Alexandria®

GETTING STARTED GUIDE

VERSION 7

CLOUD-HOSTED



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Please carefully read this Getting Started Guide before setup or use of the Alexandria system. If, after reading these instructions, you still have questions, please contact Customer Support at support@companioncorp.com or call (800)-347-4942.

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PACKING LIST

THANK YOU FOR CHOOSING ALEXANDRIA!

You have licensed the following product(s); if you have questions, please contact COMPanion at 1-800-347-6439.

| CLOUD-HOSTED LICENSES | | |
|-----------------------|---------|--|
| 3 UserLicense | □ A7403 | |
| 5 User License | □ A7405 | |
| 10 User License | □ A7410 | |
| 15 User License | □ A7415 | |
| Site License | □ A7430 | |
| Centralized Catalog | □ A7439 | |

These optional services are activated by registration codes; setup information is available by searching key code in Alexandria's online Support Center.

| Lexile Measures | □ E5590 | Sneak Peek | □ E596 |
|-------------------|---------|----------------|---------|
| Z39.50 Server | □ E5577 | netTrekker | □ E5928 |
| SIF Interface | □ E5565 | NoveList | □ E750 |
| SIP2 Interface | □ E5566 | SAFARI Montage | □ E6523 |
| Advanced Bookings | □ E5588 | OverDrive | □ E5567 |
| Search Widget | □ E6522 | MackinVIA | □ E5568 |
| | | Axis 360 | □ E5569 |
| | | Perma-eHub | □ E5598 |
| | | eBook Bundle | □ E5599 |

COMPanion CLOUD-HOSTED SOFTWARE SUBSCRIPTION INCLUDES:

- Free upgrades to more advanced, future versions at no extra charge.
- Customer support—24 hours a day, 7 days a week (via email, toll-free fax, and toll-free phone).
- Online resources including our Support Center and electronic updating.
- Access to Alex-Net (an online discussion group for Alexandria users).

WELCOME TO ALEXANDRIA

Alexandria has been automating public, school, college, and church libraries around the world for nearly 30 years. Welcome to our family of happy users!

Alexandria is a comprehensive library automation software system designed to efficiently manage your assets, electronic resources, and patron information—freeing librarians and technology specialists to deal with more important tasks.

Alexandria interfaces are cross-platform and accessible on both Macintosh and Windows operating systems via HTML-5 compliant web browsers—or mobile devices, laptops, and tablets such as Apple's iPad, Google's Chromebook, and others.



The **Alexandria Librarian** interface is where you check items in and out, run reports, perform utilities, access administrative tools, and change your preferences and policies.



The **Alexandria Researcher** empowers your patrons with a suite of visually engaging search interfaces used to discover and access your resources.

This Getting Started Guide shows you how to access both the Alexandria **Librarian** and **Researcher** interfaces and provides you with setup suggestions and references where you can find additional help and information.

CLOUD-HOSTING BENEFITS



When Alexandria is hosted in the cloud, you save time and resources. From our advanced data centers, we perform daily archives and backups of your data and handle all the updates and upgrades to ensure you always have the latest features.

Database Administration and Support

- Setup-free; no software installation, no necessary maintenance.
- Specialized staff with tools to monitor performance, connection, and stability 24/7.

Dedicated Connection

- An internet connection gives you access to Alexandria anywhere in the world.
- We provide the DNS name for your library (e.g. mylibrary.goalexandria.com).
- Communications between you and our servers are safe and secure.
- No special ports or firewall configurations; third-party connections are hassle-free.
- Redundant internet connections, battery-backup, and generator-protected power.

No need to purchase hardware

- We install your Data Station and host your library database in our data center.
- Hosted servers use state-of-the-art hardware for optimal performance and reliability.

1 REGISTRATION

Registration is automatic; just follow the URL we provide you and begin managing your library immediately.

COMPanion will email you this URL and the login **Username** and **Password** required to access Alexandria. If you can't locate this email, check your SPAM, junk, or deleted items folders as your confirmation email may have been accidentally placed there.

If you've licensed **Lexiles, SIP2, SIF, Z39.50 Server, Advanced Bookings**, or any of our vendors or search extras, they will also be automatically activated.



