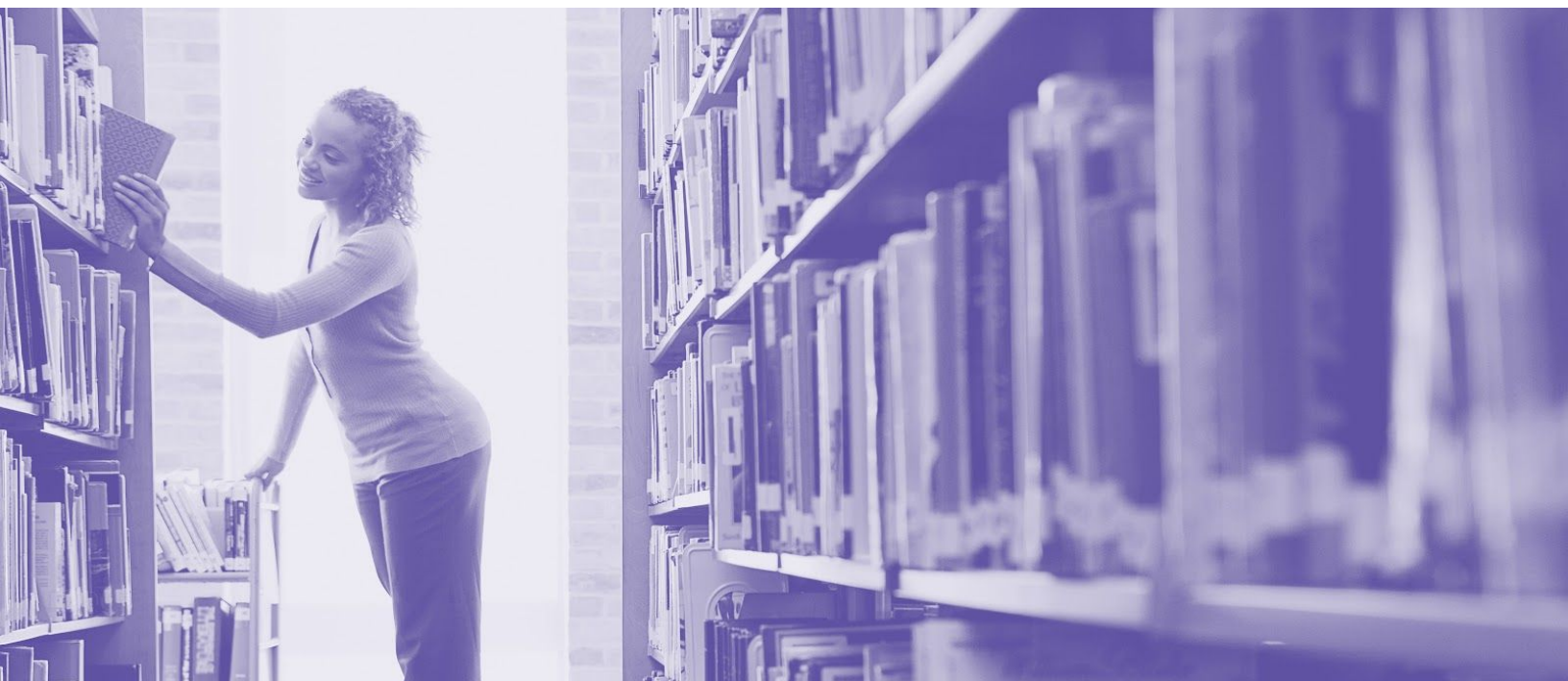


Alexandria[®]

VERSION 7

GETTING STARTED GUIDE FOR LIBRARIANS



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

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WELCOME TO ALEXANDRIA

Alexandria has been automating public, private, school, 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.



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.



Textbook Tracker allows you to easily manage textbook circulation and can be used independently or in conjunction with Alexandria Librarian.



Alexandria Researcher empowers your patrons with a suite of visually-engaging search interfaces they can use to discover and access your resources.



Throughout this guide, you'll see keycodes like this **CO**. They're handy shortcuts you can search in the Support Center to find more information on various topics. See the [Keycode Directory](#) for a full list.

When Alexandria is cloud-hosted, you save time and resources. We perform daily archives and backups of your data from our advanced data centers as well as handle all updates and upgrades. [Learn more](#) and let your IT department/admin know how they can benefit from our hosting.

1 Registration

Cloud Hosted

Registration is automatic. Just follow the URL we provide and begin managing your library immediately. COMPanion will email you this URL and the 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.

Self Hosted ^{CF}

Registration is largely automatic. Your configuration.txt file in the Alexandria Support folder includes your unique self-hosted registration information (see our [Self-Hosted Guide for Admins](#) for more information). Your data station just needs to connect to COMPanion servers in order to validate.



