the aggregation of hourly totals over multiple months and years.

Month, day & hour - Displays the number of the month, the number of the day, the number of the hour, and the transaction totals for the selected statistical category (and subcategory). Selecting only **Month, day & hour** will result in aggregation of totals over multiple years.

Year, month, day & hour - Displays the number of the hour, number of the day, number of the month, the number of the year, and the transaction totals for the selected statistical category (and subcategory).

- **Day of week** - Displays transaction totals broken down by day of the week. Three detail levels display in the **Detail level** drop-down list:

  Day of week - Displays the day of week and the total for the selected transaction category (and subcategory). Selecting only **Day of week** will result in the aggregation of totals over multiple weeks, months, and years.

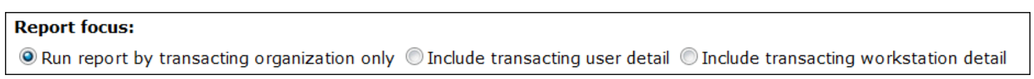
  Month & day of week - Displays the number of the month, the day of the week, and the transaction total of the selected category (and subcategory). Selecting only **Month and day of week** will result in the aggregation of totals over multiple weeks and years.

  Year & day of week - Displays the number of the year, the number of the month, the day of the week, and the transaction total for the selected category (and subcategory). Selecting only **Year & day of week** will result in the aggregation of totals over multiple weeks.

  Day of week by hour - Displays the day of week, the hour and the transaction totals for the selected category (and subcategory). No detail levels are available.

5. Select the report focus.

   You can run a statistical report by the transacting branch only, or you can include user or workstation detail. If you select **Run report by transacting organization only**, the options to include user or workstation detail are unavailable.



6. Filter by the transacting branch.

   You can limit the transactions by selecting a branch or branches from the **Transacting branch** list, which displays all the branches to which you have access. You can include branch information by selecting one of the following options:

   - **Include branch name** (default) - The transacting branch name (defined in Polaris).
   - **Include branch abbreviation** - The abbreviation (defined in Polaris).
   - **Include branch ID** - The Polaris numeric code for the branch.
   - **Combine branch totals** - Branch total aggregation. No individual branch information will appear on the report.

Tip:
If you select **Run report by transacting organization only**, the options to include user or workstation detail are unavailable.

7. Filter by workstation/user.

   You can limit the transactions to those performed by a specific user or on a specific workstation by selecting one of the following options:

   - **Include transacting user detail** and select a user or users from the **User** box.
   - **Include transacting workstation detail** and select a workstation or workstations in the **Workstation** box.

8. Filter by date.

   You can filter statistical reports to include transactions for a specific date range or for a time period relative to the report run date. If you select **Date range**, select a **Start date** and **End date**. See "Filter by Date Ranges" on page 18. If you select **Relative date,** enter a number and select **Days, Months or Years** before the report run date. See "Filter by Dates Relative to a Report Run Date" on page 18.

9. To include a header row, select the **Include header rows** box.

   Note:
   The column headers do not have spaces between the words, but after the report is created, you can change them in Excel or in a text file.

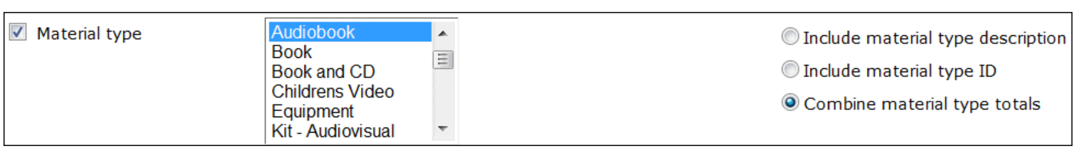
10. Select the file type for the report:

    - **Text file** - If you select this file format, select an entry in the **Delimiter type** box.
    - **Excel** - This is the default file type. When you save the report output in this file type, the file is saved in Microsoft Excel format.

    Note:
    When you save a statistical report in Excel format, you can use Excel's statistical functions after the report is generated.

11. Use other filters for statistical reports.

    The available filters for statistical reports depend on the selected subcategory. The filters also have options for including information such as description, ID, or totals.



12. Click Submit.

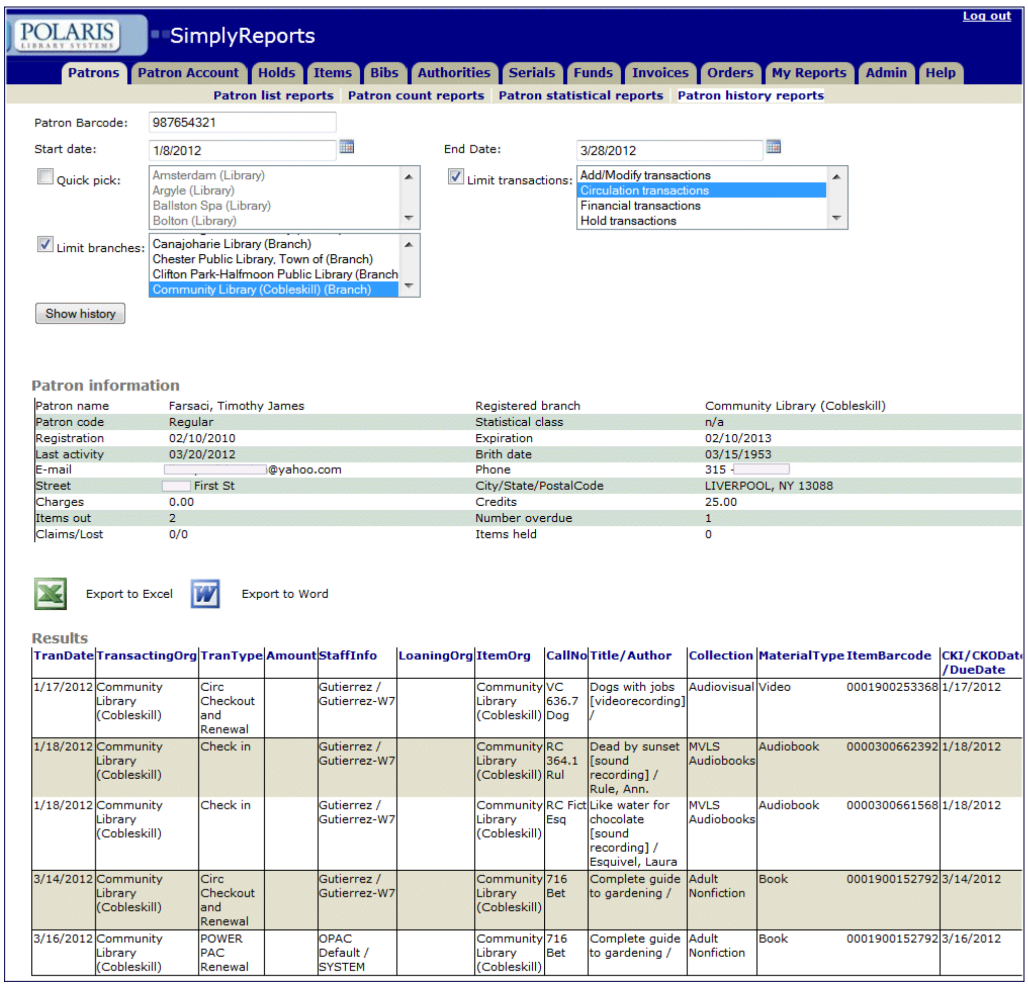
13. Select **Save report parameters for later use**. See "Using Saved Reports" on page 36.

Tip:
To preview a statistical report, the **Run report now** box must be checked before clicking Submit. Running a statistical report immediately may affect system performance.

Create a history report

Follow these steps to create a history report.

1. Select the Patron or Item tab.
2. Select the Patron history or Item history subtab.
3. Enter the patron or item barcode.
4. Select a start date and end date that spans no more than 95 days.
5. Limit the results to transactions for specific branches or transactions of certain types. If you do not limit the results, the report includes all transactions during the specified time period that involve the patron or item.
6. Click Show history to display the report results at the bottom of the expanded SimplyReports window.



The top portion of the expanded window displays the patron or item information. The bottom portion displays the results. You can sort the results list by clicking on the column headings. To go to other pages in the report results, select a different page number.

7. Export the report to Microsoft® Excel® or Microsoft® Word.

Note:
History reports cannot be saved or scheduled.

Apply filters to limit the report output

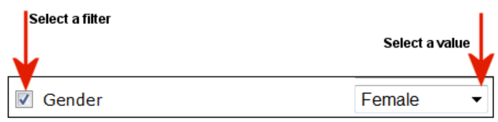
Report filters limit the report output by characteristics of the records for which you are creating the report, or by characteristics of linked records. For example, for an item report, you could apply an item filter to limit by assigned branch, and a bibliographic filter to limit by publication year. For more information, see “Filters” on page 72.

Tip:
The setting to expand or collapse the filters is on the Admin tab, Application Defaults subtab. If the filters are collapsed under a heading, click the plus sign (+) next to the heading and expand the filters one category at a time. See “Setting Application Defaults” on page 62.

Follow these steps to apply filters to limit the report output.

1. Select the main tab for the record type.
2. Select the subtab for the type of report.

   Select the filter check box to activate the options for the filter.
3. Select from the available options, which are applied using drop-down list boxes, check boxes, free-text fields, radio buttons, or date pickers.



Important:
If you select a filter check box next to a list, and you do not select a value or values in the list, the entire list is used to filter the data.

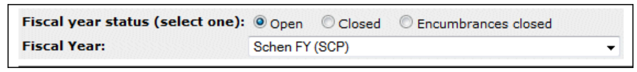
For more information on specific filter options, see the following topics:

- “Filter by Fiscal Year” on page 17
- “Filter by Counts or Amounts” on page 17
- “Filter by Missing Data” on page 17
- “Filter by a Library Organization’s Branches” on page 17
- “Filter by Date Ranges” on page 18
- “Filter by Dates Relative to a Report Run Date” on page 18
- “Filter by Check Box Settings” on page 19

4. After selecting the report output columns and filtering the data, click Submit to preview the report. See “Preview a report” on page 20.

Filter by Fiscal Year

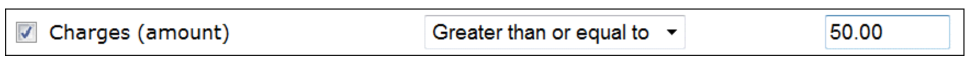
For Fund, Order, and Invoice reports, you must first select a fiscal year before selecting any other filters.



First, select the fiscal year status: Open, Closed, or Encumbrances closed. The drop-down list includes fiscal years with the selected status. Select a fiscal year from the list.

Filter by Counts or Amounts

You can use filters that limit the report output by counts or amounts less than or equal to, or greater than or equal to a number you specify. For example, you can limit a patron report to include only those patrons whose accounts have charges greater than or equal to $50.00.



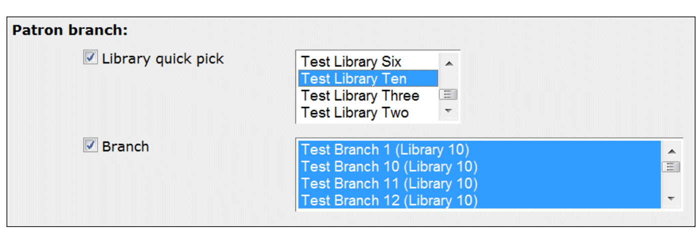
Filter by Missing Data

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 **Collection**, you can select the collections in the list that you want to include in the report output, or select **Not present** to limit the report to records that do not have a collection. If the filter has a date range or a number range, the range does not apply when you select **Not present**. For example, if the filter is **Import date**, and you select from and to dates and then select **Not present**, the filter limits the report output to records that do not have an import date.

Tip:
When you filter by branch, you can select the **Library quick pick** option to select all the branches associated with the selected library organization. To exclude specific branches, press **Ctrl + click** so that they are not highlighted.

Filter by a Library Organization's Branches

The library quick pick option is a quick way to select multiple branches under the same library organization. When you select a library, all the branches associated with the library are also selected. If you select multiple libraries, all the branches associated with those libraries are selected.



Filter by Record Set

When you select a record set filter, the list of record sets is limited to the record sets you have permission to access in the Polaris staff client. For example, if you have the permission **Use 'own' cataloging record sets**, the list of record sets in the filter includes only record sets you created.

Filter by Date Ranges

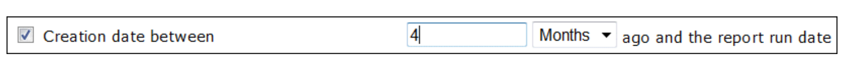
Date filters limit the report output to a specified time period between *from* and *to* dates, including the from and to dates. For example, you could set a date filter to limit the report output to patron records with registration dates beginning at 1/1/2011 and ending at 1/1/2012.

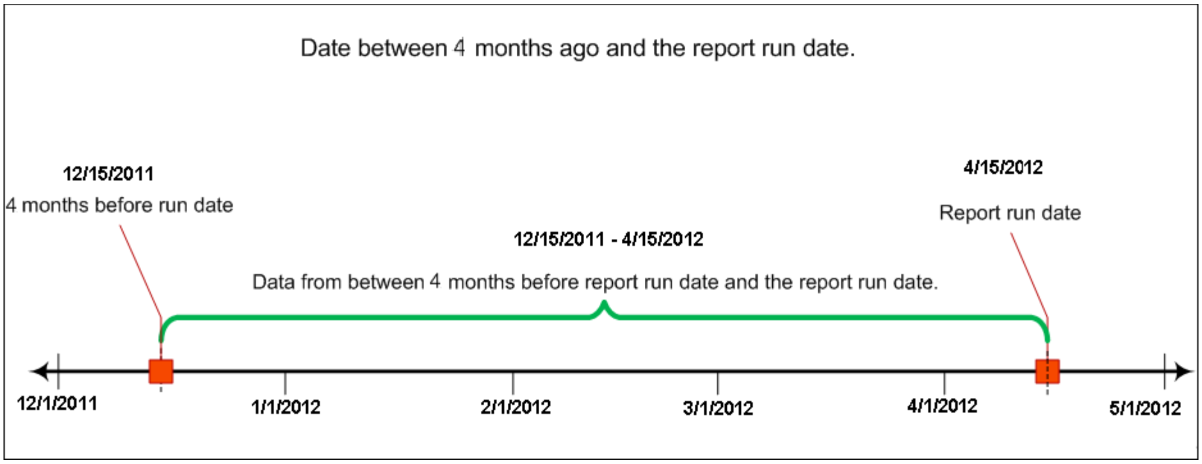
To enter a date in a box, click the calendar, and select a date from the calendar window. The calendar shows the current date. Click ≤ to go back a month, click ≥ to go forward a month, or select a month in the list box. You can also select a different month or year in the list boxes at the top of the calendar dialog box.

Filter by Dates Relative to a Report Run Date

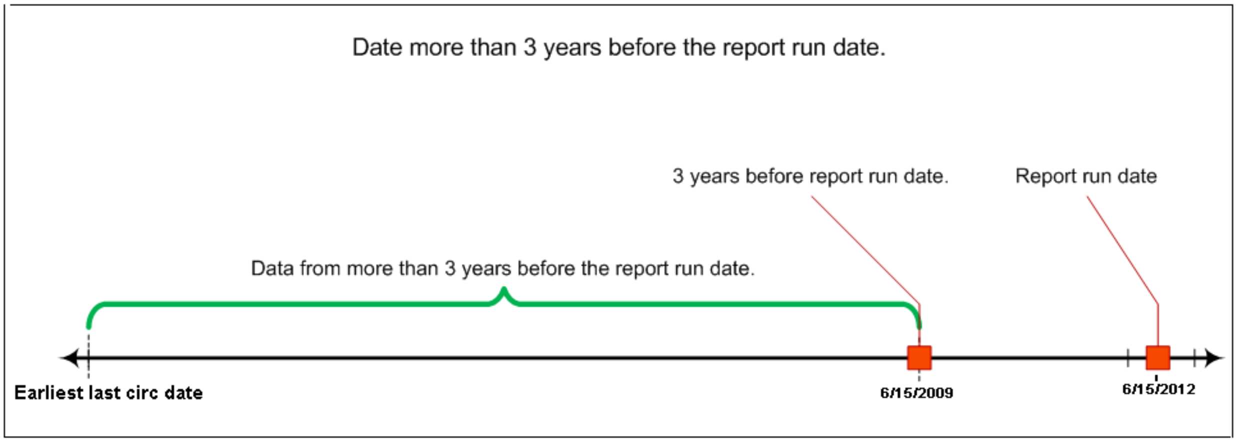
Relative date filters are useful when you schedule a report to run on a future date. There are two types of relative date filters:

- ***Between* relative date filters -** The **between** relative date filter limits the report output to records where the action was taken within the time period beginning a specified number of days, months, or years before the report run date and ending with (and including) the report run date. For example, you could create an item list report to show items created within the four months before the report run date, and then schedule the report to run every four months. You create an item list report, select the data columns, apply any other filters, and select **Creation date between**, and select **4** and **Months**.





- ***More than* relative date filters** - The **more than** relative date filter limits the report output to records where the action was taken earlier than a specified number of days, months, or years before the report run date. For example, you could create a report that shows the items that were last circulated at least three years before the report run date, and then schedule the report to run once a year. You create an item list report, select the data columns, apply any other filters, and select **Last check out or renewal date was more than**, and select **3** and **Years**.



Filter by Check Box Settings

Some filters limit the report output based on whether a specific check box is checked or unchecked in a workform. For example, you could limit an item report to show only those records with the **Holdable** box checked on the Item Record workform.

Preview a report

After selecting the report output columns, the columns to sort, and the filters, you can preview the output before running the report or saving the report parameters for later use. The preview window is used for checking a list, count, or summary report.

Note:
To preview a statistical report, the **Run report now** box must be checked before clicking Submit. Running a statistical report immediately may affect system performance. See "Create a statistical report" on page 11.

Follow these basic steps to preview a report.

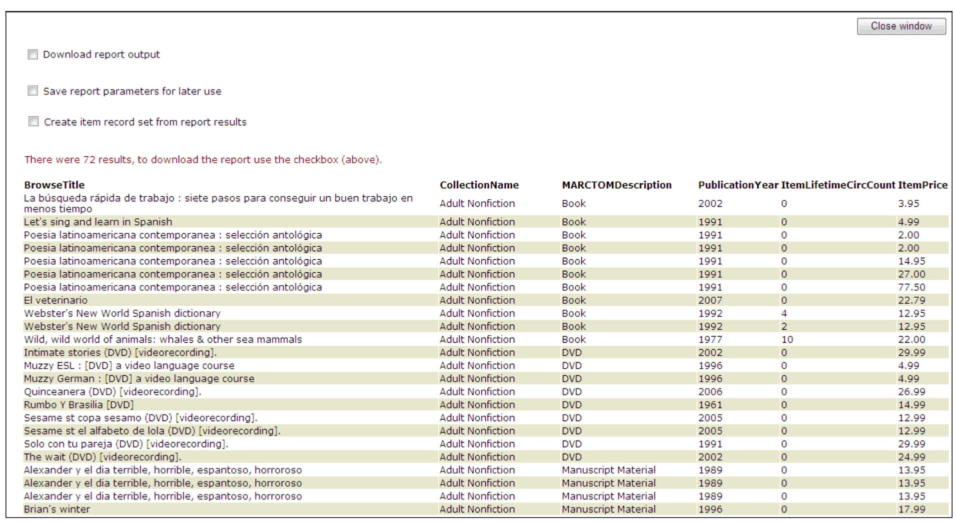
1. Select the main tab for the record type.
2. Select the list, count, or summary subtab.
3. Create a list, count, or summary report. See "Create a list, count, or summary report" on page 8.
4. Click Submit.

   The preview window displays the first 1,000 rows of the report and the total count of all the rows that will be in the report.

Tip:
If the report output is not what you expected, you can close the preview window and change the settings. You can edit and preview the report output as many times as you want before downloading the report or saving the report parameters.

When you have set up report parameters in order to create a file of records to export using Export Express, you can download the report output immediately in the chosen exportable file format, or you can save the report parameters as a saved report to run later. See "Using Export Express" on page 27.

Note:
If you are previewing an export report, be sure to set the **Maximum number of rows to return** box to a number that allows you to preview the results before saving the report. This setting is not saved when you save an export report; it simply allows you to preview the report.

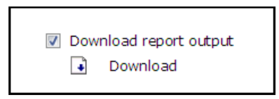


BrowseTitle	CollectionName	MARCTOMDescription	PublicationYear	ItemLifetimeCircCount	ItemPrice
La búsqueda rápida de trabajo : siete pasos para conseguir un buen trabajo en menos tiempo	Adult Nonfiction	Book	2002	0	3.95
Let's sing and learn in Spanish	Adult Nonfiction	Book	1991	0	4.99
Poesia latinoamericana contemporanea : selección antológica	Adult Nonfiction	Book	1991	0	2.00
Poesia latinoamericana contemporanea : selección antológica	Adult Nonfiction	Book	1991	0	2.00
Poesia latinoamericana contemporanea : selección antológica	Adult Nonfiction	Book	1991	0	14.95
Poesia latinoamericana contemporanea : selección antológica	Adult Nonfiction	Book	1991	0	27.00
Poesia latinoamericana contemporanea : selección antológica	Adult Nonfiction	Book	1991	0	77.50
El veterinario	Adult Nonfiction	Book	2007	0	22.79
Webster's New World Spanish dictionary	Adult Nonfiction	Book	1992	4	12.95
Webster's New World Spanish dictionary	Adult Nonfiction	Book	1992	2	12.95
Wild, wild world of animals: whales & other sea mammals	Adult Nonfiction	Book	1977	10	22.00
Intimate stories (DVD) [videorecording].	Adult Nonfiction	DVD	2002	0	29.99
Muzzy ESL : [DVD] a video language course	Adult Nonfiction	DVD	1996	0	4.99
Muzzy German : [DVD] a video language course	Adult Nonfiction	DVD	1996	0	4.99
Quinceanera (DVD) [videorecording].	Adult Nonfiction	DVD	2006	0	26.99
Rumbo Y Brasilia [DVD]	Adult Nonfiction	DVD	1961	0	14.99
Sesame st copa sesamo (DVD) [videorecording].	Adult Nonfiction	DVD	2005	0	12.99
Sesame st el alfabeto de lola (DVD) [videorecording].	Adult Nonfiction	DVD	2005	0	12.99
Solo con tu pareja (DVD) [videorecording].	Adult Nonfiction	DVD	1991	0	29.99
The wait (DVD) [videorecording].	Adult Nonfiction	DVD	2002	0	24.99
Alexander y el dia terrible, horrible, espantoso, horroroso	Adult Nonfiction	Manuscript Material	1989	0	13.95
Alexander y el dia terrible, horrible, espantoso, horroroso	Adult Nonfiction	Manuscript Material	1989	0	13.95
Alexander y el dia terrible, horrible, espantoso, horroroso	Adult Nonfiction	Manuscript Material	1989	0	13.95
Brian's winter	Adult Nonfiction	Manuscript Material	1996	0	17.99

Download the report output

Important:
If you have set up export criteria and select **Download report output** to run the export job immediately, SimplyReports may time out. This time-out limit prevents large export jobs from adversely affecting system performance. Instead, save the report parameters and schedule the saved report so that the records are extracted for export after hours. For more information, see "Using Export Express" on page 27.

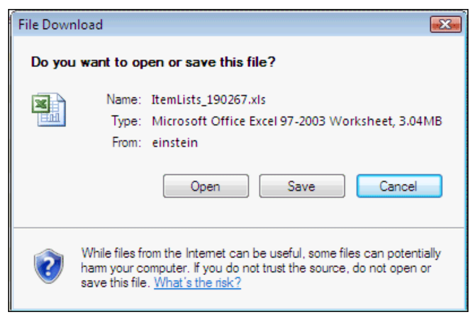
1. Preview the report in the Report Preview window. See "Preview a report" on page 20.
2. Select the **Download report output** check box.

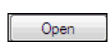


The Download button appears.

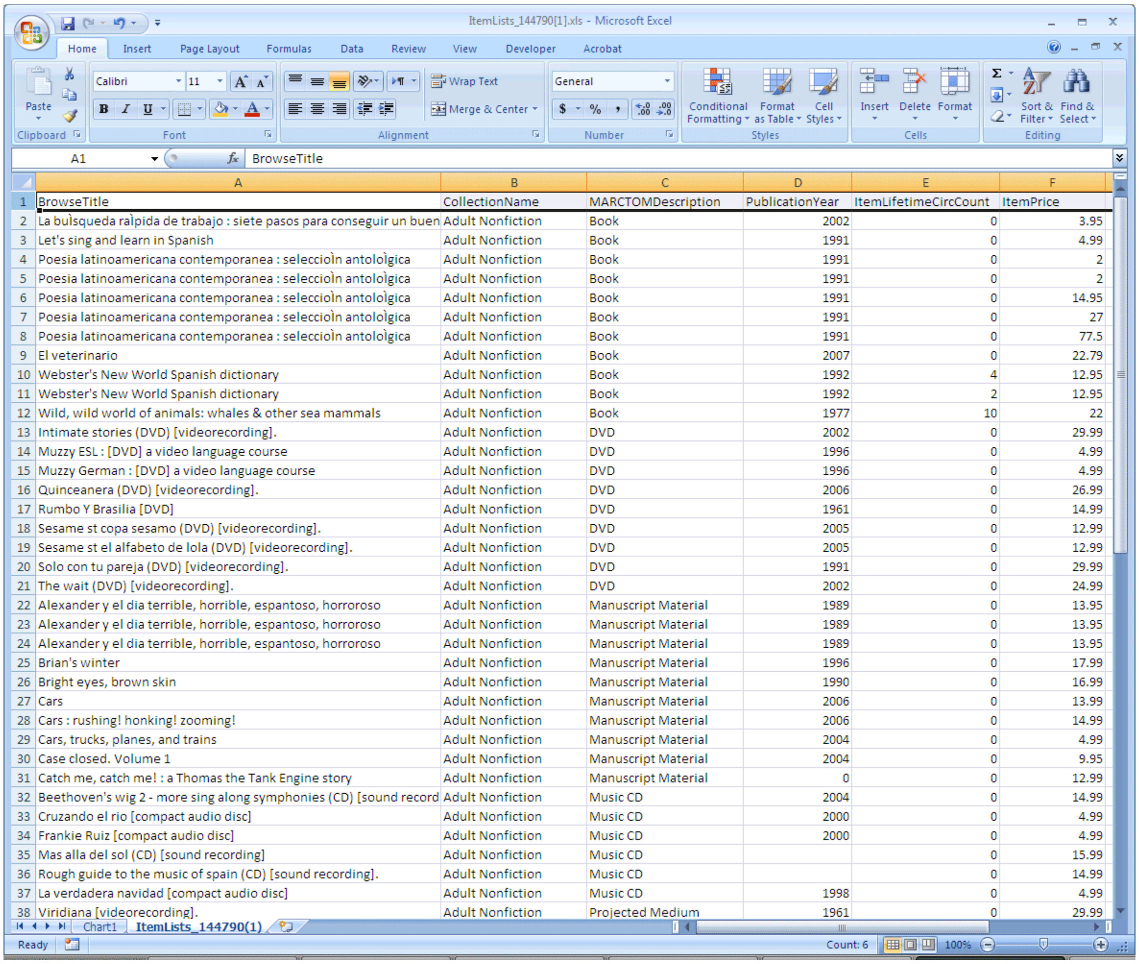
3. Click  .