ACCESSING ALEXANDRIA

Alexandria interfaces are cross-platform and accessible on both Macintosh and Windows operating systems via HTML5-compliant web browsers such as Chrome, Firefox, Safari, Edge, or Internet Explorer.

To access the **Librarian**, Alexandria's primary management interface, enter the IP or DNS address and (optional) port number of your Data Station followed by "/librarian" in your web browser's address field (typically located in the top- left of the window): http://yourlibrary.goalexandria.com/librarian



BOOKMARKING THE LIBRARIAN

For convenience, you can "bookmark" the **Librarian** or add it to your browser's list of **Favorites**. To do this, when you're at the **Log In** window, click your browser's corresponding **Bookmark** icon. You may also create a shortcut to the **Librarian** from your operating system's **Desktop**; to do this, open up the Librarian, highlight the URL in the **Address** field (or "favicon") and drag it to your **Desktop** to create a link.



SECURITY OPERATOR LOG IN

In order to prevent unauthorized access and protect your private information, a valid **Username** and **Password** are required to access **Librarian** interfaces. A **District Administrator**-level operator with the equivalent **Security Group** access has already been created for you; please review your confirmation email for your login information.



After logging in, the name and site of the current operator is shown at the bottom-left of the **Circulation** window.

Lightman, David, WHS - Washington High School

Future access to Alexandria requires that each operator have their own **Username** and **Password** along with an appropriate **Security Group** to pass the security **Log In** window. Keep in mind that some operators may not have permission to access certain interfaces or perform some tasks.

When you are ready to create additional Alexandria operators, review **Patrons Management** on page 8 or search Alexandria's Support Center using keycode 00



INTERFACES AND MODULES

Here are just a few examples of Alexandria interfaces that you can access by appending to the end of your Data Station's (DNS or IP) address. Operators attempting to access certain interfaces must have the proper **Security Group** permissions. You may first also need to change the default ports or configure the server domain names that Alexandria uses; read more about configuring your general web access settings on page 10.

PROMINENT ALEXANDRIA INTERFACES AND MODULES

| /librarian | Alexandria's main operator hub, providing access to all the modules needed to manage and maintain your library. |
|--------------|---|
| /researcher | Our collection of search interfaces allows patrons to explore your library collection based on their skill level. |
| /admin | Advanced technical settings—manage email services, configure web settings, upgrades, and archives. |
| /selfservice | Set up a self-service station where patrons can check out their own materials. |
| /inventory | An interface specifically designed to ease the burden of performing inventory. |

Our most current list of Modules can be found on Alexandria's Support Center main page.



SITE SELECTION - CENTRAL CATALOG



In a **Central Catalog**, you will need to select a site after **Log In**. If you don't yet have sites other than the union site, review the **Sites Management** section on page 9 to find out how and where to create them; you may also search Alexandria's Support Center using keycode st

SET UP & ORIENTATION

THE ALEXANDRIA LIBRARIAN INTERFACE

After Log In, you'll arrive at the Circulation window. One of the first things you'll notice is the navigation sidebar on the left-hand side of the window. Each icon in the navigation sidebar is a shortcut to one of Alexandria's Librarian modules: Circulation, Item Management, Patron Management, and Tools.

LIBRARIAN MODULES



CIRCULATION

The Circulation module is used to perform general library actions such as issuing books, placing hold requests/reservations, processing fees/fines/payments, and renewing books. You may also perform special functions such as inventory, cataloging, and record maintenance.



ITEM MANAGEMENT

The Items Management module is where you manage information about every asset in your collection. This is also where you examine, add, modify, or remove all title and/or copy records that circulate in your library (books, periodicals, multimedia, and eBooks).



PATRON MANAGEMENT

The Patrons Management module is where you create, view, modify, and remove information about the patrons and operators who have access to your site—including their security permissions.



TOOLS

The **Tools** module contains convenient shortcuts to a wide range of program and management tools that perform a variety of tasks. Everything from Preferences to Administration settings, not to mention Reports, Utilities, Exports, and Imports.



