How to add reports in the new beta-you beta be trying it!

January 22, 2024

Miss Honey has all of her librarians trying out the new Alexandria Reports beta, and they have some questions! Let's go over it together, shall we?

Alexandria		
🗥 Dashboard	Create new repo Browse through all the rep	eports! For a complete list of reports and what they do, click the Help icon in the top
💱 Circulation	right of the window.	Previews • 🗅
E Items	Search	
8≡ Patrons	Titles	Loaned Items Information See loaned items (including temporary items) for selected
Dperations	Copies	patrons.
Tools	Circulation	Overdue Items Information See information on overdue items for individual patrons.
្ហៃ Builder	Information	Overdue Items or Unpaid Charges Information Image: Charge Information </td
Preferences	Charges and Payments	Temporary Items Information n about View a list of loaned temporary items for selected patrons. aports
	Notices	view a list of loaned temporary items for selected pations.
	Reservations	
نيُّ: Tips	Statistics / Usage	
- Try the Intro tutorial from t	Charges / Payments	
help menu! Read More	CANCEL	CREATE

The first thing to know is that Reports are now separated into three areas-Informational Reports, Notices, and Labels.

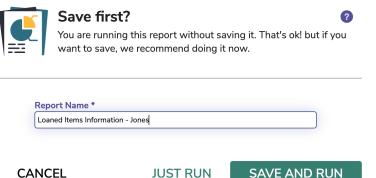
The new interface emphasizes the ability for you to create and run saved reports. It will probably feel like a few extra clicks getting started, but save you massive time in the long-run when all your frequently used reports are ready to go! And, if you want to run a one-off report, you can still do that, though we recommend creating saved reports for any report you will be using again.

Let's create the Loaned Items Information report for one specific homeroom as an example:

1. In the beta, go to Operations > Reports



- 2. Unlock Reports using the lock icon at the top right
- 3. Either click Add Report or the + icon
- 4. Select the Circulation > Information category on the list to the left
- 5. Select the Loaned Items Information template and then Create at the bottom right
- 6. On the Overview tab, enter the report name for easy identification "Loaned Items Information Jones"
- 7. Use the Selection tab to specify the information you want on the report Patrons from Homeroom Jones through Jones
 - a. Note Click Show Additional to see all fields you can select
- 8. The Options tab is where you will set the Format and Sorting of the report
- 9. When ready, you can either click Save, which will save the report but not run it at that time, or click Run and have the options Just Run or Sa
- ve and Run
- 10. That's it! Download your report from Operations.



CANCEL



See also Loaned Items Notice for teachers

Need help? Reach out to our amazing support team at (800) 347-4942 · support@companioncorp.com.



Try the Reports beta and give us your feedback!