The File Download dialog box appears.



4. Click .

5. The report appears in the selected format.



	A	B	C	D	E	F
1	BrowseTitle	CollectionName	MARCTOMDescription	PublicationYear	ItemLifetimeCircCount	ItemPrice
2	La buÌsqueda raÌpida de trabajo : siete pasos para conseguir un buen	Adult Nonfiction	Book	2002	0	3.95
3	Let's sing and learn in Spanish	Adult Nonfiction	Book	1991	0	4.99
4	Poesia latinoamericana contemporanea : seleccioÌn antoloÌgica	Adult Nonfiction	Book	1991	0	2
5	Poesia latinoamericana contemporanea : seleccioÌn antoloÌgica	Adult Nonfiction	Book	1991	0	2
6	Poesia latinoamericana contemporanea : seleccioÌn antoloÌgica	Adult Nonfiction	Book	1991	0	14.95
7	Poesia latinoamericana contemporanea : seleccioÌn antoloÌgica	Adult Nonfiction	Book	1991	0	27
8	Poesia latinoamericana contemporanea : seleccioÌn antoloÌgica	Adult Nonfiction	Book	1991	0	77.5
9	El veterinario	Adult Nonfiction	Book	2007	0	22.79
10	Webster's New World Spanish dictionary	Adult Nonfiction	Book	1992	4	12.95
11	Webster's New World Spanish dictionary	Adult Nonfiction	Book	1992	2	12.95
12	Wild, wild world of animals: whales & other sea mammals	Adult Nonfiction	Book	1977	10	22
13	Intimate stories (DVD) [videorecording].	Adult Nonfiction	DVD	2002	0	29.99
14	Muzzy ESL : [DVD] a video language course	Adult Nonfiction	DVD	1996	0	4.99
15	Muzzy German : [DVD] a video language course	Adult Nonfiction	DVD	1996	0	4.99
16	Quinceanera (DVD) [videorecording].	Adult Nonfiction	DVD	2006	0	26.99
17	Rumbo Y Brasilia [DVD]	Adult Nonfiction	DVD	1961	0	14.99
18	Sesame st copa sesamo (DVD) [videorecording].	Adult Nonfiction	DVD	2005	0	12.99
19	Sesame st el alfabeto de lola (DVD) [videorecording].	Adult Nonfiction	DVD	2005	0	12.99
20	Solo con tu pareja (DVD) [videorecording].	Adult Nonfiction	DVD	1991	0	29.99
21	The wait (DVD) [videorecording].	Adult Nonfiction	DVD	2002	0	24.99
22	Alexander y el dia terrible, horrible, espantoso, horroroso	Adult Nonfiction	Manuscript Material	1989	0	13.95
23	Alexander y el dia terrible, horrible, espantoso, horroroso	Adult Nonfiction	Manuscript Material	1989	0	13.95
24	Alexander y el dia terrible, horrible, espantoso, horroroso	Adult Nonfiction	Manuscript Material	1989	0	13.95
25	Brian's winter	Adult Nonfiction	Manuscript Material	1996	0	17.99
26	Bright eyes, brown skin	Adult Nonfiction	Manuscript Material	1990	0	16.99
27	Cars	Adult Nonfiction	Manuscript Material	2006	0	13.99
28	Cars : rushing! honking! zooming!	Adult Nonfiction	Manuscript Material	2006	0	14.99
29	Cars, trucks, planes, and trains	Adult Nonfiction	Manuscript Material	2004	0	4.99
30	Case closed. Volume 1	Adult Nonfiction	Manuscript Material	2004	0	9.95
31	Catch me, catch me! : a Thomas the Tank Engine story	Adult Nonfiction	Manuscript Material	0	0	12.99
32	Beethoven's wig 2 - more sing along symphonies (CD) [sound record	Adult Nonfiction	Music CD	2004	0	14.99
33	Cruzando el rio [compact audio disc]	Adult Nonfiction	Music CD	2000	0	4.99
34	Frankie Ruiz [compact audio disc]	Adult Nonfiction	Music CD	2000	0	4.99
35	Mas alla del sol (CD) [sound recording]	Adult Nonfiction	Music CD		0	15.99
36	Rough guide to the music of spain (CD) [sound recording].	Adult Nonfiction	Music CD		0	14.99
37	La verdadera navidad [compact audio disc]	Adult Nonfiction	Music CD	1998	0	4.99
38	Viridiana [videorecording].	Adult Nonfiction	Projected Medium	1961	0	29.99

6. Make any changes to the report and save it.

Tip:
You can change the column headers so they are more easily understood. For example, you could change **BrowseTitle** to **Title** and **ItemBranchName** to **Branch**.

Important:
Barcodes do not display correctly in Excel format. To correct this display problem in Excel, select the column header, right-click, and select **Format Cells**. In the Format Cells dialog box, select **Number** under **Category**, select or type **0** in the **Decimal place** box, and click **OK**. The barcodes are then formatted correctly.

7. Select **File, Print** to print the report.

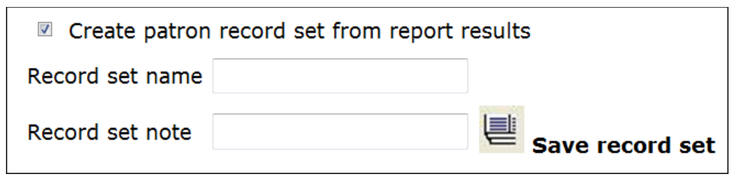
Create a record set from the report output

When you preview the report output for certain types of list reports, you have the option to create a record set from the report results. You can create a patron record set from the preview window for Patron list reports, Patron account list reports, and Holds list reports. You can create an Item record set for an Item list report, a bibliographic record set for a Bib list report, and an authority record set for an Authority list report.

Tip:
Creating records sets of the report output is very useful if you want to make changes to all the records at once using the bulk change process in the Polaris staff client.

Follow these steps to create a record set of the records in the report output.

1. Preview the report in the Report Preview window. See "Preview a report" on page 20.
2. Select the **Create** *(record type)* **record set from report results** check box.



3. Type the record set name, and a note if you want a note to appear in the Record Set workform in the Polaris staff client.
4. Click .

   The record set is saved in the Polaris staff client. You can find the record set by searching for its name.

Save report parameters

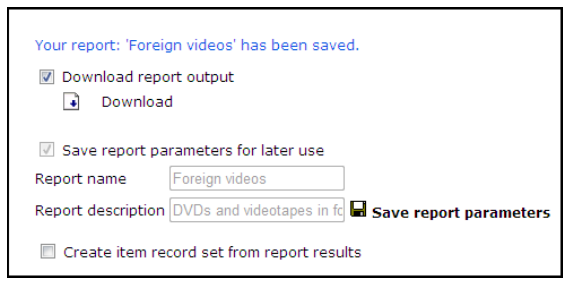
Follow these steps to save the report parameters for use at a later time.

1. Preview the report in the Report Preview window. See “Preview a report” on page 20.
2. Select the **Save report parameters for later use** check box.

   The area expands.

3. Type a name for the report and a description, and click .

   A message at the top of the preview window tells you that the report was saved.



4. To see the saved report, click the My Reports tab, and select the report type in the list box. The report appears in the list. For more information, see “Using Saved Reports” on page 36.

   Important:
   Each SimplyReports user has access only to the reports he or she created. To allow all staff members access to the reports created in SimplyReports, the reports must be published so they are available from the Polaris Shortcut Bar under Custom reports. See “Publish saved reports to the Polaris Shortcut Bar” on page 42.

Editing a saved report

You can edit the columns, the file type, and the assigned branch for list and count reports, but you cannot select different filters. Statistical reports cannot be edited. See “Edit a saved report” on page 40.

Scheduling and Publishing Reports

After saving the parameters with a file name, the named file appears in the reports list on the My Reports tab, and you can schedule the report to run once or at specified intervals. You can also publish saved reports and make them available from the Polaris Shortcut Bar, along with the other standard Polaris reports. For more information, see "Using Saved Reports" on page 36.

If your server software is at least at Microsoft SQL Server 2008 (version 10.x), you can use the Advanced Publishing feature in SimplyReports. This feature provides a link between SimplyReports and the Microsoft Report Builder 2.0 application, distributed with Microsoft Reporting Services 2008. The SQL statement that underlies the report dataset is created in SimplyReports, and Report Builder enhances the report presentation with the following features:

- Totals and subtotals
- Grouping and paging
- Subreports
- Matrices and graphs

Managing the Application

The SimplyReports administrator sets the security for SimplyReports, sets or changes application defaults, maintains the master schedule, and edits the available columns for the reports. For more information, see the following topics:

- "Setting Up SimplyReports Security" on page 54
- "Setting Application Defaults" on page 62
- "Maintaining the Master Schedule" on page 58

Getting Help with SimplyReports

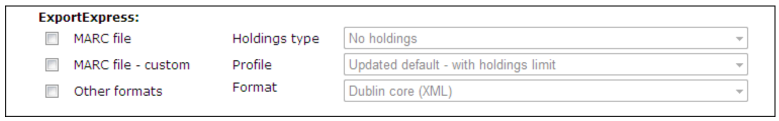
SimplyReports has two types of Help: a printable pdf of the *SimplyReports Guide* and context-sensitive Help specific to the displayed subtab. Select the Help tab to open the *SimplyReports Guide* in pdf format. The pdf includes hypertext links in the table of contents, index, and cross-references. You can also navigate through the pdf using bookmarks. Click Help on a subtab page to get help with the options available on that subtab page.

Using Export Express

Export Express is offered by Polaris Library Systems under a separate license as an optional feature for SimplyReports. If your library has purchased Polaris Export Express, you can save the report output for item, bib, and authority list reports in a variety of exportable file formats.

If your library has Export Express, you will see the following options:

- Export Express file formats on the Item list reports and Bib list reports subtabs that allow you to save the records in exportable formats.



- Export Express MARC file format on the Authority list reports subtab.

- Export profiles subtab on the Bibs tab - You can use the default profile to include or exclude embedded holdings data, or you can create a custom profile. See "Custom Profiles for Export Express" on page 28. The default profile used for exporting holdings data gathers the holdings data in the 852 tag. See "Default Holdings Data in 852 Tags" on page 34.

Note:
Separate security settings control Export Express, so you can allow SimplyReports users to save the export parameters without actually creating the files for export. For more information, see "Setting Up SimplyReports Security" on page 54.

Custom Profiles for Export Express

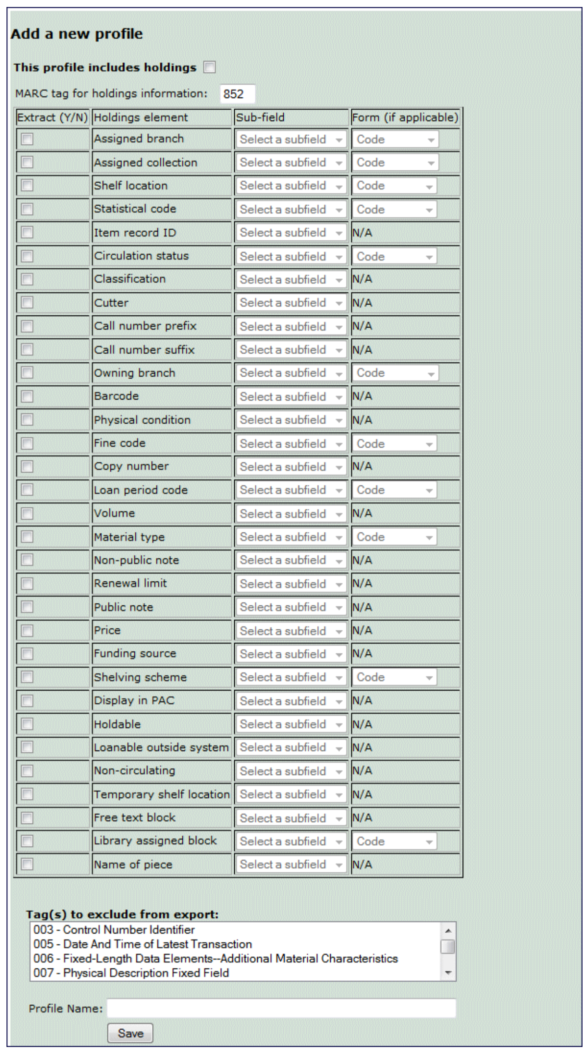
If you have the required permissions, you can create, edit and delete profiles for Export Express custom MARC exports. Export profiles are used in custom MARC exports to specify the tag and subfields for holdings data, or to exclude specific MARC tags. When you create a custom export profile, it is available in the list of profiles if you select the Export Express format **MARC file custom** on the Item list reports or Bib list reports subtab.

Create or modify an export profile

Follow these steps to create an export profile.

1. On the Bibs tab, Export profiles subtab, do one of the following tasks:
   - To modify an existing profile, select it, and click View.
   - To add a new profile, click Add.

   The **Modify a profile** or **Add a new profile** window appears.



Add a new profile

This profile includes holdings

MARC tag for holdings information: 852

Extract (Y/N)	Holdings element	Sub-field	Form (if applicable)
	Assigned branch	Select a subfield	Code
	Assigned collection	Select a subfield	Code
	Shelf location	Select a subfield	Code
	Statistical code	Select a subfield	Code
	Item record ID	Select a subfield	N/A
	Circulation status	Select a subfield	Code
	Classification	Select a subfield	N/A
	Cutter	Select a subfield	N/A
	Call number prefix	Select a subfield	N/A
	Call number suffix	Select a subfield	N/A
	Owning branch	Select a subfield	Code
	Barcode	Select a subfield	N/A
	Physical condition	Select a subfield	N/A
	Fine code	Select a subfield	Code
	Copy number	Select a subfield	N/A
	Loan period code	Select a subfield	Code
	Volume	Select a subfield	N/A
	Material type	Select a subfield	Code
	Non-public note	Select a subfield	N/A
	Renewal limit	Select a subfield	N/A
	Public note	Select a subfield	N/A
	Price	Select a subfield	N/A
	Funding source	Select a subfield	N/A
	Shelving scheme	Select a subfield	Code
	Display in PAC	Select a subfield	N/A
	Holdable	Select a subfield	N/A
	Loanable outside system	Select a subfield	N/A
	Non-circulating	Select a subfield	N/A
	Temporary shelf location	Select a subfield	N/A
	Free text block	Select a subfield	N/A
	Library assigned block	Select a subfield	Code
	Name of piece	Select a subfield	N/A

Tag(s) to exclude from export:

003 - Control Number Identifier
005 - Date And Time of Latest Transaction
006 - Fixed-Length Data Elements--Additional Material Characteristics
007 - Physical Description Fixed Field

Profile Name:

Save

2. To include holdings information in the export profile, select the **This profile includes holdings** check box, and do the following:

   a) In the **MARC tag for holdings information** box, type the bibliographic tag number where the holdings information is stored.

   b) For each holdings element to include in the holdings data, select the check box in the **Extract Y/N** column, and select the corresponding subfield to map to the holdings element.

   c) If applicable, select the form of the data in the **Form (if applicable)** column. This selection is available only for elements that have more than one format. For example, an assigned branch has a code (numeric ID), a name, and an abbreviation. Use the drop-down list to select which form is exported.

   Note:
   To create an export profile without holdings data, you must select at least one tag to exclude from the profile.

3. To exclude tags from the export, select the **Tag(s) to exclude from export** check box, and select one or more tags.
4. Type a name for the export profile in the **Profile** box.
5. Click Save.

   The new or modified export profile is saved and appears in the list of export profiles.

   For more information, click Help on the Export profiles subtab.

Special Reports for Export Express

When a report is run using an Export Express file format, a text file beginning with **REPORT** is created that includes the following information:

- Date and time of the export
- Name of the file
- Number of records exported
- Export profile used (if any)
- A list of records not exported because of formatting errors. For each bibliographic record listed, the following information is included: LCCN, the title, and the author. For each authority record listed, the following information is included: LCCN and heading.

These reports are available from the File maintenance subtab of the My Reports tab. For more information, see “Maintaining SimplyReports Files” on page 49.

Using Export Express for LibraryThing Exports

Tip:
Beginning with Polaris SimplyReports version 3.6, LibraryThing exports are in MARC21 format; earlier versions were in tab-delimited format.

If you use LibraryThing for Libraries to provide enriched content (such as tag "clouds," related titles, and reviews) in the Polaris PowerPAC, you can use SimplyReports and Export Express to gather your cataloging data for export to LibraryThing. When you do an initial export, you might include all the titles in your Polaris database. For subsequent exports to LibraryThing, you can do incremental exports of the new titles.

To get updates from LibraryThing, create SimplyReports export parameters for gathering the titles that were recently added to your database. Then, save the parameters in a saved report, and schedule the report to run at specified intervals, such as once a month. The records are extracted and saved in the export file according to the schedule and the report parameters.

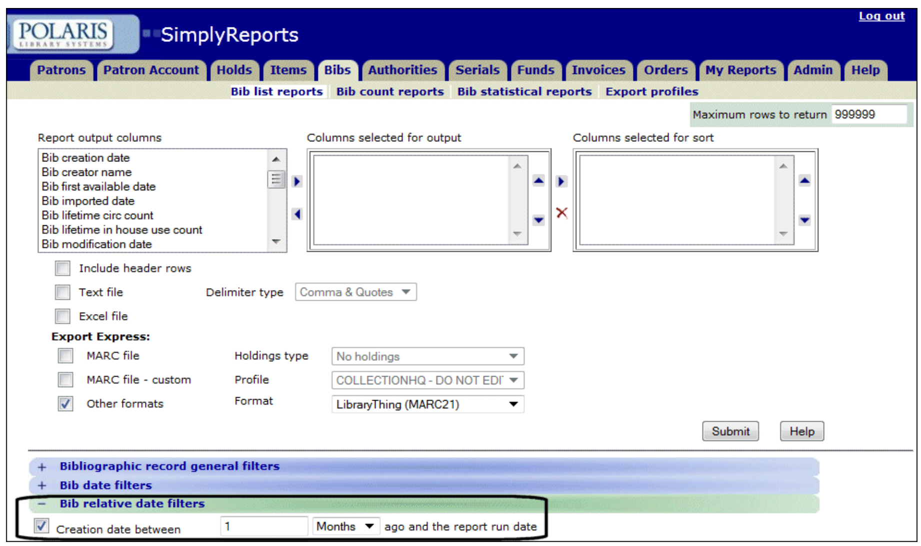
Example of Export Express for LibraryThing Updates

Set up the export criteria to gather all the MARC bibliographic records that were created or imported into the Polaris database within 30 days of the report run date. Schedule the report to export the records to a LibraryThing MARC file once a month. Then, send the updates to LibraryThing.

To do this, follow these steps:

Tip:
Set the **Maximum rows to return** to 1 so the report preview is generated quickly. This setting does not affect the report output.

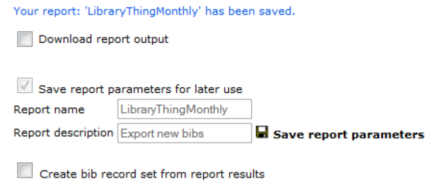
1. On the Bib list report sub-tab, choose any column for output. The column does not matter for exportable files, but you must choose at least one output column.
2. Select **Other formats**, and select **LibraryThing**.
3. Expand the **Bib relative date filters** section, select **Creation date between**, type **1**, and select **Month**.



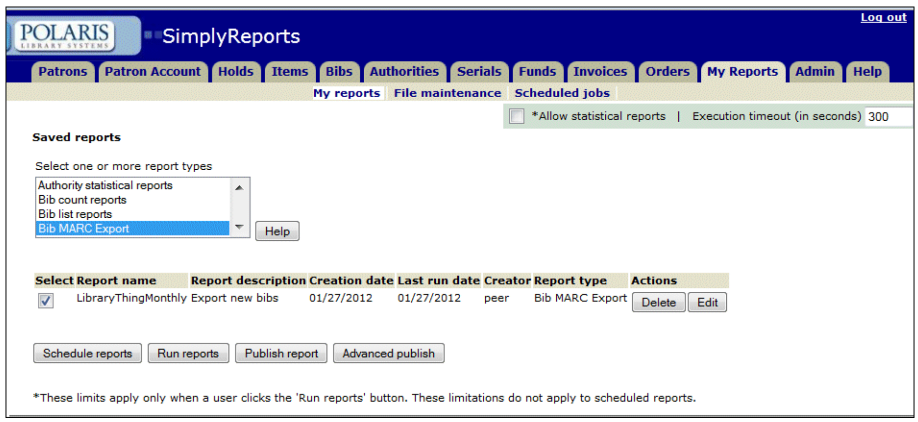
4. Click Submit.

   The Report Preview window appears.
5. Select **Save report parameters for later use**.
6. Type a name for the report.
7. Type a description for the report.
8. Click .

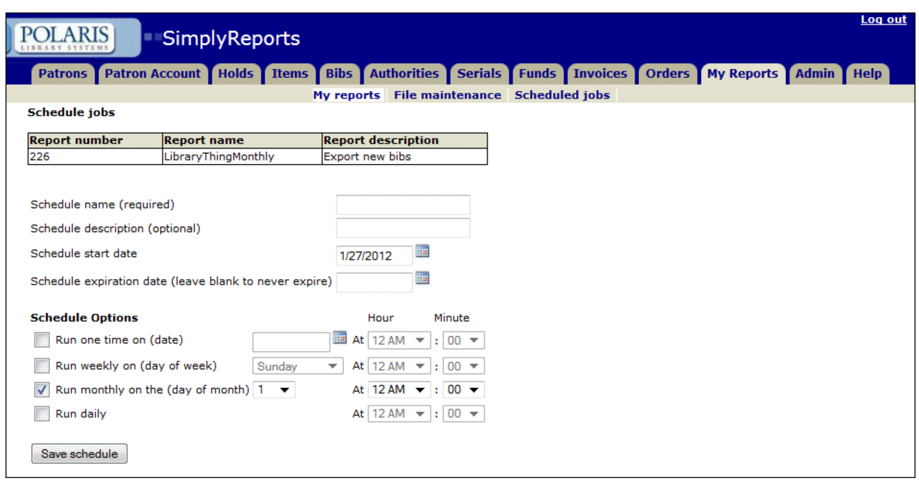
   A message confirms the report has been saved.



9. To see your saved report, select the My Reports tab.
10. Select **Bib MARC Export** in the **Saved reports** list to display reports saved in this format.
11. Select the check box next to the report (export) you want to schedule.



12. Click Schedule reports .
13. The **Schedule jobs** options appear.
14. Select **Run monthly on the day of month**, and select **1** in the box.



Tip:
LibraryThing export files do not contain records with a provisional status, records marked for deletion, or records that do not display in the PAC.

15. Click Save schedule.

The LibraryThing file will be created on the first of every month containing the titles added within the month previous to the report run date. The file is created and saved to your desktop automatically, but you must send it to LibraryThing according to the company's instructions.

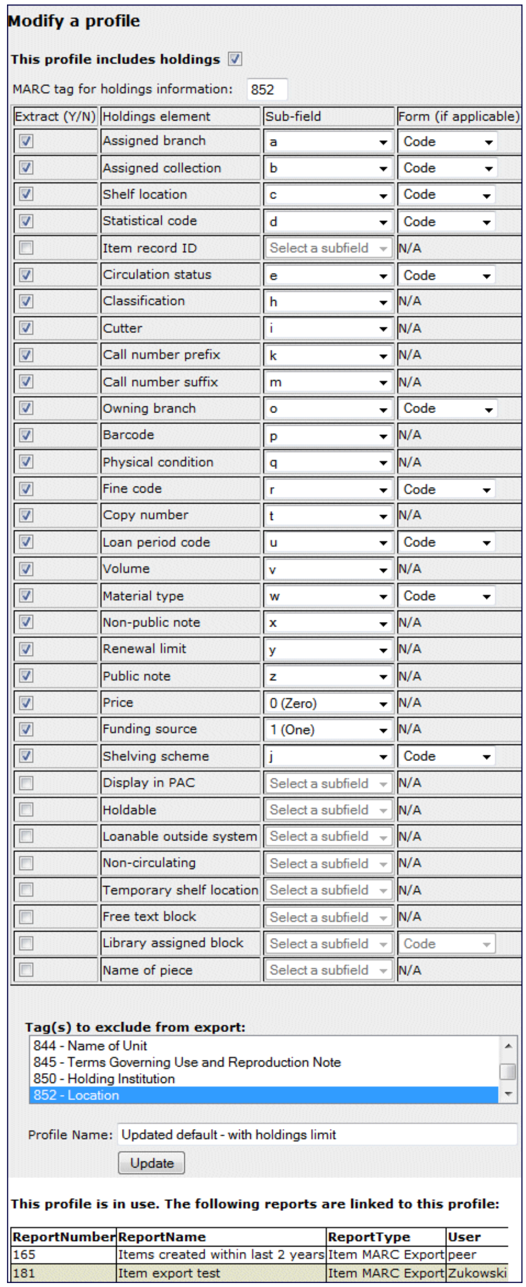
Related Information

- "Using Saved Reports" on page 36
- "Maintaining Scheduled Jobs" on page 51

Default Holdings Data in 852 Tags

When you export bibliographic records including holdings data and you do not use a custom profile to define the tag and subfields, an 852 tag is added for each item record attached to the bibliographic record, and the item data is mapped to the subfields in the 852 tag as follows:

Note:
You can change this profile as needed.



