Guide to SimplyReports

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What is SimplyReports?

SimplyReports gathers data from the Polaris database, allowing you to create reports about your patrons, patron account transactions, holds, and items. SimplyReports provides you with information you would expect to find in the Reports and Notices feature in the Polaris Integrated Library System, yet is more robust and gives you more control. SimplyReports allows you to select the values, parameters, and format to create truly customizable reports.

Use the following guide to familiarize yourself with the features of SimplyReports. It explains the tabs, subtabs, and filters found in SimplyReports. There is also a listing of sample reports to get you started.

Goal of Guide to SimplyReports

Upon successful completion of this Guide, you will be able to:

1. Locate common controls.
2. Navigate within the application.
3. Construct custom reports for use in your library.

To successfully complete this objective, you should be able to:

1. Differentiate between the patron, patron account, holds, and items tabs and subtabs.
2. Identify the necessary parameters for the report you would like to create.
3. Locate and select necessary parameters.
4. Sort the parameters in the appropriate order.
5. Apply relevant filters to refine the report.
6. Execute the creation of the report.
7. Modify, if necessary, report parameters in order to refine the report output.

SimplyReports Tips:

- If you select a filter by checking the check box and *do not* select a value by highlighting it, SimplyReports will use *all* the values. For instance, if you check "Collection" in the Item general filters but do not highlight a specific collection, the report will gather data and show all the collections.
- To select more than one value in a menu, hold down the **CTRL** key and click on the values. To deselect one value when many are selected, hold down the **CTRL** key and click on the value you want to deselect.
- To select a block of values, click on the value at the top of the list to highlight it and then hold down the **SHIFT** key and select the value at the bottom of the list of values you want to select. This will highlight all the values in that range.
- If you do not move the values from the **Columns selected for output** list into the **Columns selected for sort**, the report you create will be sorted by the order they appear in the **Columns selected for output** list.
- You can safely maximize (+) and minimize (-) the filter lists while creating a report without losing the information you select.

Patron Tab

When you select the ***Patron*** tab, you will be able to create reports using data from patron registration records, records associated with patron records, and transactions involving patron records.

Select Report

To get started, select a sub-tab:

Patron list reports will create reports with detailed patron information, such as names and addresses, if specified in the output columns. Example: show the names of patrons with three or more lost items.

Patron count reports will create reports with the number of patron records that meet the criteria you set. Example: show the number of patrons your branch has by postal code.

Patron statistical reports will gather data the list and count reports retrieve, but will also gather data on transactions. Example: show the number of check out transactions by workstation on an hourly basis for a given period of time.

Select Limits

1. If you are performing a Patron list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
2. Likewise, if you are performing either a Patron list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

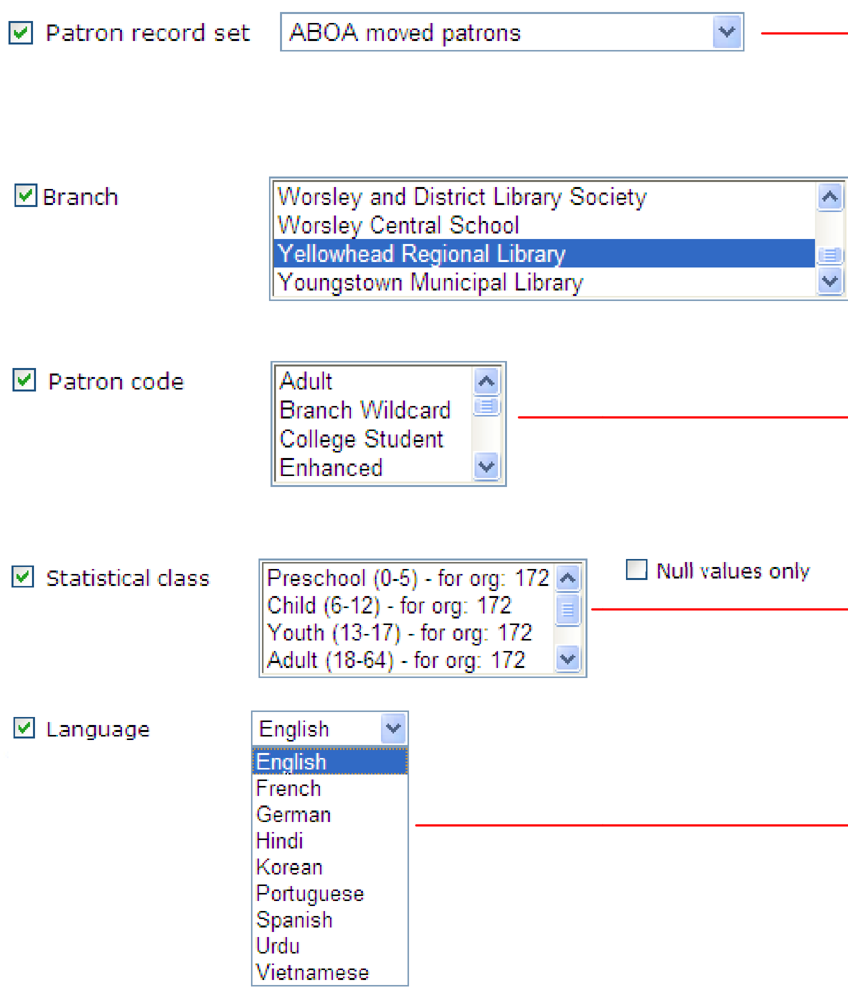
Select Data and Format

1. Select one or more lines from the **Report output columns** list.
2. Click to move the entries into the **Columns selected for output** list.
3. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click to copy them into the **Columns selected for sort list**.
4. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

Select Filters and Submit Data

See the following pages for an explanation of the various filters.
Click **Submit** once all parameters have been selected.

Patron Filters



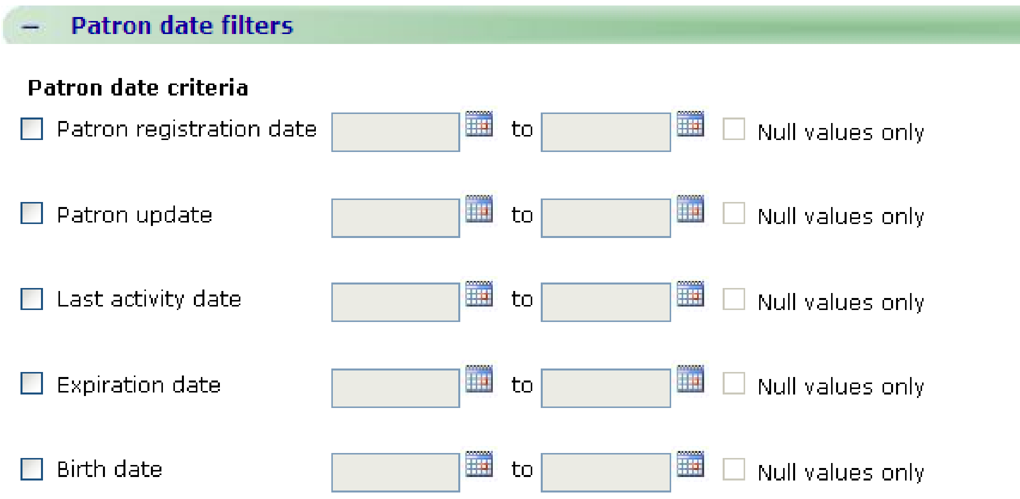
If your library has created a record set, this feature will limit output to the records belonging to that specific set.

Select your library to limit output to only your library information. If you wish to choose more than one library, click on the library while holding the **CTRL** key.

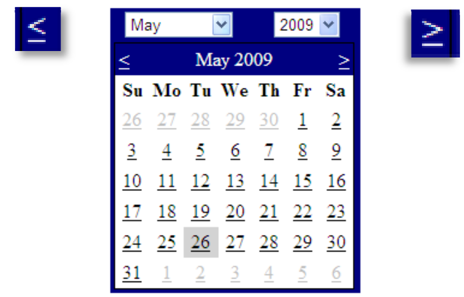
Selecting one or more codes from this list will limit output to patron records with those codes.

Selecting a statistic class will limit output to patron records with those classes. You must have the branch filter selected in order to use this filter.
Selecting **Null values only** limits reports to patrons who do not have a statistical class.

