

# Reports

## Contents

### Dashboard

### Circulation

- [Circulation Tabs](#)
- [Circulation Videos](#)

### Textbooks

- [Textbook Tabs](#)
- [Textbook Videos](#)

### Patrons

- [Patron Tabs](#)
- [Patrons Videos](#)

### Operations

- [Reports](#)
- [Labels](#)
- [Notices](#)
- [Utilities](#)
- [Import](#)
- [Export](#)

### Tools

- [Sites](#)
- [Calendars](#)
- [Policies](#)
- [Security](#)

### Preferences

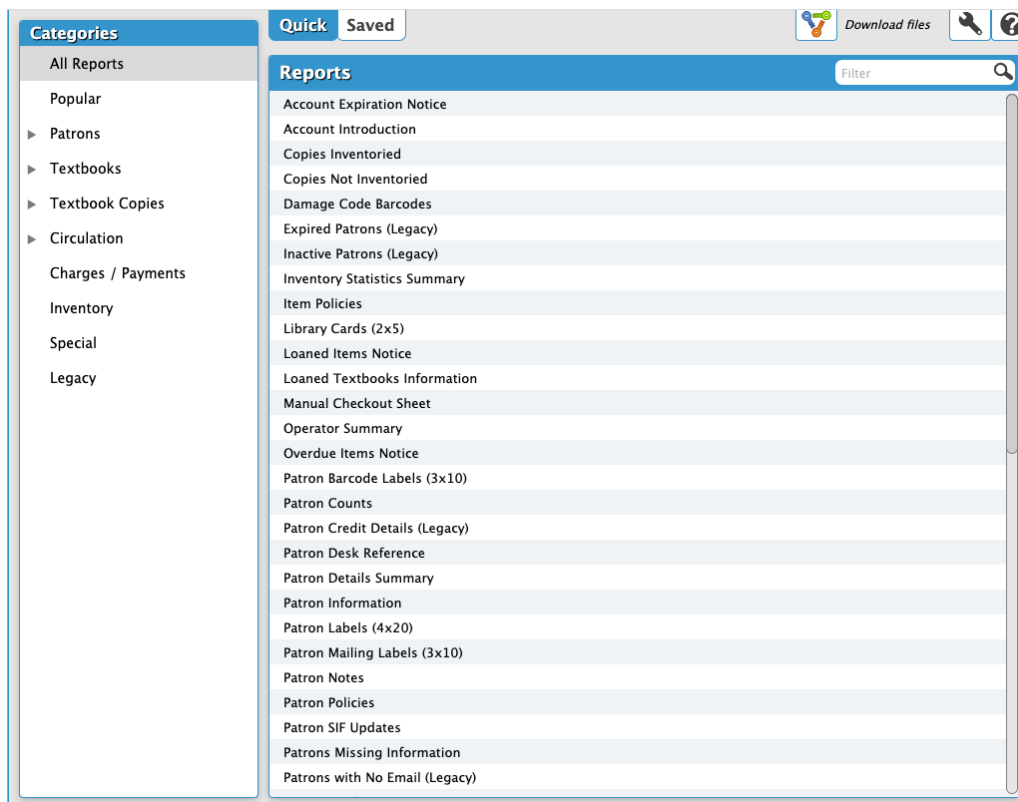
- [Patron Preferences](#)
- [Textbook Preferences](#)
- [Circulation Preferences](#)
- [Codes](#)
- [Sounds Preferences](#)
- [Setup Preferences](#)
- [SIS Integration](#)



see <https://support.goalexandria.com/operations/reports/>

Use our templates to customize and run a variety of reports that meet the form, content, and organizational requirements for your library, school, or district. Create reports that only include pertinent information, such as records of interest, transaction types, balance selections, personalized text on circulation notices, etc.

[Complete Reports List](#)



## Toolbar



**Quick/Saved.** Choose the Quick tab to run a one-time report, or choose the Saved tab to run one of your customized reports.



**Lock/Unlock.** Click the padlock icon to unlock it for editing.



**Actions.** Options to duplicate or delete a 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.

## Quick/Saved

The list of available reports and the options they contain depend on whether you're in the Quick or Saved tab.

## Quick Reports

Quick reports are basically templates that do not store custom selection settings and are mainly used for running one-time reports or as a foundation for custom Saved reports. Any modifications made to a particular report are discarded immediately upon clicking on another category or report title. However, if you would like to save the Quick report you've just modified, click **Create Saved Report** at the bottom of the Selected Report pane. After adjusting the default report name (optional), your new report—including custom settings—will be added to the Saved tab.

## Saved Reports

The Saved tab contains custom reports that you (or others) have created, saved, and shared. Saved reports can also be set to run on a schedule, emailed to the recipient(s) of your choice, and uploaded to an FTP server. Keep in mind that saved reports only keep the selection criteria used to create the report, not the results of the report itself. Saved reports can be run, modified, duplicated, or removed.

