Operations

Operations

- Reports
- Labels
- Notices
- Utilities
- Export
- Import

Related Blog Posts

Blog Posts

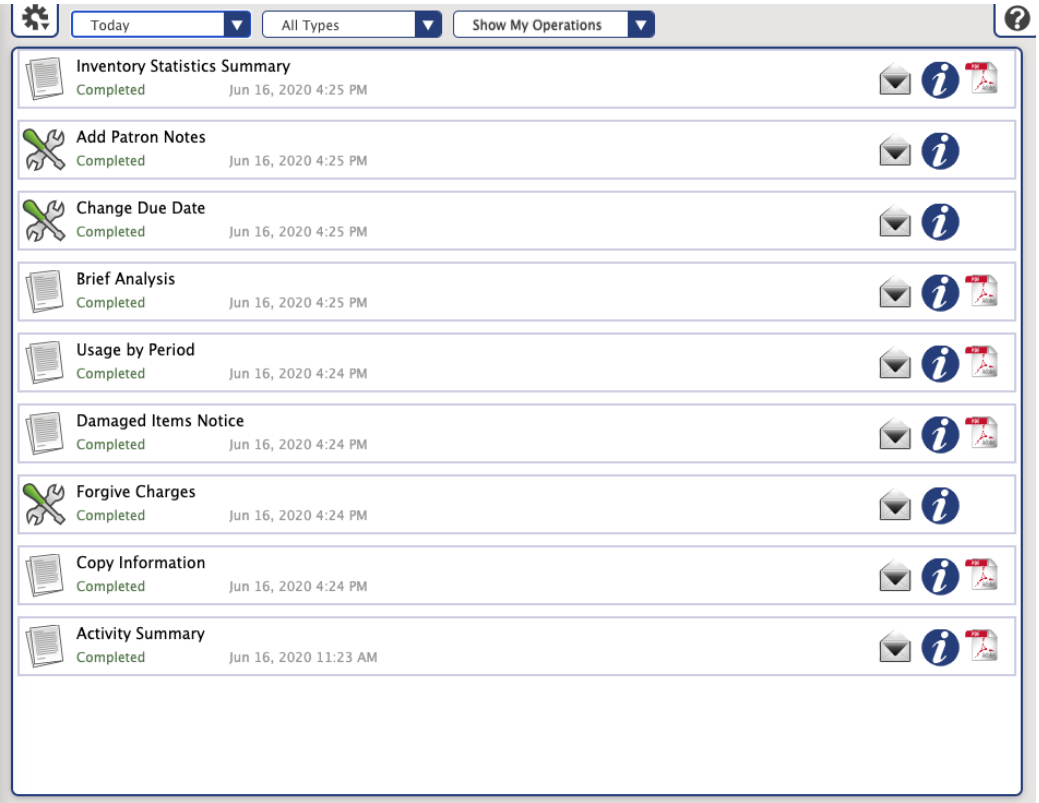
- Blog: Winter storms–recompute due dates created by Bethany Brown Jan 23, 2024 Alexandria
- Blog: How to add reports in the new beta–you beta be trying it! created by Bethany Brown Jan 16, 2024 Alexandria
- Blog: Remind me with reports... for notes! created by Bethany Brown Oct 04, 2023 Alexandria
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Save as PDF

Content

- Reports
- Labels
- Notices
- Utilities
- Export
- Import

The Operations Management window automatically orders/sorts all pending operations (i.e. reports, utilities, imports, or exports) and allows you to view summaries and open, email, or save operations that you (or others) have previously completed. Simply think of Operations Management as a nerve center that consolidates all operations that you, the current user, the system, and/or others (depending on your security permissions), have been performing; in essence, a specialized transaction log for past and future operations. Once a report, utility, import, or export has been initiated, you can open Operations Management to track the progress of the current operation and allowing you to view (or save) previously completed operations. Completed operations shown in the “queue” include the name and status of the operation and are affixed with a time/date stamp. An operation that is currently running provides a Cancel option.



Each time Operations Management is opened, the Date Range drop-down filter defaults to Today; in other words, only the current user's newest (i.e. today) operations are initially visible in the Operations Management queue. Each operation is ordered chronologically from newest-to-oldest, so you can see if there are any operations scheduled ahead of yours. The Operation Type dropdown filer defaults to All Operations, which includes pending (or completed) automatic system operations like the Daily Operations system utility (which clears expired holds, reservations, and overdue items that were declared “lost”).

