



Yes, Simply Report can help!

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Can Simply Reports Help About:

1. An item's material type does not match collection code, where is it?
2. Are there patrons that are over 85 years old and have at least one long term overdue?
3. Are there patrons that are over 85 years old and are inactive for more than 3 years?
4. Are there any patrons that are over 18 years old but the patron code is still juvenile?
5. I wanted to know a specific collection's YTD circulation count.
6. Can I have a list about my collections that each item's circulation count of lifetime are 5 or less?
7. How may I know that some of the items on a specific shelf are not inventoried?
8. How many bibliographic records that have the coding of pre-publication?
9. How many bibliographic records that the target audience is not specified?
10. May I know how many items my department ordered, and how much money has been encumbered? During any period of a year?
11. May I know how many items we ordered are received, paid, or cancelled? During any period of a year?

And more...

Item Search

Item Search:

An item's material type does not match collection code, where is it?

Collection Material Type Analysis

Collection	Material Type	Item Count
TV Series 4K Blu-Ray	<All>	8
TV Series Blu-Ray	Blu-Ray	356
TV Series Blu-Ray	Blu-Ray Nonfiction	1
TV Series Blu-Ray	<All>	357
TV Series Blu-Ray Nonfiction	Blu-Ray Nonfiction	4
TV Series Blu-Ray Nonfiction	<All>	4
TV Series DVD	DVD	5384
TV Series DVD	DVD Nonfiction	6
TV Series DVD	<All>	5390
TV Series DVD Nonfiction	DVD	1
TV Series DVD Nonfiction	DVD Nonfiction	234
TV Series DVD Nonfiction	<All>	235
Video Game	Video Game	655
Video Game	<All>	655
Videogame Console Equipment	Smart Home	4

The screenshot shows a search filter interface with several dropdown menus. Red arrows highlight the following items:

- Collection:** TV Series Blu-Ray Nonfiction
- Material type:** DVD Nonfiction
- Material type:** DVD

Item Search

An item's material type does not match collection code, where is it?

- Result:
- You can copy each barcode and update the codes through the client;
- You can also save them to a record set;
- Or you can download the excel list and handle these items later.

Close window

Download report output

Save report parameters for later use

Create item record set from report results

There were 1 results, to download the report use the checkbox (above).

ItemBarcode	CallNumber	ShelfLocation	Description	BrowseTitle
31315009291316	BLU-RAY TV SERIES PLANET	TV Series		Planet Earth III

Close window

Download report output

Save report parameters for later use

Create item record set from report results

There were 6 results, to download the report use the checkbox (above).

ItemBarcode	CallNumber	ShelfLocation	Description	BrowseTitle
31315007932739	DVD TV SERIES AMERICA'S	TV Series		America's funniest home videos. Motherhood madness
31315008744125	DVD FROM Season 1	TV Series		From scratch. Season 1.
31315009214870	DVD TV SERIES SECRET SEASONS 1 AND 2	TV Series		The secret of Skinwalker Ranch. Seasons 1 & 2
31315009231254	DVD TV SERIES FROZEN	TV Series		Frozen planet. Complete series collection
31315009231775	DVD TV SERIES FROZEN 2	TV Series		Frozen planet II.
31315009296620	DVD TV SERIES ILLUMINATI Season 1	TV Series		Iluminati. Season 1.

Close window

Download report output

Save report parameters for later use

Create item record set from report results

There were 1 results, to download the report use the checkbox (above).

ItemBarcode	CallNumber	ShelfLocation	Description	BrowseTitle
31315009288361	DVD TV SERIES HOPE New TV Series			Hope in the water

Patron Search

1st Patron Search

- Are There Patrons That Are Over 85 Years Old And Have At Least One Long Term Overdue (Lost)?
- Next:

The screenshot shows the 'SimplyReports' interface for a 'Patron account list reports' search. The report is configured with the following settings:

- Report output columns:** Patron street one, Patron street three, Patron street two, Patron ytd circ count, Patron zip + 4, Use patron legal name on print/ph
- Columns selected for output:** Patron code, Patron birth date, Patron phone 1, Item barcode, Item call number, MARC title
- Columns selected for sort:** Patron barcode
- Output options:** Include header rows, Text file, Excel file, Delimiter type: Comma & Quotes
- Transaction type:** Charges, Credits, Deposits, Transaction summary
- Filters:**
 - Patron account general filters
 - Patron account miscellaneous filters
 - Transaction date filters
 - Item filters
 - Patron filters
 - Patron date filters
 - Registration date: Not present
 - Last activity date: Not present
 - Expiration date: Not present
 - Birth date: 1/1/1900 to 10/31/19
 - Patron relative date filters
 - Patron miscellaneous filters
 - Claims: Greater than or equal to
 - Lost items: Greater than or equal to 1
 - YTD circ: Greater than or equal to
 - Lifetime circ: Greater than or equal to

Maximum rows to return: 90

2nd Patron Search

- Are There Patrons That Are Over 85 Years Old And Are Inactive For More Than 3 Years?
- Next:

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

Patron list reports Patron count reports Patron statistical reports

Maximum rows

Report output columns

- Patron tree text message
- Patron free text message date
- Patron gender
- Patron ID
- Patron language
- Patron last activity date
- Patron last name
- Patron last first name

Columns selected for output

- Patron barcode
- Patron birth date
- Patron code
- Patron telephone 1
- Patron full name

Columns selected for sort

- Patron birth date

Registration date Update date Last activity date Expiration date Birth date

10/1/190! 10/24/19! Not present Not present Not present

Include header rows

Patron relative dates filters

- Registration date between Days ago and the report run date
- Update date between Days ago and the report run date
- Last activity date between Days ago and the report run date
- Expiration date between Days ago and the report run date
- Expiration date more than Days before the report run date
- Last activity date more than 3 Years before the report run date
- Registration date more than Days before the report run date

Patron miscellaneous filters

2nd Patron Search

- Are There Patrons That Are Over 85 Years Old And Are Inactive For More Than 3 Years?
- Result:

Download report output

Save report parameters for later use

Create patron record set from report results

There were 372 results, to download the report use the checkbox (above).

PatronBarcode	Birthdate	PatronCodeDescr	Telephone1	PatronFullName
213150	1939 12:00:00 AM	Adult - OPPL	708	FLAHERTY
213150	1939 12:00:00 AM	Adult - OPPL	708	WEST
213150	1939 12:00:00 AM	Adult - OPPL	708	LEE, JAMES
213150	1939 12:00:00 AM	Adult - OPPL	708	CHUNG
213150	1939 12:00:00 AM	Adult - OPPL	708	PAVELL
213150	1939 12:00:00 AM	Adult - OPPL	708	RIORDAN
228890	1939 12:00:00 AM	Adult - Reciprocal Borrower	708	BRAND
261090	1939 12:00:00 AM	Adult - Reciprocal Borrower	847	LOFFRE
260890	1939 12:00:00 AM	Adult - Reciprocal Borrower	708	WHITE
228890	1939 12:00:00 AM	Adult - Reciprocal Borrower	708	HOFFMAN
213150	1939 12:00:00 AM	Adult - OPPL	708	MCMANUS
213150	1939 12:00:00 AM	Adult - OPPL	708	TAUS, VICTOR
213150	1939 12:00:00 AM	Adult - OPPL	708	SKREZ
213150	1939 12:00:00 AM	Adult - OPPL	708	WHITMAN
213150	1939 12:00:00 AM	Adult - OPPL	708	MANEL
228890	1939 12:00:00 AM	Adult - Reciprocal Borrower	708	PAWLICKI, M
213150	1939 12:00:00 AM	Adult - OPPL	708	LISIECH
213150	1939 12:00:00 AM	Adult - OPPL	708	BISTYAN
213150	1939 12:00:00 AM	Adult - OPPL	708	GAUSS, ELIZABETH
213150	1939 12:00:00 AM	Adult - OPPL	708	GARCIA
213150	1939 12:00:00 AM	Adult - OPPL	708	MESTAN
213150	1939 12:00:00 AM	Adult - OPPL	708	VOULGARIS
213150	1939 12:00:00 AM	Adult - OPPL	708	LESAK, J
213150	1939 12:00:00 AM	Adult - OPPL	708	PAPP, F
213150	1939 12:00:00 AM	Adult - OPPL	708	KNAPP, J
213150	1939 12:00:00 AM	Adult - OPPL	708	YOUDEL, REVE

3rd Patron Search

- Are there any patrons that are over 18 years old, but their patron code is still juvenile?
- Next:

Patron code: Juvenile - OPPL
Juvenile - Reciprocal Borrower
Juvenile Non-Resident-OPPL
Outreach Patron

Statistical class: Select a branch first! Not present

Language: Chinese

Resource Group:

Vendor Account: 3M Cloud
OverDrive Inc. (integrated)

Patron date filters

Registration date Not present

Update date Not present

Last activity date Not present

Expiration date Not present

Birth date 10/1/198: 10/14/20: Not present

+ Patron relative dates filters

+ Patron miscellaneous filters

+ Patron block and note filters

+ Patron user defined fields filters

+ Patron ID filters

Submit

Report output columns

Patron free text block
Patron free text block date
Patron free text message
Patron free text message date
Patron gender
Patron ID
Patron language

Columns selected for output: Patron birth date, Patron barcode, Patron code, Patron full name

Columns selected for sort: Patron birth date

Include header rows
 Text file
 Excel file
Delimiter type: Comma & Quotes

Submit

Patron general filters

Patron record set

3rd Patron Search

- Are there any patrons that are over 18 years old, but their patron code is still juvenile?
- Result:

If the number is not zero, it means these patron's p-codes need to be manually changed from juvenile as adult. Or contact Polaris support team to offer a SQL work for one time setup.

- Download report output
- Save report parameters for later use
- Create patron record set from report results

There were 0 results, to download the report use the checkbox (above).

Circulation Number Search

IUG 2025

1st Collection Report regarding Hotspot's Circulation Count

- By a calendar year, I wonder if there are some specific patrons that checked out these specific items more often than others.
- Next:

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

- Report output columns:** Patron city, Patron claim count, Patron email address, Patron expiration date, Patron first name, Patron ID, Patron last activity date.
- Columns selected for output:** Acct transaction date, Item barcode, Item call number, Patron barcode, Patron full name, Patron code.
- Columns selected for sort:** Patron barcode.
- Options:** Include header rows, Text file, Excel file. Delimiter type: Comma & Quotes.
- Transaction type (select at least one):** Charges, Credits, Deposits, Transaction summary.

