

SimplyReports Report Templates

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Patron List Reports

Email List

Basic Report

This report generates a basic list of patron emails. You may enhance this list by adding additional parameters (columns for output) or filters, as illustrated below.

Columns selected for output	Columns selected for sort
Patron Barcode	Patron full name
Patron full name	
Email Address	
Filters	
Patron general filters	
Branch	Select your library
Patron miscellaneous filters	
Email address	Select "present"

Email List - All expired patrons

Add the following to the basic report:

Columns selected for output	Columns selected for sort
Patron expiration date	Patron expiration date
Filters	
Patron relative date filters	
Expiration date more than (X) before the report run date	Type "1" and select "Day"

Email List - Patrons who expired in certain time period

Add the following to the basic report:

Columns selected for output	Columns selected for sort
Patron expiration date	Patron expiration date
Filters	
Patron relative date filters	
Expiration date between (X) ago and the report run date	Enter number and select months or days from the list

Patron List Reports

Mailing List

Basic Report

This report creates a basic mailing list with patron address information. You can customize this report further by using additional filters.

Columns selected for output	Columns selected for sort
Patron full name	Patron full name
Patron street one	Patron postal code
Patron street two	
Patron city	
Patron state	
Patron postal code	
Filters	
Patron general filters	
Branch	Select your library

Mailing List - Specific statistical class (i.e. seniors)

Add the following parameters and filters to the basic report:

Columns selected for output	
Patron statistical class description	
Filters	
Patron general filters	
Statistical class	Select "senior"

Mailing List - Specific membership type (i.e. student or family)

Add the following parameters and filters to the basic report:

Columns selected for output	
Patron code description	
Filters	
Patron general filters	
Patron code	Select "student" or "family"

Patron List Reports

Phone List

Basic Report

This report creates a list of your patrons' phone numbers. Customize it by adding parameters and filters.

Columns selected for output	Columns selected for sort
Patron full name	Patron full name
Patron phone 1	Patron postal code
Filters	
Patron general filters	
Branch	Select your library

Phone List - Active patrons

Add the following filter to the basic report:

Filters	
Patron relative date filters	
Last activity date between (X) ago and the report run date	Type in number and select days or months

Phone List - Expired patrons

Add the following parameter and filter to the basic report:

Columns selected for output	Columns selected for sort
Patron expiration date	Patron expiration date
Filters	
Patron date filters	
Expiration date	Select dates

Patron List Reports

List of patrons with highest lifetime circulation

This will create a report of your patrons, including expired patrons, with the highest number of checkouts.

Columns selected for output	Columns selected for sort
Patron full name	Patron lifetime circ count
Patron barcode	Patron full name
Patron lifetime circ count	
Filters	
Patron general filters	
Branch	Select your library
Patron miscellaneous filters	
Lifetime circ (count)	Select number

List of patron barcodes and PINs

This will create a report of all your library's patrons and their PINs or passwords.

Columns selected for output	Columns selected for sort
Patron full name	Patron full name
Patron barcode	
Patron password	
Filters	
Patron general filters	
Branch	Select your library

Patron Count Reports

Number of Patrons

Basic Report

This creates a report of the number of your library's patrons, both active and inactive. You can narrow the focus by selecting additional filters and parameters.

Columns selected for output	
Branch name	
Filters	
Patron general filters	
Branch	Select your library

Number of Patrons - By patron code

Add the following parameter to the basic report:

Columns selected for output	Columns selected for sort
Patron code description	Patron code description

Number of Patrons - By statistical class

Add the following parameter to the basic report:

Columns selected for output	Columns selected for sort
Patron statistical class description	Patron statistical class description

Number of Patrons - Added in the last year

Add the following parameters and filters to the basic report:

Columns selected for output	
Patron code description	
Filters	
Patron date filter	
Registration date	Enter dates

Patron Statistical Reports

Remember to perform statistical reports after the library is closed to avoid unnecessary delays in Polaris.

Count - Hourly check outs by workstation

This report will give you an hour-by-hour breakdown of check-outs performed on each workstation. You may use this to aid in scheduling.

Statistical Reports	
Statistical Category	Check out
Available subcategories	Activity summary
Report type	Hourly
Detail level	Hour
Report focus	
Select Include transacting workstation detail	
Library quick pick	Select your region
Transacting branch	Select your library
Workstation	Select appropriate workstations <i>or</i> do not
Date range <i>or</i> Relative date	Enter time period

Count - Monthly check-outs by patron library

This report will show you how many materials were checked out by patrons from other libraries in a month.

