

Alexandria[®]

BASIC TRAINING GUIDE

VERSION 7



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INTRODUCTION

The Alexandria Basic Training Guide contains specific and basic subject material that supports the Alexandria Basic Training part number. This guide is to be used as a reference tool to supplement the instruction provided by the Alexandria Training Coach and is not designed to provide further technical details.

The Alexandria Basic Training Guide communicates the basic understanding of Alexandria's primary functions, namely **Patrons, Items, Circulation, Tools, and Researcher**. Within each section, an overview of basic "how-to's" will be covered.

It is not the purpose of this document to prove as a complete manual or to replace the current Support Center resources available to all Alexandria customers.

For your convenience, links to the Support Center have been provided throughout this training document. Simply click a link for complete details on that particular topic.

HELP & SUPPORT

1 BEST PRACTICES

A. BACKUP, BACKUP, BACKUP

A backup is a copy of your Archive folder that is saved to an external medium such as an external hard drive, flash drive, network file server, or a backup service on the cloud. You should perform at least one backup any day your data is modified. We never discourage customers from keeping additional backups. If you are using the same drive to store all the backups, remember to rename each saved data folder to include the date (e.g. Jan012018Data, or 04292018Data).

You do not need to backup the *software*. COMPanion can quickly replace the software if it ever becomes corrupted as long as your site is current on its support subscription. What COMPanion *cannot* replace is your data—so BACK IT UP!

It is strongly recommended that at least one copy of your data be stored off-site (e.g. take the Friday backup home). Libraries have been burglarized and all computer equipment including the backup discs have been stolen. Libraries have also burned down and the backups have been instrumental in obtaining a quick settlement from the insurance company.

Central Catalog: Only one person needs to do the backup.

Note: Cloud-Hosted service is the recommended method for all Alexandria users. By using our Cloud-Hosted service you allow Alexandria to manage all of your data, updates, backups, and maintenance. Not only does this reduce the amount of expensive hardware and software your library will need to maintain servers, but it frees your time to focus on what you do best.

B. AUTOMATIC ARCHIVES AND DATABASE MANAGEMENT

The major difference between a Backup and an Archive is that a Backup is made from the Archive data and placed on removable media that can be physically stored away from the library.

Archiving is something Alexandria does automatically for you. It's an automatic method of saving your database before you perform large changes (e.g. importing, updates, utilities, or machine upgrades). It can be used to restore data that has been lost.

Database Maintenance occurs so the program verifies the integrity of your data and performs the actions necessary to follow the Preferences and Policies you have set.

C. ENABLE SECURITY


The Alexandria program comes with security already activated. Alexandria operators must be entered in the **Patrons** module and assigned to a **Security Group** that enables them to perform the functions within Alexandria that are necessary for the operation of the library. First, let's discuss setting the security group appropriately for your different types of operators.

To customize the permissions granted to a Security Group:

- Click the **Tools** module from the Alexandria Librarian interface, select **Preferences**, and click on **Security** in the **Configuration** category.
- Click on the **Security Group** you wish to customize.
- Using the dropdown menus on all tabs, consider the options given and grant permissions as you wish for operators assigned to the chosen security group. The permissions listed in each dropdown menu are hierarchal, meaning the permissions listed above the selected permission will also be granted.

When finished, click on **Save** in the upper-right corner of the window.

To add an operator:

- Click on the **Patrons** module from Alexandria Librarian.
- Click on the **Add (+)** at the bottom of the left frame if you are adding the person. If the person is already in the system, search for the patron using the **Find** icon .
- Use the **Security Group** drop down menu to select the appropriate security group. Click on **Save**.

2 SUPPORT CENTER

Alexandria provides built in **Help** documents. These can be accessed in either of two ways. In the upper right corner of each Alexandria module you will see **Help ?**. If you click on this icon, it will open the help document associated with that window in the *Alexandria Support Center* website. The second method is to search all the help documents.



To view the Support Center:

Go to <http://support.companioncorp.com/display/ALEX>

3 MESSAGE CENTER

Alexandria's **Message Center** allows you to receive notifications from COMPanion. These notifications contain update notices or information from COMPanion or COMPanion-sanctioned third parties and will vary depending on what features you are licensed to use. The **Message Center** comprises a single list, with COMPanion messages shown first.

To view the Message Center:

Click on the **Message Center**  icon to open the **Message Center** and display a list of your notifications; when you have unread notifications or new messages are available, a red dot appears on the Message Center icon . Alexandria checks for new messages during *Daily Chores*.

4 TIP OF THE WEEK

Tip of the Week features a new tip for using Alexandria each week. The **Tip of the Week** archives are a collection of past tips that can help you run Alexandria more smoothly. You may view them periodically by email or at a time of your choosing by visiting

To receive the weekly Tip of the Week emails:

Go to Alexandria's Support Center page for **Tip of the Week** and click **Sign Up** on the right side of the page.

Fill in the form to sign up for our **Newsletter**.

5 24/7 CUSTOMER SUPPORT

As long as your site's Alexandria Software Subscription is current, anytime you have a problem or a question, you have access to COMPanion's Customer Support Team. You may call Customer Support 24/7 at 1-800-347-4942 (1-801-943-7277 for international customers) or email support@goalexandria.com.

During the busy time of the year (beginning of school, beginning of the calendar year, and inventory season), you may be asked to leave a voice message. Customer Support will contact you as soon as they are available.

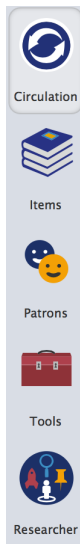
You can also email Customer Support directly from your **Circulation** window. Emailing from the program not only sends your message or question to Customer Support, but also informs them about your machine, its hardware, memory, your data, and the version of Alexandria you are running.

To email Customer Support:

- Click on the **Support** tab along the row of tabs in the middle of the **Circulation** window.
- Type the subject and the desired message in the appropriate fields.
- Indicate the preferred destination of the message from within the dropdown menu at the far right end of the subject field.

Note: In order to email **Customer Support** from your **Circulation** window, you must have a return email specified in your **Site Management** module (accessed from **Tools**) and your **Email Preferences** (**Tools** > **Administration** > **Email**) entered correctly.

LIBRARIAN



From the **Librarian**, you can perform bookdrops and check-outs, run a selected range of reports, perform certain utilities, access tools (e.g. **Inventory, Authority Control, Bulletins**), check **Data Station** status reports (e.g. system analysis, database statistics, and change your **Data Station Preferences**).

1 LIBRARIAN NAVIGATION BAR

The Librarian Navigation Bar is the long, vertical bar to the left of the Circulation window. The bar is visible at all times and contains links to: **Circulation, Items, Patrons, Tools, and Researcher**.