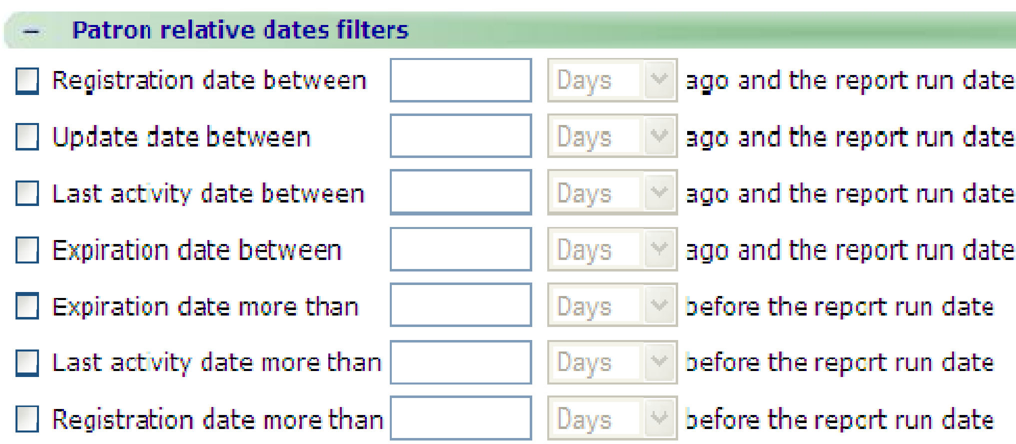
Limits output to patron records that indicate any of the selected languages as the person's preferred language.



In order to filter by date, you must select *from* and *to* dates using the calendar icons. Use the drop down menu or click on the arrows or calendar to select specific dates.

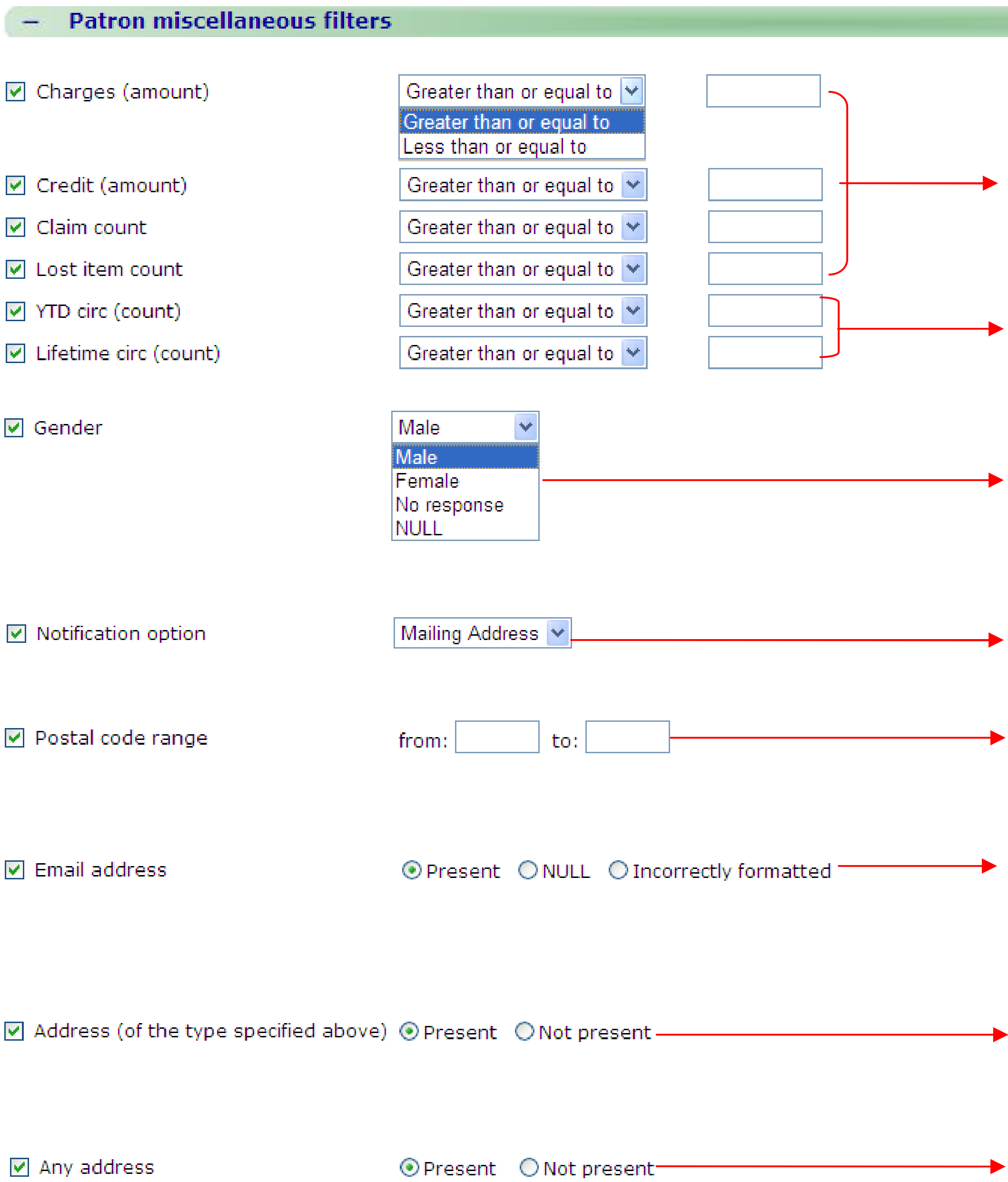


If you select **Null values only**, it will only retrieve records where the date field is empty.



Relative date filters limit the results to dates within a certain period before the report run date, or dates earlier than a selected number of days before the run date.

If you would like to save the parameters of a report to run again another time, use the relative date filter to ensure your dates don't stay the same.



Specify the report to include patrons who have charges, credits, claims, and/or losses greater than, less than or equal to the dollar amount that you set.

Limit reports to patrons who have checked out or renewed as many items or more/less times than the number in the box.

Limit the output to only male or female patrons, or to patrons who have either nothing or N/A checked off in their record.

Limit the output to patrons with specific delivery methods.

Limit to patrons within a postal code range.

Present limits to patrons with an email address; **NULL** limits to patrons without an email address; **Incorrectly formatted** limits to incorrectly formatted addresses.

Limit reports to records with the selected address type. **Not present** limits to records that do not have an address of that type.

Limit reports to records with or without any type of address.

Patron user defined fields filters

(User 1) Where They Live — Null values only

(User 2) Parent/Guardian (LastName, FirstName) — Null values only

(User 3) Local Library Statistic #1 — Null values only

(User4) Local Library Statistic #2 — Null values only

(User 5) Local Library Statistic #3 — Null values only

Limit reports by the user-defined fields that are set up in the Patron Record workform.

Select **Null values only** to limit to records without any assigned value.

Patron ID filters

Extract records from patron ID 1

to 210475

The report will be filtered by the patron IDs that are within this range.

Patron Account Tab

When you select the ***Patron Account*** tab, you will be able to create reports using data from patron-related financial transactions in order to track trends, produce lists of financial transactions, and produce statistical reports related to patron financial transactions.

Select Report

To get started, select a sub-tab:

Patron Account list reports will create reports with detailed patron account information. Example: show the names and addresses of patrons with more than $20 in charges.

Patron Account count reports will create reports with counts related to patron account data. Example: show the number of accounts sent to a collection agency.

Patron Account statistical reports will gather data the list and count reports retrieve, but will also gather data on transactions. Example: show the number and total amount of waived transactions by user.