A 'Submit' button is located at the bottom right of the form.

1st Collection Report regarding Hotspot's Circulation Count

- By a calendar year, I wonder if there are some specific patrons that checked out these specific items more often than others.

Material type

- E-Equipment
- eMagazine/eJournal
- Equipment
- Hotspot

- Next:

Transaction date filters

Transaction date

Transaction date between Days ago and the report run date

Patron miscellaneous filters

Claims

Lost items

YTD circ

...

1st Collection Report regarding Hotspot's Circulation Count

- By a calendar year, I wonder if there are some specific patrons that checked out these specific items more often than others.
- Result:

Transaction Date (check in/out)	Item Barcode	Call Number	Patron Barcode	Patron Full Name	Patron Code	Item Status
01/05/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	AEL Adult - OPPL	Checked Out
01/05/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	AEL Adult - OPPL	Checked Out
01/05/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	AEL Adult - OPPL	Checked Out
02/29/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	AEL Adult - OPPL	Checked Out
03/27/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	AEL Adult - OPPL	Checked Out
10/16/24	31315006951243	IT KIT T9 Franklin Hotspot c.4	21315006951243	[REDACTED]	AEL Adult - OPPL	Checked Out
01/05/24	31315006951276	IT KIT T9 Franklin Hotspot c.9	21315006951276	[REDACTED]	AEL Adult - OPPL	Lost
01/05/24	31315006951276	IT KIT T9 Franklin Hotspot c.9	21315006951276	[REDACTED]	AEL Adult - OPPL	Lost
03/27/24	31315006951375	IT KIT T9 Franklin Hotspot c.11	21315006951375	[REDACTED]	AEL Adult - OPPL	On Hold
08/09/24	31315006951722	IT KIT LINKZONE 2 c.2	21315006951722	[REDACTED]	AEL Adult - OPPL	Checked Out
10/16/24	31315006951722	IT KIT LINKZONE 2 c.2	21315006951722	[REDACTED]	AEL Adult - OPPL	Checked Out
08/09/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	AEL Adult - OPPL	Checked Out
08/09/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	AEL Adult - OPPL	Checked Out
08/09/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	AEL Adult - OPPL	Checked Out
10/16/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	AEL Adult - OPPL	Checked Out
12/30/24	31315006951540	IT KIT LINKZONE 2 c.11	21315006951540	[REDACTED]	AEL Adult - OPPL	Checked Out
01/05/24	31315006951482	IT KIT LINKZONE 2 c.13	21315006951482	[REDACTED]	AEL Adult - OPPL	Checked Out
11/20/24	31315006951482	IT KIT LINKZONE 2 c.13	21315006951482	[REDACTED]	AEL Adult - OPPL	Checked Out
11/20/24	31315006951573	IT KIT LINKZONE 2 c.26	21315006951573	[REDACTED]	AEL Adult - OPPL	Checked Out
11/20/24	31315006951573	IT KIT LINKZONE 2 c.26	21315006951573	[REDACTED]	AEL Adult - OPPL	Checked Out
08/09/24	31315006951391	IT KIT LINKZONE 2 c.32	21315006951391	[REDACTED]	AEL Adult - OPPL	Checked Out
08/09/24	31315006951391	IT KIT LINKZONE 2 c.32	21315006951391	[REDACTED]	AEL Adult - OPPL	Checked Out
08/09/24	31315006951391	IT KIT LINKZONE 2 c.32	21315006951391	[REDACTED]	AEL Adult - OPPL	Checked Out
05/15/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	AEL Adult - OPPL	Checked Out
05/15/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	AEL Adult - OPPL	Checked Out
05/15/24	31315006951714	IT KIT LINKZONE 2 c.5	21315006951714	[REDACTED]	AEL Adult - OPPL	On Shelf
02/26/24	31315006951573	IT KIT LINKZONE 2 c.26	21315006951573	[REDACTED]	JUDIA Adult - OPPL	Checked Out
10/09/24	31315006951383	IT KIT T9 Franklin Hotspot c.10	21315006951383	[REDACTED]	JUDIA Adult - OPPL	Checked Out
11/24/24	31315006951482	IT KIT LINKZONE 2 c.13	21315006951482	[REDACTED]	MARY Adult - OPPL	Checked Out
11/19/24	31315006951383	IT KIT T9 Franklin Hotspot c.10	21315006951383	[REDACTED]	MON Adult - OPPL	Checked Out
07/28/24	31315006951433	IT KIT LINKZONE 2 c.9	21315006951433	[REDACTED]	ANNE Adult - OPPL	Checked Out
12/19/24	31315006951755	IT KIT LINKZONE 2 c.3	21315006951755	[REDACTED]	GREEN Adult - OPPL	Checked Out
10/31/24	31315006951490	IT KIT LINKZONE 2 c.14	21315006951490	[REDACTED]	GREEN Adult - OPPL	Checked Out
12/19/24	31315006951482	IT KIT LINKZONE 2 c.13	21315006951482	[REDACTED]	GREEN Adult - OPPL	Checked Out
06/27/24	31315006951573	IT KIT LINKZONE 2 c.26	21315006951573	[REDACTED]	REEN Adult - OPPL	Checked Out
09/11/24	31315006951680	IT KIT LINKZONE 2 c.19	21315006951680	[REDACTED]	REEN Adult - OPPL	Checked Out
10/31/24	31315006951680	IT KIT LINKZONE 2 c.19	21315006951680	[REDACTED]	REEN Adult - OPPL	Checked Out
10/31/24	31315006951680	IT KIT LINKZONE 2 c.19	21315006951680	[REDACTED]	REEN Adult - OPPL	Checked Out
05/06/24	31315006951532	IT KIT LINKZONE 2 c.18	21315006951532	[REDACTED]	REEN Adult - OPPL	Checked Out
10/31/24	31315006951268	IT KIT T9 Franklin Hotspot c.7	21315006951268	[REDACTED]	REEN Adult - OPPL	Checked Out
10/31/24	31315006951268	IT KIT T9 Franklin Hotspot c.7	21315006951268	[REDACTED]	REEN Adult - OPPL	Checked Out
07/17/24	31315006951243	IT KIT T9 Franklin Hotspot c.4	21315006951243	[REDACTED]	REEN Adult - OPPL	Checked Out
08/24/24	31315006951243	IT KIT T9 Franklin Hotspot c.4	21315006951243	[REDACTED]	REEN Adult - OPPL	Checked Out
12/19/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	REEN Adult - OPPL	Checked Out
05/13/24	31315006951326	IT KIT T9 Franklin Hotspot c.2	21315006951326	[REDACTED]	REEN Adult - OPPL	Checked Out
06/06/24	31315006951326	IT KIT T9 Franklin Hotspot c.2	21315006951326	[REDACTED]	REEN Adult - OPPL	Checked Out
12/19/24	31315006951508	IT KIT LINKZONE 2 c.23	21315006951508	[REDACTED]	REEN Adult - OPPL	Checked Out
06/28/24	31315006951540	IT KIT LINKZONE 2 c.11	21315006951540	[REDACTED]	AYLE Adult - OPPL	Checked Out
07/21/24	31315006951532	IT KIT LINKZONE 2 c.18	21315006951532	[REDACTED]	AYLE Adult - OPPL	Checked Out
07/21/24	31315006951722	IT KIT LINKZONE 2 c.2	21315006951722	[REDACTED]	AYLE Adult - OPPL	Checked Out
06/01/24	31315006951276	IT KIT T9 Franklin Hotspot c.9	21315006951276	[REDACTED]	TRIAL Adult - OPPL	Lost
08/25/24	31315006951276	IT KIT T9 Franklin Hotspot c.9	21315006951276	[REDACTED]	MAL Adult - OPPL	Lost
02/21/24	31315006951375	IT KIT T9 Franklin Hotspot c.11	21315006951375	[REDACTED]	MAL Adult - OPPL	On Hold
12/21/24	31315006951292	IT KIT T9 Franklin Hotspot	21315006951292	[REDACTED]	MAL Adult - OPPL	Checked Out
02/21/24	31315006951243	IT KIT T9 Franklin Hotspot c.4	21315006951243	[REDACTED]	MAL Adult - OPPL	Checked Out
08/25/24	31315006951664	IT KIT LINKZONE 2 c.22	21315006951664	[REDACTED]	MAL Adult - OPPL	On Hold
04/25/24	31315006951391	IT KIT LINKZONE 2 c.32	21315006951391	[REDACTED]	MAL Adult - OPPL	Checked Out
08/25/24	31315006951540	IT KIT LINKZONE 2 c.11	21315006951540	[REDACTED]	MAL Adult - OPPL	Checked Out
10/16/24	31315006951748	IT KIT LINKZONE 2 c.8	21315006951748	[REDACTED]	MAL Adult - OPPL	Checked Out
09/05/24	31315006951391	IT KIT LINKZONE 2 c.32	21315006951391	[REDACTED]	LECTOR Adult - OPPL	Checked Out
09/05/24	31315006951672	IT KIT LINKZONE 2 c.29	21315006951672	[REDACTED]	LECTOR Adult - OPPL	On Shelf

Date	Assigned Branch	Status	Action	Location
1/28/2025 12:05:52 PM	Orland Park Publi...	On Shelf -> Checked Out	Checked out	Orland P...
1/28/2025 12:04:58 PM	Orland Park Publi...	Checked Out -> On Shelf	Checked in	Orland P...
1/27/2025 8:01:29 AM	Orland Park Publi...	Checked Out	Reminder notice: Email	Orland P...
1/22/2025 10:29:59 AM	Orland Park Publi...	On Shelf -> Checked Out	Checked out	Orland P...
1/22/2025 10:28:55 AM	Orland Park Publi...	Checked Out -> On Shelf	Checked in	Orland P...
1/20/2025 8:01:27 AM	Orland Park Publi...	Checked Out	Reminder notice: Email	Orland P...
1/15/2025 10:58:28 AM	Orland Park Publi...	On Shelf -> Checked Out	Checked out	Orland P...
1/15/2025 10:55:47 AM	Orland Park Publi...	Checked Out -> On Shelf	Checked in	Orland P...
1/14/2025 8:01:47 AM	Orland Park Publi...	Checked Out	Reminder notice: Email	Orland P...
1/9/2025 1:05:48 PM	Orland Park Publi...	On Shelf -> Checked Out	Checked out	Orland P...
1/9/2025 1:05:28 PM	Orland Park Publi...	Checked Out -> On Shelf	Checked in	Orland P...
1/2/2025 11:22:28 AM	Orland Park Publi...	On Hold -> Checked Out	Checked out	Orland P...
1/2/2025 9:56:23 AM	Orland Park Publi...	On Hold	At Orland Park Public Library B...	Orland P...
1/2/2025 9:56:23 AM	Orland Park Publi...	On Shelf -> On Hold	Automatic status change from ...	Orland P...