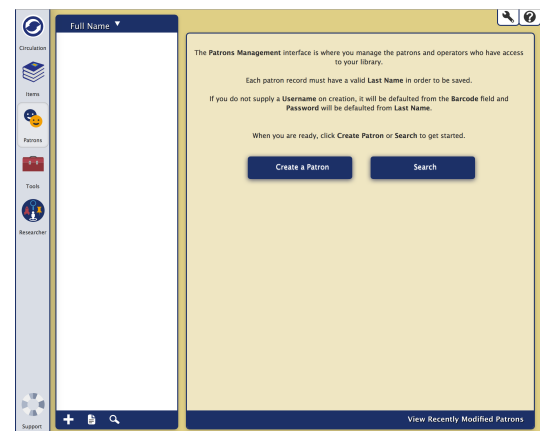
PATRONS



1 ADDING PATRONS MANUALLY (SEE SECTION 4 FOR IMPORTING)

To add a new patron record:

- Click on the **Patrons** module from the Alexandria Librarian Navigation Bar. (TRICK: You may also click on the **Current Patron's** name or on the words **No Current Patron** in the **Circulation Window**).
- The Patrons window will appear. Click the **Add (+)** button near the bottom left corner to add a new patron to you database.
- Move between the **Personal Info, Contact Info, Notes, Statistics, and Lexile** tabs, providing information, configuration options, and making changes to the patron record as needed.
- Use the dropdown menus to supply the new patron's **Policy, Status, and Sex**.
- Use the **Notes** tab to add any special patron alert notes.
- Next, if you intend to give your new patron any operator privileges (e.g. **Student Aide**), use the **Site Access** selection to mark the sites that your patron is permitted to access. Otherwise, leave this selection alone.
- Click **Save** to add your new patron record or **Revert** to discard them.



2 MODIFYING PATRON RECORDS

First Name

Last Name

Barcode From Through

Lexile From Through

Patrons Added From mm/dd/yyyy Through mm/dd/yyyy

Policy Any

Homeroom


Username

Site COMP - COMPanio...

Add to current results

Clear Cancel Search

To modify a patron record:

- Click on Patrons from the Librarian Navigation Bar.
- Click the Find icon  at the bottom of the left pane. The Patron Lookup, shown here, will open.
- Type in the Patron's last name or any pertinent field and press <enter>. Then select the desired patron from the list in the left pane.
- Unlock the patron's record by clicking on the Lock icon.
- Make changes to the patron's record and click Save.

3 DELETING PATRONS

To remove a patron record:


- Click on Patrons from the Librarian Navigation Bar.
- Locate the patron's record and highlight the Patron's name in the left pane. Click on the Actions Menu  and select Remove Patron.

Note: Patrons cannot be removed if they still have items checked out, or if they have any fines or charges.



1 FINDING ITEMS

To find an item record:

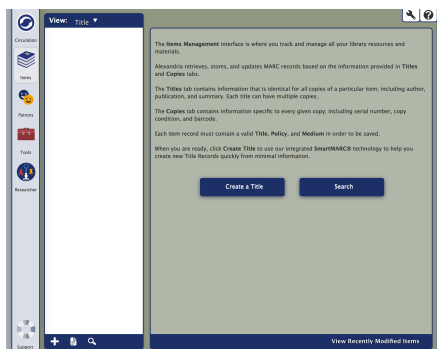
- Click on the **Items** icon from the **Librarian Navigation Bar**. **Item Management** will open.
- Click **Search**, or click the **Find** icon  in the bottom left hand corner.
- Your results will be listed in the left pane.

The search form includes the following fields and options:

- Title**: Text input field
- Author**: Text input field
- Title/Copy Call Number**: From and Through text input fields
- Barcode**: Dropdown menu, From and Through text input fields
- Lexile**: Dropdown menu, From and Through text input fields
- Copies Added**: Dropdown menu, From mm/dd/yyyy and Through mm/dd/yyyy date pickers
- ISBN/LCCN**: Dropdown menu
- Site**: Dropdown menu (selected: COMP - COMPanion Demonstration ...)
- Title/Copy Policy**: Dropdown menu (selected: Any)
- Notes**: Text input field
- Add to current results

Buttons at the bottom: **Clear**, **Cancel**, **Search**

2 ADDING AND CATALOGING TITLES



To add a new title record to your database:

- Click on the **Items** module from the **Librarian Navigation Bar**.
- The **Items Management** module will appear.
- Next, click on the **Add (+)** button located near the bottom of the items pane.
- The **SmartMARC® Title Assistant** will open allowing you to add a new title record. (Press <enter> here to add a blank record.)
- Enter the **ISBN** or **Title/Author** in the **Title Assistant** window and click **Search**.
- Click and highlight to preview the **MARC** record you like best and click **Continue**.
- Modify the **Call Number**, update any necessary fields, and select the proper **Policy** for the item from the **Policy** dropdown menu.
- Click **Save** to add your new title record or **Revert** to discard it. At this time you will want to add the initial copy.

Title	Medium	Location
Matilda Bone	[book]	Local
Matilda	text-unmediated-vol	Local
Matilda	Book	CA - Public - Sacramento Pu
Matilda	Book	CA - Public - Sacramento Pu
Matilda	Book	CA - Public - Sacramento Pu
Matilda	Book	CA - Public - Sacramento Pu
Matilda	Book	CA - Public - Sacramento Pu

Completed: 5 databases examined

```


L0601048cm 2009325 a 4500^
001ocm18496905 ^
0030ColCa^
0052001127120414 0^
0088806151988 nyua j 000 1 eng ^
010 _a88040312^
019 _a49521067^
020 _a978067824397_c116.99^
030 _a067024399 _c115.99^
040 _aDLC_cDLC_gDCL_gDS^
042 _aica^
049 _aRUSA^
05000 _aPZ7.D1515 _bMat 1988^
    
```

Buttons at the bottom: **Back**, **Cancel**, **Enter Manually**, **Continue**

Note: There is no guarantee on a match for the record you want specifically. If you don't find the title you were looking for in the search results, remove the old criteria and try different combinations.


3 ADDING NEW COPIES

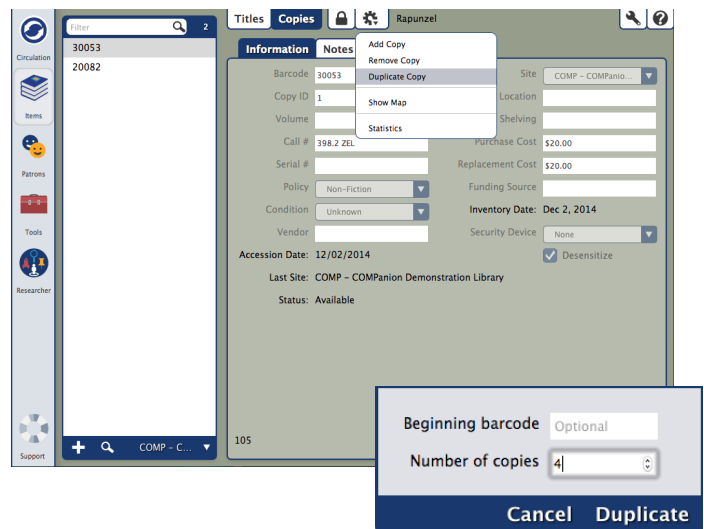
To add a new copy to the title record:

- Click on the **Items** module from the **Librarian Navigation Bar**, and **Item Management** will open.
- Click the **Find**  icon at the bottom of the list to open the **Item Lookup**. Next, locate the title in your database you would like to add copies to.
- Make sure that the **Copies** tab is selected at the top of the page. Remember, copies are an extension of the title record; the **Copies** tab cannot be selected unless the main title record exists or is saved.
- Next, click the **Add (+)** button located near the bottom left of the items pane to add a new copy.
- Move between the **Information** and **Notes** tabs, providing information, configuring options, and making changes to the copy record as needed.
- **Barcode** is required to save your new copy; however, if you do not provide that information, it will default from your **Next Barcode** settings.
- Click **Save**.