## 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

Once you've selected a category or subcategory, the associated reports will be listed in the Reports Selection pane on the right. You can search for a specific title in the filter bar and, in the Saved tab, you can further narrow the list of exports by Favorites, Shared, and Operator. 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 exports marked as Favorite.



**Shared.** See the exports marked as Shared.



**Operator.** See the exports that you (the current operator) have saved.



**Filter.** Enter a term to filter the exports by title.



Categories and filters can be applied in various ways. For example:

- **View only Catalog utilities:** Select the Title category and the Catalog subcategory.
- **View only copy label reports:** Select the Copies category and type "labels" in the filter bar.
- **View all label reports:** Select the All Reports category and type "labels" into the filter bar.
- **View all shared label reports:** Select the All Reports category, select the Shared filter, and type "labels" into the filter bar.

Scroll through the list to locate and select the specific report you would like to view, modify, or run. Remember, the list of available exports directly relates to the category you've selected and the filters you've applied.

## Selected Report

You can modify the report you've selected in the Selected Reports pane. Quick reports have only the Selections and Options tabs, while Saved reports allow more customization options. Each tab contains the settings and options you need to configure how your report is ordered, organized, scheduled, and presented.

### Quick Reports

SelectionsOptions

Include records for:

Patrons at SiteAMS - Adams Middle School

Patrons with a Status ofActive

Patrons in Security GroupAny Group

Patrons with a Policy ofAny Policy

Patrons fromHomeroomFromThrough

Patrons in GradeFromThrough

Patrons addedFrom MM/DD/YYYYThrough MM/DD/YYYY

☐ Show Additional Selections>Create Saved ReportRun

### Saved Reports

OverviewSelectionsOptionsScheduleNotificationFTP

Include records for:

Patrons at SiteAMS - Adams Middle School

Patrons with a Status ofActive

Patrons in Security GroupAny Group

Patrons with a Policy ofAny Policy

Patrons fromHomeroomFromThrough

Patrons in GradeFromThrough

Patrons addedFrom MM/DD/YYYYThrough MM/DD/YYYY

☐ Show Additional SelectionsRun

The controls at the bottom of the Selected Report pane depend on whether you're viewing a Quick or Saved report.

- **Show Additional Selections.** View a few additional options to further customize your report.
- **Create Saved Report.** Save this report with your custom settings so you can run it again later.
- **Run.** Run your report. When complete, the report will be logged in Operations Management.



If you're Self-Hosted, all report PDFs are saved to the Operation Files folder in your Alexandria Support directory.

## Overview

### Overview

Building reports in Alexandria is clear cut, streamlined, and simple. The Selections tab is where you build the report to suit your needs; there are no illogical selections, redundant options, or nonsensical Boolean operators to sift through—nothing is offered that that doesn't directly apply to the report you are running. The best way to use this tab is to fill in the fields and drop-down menus from left to right, top to bottom. If you find some of your reports lacking the necessary selection information, try checking the Show Additional Selections box to get more options.

Overview

Selections

Options

Schedule

Notification

FTP

Name

Created By:

demo, demo - Adams Middle School

Notes

Favorite

☐

★

Shared

☐

🔗

Run



Unknown macro: 'multiexcerpt-include-macro'

## 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 at Site

AMS - Adams Middle School

Patrons with a Status of

Active

Patrons in Security Group

Any Group

Patrons with a Policy of

Any Policy

Patrons from

Homeroom

From

Through

Patrons in Grade

From

Through

Patrons added

From MM/DD/YYYY

Through MM/DD/YYYY

☐ Show Additional Selections

Run

## 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

1 Line

Patron Name Format

☒ Full Name

☐ First Name Last Initial

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



Unknown macro: 'multiexcerpt-include-macro'

# Notification

## Notification



Unknown macro: 'multiexcerpt-include-macro'

Overview	Selections	Options	Schedule	Notification	FTP
<p>If you want confirmation that your reports are being performed at the indicated times and sent to the appropriate people, check the <b>Enable Email Notification</b> box and provide email addresses in the fields below. You can provide more than one email address separated by commas.</p> <p>Operators specified in the <b>Email Notification and Download Link To</b> field will be sent confirmation, a link to the Summary Report, <i>and</i> a link to download the report; those in the <b>Email Notification To</b> field will only be sent confirmation that the report was performed and a link to the Summary Report.</p> <p><input checked="" type="checkbox"/> <b>Enable Email Notification</b></p> <p>Email Notification and Download Link To <input type="text"/></p> <p>Email Notification To <input type="text"/></p> <p><b>Run</b></p>					



Unknown macro: 'multiexcerpt-include-macro'

## FTP

## FTP

Textbook Tracker 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 exampleserver.com

Port 21

Path /directory/subdirectory/filename.txt

Username jsmith

Password .....

Run



Unknown macro: 'multiexcerpt-include-macro'