Select Limits

3. If you are performing a Patron Account list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
4. Likewise, if you are performing either a Patron Account list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

Select Data and Format

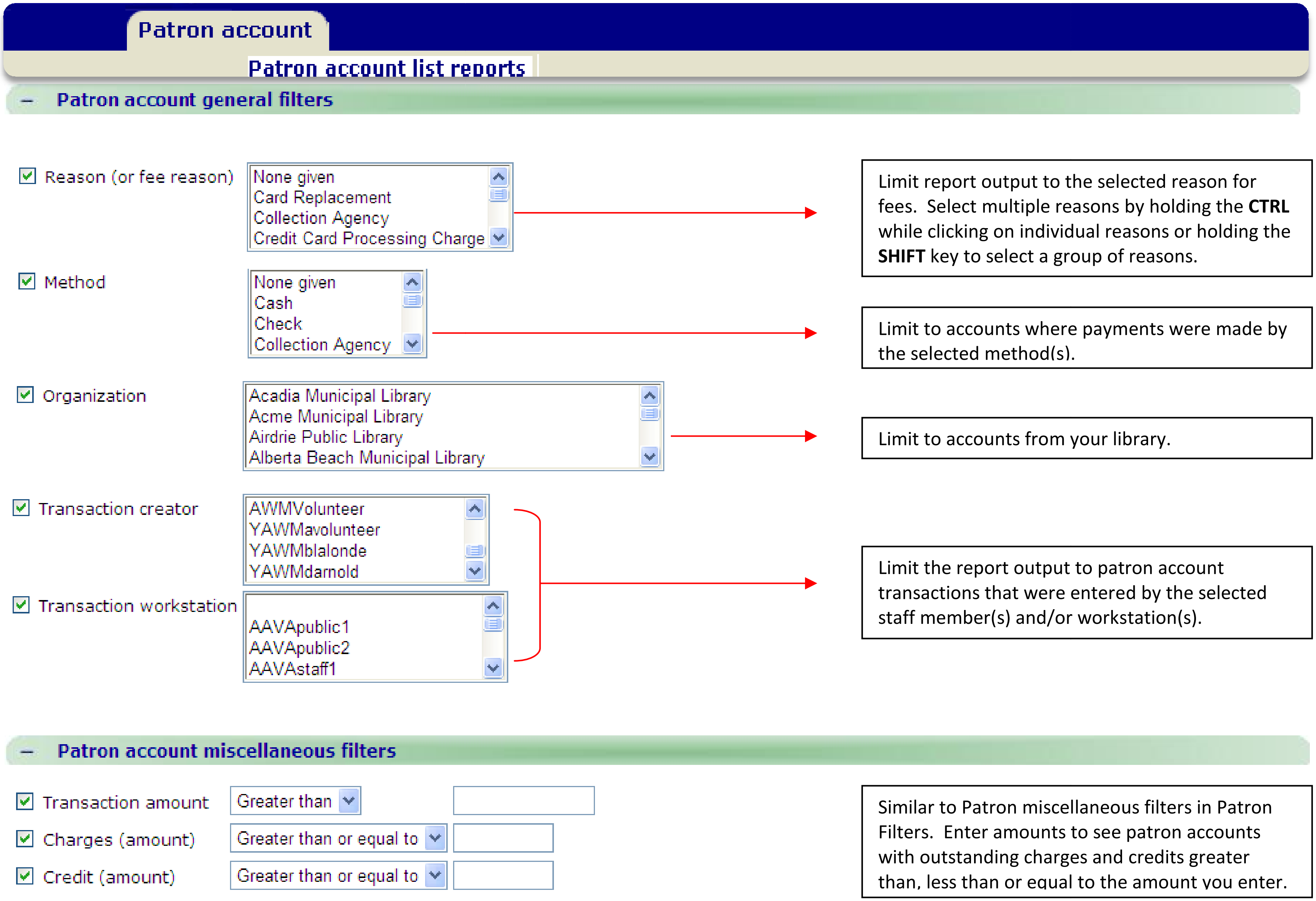
5. Select one or more lines from the **Report output columns** list.
6. Click ▶ to move the entries into the **Columns selected for output** list.
7. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click ▶ to copy them into the **Columns selected for sort list**.
8. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

Select Filters and Submit Data

See the following pages for an explanation of the various filters.

Click **Submit** once all parameters have been selected.

Patron Account Filters



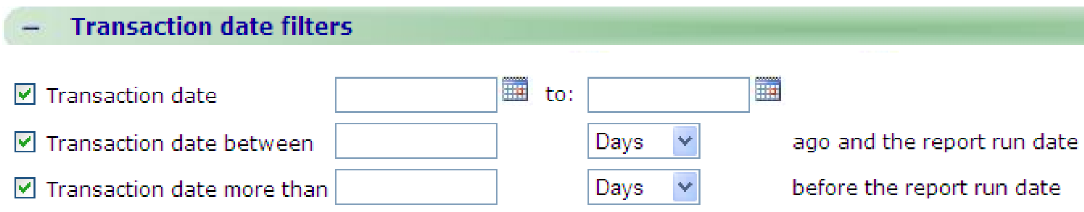
Limit report output to the selected reason for fees. Select multiple reasons by holding the **CTRL** while clicking on individual reasons or holding the **SHIFT** key to select a group of reasons.

Limit to accounts where payments were made by the selected method(s).

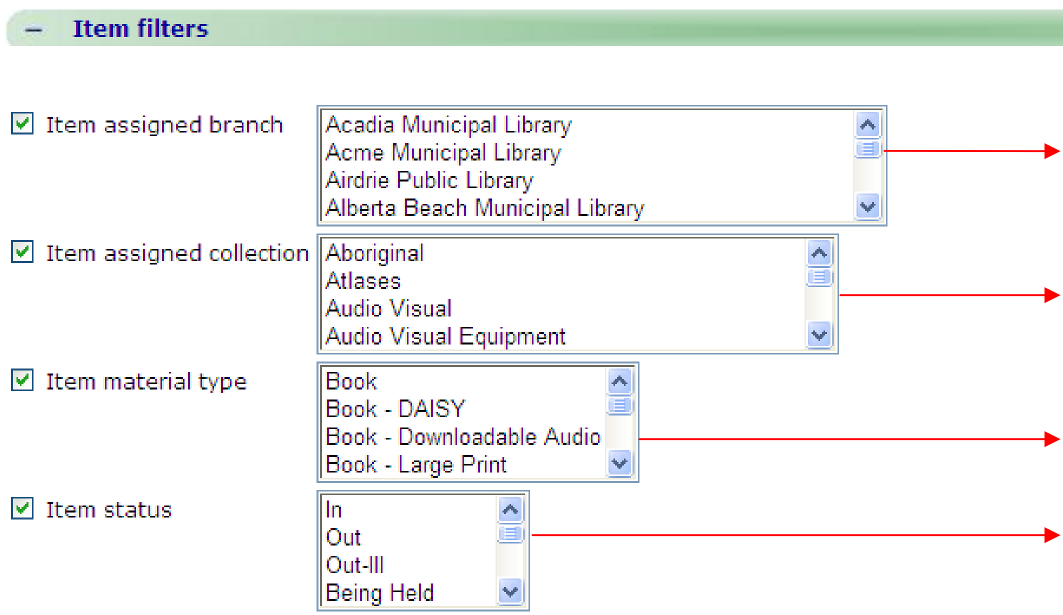
Limit to accounts from your library.

Limit the report output to patron account transactions that were entered by the selected staff member(s) and/or workstation(s).

Similar to Patron miscellaneous filters in Patron Filters. Enter amounts to see patron accounts with outstanding charges and credits greater than, less than or equal to the amount you enter.



Similar to Patron date filters, this filter will limit the report output to transactions within a certain period of time.

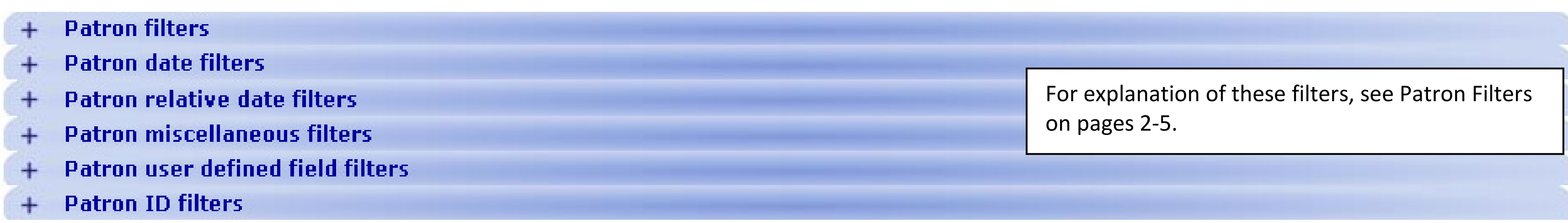


Limit output to transactions involving items that belong to the selected branch.

Limit to a specific collection or collections.

Limit output by selected material type(s).

Limit output by selected item status.