4 DUPLICATING TITLES OR COPIES

To duplicate copies:

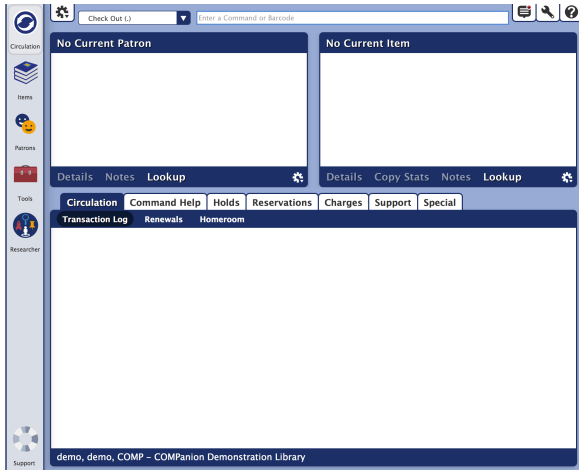
- Click on the Items module from the Librarian Navigation Bar. Item Management will open.
- Open the Item record.
- Click on the Copies tab.
- Click on the Actions icon  next to the lock icon and select Duplicate Copy. The Duplicate Copy window will appear.
- Fill in the Beginning Barcode field and enter the number of additional copies you wish to add in the Number of copies field.
- Click Duplicate.



5 CATALOGING AN eBook

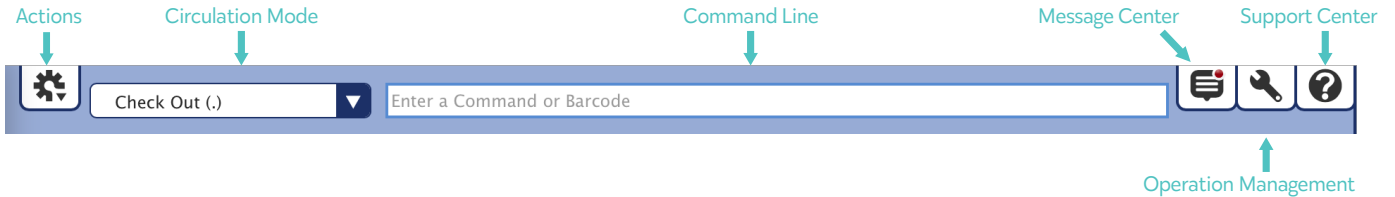
When cataloging an eBook, remember that only Titles are added, not copies, because they are not physically barcoded items.

To indicate an eBook for Search purposes, the eBook Policy preference must be set to Show as ONLINE in Researcher.



The **Circulation** module is the librarian's primary module, used to perform general library activities such as issuing books, placing hold requests, processing fees, fines, payments, and renewing books. You may also perform special functions such as inventory, cataloging, record viewing and updating.

1 CIRCULATION CONTROLS



A. CIRCULATION MODES

Select a **Circulation Mode** from the corresponding drop-down menu, located to the left of the **Command Line**, above the **Current Patron** pane. The selected **Circulation Mode** is the function that will be performed when patron/item barcodes are typed or scanned.

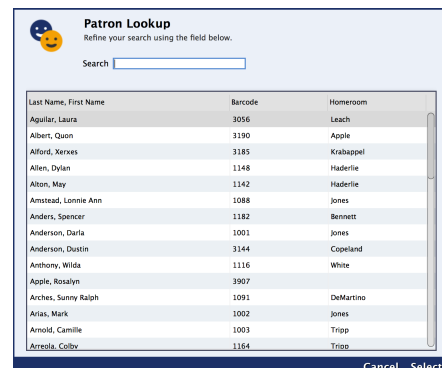
B. COMMAND LINE

Use the **Command Line** to input barcodes to perform the indicated circulation mode or look up **Items** and **Patrons**.

2 LOCATING A PATRON BY NAME (L) OR ITEM BY TITLE (T)

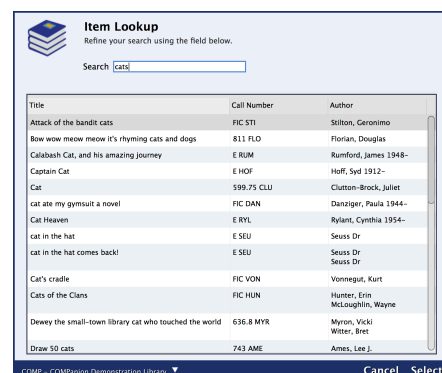
To look up a patron by last name:

- Open the Patron Lookup window by either clicking on the Lookup button along the bottom of the patron pane OR by typing L in the Command Line and pressing <enter>.
- Begin typing the patron's name and hit <enter>.
- Click on the correct name and then click Select, or double click on the correct name.



To look up an item by title:

- Open the Item Lookup window by either clicking on the Lookup button along the bottom of the item pane OR by typing T in the Command Line and pressing <enter>.
- Type the first part of the title and press <enter>.
- Click on the correct title to highlight it and then click on Select, or double click on the correct title.



3 CIRCULATION MODES



A. CHECKOUT

To check out an item:

- Make sure the circulation mode is set to Check Out.
- ALWAYS bring up the patron first.
- Type or scan the barcodes of the items to check out.
- Respond to any Circulation Alert messages.

B. BOOKDROP MODE (B)

To check in a single item using **Bookdrop Mode**:

- In the **Command Line**, type **B**, then scan or type the barcode of the item to be returned. (This will check the item in without changing the current circulation mode.)

C. PLACE A HOLD ON A TITLE (H)

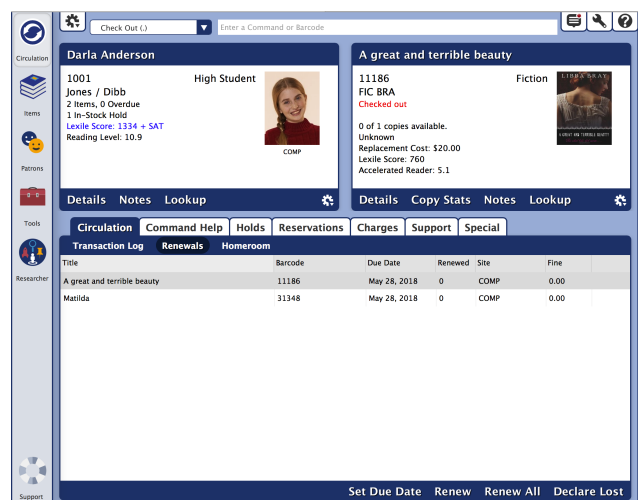
To place a hold:

- Make the patron requesting the hold the “**Current Patron.**”
- Use the Item Lookup window to make the item being held the “**Current Item.**”
- Type **H** (for **Hold**) and **=** (for the **Current Item**) (i.e. **H=**) and press <enter>. You may also type **H** and the barcode of the current item (e.g. H1234). Repeat this step for each item.