2nd Collection Report regarding Total Circulation Count For Outreach

- Can I have a list about my collections that each item's circulation count of lifetime are 5 or less?
- Hint: Exclude newly published items.
- Next:

Collection

Creator

Modifier

OS Kit and more

OS Kit-Non Book

OS Large Type Fic/Regular Fic

OS Large Type NF/Regular NF

3MPapiUser (Deleted)

3MPapiUser (Deleted)

Not present

polaris SimplyReports

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

Item list reports Item count reports Item statistical reports

Report output columns

Columns selected for output

Columns selected for sort

Include header rows

Text file

Excel file

Delimiter type Comma & Quotes

Export Express:

MARC file

MARC file - custom

Other formats

Holdings type No holdings

Profile Polaris default - with holdings

Format Dublin core (XML)

Character encoding MARC-8

Submit

Item general filters

Item record set

Assigned branch:

Library quick pick

Branch

Orland Park Lib

Orland Park Public Library Branch

Outreach Branch

2nd Collection Report regarding Total Circulation Count For Outreach

- Can I have a list about my collections that each item's lifetime circulation count is 5 or less?
- Hint: Exclude newly published items.
- Next:

Item date filters

<input type="checkbox"/> PO release date				
<input type="checkbox"/> Creation date				
<input type="checkbox"/> Due date				
<input checked="" type="checkbox"/> First available date	10/1/1925		10/1/2021	
<input type="checkbox"/> Item record history transaction date *				
<input type="checkbox"/> Imported date				

Status date between Days ago and the report run date

+ Item relative date filters (prior to a specified date)

+ Item call number filters

+ Item block, note, and funding filters

- Item circulation filters

<input checked="" type="checkbox"/> Lifetime circulation	Less than or equal to	5
<input type="checkbox"/> Lifetime inhouse use	Less than or equal to	
<input type="checkbox"/> Renewal limit	Equal to	

2nd Collection Report regarding Total Circulation Count For Outreach

- Can I have a list about my collections that each item's lifetime circulation count is 5 or less?
- Hint: Exclude newly published items.
- Result:

Item checkbox filters

<input type="checkbox"/> Display in PAC checked	<input type="checkbox"/> Display in PAC unchecked
<input type="checkbox"/> Call number not present	<input type="checkbox"/> Call number present
<input type="checkbox"/> Holdable unchecked	<input type="checkbox"/> Holdable checked
<input type="checkbox"/> Electronic item checked	<input type="checkbox"/> Electronic item not checked
<input type="checkbox"/> Pickup at this branch not checked	<input type="checkbox"/> Pickup at this branch checked
<input type="checkbox"/> Patrons from this branch only not checked	<input type="checkbox"/> Patrons from this branch only checked
<input type="checkbox"/> Patrons from this library and branches not checked	<input type="checkbox"/> Patrons from this library and branches checked
<input type="checkbox"/> Days past first available not checked	<input type="checkbox"/> Days past first available checked
<input type="checkbox"/> Preferred borrowers not checked	<input type="checkbox"/> Preferred borrowers checked
<input checked="" type="checkbox"/> Non-circulating not checked	<input type="checkbox"/> Non-circulating checked
<input checked="" type="checkbox"/> Exclude ILL items	<input type="checkbox"/> Show only ILL items

Close window

- Download report output
- Save report parameters for later use
- Create item record set from report results

There were 1649 results, to download the report use the checkbox (above).

CollectionName	ItemBarcode	CallNumber	ItemStatusDescr	FirstAvailableDate	LastCircTransactionDate	ItemStatusDate	LastCheckOutRenewDate	MaterialTypeDescription	ShelfLocationDescription	PublicationYear	BrowseTitle	ItemLifetimeCircCount
OS Movie DVD	31315004158908	OS DVD SIXTEEN	On Shelf	7/19/2006 12:00:00 AM				DVD	Outreach Shelf	2006	16 blocks	5
OS AudioBook Fic	31315004939281	OS AUDIOBOOK-BO CD KINSELLA, SOPHIA	On Shelf	9/23/2010 12:00:00 AM				Audiobook CD	Outreach Shelf	2010	Mini-shopaholic : [a novel]	5
OS AudioBook Fic	31315004936907	OS AUDIOBOOK-BO CD WEINER, JENNIFER	On Shelf	8/19/2010 12:00:00 AM	9/1/2023 6:44:17 PM	9/1/2023 6:44:17 PM	8/29/2023 12:26:59 PM	Audiobook CD	Outreach Shelf	2010	Fly away home	5
OS AudioBook Fic	31315004013194	OS AUDIOBOOK-BO CD BERNHARDT, WILLIAM	On Shelf	10/7/2010 12:00:00 AM	4/9/2021 2:00:35 PM	4/9/2021 2:00:35 PM	3/18/2021 11:17:48 AM	Audiobook CD	Outreach Shelf	2010	Capitol betrayal : [a novel]	5
OS Movie DVD	31315004016262	OS DVD TWILIGHT	On Shelf	12/9/2010 12:00:00 AM	10/23/2019 1:16:57 PM	10/23/2019 1:16:57 PM	10/22/2019 2:12:40 PM	DVD	Outreach Shelf	2010	The twilight saga. New moon	5
OS AudioBook Fic	31315004018060	OS AUDIOBOOK-BO CD BRENNAN, ALLISON	On Shelf	1/6/2011 12:00:00 AM	10/10/2022 2:26:14 PM	10/10/2022 2:26:14 PM	10/10/2022 2:25:48 PM	Audiobook CD	Outreach Shelf	2010	Love me to death : [a novel of suspense]	5
OS AudioBook Fic	31315004926544	OS AUDIOBOOK-BO CD ...	On Shelf	4/17/2010 12:00:00 AM	8/22/2022 1:29:38 PM	8/22/2022 1:29:38 PM	8/8/2022 10:51:25 AM	Audiobook CD	Outreach Shelf	2010	Every last one	5

2nd Collection Report regarding Total Circulation Count For Outreach

- Can I have a list about my collections that each item's lifetime circulation count is 5 or less?
- Hint: Exclude newly published items.
- Result:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Item Lifetime Circ Count	Collection Name	Item Barcode	Call Number	Item Status	First Available Date	Last Circ Transaction Date	Last Check Out Renew Date	Material Type Description	Publication Year	Browse Title	Shelf Location Description	
179	5	OS Large Type Fic/R	31315008569696	OS LT PEARSE, SARAH	On Shelf	08/11/21	09/13/23	09/11/23	Book	2021	The sanatorium	Outreach Shelf	
180	5	OS Large Type Fic/R	31315008566189	OS LT JANCE, J. A.	On Shelf	07/24/21	10/27/21	10/27/21	Book	2021	Unfinished busine	Outreach Shelf	
181	5	OS Large Type NF/R	31315007364966	OS LT 610.922 CAM	On Shelf	06/24/21	09/28/23	11/17/21	Book	2021	Women in white d	Outreach Shelf	
182	5	OS AudioBook Fic	31315007935229	OS AUDIOBOOK-BO CD MA	On Shelf	08/05/21	04/14/24	02/26/24	Audiobook CD	2021	A country affair	Outreach Shelf	
183	5	OS Large Type Fic/R	31315008623055	OS LT HELLER, PETER	On Shelf	08/30/21	06/24/24	06/14/24	Book	2021	The guide : a nove	Outreach Shelf	
184	5	OS Large Type Fic/R	31315008622974	OS LT ABBOTT, MEGAN	On Shelf	08/30/21	10/13/22	10/11/22	Book	2021	The turnout : a no	Outreach Shelf	
185	5	OS Large Type Fic/R	31315008566668	OS LT PATTERSON, JAMES	On Shelf	07/26/21	08/09/23	08/01/23	Book	2021	21st birthday	Outreach Shelf	
186	5	OS Large Type Fic/R	31315008567567	OS LT CHRISTIE, AGATHA	On Shelf	07/29/21	05/20/24	04/23/24	Book	2011	And then there we	Outreach Shelf	
187	5	OS Large Type Fic/R	31315008621331	OS LT EVANOVICH, JANET	On Shelf	08/18/21	12/29/23	12/21/23	Book	2021	The bounty	Outreach Shelf	
188	5	OS Large Type Fic/R	31315008566361	OS LT WHITE, KATE	On Shelf	07/26/21	09/18/23	09/13/23	Book	2021	The fiancee : a no	Outreach Shelf	
189	5	OS Large Type Fic/R	31315008566403	OS LT HILDERBRAND, ELIN	On Shelf	07/26/21	05/12/22	04/20/22	Book	2021	Golden Girl : a no	Outreach Shelf	
190	5	OS Large Type Fic/R	31315008567021	OS LT ALCOTT, LOUISA MA	On Shelf	07/30/21	07/05/24	05/21/24	Book	2011	Little women	Outreach Shelf	
191	5	OS Large Type Fic/R	31315008567039	OS LT ANDREWS, MARY KA	On Shelf	07/30/21	04/13/22	12/07/21	Book	2021	The newcomer	Outreach Shelf	
192	5	OS Large Type Fic/R	31315008566593	OS LT GREEN, JOCELYN	On Shelf	07/26/21	11/09/21	11/01/21	Book	2021	Shadows of the W	Outreach Shelf	
193	5	OS Large Type Fic/R	31315008626421	OS LT SHIPMAN, VIOLA	On Shelf	09/20/21	04/08/24	03/11/24	Book	2021	The Clover Girls	Outreach Shelf	
194	5	OS Large Type Fic/R	31315008626488	OS LT RICE, LUANNE	On Shelf	09/20/21	11/07/23	10/23/23	Book	2021	The shadow box	Outreach Shelf	
195	5	OS AudioBook Fic	31315007938777	OS AUDIOBOOK-BO CD KEI	On Shelf	09/23/21	08/14/23	08/02/23	Audiobook CD	2021	The burning	Outreach Shelf	
196	5	OS AudioBook Fic	31315007936045	OS AUDIOBOOK-BO CD MI	Checked O	08/25/21	10/01/24	10/01/24	Audiobook CD	2021	Hidden	Outreach Shelf	
197	4	OS AudioBook Fic	31315007936011	OS AUDIOBOOK-BO CD ALI	On Shelf	08/25/21	01/14/22	12/13/21	Audiobook CD	2021	The beach house	Outreach Shelf	
198	4	OS Large Type NF/R	31315008623030	OS LT 973.7114 WIC	On Shelf	08/30/21	10/08/24	09/17/24	Book	2021	The agitators : thr	Outreach Shelf	
199	4	OS Large Type Fic/R	31315008621398	OS LT SALINGER, J. D.	On Shelf	08/19/21	12/12/23	11/29/23	Book	2019	The catcher in the	Outreach Shelf	
200	4	OS AudioBook Fic	31315007939155	OS AUDIOBOOK-BO CD SN	On Shelf	09/29/21	11/12/23	10/22/23	Audiobook CD	2021	The seeds of char	Outreach Shelf	
201	4	OS Movie DVD	31315007936979	OS DVD HOCUS	On Shelf	09/01/21	08/22/24	08/18/24	DVD	2018	Hocus Pocus	Outreach Shelf	
202	4	OS AudioBook Fic	31315007936102	OS AUDIOBOOK-BO CD CH	On Shelf	08/25/21	05/31/24	05/11/24	Audiobook CD	2017	Murder on the Or	Outreach Shelf	
203	4	OS AudioBook Fic	31315008369378	OS AUDIOBOOK-BO CD GA	On Shelf	08/25/21	01/14/22	12/13/21	Audiobook CD	2021	The bookseller's s	Outreach Shelf	