RESEARCHER

The **Researcher** portal allows patrons and operators to choose the interface used when searching a selected Alexandria database. For example, selecting Search, Scout, or Explore will open these modules in your default browser.

As a shortcut to one of the above modules, follow the end of your Data Station's domain name with one of the following terms: "/circulation". "/itemse". "/entresse" or "/itemses". "/entresses" or "/itemses". following terms: "/circulation", "/items", "/patrons", or "/tools".

As you explore Alexandria, you will gradually grow more comfortable with the standardized layout of the management windows and the location of important settings and features. You may notice a round **Help ?** icon in the upper-right corner of most interface widows; clicking this will open a new tab in your web browser that forwards you to a related section of Alexandria's online Support Center.

After accessing the **Librarian** and familiarizing yourself with the interface, we suggest you configure your site information before going any further. Although most of your union site information may have been provided for you, you'll want to verify that the information is accurate; you may also want to amend it to better represent your district entity. If you are a **Central Catalog**, now is the perfect time to add additional sites.

Don't forget to provide a valid **Email** in **Sites Management**; this is crucial in order for email to work in Alexandria.



SITES MANAGEMENT - CENTRAL CATALOG

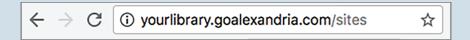


SITES MANAGEMENT

For single site licenses, you will only ever maintain information for one site; we call this the union site. However, in a **Central Catalog**, you manage multiple collections and, in that configuration, the union site should no longer be regarded as an actual, physical location — instead, think of it as the "parent" to which all your other site collections belong.

Regardless, Alexandria retains the union site in a **Central Catalog** to assist you in setting up and configuring additional sites.

To access the **Sites Management** module, append "/sites" to the end of your Data Station's domain name (or IP address).



To learn how to add, duplicate, delete, and edit site records using the **Sites Management** module, search Alexandria's Support Center using keycode st

Once you've established your sites, it's time to configure your **Administration** settings.

3

ADMINISTRATION SETTINGS

Use the **Administration** interface to automate archives and configure web/email settings. This is also where you update Alexandria to the latest version. These settings should be configured before any preferences are set or circulation services performed.

Please note that these are advanced, high-level settings used to configure the Data Station (i.e. server); they are intended for network administrators, information technology support departments, or operators who have been assigned the task of overseeing your system.

To access the **Administration** settings, append "/admin" to the end of your Data Station or IT Controller's domain name.

An operator's access to these settings is governed by the Data Station Management dropdown menu found in the **Management** tab of your **Security Preferences** (page 12). By default, only operators with **Administrator** level security are allowed to make changes to these settings.

To learn how to update Alexandria from the **Administration** interface, see page 20. For more information on **Data Station Administration** settings, search Alexandria's Support Center For more information on **IT Controller Administration** settings, search Alexandria's Support Center on

DATA STATION ADMINISTRATION SETTINGS CHECKLIST



EMAIL EM



The **Email** settings are used to configure how Alexandria communicates with your library's email server; they are required if you want to send letters and notices from within Alexandria.

PRFFFRFNCFS

Alexandria's Preferences allow you to make changes to the system and its behavior. They are divided into the following two categories: Management and Configuration. Clicking on an icon in one of these two categories allows you to view the related preference settings within.

Alexandria is highly configurable; however, it's not possible to cover every available preference setting in this guide. In addition, no two libraries are the same and some preferences may not be accessible until after they're licensed. Therefore, we suggest you configure the following essential preferences to get Alexandria up and running.

Sometimes users with special needs require targeted instructions to get set up properly. For these individuals, we recommend going straight to Alexandria's Support Center (http://www.goalexandria.com/v7Docs/index.php/Main_Page) to review comprehensive documentation about our various preferences, configurations, modules, services, features, and add-ons; it thoroughly covers each and every one of them, including advanced techniques for uncommon scenarios.

To access Alexandria's **Preferences**, append "/preferences" to the end of your Data Station's domain name.