D. DECLARING A COPY LOST OR RENEWING AN ITEM

To declare an item lost:

- In **Check Out** mode, scan or type the barcode of the patron with the lost item(s). If the barcode was typed, press <enter>.
- Click on the **Renewals** subtab on the **Circulation** tab.
- Highlight the item(s) to be declared lost.
- Click on **Declare Lost OR Renew**.
- If you are sure you want to make the selected item lost, click **Yes** on the dialog window that opens.
- Complete the process in the **Lost Item Fee** window where you may forgive a portion or all of the charge, take a payment, and print or email a receipt.



To return a Lost Item and provide a refund:

- This can be done by simply bookdropping the item. When asked if the item is no longer lost, answer **Yes**.
- If a payment had been made, go to the **Charges** tab and **History** subtab to refund the payment.
- Complete the process in the **Refund Payment** window where you may enter a cash amount and process with or without a printed receipt.

E. DISCARDING ITEM COPIES

To discard a single damaged item:

- In the **Command Line**, either type **DM** and press <enter> or set the **Circulation Mode** from the dropdown menu. Select a reason for the discard.
- Scan or type the barcode for the damaged item to be discarded. The **Discarded Copies** patron will become the **Current Patron**.
- In the **Discarded Fee** window, you may forgive the charge, enter a payment amount, and process it with or without a receipt.

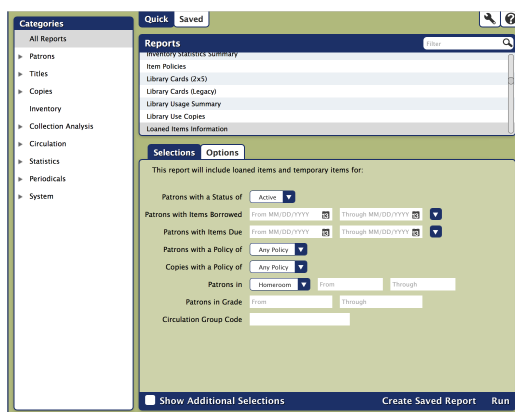


Alexandria has a diverse assortment of tools conveniently contained in a comprehensive “toolbox” that allows you to quickly launch modules that help perform a variety of tasks. These modules are launched when clicking on their corresponding icons in the **Tools** window. Depending on your **Security** permissions, you may not have access to all the modules shown in the **Tools** window.



1 REPORTS

Alexandria’s **Reports** interface allows you to create reports that only include pertinent information: records of interest, transaction types, balance selections, and personalized text on circulation notices. You can also schedule reports and deliver their output via email, FTP, etc.





The **Reports** interfaces uses the familiar three-panel layout found in most Alexandria management interfaces.

The left-hand side of the window is home to the **Categories** pane, containing a list of all existing report categories (e.g. **Titles**) and subcategories (e.g. **Information**). Selections from this pane act as filters, allowing you to narrow your focus and display only relevant reports.

Some examples of Alexandria reports are: **Barcode Labels**, **Overdue Lists**, **In-Stock Holds**, and **Super Summary**.

To create a new report:

- Select **Tools**, then select **Reports**.
- The **Filter** bar, in conjunction with the **Categories** pane, can be used to further filter the list of results in the **Report Selection** pane.
- Click on the category and/or subcategory in the **Categories** pane to the left that is the best choice for the report you want to generate. You are able to expand or contract associate subcategories sections by clicking the icon  located to the left of category name.

- Select the **Report** from the list and it is displayed to the right in the **Report Selection** pane. In the lower portion of the window, in the **Selections** and **Options** tab you will choose the information you want in the report, along with its format.
- Click **Run** in the bottom right corner of the window to queue the report in **Operation Management**. To print a hard copy of the report, click on the **Operation Management** icon , which will open the **Operation Management** window. From here, you can select the report desired and click the PDF icon to view or save the report to your computer.
- If the report generated meets your needs and you want to save the report settings for use in the future, click on **Create Saved Report** in the bottom right corner of the window.

Note: All reports are set up using the same set of steps or formula. The main difference is the type of report or template (**Barcode Labels, Overdue Lists, Hold Lists, etc.**) that you choose.

A. LABEL REPORTS

COPY



PATRON

Categories

- All Reports
- ▼ Patrons
 - Information
 - Account
 - Labels
 - Forms
 - Reviews
 - Usage
 - Lexile
 - Legacy
 - Email
 - ▶ Titles
 - ▶ Copies
 - ▶ Inventory
 - ▶ Collection Analysis
 - ▶ Circulation
 - ▶ Statistics
 - ▶ Periodicals
 - ▶ System

Quick **Saved**

Reports

- Patron Barcode Labels (3x10)
- Patron Labels (4x20)
- Patron Mailing Labels (3x10)

Selections **Options**

This report is formatted for 3 x 10 label sheets, COMPAnion Part Number V0055. Include labels for:

Patrons with a Status of

Patrons in Security Group

Patrons with a Policy of

Patrons from From Through

Patrons in Grade From Through

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

Patrons with Last Name

Patrons in Barcode Range From Through

Patrons with Barcodes

NOTE: For labels to print correctly, set your printer page scaling to none or 100%.

Show Additional Selections

B. OVERDUE ITEMS

Categories

- All Reports
- ▶ Patrons
- ▶ Titles
- ▶ Copies
- ▶ Inventory
- ▶ Collection Analysis
- ▼ Circulation
 - Information
 - Charges and Payments
 - Notices
 - Holds
 - Reservations
 - ▶ Statistics
 - ▶ Periodicals
 - ▶ System

Quick **Saved**

Reports

- Loaned Items Information
- Overdue Items and Unpaid Charges Information
- Overdue Items Information
- Overdue Items Posting List
- Temporary Items Information

Selections **Options**

Include records for:

Patrons with a Status of

Patrons with items Days Overdue

Patrons with a Policy of

Patrons in From Through

Patrons in Grade From Through

Circulation Group Code

Patrons with Last Name

Patrons in Barcode Range From Through

Patrons with Barcodes

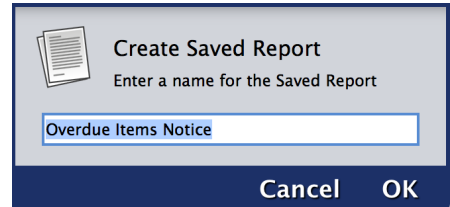
Show Additional Selections

C. OVERDUE NOTICE

D. LOANED ITEMS REPORT

E. SAVING, SCHEDULING, AND SENDING REPORTS

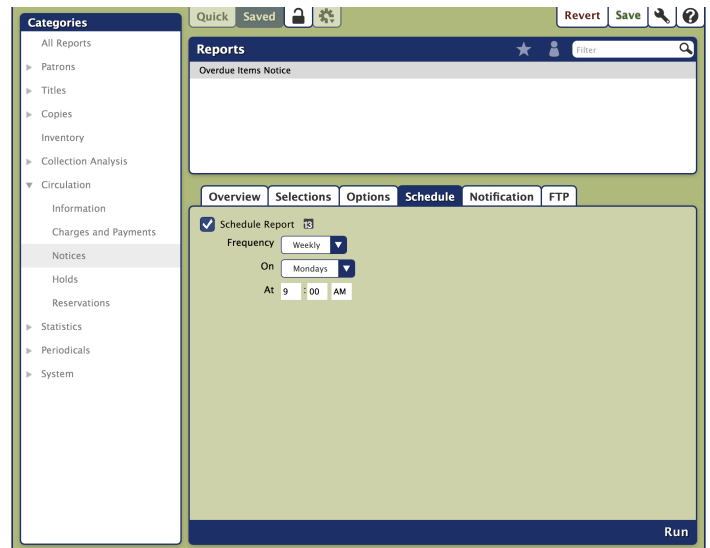
Once you create and save a report in the Reports module, you have the additional option to schedule certain reports to run automatically as well as to send them on a regularly scheduled basis as a link in an email to the recipient of your choice.