Modify a profile

This profile includes holdings ☑

MARC tag for holdings information: 852

Extract (Y/N)	Holdings element	Sub-field	Form (if applicable)
☑	Assigned branch	a	Code
☑	Assigned collection	b	Code
☑	Shelf location	c	Code
☑	Statistical code	d	Code
☐	Item record ID	Select a subfield	N/A
☑	Circulation status	e	Code
☑	Classification	h	N/A
☑	Cutter	i	N/A
☑	Call number prefix	k	N/A
☑	Call number suffix	m	N/A
☑	Owning branch	o	Code
☑	Barcode	p	N/A
☑	Physical condition	q	N/A
☑	Fine code	r	Code
☑	Copy number	t	N/A
☑	Loan period code	u	Code
☑	Volume	v	N/A
☑	Material type	w	Code
☑	Non-public note	x	N/A
☑	Renewal limit	y	N/A
☑	Public note	z	N/A
☑	Price	0 (Zero)	N/A
☑	Funding source	1 (One)	N/A
☑	Shelving scheme	j	Code
☐	Display in PAC	Select a subfield	N/A
☐	Holdable	Select a subfield	N/A
☐	Loanable outside system	Select a subfield	N/A
☐	Non-circulating	Select a subfield	N/A
☐	Temporary shelf location	Select a subfield	N/A
☐	Free text block	Select a subfield	N/A
☐	Library assigned block	Select a subfield	Code
☐	Name of piece	Select a subfield	N/A

Tag(s) to exclude from export:
844 - Name of Unit
845 - Terms Governing Use and Reproduction Note
850 - Holding Institution
852 - Location

Profile Name: Updated default - with holdings limit

Update

This profile is in use. The following reports are linked to this profile:

ReportNumber	ReportName	ReportType	User
165	Items created within last 2 years	Item MARC Export	peer
181	Item export test	Item MARC Export	Zukowski

MARC to Dublin Core Crosswalk

When you save a file in Dublin Core format using Export Express, Polaris uses the following Unqualified Dublin Core Crosswalk to map MARC fields to Dublin Core elements.

MARC Fields	Dublin Core Element	Notes
100, 110, 111, 700, 710, 711, 720	Contributor	
651, 662, 751, 752	Coverage	
	Creator	Creator element not used
008/07-10, 260cg	Date	
500-599 (except 506, 530, 540, and 546)	Description	
340, 856$q	Format	
020$a, 022$a, 024$a, 856$u	Identifier	
008/03-37, 041abdefghj, 546	Language	
260ab	Publisher	
530, 760-787ot	Relation	
506, 540	Rights	
534$t, 786$o$t	Source	
050, 060, 080, 082, 600, 610, 611, 630, 650, 653	Subject	
245, 246	Title	Repeat dc: title for each. Some applications may wish to include 210, 222, 240, 242, 243, and 247
Leader 06, Leader 07 655	Type	The type depends on the value in the Leader /06 and Leader /07. See the table below.

Leader /06 Value	Leader 07 Value	Type
a, c, d, t		text
e, f, g, k		image
i, j		sound
m, o, p, r		no type provided
p	c, s	collection

Using Saved Reports

From the **My reports** subtab, you can select your reports by type, then run them or schedule them to run at library-defined intervals. To make your reports available to other staff members, you can publish SimplyReports list and count reports to the **Custom** folder in the staff client's Polaris Reports window. Statistical reports and Export Express files cannot be published to the Custom folder in Polaris Reports. The report name and description, the creation date, last run date, and username appear in the list. When you edit saved reports, only the columns selected for output, the columns selected for sorting, the file type, and the assigned branch can be changed; the filters cannot be changed.

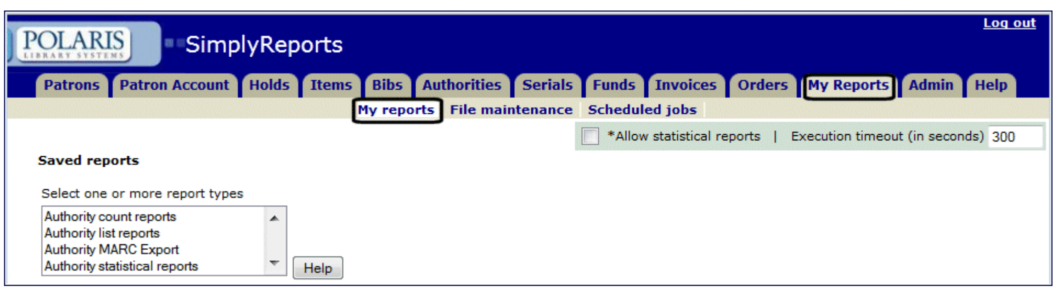
Schedule saved reports

Follow these steps to schedule one or more saved reports to run automatically.

Note:
For scheduled jobs to run successfully, the Polaris scheduling executive executable must be installed and running on the appropriate server. Contact your Polaris Site Manager if you need more information.

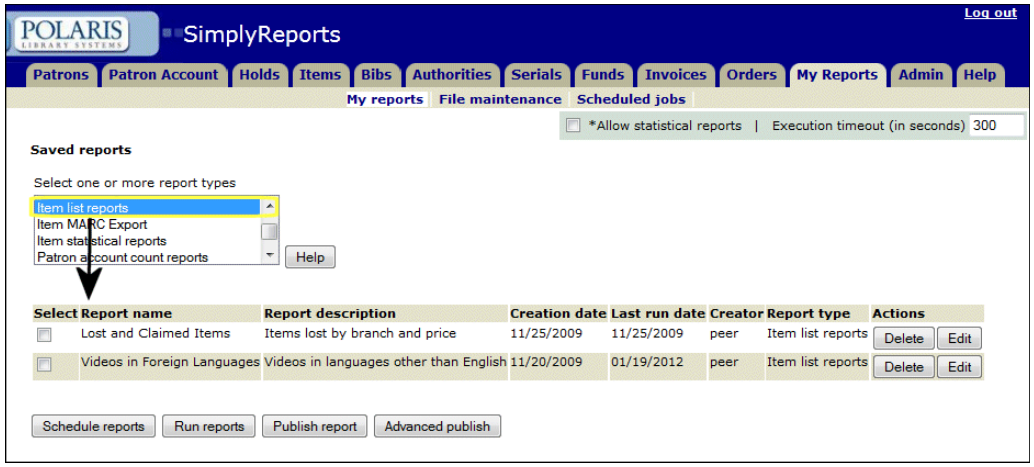
1. Select the My Reports tab.

   The My reports subtab page appears.



2. Select the report type or types in the **Select one or more report types** list box.

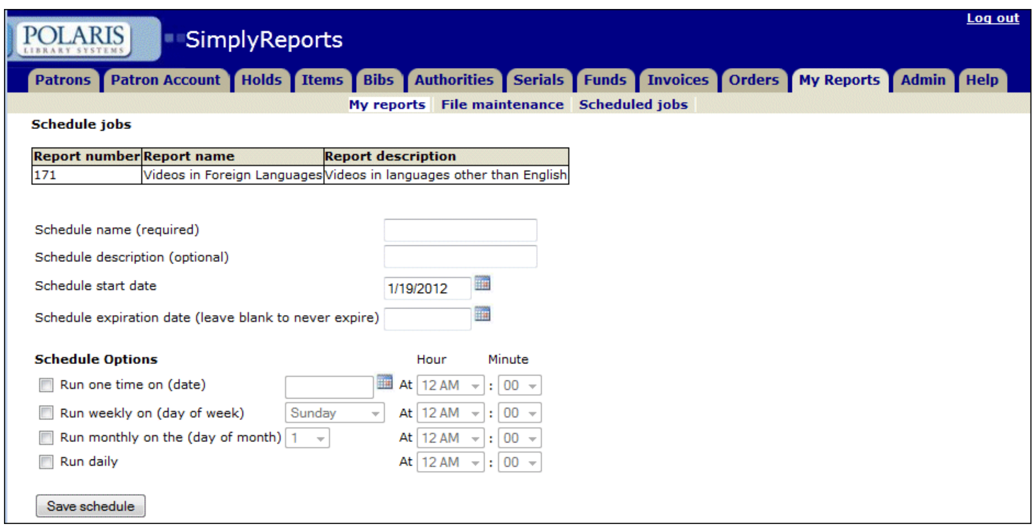
   The saved reports of the type you selected, and to which you have access, are listed.



3. Select the reports by clicking the check box next to the report name in the **Select** column.

4. Click Schedule reports .

   The **Schedule jobs** page appears.



5. Type a name for the schedule in the **Schedule name (required)** box.

6. To enter a description for the schedule, type it in the **Schedule description (optional)** box.

7. Click and select the date to start the report schedule in the **Schedule start date** box.

8. Click the calendar icon and select the date to end the schedule in the **Schedule expiration date (leave blank to never expire)** box. To keep running the schedule indefinitely, leave the expiration date blank.

9. Choose one of the following options for running the report:

- **Run one time on (date)** - This option runs the schedule once on a certain date at a certain time, and then automatically stops. Select a date using the calendar icon, and select a time using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.
- **Run weekly (on day of week)** - This option runs the schedule weekly on a certain day of the week at a certain time of day. Select the day of the week, and select a time using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.
- **Run monthly on the (day of month)** - This option runs the schedule monthly on a specific day of the month. Select the day of the month and select a time using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.
- **Run daily** - This option runs the schedule every day at a certain time of day. Select the time of day using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.

10. When you are finished setting up a schedule, click Save schedule.

    The selected reports will run according to the schedule you specified.

    Note:
    If you have the required permission, you can edit or delete scheduled jobs on the Scheduled jobs subtab. See “Maintaining Scheduled Jobs” on page 51.

Run saved reports

Follow these steps to run a saved report.

Note:
To run a statistical report, you must first select the **Allow statistical reports** box. It is preferable to schedule large statistical reports to run after hours because they may slow performance time for regular library activities.

1. Select the My Reports tab, and select the My reports subtab.
2. Select the saved report type or types in the **Select one or more report types** list box.

   The saved reports of the type you selected, and to which you have access, are listed.

3. Select the reports by clicking the check box next to the report name in the **Select** column.
4. Click Run reports.

   A window briefly appears with the message **Processing request. Please wait**. If you have selected more than one report to run, they run in the sequence in which you selected them.

   When the reports are finished running, the report number, report name, and report description appear in the list.

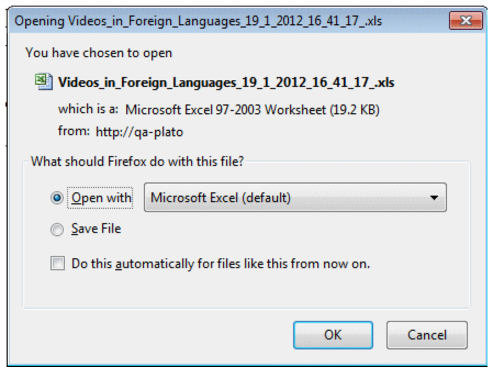
5. Click the link in **To download the report click here**.

If the report file is large, you may see the following message:

Large file warning:
The file you are attempting to download is 9465.39 KB long.
If you wish to continue with this download, click here.
If the link (above) does not work, contact your system administrator for assistance.
For your information the UNC path of this file is:
\\QA-PLATO2\C$\ProgramData\Polaris\4.1\SRSERVICEROOT\QA-Plato\909\savedreports\Videos_in_Foreign_Languages_19_1_2012_16_27_25_.xls

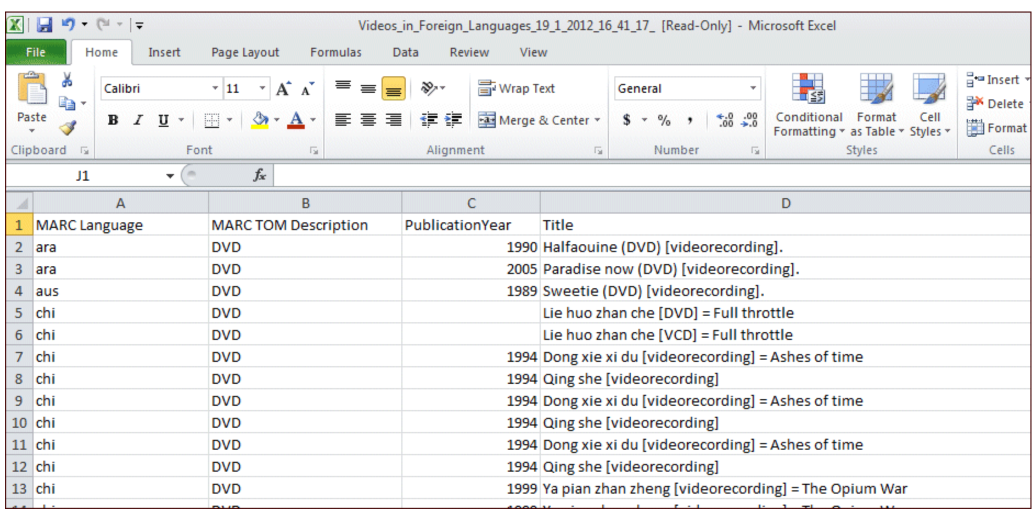
If the large file warning message appears, and you want to continue downloading click the link (**click here**) in the warning message.

If the file is not too large, a dialog box appears where you can verify the format in which you want to open the report.



6. Click **OK** to download the report in the format displayed in the **Open with** box. If you want to change the format, select a different option in the **Open with** box.

The report appears in the selected format.



Edit a saved report

You can edit saved list and count reports by changing the columns selected for output, the columns selected for sorting, the file type, and the assigned branch. Statistical reports cannot be edited.

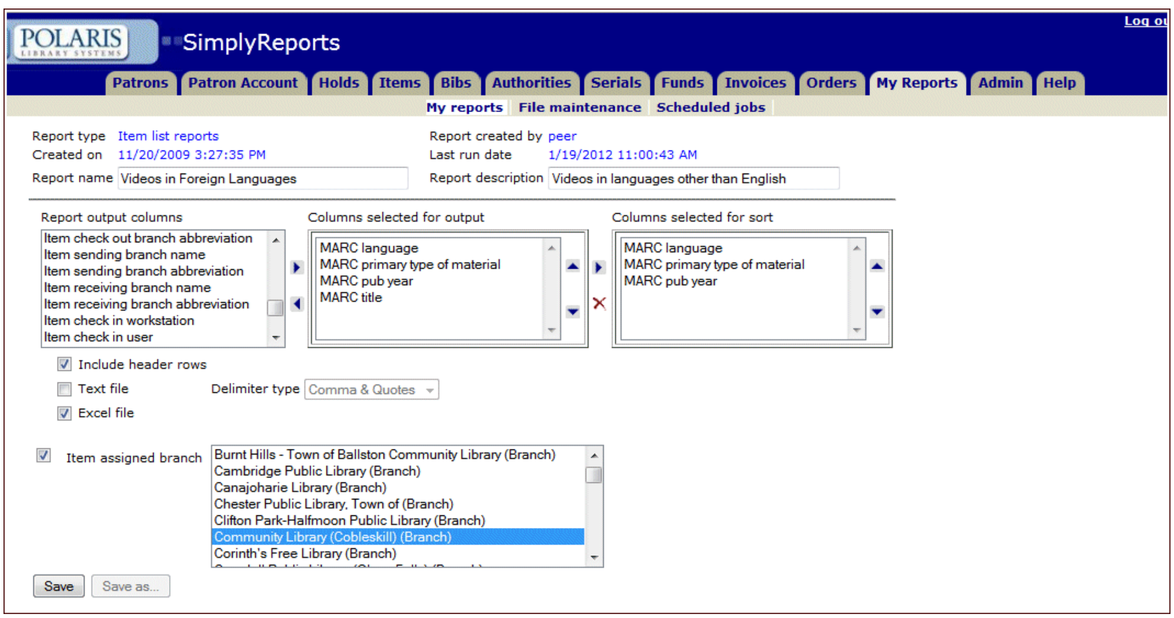
Follow these steps to edit a saved report.

> **Note:**
> When you edit a saved list or count report, you cannot select different filters.

1. Select the My Reports tab, and select the My report subtab.
2. Select the type of report you want to edit in the **Select one or more report types** box.

   The reports of this type are listed.
3. Select the check box next to a report in the list of saved reports.
4. Click Edit under **Actions**.

   The report options that you can change appear in a window.



5. Choose from the following options to edit the report:
   - Type a new name for the report in the **Report name** box.
   - Type a new description for the report in the **Report description** box.
   - Add more data columns to the report - Select one or more entries from the **Report output columns** list, and double-click or click the right-arrow button to move the entries into the **Columns selected for output** list.
   - Remove data columns from the report - Select the entry or entries in the **Columns selected for output** list, and click the left-arrow button to move the column back to the **Report output column** list.

- Add columns to be sorted - Select the columns in the **Columns selected for output** list, and double-click or click so they appear in the **Columns selected for sort** list.
- Remove columns from sorting - Select the entry in the **Columns selected for sort** list, and click .
- Change the setting for header rows on the report - Select or de-select **Include header rows**.
- Change the report output file type - Select **Text file** or **Excel file**. If you select **Text file**, select an entry in the **Delimiter type** box.
- Change any other options applicable to the type of report.

6. Click **Save** to save the report with the same name, or click **Save as** if you renamed the report.

Delete saved reports

You can delete any report you have created. When you delete a report, it is removed from the schedules. Follow these steps to delete a saved report.

1. Select the My Reports tab, and select the My reports subtab.
2. Select the type of report you want to delete in the **Select one or more report types** box.

   The reports of this type are listed.
3. Select the check box next to a report in the list of saved reports.
4. Click Delete under **Actions**.

   A message asks if you are sure you want to delete the report.
5. Click **OK**.

   The report is deleted.

Publish saved reports to the Polaris Shortcut Bar

When you publish reports created in SimplyReports, they appear in the Custom folder when you select **Utilities, Reports and Notices** on the Polaris Shortcut Bar. You can publish one report at a time. If your server software is Microsoft® SQL Server® 2008 (version 10.x) or later, you can use the Advanced Publishing feature. See "Use Advanced Publishing to publish a custom report" on page 45.

Note:
You cannot publish statistical reports or reports in MARC format (Export Express) to the Polaris Shortcut Bar.

Follow these steps to publish a report to the Custom folder so that it is available from the Polaris Shortcut Bar.

1. Select the My Reports tab, and select the My reports subtab.
2. Select a list or count report type.

   The list of saved reports of this type appears.
3. Select the report you want to publish.
4. Click [Publish report].

   The Basic Publishing page opens.

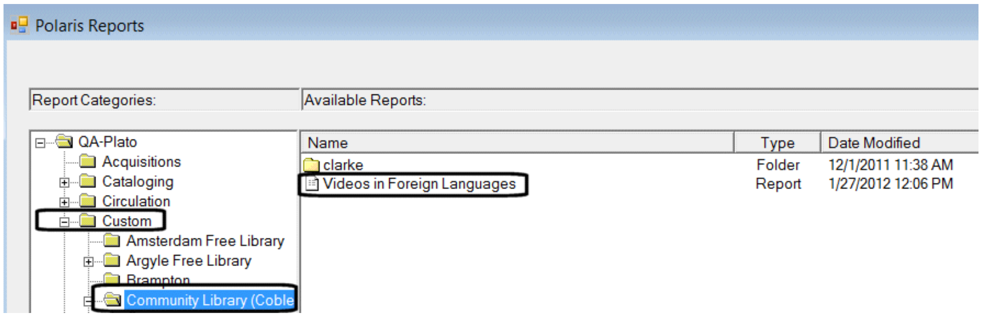
5. Select **Landscape** or **Portrait** to specify the report's orientation on the page.
6. Select a branch for the report in the **Branch to publish to** box.
7. Select **Personal folder** or **Branch folder** to indicate the custom folder in which to save the report.

   Note:
   To view the XML for the report, click **View XML**. The XML code for the report appears in the Report XML list. You can copy the data and use it in Reporting Services to customize the report. Click the browser back button to go back to the Publish area.
8. Click [Publish] to save the report in the Custom folder in the Reports list, available from the Polaris Shortcut Bar.

The message **Report Published** appears on the page.

9. Log in to the Polaris Staff Client and on the Polaris Shortcut Bar, select **Utilities, Reports and Notices**, and select the **Custom** folder.

   The report you published is listed.



Note:
After a report is published to the **Custom** folder in Polaris Reports and you edit it in SimplyReports, the changes do not affect the version in the Custom folder. Editing the report in the Custom folder has no effect on the SimplyReports report. To change the Custom report, you must either make changes to it in Reporting Services, or you must edit the report in SimplyReports and publish it with the same name so that it overwrites the old one in the Custom folder. When you publish a SimplyReports report to Reporting Services, the folder path is the following:
<Root folder>/Custom/<Branch name>/<NT User Name>/<report name>

Automatically e-mail a published report from Reporting Services

Follow these steps to automatically e-mail a published report.

1. Create a report using SimplyReports, save it and publish it. See "Publish saved reports to the Polaris Shortcut Bar" on page 42.

   Note:
   You can publish only list or count reports that are saved in Excel or Text format.

2. Open the Report Manager Web page on the Reporting Services server.
3. Navigate to the report you want to e-mail, and run it.
4. Click New Subscription.

   The Report Delivery Options page appears.

5. If it is not already selected, select **E-Mail** in the **Delivered by** box.
6. Type the e-mail address of the person to receive the automatic e-mails in the **To** box.

   Note:
   To enter more than one e-mail address, separate the addresses with semicolons.

7. Type your address in the **Reply-To** box.
8. Select the **Include Report** check box and leave the **Include Link** check box blank.
9. Select the format for the e-mailed report in the **Render Format** box (for example, **Excel**).
10. Click Select Schedule.

    The Schedule details page appears.

11. Select one of the following options for running and sending the report:
    - **Hour -** Run and send the report every day at a certain time interval, for example every 2 hours starting at 10:00 a.m. Type numbers in the **Hour** and **Minutes** boxes, specify the time to start the report in the **Start time** boxes, and select **A.M.** or **P.M.** The report will be e-mailed every day on the schedule you specified.
    - **Day -** Run and send the report on certain days of the week or on every weekday, or repeat the report after a certain number of days. To run and email the report on specific days of the week, select **On the following days**, and select the day or days of the week. Select **Every weekday** to run and e-mail the report every weekday. Select **Repeat after this number of days** and type the number of days if you want to run and e-mail the report and then repeat it a certain number of days later. For each option, specify what time of day you want the report to be run by typing the hour and minutes in the **Start time** box, and selecting **A.M.** or **P. M.**

- **Week** - Run and send the report on a weekly schedule. Select the number of weeks before you want the report to be sent again in the **Repeat after this number of weeks** box. Select the day or days of week on which you want to run the report. Specify what time of day you want the report to be run by typing the hour and minutes in the **Start time** box, and selecting **A.M. or P. M.**
- **Month** - Run and send the report monthly. Select the months in which you want the report run, and select the week of month and the day of week. Or select **On calendar day(s)** and type a number or a number span in the box to indicate the days of the month on which you want the report run. For example, if you type **1, 3-5** the report will be run on days 1, 3, 4, and 5 of each month. In the **Start time** boxes, type numbers to indicate the hour and minutes, and select **A.M.** or **P.M.** The report will be run at the time you set on the days of the week or calendar days you specified.
- **Once** - Run and send the report once.

12. Select the date from the calendar in the **Begin running this schedule on** box.
13. Select the date from the calendar in the **Stop running this schedule on** box.

> **Note:**
> The end date is optional. If you do not specify an end date, the schedule keeps running.

1-2-3

Use Advanced Publishing to publish a custom report

If your server software is Microsoft SQL Server 2008 (version 10.x) or later, you can use the Advanced Publishing feature to edit and publish a custom report. For more information on this feature, see "Scheduling and Publishing Reports" on page 25.

Follow these steps to publish a custom report to the Polaris Shortcut Bar using the Advanced Publishing feature in SimplyReports.

> **Note:**
> You cannot publish statistical reports or reports in MARC format using Advanced Publishing.

1. Select the My Reports tab, and select the My reports subtab.
2. Select a list, count, or summary report type or types.

   The list of saved reports of the selected type or types appears.
3. Select the report you want to publish to make it available from the Polaris Shortcut Bar.
4. Click Advanced publish.

   The Advanced Publishing window appears.

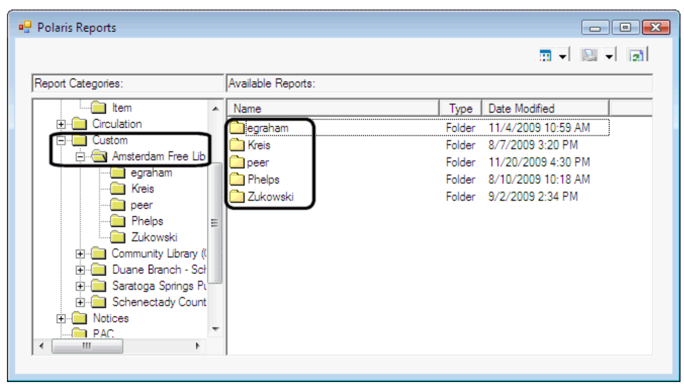
5. To change the name of the report, type a different name over the displayed name in the **Report name** box.

6. To change the description of the report, type a different description over the text displayed in the **Report Description** box.