Inventory Search (SimplyReports Part)

Steps For Inventory Search:

1. Decide a group of collection for inventory, find and save the items into one record set through Cataloging client; write down the date range you work with this set in set's note field, if this collection needs multiple days/months;
2. Take these items off the shelf and inventory them all through the Circulation client;

Inventory Search

Tips For Inventory Search:

1. Some of the items may be on status of checkout, on hold, missing, repair, lost, in-transit, or wrongly shelved, etc. and they are skipped for inventory when you grab them and do inventory at your workplace. These items will be on your inventory list as NOT inventoried. You will get this list through SimplyReports and you will handle them after the group of collection are complete.
2. If they are collected by collection code, At SimplyReports, you will use the same code. You can also collect items by material type, statistical code, shelf location code, etc. and at SimplyReports, use the same codes to continue the Inventory project.

Inventory Search : What Physical Items Are Inventoried Or Not Yet

1. Limit your categories to the specific collection code(s),
2. Enter last inventory dates;
3. Sort by Last Inventory dates.
4. *Next.*

The screenshot shows the Polaris SimplyReports interface. At the top, there is a navigation bar with the Polaris logo and the text 'SimplyReports'. Below this, there are several tabs: 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', 'Serials', 'Funds', 'Invoices', and 'Or'. Under the 'Items' tab, there are three sub-tabs: 'Item list reports', 'Item count reports', and 'Item statistical reports'.

The main configuration area is divided into three columns:

- Report output columns:** A list of columns including 'MARC sort ISBN', 'MARC sort ISSN', 'MARC sort OCLC number', 'MARC sort publisher number', 'MARC sort title', 'MARC sort UPC', and 'MARC UPC'.
- Columns selected for output:** A list of columns including 'Item assigned collection abbre', 'Item barcode', 'Item call number', 'Item last inventory date', 'Item material type', and 'MARC title'.
- Columns selected for sort:** A list of columns including 'Item last inventory date'.

Below these columns, there are several options:

- Include header rows
- Collection: A dropdown menu showing 'Juv Puzzles', 'Juv Reference', 'Juv Special Needs', and 'Juv Story Time'. To the right of this menu is an unchecked checkbox labeled 'Not present'.
- Last circ status change date: Two date input fields, both empty.
- Last inventory date: Two date input fields. The first contains '7/1/2023' and the second contains '8/31/2023'. To the right of these fields is an unchecked checkbox labeled 'Not present'.
- Last overdue notice date: Two date input fields, both empty.

Inventory Search : What Physical Items Are Inventoried Or Not Yet

1. The entire collections with this code (Special needs) are found;
2. Download the file as Excel format.
3. Items on the top of file are sort as inventoried with inventory dates;
4. Items on the bottom of file are not inventoried, without inventory date.

Close window

Download report output
 Save report parameters for later use
 Create item record set from report results

There were 115 results, to download the report use the checkbox (above).

CollectionAbbr	ItemBarcode	CallNumber	LastInventoryDate	MaterialTypeDescription
J Special	31315005152355	J PB 616.85 SKO	8/31/2023 4:20:10 PM	Book
J Special	31315006098441	J 362.1968 STE	8/31/2023 4:20:02 PM	Book
J Special	31315004831397	J 616.85 VAN	8/31/2023 4:19:56 PM	Book
J Special	31315008109931	J SCOTT, JORDAN	8/31/2023 3:15:33 PM	Book
J Special	31315007448983	J LESKO, EMMA	8/31/2023 3:15:31 PM	Book
J Special	31315007448975	J LESKO, EMMA	8/31/2023 3:15:29 PM	Book
J Special	31315007637700	J GUSTI	8/31/2023 3:15:27 PM	Book
J Special	31315007448991	J DRIVER, D.G.	8/31/2023 3:15:23 PM	Book
J Special	31315006425081	J BURNS, ELLEN FLANAGAN	8/31/2023 3:15:20 PM	Book
J Special	31315007448223	J CARMICHAEL, JODI	8/31/2023 3:15:17 PM	Book
J Special	31315003887002	E WOL	8/31/2023 3:15:14 PM	Book
J Special	31315005164988	E WOLOSOS, ELIZA	8/31/2023 3:15:09 PM	Book
J Special	31315005165167	E WILLIS, JEANNE	8/31/2023 3:15:02 PM	Book
J Special	31315003976300	J 618.928 DAY	8/31/2023 3:14:59 PM	Book
J Special	31315007075067	J 649.62 WHE	8/31/2023 3:14:40 PM	Book
J Special	31315005738336	E WEBB, JANE	8/31/2023 3:14:37 PM	Book
J Special	31315002290869	E THOMPSON, MARY	8/31/2023 3:14:34 PM	Book
J Special	31315003492738	E THO	8/31/2023 3:14:29 PM	Book
J Special	31315005167601	J THO	8/31/2023 3:14:23 PM	Book
J Special	31315005016196	E SUE	8/31/2023 3:14:19 PM	Book
J Special	31315005167551	E STU	8/31/2023 3:14:10 PM	Book
J Special	31315005167577	E SEN	8/31/2023 3:14:06 PM	Book
J Special	31315006912633	E RUDOLPH, SHAINA	8/31/2023 3:14:02 PM	Book
J Special	31315006867167	E SCHNEE, SILKE	8/31/2023 3:13:49 PM	Book
J Special	31315006786318	E RUDOLPH, SHAINA	8/31/2023 3:13:48 PM	Book
J Special	31315005936013	E RECOB, AMY	8/31/2023 3:13:45 PM	Book
J Special	31315005764084	E RECOB, AMY	8/31/2023 3:13:43 PM	Book

1	A	B	C	D	E	F	G	H	I	J	K	L	M
	CollectionAbbr	ItemBarcode	CallNumber	LastInventoryDate	MaterialTypeDescr	BrowseTitle							
2	J Special	31315005152355	J PB 616.85 SKO	08/31/23	Book	Fasten your seatbelt : a crash course on Down syndrome for brothers and sisters							
3	J Special	31315006098441	J 362.1968 STE	08/31/23	Book	Sensational journeys : 48 personal stories of sensory processing disorder							
4	J Special	31315004831397	J 616.85 VAN	08/31/23	Book	Understanding Sam and Asperger syndrome							
5	J Special	31315008109931	J SCOTT, JORDAN	08/31/23	Book	I talk like a river							
6	J Special	31315007448983	J LESKO, EMMA	08/31/23	Book	Super Lexi is not a fan of Christmas							
7	J Special	31315007448975	J LESKO, EMMA	08/31/23	Book	Super Lexi							
8	J Special	31315007637700	J GUSTI	08/31/23	Book	Malko and dad							
9	J Special	31315007448991	J DRIVER, D.G.	08/31/23	Book	No one needed to know							
10	J Special	31315006425081	J BURNS, ELLEN FLANAGA	08/31/23	Book	Ten turtles on Tuesday : a story for children about obsessive-compulsive disorder							
11	J Special	31315007448223	J CARMICHAEL, JODI	08/31/23	Book	Spaghetti is not a finger food : (and other life lessons)							
12	J Special	31315003887002	E WOL	08/31/23	Book	My friend Isabelle							
13	J Special	31315005164988	E WOLOSOS, ELIZA	08/31/23	Book	My friend Isabelle							
14	J Special	31315005165167	E WILLIS, JEANNE	08/31/23	Book	Susan laughs							
15	J Special	31315003976300	J 618.928 DAY	08/31/23	Book	The flight of the dove							
16	J Special	31315007075067	J 649.62 WHE	08/31/23	Book	Toilet training for individuals with autism or other developmental issues : a comprehensive guide for parents & teachers							
17	J Special	31315005738336	E WEBB, JANE	08/31/23	Book	My brother is artistic : "a brother's view of autism"							
18	J Special	31315002290869	E THOMPSON, MARY	08/31/23	Book	Andy and his yellow frisbee							
19	J Special	31315003492738	E THO	08/31/23	Book	Andy and his yellow frisbee							
20	J Special	31315005167601	J THO	08/31/23	Book	Andy and his yellow frisbee							

Inventory Search : What Physical Items Are Inventoried Or Not Yet

* If the collection is too large, you just want to find the items that are NOT inventoried, do these:

1. Limit your categories to the specific collection code(s),
2. Enter last inventory dates;
3. Sort by Last Inventory date and **check box of “Not present”**.
4. The result only shows the records that are NOT inventoried yet.
5. Save them to a record set, track and complete inventory later.

#IUG2025

Last circ status change date

Last inventory date

7/1/2023

8/31/2023

Not present

Close window

- Download report output
- Save report parameters for later use
- Create item record set from report results

There were 2 results, to download the report use the checkbox (above).

CollectionAbbr	ItemBarcode	CallNumber	LastInventoryDate	MaterialTypeDescription
J Special	31315001903793	J 790.196 MOR		Book
J Special	31315006873587	E MILLMAN, ISAAC		Book

IUG 2025

Title Search

IUG 2025

1st Title Search: How many bibliographic records that have the coding of pre-publication?

