

# Alexandria<sup>®</sup>

## GETTING STARTED GUIDE

VERSION 7 | SELF-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](mailto:support@companioncorp.com) or call (800)-347-4942.

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# PACKING LIST

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## THANK YOU FOR CHOOSING ALEXANDRIA!

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

### SELF-HOSTED LICENSES

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Self-Hosted License	<input type="checkbox"/>	SH7800
Textbook Tracker, Per Site, has Alexandria Library	<input type="checkbox"/>	BA7800
Textbook Tracker, Per Site, no Alexandria Library	<input type="checkbox"/>	B7800

These optional services are activated by registration codes; setup information is available by searching key codes in Alexandria's online [Support Center](#).

### ADD-ONS

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Online Services Integration	<input type="checkbox"/>	E5799	Public Library Enrichment Integration	<input type="checkbox"/>	E9999
Advanced Bookings Integration	<input type="checkbox"/>	E5588	Z39.50 Server Support	<input type="checkbox"/>	E5577
SIS Integration K-12	<input type="checkbox"/>	E8888	Novelist Integration	<input type="checkbox"/>	E7500
SIS Integration K-12 with GG4L	<input type="checkbox"/>	E8888G	K-12 Sneak Peek	<input type="checkbox"/>	E5962
Expanded Lexile Services	<input type="checkbox"/>	E5590b			

### COMPANION SELF-HOSTED SOFTWARE SUBSCRIPTION INCLUDES:

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- 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.

# WELCOME TO ALEXANDRIA

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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, textbooks, 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 Textbook Tracker** modules are an optional addition to Alexandria that allow you to manage textbook circulation.



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

## SELF-HOSTING BENEFITS

When Alexandria is **Self-Hosted**, you’re in charge of installation, configuration, server maintenance, and network troubleshooting. You’re also responsible for setting up your own DNS, routinely updating the program, and performing frequent backups.

- You are in control of the system and its database(s).
- You allocate the IT staff, server facilities, and operating system platforms.
- You schedule when software updates are performed.
- You institute secure backup strategies and resolve network connection issues.
- You make provisions for up-front and ongoing maintenance costs of computer hardware.

If you have chosen to install on-premises, you may want to reconsider having COMPanion host your data. To find out more about **Cloud-Hosted** services, please contact your sales representative at **(800) 347-6439** for information and pricing – it’s probably more affordable than you think.

**Note:** Alexandria is installed as an operating system service (Windows) or a launch daemon (Macintosh); therefore, it has no native interface.

# 1 INSTALLATION SUMMARY

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You will be installing Alexandria on the machine you've designated as your Data Station (i.e. server); ideally, a dedicated machine isolated from the public and only accessible for infrequent operator maintenance. Our most current Alexandria hardware and operating system recommendations can be found by searching using keycode **RH** in Alexandria's Support Center.

COMPanion will email you with instructions and a link to download your **Alexandria v7 Installer**. 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. Download the **Alexandria v7 Installer** to your Data Station machine. When downloading files, we recommend you save them to your operating system **Desktop** so they are easily located. Once downloaded, double-click on the Alexandria software installer.

Alexandria will install to an operating system-specific directory. If one doesn't previously exist, the installer will create a **COMPanion Corporation\Alexandria** folder and extract the application there.

**On Windows machines, this is located in the following directory:**

```
Hard Drive (typically C:) \ Program Files (x86) \ COMPanion Corporation \ Alexandria
```

**On Macintosh machines, this is located in the following directory:**

```
Hard Drive \ Users \ Shared \ Library \ Application Support \ Alexandria Support
```

During installation, Alexandria will attempt to register with your operating system as a service. Afterward, restart your computer to finalize the process. From this point on, Alexandria will launch at startup and continue to run in the background.

That's it! You've installed Alexandria! If you're a single-site license, you are finished installing. If you're part of a Central Catalog, be sure to set up your additional sites now; read more about that on page 9 or search Alexandria's online [Support Center](#) using keycode **ST**


**Note:** If you are running an Alexandria Controller, there are some additional details for which you should be aware; read about them in our [Support Center](#) using keycode **CT**

## CLIENT/SERVER COMMUNICATIONS – ADDRESSES, PORTS, PROTOCOLS

Accessing Alexandria’s standard and expanded services requires that you configure your firewall to allow certain ports and addresses. Alexandria web clients communicate with the Data Station using TCP/IP protocols, typically over web port 80. Therefore, the Alexandria Data Station needs to have a fixed TCP/IP address.

