

# Utilities

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## About



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

Most Circulation commands and operations are designed to modify individual pieces of data one entry at a time; utilities, however, can change large amounts of information in your database at once. They allow you to modify, clear, or clean required information, such as records of interest, title/copy policies, patron histories, and all types of circulation transactions. Using our templates, you can build utilities that modify, transfer, remove, update, or verify the information you require.

Utilities change large amounts of information in your database at once. Be *absolutely* positive that you want to perform the selected utility before clicking **Run**. Once these operations have been performed, they *cannot* be undone. If a utility is run incorrectly, your only recourse is to restore from a daily **Archive**.

## Toolbar

- Quick/Saved.** Choose the Quick tab to run a one-time utility, or choose the Saved tab to run one of your customized utilities.
- Lock/Unlock.** In a saved utility, click the padlock icon to unlock the 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 the log of your completed utility.
- Support.** Having trouble? This will open support documentation for this topic in another tab.

## Quick/Saved

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

### Quick Utilities

Quick utilities are basically templates: they do not store custom selection settings and are mainly used once or as a foundation for custom Saved utilities. Any modifications made to a particular utility are discarded immediately upon clicking on another category or utility title. If you'd like to save the Quick utility you've just modified, click **Create Saved Utility** at the bottom of the Selected Utility pane. After adjusting the default title (optional), your new utility—including custom settings—will be added to the Saved tab.

### Saved Utilities

The **Saved** tab only stores the selection criteria used to create the custom utility. It contains custom utilities that you (or others) have created, saved, and shared. When the Saved tab is selected, Favorite, Shared, and Operator filters (described below) are available Utility Selection pane. Saved utilities can also be set to run on a schedule and a confirmation can be automatically emailed to the recipient(s) of your choice.

## Categories

Utilities are organized in categories and subcategories. Select a category or subcategory title to view the list of associated reports in the Utility Selection pane. Selecting **All Utilities** at the top of the categories filter will populate the Quick and Saved tabs with all available utility options.

- **All Utilities** contains all the available utility types.
- **Patron** utilities allow you to remove groups of patrons, change patron policies, renew expired cards, or advance patron grades.
- **Textbook** utilities allow you add, modify, and remove information for any number of textbooks in your collection.
- **Textbook Copy** utilities allow you to add, modify, and remove information for any number of copies in your collection.
- **Circulation** utilities are used to clear patron histories, correct batches of incorrect due dates, or verify and update your circulation records.

## Utility Selection

Once you've selected a category or subcategory, the associated utilities will be listed in the Utility Selection pane on the right. You can filter the results further by entering a search term in the filter bar. Saved utilities can also be filtered by Favorites, Shared, and Operator. In some ways, these far surpass the usefulness of the Categories pane. In fact, you may find that you prefer to use the All Utilities category (default) in conjunction with the filter bar.



**Favorite.** See utilities marked as favorite.



**Shared.** See utilities marked as shared.



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



**Filter.** Enter a search term to filter by title.

The results in the Utilities list will only reflect utilities matching your category and filter criteria. For example, if you select Patrons from the Categories pane, the Utility Selection pane will only display custom-created patron utilities.

Once you've sufficiently narrowed your filter criteria, scroll through the Utility Selection list to locate and select the specific utility you'd like to view, modify, or run. The utility will populate in tabs below.

## Selected Utility

You can modify report you've selected in the Selected Utility pane. Each tab contains the settings and options you need to configure how the utility is performed. Quick utilities have only the Selections and Options tabs, while Saved utilities allow more customization options. The settings in the Selections and Options tabs are the same for both Quick and Saved utilities, though the settings in those tabs vary for each utility.

