

# Utilities

## Operations

### Utilities

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Coming soon, **Utilities** will be accessed through **Operations** in the sidenav. [Learn more about the Alexandria Dream Makeover!](#)

## 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.

Quick utilities are meant to be run once and then the settings are discarded. Create a saved utility if you intend to run that particular utility again, then you won't need to adjust the settings next time. 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.

Take some time to explore the categories and subcategories and set up some Saved utilities for which you'll be able to easily access and run in the future.



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**. Before running a utility, you should run a **report** with the same selection criteria to see which data would be changed with the utility.

# Utilities

Last Updated: 5/2/2018

The screenshot shows the 'Utilities' interface. On the left is a 'Categories' sidebar with a tree view: 'All Utilities', 'Patrons' (expanded), 'General', 'Lexile', 'Reviews', 'Titles', 'Copies', 'Circulation', 'Periodicals', and 'Database'. The main area has 'Quick' and 'Saved' tabs. The 'Utilities' list shows items like 'Add Patron Notes', 'Advance Patron Grade', 'Change Patron 2nd Location', 'Change Patron Grade', 'Change Patron Homeroom', 'Change Patron Policy', and 'Change Patron Security Group'. Below this is a 'Selections' and 'Options' configuration panel. The 'Options' tab is active, showing a text box for 'Add note for:' and several filter fields: 'Patrons at Site' (AMS - Adams Middle School), 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Patron (\$)), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Homeroom) with 'From' and 'Through' date fields, 'Patrons in Grade' with 'From' and 'Through' date fields, and 'Patrons added' with 'From' and 'Through' date fields. At the bottom are buttons for 'Show Additional Selections', 'Create Saved Utility', and 'Run'.

## 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.



Broken image

**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.

## 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.
- **Patrons** utilities allow you to remove groups of patrons, change patron policies, renew expired cards, or advance patron grades.
- **Titles** utilities allow you add, modify, and remove information for any number of titles in your collection.
- **Copies** 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.
- **Periodicals** utilities are used to remove select route and subscription information.
- The **Database** utility is used to create a copy of your data.

## 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 (utilities saved by you). Read more about filters in [Saved Utilities](#).

Scroll through the list to locate and select the specific utility you'd like to view, modify, or run.

## 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.

### Quick Utilities

The screenshot shows the 'Quick Utilities' pane with the 'Selections' tab selected. The pane has a light blue header with 'Selections' and 'Options' tabs. Below the header, there is a text area for a note. The main area contains several filter options: 'Patrons at Site' (AMS - Adams Middle School), 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Patron (5)), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Homeroom), 'Patrons in Grade' (From/Through), and 'Patrons added' (From/Through). At the bottom, there are three buttons: 'Show Additional Selections', 'Create Saved Utility', and 'Run'.

### Saved Utilities

The screenshot shows the 'Saved Utilities' pane with the 'Selections' tab selected. The pane has a light blue header with 'Overview', 'Selections', 'Options', 'Schedule', and 'Notification' tabs. Below the header, there is a text area for a note. The main area contains several filter options: 'Patrons at Site' (AMS - Adams Middle School), 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Patron (5)), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Homeroom), 'Patrons in Grade' (From/Through), and 'Patrons added' (From/Through). At the bottom, there are three buttons: 'Show Additional Selections', 'Run', and 'Run'.

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 the Operations Management queue. The utility will be documented in the Show My Operations log in Operation Management.