7. Select **Landscape** or **Portrait** in the **Report orientation** box.

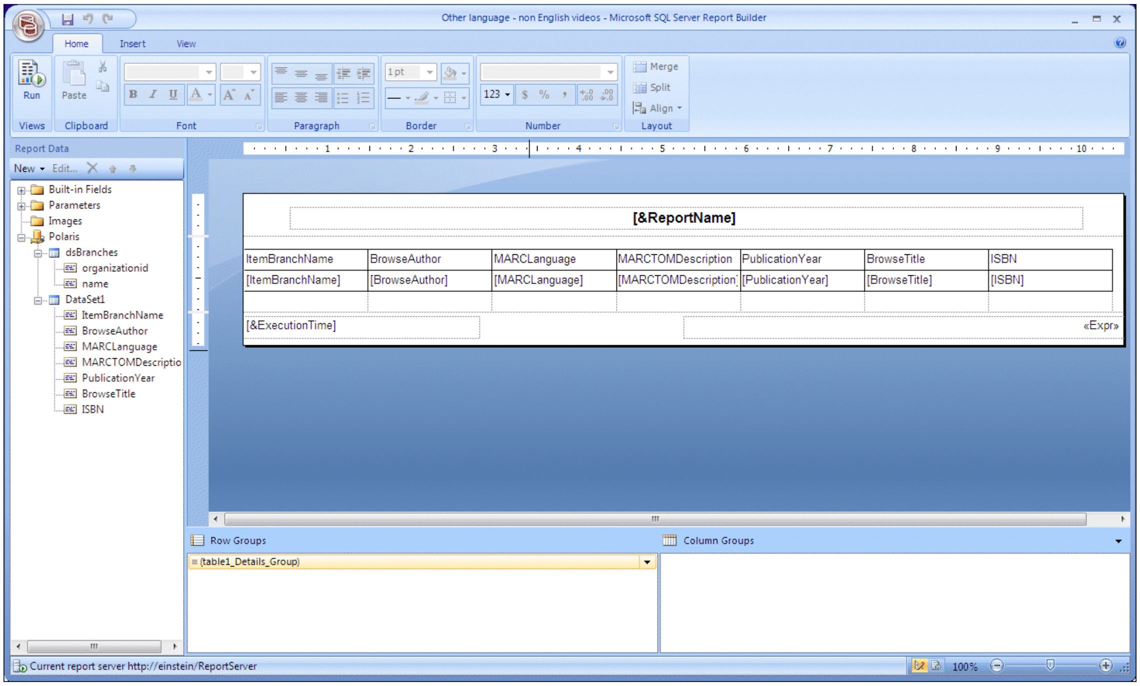
8. In the **Branch to publish to** box, select the branch subfolder under which you want the custom report to appear in the Polaris Reports window.

9. Select **Personal folder** or **Branch folder** to specify whether you want the report to appear in your own folder, or in the branch folder. If you select **Personal folder**, when the report is published, it will appear under the branch subfolder in a folder named with your user name.



10. Click Publish.

The Microsoft SQL Server Report Builder window appears.



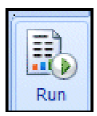
11. Make changes to the report. For example, you could change the column headings, the report name, the font, and the text color and point size.

Tip:

Click  in the Report Builder window to get online Help for the Microsoft SQL Server Report Builder application.

Tip:
A branch list box does not appear for Bib list and count reports, Authority list and count reports, and Fund list and Fund summary reports.

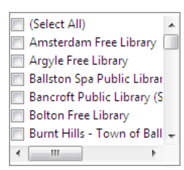
Tip:
Even if you used a branch filter when you created the report in SimplyReports, the entire branch list appears in Report Builder.

12. Click 

to preview the report.

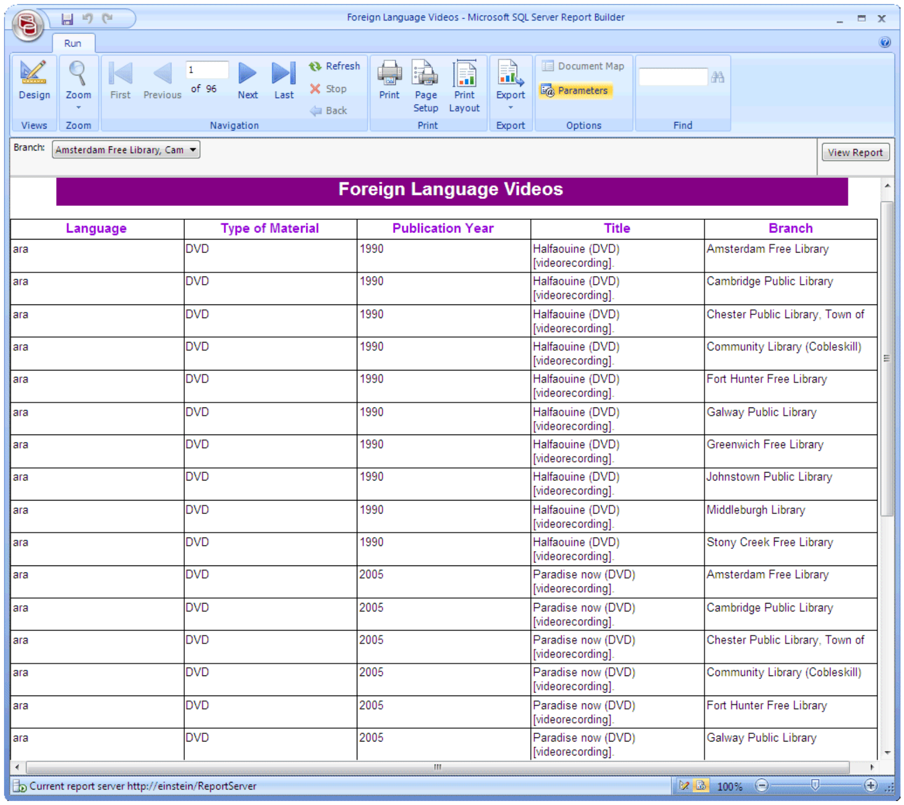
Another window appears where you select the branch or branches for the report.

13. If the report type requires that you set branch parameters, select the branches in the **Branch** drop-down list box. Choose **(Select All)** to include information from all branches in the report.



14. Click 

to preview the report in Report Builder.



Foreign Language Videos

Language	Type of Material	Publication Year	Title	Branch
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Amsterdam Free Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Cambridge Public Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Chester Public Library, Town of
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Community Library (Cobleskill)
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Fort Hunter Free Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Galway Public Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Greenwich Free Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Johnstown Public Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Middleburgh Library
ara	DVD	1990	Halfaouine (DVD) [videorecording]	Stony Creek Free Library
ara	DVD	2005	Paradise now (DVD) [videorecording]	Amsterdam Free Library
ara	DVD	2005	Paradise now (DVD) [videorecording]	Cambridge Public Library
ara	DVD	2005	Paradise now (DVD) [videorecording]	Chester Public Library, Town of
ara	DVD	2005	Paradise now (DVD) [videorecording]	Community Library (Cobleskill)
ara	DVD	2005	Paradise now (DVD) [videorecording]	Fort Hunter Free Library
ara	DVD	2005	Paradise now (DVD) [videorecording]	Galway Public Library

15. To change the report, click 

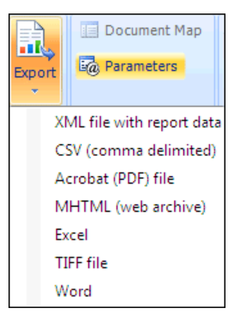
to return to the Design view.

16. Click .

    The report is saved with the changes you made in Report Builder, and it is available from the Polaris Shortcut Bar, under **Utilities, Reports and Notices** in the **Custom** folder, under the branch you specified. If you saved it to a personal folder, it appears in the branch folder in a subfolder with your Polaris user name.

Tip:
When you select a custom report from the Polaris Shortcut Bar, you can select only one organization (branch) from the list. To produce a report for multiple branches or all branches, you can export or print the report directly from Report Builder.

17. To export the report from Report Builder, click **Export** and select the file type in which you want to save the report.



18. To print the report from Report Builder, click 

.

Maintaining SimplyReports Files

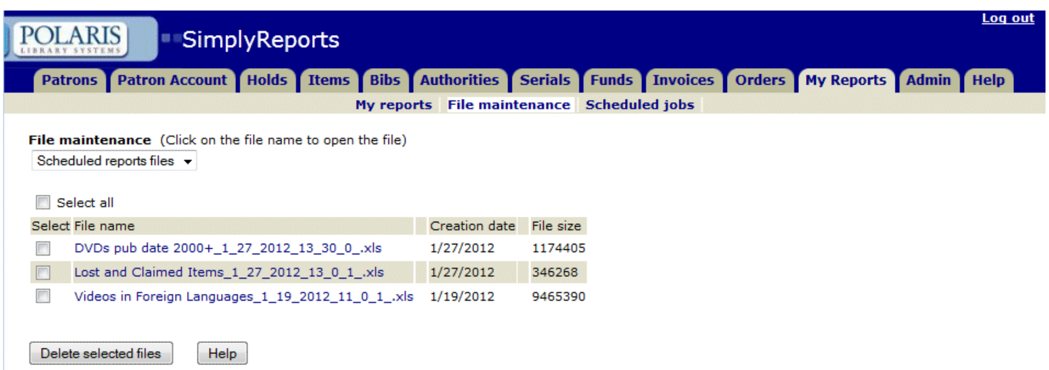
Use the File maintenance subtab on the My Reports tab to delete reports that are no longer needed. When a report is run, the report output files are saved both for named saved reports and for the ad hoc reports that are run without saving the report parameters.

Open a saved report file

Follow these steps to open a saved report.

1. Select the My Reports tab, and select the File maintenance subtab.
2. Select one of the following types of report files in the **File maintenance** box.
   - **Ad hoc reports files** - Files created when a report is run but not saved.
   - **Saved reports files** - Files created when the report output is saved.
   - **Scheduled reports files** - Files created when a scheduled report is run.

   The selected type of report files appear.



3. Click the report file name to open the report.

   The report appears in the file format selected when the report was created.

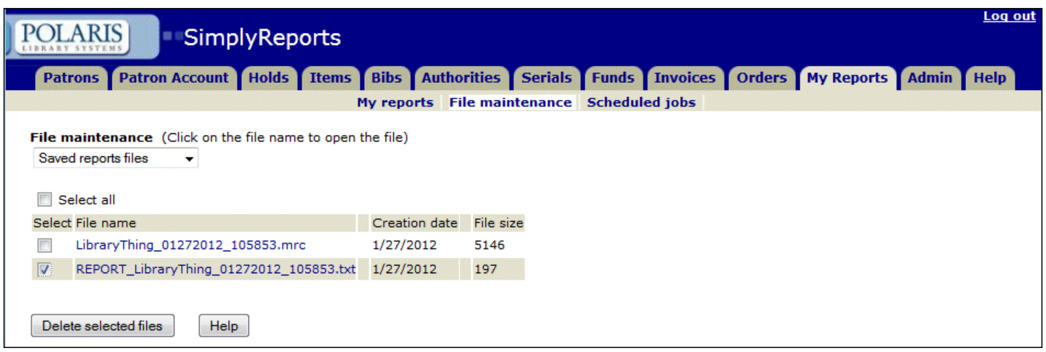
Delete report files manually

Follow these steps to delete reports.

Note:
When you delete saved reports, the generated report files are deleted, but the report parameters are saved. You can also set a number of days after which report files should be deleted automatically. See "Set general SimplyReports application defaults" on page 63.

1. Select the My Reports tab and select the File maintenance subtab.
2. Select one of the following types of report files in the **File maintenance** box.
   - **Ad hoc reports files** - Files created when a report is run but not saved.
   - **Saved reports files** - Files created when the report output is saved.
   - **Scheduled reports files** - Files created when a scheduled report is run.

   The saved reports of this type are listed.



3. Select the check box next to the report file or files you want to delete, or click **Select all** to select all the files in the list.
4. Click **Delete selected files**.

   The files are deleted.

Maintaining Scheduled Jobs

The Scheduled jobs subtab of the My Reports tab shows the scheduled jobs that were created. You can view the jobs according to the type of schedule: daily, weekly, monthly, or one-time schedules. If you have the required permission, you can also edit or delete a scheduled job.

View details of a scheduled job

The scheduled job list displays the schedule's name, description, the schedule in which it is run, the date it was created, the status (if it has been run already), when it began, and when it was last run. Follow these steps to view your scheduled report jobs.

1. Select the My Reports tab, and select the Scheduled jobs subtab.
2. Select a type of scheduled job from **Scheduled jobs** list.

   The scheduled jobs that are set to run according to this schedule appear in the list.
3. Click [+] next to the schedule to see the reports that are scheduled to run using this scheduled job.

   For each report using this schedule, the report number, name, report type, and last run date are listed.

Delete a scheduled job

When you delete a scheduled job, the reports will no longer be associated with the schedule, but the reports are not deleted. Follow these steps to delete a scheduled job.

1. Select the My Reports tab, and select the Scheduled jobs subtab.
2. Select the type of scheduled job from the **Scheduled jobs** list.

   The jobs that are set to run according to this schedule appear in the list.
3. Select the scheduled job that you want to delete.
4. Click **Delete**.

   A message box appears asking if you want to delete the job.
5. Click **OK**.

   The scheduled job is deleted.

1-2-3

Edit a scheduled job

You can edit a scheduled job to add more reports to the schedule, remove reports from the scheduled job, change the scheduled job's name, change the scheduled job's start or end dates, or change job options. Follow these steps to edit a scheduled job.

1. Select the My Reports tab, and select the Scheduled jobs subtab.
2. Select the type of scheduled job from the **Scheduled jobs** list.

   The jobs that are set to run using this schedule appear in the list.
3. Select the scheduled job that you want to edit.
4. Click **Edit**.

   A message box asks if you want to edit the job.
5. Click **OK**.

   The **Edit scheduled job** window appears showing the reports that are included in this scheduled job and the options that you can change.
6. Edit the scheduled job as follows:
   - To add another report to the scheduled job, select a report type from the **Report types** column, select the report to add in the **Available reports** list, and click . The report appears in the **Reports run by this schedule** column.
   - To remove reports from the scheduled job, select the report or reports you want to remove, and click . The report is removed from the scheduled job.
   - To change the scheduled job's name and description, type another name and description in the **Schedule name** and **Schedule description** boxes.
   - To change the scheduled job's start date, select a different date in the **Schedule Start date** box.
   - To change the schedule's expiration date, type a different end date in the **Schedule Expiration date** box.
   - To change when the scheduled job is run, select one of the following options:

     Run one time on (date) - Runs the scheduled job once on a certain date at a certain time, and then automatically stops. Select a date in box and select a time using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.

     Run weekly (on day of week) - Runs the scheduled job weekly on a certain day of the week at a certain time of day. Select the day of the week, and select a time using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.

Run monthly on the (day of month) - Runs the scheduled job monthly on a specific day of the month. Select the day of the month and select a time using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.

Run daily - Runs the schedule every day at a certain time of day. Select the time of day using the **At Hour** and **Minute** boxes. The minutes are in half-hour increments.

7. When you are finished editing the scheduled job, click **Save changes**.

Setting Up SimplyReports Security

Use the Security subtab to add SimplyReports users, remove users, specify the level of user, and specify which organizations' data the user is permitted to view. When you first add a SimplyReports user, the user has access to all SimplyReports functionality and data from all branches, libraries, and systems listed in the Polaris database. To limit the user's access to SimplyReports functionality, clear the appropriate check box. To limit a user's access to an organization's data, you can de-select a library or branch.

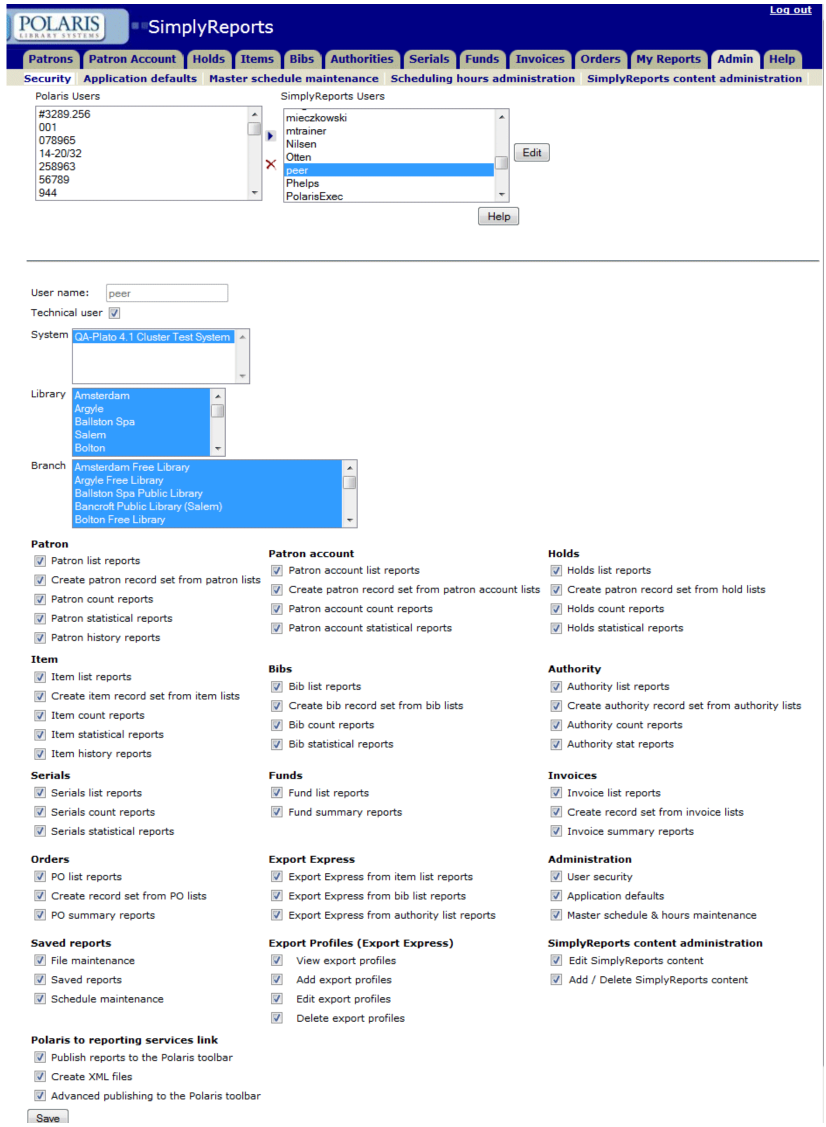
Add a new user or edit an existing user's permissions

You can add SimplyReports users from the list of available Polaris application users, and you can edit an existing user's access. Follow these steps to add or edit a SimplyReports user.

Tip:
Polaris users have staff records already set up in the Polaris staff client.

1. Select the Admin tab, and select the Security subtab.
2. Do one of the following steps:
   - If you are adding a new SimplyReports user, select the user in the **Polaris Users** box, and click to move the Polaris user into the **SimplyReports Users** box.
   - If you are editing an existing SimplyReport user's access, select the user in the **SimplyReports Users** box.
3. With the user selected, click Edit.

   The user's name appears in the **User name** box and the library system, libraries, and branches to which the user has access are highlighted.



4. Select **Technical User** if it is not already selected, or de-select it to specify the user as a Normal user.

   Note:
   You can set up report output columns to be displayed to Technical users, Normal users, or both. See "Managing Reports Content" on page 59.

5. Do the following steps to control the user's access to the organizations' data.

   Note:
   By default, a new SimplyReports user is granted access to all libraries and branches. To limit access, you can de-select a library or branch.

   a) De-select the library or libraries to which you want to prevent access in the **Library** box.

      The branches in the **Branch** box belong to the selected libraries.

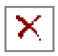
   b) Select the branch or branches to which you want to give the user access in the **Branch** box, or de-select the branches to which you want to prevent access.

Note:
By default, new users have access to all SimplyReports functions and all the check boxes are checked.

c) Clear a check box to prevent a user from using the function or accessing the report subtab. Check a box to allow the user access to the subtab and the ability to use the subtab's functionality.For information on specific permissions, click Help on the Security subtab.

Delete a SimplyReports user

Follow these steps to delete a user from SimplyReports.

1. On the Admin tab, Security subtab, select a user in the **SimplyReports Users** box.
2. Click .

   The user is removed from the SimplyReports Users list and no longer has access to any tabs in SimplyReports.

Setting Scheduling Hours

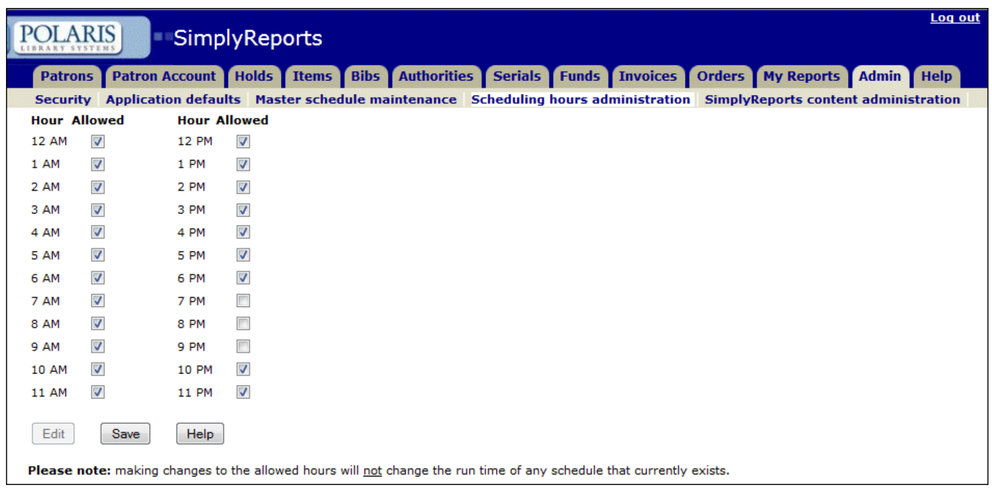
Use the Scheduling hours administration page to set the hours when reports can be run. Changes to this page do not affect reports that are already scheduled to run.

Specify the hours when reports can be run

Follow these steps to allow or disallow reports to run at specific hours of the day.

1. Select the Admin tab, and select the Scheduling hours administration subtab.

2. Click Edit at the bottom of the page to enable the check boxes.



3. Do one of the following:
   - To allow reports to run during the hour listed, select the check box in the **Allowed** column.
   - To prevent reports from running during the hour listed, clear the check box in the **Allowed** column.

   Note:
   Making changes to the allowed hours does not change the run time of any schedule that already exists.

4. Click Save.

Maintaining the Master Schedule

You can add reports to schedules, remove reports from schedules, and edit other schedule options on the Master schedule maintenance subtab on the Admin tab. Reports are scheduled on the My Reports tab. See “Schedule saved reports” on page 36.

Edit a report schedule

Follow these steps to add or delete reports from the schedules.

1. Select the Admin tab, and select the Master schedule maintenance subtab.
2. Select the type of report schedule in the **All scheduled jobs** list.

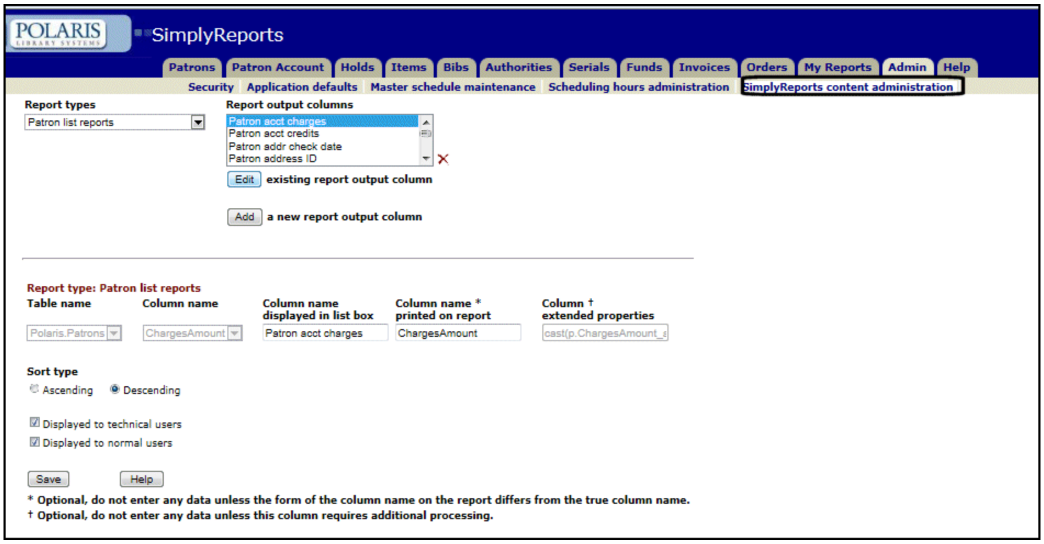
   Depending on your selection, the scheduled jobs that are set to run daily, weekly, monthly, or once appear in the list.
3. To see the reports that share this schedule, click .
4. Click **Edit** in the same row as the schedule you want to change.

   A message asks if you are sure you want to edit the schedule.
5. Click **OK**.

   The Edit scheduled job page lists the reports run by this schedule.
6. Edit the schedule as follows:
   - **Add reports to the schedule** - Select the type of report in the **Report types** box, select the report in the **Available reports** box, and click . The report is added to the schedule.
   - **Remove reports from the schedule** - Select the report in the **Reports run by this schedule** box, and click . The report is removed from the schedule, but the report itself is still saved.
   - **Change the name of the schedule** - Type a name in the **Schedule name** box.
   - **Change the description of the schedule** - Type a name in the **Schedule description** box.
   - **Change the schedule’s start date** - Select a different date in the **Start date** box.
   - **Change the date for the schedule to stop** - Select a different date in the **Schedule expiration date**.
   - **Change the schedule for running the report** - Change the settings under **Schedule Options** to change the date, day of week, day of month, and times for the report to run. See “Schedule saved reports” on page 36.

Managing Reports Content

Use the SimplyReports content administration subtab to specify the column names for certain types of reports. You can add new columns, change existing column headings to be easier for your staff to understand, and set the default sort order (ascending or descending) for each column. It is not possible to add or edit report output columns for Patron account count reports, Item or Patron history reports, or any type of statistical report.



Add a new report output column

Follow these steps to add a new output column for creating a report.

Note:
For a list of all the database columns available in SimplyReports, see "Database Columns" on page 100.

1. Select the Admin tab and select the SimplyReports content administration subtab.
2. Select the type of report in the **Report types** box.

   The report output columns that apply to this type of report are listed in the **Report output columns** box.
3. Click **Add** to add another column to the list for that type of report.

   The **Table name** lists and the **Column name** lists appear for the type of report.
4. Select the name of the database table that contains the data category in the **Table name** box, and select the name in the **Column name** box.
5. Type the name you want to display in the list box for that column in the **Column name displayed in list** box.
6. If you want the column name printed on the report to be different from the name displayed in this box, type a different name in the **Column name printed on report** box. You cannot enter spaces, but after the report is generated, you can change the column headings.

Tip:
If the **Column name printed on report** box is left blank, the name of the column in the database (**Column name**) will be printed on the report.

7. Select a sort order for the column, **Ascending** or **Descending**.
8. Select from the following options:
   - Select **Displayed to technical users** to make this database column available only to users designated as technical users.
   - Select the **Displayed to normal users** check box to make this database column available only to users designated as normal users.
   - Select both **Displayed to technical users** and **Displayed to normal users** to make this database column available to both.

