

Saved Reports

Reports

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About Saved Reports



Alexandria makes it easy to build your own frequently-used, custom reports. The Saved tab contains custom reports that you (or others) have created, saved, and shared.

Select a report from the Report Selection pane to populate the Selected Report pane below. Saved reports tabs—Overview, Selections, Options, Notification, Schedule, and FTP—contain settings that are essential to how your reports are ordered, organized, and presented.

Saved reports can be run, modified, duplicated, or removed.



Saved reports only keep the selection criteria used to create the report, not the results of the report itself.

Toolbar



Lock/Unlock. Click the padlock to unlock the record for editing.

Saved Reports

Actions

Last Updated: May 2019
Duplicate Report. Should you want nearly identical settings for a custom-created report, this allows you to make a copy of the selected Saved report, give it a new name, and make whatever changes you require.

- **Delete Report.** Permanently delete the selected saved report.
- **Switch Site.** In a Central Union, click this icon to change the site you're working in.



Operations Management. Go to Operations Management to view and download your finished reports.



Support. Having trouble? This will open support documentation for this topic in another tab.

Categories

Reports are organized in categories and subcategories. Click the arrow to expand or contract the subcategories. Select a category or subcategory title to view the list of associated reports in the Report Selection pane. For example, if you want to run a *Charges and Overdue Fines* report, there are three ways to find it:

1. Select **All Reports**.
2. Select the **Circulation** category.
3. Expand the Circulation category and then select the **Charges and Payments** subcategory.

Remember, the list of available reports depends on both the category/subcategory you've selected *and* whether you're in the Quick or Saved tab.

Report Selection Filters

Once you've selected a category or subcategory, the associated reports will be listed in the Reports Selection pane on the right. You can further narrow your the list of reports using filters. In some ways, these filters far surpass the usefulness of the Categories pane. In fact, you may find yourself never using the Categories filters again, preferring instead to use the All Reports category in conjunction with the filter bar.



Favorite. See the reports marked as Favorite.



Operator. See reports you (the current operator) have saved.



Filter. Enter a term to filter by report title.

Filters can be applied in various ways. For example:

- To see only copy label-related reports, select the Copies category and type "labels" in the filter bar.
- To see all types of label reports, select the All Reports category and type "labels" into the filter bar.
- To see all shared label reports, select the All Reports category, select the Shared filter, and type "labels" into the filter bar.

Once you've sufficiently narrowed your filter criteria, scroll through the Report Selection list to locate and select the specific report you would like to view, modify, or run.

Create a Saved Report

1. Go to **Tools > Reports**.
2. With the Quick tab selected (default), use the Categories pane and report filters to locate and select the template you want to use.
3. At the bottom of the Selections tab, click **Create Saved Report**.
4. Enter a name for the new saved report (optional), then click **OK**.
5. Modify the settings in each tab, then click **Save**.



Having trouble with a Saved report? It's possible that the template you used to create it has changed or was removed, causing problems with your saved report Try recreating the report with a Quick reports template. See [Legacy Reports](#) for more information.

Overview

Overview

The Overview tab serves as a report summary, including the title (e.g. Mrs. Smith - Overdues), report creator, usage notes (e.g. Run this report weekly!), and allows you to mark it as a favorite.

Overview	Selections	Options	Schedule	Notification	FTP
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Name

Created By: demo, demo - COMPanion Demonstration Library

Notes

Favorite ★

Run

Settings

Name

Enter or edit the name of the report here (e.g. Dr. Linus - LOST books).

Created By

This information is automatically populated with the report creator's name and site ID code.

Notes

You can provide general usage notes about the report here (e.g. Report created for Marjorie - Run daily!).

Favorite

When this option is checked, the report is classified as a "favorite." This is especially helpful if you find yourself running the same reports regularly.

Selections

Selections

The Selections tab is where you build the report to suit your needs. If you find some of your reports lacking the necessary selection information, try checking the Show Additional Selections box for more options. The settings in this tab vary per report.

Overview **Selections** Options Schedule Notification FTP

Include records for:

Patrons with a Status of

Patrons in Security Group

Patrons with a Policy of

Patrons from From Through

Patrons in Grade From Through

Patrons added From MM/DD/YYYY Through MM/DD/YYYY

Show Additional Selections Run

Advanced Selections

Say you wanted to run a *Loaned Items Information* report for everyone *but* staff. How do you let Alexandria know to include everyone else? Some report selections have a dropdown menu with the option to include or exclude multiple policies. The logic of OR and AND NOT Boolean operators is used in these advanced selections.

Selections Options

Create labels with patron barcodes. This report is formatted for 3x10 label sheets (COMPANION Part Number V0055). Include records for:

Patrons at Site

Patrons with a Status of

Patrons in Security Group

Patrons with a Policy of

- ✓ Any Policy
- Include...
- Exclude...

Patrons from From Through

Patrons in Grade From Through

Patrons added From MM/DD/YYYY Through MM/DD/YYYY

NOTE: For labels to print correctly, set your printer page scaling to none or 100%.

Show Additional Selections Create Saved Report Run

Dropdown menu options:

- **Any Policy:** All policies will be included.
- **Include:** Only the policies you check will be included (OR). Patrons do not need to concurrently belong to all selected policies to be included.
- **Exclude:** All policies except the ones you check will be included (AND NOT).