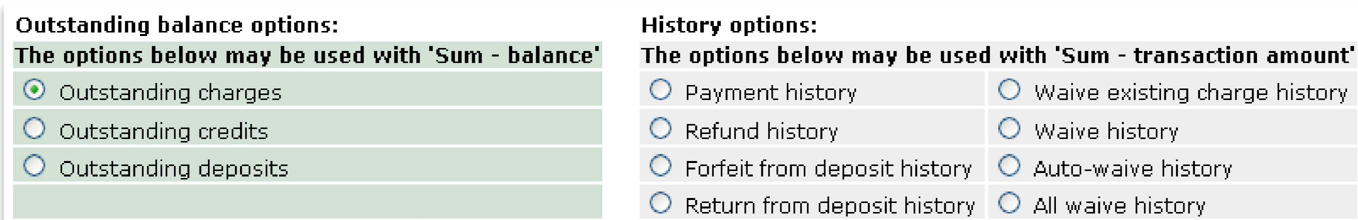
For explanation of these filters, see Patron Filters on pages 2-5.

Transaction Type option for Patron Account List Report

Check the appropriate box to include accounts where:

- there are charges owed
- there are credits
- there are deposits
- there is a zero balance for all credits and charges

Outstanding Balance and History Options for Patron Account Count Report



In order to use this option, you must first select **Sum-balance (outstanding balance only)** in the **Report output column box** and move it to the **Report output column box**. Then select whether you want to view outstanding charges, credits or deposits.

In order to use this option, you must first select **Sum-transaction (history)** in the **Report output column box** and move it to the **Report output column box**. The sum will show the total amount of the history requested.

Holds Tab

When you select the ***Holds*** tab, you will be able to create list, count, and statistical reports about hold requests, records associated with holds requests, and transactions involving hold requests.

Select Report

To get started, select a sub-tab:

Hold list reports will create reports with detailed information on hold requests. Example: show the holds placed during the previous month.

Hold count reports will create reports with counts related to hold requests. Example: show the top 10 requested titles of the month.

Hold statistical reports will gather data the list and count reports retrieve, but will also gather data on transactions. Example: show the number of holds that are created each day during a given time period.

Select Limits

5. If you are performing a Holds list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
6. Likewise, if you are performing either a Holds list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

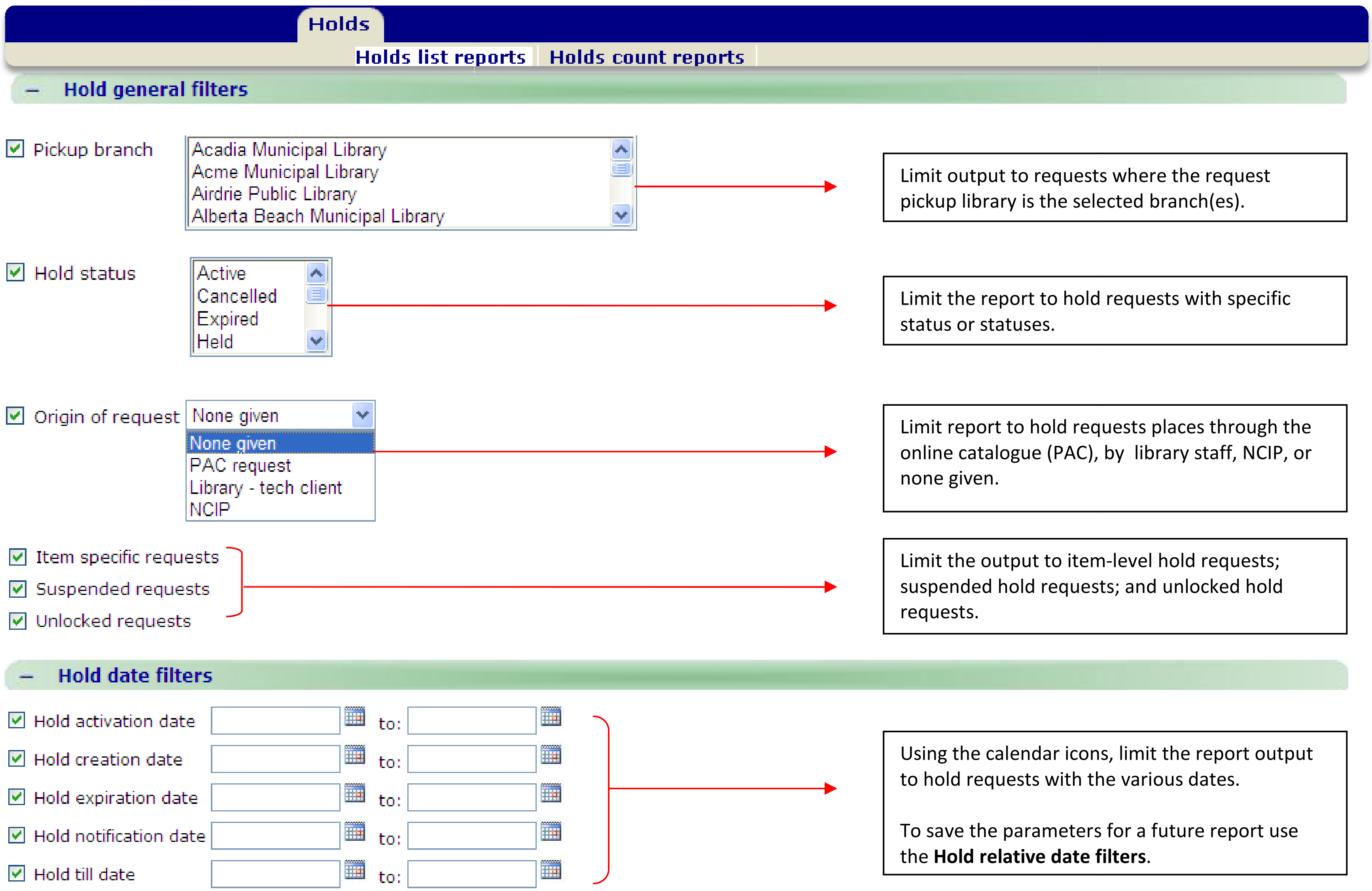
Select Data and Format

9. Select one or more lines from the **Report output columns** list.
10. Click to move the entries into the **Columns selected for output** list.
11. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click to copy them into the **Columns selected for sort list**.
12. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

Select Filters and Submit Data

See the following pages for an explanation of the various filters.
Click **Submit** once all parameters have been selected.

Holds Filters



Limit output to requests where the request pickup library is the selected branch(es).

Limit the report to hold requests with specific status or statuses.

Limit report to hold requests places through the online catalogue (PAC), by library staff, NCIP, or none given.

Limit the output to item-level hold requests; suspended hold requests; and unlocked hold requests.

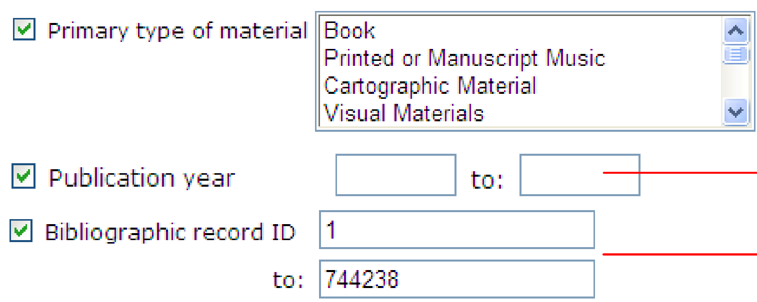
Using the calendar icons, limit the report output to hold requests with the various dates.

To save the parameters for a future report use the **Hold relative date filters**.

– Item filters

See Item filters on page 8.

– Bibliographic record filters

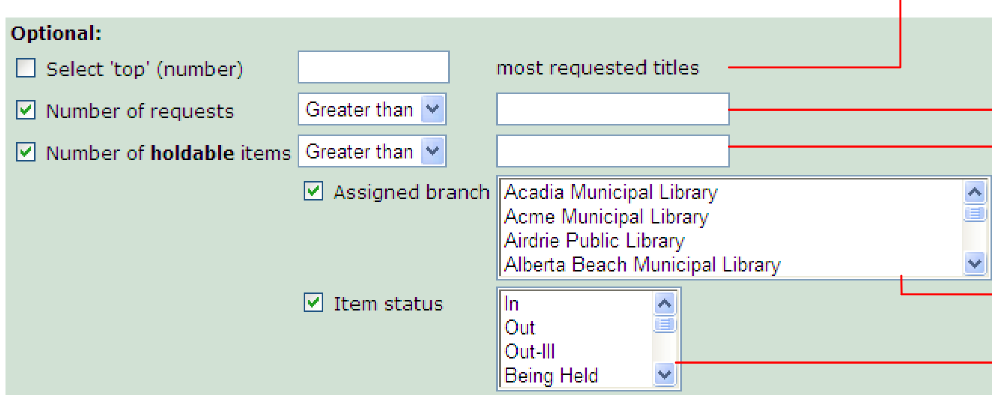


Limit records to specific bibliographic characteristics.