   Note:
   For information on designating users as Normal or Technical users, see "Setting Up SimplyReports Security" on page 54.
9. Click **Save** to save the output column.

Edit a report output column

Follow these steps to edit a report output column.

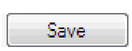
Note:
For a list of the database columns, see "Database Columns" on page 100.

1. Select the Admin tab and select the SimplyReports content administration subtab.
2. Select the type of report in the **Report types** box.

   The report output columns that apply to this type of report are listed in the **Report output columns** box.
3. Select the column you want to change in the **Report output columns** box.
4. Click **Edit** to edit the selected database column name for that type of report.
5. If you want the column name to be displayed differently in the list box on the SimplyReports tab, type a different name in the **Column name displayed in list box** field.
6. If you want the column name to be displayed differently on the report, type a new name in the **Column name printed on report** box. You cannot enter spaces in the column name that prints on the report, but after the report is generated, you can put spaces in the column headings.

Tip:
The **Column extended properties** box is for future use.

7. Select **Ascending** or **Descending** to specify the sort order.
8. Select from the following options:
   - Select **Displayed to technical users** to make this database column available only to users designated as technical users.
   - Select the **Displayed to normal users** check box to make this database column available only to users designated as normal users.
   - Select both **Displayed to technical users** and **Displayed to normal users** to make this database column available to both technical and normal users.

   Note:
   For information on designating users as Normal or Technical users, see "Setting Up SimplyReports Security" on page 54.
9. Click 

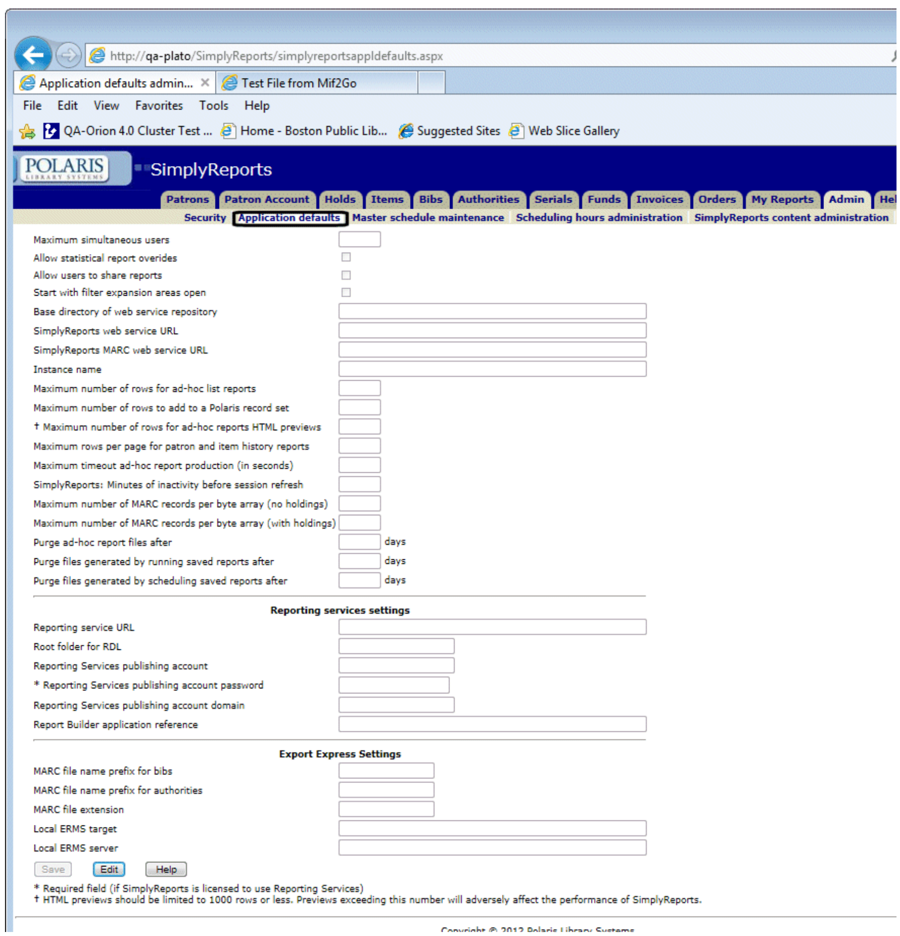
to update the output column selection.

Setting Application Defaults

Use the Application defaults subtab to specify defaults for the SimplyReports application. If you have a license for Export Express, you can also set defaults for Export Express.

To access the Application defaults subtab, select the Admin tab, and select the Application defaults subtab.

Important:
When you first access the Application defaults subtab, the options are unavailable (grayed out). You must click Edit at the bottom of the page to enable the options, enter a password in the **Reporting services publishing account password** box, and click Save to save your changes. To see your changes to the application defaults, you must log out of SimplyReports and log back in.



Set general SimplyReports application defaults

Follow these steps to set the general SimplyReports application defaults.

> **Important:**
> Do not change the default paths, URLs, instance name, folders or ERMS settings without contacting your Polaris Site Manager.

1. On the Application defaults subtab of the Admin tab, click Edit at the bottom of the page to enable the options.
2. Change the general application defaults as follows:
   - **Maximum simultaneous users** - Type a number in the box for the maximum number of staff members permitted to use SimplyReports at one time.
   - **Allow statistical report overrides** - Select the check box to allow users to select the **Run report now** check box on each of the statistical reports subtabs and the My reports tab. Ordinarily, statistical reports should be scheduled to run outside of normal library business hours because they may cause a system slowdown. Grant this permission to specific users to occasionally run statistical reports immediately.
   - (For future use) **Allow users to share reports**
   - **Start with filter expansion areas open** - By default this check box is checked, so filters are all open on all the SimplyReports tabs. Users will scroll to see all the filter options. You can uncheck this check box so the filters will be collapsed under headings, and users can click + to expand the filter options they want to use.

     > **Important:**
     > Do not change the Base directory, Web service URL, MARC Web service URL, or Instance name settings without consulting your Polaris Site Manager.

   - **Base directory of web service repository** - The file path for reports.
   - **SimplyReports web service URL** - The SimplyReports Web service URL.
   - **SimplyReports MARC web service URL** - The SimplyReports MARC web service URL.
   - **Instance name** - The instance name.
   - **Maximum number of rows for ad-hoc list reports** - The default and maximum number of rows that ad-hoc (not scheduled) list reports can have is 100,000, but you can enter a number less than 100,000. Excel allows a maximum of approximately 65,000 rows.
   - **Maximum number of rows for ad-hoc reports HTML previews** - The maximum number of rows that will display in the report preview for ad-hoc (not scheduled) reports. You can type a different number of rows, but exceeding the default of 1,000 rows in the preview can adversely affect the performance of SimplyReports. For more information, see "Preview a report" on page 20.

- **Maximum number of rows to add to a Polaris record set** - This is the number of rows of data (records) that can be added to a Polaris record set from SimplyReports results. The default is 1,000, but you can change this number by typing over it. Increasing this number can adversely affect SimplyReports performance.
- **Maximum rows per page for patron and item history reports** - This is the maximum number of rows of transaction data that can be on each page of a patron history or item history report. The default is 10 rows.
- **Maximum timeout ad-hoc report production (in seconds)** - This is the length of time the report will attempt to run before it times out. The default is 300 seconds or 5 minutes.

  Important:
  The IIS timeout settings must be at least as long as the **Minutes of inactivity before session refresh** setting. See "IIS Timeout Settings" on page 65.
- **SimplyReports - Minutes of inactivity before session refresh** - This is the length of time that a SimplyReports session can be open and inactive before the session is refreshed. The default is 60 minutes.

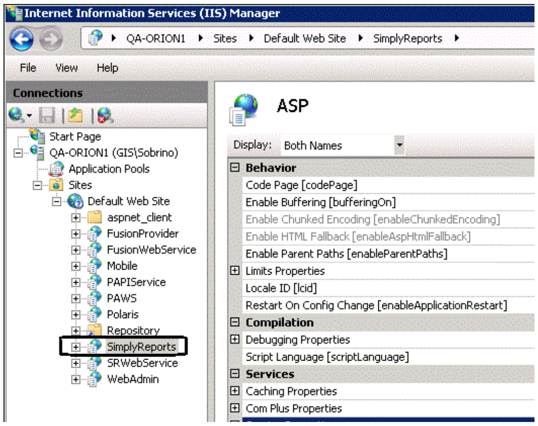
  Important:
  Do not change the maximum number of MARC records per byte array without contacting your Polaris Site Manager.
- **Maximum number of MARC records per byte array (no holdings)** - This is the maximum number of MARC records without holdings data allowed per byte array.
- **Maximum number of MARC records per byte array (with holdings)** - This is the maximum number of MARC records with holdings data allowed per byte array.
- **Purge ad-hoc report files after** - Type a number of days after which reports that were not saved for scheduling are deleted. These reports are usually created for a one-time use.
- **Purge files generated by running saved reports after** - Type a number of days after which reports that were generated from saved report parameters are deleted. This does not delete the report parameters; they can be used to generate other reports.
- **Purge files generated by scheduling saved reports after** - Type a number of days after which reports that were generated by scheduled saved reports are deleted. This does not delete the report parameters used to create a scheduled report; they can be used to generate other reports.

3. Enter a password in the **Reporting services publishing account password** box.
4. Click Save to save your changes.
5. Log out of SimplyReports and log back in to see your changes to the application.

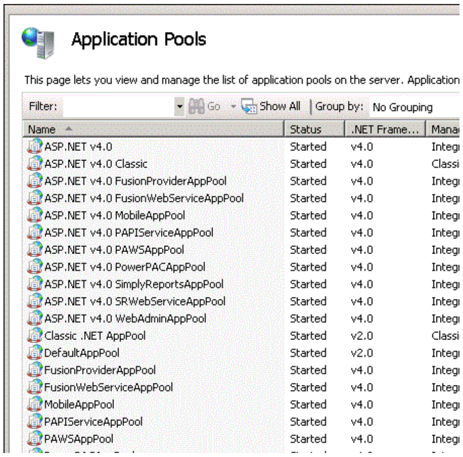
IIS Timeout Settings

The Internet Information Services (IIS) Manager setting for SimplyReports must be at least as long as the timeout setting in SimplyReports. If you need to change these settings, do the following:

1. In Internet Information Services (IIS) Manager, ASP Session Properties, change the default **Time-out** of **1** hour (**01:00:00**)



2. In Internet Information Services (IIS) Manager, SimplyReports Application Pool, Advanced Settings, Process Model, change the default **Idle Timeout** of **60** minutes.



Change Reporting Services settings

Important:
Do not change the Reporting Services settings without contacting your Polaris Site Manager.

Follow these steps if you need to change the Reporting Services defaults.

1. On the Admin tab, Application defaults subtab, click Edit at the bottom of the page to enable the options.
2. Change these Reporting Services settings, if necessary:
   - **Reporting services URL** - The default location on your network for Reporting Services: **http://<servername>/<reportserverinstance>**. Custom reports saved here are available in Polaris.
   - **Root folder for RDL** - The root folder for the Report Definition Language (RDL) publication defined in Reporting Services, usually **/polaris**.
   - **Reporting services publishing account** - Type the NT username required for publishing reports in Reporting Services.
   - **Reporting services publishing account password** - Type the NT password required for publishing reports in Reporting Services.
   - **Reporting services publishing account domain** - Type the domain of the NT services publishing account.
3. Enter a password in the **Reporting services publishing account password** box.
4. Click Save to save your changes.

Change Export Express settings

Important:
These settings apply only if your library is licensed to use Export Express. Do not make any changes to these settings without contracting your Polaris Site Manager.

Tip:
For more information on Export Express, see "Using Export Express" on page 27.

Follow these steps if you need to change the Export Express settings:

1. On the Admin tab, Application defaults subtab, click Edit at the bottom of the page to enable the options.
2. Change these Export Express settings, if necessary:
   - **MARC file name prefix for bibs** - Prefix for all MARC bib files.
   - **MARC file name prefix for authorities** - Prefix for MARC authority files.
   - **MARC file name extension** - The extension for all MARC files.
   - **Local ERMS target** - The name for the local ERMS target.
   - **Local ERMS server** - The name for the local ERMS server.
3. Enter a password in the **Reporting services publishing account password** box.
4. Click Save to save your changes.

Report Column & Filter Examples

The following table lists examples of the types of reports you can create in SimplyReports and shows the columns to select for the report output, the columns to sort, and the filters to limit the data in the report output.

Type of Report	*Columns for Output*	*Columns for Sort*	*Filters to Limit the Data*
Patron List Reports Examples			
Patrons with e-mail notification method but no mail address	Patron barcode Patron full name Patron code description	Patron full name	Patron general filters - Select patron branch Patron miscellaneous filters - Notification option - **Email address** Email address - **Not present**
Patron mailing list	Patron full name Patron street one Patron street two Patron city Patron state Patron postal code	Patron postal code Patron full name	Patron general filter - **Branch**
Patron Count Report Examples			
Total number of patrons added by branch in the last year	Patron branch name Patron code description	Patron code description	Patron general filter - Branch Patron date filters - Patron registration date - Select a from and to date range
Total number of patrons by a statistical class	Patron statistical class description	Statistical class description	Patron general filters - Branch

Type of Report	*Columns for Output*	*Columns for Sort*	*Filters to Limit the Data*
	Patron Account List Report Example		
List of patrons owing more than a certain amount of money	Patron full name Patron barcode Acct charges	Patron acct charges	Patron miscellaneous filters - Charges (amount) greater than or equal to - Specify a dollar amount
	Patron Account Count Report Examples		
Count of patron accounts sent to a collection agency for the year	Acct reason (or fee reason) Patron code description Sum balance (outstanding balance only)	Patron code description	Patron general filter - Reason (or fee reason) - Collection agency Transaction date filters - Transaction date - range Patron filters - Patron branch Outstanding balance options - Outstanding charges
Amount of outstanding charges by branch	Acct transacting branch name Patron code description Sum balance (outstanding balance only)	Account transacting branch name	Outstanding balance options - Outstanding charges
Amount of outstanding charges for overdue items	Acct transacting branch name Patron code description Sum balance (outstanding balance only)	Acct transacting branch name	Outstanding balance options - Outstanding charges Patron account general filters - Fee reason code - Overdue item
Payments taken for items from other branches	Acct payment method description Acct reason Acct transacting branch abbreviation Item branch abbreviation Item barcode Sum - transaction amount	Acct transacting branch abbrev Item assigned branch abbrev Acct payment method description	History options: Payment history Transaction date

Type of Report	Columns for Output	Columns for Sort	Filters to Limit the Data
	Holds List Report Examples		
Hold requests placed during the last month	Hold creation date Hold last status transition date Hold status description MARC browse author MARC browse title Item assigned branch abbreviation	Hold creation date Hold status description MARC browse author MARC browse title	Hold general filters - Pick up branch - Select branch Hold date filters - Hold creation date
	Holds Count Reports Examples		
Hold requests exceeding the number of available local copies	MARC browse author MARC browse title	MARC browse title	Hold general filters - Pickup branch - Select branch Hold date filters - hold creation date Optional - Select 'top' number___ most requested titles - Enter 100 Hold general filters - Pickup branch - Select branch
Top 100 requested titles of last month	MARC bibliographic record ID MARC browse author MARC browse title MARC primary type of material description		
Number of patrons that have the maximum number of hold requests placed	MARC browse title Patron full name		
	Item List Report Examples		
List of Spanish language items assigned to your branch	Item assigned collection name Item barcode Item call number MARC title MARC author	Item assigned collection name Item call number MARC author	Item general filters - Assigned branch - Select branch Bibliographic record filters - MARC record language - Select Spanish

Type of Report	*Columns for Output*	*Columns for Sort*	*Filters to Limit the Data*
Weeding list of non-fiction titles **(Titles have not circulated in the past 3 years and have a lifetime circulation less than 25.)**	Item call number MARC author MARC title Item barcode Item lifetime circ counts	Item call number MARC author	Item general filters - Collection - Select Non-fiction Item relative date filters - Last checkout or renewal more than 3 years before the report run date. Item circulation filters - Lifetime circ count less than or equal to 25
Items limited to patrons from your library **(Items added six months ago or more and can only be checked out by patrons belonging to your branch.)**	Item barcode Item assigned collection abbreviation Item call number MARC title Item creation date Item circ status Item material type	Item creation date Item assigned collection MARC title	Item relative Date filter: Creation date - More than 6 months before the report run date Item check box filters Patrons from this branch only checked
Item records without a price	Item barcode Item assigned collection Item call number MARC author MARC title Item circ status	Item creation date Item assigned collection Item YTD circ count MARC title	Item general filters - Assigned branch - Select branch Item check box filter - Price - Not present

Type of Report	*Columns for Output*	*Columns for Sort*	*Filters to Limit the Data*
Most popular items in a collection in the last year	Item assigned collection abbreviation Item call number MARC author MARC title Item last circ activity date Item YTD circ count	Item assigned collection abbreviation Item YTD circ count MARC title	Item date filters - Item last circ activity date - Select a from and to date to find items circulated within the last year; for example, 1/1/2011 - 1/1/212 Item circulation filters - YTD circulation count greater than or equal to - Type a number
	Item Count Reports		
Collection value **(Total dollar amount and count of all items in a collection.)**	Item assigned collection name Sum item price	Item assigned collection name	Item general filters - Assigned branch - Select the branch
Lost items value **(Total dollar amount and count of all items that have been lost at a certain branch, grouped by collection.)**	Item assigned collection Sum item price	Item assigned collection name	Item general filters - Assigned branch - Select the branch Circ status - Select Lost
Age of collection report **(Items published after 1992 with the number of items by publication year.)**	Item assigned collection MARC publication year	Item assigned collection MARC publication year	Item general filter - Assigned branch - Select the branch Bibliographic record filter - MARC publication year - From 1992 - To 2012
Count of items owned by the branch and collection	Item assigned branch abbreviation Item assigned collection name		

Filters

SimplyReports filters are used to limit the report output by specific criteria. Some filters are for the type of record in the report, while other filters are for records linked to the type of record in the report. For example, you can select item filters when creating item reports or invoice reports. In the case of invoice reports, the item filters limit the invoice data by the selected characteristics of the item records linked to that invoice. Many of these filters are available for multiple types of reports. For general information on applying filters, see "Apply filters to limit the report output" on page 16.

For information on specific types of filters, see:

- "Patron Filters" on page 73
- "Patron Account Filters" on page 76
- "Holds Filters" on page 76
- "Item Filters" on page 79
- "Bibliographic Record Filters" on page 84
- "Authority Record Filters" on page 86
- "Purchase Order Filters" on page 88
- "Invoice Filters" on page 91
- "Serials Filters" on page 94
- "Fund Filters" on page 98

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Filter Name	*Criteria Limiting Report Output*
Patron Filters	
These filters limit the data in the report output by characteristics of the patron record. (displayed in the Patron Registration workform).	
Patron general filters	
Patron record set	Patron records belonging to selected record set
Library quick pick	Automatically selects branches under the library. To exclude branches, press **Ctrl+click**.
Branch	Patrons registered at the selected branch.
Patron code	Patron records with the selected patron code. A branch must be selected.
Statistical class	Patron records with the selected statistical class. A branch must be selected.
Language	Patron records with the selected language.
Patron date filters and relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" on page 18.	
Registration date	*Date filter:* • Registration date between two dates • **Not present** - patron records without a registration date. *Relative date filters*: • Registration date between a specified number of days, months, or years ago and the report run date • Registration date more than a specified number of days, months, or years before the report run date
Update date	*Date filter:* • Update date between two dates • **Not present** - patron records without an update date. *Relative date filters*: • Update date between a specified number of days, months, or years ago and the report run date • Update date more than a specified number of days, months, or years before the report run date
Last activity date	*Date filter:* • Last activity date between two dates • **Not present** - patron records without a last activity date. *Relative date filters*: • Last activity date between a specified number of days, months, or years ago and the report run date • Last activity date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Expiration date	*Date filter:* • Expiration date between two dates • **Not present** - patron records without an expiration date *Relative date filters*: • Expiration date between a specified number of days, months, or years ago and the report run date • Expiration date more than a specified number of days, months, or years before the report run date
Birth date	*Date filter:* • Birth date between two dates • **Not present** - patron records without a birth date.
Patron miscellaneous filters	
Charges	Patron records with outstanding charge amounts greater than or equal to, or less than or equal to, the amount entered
Credits	Patron records with credit amounts greater than or equal to, or less than or equal to, the amount entered
Claims	Patron records with a claim count greater than or equal to, or less than or equal to, the amount entered
Lost items	Patron records with a lost item count greater than or equal to, or less than or equal to the amount entered.
YTD circ	Patron records with a circulation count for the present year (up to the present date) greater than or equal to, or less than or equal to, the amount entered
Lifetime circ	Patron records with a lifetime circulation count total greater than or equal to, or less than or equal to the amount entered
Gender	Patron records for male patrons/Patron records for female patrons
Notification option	Patron records with the selected notification option
Postal code range	Patron records with addresses within the postal code range
Email address - Present, Not present, Incorrectly formatted	Present - email address in record; Not present - no email address; Incorrectly formatted - Email address not formatted correctly
Alternate email address - Present, Not present, Incorrectly formatted	Present - alternate Email address in record; Not present - no alternate email address; Incorrectly formatted - alternate email address not formatted correctly
Address (of the type specified above)	Address type selected in **Address type to use** box - Present or Not present
Any address - Present, Not present	Present - address of any type present/ Not present - no address
Mobile phone - Present, Not present	Present - mobile phone number is in record/Not present - no mobile phone number
Mobile phone carrier - Present, Not present	Present - mobile phone carrier is in record/Not present - no mobile phone number
Telephone 1 - Present, Not present	Present - primary telephone number is in record/Not present - no primary telephone number

Filter Name	*Criteria Limiting Report Output*
Patron block and note filters	
Non-blocking notes	Patron records with non-blocking notes that match the text entered
Blocking notes	Patron records with blocking notes that match the text entered
Free text block	Patron records with free text blocks that match the text entered
Library assigned block	Patron records with library assigned blocks that match the selected block
System block	Patron records with system blocks that match the selected block
Patron free text message	Patron records with free text messages that match the text entered
Patron message	Patron message matches the selected message
Patron user defined fields filters	
(User 1) ____ Not present	User 1 field matches text entered, or user 1 not present in record
(User 2) ____ Not present	User 2 field matches text entered, or user 2 not present in record
(User 3) ____ Not present	User 3 field matches text entered, or user 3 not present in record
(User 4) ____ Not present	User 4 field matches text entered, or user 4 not present in record
(User 5) ____ Not present	User 5 field matches text entered, or user 5 not present in record
Patron ID filters	
Extract records between patron ID __ to ___	Patron ID within the specified range

Filter Name	*Criteria Limiting Report Output*
	Patron Account Filters
	These filters limit the report output by characteristics of the patron account record. (displayed in the Patron Status workform)
	Patron account general filters
Reason (or fee reason)	Patron accounts that include a fee with the selected fee reason
Method	Patron accounts where payments were made using this method
Library quick pick	Selects the branches associated with the library
Branch	Patron account transactions by the selected branch(es)
Transaction creator	Patron account transactions entered by the selected staff member(s)
Transaction workstation	Patron account transactions entered at the selected workstation
	Patron account miscellaneous filters
Transaction amount	Patron accounts with transactions greater than or equal to, or less than or equal to, the dollar amount entered
Charges	Patron accounts with charges greater than or equal to, or less than or equal to, the dollar amount entered
Credits	Patron accounts with credits greater than or equal to, or less than or equal to, the dollar amount entered
	Patron account transaction date filters & relative date filters
Transaction date	*Date filter:* • Transaction date between two dates *Relative date filters*: • Transaction date between a specified number of days, months, or years ago and the report run date • Transaction date more than a specified number of days, months, or years before the report run date
	Holds Filters
	These filters limit the report output by characteristics of the hold request record. (displayed in the Hold Request workform)
	Hold general filters
Library quick pick	Automatically selects all branches under selected library
Branch	Hold request pickup branch is selected branch
Hold status	Hold requests with selected status
Origin of request	Hold requests placed from PAC, staff client, NCIP, or none given
Borrower-by-mail requests	Hold requests specifically intended for borrow by mail.
Not Borrower-by-mail requests	Hold requests not including borrow by mail.
Item specific requests	Item-level hold requests
First available copy requests	Hold requests or first-available copy where Vol number is in item or item linked to serial issue with Designation data
Suspended requests	Hold requests that have been suspended
Unlocked requests	Hold request that are unlocked (typically for serial issues without linked items)

Filter Name	*Criteria Limiting Report Output*
Holds date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. *Relative date filters limit the report output by a time period relative to the report run date.* *For more information, see "Filter by Dates Relative to a Report Run Date"* ***on page 18****.*	
Activation date	*Date filter:* • Activation date between two dates *Relative date filters*: • Activation date between a specified number of days, months, or years ago and the report run date • Activation date more than a specified number of days, months, or years before the report run date
Creation date	*Date filter:* • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date
Notification date	*Date filter:* • Notification date between two dates *Relative date filters*: • Notification date between a specified number of days, months, or years ago and the report run date • Notification date more than a specified number of days, months, or years before the report run date
Hold till date	*Date filter:* • Hold til date between two dates *Relative date filters*: • Hold til date between a specified number of days, months, or years ago and the report run date • Hold til date more than a specified number of days, months, or years before the report run date
Last status transition date	*Date filter:* • Last status transition date between two dates *Relative date filters*: • Last status transition date between a specified number of days, months, or years ago and the report run date • Last status transition date more than a specified number of days, months, or years before the report run date
Expiration date	*Date filter:* • Expiration date between two dates *Relative date filters*: • Expiration date between a specified number of days, months, or years ago and the report run date • Expiration date more than a specified number of days, months, or years before the report run date
Hold filters for Hold count reports only	
Select top number ___ most requested titles	Top most requested titles equal to the number selected. For example, if you select 50, the report output is limited to the top 50 titles.

