Export

Export

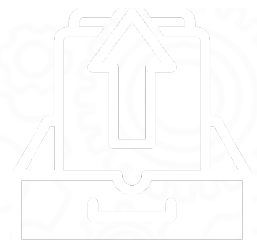**How helpful was this page?**

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Exports window

> ⚠ This page has been moved to https://support.goalexandria.com/operations/export/

Export

Exporting is the process of moving information out of Alexandria and preparing it for use in other software applications. With our general templates, you choose the information you want to export, whether it be for all—or a specified group—of patrons, items, and more.

Export

Exporting item and patron records does not affect the data that exists in your Alexandria database. Only a copy of that information is exported; the original record remains intact. You can export copy, title, patron, and other records from Alexandria in MARC, MircoLIF and Tab Delimited formats.

Take some time to explore categories and set up a few Saved exports to easily access and run in the future.
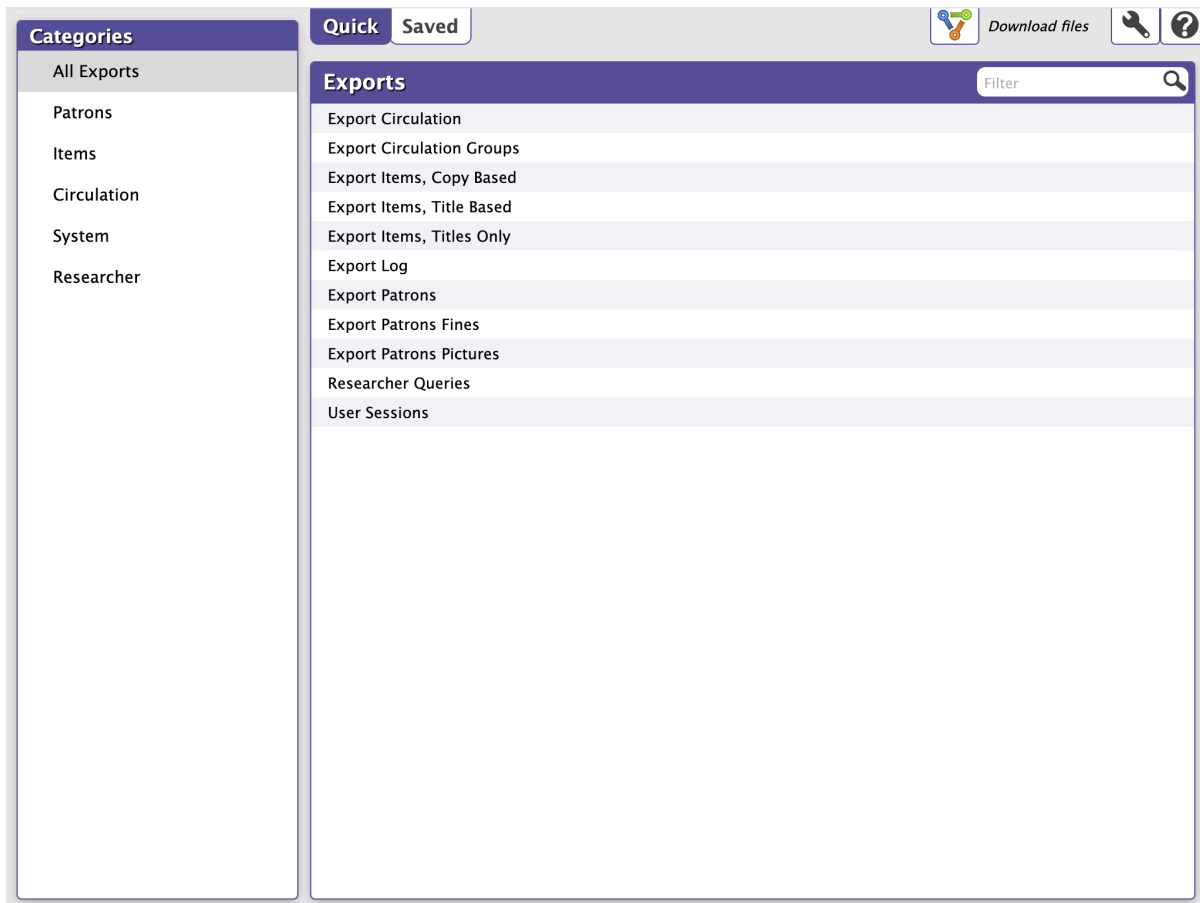
Interface