For reasons of accountability and transparency, Operations Management will retain all information for canceled and completed operations for a week at least; operations older than a week can be removed from the queue by choosing one of the Remove older than XX days selections from Operations Management's Actions menu. Your security privileges (i.e. Remove All) determine whether a particular user has the ability to remove canceled or completed operations from the queue. By default, all operations older than 90 days are automatically removed from Operations Management.

Unknown macro: 'multiexcerpt-macro' Unknown macro: 'multiexcerpt-macro'

Operations Controls

Last Updated: $action.dateFormatter.formatDateTime($content.getLastModificationDate())

The controls at the top of the interface allow you to filter your results.



Actions Menu

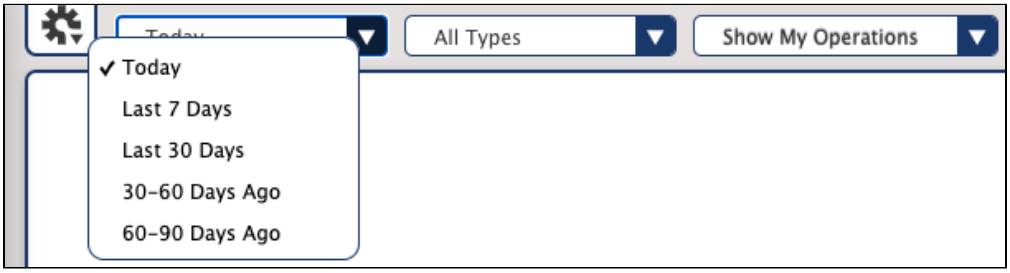


By default, all operations older than 90 days are automatically removed from Operations Management.

- **Remove Selected Operations.** Removes multiple operations at once. To select multiple operations, hold the <shift> key down while clicking on the operations you want to remove.
- **Remove older than 7 days**
- **Remove older than 14 days**
- **Remove older than 30 days**
- **Remove older than 60 days**
- **Repeat.** This takes the selected operation (i.e. report or utility) with the original parameters, places it in the queue, and schedules it to run again as soon as possible.

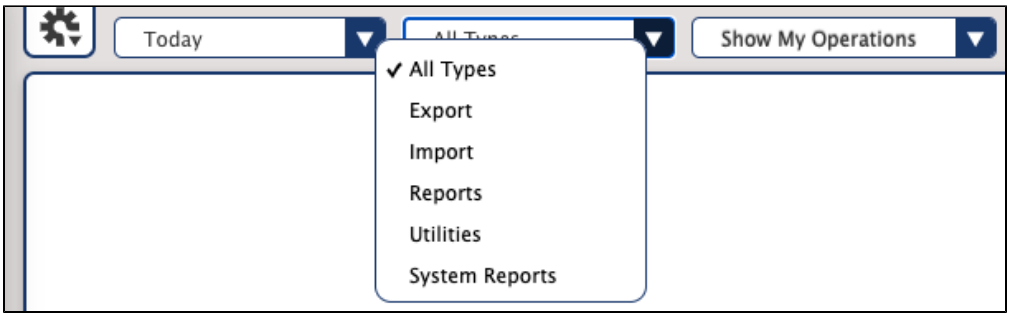
These actions are only available if your Operations Management security preference is set to **Manage All**. This preference is found on the **Preferences > Security > Tools** tab.

Date Range Filters



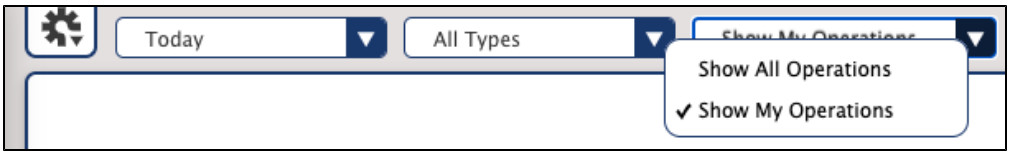
- **Today**
- **Last 7 Days**
- **Last 30 Days**
- **30-60 Days Ago**
- **60-90 Days Ago**

Operation Type Filters



- **All Types**
- **Export**
- **Import**
- **Reports**
- **Utilities**
- **System Reports**