For both cloud-hosting and self-hosting, 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.

2 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, and Edge. They're also accessible on mobile devices, laptops, and tablets, such as Apple's iPad, Google's Chromebook, and others.

See our most current list of [System Requirements](#) ^{RH} in the Support Center.

To access **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:

`http://yourlibrary.goalexandria.com/librarian`



To access **Textbook Tracker** modules via URL, append "tt-" to the module name (e.g. /tt-circulation).

Additional Information for Self Hosting

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 by 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 11). To access the Controller's "/admin" interface, forego the site-specific serial number:

`http://123.456.78.910:80/admin`

Bookmarking Modules

For convenience, you can bookmark any module or add it to your browser's list of favorites. To do this, click on 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.



You can enable and enforce SSL encryption for all connected web clients in your **Administration Settings** ^{AD}.

3 Security Operator Log In

Alexandria[®]

Username DLightman

Password

[Can't access your account?](#)

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 Tracker** 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 each operator to have their own username and password and belong to the appropriate Security Group. Keep in mind that some operators may not have permission to access certain interfaces or perform some tasks.

Search keycode ^{CO} for information on creating additional Alexandria operators.

4 Interfaces and Modules

Here are just a few Alexandria interfaces 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 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 in our [Self-Hosted Guide for Admins](#).

Prominent Alexandria Interfaces and Modules

/librarian /circulation	Alexandria's main operator hub, providing access to all the modules needed to manage and maintain your library
/researcher	Our collection of search interfaces that allow patrons to explore your library collection based on their skill level
/admin	Advanced technical settings where you manage email services, configure web settings, check for updates, and run archives
/selfservice	Stations where patrons can check in and out their own materials
/inventory	An interface specifically designed to ease the burden of performing inventory
/reports	Templates used to generate lists of library information and statistics or your own customized labels
/textbooks	Textbook Tracker hub, providing access to all the modules needed to manage your textbooks (registration required)

View the most current [list of modules](#) in the Support Center.

5 Site Selection ST – Centralized Catalog

In a Centralized Catalog, you will need to select a site after logging in. If you don't yet have sites other than the [Union Site](#), review the Sites Management section on page 10 to find out how and where to create them.



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

ORIENTATION AND SET UP

The Alexandria Librarian Interface

After logging 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**, **Items Management**, **Patrons Management**, **Tools**, and **Researcher**.

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.



ITEMS 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).



PATRONS 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. This includes everything from **Preferences** to **Administration** settings, not to mention **Reports**, **Utilities**, **Export**, and **Import**.



RESEARCHER

The **Researcher** portal allows patrons and operators to choose the interface used when searching the 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, append the end of your data station's domain name with one of the following terms: `"/circulation"`, `"/items"`, `"/patrons"`, or `"/tools"`.

Use **Offline Mode** to continue working when things go wrong, such as a network failure. If your server connection is lost, Alexandria will prompt you to work in Offline Mode. You can also access the interface while you're still online by adding `/offline` to the end of your Alexandria login URL.

The Alexandria Textbook Tracker Interface

After logging in, you'll arrive at the **Textbook Management** 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 **Textbook Tracker** modules: **Circulation**, **Textbook Management**, **Patrons Management**, **Tools**, or **Researcher**.

Textbook Modules



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.



PATRONS 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. This includes everything from **Preferences** to **Administration** settings, not to mention **Reports**, **Utilities**, **Export**, and **Import**.



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`.

Use **Offline Mode** to continue working when things go wrong, such as a network failure. If your server connection is lost, Alexandria will prompt you to work in Offline Mode. You can also access the interface while you're still online by adding `/tt-offline` to the end of your Alexandria login URL.

The Alexandria Researcher Suite

Researcher 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 more.

With the ability to access and search your library collection from anywhere in the world, patrons can locate learning resources whenever they need—even after school—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



EXPLORE PANE ^{EB}

The Explore Pane is your Researcher's home page. From here, patrons can click on icons that link to other interfaces. You can easily customize these icons and corresponding links using [Explore Builder](#).



BROWSE ^{BR}

Browse is a fun and simple search interface that displays results as book covers on digital shelves. You can filter results by Newest, Highest Rated, or Genre. This is ideal for patrons who don't have a specific book in mind while searching, but want to find something within their general interests.



SEARCH ^{SE}

Search is a robust and 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 intuitive "smart search" that returns the most likely candidates first. 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, and 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 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.

1 Setting Up Alexandria

As you explore Alexandria, you will 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 take you to a related section of Alexandria's online [Support Center](#).