For more on Alexandria's **Preferences**, search Alexandria's Support Center using keycode (PF)



PRFFFRFNCFS CHFCKLIST

We recommend that you configure your **Preferences** in the following order:

| Security | Create and manage your operator security groups and access levels. |
|--------------|---|
| Localization | If required, customize your local terminology and currency standards. |
| Calendars | Schedule library open days, closed days, period due dates, and more. |
| Policies | Establish rules that regulate how your library resources are used by patrons. |
| Circulation | Configure how your operators interact with Alexandria. |
| Barcodes | Configure how Alexandria reads patron and item barcodes. |
| Patrons | Configure general settings for your patrons and operators. |
| Items | Configure general settings for library materials and resources. |
| Researcher | Configure your online public access catalog defaults and general access privileges. |



SECURITY SP



The **Security** preferences are used to create and manage operator access levels by manipulating lists of permissions. An operator's security level determines what actions they are allowed to perform and what areas of the program they have access to.



LOCALIZATION



The **Localization** preferences allow you to customize your local terminology and currency standards.



CALENDARS CA



The Calendars preferences are used to schedule library open days, closed days, period due dates, and more. Combined with Policies, Calendars are used to accurately perform circulation-based calculations: assign due dates, calculate fines, and manage holds, among other things.



POLICIES P



Your **Policies** establish how library materials are used by patrons; this includes how they circulate, how long they may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. Policies are an essential part of successful circulation, reports, and statistics.



CIRCULATION ©



Configure the level of interaction that operators have with the program, what additional content is displayed, information about patron lexiles, messages that appear in the patron notices sent from your library, and the general circulation settings for holds, reservations, and charges.



BARCODES (BC)



The **Barcodes** allow you to configure how Alexandria reads barcodes for Items and Patrons. This is beneficial if your library uses customized barcodes or barcodes from vendors like Follett.



PATRONS (PN)



The **Patrons** preferences are used to configure general settings for library patrons, such as: default pictures, barcode settings, policies, grade tables, and security groups.



ITEMS III



The **Items** preferences are used to configure general settings for everything that circulates: default item barcode ranges, default policies, terminology, catalogue settings, subject sources, and medium pictures.



RESEARCHER RP



The Researcher preferences configure your online public access catalog defaults and regulate the general access privileges and circulation operations allowed when patrons search your catalog.

THE ALEXANDRIA RESEARCHER SUITE

Alexandria comes loaded with a number of search interfaces that empower your patrons to place holds and reservations, create reading lists, write book reviews, renew loaned items, check fines, and view current loaned items and hold requests.

With the ability to access and search your library collection(s) from anywhere in the world, patrons can locate learning resources whenever they need—even after school; all from desktop computers, notebooks, tablets, and other mobile devices.

Librarians and teachers can delve into the collection in order to plan lessons, assignments, and activities.

RESEARCHER INTERFACES



SEARCH SE



Search is an exquisitely robust and exceedingly customizable library search interface with advanced search and filtering tools that help patrons locate materials based on Lexile, medium, series, reading levels, and more. With it, you can locate resources, show availability, place holds, create reading lists, and even write reviews!



SCOUT



Scout is a fast, powerful, and genuinely intuitive "smart search" that returns the most likely candidates first. With Scout, bias is shown towards titles, authors, series, and subjects before all other keywords. In fact, results with an exact title or author match are always displayed first, making the findings more relevant than those found using a pure keyword search.



EXPLORE EX



Explore is an entirely customizable, visually engaging, graphical interface that uses pictures and icons to help patrons—who do not yet read proficiently—find what they need in your collection.



BULLETINS BB



Bulletin boards allow you to post highly customizable messages for other users that contain text, images, links to reading lists, search results, or other outside URLs. They can be assigned a specified date range with an automatic expiration date or remain posted for an indefinite length of time.



MOBILE



Alexandria Mobile is a simplified search interface designed for iOS and other mobile devices that allows patrons, librarians, and teachers to quickly browse library collections on-the-go, anywhere, anytime.

IMPORTING PATRON AND ITEM INFORMATION

After configuring your initial Alexandria settings and preferences, the next step is to import your patron and item information.

Most new users take advantage of our data conversion service; therefore, importing your patron and item information may have already been done for you. If so, you may disregard this section and skip ahead to Add-Ons & Extras starting on page 15.