Title Assistant and Z39.50 queries (i.e. MARC record queries) typically use Port 210, Port 2200, and Port 7090 (Library of Congress); your Data Station(s) will need these ports open.

The Alexandria Data Station is updated via the cloud; if you filter or limit your network traffic, please allow access to s3.amazonaws.com and s3.amazonaws.com for outbound communications in order for registration and other services to function properly.


A comprehensive list of addresses you should allow in your firewall’s access control list can be found by searching keycode  in Alexandria’s [Support Center](#).

## INFORMATION AND TECHNOLOGY SERVICES QUICK REFERENCE GUIDE

NAME	PORTS	IP ADDRESS	URL/WEB ADDRESS
Alexandria Data Station	30427		
COMPanion Web Services	80		
COMPanion Core Services	80		<a href="#">s3.amazonaws.com, s3amazonaws.com</a>
COMPanion FTP Support	21	209.210.70.4	<a href="#">ftp.companioncorp.com</a>
COMPanion Cover Art			<a href="#">aws.amazon.com, images.amazon.com</a>
Google Analytics	80		<a href="#">google-analytics.com</a>
Title Assistant & Z39.50	210/2200/7090		
Alexandria Support Center	80	209.210.70.4	<a href="#">www.goalexandria.com/v7Docs/index.php</a>
COMPanion Support Email	25		<a href="#">mail.companioncorp.com</a>
COMPanion Update Server			<a href="#">s3.amazonaws.com, s3amazonaws.com</a>

**Note:** Our standard report format is PDF; we recommend using the latest version of Adobe’s PDF reader to print labels and view reports.

## 2 REGISTRATION

Registration is largely automatic; the installer includes your unique **Self-Hosted** registration information in the Configuration.txt  file stored in Alexandria’s **Data** folder—located in your operating system’s shared application support folder (page 3)—your Data Station just needs to connect to COMPanion servers in order to validate. 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.

## 3 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**, or **Edge**.

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>

If you’re running a **Distributed Catalog** under an Alexandria Controller, you may need to follow your (optional) port number with a valid Data Station serial number to access a single site:  
<http://123.456.78.910:80/1234567/librarian>

Optionally, access to individual sites can be enabled using the **Show Available Data Stations List** or by setting up **Server Domain Names** for each Data Station using the IT Controller’s **Administration** settings (page 10). To access the Controller’s “/admin” interface, forego the site-specific serial number:  
<http://123.456.78.910:80/admin>

**Note:** To access **Textbook Tracker** modules via URL, append “tt-” to the module name, e.g. /tt-circulation

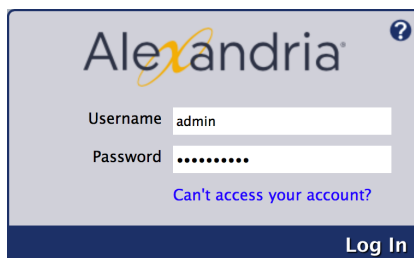
## BOOKMARKING MODULES

For convenience, you can “bookmark” any module 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 any module from your operating system’s **Desktop**; to do this, open the module, highlight the URL in the **Address** field (or “favicon”) and drag it to your **Desktop** to create a link.

**Note:** You can enable and enforce SSL encryption for all connected web clients in your **Administration Database** settings.


## 4 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** and **Textbook** 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.

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 



## 5 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

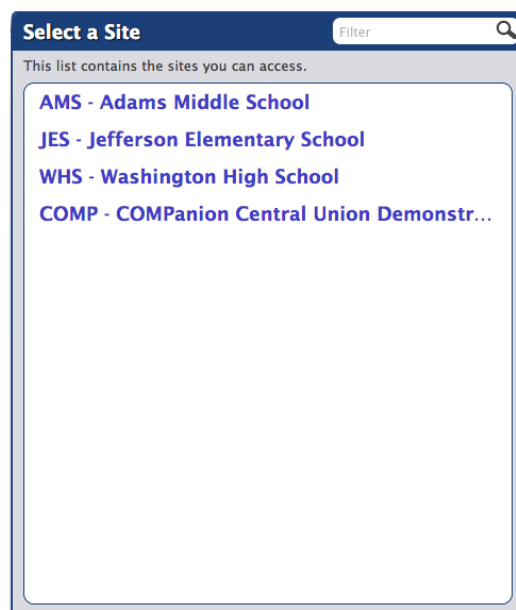
<a href="#">/librarian</a>	Alexandria's main operator hub, providing access to all the modules needed to manage and maintain your library.
<a href="#">/researcher</a>	Our collection of search interfaces allows patrons to explore your library collection based on their skill level.
<a href="#">/admin</a>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

Our most current list of [Modules](#) can be found on Alexandria's Support Center main page.

