

Saved Exports

Operations

Export

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About

 this page and all its tabs has been moved to <https://support.goalexandria.com/operations/export/>

 [Tools](#) > [Export](#) > [Saved tab](#)

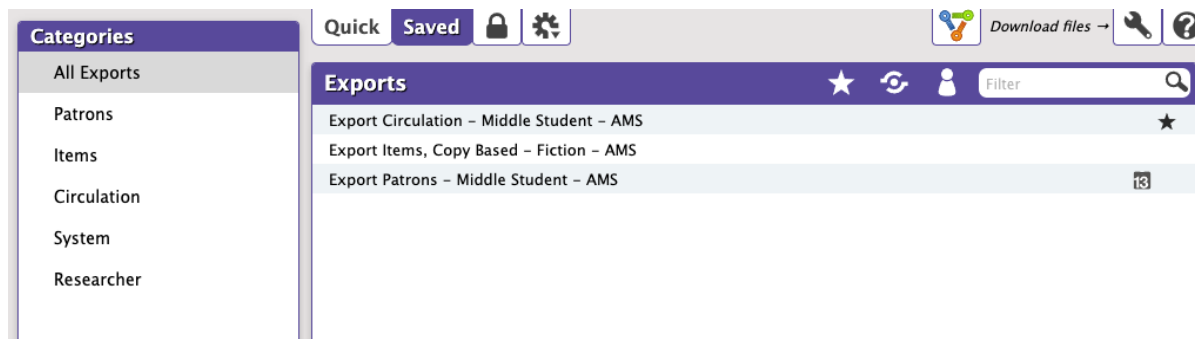
Saved Exports

Saved Exports

Alexandria makes it easy to build your own frequently-used, custom exports. The Saved tab contains custom exports that you (or others) have created, saved, and shared. Keep in mind that saved exports only retain the selection criteria used to create the export, not the results of the export itself.

Select an export from the Export Selection pane to populate the Selected Export pane below. Saved exports tabs—Overview, Selections, Options, Notification, Schedule, and FTP—contain settings that are essential to how your exports are ordered, organized, and presented.

Saved exports can then be run, modified, duplicated, or removed.



Categories

Exports are organized in categories in a list on the left side of the window. Select a category to view the list of associated exports in the Export Selection pane to the right.

- **All Exports.** This category contains all the available export types.
- **Patrons.** These allow you to export records for all (or a specified group) of patrons.
- **Items.** Title- and copy-based exports allow you to archive your item information, create catalogs for selected items, or modify item information using applications outside of Alexandria.
- **Circulation.** These allow you to export miscellaneous circulation-based data not covered by the other export types.



Remember, the list of available exports depends on both the category you've selected *and* whether you're in the Quick or Saved tab.

Export Selection

Once you've selected a category, the associated exports will be listed in the Exports Selection pane on the right. Scroll through the list to locate and select the specific export you would like to view, modify, or run. You can search for a specific title in the filter bar and further narrow the list of exports by Favorites, Shared, and Operator (exports saved by you).

Remember, the exports that appear in the Export Selection pane directly relate to the category you've selected and the term(s) you've entered in the search filter.

Once you've selected a category, the associated exports will be listed in the Exports Selection pane on the right. You can further narrow your the exports using filters. In some ways, these filters far surpass the usefulness of the Categories pane. In fact, you may find yourself never using the Categories filters again, preferring instead to use the All Exports category in conjunction with the filter bar.

-  **Favorite.** See the exports marked as Favorite.
-  **Shared.** See the exports marked as Shared.
-  **Operator.** See the exports that you (the current operator) have saved.
-  **Filter.** Enter a term to filter the exports by title.