Alexandria can import patron and item records (including pictures) and transaction scripts. Additionally, with our FTP import functionality, an entire patron record database can be stored in a central location and Alexandria, once configured, can import new (or update existing) patrons as they become available.

Alexandria can import patron and operator data from any source capable of outputting text files in a tab-delimited format. Check with your front / district office to find out if your patron data is stored in a machine-readable format.

Alexandria can import item information from outside sources (such as book vendors) in industry-standard MARC, MicroLIF, or tab-delimited format.

To **Import** patrons and items into Alexandria, append "/import" to the end of your Data Station's domain name.

RFLATED IMPORT TOPICS IN ALEXANDRIA'S SUPPORT CENTER

| IP | Search with this keycode for comprehensive information on Import settings |
|----|--|
| FM | Search using this keycode to reference patron and item Field Mapping tables |
| PS | Search with this keycode to learn more on importing patron and item pictures |
| TR | Search using this keycode to learn more about importing Transcription Scripts |

ADD-ONS AND EXTRAS

OPTIONAL INTERFACES AND MODULES

These stand-alone features allow you to implement SIS automation, enhance your collection with Lexiles, or add an Alexandria search widget to any given web page.



SIF /sif SF

SIF is an industry-supported blueprint that enables diverse applications to interact and share data seamlessly. SIF reduces data entry redundancy and allows information to be efficiently exchanged among different applications using a standard set of specifications.



SIP2 S2

Utilize hardware that supports the SIP2 protocol (e.g. Checkpoint, 3M, etc.); this makes your library more efficient by enhancing your inventory and security features. With SIP2, you can also empower your patrons with self-service check in and out modes.



Lexile 🔯

Lexiles are a scientifically-based reading measurement used to match a patron's reading skill to the overall difficulty of a specified text. This module provides educators with a standardized system of measurement, allowing them to better monitor the reading progress of their students.





Advanced Bookings provide a valuable extension to Alexandria's standard reservation capabilities. This useful module streamlines the management of centralized media centers that process numerous requests each day.



Search Widget w

The Search Widget draws attention to your library and invites people to search your catalog directly from your school or library website. Depending on your needs (and preferences), you can implement a Simple or Advanced search widget.



Z39.50 Z3

The Z39.50 Server feature allows your Data Station to be used as a Z39.50 server so that remote systems can access and search your database.



Self Service /selfservice or serviceinout ss

Allow your patrons to check items in or out by themselves at a self-service station.

AFFILIATE INTEGRATIONS

We offer a variety of integration options for products or services purchased from third-party providers. These tools help enrich your collection by providing content summaries, awards, reviews, recommendations, and more. If you don't already subscribe to some of these services, contact COMPanion to learn more.



Novelist •



NoveList integration allows access to a reader-advisory service that enriches Alexandria's search results by offering related reading recommendations, similar authors, articles, and more. Patrons can access supplemental content as they search, leading to increased library circulation.



netTrekker 👊

Unlike ordinary search engines, our integrated netTrekker search contains only academic-focused websites organized around K-12 curricula. Students can safely search the internet for school projects and get high-quality, contextual results every time.



Sneak Peek 📧



Sneak Peek connects patrons to a wealth of information relating to all types of books, including title reviews, descriptive summaries, and cover art images.





Soundzabound is the only subscription service that specializes in royalty-free music and audio-clips which meet the copyright safety, licensing, and technology requirements necessary for grades K-12 and beyond.



SAFARI Montage SM



SAFARI Montage integration provides on-demand internet streaming media for K-12 schools, facilitating visual instruction and learning in the classroom. SAFARI Montage offers educators a single interface to access visual resources from inside the school or home.



Mackin M

Mackin integration allows you to automatically add MARC records for new Mackin purchases and export your data in MARC format to auto-upload to Mackin's website for review.





Baker & Taylor integration allows you to export your data in MARC format and upload it to Baker & Taylor's website for review.



Perma-Bound B



Perma-Bound integration allows you to export your data in MARC format and automatically upload it to Perma-Bound's website for review.

eBOOK INTEGRATIONS

Although each of our eBook partners are integrated slightly differently, they are all designed to make it easier for libraries to locate, use, and manage electronic resources using the eBooks services to which you already subscribe. Depending on the service(s) you use, Alexandria may share patron status information, automatically retrieve MARC record updates, show real-time availability, support single sign-in, and even assist in the purchasing of new eBooks— all huge conveniences for patrons and librarians alike.