## 6 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**.

**Note:** The **Select a Site** option is only available to those who only have access to multiple locations.



# SET UP AND ORIENTATION

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## 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 request/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.

**Note:** 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"](#), ["/items"](#), ["/patrons"](#), or ["/tools"](#).

# THE ALEXANDRIA TEXTBOOK TRACKER INTERFACE



## CIRCULATION

The **Circulation** module is used to perform general circulation such as issuing textbooks and processing fees/fines/payments. You may also perform special functions such as inventory, cataloging, and record maintenance.



## TEXTBOOK MANAGEMENT

The **Textbook 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.



## 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. Note that **Patrons** are shared between **Librarian** and **Textbook** interfaces.



## 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**.

**Note:** 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: ["/tt-circulation"](#), ["/tt-items"](#), ["/tt-patrons"](#), or ["/tt-tools"](#).

# 1 SETTING UP ALEXANDRIA

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 windows; 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/Textbooks** 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** user, 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.

# 2 SITES MANAGEMENT – CENTRAL CATALOG

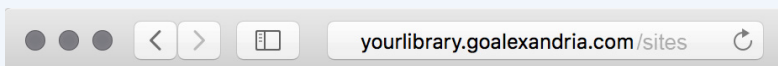


## SITES MANAGEMENT

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.

**Note:** 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 

### DATA STATION ADMINISTRATION SETTINGS CHECKLIST



#### EMAIL

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.



#### DATABASE

The **Database** settings allow you to specify how many archives to keep, and where they will be stored. Alexandria performs **Database Maintenance** automatically to keep your data in tip-top shape.



#### WEB

The **Web** settings relate to general library connectivity and allow you to configure the SSL (Secure Sockets Layer) certificates, ports, and server domain name that Alexandria uses to communicate with **Librarian** and **Researcher** web clients.

## 4 PREFERENCES

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 [Librarian Support Center](#) or [Textbook Tracker Support Center](#) 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 **Librarian Preferences**, append `"/preferences"` to the end of your Data Station's domain name, or `"/tt-preferences"` for Textbook Tracker settings.

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

### PREFERENCES CHECKLIST

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

<input type="checkbox"/> Security	Create and manage your operator security groups and access levels.
<input type="checkbox"/> Localization	If required, customize your local terminology and currency standards.
<input type="checkbox"/> Calendars	Schedule library open days, closed days, period due dates, and more.
<input type="checkbox"/> Policies	Establish rules that regulate how your library resources are used by patrons.
<input type="checkbox"/> Circulation	Configure how your operators interact with Alexandria.
<input type="checkbox"/> Barcodes	Configure how Alexandria reads patron and item barcodes.
<input type="checkbox"/> Patrons	Configure general settings for your patrons and operators.
<input type="checkbox"/> Items	Configure general settings for library materials and resources.
<input type="checkbox"/> 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** LO

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** PO

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** CP

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** IT

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 SC

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.



## 5 IMPORTING PATRON AND ITEM INFORMATION

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

**Note:** 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.

### RELATED 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 <b>Field Mapping</b> 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 <b>Transcription Scripts</b> .

# ADD-ONS AND EXTRAS

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## OPTIONAL INTERFACES AND MODULES



### TEXTBOOK TRACKER TT

Textbook Tracker is a dedicated application for managing your textbooks, and patrons are shared with Alexandria Librarian. Administration and Preferences overlap, so you spend less time setting up and more time with your catalog.



### 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 LX

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 AB

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 SW

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 SS

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



### CLEVER CL

Clever makes it easy to connect student information systems (SIS) with learning apps. Software is auto-rostered for district administrators, kept up-to-date for classrooms, and installed with one-click logins for students.

## AFFILIATE INTEGRATIONS

**Note:** 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** NL

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** NT

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.



### **SNEAK PEEK** PK

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** SB

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** MK

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** BT

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



### **PERMA-BOUND** PB

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

**Note:** 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 OD

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 MV

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 AX

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



### CAPSTONE INTERACTIVE CI

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 PG

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 PE

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 CB

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.