1. Create a Bibliographic record report
2. Title status needs to be Final
3. Create a bibliographic record set with these titles;
4. At Staff client, bulk change these titles.

Report output columns

- Vendor account description
- Vendor account name
- Vendor contract ID
- Vendor object identifier
- Vendor object link text
- Vendor object URL
- Bib imported date

Columns selected for output

- Bib creation date
- MARC title
- MARC author
- MARC bibliographic record ID
- MARC ISBN

Columns selected for sort

- MARC bibliographic record ID

Include header rows

Text file

Delimiter type: Comma & Quotes

Encoding level

MARC language

Record status

Encoding level options:

- Partial (preliminary) level
- 7 - Minimal level
- 8 - Prepublication level
- E - System-identified MARC error in batchloaded record
- I - Full-level input by OCLC participants
- L - Deleted record

MARC language options:

- Abkhaz - abk

Record status options:

- Final
- Provisional
- Deleted

1st Title Search: How many bibliographic records that have the coding of pre-publication?

Note:

1. You can bulk change the records with received items only.
2. And repeat this bulk change for these titles linked to the newly received items.

Download report output
 Save report parameters for later use
 Create bib record set from report results

There were 82 results, to download the report use the checkbox (above).

CreationDate	BrowseTitle	BrowseAuthor	BibliographicRecordID	ISBN
3/16/2024 10:43:05 AM	Precipice : a novel	Harris, Robert, 1957- author.	1088162	9780063248052
4/11/2024 4:04:05 PM	Influencer	Cesare, Adam, author.	1091237	
4/15/2024 9:57:04 AM	Big shark, Little Shark, and the Christmas tree	Membrino, Anna, author.	1091399	
4/15/2024 9:57:09 AM	I'll be waiting : a novel	Armstrong, Kelley, author.	1091407	9781250284211
4/15/2024 9:57:13 AM	The Great Hippopotamus Hotel	McCall Smith, Alexander, 1948- author.	1091414	
5/13/2024 3:45:43 PM	Bella ballerina	Draper, Sharon M. (Sharon Mills), author.	1094352	
5/24/2024 9:29:15 AM	Born of gilded mountains : a novel	Dykes, Amanda, author.	1096752	
5/24/2024 9:29:19 AM	Coal black lies	Sproles, Cindy, author.	1096758	
5/24/2024 9:29:30 AM	Jackpot summer	Friedland, Elyssa, author.	1096775	
5/24/2024 9:29:36 AM	Meet me at the Starlight : a novel	Hauck, Rachel, 1960- author.	1096784	9781420516906
5/24/2024 9:29:40 AM	Oye : a novel	Mogollon, Melissa, author.	1096791	
6/10/2024 10:41:07 AM	If only	Hjorth, Vigdis, author.	1099663	9781839768880
6/12/2024 3:24:07 PM	If I stopped haunting you	Wilkins, Colby, author.	1099885	
6/12/2024 3:24:11 PM	One on one : a novel	Harrow, Jamie, author.	1099890	9780593474822
6/13/2024 3:24:11 PM	The Oregon Trail	Johnstone, William W., author.	1100203	9781420515107
7/1/2024 2:35:08 PM	The Mesmerist : a novel	Woods, Caroline (Caroline Courtney), author.	1101838	9780385550161
7/8/2024 1:18:36 PM	The things we didn't know	Pérez, Elba Iris, author.	1103359	9781420515800
7/10/2024 3:20:09 PM	Defectors : the rise of the Latino far right	Ramos, Paola, 1987- author.	1105016	
7/10/2024 4:30:15 PM	I dreamed of falling : a novel	Dahl, Julia, 1977- author.	1105062	9781250865977
7/23/2024 1:45:04 PM	Scaffolding	Elkin, Lauren, author.	1105834	9780374615291
7/29/2024 4:25:22 PM	Karaoke queen	Lim, Dominic, 1974- author.	1106170	9781538725405
7/29/2024 4:25:30 PM	The village library demon-hunting society	Waggoner, C. M., author.	1106183	9781984805881
7/29/2024 4:25:33 PM	The witch of Colchis	Hewlett, Rosie, author.	1106186	9781728299013
8/1/2024 3:57:11 PM	Well plated every day : recipes for easier, healthier, more exciting daily meals : a cookbook	Clarke, Erin, author.	1106434	
8/7/2024 2:55:25 PM	Much ado about Margaret : a novel	Roux, Madeleine, 1985- author.	1108523	
8/7/2024 2:55:30 PM	Rachel Weiss's group chat	Appelbaum, Lauren, author.	1108527	
8/9/2024 1:36:06 PM	Bobby Flay : chapter one	Flay, Bobby, author.	1108876	

Bibliographic Record Bulk Change ✕

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Record status (05)
From: To:

Type of record (06)
From: To:

Bibliographic level (07)
From: To:

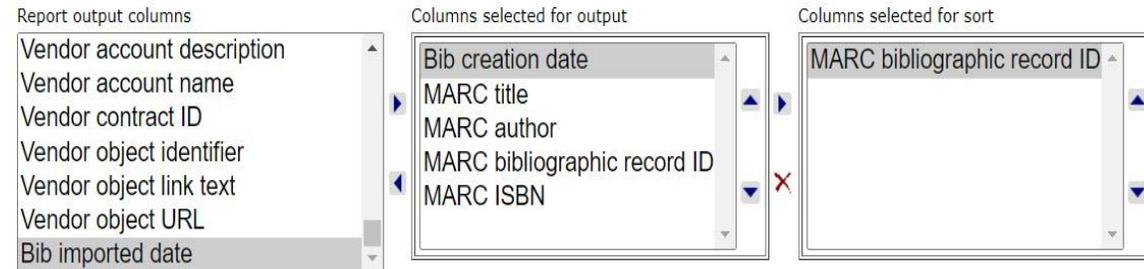
Type of control (08)
From: To:

Character coding scheme (09)
From: To:

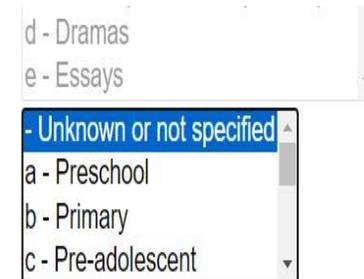
Encoding level (17)
From: To:

2nd Title Search: How many bibliographic records that the target audience is not specified?

1. Create a Bibliographic record report
2. Title status needs to be Final
3. Create a bibliographic record set with these titles;
4. At Staff client, bulk change these titles.



Include header rows
 Text file Delimiter type: Comma & Quotes

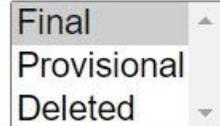


MARC target audience

Record status



Record status



2nd Title Search: How many bibliographic records that the target audience is not specified?

1. The saved Bibliographic record sets consists of titles for all age groups. They need to be converted as Item record sets so that the item records can be split out as separate record sets based on codes and call#.
2. Convert each item record set as Bibliographic record set again and bulk change the audience code (008, audience 22)

Download report output

Save report parameters for later use

Create bib record set from report results

There were 48 results, to download the report use the checkbox (above).

CreationDate	BrowseTitle	BrowseAuthor	BibliographicRecordID	ISBN
4/15/2024 9:57:09 AM	I'll be waiting : a novel	Armstrong, Kelley, author.	1091407	9781250284211
4/15/2024 9:57:13 AM	The Great Hippopotamus Hotel	McCall Smith, Alexander, 1948- author.	1091414	
5/24/2024 9:29:15 AM	Born of gilded mountains : a novel	Dykes, Amanda, author.	1096752	
5/24/2024 9:29:19 AM	Coal black lies	Sproles, Cindy, author.	1096758	
5/24/2024 9:29:30 AM	Jackpot summer	Friedland, Elyssa, author.	1096775	
5/24/2024 9:29:36 AM	Meet me at the Starlight : a novel	Hauck, Rachel, 1960- author.	1096784	9781420516906
5/24/2024 9:29:40 AM	Oye : a novel	Mogollon, Melissa, author.	1096791	
6/10/2024 10:41:07 AM	If only	Hjorth, Vigdis, author.	1099663	9781839768880
6/12/2024 3:24:07 PM	If I stopped haunting you	Wilkins, Colby, author.	1099885	
6/13/2024 3:24:11 PM	The Oregon Trail	Johnstone, William W., author.	1100203	9781420515107
7/8/2024 1:18:36 PM	The things we didn't know	Pérez, Elba Iris, author.	1103359	9781420515800
7/10/2024 3:20:09 PM	Defectors : the rise of the Latino far right	Ramos, Paola, 1987- author.	1105016	
8/1/2024 3:57:11 PM	Well plated every day : recipes for easier, healthier, more exciting daily meals : a cookbook	Clarke, Erin, author.	1106434	
8/7/2024 2:55:25 PM	Much ado about Margaret : a novel	Roux, Madeleine, 1985- author.	1108523	
8/7/2024 2:55:30 PM	Rachel Weiss's group chat	Appelbaum, Lauren, author.	1108527	
8/9/2024 1:36:06 PM	Bobby Flay : chapter one	Flay, Bobby, author.	1108875	
8/9/2024 1:36:10 PM	Credit repair	Loftsgordon, Amy, author.	1108882	
8/12/2024 5:53:24 PM	Murder backstage : a novel	Fletcher, Jessica, author.	1109163	
8/14/2024 4:46:01 PM	American rapture	Leede, CJ, author.	1109459	
8/14/2024 4:46:05 PM	Blood test	Baxter, Charles, 1947- author.	1109463	
8/14/2024 4:46:07 PM	The bone picker : native stories, alternate histories	Mihesuah, Devon A., 1957- author.	1109465	
8/14/2024 4:46:10 PM	The Christmas countdown	Cassidy, Holly, author.	1109470	
8/14/2024 4:46:24 PM	Love can't feed you : a novel	Sy, Cherry Lou, author.	1109485	
8/14/2024 4:46:26 PM	Model home	Solomon, Rivers, author.	1109487	
8/16/2024 2:24:03 PM	A winter wish : a novel	Stone, Emily, 1989- author.	1109637	
8/19/2024 9:13:04 AM	Abandoned : chronicling the journeys of once forsaken dogs	Carver, Katherine, author.	1109683	
8/20/2024 2:50:06 PM	The fabled Earth : a novel	Brack, Kimberly, author.	1109811	9781400234726

Close window

2nd Title Search: How many bibliographic records that the target audience is not specified?

