Saved Utilities

Operations

Utilities

How helpful was this page?

Tell us what we can improve.

Related Blog Posts

Blog Posts

- Blog: Winter storms–recompute due dates created by Bethany Brown
  Jan 23, 2024
  Alexandria
- Blog: Keep track of items on display created by Bethany Brown
  Nov 02, 2022
  Alexandria
- Blog: Keeping track of patrons: Account expiration dates created by Bethany Brown
  Jul 06, 2022
  Alexandria
- Blog: End-of-year tips: Managing patrons created by Bethany Brown
  May 03, 2022
  Alexandria
- Blog: Are your Utilities running?—Take the right steps created by Bethany Brown
  Feb 16, 2022
  Alexandria
- Blog: Analyze your collection—Mitinet and Titlewave created by Morgan
  Aug 06, 2021
  Alexandria
- Blog: Removing holds—Easy as 1, 2, 3 created by Morgan
  Mar 10, 2021
  Alexandria
- Blog: Changing call numbers—helpful utilities created by Morgan
  Mar 03, 2021
  Alexandria
- Blog: Mystery, fantasy, classics—Adding genres created by Morgan
  Feb 24, 2021
  Alexandria
- Blog: My data!—All about archives created by Morgan

Feb 17, 2021
Alexandria

Save as PDF

About

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

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.

Using the Categories pane, Filter buttons, and Filter bar, the results in the Saved Utilities list will only reflect utilities pertaining to selected categories. For example, if you select Patrons from the utility Categories pane, the Utility Selection pane will only display custom-created patron utilities.

Selecting a Saved utility type from the Utility Selection pane automatically populates the bottom portion of the window (i.e. the Selected Utility pane), which contains utility information in the following tabs: Overview, Selections, Options, Notification, and Schedule. These tabs contain selection settings that are essential to how your utility is performed. By default, the Selections tab has focus when a Saved utility is selected.

Once a Saved utility has been selected, it can then be run, modified, duplicated, or removed.

Toolbar

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

Actions

- **Duplicate Report.** Make a copy of the selected Saved utility, give it a new name, and make whatever changes you require.

- **Delete Report.** Permanently delete the selected saved utility.

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 for your finished utilities.

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

Utility Selection Filters

Once you've selected a category or subcategory, the associated utilities will be listed in the Utility Selection pane on the right. You can further narrow your the list of utilities using filters. In some ways, these far surpass the usefulness of the Categories pane. In fact, you may find that you prefer to use the All Reports 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.

Saved Utilities

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

Create a Saved Utility

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

Overview
Overview

The Overview tab provides a Saved utility summary, including the utility name (e.g. Advance 4th Grade), utility creator, usage notes (e.g. *This utility needs to be performed weekly!*), and allows you to apply **Favorite** and **Shared** filters.

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 in this tab are different for each utility.

Options
Options

The options in this tab are different for each utility.

Settings

- **Sort By.** The selection made from the Sort By drop-down menu determines how information in the utility is ordered. Some selections sort by two (or more) values (e.g. Patron Level / Name).

Schedule
Schedule

Use these settings to schedule this utility to run on a regular basis. For example, if you want to run this utility 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.

Overview	Selections	Options	**Schedule**	Notification

☐ Schedule Utility 📅

Run

Schedule

Check this box to unlock the scheduling options.

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 if the utility is run daily.*

Weekly. Choose the day of the week to run this utility.

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

For an email confirmation that your utilities are being performed at the indicated times, check the Enable Email Notification box and enter the recipient email addresses in the fields below.

| Overview | Selections | Options | Schedule | **Notification** |

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 To** field will only be sent confirmation that the utility was performed.

☑ Enable Email Notification

Email Notification To [   ]

Run

Enable Email Notification

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

Email Notification To

Enter the email addresses that Alexandria will use to send notification emails from when the report has finished printing and a link to the Operation Summary. You can provide more than one email address separated by commas.

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