# HARDWARE AND ACCESSORIES

**Note:** 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](mailto: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 LB

- 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).

# BACKUPS AND UPDATES

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## 1 BACKUPS

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Files in your database change every time you use Alexandria; whether you update an item or patron record, perform a transaction, or run a utility. Therefore, it's imperative to have a backup strategy in place so that you always have a current backup of your Alexandria database. With an adequate backup procedure in place, only small amounts of information will ever be lost, even after the worst conceivable failure.

To clarify, we consider a backup to be a duplicate copy of your entire Alexandria database saved to an external source, at an external location, on regular intervals. We suggest that you perform frequent and secure backups of your valuable data; in fact, daily backups of your Alexandria data are highly recommended.

Your only options for recovering data after a major loss are to re-enter it by hand or to recover it from your most recent backup—and then update only the data that has changed since the last backup was made. The more current the backup of your data, the less information will need to be re-entered.

### DEVELOP A SECURE CLOUD BACKUP STRATEGY

If you don't already have a backup strategy in place, start one today. Your choice of backup strategy depends on your budget, the amount of data you need to backup, and the policies and procedures of your library or district.

Cloud storage backup is simply the most reliable, cost-effective, and efficient solution—especially if you have large amounts of data. With cloud storage, you can set backup procedures to run at predetermined dates and times without operator interaction. Currently, most cloud storage services allow you to upload several gigabytes of data for free when you create an account and offers other paid alternatives at reasonable prices. Whatever you put into your cloud folder is automatically saved to remote servers and can be recovered quickly in case of disaster. Additionally, most cloud storage systems (such as CrashPlan) offer professional, on-premises backup solutions.

Regardless of what you use, test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this before you have a problem so you'll know that you can recover data in an emergency.

### WHAT AND WHEN TO BACKUP

All pertinent Alexandria information—patron, item, report, and system preference information—is copied to your Data Station's Archive folder (page 4); this makes it easy to backup your data regularly.

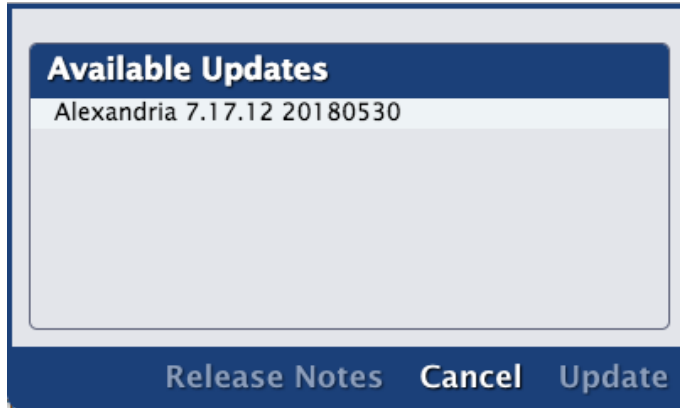
Your backup procedure should include copying the Archive folder entirely at the end of each day. This way, you'll be able to quickly recover data on a daily basis—should it be required.

Archive and make additional backups of your Data folder before and after any major changes to your system. For example, you should archive and backup your data before and after you perform inventory and use Utilities to update your records at the end of the year.

## 2 UPDATING ALEXANDRIA

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With a valid software subscription, updates and next-generation versions are provided at no additional cost. You stay current with the latest technologies and never have to repurchase Alexandria—ever!



Here's how to perform an Alexandria software update:

- Select **Check for Updates** in the **Actions** menu of the **Administration** interface. If an Alexandria update is available, information is shown in the **Release Notes** section. From there, you can choose to download and update your Data Station or postpone until a future date.

*Remember to always perform an archive before updating to a newer version of Alexandria!*

# ADDITIONAL SUPPORT

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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 SALES

### Phone

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

### Fax

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

### Email

[sales@companioncorp.com](mailto:sales@companioncorp.com)

## CONTACT CUSTOMER SUPPORT

### Phone

Toll free: (800) 347-4942  
Worldwide: 1 (801) 943-7277

### Fax

Worldwide: (801) 943-7752

### Email

[support@companioncorp.com](mailto:support@companioncorp.com)

## ADDITIONAL SUPPORT

### Alexandria's Online Support Center

[User's Manual](#)

### Training and Videos

[Alexandria Training Videos](#)

[Getting Started Resources](#)

[Tip of the Week](#)

### Add-ons and Extras

[Partner Files](#)

[Add-on Support](#)



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### CONNECT WITH US!