Statistical Reports	
Statistical Category	Check out
Available subcategories	By patron branch
Report type	Monthly
Detail level	Month
Report focus	
Select Include transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range <i>or</i> Relative date	Enter time period

Patron Statistical Reports

Count - Items set to claimed lost by staff by year

This report will give you statistics of how many items are claimed lost in a year and which of your staff members performed such transactions.

Statistical Reports	
Statistical Category	Check out
Available subcategories	Activity summary
Report type	Yearly
Report focus	
Select Include transacting user detail	
Library quick pick	Select your region
Transacting branch	Select your library
Workstation	Select appropriate users <i>or</i> do not select any to show stats for all
Date range <i>or</i> Relative date	Enter time period

Count - Registrations created by staff members

This report will show you the number of registrations created by staff members.

Statistical Reports	
Statistical Category	Patron registration created
Available subcategories	Activity summary
Report type	General Summary
Detail level	Not applicable
Report focus	
Select Include transacting user detail	
Library quick pick	Select your region
Transacting branch	Select your library
Workstation	Select appropriate users <i>or</i> do not select any to show stats for all
Date range <i>or</i> Relative date	Enter time period

Patron Statistical Reports

Checkouts - By patron branch

See the number of checkouts performed at your library by patrons from other libraries.

Statistical Reports	
Statistical Category	Check out
Available subcategories	By patron branch
Report type	Daily
Detail level	Day
Report focus	
Select Run report by transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range <i>or</i> Relative date	Enter time period

Patron Statistical Reports

Charges - Replacement costs

This report lists patrons who have outstanding charges associated with replacement costs of materials.

Columns selected for output	Columns selected for sort
Patron barcode	Patron full name
Patron full name	MARC author
MARC title	
MARC author	
Acct trans. balance - outstanding chgs	
Transaction Type	
Select Charges	
Filters	
Patron account general filters	
Reason	Replacement cost
Patron filters	
Patron branch	Select your region and library

Charges - Patrons owing more than a certain amount of money

This report lists patrons who, for whatever reason, owe more than a specified amount of money.

Columns selected for output	Columns selected for sort
Patron barcode	Patron acct charges
Patron full name	
Patron acct charges	
Transaction Type	
Select Charges	
Filters	
Patron miscellaneous filters	
Charges (amount) greater than or equal to	Type in an amount

Patron Account List Reports

Patron Payments - Transactions of fines within time period

This report will list the patrons who made payments on their account during a certain period of time. Includes amount and reason of charge, as well as payment method and which workstation processed the transaction.

Columns selected for output		Columns selected for sort	
Acct transaction date		Patron acct charges	
Acct reason (or fee reason)			
Patron acct charges			
Acct payment method description			
Acct transaction amount - history items			
Acct transaction workstation display name			
Transaction Type			
Select Charges			
Filters			
Patron miscellaneous filters			
Charges (amount) greater than or equal to		Type in an amount	

Patron Account Count Reports

Outstanding Charges

Basic Report

This will show you the amount of outstanding charges owed to your library.

Columns selected for output	Columns selected for sort
Patron code description	Patron code description
Sum balance (outstanding balance only)	
Outstanding balance options	
Outstanding Charges	
Filters	
Patron account general filters	
Transacting branch	Select your region and library

Outstanding Charges - Overdue items

Add the following filter to the the basic report:

Filters	
Patron account general filters	
Fee reason code	Select Overdue Item

Waived Charges - By staff member during a specific time period

This will create a report to show how many fines were waived during a certain period of time.

Columns selected for output	Columns selected for sort
Acct transacting branch name	Patron code description
Acct transaction	
History options	
Outstanding Charges	
Filters	
Patron account general filters	
Transacting branch	Select your region and library

Patron Account Statistical Reports

Payments

This report will give statistics for the number of transactions during a particular time period, including the total from those transactions.

Statistical Reports	
Statistical Category	Patron accounting payment
Available subcategories	General summary
Report type	Select frequency
Detail level	Select detail level
Report focus	
Select Run report by transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range <i>or</i> Relative date	Enter time period

Charges

This report shows the number of charges, including totals, applied during a specific time period.