To create a Saved, Overdue Notice Report and schedule it to be sent weekly to a specific homeroom:

- Click **Reports** from the **Tools** module and choose **Circulation** from the **Categories** pane.
- Choose **Notices** from the expanded dropdown list and then **Overdue Items Notice** from the **Report Selection** pane.
- Click on the **Selections** tab and enter the selection criteria for the report including **Patron Status**, **Days Overdue**, **Patron Homeroom**, **Patron Grade**, and more.
- Click **Create Saved Report**, name your saved reports, and click **OK**.

- Once your saved report is created, you will notice the report is now listed under the **Saved** tab. You will also notice additional tabs available below the **Report Selection** pane such as **Overview**, **Selections**, **Options**, and **Schedule**.
- Click **Schedule**, unlock the report and then click the **Schedule Report** checkbox.
- Click the **Frequency** dropdown menu and select **Weekly**. Then select the desired day from the dropdown options, then finally enter the time the report will be run.



- Click the **Notifications** tab and check the box to **Enable Email Notification**. Enter the email address of, for example, the homeroom teacher.
- Click **Save** in the upper right hand corner.


2 UTILITIES

Utilities can be accessed by selecting the **Tools** module from the **Librarian Navigation Bar** and selecting the **Utilities** tool. **Utilities** are used to change large amounts of information in your database at once. The **Utilities** window allows you to create your own set of essential utilities; we provide the general templates that help you build utilities that modify, transfer, remove, update, or verify the information you require.

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

Follow the same process used when creating reports by picking the proper category from the **Categories** pane and selecting the desired utility from the **Utility Selection** pane. The rest of the process should look familiar to you from the **Reports** section covered previously.

Utilities can also be saved just like **Reports**. After you create your new utility, click **Create Saved Utility** at the bottom of the pane. After adjusting the utility name (optional), your new utility—including custom settings—will be added to the **Saved** tab.



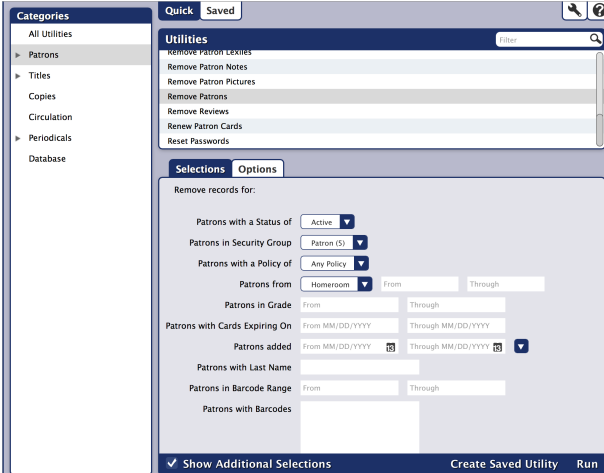
Create Saved Utility
Enter a name for the Saved Utility

Cancel OK

Note: A Complete List of Utilities can be found at <http://support.companioncorp.com/display/ALEX/Utilities>

A. PATRON UTILITIES

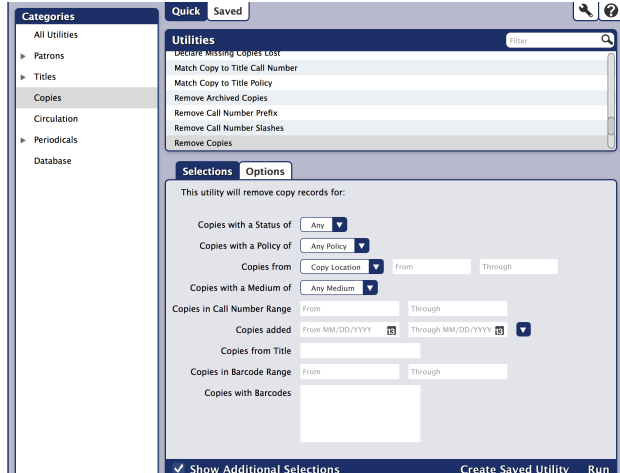
REMOVE PATRON



The screenshot shows the 'REMOVE PATRON' utility interface. On the left is a 'Categories' pane with 'Patrons' selected. The main area has a 'Utilities' list with 'Remove Patrons' selected. Below is a 'Selections' pane with the following options: 'Remove records for:'; 'Patrons with a Status of' (Active); 'Patrons in Security Group' (Patron ID); 'Patrons with a Policy of' (Any Policy); 'Patrons from' (Homeroom); 'Patrons in Grade' (From/Through); 'Patrons with Cards Expiring On' (From/Through); 'Patrons added' (From/Through); 'Patrons with Last Name' (From/Through); 'Patrons in Barcode Range' (From/Through); 'Patrons with Barcodes'. At the bottom are buttons for 'Show Additional Selections', 'Create Saved Utility', and 'Run'.

B. TITLE/ITEM UTILITIES

REMOVE COPIES



The screenshot shows the 'REMOVE COPIES' utility interface. On the left is a 'Categories' pane with 'Copies' selected. The main area has a 'Utilities' list with 'Remove Copies' selected. Below is a 'Selections' pane with the following options: 'This utility will remove copy records for:'; '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/Through); 'Copies added' (From/Through); 'Copies from Title' (From/Through); 'Copies in Barcode Range' (From/Through); 'Copies with Barcodes'. At the bottom are buttons for 'Show Additional Selections', 'Create Saved Utility', and 'Run'.

3 IMPORTS



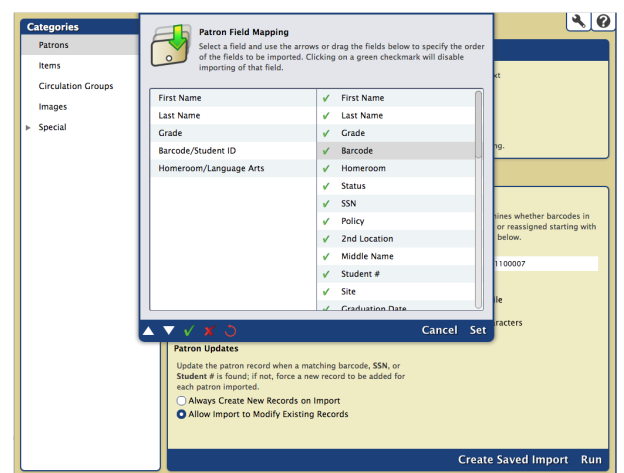
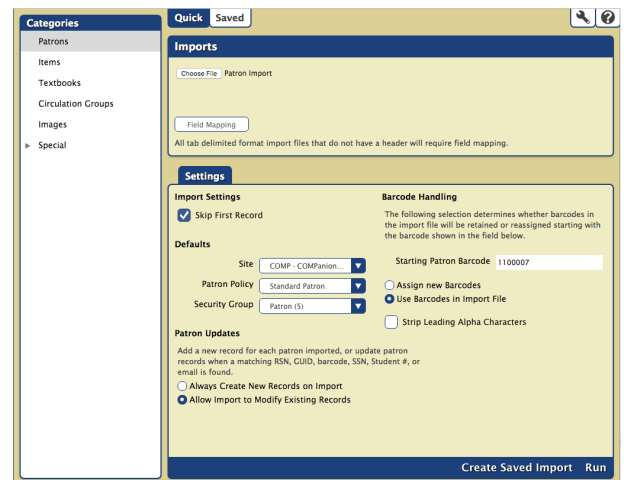
There are times when you'll want to add information into Alexandria from outside sources (such as MARC records, book vendors, or patron information from a central database), called an **Import**. Our software supports the importation of patron, item, and transaction command information.