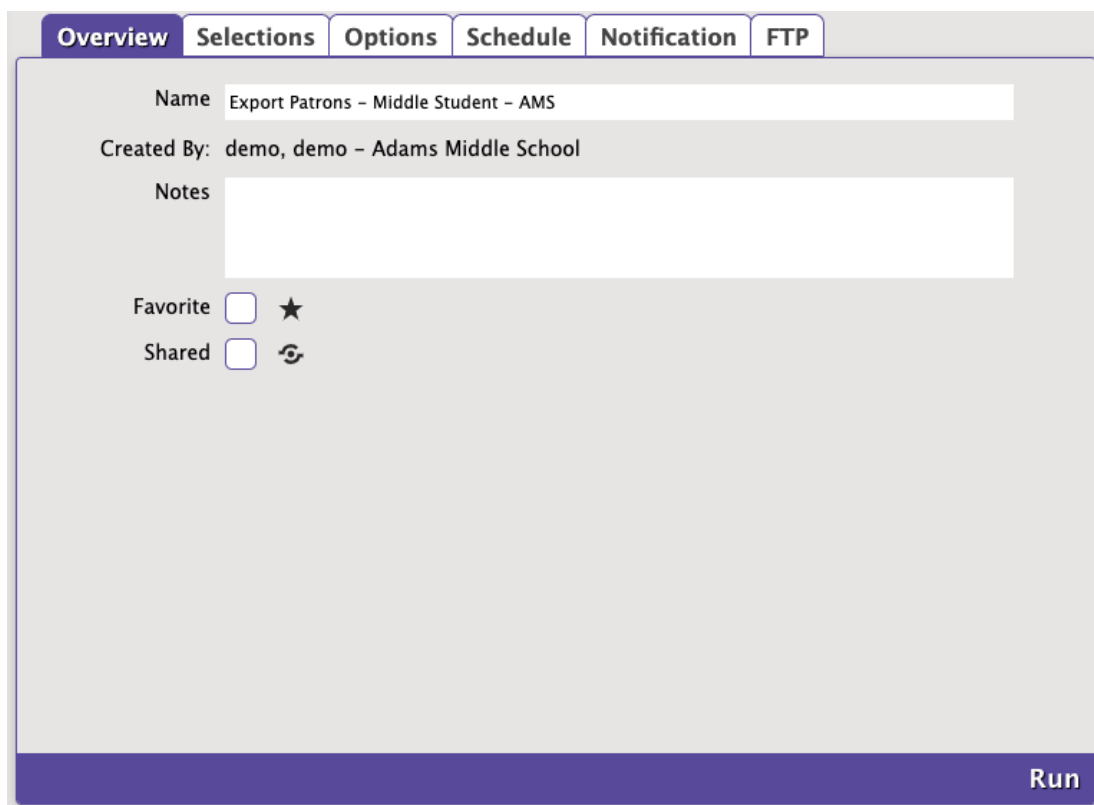
Once you've sufficiently narrowed your filter criteria, scroll through the Export Selection list to locate and select the specific export you would like to view, modify, or run. The export will populate in the tabs below. To edit the record, click the padlock icon to unlock it, then modify the data in each tab per your specifications, and click **Save** when you're done. Click **Run** to run the export.

Overview

Overview

 [Tools](#) > [Export](#) > [Saved tab](#)

The Overview tab serves as an export summary. It includes the title (e.g. *Export Unpaid Fines*), export creator, usage notes (e.g. *Run at the end of each month to import into our money management software.*), and allows you to mark it as a favorite or shared.



The screenshot shows the 'Overview' tab of an export management interface. At the top, there are six tabs: 'Overview' (selected), 'Selections', 'Options', 'Schedule', 'Notification', and 'FTP'. Below the tabs, the 'Name' field contains 'Export Patrons – Middle Student – AMS'. The 'Created By' field shows 'demo, demo – Adams Middle School'. The 'Notes' field is empty. There are two checkboxes: 'Favorite' with a star icon and 'Shared' with a share icon. A 'Run' button is located at the bottom right of the form.

Settings

Name

Enter or edit the name of the export here (e.g. *Export Unpaid Fines*).