Limit materials by date of publications.

Limit by bibliographic record IDs.

There are **optional filters** in the **Holds count report**.



Type a number to get the top-most requested titles.

Include titles with hold requests greater than, less than or equal to the specified number.

Include titles with a number of holdable items ≥, ≤,or ≠ the number you enter.

Select the library for a count of holds placed on its item records.

Select status or statuses to count holds with these types of statuses.

Items Tab

When you select the ***Items*** tab, you will be able to create list, count, and statistical reports based on item information, such as tracking trends for collection development, creating weeding lists, and following staff activity.

Select Report

To get started, select a sub-tab:

Items list reports will create reports with detailed information on hold requests. Example: create a list of all the other language material you own at your branch.

Items count reports will create reports with counts related to hold requests. Example: get a count of patrons who go to other libraries to check out materials.

Items statistical reports will gather data the list and count reports retrieve, but will also gather data on transactions. Example: see the daily statistics for check out transactions by workstation.

Select Limits

7. If you are performing a Items list report, specify the limits report using the **Maximum number of rows to return** box near the top right side of the page. The default setting is 999,999.
8. Likewise, if you are performing either an Items list or count report, you can specify the address type to use. The default type is **Notice**. The other types are **Invoice**, **Generic**, and **Statement**.

Select Data and Format

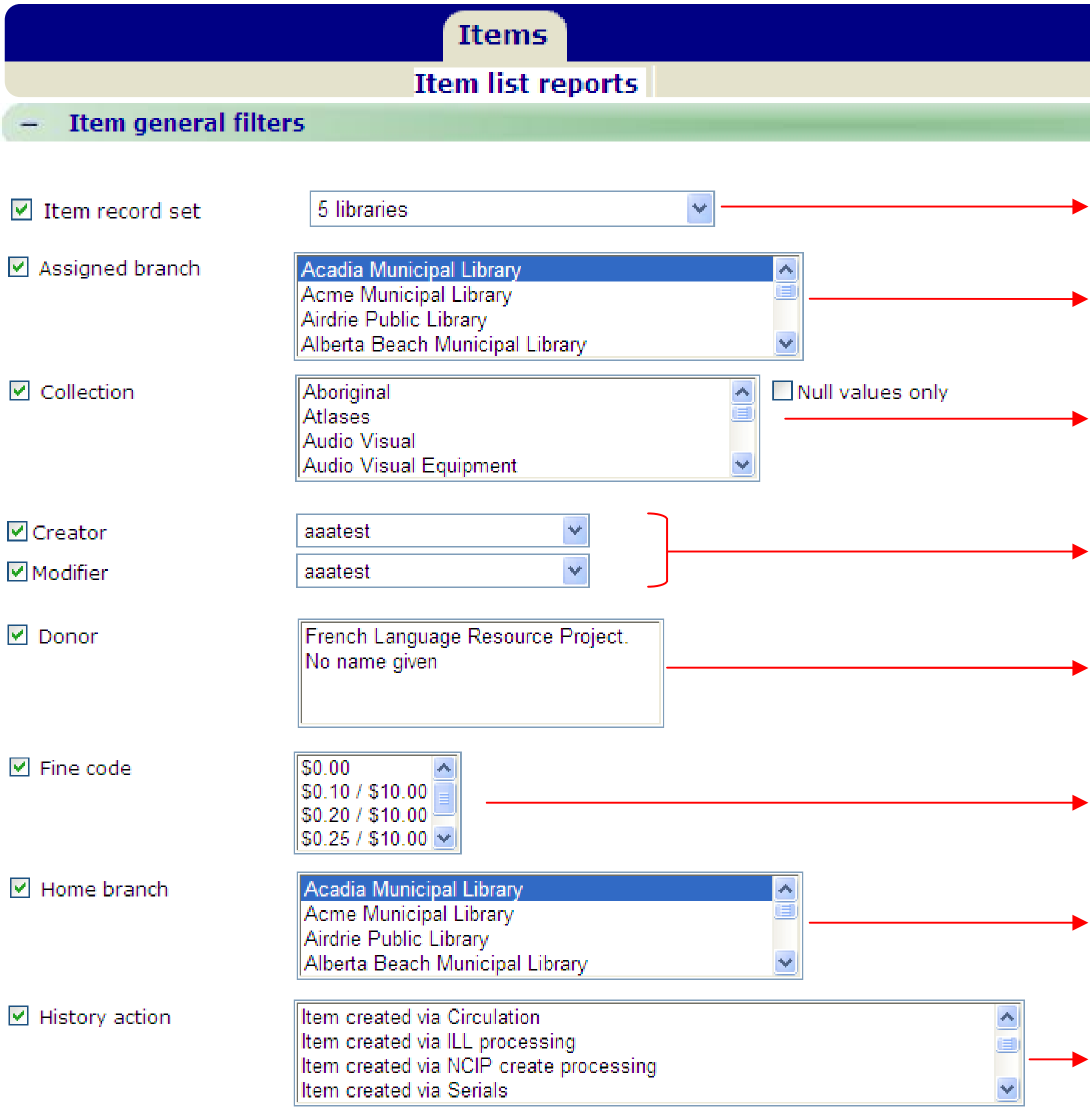
13. Select one or more lines from the **Report output columns** list.
14. Highlight lines by clicking on them and click to move the entries into the **Columns selected for output** list.
15. If you want data sorted within the columns, select the columns in the middle list (the **Columns selected for output list**) and click to copy them into the **Columns selected for sort list**.
16. Below the data lists, you may select the type of file you want your report to be compiled in. Select **Text file** or **Excel file**.

Select Filters and Submit Data

See the following pages for an explanation of the various filters.

Click **Submit** once all parameters have been selected.

Items Filters



Limit report output to a specific record set.

Limit output to the selected assigned branch or branches.

Limit report output to a specific collection. **Null values only** limits to records without a specific collection.

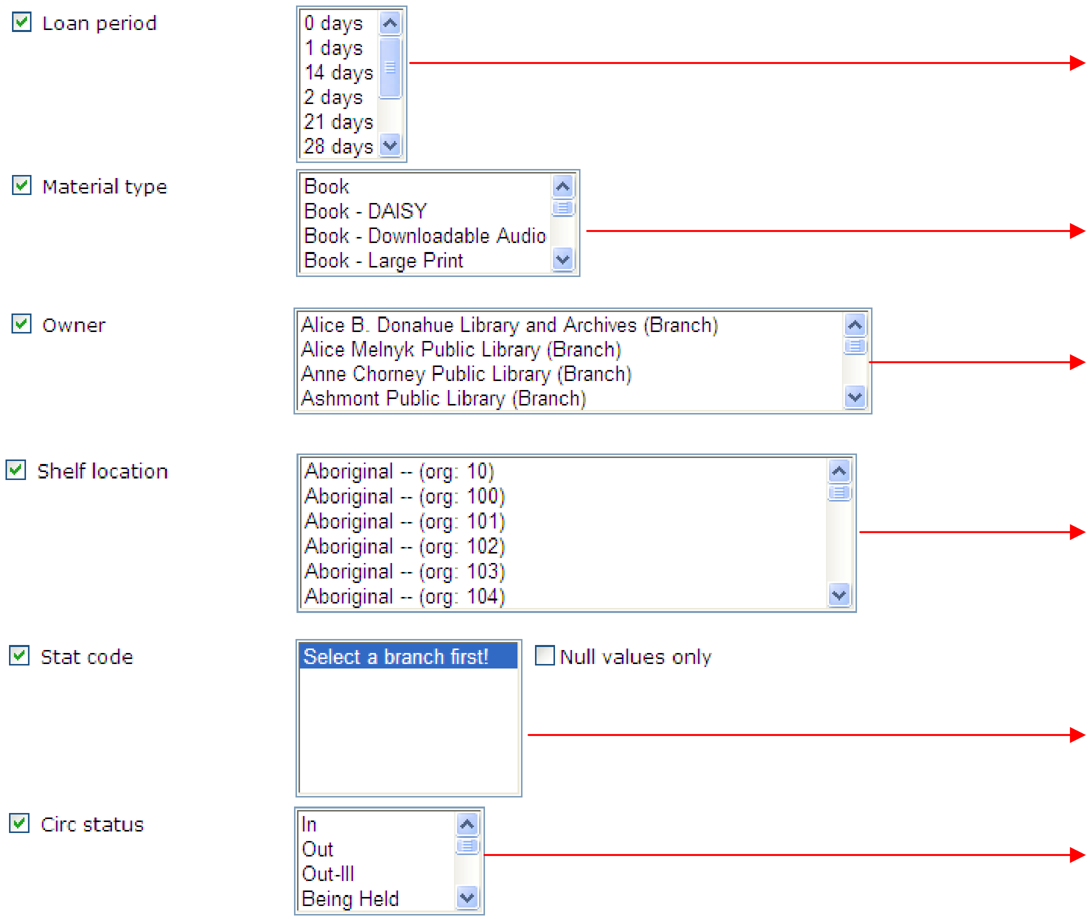
Limit output to records created or modified by selected user(s).