- Sample: how the absent target audience impact the search results at PAC:

The screenshot displays a library search interface. On the left, there are filter sections for 'Language' and 'Target Audience'. The 'Target Audience' section has 'Unknown or not specified (9205)' highlighted in yellow. The main search results area shows three items:

- 1. Birthday party** (1988): Call Number: E PUZZLE BIRTHDAY PARTY. Description: 1 puzzle (5 pieces, 1 inlay board) : wood, col. ; 30 x 23 x 1 cm.
- 2. Farm peg number eight-five** (1997): Description: 1 puzzle (9 pieces, 1 inlay board) : wood, col. ; 22 x 30 cm.
- 3. Local climatological data. Chicago, Illinois. O'Hare International Airport. Monthly summary.** (2020): Description: 1 text file: digital.

Each result includes options for 'AVAILABILITY', 'FULL DISPLAY', and 'PLACE REQUEST', along with an 'Add to My List' button. The top of the results area shows '1 - 10 of 100000+' and '10 PER PAGE'.

Orders And Payment

IUG 2025

Purchase Order & Status:

- I wonder how many items my department ordered, cancelled, and how much money has been encumbered, during any period of a year.

Create an PO Report:

Report type: Purchase order list reports | Report created by: simplyreports
 Created on: 7/19/2024 1:19:19 PM | Last run date: 8/28/2024 2:39:09 PM
 Report name: OS POReportwx | Report description: OSPoReportwx

Report output columns: Fiscal year ID, Fiscal year name, Fund alternative name, Fund currency, Fund external name, Fund name, Item assigned branch abbreviation

Columns selected for output: Purchase order number, Item price, Purchase order line status, Segment payment status, Purchase order release date, MARC publication year

Columns selected for sort: Purchase order number

Text file | Delimiter type: Comma & Quotes
 Excel file

Fiscal year status (select one): Open Closed Encumbrances closed
 Fiscal Year: 2024 (OPPLBranch)

Report type: Purchase order list reports | Report created by: simplyreports
 Created on: 7/19/2024 1:19:19 PM | Last run date: 8/28/2024 2:39:09 PM
 Report name: OS POReportwx | Report description: OSPoReportwx

Report output columns: Fiscal year ID, Fiscal year name

Columns selected for output: Item assigned collection name, tem barcode, tem call number, Material type, tem statistical code, tem shelf location

Columns selected for sort: Purchase order number

Text file | Delimiter type: Comma & Quotes
 Excel file

Fiscal year status (select one): Open Closed Encumbrances closed
 Fiscal Year: 2024 (OPPLBranch)

Fund currency
 Fund external name
 Fund name
 Item assigned branch abbreviation
 Item shelf location
 MARC sort title
 Purchase order line amount

Purchase Order & Status:

- **Save report parameters for later use.**

Before Running the saved PO report, do these:

- **Hit Edit and change fiscal year; date range and save;**
- **Go back to homepage and hit “My Reports”;**
- **From the saved reports, highlight the needed PO report;**
- **Check box of report and Hit “Run Reports”**
- **File is created and Download the MS Excel file.**

The screenshot shows a report configuration interface. At the top, there are two dropdown menus: 'Collection' and 'Creator'. The 'Collection' dropdown is open, showing a list of options: 'OS Archives - Physical Item', 'OS AudioBook Fic', 'OS AudioBook NF', and 'OS Biography Audiobook'. The 'Creator' dropdown shows '3MPapiUser (Deleted)'. To the right of these dropdowns is a checkbox labeled 'Not present'. Below these is a green header for 'Item date filters'. Under this header, there are three filter rows. The first row is 'PO release date' with a checked checkbox, a date input field containing '1/1/2024', a calendar icon, another date input field containing '10/25/2024', and another calendar icon. The second row is 'Creation date' with a checked checkbox, a date input field containing '1/1/2024', a calendar icon, another date input field containing '10/25/2024', and another calendar icon. The third row is 'PO release date between' with an unchecked checkbox, an empty date input field, a 'Days' dropdown menu, and the text 'ago and the report run date'. Below the filters are three checkboxes: 'Download report output', 'Save report parameters for later use', and 'Create bib record set from report results'. A red arrow points to the 'Save report parameters for later use' checkbox.

There were 115 results, to download the report use the checkbox (above).

Purchase Order & Status:

Note:

- PO Line item\$ ≠ Item\$
- You cannot create a record set for this report
- Excel is the only format for this PO report.

Saved reports

Select one or more report types

- Item statistical reports
- Patron account count reports
- Patron account list reports
- Patron account statistical reports
- Patron count reports
- Patron list reports
- Patron statistical reports
- Purchase order list reports
- Purchase order summary reports
- Serials count reports
- Serials list reports
- Serials statistical reports

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input checked="" type="checkbox"/>	OS POReportwx	OSPReportwx	7/19/2024	8/28/2024	simplyreports	Purchase order list reports	Delete Edit

Schedule reports Run reports Publish report Advanced publish

Selected reports

Report number	Report name	Report description
182	OS POReportwx	OSPReportwx

Execution summary:

Report Number: 182 OS POReportwx **execution complete** To download this report click [here](#)

Item date filters

- PO release date 1/1/2024 10/25/2024
- Creation date 1/1/2024 10/25/2024
- PO release date between [] Days ago and the report run date

Purchase Order & Status:

Note:

- PO Line item\$ ≠ Item\$
- You cannot create a record set for this report
- Excel is the only format for this PO report.
- Purchase order report in Excel format:
- ** Item\$ is accurate as PO line amount displays multiple times based on copies and the price of all copies.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	PONumber	Item_price	POLineStatus	Segment Payment Status	POReleaseDate	MARCPublicationYear	ItemAssignedCollectionName	ItemBarcode	ItemCallNumber	MaterialType	ItemStatisticalCode	ItemShelfLocation	MARCSortTitle	POLineAmount
335	OS-AV-070824-SK	\$47.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic	31315007955292	OS AUDIOBOOK-BO CD JANCE	Audiobook CD	OS Audiobook	OS New Items	DEN OF INIQU	\$47.99
336	OS-AV-070824-SK	\$49.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic	31315007954832	OS AUDIOBOOK-BO CD PATRIC	Audiobook CD	OS Audiobook	OS New Items	NIGHT THE RIV	\$49.99
337	OS-AV-070824-SK	\$49.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic	31315007955789	OS AUDIOBOOK-BO CD STEEL,	Audiobook CD	OS Audiobook	OS New Items	TRIANGLE	\$49.99
338	OS-AV-070824-SK	\$49.99	Received	Paid	7/8/2024 18:45	2024	OS Biography Aud	31315007974061	OS AUDIOBOOK-BO CD BIOGR	Audiobook CD	OS Audiobook	Outreach Shelf	SEARCH FOR R	\$49.99
339	OS-AV-070824-SK	\$52.99	On Order	Open	7/8/2024 18:45	2024	OS AudioBook Fic		OS AUDIOBOOK-BO CD	Audiobook CD	OS Audiobook	OS New Items	COLLABORATC	\$52.99
340	OS-AV-070824-SK	\$52.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic		OS AUDIOBOOK-BO CD	Audiobook CD	OS Audiobook	OS New Items	BANDIT HEAVI	\$52.99
341	OS-AV-070824-SK	\$52.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic	31315007955847	OS AUDIOBOOK-BO CD ROBBIE	Audiobook CD	OS Audiobook	OS New Items	PRESIDENTS L	\$52.99
342	OS-AV-070824-SK	\$59.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic		OS AUDIOBOOK-BO CD	Audiobook CD	OS Audiobook	OS New Items	INSIGNIFICAN	\$59.99
343	OS-AV-070824-SK	\$59.99	Received	Paid	7/8/2024 18:45	2024	OS AudioBook Fic	31315007974046	OS AUDIOBOOK-BO CD PERRIN	Audiobook CD	OS Audiobook	Outreach Shelf	FORGOTTEN C	\$59.99
344	OS-AV-070824-SK	\$59.99	Received	Paid	7/8/2024 18:45	2024	OS TV Series DVD	31315007974012	OS DVD TV SERIES UNDERGRO	DVD	OS Movie DVD	Outreach Shelf	UNDERGROU	\$119.98
345	OS-AV-070824-SK	\$59.99	Received	Paid	7/8/2024 18:45	2024	OS TV Series DVD	31315007974038	OS DVD TV SERIES UNDERGRO	DVD	OS Movie DVD	Outreach Shelf	UNDERGROU	\$119.98
346	OS-AV-070824-SK-2	\$23.74	Received	Paid	7/8/2024 14:53	2020	OS AudioBook Fic	31315007973998	OS AUDIOBOOK-BO CD MALD	Audiobook CD	OS Audiobook	Outreach Shelf	CIPHER	\$23.74
347	OS-AV-070824-SK-2	\$23.74	Received	Paid	7/8/2024 14:53	2021	OS AudioBook Fic	31315007973964	OS AUDIOBOOK-BO CD MALD	Audiobook CD	OS Audiobook	Outreach Shelf	DIFFERENT DA	\$23.74
348	OS-AV-070824-SK-2	\$30.91	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955060	OS AUDIOBOOK-BO CD COLEM	Audiobook CD	OS Audiobook	OS New Items	BLIND TO MID	\$30.91
349	OS-AV-070824-SK-2	\$30.91	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955383	OS AUDIOBOOK-BO CD HAMIL	Audiobook CD	OS Audiobook	OS New Items	HONORABLE A	\$30.91
350	OS-AV-070824-SK-2	\$30.91	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955433	OS AUDIOBOOK-BO CD PHELAI	Audiobook CD	OS Audiobook	OS New Items	SPY	\$30.91
351	OS-AV-070824-SK-2	\$30.94	Received	Paid	7/8/2024 14:53	2021	OS AudioBook Fic	31315007973956	OS AUDIOBOOK-BO CD RUTLE	Audiobook CD	OS Audiobook	Outreach Shelf	WEST WITH G	\$30.94
352	OS-AV-070824-SK-2	\$34.91	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955078	OS AUDIOBOOK-BO CD HOOD,	Audiobook CD	OS Audiobook	OS New Items	BURN OUT	\$34.91
353	OS-AV-070824-SK-2	\$34.95	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955375	OS AUDIOBOOK-BO CD BARTO	Audiobook CD	OS Audiobook	OS New Items	TALKING TO S	\$34.95
354	OS-AV-070824-SK-2	\$36.51	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007974020	OS AUDIOBOOK-BO CD PODOL	Audiobook CD	OS Audiobook	Outreach Shelf	RECRUITER	\$36.51
355	OS-AV-070824-SK-2	\$36.94	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955458	OS AUDIOBOOK-BO CD ROBB,	Audiobook CD	OS Audiobook	OS New Items	PASSIONS IN E	\$36.94
356	OS-AV-070824-SK-2	\$37.79	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315009287470	OS AUDIOBOOK-BO CD WISE,	Audiobook CD	OS Audiobook	Outreach Shelf	HOLY CITY A N	\$37.79
357	OS-AV-070824-SK-2	\$38.94	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007973980	OS AUDIOBOOK-BO CD WARE,	Audiobook CD	OS Audiobook	Outreach Shelf	ONE PERFECT	\$38.94
358	OS-AV-070824-SK-2	\$38.94	Received	Paid	7/8/2024 14:53	2024	OS Biography Aud	31315007973972	OS AUDIOBOOK-BO CD BIOGR	Audiobook CD	OS Audiobook	Outreach Shelf	ONCE UPON A	\$38.94
359	OS-AV-070824-SK-2	\$39.71	Received	Paid	7/8/2024 14:53	2024	OS AudioBook Fic	31315007955086	OS AUDIOBOOK-BO CD SWART	Audiobook CD	OS Audiobook	OS New Items	ENEMY OF TH	\$39.71