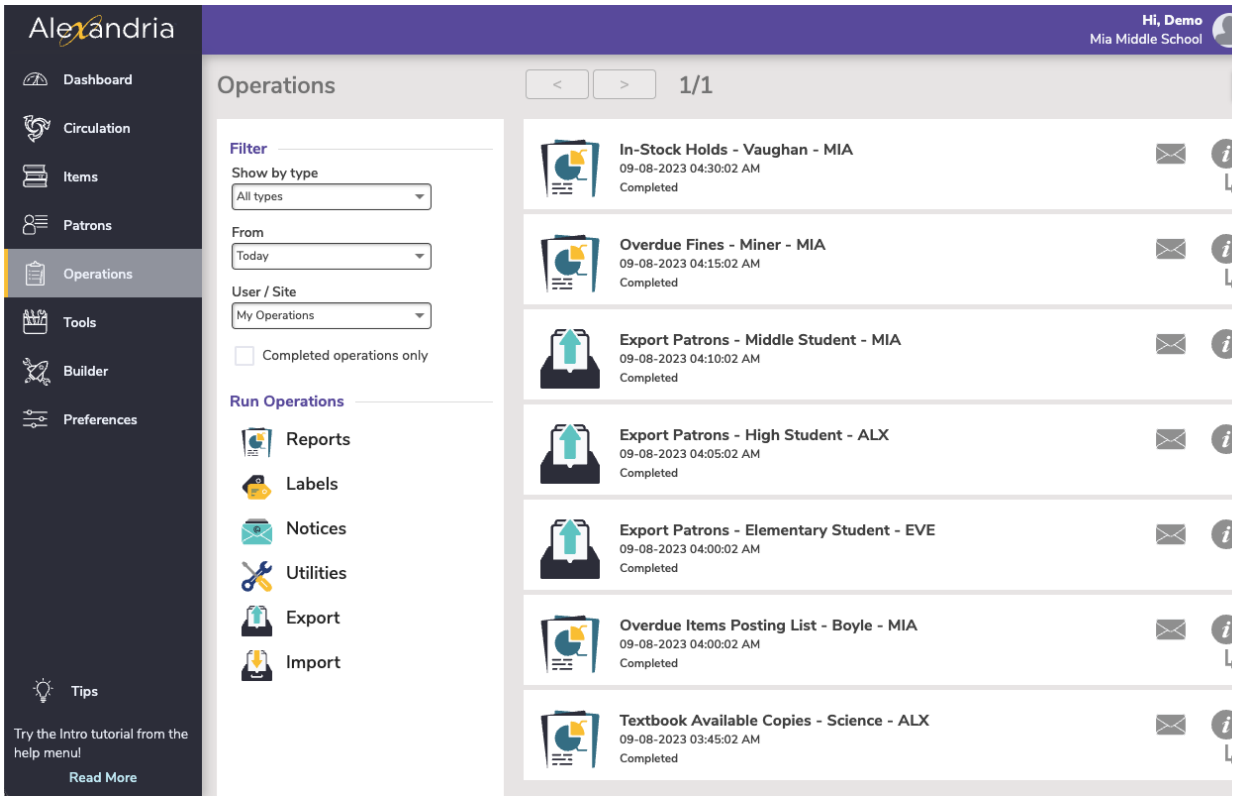
Operator Filters



- **Show My Operations**
- **Show All Operations**

This page has been moved over to https://support.goalexandria.com/operations/

Operations is where you access **Reports**, **Utilities**, **Exports**, and **Imports**, and contains the feed of recent operations for you to email, view, and download. Operations is a transaction log for past and future operations.



Completed operations shown in the queue include the name and status of the operation, and the time/date they were initiated. Some operations (reports, exports) that are currently running provide a **Cancel** button.

The status of an operation can be one of four things:

Running. This status shows the operation currently being performed; it provides the progress of the operation, the date/time that the operation began, and a Cancel button.
Waiting. This status indicates that an operation is pending but has not yet been started. This can happen when the server is busy with other activities. Users with the proper security privileges are able to cancel waiting operations other than their own.
Canceled. This status indicates that an operation was canceled during (or before) completion and includes a time/date stamp and the user who canceled it.
Completed. The operation was completed and results are available; operators can open it, download the results, or send the results via email to whatever address they want—different from those specified in the Notification tab(s) of the Reports window.