Filter Name	*Criteria Limiting Report Output*
Number of requests	Titles with hold requests greater than, Less than, or equal to the number specified
Number of holdable items Assigned branch	Titles with a number of holdable items greater than, less than, or equal to the number specified. Select a branch or branches to limit the number of holdable items by the assigned branch(es).
Holds statistical filters for Holds statistical reports	
Pickup branch	Number of hold requests with the selected pickup branch
Library quick pick	Selects the branches associated with the library
Branch	Number of hold requests for patrons registered at the selected branch(es). Include the branch name, abbreviation, or branch ID. Combine branch totals to total the numbers. Note: To limit the report output by patron code, you must first select a branch or branches. Only the patron codes used at the selected branches are available.
Destination branch	Number of hold requests with the selected destination branch
Patron code (available patron codes depend on the branch selected)	Number of hold requests by patrons with the selected patron codes. Include the patron code description or patron code ID. Combine patron code totals to total the numbers for all selected patron codes.

Filter Name	*Criteria Limiting Report Output*
Item Filters	
These filters limit the data in the report by characteristics of item records. (displayed in the Item Record workform)	
Item general filters	
Item record set	Items belong to the selected record set
Library quick pick	Automatically selects branches under the selected library. To exclude branches, press **Ctrl+click**.
Branch	Assigned branch matches a selected branch
Collection	Assigned collection matches a selected collection; if Not present is selected, the report output is limited to items without a collection
Creator	Created by selected user
Modifier	Modified by selected user
Donor	Donated by selected donor
Fine code	Fine code matches a selected fine code
Home branch	Home branch matches a selected branch
History action	Selected action is included in item history
Loan period code	Loan period matches selected loan period code
Material type	Material type matches type selected
Owner	Owner matches selected owner
Record status	Item record's status matches selected status
Shelf location	Shelf location matches selected location
Shelving scheme	Shelving scheme matches selected scheme
Stat code	Stat code matches selected stat code
Circ status	Circ status matches selected search status
Item date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" ***on page 18***.	
PO release date	*Date filter:* • Purchase order release date between two dates *Relative date filters*: • Purchase order release date between a specified number of days, months, or years ago and the report run date • Purchase order release date more than a specified number of days, months, or years before the report run date
Creation date	*Date filter:* • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Due date	*Date filter:* • Due date between two dates *Relative date filters*: • Due date between a specified number of days, months, or years ago and the report run date • Due date more than a specified number of days, months, or years before the report run date
First available date	*Date filter:* • First available date between two dates *Relative date filters*: • First available date between a specified number of days, months, or years ago and the report run date • First available date more than a specified number of days, months, or years before the report run date **Not present** limits the report output to items without a first available date.
Item record history transaction date *(Note: The transactions for the day on which the report is run are not included in the report output.)*	*Date filter:* • History transaction date between two dates *Relative date filters*: • History transaction date between a specified number of days, months, or years ago and the report run date • History transaction date more than a specified number of days, months, or years before the report run date
Imported date	*Date filter:* • Linked bib imported between two dates *Relative date filters*: • Linked bib imported between a specified number of days, months, or years ago and the report run date • Linked bib imported more than a specified number of days, months, or years before the report run date
In-transit received date	*Date filter:* • In-transit received date between two dates *Relative date filters*: • In-transit received date between a specified number of days, months, or years ago and the report run date • In-transit received date more than a specified number of days, months, or years before the report run date **Not present** limits the report output to items without an in-transit received date.
In-transit sent date	*Date filter:* • In-transit sent date between two dates *Relative date filters*: • In-transit sent date between a specified number of days, months, or years ago and the report run date • In-transit sent date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Last check in date	*Date filter:* • Last check in date between two dates *Relative date filters*: • Last check in date between a specified number of days, months, or years ago and the report run date • Last check in date more than a specified number of days, months, or years before the report run date **Not present** limits the report output to items without a last check in date.
Last check out or renewal date	*Date filter:* • Last check out or renewal date between two dates *Relative date filters*: • Last check out or renewal date between a specified number of days, months, or years ago and the report run date • Last check out or renewal date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to items without a last check out or renewal date.
Last activity date	*Date filter:* • Last activity date between two dates *Relative date filters*: • Last activity date between a specified number of days, months, or years ago and the report run date • Last activity date more than a specified number of days, months, or years before the report run date **Not present** limits the report output to items without a last activity date.
Last circ status change date	*Date filter:* • Last circulation status change date between two dates *Relative date filters*: • Last circulation status change date between a specified number of days, months, or years ago and the report run date • Last circulation status change date more than a specified number of days, months, or years before the report run date
Last inventory date	*Date filter:* • Last inventory date between two dates *Relative date filters*: • Last inventory date between a specified number of days, months, or years ago and the report run date • Last inventory date more than a specified number of days, months, or years before the report run date **Not present** limits the report output to items without an inventory date.
Last overdue notice date	*Date filter:* • Last overdue notice date between two dates *Relative date filters*: • Last overdue notice date between a specified number of days, months, or years ago and the report run date • Last overdue notice date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Modification date	*Date filter:* • Modification date between two dates *Relative date filters*: • Modification date between a specified number of days, months, or years ago and the report run date • Modification date more than a specified number of days, months, or years before the report run date
Record status date	*Date filter:* • Status update date between two dates *Relative date filters*: • Status update date between a specified number of days, months, or years ago and the report run date • Status update date more than a specified number of days, months, or years before the report run date
Item call number filters	
Prefix	Items with call number prefixes within the specified range
Classification number	Items with classification numbers within the specified range Not present limits the report output to items without a classification number.
Cutter	Items with cutter numbers within the specified range Not present limits the report output to items without cutter numbers.
Suffix	Items with a call number suffix within the specified range Not present limits the report output to items without a suffix.
Volume number	Items with a volume number within the specified range Not present limits the report output to items without a volume number.
Copy number	Items with a copy number within the specified range Not present limits the report output to items without a copy number.
Item block and note filters	
Library assigned block	Item has a library assigned block matching the specified text
System block	Item has a system block matching the specified block text
Non-public note	Item has a non-public note matching the specified text
Public note	Item has a public note matching the specified text
Physical condition	Item's physical condition matches the specified condition.
Item checkbox filters	
These filters limit the report output by the condition of specific check boxes on the Item Record workform - whether the box is checked or unchecked. Other filters limit by the presence or absence of price, call number, or funding source.	
Display in PAC checked	Items display in PAC
Display in PAC unchecked	Items do not display in PAC
Call number not present	Items without a call number
Call number present	Items with a call number
Holdable checked	Items are holdable
Holdable unchecked	Items are not holdable
Pickup at this branch not checked	Items that do not need to be picked up at a certain branch

Filter Name	*Criteria Limiting Report Output*
Pickup at this branch checked	Items must be picked up at a certain branch
Patrons from this branch only not checked	Items can be picked up by any patron
Patrons from this branch only checked	Items must be picked up by patrons registered at a certain branch
Patrons from this library and branches not checked	Items may be picked up by any patron
Patrons from this library and branches checked	Items must be picked up from a branch associated with the parent library
Preferred borrowers not checked	Items can be loaned to any borrower
Preferred borrowers checked	Items can be loaned only to preferred borrowers
Non-circulating not checked	Items circulate
Non-circulating checked	Items do not circulate
Exclude ILL items	Items are not interlibrary loan items; ILL check box is not checked
Show only ILL items	Items are interlibrary loan items; ILL check box is checked
Exclude items without barcodes	Items have a barcode
Show only items without barcodes	Items do not have a barcode
Price present	Items have a price
Price not present	Items do not have a price
Do not float unchecked	Items that can float via floating collections
Do not float checked	Items that do not float via floating collections
Funding source present	Items with a funding source
Funding source not present	Items without a funding source
Item record ID filters	
Extract records from item record ID to	Items with record IDs within the specified range

Filter Name	*Criteria Limiting Report Output*
Bibliographic Record Filters	
These filters limit the report output by characteristics of the bibliographic record. (displayed in the Bibliographic Record workform)	
Bibliographic record general filters	
Bib record set	Bibs belong to the selected record set
Owner	Bibs owned by a selected owner
Creator	Bibs created by a selected user
Modifier	Bibs modified by a selected user
Descriptive cataloging form	Bibs with selected descriptive cataloging form
Encoding level	Bib with selected encoding level
MARC language	Bibs with selected language
Bibliographic level	Bibs with selected level
MARC literary form	Bibs with selected literary form
MARC target audience	Bibs with selected target audience
Record status	Bibs with selected status
Primary type of material	Bibs with selected primary type of material (TOM)
Tag range (bibliographic heading) **Note**: This filter is available for authority reports only, not bibliographic reports.	Bibs with heading within the specified tag range
Bib date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" ***on page 18****.*	
MARC publication year	Bibs with publication years within the specified year range
Creation date	*Date filter:* • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date
First available date	*Date filter:* • First available date between two dates *Relative date filters*: • First available date between a specified number of days, months, or years ago and the report run date • First available date more than a specified number of days, months, or years before the report run date
Imported date	*Date filter:* • Imported date between two dates *Relative date filters*: • Imported date between a specified number of days, months, or years ago and the report run date • Imported date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Modification date	*Date filter:* • Modification date between two dates *Relative date filters*: • Modification date between a specified number of days, months, or years ago and the report run date • Modification date more than a specified number of days, months, or years before the report run date
Record status date	*Date filter:* • Bibs with a record status date between two dates *Relative date filters*: • Record status date between a specified number of days, months, or years ago and the report run date • Record status date more than a specified number of days, months, or years before the report run date
Bib miscellaneous filters	
ILL checked	Bibs with interlibrary loan flag checked
ILL unchecked	Bibs with interlibrary loan flag unchecked
Display in PAC unchecked	Bibs do not display in PAC
Display in PAC checked	Bibs display in PAC
Record has at least one 856$u subfield	Bibs with at least one URLs
Record has no 856$u subfields	Bibs without URLs
Bib aggregate filters	
Active holds count	Bibs with active holds greater than or equal to, less than or equal to, or equal to the number entered
Lifetime circ count	Bibs with lifetime circulation counts greater than or equal to, less than or equal to, or equal to the number entered
Lifetime in house use count	Bibs with lifetime in-house circulation counts greater than or equal to, less than or equal to, or equal to the number entered
Number of items	Bibs with a number of linked items greater than or equal to, less than or equal to, or equal to the number entered
Number of serial holdings records (SHR copies)	Bibs with a number of linked serial holdings records greater than or equal to, less than or equal to, or equal to the number entered
Number of received serial issues	Bibs with a number of received serial issues greater than or equal to, less than or equal to, or equal to the number entered
YTD circ count	Bibs with a year-to-date circulation count greater than or equal to, less than or equal to, or equal to the number entered
YTD in house use count	Bibs with a year-to-date in-house use count greater than or equal to, less than or equal to, or equal to the number entered
Bib ID filters	
Bibliographic record ID	Bibs with record IDs between the range entered

Filter Name	*Criteria Limiting Report Output*
Authority Record Filters	
Authority record general filters	
Authority record set	Limits report output to authority records in the selected record set
Authority record ID range	Authority records with IDs within specified range
MARC record status	Authority records with a selected status
Cataloging source	Authority records from a selected cataloging source
Character coding scheme	Authority records with a selected character coding scheme
Encoding level	Authority records with a selected encoding level
Descriptive cataloging rules	Authority records with a selected cataloging rule
Direct or indirect geographic subdivision	Authority records with a selected geographic subdivision
Kind of record	Authority records of a selected kind
Level of establishment	Authority records with a selected level of establishment
Numbered or unnumbered series	Authority records with a selected type of numbering
Reference evaluation	Authority records with a selected reference evaluation
Romanization scheme	Authority records with a selected Romanization scheme
Subject heading system/thesaurus	Authority records with a selected subject heading/thesaurus
Tag range (authority heading)	Authority records with headings in the specified tag range
Type of government agency	Authority records with a selected government agency type
Type of subject subdivision	Authority record with a selected subject subdivision
Type of series	Authority records with a selected type of series
Undifferentiated personal name	Authority records with a selected personal name type
Heading use -- main or added entry	Authority records with a selected main or added entry heading use
Heading use -- subject or subject added entry	Authority records with a selected subject or subject added entry heading use
Heading use -- series or series added entry	Authority records with a selected series or series added entry heading use
Record status	Authority records with a selected status
Authority record date filters	
Date filters limit the report output by a specified from and to date range. *Relative date filters limit the report output by a time period relative to the report run date.* *For more information, see "Filter by Dates Relative to a Report Run Date"* ***on page 18***.	
Creation date	*Date filter:* • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
First use date	*Date filter:* • First use date between two dates *Relative date filters*: • First use date between a specified number of days, months, or years ago and the report run date • First use date more than a specified number of days, months, or years before the report run date
Imported date	*Date filter:* • Imported date between two dates *Relative date filters*: • Imported date between a specified number of days, months, or years ago and the report run date • Imported date more than a specified number of days, months, or years before the report run date
Modification date	*Date filter:* • Modification date between two dates *Relative date filters*: • Modification date between a specified number of days, months, or years ago and the report run date • Modification date more than a specified number of days, months, or years before the report run date
Record status date	*Date filter:* • Record status date between two dates *Relative date filters*: • Record status date between a specified number of days, months, or years ago and the report run date • Record status date more than a specified number of days, months, or years before the report run date
Authority record aggregate filters	
Number of linked authority records - Less than or equal to, Greater than or equal to, or equal to	Select an option from the drop-down list and type a number to limit the report output to authority records with a number of linked authority records less than or equal to, greater than or equal to, or equal to the number entered.
Number of linked bib records - Less than or equal to, Greater than or equal to, or equal to	Select an option from the drop-down list and type a number to limit the report output to authority records with a number of linked authority records less than or equal to, greater than or equal to, or equal to the number entered.

Filter Name	*Criteria Limiting Report Output*
	Purchase Order Filters
	These filters limit the report output by data in the purchase order header, purchase order line items, and purchase order line item segments. (displayed in the Purchase Order and Purchase Order Line Item workforms)
	Purchase order header filters
Fiscal year	Fund reports are for a single fiscal year. First select the Fiscal year status, then select a fiscal year from the list box.
Ordered at Library quick pick	Selects all branches associated with the library
Ordered at branch	Purchase orders sent by the selected branch or branches
Creator	Purchase orders created by the selected user or users
Modifier	Purchase orders modified by the selected user or users
Status	Purchase orders with the selected status or statuses
Type	Purchase orders with the selected type or types
Shipping method	Purchase orders with the selected shipping method
Supplier	Purchase orders with the selected supplier
Plan name	Purchase orders with the specified plan name
Number	Purchase orders with the specified number
Suffix	Purchase orders with the specified suffix
Note	Purchase orders with the specified notes
Prepaid	Include only pre-paid purchase orders in report output
Not prepaid	Exclude pre-paid purchase orders in the report output
	Purchase order date filters & relative date filters
	Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" on page 18.
Creation date	*Date filter:* • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date
Confirmation date	*Date filter:* • Confirmation date between two dates *Relative date filters*: • Confirmation date between a specified number of days, months, or years ago and the report run date • Confirmation date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to purchase orders without a confirmation date.

Filter Name	*Criteria Limiting Report Output*
Release date	*Date filter:* • Release date between two dates *Relative date filters*: • Release date between a specified number of days, months, or years ago and the report run date • Release date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to purchase orders without a release date.
Ship date	*Date filter:* • Ship date between two dates *Relative date filters*: • Ship date between a specified number of days, months, or years ago and the report run date • Ship date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to purchase orders without a ship date.
Status date	*Date filter:* • Status update date between two dates *Relative date filters*: • Status update date between a specified number of days, months, or years ago and the report run date • Status update date more than a specified number of days, months, or years before the report run date
Purchase order aggregate filters	
Purchase order total - Less than or equal to, Greater than or equal to, or Equal to ____	Select an option from the drop-down list and type a number. Purchase orders with totals less than or equal to, greater than or equal to, or equal to the specified dollar amount
Number of purchase order lines - Less than or equal to, Greater than or equal to, or Equal to ____	Select an option from the drop-down list and type a number. Purchase orders with a number of purchase order line items less than or equal to, greater than or equal to, or equal to the specified number
Quantity claimed - Less than or equal to, Greater than or equal to, or Equal to ____	Select an option from the drop-down list and type a number. Purchase orders with a quantity claimed less than or equal to, greater than or equal to, or equal to the specified number
Quantity cancelled - Less than or equal to, Greater than or equal to, or Equal to ____	Select an option from the drop-down list and type a number. Purchase orders with a quantity cancelled less than or equal to, greater than or equal to, or equal to the specified number
Quantity ordered - Less than, Greater than, or Equal to quantity received	Select an option from the drop-down list. Purchase orders with a quantity ordered less than, greater than or equal to the quantity ordered
Quantity received - Less than, Greater than, or Equal to quantity invoiced	Select an option from the drop-down list. Purchase orders with a quantity received less than, greater than, or equal to the quantity invoiced

Filter Name	*Criteria Limiting Report Output*
Purchase order line item filters	
Segment collection	Purchase order line item segments with the selected collection
Segment organization	Purchase order line item segments with the selected destination branch
Segment fund	Purchase order line item segments with the selected fund
Material type	Purchase order line items with the selected material type
Segment payment status	Purchase orders line item segments with the selected payment status
Segment status	Purchase order line item segments with the selected status
Line item status	Purchase order line items with the selected status
Note	Purchase order line item notes matching the entered text
Public note	Purchase order line items with public notes matching the entered text
Non-public note	Purchase order line items with non-public notes matching the entered text
Purchase order line item date filters and relative date filters	
Payment status date	*Date filter:* • Payment status date between two dates *Relative date filters*: • Payment status date between a specified number of days, months, or years ago and the report run date • Payment status date more than a specified number of days, months, or years before the report run date
Rental return date	*Date filter:* • Rental return date between two dates *Relative date filters*: • Rental return date between a specified number of days, months, or years ago and the report run date • Rental return date more than a specified number of days, months, or years before the report run date
Status date	*Date filter:* • Status date between two dates *Relative date filters*: • Status date between a specified number of days, months, or years ago and the report run date • Status date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Invoice Filters	
These filters limit the report output by data in the invoice header, invoice line items, and invoice line item segments. (displayed in the Invoice and Invoice Line Item workforms)	
Fiscal year	Invoice reports are for a single fiscal year. First select the Fiscal year status, then select a fiscal year from the list box.
Library quick pick	Selecting a library automatically selects its associated branches
Branch	Invoice records paid by the selected branch
Creator	Invoice records created by the selected user
Modifier	Invoice records modified by the selected user
Type	Invoice records of the selected type
Status	Invoice records with the selected status
Payment method	Invoice records with the selected payment method
Supplier	Invoice records linked to the selected supplier If Not present is selected, the report output is limited to invoices without a linked supplier.
Number	Invoice records with the specified invoice number
Suffix	Invoice records with the specified invoice number suffix
Note	Invoice records with notes matching the entered text
Invoice date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" on page 18.	
Creation date	*Date filter:* • Creation between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date
Invoice date	*Date filter:* • Invoice date between two dates *Relative date filters*: • Invoice date between a specified number of days, months, or years ago and the report run date • Invoice date more than a specified number of days, months, or years before the report run date
Payment status date	*Date filter:* • Payment status date between two dates *Relative date filters*: • Payment status date between a specified number of days, months, or years ago and the report run date • Payment status date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to invoices without a payment status date

Filter Name	*Criteria Limiting Report Output*
Receipt date	*Date filter:* • Receipt date between two dates *Relative date filters*: • Receipt date between a specified number of days, months, or years ago and the report run date • Receipt date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to invoices without a receipt date.
Ship date	*Date filter:* • Shipped date between two dates *Relative date filters*: • Shipped date between a specified number of days, months, or years ago and the report run date • Shipped date more than a specified number of days, months, or years before the report run date
Status date	*Date filter:* • Status update date between two dates *Relative date filters*: • Status update date between a specified number of days, months, or years ago and the report run date • Status update date more than a specified number of days, months, or years before the report run date
Voucher check date	*Date filter:* • Voucher check date between two dates *Relative date filters*: • Voucher check date between a specified number of days, months, or years ago and the report run date • Voucher check date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to invoices without a voucher check date
Voucher date	*Date filter:* • Voucher date between two dates *Relative date filters*: • Voucher date between a specified number of days, months, or years ago and the report run date • Voucher date more than a specified number of days, months, or years before the report run date **Not present** - limits the report output to invoices without a voucher date

Filter Name	*Criteria Limiting Report Output*
	Invoice Aggregate Filters
Cataloging services charge - Less than or equal to, Greater than or equal to, or Equal to ______	Select an option from the drop-down list and type a number. Invoices with total charges for cataloging services less than or equal to, greater than or equal to, or equal to the specified dollar amount
Invoice total - Less than or equal to, Greater than or equal to, or Equal to ______	Select an option from the drop-down list and type a number. Invoices with totals less than or equal to, greater than or equal to, or equal to the specified dollar amount
Number of invoice lines - Less than or equal to, Greater than or equal to, or Equal to ______	Select an option from the drop-down list and type a number. Invoices with a number of invoice lines less than or equal to, greater than or equal to, or equal to the specified number
Other charges - Less than or equal to, Greater than or equal to, or Equal to ______	Select an option from the drop-down list and type a number. Invoices with total charges for other services less than or equal to, greater than or equal to, or equal to the specified dollar amount
Shipping charges - Less than or equal to, Greater than or equal to, or Equal to ______	Select an option from the drop-down list and type a number. Invoices with total charges for shipping less than or equal to, greater than or equal to, or equal to the specified dollar amount
Special handling charges -Less than or equal to, Greater than or equal to, or Equal to ______	Select an option from the drop-down list and type a number. Invoices with total charges for special handling less than or equal to, greater than or equal to, or equal to the specified dollar amount
Quantity received - Less than, Greater than, or Equal to - the quantity paid	Select an option from the drop-down list. Invoices with a quantity received that is less than, greater than or equal to the quantity paid
	Invoice Line Item Filters
Segment collection	Invoices with line items for the selected collection(s)
Segment destination	Invoices with line items for the selected destination branch(es)
Segment fund	Invoices with line items with the selected fund(s)
Line item payment status	Invoices with line items with the selected payment status(es)
Segment payment status	Invoices with line item segments with the selected payment status(es)
Material type	Invoices with line items for the selected material type(s)

Filter Name	*Criteria Limiting Report Output*
Serials Filters	
Serial Holdings Record Filters	
These filters limit the report output by data in the serial holdings record. (displayed in the Serial Holdings Record workform)	
Completeness code	Serial holdings records with the selected completeness code(s)
Creator	Serial holdings records with the selected creator(s).
Collection	Serial holdings records with the selected collection(s)
Library quick pick	Selecting the library automatically selects its associated branches.
Branch (destination)	Serial holdings records with the selected branch(es) destination(s)
Material type	Serial holdings records with the selected material type(s)
Modifier	Serial holdings records with the selected modifier(s)
Order type	Serial holdings records with the selected order type(s)
Shelving scheme	Serial holdings records with the selected shelving scheme(s)
Status	Serial holdings records with the selected status(es)
Holdings record note filters	
Non-public note	Type the note text to limit the report output to serial holdings records with this text in the Non-public note field.
Shared public note	Type the note text to limit the report output to serial holdings records with this text in the Shared public note field.
Non-public/warning note	Type the note text to limit the report output to serial holdings records with this text in the Non-public warning note.
Holdings record date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see “Filter by Dates Relative to a Report Run Date” on page 18.	
Creation date	*Date filter:* • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date between a specified number of days, months, or years before the report run date
Intent to cancel date	*Date filter:* • Intent to cancel date between two dates *Relative date filters*: • Intent to cancel date between a specified number of days, months, or years ago and the report run date • Intent to cancel date more than a specified number of days, months, or years before the report run date
Modification date	*Date filter:* • Modification date between two dates *Relative date filters*: • Modification date between a specified number of days, months, or years ago and the report run date • Modification date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Start date	*Date filter:* • Start date between two dates *Relative date filters*: • Start date between a specified number of days, months, or years ago and the report run date • Start date more than a specified number of days, months, or years before the report run date
Issue/part general filters	
These filters limit the report output by data in the issue or part record, displayed in the Issue or Part workform)	
Status	Issues or parts with an issue status equal to the selected status
Claim reason	Issues or parts with a claim reason equal to the selected status
Issue/part note filters	
Non-public note	Type a note to limit the report output to issues or parts with this note text in the non-public note field.
Public note	Type a note to limit the report output to issues or parts with this note text in the public note box.
Non-public/warning note	Type a note to limit the report output to issues or part with this note text in the non-public warning note field.
Issue/part date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. *Relative date filters limit the report output by a time period relative to the report run date* *For more information, see "Filter by Dates Relative to a Report Run Date" on page 18*	
Chronology date	*Date filter*: • Chronology date between two dates *Relative date filters*: • Chronology date between a specified number of days, months, or years ago and the report run date • Chronology date more than a specified number of days, months, or years before the report run date
Expected arrival date	*Date filter*: • Expected arrival date between two dates *Relative date filters*: • Expected arrival date between a specified number of days, months, or years ago and the report run date • Expected arrival date more than a specified number of days, months, or years before the report run date
Status date	*Date filter*: • Status update date between two dates *Relative date filters*: • Status update date between a specified number of days, months, or years ago and the report run date • Status update date more than a specified number of days, months, or years before the report run date
Publication pattern filters	
Category	Serial holdings records by the selected publication pattern category

Filter Name	*Criteria Limiting Report Output*
Subscription/supplier General Filters	
These filters limit the report output by data in the subscription or supplier record. (displayed in the Subscription workform or the Supplier workform)	
Fund	Serial holdings records linked to subscription records paid for with the selected fund(s)
Method	Serial holdings records linked to subscription records with the selected method
Supplier	Serial holdings records linked to subscription records with the selected supplier(s)
Status	Serial holdings record with the selected status
Term	Serial holdings records with the selected term
Subscription/supplier note filters	
Subscription note	Serial holdings records linked to subscriptions containing a note matching the text entered
Supplier note	Serial holdings records linked to supplier records containing a note matching the text entered
Subscription date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" on page 18.	
Subscription creation date	*Date filter*: • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date
Expiration date	*Date filter*: • Expiration date between two dates *Relative date filters*: • Expiration date between a specified number of days, months, or years ago and the report run date • Expiration date more than a specified number of days, months, or years before the report run date
Last transaction date	*Date filter*: • Last transaction date between two dates *Relative date filters*: • Last transaction date between a specified number of days, months, or years ago and the report run date • Last transaction date more than a specified number of days, months, or years before the report run date
Original date	*Date filter*: • Original subscription date between two dates *Relative date filters*: • Original subscription date between a specified number of days, months, or years ago and the report run date • Original subscription date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Start date	*Date filter*: • Start date between two dates *Relative date filters*: • Start date between a specified number of days, months, or years ago and the report run date • Start date more than a specified number of days, months, or years before the report run date
Status date	*Date filter*: • Status update date between two dates *Relative date filters*: • Status update date between a specified number of days, months, or years ago and the report run date • Status update date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Fund Filters	
These filters limit the report output by data in the fund record. (displayed in the Fund workform)	
Fiscal year	Fund reports are for a single fiscal year. First select the Fiscal year status, then select a fiscal year from the list box.
Name	Funds with the specified name
Owner	Funds with the selected owner
Type	Funds of the selected fund type
Donation category	Donation funds in the selected category
Donor	Donation funds with the selected donor
Modifier	Fund records modified by the selected user
Transfers allowed	Fund records that allow transfers
Fund date filters & relative date filters	
Date filters limit the report output by a specified from and to date range. Relative date filters limit the report output by a time period relative to the report run date. For more information, see "Filter by Dates Relative to a Report Run Date" on page 18.	
Creation date	*Date filter*: • Creation date between two dates *Relative date filters*: • Creation date between a specified number of days, months, or years ago and the report run date • Creation date more than a specified number of days, months, or years before the report run date
Modification date	*Date filter*: • Modification date between two dates *Relative date filters*: • Modification date between a specified number of days, months, or years ago and the report run date • Modification date more than a specified number of days, months, or years before the report run date
Status date	*Date filter*: • Status update date between two dates *Relative date filters*: • Status update date between a specified number of days, months, or years ago and the report run date • Status update date more than a specified number of days, months, or years before the report run date

Filter Name	*Criteria Limiting Report Output*
Fund balance filters	
Allocated amount	Funds with an amount allocated greater than or equal to, less than or equal to, or equal to the amount entered
Expended amount	Funds with an amount expended greater than or equal to, less than or equal to, or equal to the amount entered
Encumbered amount	Funds with an amount encumbered greater than or equal to, less than or equal to, or equal to the amount entered
Free balance amount	Funds with a free balance amount greater than or equal to, less than or equal to, or equal to the amount entered
Carry over allocation	Funds with a carry over allocation amount greater than or equal to, less than or equal to, or equal to the amount entered
Fund transaction history filters	
Type	Funds with a fund history that includes the selected transaction type
Creator	Funds created by the selected creator
Amount	Funds with a transaction amount Equal to, Less than or equal to, or Greater than or equal to
Date	Funds with a transaction date within a specified date range or within a time period relative to the report run date: between a specified number of days, months, or years ago and the report run date; or more than a specified number of days, months, or years before the report run date

Database Columns

The following table lists each column name as it is displayed in the report output columns lists in SimplyReports, the database table that contains the column, and the column name in the database. The SimplyReports administrator can specify different names for these report output columns. See “Edit a report output column” on page 61. Once the names are changed, they do not revert to the original name.