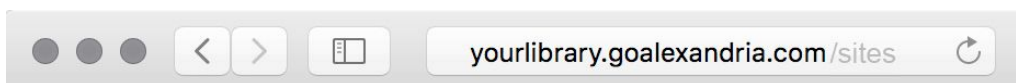
After accessing **Librarian/Textbooks** and familiarizing yourself with the interface, we suggest you configure your site information before going any further. Although most of your Union Site information may have been provided for you, you'll want to verify that the information is accurate. If you are a Centralized 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 – Centralized Catalog

For single site licenses, you will only ever maintain information for one site. However, in a Centralized Catalog, you manage multiple collections, and we provide you with a Union Site. The Union Site should not be regarded as an actual, physical location. Instead, think of it as the “parent” to which all your other site collections belong.

To access the **Sites Management** module, go to **Tools > Sites**, or append “/sites” to the end of your data station's domain name (or IP address).



Search the [Support Center](#) using keycode  to learn how to add, duplicate, delete, and edit site records using the **Sites Management** module.

3 Administration Settings

Use the **Administration** interface to configure email settings, which need to be set up if you want to send letters and notices from within Alexandria. This should be set up 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.

If you are self-hosted, see our [Self-Hosted Guide for Admins](#) to learn about other relevant **Administration** settings.

4 Preferences PF

Alexandria's **Preferences** allow you to make changes to the system and its behavior. This is where you'll customize Alexandria to fit your library's particular needs.

The checklist below is meant to serve as a quick reference to get you started. Visit our [Alexandria Support Center](#) or [Textbook Tracker Support Center](#) to get more comprehensive information on each preference. You can also schedule a training for this purpose.

To access Alexandria's **Preferences**, append “/preferences” to the end of your data station's domain name or “/tt-preferences” for **Textbook Tracker** settings. Alternatively, go to **Tools > Preferences**.

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	Review 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

See the next page for more information on each listed preference.



SECURITY ^{SP}

Security Preferences are used to create and manage patron access levels by manipulating lists of permissions. A patron's security level determines what actions they are allowed to perform and what areas of the program they have access to. In other words, operators are denoted by Security Group and not a special patron type.



LOCALIZATION ^{LO}

Localization Preferences allow you to customize your local terminology and currency standards.



CALENDARS ^{CA}

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: assigning due dates, calculating fines, and managing 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}

With **Circulation Preferences**, you can 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}

Barcodes Preferences 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}

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



ITEMS ^{IR}

Items Preferences are used to configure general settings for everything that circulates, such as default item barcode ranges, default policies, terminology, catalog settings, subject sources, and medium pictures.



RESEARCHER ^{RP}

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

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.



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 skip to the next page.

Alexandria can import patron and item records, 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. We also offer several SIS integration options that add and update patron records automatically; see the next page for more details.

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 or go to **Tools > Import**.

Related Import Topics in Alexandria’s Support Center

- [Import Settings](#) ^{IP}
- [Field Mapping for patrons and items](#) ^{FM}
- [Importing Patron Pictures](#) ^{PS}
- [Importing Transaction Scripts](#) ^{TR}

ADD-ONS AND EXTRAS

Optional Interfaces and Modules



TEXTBOOK TRACKER ^{TT}

Textbook Tracker is a dedicated application for managing your textbooks. **Patrons**, **Administration** settings, and **Preferences** overlap with Alexandria **Librarian**, 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 allows integration with your student information system, which reduces data entry redundancy and allows information to be efficiently exchanged.



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 check out modes.



LEXILE ^{LX}

Lexiles are a scientifically-based reading measurement used to match a patron's reading skills to the overall difficulty of a specified text. This add-on allows per-grade assignment of Lexile scores for patrons and automatically updates the Lexile scores for your titles when those numbers become available through MetaMetrics.



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. It is auto-rostered for district administrators and kept up-to-date for classrooms.

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 ^{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}

netTrekker connects teachers and students to the industry's leading digital Open Educational Resource (OER) library with over 360,000 resources that are expert-curated, fully aligned to state and Common Core standards, and continuously reviewed.



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 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

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 that provides 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.



CAPSTONE PEBBLEGO ^{PG}

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



CAPSTONE PUBLISHERS ^{CB}

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



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.

Hardware 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 to ask about our hardware products or accessories.



SCANNERS

- Pre-configured to work with Alexandria
- 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

- Our high-quality printers are small, fast, and functional—designed for everyday use
- Clean, quiet thermal printing
- Durable and long-lasting



LABELS LB

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

ADDITIONAL SUPPORT

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

Contact Customer Support

Phone

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

Fax

Worldwide: (801) 943-7752

Email

support@companioncorp.com

Online Resources

Support Center

[Explore Alexandria](#)

[Tip of the Week](#)

[Keycode Directory](#)

[Textbook Tracker Support Center](#)

Training and Videos

[Getting Started Resources](#)

[Alexandria Training Videos](#)

Add-ons and Extras

[Partner Files](#)

[Add-on Support](#)



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