Reports Workshop

> ⓘ new see https://support.goalexandria.com/operations/reports/#video

Frequently Asked Questions

Alexandria has a wide range of reports to both assist in getting the proper information to those that need it such as Overdue Lists and Notices, Patron and Item Details, Charges and Fines, Item Barcode Labels, Patron Library Cards, and other such things for the day to day running of a library.

See the Complete Reports List for more information.

After you select **Run**, click the wrench icon in the upper right corner of your screen. Once your report is complete, you will see your report ready to **Email** (letter icon), **View** (info icon), or **Download** (PDF document icon).

When it comes to finding reports in Alexandria most are clearly labeled, but you will want to get into the proper category (list on the left) to give you a smaller list to view. Though, to really find something quickly, I recommend using the search feature in the upper right hand corner.

Not at all. Any time you customize a report to perform a specific search, you can always click *Create Saved Report* to save your changes and make it easier to find in the future.

You probably used a quick report last time! Quick reports are used for running one-time reports and do not save selections. However, saved reports are frequently-used reports with saved selections and options that can be favorited, shared, and scheduled. If you want to save a report, select a report and click **Create Saved Report** at the bottom right-hand corner of the window.

1. In Reports > Patrons >Patron Barcode Labels (3x10), Options, you can adjust the size of the barcode labels. Make sure the row underneath is empty, and then select Large in the size dropdown.

Reports found under Collection Analysis can be used for this purpose. The entire collection value is included in the Brief Analysis report. You can also run the Super Summary report, which shows the entire collection values broken down by call number ranges. The Copy Information report (detailed option) shows the copy values and funding sources.

When you run reports in Alexandria the most common process will be to print off the paper copy or save a digital copy on your desktop. However, there are additional options for delivery in the case of features like the Email Notices option and the ability to have the PDF report sent directly to the person that requires the information.

Because Alexandria v7 is a web-based app with no local installation on your computer, all of the reports are created and generated on a separate server and need to be downloaded to your local computer to see them in full. We strongly recommend modifying your browser settings to automatically open any downloaded files, which will save you a mouse click after you've download it.

Currently, all reports in Alexandria are PDF only because the various template and layout requirements require more controlled formatting. You can, however, export information into a tab-delimited file that can then be opened in Excel and sent to whomever needs it.

In recent updates, we have adopted a new Operations engine. This allows Alexandria to give preferences to processes like Circulation, but means that reports and utilities may run a little slower.

See our Alignment Troubleshooting tips. Specifically, make sure your scaling is set to 100% or Actual Size in your PDF reader. Also, you'll want to make sure you're using the correct type of labels for the barcode report you're using.

Code 3 of 9 or code 39, with no check digit. See Barcode Your Collection for more information on barcodes.

This happens when the grade table and patron grade are not matching exactly. To get your patrons to show up on the report, you will need to change the grade table or the Patron grade to match.

Go to **Tools>Reports>Special>Unused Barcodes**. Under the **Options** tab, specify if you are running the report with the **Range Information**, **Barcode List**, or **Barcode Labels (3x10)** format. Read our Tip of the Week on Unused Barcodes, or refer to the documentation for additional details.

Use the **Copies added** selection to see copies your library attained at a certain point in time (enter the date range or relative date). Note that you are selecting the date you *want* to see, not the date you *don't want* to see. For example, to get a Weeding List of books your library has had more than 5 years, you would use the date range of March 1990 (or some earlier date) to March 2016.

Which reports can help me with end of year tasks?

- *Discarded Copies report*: See which copies have been discarded throughout the year and make sure the list is correct before permanently removing them with the *Remove Discarded Copies utility*.

- Copies Labels Reports: Create labels for new copies.

- Send patrons notices about their coming due items, overdue items, and charges:
  - *Coming Due Items Notice report*
  - *Overdue Items Notice report*
  - *Unpaid Charges Notice report*
  - *Overdue Items and Unpaid Charges Notice report*

Get a list of loaned items (including temporary items) along with their due dates with the *Loaned Items Information report*!

Turn on **Page Break on Major Sort** if you're sorting by level (grade) or location (homeroom) and using the *Detailed* or *Complete* formats. Then you won't need to run a separate report for each.

Go to **Reports > Saved**. Scheduled reports will have a calendar icon to the right. Select a report you want to pause, go to the **Scheduled** tab, and turn off **Schedule Report**. You may want to keep a list of these reports so you can remember to re-schedule them when school resumes.

Also see our instructions in the End-of-year prep—Disable emails tip if you have automatic email notifications turned on in **Circulation Preferences**.

Many reports were combined and streamlined in Version 7. See Reports Conversion for instructions on converting your saved reports.

Make sure that your Google account has two factor authentication turned off, and the "allow less secure apps" setting turned on. Note: Sometimes it takes a day for Google to allow access after changes are made.

Check Email Preferences to ensure you're using the correct settings.

We hope this answers some of you basic questions about reports. If you need any assistance, check out the Reports section in our Support Center, or contact our Customer Support Team at 800-347-4942 or support@companioncorp.com.