Once you select **Include** or **Exclude**, a **Set** button will appear to the right of the dropdown menu. Click on it to check the boxes of policies you want to include or exclude in the report, and click **Set** when you're done.



Exclude these
Patrons with a Policy of

<input type="checkbox"/>	Elementary Student
<input type="checkbox"/>	High Student
<input type="checkbox"/>	Middle Student
<input checked="" type="checkbox"/>	Staff
<input type="checkbox"/>	Standard Patron
<input type="checkbox"/>	System Patron

Clear Cancel Set



Advanced Selections for patron policies is currently available for [Patrons](#) and [Circulation](#) reports.

Relative Dates

When it comes to selections requiring a time period, you can enter either a date range or relative date. With [relative dates](#), you can choose a generalized time period (i.e. "two weeks" or "one month"), which makes it easy to save and schedule reports like [notices](#).

Options

Options

Choose the sort and format options here. The settings in this tab vary per report.

Overview Selections **Options** Schedule Notification FTP

Sort by Last Name ▼

Format 2 Per Page ▼

Letter Text

Here is your barcode ID and Username for accessing the library catalog. This information is necessary for accessing your patron status details which includes a list of items you have checked out and their due dates, holds and reservations you have placed and their expiration dates, and any charges you owe the library. You will need this information to place holds or reservations if you are allowed to do so. You may change your username and password using the Alexandria Researcher application or using the Alexandria Web Catalog.

Run

Schedule

Schedule

Use these settings to schedule this report to run on a regular basis.



The scheduled time is the time the report is added to your [Operations queue](#). Depending on how busy your queue is, the report may or may not be complete at that exact time.

Overview
Selections
Options
Schedule
Notification
FTP

Schedule Report 13

Frequency Once ▾

On MM/DD/YYYY 13

At
HH :
 MM
PM

Run

Settings

Schedule

Check this box to unlock the Saved report scheduling capabilities.

Frequency

This dropdown menu allows you to specify how often you would like to repeat your Saved report. You can select Once, Daily, Weekly, Monthly, Yearly from this drop-down menu. Secondary On options may dynamically appear, depending on your selection

At

Choose the time of day, including a.m. or p.m., to run the report.

Notification

Notification

If you want confirmation that your reports are being performed at the indicated times and sent to the appropriate people, check the Enable Email Notification box and provide email addresses in the fields below.

- For example: *johndoe@examplelibrary.com*

You can provide more than one email address separated by commas.

- For example: *johndoe@examplelibrary.com,janedoe@examplelibrary.com*

Overview	Selections	Options	Schedule	Notification	FTP
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If you want confirmation that your reports are being performed at the indicated times and sent to the appropriate people, check the **Enable Email Notification** box and provide email addresses in the fields below. You can provide more than one email address separated by commas.

Operators specified in the **Email Notification and Download Link To** field will be sent confirmation, a link to the Summary Report, *and* a link to download the report; those in the **Email Notification To** field will only be sent confirmation that the report was performed and a link to the Summary Report.

Enable Email Notification

Email Notification and Download Link To

Email Notification To

Run

Settings

Enable Email Notification

Check this box if you want to enable email notification, sent upon report completion.

Email Notification and Download Link To

In this field, provide the operator email addresses that Alexandria will use to send confirmation emails, a link to the Operation Summary, and a link to download the report.

Email Notification To

In this field, provide the email addresses that Alexandria will use to send notification emails when the report has finished printing and a link to the Operation Summary; you can provide more than one email address separated by commas.

FTP
FTP

Alexandria can save finished reports to an FTP server. These options allow you to specify the (secure) FTP server address and username/password credentials.

Overview
Selections
Options
Schedule
Notification
FTP

Alexandria can save finished reports to an FTP server. These options allow you to specify the (secure) FTP server address and username/password credentials.

Upload Report to FTP Server

Protocol FTP

Host

Port

Path

Username

Password

Test FTP Connection

Run

Settings

Upload Report to FTP Server

Check this box to set up your this option allow you to specify your (secure) FTP server URL and username/password credentials.

Protocol

If you'd like a more secure transmission that hides the username/password and encrypts the file content, FTP can be secured with SSL/TLS (i.e. "ftps://"). Be aware that the name "Secure FTP" can be confusing because it refers to two completely different protocols: "SFTP" and "FTPS". Whenever the term Secure FTP is used, it is necessary to specify whether the SSH-based or SSL-based file transfer protocol is meant. Alexandria supports FTPS; the SSL-based file transfer protocol.

Host

Enter the host name or IP address of the FTP server without the URL protocol. For example, myserveraddress.com. Don't worry about including the URL protocol/scheme (e.g. "ftp://") as this is automatically appended before the host name depending on your Protocol selection (above).

Port

While FTP typically runs over TCP port 21, FTPS (SSL/TLS) typically runs over port 21 or port 990. If you don't have permission to open multiple ports, both unencrypted FTP and encrypted FTPS will run over port 21.

Path

Enter the full path including directories and filename, such as `/directory/subdirectory/filename.txt`

Username and Password

Enter your FTP login credentials. If your FTP server is Provide a clear-text authentication and sign-in protocol in the form of a username and password. If your FTP server is configured to allow it, you can connect anonymously without having to enter anything

 If you find yourself uncertain what an FTP server actually is, it's essentially just a software application that uses the File Transfer Protocol (i.e. FTP), a protocol used for sharing files over the internet. There are several FTP server software packages available that you can download and use for free.