A. IMPORTING PATRON RECORDS

Patron records may also be imported into Alexandria from a tab delimited file. If you have a student information system that can export student data in a tab delimited format, please look at the fields in **Patron Management** to determine what information you wish to have exported from your student information system.

To Import Patron Records:

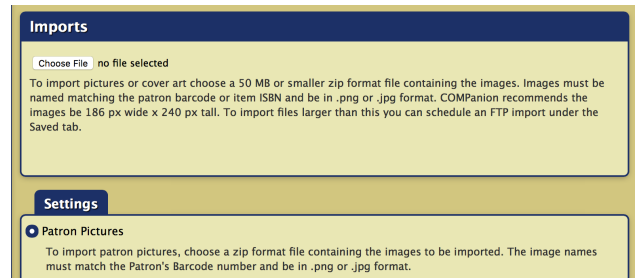
- Click the **Tools** module from the **Librarian Navigation Bar** and select **Import** from the list of **Tools**.
- Click **Patrons** from the list of **Categories** in the **Categories** pane.
- Select **Allow Import to Modify Existing Records** in order to import current information into existing patron records.
- If the import file includes barcode numbers for your patrons, select **Use Barcodes in Import File**. Otherwise Alexandria will sequentially assign barcodes starting with the barcode number displayed in the **Starting Patron Barcode** field.
- Browse and select the file to be added.
- Click the **Field Mapping** button. In the **Field Mapping** window, match the fields in the import file with the appropriate fields in the patron record. Click **Set**.
- Click on **Run** to queue the patron import.



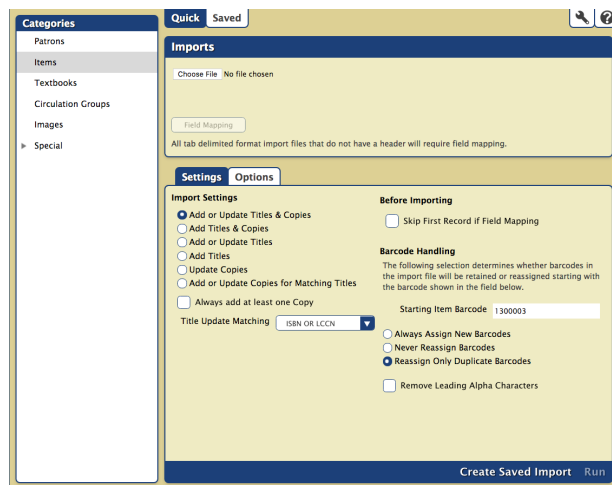
Note: Alexandria will set various fields by default. For example, **Policy** and **Status** will be saved as **Standard** and **Active** respectively if another policy is not selected or included in the import file. Take the opportunity to add as many fields as you have available. Alexandria will fill in the **Username** and **Password** using the patron's barcode for the **Username** and their last name for the **Password**.

To Import Patron Pictures:

- Go to the **Tools** module and select **Import**.
- Click on **Images** from the **Categories** pane.
- Select **Patron Pictures** from the options on the **Settings** tab.
- Browse and select the folder containing the picture files.
- Click **Run**. The import will be queued in **Operation Management**.



B. IMPORTING ITEMS



To Import Item Records from a Vendor File:

- Go to the **Tools** module and select **Import**.
- Click the **Items** category in the **Categories** pane.
- On **Quick** tab, click on the **Settings** tab and check the box **Archive Before Import**.
- Set your selections for the options on this tab. When importing item records for eBooks from a vendor, select **Import Titles Only** from the **Import Settings** section.
- Use the **Browse** button to find and select the file to be added.
- Click on **Run** to queue the item import.

Note: If you would like to run an **Archive** before making mass changes to the database, for example, when running **Utilities** or **Imports**, please see *Database Utilities* or *Administration* in **Tools**.

4 PREFERENCES

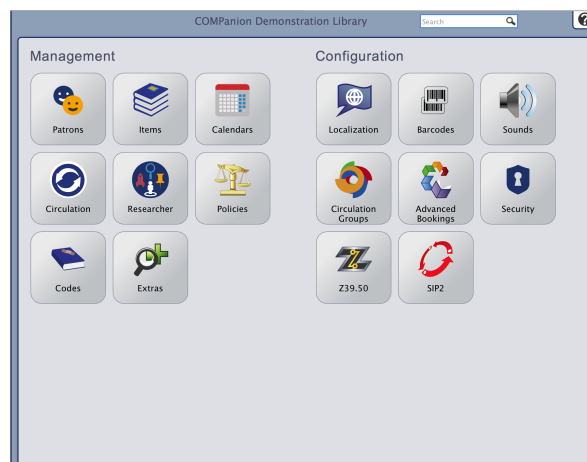
The **Preferences** window is where you can customize Alexandria to suit your needs by setting system (i.e. “global”) and site (i.e. “local”) preferences.

A. MANAGEMENT PREFERENCES

POLICIES

Patron Policies establish circulation privileges for patrons, while the rules for circulating various types of items are established within the **Item Policies**.

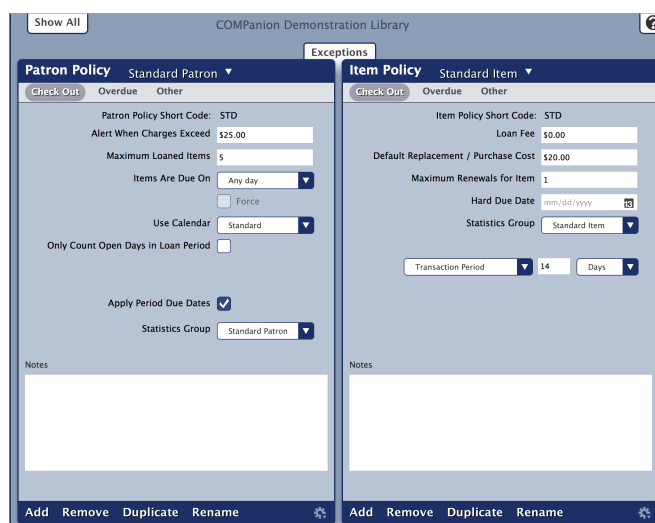
For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and nonfiction works can be set for two weeks, etc.