Limit output to items donated by the selected donor.

Limit output to item records with selected fine code(s).

Limit output to the selected home branch or branches.

Limit output to records with selected history action.



Limit output to item records with selected fine code(s).

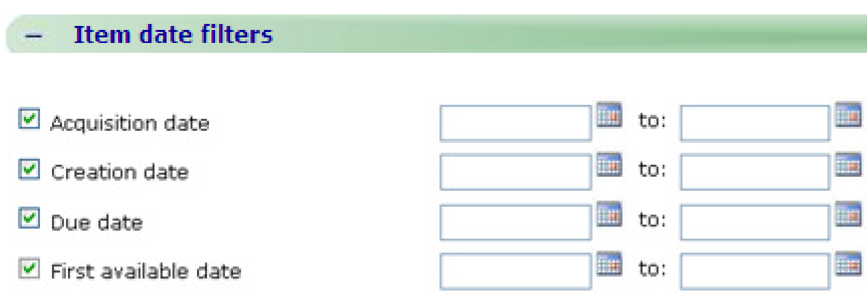
Limit output to specific types of material.

Limit to item records owned by a specific branch or branches.

Limit to items in a specific shelf location. There are many org locations listed for one shelf location. Select all of the org locations for the shelf location you want by using the Ctrl+Shift and ensure your branch is selected in Assigned Branch.

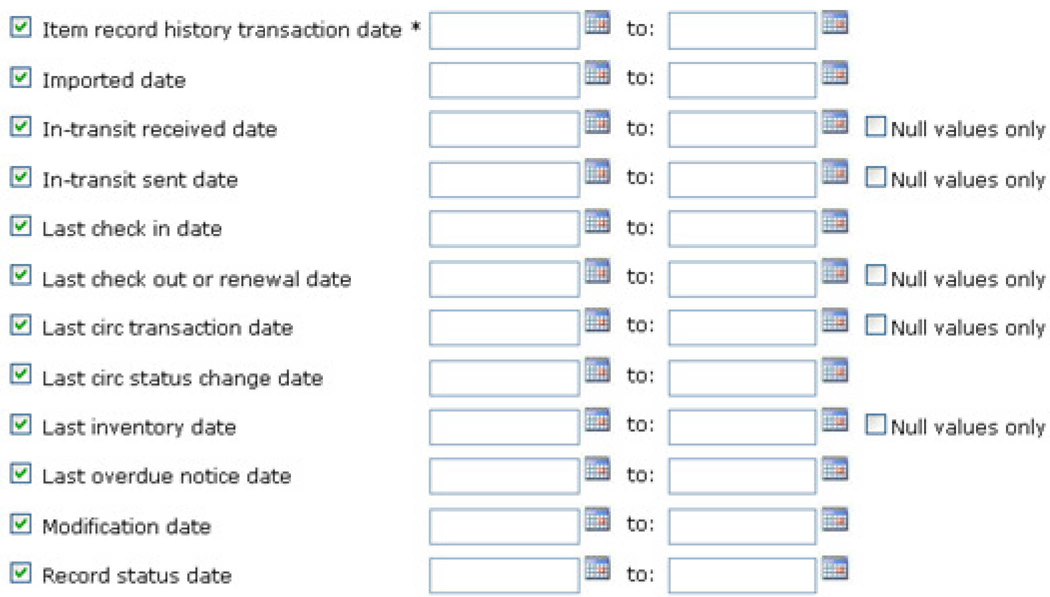
Limit to item records with selected statistical codes. A branch must be selected first.

Limit output to items with the specific circulation status.



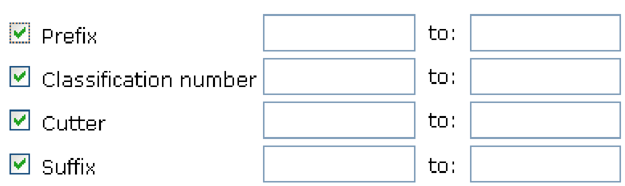
Enter a time range using the calendars to limit output to records with specific date ranges. When:

- item was acquired
- item record was created
- item is due
- item becomes available



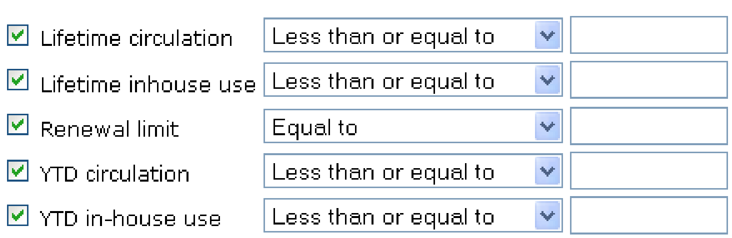
- item history transactions were made
- item was imported into Polaris
- item was in-transit and was received within specified time period
- item was sent from another library
- item was last checked in
- item was last checked out or renewed
- item was last circulated
- circulation status of item changed
- item was last inventoried
- an overdue notice about item was sent
- item record was last modified
- item record status changed

– Item call number filters

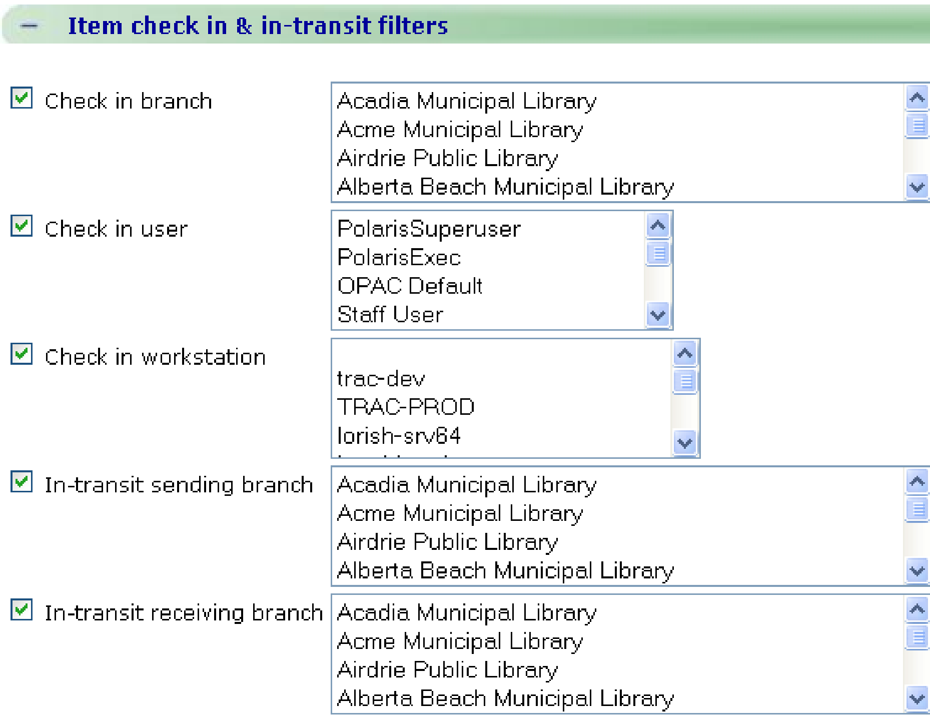


Type **from** and **to** ranges for any of these fields to limit to items within those ranges.