Note:
For information on selecting and sorting columns, see “Creating Reports” on page 8

When a report is generated, the column headings on the report usually match the database column name. You can change the column headings on the report in an Excel or a text file after a report is generated.

Tip:
For more information on database tables and columns, see the Polaris database Help on the Polaris customer extranet.

The following types of database columns are available to create the report columns:

- “Patron Columns” on page 101
- “Patron Account Columns” on page 104
- “Holds Columns” on page 105
- “Item Columns” on page 106
- “Bibliographic Columns” on page 110
- “Authority Columns” on page 113
- “Serials Columns” on page 114
- “Supplier Columns” on page 116
- “Fund Columns” on page 117
- “Invoice Columns” on page 120
- “Purchase Order Columns” on page 123

List Box Text	*Database Table*	*Database Column*
Patron Columns		
Patron Output Columns for Patron, Patron Account, Item, and Holds Reports		
The available patron columns depend on the type of report		
Patron acct charges	PolarisPatrons	ChargesAmount
Patron account credit	Polaris.Patrons	CreditsAmount
Patron addr check date	Polaris.PatronRegistration	AddrCheckDate
Patron address ID	Polaris.PatronAdresses	AddressID
Patron alt email address	Polaris.PatronRegistration	AltEmailAdress
Patron barcode	Polaris.Patrons	Barcode
Patron birth date	Polaris.PatronRegistration	Birthdate
Patron block	Polaris.PatronStopDescriptions	Description
Patron block creation date	Polaris.PatronStops	CreationDate
Patron blocking note	Polaris.PatronNotes	BlockingStatusNotes
Patron blocking note date	Polaris.PatronNotes	BlockingStatusNoteDate
Patron branch abbreviation	Polaris.Organizations	Abbreviation
Patron branch name	Polaris.Organizations	Name
Patron city	Polaris.PostalCodes	City
Patron claim count	Polaris.Patrons	ClaimCount
Patron code	Polaris.PatronCodes	Description
Patron code ID	Polaris.Patrons	PatronCodeID
Patron collection exempt	Polaris.PatronRegistration	CollectionExempt
Patron county	Polaris.PostalCodes	County
Patron deletion exempt	Polaris.PatronRegistration	DeletionExempt
Patron delivery option ID	Polaris.PatronRegistration	DeliveryOptionID
Patron e-mail address	Polaris.PatronRegistration	EmailAddress
Patron entry date	Polaris.PatronRegistration	EntryDate
Patron exclude from bills	Polaris.PatronRegistration	ExcludeFromBills
Patron exclude from holds	Polaris.PatronRegistration	ExcludeFromHolds
Patron exclude from overdues	Polaris.PatronRegistration	ExcludeFromOverdues
Patron expiration date	Polaris.PatronRegistration	ExpirationDate
Patron fax	Polaris.PatronRegistration	PhoneFAX
Patron first name	Polaris.PatronRegistration	NameFirst

List Box Text	Database Table	Database Column
Patron former barcode	Polaris.PatronRegistration	FormerID
Patron free text block	Polaris.PatronFreeTextBlocks	FreeTextBlocks
Patron free text block date	Polaris.PatronFreeTextBlocks	FreeTextBlockDate
Patron free text message	Polaris.PAC_PatronFreeTextMessages	FreeTextMessage
Patron free text message date	Polaris.PAC_PatronFreeTextMessages	CreationDate
Patron full name	Polaris.PatronRegistration	PatronFullName
Patron gender	Polaris.PatronRegistration	Gender
Patron language	Polaris.Languages	LanguageDesc
Patron language ID	Polaris.PatronRegistration	LanguageID
Patron last activity date	Polaris.Patrons	LastActivityDate
Patron last name	Polaris.PatronRegistration	NameLast
Patron lifetime circ count	Polaris.Patrons	LifetimeCircCount
Patron lost item count	Polaris.Patrons	LostItemCount
Patron maintain permanent reading list	Polaris.PatronRegistration	ReadingList
Patron message	Polaris.SA_PatronMessageLanguageStrin gs	MessageValue
Patron message date	Polaris.PAC_PatronMessages	CreationDate
Patron middle name	Polaris.PatronRegistration	NameMiddle
Patron name suffix	Polaris.PatronRegistration	NameSuffix
Patron non-blocking note	Polaris.PatronNotes	NonBlockingStatusNotes
Patron postal code	Polaris.PostalCodes	PostalCode
Patron password	Polaris.PatronRegistration	Password
Patron postal code	Polaris.PostalCodes	PostalCode
Patron previous year circ count	Polaris.PrevYearPatronsCirc	YTDCircCount
Patron reading list allowed	Polaris.PatronRegistration	ReadingList
Patron registration date	Polaris.PatronRegistration	RegistrationDate
Patron state	Polaris.PostalCodes	State
Patron statistical class	Polaris.PatronRegistration	StatisticalClassID
Patron statistical class description	Polaris.PatronStatClassCodes	Description
Patron street one	Polaris.Addresses	StreetOne
Patron street two	Polaris.Addresses	StreetTwo
Patron telephone 1	Polaris.PatronRegistration	PhoneVoice1
Patron telephone 2	Polaris.PatronRegistration	PhoneVoice2

List Box Text	*Database Table*	*Database Column*
Patron telephone 3	Polaris.PatronRegistration	PhoneVoice3
Patron user 1	Polaris.PatronRegistration	User1
Patron user 2	Polaris.PatronRegistration	User2
Patron user 3	Polaris.PatronRegistration	User3
Patron user 4	Polaris.PatronRegistration	User4
Patron user 5	Polaris.PatronRegistration	User5
Patron update date	Polaris.PatronRegistration	UpdateDate
Patron YTD circ count	Polaris.Patrons	YTDCircCount
Patron zip + 4	Polaris.Addresses	ZipPlusFour
Patron Output Columns for Patron Count Reports Only		
Sum patron charges amount	Polaris.Patrons	ChargesAmount
Sum patron claim count	Polaris.Patrons	ClaimCount
Sum patron credits amount	Polaris.Patrons	CreditsAmount
Sum patron lifetime circ count	Polaris.Patrons	LifetimeCircCount
Sum patron lost item Count	Polaris.Patrons	LostItemCount
Sum patron YTD circ count	Polaris.Patrons	YTDCircCount
Sum prev year patron circ count	Polaris.PrevYearPatronsCirc	YTDCircCount

List Box Text	*Database Table*	*Database Column*
Patron Account Columns		
Patron Account Output Columns for Patron Account List and Count Reports		
Acct fee reason code description	Polaris.FeeReasonCodes	FeeDescription
Acct fee reason code ID	Polaris.PatronAccount	FeeReasonCodeID
Acct payment method description	Polaris.PatronPaymentMethods	Description
Acct payment method ID	Polaris.PatronAccount	PaymentMethodID
Acct transaction branch abbreviation	Polaris.Organizations	Abbreviation
Acct transaction branch ID	Polaris.PatronAccount	OrganizationID
Acct transaction branch name	Polaris.Organizations	Name
Acct transaction creator ID	Polaris.PatronAccount	CreatorID
Acct transaction creator name	Polaris.PolarisUsers	Name
Acct transaction type	Polaris.PatronAccTxnCodes	AlternateName
Acct transaction type ID	Polaris.PatronAccount	TxnCodeID
Acct transaction workstation	Polaris.PatronAccount	WorkStationID
Acct transaction workstation computer name	Polaris.Workstations	ComputerName
Acct transaction workstation display name	Polaris.Workstations	DisplayName
Patron Account Output Columns for Patron Account List Reports Only		
Acct trans. balance - outstanding charges only	Polaris.PatronAccount	OutstandingAmount
Acct transaction amount - history items only	Polaris.PatronAccount	TxnAmount
Patron Account Output Columns for Patron Account Count Reports Only		
Sum - balance (outstanding balance only)	Polaris.PatronAccount	OutstandingAmount
Sum - item price	Polaris.ItemRecordDetails	Price
Sum - patron charges amount	Polaris.Patrons	ChargesAmount
Sum - patron credits amount	Polaris.Patrons	CreditsAmount
Sum - transaction amount (history only)	Polaris.PatronAccount	TxnAmount

List Box Text	*Database Table*	*Database Column*
Holds Columns		
Holds Columns for Holds List and Count Reports		
Hold activation date	Polaris.SysHoldRequests	ActivationDate
Hold borrow by mail request	Polaris.RWRITERCodeTranslations	BorrowByMailRequest
Hold creation date	Polaris.SysHoldRequests	CreationDate
Hold creator ID (if staff)	Polaris.SysHoldRequests	CreatorID
Hold creator name (if staff)	Polaris.PolarisUsers	Name
Hold expiration date	Polaris.SysHoldRequests	ExpirationDate
Hold last status transition date	Polaris.SysHoldRequests	LastStatusTransitionDate
Hold modification date	Polaris.SysHoldRequests	ModificationDate
Hold modifier ID (if staff)	Polaris.SysHoldRequests	ModifierID
Hold modifier name (if staff)	Polaris.PolarisUsers	Name
Hold non-public note	Polaris.SysHoldRequests	NonPublicNotes
Hold notification date	Polaris.SysHoldRequests	HoldNotificationDate
Hold notification option	Polaris.DeliveryOptions	DeliveryOption
Hold notification option ID	Polaris.SysHoldRequests	DeliveryOptionID
Hold origin of request ID	Polaris.SysHoldRequests	Origin
Hold origin of request	Polaris.RWRITERCodeTranslations	Description
Hold PAC display note	Polaris.SysHoldRequests	PACDisplayNotes
Hold patron note	Polaris.SysHoldRequests	PatronNotes
Hold pickup branch abbreviation	Polaris.Organizations	Abbreviation
Hold pickup branch ID	Polaris.SysHoldRequests	PickupBranchID
Hold pickup branch name	Polaris.Organizations	Name
Hold request ID	Polaris.SysHoldRequests	SysHoldRequestID
Hold staff display note	Polaris.SysHoldRequests	StaffNotes2
Hold status	Polaris.SysHoldStatuses	Description
Hold status ID	Polaris.SysHoldRequests	SysHoldStatusID
Hold till date	Polaris.SysHoldRequests	HoldTillDate
Hold tracking info	Polaris.SysHoldRequests	TrackingInfo

List Box Text	Database Table	Database Column
Item Columns		
Item Columns for Item, Patron Account, Authority, Serials, Fund, Order and Invoice Reports		
The available item columns depend on the report type. The item columns in Order and Invoice reports are derived from the PolarisRwriterLineItemtoItemsView table.		
Item acquisitions date	Polaris.ItemRecordDetails	AcquisitionDate
Item assigned branch abbreviation	Polaris.Organizations	Abbreviation
Item assigned branch ID	Polaris.CircItemRecords	AssignedBranchID
Item assigned branch name	Polaris.Organizations	Name
Item assigned collection abbreviation	Polaris.Collections	Abbreviation
Item assigned collection ID	Polaris.CircItemRecords	AssignedCollectionID
Item assigned collection name	Polaris.Collections	Name
Item barcode	Polaris.CircItemRecords	Barcode
Item call number	Polaris.ItemRecordDetails	CallNumber
Item call number prefix	Polaris.ItemRecordDetails	CallNumberPrefix
Item call number suffix	Polaris.ItemRecordDetails	CallNumberSuffix
Item check in branch abbreviation	Polaris.Organizations	CheckInBranchAbbr
Item check in branch name	Polaris.Organizations	CheckInBranchName
Item check in user	Polaris.PolarisUsers	CKIUser
Item check in workstation	Polaris.Workstations	CKIWorkstation
Item check out branch abbreviation	Polaris.Organizations	CheckOutBranchAbbr
Item check out branch name	Polaris.Organizations	CheckOutBranchName
Item checkout date	Polaris.ItemCheckouts	CheckOutDate
Item circ status description	Polaris.ItemStatuses	Description
Item circ status ID	Polaris.CircItemRecords	ItemStatusID
Item claimed date	Polaris.PatronClaims	ClaimDate
Item classification number	Polaris.ItemRecordDetails	ClassificationNumber
Item creation date	Polaris.ItemRecordDetails	ItemCreationDate
Item creator ID	Polaris.ItemRecordDetails	ItemCreatorID
Item creator name	Polaris.ItemRecordDetails	ItemCreatorName
Item copy number	Polaris.ItemRecordDetails	CopyNumber
Item cutter number	Polaris.ItemRecordDetails	CutterNumber
Item designation	Polaris.SysHoldRequests	Designation
Item donor corporate name	Polaris.Donors	CorporateName

List Box Text	Database Table	Database Column
Item donor email	Polaris.Donors	Email
Item donor first name	Polaris.Donors	FirstName
Item donor ID	Polaris.ItemRecordDetails	DonorID
Item donor last name	Polaris.Donors	LastName
Item donor middle name	Polaris.Donors	MiddleName
Item donor renewal date	Polaris.Donors	RenewalDate
Item due date	Polaris.ItemCheckouts	DueDate
Item fine code	Polaris.FineCodes	Description
Item fine code ID	Polaris.CircItemRecords	FineCodeID
Item fine code description	Polaris.FineCodes	Description
Item first available date	Polaris.CircItemRecords	FirstAvailableDate
Item free text block	PolarisCircItemRecords	FreeTextBlock
Item funding source	Polaris.ItemRecordDetails	FundingSource
Item home branch abbr	Polaris.Organizations	Abbreviation
Item home branch ID	Polaris.CircItemRecords	HomeBranchID
Item home branch name	Polaris.Organizations	Name
Item Imported date	Polaris.ItemRecordDetails	ImportedDate
Item last check in date	Polaris.CircItemRecords	CheckInDate
Item last circ activity date	Polaris.CircItemRecords	LastCircTransactionDate
Item last circ status change date	Polaris.CircItemRecords	ItemStatusDate
Item last checkout/renewal date	Polaris.CircItemRecords	LastCheckOutRenewDate
Item last in transit date	Polaris.CircItemRecords	InTransitSentDate
Item last inventory date	Polaris.ItemRecordDetails	LastInventoryDate
Item lifetime circ count	Polaris.CircItemRecords	LifetimeCircCount
Item lifetime in house use count	Polaris.CircItemRecords	LifeTimeInHouseUsecount
Item loan period code description	Polaris.LoanPeriodCodes	Description
Item loan period code ID	Polaris.CircItemRecords	LoanPeriodCodeID
Item lost date	Polaris.PatronLostItems	LostDate
Item material type description	Polaris.MaterialTypes	Description
Item material type ID	Polaris.CircItemRecords	MaterialTypeID
Item modification date	Polaris.ItemRecordDetails	ModificationDate
Item modifier ID	Polaris.ItemRecordDetails	ModifierID
Item modifier name	Polaris.PolarisUsers	Name

List Box Text	*Database Table*	*Database Column*
Item nonpublic note	Polaris.ItemRecordDetails	NonPublicNote
Item original check out date	Polaris.CircItemRecords	OriginalCheckOutDate
Item original due date	Polaris.CircItemRecords	OriginalDueDate
Item overdue notice date	Polaris.ItemCheckouts	OVDNoticeDate
Item owning organization abbreviation	Polaris.Organizations	Abbreviation
Item owning organization ID	Polaris.ItemRecordDetails	OwningBranchID
Item owning organization name	Polaris.Organizations	Name
Item physical condition	Polaris.ItemRecordDetails	PhysicalCondition
Item prev year circ count	Polaris.PrevYearItemsCirc	YTDCircCount
Item prev year inhouse use count	Polaris.PrevYearItemsCirc	YTDInHouseUseCount
Item price	Polaris.ItemRecordDetails	Price
Item public note	Polaris.ItemRecordDetails	PublicNote
Item received from in transit date	Polaris.CircItemRecords	InTransitRecvdDate
Item receiving branch abbreviation	Polaris.Organizations	Abbreviation
Item receiving branch name	Polaris.Organizations	Name
Item record history action	Polaris.ItemRecordHistoryActions	ActionTakenDesc
Item record history transaction date	Polaris.ItemRecordHistory	TransactionDate
Item record ID	Polaris.CircItemRecords	ItemRecordID
Item record status date	Polaris.CircItemRecords	RecordStatusDate
Item record status ID	Polaris.CircItemRecords	RecordStatusID
Item record status name	Polaris.RecordStatuses	RecordStatusName
Item renewal limit	Polaris.CircItemRecords	RenewalLimit
Item shelf location description	Polaris.ShelfLocations	Description
Item shelf location ID	Polaris.CircItemRecords	ShelfLocationID
Item shelving scheme description	Polaris.ShelvingSchemes	Description
Item shelving scheme ID	Polaris.ItemRecordDetails	ShelvingSchemeID
Item statistical code description	Polaris.StatisticalCodes	Description
Item statistical code ID	Polaris.CircItemRecords	StatisticalCodeID
Item volume number	Polaris.ItemRecordDetails	VolumeNumber
Item YTD circ count	Polaris.CircItemRecords	YTDCircCount
Item YTD inhouse use count	Polaris.CircItemRecords	YTDInHouseUseCount

List Box Text	*Database Table*	*Database Column*
Item Columns for Item Count Reports Only		
Sum item lifetime circ count	Polaris.CircItemRecords	LifetimeCircCount
Sum item lifetime in house use count	Polaris.CircItemRecords	LifetimeInHouseUseCount
Sum item price	Polaris.ItemRecordDetails	Price
Sum item YTD circ count	Polaris.CircItemRecords	YTDCircCount
Sum item YTD inhouse use count	Polaris.CircItemRecords	YTDInHouseUseCount
Sum prev year circ count	Polaris.PrevYearItemsCirc	YTDCircCount
Sum prev year inhouse use count	Polaris.PrevYearItemsCirc	YTDInHouseUseCount

List Box Text	Database Table	Database Column
Bibliographic Columns		
Bibliographic Columns for Bibliographic, Patron Account, Holds, Item, Authority, Fund, Purchase Order and Invoice Reports		
The available bibliographic columns depend on the report type. The bibliographic columns in Order reports are derived from the PolarisRwriterPOlineView table. The bibliographic columns in Invoice reports are derivedfrom the PolarisRwriterInvlineView table.		
Bib creation date	Polaris.BibliographicRecords	CreationDate
Bib creator ID	Polaris.BibliographicRecords	CreatorID
Bib creator name	Polaris.PolarisUsers	Name
Bib first available date	Polaris.BibliographicRecords	FirstAvailableDate
Bib imported date	Polaris.BibliographicRecords	ImportedDate
Bib lifetime circ count	Polaris.BibliographicRecords	LifetimeCircCount
Bib lifetime in house use	Polaris.BibliographicRecords	LifetimeInHouseUseCount
Bib modification date	Polaris.BibliographicRecords	ModificationDate
Bib modifier ID	Polaris.BibliographicRecords	ModifierID
Bib modifier name	Polaris.PolarisUsers	Name
Bib number of active holds	Polaris.RWRITER_BibDeriveDataView	NumberActiveHolds
Bib number of claim returned items	Polaris.RWRITER_BibDeriveDataView	NumberClaimRetItems
Bib number of items	Polaris.RWRITER_BibDeriveDataView	NumberofItems
Bib number of lost items	Polaris.RWRITER_BibDeriveDataView	NumberLostItems
Bib number of missing items	Polaris.RWRITER_BibDeriveDataView	NumberMissingItems
Bib number of received serial holdings issues	Polaris.RWRITER_BibDeriveDataView	ReceivedIssues
Bib number of serial holdings copies	Polaris.RWRITER_BibDeriveDataView	NumberSHRCopies
Bib number of withdrawn items	Polaris.RWRITER_BibDeriveDataView	NumberWithdrawnItems
Bib owner abbreviation	Polaris.Organizations	Abbreviation
Bib owner ID	Polaris.BibliographicRecords	RecordOwnerID
Bib owner name	Polaris.Organizations	Name
Bib record status date	Polaris.BibliographicRecords	RecordStatusDate
Bib record status ID	Polaris.BibliographicRecords	RecordStatusID
Bib record status name	Polaris.RecordStatuses	RecordStatusName
Bib YTD circ count	Polaris.RWRITER_BibDeriveDataView	BibYTDCircCount
Bib YTD in house use count	Polaris.RWRITER_BibDeriveDataView	BibYTDInHouseUseCount
MARC author	Polaris.BibliographicRecords	BrowseAuthor
MARC bib level	Polaris.BibliographicRecords	MARCBibLevel
MARC bib type	Polaris.BibliographicRecords	MARCBibType

List Box Text	*Database Table*	*Database Column*
MARC bibliographic record ID	Polaris.BibliographicRecords	BibliographicRecordID
MARC call number	Polaris.BibliographicRecords	BrowseCallNo
MARC char coding scheme	Polaris.BibliographicRecords	MARCCharCodingScheme
MARC descriptive cataloging form	Polaris.BibliographicRecords	MARCDescCatalogingForm
MARC encoding level description	Polaris.RWRITERCodeTranslations	Description
MARC encoding level ID	Polaris.BibliographicRecords	MARCBibEncodingLevel
MARC ISBN	Polaris.RWRITERBibCtrlNumView	ISBN
MARC ISSN	Polaris.RWRITERBibCtrlNumView	ISSN
MARC language	Polaris.BibliographicRecords	MARCLanguage
MARC language description	Polaris.MARCLanguageCodes	Language
MARC LCCN	Polaris.BibliographicRecords	MARCLCCN
MARC literary form description	Polaris.RWRITERCodeTranslations	Description
MARC literary form ID	Polaris.BibliographicRecords	LiteraryForm
MARC medium (245 $h)	Polaris.BibliographicRecords	MARCMedium
MARC OCLC number	Polaris.RWRITERBibCtrlNumView	OCLCNumber
MARC publication date one	Polaris.BibliographicRecords	MARCPubDateOne
MARC publication date two	Polaris.BibliographicRecords	MARCPubDateTwo
MARC publication place	Polaris.BibliographicRecords	MARCPubPlace
MARC publication status	Polaris.BibliographicRecords	MARCPublicationStatus
MARC publication year	Polaris.BibliographicRecords	PublicationYear
MARC publisher number	Polaris.RWRITERBibCtrlNumView	PublisherNumber
MARC sort author	Polaris.BibliographicRecords	SortAuthor
MARC sort ISBN	Polaris.RWRITERBibCtrlNumView	SortISBN
MARC sort title	Polaris.BibliographicRecords	SortTitle
MARC target audience description	Polaris.RWRITERCodeTranslations	Description
MARC target audience ID	Polaris.BibliographicRecords	MARCTargetAudience
MARC title	Polaris.BibliographicRecords	BrowseTitle
MARC type of control	Polaris.BibliographicRecords	MARCTypeControl
MARC type of material description	Polaris.MARCTypeOfMaterial	Description
MARC type of material ID	Polaris.BibliographicRecord	PrimaryMARCTOMID
MARC URL	Polaris.RWriter_BibURLView	URL

List Box Text	*Database Table*	*Database Column*
Bib Output Columns for Bib Count Reports Only		
Sum bib lifetime circ count	Polaris.RWRITER_BibDerivedDataView	BibLifetimeCircCount
Sum bib lifetime in house use count	Polaris.RWRITER_BibDerivedDataView	BibLifetimeInHouseUseCount
Sum bib number of active holds	Polaris.RWRITER_BibDerivedDataView	NumberActiveHolds
Sum bib number of claim returned items	Polaris.RWRITER_BibDerivedDataView	NumberClaimRetItems
Sum bib number of items	Polaris.RWRITER_BibDerivedDataView	NumberofItems
Sum bib number of lost items	Polaris.RWRITER_BibDerivedDataView	NumberLostItems
Sum bib number of missing items	Polaris.RWRITER_BibDerivedDataView	NumberMissingItems
Sum bib number of received serials holdings issues	Polaris.RWRITER_BibDerivedDataView	ReceivedIssues
Sum bib number of serial holdings copies	Polaris.RWRITER_BibDerivedDataView	NumberSHRCopies
Sum bib number of withdrawn items	Polaris.RWRITER_BibDerivedDataView	NumberWithdrawnItems
Sum bib YTD circ count	Polaris.RWRITER_BibDerivedDataView	BibYTDCircCount
Sum bib YTD in house use count	Polaris.RWRITER_BibDerivedDataView	BibYTDInHouseUseCount