Statistical Reports	
Statistical Category	Patron accounting charge
Available subcategories	Reason code
Report type	Select frequency
Detail level	Select detail level
Report focus	
Select Run report by transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range <i>or</i> Relative date	Enter time period

Hold List Reports

Hold Requests - Placed in last month

Shows holds placed for items to be picked up at your library over the last month.

Columns selected for output	Columns selected for sort
Hold creation date	Hold creation date
Hold last status transition date	Hold status description
MARC browse author	MARC browse author
MARC browse title	MARC browse title
Hold status description	
Item assigned branch abbreviation	
Filters	
Hold general filters	
Pickup Branch	Select your region and library
Hold relative date filters	
Creation date between (X) ago	Type in 1 and select month

Held Items

Lists your library's items that are being held at other libraries.

Columns selected for output	Columns selected for sort
Item assigned branch name	Hold pickup branch name
Item status description	MARC browse title
MARC browse author	
MARC browse title	
Hold activation date	
Hold till date	
Hold pickup branch name	
Hold status description	
Filters	
Hold general filters	
Hold status	Select Held
Item filters	
Item assigned branch name	

Hold Count Reports

Hold - Your patrons picking up holds at other branches

This report will show how many holds are being requested by your patrons but picked up at other locations.

Columns selected for output	Columns selected for sort
Hold pick up Branch name	Hold pick up Branch name
Hold status description	Hold status description
Filters	
Patron general filters	
Patron branch	Select your region and your library

Hold - Requests exceeding number of local copies available

This report shows a list of items that have been requested by patrons using your library that exceed the number of copies you own.

Columns selected for output	Columns selected for sort
MARC browse author	MARC browse title
MARC browse title	
Optional:	
Number of requests greater than	Enter number
Number of holdable items less than	Enter number
Filters	
Hold general filters	
Pickup branch	Select branch
Holds relative date filters	
Creation date between (X) ago	Enter number and select days/months

Hold Count Reports

Hold - Top requested titles in the last month

This report shows to the top requested titles that your library users have requested.

Columns selected for output	Columns selected for sort
MARC browse author	MARC browse author
MARC browse title	MARC browse title
MARC bibliographic record	
MARC primary type of material description	
Optional:	
Select top # most requested titles	
Filters	
Hold general filters	
Pickup branch	Select branch
Holds relative date filters	
Creation date between (X) ago	Enter number and select days/months

Hold Statistical Reports

Hold Satisfied

This shows the number of holds picked up by patrons at your library.

Statistical Reports	
Statistical Category	Hold satisfied (item checked out to patron)
Available subcategories	Pickup location
Report type	Select frequency
Detail level	Select detail level
Report focus	
Select Run report by transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range <i>or</i> Relative date	Enter time period

Item List Reports

In house use YTD count by collection

This report will generate numbers so you can compare circulation statistics of the various collections in your library.

Columns selected for output	
Item assigned collection name	Item assigned collection name
Sum item YTD inhouse use count	
Filters	
Item general filter	
Assigned branch	Select your region and library
Collection	Select a collection <i>or</i> choose none to see

Lost item list

This will create a report listing all your library's patrons who have lost materials, including materials from other libraries.

Columns selected for output	Columns selected for sort
Patron barcode	Patron full name
Patron full name	MARC title
Patron lost item count	
Item barcode	
MARC title	
MARC author	
Item assigned branch name	
Item circ status description	
Filters	
Patron general filters	
Assigned branch	Select your region and library
Patron miscellaneous filters	
Lost items	Greater than or equal to (1)

Item List Reports

Lost/Missing items list - Status set over a specific time period

This will create a report listing all the items that were set to lost or missing over a certain period of time.

Columns selected for output	Columns selected for sort
Item barcode	MARC title
MARC title	
MARC author	
Item circ status description	
Item modifier name (<i>optional</i>)	
Filters	
Item general filters	
Assigned branch	Select your region and library
Collection (<i>optional</i>)	Select collection
Circ status	Select "lost" and "missing" (hold down
Patron miscellaneous filters	
Lost items	Greater than or equal to (1)

Most popular items in a collection in the last year

Columns selected for output	Columns selected for sort
Item assigned collection abbreviation	Item assigned collection abbreviation
MARC title	Item last circ transaction date
MARC author	Last YTD circ count
Item call number	
Item last circ transaction date	
Item YTD circ count	
Filters	
Item general filters	
Assigned branch	Select your region and library
Collection (<i>optional</i>)	Select collection
Lost items	Greater than or equal to (1)

Item List Reports

List of French language items belonging to your library

Columns selected for output	Columns selected for sort
Item assigned collection abbreviation	Item assigned collection abbreviation
Item barcode	Item call number
Item call number	MARC author
MARC title	
MARC author	
Filters	
Item general filters	
Assigned branch	Select your region and library
Bibliographic record filters	
Bib record language	French

Items without a price

Displays your library's items that do not have a price listed in the item record.