	**Email Operation.** This opens the Send Email window, where you can email a link to download and view the operation file. Your Email Preferences must be configured for this option to be available.
	**Operation Information.** Click this icon to view a summary file with information such as the selections and options set for this report, or details on what happened in the utility.
	**Download PDF Report.** Click this icon to download your report as a PDF.
	**Download TXT File.** Click this icon to download .txt files from Imports or Exports.
	**Download Misc File.** Click this icon for other types of file downloads.

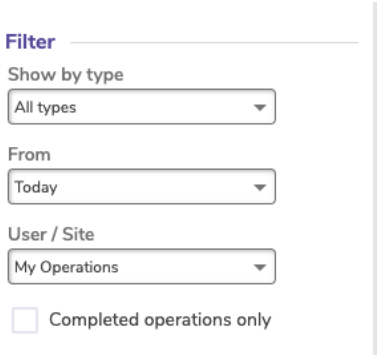
	**Download Results and Summary.** Click this icon to download the results with the summary included as a cover page.

Daily Operations

Every day, our software runs certain chores that clean up the system by removing things like expired holds/in-stock holds, setting Union Site copies to In Processing, looking for cover art, updating fines, and so on. At the end of each Daily Operations cycle, Alexandria will archive the operations to the log and deliver the results to Operations.

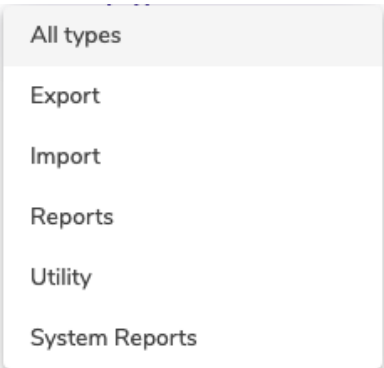
Daily Operations and other system activities can be viewed by all operators, but only some users have the security privileges (i.e. Manage All) to remove them.

Filter

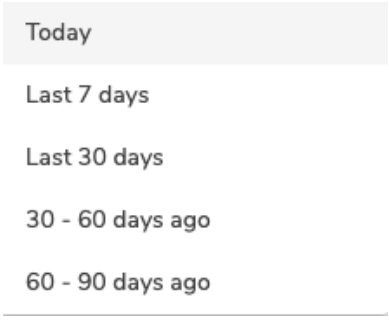


You can filter your operations by type, day, and user or site. The options in the drop down menus are shown below with the default selection highlighted.

Show by type



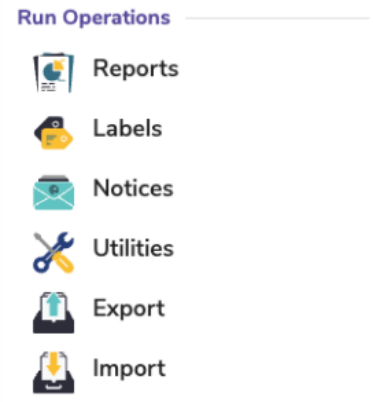
From



User / Site



Run Operations

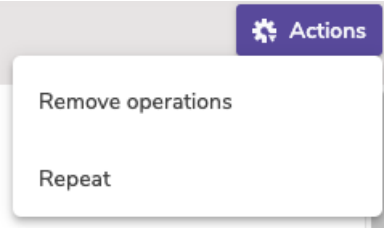


- Reports - Use our templates to customize and run a variety of reports, notices, and labels. This is where you set up overdue notices, and print lists of holds to process.
- Labels - Customize and save barcode and spine labels for your items, as well as patron labels and library cards.
- Notices - Customize and save the email and print notices that you send to your patrons.
- Utilities - Utilities can change large amounts of information at once. They allow you to modify, clear, or clean up required information, such as title or patron records, title/copy policies, patron histories, and all types of circulation transactions.
- Export - Exporting is the process of moving information out of Alexandria where it can be manipulated manually or used in other software applications. You choose the information you want to export, for patrons, items, and more.
- Import - There are times when you'll want to add information to Alexandria from outside sources, such as MARC records from book vendors, or patron information from a central database.

Actions Menu

By default, all operations older than 90 days are automatically removed from Operations Management.

- **Remove Operations.** Removes the selected operation(s). To select multiple operations, hold the <shift> key down while clicking on the operations you want to remove.



- **Repeat.** This takes the selected operation (i.e. report or utility) with the original parameters, places it in the queue, and schedules it to run again as soon as possible.

These actions are only available if your Operations Management security preference is set to **Manage All**. This preference is found on the **Tools > Security > Tools** tab.