Invoices And Payment

IUG 2025

Invoices And Payment:

- I wonder how many items we ordered are received, paid, or unpaid, During any period of a year.

- Create an Invoice Report:

The screenshot shows the 'SimplyReports' interface with the 'Invoices' menu highlighted. The report configuration is as follows:

- Report type: Invoice list reports
- Report created by: simplyreports
- Created on: 8/23/2024 1:51:27 PM
- Last run date: 8/28/2024 3:02:04 PM
- Report name: OSInvoiceRptWX
- Report description: OSInvRptWX

Report output columns: Fiscal year ID, Fiscal year name, Fund alternative name, Fund currency, Fund external name, Fund ID, Invoice date.

Columns selected for output: Invoice creation date, Item price, Fund name, Supplier name, Purchase order number, Item shelf location.

Columns selected for sort: Invoice creation date.

Options: Text file, Excel file. Delimiter type: Comma & Quotes.

Fiscal year status (select one): Open, Closed, Encumbrances closed.

Fiscal Year: 2024 (OPPLBranch)

The screenshot shows the 'SimplyReports' interface for creating an Invoice report. The report configuration is as follows:

- Report output columns: Fiscal year ID, Fiscal year name, Fund alternative name, Fund currency, Fund external name, Fund ID, Invoice date.
- Columns selected for output: Invoice number, Invoice status, Item assigned collection name, Item barcode, Item call number, Item statistical code.
- Columns selected for sort: Invoice creation date.

Options: Text file, Excel file. Delimiter type: Comma & Quotes.

The screenshot shows the 'SimplyReports' interface for creating an Invoice report. The report configuration is as follows:

- Report output columns: Fiscal year ID, Fiscal year name, Fund alternative name, Fund currency, Fund external name, Fund ID, Invoice date.
- Columns selected for output: Item assigned collection name, Item barcode, Item call number, Item statistical code, MARC sort title, Invoice line amount.
- Columns selected for sort: Invoice creation date.

Options: Text file, Excel file. Delimiter type: Comma & Quotes.

Invoices And Payment:

- I wonder how many items we ordered are received, paid, or cancelled, During any period of a year.
- Continue to Create an Invoice Report:

Item general filters

Item record set

Assigned branch:

Branch

- Orland Park Public Library Branch
- Outreach Branch
- Reciprocal Branch
- zzz-NOT USE

Record status

- Final
- Provisional
- Deleted

Shelf location

- New TV Series -- (Org: OPPLBranch)
- Newbery -- (Org: OPPLBranch)
- Nonfiction Movie Shelf -- (Org: OPPLBranch)
- OS New Items for 2 Months -- (Org: OPPLBranch)**
- Outreach Shelf -- (Org: OPPLBranch)
- PAL PAKS -- (Org: OPPLBranch)

Shelving scheme

- No information
- Library of Congress

Invoice date filters

Creation date

1/1/2024  10/25/2024 

Invoice date

Invoices And Payment:

- Save report parameters for later use.

Before Running the saved Invoice report, do these:

- Hit Edit and change fiscal year; date range and save;
- Go back to homepage and hit “My Reports”;
- From the saved reports, highlight the needed invoice reports;
- Check box of report and Hit “Run Reports”
- File is created and Download the MS Excel file.

Saved reports

Select one or more report types

- Fund summary reports
- Hold count reports
- Hold list reports
- Hold statistical reports
- Invoice list reports**
- Invoice summary reports
- Item count reports
- Item list reports
- Item MARC Export
- Item statistical reports
- Patron account count reports
- Patron account list reports

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	FOIA Inv Date 2015 Item Creation Date 2014		5/7/2015	9/8/2017	simplyreports	Invoice list reports	Delete Edit
<input checked="" type="checkbox"/>	OSInvoiceRptWX	OSInvRptWX	8/23/2024	8/28/2024	simplyreports	Invoice list reports	Delete Edit

Schedule reports **Run reports** Publish report Advanced publish

Invoices And Payment:

Note:

1. Invoice Line item\$ ≠ Item\$
2. You cannot create a record set for this report
3. Excel is the only format for this Invoice report.
4. EDI order? Change market price as discount price at 970 tag on Marc File. Item's\$ will match invoice\$.

The screenshot shows the 'SimplyReports' interface. At the top, there are navigation tabs for 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', and 'Serials'. Below these, there are links for 'My reports' and 'File maintenance'. The 'Selected reports' section contains a table with one report:

Report number	Report name	Report description
184	OSInvoiceRptWX	OSInvRptWX

Below the table is an 'Execution summary' section:

Report Number: 184 OSInvoiceRptWX **execution complete** To download this report click [here](#)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	InvCreation	Item_price	FundName	SupplierName	PONumber	ItemShelfl	InvNumbe	InvoiceSta	ItemAssign	ItemBarco	ItemCallNo	ItemStatus	MARCSort	InvoiceLine	Amount
2	#####	40	OS Ingram	OS Ingram	OS-BK-012	Outreach	63021713	Paid	OS Large T	3.13E+13	OS 720.97	OS NF Boc	LOST IN AI	22.6	
3	#####	50	OS Ingram	OS Ingram	OS-BK-012	Outreach	63021713	Paid	OS Large T	3.13E+13	OS 779.2	OS NF Boc	HEAD OVE	28.25	
4	#####	35	AS Ingram	AS Ingram	OS-BK-012	Outreach	63022352	Paid	OS Large T	3.13E+13	OS 973.09	OS NF Boc	DINNER W	19.78	
5	#####	50	AS Ingram	AS Ingram	OS-BK-012	Outreach	63022352	Paid	OS Biograp	3.13E+13	OS BIOGR	OS NF Boc	BEHIND TH	28.25	
6	#####	55	AS Ingram	AS Ingram	OS-BK-012	Outreach	63022352	Paid	OS Biograp	3.13E+13	OS BIOGR	OS NF Boc	JOHNNY C	31.08	
7	#####	30	OS Ingram	OS Ingram	OS-BK-012	Outreach	63022847	Paid	OS Large T	3.13E+13	OS LT DAN	OS Fic Boc	REDWOOD	18	
8	#####	32	AS Ingram	AS Ingram	OS-BD-012	Outreach	63023284	Paid	OS Large T	3.13E+13	OS LT 910.	OS NF Boc	WAGER A	96	
9	#####	32	AS Ingram	AS Ingram	OS-BD-012	Outreach	63023284	Paid	OS Large T	3.13E+13	OS LT 910.	OS NF Boc	WAGER A	96	
10	#####	16.99	OS AV Oth	OS Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS Movie	3.13E+13	OS DVD HY	OS Movie	HYPNOTIC	16.99	
11	#####	59.99	OS AV Oth	OS Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS AudioB	3.13E+13	OS AUDIO	OS Audiob	TWENTY S	59.99	
12	#####	59.99	OS AV Oth	OS Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS AudioB	3.13E+13	OS AUDIO	OS Audiob	DID YOU F	59.99	
13	#####	26.99	AS Ingram	AS Ingram	OS-BK-012	Outreach	67683519	Paid	OS Large T	3.13E+13	OS LT CHR	OS Fic Boc	MURDER C	24.29	
14	#####	40.95	AS Ingram	AS Ingram	OS-BK-012	Outreach	67683519	Paid	OS Large T	3.13E+13	OS LT DAL	OS Fic Boc	WHERE CC	34.81	
15	#####	30	OS Ingram	OS Ingram	OS-BK-012	Outreach	67683448	Paid	OS Large T	3.13E+13	OS LT LAN	OS Fic Boc	AMERICAN	27	
16	#####	36.99	OS Ingram	OS Ingram	OS-BK-012	Outreach	67683448	Paid	OS Large T	3.13E+13	OS LT NUG	OS Fic Boc	STRANGE	31.44	
17	#####	31	AS Ingram	AS Ingram	OS-BK-012	Outreach	63025778	Paid	OS Large T	3.13E+13	OS LT WIL	OS Fic Boc	LOVE SON	18.6	
18	#####	16.99	OS AV Oth	Juv Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS Movie	3.13E+13	OS DVD PE	OS Movie	THANK YO	16.99	
19	#####	19.99	OS AV Oth	Juv Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS Foreign	3.13E+13	OS DVD AF	OS Movie	FOUR DAL	19.99	
20	#####	19.99	OS AV Oth	Juv Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS Foreign	3.13E+13	OS DVD FR	OS Movie	THREE ML	19.99	
21	#####	19.99	OS AV Oth	Juv Midwe	OS-AV-012	Outreach	5.05E+08	Paid	OS Movie	3.13E+13	OS DVD H	OS Movie	MORNING	19.99	

Invoices And Payment:

1. Share account? add more columns including PO#, Call#, Shelf location, etc. to support the report.

2. Invoice Line item\$ ≠ Item\$. The total paid price count all copies' price for each line.

3. This example shows the Item's price as market price that don't march paid price. The item's price at 970 tag needs to be updated.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	InvCreationDate	Item_price	FundName	SupplierName	PONumber	ItemShelfLocation	InvNumber	InvoiceStatus	ItemAssignedCollectionName	ItemBarcode	ItemCallNumber	ItemStatisticalCode	MARCSortTitle	InvoiceLineAmount
1	01/26/24	\$40.00	OS Ingram-04	OS Ingram-AS Acc	OS-BK-012424-SK	Outreach Shelf	63021713	Paid	OS Large Type	31315008889854	OS 720.973 CAH	OS NF Book	LOST IN AMERICA	\$22.60
2	01/26/24	\$50.00	OS Ingram-04	OS Ingram-AS Acc	OS-BK-012424-SK	Outreach Shelf	63021713	Paid	OS Large Type	31315008889862	OS 779.2 NEW	OS NF Book	HEAD OVER HEELS	\$28.25
3	01/27/24	\$35.00	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	63022352	Paid	OS Large Type	31315008968229	OS 973.099 PRU	OS NF Book	DINNER WITH THE	\$19.78
4	01/27/24	\$40.00	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	63022352	Paid	OS Large Type	31315008968237	OS 641.5 KIN	OS NF Book	AMERICAN TABLE	\$22.60
5	01/27/24	\$50.00	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	63022352	Paid	OS Biography B	31315008968716	OS BIOGRAPHY P	OS NF Book	BEHIND THE SEAM	\$28.25
6	01/27/24	\$55.00	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	63022352	Paid	OS Biography B	31315008968070	OS BIOGRAPHY C	OS NF Book	JOHNNY CASH THE	\$31.08
7	01/30/24	\$30.00	OS Ingram-04	OS Ingram-AS Acc	OS-BK-012424-SK	Outreach Shelf	63022847	Paid	OS Large Type	31315008968922	OS LT DAMERON	OS Fic Book	REDWOOD COURT	\$18.00
8	01/31/24	\$32.00	AS Ingram Copy	AS Ingram-Copy	OS-BD-012924-SK	Outreach Shelf	63023284	Paid	OS Large Type	31315008968492	OS LT 910.9164	OS NF Book	WAGER A TALE OF	\$96.00
9	01/31/24	\$32.00	AS Ingram Copy	AS Ingram-Copy	OS-BD-012924-SK	Outreach Shelf	63023284	Paid	OS Large Type	31315008968526	OS LT 910.9164	OS NF Book	WAGER A TALE OF	\$96.00
10	01/31/24	\$32.00	AS Ingram Copy	AS Ingram-Copy	OS-BD-012924-SK	Outreach Shelf	63023284	Paid	OS Large Type	31315008968534	OS LT 910.9164	OS NF Book	WAGER A TALE OF	\$96.00
11	02/01/24	\$16.99	OS AV Other-04	OS Midwest Tape	OS-AV-012424-SK	Outreach Shelf	504991601	Paid	OS Movie DVD	31315009298576	OS DVD HYPNOT	OS Movie DVD	HYPNOTIC	\$16.99
12	02/01/24	\$59.99	OS AV Other-04	OS Midwest Tape	OS-AV-012424-SK	Outreach Shelf	504991601	Paid	OS AudioBook	31315007952679	OS AUDIOBOOK-	OS Audiobook	TWENTY SEVEN MI	\$59.99
13	02/01/24	\$59.99	OS AV Other-04	OS Midwest Tape	OS-AV-012424-SK	Outreach Shelf	504991601	Paid	OS AudioBook	31315007952695	OS AUDIOBOOK-	OS Audiobook	DID YOU HEAR ABC	\$59.99
14	02/07/24	\$26.99	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	67683519	Paid	OS Large Type	31315009069977	OS LT CHRISTIE,	OS Fic Book	MURDER ON THE C	\$24.29
15	02/07/24	\$40.95	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	67683519	Paid	OS Large Type	31315009069985	OS LT DALLAS, SA	OS Fic Book	WHERE COYOTES H	\$34.81
16	02/07/24	\$30.00	OS Ingram-04	OS Ingram-AS Acc	OS-BK-012424-SK	Outreach Shelf	67683448	Paid	OS Large Type	31315008969821	OS LT LANGBEIN	OS Fic Book	AMERICAN MERMA	\$27.00
17	02/07/24	\$36.99	OS Ingram-04	OS Ingram-AS Acc	OS-BK-012424-SK	Outreach Shelf	67683448	Paid	OS Large Type	31315009069969	OS LT NUGENT,	OS Fic Book	STRANGE SALLY DI	\$31.44
18	02/07/24	\$31.00	AS Ingram Copy	AS Ingram-Copy	OS-BK-012424-SK	Outreach Shelf	63025778	Paid	OS Large Type	31315008969805	OS LT WILLIAMS,	OS Fic Book	LOVE SONG FOR RI	\$18.60
19	02/07/24	\$16.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS Movie NF D	31315009298881	OS DVD PERFORM	OS Movie DVD	THANK YOU AUSTR	\$16.99
20	02/07/24	\$19.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS Foreign Lang	31315009298766	OS DVD ARABIC	OS Movie DVD	FOUR DAUGHTERS	\$19.99
21	02/07/24	\$19.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS Foreign Lang	31315009299111	OS DVD FRENCH	OS Movie DVD	THREE MUSKETEER	\$19.99
22	02/07/24	\$19.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS Movie DVD	31315009298873	OS DVD HALLMA	OS Movie DVD	MORNING SHOW N	\$19.99
23	02/07/24	\$29.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS TV Series DV	31315007952778	OS DVD TV SERIE	OS Movie DVD	LAST OF US THE CC	\$29.99
24	02/07/24	\$29.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS TV Series DV	31315009298865	OS DVD TV SERIE	OS Movie DVD	SPECIAL OPS LIONE	\$29.99
25	02/07/24	\$36.99	OS AV Other-04	Juv Midwest Tape	OS-AV-012424-SK	Outreach Shelf	505018349	Paid	OS AudioBook	31315007952802	OS AUDIOBOOK-	OS Audiobook	WELCOME HOME S	\$36.99

Invoices And Payment:

- Your library has shared accounts? Add more columns including PO#, Call#, Shelf location, etc. to support this report.
- Invoice Line item\$ ≠ Item\$. The total paid price count all the copies' prices for each line.
- This example shows the Item's price as discount price at 970 tag on Marc File and Item's\$ matches invoice\$ now.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	InvCreationDate	Item_price	FundName	SupplierName	PONumber	ItemShelfLocation	InvNumber	InvoiceStatus	ItemAssign	ItemBarcode	ItemCallNumber	ItemStatistics	MARCSortTitle	InvoiceLine
2	01/21/25	\$12.96	OS Amazon	OS Amazon	OS-Amz-AV-011	OS New Items for 2	OS-Amz-A	Paid	OS Movie	31315009256301	OS DVD DEAD	OS Movie DV	DEAD DONT	\$12.96
3	01/21/25	\$17.96	OS Amazon	OS Amazon	OS-Amz-AV-011	OS New Items for 2	OS-Amz-A	Paid	OS Movie	31315009256319	OS DVD APART	OS Movie DV	APARTMENT	\$17.96
4	01/24/25	\$28.04	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	63143082	Paid	OS Large T	31315009020467	OS LT JOHNST	OS Fic Book	SOME DIE YC	\$28.04
5	01/25/25	\$17.40	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	63143648	Paid	OS Large T	31315009020731	OS LT CARTER	OS Fic Book	MOST WOND	\$17.40
6	01/25/25	\$18.00	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	63143648	Paid	OS Large T	31315009020707	OS LT LAWHO	OS Fic Book	FROZEN RIVE	\$18.00
7	01/25/25	\$18.00	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	63143648	Paid	OS Large T	31315009020715	OS LT BROOKS	OS Fic Book	HORSE	\$18.00
8	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020830	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
9	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020848	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
10	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020855	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
11	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020863	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
12	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020871	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
13	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020889	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
14	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020897	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
15	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020905	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
16	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020913	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
17	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020921	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
18	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020939	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
19	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020947	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
20	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020954	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
21	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020962	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
22	01/28/25	\$13.49	OS Ingram	OS Ingram	OS-BD-012225-S	OS New Items for 2	67781903	Paid	OS BookD	31315009020970	OS BOOK DISC	OS Fic Book	WHAT DO YC	\$202.35
23	01/28/25	\$21.24	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	67781903	Paid	OS Large T	31315009021085	OS LT LOWRY,	OS Fic Book	TREE TABLE	\$21.24
24	01/28/25	\$28.04	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	67781903	Paid	OS Large T	31315009021069	OS LT NESBITT	OS Fic Book	RIDERS OF TH	\$28.04
25	01/29/25	\$18.39	OS AV Oth	OS Midwe	OS-AV-012225-S	OS New Items for 2	5.07E+08	Paid	OS Movie	31315009256517	OS DVD MONS	OS Movie DV	MONSTER SU	\$18.39
26	01/29/25	\$24.74	OS AV Oth	OS Midwe	OS-AV-012225-S	OS New Items for 2	5.07E+08	Paid	OS Movie	31315009256533	OS DVD NEVER	OS Movie DV	NEVER LET G	\$24.74
27	01/29/25	\$52.99	OS AV Oth	OS Midwe	OS-AV-012225-S	OS New Items for 2	5.07E+08	Paid	OS AudioB	31315007970226	OS AUDIOBOC	OS Audiobook	MORE OR LE	\$52.99
28	02/04/25	\$19.20	OS Ingram	OS Ingram	OS-LP-012225-S	OS New Items for 2	63145042	Paid	OS Large T	31315009021887	OS LT MOVIES	OS Fic Book	WE ALL LIVE	\$19.20

Tips For Creating The Successful Reports:

- Be Familiar With Your Collections:
 - Collection Code
 - Material Type Code
 - Shelf Location Code
 - Statistical Code
 - Loan Period/Fine Code/Renew Limit
 - Patron Code
 - ...
- Understand SQL basics
- Understand your co-worker's needs

What Reports SimplyReports CANNOT make?

- To save all Bibliographic records (print) that consist of 007 tag in a record set;
- To made a record set consist of all bibliographic records that their UPC or second ISBN or OCLC number is absent;
- ...

SQL Search May Help. Please Contact Polaris Support Team

SQL Search example:
select br.bibliographicrecordid
from bibliographicrecords br
(nolock)
join bibliographictags bt (nolock)
on
br.bibliographicrecordid=bt.bibliographicrecordid
where bt.tagnumber like '7' and
br.primarymarctomid in (1,27)



THANK YOU

Questions?

Wendy Xie

wxie@orlandparklibrary.org