Reports

Operations

Reports

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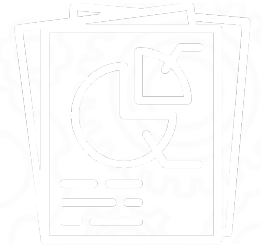
ⓘ This page has been moved to https://support.goalexandria.com/operations/reports/

⚠ **Reports** is now accessed through **Operations** in the sidenav. Learn more about the Alexandria Dream Makeover!

Coming soon: Reports will be split up into 3 types—informational Reports, email Notices, and Labels! We'll be sharing betas with our users in upcoming months.

- Complete Reports List

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.

Quick reports are meant to be run once, and then the settings are discarded. Create a saved report if you intend to run that particular report again, then you won't need to adjust the settings next time. 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. Finished reports can be downloaded as a PDF in Operations Management.

Take some time to explore the categories and subcategories and set up a few saved reports to save time in the future.

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.

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. Scroll through the list to locate and select the specific report you would like to view, modify, or run. In the Saved tab, you can further filter the list of reports by Favorites, Shared, and Operator (reports saved by you), or you can search for a specific report title.

Remember, the reports that appear in the Report Selection pane directly relate to the category (or subcategory) selected from the Categories pane and /or the information that is entered into the Filter bar.

Read more about filters in Saved Reports.

Selected Report

You can modify 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

Quick Reports

Saved Reports

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.

Customize and run a variety of reports that meet the form, content, and organizational requirements for your library.
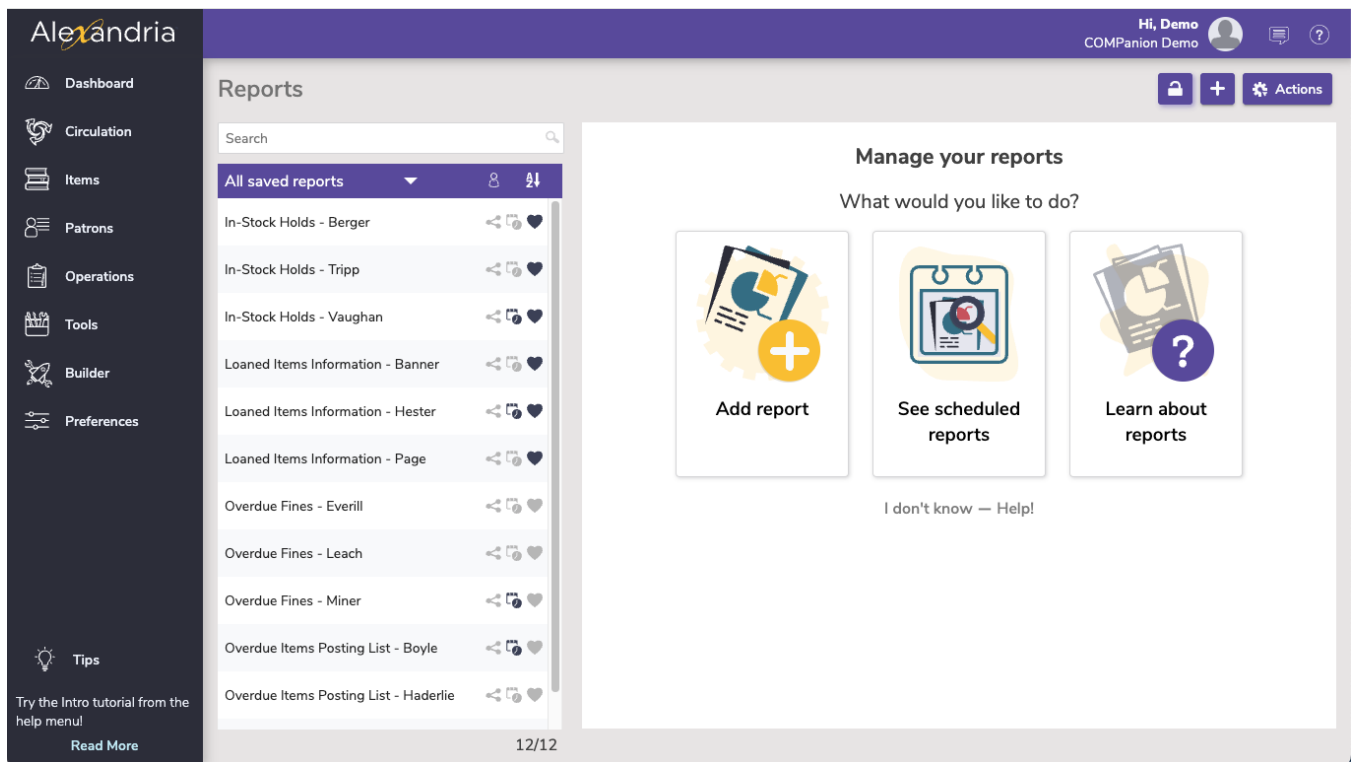
Navigation

Reports contains a few different areas, including:

- The top menu, which includes the Lock Icon, the ┿ to add a report, and the Actions menu.
- The records list on the left side, where you can sort/ filter reports.
- The details pane, which shows the **Add report**, **See scheduled reports**, and **Learn about reports** buttons, until a report is selected, when it will show the details of the selected report.

Actions Menu 🛠▾
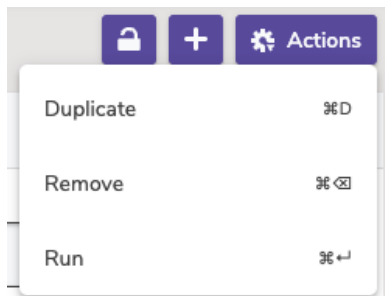
- **Duplicate.** Duplicate the selected report.
- **Remove.** Remove the selected report.
- **Run.** Run the selected report.

Create new report

The report templates are listed by category on the left, with more description of the report on the right, and an example PDF (if the Preview option is toggled).

Create new report

Browse through all the reports! For a complete list of reports and what they do, click the Help icon in the top right of the window.

Previews

Search
All Reports
Popular
Patrons ⌄
Titles ⌄
Copies ⌄
Circulation ⌄
Statistics / Usage
Charges / Payments
Holds
Inventory

Accelerated Reader Information
See Accelerated Reader information for selected titles.

example

Activity Summary
View library activity (visits) as recorded via the Activity add-on. Select by a specific date and/or activity.

example

Detailed

CANCEL   CREATE

✓ By default, reports are generated in PDF format. We recommend using the *most current* version of Adobe Reader as your default PDF viewer.

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

Running reports

Overview

The overview tab shows the **Report Name**, who created the report, any notes about the report, as well as selections to **Favorite**, **Share**, **Schedule**, and **Notify**.

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.

Share. Shares the report across all sites (for accounts with multiple sites).

Schedule. Check this box to unlock the report scheduling capabilities. The **Frequency** dropdown menu allows you to specify how often you would like to repeat your report. You can select Once, Daily, Weekly, Monthly, Yearly from this drop-down menu. Use the Around dropdown to choose a general time for your report to run.

Notify. 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.

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** box for more options. The settings in this tab vary per report.

Options

Choose how to **Format** and **Sort** your report in the Options tab.

Save to

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