OverDrive is the worldwide leader and full-service digital distributor of eBooks, audiobooks, music, and video. They deliver DRM-protected download fulfillment services for libraries and schools.



MackinVIA w



MackinVIA is a complete electronic resource management system providing easy access to eBooks and educational databases. With just one login, users can view, utilize, and manage all their MackinVIA electronic resources.



Axis360



Axis 360 is Baker & Taylor's revolutionary digital media library, providing schools with a state-ofthe-art system for circulating digital books and audiobooks.



Capstone Interactive



Capstone Interactive makes it easy to add interactive eBooks to your library collection. Capstone Interactive eBooks provide text highlighting, audio support, smart search options, and educator support.



PebbleGo 📧



Capstone PebbleGo is an innovative K-3 database from Capstone Press taking multimodal learning to the next step by making research and literacy accessible to even the youngest students.



Perma-eHub



Perma-eHub integration helps to manage all of your eBook licenses from a central location as if they existed in a single library.





Capstone Publishers provides children's books and digital products, focusing on the education market. As an affiliate, they offer non-fiction, picture books, interactive books, audio books, literacy programs, and digital media.

HARDWARF AND ACCESSORIES

We recommend ordering officially supported hardware, accessories, and related products directly from COMPanion. This is your assurance that we have approved and guaranteed the quality of these products; otherwise, you may experience unexpected results or compromised print quality, for instance, when using unsupported forms or labels.

We offer barcode readers, printers, the finest photo-composed and laser-printed labels, and more—all designed to work seamlessly with our software. Please contact our expert Sales department at (800) 347-6439 or by email at sales@companioncorp.com and ask us about our hardware products or accessories.



Scanners

- Our high-performance barcode scanners are pre-configured to work with Alexandria.
- Our wireless scanners give you the freedom to roam while staying connected.
- · Advanced LED technology with bright, sharp aiming lines and high resolution imaging.
- Read barcodes quickly and accurately without touching the label.



Receipt Printers

- Receipts keep patrons informed of their due dates, fines, payments, holds, reservations, etc.
- Our high-quality printers are small, fast, and functional—designed for everyday use.
- Clean, quiet thermal printing.
- · Durable and long-lasting.



Cash Drawer

- Fully functional cash drawer (with removable till compartment).
- Designed to function with COMPanion's receipt printer hardware.
- Programmed to automatically open after specific transaction events.



Labels III



- We offer both standard and high-quality labels.
- High-quality labels use a printing process that makes the barcode part of the label.
- Lamination and adhesives for these options increase durability.
- Standard labels are created with a process that simply places the ink on top of the label (we recommend label protectors for this option).

ADDITIONAL SUPPORT

You may contact COMPanion's **Sales** or **Customer Support** departments via phone or email to learn more about Alexandria features. Our skilled and knowledgeable staff will be able to answer any technical or software- related questions you may have.

CONTACT SALFS

CONTACT CUSTOMFR SUPPORT

Phone

Toll free: (800) 347-6439 Worldwide: 1 (801) 943-7277

Fax

Phone

Toll free: (888) 515-3883 Worldwide: (801) 943-7752 Worldwide: (801) 943-7752

Worldwide: 1 (801) 943-7277

Toll free: (800) 347-4942

Email

Fax

sales@companioncorp.com

Email

support@companioncorp.com

Alexandria's Online Support Center

User's Manual http://support.companioncorp.com/display/ALEX/Support

Training and Videos

Alexandria Training Videos

Getting Started Resources Tip of the Week

http://support.companioncorp.com/display/ALEX/Video+Directory

http://support.companioncorp.com/display/ALEX/Getting+Started+Resources http://support.companioncorp.com/display/ALEX/Tip+of+the+Week

Add-ons and Extras

Partner Files http://www.goalexandria.com/resources/partner-files/

CONNECT WITH US! 📢 💟 🚱 in 👂











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