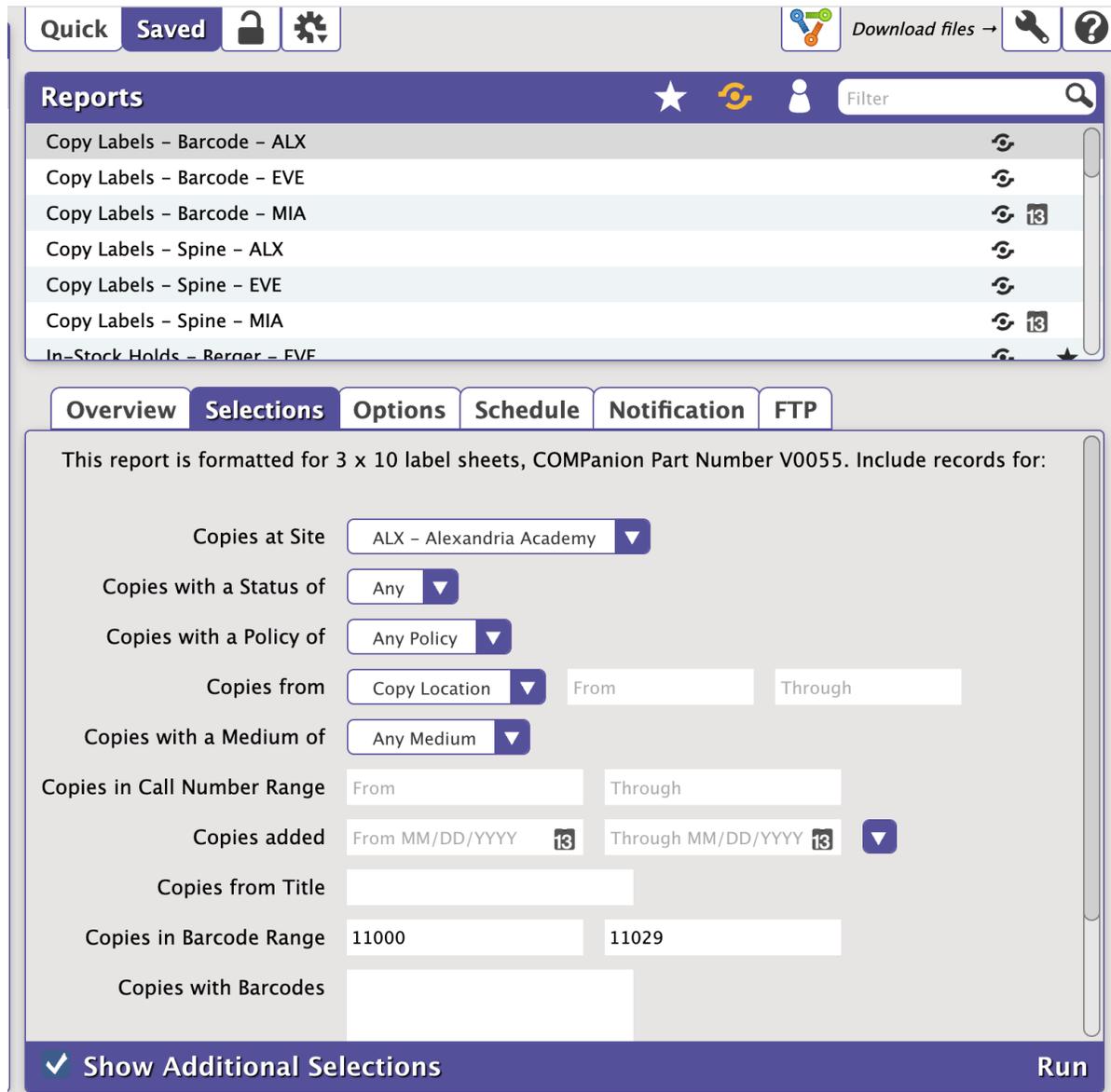


How to share your district report standards

January 23, 2023

Does your district require certain report standards or label formats? You can use Alexandria's feature to save and share reports with your district to keep all the librarians on the same page.



The screenshot shows the Alexandria Reports interface. At the top, there are tabs for 'Quick' and 'Saved', along with icons for a lock, settings, and a 'Download files' button. Below this is a 'Reports' section with a list of reports: 'Copy Labels - Barcode - ALX', 'Copy Labels - Barcode - EVE', 'Copy Labels - Barcode - MIA', 'Copy Labels - Spine - ALX', 'Copy Labels - Spine - EVE', 'Copy Labels - Spine - MIA', and 'In-Stock Holds - Berner - EVE'. Each report has a share icon and a '13' badge. Below the list are tabs for 'Overview', 'Selections', 'Options', 'Schedule', 'Notification', and 'FTP'. The 'Selections' tab is active, showing a configuration screen for a report. The text reads: 'This report is formatted for 3 x 10 label sheets, COMPAnion Part Number V0055. Include records for:'. Below this are several dropdown menus and input fields: 'Copies at Site' (ALX - Alexandria Academy), 'Copies with a Status of' (Any), 'Copies with a Policy of' (Any Policy), 'Copies from' (Copy Location), 'Copies with a Medium of' (Any Medium), 'Copies in Call Number Range' (From and Through), 'Copies added' (From MM/DD/YYYY 13 Through MM/DD/YYYY 13), 'Copies from Title', 'Copies in Barcode Range' (11000 and 11029), and 'Copies with Barcodes'. At the bottom, there is a 'Show Additional Selections' checkbox and a 'Run' button.

How to – The District Level

As a district librarian, go to Reports, and log in to your [Union Site](#).

1. Find the report you need, e.g. Copy Labels 3x10.
2. Set the report up how the majority of your librarians will use it, with the data laid out in specific rows based on the standards of your district.
3. Click the button to **Create Saved Report**, and give it a descriptive name. You may want to include the word 'District' in the name to help your librarians identify it and include a date so they know they're using the latest version—like "Labels for New Copies - DISTRICT STANDARD 20230127."
4. In the saved report, go to the Overview tab. Check the box to SHARE this report, and then save it.



That's it! Now the standard is set.

How to – The Librarian Level

Depending on how everything is set up you might be able to find that report and run it directly as is. However, in the example above, that's unlikely, because the librarians in the middle school don't need to be printing labels for the books added at the elementary school. You will need to alter the selections to grab the copies added on a particular date and/or to a particular site. So here's what to do:

1. Log in to your site and go to Reports.
2. Click on the Saved tab. Then, click the little  'golden snitch' icon (or is it a pokeball?) to show all saved reports.
3. Find and select the one with the correct name (DISTRICT STANDARD 20230127).
4. Use the Actions Menu  and Duplicate that report, modifying the name to include that it's for your site, e.g. "Labels for New Copies - AMS."
5. In the Overview tab, you can choose whether to keep sharing this report or not. Depending on your District standards:
 - Sharing is great for the district-level librarian to double check that the report is following the District standards.
 - Or if the saved list is getting cluttered, it can be unshared and librarians can check periodically that they are using the latest version by comparing the dates in the report titles.
6. In the Selections tab, you can change any selections to pick the records needed (note: don't forget to unlock the saved report first). The most obvious selections will be the Copies from Site, (or Patrons, Titles, etc) dropdown, which you will need to change to your site.
7. Then, Save the report.

In this example, whenever a site gets new copies, you can go to this saved report, fill out the "Copies Added" selection to cover the new copies added, and print labels for those items that follow your district standards.

As always, feel free to contact our amazing support team at 1-800-347-4942 for any help!



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