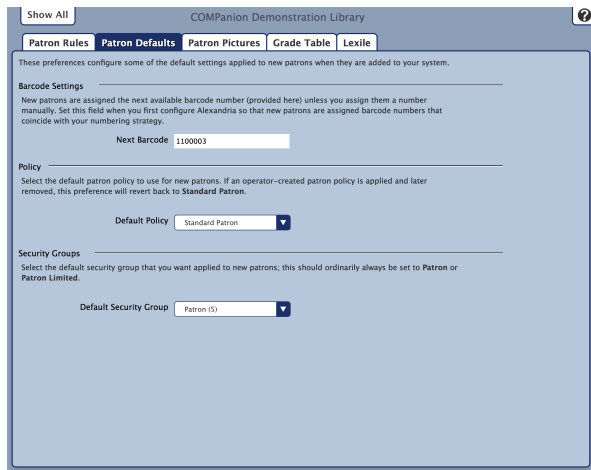


Note: The manner in which much of your statistical data is generated within Alexandria is determined by the policies you create.

USING THE POLICIES PREFERENCE

When you first enter Alexandria, **Standard Patron** and **System Patron** are set as default patron policies while **Standard Item**, **System Item**, **eBook** and **Web Page** are set as policy defaults for items. We suggest you adjust the settings for **Standard Patron** and **Standard Item** to reflect what would be applicable for the majority of your patrons and items so that if you ever forget to change a patron (or an item) policy to the appropriate policy, generally, your library’s established procedures will be followed.





PATRONS

Patron Rules

Set the default state of the **Keep Patron History** option for your patrons, and also choose to enable/disable patron card expiration dates.

Patron Defaults

Use these preferences to configure some of the default settings applied to new patrons when they are added to your system; for example, set the patron's **Default Policy** and **Next Barcode**.

Patron Pictures

You can affix nearly any image supported by your browser (commonly accepted formats are *.jpg*, *.gif*, *.png*, or *.bmp*) into one of the three gender-based patron picture fields. If you don't have individual patron portraits assigned in the **Personal Info** tab of **Patron Management** window, these pictures will be used instead. Optimal image size for patron pictures is 186 pixels wide by 240 pixels high.

Grade Table

Individually enter each grade level relevant to your union in the order they should be sorted and incremented. This is a simple list; the first entry in the **Grade Table** will be your first grade level, the second will be the next grade level, etc.. The **Grade** and **Description** entries in the table are fully customizable, allowing you to use whatever terminology you desire.

Lexile

The Lexile values established here are used to track your patron's reading progress as they move from kindergarten through high school.

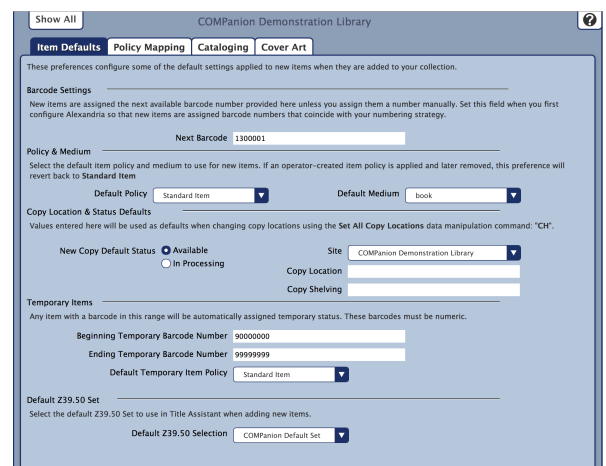
ITEMS

Item Defaults

Configure some of the default settings that are applied to new items (i.e. title and copy records) when they are added to your collection.

Policy Mapping

Centralized Catalog users often want items at their location to use their own policies (for better statistics reporting); the **Policy Mapping** preferences tab allows you to input lists of call number ranges which can be used to link import items (i.e. items entered via import only) to existing policies at your site. Provide an alphabetic value for call numbers beginning with letters of the alphabet (e.g. ABC) or a numeric value to designate cal number that fall within a numeric range (e.g. 300-310).



Cataloging

These preferences are used to help manage and configure your catalog classification system so that you can allocate call numbers to your resources.

Cover Art

Drag and drop an image of nearly any format (e.g. *.jpg*, *.gif*, *.png*, or *.bmp*) supported by your browser into the **Medium Picture** field. After completing this action, a new default image is applied to every item (of that medium) lacking individual cover art. Item pictures are used in several areas of the program, including the **Circulation** window every time an item is made current.

CIRCULATION

User Interaction

These preferences control the level of interaction that operators have with the program and what additional content is displayed.

Circulation Rules

Configure general circulation settings for, among other things, holds, reservations, and charges.

Receipts

If you print receipts for patrons at your site, these preferences allow you to customize the information printed on your receipts; this information applies whether you print an 8.5”x 11” receipt from a local or network printer or a 3” receipt from one of COMPanion’s **Receipt Printer**. The settings that configure when receipts are printed can be located in the **Brower Settings** subtab.

Letters

Customize and manage the messages that appear in the patron notices from your library; these include overdue notices, recall messages, etc.. Use the **Letter Type** section to select the notice to edit.

Circulation Settings

This is where you will **Enable Automatic Email Notifications**. For those in a *Centralized Catalog* environment, the **Interlibrary Loans** settings configure the default time periods (in days) allowed for items “in transit” or “in stock” before showing up in the **In Transit to Current Site, Late in Arrival** report.

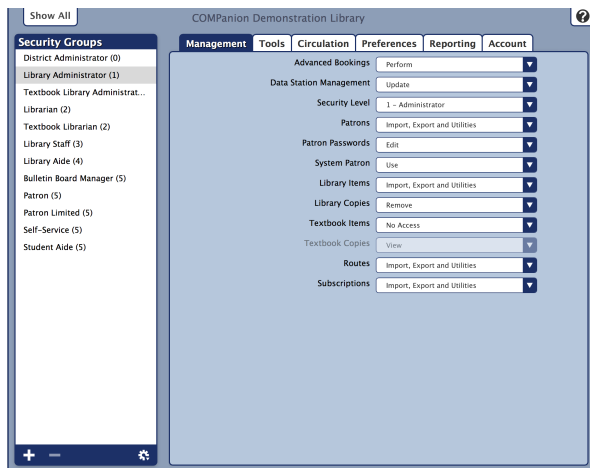


B. CONFIGURATION PREFERENCES

SECURITY

Security preferences allow operators (with the appropriate authority) to modify existing or create their own custom security groups by manipulating lists of permissions.

Using the dropdown menus contained in each tab, you can enable or disable specific security privileges for the selected security group.



Management

These permissions define how operators are allowed to access and interact with Alexandria's management windows; these include **Patrons**, **Items**, and **Advanced Bookings**.

Tools

These permissions dictate whether operators are allowed to access tools and management windows such as **Inventory**, **Sites**, **Authority Control**, and **Operation Management**.

Circulation

These permissions dictate whether operators are allowed to access and edit charges, refunds, payments, reservations, holds, and other transaction services.