– Item circulation filters



Select **Less than or equal to**, **Equal to**, or **Greater than or equal to** and type a number to limit to items with specific circulation statistics.



Limit output to item's check in status by:

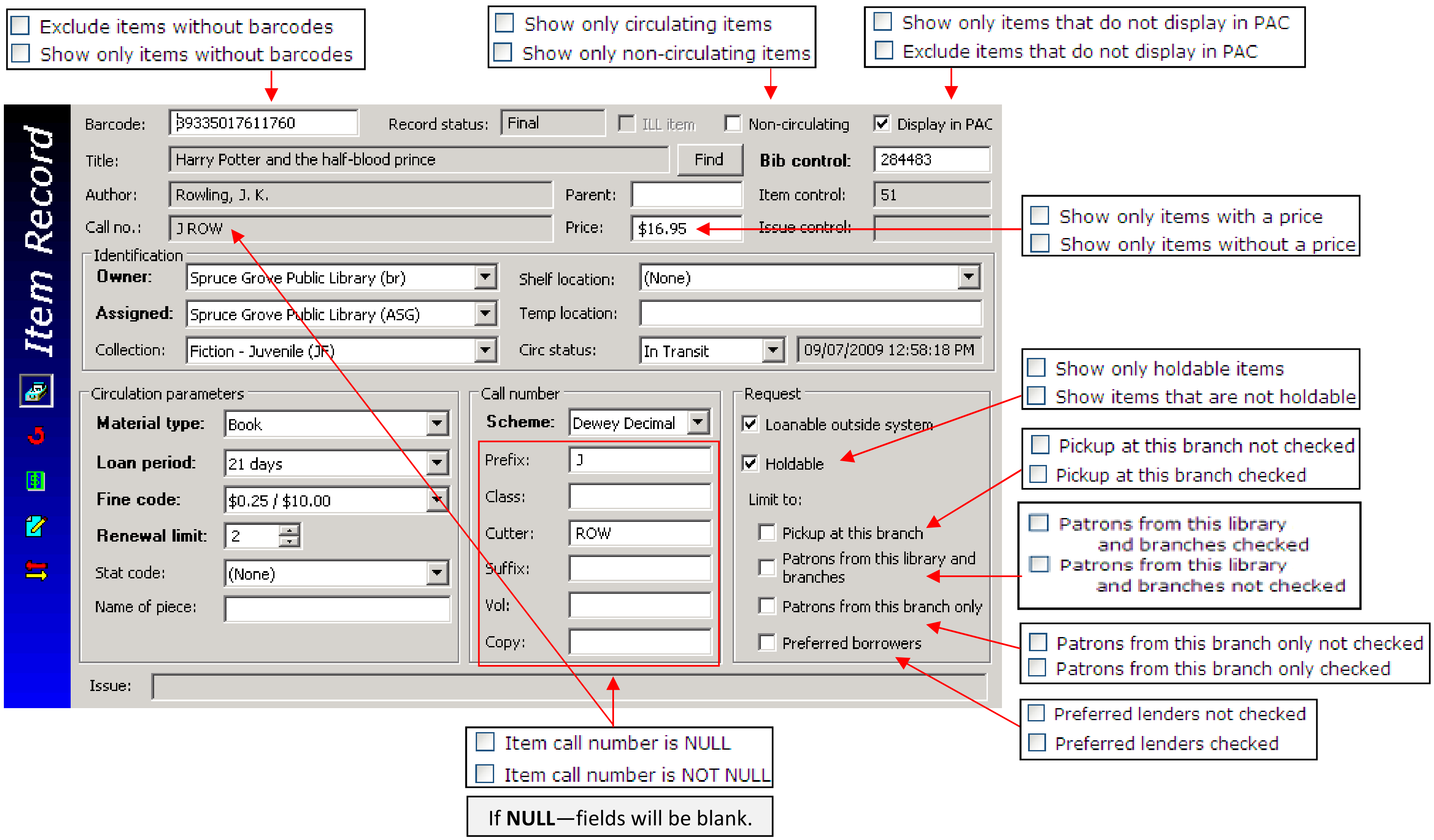
- selected branch(es) where an item was checked in
- selected staff member(s) who checked item in
- selected workstation where item was checked in

Limit output to item's in-transit status by:

- selected branch(es) that sent item in
- selected branch(es) from where item was received after being in-transit.

– Item checkbox filters

These filters refer to specific check boxes on the Item Record workform.
See where the information from the filters is derived from below.



− Item record ID filters

☐ Extract records from item record ID [1] To [3106935]

Filter to items within a specific ID range.

− Bibliographic record filters

☑ Bib record language

- Abkhaz - abk
- Achinese - ace
- Acoli - ach
- Adangme - ada

Limit to items linked to bib records with the selected language(s).

☑ MARC literary form

- 0 - Not fiction (not further specified)
- 1 - Fiction (not further specified)
- c - Comic strips
- d - Dramas

Limit to items linked to bib records with selected form(s).

☑ MARC target audience

- \- Unknown or not specified
- a - Preschool
- b - Primary
- c - Pre-adolescent

Limit to items linked to bib records with selected target audience(s).

See also: Bibliographic record filters, page 12.

+ Patron general filters
+ Patron date filters
+ Patron miscellaneous filters
+ Patron ID filters

See Patron filters, pages 2-5.

Statistical Reports

Features in Statistical reports sub-tabs appear similar in the various tabs. See related tabs for explanation of the filters.

Running a report may slow your system's performance so it is recommended to leave the **Run report now** check box unchecked.

☐ Run report **now** | Execution timeout (in seconds) 300

Statistical Reports

Statistical categories: Check in — Available subcategories: Activity summary

Selecting a statistical category will determine the available subcategories.

Report type: General Summary — Detail level: Not applicable for this report type

The selected report type determines the detail level.

Report focus:

◉ Run report by transacting organization only ◯ Include transacting user detail ◯ Include transacting workstation detail

Does not include details about the user or workstation.

Transacting branch

- Acadia Municipal Library
- Acme Municipal Library
- Airdrie Public Library
- Alberta Beach Municipal Library
- Alder Flats Public Library
- Alice B. Donahue Library and Archives

◉ Include branch name
◯ Include branch abbreviation
◯ Include branch ID
◯ Combine branch totals

Select the branch where the action took place.

User

- aaatest
- AABMVolunteer
- AAFIchaffee
- AAFSrseely
- AAFVolunteer
- ABARRhthompson

Workstation

- 22040116aw07241
- 22040116aw10826
- 22050124TW10607
- 22060111Tw09280
- 22140101SW08969

Depending on he selected report focus, these boxes will be activated and you will be able to select specific users or workstations.

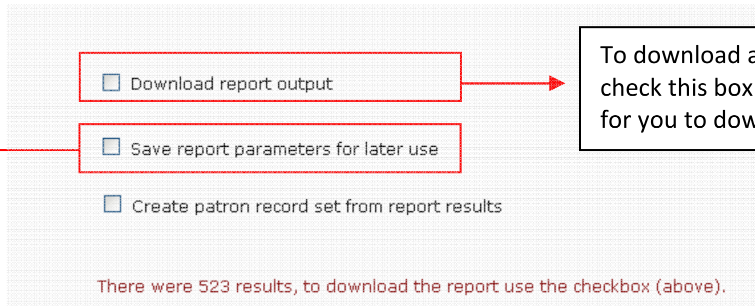
◉ Date range — Start date — End date

◯ Relative date — Days ago - to run date

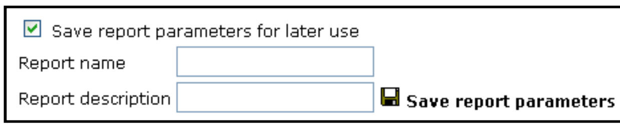
Specify a date range using the calendar icons, or choose period of time relative to the report run date.

Saved Reports

When you select the parameters and click "submit" to create a report, a new window will appear with the report data as well as the following options:



To download a file of the report, check this box and a file will appear for you to download.



Type in a name and description for the report and then click **Save report parameters**.

NOTE: When creating a report that includes dates, use the **relative dates filter** *not* the **dates filter**.