The Exports interface may look complicated at first glance, but it was designed with simplicity in mind—placing everything in an easily navigable window that allows you to quickly find, modify, and perform exports. Additionally, the Exports interface allows you to create exports that only include pertinent information: patron fines, circulation groups, patrons, and items. You can also schedule exports and deliver their output via email, FTP, etc.

To become an export wizard, there are only three essential things you need to understand: export categories, export templates, and creating custom exports.

The Exports interface uses the familiar three-panel layout found in most Alexandria management interfaces.

- The **Categories** pane is on the left-hand side of the window. It contains a list of all existing export categories (e.g. Patrons). Selections from this pane act as filters, allowing you to narrow your focus and display only relevant exports.

- The **Quick** and **Saved** tabs are in the upper-right section of the window.

- In a Central Union, click the 🔧 **Switch Site** icon in the top-right corner to change the site you're working in.

- The **Exports Selection** pane is the main section near the top. It allows you to select the specific export you would like to view, modify, or perform. If you haven't yet selected an export from this pane, you will be presented with a longer list; the Selected Export pane for Quick /Saved exports only appears after an export is selected from this list.

- The **Selected Export** pane, the bottom-right window, contains settings and options for the selected export in various tabs. The tabs, fields, and options change depending on the export you've selected in the Export Selection pane and whether you're on the Quick or Saved tab.

Categories	Quick Saved	Download files 🔧 ❓
All Exports	**Exports**	Filter 🔍
Patrons	Export Circulation	
Items	Export Circulation Groups	
Circulation	Export Items, Copy Based	
System	Export Items, Title Based	
Researcher	Export Items, Titles Only	
	Export Log	
	Export Patrons	
	Export Patrons Fines	
	Export Patrons Pictures	
	Researcher Queries	
	User Sessions	

Categories Pane

The first step in performing an export is picking the proper category. The Categories pane on the left-hand side of the window is a collection of categories that can reduce the number of results that appear in the Export Selection pane (i.e. the Quick and Saved tabs) on the right.

Selecting (highlighting) one of the main category names (e.g. Items) will reveal all of the exports available for that category. For example, if you want to export all patrons with a certain policy, you can't do it with the Circulation category selected—they're Patrons (category) exports. Selecting All Exports at the top of the categories filter will populate the Quick and Saved tabs with all available export options.

- **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 Alexandria.
- **Circulation**. These allow you to export miscellaneous circulation-based data not covered by the other export types.

Export Selections Pane

The larger, right-side of the Export interface is dedicated to the currently selected export and contains all of the export's configurable settings and options.

Directly below the control strip is the Export Selection pane. This pane changes dynamically depending on whether you have the Quick or Saved selected. Remember, the exports that appear in the Export Selection pane directly relate to the category selected from the Categories pane and/or the information that is entered into the Filter bar.

The Filter bar, in conjunction with the Categories pane, can be used to further filter the results of the Export Selection pane. In some ways, this is the consummate export filter—far surpassing the Categories pane. In fact, you may find yourself never using the Categories filters again, preferring instead to check against All Exports using the Filter bar.

For example, if you select Patrons from the Categories pane and then type "fines" in the Filter bar, you would only see fine-related exports in the Export Selection pane. If you have All Exports selected from the Categories pane and type "fines" into the Filter bar, you would see results matching all fine exports.

The results of the Filter bar depend on whether you have the Quick or Saved tab selected and what category filter is being applied.

If you would like to search the entire collection of exports you will first need to select All Exports from the Categories pane and then provide a term in the Filter bar. For instance, if you're looking for a simple Export Items, Copy Based export and don't want to bother with the category filters, simply select All Exports and start typing "Copy" in the Filter bar.