Preferences

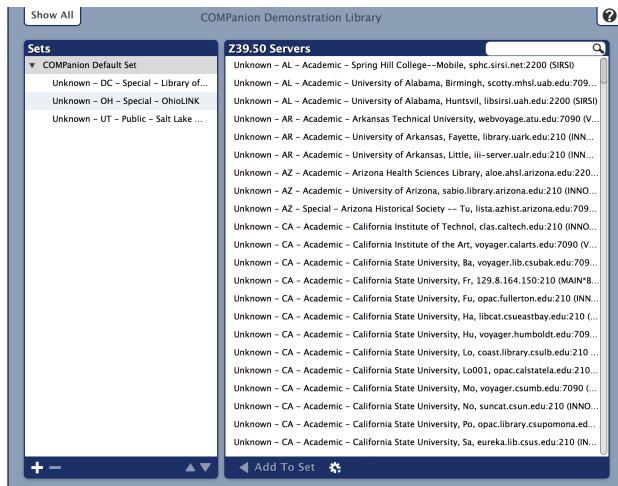
These permissions dictate whether operators are allowed to access and edit **Preferences** and **Machine Preferences**.

Reporting

The permissions govern what report types operators are allowed to view, add, edit, or remove.

Account

Manage how patrons are allowed to interact with the **Researcher** interfaces; placing holds, writing reviews, etc. and set password requirements.



Z39.50

Alexandria's Z39.50 preferences allow you to add, edit, test, or remove Z39.50 server addresses and even store them in "sets".

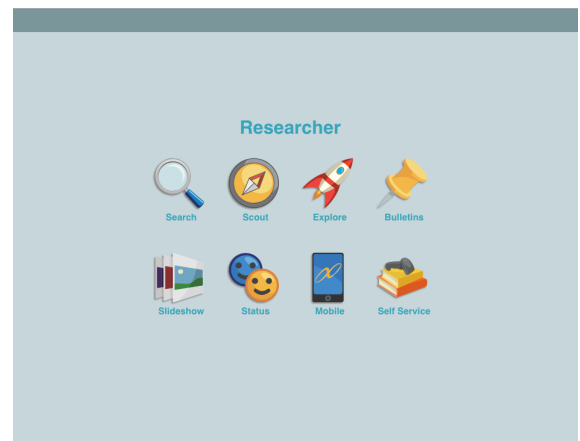
The left-hand side of the Z39.50 preference contains the **Sets** pane, where all your sets are displayed in chronological order. The **Sets** list is essentially a collection of Z39.50 server addresses that you can **Add** or **Remove**. The footer contains tools for adding, removing, or rearranging Z39.50 server addresses within the set.

RESEARCHER



The Alexandria [Researcher](#) is a collection of robust, visually engaging, and intuitive library search interfaces that appeals to children, teenagers, and adults. Both patrons and operators are able to search authorized collections over the web.

The [Researcher](#) can be accessed from the [Librarian](#) by selecting [Researcher](#) from the main [Librarian Navigation Bar](#). Otherwise, patrons can access [Researcher](#) modules to search *any* library collection by entering the IP address of your main Alexandria Data Station in the URL or address field of their favorite internet browser.



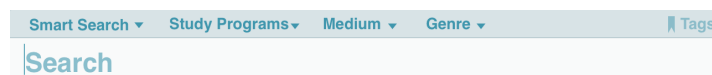
1 SEARCH

The advanced features of the [Search](#) interface help you to locate books and other available library materials. With [Search](#), you can interact with others in your community through book reviews, saved lists, and shared titles. Use [Patron Status](#) to manage your account.

SEARCH PANE

The Search pane allows you to modify or enhance both your pre and post search.

The [Smart Search](#) setting is generally recommended; however, you may also search by [Authors](#), [Awards](#), [Bibliographic](#), [Call Number](#), [Curriculum](#), [Notes](#), [Series](#), [Subjects](#), and [Titles](#).



Study Programs

Selecting one (or more) before you search is an easy way to find books that use reading programs such as *Accelerated Reader®*, *Reading Counts!®*, *Lexile®*, and *Fountas & Pinnell*.

All Mediums

From here, you can specify a medium to search, such as book, ebook, sound recording, etc.

Genre

You can choose to search [All Genres](#) or [Select a Genre](#).

Tags

When doing a search you can **Tag** terms/subject from your **Results List** and revisit them later.

Performing a Search

As you type, Alexandria will start returning the most relevant results immediately.

Results

After a search, the **Results List** appears with useful tools that help you narrow down results using post-search filters and add found titles to **Saved Lists**.

2 SCOUT

Scout is a fast, powerful, and genuinely intuitive smart search that favors titles, authors, series, and subjects before all other results. In fact, exact title and author matches are always shown first, making your results significantly more relevant.



3 EXPLORE

Explore is a visually engaging graphical interface that uses large, clickable icons to locate items in your collection. Customize **Explore** with **Explore Builder**.

EXPLORE PANES

To search using the **Explore** interface, click on one of the picture-buttons. Some of these buttons will perform instant searches; others will take you new panes, and some can even open outside websites in a new tab of your web browser.

The results that are returned from an **Explore**-based search look exactly the same as those from a standard search.



4 BULLETINS



Bulletin Board Management allows you to create virtual *boards* where you may post and share public *bulletins*. Both boards and bulletins can be created from any Alexandria Librarian as long as you have the proper Security credentials.

Create notices for your library, student-based clubs, and upcoming school events; these bulletins can contain both text and images.

Bulletins may also contain links to outside reading lists or anything with an associated URL; these optional URLs will open in a new browser tab/window.

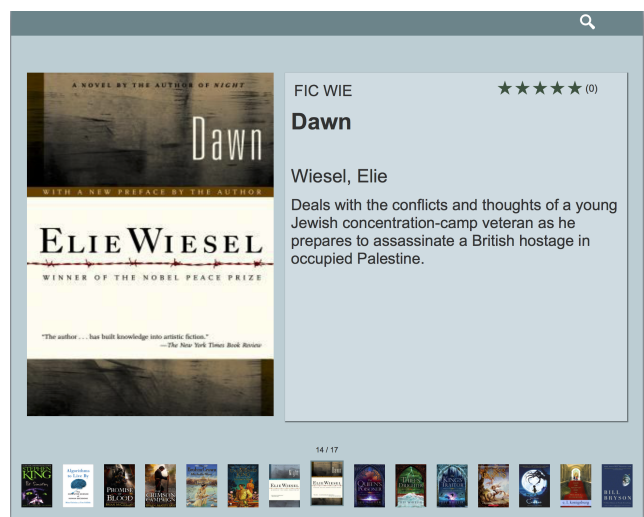
You can even attach links to Alexandria reports generated from **Operations Management**; instead of posting a **Patron Overdue List** to your library wall, you could provide a link in a special bulletin.

Both the boards and the bulletins they contain may be configured, individually, to only be visible during specified date ranges; they can be assigned an automatic expiration date or remain posted for an indefinite length of time.

Your patrons can view public bulletins from the **Alexandria Researcher** or by typing the IP address (or domain name), port number, and (optional) serial number of your Data Station followed by “/bulletins” in their browser’s **Address** field. Individual boards may also be bookmarked or linked to directly.

5 SLIDESHOW

Slideshow is a captivating and fun way to showcase titles to your patrons. Choose what you would like **Slideshow** to display; recently added titles, holiday books, award winners... the possibilities are endless!



Enjoy Alexandria!

For more information, contact Alexandria Customer Support. As long as your site's Software Subscription is current, anytime you have a problem or a question, you have access to COMPanion's Customer Support Team.

1-800-347-4947 support@goalexandria.com

Or visit our online Support Center at support.companioncorp.com/display/ALEX