### Quick Utilities

SelectionsOptions

This utility will change the Copy Shelving to the value specified under the options tab. Change Copy Shelving for:

Copies at SiteAMS - Adams Middle School

Copies with a Status ofAny

Copies with a Policy ofAny Policy

Copies fromCopy LocationFromThrough

Copies addedFrom MM/DD/YYYYThrough MM/DD/YYYY

☐ Show Additional Selections>Create Saved UtilityRun

### Saved Utilities

OverviewSelectionsOptionsScheduleNotification

This utility will change the Copy Shelving to the value specified under the options tab. Change Copy Shelving for:

Copies at SiteAMS - Adams Middle School

Copies with a Status ofAny

Copies with a Policy ofAny Policy

Copies fromCopy LocationFromThrough

Copies 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.** Some utilities have uncommon or infrequently used selections initially hidden from view. Check this box to show them.
- **Create Saved Utility.** Save this utility with your custom settings so you can run it again later.

- **Run.** Run the utility and send a report to Operations Management.

# Overview

## Overview

The Overview tab provides a Saved utility summary.

Overview

Selections

Options

Schedule

Notification

Name

Change Copy Shelving

Created By:

demo, demo - Adams Middle School

Notes

Favorite

☐

★

Shared

☐

👁

Run

### Settings

#### Name

Enter or edit the name of the utility here (e.g. Remove Discarded Copies).

#### Created By

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

#### Notes

You can provide general usage notes about the utility here (e.g. Utility created for Marjorie - Run weekly).

#### 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.

#### Shared

When this option is checked, the report is classified as "shared." Sharing frequently-used utilities with other operators is often helpful when specifically configured utilities are frequently performed.

# Selections

## Selections

The Selections tab is where you build the utility to suit your needs. If you find some of your utilities lacking the necessary selection information, try checking the Show Additional Selections box for more options.

The options here are different for each utility. However, the options are the same in the Quick and Saved tabs for the same utility. For example, *Add Patron Notes* and *Change Review Status* utilities have different options in the Selections tab, but the selections for *Add Patron Notes* are the same in both the Quick and Saved tabs.

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Selections

Options

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Notification

This utility will change the Copy Shelving to the value specified under the options tab. Change Copy Shelving for:

Copies at Site

AMS - Adams Middle School

Copies with a Status of

Any

Copies with a Policy of

Any Policy

Copies from

Copy Location

From

Through

Copies added

From MM/DD/YYYY

13

Through MM/DD/YYYY

13

☐ Show Additional Selections

Run

## Options

### Options

The options in this tab are different for each utility. However, the options are the same in the Quick and Saved tabs for the same utility. For example, *Add Patron Notes* and *Change Review Status* utilities have different options in the Selections tab, but the selections for *Add Patron Notes* are the same in both the Quick and Saved tabs.

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Change Copy Shelving to

Run

## Schedule

### Schedule

Use these settings to schedule this utility to run on a regular basis. For example, if you want to run this report every Friday at 5:00 a.m, set the following:

- **Frequency:** Weekly
- **On:** Friday
- **At:** 05:00 AM



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

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☒ Schedule Utility 

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Frequency

Once

On

MM/DD/YYYY

13

At

HH

:

MM

PM

Run

## Settings

### Schedule

Check this box to unlock the scheduling capabilities.

### Frequency

This dropdown menu allows you to specify how often you would like to repeat this utility: Once, Daily, Weekly, Monthly, or Yearly.

### On

The options here depend on the frequency you selected above.

**Once.** Choose the date to run this utility.

**Daily.** On options are not necessary.

**Weekly.** Choose the day the utility will run each week.

**Monthly.** Choose the date the utility will run each month.

**Yearly.** Choose the month and date the utility will run each year.

### At

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

## Notification

### Notification

Here you can enable an email confirmation to be sent to the recipient(s) of your choice once the utility is complete.

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If you want confirmation that your utilities 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 Link To** field will be sent confirmation *and* a link to download the utility summary report; those in the **Email Notification To** field will only be sent confirmation that the utility was performed.

☒ Enable Email Notification

Email Notification To

Run



Unknown macro: 'multiexcerpt-macro'