List Box Text	Database Table	Database Column
Authority Columns		
Authority Output Columns for Authority Reports		
Authority creation date	Polaris.AuthorityRecords	CreationDate
Authority creator ID	Polaris.AuthorityRecords	CreatorID
Authority creator name	Polaris.PolarisUsers	Name
Authority first use date	Polaris.AuthorityRecords	FirstUseDate
Authority heading	Polaris.AuthorityRecords	BrowseHeading
Authority imported date	Polaris.AuthorityRecords	ImportedDate
Authority LCCN	Polaris.AuthorityRecords	MARCLCCN
Authority MARC creation date	Polaris.AuthorityRecords	MARCCreaionDate
Authority MARC modification date	Polaris.AuthorityRecords	MARCModificationDate
Authority modification date	Polaris.AuthorityRecords	ModificationDate
Authority modifier ID	Polaris.AuthorityRecords	ModifierID
Authority modifier name	Polaris.PolarisUsers	Name
Authority record ID	Polaris.AuthorityRecords	AuthorityRecordID
Authority record status date	Polaris.AuthorityRecords	RecordStatusDate
Authority record status ID	Polaris.AuthorityRecords	RecordStatusID
Authority record status name	Polaris.RecordStatuses	RecordStatusName
Authority sort heading	Polaris.AuthorityRecords	Heading
Number of linked authority records	PolarisRWriter_HeadingCountView	AuthorityLinks
Number of linked bibliographic records	PolarisRWriter_HeadingCountView	BibliographicLinks
Subject heading system/thesaurus	PolarisRWriter_CodeTranslations	Description

List Box Text	Database Table	Database Column
Serials Columns		
Serials Columns for Serials Reports		
Compressed holdings statement	Polaris.RWRITERReportTables	SHRHoldings
Holdings record bibliographic record ID	Polaris.SHRCopies	BibRecordID
Holdings record call no prefix	Polaris.SHRCopies	CallNoPrefix
Holdings record classification no	Polaris.SHRCopies	ClassificationNo
Holdings record completeness code	Polaris.SHRCopies	CompletenessCodeH
Holdings record completeness description	Polaris.MfhdCompleteness	Description
Holdings record copy number	Polaris.SHRCopies	CopyNumber
Holdings record creation date	Polaris.SHRCopies	CreationDate
Holdings record creator ID	Polaris.SHRCopies	CreatorID
Holdings record creator name	Polaris.PolarisUsers	Name
Holdings record cutter no	Polaris.SHRCopies	CutterNo
Holdings record destination collection abbreviation	Polaris.Collections	Abbreviation
Holdings record destination collection ID	Polaris.SHRCopies	DestinationCollectionID
Holdings record destination collection name	Polaris.Collections	Name
Holdings record destination organization abbreviation	Polaris.Organizations	Abbreviation
Holdings record destination organization ID	Polaris.SHRCopies	DestinationOrgID
Holdings record destination organization name	Polaris.Organizations	Name
Holdings record ID	Polaris.SHRCopies	CopyID
Holdings record imported bib control number	Polaris.SHRCopies	ImportedBibCN
Holdings record imported holdings copy number	Polaris.SHRCopies	ImportedHoldingsCN
Holdings record imported record source	Polaris.SHRCopies	ImportedRecordSource
Holdings record intent to cancel	Polaris.SHRCopies	IntentToCancel
Holdings record list server address	Polaris.SHRCopies	ListServerAddr
Holdings record material type description	Polaris.MaterialTypes	Description
Holdings record material type ID	Polaris.SHRCopies	MaterialTypeID
Holdings record max claims	Polaris.SHRCopies	MaxClaims
Holdings record member name	Polaris.SHRCopies	MemberName
Holdings record member organization name	Polaris.SHRCopies	MemberOrgName

List Box Text	*Database Table*	*Database Column*
Holdings record membership designation	Polaris.SHRCopies	MembershipDesignation
Holdings record modifier name	Polaris.PolarisUsers	Name
Holdings record modification date	Polaris.SHRCopies	LastTransaction
Holdings record modifier ID	Polaris.SHRCopies	ModifierID
Holdings record note non public	Polaris.SHRCopies	NoteNonPub
Holdings record note staff	Polaris.SHRCopies	NoteStaff
Holdings record order type description	Polaris.OrderTypes	OrderType
Holdings record order type ID	Polaris.SHRCopies	OrderType
Holdings record ordering organization abbreviation	Polaris.Organizations	Abbreviation
Holdings record ordering organization ID	Polaris.SHRCopies	OrganizationID
Holdings record ordering organization name	Polaris.Organizations	Name
Holdings record plan description	Polaris.SHRCopies	PlanDescr
Holdings record plan name	Polaris.SHRCopies	PlanName
Holdings record public note	Polaris.RWRITERReportTables	SHRPublicNote
Holdings record retention note	Polaris.RWRITERReportTables	SHRRetentionNote
Holdings record shelving scheme description	Polaris.ShelvingSchemes	Description
Holdings record shelving scheme ID	Polaris.SHRCopies	ShelvingSchemeID
Holdings record start date	Polaris.SHRCopies	StartDate
Holdings record start number	Polaris.SHRCopies	StartNumber
Holdings record subscription status description	Polaris.CopySubsStatuses	Description
Holdings record subscription status ID	Polaris.SHRCopies	SubscrStatusH
Issue/Part note non public	Polaris.MfhdIssues	NoteNonPub
Issue/Part chronology date	Polaris.MfhdIssues	ChronologyDate
Issue/Part claim creation date	Polaris.Claims	ClaimDate
Issue/Part claim note	Polaris.Claims	ClmNote
Issue/Part claim reason	Polaris.Claims	ClaimReason
Issue/Part designation	Polaris.Claims	Designation
Issue/Part expected arrival date	Polaris.Claims	ExpectArrivalDate
Issue/Part ID	Polaris.MfhdIssues	IssueID
Issue/Part note public	Polaris.MfhdIssues	NotePub
Issue/Part note non public	Polaris.MfhdIssues	NoteNonPub
Issue/Part note non public warning	Polaris.MfhdIssues	NoteStaff

List Box Text	Database Table	Database Column
Issue/Part status ID	Polaris.MfhdIssues	IssueStatusID
Issue/Part status date	Polaris.MfhdIssues	IssueStatusDate
Issue/Part status description	Polaris.MfhdIssueStatuses	StatusDesc
Publication pattern category description	Polaris.MfhdCategories	Description
Publication pattern category ID	Polaris.MfhdPublicationPatterns	CategoryID
Publication pattern ID	Polaris.MfhdPublicationPatterns	PubPatternID
Subscription ID	Polaris.SHRCopies	SubsID
Subscription fund ID	Polaris.Subscriptions	FundID
Subscription fund name	Polaris.Funds	name
Subscription identifier	Polaris.Subscriptions	Identifier
Subscription note	Polaris.Subscriptions	Note
Subscription payment method description	Polaris.PaymentMethods	PaymentMethod
Subscription payment method ID	Polaris.Subscriptions	PaymentMethodID
Subscription renew instruction	Polaris.Subscriptions	RenewInstruction
Subscription status	Polaris.Subscriptions	Status
Subscription term	Polaris.Subscriptions	SubscriptionTerm
Supplier Columns		
Supplier Columns for Serials, Order, and Invoice Reports		
The available supplier columns depend on the report type. The supplier columns for order reports are derived from the Polaris.RwriterPurchseOrderFiscalYears table. The supplier columns for invoice reports are derived from the Polaris.RwriterInvoiceFiscalYears table.		
Supplier ID	Polaris.Subscriptions	SupplierID
Supplier alternative name	Polaris.Suppliers	SupplierRecordName
Supplier library account number	Polaris.RwriterPurchseOrderFiscalYears	SupplierLBAccountNumber
Supplier name	Polaris.Suppliers	SupplierName
Supplier note	Polaris.Suppliers	Note
Supplier organization abbreviation	Polaris.RwriterPurchseOrderFiscalYears	SupplierOrganizationAbbr
Supplier organization name	Polaris.RwriterPurchseOrderFiscalYears	SupplierOrganizationName
Supplier plan note	Polaris.RwriterPurchseOrderFiscalYears	SupplierPlanNote
Supplier record name	Polaris.Suppliers	RecordName
Supplier SAN	Polaris.Suppliers	SupplierSAN
Supplier SAN prefix	Polaris.Suppliers	SupplierSANPre
Supplier SAN suffix	Polaris.Suppliers	SupplierSANSuf

List Box Text	Database Table	Database Column
Fund Columns		
Fund Columns for Fund, Order, and Invoice Reports		
The available fund columns depend on the report type. *The fiscal year and fund currency columns for order reports are derived from the Polaris.RwriterPurchseOrderFiscalYears table.* *The fiscal year and fund currency columns for invoice reports are derived from the Polaris.RwriterInvoiceFiscalYears table.* *Other fund columns for order reports are derived from the Polaris.RwriterPOlineSegmentView table.* *Other fund columns for invoice reports are derived from the Polaris.RwriterInvlineSegmentView table.*		
Fiscal year creation date	Polaris.FiscalYears	CreationDate
Fiscal year end date	Polaris.FiscalYears	FYEndDate
Fiscal year owner ID	Polaris.FiscalYears	OrganizationID
Fiscal year ID	Polaris.Funds	FiscalYearID
Fiscal year name	Polaris.FiscalYears	Name
Fiscal year notes	Polaris.FiscalYears	Notes
Fiscal year owner abbreviation	Polaris.Organizations	Abbreviation
Fiscal year owner name	Polaris.Organizations	Name
Fiscal year start date	Polaris.FiscalYears	FYStartDate
Fiscal year status	Polaris.FiscalYearStatus	Status
Fiscal year status date	Polaris.FiscalYears	StatusDate
Fiscal year status ID	Polaris.FiscalYears	FiscalYearStatusID
Fund alternative name	Polaris.Funds	AlternativeName
Fund amount expended year-to-date	Polaris.Funds	AmtExpYTD
Fund begining allocation	Polaris.Funds	BegAllocation
Fund carry-over allocation	Polaris.Funds	CarryOverAlloc
Fund cash balance	Polaris.Funds	CashBalance
Fund category	Polaris.FundCategories	Category
Fund category ID	Polaris.Funds	CategoryID
Fund creation date	Polaris.Funds	CreationDate
Fund creator ID	Polaris.Funds	CreatorID
Fund creator name	Polaris.PolarisUsers	Name
Fund deposit funds used	Polaris.Funds	DepFundsUsed
Fund donor corporate name	Polaris.Donors	CorporateName
Fund donor description note	Polaris.Donors	DescriptionNote
Fund donor Email	Polaris.Donors	Email
Fund donor Fax	Polaris.Donors	Fax

List Box Text	*Database Table*	*Database Column*
Fund donor first name	Polaris.Donors	FirstName
Fund donor last name	Polaris.Donors	LastName
Fund donor memorial note	Polaris.Donors	MemorialNote
Fund donor middle name	Polaris.Donors	MiddleName
Fund donor phone	Polaris.Donors	Phone
Fund donor renewal date	Polaris.Donors	RenewalDate
Fund donor restriction note	Polaris.Donors	RestrictionNote
Fund external name	Polaris.Funds	ExtName
Fund free balance	Polaris.Funds	FreeBal
Fund ID	Polaris.Funds	FundID
Fund last status update date	Polaris.Funds	StatusDate
Fund modification date	Polaris.Funds	ModificationDate
Fund modifier ID	Polaris.Funds	ModifierID
Fund modifier name	Polaris.PolarisUsers	Name
Fund name	Polaris.Funds	Name
Fund note	Polaris.Funds	Note
Fund or encumbrance or expenditure option	Polaris.FundEncExpOptions	FundEncExpOption
Fund or encumbrance or expenditure option ID	Polaris.Funds	FundEncExpOptionID
Fund owning organization abbreviation	Polaris.Organizations	Abbreviation
Fund owning organization name	Polaris.Organizations	Name
Fund parent fund fiscal year ID	Polaris.Funds	ParentFundFiscalYearID
Fund parent fund ID	Polaris.Funds	ParentFundID
Fund status	Polaris.FundStatus	Status
Fund status ID	Polaris.Funds	FundStatusID
Fund total amount allocated	Polaris.Funds	TotAlloc
Fund total amount encumbered	Polaris.Funds	TotCurrEnc
Fund total amount expended	Polaris.Funds	TotExp
Fund total percent expended	Polaris.Funds	PercentExpYTD
Fund transaction history creator ID	Polaris.FundTransactionHistories	UserID
Fund transaction history creator name	Polaris.PolarisUsers	Name
Fund transaction history ID	Polaris.FundTransactionHistories	FundTransactionHistID
Fund transaction history invoice line item number	Polaris.FundTransactionHistories	OrdInvLINumber

List Box Text	*Database Table*	*Database Column*
Fund transaction history invoice number	Polaris.FundTransactionHistories	OrdInvNumber
Fund transaction history invoice number suffix	Polaris.FundTransactionHistories	OrdInvNumberSuf
Fund transaction history note	Polaris.FundTransactionHistories	FundTransNote
Fund transaction history source	Polaris.FundTransactionHistories	FundTransSource
Fund transaction history transaction type ID	Polaris.FundTransactionHistories	FundTransactionTypeID
Fund transaction history type	Polaris.FundTransactionTypes	FundTransType
Fund type	Polaris.FundTypes	Type
Fund type ID	Polaris.Funds	TypeID
Funding source	Polaris.Funds	FundingSource
Fund Columns for Fund Summary Reports Only		
Sum amount expended year-to-date	Polaris.Funds	ParentFundID
Sum begining allocation	Polaris.Funds	TotAlloc
Sum carry-over allocation	Polaris.Funds	StatusDate
Sum deposit funds used	Polaris.Funds	TotExp
Sum free balance	Polaris.Funds	CategoryID
Sum item price	Polaris.Funds	CreatorID
Sum total amount allocated	Polaris.BibliographicRecords	PublicationYear
Sum total amount deposited	Polaris.BibliographicRecords	PrimaryMARCTOMID
Sum total amount encumbered	Polaris.BibliographicRecords	FirstAvailableDate
Sum total amount expended	Polaris.BibliographicRecords	CreationDate
Sum transaction history amount	Polaris.Organizations	Abbreviation

List Box Text	*Database Table*	*Database Column*
Invoice Columns		
Invoice Columns for Invoice List and Summary Reports		
Invoice creation date	Polaris.RwriterInvHeaderView	InvCreationDate
Invoice creator name	Polaris.RwriterInvHeaderView	InvCreatorName
Invoice credit memo number	Polaris.RwriterInvHeaderView	InvoiceCreditMemoNumber
Invoice date	Polaris.RwriterInvHeaderView	InvDate
Invoice EDI file name	Polaris.RwriterInvHeaderView	InvoiceEDIFileName
Invoice header exchange rate	Polaris.RwriterInvHeaderView	InvoiceExchangeRate
Invoice header grand total	Polaris.RwriterInvHeaderView	InvHeaderInvGrandTotalBase
Invoice header material subtotal	Polaris.RwriterInvHeaderView	InvHeaderInvMaterialSubtotalBase
Invoice header sales tax rate	Polaris.RwriterInvHeaderView	InvHeaderSalesTaxRate1
Invoice header sales tax	Polaris.RwriterInvHeaderView	InvHeaderSalesTax1Base
Invoice ID	Polaris.RwriterInvoiceFiscalYears	InvoiceID
Invoice line amount	Polaris.RwriterInvlineView	InvoiceLineAmount
Invoice line item ID	Polaris.RwriterInvlineView	InvLineItemID
Invoice line material type	Polaris.RwriterInvlineView	InvoiceLineMaterialType
Invoice line number	Polaris.RwriterInvlineView	InvoiceLineNumber
Invoice line payment status	Polaris.RwriterInvlineView	InvoiceLinePaymentStatus
Invoice line quantity paid	Polaris.RwriterInvlineView	InvoiceLineQtyPaid
Invoice line quantity received	Polaris.RwriterInvlineView	InvoiceLineQtyRec
Invoice modification date	Polaris.RwriterInvHeaderView	InvModificationDate
Invoice modifier	Polaris.RwriterInvHeaderView	InvModifier
Invoice note	Polaris.RwriterInvHeaderView	InvNote
Invoice number	Polaris.RwriterInvHeaderView	InvNumber
Invoice number of lines	Polaris.RwriterInvHeaderView	NumberOfLines
Invoice number suffix	Polaris.RwriterInvHeaderView	InvNumberSuffix
Invoice organization abbr	Polaris.RwriterInvHeaderView	InvOrganizationAbbr
Invoice organization name	Polaris.RwriterInvHeaderView	InvOrganizationName
Invoice payment method	Polaris.RwriterInvHeaderView	PaymentMethod
Invoice quantity paid	Polaris.RwriterInvoiceChargeAggregates	InvoiceTotalQtyPaid
Invoice quantity received	Polaris.RwriterInvoiceChargeAggregates	InvoiceTotalQtyRec
Invoice receive date	Polaris.RwriterInvHeaderView	InvReceiptDate
Invoice status	Polaris.RwriterInvHeaderView	InvoiceStatus

List Box Text	*Database Table*	*Database Column*
Invoice status date	Polaris.RwriterInvHeaderView	InvStatusDate
Invoice type	Polaris.RwriterInvHeaderView	InvoiceType
Payment status date	Polaris.RwriterPaymentHistories	InvoicePaymentStatusDate
Plan name	Polaris.RwriterInvHeaderView	PlanName
PO number	Polaris.RwriterlineView	PONumber
Segment amount credited	Polaris.RwriterInvLineSegmentView	SegmentAmountCreditedBase
Segment destination collection abbr	Polaris.RwriterInvLineSegmentView	SegmentDestinationCollectionAbbr
Segment destination collection name	Polaris.RwriterInvLineSegmentView	SegmentDestinationCollectionName
Segment destination organization abbreviation	Polaris.RwriterInvLineSegmentView	SegmentDestinationOrganizationAbbr
Segment destination organization name	Polaris.RwriterInvLineSegmentView	SegmentDestinationOrganizationName
Segment grand total	Polaris.RwriterInvLineSegmentView	SegmentGrandTotalBase
Segment payment status	Polaris.RwriterInvLineSegmentView	SegmentPaymentStatus
Segment quantity rec	Polaris.RwriterInvLineSegmentView	SegmentQuantityRec
Segment sales tax1	Polaris.RwriterInvLineSegmentView	SegmentSalesTax1Base
Segment sales tax2	Polaris.RwriterInvLineSegmentView	SegmentSalesTax2Base
Segment total discount price	Polaris.RwriterInvLineSegmentView	SegmentTotalDiscountPriceBase
Shipped date	Polaris.RwriterInvHeaderView	ShippedDate
Supplier library account number	Polaris.RwriterInvoiceFiscalYears	SupplierLBAcctNumber
Supplier name	Polaris.RwriterInvoiceFiscalYears	SupplierName
Supplier organization abbreviation	Polaris.RwriterInvoiceFiscalYears	SupplierOrganizationAbbr
Supplier organization name	Polaris.RwriterInvoiceFiscalYears	SupplierOrganizationName
Supplier plan note	Polaris.RwriterInvoiceFiscalYears	SupplierPlanNote
Supplier record name	Polaris.RwriterInvoiceFiscalYears	SupplierRecordName
Supplier SAN	Polaris.RwriterInvoiceFiscalYears	SupplierSAN
Sum invoice quantity paid	Polaris.RwriterInvoiceChargeAggregates	InvoiceTotalQtyPaid
Sum invoice quantity received	Polaris.RwriterInvoiceChargeAggregates	InvoiceTotalQtyRec
Total (Sum) cat service charges	Polaris.RwriterInvoiceChargeAggregates	TotalCatServChargeBase
Total (Sum) other charges	Polaris.RwriterInvoiceChargeAggregates	TotalOtherChargeBase
Total (Sum) service charge	Polaris.RwriterInvoiceChargeAggregates	TotalServiceChargeBase
Total (Sum) ship charge	Polaris.RwriterInvoiceChargeAggregates	TotalShipChargeBase
Total (Sum) special handling charge	Polaris.RwriterInvoiceChargeAggregates	TotalSpecialHandlingChargeBase
Voucher check date	Polaris.RwriterInvHeaderView	VoucherCheckDate

List Box Text	*Database Table*	*Database Column*
Voucher date	Polaris.RwriterInvHeaderView	VoucherDate
Voucher number	Polaris.RwriterInvHeaderView	VoucherNumber
Invoice Columns for Invoice Summary Reports Only		
Sum segment binding charges	Polaris.RwriterInvLineSegmentView	SegmentBindFormatChargeBase
Sum segment cataloging service charges	Polaris.RwriterInvLineSegmentView	SegmentCatServChargeBase
Sum segment other charges	Polaris.RwriterInvLineSegmentView	SegmentOtherChargeBase
Sum segment service charges	Polaris.RwriterInvLineSegmentView	SegmentServChargeBase
Sum segment shipping charges	Polaris.RwriterInvLineSegmentView	SegmentShipChargeBase

List Box Text	*Database Table*	*Database Column*
Purchase Order Columns		
Purchase Order Columns for Order Reports		
Purchase order creation date	Polaris.RwriterPOHeaderView	POCreationDate
Purchase order creator name	Polaris.RwriterPOHeaderView	POCreatorName
Purchase order external ID	Polaris.RwriterPOHeaderView	POExternalID
Purchase order date	Polaris.RwriterPOHeaderView	PODate
Purchase order ID	Polaris.RwriterPurchseOrderFiscalYears	PurchaseOrderID
Purchase order line amount	Polaris.RwriterPOlineView	POLineAmount
Purchase order header discount rate	Polaris.RwriterPOHeaderView	POHeaderDiscountRate
Purchase order header exchange rate	Polaris.RwriterPOHeaderView	POHeaderExchangeRate
Purchase order line item note	Polaris.RwriterPOlineView	PoLineNoteSupplier
Purchase order line item public note	Polaris.RwriterPOlineView	POLineNotePub
Purchase order line non-public note	Polaris.RwriterPOlineView	POLineNoteStaff
Purchase order line number	Polaris.RwriterPOlineView	POLineNumber
Purchase order line rental return date	Polaris.RwriterPOlineView	POLineRentalReturnDate
Purhcase order line status	Polaris.RwriterPOlineView	POLineStatus
Purchase order modification date	Polaris.RwriterPOHeaderView	POModificationDate
Purchase order modifier name	Polaris.RwriterPOHeaderView	POModifierName
Purchase order number	Polaris.RwriterPOHeaderView	PONumber
Purchase order number of lines	Polaris.RwriterPOHeaderView	PONumberofLines
Purchase order suffix	Polaris.RwriterPOHeaderView	PONumberSuffix
Purchase order type	Polaris.RwriterPOHeaderView	POOrderType
Purchase order organization abbreviation	Polaris.RwriterPOHeaderView	POOrganizationAbbr
Purchase order organization name	Polaris.RwriterPOHeaderView	POOrganizationName
Purchase order payment method	Polaris.RwriterPOHeaderView	POHeaderPaymentMethod
Purchase order plan name	Polaris.RwriterPOHeaderView	POPlanName
Purchase order release date	Polaris.RwriterPOHeaderView	POReleaseDate
Purchase order rental return date	Polaris.RwriterPOHeaderView	PORentalReturnDate
Purchase order ship date	Polaris.RwriterPOHeaderView	POShipDate
Purchase order shipping method	Polaris.RwriterPOHeaderView	POShippingMethod
Purchase order status	Polaris.RwriterPOHeaderView	POHeaderOrderStatus
Purchase order status date	Polaris.RwriterPOHeaderView	POStatusDate
Sum purchase order header cat serv charge	Polaris.RwriterPOHeaderView	POHeaderCatServChargeBase

List Box Text	Database Table	Database Column
Sum purchase order header discount rate	Polaris.RwriterPOHeaderView	POHeaderDiscountRate
Sum purchase order header grand total	Polaris.RwriterPOHeaderView	POHeaderGrandTotBase
Sum purchase order header sales tax 1	Polaris.RwriterPOHeaderView	POHeaderSalesTax1Base
Sum purchase order header service charges	Polaris.RwriterPOHeaderView	POHeaderServiceChargeBase
Sum purchase order header shipping charge	Polaris.RwriterPOHeaderView	POHeaderShippingChargeBase
Sum purchase order header special hand charges	Polaris.RwriterPOHeaderView	POHeaderSpecialHandChargeBase
Sum purchase order number of lines	Polaris.RwriterPOAggregates	POnLines
Sum purchase order quantity cancelled	Polaris.RwriterPOAggregates	POQtyCancelled
Sum purchase order quantity claimed	Polaris.RwriterPOAggregates	POQtyClaimed
Sum purchase order quantity invoiced	Polaris.RwriterPOAggregates	POQtyInv
Sum purchase order quantity ordered	Polaris.RwriterPOAggregates	POQtyOrdered
Sum purchase order quantity received	Polaris.RwriterPOAggregates	POQtyReceived
Sum segment amount encumbered	Polaris.RwriterPolineSegmentView	SegmentAmountEncumbered
Sum segment amount expended	Polaris.RwriterPolineSegmentView	SegmentAmountExpended
Purchase Order Columns for Order Summary Reports Only		
Sum segment binding charge	Polaris.RwriterPolineSegmentView	SegmentBindFormatChargeBase
Sum segment cataloging service charges	Polaris.RwriterPolineSegmentView	SegmentCatServChargeBase
Sum segment grand total	Polaris.RwriterPolineSegmentView	SegmentGrandTotalSegmentBase
Sum segment other charges	Polaris.RwriterPolineSegmentView	SegmentOtherChargeBase
Sum segment quantity ordered	Polaris.RwriterPolineSegmentView	SegmentQuantOrd
Sum segment quantity received	Polaris.RwriterPolineSegmentView	SegmentQuantRec
Sum segment service charges	Polaris.RwriterPolineSegmentView	SegmentServChargeBase
Sum segment shipping charges	Polaris.RwriterPolineSegmentView	SegmentShipChargeBase

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