Created By

This information is automatically populated with the creator's name and site ID code.

Notes

You can provide general usage notes here.

Favorite

Mark the export as a favorite. You can filter the results in the Export Selection pane to show only those marked as Favorite, which is especially helpful if you find yourself running the same exports regularly.

Shared

Mark the export as shared. You can filter the results in the Export Selection pane to show only those marked as Shared. Sharing frequently-used exports with other operators is often helpful when particular exports are frequently performed.

Selections

Selections

 [Tools](#) > [Export](#) > [Saved tab](#)

The Selections tab is where you build, format, arrange, limit and/or expand the export to suit your needs. If you find some of your exports lacking the necessary selection information, try checking the **Show Additional Selections** box for more options. The settings in this tab vary per export.

Overview

Selections

Options

Schedule

Notification

FTP

Include Records for:

Patrons with a Status of

Active

Patrons in Security Group

Any Group

Patrons with a Policy of

Middle Student

Patrons from

Location

 From Through

Patrons in Grade From Through

Patrons added From MM/DD/YYYY Through MM/DD/YYYY

Patrons modified From MM/DD/YYYY Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range From Through

Patrons with Barcodes

✓

Show Additional Selections

Run

Options

 Tools > Export > Saved tab

Choose sort and format options here. The settings in this tab vary per export.

Overview

Selections

Options

Schedule

Notification

FTP

Sort Patrons by

Last Name

Select Fields

Header ☒ Alexandria Header (e.g. ###*PT01/1000/1001)

☐ Field Names (e.g. First Name, Last Name)

☐ None

Run

Schedule

Schedule

 [Tools > Export > Saved tab](#)


Use these settings to schedule this export to run on a regular basis. For example, if you want it to run every Saturday at 10:00 p.m, set the following:

- **Frequency:** Weekly
- **On:** Saturday
- **At:** 10:00 PM



The scheduled time is the time the export is added to your [Operations queue](#). Depending on how busy your queue is, the export may or may not be complete at that exact time.

OverviewSelectionsOptionsScheduleNotificationFTP

☒ Schedule Export 

Frequency

Daily

At

4

 :

10

AM

Run

Settings

Schedule

Check this box to unlock the scheduling capabilities.

Frequency

This dropdown menu allows you to specify how often you would like to repeat this export: Once, Daily, Weekly, Monthly, or Yearly.

On

The options here depend on the frequency you selected above.

Once. Choose the date to run this export.

Daily. On options are not necessary.

Weekly. Choose the day the export will run each week.

Monthly. Choose the date the export will run each month.

Yearly. Choose the month and date the export will run each year.

At

Choose the time of day, including a.m. or p.m., to run the export.

Notification

Notification



Tools > Export > Saved tab

Here you can enable an email confirmation and link to download the file to be sent to the recipient(s) of your choice once the export is complete.

OverviewSelectionsOptionsScheduleNotificationFTP

If you want confirmation that your exports 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 and Download Link To** field will be sent confirmation, a link to the Summary Report, *and* a link to download the export file; those in the **Email Notification To** field will be sent confirmation that the export was performed and a link to the Summary Report.

☒ **Enable Email Notification**

Email Notification and Download Link To

Email Notification To

Run

Settings

Enable Email Notification

Check this box if you want to enable email notifications to be sent upon completion.

Email Notification To

Enter the recipient email addresses. You can provide more than one email address separated by commas.

- For example: *john.doe@examplelibrary.com,jane.doe@examplelibrary.com*

FTP

FTP

Textbook Tracker can save finished exports to an FTP server. These options allow you to specify the (secure) FTP server address and username /password credentials.

Overview

Selections

Options

Schedule

Notification

FTP

Alexandria can export patron or item records to an FTP server. These options allow you to specify the (secure) FTP server address and username/password credentials.

☒ Upload Export to FTP Server

Protocol

FTP

Test FTP Connection

Host

Port

21

Path

Username

demo

Password

....

Run