

Operations Management

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Operations is where you access **Reports**, **Labels**, **Notices**, **Utilities**, **Exports**, and **Imports**, and contains the feed of recent operations for you to email, view, and download. Operations is a transaction log for past and future operations.

Textbook Tracker

Dashboard

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Read More

Hi, Demo

Mia Middle School

Operations

<

>

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Filter

Show by type

All types

From

Today

User / Site

My Operations

☐ Completed operations only

Run Operations

Reports

Labels

Notices

Utilities

Export

Import

In-Stock Holds - Vaughan - MIA

09-08-2023 04:30:02 AM

Completed

Overdue Fines - Miner - MIA

09-08-2023 04:15:02 AM

Completed

Export Patrons - Middle Student - MIA

09-08-2023 04:10:02 AM

Completed

Export Patrons - High Student - ALX

09-08-2023 04:05:02 AM

Completed

Export Patrons - Elementary Student - EVE

09-08-2023 04:00:02 AM

Completed

Overdue Items Posting List - Boyle - MIA

09-08-2023 04:00:02 AM

Completed

Textbook Available Copies - Science - ALX

09-08-2023 03:45:02 AM

Completed

Completed operations shown in the queue include the name and status of the operation, and the time/date they were initiated. Some operations (reports, exports) that are currently running provide a **Cancel** button.







The status of an operation can be one of four things:

Running. This status shows the operation currently being performed; it provides the progress of the operation, the date/time that the operation began, and a Cancel button.

Waiting. This status indicates that an operation is pending but has not yet been started. This can happen when the server is busy with other activities. Users with the proper security privileges are able to cancel waiting operations other than their own.

Canceled. This status indicates that an operation was canceled during (or before) completion and includes a time/date stamp and the user who canceled it.

Completed. The operation was completed and results are available; operators can open it, download the results, or send the results via email to whatever address they want—different from those specified in the Notification tab(s) of the Reports window.

| | |
|---|--|
|  | Email Operation. This opens the Send Email window, where you can email a link to download and view the operation file. Your Email Preferences must be configured for this option to be available. |
|  | Operation Information. Click this icon to view a summary file with information such as the selections and options set for this report, or details on what happened in the utility. |
|  | Download PDF Report. Click this icon to download your report as a PDF. |
|  | Download TXT File. Click this icon to download .txt files from Imports or Exports. |
|  | Download Misc File. Click this icon for other types of file downloads. |
|  | Download Results and Summary. Click this icon to download the results with the summary included as a cover page. |

Filter

Filter

Show by type

All types

From

Today

User / Site

My Operations

☐ Completed operations only

You can filter your operations by type, day, and user or site. The options in the drop down menus are shown below with the default selection highlighted.

Show by type

All types

Export

Import

Reports

Utility

System Reports

From

Today

Last 7 days

Last 30 days

30 - 60 days ago

60 - 90 days ago

User / Site

My Operations

All Operations

ALX - Alexandria Academy

COMP - COMPanion District Demo

EVE - Evelyn Elementary

MIA - Mia Middle School

Run Operations

Run Operations



Reports



Labels



Notices



Utilities



Export



Import

- [Reports](#) - Use our templates to customize and run a variety of reports, notices, and labels. This is where you set up overdue notices, and print lists of holds to process.
- [Labels](#) - Customize and save barcode and spine labels for your items, as well as patron labels and library cards.
- [Notices](#) - Customize and save the email and print notices that you send to your patrons.
- [Utilities](#) - Utilities can change large amounts of information at once. They allow you to modify, clear, or clean up required information, such as title or patron records, title/copy policies, patron histories, and all types of circulation transactions.
- [Export](#) - Exporting is the process of moving information out of Alexandria where it can be manipulated manually or used in other software applications. You choose the information you want to export, for patrons, items, and more.
- [Import](#) - There are times when you'll want to add information to Alexandria from outside sources, such as MARC records from book vendors, or patron information from a central database.

Actions Menu

By default, all operations older than 90 days are automatically removed from Operations Management.

- **Remove Operations.** Removes the selected operation(s). To select multiple operations, hold the <shift> key down while clicking on the operations you want to remove.
- **Repeat.** This takes the selected operation (i.e. report or utility) with the original parameters, places it in the queue, and schedules it to run again as soon as possible.



These actions are only available if your Operations Management security preference is set to **Manage All**. This preference is found on the [Tools > Security > Tools](#) tab.