Columns selected for output	Columns selected for sort
Item assigned collection abbreviation	Item assigned collection abbreviation
Item barcode	MARC title
Item call number	Item creation date
MARC title	
MARC author	
Item circ status description	
Item creation date	
Filters	
Item general filters	
Assigned branch	Select your region and library
Item checkbox filters	
Show only items without a price	Checked

Item List Reports

Your library's items with a status of in transit

This report will show items that are in transit, including the date they were put in transit.

Columns selected for output	Columns selected for sort
Item barcode	MARC title
MARC title	
MARC author	
Item last in transit date	
Filters	
Item general filters	
Assigned branch	Select your region and library
Circ status	In Transit

Weeding List - Nonfiction titles

Customize this report by adding more parameters for more information, or more filters to further refine data retrieved.

Columns selected for output	Columns selected for sort
Item call number	Item call number
MARC author	MARC author
MARC title	
MARC pub year	
Item barcode	
Item last circ transaction date	
Item lifetime circulation	
Filters	
Item general filters	
Assigned branch	Select your region and library
Collection	Nonfiction
Item date filters	
Item last check out or renewal date	1/1/1990 - 1/1/2007 (example)
Item lifetime circulation	less than or equal to (X)
Item call number filters <i>(optional)</i>	
Classification number	Enter range

Item Count Reports

Collection Value

The following creates a report that totals the dollar amount and count of all items in a certain collection.

Columns selected for output	Columns selected for sort
Item assigned collection name	Item assigned collection name
Sum item price	
Filters	
Item general filters	
Assigned branch	Select your region and library

Lost items value

This creates a report that counts all the items and totals the dollar amount for items that have been set to lost.

Columns selected for output	Columns selected for sort
Item assigned collection name	Item assigned collection name
Sum item price	
Filters	
Item general filters	
Assigned branch	Select your region and library
Circ status	Select Lost

Age of collection

This creates a report that shows how many items in your library have been published after 1990 with the number of items by publication year. You can change the year for a broader range.

Columns selected for output	Columns selected for sort
Item assigned collection name	Item assigned collection name
MARC pub year	MARC pub year
Filters	
Item general filters	
Assigned branch	Select your region and library
Bibliographic record filter	
Marc Publication	Start value 1990, End value 2010

Item Count Reports

Items owned by collection

Basic report

This report shows you the number of items you have per assigned collection code.

Columns selected for output	Columns selected for sort
Item assigned collection name	Item assigned collection name
Item circ status description	Item circ status description
Filters	
Item general filters	
Assigned branch	Select your region and library
Collection	Select collection

Items owned by collection - Added within last year

Add the following filter to basic report:

Filters	
Item date filters	
Creation date	Select dates

Item Statistical Reports

Circulation by item statistical code for the year

Statistical Reports	
Statistical Category	Check out
Available subcategories	Item statistical code
Report type	General summary
Report focus	
Select Run report by transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range	Select dates

Circulation by material type for the year

Statistical Reports	
Statistical Category	Check out
Available subcategories	Item Material type
Report type	General summary
Report focus	
Select Run report by transacting organization only	
Library quick pick	Select your region
Transacting branch	Select your library
Date range	Select dates

Item Statistical Reports

Hourly circulation by workstation

Statistical Reports	
Statistical Category	Check out
Available subcategories	Activity summary
Report type	Hourly
Report focus	
Include transacting workstation detail	
Library quick pick	Select your region
Transacting branch	Select your library
Date range	Select dates

Item records modified by staff member

Totals the number of item records modified by staff over a period of time.

Statistical Reports	
Statistical Category	Item record modified
Available subcategories	Activity summary
Report type	General summary
Report focus	
Select Include transacting user detail	
Library quick pick	Select your region
Transacting branch	Select your library
Date range	Select dates