If you save a report to run later using specific dates set in the dates filter, it will run using *those specific dates*. Therefore, if you are looking to run a daily, weekly, or monthly report, set the parameters in the relatives dates filter.

When you click the Saved Reports tab, you will have to select the report type you saved. When it is selected, you will see the available reports to run. Select the applicable report by clicking the checkbox and then click "Run reports."

To edit the parameters of the report, click this button. However, you will **not** be able to change the filters, including the date.

Sample Patron List Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters	
Email list to send info to selected statistical class	Patron barcode Patron full name Patron statistical class description Email address Expiration date	Patron full name Expiration date	**Patron General Status** Branch Statistical Class **Patron Miscellaneous Filters** Email Address	 Select Branch Select Statistical Class Select Present
List of patrons with overdues	Item barcode Item status description MARC title MARC author Patron barcode Patron full name Patron lost item count	Patron full name	**Patron filters** Patron branch **Patron miscellaneous filters** Lost items	 Select Branch Greater than or equal to 1
Patrons with email notification but no email address	Patron barcode Patron full name Patron code description Patron alt email address	Patron full name	**Patron general filters** Branch **Patron miscellaneous** Notification option Email address	 Select Branch Email address Null
Patron Mailing List	Patron full name Patron street one Patron street two Patron city Patron state Patron postal code Patron alt email address	Patron full name Patron postal code	**General filter** Branch	 Select Branch
Expired Patron List with phone and email contact information	Patron full name Patron expiration date Patron phone 1 Patron email address	Patron full name Patron expiration date	**Patron general filters** Branch **Patron date filters** Expiration date	 Select Branch Select dates

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters	
List of Patrons by statistical class and birth date (to check for discrepancies)	Patron full name Patron barcode Patron birth date Patron statistical class description	Patron birth date Patron stat class description Patron full name	**Patron general filters** Branch Statistical class (optional)	 Select Branch Select Class
List of Patrons with highest lifetime circulation	Patron full name Patron barcode Patron lifetime circ count	Patron lifetime circ count Patron full name	**Patron general filters** Branch **Patron miscellaneous filters** Lifetime circ (count)	 Select Branch Select number

Sample Patron Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters	
Total # of patrons by branch	Branch name	Branch name	**Patron general filter** Branch	 Select branch
Total # of patrons added by your library in the last year	Branch name Code description	Code description	**Patron general filter** Branch **Date filter** Registration date	 Select branch Enter dates
Total # of patrons by statistical class	Patron statistical category	Patron statistical category	**Patron general filter** Branch	 Select branch
Patron YTD circulation by postal code	Patron postal code Patron city Sum patron YTD circ count	Patron postal code Patron city	**Patron general filter** Branch	 Select branch

Sample Patron Account List Reports

Patrons with charges for replacement costs	Acct reason (or fee reason) MARC author MARC title Acct trans. balance - outstanding chgs Acct transaction branch abbrev Patron barcode Patron full name	Acct trans balance-outstanding chgs Patron full name Acct trans. Balance-outstanding chgs	**Transaction Type** Charges **Patron account general filters** Reason Replacement cost **Patron account miscellaneous filters** Charges Greater than or equal to **Patron filters** Patron branch Select branch

Amount of outstanding charges for overdue items	Acct transacting branch name Patron code description Sum balance (outstanding balance only)	Acct transacting branch name Patron code description	**Outstanding balance options** Outstanding charges **Patron account general filters** Fee reason Overdue items

Sample Patron Account Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Amount of outstanding charges by branch	Acct transacting branch name Patron code description Sum balance	Acct transacting branch name	**Outstanding balance options** Outstanding charges
Number and amount of charges by stat class and branch	Patron statistical class description Patron Code description Acct transaction type Sum-balance (outstanding balance)	Patron statistical class description	**Outstanding balance options** Outstanding charges **Patron filters** Patron branch Select branch

Sample Holds List Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Hold request placed during the last month	Hold creation date Hold last status transition date MARC browse author MARC browse title Hold status description Item assigned branch abbrev	Hold creation date Hold status description MARC browse author MARC browse title	**Hold general filters** Pick up branch **Hold date filters** Hold creation date
List of items being held at other libraries	Item assigned branch name Item status description MARC browse author MARC browse title Hold activation date Hold till date Hold pickup branch name Hold status description	Hold pickup branch name MARC browse title	**Hold general filters** Hold status Held **Item filters** Item assigned branch Select your branch

Samples Holds Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Hold requests exceeding # of local copies available	MARC browse author MARC browse title	MARC browse title	**Optional** Number of requests greater than Number of holdable items less than Assigned branch Select branch **Hold general filter** Pickup branch Select branch **Hold date filters** Hold creation date Select dates
Top Requested Titles of the Last Month	MARC bibliographic record MARC browse author MARC browse title MARC primary type of material description	MARC browse author	**Optional** Select top # most requested files **Holds general filters** Pickup branch Select branch **Holds date filters** Hold creation date Select dates

Sample Items List Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters	
Claimed items within the last # of days	Item barcode Item circ status description MARC author MARC Title Patron full name for claimed item Patron barcode for claimed item	Patron full name for claimed item MARC Title MARC author	**Item General Filters** Assigned branch Circ status **Item Relative Date Filter** Last circ status change date between	 Select a branch Claims returned Claims never had # days ago and the report run date
Lost/Missing Items within the last # of days	Item barcode Item lost date Item circ status description MARC author MARC title Patron full name for lost item Patron barcode for lost item Item lifetime circ (*optional)*	Patron full name for lost item MARC title MARC author	**Item General Filters** Assigned branch Circ status **Item Date Filter** Last check out or renewal	 Select a branch Lost Select date
In House YTD Count by Collection	Item assigned collection name Sum item YTD inhouse use count	Item assigned collection name	**Item General Filters** Assigned branch Collection	 Select a branch Select a collection
Most popular items in a collection in the last year	Item assigned collection abbreviation Item call number MARC author MARC title Item last circ transaction date Item YTD circ count	Item assigned collection abbrev. Item last circ transaction date Item YTD circ count	**Item General Filters** Assigned branch Collection	 Select a branch Select a collection

List of French language items for a branch	Item assigned collection name Item barcode Item call number MARC title MARC author	Item assigned collection name Item call number MARC author	**Items general filter** Items assigned branch **Bibliographic record filters** Bib record language	 Select a branch French
Weeding list of Nonfiction Titles	Item call number MARC author MARC title Item barcode Item lifetime circulation	Item call number MARC author	**Item general filter** Assigned Branch Collection **Item date filters** Item last circ transaction date Item lifetime count	 Select a branch Nonfiction 1/1/1990 - 1/1/2006 (eg) less than or equal to 25
Item records without a price	Item barcode Item assigned collection abbrev. Item call number MARC author MARC title Item circ status description Item creation date	Item assigned collection abbrev. MARC title Item creation date	**Item general filter** Assigned branch Circulation status **Item checkbox filters** Show only items without a price	 Select a branch Checked
Held Items Checklist	Item Call Number MARC browse title Item barcode Patron full name Patron phone Patron email Hold Notification date Hold till date Hold expiration date		**Holds general filter** Pickup library Hold Status	 Select a branch Held

Item Records w/o barcodes	Item material type description Item call number MARC title MARC author (Item assigned collection abbreviation)		**Item general filter** Assigned Branch — Select branch (Collection) — (Select collection code) **Item checkbox filter** Show only titles w/o barcodes — checked
Item Records w/o call numbers	Item material type description Item call number MARC title MARC author (Item assigned collection abbreviation)		**Item general filter** Assigned Branch — Select branch (Collection) — (Select collection code) **Item checkbox filter** Item call number is NULL — checked
Items that do not show in PAC	Item barcode Item call number MARC author MARC title Item assigned collection abbreviation		**Item general filter** Assigned Branch — Select branch Record status — Final **Item checkbox filter** Show only items that do not display in PAC — checked
Check Items created or modified by a staff member	Item assigned collection abbreviation Item creation date Item barcode MARC title MARC author Item call number	Item assigned collection abbrev.	**Item general filter** Assigned branch — Select a branch Creator — Select an ID *Modifier* — *Select an ID*

Sample Items Count Reports

Report Description	Columns Selected for Output	Columns Selected for Sort	Filters
Count of what libraries your patrons are going to physically check out books	Patron Branch Name Item Check out Branch Name Item Check out branch abbreviation	Patron Branch Name	**Patron general filters** Branch Select a branch